

COVID-19 Tourism Impact Update



Falkland Islands Tourism Sector Information and Guidance Concerning the Impact of COVID-19

No. 20
July 2nd 2021

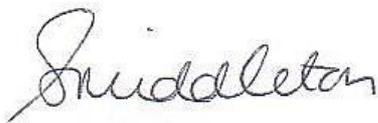
INTRODUCTION

Globally, optimism is rising for international travel, and all the data coming out of the Internet, ranging from Google to online tour operators and online data research firms confirms this. But it would be wrong to suggest that the tourism sector is getting back to normal. There's still some way to go, and without doubt 2021 will be characterised by domestic trips.

However, there's a rapidly growing number of destinations that are open to travellers with two vaccinations, as long as they take a test before travelling and complete an online travel declaration form. Despite the extra hassle and cost, many people are happy enough to do this if it means they can travel again – not least as many have vouchers from cancelled trips and lots of company holiday time to use up. In this issue we've taken a look at the current tourism status of the UK's overseas territories as an interesting cross-section of islands and how they are preparing for tourism to restart.

We've also included a round-up of the latest travel trends based on consumer internet research and booking patterns, which also show that things are improving with regards to international travel, even if long haul trips are probably more likely in 2022 than 2021.

As always, please don't hesitate to contact the Falkland Islands Tourist Board for more details or any further assistance.



Stephanie Middleton

Executive Director

2nd July 2021

Next Update: Friday 3rd September 2021

HOW ARE OTHER OVERSEAS TERRITORIES OPENING UP?

The opening of destinations to tourism is a topic that is extremely current for both travellers wanting to get back on the road, and for destinations wanting to get their economies back on track. At the moment it's a mixed bag, ranging from destinations opening up for those with two jabs through those that still remain closed to everyone except returning residents. Without doubt, leisure tourism will remain highly restricted as long as quarantine remains in place for travellers on arrival at a destination (at least for more than 48 hours).

We've researched the current entry conditions for all of the UK's overseas territories to get a feel for what the other islands are doing. Overall there is considerable variation. The good news for British travellers is that all OT's are currently on the Green List, meaning that no quarantine is required when returning back home after a trip. But what about on arrival? The table provides more complete details, but in summary they can be divided into three groups:

- **Open for tourism:** Bermuda, British Virgin Islands, Gibraltar, Turks and Caicos Islands
- **Open but with quarantine between 5-10 days:** Anguilla, Cayman Islands, Montserrat, Saint Helena/Ascension/Tristan da Cunha
- **Closed:** Pitcairn Islands

What is becoming increasingly common is the requirement to complete an online travel authorisation form. These are usually quick and easy (and from the perspective of Tourist Boards/Governments are brilliant for data and knowing more about visitors). The other trend is the opening up of the Caribbean. Increasing numbers of countries are now opening up to vaccinated travellers without requiring quarantine; it is expected that Montserrat and Cayman Islands will join these shortly.

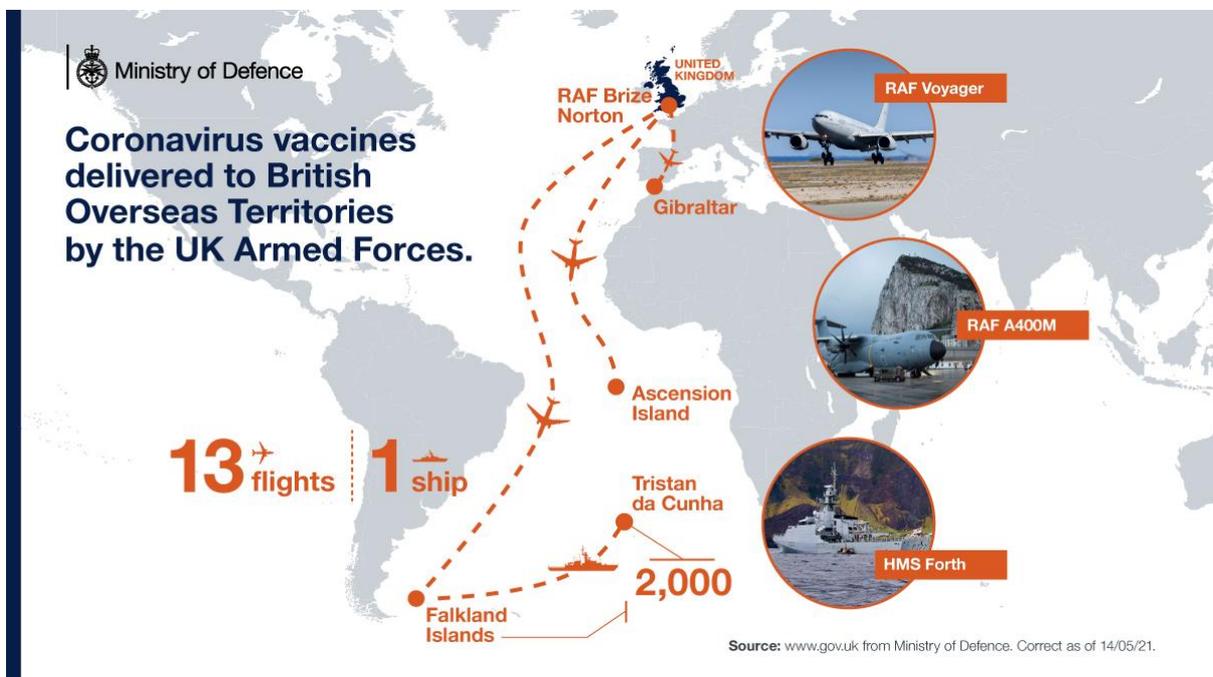


Country	Entry Conditions	Position on UK List
Anguilla	<ul style="list-style-type: none"> • Pre-authorized entry only • All travellers to have negative PCR test taken 3-5 days before arrival and a test on arrival • All vaccinated visitors to self-isolate for 7 days upon arrival • All unvaccinated visitors to self-isolate for 10-14 days upon arrival 	Green

Bermuda	<ul style="list-style-type: none"> • Pre-authorized entry only • All travellers to have negative PCR test taken 4 days before arrival • Vaccinated travellers to quarantine until a negative PCR arrival test • All unvaccinated visitors to quarantine for 14 days upon arrival 	Green
British Virgin Islands	<ul style="list-style-type: none"> • Pre-authorized entry only: cost of Authorisation Certificates vary according to vaccination status, \$35-\$175 • Vaccinated travellers (except from India and Brazil) permitted to enter without further testing, subject to negative PCR test within 5 days before arrival • Partially vaccinated travellers, negative PCR test 3-5 days before arrival; negative PCR test upon arrival; 4-day quarantine; PCR test day 4 • Unvaccinated travellers, negative PCR test 3-5 days before arrival; negative PCR test upon arrival; 7-day quarantine; PCR test day 7 	Green
Cayman Islands	<ul style="list-style-type: none"> • Pre-authorized entry only • Vaccinated travellers subject to 10 days quarantine • All unvaccinated visitors to quarantine for 14 days upon arrival 	Green
Gibraltar	<ul style="list-style-type: none"> • Entry conditions depend upon which Green, Amber, Red list countries traveller originates from within the last 10 days • Green: <ul style="list-style-type: none"> ○ Fully Vax – upload certificate; book Lateral Flow Test before arrival; second test day 5 ○ UnVax – LFT less than 48 hours before arrival; book LFT before arrival; third test day 5 • Amber: <ul style="list-style-type: none"> ○ Fully Vax - upload certificate; book LFT before arrival; second test day 5 ○ UnVax - take PCR test less than 48 hours before arrival; self-isolate 5 days; PCR test upon arrival and day 5 • Red: <ul style="list-style-type: none"> ○ Entry not permitted, unless traveller meets exemption categories 	Green

Montserrat	<ul style="list-style-type: none"> • Pre-authorized entry only • All travellers to have negative PCR test 5 days before arrival • Vaccinated travellers, 5 days self-isolation/quarantine, negative PCR test 3-4 days after arrival • Unvaccinated travellers, 14-day quarantine, negative PCR test before release 	Green
Pitcairn Islands	<ul style="list-style-type: none"> • Borders closed except to supply vessels 	Green
St Helena, Ascension, Tristan da Cunha	<ul style="list-style-type: none"> • All air arrivals (except from Ascension) required to have negative PCR test within 72 hours before arrival • Mandatory quarantine for 10 days • Testing on day of arrival and day 10 	Green
Turks and Caicos Islands	<ul style="list-style-type: none"> • Pre-authorized entry only • All travellers to have negative PCR test taken 5 days before arrival • Requires proof of health/travel insurance with COVID-19 cover and health screen questionnaire 	Green

Note: Where a traveller is vaccinated, proof is always required in the form of a Vaccination Certificate.



LATEST TRAVEL MARKET TRENDS

More than a year after COVID-19 shutdowns and restrictions started impacting countries around the world, the travel industry is definitely on the road to recovery, which, just like sporting events, is starting to learn how to live with the virus.

All indicators show that travel optimism is on the rise and Internet searches for travel (as reported by Google, Expedia and most other online travel agents) are rapidly rising. Some of the key trends spotted by Expedia are shown below.

Short lead time on planning trips...

Continuing the trend seen throughout much of last year, the majority of bookings are made 0-21 days before a trip is taken, as uncertainty around global travel saw travellers opt for more opportunistic, short-term trips closer to home. However, this is largely driven by the surge in domestic travel. For international travel, 30% of bookings are made 3 months or more before travel (typically trips to the Falklands are booked 6-9 months in advance). In the next few months there is likely to be a shift from short trips to longer more adventurous ones due to...



Making up for lost time with longer trips...

To make up for lost time, travellers are finally using their full vacation days and taking advantage of more flexible working conditions with “flexications” – a longer stay mixing work and play. This is resulting in longer trips as well as more long-haul travel. Several destinations are now offering “Digital Nomad” visas that allow travellers to stay in a country for up to one year for “flexications”. Looking at destinations in the LATAM region, interest is currently highest for travel to Mexico, with Cancun, Playa del Carmen and Mexico City topping the list of destinations being searched for and booked. But...

Domestic travel will remain strong...

Even with COVID-19 vaccine distribution ramping up, many travellers are continuing to take trips closer to home, and choosing car travel as their preferred mode of transportation. At least for now (most probably for the remainder of 2021), road trips will continue to eclipse air travel and other transportation methods. And finally...



Health and hygiene remains important...

Since the start of the pandemic, health and hygiene related factors have grown in importance for travellers. Analysis of guest review data shows a steep spike in consumers mentioning cleanliness in their reviews. Since March 2020 over one third of all guest reviews of accommodation properties mention cleanliness, further highlighting the importance put on cleaning. It is estimated that 4 in 5 travellers make accommodation decisions based on measures implemented following the pandemic.

FURTHER INFORMATION

Flights Update

At present, commercial airlinks with both Chile and Brazil will remain suspended until 1st October 2021.

Tourism Recovery Incentive Programme

TRIP is a domestic tourism stimulus scheme is now closed. More details about how this scheme operated be found at:

<https://www.fig.gov.fk/covid-19/tourismscheme/trip-scheme>

FIG Guidance and Information

For guidance and information for individual businesses operating in a COVID-19 environment, including restaurants, public houses and retail, as well as frequently asked questions see:

<https://fig.gov.fk/covid-19/>

<https://fig.gov.fk/covid-19/information/general-information>

<https://fig.gov.fk/covid-19/faq>