St Helena Government

Tourism Strategy and Delivery Plan

December 2025 - March 2031

St Helena Government

St Helena Island®
A breath of fresh air

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1. Executive summary

St Helena's tourism sector has made a strong recovery following the COVID-19 pandemic, with total arrivals in 2024/25 reaching 99% of pre-pandemic levels. Tourism is one of the island's most important economic sectors, supported by air access improvements, targeted UK Government Financial Support through the Tourism Development Programme (TDP), and renewed global interest in authentic, nature-based destinations.

Despite this progress, the sector continues to face significant structural challenges. Limited air connectivity, an unpredictable flight schedule, seasonal capacity constraints, a shortage of quality serviced accommodation, and declining local skills availability all restrict growth. The perception of St Helena as a "hard-to-plan" destination; combined with weather-related flight delays, continues to undermine confidence among travellers and travel trade partners.

St Helena, however, possesses a unique and highly marketable tourism offering; world-class hiking, exceptional marine life, globally significant conservation, a rich and diverse heritage, and a safe, uncrowded, off-the-beaten-path experience aligned with emerging travel trends. Substantial opportunities exist to grow niche markets including adventure tourism, conservation travel, Napoleonic and heritage tourism, voluntourism, and slowly increasing interest from the US market.

This strategy sets out a clear five-year vision to establish St Helena as a high-value, low-volume destination capable of attracting in excess of 6,000 arrivals annually by 2031. Its objectives focus on strengthening product quality, expanding capacity across the sector, increasing digital and trade-led marketing, improving service standards, and enabling private sector investment. Delivery will be guided through the TDP's three core pillars; Product, Marketing, and Capacity, and six thematic Tourism Pillars that define St Helena's core visitor offering.

Achieving sustainable growth will require continued investment, stronger public-private collaboration, improved air service certainty, and a coordinated effort to enhance the island's overall visitor experience. With focused implementation and strengthened industry capability, tourism can deliver long-term economic resilience and broaden opportunities for the people of St Helena.

2. Introduction

2.1. St Helena faces many of the challenges common to small islands: geographic isolation from major economies, diseconomies of scale, limited competition, a small population leading to capacity constraints, net out-migration; particularly among skilled, working-age residents, and a narrow economic base. Several of these issues have intensified post-COVID 19.

2.2. Tourism is recognised as a critical driver of future economic growth. Within two years of the airport opening, the sector became the island's largest revenue earner after UK aid. However, due to COVID 19-related border closures from March 2020 to October 2022, by March 2025 St Helena has had only four full years of air-access tourism since October 2017.

2.3. The Tourism Recovery Strategy (TRS) 2022/23-2024/25 was implemented to *'see a return to arrivals numbers experienced in 2019 (the island's best year for tourism), with appropriate tourism and hospitality services in place to meet the needs of visitors.'*

2.4. To deliver the Tourism Recovery Strategy, £500,000 was ring-fenced for to fund a Tourism Recovery Programme. 2023/24 - TDP1, 2024/25 – TDP2 and 2025/2026 – TDP3

2.5. Arrivals data for 2024/25 show a 99% return to 2019 levels, thus achieving the primary TRS objective, however, additional success metrics were less successful.

1. The goal of ensuring sufficient hospitality services are in place to meet demand feel short, due to a population decline of approximately 10% through emigration, including the loss of several key industry personnel, making recruitment and retention difficult.

2. Severe accommodation constraints continue, particularly in higher-quality serviced properties. Following a Tourism audit in October 2025, only 65 serviced rooms are available (60 en-suite), with risks of further decline due to limited succession planning.

3. Reduced activity provision, including the closure of one of the two dive operators in June 2025, limited availability of trained guides, and various key attractions not yet returning to pre-COVID 19 opening hours.

2.6. Three core tourism performance indicators show mixed results:

1. Arrivals: 99% recovery to pre-COVID 19 levels.

2. Average Daily Spend (ADS): Remains an estimate but spend per visit increased from £904 in 2019 to £978 in 2025.

3. Average Length of Stay (ALS): Declined from 12.6 nights (2019) to 11.9 nights (2025) for non-Saint leisure travellers.

2.7. St Helena's natural, cultural, and historical assets make it an appealing destination, but access remains the primary constraint:

2.8. Only one airline operates to the island, with a single weekly Johannesburg service and an additional seasonal mid-week Cape Town service (Dec–Feb).

2.9. The nearest alternative runway is 800 miles away, and weather-related delays increased in 2024/25. It is unknown if the 2024 season was an outlier or if more regular occurrence of flight delays is to become the norm.

2.10. The weekly flight cycle and required overnights in Johannesburg make a minimum trip length at least nine nights before accounting for travel to/from Europe.

2.11. Globally, the UNTWO declared '2024 marked the recovery of international tourism from the worst crisis in the sector's history'. St Helena, with its limited resources but with assistance from the UK Government, has managed to follow this trend.

3. The Aim of this Strategy

3.1. The aim of this plan is to build on the successes of the TDP1 to TDP3, continuing much of the work that began or was developed during the Tourism Recovery Strategy period, furthering work that:

1. improves and maintains key attractions and infrastructure.

2. promotes St Helena to consumers and the travel trade.

3. helps ensure the private and public sectors are adequately staffed and skilled in delivering tourism and hospitality services.

3.2. The Five-Year Vision is to: Transform St Helena into a recognised medium-to-high-value, low-volume destination with year-round appeal, improved service standards, and sufficient infrastructure to support 6000 annual arrivals.

4. Strategic Context

4.1. This plan provides direction for St Helena Government's Tourism function from December 2025 to March 2031.

4.2. The Tourism Recovery Strategy's key objective was to return St Helena's arrival numbers to pre-COVID 19 levels. This was achieved in financial year 2024-2025, however, pure leisure tourist arrivals were slightly below their peak at the same period.

4.3. The Tourism function sits within SHG's Economic Development Portfolio who work to deliver six strategic objectives:

1. An open and accessible island — Open and accessible for people and culture, capital and finance
2. A productive island — Increase productivity, labour force participation, and capital investment
3. A breath of fresh air — Preserve and celebrate what makes us unique
4. A united island — Ensure everyone shares in the benefit
5. Effective infrastructure — Growth is supported by better infrastructure
6. Better government — Make St Helena Government a facilitator of business

4.4. This plan includes air arrivals forecasting data by Aquila Aviation (2024) and data collected by the St Helena Government's Statistics Office.

4.5. The strategy was informed by stakeholder consultation

1. Tourism Operators
2. DMCs
3. St Helena National Trust
4. St Helena Yacht Club
5. Accommodation Providers
6. Guides
7. Retail and Hospitality Businesses
8. Marine and Conservation Stakeholders
9. Chamber of Commerce

5. Five-Year Vision and Objectives

5.1. Vision Statement: By 2031, St Helena Island will be

- Recognised as one of the world's most authentic island destinations supported by strong public-private collaboration and engaged local community that recognises tourism as a key contributor to economic development.
- Attract 6325 arrivals., including high value leisure visitors seeking meaningful experiences in history and heritage, culture, marine, conservation, hiking and adventure.
- Tourism will continue to be major contribution towards GDP; however, measurable growth will be achieved across:
  - Total Arrivals,
  - Average Daily Spend,
  - Average Total Length of Stay.
- The private sector will invest in increased fully serviced accommodation capacity. This will be through re-opening of closed properties, upgrading self-catered rentals into serviced B&B operations and expanding existing capacity.

5.2. Primary and Sub-Objectives: The Tourism Strategy and Delivery Plan 2025-2026 details a primary objective and eight sub-objectives.

- Primary objective is to: "increase total leisure arrivals by 4% per year compounded from 2024/25."
- Eight sub objectives support the primary objective, they are:
  1. Develop and diversify our tourism product.
  2. Strengthen and expand our tourism services.
  3. Strengthen tourism industry collaboration through establishment of a representative industry body and regular public-private engagement.
  4. Optimise accommodation capacity.
  5. Increase destination awareness through targeted marketing campaigns; significantly improving digital marketing.
  6. Increase yield from key markets by increasing the number of tour operators selling St Helena and improve conversion rates.
  7. Attract more 'off season' visitors to St Helena in the shoulder periods and 'winter' months.
  8. Develop the skills of those that work in the tourism and hospitality sectors in order to improve the St Helena experience and increase visitor satisfaction.

6. Delivery

6.1. These objectives will continue to be delivered through three main areas of focus that support tourism development:

1. **Product:** Product development and infrastructure improvements.
2. **Marketing:** Marketing, promotion and PR
3. **Capacity:** Staffing, training, up-skilling and institutional arrangements.

6.2. The delivery of these three main areas of focus is principally the responsibility of the Head of Tourism, but departmental operations are overseen by

1. Product – Product Manager
2. Marketing – Senior Marketing Manager or Head of Communications
3. Capacity – Tourism Manager.

7. Strategy Delivery

Overarching Strategies and Plans	Focus Areas	Delivery: Plans and Partnerships	Sub-objectives
SHG's 10 Year Plan Sustainable Economic Development Plan 2018 - 2028 SHG's Vision and Strategy Sustainable Economic Development Strategy 2023 - 2033	**PRODUCT:** Product Development Infrastructure Improvements	Investment Strategy for Tourism & Hospitality Sector Infrastructure Strategy PB Walks Management Heritage Grant Scheme	*Sub-objective 1:* Develop and diversify our tourism product *Sub-objective 4:* Optimise accommodation capacity.
	MARKETING: Marketing Promotion Public relations	Strategy, action plans and implementation of: Marketing & Comms Digital Campaigns B2B & B2C Events Tour operator training PR agencies coordination Alignment and audit of brand Marketing collateral	*Sub-objective 5:* Increase destination awareness through targeted marketing campaigns; significantly improving digital marketing campaigns *Sub-objective 6:* Increase yeild from key markets by increasing the number of tour operators selling St Helena and improve conversion rates *Sub-objective 7:* Attract more 'off season' visitors to St Helena in the shoulder periods and 'winter' months
Primary Objective Increase leisure arrivals by 4% (2026/2027 vs 2025/2026)	**CAPACITY:** Staffing Training Up-skilling Institutional arrangements Facilitating private sector growth	Tourism staff Training for hospitality and tour guide Partnerships: Airport, SHNT, BoSH, LAAC, SNCG, Mantis, Solomons, etc. SHG: Port Control, EMD, Property, Immigration, etc. Event support and facilitation Tour operator relationship management Diaspora initiative	*Sub-objective 2:* Strengthen and expand our tourism services *Sub-objective 3:* Strengthen tourism industry collaboration through establishment of a representative industry body and regular public-private engagement. *Sub-objective 8:* Develop the skills of those that work in the tourism and hospitality sectors in order to improve the St Helena experience and increase visitor satisfaction

8. Tracking Performance

Sub-objective 1: Develop and diversify our tourism product

Sub-objective 2: Strengthen and expand our tourism services

Sub-objective 3: Strengthen tourism industry collaboration through establishment of a representative industry body and regular public-private engagement.

Sub-objective 4: Optimise accommodation capacity

Sub-objective 5: Increase destination awareness through targeted marketing campaigns; significantly improving digital marketing campaigns

Sub-objective 6: Increase yeild from key markets by increasing the number of tour operators selling St Helena and improve conversion rates

Sub-objective 7: Attract more 'off season' visitors to St Helena in the shoulder periods and 'winter' months

Sub-objective 8: Develop the skills of those that work in the tourism and hospitality sectors in order to improve the St Helena experience and increase visitor satisfaction

	Measurables
PRODUCT: Product Development Infrastructure Improvements	Tourism visitor exit survey Income and expenditure details recorded and compared on year-on-year basis Business directory updated (number of rooms, service providers, tour guides, taxis, eateries, DMCs, etc.) Business surveys (SHG statistics) Projects completed (TDP Product)
MARKETING: Marketing Promotion Public relations	Agency reports - positive news stories KPI's on marketing plans Website and social media metrics Campaigns VFM/EAV Successful events Successful FAM trips Number of tour operators engaged, trained and conversion rates Comprehensive, up-to-date information available across all platforms
CAPACITY: Staffing Training Up-skilling Institutional arrangements Facilitating private sector growth	Visitor satisfaction scores Enquiries answered and followed-up Tourist walk-in stats VIS/Tourist Office scores through exit survey Staff progress through PPMP Hospitality training programmes delivered Number of guides trained or accredited Participation in sector forum/feedback sessions Tourism Association holds regular meetings

Targets by end of 2031

1. 2030/2031 leisure arrivals are 21% higher than 2024/2025 arrivals
2. Commercially available 3 and 7 day itineraries for each of the six pillars of tourism
3. 50 additional jobs created within the tourism industry
4. Suitably align accommodation offering with international standards and price points. Increase registered and graded serviced room offering to 90 rooms
5. Annual calendar of events covering each of the six pillars of tourism
6. Increase DMC providers on the island to 5 who manage and develop upstream relationships with a network of 60 tour operators actively selling the island
7. Reduce peak-season dependency from 55% to 45% of annual arrivals
8. Achieve 85% visitor satisfaction rating

9. Travel Analysis

9.1. Arrivals to St Helena

1. Commercial flights to St Helena began in October 2017. What was previously a 5-day journey by sea became a 6-hour flight from Johannesburg. After the airport opened arrivals increased steadily, prompting demand for different tourism and hospitality services.
2. With the global spread of COVID 19, in March 2020 South Africa closed its airspace halting commercial flights to the island. St Helena instituted stringent travel restrictions and quarantine protocols. Visitor arrivals decreased dramatically over the following two years, with almost no leisure tourists and reduced travel from visiting friends and relatives (VFR).
3. In August 2022 the island's COVID 19 restrictions were lifted. In October 2022 key tourism businesses and regular commercial flights resumed.
4. Table 1 – Arrival Numbers FY 2018/2019 – FY 2024/2025 compares arrivals figures for financial years 2018/19 to 2024/25. In the column on the far right, total arrivals for each FY is expressed as a percentage of 2018/19 arrivals.
5. Table 2 shows total leisure arrivals each month, clearly indicating distinct seasonality with December to March being the period of peak demand. This is when St Helena has its best weather and the island experiences whale shark aggregations. However, weather patterns are becoming less predictable, and the frequency of weather-related flight delays is becoming less predictable.
6. At the start of 2024/25 bookings for season were very slow to pick up, prompting Airlink to release their lowest fares to incentivise booking. Bookings improved, with total arrivals for the period October 2024 to January 2025 being better than that period in 2018/19.
7. According to SHG Stats, year-on-year Saints are staying longer (more than 3 weeks on average).

	April	May	June	July	August	September	October	November	December	January	February	March	Total Arrivals FY	Recovery Percentage
FY 18/19	412	392	285	238	252	272	310	307	782	793	458	590	5091	
FY 19/20	459	244	263	258	322	328	236	430	754	576	675	230	4775	94%
FY 20/21	60	51	8	65	5	97	106	84	110	104	109	93	892	18%
FY 21/22	56	160	163	11	229	255	190	389	155	272	168	293	2341	46%
FY 22/23	155	178	159	259	181	208	235	360	500	601	393	377	3606	71%
FY 23/24	323	287	231	259	193	411	289	333	641	625	458	314	4364	86%
FY 24/25	352	274	196	238	203	315	328	422	720	756	655	549	5008	99%
FY 25/26	448	384	279	262	320	185	199	212						

Table 1: Arrival numbers FY 2018/2019 – FY 2024/2025

Arrivals per month

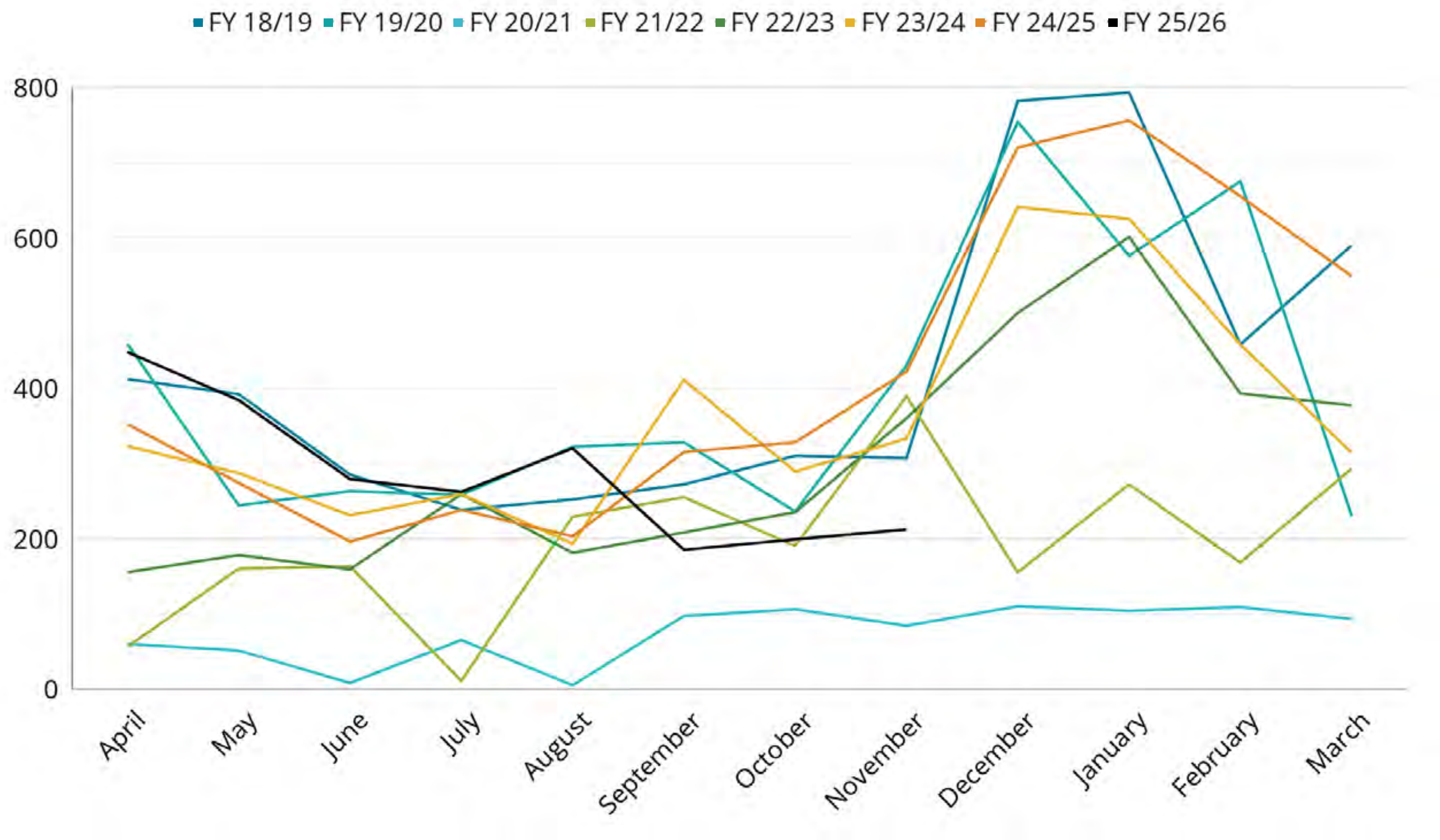


Figure 1: Arrivals to St Helena FY 2018/19 to 2024/2025

	April	May	June	July	August	September	October	November	December	January	February	March	Total
FY 19/20	143	64	59	44	36	109	48	113	142	178	250	52	1238
FY 20/21	1	0	0	0	1	0	2	4	6	2	0	1	17
FY 21/22	1	1	2	0	1	2	5	12	11	16	6	15	72
FY 22/23	13	4	8	8	15	9	23	39	51	101	136	131	538
FY 23/24	136	56	32	49	32	73	21	70	99	146	178	58	950
FY 24/25	95	37	41	23	24	27	91	104	111	208	161	135	1057

Table 2: Pure Tourist/Leisure Arrivals (excludes VFR)

9.2. Visitor Spend

1. Pre-pandemic, the provision of services to visitors had grown to become St Helena's biggest export sector. In FY 2018/19 the export of services (visitation expenses to tourists and non-residents) was 11.9% of £47.7m (total receipts), the second biggest contribution after UK financial and capital aid (83.1%). Visitor expenditure has increased year-on-year since the island reopened.
2. Accurately measuring visitor expenditure is widely recognised across the tourism industry as a complex challenge. On St Helena, limited resources and the absence of a mandatory tourism reporting system mean that annual visitor expenditure estimates are derived solely from visitor exit surveys. While these surveys provide a useful indication of spending patterns, a more robust and comprehensive methodology is required. Strengthening the measurement of visitor expenditure will improve the monitoring and reporting of Average Daily Spend, a key indicator of sustainable tourism growth and the economic value generated by the sector.

	2019	2020	2021	2022	2023	2024
VFR	1.9 – 2.6	1.7 – 2.3	1.3 – 1.7	2.4 – 3.3	2 – 2.8	2.2 – 3
Leisure	1.9 – 2.5	0.9 – 1.2	0.2 – 0.2	0.7 – 0.9	1.4 – 2	1.6 – 2.1
Other	0.8 – 1.1	0.6 – 0.9	0.6 – 0.8	0.7 - 1	1.1 – 1.7	1.1 – 1.6
Total	**4.6 – 6.3**	**3.3 – 4.5**	**2 – 2.7**	**3.8 – 5.3**	**4.6 – 6.4**	**4.9 – 6.7**

Table 3: Annual Estimated Visitor Expenditure £ million

9.3. Source Markets

Table 4 and Figure 2 show the main nationalities (source markets) travelling to St Helena. Historically, source markets have led with the UK, followed by South Africa, then French and other European countries. In 2024/2025 there has been a significant increase in the number of American leisure tourists. This can likely be attributed to new direct flight routes from the USA into South Africa.

	2018/2019	2023/2024	2024/2025	% Growth
ARR.AIR.LEISURE.UK	471	273	278	-41%
ARR.AIR.LEISURE.STH	1147	1164	872	-24%
ARR.AIR.LEISURE.RSA	248	168	242	-2%
ARR.AIR.LEISURE.FRANCE	54	118	82	52%
ARR.AIR.LEISURE.GERMAN	40	68	62	55%
ARR.AIR.LEISURE.EUROPE	156	143	127	-19%
ARR.AIR.LEISURE.ASIA	55	27	42	-24%
ARR.AIR.LEISURE.AMERICAS	90	105	152	69%
ARR.AIR.LEISURE.OTHERNAT	18	17	21	17%

Table 4: Nationalities of Leisure Arrivals.

Note that 2024/25 has incomplete data due to changes made in data collection and recording and the UK Leisure and STH leisure figures do not complete the last 3 months of the year.

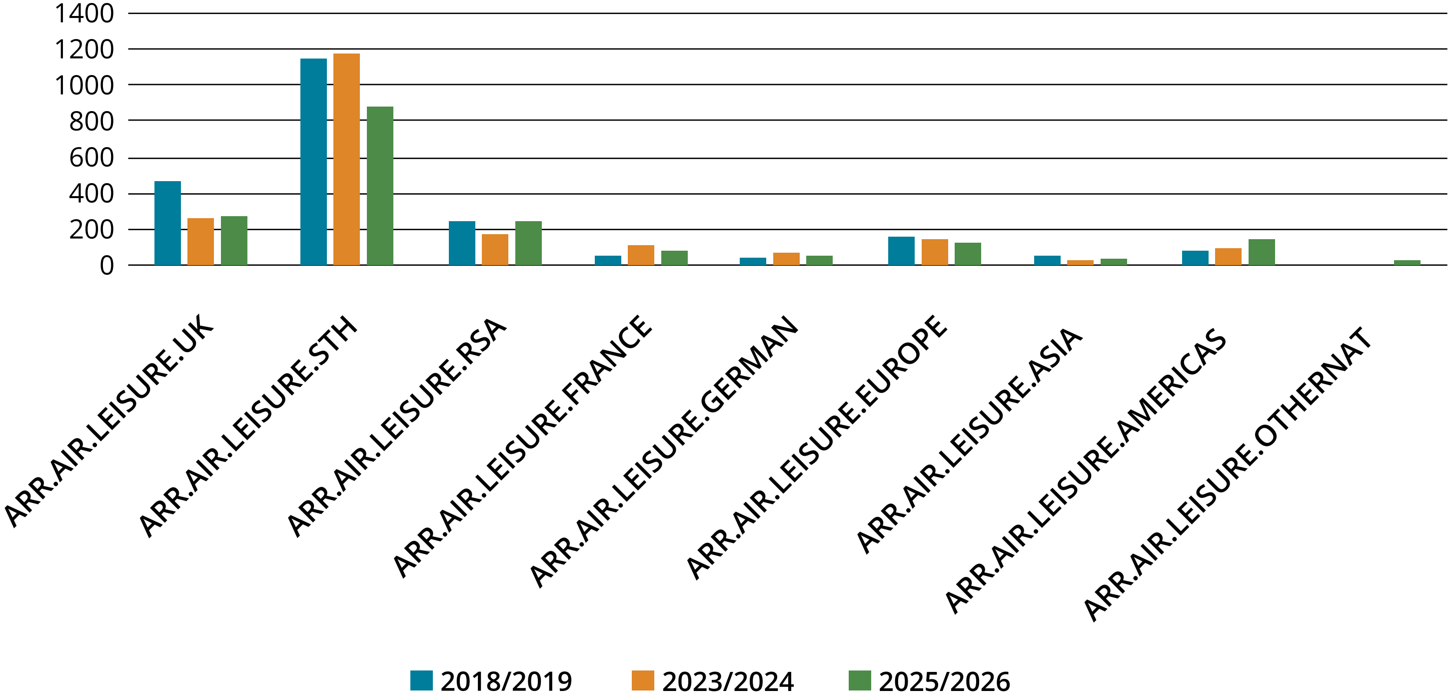


Figure 2: Nationalities of Leisure Arrivals

9.4. Flight Reliability and Resilience

1. St Helena's air service has demonstrated continued improvement in reliability, although the island's remote location and lack of an alternative runway mean that operational resilience remains an important consideration for the tourism sector.
2. In 2024, 18 of the 78 scheduled flights (23%) experienced delays. While this was the highest annual rate recorded since the airport opened, the longer-term average delay rate from 2017 to 2024 was 13%. In 2025, the delay rate to date had reduced to 11%, indicating a significant improvement from the previous year.
3. The majority of delays are managed within the existing operational framework. However, where weather factors prevent an aircraft from landing or departing, the absence of an alternative runway can result in longer disruption than would typically be experienced at destinations with multiple airport options. Delays to St Helena services can, in some circumstances, extend to between 24 and 72 hours.
4. Flight reliability is therefore an important consideration for tour operators and visitors when planning travel to St Helena. Continued work to provide clear information to passengers and the tourism trade will support confidence in the destination and the continued growth of the visitor economy.

Table 5 and Figure 3 illustrate the annual flight delay rates and the longer-term trend.

Year	No. of Flights	Weather Delays	%
2017	12	1	8%
2018	55	8	15%
2019	81	1	1%
2020	32	3	9%
2021	28	5	18%
2022	48	2	4%
2023	70	12	17%
2024	78	18	23%
2025	56	6	11%

Table 5: Flight delays in FY 2024/25

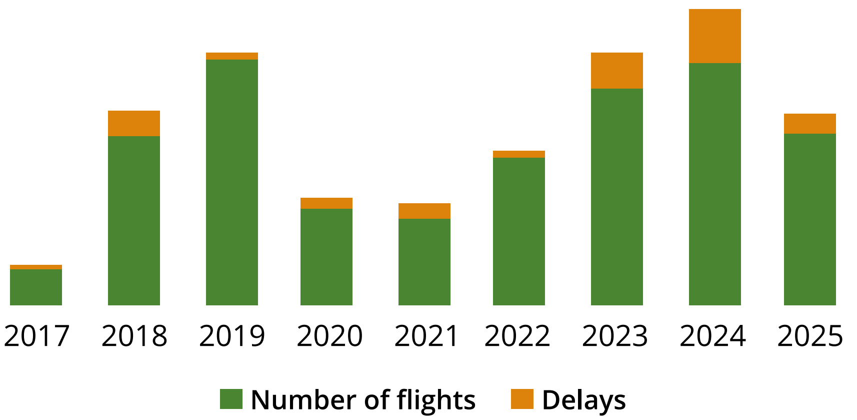


Figure 3: Weather Delays since the Airport opened in 2017

10. Arrival Forecasts 2025-2031

10.1. All data and forecasting analysis uses arrival statistics; arrivals being the clearest metric in illustrating flows to the island.

10.2. Utilising the Aquila Aviation Report 2024 (Annex A: Aquila, 2024) that primarily focuses on statistical data for arrivals on scheduled air services from Cape Town and Johannesburg it can be assumed that:

a) Foreign leisure travel will grow at the rate that occurred between 2018/19 and 2019/20 (4%)

b) Saints' leisure travel to be essentially static, as has been observed from 2018/19

c) Non-leisure traffic – returning residents, business and transit – to have zero growth over the forecast period

10.3. The forecasts are considered the best estimate of demand, however, there are several caveats to the data provided:

- There is a limited data base of travel demand – due to the limited time since operations commenced and the impact of the COVID 19 pandemic on travel in 2020-2022.
- Significant annual variation in segmentation analysis makes the outputs subject to great uncertainty.
- Forward booking data does not reflect the final booking patterns. Nevertheless, it is an element in determining the future schedule, which influences demand.
- The point of origin – Johannesburg or Cape Town – and the availability of twice weekly flights influences demand. Tour operators have indicated a preference for Cape Town and twice weekly flights during the peak leisure travel season of December through February.
- Small changes in arrivals, both positive and negative, have a disproportionately large effect on a small market such as St Helena.

10.4. The Aquila Report was written in 2024 and the actual arrivals data for 2024/2025 were higher than forecasted. However, the assumptions included in the Aquila report (8.2 above) are considered solid and remain the base for forecast assumptions.

11. Visitor Profiles

11.1. Historic marketing efforts targeted the well-travelled, soft adventurers with primary focal points being diving, Napoleonic history, birds/nature offering and history.

11.2. Typically, tourists are 40 to 59 years but can be older, particularly on group trips. They are generally Generation X, working professionals or time-rich retirees that usually have higher disposable income to afford the cost of travelling to St Helena, c. £4-5K for a week (inclusive of flights, transport, accommodation, dining and range of activities) if travelling from UK or Europe.

11.3. Visitors to the island are generally well travelled and value unique experiences that are not available to everyone.

11.4. The Travel Industry is segmented into 3 categories of tourists – Free Independent Travellers (FIT), Group Travel and Visiting Friends and Relatives (VFR). St Helena has focused primarily on the Group Market, utilising Tour Operators as the conduit to the market.

11.5. Free Independent Travellers (FIT) tend to travel in pairs, or alone. Travel data for FIT is limited, however, limited digital presence on mainstream digital platforms will continue to restrict access to FIT markets.

11.6. Discounting VFR markets, St Helena has little family or multigenerational group travel, particularly few families with children.

11.7. Main source markets are the UK, followed by South Africa, France (Napoleonic interests), Germany and then other European countries. Post pandemic, new direct routes and airline code-sharing into Southern Africa, could be responsible for the increased interest from American tourists.

11.8. In 2024, tourism sought advice and researched ways to explore new markets. Increased search activity from new geographic markets is reflected in the tourism website's metrics and from enquiries at travel trade events (e.g. an increase from the South Asian market).

11.9. SHG's Public Relations representatives in the UK have access to a range of secondary data sources and in-depth expertise in conducting primary research, allowing them to make data-driven recommendations for marketing communications strategies and tactics. Based on previous analysis, the following groups have been identified:

- Adventure seekers
- History and culture vultures
- Sustainable tourism
- Voluntourism enthusiasts
- Bucket-list travellers

11.10. Within the audience segments listed above, it is understood that travellers will focus on once in a lifetime experiences and local connections over luxury hotels and products. They look for adventure, cultural immersion, heritage and history. Like the sustainable tourism and voluntourism enthusiasts, motivation for travel is based on ethical alignment and a product offering to match; hence, positive stories around conservation efforts, and the green and blue agenda are important. It is believed that young professionals and post-family groups will have disposable income to afford the return flight to St Helena, whilst being modest about hotel and guest house accommodation. St Helena's natural beauty and rich heritage is a key travel motivator and should be highlighted throughout content to attract these core audiences.

11.11. Key motivators to visit St Helena are often a personal connection, such as a family member being stationed here, or having visited. Special interests: although most tour operators outside diving do sell a general itinerary, most visitors express and interest in a specific area available through general itineraries that include history, Napoleonic interests, hiking and marine activities such as snorkelling, some scuba diving or swimming with whale sharks and birding. For many, the desire to visit a far-flung, off-the-beaten-track destination to tick a bucket list and have bragging rights is the sole reason to visit.

11.12. Lead times to book St Helena are usually over a year. It is likely that because of an improvement in connectivity and the recent development of online booking platforms (such as www.propertyfinder.sh and www.travelsthelena.com, and direct booking with Mantis St Helena/Accor), lead times for independent travellers seem to be decreasing, with evidence of solo travellers reacting and booking travel as a result of broader marketing initiatives (rather than targeted at specific groups). However, more evidence of this is needed.

11.13. Tour operators however usually need two years to market a package, three for cruise packages. Unavailability of 18-to-24-month flight schedule with certainty around Cape Town and midweek flights severely limits planning and the window to market trips.

11.14. The St Helena Tourism website is the leading site for tourists to find information (at least three times more traffic than other St Helena info sites). As of March 2025, Facebook boasted a following of 29,000 users, surpassing all other social media platforms managed by St Helena Tourism. This figure also far exceeds the follower counts of other St Helena-based social media accounts. However, to expand reach on social media platforms, paid campaigns are required

12. Travel Trends for 2025/26 and Onwards

12.1. Authentic travel (Source: Forbes) or **Experiential Travel** (McKinsey & Company). Connecting with local communities, learning about local cultures and harnessing authentic experiences are all key for travellers. Layered on top of these considerations is an emotional motivation too: travellers are craving authenticity more than ever, seeking a tranquil, local feel when abroad, rather than overcrowded 'Where's Wally?' beach scenes. Hilton's 2024 Trends Report finds the makeup of the modern traveller is evolving. It identifies an emerging theme of travellers prioritising experiences (85%), with many looking forward to exploring the unknown (81%), trying the local cuisine (64%) and learning about local customs and traditions (48%) when on holiday. And people are saving the pennies to make it happen, with more than half (52%) reducing spending in other areas to prioritise travel.

Relevance: A real focus on authentic, local experiences when in destination and the people that make them special.

12.2. Cultural immersion and authentic connections are top priorities (Source: FINN Partners Travel Insights). The pace of travel is slowing down as a growing number of travellers embrace the chance to more fully immerse themselves in their destination of choice. Immediately after the pandemic, travellers went in droves to the world's most iconic attractions. Perhaps the result of large crowds and long lines, we're starting to see a shift in how travellers experience a place, with a greater focus on spending time with local communities and travelling with intention. Destinations, attractions, and even hotels are embracing this shift, making it easier than ever for travellers to have more meaningful experiences.

Relevance: St Helena, a place that is far removed from mass tourism destinations is ideal for visitors that truly want to immerse themselves in local culture and create meaningful connections with locals.

12.3. Culinary experiences continue to drive booking decisions (FINN Partners Travel Insights). 2025 sees a fresh focus on local dishes. Travellers' search for more authentic local experiences is extending into their exploration of a destination's food scene. This will translate into a growing number of travellers seeking to taste the iconic dishes that can help them learn about – and connect with – local communities and cultures.

Relevance: A focus on the local food and drink culture of St Helena, from freshly caught fish for the Yacht Club fish fry, and St Helenian specialities and unique offerings such as afternoon tea at Farm Lodge, 'world's most remote' distillery's products, and some of the world's most expensive coffee.

12.4. Sports Tourism (Source: Conde Nast traveller Trends Report). Travellers of all types from solo to families are taking fandom out of the house and following a host of different sports in destinations across the world, planning holidays that hinge around seeing games, races, taking up challenges and other activities in locales, and extending trips on either side to see the sights too.

Relevance: With established quality operators providing services in scuba diving, there is the ability to grow the shoulder periods. With the abundance of world class hiking trails, growing mountain biking and water-sports interests, and future sporting events such as the 'world's most remote marathon' planned, St Helena provides the perfect backdrop to experience unique activities on one of the most remote islands in the world.

12.5. Wellness or Dopamine Travel (Source: Indy 100, DR Jo Gee). Stress is something that almost everyone can relate to, with 91% of adults reporting high or extreme levels of stress in 2023. Therefore, taking extra steps to look after our well-being is increasingly important, reinforced by the spike in wellness tourism. The change of scenery and adventurous nature of an active holiday can lead to an all-encompassing change in the dominant neurotransmitters in our brain, triggering releases of dopamine, as well as serotonin and adrenaline. It's this effect of certain holidays that has coined a new travel trend – Dopamine Travel.

Relevance: With an abundance of outdoor activities and natural beauty thanks to St Helena's diverse landscape it's a destination for an active holiday, alongside being immersed in nature.

12.6. Off the beaten track destinations (Source: Booking.com). In a shift from tourists taking the beaten path, travellers are opting for the road less travelled, exploring lesser-known corners of the world and seeking alternatives to popular

12. Travel Trends for 2025/26 and Onwards

destinations. The allure lies in escaping the crowds, with a growing preference for remote and more authentic experiences. Unearthing the charm of lesser-known cities and undiscovered regions within countries has become a prevailing trend, as the appeal of solitude and unique experiences surpasses the allure of mainstream travel destinations. (Audley Travel, 2023) Booking.com reported that 52% of consumers would prefer to venture off the beaten path and a third seek to travel with guests they have not previously met. 44% shared they are interested in visiting remote locations that tourists otherwise have limited access to.

Relevance: St Helena is the ultimate off the beaten track destination. As a small, remote island with its diverse range of attractions. Paradoxically, some of the challenges involved in travelling to St Helena are actually part of the attraction.

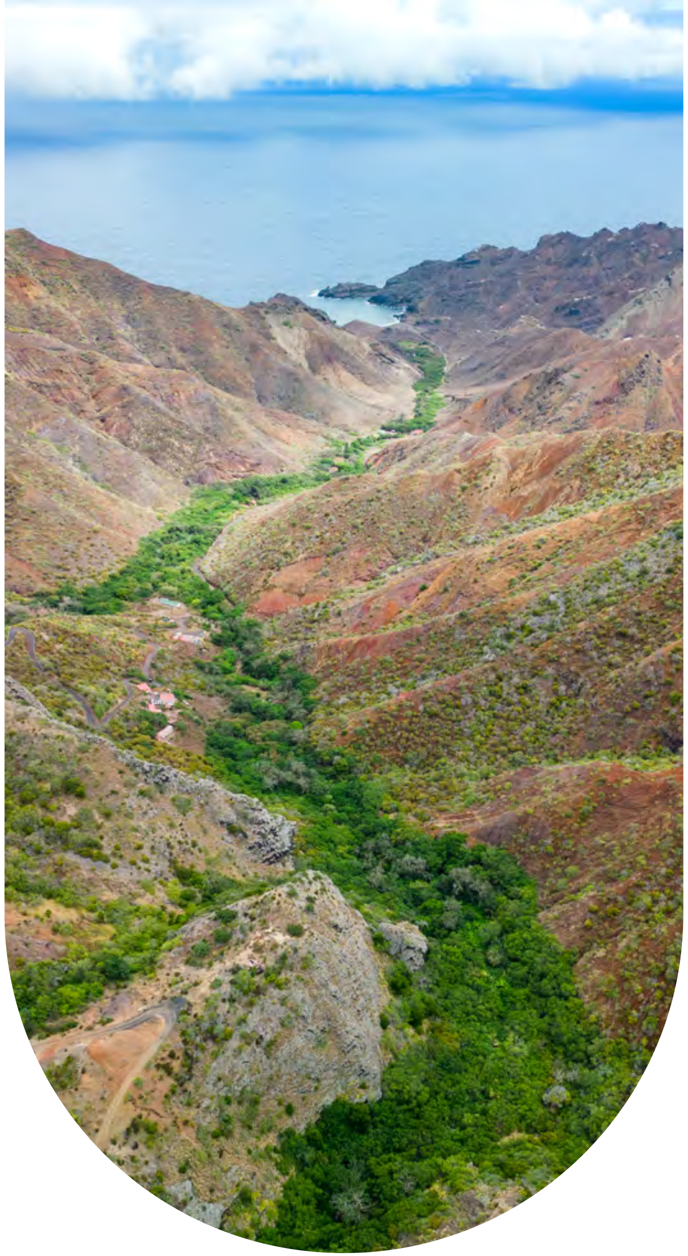
12.7. Solo Travel (Medium.com) has become a significant trend with growth expected to reach $10.2billion by 2033. Travellers are increasingly seeking unique and tailored experiences, and solo travel allows complete control over itineraries. Social media platforms showcase positive aspects of solo travellers, inspiring others to embark on their own adventure.

Relevance: The low crime rates, friendly locals and vetting process in place for all guides combine with the islands remote location to ensure St Helena is one of the safest places to travel.

13. Trade Competitor Summary

13.1. In early 2025, Finn Partners carried out a product audit for St Helena Tourism (Annex B: Trade Competitor Analysis) to compare tour operators featuring St Helena and its competitor destinations. Competitor/comparator destinations included the Galapagos Islands, Falkland Islands, Azores, Sao Tome & Principe and Reunion. South Africa was also included in the product audit to better understand the opportunities for twin-centre holidays.

13.2. The product audit included 129 tour operators in the UK, of which 35 featured St Helena, 78 featured Galapagos Islands, 49 featured Falkland Islands, 57 featured Azores, 29 featured Sao Tome & Principe and 27 featured Reunion. 116 featured South Africa, which presents a significant opportunity to support and partner with tour operators to feature St Helena and create a twin-centre product for those visiting South Africa to add St Helena to their itinerary.



14. SWOT Analysis

The main weaknesses and threats listed below identify areas for improvement to ensure tourism's development, as the strengths and opportunities below are areas to leverage and further develop. The identified weaknesses, threats, strengths and opportunities have defined the objectives of this strategic plan and the subsequent actions.

14.1. Strengths

1. St Helena is a subtropical British Overseas Territory free from extreme weather; it is safe and secure, with serious crime being a rarity. The island is politically stable, and is free from corruption, dangerous animals and malaria.
2. The island is English-speaking. The St Helena Pound has parity with the British Pound Sterling, and St Helena is on GMT year-round. Entry for a holiday is easy, with no visa requirements for most countries.
3. Saints are known for their warm welcome, tranquil lifestyle and unique heritage. With around 4,000 residents, everyone knows everyone in this tight-knit, friendly community and visitors quickly fall in love with the melting-pot, welcoming culture and cuisine.
4. As commercial flights to the island only started in 2017, St Helena is still one of the world's newest travel destinations.
5. St Helena is fortunate that it has a willing and viable air access partner, Airlink. During the pandemic Airlink negotiated commercial arrangements with numerous global airlines such as Emirates, Qatar, Delta, British Airways, KLM, United Airlines and Air France to improve connectivity to and from South Africa.
6. Airlink operates an aircraft (Embraer 190) that is fully optimised for St Helena: small enough to land and the 'right size' (available seats) to align with the current market size. The Embraer aircraft has significantly lower hourly operating costs than a Boeing 757 or similar-sized aircraft required for destinations further away, such as London (therefore ticket prices are lower, compared to a direct London service where ticket prices would be higher).
7. Bragging St Helena's exceptional remoteness creates a powerful sense of achievement for visitors, with the destination's bucket-list appeal and associated bragging rights attracting intrepid travellers who actively seek rare, authentic, and once-in-a-lifetime experiences.
8. The island is an adventurer's paradise, offering an expanded network of world class and internationally accredited nature hikes through unique habitats and ecosystems that boast plants and animals found nowhere else on Earth, with a backdrop of spectacular landscapes and vistas melding blues, greens and earthy volcanic hues.
9. With over 1/3 of the United Kingdoms total biodiversity being located on St Helena, the huge range of endemic species the island (over 500) is a Globally significant terrestrial and marine conservation area. A number of projects are ongoing, protecting and enhancing St Helena's globally important environment, both on land and in the ocean.
10. The island's category VI Marine Protected Area (which is nearly the size of France) is rich: Humpbacks, whale sharks, dolphins, endemic fish, seabirds, turtles, rays, shipwrecks and more. The diving is world class, so is the sports fishing, and the waters are warm with high visibility. In 2024 St Helena was designated a Hope Spot.
11. The island's location makes it an attractive and often necessary stopover for yachts and other vessels.
12. The island has more than 520 years of human history, spanning a wealth of diverse nautical and military legacies including the exiles of Napoleon, 6,000 Boer Prisoners of War and Prince Dinizulu. The East India Company, the island's role in the transatlantic slave trade and subsequent Liberated African history, and famous visitors like Darwin and Halley have also left unique imprints on the island. The island's excellent archives and museum allow visitors to immerse themselves in the unique history and heritage.
13. St Helena Coffee is highly prized; St Helena honey is pure and the tuna world-class. Jonathan the Tortoise holds two Guinness World Records, the world's oldest living land animal (his 190th was celebrated in 2022) and the oldest chelonian. The island's golf course, tap house and distillery carry the 'world's most remote' moniker.

14.2. Weaknesses

1. While the 'Brand St Helena' has been significantly developed post COVID 19, particularly within South African and UK markets, further work is required to strengthen brand traction, reach and recognition. Despite St Helena's varied and attractive range of tourism products, Napoleon, Jonathan and whale sharks remain amongst the island's most widely recognised attractions.
2. Historical publicity relating to 'wind shear' and perceptions of a 'dangerous airport' continue to influence perceptions among some members of the travel trade. Weather-related flight delays can reinforce these perceptions and may affect booking decisions. Continued communication around flight reliability, operational resilience and the overall visitor experience will be important in building confidence in the destination.
3. Seasonality continues to influence leisure travel, particularly among foreign (non-VFR) visitors. Cost is also a consideration for key segments, including VFR and South African residents, as well as for outbound travel by local residents.
4. The absence of a flight schedule extending two years or more, particularly with certainty around Cape Town and midweek services, limits the ability of the tourism industry and international travel trade to plan, package and market trips to St Helena sufficiently far in advance.
5. The requirement for an overnight stay in Johannesburg on both inbound and outbound journeys to intercontinental points of origin can add time and cost to the overall journey. Limited flight frequencies, typically based around a weekly service, also mean that a stand-alone holiday to St Helena generally requires a minimum stay of ten days. These factors need to be considered when developing and marketing packages to international markets.
6. On weekends that include an Ascension Island flight, hotel capacity can be affect as arriving passengers overlap departing passengers by one night.
7. The absence of a sheltered landing quay, the requirement to tender cruise passengers ashore and limited cruise tourism infrastructure present challenges in attracting and servicing cruise calls.
8. St Helena currently offers a limited range of quality tourist accommodation, with capacity particularly constrained within the higher-starred segment. There are approximately 65 serviced rooms (hotels and B&Bs) generally available, and several self-catered options are offered. Capacity is particularly important during January, February and March, when repeat dive groups can reduce availability for general leisure and business travellers and may limit the island's ability to accommodate additional groups and FIT bookings.
9. Investor interest in hospitality and tourism businesses has been limited. Increasing confidence in the sector and demonstrating the opportunities for sustainable tourism investment will therefore be important to future growth.
10. Tourism products, tours and experiences are not yet consistently presented online with clear pricing, availability and booking functionality. The increased use of AI in planning and booking holidays make online presence increasingly important.
11. Restaurants, eateries and entertainment venues remain limited in number and range. The number of dining options has decreased since 2020, with several popular restaurants and bars closing in 2024.
12. The supply and range of fresh, locally produced food is limited. Visitors can experience challenges relating to the availability, quality and cost of food, alongside a limited range of higher-end dining options. With global tourism increasingly focusing on culinary offering, concepts such as 'farm to table' and 'fish to fork' are currently under supplied on the St Helena market.
13. The Bank of St Helena's Tourism Card had almost 1,000 registrations by March 2025. However, only a limited number of businesses currently accept international credit cards, which remain the preferred payment method for many international visitors.
14. Despite training initiatives during the 'Tourism Recovery' period, the quality and consistency of tourism and hospitality services do not yet consistently meet expected international

standards. Pricing structures can also lack clarity. Local activity and transport providers continue to develop and test pricing, which can contribute to perceptions of St Helena as an expensive destination.

15. A shortage of skilled staff remains a constraint across the hospitality and tourism sectors. Recruitment, retention and workforce availability continue to affect hospitality, transport and tourism services. Structured hospitality training opportunities remain limited outside the short courses delivered through the TDP, highlighting the need for continued investment in skills development and career pathways.
16. The small number of local DMCs, quality tour guides and ground handlers can limit the sector's ability to meet the requirements and volume of business generated by international tour operators.
17. While the number of tour operators actively selling St Helena has increased during the period 2022 to 2024, it can take up to two years for operators to add St Helena to their portfolios and generate their first sale.
18. Capacity within the Tourism Function has at times limited the ability to develop and deliver some marketing initiatives. There have been occasions when the marketing team has been under pressure to deliver scheduled campaigns, reducing its ability to respond quickly to emerging opportunities. Changes in senior marketing and tourism leadership during 2024 and 2025 also affected engagement with the travel trade, including post-show follow-up and product training.
19. With a small number of DMCs and no dedicated sales function within St Helena Tourism, there is an opportunity to strengthen the process for converting increasing tour operator interest; much of which is generated through international trade shows, into confirmed business.
20. The St Helena Tourism Association has remained largely inactive, including during the period before the pandemic, while there is currently no St Helena Tourist Board providing dedicated oversight and guidance. The ESH Board, which previously provided this function, ceased operating on 31 March 2021.
21. The Government managed yacht mooring field was decommissioned in 2024 and the lack of available moorings for hire could result in yachts choosing not to stop in at St Helena.
22. Due to a range of historical factors, local confidence in the opportunities and benefits associated with the tourism sector remains relatively low.

14.3. Opportunities

1. St Helena is still a new destination. There is demand for visiting the island. Tour operators are looking for something 'new', something 'off the beaten track', the next 'undiscovered location', and 'a destination with a difference'. Media interest remains solid, but new product must be developed to create attractive features and engaging digital content.
2. St Helena has the potential to become a medium-to-high-value, low-volume destination. The island does not need that many visitors to make tourism work.
3. Post COVID 19, new commercial air routes opened into South Africa, notably from the USA, and codesharing between leading airlines and Airlink has developed. St Helena can capitalise on these new routes and markets.
4. There is potential to develop twin-centre holidays and bolt-ons to a South African experience with a range of tour operators.
5. St Helena has grown and developed partnerships, memberships and associations. These relationships provide professional guidance and recommendations to support tourism development; facilitate networking and increase contacts; support sales, PR and marketing efforts; and generally raised the profile of the destination. These include: Airlink Marketing, Representation Plus (UK based PR and marketing), Big Ambitions (SA based PR and marketing), the Africa Hub and Online Travel Training (trade training platforms), , the African Tourism and Travel Association (ATTA), the South African Travel and Tourism Services Association (SATSA), Wesgro (the leading trade, tourism and promotional agency for the Western Cape), and Africa's Eden (destination marketing).
6. There is an unexplored and under-targeted sector of Diaspora or people of Saint heritage. Communities exist in the Western Cape of South African, United Kingdon, Germany, Australia and the USA.
7. Improved telecommunications and connectivity through the Equiano fibre optic internet cable has significantly improved the creative use of the internet and social media, improving the island's position in the global marketplace. There is huge scope to improve St Helena's digital/ online presence, but this will require additional marketing budget and resources.
8. There have been significant tourism infrastructure improvements and maintenance works under the TDP, and through EDIP funding. The island's unique built heritage is a key attraction.
9. The island's adventure offering can be expanded, with little required in terms of infrastructure development to attract hard adventure and sports enthusiasts for marathons, ultra marathons, ocean swimming, triathlons, the Jacob's Ladder climb and other fitness challenges. Diving season has been extended into April. However, hiking is year-round, and dive season could be further extended from November-June.
10. St Helena could develop niche markets such as historical and remembrance tourism (covering the liberated african legacy, Boer and Zulu legacies), destination weddings, astrotourism (dark skies), photography, along with opportunities for MICE (Meetings, Incentives, Conferences and Events) and SAVE (Scientific, Academic, Volunteer, Educational) tourism.
11. Private sector individuals and businesses could capitalise on the opportunities available within the sector and generate additional income. Notably taking advantage of a variety of training, upskilling and accreditation courses offered by Tourism under the TDP. And, to create products and services to meet the seasonal demand, such as bagged coffee and 'Uniquely Saint' souvenirs.
12. Many tourist destinations have a tourism levy, a tourism tax raises funds to often mitigate the increased demand on infrastructure and public services, to address the environmental and sustainable impact of tourism and to ensure that the tax burden is split equitably. Tourist taxes are also used as a tool to regulate the flow and behaviour of tourists, to provide funds for specific events or projects, used to promote and market the destination or used to diversify the economy in areas reliant on tourism. The levy is charged to the consumer for the use of specific tourism services: accommodation, car rental, tours, access to attractions, etc. South Africa's tourism levy is 1%. A tourism levy could,

for example, boost the destination's marketing budget.

13. Leverage St Helena's position as a historical crossroads connecting Napoleonic, Boer, Liberated African and Zulu heritage narratives.

14.4. Threats

1. According to the latest World Tourism Barometer from UN Tourism, an estimated 1.4 billion tourists travelled internationally in 2024, indicating a virtual recovery (99%) of pre-pandemic levels. However, tourism growth globally and locally may be influenced by global conflict, further inflation and price increases, particularly in fuel and food. While we have now learnt to live with COVID-19, future pandemics could also prompt further travel restrictions.
2. While tourism has largely recovered on St Helena, continued growth beyond recovery levels will be important to support the long-term sustainability of the island's tourism and hospitality sectors. Continued investment and incentives for new business development and product diversification will also be important to strengthen the island's tourism offer and marketability.
3. While there is interest from tour operators, St Helena can be challenging to incorporate into packages given the relatively small number of clients compared with their primary business markets, as well as the limited number of local DMCs and ground handlers available to plan, cost and deliver itineraries.
4. Selling St Helena takes time. Some of the international tour operators selling St Helena pre-pandemic did not resume, while others reopened and subsequently ceased trading. Tour operators are generally more confident in selling St Helena once they have visited the destination. Engaging these operators, following up on their interest (usually generated at trade shows) and inviting operators to visit can take over a year, with an additional year or more often required to add St Helena to their portfolios and subsequently market and sell the destination.
5. The Tourism Development Fund (£500K a year for three years) was critical in supporting the island's recovery from the impacts of COVID-19. Continued access to funding to promote the island, support product development and maintain the capacity required to deliver the tourism function will be important in sustaining tourism growth.
6. The total marketing budget is small compared with that of alternative destinations, particularly as St Helena continues to develop as a destination. Digital marketing efforts have grown organically but have begun to plateau, with additional budget required to significantly expand reach through paid-for campaigns.
7. 2024 was just the fourth full year of air-access-based tourism. There is still further work required to undertake market research, such as demand forecasting and the identification of new and profitable segments, alongside the continued development of the 'Destination Brand St Helena'.
8. Due to the complexities of St Helena's air access requirements, the island has limited options when it comes to flights to and from the island. The number of airlines with suitable aircraft available and a willingness to operate to St Helena is limited, a situation that is unlikely to change significantly in the short term.
9. Limited investor interest in developing the tourism and hospitality sectors, combined with a lack of or inadequate training opportunities, could place additional pressure on an existing island-wide skills shortage.
10. Accelerating emigration of the island's working-age population for employment opportunities overseas could widen skills gaps and contribute to the 'brain drain'. The island's working-age population has already reduced and may increasingly place pressure on the availability of staff and services across both the public and private sectors.
11. In 2024/25 there were just 3 local Destination Management Companies (DMCs) - Aaron's Adventure Tours, Island Images and Dive St Helena. With the closure of dive operator Sub Tropic Adventures, St Helena currently has only 1 dive operator. St Helena Tourism is the island's Destination Marketing Organisation (DMO) and currently also undertakes some DMC functions to support the sector.
12. Availability of tours and activities fluctuates, with some only available after regular working hours or at weekends, as guides are in full-time employment. Despite tour guide training courses, there remains an opportunity to

increase supply to support demand during the season and on cruise ship days.

13. The continued decline in room inventory, and the loss of any of the higher-capacity accommodations (Mantis, Blue Lantern and Williams Estate), could limit the island's ability to attract group business.
14. If there is no significant increase in the number of quality serviced rooms and suitable tourist accommodation, there may be a growing gap between the number of available airline seats and available beds, which could constrain visitor growth. A lack of succession planning in most accommodation organisations also increases the vulnerability of the sector over the longer term.
15. The continued limited availability of local produce, including fruit, vegetables, fish, meat and secondary products, together with limited menu offerings, could affect the attractiveness and marketability of the island and does not align fully with the destination's ideal high-value, low-volume marketing objectives.
16. The stewardship of St Helena's natural resources, both on land and in the ocean, needs to remain a primary focus. The extended closure of the Peaks National Park and Cloud Forest illustrates the fragility of the island's natural assets and highlights the importance of protecting and sustainably managing these resources, which are fundamental to St Helena's tourism offer. Prolonged closure or loss of access to key natural attractions could have a direct impact on the visitor experience and the island's ability to market its nature-based tourism products.
17. It can be challenging to actively market St Helena to cruise ships, with the focus currently on smaller expedition vessels. This reflects a combination of limited cruise infrastructure, principally the absence of a jetty, and the operational considerations associated with landing passengers. St Helena has infrastructure constraints where higher-volume tourism is concerned; the number of buses, taxis and accredited guides, the limited road network, the ability to accept varied currencies and the availability of card payments can all influence the total spend of cruise ship passengers. Lead times to book routes for most cruise lines are 18 months to 3 years. Reputational damage caused by a scheduled ship being unable to disembark passengers, or passengers being unable to re-embark their ship from St Helena would be significant.
18. The yacht mooring field (23 'parking spaces') was condemned in January 2024 and is due to be removed through funding by the MCA. An estimated £250,000 a year is generated by yacht arrivals. The availability of adequate facilities for yacht visitors on the wharf is important to maintaining annual rallies calling at St Helena, supporting the Cape to St Helena race and strengthening the island's reputation as a welcoming stopover within this important visitor segment.
19. While the island has a variety of products with cross-sectional appeal, continued investment in key attractions and the general maintenance of the island, particularly built heritage, will be important to maintaining its uniqueness and appeal and ensuring that St Helena remains competitive with other destinations. There is limited funding to support the maintenance or restoration of built heritage assets, which are key tourist attractions, or to support the upkeep of government buildings, many of which are listed, in high-traffic and popular tourist areas such as the wharf and Lower Jamestown.
20. While there is a Tourism Development Programme Board to manage the TDP fund, there is currently no active, unified private-sector Tourism Association to provide the sector with a collective voice. This leads to disconnect between the Government tourism body and the private sector operators, threatening long term cohesion and possible further loss of confidence in the sector.
21. Numerous 'single points of failure' exist within the island's infrastructure. Failure of major or strategic infrastructure could have significant consequences for the tourism sector and the wider island economy, highlighting the importance of resilience planning and contingency arrangements.

15. Key Considerations for Promoting St Helena as a Destination

15.1. The cost and frequency of air services influence the flexibility available to offer discounts or incentives to operators and travellers.

15.2. In September 2024, SHG and Airlink introduced the lowest fares to date, supported by a promotional campaign aimed at strengthening seasonal bookings. This aligned with Cape Town services (as opposed to Johannesburg) and resulted in a marked increase in bookings for March 2025.

15.3. Continuity and consistency in air routes and schedules are essential for sustainable sector growth. In previous seasons, flights alternated between Johannesburg and Cape Town, with departures shifting between Saturdays and Tuesdays. This variability made forward planning and advance bookings more challenging. Notably, from October 2025, Airlink committed to an 18-month schedule with consistent weekly Saturday departures from Johannesburg and Tuesday departures from Cape Town during peak season, representing a significant improvement in schedule certainty.

15.4. Historically, this variability reduced the ability of accommodation and tour providers to secure forward bookings and plan confidently for future demand. Greater certainty in air schedules provides an important foundation for future business confidence and investment.

15.5. Directional imbalances occur during December and January, with strong inbound travel in December and corresponding outbound flows in January. This pattern typically reflects Visiting Friends and Relatives (VFR) travel, a segment less likely to utilise serviced accommodation. While the VFR market remains an important economic contributor, this travel pattern can contribute to lower occupancy levels in serviced accommodation during these periods.

15.6. Peak season, from mid-January through March, coincides with whale shark aggregations and favourable weather conditions. The limited serviced accommodation often reaches capacity during this period, highlighting both the strength of demand and the opportunity to increase capacity to accommodate growing group travel and additional sales.

15.7. St Helena continues to manage a legacy perception of airport reliability among some elements of the travel trade. Increased weather-related delays during 2024 heightened industry concern. While it is too early to establish definitive trends for planning purposes, several agents and tour operators have cited these delays as a factor in their decision to cease selling St Helena. Continued improvements in operational reliability and clear communication with the travel trade will be important in strengthening confidence.

15.8. Mandatory pre- and post-overnights in Johannesburg extend a typical one-week stay on-island to more than 10 days for travellers originating in Europe or the UK. This makes itineraries linked to mid-week flights increasingly attractive for tour operators, particularly those selling to inbound South African markets. Travellers transiting via Cape Town experience far less resistance, given its status as a leisure destination.

15.9. The international travel market continues to favour Cape Town as an entry point to South Africa, reflecting its strong leisure tourism profile. Despite Airlink's Johannesburg base making it the primary gateway for St Helena, continued negotiations and ASSG support are expected to increase seasonal capacity from Cape Town in future years.

15.10. Increased uptake of digital booking systems, channel management software (CMS), and modern e-tourism tools would strengthen destination visibility and make travel arrangements easier for visitors. With over 80% of global hotel bookings now completed online, increasing digital booking capability will be central to the growth of the FIT market.

15.11. The desire and/or ability among Saints living overseas to travel home is reducing. Surveys conducted in 2024 (primarily among Saints in the UK) indicate that over half intend to return only every three to five years or more. In line with Aquila's forecasting, VFR travel appears to be plateauing and may decline further as more Saints relocate off-island. VFR stays typically range from two to four weeks, with Christmas remaining the most popular travel period. These trends reinforce the importance of engaging the VFR market directly as a specific tourism market, as well as developing the international leisure market.

16. The Tourism Development Programme (TDP) and Tourism Recovery Strategy

16.1. The Tourism Development Programme (TDP) supported a series of interventions across 2023/24 ("TDP1"), 2024/25 ("TDP2"), and 2025/26 ("TDP3"). These interventions provided additional resources to implement priority actions under the Tourism Recovery Strategy that could not be financed through Tourism's recurrent budget or SHG Corporate Services' marketing budget.

16.2. Going forward, all activities will be structured around six strategic focus areas, referred to as the Tourism Pillars. All three TDP departments will align their operational planning and delivery to these pillars:

1. **History and Heritage** - Encompassing the island's enslavement and abolition legacy, Zulu and Boer heritage, East India Company history, military fortifications, historic Jamestown, Plantation House, flax industry heritage, built heritage assets, and notable residents and visitors such as Napoleon, Dinizulu, Darwin, and Halley.
2. **Culture** - Including traditional events and festivals, culinary experiences, home hosting, sports and entertainment, arts and crafts, coffee, distillery and tap-house products, fishing traditions, and traditional ocean bamboo rod fishing.
3. **Marine** - Covering diving, snorkelling, free diving, kayaking, open-water swimming, sustainable sports fishing, rock fishing, marine safaris, boat tours, and sunset cruises.
4. **Conservation** - Encompassing both blue and green conservation initiatives, including Marine Protected Area VI, endemic fish species, whale sharks, dolphins, whales, the Cloud Forest, endemic flora and fauna, geology, and Jonathan the tortoise.
5. **Hiking** - Including the Post Box Walks, established trails, and traditional fishermen's routes.
6. **Adventure and Sport** - Covering marathon and endurance events, trail running, mountain biking, golf, kayaking safaris, rock climbing, 4x4 trails, clay pigeon shooting, rifle shooting, and group sports tours such as cricket, football, and swimming.

17. Product Development under the TDP1 to TDP3

17.1. Improved tourism infrastructure and built heritage.

1. Much of the island's unique and iconic built heritage is at a point of disrepair and will require significant funding just to allow continued safe access, such as High Knoll Fort. The TDP has funded improvements for a range of tourism-related infrastructure and listed buildings, including: the wharf buildings, the Grand Parade area, Post Office, Jamestown Market, Ladder Hill colonnade, Napoleon's Tomb road, Longwood Gate, Longwood Green/outside Longwood House, Millennium Forest gateway and car park, making High Knoll Fort safe and tidy; and initial restoration works on No 1 building in Rupert's to develop an interpretation centre. The TDP allowed purchases of equipment to support cruise ship visits and events.
   Work continues to: improve interpretation, directional and safety signage; and support the development of various locations around Jamestown that encourage User Generated Content (UGC). UGC is a powerful tool used in driving digital marketing where both locals and tourists take photographs in an instantly recognisable location and share this to social media. The creation of art instillations, focal points at historic sites and highlighting specific points of interest and making them more photogenic assists in creating these UGC sites.
2. The Post Office and Jamestown Market received significant maintenance and repainting of exteriors under TDP1 and TDP2.
3. TDP3 included the launch of a £50 000 grant fund. Administered by the Heritage Society of St Helena the fund is designed to encourage the maintenance of historic buildings by offering match-funding grants to cover visible works to listed buildings. With the Georgian Architecture being central to the marketability of Jamestown, the maintenance of this rich history should continue.

17.2. Accommodation capacity remains a challenge and has been further exacerbated by the closure of The Consulate and Town House. The consistency of service delivery in accommodation and Food and Beverage offerings remain an issue despite the delivery of extensive hospitality training in TDP1 and TDP2.

1. There are currently only around 65 serviced rooms (30 with Mantis) of varying quality available on St Helena.
2. There has been a decrease of around 14% in the number of available beds in fully serviced accommodation (hotels and guest houses) since commercial flights commenced and the Mantis St Helena hotel opened. The number of available self-catering properties can fluctuate wildly on St Helena as demand shifts between the number of self-catering properties available for short term visitors (mostly VFR and leisure tourists) and medium-long term rentals (business visitors, contract workers or locals renting). This, coupled with a lack of online booking processes, can significantly impact the budget friendly independent traveller's commitment to visit.
3. Usually, visitor accommodation is undertaken through private sector investment responding to an increase in demand. But the building of accommodation takes time. Medium to large scale developments will require years, but smaller guest houses and B&B accommodation can become available more quickly through the conversion of existing buildings or living spaces into guest rooms.
4. It is very likely that without government intervention through an accommodation grant scheme (like that offered on the Falklands) or the commencement of a catalytic development (like the investment into another Mantis-sized hotel), that there won't be a significant increase in the number of serviced rooms across the island in the next three to five years. Larger tour groups, will generally prefer to stay in fully serviced hotel accommodation. Thus, the availability of quality serviced rooms will be critical to attract and engage tour operators that could bring increased volume to St Helena.

17.3. Increased the number of hiking trails, improved their quality and safety, and is looking to leverage them through new operator partnerships.

1. In the last two years the island's hiking trails and footpaths have received significant upgrades. With the temporary closure of two of the most popular hikes in the Peaks National Park, four new Post Box walks have just been internationally accredited and opened at the start of 2025 for the Festival of Walking, bringing

the current number of Post Box Walks to 25 (originally 21). St Helena is probably the only destination with all of its hiking trails accredited by Green Flag / Eco Trails, a globally recognised international standard for trail accreditation. Additionally, path maintenance and walking guide courses have been offered under the TDP with a new hiking guidebook in development. There are currently twelve walking guides trained to Green Flag's international standard on St Helena.

2. Work has started on mountain bike trails following the potential market being highlighted by Green Flag/Eco Trails. A local e-MTB company launched in 2024 with secured inward investment to develop this activity, along with kayaking, over the next 2-3 years.
3. An ultramarathon and other sports activities, utilising a considerable part of the trail network are under development. The 'world's most remote marathon' is in development, partnering with a South African sports event organiser, set to take place in February 2027. The idea behind these and other events is to create reasons to visit, in the shoulder periods, effectively lengthening the season.
4. Globally, 'slack-pack' or 'trail walking' holidays have grown significantly. A number of destinations now place limits on the numbers of tourists on their trails and operate set departure dates to assist the management of the numbers. St Helena and the Post-box walks are ideally positioned to capitalise on this niche market and operators should be encouraged to enter this market.

17.4. Exploring the redevelopment of the Jamestown seafront

1. Feedback from industry experts highlight immense potential for the Jamestown seafront to house an array of tourism related businesses and marine support services. TDP2 funded a project manager to lead a working group to initiate the redevelopment for the entire Jamestown seafront. Work to collate past reports and documentation, gather stakeholder feedback, and present the findings to Ministers, has been concluded and options to progress are being considered.

17.5. Restore and develop key tourism assets

1. There is a great need to restore key tourism assets, listed buildings, various government assets, and particularly ancient built heritage. A bigger annual Product budget, perhaps combined with other funding sources and in partnership with other organisations, such as the St Helena National Trust, and with investor support, could see the start of largescale restoration projects, such as High Knoll Fort.

17.6. Table 6 below lists the **key attractions and the geographic locations.** This provides the framework from which to plan future tourism hubs, concentrating development spend in certain areas to allow the congregation of tourists, providing business with a focused location

History and Heritage	Jamestown, Rupert's Valley, Munden's, Deadwood, Lemon Valley, Plantation House, High Knoll, Museum, Ladder Hill, Deadwood and Broad Bottom.
	Famous Residents: - Longwood House, The Briars, Napoleon's Tomb, Halley's and Maskelyne's observatory sites, Plantation House
Culture	Genealogy at Archives, Museum, Fairyland Flax mill, Jamestown, Gordons Post, Francis Plain, Arts and Craft Centre.
Marine	Leeward side of the island – Primarily James Bay with ancillary locations at Rupert's Bay, Lemon Valle. Wrecks available for diving and snorkelling.
Conservation	Marine and Ocean - Marine Centre, Seafront/Warf Redevelopment, Ocean and Coast Terrestrial at: Peaks National Park, Millennium Forest, National Conservation Areas. Important Wirebird sites
Hiking	24 Post Box Walks, other trails and various footpaths and more challenging 'blue dot' walks
Adventure/Sports	Longwood Golf Club, Francis Plain, Ladder Hill Tennis Court, The Moat and Seafront/Wharf Redevelopment, Duke of Edinburgh Playground, Plantation Forest

Table 6: Geographic Locations of Attractions

18. TDP4 Product Development

18.1. Table 7: Product Development TDP 4 illustrates the key areas of focus for TDP4. Annex C – Potential Tourism Product Development Areas on St Helena 2026 - 2031 provides a non-exhaustive list of opportunities for tourism related products and guides the prioritisation when allocating funding for development opportunities when deciding on tourism infrastructure projects:

History and Heritage – (interpreted with historical accuracy, respect and cultural sensitivity)	Zulu History Interpretation Centre, No.1 Building Interpretation Centre for the Trans-Atlantic Slave Trade and St Helena's enslavement legacy. Culture Centre and Expansion of Museum Heritage Grant Scheme Anglo-Boer War History
Culture	Flax Mill rejuvenation/working museum, Work with Arts and Crafts Centre and add participatory activities and experiential learning of cultural skills within their Canister retail outlet and 'Toby's Cottage'
Marine	Work with Wharf Redevelopment and facilitate the provision of suitable infrastructure to allow improved access to the water for leisure pursuits.
Conservation	No funding required, however, maintain focus on opening the Peaks National Park to allow tourist access and continue open dialog with conservation operatives to highlight their infinitives.
Hiking	Complete post-box walk digitalisation allowing users to download routes, information, and planning data for the hiking trail.
Adventure/Sports	Signage of Marathon Routes, ParkRun

Table 7: Geographic Locations of Attractions

19. Marketing Under the TDP 1-3

19.1. The majority of the TDP fund goes towards marketing. SHG's annual marketing budget is under £250 000. With Government wide marketing responsibilities, only a portion of this is spent on tourism marketing activities. Annually, TDP allocates over 50% of the £500K Tourism Development Programme (TDP) budget to marketing activities. This is spent on print and digital campaigns, familiarisation and media trips, support for events, production of marketing collateral, attendance at travel trade shows and salary for a Destination Marketing Officer.

19.2. Although St Helena has a unique set of circumstances and benchmarking against a suitable 'competitor' is difficult, when compared to other destinations, **the spend on tourism marketing is particularly small (Annex D).** The £275 000 TDP marketing allocation for St Helena is 4% of the £7.5 million for Maldives spent in 2023.

19.3. Focus was on market awareness with digital and traditional campaigns building global attention to St Helena. **No segregation** or separate strategies have been done to target the three main areas of tourism (Visiting Friends and Relatives **(VFR), Group Travel** and Free Independent Travel (**FIT**). Each segment requires different marketing strategies as there are fundamental differences in the travel motivations, itinerary requirements, and value expectation.

19.4. St Helena Tourism has been forced to perform the role of Destination Management Company (DMC) as private sector have been slow to fill this need. The need to build DMC capacity has been highlighted by SHT and Tour Operators and during TDP3 focus has been on building the private sector DMC capacity. As private sector DMCs increase, St Helena Tourism will migrate towards **Destination Development and Marketing Organisation**, marketing St Helena and all registered tourism operators within the tourism and hospitality industry.

19.5. Digital marketing can increase the number of independent travellers. St Helena's focus on organic social media has contributed to audience growth. However, TDP2 highlighted that to fully capitalise in the digital age and attract a wider, more diverse visitor base, a significant investment in paid digital marketing is needed. Through TDP3 detailed that options would be explore and in the last quarter of the financial year Big Ambitions were contracted to provide digital boost services. TDP to expand on the relationship and ensure that metrics are in place to measure ROI for digital spend.

19.6. Recent years have witnessed a modest annual investment in **organic social media** to amplify content. However, this has not always translated into meaningful audience engagement. While boosted posts have generated significant reach, they have occasionally attracted unwanted attention from scammers, rather than potential travellers (examples being St Helena Tourism Travel Competition, Facebook 2023; Travel St Helena Accommodation Post, Facebook 2024).

19.7. Digital marketing agencies have proposed that a **substantial increase in digital marketing investment** is necessary to effectively compete in the digital landscape (Talking Stick Proposal, 2024). Digital marketing has the potential to significantly increase independent travel to St Helena. However, targeting the same audience limits visibility to new market segments. Research indicates that an additional £300,000 annual investment in digital marketing is necessary to increase online visibility and compete with other destinations (Annex E - Talking Stick, 2024,).

19.8. Tour operators have been engaged and received product training. From these, some added St Helena to their portfolios, but we are not yet seeing meaningful conversions. We currently record 31 ACTIVE Tour Operators (Annex F)

19.9. Trade shows cluster industry professionals - and top media, and potential investors - together, providing unique opportunities for St Helena to have many face-to-face meetings, to network, experience a range of products or services, to rapidly expand its contacts database and gather intelligence. Trade marketing has ramped up in TDP2 and first forays into attending tourism related investment forums were undertaken, along with work to develop St Helena as a film location. However, for every 30 operators engaged, two end up selling St Helena (a typical trade shows offer around 50 meetings with media and travel trade over 3 days).

19.10. Tour operators offer costed, tried-and-tested, packaged itineraries and have their own marketing channels. But it can take up to two years to add a destination to an operator's portfolio and then the operator still must sell the trip (trade engagement programmes have run since 2022). Advance booking through operators allows for better planning and stabilises cash flow, keeping local businesses in business. Attendance at trade shows, in combination with online product training, promotional partnerships (ATTA, The Africa Hub, TTG, etc.), that is synced with traditional and digital marketing campaigns, can significantly raise travel trade's awareness of the destination, and result in increased visibility to consumers.

19.11. Recommendations from Finn Partners, Big Ambitions, SATSA, Wesgro, Africa's Eden, ATTA, Talking Stick and other operators (notably the Showcase and other familiarisation trip attendees) will increase St Helena's participation in B2B and B2C fora in the future, connecting with operators and agents from proven and exploratory markets, such as North America, South and East Asia. Partners have recommended that St Helena invest in B2C shows from 2026. The recommendations for B2B and B2C events are Africa Travel Week (April 2025, Cape Town); Indaba (May 2025, Durban); ATTA's Experience Africa (June 2025, London); WTM London (November 2025, London); B2C Times Destination and The Adventure Show (Jan/Feb 2026, UK).

19.12. In April 2025 St Helena Tourism attended two trade shows as part of Africa Travel Week in Cape Town: the smaller 'boutique' trade show ILTM followed WTM Africa. Danova Travel accompanied St Helena Tourism to WTM Africa.

19.13. In May 2025 St Helena Tourism attended South African Tourism's Travel Indaba, the iconic African leisure trade show based in Durban. St Helena Tourism attended as an ATTA member.

19.14. St Helena Tourism attended WTM in November 2025 as an ATTA member.

19.15. Positively, there are valued tour operators like Africa & Oriental, Indigo Safaris, Waterworld and Live The Journey, that continue to send large groups to the island each year giving the few DMCs and other service providers consistent business. Some of this can be attributed to co-opted marketing initiatives between St Helena Tourism and select operators. Other joint marketing initiatives are underway Stepps, Live The Journey, Birdlife South Africa and ElecticInk.

20. Marketing Partnerships and Associations

20.1. While South Africa is nearing full recovery from the impacts of the pandemic, North and East Africa are significantly exceeding pre pandemic arrivals levels. The competition between African destinations for inbound tourism is fierce. In terms of travel, St Helena is seen as part of Southern Africa as air access to St Helena is through South Africa. This perception is enhanced, and leveraged, with St Helena as a member of the African Travel & Tourism Association (ATTA), through partnerships developed with the South African Tourism Services Association (SATSA) and Wesgro (the economic development arm of the Western Cape), and through trade training platforms such as The Africa Hub and TTG, and more recently the Africa trade specialist Africa's Eden, providing access to new markets, such as North America and European countries. Thus, to be competitive St Helena must compete in the marketplace as both a standalone destination and as part of the southern Africa region (for example, as an alternative to Indian Ocean islands).

20.2. The TDP has funded a range of promotional campaigns – usually a combination of print and digital, but also video/film, and radio – that are designed to: raise general awareness of the destination; target niche interests; provide a direct call to action (book a trip) through a joint marketing effort with a tour operator. Examples of campaigns delivered under the TDP are:

- St Helena trailer advert shown in cinemas in the South of England before the Ridley Scott Napoleon film.
- Darren Peen's Come and Find Me short promotional video which won Gold at the International Tourism Film Festival in 2025.
- Airlinks' Skyways magazine ongoing promotions
- Trail magazine (hiking)
- Scuba and Dive magazines
- Food & Travel magazine
- Wanderlust magazine and nominated as Most Desirable Island Worldwide 2025.
- Adventurize magazine (hard adventure) - ongoing
- JRNY magazine
- Birdwatching magazine
- We/Go! Magazine (soft adventure) co-opted with Live The Journey
- Getaway magazine (soft adventure)
- Cape Town etc. (primarily highlighting CPT flights)
- Travel Trade Gazette (TTG)
- The Africa Hub – online training and networking events
- Listed with Online Travel Training
- Cooped marketing with tour operators: Steppes, Rainbow Travel, Far & Wild, Dive Worldwide
- Translation of brochures (digital) into French, Spanish, German, Chinese
- Printing of new collateral (brochures, tourist maps, display material)
- Paid for video footage
- Pay Per Click (PPC) social media campaigns.
- AI Chatbot feature for tourism website
- National Geographic
- Hosted Momentum Multiply Titans Cricket preseason tour.
- SuperSport Coverage of Titans Tour

20.3. All Marketing Campaigns (Traditional or Digital) need to have a **call to action**. This enables the measuring and evaluation of the efficacy of campaign and ensures we can **determine ROI**. Where TDP has provided opportunities to develop valuable partnerships and associations, improvements in DMC and online booking capacity will enable direct call to action.

21. Contracted PR and Marketing Agencies

21.1. SHG has contracted Representation Plus a UK-based PR agency to assist with the marketing and PR needs. Following a year's extension in 2024, Finn Partners' contract ended in Q1 of 2025/26. The SHG Communications team published and circulated a Request for Proposals and the appropriate UK-based agency to support St Helena Government's and Tourism's communications, media relations, public relations and marketing priorities was appointed in December 2025.

21.2. Big Ambitions, the South Africa-based PR and marketing agency will continue their contract through the entirety of 2025/26. The contract with Big Ambitions' Marketing came to an end in July 2025, however, they are to be awarded a one-year extension whilst the new UK P.R company is evaluated.

21.3. Big Ambitions' strategy for 2025/26 (Annex G) is to harnesses the industry acumen and market insights that they are privy to based on their network, pinpointing and leveraging the following 5 key market segments or activities:

- Trade: Strengthen collaboration with South African tour operators and travel agents by offering exclusive St Helena packages and incentives. Streamline booking processes and provide comprehensive training to ensure partners are well-equipped to promote the island, driving increased visitor bookings from key travel trade partners.
- Media: Execute targeted media buying strategies and organise immersive media trips for journalists to St Helena. Leverage earned media through proactive pitching and relationship building with key travel journalists and content creators. Facilitate the creation of engaging content and feature articles, enhancing the island's visibility across various media platforms and showcasing its unique attractions to a broader audience.
- Events: Maximise presence at key travel trade shows like Africa Travel Week and Indaba. Engage potential visitors through interactive exhibits, networking events, and presentations highlighting the island's distinct attractions and experiences. Assistance and planning of on-island events like Cape Town to St Helena Yacht Race, The world's most remote marathon and others.
- Diaspora: Connect with the St Helena diaspora through tailored messaging and community activities. Engage expats and individuals with familial ties to the island, fostering pride and advocacy. Encouraging them to share their heritage and promote St Helena as a distinctive travel destination within their networks.
- Digital Advertising: Implement targeted digital marketing campaigns across relevant platforms driving traffic to the St Helena Tourism website, and other booking platforms. Partner with strategic advertisers to reach wider audiences and promote exclusive travel deals, boosting bookings.

NB: Retainer fees for the UK and SA agencies are paid from the Corporate Services budget (via the Communications Hub).

22. Marketing Themes and Direction 2026-2031

22.1. Representation Plus will be contracted to conduct a comprehensive **market research** investigation into the St Helena Tourisms target market to determine demographic profiles, geographic distribution, and visitor preferences.

22.2. This information will be blended with **the current trends** in tourism to drive bookings. Developing a robust brand awareness and education strategy that includes the championing of trends such as the rise in off-the-beaten track destinations, immersive travel and travellers looking for authentic experiences from their trips are, is vital in driving consumer consideration and ultimately bookings to St Helena.

22.3. We will highlight St Helena's **unique attractions, experiences, and cultural offerings** that set it apart from other emerging destinations, through its welcoming culture, unique heritage and wildlife underpinned by the tranquil way of life. When we sell St Helena, we don't sell the similarities to other island destinations, we sell the differences!

22.4. St Helena offers a wealth of **soft adventure** with its network of nature hikes through unique habitats and ecosystems that are found nowhere else on Earth, with a backdrop of spectacular natural beauty.

22.5. Conservation must become one of the focus areas of our tourism marketing. With tourists striving for responsible travel experiences, the island's **Marine Protected Area,** rich with marine life from humpbacks, whale sharks, dolphins, endemic fish, seabirds, turtles, rays, shipwrecks and more and the amazing work being done on terrestrial conservation from **wirebird** and **endemic species** protection through to the protection of the **Peaks National Park** will become a main area of promotion.

22.6. Our strategy will continue to focus on educating the trade whilst developing our offering so that tour **operators build product** around St Helena's uniqueness, creating itineraries which are new and attractive in the market. SHT will develop a 7-day itinerary for each of the **six Tourism Pillars** and will encourage DMCs to focus on specific niche areas.

22.7. Niche Tourism opportunities to be further explored and **an events schedule** will be developed to champion these areas. Walking/hiking, cultural and genealogy, sporting events, conservation areas such as bird watching tours and whale shark festival to be expanded on. Development of new products targeting specific markets to be explored such as the LGBQ+, voluntourism, sport fishing, conservation etc.

22.8. All interpretation and promotion will be undertaken with appropriate cultural sensitivity and stakeholder engagement.

22.9. Channel Management and Online Booking Portals: Currently over 80% of global holiday accommodation is now booked online and over half of these bookings are made through expedia.com or bookings.com. To attract the FIT market there is an urgent need to increase online booking capacity.

22.10. The St Helena Tourism website will evolve into a more user-focused planning platform, allowing visitors to discover experiences by interest category, with improved tour information, pricing guidance, availability and booking pathways.

22.11. AI discoverability: improve the digital availability and structure of tourism information to enhance discoverability through AI-powered search and trip planning tools."

22.12. Through close collaboration with tour operators, travel agencies, airline partners and the media, we will promote St Helena as the 'ultimate, emerging **bucket list destination**' with a focus on medium to high-value visitors.

22.13. From TDP4 onwards, separate marketing strategies will be implemented targeting the three separate markets:

VFR	• Diaspora Initiative
Groups	• Focus on B2B platforms to engage new Tour Operators. Traditional trade focused publications, digital publications and B2B focused social media platforms to drive T.O to engage private sector DMC companies. • Build/maintain relationships with T.O through telephone engagements, quarterly trade newsletters. • Expand T.O network through B2B trade shows and re-engaging previous, lost agents. • Introduction of new products that are easily included in T.O brochures. • Capacity building within DMCs to allow T.O's to efficiently communicate and sell 'real-time' • Develop six events – one from each pillar – to provide a focal point for group travel. These events, although some will be hosted during peak season, will migrate to shoulder periods in TDP5 and 6.
FIT	• Prioritise Digital Campaigns to create destination awareness. • Paid promotions targeting sectors identified by Representation Plus will drive growth in FIT, however, digital will also drive interest in Group and VFR sectors. • Focus on digital content creation around six Pillars. Ensure that content creators are tasked with showcasing commercially available products thus driving FIT numbers directly to a purchase point. • The six-event programme, although targeting group travel, will provide marketing collateral and 'tourism product' to enable FIT uptake. • Increase St Helena Digital Tourism Commerce platforms to allow direct clickthrough/ conversion. • Deploy User Generated Content software to collate and get approval for use of digital marketing material, allowing increased frequency of posting.

Table 8: Marketing Plan

23. Leveraging Marketing Partnerships

23.1. During the recovery period, St Helena developed key partnerships and associations, including: SATSA, Wesgro, ATTA, The Travel Hub, Africa's Eden and Talking Stick and a range of tour operators. In 2025/26 we will continue to harness the industry acumen and market insights gleaned from partners and associates through their networks and know-how, leveraging the following key segments and activities:

23.2. Trade: Strengthen collaboration with tour operators and travel agents by offering exclusive St Helena packages and incentives. We will help streamline booking processes and provide comprehensive training to ensure partners are well-equipped to promote the island, driving increased visitor bookings from key travel trade partners.

23.3. Media: Execute targeted media buying strategies and organise immersive media trips for journalists to St Helena. Leverage earned media through proactive pitching and relationship building with key travel journalists and content creators. Facilitate the creation of engaging content and feature articles, enhancing the island's visibility across various media platforms and showcasing its unique attractions to a broader audience.

23.4. Events: Maximise our presence at key travel trade shows like the World Travel Markets, Experience Africa, and Indaba, whilst seeking new events with a solid ROI. Engage potential visitors through interactive exhibits, networking events, and presentations highlighting the island's distinct attractions and experiences. With partners' assistance with planning of on-island events like the world's most remote marathon, 'Adventure Week', and ensure positive ROI with familiarisation and media trips.

23.5. Diaspora: We will launch a Diaspora Initiative to connect with the St Helena diaspora through tailored messaging and community activities with support for off island diaspora events that could boost VFR travel. We will engage expats and individuals with familial ties to the island, fostering pride and advocacy, encouraging them to share their heritage and proudly promote the island as a unique travel destination within their networks. One key element is to encourage this market to visit the island 'out of season' or during shoulder periods, freeing up capacity during peak season for international leisure travel.

23.6. Digital Advertising: Implement targeted digital marketing campaigns across relevant platforms driving traffic to the St Helena Tourism website, and other booking platforms. We will partner with strategic service providers to access a wider audience and promote exclusive travel deals, boosting bookings.

24. Capacity Building Under the TDP1-TDP3

24.1. The TDP has improved staffing within Tourism. Recruited a full-time Destination Marketing Officer, two full-time Tourism Officers, part-time support staff.

24.2. The TDP has trained over 170 people through various tour guiding courses. During COVID 19, key individuals from the tourism and hospitality sectors started leaving the island and this continues, worsening the 'brain drain' effect, with the impact of decreasing the number of eating places, tours, activities and other tourism services. Efforts to mitigate the dwindling number of tour guides through a variety of courses saw encouraging attendance. These courses have buoyed tour guide services somewhat, however, availability of guides and consistency in offering continues to be a challenge.

24.3. We have undertaken general training for cruise ship guides, French language training, enslavement and abolition legacy on St Helena, Napoleon on St Helena, Walking Guide Training, First Aid training, SHG's Marine Division.

24.4. The TDP has also funded a range of short hospitality training courses. Outside the TDP, there is no other significant hospitality training being offered through the national curriculum or other schemes on the island. Over 110 people were trained under TDP1. Under TDP2, 230 attendees participated in hospitality training. A range of courses were attended by representatives from St Helena Airport, Solomons, Rose & Crown, SHG, SHAPE, tour guides, accommodation owners, restaurants and food vendors. Below are the courses and the number of participants trained under TDP1 and TDP2.

1. TDP1: Lessons in Leadership, Customer Service, Train the Trainer, Culinary, Hospitality Operations, Food & Beverage.
2. TDP2: Advanced Supervision, Communication, Customer Service and Professionalism in the Workplace, Communication & Presentation Skills, Conflict Management, Train the Trainer, Brand Awareness, Cultural Awareness, Developing Emotional Intelligence, Time & Stress Management, Work-life Balance, Front Office Upselling, Reservation Sales, Food Hygiene, Food & Beverage, Culinary.

24.5. Training programmes under the TDP have been delivered in the off-season months to ensure maximum participation from those that work in the sectors. For the first two years, NQtac Hotel School and Hospitality Training has been contracted under the TDP. Following TDP2 training, a value for money review was conducted and the decision was made to not extend the contract into TDP3.

24.6. Feedback from the Tour Operators is that the Destination Management Companies on St Helena require significant upskilling to ensure that the industry aligns with global best practices. TDP3 focusing on developing skills within the DMC industry and international DMC Trainer Andrew Lailveaux was employed to conduct DMC training. 27 individuals attended the course, and 4 operators have registered with St Helena Tourism post training. Continued support and advice is being provided by St Helena Tourism and trainings are planned around product packaging, social media marketing and business skills development.

25.Strengthening Capacity 2026-2031

25.1. In line with the Celebrating St Helena brand document and with the global tourism trend towards Authentic Experiences, All Capacity Improvements must be centred on building the ability for the Tourism and Hospitality operators to deliver sustainable, authentic products consistently and reliably. By building and delivering an industry that is internationally recognised as having integrity and authenticity, the St Helena tourism sector will continue to grow.

25.2. To encourage people to reinvest in their businesses there is a need to create and build confidence in the industry. To do this there is a need to prove that tourism can be profitable. Local Industry Engagement must continue, and the focus will be on building business skill, marketing capacity and where proprietors show willing, digital marketing and e-commerce capacity.

25.3. Develop and deploy a St Helena Tourism registration process ensuring that all registered operators meet a recognisable level of safety, service and knowledge.

25.4. Establish and support a St Helena Tourism Association by 2027 to provide a collective industry voice and structured engagement mechanism with SHG.

25.5. Continue with skills development within the terrestrial tour guides but roll out tour guide trainings specifically designed for Marine operators. Focus on Built Heritage and fortifications that are viewable from the ocean, stargazing from the ocean (and navigation using stars).

25.6. Introduce more nighttime activities to allow increased visitor spend. Local suppliers to be encouraged to develop Jamestown at night, stargazing tours, dark history tours, culinary and bar-tours.

25.7. St Helena Tourism will continue to develop relationships with international Tour Operators through travel shows and outreach programmes. We will promote all the registered St Helena Tourism Providers and will continue to train local industry suppliers on commission structures to allow sustainable growth. We will encourage and capacitate private sector Destination Management Companies (DMC) to develop commercial relationships with the Tour Operators,

25.8. Although we will encourage DMCs to maintain their own relationships with Tour Operators, St Helena Tourism Officers will be allocated specific international Tour Operators with whom they will establish and build working relationships. These relationships will focus on wider St Helena Tourism industry and will focus on aftersales, customer satisfaction and will allow Tourism to develop capacity within areas that international Tour Operators highlight as underperforming.

25.9. TDP1, 2 and 3 allowed the growth of the St Helena Tourism team to include 2 full time Tourism Officers, 2 part-time officers and 1 full time Destination Marketing Officer. These roles are one-year contracts in line with the TDP funding and are supervised by the Tourism Manager who is paid through the recuring budget. Consideration should be given in subsequent years to moving the roles out of TDP and into recuring budget to ensure continuity and confidence of employees in these roles.

25.10. The Destination Marketing Officer (DMO) currently works from within the Communications Hub and there is ambiguity in reporting lines and responsibilities. In TDP4, the DMO role will move back under Head of Tourism with the roll taking on more of a digital resource and relationship management focus.

26. Yachts and Cruise Ships

26.1. Being a remote island St Helena has a powerful link to the ocean and seafaring trade. This carries through to the tourism industry and pre-airport; all tourists arrived via the ocean. The RMS St Helena, yachts and the occasional cruise liner provided 100% of tourists. Since the opening of the airport the focus, particularly for St Helena Tourism has shifted to arrivals via air.

26.2. St Helena remains an attractive stop for transatlantic voyages. With the advent of the biannual Governor's Cup Race from 1996, and a steady increase in yacht arrivals at St Helena, in 2012, under Enterprise St Helena's Tourism Development Project, 23 yacht moorings were installed in the area under Ladder Hill Fort.

26.3. These moorings remained in place for over ten years until, in late 2023, a detailed inspection revealed significant wear on the ground chain. This followed a few years where inspections and maintenance of the facility was wanting. Following the inspection, port authorities considered the liability of the moorings breaking as a high risk and therefore closed the moorings on 05 January 2024. January to March 2024 was the first yachting season since 2012 where no fixed mooring facility has been available to visiting yachts.

26.4. During December 2025, the existing yacht mooring infrastructure will be removed. As part of an MPA-funded development, this area will then be opened for yachts to anchor safely, without the risk of snagging or becoming entangled in SHG infrastructure which has posed a significant liability risk.

26.5. Table 9 – *Annual Arrivals via Yachts: 2011–2025* shows that total arrivals increased following the closure of the moorings. However, it should be noted that no data is currently available on the average length of stay by visiting yachts. It is anticipated that, following the closure of the mooring field, the VLS will decrease, as insurance requirements generally oblige yachts to remain manned while at anchor. This reduces the ability of yacht crews to spend extended leisure time ashore in the absence of mooring infrastructure.

26.6. To encourage yachts to stay longer, St Helena Tourism is working with the St Helena Yacht Club (a registered charity) to provide additional anchors and chains for use by visiting yachts. This supplementary anchorage equipment is expected to offer yacht crews greater peace of mind. By strengthening communication and building a more strategic partnership with the Yacht Club, St Helena Tourism aims to encourage increased yacht arrivals in future years.

26.7. The yacht market is traditionally a 'word of mouth' market. The drive to develop St Helena e-tourism capacity will improve access to the islands' tourism products, increasing the islands appeal as a longer stay destination.

Year	Arrival By Yacht
2011/12	618
2012/13	708
2013/14	625
2014/15	624
2015/16	594
2016/17	675
2017/18	649
2018/19	722
2019/20	532
2020/21	81
2021/22	282
2022/23	696
2023/24	574
2024/25	826

Table 9 - Annual Arrivals via Yachts: 2011–2025

26.8. No St Helena Cruise Ship Policy currently exists to guide the development of cruise-ship tourism, and no active marketing has previously been directed toward this segment. St Helena's geographic location, combined with its unique tourism offering, positions the cruise-ship market as a potentially lucrative opportunity. However, several significant infrastructural limitations continue to hinder growth in this area:

1. Lack of a safe, sheltered harbour with facilities that allow direct passenger disembarkation.
2. Uncertainty regarding disembarkation operations at the Steps, particularly under variable weather conditions.
3. High physical demands placed on passengers during disembarkation, even in favourable conditions, due to the current landing system.
4. Limited capacity on-island to deliver "bulk tourism" experiences. St Helena traditionally focuses on niche, low-volume tourism, and the sudden influx of cruise visitors creates operational pressures for local tourism providers.

26.9. Without substantial investment in critical port and landing infrastructure, large cruise ships will remain unable to guarantee passenger disembarkation at St Helena. Consequently, cruise lines cannot confidently include St Helena Island Exploration as a confirmed stop within their itineraries. This lack of long-term scheduling certainty will continue to create instability and operational challenges for local service providers.

26.10. St Helena Tourism has highlighted the cruise ship subsector – 'exploration vessels' as a viable target market. Traditional cruise ships carry between 700 and 4000 passengers and focus on onboard entertainment options, have set itineraries and seldom spending more than 12 hours in one location. Exploration cruises carry a maximum of 250 tourists, have greater flexibility in itineraries as the tend to stay multiple nights in once location and focus on off-ship experiences. Exploration vessels remain the preferred cruise segment due to alignment with St Helena's low-volume, high-value tourism model.

26.11. Work with Yacht Club to encourage visitors surveys, improve information available to visiting yachts, explore participation in international yacht cruising networks, improve arrival information and welcome signage.

26.12. St Helena Tourism plans on utilising the network developed in TDP1,2 and 3 to explore and market St Helena as a Exploration Cruise destination as this market is more strategically aligned with our long term tourism goals.

Year	Cruise Ship Arrivals
2013	1920
2014	3335
2015	6444
2016	2257
2017	681
2018	2091
2019	3005
2020	735
2021	0
2022	0
2023	1636
2024	3930

Table 10 – Cruise Ship Arrivals Calendar Year 2013 – 2024

27. Comparison of TDP3 and TDP4 Budgets

27.1. Tourism's recurrent budget for 2025/26 is circa £75K includes salaries of senior staff, Post Box Walks maintenance contract, Napoleonic Heritage SLA and all operational costs (IT, telecoms, utilities, office costs, building maintenance, etc). This is expected to remain the same for TDP4. Over the past three years, the TDP has provided a ring-fenced budget of £500,000 annually.

27.2. Under TDP4, an additional £50,000 has been requested to support priority enhancements, including:

1. Improving access for mobility-impaired visitors at selected, more accessible viewpoints.
2. Upgrading ocean access facilities for tourists at the Jamestown Wharf.
3. Expanding marketing activities, including increased trade show participation and enhanced digital content creation.

27.3. Detailed budget comparison is found in Annex H – TDP 3 and TDP 4 Budget Comparison.

27.4. Table 11: *Comparison of TDP3 and TDP4 proposed Budget Allocations* in line with the Strategic Direction laid out in this document.

Allocation		2025-2026	2026-2027
Product	Tourism infrastructure Improvements	£45 500	£51 000
	Instagram Tour	£10 000	
	Wharf Redevelopment - Improved Ocean Access		£15 000
	Heritage Grant Scheme	£50 000	£50 000
Total Product		**£105 500**	**£116 000**
Marketing	Support for events to encourage visitors in shoulder periods	£47 000	£53 000
	Trade/Travel Shows	£63 000	£78 000
	Africa Hub & OTT	£7 000	£7 000
	FAM Trips	£34 140	£40 000
	Content	£54 800	£63 000
	Advertising Campaigns	£53 350	£67 000
	Equipment - Camera, Sound, editing, mastering	£1 050	£0
	Research - Target Market	£14 250	£0
Total Marketing		**£274 590**	**£308 000**
Capacity	Hospitality Training	£17 500	£12 000
	Tour Guide Training	£7 500	£7 500
	Staff (full & part time)	£65 410	£75 000
	Product Development & Trade	£20 000	£8 000
	DMC Support	£0	£9 500
	Skills and Development	£9 500	£14 000
Total Capacity		**£119 910**	**£126 000**
Total TDP Budget		**£500 000**	**£550 000**

Table 11: Comparison of TDP3 and TDP4 proposed Budget Allocations

28. Tourism Action Plan 2026-2031

28.1. Executive Summary

- St Helena Tourism aims to achieve sustainable growth over five years, building from the 5007 arrivals in FY 2024/25 to 5980 arrivals by FY 2030/2031. This plan addresses critical constraints: limited accommodation (65 serviced rooms), weather-related flight delays (23% of flights in 2024), and strategic marketing investment.
- **Current Position:** The island has achieved a 99% return to pre-pandemic arrival levels. October 2024, January and March 2025 recorded the highest ever comparative leisure arrivals and therefore, it appears that St Helena has returned to pre-COVID 19 tourism numbers.
- 2025/2026 low season arrivals have outperformed 2024/2025, however, late February mid-week flights and all March 2026 flights have been changed to originate from Johannesburg (versus 2025 from Cape Town) and this has had a negative effect on forecasted sales, nullifying the positive gains for the early season.
- **Five-Year Vision:** Transform St Helena into a recognised medium-to-high-value, low-volume destination with year-round appeal, improved service standards, and sufficient infrastructure to support 4% annual growth arrivals.
- **Budget Requirements:** The proposal is based around a total FCDO funding of £2.75million paid in annual instalments £550,000. This funding will continue to focus on three main delivery areas: product development, marketing expansion, and capacity building.

28.2. Strategic Context

- **Purpose**: Utilising the Tourism Strategy and Delivery Plan 2025-2026, this five-year action plan provides a pathway for growth within the St Helena Tourism department from August 2025 to March 2031.

28.3. Key Assumptions:

1. Annual Tourism Development Programme budget will be increased to £550,000 annually.

   Tourism recurrent budget of £75,000 to be funded by St Helena Government.
2. Aquila Aviation base case forecast is for no growth within the VFR market in the next 3 years. Thereafter, it is assumed that the VFR market shall show a gradual decline annually due to the declining population.
3. Air routes to remain unattractive as a purely commercial route and SHG will continue to guarantee once weekly Airlink, Embraer E190 flight from Johannesburg and will further guarantee seasonal (December to March) midweek Cape Town services.
4. Airlink passenger capacity to remain at 92max pax per flight.
5. With 2024 having the highest occurrence of flight delays, we are assuming between 10% and 15% of flights will be affected by substantial delays.
6. Private sector to remain sceptical about investing into serviced accommodation without SHG/SHT actively engaging and promoting improvements and expansion to accommodations.

29. Success Measures for Objectives

Objective	Objective Description	Achieved When
Primary	Increase Leisure Arrivals by 4%	2030/2031 Leisure arrivals are 21% higher than 2024/2025 arrivals.
1	Develop and Diversify Tourism Offering	Commercially available 3 and 7 day itineraries for each of the six pillars of tourism.
2	Strengthen and Expand Tourism Offering	50 additional jobs created within the tourism industry.
3	Strengthen tourism industry collaboration through establishment of a representative industry body and regular public-private engagement.	Representative Body meet quarterly with formal engagement between the industry body and St Helena Tourism.
4	Optimise Accommodation Capacity	Suitably align accommodation offering with international standards and price points. Increase registered and graded Serviced Room offering to 90 rooms.
5	Increase Destination awareness through target marketing campaigns	Annual calendar of events covering each of the six pillars of tourism. 3million unique users per month via social and traditional media.
6	Develop key markets by increasing the number of tour operators selling St Helena and improve conversion rates	Increase DMC providers on the Island to 5 who manage and develop upstream relationships with a network of 60 tour operators actively selling the island.
7	Attract more 'off season' visitors to St Helena in the shoulder periods and 'winter' months.	Reduce peak-season dependency from 55% to 45% of annual arrivals
8	Develop the skills of those that work in the tourism and hospitality sectors to improve the St Helena experience and increase visitor satisfaction.	Achieve 85% visitor satisfaction rating.

Table 11: Comparison of TDP3 and TDP4 proposed Budget Allocations

30. Annual Targets for Success

30.1. TDP3 (FY 2025/26): Foundational Key Achievements. During the year we expect to achieve:

Arrivals Target: 4% growth from 2024/2025

ADS: System to formally record ADS in place by end of FY.

ALS: Review updated system and publish Average Length of Stay figures.

Key Milestones:

1. Product Due to be Complete:

- Launch Heritage Grant Scheme with £50,000 funding.
- Complete Jamestown seafront consultation.
- Comprehensive signage review and updated signs to be installed at key sites where needed update.
- Castle Garden Solar Light Instillation
- Walk Through History Interpretative instillation
- Church Lane Lighting Instillation.
- Zulu Memorial & Interpretation Centre Plans proposed and lodged with planning department and site clearing has commenced.

2. Marketing:

- Secure UK PR agency contract for three years and extended SA PR agency contract for one year.
- UK P.R agency conducted extensive survey on St Helena Travel target market to supply key data for 5-year marketing plan.
- Comprehensive Events programme in place targeting niche targets with aligned P.R and influencer campaigns. Initially these will be non-profitable events designed as marketing initiatives, however, by the end of the 5-year strategy, any events not operating at break-even should be re-evaluated.
- Delivered Niche Events in:
  - History and Heritage - Photographic Competition
  - Culture: Assist where necessary with National Trust Culture Month in May 2026. Provide support where needed and ensure marketing focus is around cultural initiatives. St Helena Day falls in May 2026 and ensure that focus is placed on this event with this year's focus/theme will be local food.
  - Marine/Ocean - Assist Marine with organising their annual Ocean Festival in March 2026 and explore ways to promote this to tourists.
  - Hiking - Festival of Walking from December 2025 to February 2026.
  - Adventure - Titans Cricket Team Tour – created social media interest, showcased St Helena as a destination for training camps and MICE. Adventure Week to be held in conjunction with the World's Most Remote Marathon. This will showcase St Helena as a destination for active tourists with Open Water swims (Wreck to Wreck) Post-box walks and Jacobs Ladder Challenge.
  - Conservation - Assist National Trust with their annual Whale Shark Festival held in February/March every year.

3. Capacity

- DMC Training - 35 individuals attended, and 2 new companies registered with SHT
- Actively encourage tourists to complete exit surveys at airport and yacht club. Achieve 4% exit completion and 75% visitor satisfaction rating.
- Through tour guide training – ensure that we have a minimum of 7 guides available to SHT.
- Deploy digital application to improve accessibility of Post-box walks (Outdoor Active)
- Conduct a Business Training Course for Hospitality and Tourism Businesses.
- St Helena Tourism to be offering a 7 day a week service (at Canister and/or St Helena Airport).
- Slack Pack itineraries developed for launch 2026/2027.

30.2. TDP 4 (FY 2026/27): Growth

Arrivals Target: 4% growth

ADS: Improvements to the system for formally recording ADS are finalised by end of FY.

ALS: Review and formalise ALS calculation.

Key Milestones:

1. Product

- Review the Heritage Grant Scheme and amend to create a £50,000 Tourism Infrastructure Development Scheme focused on increasing available accommodation within Heritage Buildings.
- Zulu Memorial complete and open to public and interpretation centre focused on the Zulu history on St Helena progressing.
- Enhance infrastructure at designated picnic sites and other key strategic locations to encourage their increased use by tour guides during island tours. In parallel, improve access for mobility-impaired visitors at appropriate and less complex sites to ensure greater inclusivity and broaden visitor participation.
- Expand access to culturally focused products. Assist 'Arts and Crafts' to provide flax weaving and cultural skills at their shop in the Canister. Explore opportunities to develop interactive flax site and a site offering cultural food experiences.
- Jacobs Ladder Timing App Launched with online leader board.
- Assist the St Helena National Trust and the Heritage Society in developing a Built Heritage Conservation Programme. The programme should aim to:
  - Maintain and restore the island's-built heritage, ensuring the long-term preservation of historic structures.
  - Generate sustainable revenue streams to enable proactive, self-funded maintenance of priority heritage assets.
  - Undertake further consultation to establish a prioritised list of restoration projects; however, from a tourism development perspective, High Knoll, Ladder Hill fort and Bankes Battery should be considered a priority site.
- Maintain active participation on development boards and support the proactive advancement of key strategic projects, including:
  - Liberated African Interpretation Centre - Encourage, lobby, and provide assistance where appropriate to accelerate development of this project, which represents a core component of the History pillar.
  - Wharf Redevelopment - Advocate for enhanced ocean access and related infrastructure improvements to support growth within the Marine and Active tourism pillars.
  - Peaks National Park and cloud forest - Support the development of conservation-focused tourism products that strengthen the Conservation pillar and enhance the destination's nature-based offerings.

2. Marketing

- Launch St Helena Diaspora Initiative (Annex I), designed to attract and encourage VFR during periods of lower demand but with significant cultural and family draw. Any peak season capacity vacated by VFR is filled by international leisure travel during peak season.
- Measurable diaspora participants in Culture Month and St Helena Day.
- Achieve 45 actively selling tour operators, through regular engagement at specific trade shows, familiarisation visits, and improved customer relationship management.
- Grow base year events, delivering growth in marathon event to 60 participants and measurable uptake on international guests during Festival of Walking.
- Maintain or reduce peak season concentration (currently 55%)
- Trade Show Presence at WTM Africa, Indaba, Experience Africa London and WTM London.

3. Capacity

- Launch Concierge Services in Johannesburg International Airport to reduce negative impact on brand caused by delayed flights.
- Actively encourage tourists to complete exit surveys at airport and yacht club. Achieve 5% exit completion and 78% visitor satisfaction

rating.

- Continue to develop business skills through business skills trainings.
- Assist 3 DMC businesses to attend WTM Africa with St Helena Tourism Team.
- Assist private sector to deploy online booking and channel management software to allow online booking.
- Successfully host six events in line with the six Pillar Strategy as outlined in Year 0.
- Expand on the World Tourism Day celebratory event that was held in 2025 and host St Helena Tourism Awards to recognise the effort and success of our Tourism Service Providers.
- St Helena Tourism Association to be relaunched.
- Currently tourism activities are restricted to daytime with the only activities available to tourists being restaurants and climbing Jacobs ladder. We will assist private sector to develop and launch one commercial tourism product operating at night.
- Slack Pack itineraries targeting multi-day hiking operational.

30.3. TDP 5 (FY 2027/28): Expansion

Arrivals Target: 4% growth

ADS: Compare with previous year and ensure that ADS is increased by a minimum of the annual inflation rate. ADS.

ALS: Maintain at previous years level.

Key Milestones:

1. Product

- Reach 75 serviced rooms capacity through Tourism Infrastructure Development Initiative.
- Boer History Display expanded in Museum
    - Feasibility study conducted on interpretation centre at Deadwood and Broad Bottom.
- Liberated African Interpretation Centre to be completed at Ruperts Valley and presented with historically accurate, respect and cultural sensitivity.
- A comprehensive strategy will be in place for the development of tourism offering in Lemon Valley. This to be centred around the historical elements of the location and the access to the ocean. Significant attention must be placed on enhancing the experience for locals as well as tourists.
- Flax Industry Culture Centre Developed.
- Sisters Walk Botanical Gardens. Reinvigorate the Gardens at Sisters walk connecting the Castle Gardens, Warf Redevelopment, Walk through History and Munden's Lane.

2. Marketing

- Review trial of Diaspora Initiative and actively launch 'Saints Return' programme with primary focus on Culture Month May 2028 and Easter 2028.
- Achieve 50 actively selling tour operators
- Further expand events calendar, delivering growth in marathon, international uptake on Festival of Walking.
    - Marathon uptake should be 80 participants,
    - Minimum of 5% growth should be gained through all other events.
- Maintain or reduce peak season concentration (currently 52%)
- Trade Show Presence at WTM Africa, Experience Africa London and decision made between attending WTM London or Indaba once ROI reports have been submitted from 2026/2027.

3. Capacity

- Review Concierge Services in Johannesburg International Airport. If effective this to be rolled out in Cape Town Airport if necessary but if ineffective, this initiative to be shelved.
- Actively encourage tourists to complete exit surveys at airport and yacht club. Achieve 5% exit completion and 80% visitor satisfaction rating.
- Launch the Tourism Registration Initiative, with a published standard covering health and safety, service and operational requirements for tourism and hospitality businesses.
- Introduce MICE trainings through certified trainers.
    - St Helena Tourism to employ Event Coordinator as part of the permanent team.
- Continue to encourage proper business operations through business skills trainings.
- 2 DMC businesses to attend WTM Africa with St Helena Tourism Team, however, less financial assistance to be made available.

30.4. TDP 6 (FY 2028/29): Consolidation

Arrivals Target: 4% growth

ADS: Compare with previous year and design growth strategy based on trends.

ALS: Maintain whist increasing arrivals.

Key Milestones:

1. Product

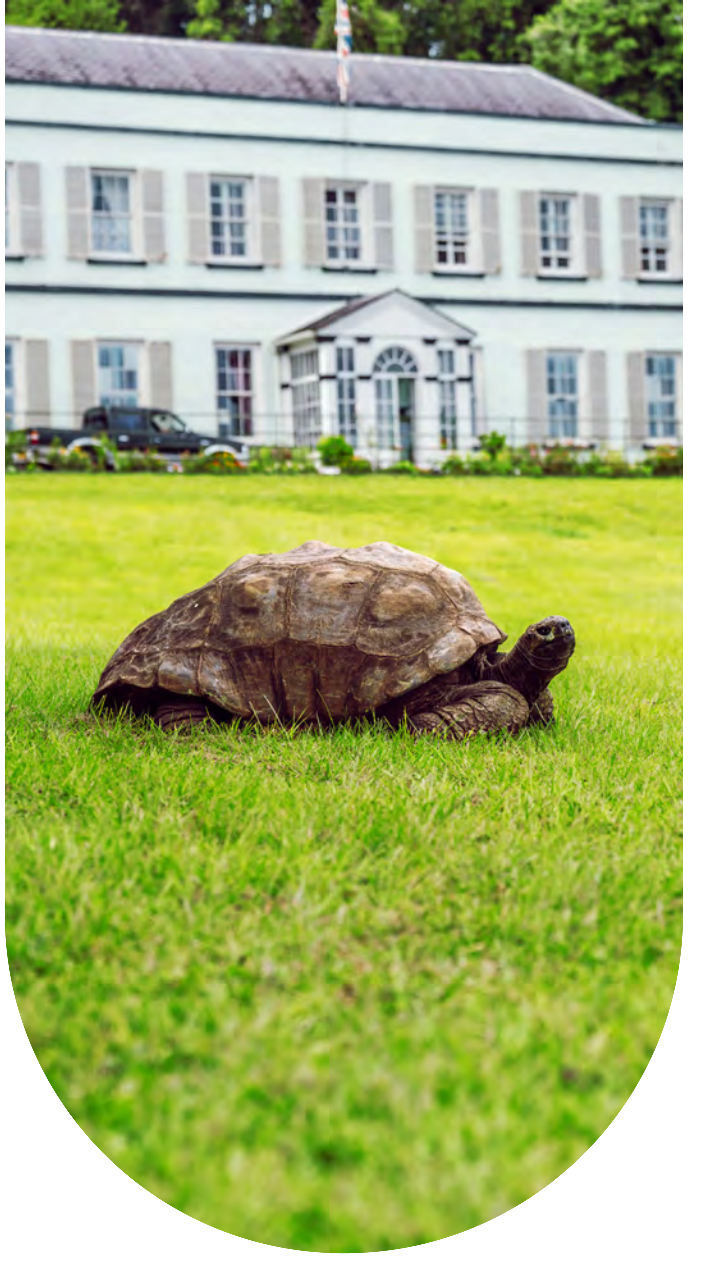
- 80 serviced rooms available, assisted through Tourism Infrastructure Development Scheme.
- Jacobs Ladder and Post-box App to be expanded to St Helena Tourism App.
- Review and allocation of funding towards Lemon Valley Tourism Development and/or Boer Prisoner of War Interpretation Centre.
- East India Company Tour Development.

2. Marketing

- Review trial of Diaspora Initiative.
- Achieve 55 actively selling tour operators
- Expanded participation in events, both local and international. Marathon uptake should be 95 participants, and a minimum of 5% growth should be gained through all other events.
    - Marathon should be drawing international sponsorship, reducing costs to TDP.
- Maintain or reduce peak season concentration (currently 50%)
- Trade Show Presence at WTM Africa, Adventure Travel World Summit, Experience Africa London and WTM London.

3. Capacity

- Launch MICE (meetings, conferences, events) product
- Actively encourage tourists to complete exit surveys at airport and yacht club. Achieve 5% exit completion and 82% visitor satisfaction rating.
- Continually review Concierge Services in areas of operation.
- Continue with Tourism Registration Initiative and expand to become Tourism Grading Initiative whereby hospitality operations are 'star rated'.
- Continue to encourage proper business operations through business skills trainings.
- Facilitate DMC businesses to attend global trade shows under Tourism guidance and assistance.
- Develop the events strategy to expand on the successes of previous years events.



30.5. TDP 7 (FY 2029/30): Maturity

Arrivals Target: 4% growth

ADS: Review against growth expectations and adjust where necessary.

ALS: Maintain whilst arrivals increase

Key Milestones:

1. Product

- 85 serviced rooms available, assisted through Tourism Infrastructure Development Scheme.
- Complete Lemon Valley Tourism Development Plan and/or Boer Prisoner of War Interpretation Centre.

2. Marketing

- Review trial of Diaspora Initiative.
- Achieve 60 actively selling tour operators
- Strategically review events calendar for 2030/2031. Consideration given to gradually altering events that have not gained international traction. This is to be carried out over two years to protect brand image.
    - Marathon uptake should be 150 participants and should be nearing break-even.
- Reduce peak season concentration 48%
- Review trade show strategy for ROI.

3. Capacity

- Expand MICE (meetings, conferences, events) product and capacity.
- Actively encourage tourists to complete exit surveys at airport and yacht club. Achieve 5% exit completion and 83% visitor satisfaction rating.
- Continually review Concierge Services in areas of operation.
- Complete Tourism Grading Initiative and ensure that all new operators are correctly registered and graded.
- At least 1 DMC company attends tourism trade shows as co-exhibitors.
- Successfully host six events in line with the six Pillar Strategy designed by Marketing in period 3.

30.6. TDP 8 (FY 2030/2031): Maturity

Arrivals Target: 4% growth

ADS: Expectation is that this should be £180-£200 per day.

ALS: Maintain whilst arrivals increase.

Key Milestones:

- Reach 90 serviced rooms capacity
- Achieve peak season concentration of 45%
- Reach 60 actively selling tour operators
- Achieve 85% visitor satisfaction rating
- Complete comprehensive long-term tourism strategy for 2030-2040
- Establish self-sustaining Tourism Development Fund model

31. Annex References

Annexes	Name
A	Aquilla's Arrivals Forecasting 2025-2028
B	Trade Competitor Analysis Marketing Budgets
C	Potential Tourism Product Development Areas on St Helena 2026 - 2031
D	Tourism Marketing Budget of Competitor Islands
E	Talking Stick Digital Marketing Proposal
F	Tour Operators selling St Helena
G	Big Ambitions Strategy 2025/26
H	TP3 and TDP4 Budget Comparison
I	Diaspora Initiative
J	Chamber of Commerce Engagement Report
K	Stakeholder Engagement Report

St Helena Government

Tourism Strategy and Delivery Plan

December 2025 - March 2031

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