



St Helena Tourism

Covid-19 Recovery
Strategy



CONTENTS

SUMMARY	3
CONTEXT	4
ASSUMPTIONS	5
TOURISM INDUSTRY FOCUS	6
RESTART TIMETABLE	7
THE STRATEGY	10
IMMEDIATE TO SHORT TERM	11
MEDIUM TO LONG TERM	15



SUMMARY

	IMMEDIATE	SHORT	MEDIUM	LONG
PROMOTION	<p>Armchair Tourism - bringing St Helena to your living room: Maximising St Helena's digital footprint covering St Helena's diverse selling points: "Positive Isolation" - "Living COVID -19 free" - Yachting - Whale sharks - SCUBA Diving - Walks - Bicentenary of Napoleon's death - History - Citizen Science - Community Engagement</p>		<p>Focus on St Helena's popular niche products: Yachting - SCUBA Diving - Napoleonic Bicentenary - Walking - Slavery and Abolition History Focus on St Helena's current popular geographical markets: UK and Europe</p>	<p>Focus on South Africa's high end market</p>
PRODUCT	<p>Maintain and enhance St Helena's current products: Post Box Walks and Paths - Dark Sky - Exile of Poll Tax (Zulu) Leaders - Slavery and Abolition History</p>		<p>Extend St Helena's high season: Qualifying Marathon - Marine Activities - Soft Adventure - Enhance the Dark history</p>	
EXPERIENCE	<p>Post Recovery Readiness by Private Sector: Updating information - Familiarisation with St Helena's Product - Training and Development - Accreditation Schemes</p> <p>Infrastructure Development: Maximising digital capacity - electronic payments - variety of currencies used Beautification of the island - enhancement to Wharf and Wharf Facilities</p>		<p>Implementation of Accreditation Schemes including Safety and Hygiene Best Practice ("SHT Assured ✓") Product Innovation support to improve quality of experience Wharf Refurbishment to allow maximised use for Marine Activities</p>	<p>Competitive fare prices and 'specials' to entice people to choose St Helena</p>

CONTEXT

During 2019, St Helena earned approximately £1.8m - £2.4m from international tourists and £2.4m - £3.3m from visiting friends and relatives. This is the highest contributor to the Island's economy from any single sector.

Contributing to this, St Helena saw growth of 24% in tourists between 2018 and 2019 and 15% growth in visiting friends and relatives. It was noticeable during the peak season of January to March 2020 the number of tourists arriving to St Helena for marine activities.

On 12 March 2020, the World Health Organisation announced that the COVID-19 virus increased to pandemic status. Soon after, South Africa, whom St Helena relied on as a gateway to the outside world, closed its international borders and grounded both domestic and international travel. St Helena followed suit, out of preservation for its small, aging, and vulnerable population, and due to its dependency on South Africa for air access.

Whilst this health response was vital to control the spread of the COVID-19 virus, St Helena being such a small island, felt the economic impact of the crisis, particularly in the tourism sector. This originated in March 2020, at the end of St Helena's peak season, therefore limiting the extent of the initial commercial impact.

UK Government, St Helena Government, Bank of St Helena and Enterprise St Helena collaboratively provided financial relief measures to allow most businesses to survive during this period. Some businesses also received a small amount of customer demand from the yachtmen that were in transit here as a result of sea ports being closed worldwide.

During the pandemic, St Helena received international limelight being one of the few places in the world that is COVID-19 free. Life on island continued as normal.

However, during this pandemic it has become clear that to recover St Helena's tourism industry and its economy as a whole, significant planning would be required. This includes planning for how St Helena manages the recovery phase which would dictate lead time for bookings, travel planning, industry upskilling, re-engagement with the travel trade as well as establishing COVID-19 safety measures.

This strategy is intended to guide St Helena's tourism industry in planning and implementing the Island's recovery as an emerging tourism destination.

ASSUMPTIONS ON TRAVEL

To plan an effective recovery, the strategy needs to be guided by parameters.

Air access

The strategy assumes that St Helena's gateway will remain South Africa. The most viable option is for flights to continue from Johannesburg and Cape Town (the latter being during the summer season).

The global impacts on the aviation industry as a result of COVID-19 are continuing. The Sector is undergoing significant change. This is being closely monitored through the development of an Aviation Strategy for St Helena to support the Tourism Recovery Strategy.

With reference to the most recent study completed by Aquila Aviation Limited, direct flights from UK/Europe will only be feasible for commercial services if the market price is attractive to the traveller. St Helena Government continues to gather data from the repatriation flights (flying directly between the UK and St Helena, with a fuel stop in Africa) to test this route's viability.

COVID-19 measures

People will not travel to St Helena as a holiday destination whilst quarantine measures are in place.

Whilst the UK Government has created travel corridors for a list of countries from where you can travel to England and may not have to self isolate, including St Helena, St Helena's quarantine measures remains for all visitors. These parameters are constantly being monitored. See St Helena Government's website www.sainthelena.gov.sh

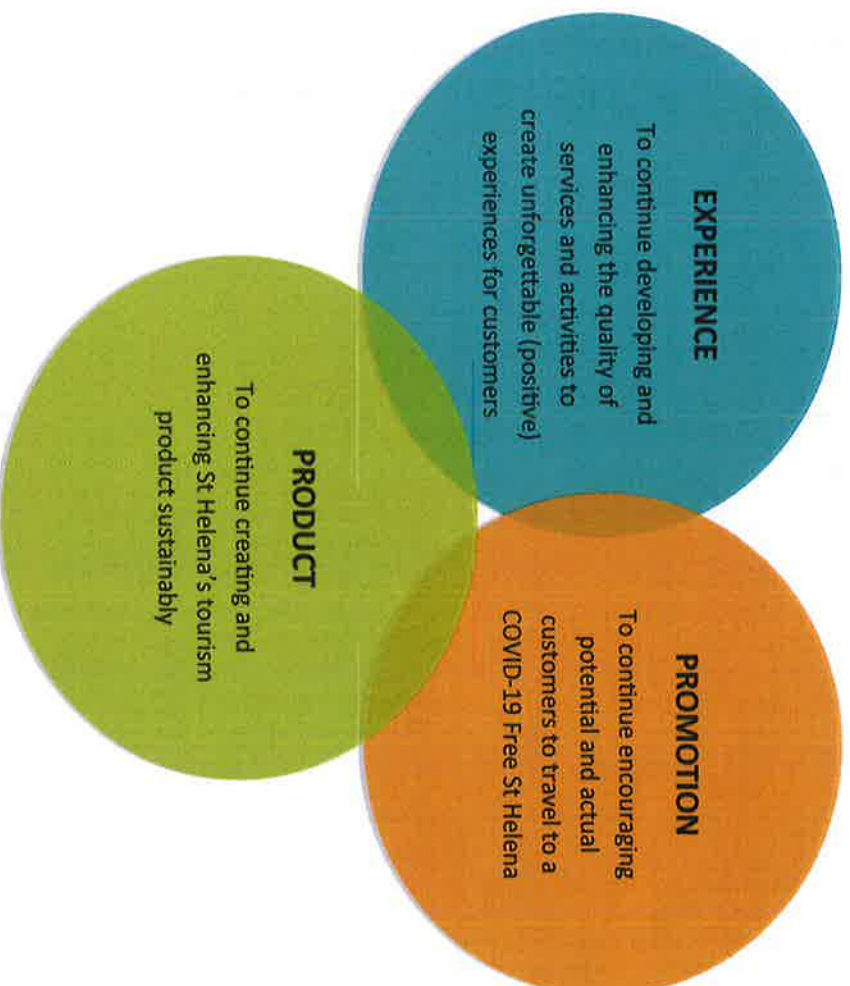
Insurance companies are slowly evolving their policy in response to COVID-19 and insurance claims related to coronavirus are now likely to be excluded from any travel insurance policy, as it is considered a "known event" that travellers are aware of. However some offer coverage for emergency medical costs and repatriation in the event that the traveller catch coronavirus whilst on holiday. There are a small number that are exception to this rule who have amended their policies to cover some types of cancellation claims, such a cancellation in the event that the traveller catch coronavirus or was exposed to someone who caught it and need to self-isolate.



TOURISM INDUSTRY FOCUS

Following the advice made available from the United Nations World Tourism Organisation, and discussions with various advisors - our aim is to recover. Therefore this strategy is intended for St Helena to resume tourism activity - building on the effort St Helena has already made with the international travel trade – **RECOVERY NOT START AFRESH.**

To resume St Helena's tourism sector, the island will need to continue focus on:



RESTART TIMETABLE

Predicting a timetable when the Island would restart travel for tourism is difficult and depends very much on how the world, in particular St Helena's target markets and air gateway respond to the COVID-19 pandemic.

St Helena Tourism has therefore put forward a phased approach, operating a timetable of immediate to Short Term and Medium to Long Term.

Whilst St Helena Tourism will try its best to provide a timeline to the phased approach, the timeline will change as new information and decisions are made worldwide and locally. This is a period of uncertainty the world over.

SHORT TERM	MEDIUM TERM	LONG TERM
March 2021	December 2021	December 2024



IMMEDIATE TO SHORT TERM

The here and now whilst the world is responding to the COVID-19 virus in the short term.

As at September 2020, short term is estimated to March 2021.

This is based on:

- Whilst South Africa has relaxed their lockdown restrictions to level 2, allowing limited domestic flights within the country, international flights are not expected to resume until the country moves to a level 1 or 0. It is currently not known when this will happen. Therefore, our assumption is that there will be no scheduled commercial air service to the island within the next 3 months.
- The current disruption to the normal commercial air travel based on government advice provides only repatriation flights and medivac flights.
- Any foreign national is allowed to enter St Helena, subject to the established immigration rules, quarantine regulations and testing requirements.
- There are quarantine restrictions for entry. See St Helena Government's website www.sainthelena.gov.sh
- Marine vessels will be allowed to enter port and the crew subsequently permitted to enter St Helena after they have completed 14 days' quarantine, display no COVID-19 symptoms and as an extra reassurance have tested negative for COVID-19 on the 14th day of quarantine. The 14 days will be counted to include days spent at sea (based on official ship's records), days spent quarantined on a vessel in St Helena waters or days spent quarantined at the Island's local quarantine facility (or other suitable location).
- *A mutual recognition exemption from quarantine may be possible for those countries and territories that St Helena recognises as COVID-19 free (e.g. Ascension, Tristan da Cunha and Falkland Islands).*

During this time, it is important for St Helena to remain in the forefront of potential traveller's minds. Surveys indicate that people will want to travel again, and are currently home reminiscing over past holidays and thinking of future destinations. The St Helena Tourism enquires also provides evidence of people querying when St Helena will reopen and how to travel to the Island.



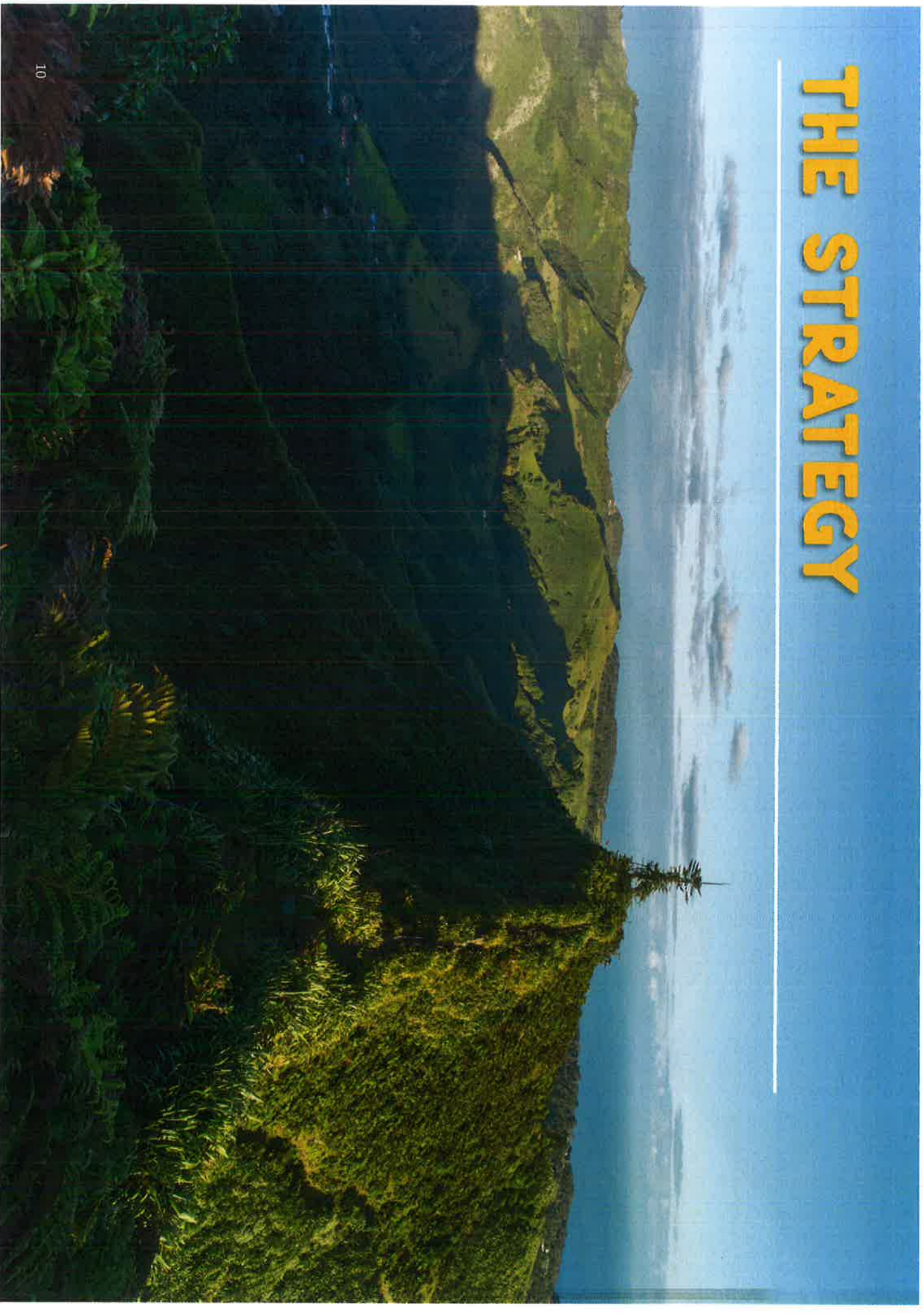
MEDIUM TO LONG TERM

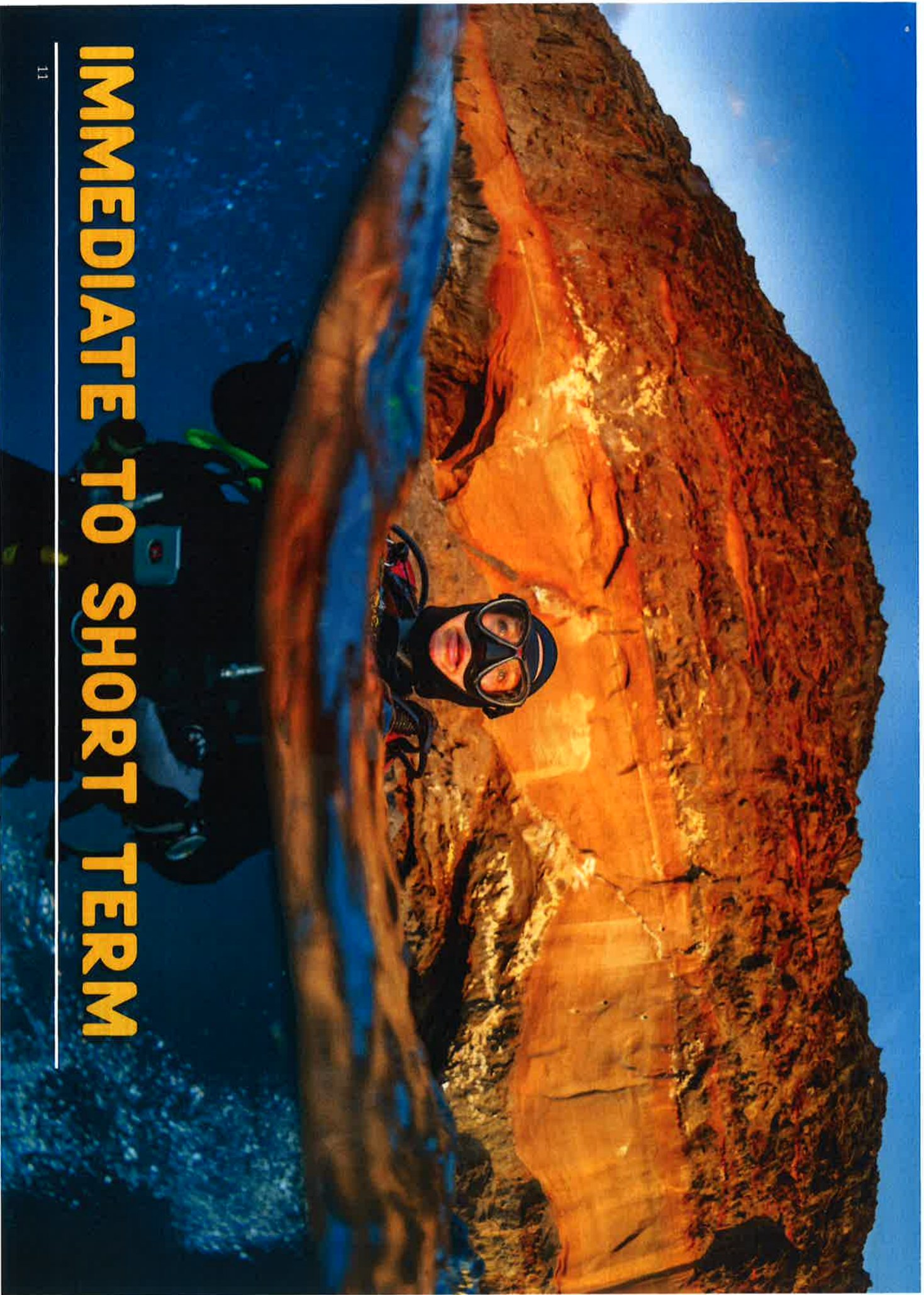
This is based on:

- The regular flight schedule resuming.
- The opportunity for alternative routes will be explored as part of long term aviation planning for St Helena.
- As at September 2020, the gateway remains South Africa and uses Johannesburg during the low season and Cape Town during the high season.
- There are no quarantine requirements.
- A safety and hygiene Assurance scheme is in place ('SHT Assured ✓').

Medium to Long Term is estimated as from December 2021, with the numbers starting to be more confident during St Helena's peak season of December 2021 to March 2022.

THE STRATEGY





IMMEDIATE TO SHORT TERM

PROMOTION

In the immediate to Short Term St Helena needs to remain in the minds of potential travellers', as an attractive destination. With the limited budget available, St Helena's promotion needs to be targeted and focused on niche products.

St Helena Tourism will focus on Armchair Tourism – bringing the world into your living room. The aim is to maximise the capabilities of St Helena's current digital connection to engage with those sitting at home by creating virtual experiences and increase interest through a fresh brand management.

This is an appropriate time to develop and enhance St Helena's digital footprint through:

- Refurbishing websites
- Updating digital information
- Creating interactive Apps e.g St Helena National Trust's upcoming Whale Shark tracking App
- Creating experiences through tours, webinars and live events

Armchair Tourism will cover St Helena's diverse selling points, but in particular will sell a key message of St Helena being able to keep the Island COVID-19 free.

- "Positive Isolation" covering digital detox
- Yachting
- Whale sharks
- SCUBA Diving
- Walks
- History
- Bicentenary of Napoleon's death
- Citizen Science – Stargazing, marine studies etc where the public engages and assists the professionals
- Community engagement – sports, events etc



PRODUCT

For the period of the Immediate to Short Term, St Helena's existing tourism products will need to be maintained and those that are work in progress to be continued.

These products include:

- Green Flag Accredited Post Box Walks and Footpaths
- International Dark Sky Accreditation
- Poll Tax Rebellion Leaders Exile on St Helena
- Trans-Atlantic Slave Memorial
- To review the cruise ship packages that are currently available with a view to expand

COVID-19 Free Bubbles

St Helena could explore the opportunity to create COVID-19 free bubbles. St Helenians working on Ascension and the Falkland Islands could visit home and residents living in other COVID-19 free destinations could holiday on St Helena.

From the data collected since the start of commercial services, the number of visiting Friends and Relatives is higher than tourists, and contributes significantly to the tourism revenue stream. Exploratory conversations have started with Guernsey and Isle of Man governments on the possibility of creating safe corridors.

St Helena could offer:

- 'Winter Sun' Vacations
- Hotel staycations
- Marine and Land Based Tours
- Eating Out
- Community Engagement – sports, events

During this period our own people, namely visiting friends and relatives will benefit the viability of local events and also develop our products and services. For example; Festival of Lights and St Helena's Day celebrations.



TRANS-ATLANTIC SLAVE MEMORIAL
ST HELENA



EXPERIENCE

Industry

The Immediate to Short Term is a period of uncertainty for the Island and for businesses that rely on tourism. St Helena will need service providers to survive the pandemic. Financial support packages therefore need to be constantly reviewed and made available to those areas of the private sector which are directly impacted. This will include project funding to enhance the experience being offered to tourists.

This includes:

- Private Sector updating their information, offering and packages including reviewing their prices
- Private Sector familiarising themselves with activities and other products available
- Private Sector training and development to qualify tour guides, improve food and beverage and most of all recognise everyone as a customer
- Accreditation schemes are developed and implemented to ensure service providers meet international standards. This includes a hygiene and safety assurance scheme ("SHT Assured ✓").

In readiness for the recovery stage or Medium to Long Term, St Helena needs to turn the interest into sales. Review of the sales funnel is needed with the aim of making the booking experience as simple as possible. The conversion process from being interested in visiting the Island to making a physical booking and payment for flights,



accommodation, tours etc, needs to be seamless.

The new normal following the COVID-19 pandemic is to minimise contact where possible. Countries are therefore reducing the amount of physical transactions. St Helena, within its current parameters will need review and implement contactless transactions.

Requiring:

- Electronic payments
- Acceptance of different currencies on a regular basis
- Digital communication for digital information and bookings

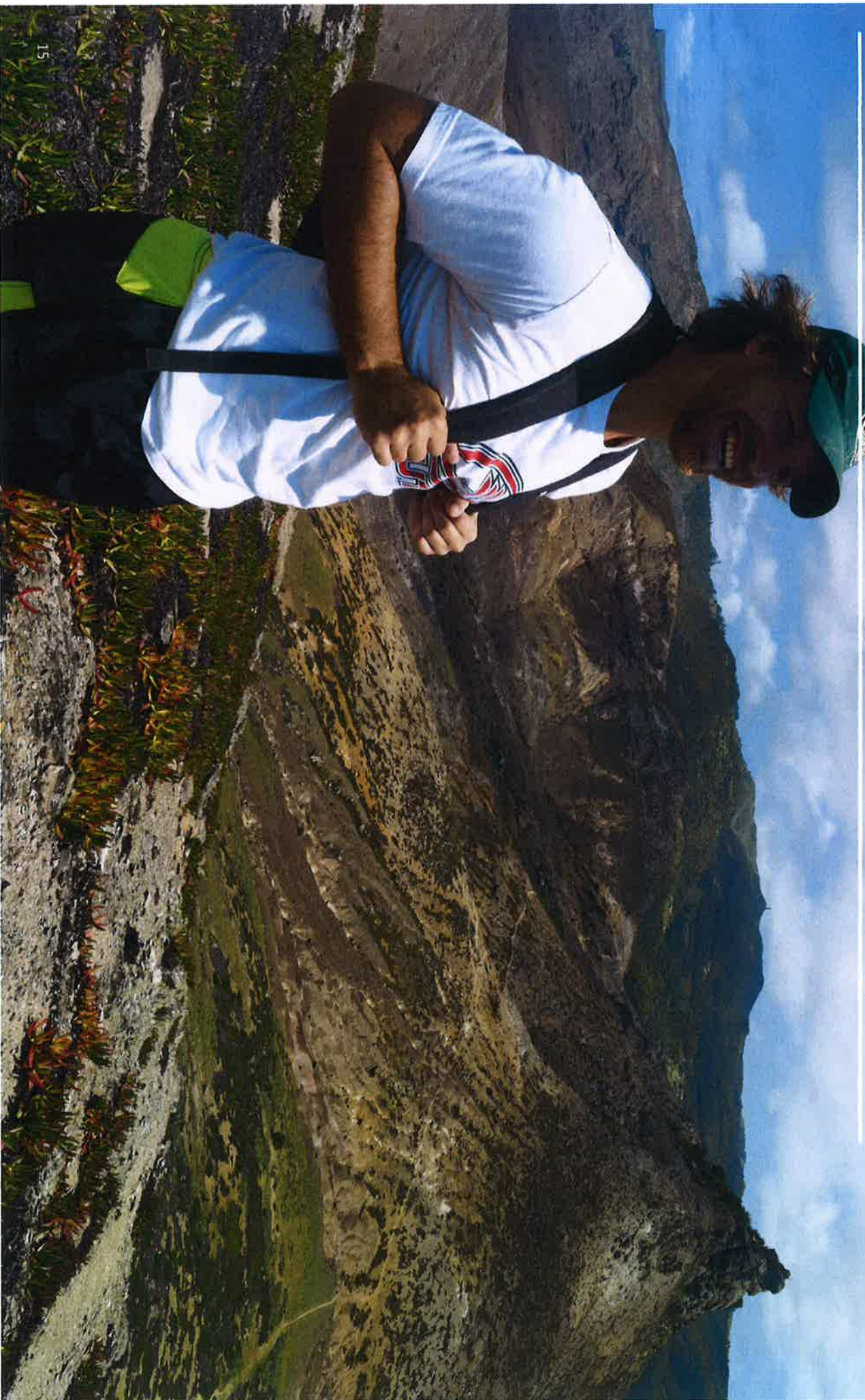
Infrastructure

Whilst the industry uses the Immediate to Short Term to prepare their business offering, the island's infrastructure and facilities could also be refurbished and enhanced, using this down time for beautification projects.

With yachting being one of the markets that can continue to visit during the short term, ensuring the amenities at the wharf are refurbished is essential.

Air access will need constant review, in particular the cost of the flight to the Island. In the eyes of a tourist, travel to St Helena is expensive, especially when they are making comparators to other destinations. Whilst it is recognised that St Helena is not a cheap destination, to grow its tourism industry the Island must become competitive with established destinations.

MEDIUM TO LONG TERM



PROMOTION

Product Promotion

To encourage visitors to the Island post COVID-19, St Helena needs to concentrate its focus on a select few niche products including those that were bringing the numbers to the Island prior to the pandemic.



Yachting

Following on from the immediate to Short Term, yachts have always been consistent visitors to the Island (approximately 600 - 700 per year) and during the pandemic took refuge at the Island.

Scuba Diving

Scuba diving was proving to be St Helena's biggest tourism product prior to the pandemic. Scuba Divers select a holiday destination based on their diving interests and to experience as many different dive locations as possible. Scuba Divers will be driven by their bucket list, and we need to ensure that we feature on this.

Positive Isolation

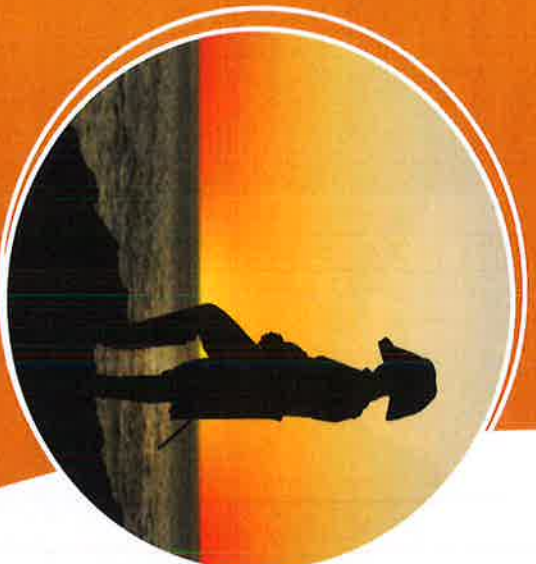
At present St Helena is COVID-19 free. Whilst surveys indicate that the general visitor may not be interested in long haul travel at the outset of the recovery, when people start to take interest again, St Helena lends itself to being considered a 'safe haven'. With a limit on the number of people that can access the Island on a weekly basis and taking into account the small island population, positive, safe isolation will be a key selling point in helping people make holiday decisions. A destination offering 'Digital Detox' would also attract visitors that have been stuck at home with only the internet for company. With the island's limited internet capacity, visitors can take a break from technology and connect with nature.

Walking and Hiking or the soft adventure

Whilst data is constantly changing with regards to what groups of people will start travelling first, it is felt by the travel trade that the 40 – 59 year-old adventure travellers will be first. Combining St Helena's diverse natural environment, with its rich history and 'positive isolation', the Island would appeal to such travellers.

Napoleonic Bicentenary

During the Medium Term the 200th anniversary of the death of Napoleon will occur. St Helena will need to capitalise on marking this occasion internationally. Whilst there is a varied opinion of Napoleon, the world knows of this historical figure. St Helena therefore needs to ensure the world knows and becomes captivated with his final place of exile.



PROMOTION

Geographical Markets

At the outset of the Medium to Long Term, St Helena will continue to focus on the UK and European markets. These were the natural markets that St Helena saw the highest number of visitors prior to COVID-19. In order for St Helena to maximise the use of the funds being made available for promotion it would be prudent for St Helena to focus on saturating these markets, before allocating resources to new ones.

Whilst South Africa is St Helena's gateway, due to the currency exchange, St Helena is an expensive destination for the average South African. The pandemic has also hit South Africa hard and their economy is currently struggling. However, in the Long Term marketing efforts can be made to target the high end South African residents with the products that St Helena has to offer. St Helena will need to procure services within South Africa to assist with penetration of this market.

Such as;

- Sports Fishing
- Scuba Diving
- Exile of the Boer Prisoners of War
- Unique flora and fauna
- Positive Isolation



PRODUCT

Analysis prior to the COVID-19 pandemic identifies St Helena as a seasonal destination, with the high season being approximately 4 months between December and March. Review of products will need to be undertaken to determine how the high season can be widened. For e.g. November to May.



A few products that can be developed to extend the high season are:

- Internationally recognised qualifying marathon – world's remotest marathon
- Enhancing the marine product with activities such as snorkelling, kayaking, free diving, sports fishing
- Enhancing the soft adventure with mountain biking, the 'Great St Helena' trail with camping and home hosting
- MICE (Meetings, Incentives, Conferences and Exhibitions) Tourism

St Helena recognises that it has a diverse range of products that can be offered for tourism, and products that can gain significant international attraction are:

- **Dark history, including slavery and abolition history**
- **East India Company Heritage**
- **Exile of the Boer Prisoners of War**
- **St Helena Genealogy Tourism**

EXPERIENCE



Industry

Following the Short Term financial support packages, there needs to be a continuation of project innovation support to assist businesses with improving the quality of experience. This period would be appropriate for incentives being offered to help businesses during their recovery up until they start receiving an income.

Whilst the Immediate to Short Term period is spent by businesses readying themselves for the recovery period, it is expected that training and development will take place and, accreditation schemes will be implemented. These schemes will be implemented within a phased approach to allow businesses the opportunity to receive an income whilst gearing up.

Infrastructure

Development of infrastructure needs to continue, especially with the continuation of improvements to the wharf facilities. St Helena has agreed that marine is currently the largest tourism product and the Island needs to have the appropriate facilities to showcase the product.

In the Medium Term St Helena will need to compete with established destinations to receive visitors again. Prices of flights will need to be competitive, and St Helena will need to offer 'specials' to encourage people to choose St Helena, for example; a complementary meal, local wine on arrival or '7 nights for the price of 6 nights' or group (tour) discounts.

HOW DO WE GET THERE?

How we get there, is based on the current assumptions. If changes are made, this will impact the strategy.

PROMOTION

Maximising digital capacity and creating campaigns for the different niche products through:

- Collaboration with the Private sector
- Attracting and maintaining significant influencers
- Engaging with significant media
- Creating content using specialists
- Continue to build intelligence on the key country markets, cross referencing the demographics and niche product
- Speak direct to the consumer markets
- Engage with St Helena's gold group of tour operators
- Develop South African market base

PRODUCT

- Contract Post Box Walks and Footpaths maintenance as per Green Flag Accreditation
- Contract maintenance of St Helena's picnic areas
- Legislative Council to approve Dark Sky legislative requirements
- Build monument to commemorate the exiled Zulu Leaders, using Non Government Organisation collaborations
- Executive Council to approve the Trans-Atlantic Slave Memorial Master Plan
- Create Citizen Science community projects
- Create events to extend the high season
- Apply for qualifying status for the remotest marathon
- Engage with the community to create the "Great St Helena" hiking trail
- Create Mountain Bike trails using Non Government Organisation collaborations

EXPERIENCE

- Private Sector updating their information and familiarise themselves with local products
- Engage with international bodies and local sectors to create local Accreditation Schemes and implement
- A programme of training and development is undertaken by the Private Sector
- Make available innovation project funding
- Executive Council approves refurbishment of yachting facilities
- Executive Council approves Wharf Development Project Plan
- Create competitive fare price specials

PRODUCED BY



St Helena Island

SECRET OF THE SOUTH ATLANTIC



PHOTOGRAPHY CREDITS:

WILL APPELYARD

DES JACOBS

MATHIAS FALCONE

ST HELENA TOURISM

WHAT THE SAINTS DID NEXT

DARIN DES VIGNES

EDWARD THORPE

ROBYN SIM

RAINER SCHIMPF

LIONEL JOSHUA

CATHY TONKS

BOARD APPROVED SEPTEMBER 2020

