

St Helena Tourism

Brand Strategy and Plan

Marketing Manager, St Helena Government
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St Helena Island
A breath of fresh air

Summary

Organisation

St Helena Tourism (Tourism) was wrapped into the services of St Helena Government (SHG) in April 2021, after closure of Enterprise St Helena, the organisation that previously operated tourism and tourism marketing for St Helena.

Tourism and marketing are now operated as government services, although medium-term works to establish a Tourist Board and divest tourism to the private sector are underway.

As tourism is the island's largest export (garnering £5-£6K in the year pre-pandemic – more than double all other exports combined), brand performance for Tourism is critical for the island's revenue.

The Visitor Information Services function, with a dedicated staffing of two, operates the Tourist Office and its services: Providing visitors (whether returning Saints, pure tourists by sea, pure tourists by air, business travellers etc) with the information and assistance needed to get the most out of their stay and simultaneously maximise on-island spend. Its customer service touchpoints include the Tourist Office, website, hiking trails maintenance, digital communications (emails, social media, webinars), brochures, events, DMC and tour operator liaison, tourism infrastructure development, booking and advice.

Marketing and promotion for St Helena Tourism is also undertaken by SHG's Marketing function, a

one-person function splitting time across the public service. Tourism marketing raises awareness of the island and its products, services and attractions, and attempts to increase visitor numbers and revenue using a paid/owned/shared/earned marketing mix across print and digital activities and touchpoints.

Audience

Tourism exists within the international travel-trade market. More specifically, Tourism markets to those who have visited, are currently visiting or are most likely in future to visit St Helena.

As of 2022, St Helena mainly attracts persons who are:

- Well-travelled
- Higher-income
- 35+
- Soft adventurers
- Saint diaspora, British or South African

St Helena's visitor base is also motivated by certain niche interests, including bird lovers, history buffs, hikers, and divers.

'Customer loyalty' – when a consumer builds enough trust to not only 'purchase' but to do so time and again – is accepted as a later-stage result of a successful brand and therefore Tourism should focus marketing efforts on consumers with greatest likelihood of loyalty. **Yachts and ships** tend to transit the same routes time and again, and find St Helena a strategic repeat stopover. This customer segment has remained especially stable in comparison to other groups during the pandemic. **Visiting friends**

and relatives hold emotional attachment to St Helena and therefore visit repeatedly, bringing significant visitor revenue year-on-year. Each **tour operator** working with St Helena sends groups of tourists to the island time and again. This segment brought 75% of 2019's pure tourists, meaning better Return-on-Investment for engaging tour operators than individual travellers. **Potential new customers** are important for maintaining awareness and assisting the tour operators' customer demand for St Helena.

Market competition

St Helena's main competitors are identified based on recent reports (eg Aquilla) and on certain factors and categories. Competitor analysis shows that market competition is tough and St Helena's resources are comparatively limited. Other locations have brands and air access have existed longer; they are better known in the market; and they have more 'typically attractive' assets such as sandy white beaches, resorts, and affordability of access and connectivity.

St Helena (baseline): One airport, one airline, weekly flight. About 4,260 visitors/annum (2019). Key features: Island, remote, tranquillity, nature, marine, environment, wildlife, temperate, British.

Montserrat: Similar size, population and climate. British OT. One airport, two airlines, daily flights. Tourism from 8,940 (2015) to 20,000 (2019) – majorly due to cruise ship increases.

Mauritius: Far larger area and population. Not British but similar attractions. Much cheaper flight prices and options. About 1.3m visitors/annum.

Seychelles: Much bigger size and population. Much cheaper to reach, more accessible. About 428k visitors/annum.

Christmas Island: Similar size, smaller population. Australian territory. Similar climate and attractions. Three weekly flights. About 2,000 visitors/annum.

Cook Islands: Larger area and population (nearly 4x).

Similar climate and attractions. Air access strong, with daily high-capacity international flights. About 100k visitors/annum.

Competing as an island destination that lacks the strengths and opportunities of other islands, means St Helena must identify and clearly communicate the things that set the island apart – the things that make the island different. St Helena's rareness, and the wealth of non-substitutable experiences offered, are competitive advantages that could help n potential visitors decide to 'book' St Helena.



Situational analysis



Tourism is operating in a volatile macro-environment. In 2022, this mainly had to do with the COVID-19 pandemic and its effects; global inflation; and the war in Ukraine. Volatility also arises from the island's reliance on UK funding.

The local environment is also challenging, as the same unique features that give St Helena its 'charm', create risks and barriers for development. St Helena's remoteness, mountainous terrain and aging population demographics create unique economic and resource complexities. Technological advancements are slower than in much of the world, with cell phones for instance introduced only in late 2015. Today, the island does not have true international banking or ATMs, and struggles with some of the costliest internet on Earth.

Prior to the commercial passenger opening of St Helena Airport (HLE) in 2017, the island was only accessible by a (approximately) monthly five-day ship voyage from South Africa: Therefore St Helena only really 'emerged' as a tourist destination, and began marketing and building a tourism sector, a few years ago. Visitor numbers increased year-on-year until early 2020, when the COVID-19 pandemic hit. From then until late 2022, flights and tourism were essentially paused. Accessibility in late 2022 increased back to a weekly six-hour flight from South Africa (JNB), with weekly peak-season flights possibly resuming in 2025.

Essentially, St Helena emerges from the pandemic still being a 'new destination', which is still in the foundational stages of building its brand.



Vision

Maintain St Helena's unique market position by showcasing "the St Helena difference" – showing the island as a great and unique place to visit, therefore assisting to return visitor numbers and revenue to pre-pandemic levels by 2025.

Objectives

1. Fully implement brand strategy and plan, in order to help differentiate St Helena as 'a great place to live, learn, work, visit and invest', by March 2023
2. Establish baseline brand awareness, strength, and positioning metrics, to allow analysis of brand performance, by March 2023
3. Maintain baseline brand awareness of approximately 100k/month, via paid/shared/owned/earned marketing mix in relevant platforms, publications, target audiences and niches

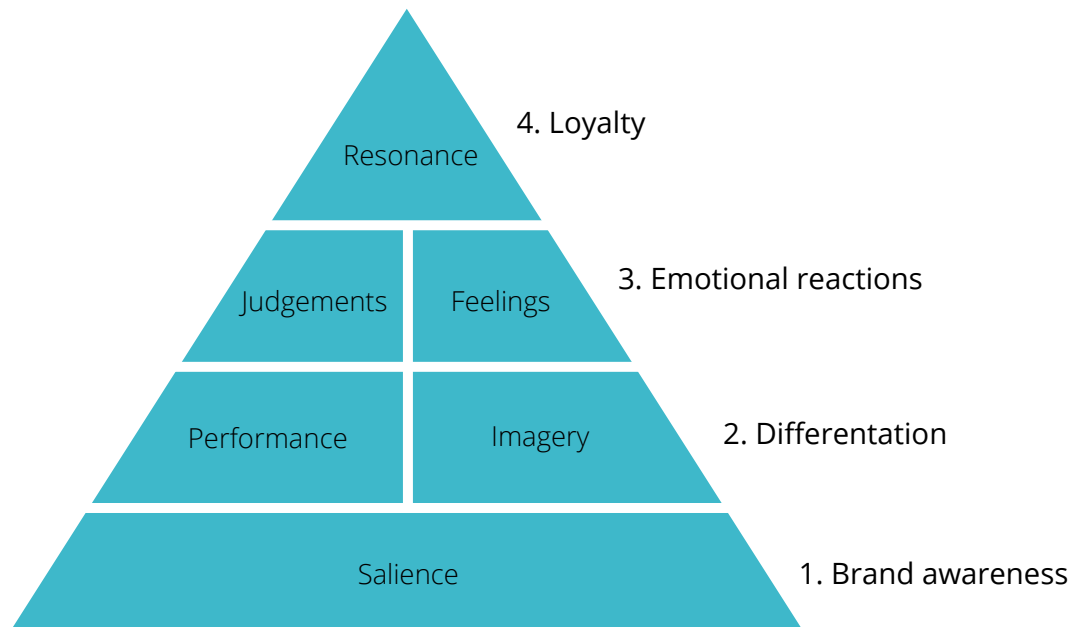


Strategic direction

The way that a brand is 'built' moves from bottom to top in the Brand Resonance Model (below):

Focusing on differentiation makes strategic and competitive sense for Tourism's first brand strategy, as it is a foundational stone for achieving objectives.

Therefore, Tourism should maintain baseline awareness while having a strategic focus on maintaining St Helena's market position through differentiation.



1. Research and data shows St Helena's market position is naturally unique.
2. This uniqueness – the 'St Helena difference' – is evaluated as the destination's greatest strength.
3. Emphasizing this unique market position, will allow the brand to remain authentic and better connect with audiences.
4. Differentiation "is the single most important contributor to a brand's success".
 - a. Especially important as this is St Helena's first brand strategy: Differentiation will allow a firm foundation prior to more developed/aggressive marketing strategies (eg sustainability, partnership, customer experience).
5. Differentiation "directly affects short-term profitability and long-term viability," enabling achievement of aims, goals, and objectives.
6. Strategically, differentiation aligns with the 'sweet spot' where Tourism's capabilities meet consumer needs, are feasible, and don't overlap with competitor offerings. (Getting the best ROI and lowest possible costs.)

Strategic actions

The following strategic actions centre around maintaining St Helena's market position via differentiation, and assist in meeting strategic objectives:

1. Update all collateral and touchpoints to match new branding
2. Ensure marketing mix promotes 'the St Helena difference' – the unique value that revolves around being a 'breath of fresh air' in today's world
3. Showcase key offerings, activities, experiences to key audience segments (those with good chance of loyalty) on their preferred platforms
4. Ensure emotional connection in all activities, communicating specifically, clearly and accurately to individual customer segments
5. Improve alignment between "the promised experience" of St Helena Tourism and the real "performance" (for instance by updating online information to better match the local realities)



Market position (Brand St Helena)

'Differentiating' St Helena in the marketplace – focusing on the unique aspects that set St Helena apart from other destinations – is a foundational stone for increasing visitor numbers and revenues.

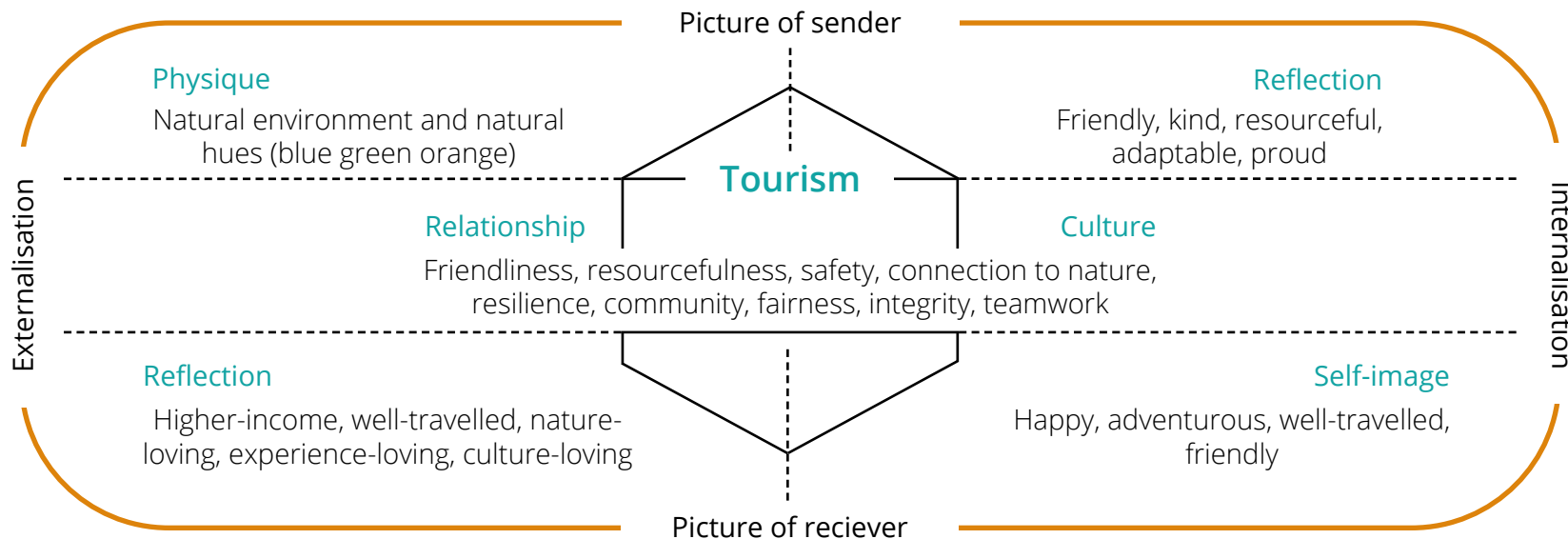
Aligning this differentiation with the values, needs and goals of the local community ensures authenticity (important for connecting more deeply with consumers) and sustainability (long-term brand health).

Key reports over the past few years – notably the end-of-ESH report and the Aquilla report – noted that true brand-building had never taken place for St Helena Tourism, and recommended it as a priority.

Therefore, beginning in 2021 qualitative research methodology was carried out, to gather the opinions of the community and stakeholders (such as former visitors), to understand 'the essence of St Helena' as defined by the people, for the people.

This was aimed to ensure authentic brand results and greatest buy-in. The research sought to understand how people perceive the island; what their goals are for the island; and what they believe makes St Helena so special – allowing Tourism to really understand its customers, and to accurately identify the unique qualities that people most associate with, and love about, St Helena.

Essentially, as Tourism is closely and innately tied to the island, understanding the market position that the island holds naturally in peoples' minds, is also the foundation for understanding the 'essence' (positioning) of the Tourism brand:





Results show the island holds a distinct market position that is naturally 'different' to other destinations; comprised of a multitude of assets and attractions not found anywhere else on Earth, combining into the 'St Helena difference', summarised in the island being 'a breath of fresh air' in today's world.

The results are being compiled into a Brand Book to be used across the public and private sectors; and have informed Tourism's first brand strategy, plan and metrics.

This brand-building is aimed to benefit the island financially through increased visitor numbers and greater Return-on-Investment for brand activities; as well as socially through improved consumer relations and alignment with community perceptions: Ultimately making the island a better place to live, learn, work, visit or invest.

Brand positioning

Understanding St Helena's unique market position, allows Tourism to then position its brand in accordance with that market position.

Strong brand positioning is important as St Helena is a high-involvement consumer decision (a complex and lengthy decision-making process compared to easier/cheaper/better-known destinations); and as the island does not have 'typical' destination differentiators such as affordable and frequent flights or sandy white beaches. Therefore, brand positioning is critical to increasing the likelihood that consumers will recall and build loyalty with the brand.

Ensuring strong brand positioning, through both rational and emotional elements that allow people to connect emotionally and see rational reasons to 'book' St Helena, enables Tourism to maintain St Helena's unique market position by embodying and communicating 'the St Helena difference'. Kapferer's Brand Positioning Prism shows Tourism's positioning:

The brand for what?

To provide **'a breath of fresh air'** via our safe, welcoming, bucket-list island

The brand for whom?

Intrepid, nature-loving and culture-loving travellers

The brand for what?

Unique culture, location, history, heritage, natural environment, attractions

The brand for whom?

The 'typical, highly travelled' destinations that are less unique, less based on natural environment and have less down-to-earth cultures

Attributes

Attributes of a brand are like attributes of a person – they are things, tangible or intangible, that give impressions of character and personality.

They are important for ensuring that brand position is consistent and clear.

Prior to 2022 Tourism possessed some strong brand attributes: A logo symbolising the shape of the island and the landscape's dominant colours; a few design elements; a list of niche attractions (geography, people, history, culture, and outdoor adventure); and emotional benefits (discovery, adventure, escape). These have been maintained as they aligned with Brand St Helena findings. Other brand attributes however were non-existent or confused. These remaining attributes are a mixture of functional and emotional attributes that had to be established, and include:

Authenticity:

One attribute that brand implementation should be able to strengthen, is the authenticity of the brand. As brand-building has been based on consumer perceptions of the island, the brand now focuses on what is authentically perceived: People rather than technology, nature rather than infrastructure, personal growth and mindfulness rather than work and stress. These elements perform especially well in the modern zeitgeist, and via social media. However, this authenticity must be consistent across all consumer touchpoints or – like a person losing faith in another person after seeing an action they

did not respect – consumers will not build trust.

Performance:

Tourism promises to provide visitors a breath of fresh air. However, a weak customer service experience would put this important attribute at risk. The biggest risk to delivering the “promised” brand performance, is the capability of the island's infrastructure to facilitate the recovery of tourism. For instance, while Tourism's own email marketing might be strong, local providers may not have the capabilities/resources to convert consumer enquiries to purchase.



Personalisation

A critical aspect of ensuring consistent and clear brand positioning is personalisation. To resonate strongly with customers, tailored messages are important: For instance marketing differently to yachting customers than bird watchers (always however maintaining brand consistency).

Personalised messaging helps attain emotional connection and resonance. This is true across social media, emails, video, web, and affiliate marketing – where content emphasises specific benefits relevant

to the target audience.

As an example of how Tourism can enhance personalisation, a 2020 advert placed by the previous Tourism brand onto the leading yachting website Noonsite featured only the text “St Helena Awaits You” and an image of a tree fern. However, this text and image did not portray personalisation to the yachting audience – AKA did not communicate any benefit St Helena specifically offers this demographic. In 2021, Tourism updated the advert to portray yachting-specific benefits

offered by St Helena, and feature an image related to yachting:



2020 ad



2021 ad

Core brand elements

A brand is comprised of intangible “core elements” that differentiate it from other products and services that serve the same need. These core elements are linked to the brand positioning.

In terms of the usual nine core brand elements, the table below documents what already existed within SHG; what already existed within Tourism; and the new Tourism brand elements. The new elements

align Tourism more closely with SHG, and are based on Brand St Helena findings:

Core element	What already existed in SHG	What already existed in Tourism	New Tourism elements
Purpose ('why' do we exist?)	To improve the lives of all within our community and help the island thrive		To improve the lives of all within our community and help the island thrive
Vision	A sustainable environment that creates opportunity and inspires social and economic progress, ensuring a better quality of life for all		St Helena - a great place to live, learn, work, visit and invest
Values	Fairness, Integrity, Teamwork	Preserving our authenticity. Sharing our treasures. Focusing on value rather than volume. Welcoming the Saints Way.	Authenticity, community, environment.
Market			The global destination market
Audience			All potential visitors,
Goals	<ol style="list-style-type: none"> 1. Altogether safer 2. Altogether wealthier 3. Altogether greener 4. Altogether healthier 5. Altogether better for children and young people 		<ol style="list-style-type: none"> 1. Attract and maintain interest in St Helena, in order to inspire people to live, work, visit, or invest in the island, on both a local and an international scale 2. Return visitor numbers and revenue to pre-pandemic levels by 2025
Personality		Mysterious, dramatic, multi-faceted	Kindness, Caring, Friendliness, Resourcefulness, Adaptability
Voice			Friendly and welcoming; nature-loving; proud to be Saint; valuation of close-knit island community; down-to-earth
Tagline	3. St Helena - a great place to live, learn, work, visit and invest	Secret of the South Atlantic	A Breath of Fresh Air

Key considerations help determine whether the core elements comprise the strongest possible brand – a brand that ensures St Helena’s market position can easily be maintained via differentiation. The following considerations helped establish, and will continue to help monitor, the core elements:

Consistency: Are all the core elements consistent with each other? This is important as consumers don’t otherwise build trust with a brand.

Emotion: Can the core elements effectively elicit genuine emotional connection with target audiences? Personality, voice and tagline are especially relevant here – and are strengthened by being authentic, as this allows ‘natural’ connection and emotion rather than ‘forced’. Visiting St Helena is an emotionally fulfilling experience – a breath of fresh air – offering ‘solutions’ for those looking to step back in time; to disconnect from technology and reconnect with what really matters in life; to go off-the-beaten-track; to be enveloped in a tight-knit, immensely safe community; to trek through a globally important environment; to relax. As St Helena’s has some significant weaknesses in the rational realm (cost and infrequency of travel options), emotional connection (‘soft branding’) is especially important.

Flexibility: Are the core elements unrestrictive enough to allow creativity and adaptations over time?

Employee involvement: Do the employees believe in and embody the brand? If not, the brand cannot be successfully implemented. A lack of employee

involvement across the portfolio may be a risk to implementation, especially as the values are perceived to be misaligned with the other brand elements and with the reality of internal workplace culture.

Loyalty: Are the elements clear and consistent enough, and aligned with the brand position well enough, to allow consumers to build loyalty with the brand?

Competitive awareness: Are the core elements sustainable for the brand to up-keep, and relevant to target audiences? Of importance for Tourism is the authenticity of the elements; the fact that the elements tie in with long-term trends and interests (sustainability, wildlife, culture); and the fact that the core elements can be up-kept even given restricted resources and capabilities.



Monitoring

A cyclical process is applied: Assessing brand position and values, implementing marketing programmes, analysing performance, and growing brand performance.

Reviews should take place six-monthly, the shortest feasible time frame, led by the Marketing Manager.

Performance analysis includes reviewing activity statistics, consumer feedback and reports from contracted PR companies.

The Brand Metrics Dashboard will be the most visible ongoing monitoring mechanism, compiling the most relevant metrics for tracking brand performance and achieving objectives.