



# St Helena Government **Tourism Recovery Strategy**

2022 - 2024



St Helena  
Government



*St Helena Island*  
A breath of fresh air

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# 1. Executive summary

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As a small, remote island with a small population (4,439) and no volume exports that can sustain or grow the island's economy, St Helena must rely upon a diversity of revenue generators rather than being able to 'put all its eggs in one basket.'

However, out of that diversity of revenue generators, tourism has been identified as a key driver for the future economic development of St Helena – especially as pre-pandemic, the island's fledgling tourism sector had already become the largest revenue-earner after UK aid.

St Helena's first (and only) airport opened in late 2017, with weekly commercial flights operated by Airlink. What was previously a 5-day journey by sea from Cape Town became a 6-hour flight from Johannesburg.

After the airport opened, arrivals began to steadily increase, at a pace sustainable for the island's infrastructure and services to handle. This was accompanied by growth in the number of tourism and hospitality businesses.

Leisure tourist arrivals grew by 24% between 2018 and 2019, and Visiting Friends & Relatives (VFR) by 15%. World-class scuba diving opportunities and unique whale shark aggregations between January and March were a huge draw for visitors, resulting in an increased demand for marine activities during peak season (which occurs in December to March, during St Helena's summer).

Pre-pandemic, the provision of services to visitors had grown into St Helena's biggest export sector. In

2018/19 the export of services (visitation expenses of tourists and non-residents) was 11.9% of £47.7m (total receipts), the second biggest contribution after UK financial and capital aid (83.1%).

Of course, in March 2020 the global spread of COVID-19 forced the island to close its borders. With travel restrictions and stringent quarantine protocols in place to prevent the introduction of COVID-19 into the community, visitor arrivals decreased dramatically in those two to three years, with almost no leisure tourists and reduced VFR.

In August 2022 St Helena's COVID-19 entry restrictions were lifted, allowing the island to 'reopen' and St Helena Tourism to finally say once more that "we are open, book now!". In October 2022, the Airlink flights that had been suspended during the pandemic were reintroduced, once again making travel to the island much more visitor-friendly.

Following the announcement that the island was reopening, tour operator feedback and early indicators from local Destination Management Companies (DMCs) showed strong interest for diving, with interest in other areas (general, historic, hiking) picking up for peak season 2022/23, with some forward bookings for 2023/24.

Analysts and economists are in agreement that global pre-COVID air passenger volumes will not return until the end of 2024. Similarly, air passenger forecasts for St Helena indicate the island will not see a return to pre-pandemic until the end of 2024.

This Tourism Recovery Strategy 2022-2024 offers a roadmap and key actions that can help the island return to pre-pandemic levels (2019) of visitor activity, and commensurate revenues, within 2-3 years. In 2019, St Helena welcomed c. 5,000 arrivals (excluding cruise ship visits). If the actions of the Tourism Recovery Strategy are implemented successfully, the following recovery trajectory could be expected:

- Leisure tourist arrivals would not recover significantly in calendar year 2022 due to restrictions in place, primarily quarantine on St Helena; recovery in 2023 to 70% of pre-pandemic levels; growth of 10% over 2019 figures in 2024.
- VFR or Saint-related travel: 60% of pre-pandemic travel for the balance of 2022 as frequencies increase with the resumption of scheduled flights; growth of 10% in 2023 and 20% in 2024 over pre-pandemic levels, associated with the resumption of air bridge connections via Ascension to Brize Norton and the Falkland Islands.
- Business travel effectively non-existent in 2022, with recovery to 70% and 90% of pre-pandemic levels in 2023 and 2024.

As St Helena charts a path to recovery, destination marketing efforts – strengthened by the launch of Brand St Helena – will focus on the island's core tourism attributes: nature, heritage, ocean and people. Given the recent economic downturn and

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austerity measures, alternative funding sources will need to be accessed to ensure successful marketing and product development. A path to recovery and subsequent growth will have to include unique marketing efforts, creative product innovation, a unified and driven sector, community engagement and full ministerial support.

The benefits of tourism should support and enhance the quality of life of islanders both in a tangible (financial) way and an intangible way. Enhancing the quality of life for Saints is critical and should be the ultimate goal of tourism development (becoming 'Altogether Wealthier' as per the island's National Goals); because it's the people – the Saints – that create a unique and welcoming atmosphere for visitors, which could create an exceptional visitor experience that can elevate St Helena in the global marketplace, bringing more tourism business to the island.

There is money to be made in tourism, but for tourism to succeed on St Helena both the public and private sectors must recognise and seize opportunities in tourism and hospitality, such as tour guiding, accommodation, eating places, transport services, souvenirs, food production and ancillary services. To become altogether wealthier as a result of this key revenue generator, tourism has to become everyone's business.



## 2. Why tourism?

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Tourism has been identified as the key driver for the future economic development of St Helena: But before one asks why a tourist should choose St Helena over other destinations, one should rightfully ask why tourism is seen as the key driver.

St Helena has no significant natural resources, and no volume exports, that can currently sustain or grow the island's economy.

Tourism utilises the resources, both built and natural, that are already in place on the island. It optimises the economic benefit of these existent resources, utilising them to encourage visitors to put expenditure directly into the economy. Tourism also helps expand and develop the economy. This is done through expanding the provision of tourism services as well as ensuring that tourism expenditure flows through the economy (the multiplier effect). These expansions can generate further business opportunities that might not be an obvious part of the tourism sector. This includes support services for the tourism sector, such as transport, laundry and souvenirs; but also businesses supporting the wider business sectors, such as accounting and marketing services, as well as food production and processing. All these businesses in turn create employment opportunities and generate money, providing income to government through taxes; thus supporting the wider provision of public services.

Consequently, the tourism focus is – in basic terms – about creating opportunities to separate visitors from their money. In more refined terms, it is about

maximising the amount of money that can be extracted from visitors whilst delivering a 'St Helena experience' that is satisfactory or, ideally, surpasses expectations.

Visitor feedback, reports and various comparative studies of small islands confirm there is nowhere quite like St Helena. It is clear, particularly from visitor feedback gathered since St Helena Airport opened in late 2017, that besides the history, heritage, terrestrial and marine attractions, one of the island's biggest tourism assets is its people, the Saints.

St Helena's product is, quite fortunately, surprisingly diverse, comprising a variety of elements, many natural, others either partly developed or still undeveloped. A previous study (*Tourism Development Plan, Leech, 2009*) stated that: "To have such wealth in such a small space would be the envy of much of the rest of the world – entire tourism industries in many countries are built on far less". Other reports and travel features written over the last decade support this statement.

St Helena isn't a beach-focused, 'fly-and-flop' destination. This sets St Helena apart from most other traditional, small-island tourist destinations. What the island has in abundance is a range of niche interest products, all of which have the ability to attract sustainable levels of visitors.



# 3. The impacts of COVID-19

On 12 March 2020, the World Health Organisation (WHO) raised the COVID-19 virus threat to pandemic status. Soon after, South Africa grounded its aircraft and closed its international borders, thus suspending the weekly Airlink flight from Johannesburg (JNB) to St Helena (HLE).

With the suspension of the Airlink service, St Helena Government (SHG) contracted Titan Airways on an ad hoc basis for essential travel only (medivacs, repatriation and critical staff movements) until March 2022. The Titan service flew, approximately monthly, from London Stansted to St Helena via a technical stop in Accra. The resumption of Airlink flights occurred 26 March 2022, however the flights were fortnightly until the usual weekly service resumed in October 2022, after the August lifting of all COVID-related entry restrictions.

The announcement that St Helena made and stayed on the UK's 'travel green list' saw great press and travel trade coverage, resulting in a marked increase in some months in general enquires, due to the increased awareness about the island. However, infrequent flights coupled with a lengthy quarantine period and reduced accommodation availability did little to convert interest to bookings. An 'armchair tourism' marketing campaign strived to keep the inspiration and aspiration to travel to St Helena alive until prospective visitors were ready to travel again.

During the pandemic, tourism and hospitality have been the hardest-hit sectors on St Helena. These sectors rely on the freedom of movement between the outside world and the island, with visitors arriving by air and sea. Although yachts taking extended shelter during the pandemic helped

offset some lost visitor revenues in 2020/21, from March 2020 the number of visitors arriving to St Helena plummeted rapidly, along with visitor spend. With travel restrictions and stringent quarantine protocols in place to prevent the introduction of COVID-19 into the community, visitor arrival numbers, particularly those of leisure tourists, decreased dramatically from 2020 to 2022, with almost no leisure tourists and reduced VFR, predominantly from Ascension, the Falklands and the UK.

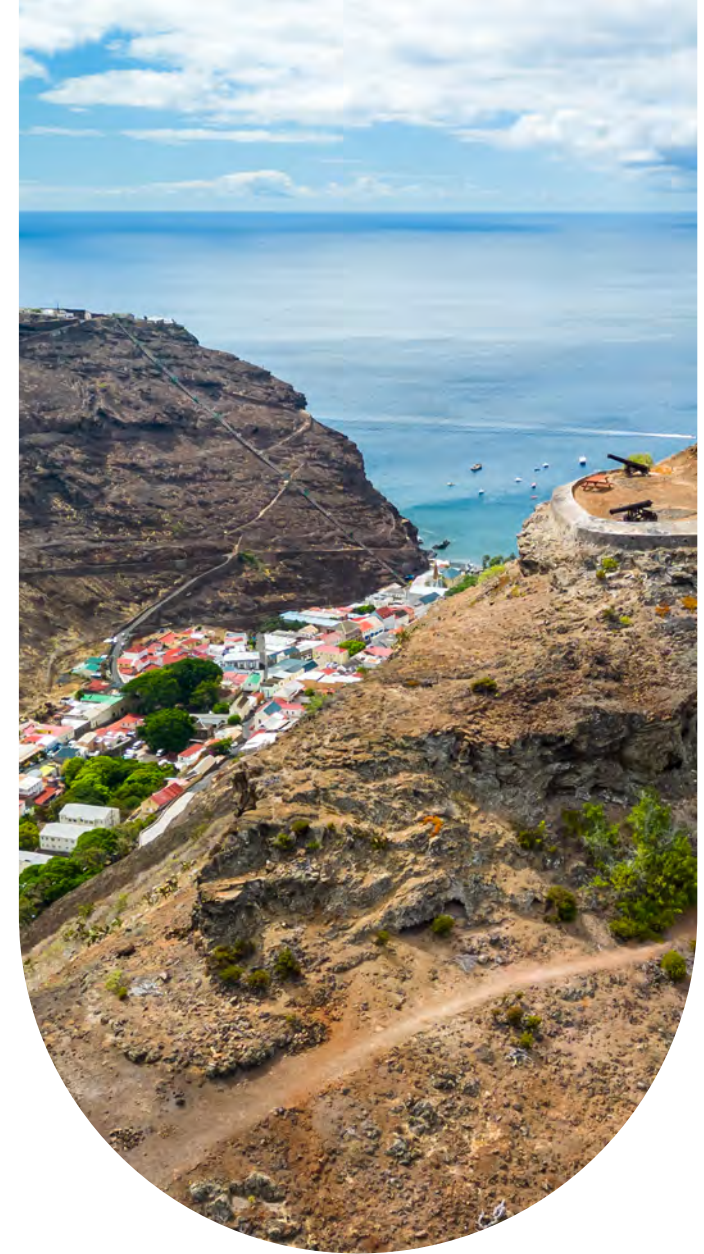
## Visitor Revenue 2018 - 2021

	VFR	Tourist	Business and SHG short-term	Yachts and other	Total £m
2018	1.94 - 2.67	1.96 - 2.66	0.54 - 0.74	0.20 - 0.30	4.64 - 6.37
2019	2.39 - 3.29	1.82 - 2.47	0.50 - 0.69	0.19 - 0.28	4.90 - 6.73
2020	1.87 - 2.57	1.06 - 1.43	0.64 - 0.88	0.24 - 0.36	3.81 - 5.24
2021	1.46 - 2.01	0.32 - 0.44	0.85 - 1.17	0.01 - 0.02	2.64 - 3.64

Table 1: SHG Statistics Office

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Within the first months of the pandemic SHG, Enterprise St Helena (ESH) and the UK Government collaboratively provided targeted business support packages to protect jobs and businesses across the tourism and hospitality sectors. Approximately £350,000 was provided to keep the industry afloat. While many businesses claim this support was critical to see them through the first year, support was limited. Those businesses that were able to diversify fared better than others. Some businesses were mothballed, folded, or were forced to change their offerings. Closures and forced hiatuses resulted in a loss of key players from the tourism sector, and this has a strong influence on what tourism will look like and what services are available as tourism recovers.



## 4. Strategic context

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This recovery strategy builds on the [tourism strategy of 2019/20](#); draws on successful elements of past tourism strategies; and takes on-board the tourism-related recommendations of Aquila Aviation's *Air Services Consultancy (2020)* report and the FCDO's [ESH \(end of Phase 2\)](#) report. This strategy contains air arrivals forecasting data by Aquila Aviation (January 2022, reviewed in July 2022 and March 2023) and data collected by the St Helena Statistics Office.

This strategy will be treated as a live document and updated as needed, with appropriate oversight and guidance, remaining flexible in case of significant external or internal changes.

All tourism functions, including marketing, sit within SHG's Sustainable Development team, which is part of the Treasury, Infrastructure & Sustainable Development (TISD) Portfolio. The objectives of this team include attracting and maintaining investment in St Helena by both local and international investors, improving the trade deficit by promoting and enabling St Helena's key export sectors and enabling import substitution, and restarting and rebuilding the visitor economy. The Sustainable Development team focuses on meeting the 'Altogether Wealthier' goal of [SHG's 10-Year Plan](#).

In terms of economic development, the [Sustainable Economic Development Plan 2018-2028](#) (SEDP) states that for St Helena to become 'altogether wealthier', it must increase exports and decrease imports to support an improved trade balance and therefore facilitate a wealthier island. Pre-pandemic, the export of services to tourists generated the largest

amount of income for the economy (excluding financial aid and remittances from abroad). It is government's role to enable the return of this income through removing barriers to economic activity.

This strategy aligns with the TISD Portfolio Priority 1 ('Secure and protect key revenue streams and maximise revenue generating opportunities'); specifically, Action 1.3 under Priority 1 ('Ensure successful recovery from the impacts of the COVID-19 pandemic').



## 5. Primary objective

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Analysts and economists are in agreement that global pre-COVID air passenger volumes will not return until the end of 2024. Air passenger forecasts for St Helena indicate the island will not see a return to pre-pandemic visitor levels until the end of 2024. Thus the primary objective of this strategy is:

***To see a return to the arrivals numbers experienced in 2019 (c. 5,000, excluding cruise ship visits) by the end of 2024, with appropriate tourism and hospitality services in place to meet the needs of visitors.***

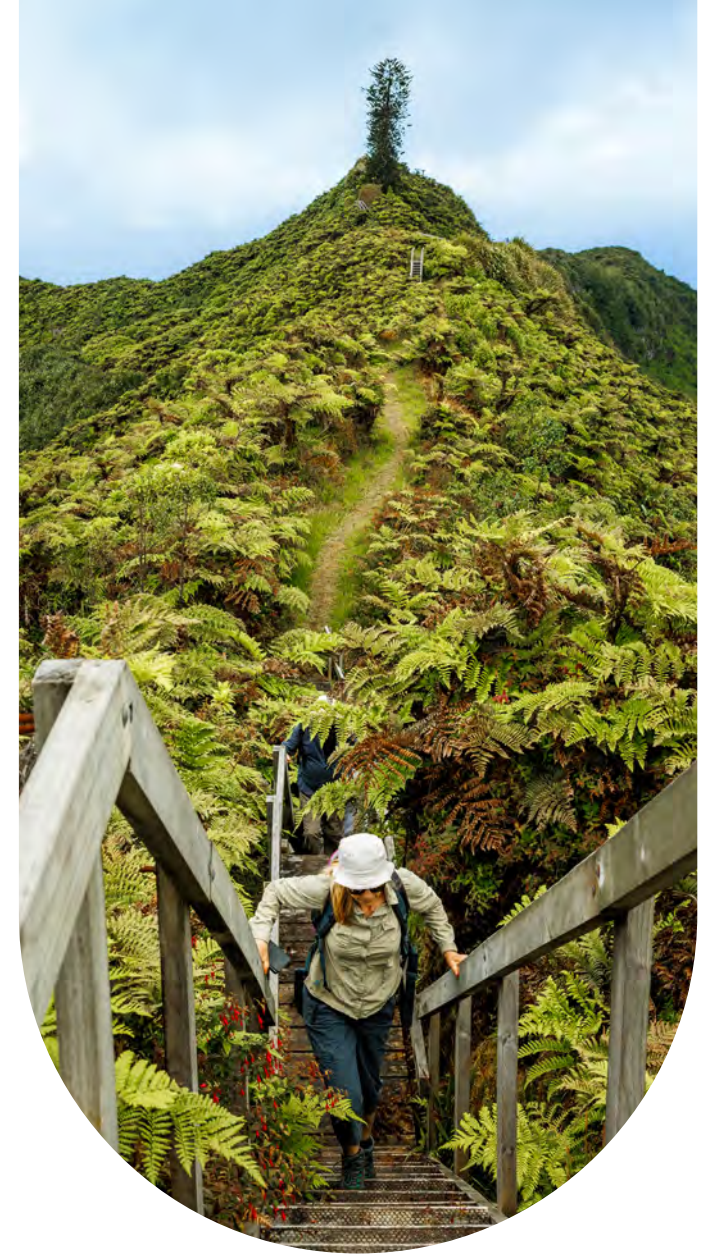


# 6. Sub-objectives

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Nine sub-objectives support the primary objective of this tourism strategy. They are:

1. Improve the St Helena visitor experience and increase average spend
2. Develop and diversify the tourism product
3. Strengthen and expand tourism services
4. Increase accommodation capacity
5. Increase destination awareness through targeted marketing campaigns
6. Re-engage and develop key markets by increasing the number of tour operators selling St Helena
7. Develop the skills of those that work in the tourism and hospitality sectors in order to improve the St Helena experience and increase customer satisfaction
8. Establish a St Helena Tourist Board to represent the sector and provide oversight to Visitor Information Services and tourism functions
9. Develop St Helena Tourism as an attractive model for divestment to the private sector once the tourism and hospitality sectors have recovered and show growth.





## 7. Delivery

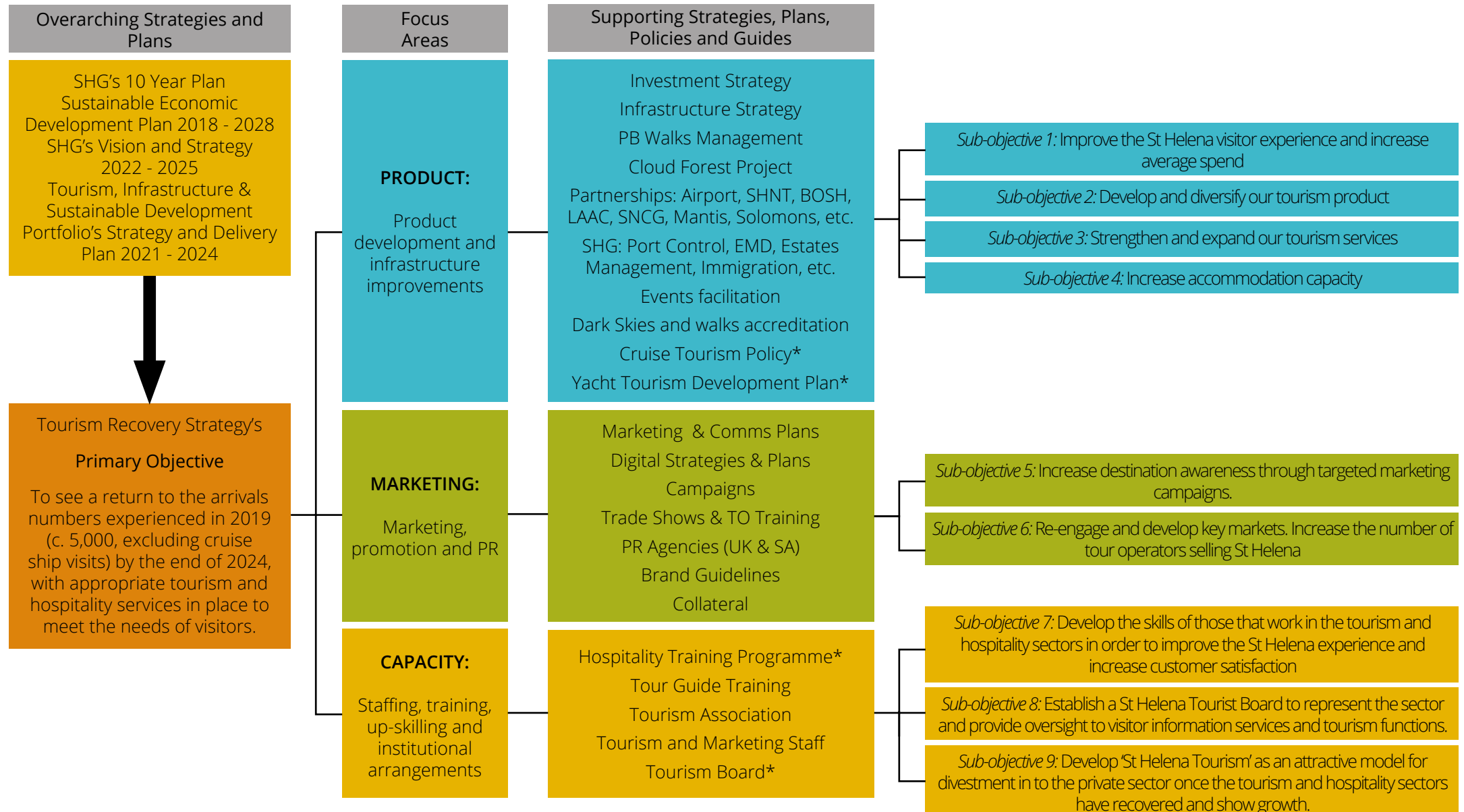
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These objectives will be delivered through three main areas of focus:

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

The delivery of these three main areas of focus are principally the responsibility of St Helena Tourism and SHG's Marketing function. All functions are overseen by the section leader, the Head of Sustainable Development.

# 8. Overarching and supporting strategies, plans, policies and partnerships



\*To be developed

# 9. Tracking and targets

		Measurable	Targets by end of 2024
<p><i>Sub-objective 1: Improve the St Helena visitor experience and increase average spend</i></p> <p><i>Sub-objective 2: Develop and diversify our tourism product</i></p> <p><i>Sub-objective 3: Strengthen and expand our tourism services</i></p> <p><i>Sub-objective 4: Increase accommodation capacity</i></p>	<p><b>PRODUCT:</b></p> <p>Product development and infrastructure improvements</p>	<p>Visitor survey</p> <p>Income and expenditure details recorded and compared on a year-to-date basis</p> <p>Balance of Payments</p> <p>No of bed nights</p> <p>Business directory updates (no of rooms, services, tour guides, taxis, eating places, DMCS, etc.)</p> <p>Business survey</p>	<p>Arrivals numbers across all visitor categories exceeds those of 2019 baseline</p> <p>Expenditure across visitor categories exceeds those of 2019 baseline</p> <p>Daily average expenditure across visitor categories shows an increase on 2019</p> <p>Increased visitor nights on 2019 baseline</p> <p>No of available rooms across accommodation categories (hotel, B&amp;B, guest house, self catering) equals that of 2019 baseline</p>
<p><i>Sub-objective 5: Increase destination awareness through targeted marketing campaigns.</i></p> <p><i>Sub-objective 6: Re-engage and develop key markets. Increase the number of tour operators selling St Helena</i></p>	<p><b>MARKETING:</b></p> <p>Marketing, promotion and PR</p>	<p>Conversion rates</p> <p>PR companies' reports, positive news stories</p> <p>KPIs on marketing plans</p> <p>Website and social media metrics</p> <p>Campaigns VFM</p> <p>Successful events</p> <p>Partners engaged, projects completed</p> <p>No of films, articles, companies registered, voluntourists, investors in tourism businesses, digital nomads, etc.</p> <p>Comprehensive up-to-date information available across all platforms</p>	<p>Business survey 2024 reflects improved performance in private sector (notably tourism and hospitality businesses)</p> <p>VIS opens 7 days a week</p> <p>VIS satisfaction scores above 70%</p> <p>Telephone and email enquiries followed up within 24 hours</p> <p>5% of all visitors surveyed (excl. cruise pax)</p>
<p><i>Sub-objective 7: Develop the skills of those that work in the tourism and hospitality sectors in order to improve the St Helena experience and increase customer satisfaction</i></p> <p><i>Sub-objective 8: Establish a St Helena Tourist Board to represent the sector and provide oversight to visitor information services and tourism functions</i></p> <p><i>Sub-objective 9: Develop 'St Helena Tourism' as an attractive model for divestment in to the private sector once the tourism and hospitality sectors have recovered and show growth.</i></p>	<p><b>CAPACITY:</b></p> <p>Staffing, training, up-skilling and institutional arrangements</p>	<p>Customer satisfaction scores</p> <p>VIS mystery shopper scores</p> <p>Enquires answered and followed up</p> <p>VIS walk in stats</p> <p>VIS scores through visitor survey</p> <p>Staff progress through PMP</p> <p>Hospitality training programme adopted</p> <p>No of persons trained or accredited</p> <p>Ministerial approval for Tourist Board</p>	<p>Rolling average of 60%+ net promoter score (likelihood of recommending others to visit St Helena)</p> <p>Hospitality training programme yields positive results</p> <p>No of businesses across tourism sector exceeds those recorded in 2019</p> <p>20 people accredited as tour guides</p> <p>Tourism staff meet PMP objectives</p> <p>Tourist Board is established and functioning optimally</p>

# 10. Rationale for strategy development

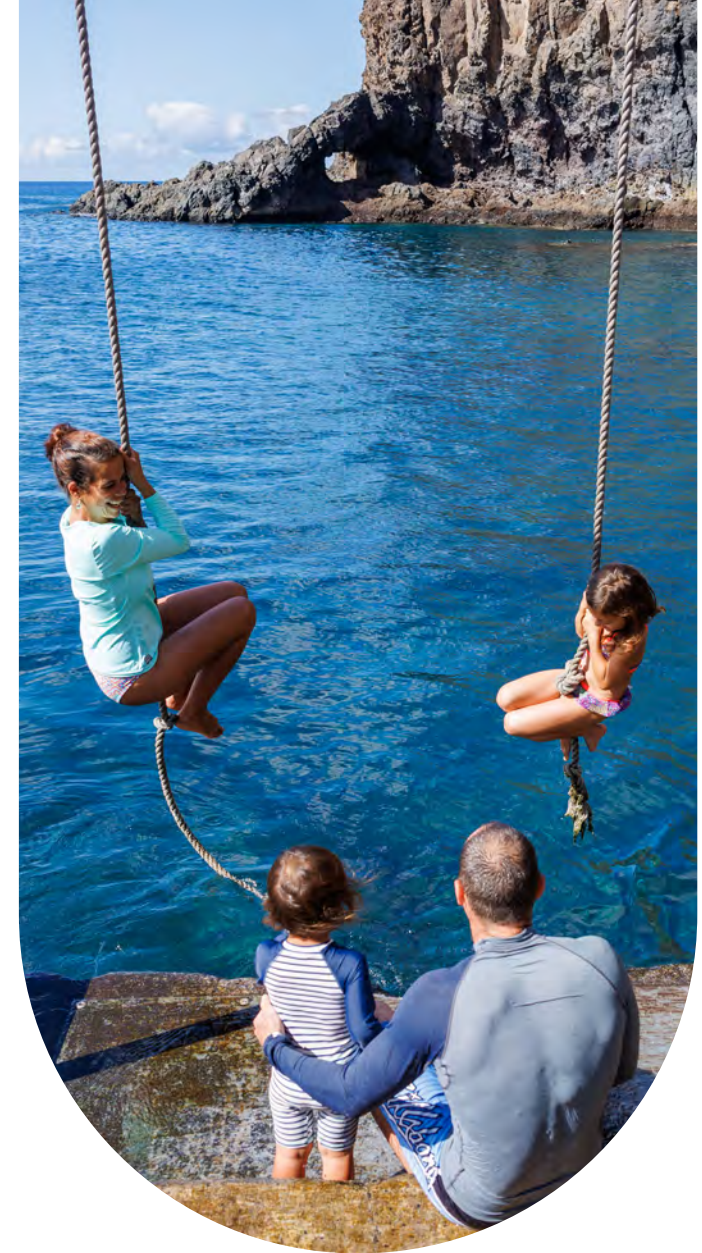
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Over the next few pages the main weaknesses and threats listed identify those areas that need to be improved to ensure tourism recovers and flourishes. The strengths and opportunities highlighted are areas to leverage and further develop. The identified weaknesses, threats, strengths and opportunities that factor into St Helena's tourism recovery have helped define the objectives of this strategy.



# 10.1 Strengths

- St Helena is an old island, but is one of the world's newest travel destinations. Up until October 2017, the island could only be reached by sea. Today, what was a 5-day ship journey is a 6-hour flight. Bragging rights and bucket-list appeal attract intrepid travellers.
- 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. 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.
- Saints are known for their warm welcome, tranquil lifestyle and unique heritage. With fewer than 4,500 residents, everyone knows everyone in this tight-knit community and visitors quickly fall in love with the melting-pot, welcoming culture and cuisine.
- The island is an adventurer's paradise, offering a network of 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. Globally significant terrestrial and marine conservation projects are ongoing, protecting and enhancing St Helena's globally important environment, both land and sea.
- The island's 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 sport fishing, and the waters warm with high-visibility.
- The island's location makes it an attractive and often necessary stopover for yachts and other vessels.
- The island has more than 500 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 transatlantic slave trade, and famous visitors like Darwin and Halley have also left unique imprints on the island. The island's archives and museum allow visitors to immerse themselves in the unique history and heritage of this mid-Atlantic stopover.
- The island's golf course and distillery carry the 'world's most remote' moniker; St Helena Coffee is one of the world's most-prized; St Helena honey is pure and the tuna is world-class. Jonathan the Tortoise as of January 2023 held two Guinness World Records, the world's oldest living land animal (his 190th was celebrated in 2022) and the oldest chelonian to have ever lived.



# 10.2 Weaknesses

- In the global marketplace the island has had no clear brand, instead being known mostly – if at all – for Napoleon, Jonathan and/or whale sharks. Remnants of negative ‘wind shear’ publicity are still present amongst some travel trade.
- The island’s remoteness, travel time, flight arrangements (for needing to overnight in Johannesburg, limited flight frequency and fixed ticket costs) all limit potential markets.
- Lack of a sheltered landing quay, and otherwise minimal cruise-tourism infrastructure, is unattractive to cruise lines.
- The island offers a limited range of quality tourist accommodation. Capacity is severely constrained, with no significant increase in the number of serviced rooms since the airport and the Mantis hotel opened. Investor interest in hospitality and tourism businesses has been low.
- Restaurants, eateries and entertainment venues are limited.
- The supply and range of fresh, local produce is limited.
- The quality of tourism and hospitality services is below the expected international standard. Price structures are often unclear, and as the island has only seen two years of ‘increased tourism activity’ (after the airport opened and before the pandemic halted travel), the local accommodation, tour and activity providers are still testing the price elasticity of products and services.
- A shortage of skilled staff exists across the hospitality and tourism sectors. No structured hospitality training is available outside the secondary school curriculum.
- Only a handful of local DMCs, quality tour guides and ground handlers are available to assist international tour operators.
- Few tour operators are actively selling St Helena.
- The St Helena Tourism Association has remained largely inactive, even before the pandemic, and no St Helena Tourist Board exists for oversight and guidance (the ESH Board which provided this function ceased 31 March 2021).
- Due to various historic factors, local confidence in the opportunities and benefits of the tourism sector has been low.



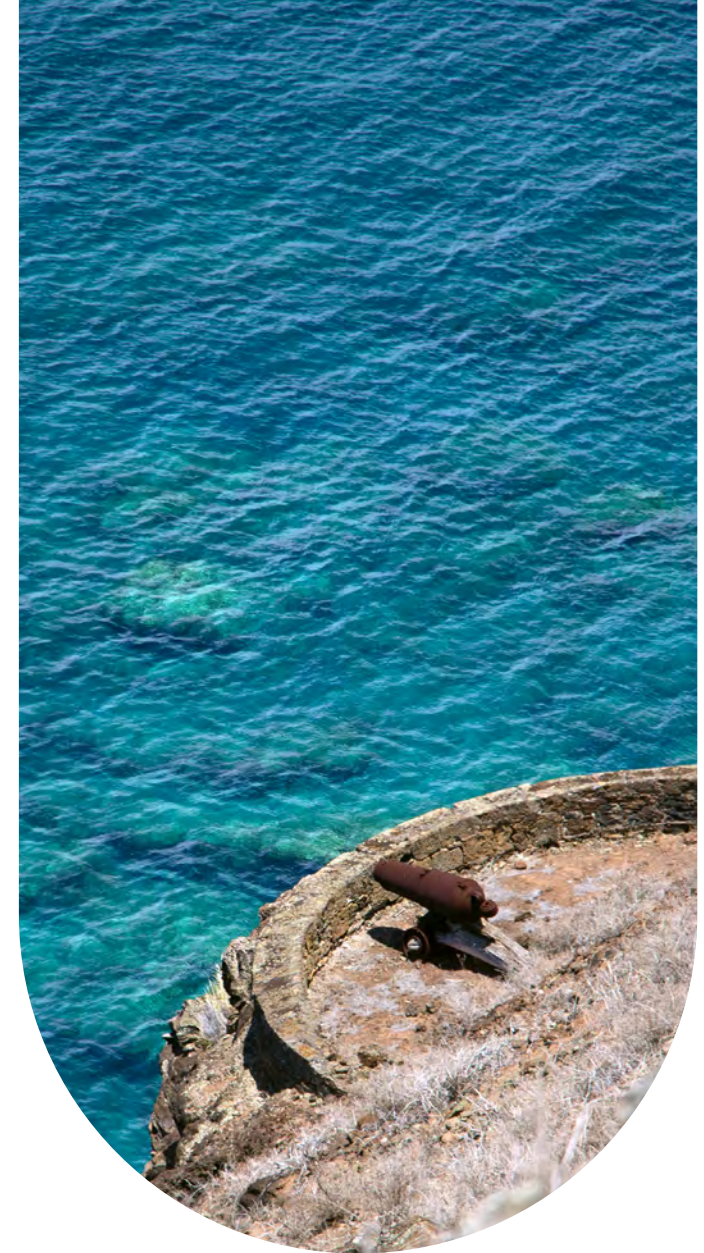


## 10.3 Opportunities

- St Helena is 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 is solid.
- 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. Natural assets can be capitalised upon, and require little development funding in the short to medium term.
- New commercial air routes are coming into South Africa, notably from the USA, and St Helena has opportunity to capitalise on these new routes and markets.
- The pandemic has allowed time to reflect on lessons learnt from the first years of air access-based tourism. For instance, based on the identified need for its establishment, SHG is establishing St Helena's first true brand, based on dedicated, locally conducted stakeholder research and evaluation, and this brand will drive St Helena Tourism's marketing efforts and identity during recovery.
- Improved telecommunications and connectivity should be imminent, with the nearing activation of the Equiano fibre optic internet cable (to replace the satellite connectivity currently charged per megabyte). This should encourage intelligent and creative use of the internet and social media that could help the island compete in the global marketplace.
- There is much scope to expand the island's soft adventure offering, with little required in terms of infrastructure development; and to attract hard adventure and sports enthusiasts for marathons, ocean swimming, triathlons, abseiling, rock climbing and the Jacob's Ladder challenge. While hiking is year-round, dive season could be extended from January-March to November-June.
- St Helena could appeal to niche markets such as dark tourism (the slave 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.
- Private sector individuals and businesses could capitalise on the opportunities available within the sector and generate additional income.

# 10.4 Threats

- The world has been reopening but the impacts of the pandemic will continue to linger. Tourism's recovery, globally and locally, will likely also be slowed by the war in Ukraine, inflation and price hikes (notably fuel and food), and new COVID variants or new pandemics that could prompt further travel restrictions.
- If tourism is slow to recover, low visitor numbers will struggle to sustain the island's tourism and hospitality sectors. Businesses may fail to reopen.
- A lack of budget to promote the island, support product development and ensure the capacity to deliver tourism functions, along with blanket austerity measures throughout SHG, greatly jeopardises tourism's recovery.
- Due to the complexities of St Helena's air access requirements, the island has very limited options when it comes to flights to/from the island.
- Insufficient investor interest to develop the tourism and hospitality sectors, combined with a lack of or inadequate training opportunities, could perpetuate an island-wide hospitality skills shortage and subpar customer service standards.
- Accelerated emigration of the island's working-age population for employment opportunities overseas could widen skills gaps and worsen the 'brain drain'. The island's working-age population could fall below the levels required to adequately provide staff and services in the public and private sectors.
- The island's higher-capacity accommodations (pre-pandemic these were Mantis and the Consulate Hotel) are critical to engaging tour operators to spearhead tourism's recovery. If there is no significant increase in the number of quality serviced rooms and suitable accommodation – if there remains an inability to match airline seats with available beds – tourism's recovery and growth will be constrained. Aging accommodation owners with no succession plan exacerbate the fragility of the sector's future.
- A lack of availability of local produce (fruit, vegetables, fish, meat, secondary products) along with low-quality and limited menu offerings could impact the attractiveness and marketability of the island.
- While the island has a variety of products with cross-sectional appeal, a failure to maintain and develop key attractions could diminish the island's uniqueness and appeal, making it easier to be out-competed by other destinations.



# 11. Barriers and risks

St Helena is like many other small islands that share similar characteristics and challenges, including the distance from large economies, diseconomies of scale, skewed market competition, a small population (thus capacity issues), net out-migration (particularly of skilled and qualified people in the economically active demographic), and limited diversity of resources (leading to economic vulnerability). Plus, as St Helena is the one of the remotest islands on the planet, these challenges are amplified; for instance by the complexities of operating a commercial air service in the South Atlantic Ocean.

Still, tourism remains the island's key revenue generator. In 2018 and 2019, visitor expenditure was between £5-6m, or approximately 12% of total income. With the commencement of commercial flights from October 2017 there was an increase in the number of arrivals and departures each month, with peak travel occurring between December and April each year. The potential of tourism as an economic, social and cultural asset was slowly becoming apparent. A significant proportion of the island's workforce was engaged directly or indirectly in the provision of tourism services, contributing to the visitor economy.

St Helena now needs to get back to that level of pre-pandemic tourism activity. But weekly flights coupled with a shortage of quality accommodation has negatively impacted the propensity of tour operators to sell St Helena since the airport became operational. A much-weakened accommodation and

hospitality sector, coupled with a lack of hospitality training opportunities and a shrinking working-age population, is set to make recruitment and retention in the hospitality and tourism sectors very challenging. Poor customer service, leading to poor reviews from disappointed visitors, could negatively impact the destination's marketability.

The scope for short- to medium-term tourism growth is limited. Flying to St Helena has operational constraints. A rigid 7-day stay, weekend arrival/departure, one air service provider (no market competition through fare reduction or booking incentives) and a distinct peak season all impact tourism-related income and therefore the economy as a whole.

The availability of serviced accommodation could be a major barrier to tourism recovery, with no significant increase in the number of serviced rooms (hotels and guest houses) since commercial flights started and the Mantis St Helena hotel opened. Availability is inconsistent and offered subjectively. The lack of serviced rooms and varied price points is off-putting to tour operators.



# 12. How do we recover?

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The key challenge in recovering and developing St Helena's tourism products, services and markets will be to create a sustainable identity that protects and enhances the island's natural and human assets. Visitor feedback, reports (both commissioned and those offered freely) and various comparative studies of small islands confirm there is nowhere quite like St Helena. Development models that have brought success to other islands are not scalable (downwards) or are simply non-transferrable given the island's unique characteristics. It is clear, particularly from visitor feedback gathered since the airport opened, that besides the history, heritage, terrestrial and marine attractions, one of the island's biggest tourism assets is its people, the Saints. A complex and all-encompassing paradigm of challenges is involved in attracting sufficient investment and developing quality accommodation, whilst simultaneously preparing the island for an increase in visitors and protecting the island's fragile environmental, social and cultural assets.

For St Helena to grow as a destination it will be crucial that the island stands out in the global marketplace as a unique, culturally and historically important destination with superb natural attributes: a must-see, bucket-list destination for the traveller that seeks genuine and authentic experiences.

During peak season 2019/20, around 11 tour operators brought approximately 75% of leisure tourist arrivals to St Helena. Of these 11, four dive tour operators brought groups that contributed

approximately half of the tourist revenue during this period. Divers tend to have a higher daily spend than the average tourist. Speedy tourism recovery and subsequent growth hinges on keeping those tour operators that have successfully sold St Helena, engaged and interested in selling St Helena. New tour operators require time to market the destination and then send clients to the island. Average lead time for tour operators, pre-pandemic, was between 12 and 18 months.

An increase in visitor numbers – particularly Leisure Tourist arrivals delivered through tour operators – requires a trifecta of:

- Regular flights, with an available booking schedule of at least two years
- Assured availability of quality accommodation, with commissionable room rates
- Easy booking of quality, value-for-money services (tours, activities, eating places, transport) with assurances of availability with lead times of more than a year.

In summary: how to get to St Helena, where to stay, and what to do, must align.

While the worldwide pandemic has called for a global tourism rethink and reset, the objectives of the *St Helena Tourism Strategy 2019/20* are still very relevant, with focus on the island's core tourism attributes of nature, heritage, ocean and people. A successful path to recovery and growth would include unique marketing efforts, creative product

innovation, a unified and driven sector, community engagement and full ministerial support. Alternative funding sources would need to be accessed to ensure successful marketing and product development.

The benefits of tourism should support and enhance the quality of life of islanders in both a tangible (financial) and an intangible way. Enhancing the quality of life for Saints is critical, and is an ultimate goal of development ('Altogether Wealthier').

It's St Helena's people that create a unique atmosphere for visitors that can bring about a transformative and memorable visitor experience. Community participation in tourism development, whilst preserving and developing local identity and culture, is also essential for the creation of a sustainable tourism destination. Community involvement ranges from participation in the decision-making processes (e.g. Tourism Association, Tourist Board) to economic involvement (private sector) and the individual promotion of the destination (having pride in and celebrating St Helena). Through involvement in tourism activities, Saints can maximise the socioeconomic benefits that tourism can bring. Tourism on St Helena has to be everyone's business. The wider community must see the benefits of tourism to the economy, and embrace tourism as a necessary part of daily life.

Positively and paradoxically, the very attributes that constrain the development of a tourism-driven



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economy – the island’s remoteness, lack of large-scale development, challenges with access and connectivity – could be the island’s greatest tourism assets. Feedback from tourism professionals at the We Are Africa travel trade show (Cape Town, May 2022), Experience Africa (London, June 2022) and WTM London (November 2022) confirmed this: tour operators interested in selling St Helena are looking for ‘something brand new’, ‘unknown places with a story’, ‘the next undiscovered destination’ and ‘something very different, off the beaten track’.

“A breath of fresh air” is the summation/strapline that will drive the development and proliferation of tourism branding.

# 13. Historical travel analysis

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SHG's Statistics Office collects and collates arrivals statistics and undertakes forecasting<sup>1</sup>: The five main categories of visitors to St Helena are Leisure Tourists; Visiting Friends & Relatives (VFR); Yachts; Business; and Transit.

How well tourism performs can largely be measured by tracking overnight Leisure Tourists' numbers, length of stay, and spend.

'Leisure Tourists' travel to St Helena for leisure, through a tour operator or independently. Pre-pandemic demand was mainly for November to April (peaking February-March), aligning with the best weather and the whale shark phenomenon. Duration of stay, pre-pandemic, was typically a week (matching the weekly flight schedule). Leisure Tourists pay to stay in hotels, guest houses, B&Bs and self-catering properties, as well as to undertake tours and activities. They tend to pay for airport transfers and use taxis or other chargeable transport such as guided tours or (for a small proportion) hire cars. They tend to have a meal plan as part of their package, and thus tend to eat at the hotel or guest house, utilising other restaurants or enjoying organised dining events as part of their itineraries.

Those arrivals that primarily travel for the purpose of Visiting Friends & Relatives (VFR) are also tourists, in a sense, as their primary motivation for travel to the island is usually leisure, and they utilise many tourism services. However, the need to see people they know, or to visit 'home', drives the desire to visit and thus VFR arrivals tend to have an increased

length of stay (3 to 6 weeks). The majority of the VFR category are Saints that reside overseas. They tend to stay in self-catering accommodation, a family residence, or with family/friends. This accommodation arrangement often has a low- or no-cost element. Some pay tourist rates to stay in self-catering accommodation. They tend to hire a car, or utilise a family-owned vehicle. They will undertake activities such as hikes, boat trips and visiting places of interest, but generally will pay less for the services (as a guide is not always required, or there's a reduced rate offered). VFR arrivals will eat out, booking restaurants for large family gatherings or celebratory events. Demand is highly seasonal, concentrated around the festive season. Additional shuttle trips between St Helena and Ascension in December and January assist to meet the demand to reunite families around Christmas. Total average daily spend varies widely, but is significantly below that of Leisure Tourists as accommodation costs are much reduced.

Business arrivals include short-term contract workers employed by SHG; specialist work teams such as rock netting specialists or scientists involved with collaborative environmental projects; and researchers. This group has potential to contribute significantly to the visitor economy.

Transits are those travelling onto another destination. Typically, transits come through St Helena to or from Ascension Island, but this group also includes those transferring to or from marine vessels (e.g. as a crew changes over). The latter

might spend a short period on the island and utilise tourism and hospitality services.

<sup>1</sup>

The forecasting process is based on the following:

- 2019 data as the baseline year
- Traffic recovery paths are based on different capture rates and growth, depending on individual segments
- Sensitivity factors for 'low' and 'high' cases result from the baseline forecasts that adjust the composite capture/growth estimates
- Air bridge flights from Ascension Island to Brize Norton resume from 2023, but have limited impact on HLE arrival data

# 13.1 Visitor segmentation

The table below shows air arrivals at HLE for 2018 and 2019, including segmentation analysis, and shows growth in 2019 compared to 2018 figures.

Actual arrivals	2018	2019	Growth
<i>Total air arrivals</i>	3816	4261	1.12
Tourism	2051	2446	1.19
Business	884	810	0.92
Returning resident	780	977	1.25
Transit	101	28	0.28
<i>Tourist visitors</i>			
British	358	471	1.32
St Helenian	1062	1226	1.15
South African	235	246	1.05
European	254	259	1.02
Asia-Pacific	39	84	2.15
Americas	85	112	1.32
Other	18	48	2.67
<i>Business visitors</i>			
UK, St Helena	436	470	1.08
south African	261	145	0.56
Other nationality	187	195	1.04

Table 2: SHG Statistics Office

## 13.2 Visitor revenue

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The table below shows revenue for visitor revenue categories in 2018 and 2019 (pre-pandemic).

	VFR	Tourist	Business and SHG short-term	Yachts and other	Total £m
<b>2018</b>	1.94 - 2.67	1.96 - 2.66	0.54 - 0.74	0.20 - 0.30	4.64 - 6.37
<b>2019</b>	2.39 - 3.29	1.82 - 2.47	0.50 - 0.69	0.19 - 0.28	4.90 - 6.73

*Table 3: SHG Statistics Office*

# 13.3 Daily expenditure

The table below shows average daily spend across visitor categories:

Purpose of trip (category of visitor)	Daily expenditure
VFR	£80 - £110
Leisure tourists	£140 - £190
Short-term business visitors (including government)	£80 - £110
Arrivals by yacht or for transit	£50 - £75
Day visitors from cruise ships	£30 - £50*

Table 4: SHG Statistics Office

\*Includes landing fee

# 14. Forecasted air arrivals

The table below extrapolates air arrivals through 2024:

	2022	2023	2024
Total air arrivals	1256	4063	4889
Leisure tourists	87	854	1342
VFR	1157	2971	3241
Other business	12	238	306

Table 5: Aquila Aviation

# 14.1 Forecasted visitor revenue

The table below estimates visitor revenue through 2024:

	VFR	Leisure tourist	Business and SHG short-term	Yachts and other	Total (£m)
<b>2018</b>	1.91 - 2.62	1.85 - 2.51	0.54 - 0.74	0.25 - 0.38	4.55 - 6.27
<b>2019</b>	2.24 - 3.07	1.77 - 2.40	0.50 - 0.69	0.28 - 0.43	4.78 - 6.59
<b>2020</b>	1.93 - 2.66	0.92 - 1.25	0.47 - 0.65	0.26 - 0.40	3.59 - 4.96
<b>2021</b>	1.72 - 2.37	0.22 - 0.30	0.51 - 0.70	0.05 - 0.08	2.50 - 3.45
<b>2022</b>	2.32 - 3.19	0.75 - 1.01	0.60 - 0.83	0.19 - 0.28	3.86 - 5.31
<b>2023</b>	2.22 - 3.05	1.32 - 1.78	0.40 - 0.55	0.28 - 0.43	4.21 - 5.81
<b>2024</b>	2.42 - 3.33	2.07 - 2.80	0.51 - 0.71	0.28 - 0.43	5.28 - 7.27

*Table 6: Sustainable Development*

\*Estimated leisure tourist revenue for 2023 and 2024 is calculated at an estimated £165 per day. For 2022, an estimate of £95 per day is used.

# 14.2 Visitor growth rates

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In summary, the forecasted visitor growth in Table 5 depicts:

- Leisure Tourist arrivals not significantly recovered in 2022 (due to COVID-related entry restrictions, primarily quarantine); recovery in 2023 to 70% of pre-pandemic levels; growth of 10% over 2019 figures in 2024
- VFR equalling 60% of pre-pandemic travel for late 2022, as travel options increase with the resumption of weekly flights; growth of 10% in 2023; growth of 20% in 2024 over pre-pandemic levels, associated with the resumption of air bridge connections via Ascension to Brize Norton and the Falkland Islands
- Business travel effectively non-existent in 2022, with recovery to 70% and 90% of pre-pandemic levels in 2023 and 2024.



# 14.3 Air access, medium- and long-term prospects

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St Helena is fortunate that it has a willing and viable air access partner that is well-placed to benefit from the withdrawal of South African Airways, SAA Express, Comair and Kulula on multiple routes. 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.

Going forward, value for money is key.

Airlink operates an aircraft (Embraer 190) that is fully optimized for St Helena: small enough to land and the 'right size' (available seats) to align with the market size. The E190 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).

The number of airlines with the right aircraft available and willing to operate to St Helena is severely restricted, a situation that is unlikely to improve any time soon, and has potential to become worse (airline bankruptcies, fleet retirements etc.). The current air service agreement with Airlink expires in October 2024; without a confirmed flight schedule and public booking options available 12 to 18 months in advance, St Helena could struggle to maintain visitor numbers and especially to maintain or increase tour operator bookings. SHG's Civil Aviation team is looking to secure a longer-term agreement for the next air

service contract, which would help ensure bookings are consistently available further into the future, meeting tour operator lead times and allowing marketing of the island to be effectively met with the ability to book trips.





## 14.4 Cruise ship arrivals

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Around 10 cruise ships expressed a desire to call at St Helena between January 2022 and January 2024. These visits could see some 7,000+ passengers and 2,900+ crew visit St Helena. However, the number of passengers disembarking each vessel is of great concern as St Helena has severe infrastructure limitations that could limit the amount of money actually able to be extracted from these visits, for instance limited roadways and limited ability to accept varied currencies. The island's infrastructure and services easily become swamped by the influx of cruise tourists; a stakeholder group has been formed to evaluate and collectively plan for cruise ship tourism.

Lead times to book routes for most cruise lines is 18 months to 3 years. Uncertainty surrounding what facilities and services are available on St Helena (for instance cruise ships cannot berth alongside as they would in most ports but must anchor in the bay and utilise tenders) could exclude the island from route-planning decisions.

# 14.5 Yacht arrivals

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Pre-pandemic, around £250,000 a year could be attributed to expenditure by yacht arrivals in yachting season (November to April). While limited COVID-testing timeslots in 2021 and early 2022 caused some yachts to bypass the island or leave after a short period, arrivals by sea still kept the island's visitor numbers and revenue ticking over during this period. However, the lack of adequate facilities available to yachties on the wharf could detract from annual yacht races calling at St Helena, and impinge on the perception of the island within this important visitor demographic more generally.



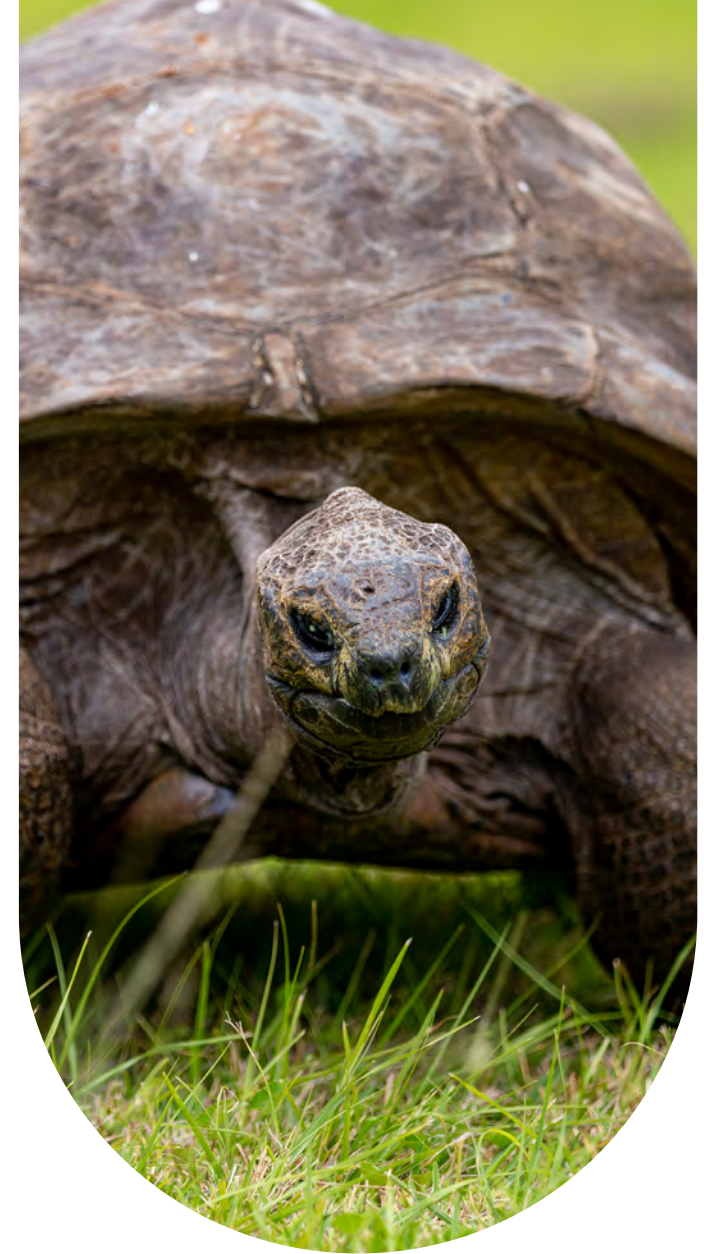
15. Where could tourism be?



# 15.1 What was achieved in 2021-2022

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In its first year the newly formed Sustainable Development team was still establishing itself, with some posts filled during the year. An armchair tourism campaign was delivered to sustain awareness of St Helena as a destination at the height of the pandemic. Key achievements included website updates, implementation of a social media strategy/plan, and the establishment and operation of Visitor Information Services through the Tourist Office. Product development elements included Post Box Walks maintenance, support for the the St Helena Cloud Forest Project, Napoleonic properties and the Liberated African Advisory Committee, work towards dark skies accreditation and planning for the Cape to St Helena yacht race. Considerable effort was directed into plans to reopen the island and associated communications. Product training for tour operators was delivered through online platforms and St Helena Tourism was represented at three international travel trade shows to build interest for 2023 and beyond.



# 15.2 Where could tourism be in Year 1?

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## Year 1 (by October 2023):

- By March 2023 arrivals numbers across all categories are forecasted to increase, with a year of Airlink flights recorded post-pandemic (but with just under 6 months of weekly flights)
- Good VFR numbers, particularly over the Christmas period. This revenue would help offset losses from a lack of Leisure Tourists and encourage the sector to ramp up activity, particularly food and beverage services, in preparation for increased arrivals
- Good volumes and revenues from divers that postponed bookings, but low to medium new bookings from other tour operators (compared to 2019/20 figures), such as historical and walking tours, due to the reduced lead times from the reopening of the island (August 2022)
- Businesses that survived the pandemic to have reopened, with some new businesses operating. However the accommodation sector is expected to lag, with around 50-60 serviced rooms available across the island
- An air access tender should be underway
- Plans in place to take advantage of the activation of the fibre optic cable, pending confirmation of the service provider and prices.

## Product

- St Helena Tourism will work with the tourism sector to increase per capita spend by creating more opportunities for visitors to pay for services
- St Helena Tourism will work with local suppliers to improve culinary experiences, encouraging eating places to diversify their menu offerings, using more locally sourced ingredients
- St Helena Tourism will work with stakeholders, notably Solomon & Co., to develop a Cruise Tourism Policy
- St Helena Tourism will increasingly utilise digital technology and social media, providing visitors opportunities to project St Helena in a positive way that assists our marketing efforts, such as the use of QR codes
- St Helena Tourism will work with the tourism sector to encourage more immersive and participatory experiences and more linked and grouped activities
- St Helena Tourism will work with other portfolios and across the sector to ensure standards of cleanliness for the upkeep of amenities, attractions and surrounds is set at a high level, and maintained
- St Helena Tourism will work with the sector, notably the Bank of St Helena (BOSH), to reduce barriers to spending, namely: an inability to use international cards; increase access to cash and banking services; improve booking and

cancellation policies. We will work with BOSH to promote use of the Tourist Card

- St Helena Tourism will have a range of sample itineraries available
- St Helena Tourism will continue to develop our main product categories and key attractions, noting health and safety is paramount
- St Helena Tourism will explore new low cost development opportunities that could help diversify our offering
- St Helena Tourism will support, strengthen and expand our tourism services, in particular increasing the number and/or improving the services of DMCs, tour guides, transport providers and eating places
- St Helena Tourism will work with the accommodation sector to ensure business continuity, encouraging use of commissionable (STO) rates and revenue management tactics, and to sign up with online booking platforms. We will facilitate the booking of accommodation for the sector, as needed
- St Helena Tourism will continue to advise the wider TISD portfolio of the need for infrastructure improvements to support tourism development
- EDIP micro project funded works will improve the safety and infrastructure of the Post Box Walks.

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## Marketing

- Delivering a strong marketing mix (paid, owned, shared, earned) of value-for-money content across a variety of mediums, platforms and outlets, promoting St Helena's most relevant and newsworthy sectors, partnerships, activities and achievements
  - St Helena Tourism's Brand Strategy, Brand Plan, Visual Brand Identity Guidelines completed and implemented
  - Overhauling the tourism website, collateral, digital and trade training platforms to match the new branding
  - Reviewing, implementing or updating, all marketing-related plans and strategies
  - Delivering online training to tour operators through proven platforms
  - Attending trade shows in the main source markets of the UK and SA, and exploring new markets
  - Facilitating successful media and FAM trips.
- guides successfully accredited
  - Working with the Tourism Association to ensure it is operational, and that service providers within the sector have a voice
  - Ministerial approval sought for the formation of a St Helena Tourist Board.

## Capacity

- Increased number of staff tasked with delivering tourism and marketing functions within SHG
- Working with stakeholders to ensure hospitality training is being delivered across the sector
- Have rolled out a tour guide training and accreditation programme, with at least 10 tour



# 15.3 Where could tourism be in Year 2?

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## Year 2 (by October 2024)

- By October 2024, successful tourism recovery should show arrivals numbers and expenditure, across all visitor categories, exceeding those of the 2019 baseline
- Recovery across the accommodation sector should show an increase in the number of room nights from 2019, and the number of available rooms across accommodation categories (hotel, B&B, guest house and self-catering)
- The annual business survey conducted in 2024 should reflect improved performance for private-sector tourism and hospitality businesses, compared to the 2022 and 2023 surveys. The number of businesses across the tourism sector should equal or surpass those recorded in the business directory in 2019.

## Product

- Continuing to develop main product categories and key attractions
- Continuing to explore new, low-cost development opportunities
- Continuing to support, strengthen and expand tourism services
- Continuing to advise other leaders and decision-makers of the need for infrastructure improvements to support tourism development
- A per capita increase in spend of 5% across all visitor categories on 2019 figures

- More diverse menu offerings, likely a return to those offered pre-pandemic, with more a la carte dining experiences available
- A few cruise ships will have visited, noting most interest is for late 2023 and 2024
- Increasingly utilising digital technology and social media, which should come alongside enhanced digital productivity and performance due to the activation of the fibre optic cable
- Increase in linked and group activities, including activities available outside Jamestown
- Feedback from visitors should include positive remarks about the cleanliness of the island
- Working with the BOSH and the tourism/hospitality sectors to ensure international back cards are accepted across the island
- Continuing to work with the accommodation sector to ensure business continuity, encourage use of commissionable (STO) rates and revenue management tactics, and to sign up with online booking platforms. Facilitating the booking of accommodation for the sector, as needed.

## Marketing

- Continuing to market to tour operators and independent travellers from carefully selected target markets through a combination of paid, owned, shared and earned content across a variety of mediums, platforms and outlets
- New branding should lead all marketing

efforts, with metrics in place for tracking brand performance

- Tourism website, collateral, digital and trade training platforms functioning optimally, with rolling metrics
- Any/all existent marketing-related plans and strategies reviewed/updated
- Have attended trade shows in the UK and SA, seeing tangible conversions from these activities
- Seeing benefits from the 2023 media and familiarisation trips, if budget allowed
- More than 5% of annual visitors (excluding cruise passengers) should be undertaking the visitor survey, which should reflect the destination receiving a rolling net promoter score (the likelihood of recommending others to visit St Helena) of greater than 60%.

## Capacity

- Tourist Office/Visitor Information Services operating 7 days a week and achieving a satisfaction score greater than 70%
- At least 20 people accredited through the rolling tour guide training programmes
- Structured hospitality training should be ongoing, with formal courses and recognised qualifications being offered, as well as in situ training, apprenticeships and work experience schemes being in place

- 
- An active Tourism Association should continue to represent the sector and increase its members. A St Helena Tourist Board should be established and functioning, providing oversight to St Helena Tourism and tourism functions.
  - Have reviewed all tourism functions, progress against recovery targets and the state of the sector in order to ascertain readiness to divest tourism functions.



# 16. Action Plan Q3 2022 - Q3 2024

The following pages describe the key actions that support the delivery of this strategy's objectives:

Action	Tactics	Supported objective(s)	Key issues	Impact	Lead	St Helena Tourism's role	Key partners	Time
Ensure timely tender process, contract awarding and booking availability regarding new aviation contract	Provide advice and information to support decision-making	Primary Objective	The expiration of the air service contract in Q3 2024 constrains medium-term planning and travel trade engagement	Minimise disruption to air service delivery (and therefore arrivals); ensure travel trade (who have lengthy lead times on bookings) can book flights well in advance	Civil Aviation, Procurement, VIS	Communicate updates in air service provision to prospective travellers and travel trade	Elected Members, St Helena Airport, airline, FCDO, key SHG officials, AG Chamber	From Q4 2022/23
Motivate for a midweek flight for peak season 2023/24	Provide advice and information to support decision-making	Primary Objective, 6	The resumption of midweek flights, ideally with Cape Town, would help quicken recovery	Increase air arrivals; provide flexibility of travel dates for visitors and tour operators (eg opening up the sought-after 10-day stays)	Civil Aviation, VIS	Continue to assess demand from travel trade for routes to St Helena and develop dual destination trips	Elected Members, St Helena Airport, Airlink, FCDO	From Q3 2022
Promote a sense of pride and openness towards attracting persons to visit St Helena	Demonstrate how tourism can directly and indirectly benefit residents	Primary Objective	For various historic reasons, local confidence in the tourism sector is low	Community buy-in for tourism is vital for success; Building pride should help preserve Saints' warm welcome	VIS, Marketing	Work with partners to extol the benefits of developing tourism so they will communicate these to the community; communicate benefits directly to community	Elected Members; SHG officers like Export Trade & Investment (ETI) and Comms; local media; education; tourism service providers	Q3 2022 - Q3 2024

Action	Tactics	Supported objective(s)	Key issues	Impact	Lead	St Helena Tourism's role	Key partners	Time
Create more opportunities for visitors to spend	Provide ideas and advice to tourism sector	1	Island is not maximising opportunities for tourists to spend	Increase daily spend across visitor categories	VIS	Demonstrate that grouping and linking activities and offering more early-morning and nighttime activities can increase spend	Tourism service providers, tour guides, DMCs	Q3 2022 - Q3 2024
Reduce banking-related barriers to spending	Promote local card/banking developments; support those that can increase access to banking services and cash	1	Island otherwise is not maximising opportunities for tourists to spend	Increase daily spend across visitor categories	BOSH, VIS	Provide advice to sector; promote the benefits of banking developments and facilities to visitors, travel trade and local businesses	Marketing, tourism service providers, tour operators, SHG officers (Financial Services Development Manager)	Q3 2022 - Q3 2024
Deliver revenue management training to tourism sector	Demonstrate the benefits of revenue management strategies to the sector	1	Assist private sector to maximise opportunities for tourists to spend	Increase island's revenue-earning potential	VIS	Demonstrate how to vary rates with changes in demand; show the benefits of offering STO rates; add value to off-season trips; incentivise early bookings	Accommodation sector, DMCs, tour guides	Q3 2022 - Q3 2024

Action	Tactics	Supported objective(s)	Key issues	Impact	Lead	St Helena Tourism's role	Key partners	Time
Organise events and activities to attract niche markets in the shoulder periods	Create and promote a year-long calendar of events	1, 5	Tourism demand is otherwise highly seasonal	Increase the destination's productivity	VIS, Marketing	Work with local and overseas partners to create and market diverse and attractive events	Elected members; event organisers and tourism stakeholders; niche tour operators; FINN PR; Big Ambitions PR	Q3 2022 - Q3 2024
Develop a Cruise Tourism Policy	Design and market costed itinerary options for cruise lines that are repeatable and scalable	1, 2, 5	Enhance destination's offering and performance within cruise market; lessen the issues created for the island's infrastructure with sudden, heavy footfall	Increase the destination's productivity and reputation	VIS, Solomon's	Work with partners to develop a Cruise Tourism Policy that optimises revenue through available service providers and activities, noting the impacts of heavy footfall on sensitive sites and capacity of island to deliver a quality experience	Key SHG officers like Port Control and Marketing, cruise lines	Q3 2022 - Q1 2023

Action	Tactics	Supported objective(s)	Key issues	Impact	Lead	St Helena Tourism's role	Key partners	Time
Develop Yacht Tourism Plan	Improve facilities for yachties	1, 2, 5	Increase opportunities for yacht arrivals to spend	Increase the destination's productivity and reputation	VIS	Work with partners to expand yachting season; make the Cape Town to St Helena Race an annual event; work with partners to improve facilities for yachties; expand capacity of moorings; optimise ferry service	St Helena Yacht Club, Royal Cape Yacht Club, sailing academies, tourism sector, SHG officers like Marketing	Q3 2022 - Q3 2024
Fund maintenance and development of key tourism assets	Seek funding sources outside recurrent budget	2	Help offset lack of funding to develop areas of built and natural heritage	Develop and diversify the tourism assets with best return on investment and market appeal	VIS, ETI	Continue to advise other leaders and decision-makers, and work with key stakeholders; prioritise available funding to projects that can increase tourist spending with quick returns	SHG portfolios, NGOs	Q3 2022 - Q3 2024

Action	Tactics	Supported objective(s)	Key issues	Impact	Lead	St Helena Tourism's role	Key partners	Time
Enter into partnerships that support development	Seek funding sources outside recurrent budget; ensure partnerships match brand	2	There is otherwise a lack of funding to develop areas of built and natural heritage	Develop and diversify the tourism product	VIS, ETI	Work with partners to ensure development of key assets with best return on investment	SHG portfolios, Saint Helena National Trust, Tourism Association, NGOs	Q3 2022 - Q3 2024
Increase the number and quality of tourism businesses	Encourage business development, skills transfer, succession planning and training	1, 3	Tourism's recovery and growth is otherwise constrained by the number and quality of tourism businesses	Improve visitor experience; strengthen and expand tourism services; increase local belief in sector; increase private sector earning potential	VIS, ETI	Work with partners to develop and implement training programmes; promote the benefits of working in tourism; track sector growth to ensure service gaps are filled	Trainers, education, Career Access Office, Tourism Association, tourism stakeholders	Q1 2023 - Q3 2024
Fund maintenance and development of key tourism assets	Seek funding sources outside recurrent budget	2	Help offset lack of funding to develop areas of built and natural heritage	Develop and diversify the tourism assets with best return on investment and market appeal	VIS, ETI	Continue to advise other leaders and decision-makers, and work with key stakeholders; prioritise available funding to projects that can increase tourist spending with quick returns	SHG portfolios, NGOs	Q3 2022 - Q3 2024

Action	Tactics	Supported objective(s)	Key issues	Impact	Lead	St Helena Tourism's role	Key partners	Time
Improve sector communication regarding restaurant offerings	Use feedback collected through VIS to increase awareness of offerings	1, 3	Improved attractiveness of eating places; increased amount of attractive eating places	Improve visitor experience; strengthen tourism services	VIS, Marketing, ETI	Organise workshops and engagements to understand constraints; encourage use of more local ingredients and develop more memorable dining experiences	Tourism Association; restaurant owners/chefs; local food producers; SHG's dietician; importers and retailers	Q3 2022 - Q3 2024
Encourage private sector to develop and diversify accommodation	Improve access to funds to develop the island's accommodation offering	4	Tourism's recovery and growth is otherwise constrained by the availability of quality serviced rooms	Increase and optimise accommodation capacity	VIS, ETI	Work with partners to improve access to capital to develop accommodation	SHG; FCDO; BOSH; investors	Q3-Q4 2022/23

Action	Tactics	Supported objective(s)	Key issues	Impact	Lead	St Helena Tourism's role	Key partners	Time
Ensure a mix of available accommodation types at a range of price points to meet demand	Work with established providers to maximise occupancies; encourage addition of new rooms to the island's inventory	4	Tourism's recovery and growth is otherwise constrained by the availability of quality serviced rooms	Increase accommodation capacity	VIS, ETI	Facilitate bookings; collate feedback on accommodation services; devise accommodation accreditation scheme	Accommodation sector; SHG officials; local and overseas investors	Q3 2022 - Q3 2024
Increase the usability of, and access to, the ways accommodation is advertised	Encourage service providers to market their own properties; enhance and maintain tourism website	4	Tourism's recovery and growth is constrained by the lack of modern booking systems	Modernise booking processes more in line with visitor expectations; increase ease of extracting money from visitors	VIS	Encourage accommodation providers to utilise relevant online booking platforms (e.g. AirBnB, Booking.com, local platforms)	Tourism stakeholders; local booking platform(s); international booking platform(s)	From Q4 2022/23

Action	Tactics	Supported objective(s)	Key issues	Impact	Lead	St Helena Tourism's role	Key partners	Time
Market key products, services, niche interests and developments as they evolve, whilst maintaining baseline awareness, and building recall of St Helena	Utilise a strong, on-brand marketing mix of paid, shared, earned and owned content across a variety of mediums and platforms; targeting key demographics and markets, ensuring value for money in activities	5, 6	St Helena is relatively unknown as a tourist destination in the global marketplace, so otherwise potential visitors are unaware of reasons to visit	Improved destination awareness and recall in target audiences, increasing chances of people booking trips to the island; quality, on-brand and targeted marketing ensures benefits of developments and offerings are reaped	Marketing, VIS	Deliver rolling marketing strategies and plans through digital and traditional methods to prospective visitors and travel trade; ensure direct, on-brand marketing occurs through customer service provided via Toursit Office; ensure Marketing is aware of updates to publicise; lead direct marketing to tour operators	Tour operators; key target markets; SHG Comms, Big Ambitions PR, Finn Partners PR; tourism stakeholders	Q3 2022 - Q3 2024

Action	Tactics	Supported objective(s)	Key issues	Impact	Lead	St Helena Tourism's role	Key partners	Time
Implement new branding	Enact brand strategy, plan, visual identity guidelines and metrics	5	Destination has lacked brand identity; brand will better align tourism with the authentic destination experience and values/goals of the community	Cohesive identity that allows people to build recognition, recall and trust with St Helena – therefore increasing chances of visits and return visits	Marketing, VIS	Roll out and drive brand locally and internationally	Elected members; tourism stakeholders SHG Comms, Big Ambitions PR, Finn PR	From Q3 2022
Facilitate familiarisation (FAM) trips	Seek tour operators, agents and media representatives with best return on investment for St Helena	6	Increase publicity for island; increase number and quality of tour operators selling St Helena	Maintain awareness and networking; increase amount of tour operators successfully selling St Helena	VIS, Marketing	Ensure most suitable tour operators are selected that give best long-term return on investment; deliver FAM trip(s) that showcases an exceptional first-hand visitor experience	TTG, The Africa Hub, Island Innovation, Inspire Global, World Travel Market, We Are Africa, Experience Africa, Finn Partners, Big Ambitions; Airlink, cruise lines, sailing academies	Q1 2023; Q1 2024

Action	Tactics	Supported objective(s)	Key issues	Impact	Lead	St Helena Tourism's role	Key partners	Time
Train tour operators to sell St Helena	Target tour operators who align with the island's offering	6	Very few tour operators are selling St Helena	Increase visitor arrivals	VIS, Marketing	Continue to deliver product training through online platforms and boost engagement through select trade/B2B platforms	Online training travel shows in UK and SA, UK and SA- based PR companies	Q3 2022 - Q4 2024
Recruit staff	Add three additional posts within the Marketing and Tourism section of SHG	1, 3, 7	Otherwise, insufficient capacity in SHG to deliver all tourism functions to meet the objectives of this recovery strategy	Ensure adequate resourcing for expected service delivery; strengthen capacity; improve the St Helena experience; strengthen and develop tourism and marketing services	Sustainable Development	Secure a Tourism Officer and Marketing Support Officer; motivate for a Hospitality Trainer to assist in the development of private sector businesses (similar to the ESH Hospitality Trainers)	SHG, FCDO	From Q1 2023

Action	Tactics	Supported objective(s)	Key issues	Impact	Lead	St Helena Tourism's role	Key partners	Time
Train and accredit service providers	Increase number and quality of service providers	1, 3, 7	Otherwise, insufficient private sector capacity to deliver all tourism functions to meet the objectives of this strategy	Strengthen capacity and develop skills; improve the St Helena experience; strengthen and develop tourism services	VIS	Develop hospitality training plan; roll out a tour operator training programme; encourage use of SHG's strategic assets as training premises; work with private sector and education to deliver in-situ/online/classroom training	SHG, trainers, tourism stakeholders	Q3 2022 - Q3 2024
Formation of Tourist Board	Seek ministerial approval	8	Lack, otherwise, of oversight of tourism sector	Oversight of tourism functions, support for the sector and a coherent voice to government	VIS	Provide advice and information to support decision-making	Elected Members, tourism sector	Q4 2022/23

Action	Tactics	Supported objective(s)	Key issues	Impact	Lead	St Helena Tourism's role	Key partners	Time
Reignite Tourism Association	Understand the future intentions of Tourism Association and encourage meetings	8	Otherwise, lack of formal representation of tourism sector	Increased representation of sector	VIS	Provide information to the sector; encourage the sector's participation to strengthen the TA to give service providers a voice; support TA's objectives	Tourism Association, all tourism-related businesses	Q3-Q4 2022/23
Improve performance of all tourism functions	Meet milestones and targets described in the SEDP	9	SHG intends to make tourism functions attractive enough to divest, however has some work to do	Deliver on divestment of tourism functions	VIS, Sustainable Development	Deliver objectives of this strategy to develop tourism as an attractive model for divestment in to the private sector; regularly review performance of tourism functions	All tourism stakeholders	Q3 2023, Q3 2024



**St Helena Government**  
**Tourism Recovery Strategy**  
**2022 - 2024**

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