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Tourism Potential Assessment for Ascension Island

February 2019

Prepared for:

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Contents

EXECUTIVE SUMMARY	3
1. INTRODUCTION	5
2. ACCESS AND TOURIST ARRIVALS	6
2.1 Air Arrivals	6
2.2 Sea Arrivals	7
3. LEISURE TOURISM PRODUCT	9
3.1 Introduction.....	9
3.2 Game Fishing	10
3.3 Diving.....	11
3.4 Bird Watching.....	13
3.5 Marine Wildlife.....	14
3.6 SAVE Tourism	14
3.7 Geology	15
3.8 Flora.....	15
3.9 Walking.....	15
3.10 Dark Skies.....	16
3.11 History.....	16
3.12 Guided Tours	17
4. TOURIST FACILITIES.....	18
4.1 Accommodation	18
4.2 Food and Drink	18
4.3 Shopping.....	19
5. SWOT ANALYSIS	20
6. TOURISM POTENTIAL ASSESSMENT	21
6.1 Introduction.....	21
6.2 Marine Protected Area.....	22
6.3 Game Fishing	22
6.4 Scuba Diving	23
6.5 Niche Markets	23
6.6 Cruise Tourism.....	23
6.6.1 Current Situation.....	23
6.6.2 Growth of the Expedition Sector	24
7. RECOMMENDATIONS	26
7.1 Introduction.....	26

7.2	Reinstatement of a Dedicated Tourism Position within AIG	26
7.3	Game fishing and Scuba Tourism	27
7.4	Cruise Visitors	27
7.5	Potential Niches	28
7.5.1	<i>Atlantic Island Tours</i>	28
7.5.2	Ecotourism	28
7.6	Costs and Benefits of Developing Tourism	29

EXECUTIVE SUMMARY

At present, with the tourism sector all but non-existent due to the loss of the Airbridge link, it is a good time for Ascension Island to review its past tourism activities and consider its aspirations for future development of the industry. There is scope to develop a small but thriving tourism sector, although this requires specific focus on this sector to be able to achieve this. This would, without any doubt, be dependent on the resumption of the Airbridge link with the UK.

Tourism thrives in destinations that offer a unique or excellent *product* that sets them apart from other destinations. For island destinations, in particular remote ones, the quality of the *product* needs to be outstanding due to the additional costs that are usually incurred by visitors to reach them.

Game fishing is without a doubt the primary tourism product for Ascension Island. It is generally regarded amongst fishing enthusiasts as a destination that offers an abundance of especially large fish, and consequently there is strong justification for the costly journey to Ascension Island. Scuba diving is also highly regarded, although there is significant competition around the world with many other top class diving destinations. There is no diving chamber on the island and divers would require adequate insurance for emergency medivac. This raises issues of contingent liability for Ascension Island Government, and ultimately the UK Government, should a dive accident occur. Nevertheless there is scope for developing this sector.

Cruise tourism presents an opportunity for Ascension Island due to growth in the expedition cruise market, mainly as ships reposition between the Arctic and Antarctic regions. As Brazil and West Africa are not popular/safe destinations amongst cruisers, there is increasing interest in destinations along the mid-Atlantic ridge.

The implementation of an MPA around Ascension Island is expected to increase the desirability of game fishing and scuba diving, and justify higher prices for marine-based activities undertaken by tourists. However, due to the relatively limited number of tourists who can visit the Island, the volume of tourists may not actually be affected by an MPA, but it is possible the value (revenue from tourism) could be increased.

To develop tourism effectively a dedicated tourism development officer within AIG should be reinstated. This role should be similar to the previous position and include a range of tasks, including overseeing the lease and standards of accommodation provision, issuing licenses for businesses providing goods and services to tourists, and engaging with tour and cruise operators to encourage interest in Ascension.

Game fishing will likely remain the key driver for tourism in Ascension, and should be the main focus of the development of the sector. Demand for this activity is expected to challenge the supply of Airbridge seats and accommodation on the Island. Scuba diving is arguably the strongest secondary tourism product and offers considerable scope for development.

Ascension Island's other products are arguably best grouped to appeal to the ecotourism/natural environment special interest market. This provides the strongest marketing angle for enticing visitors to the Island. Combined, the bird life, turtles (when in season), geology, flora and historical sites make an interesting package.

Whilst cruise ship calls will always remain small due to Ascension's geographical position, there is potential for growth, to at least four to six calls per year. Ascension's market is predominantly the expedition cruises, and it is important to engage with this growing group of cruise operators.

The development of tours linking Ascension Island with the Falkland Islands has considerable potential. Both destinations offer a product that appeals to a similar market: bird watchers and those interested in the natural environment. Linking up with the Falkland Islands Tourist Board to promote twin-centre holidays (typically stopping in Ascension for three to seven days on a southbound or northbound flight between the UK and the Falklands) is likely to generate interest amongst tour operators, as well as independent travellers. Other South Atlantic island tours are possible, including the addition of St Helena and Tristan da Cunha.

Based on the assumption that there will be a resumption of the Airbridge link between the UK and the Falkland Islands, and a desire within AIG to develop tourism, it is assessed that a small but well-organised tourism sector on Ascension could generate a net positive income for the annual AIG Government budget.

1. INTRODUCTION

This study was commissioned by the South Atlantic Environmental Research Institute (SAERI) to undertake an assessment of the potential for tourism on Ascension Island. The findings contribute evidence to a programme of natural capital assessment (NCA) being implemented by the UK Joint Nature Conservation Committee (JNCC) and conducted by the South Atlantic Environmental Research Institute (SAERI) in the UK South Atlantic Overseas Territories. Funded by the Foreign and Commonwealth Office (FCO) managed Conflict, Stability and Security Fund (CSSF), the work sits under its Environmental Resilience programme which includes objectives to integrate natural capital considerations into economic and social development planning.

A consultation workshop held on Ascension in June 2018, followed by a smaller Advisory Group meeting, resulted in priority areas being identified by on-island key stakeholders for further study. This assessment of the future potential for tourism on Ascension Island was one of these priority areas. It was undertaken by Acorn Tourism Consulting Limited (Acorn) and desk research was conducted along with phone interviews with various stakeholders on Ascension Island and around the world - in particular with cruise operators.

It should be noted that this report aimed to bring together knowledge, much of which is not necessarily new, but may have been lost due to regular staff turnover on Ascension Island, and therefore when undertaking this study the challenge was to bring together past and present data into a single report based on the information that was available, providing a current day 'snapshot' for the island

The main aims of the study were to:

- Undertake baseline research of the natural and built tourism product.
- Undertake a tourism demand assessment of arrivals and expenditure.
- Assess market access, identifying what is required to increase demand.
- Assess the potential economic impact of developing tourism.

Developing tourism in destinations with limited access usually focuses on increasing value rather than volume. In other words, increase the expenditure of visitors rather than the number of visitors. To a large extent, in Ascension this should also be the cornerstone of a tourism development strategy, although there is some scope for growth in visitor numbers arriving on cruise vessels.

At present, with the tourism sector all but non-existent due to the loss of the Airbridge link, it is a good time for Ascension Island to revisit its aspirations with regards to the development of tourism. There is scope to develop a small but thriving tourism sector, although this requires a certain level of dedication to achieve. This would, without any doubt, be dependent on the resumption of the Airbridge link with the UK.

2. ACCESS AND TOURIST ARRIVALS

2.1 Air Arrivals

Air access is currently limited to the once monthly SA Airlink flight from St Helena. This operates as a charter on this route, arriving on the second Saturday of each month and departing on the following morning (Sunday). During the Austral summer months a trial second flight was laid on due to demand, giving the opportunity for a three-day stopover.

At present the RAF Airbridge (operated by AirTanker) linking Brize Norton and Mount Pleasant in the Falklands has been re-routed via Cape Verde due to essential runway repair work on Ascension. Assuming flights resume (potentially by 2020) following the previously operated schedule, there will be approximately ten seats available for non-military passengers to Ascension Island on each southbound and northbound flight.

Table 2.1: Inbound Flights to Ascension Island

From	Operator	Frequency	Seats	Approx Seats per Month	Approx Return Fare* (£)
JNB via HLE	SA Airlink	Monthly	98	98	£2,000
HLE	As above				£845
BZZ	RAF	Twice Weekly	10	90	£1,122
MPA	RAF	Twice Weekly	10	90	£1,122
Total				278	

Source: *Acorn*

Notes: * RAF fares lower for people working on Ascension Island and their families, and those living in the Falkland Islands.
JNB – Johannesburg (South Africa)
HLE – St Helena
BZZ – Brize Norton (Oxfordshire, UK)
MPA – Mount Pleasant (Falkland Islands)

Visitor arrival data have historically not been broken down by purpose of visit, but there are inconsistent records of those arriving for sports fishing. An assumption that approximately 1/6 of all arrivals are tourists was made to estimate 'pure' tourism arrivals (Ascension Island personal communications). Tourist arrivals for leisure purposes (as opposed to purposes such as business, visiting friends and relatives, and transit) were estimated to be around 35 in 2018. The number peaked at around 240 in 2016 (Table 2.2). With the closure of the runway for Airbridge flights in April 2017, numbers dropped considerably, and indeed leisure tourism ceased to exist in any economically significant form.

Table 2.2: Overnight Visitor Arrivals to Ascension Island by Air

Year	Leisure Arrivals			Total Visitors (all purposes)	Expenditure by Leisure Arrivals		
	Fishing Visitors	Other Leisure Visitors	All Leisure Visitors		Fishing Spend	Other Spend	Total Spend
2012	6	147	153	917	£3,000	£148,812	£151,812
2013	33	123	156	936	£16,500	£169,764	£186,264
2014	225	0	225	1,103	£112,500	£213,851	£326,351
2015	217	8	225	1,351	£108,500	£206,721	£315,221
2016	195	46	241	1,446	£97,500	£218,457	£315,957
2017	138	0	138	0	£69,000	£128,528	£197,528
2018	35	35	0	35	£0	£35,738	£35,738

Source: AIG

Notes: Estimated average spend on fishing/trip: £500
Estimated average spend/day on accommodation and food: £83

Game fishing dominates the main reason for visiting amongst leisure arrivals, certainly in recent years. Over the last seven years, visitors arriving for fishing have accounted for 69% of all leisure arrivals.

Based on average expenditure estimates over the last seven years that include fishing trips, accommodation, food and drink, and entry visas, leisure tourists spent an average of £1,258 per trip or £111 per night. During those years when the visitor numbers were the highest (2014-2016), expenditure by leisure tourists amounted to around £320,000 per annum.

2.2 Sea Arrivals

A few cruise vessels visit Ascension Island each year, typically staying for one day. In 2019 there are two cruises scheduled to visit, as follows:

- Crystal Cruises (*Crystal Serenity*): part of an 84-night cruise departing Los Angeles on 13th January 2019 and ending in Monte Carlo on 8th April 2019. Due to call at Ascension Island on 23rd March (previous port: St Helena, next port: Dakar). Time at anchor: 8am to 6pm; passengers: 908-1,254. However, it has subsequently emerged that this cruise will now be unable to dock on this date on account of cargo operations in Ascension scheduled between 18th and 24th April.
- Fred Olsen Cruise (*Boudicca*): part of a 35-night cruise departing Tenerife on 10th October 2019 and ending in Seychelles on 14th November 2019. Due to call at Ascension Island on 20th October (previous port: Cape Verde, next port: St Helena). Time at anchor: 8am to 6pm; passengers: 880.

In 2020, Oceanwide Expeditions plans to operate the *Plancius* on a 10-day cruise from St. Helena to Cape Verde, commencing on the 22nd April 2020. The stop in Ascension Island is expected to be on day 5. The *Plancius* carries up to 116 passengers. In 2021, *Crystal Symphony* is due to dock on 1st April, although is still awaiting its booking confirmation from AIG.

Ascension's isolated location makes it an infrequent stop for yachting visitors. However it does receive a small number of passing yachts each year.

3. LEISURE TOURISM PRODUCT

3.1 Introduction

Tourism thrives in destinations that offer a unique or excellent *product* that sets them apart from other destinations. For island destinations, in particular remote ones, the quality of the *product* needs to be outstanding due to the additional costs that are usually incurred by visitors to reach them. In other words, the greater the barriers, the more attractive the tourism product must be to encourage visitors.

There is little doubt that Ascension Island, if located off the coastline of a popular tourism destination, would attract many visitors for activities such as walking, historical sites, star gazing, etc. However, these activities will attract few, if any, visitors with access being both difficult and expensive.

Tourism development therefore has to focus on the outstanding products on Ascension Island. Other products (such as walking, historical sites, etc.) may well benefit from tourism, but these activities will be additional to the main attraction – the key reason a visitor travels to the island.

The main tourism products on Ascension are described in brief in this Chapter. They can be classified as being primary, secondary or ancillary products. Primary products offer unique selling points, and are typically attractions that allow destinations to compete successfully with other destinations.

Secondary products are not as strong as primary ones, although for some visitors these represent attractions that still merit visiting the destination for. Ancillary products are those attractions for which it would be highly unusual to travel to the destination for, but which might be sought by visitors as an additional activity whilst there, as shown in Table 3.1.

Table 3.1: Ranking of Leisure Tourism Products on Ascension Island

Primary	Secondary	Ancillary
Game Fishing	Diving	Walking
	Marine Wildlife Life	Dark Skies
	Geology	History
	Flora	
	Scientific, Academic, Volunteer and Education Tourism (SAVE)	

3.2 Game Fishing

Fishing is one of the world’s most popular recreational sports. Game fishing is believed to attract around 58 million anglers globally, generating £30 billion in revenues. Participation in game fishing is on the rise amongst a predominantly male base (69%) and more than two in five participants are aged 45+ (44%). The Atlantic offers some of the best game fishing opportunities in the world. Cape Verde, Bermuda, Mexico and the Bahamas are popular game fishing locations; further afield, the coasts off Kenya and Mozambique are renowned for plentiful stocks of big game fish.

Game fishing is the primary tourism product for Ascension Island. Generally regarded amongst fishing enthusiasts as a destination that offers an abundance of especially large fish, there is strong justification for the costly and time-consuming journey that reaching Ascension Island involves. Fishing around Ascension Island is branded by many operators as *the Underwater Jurassic Park* or *the Jurassic Atlantic*, clearly placing the focus on the size of many game fish species.

Fishing tends to fall into the following three categories. Many visitors participate in two, or all three, activities during a trip.

Table 3.2: Categories of Game Fishing

Fishing Activity	Typical Catch
Inshore (Rock Fishing)	Common catches are grouper, silver fish, soldier fish, moray eel
Offshore (Sport Fishing, Game Fishing)	Big ‘pelagics’ (defined as fish that inhabit the water column, i.e. not near the bottom or the shore), especially tuna, sailfish, marlin, wahoo, jacks, mahi mahi (dolphin fish)
Spearfishing	Using freediving as the fishing technique, spear divers target for the large pelagics, e.g. yellowfin tuna, wahoo.

Three commercial fishing operators had business licenses to operate on Ascension and employ staff, typically bringing UK clients to fish for one week. They used their own accommodation on the Island, or utilised the Obsidian Hotel. All three companies (see Table 3.3) are no longer operating on Ascension. Their boats are still on Ascension and it is understood that they may want to resume if Airbridge access is restored. Currently a boat operates from the US Base on weekends, and takes paying customers, but this is for current residents or visiting contractors only.

Overseas-based inbound operators selling tours to Ascension Island in the past have included: SFC Travel, Five Star Travel, Sportquest, Go Fishing Worldwide, Extreme Bluewater Spearfishing.

Table 3.3: Game Fishing Operators in Ascension

Operator	Details
Atlantic Fishing Charter (AFC)	<p>Operates in the Canary Islands, Cape Verde and Ascension.</p> <p>Boat: Harmattan, a 36ft Rampage, 9-hour fishing day.</p> <p>Main goal: Blue Marlin; other target fish are tuna, wahoo, dorados, sharks and jacks.</p> <p>http://atlanticfishingcharter.com/ascension-island</p>
Ascension Island Fishing Charters (AIFC)	<p>AIFC Spearfishing & Game Fishing Ascension Island. Colin Chester - based in UK out of season.</p> <p>Boat: Reel Blessed, a 38ft Carolina Custom</p> <p>Branded as: Untouched and untouchable since its origins, Ascension Island is heaven on earth for Spearfishing lovers and blue water hunting enthusiasts</p> <p>Main goal: Yellowfin tuna, bigeye tuna, wahoo, amberjack, dorado, sailfish, marlin</p> <p>www.spearfishing-adventures.com</p>
Ascension Island Adventures (AIA)	<p>Craig Hall – fishing and snorkelling guide; Ellen Cuylaerts – underwater photographer</p> <p>Boat: The Argonaut, a 38ft custom boat. Fishing charters for up to four fishermen</p>

3.3 Diving

With more than 25 million PADI-registered divers, 6 million active divers and 11 million snorkellers worldwide, the dive tourism industry is substantial and is estimated to be worth between £15 billion and £25 billion. The most popular dive sites tend to be those with coral reefs that support a huge abundance of marine life and with features such as deep walls and escarpments edged with coral, and wrecks. World-class dive sites include Raja Ampat in Indonesia, Sipadan Island in Malaysia, Great Blue Hole in Belize and the Red Sea in Egypt.

Diving around Ascension Island is exceptional, and according to many sources it is a highly desirable destination amongst divers. Its isolation makes the waters a natural marine reserve, which divers crave. Divers tend to be of the more adventurous type, largely due to the

challenges and costs of reaching Ascension, but also because of the inherent complexity of diving at such extended range from normal support (search and rescue is limited to AIG's fire and rescue twin-engine RIB, and there is no decompression chamber on the Island).

Key attractions and benefits of diving in Ascension waters are:

- Unique assemblage of marine species from the Caribbean, Mediterranean and West Africa that is found nowhere else in the world
- Huge abundance of marine life
- 'Critters' for macro photography
- Pelagics, including Galapagos sharks, for adrenaline junkies
- Range of wrecks, including newly discovered wheeled contraptions, 'chariots', thought to be gun carriages from the Second World War
- 35 known endemic marine species and the unusual abundance of black triggerfish (*Melichthys niger*). Easy accessibility to a number of dive sites direct from shore, although currently logistically challenging to access offshore sites.
- Snorkelling possible at most dive sites, although English Bay and Comfortless Cove are the best beaches for this activity

There are currently two membership clubs on the island, Atlantis Divers and Ascension Divers (Table 3.4,) which principally cater for Island residents. There are no commercial organisations. Some local boat operators will take divers out on an ad hoc basis.

Table 3.4: Diving Operators in Ascension

Operator	Details
Ascension Divers	PADI courses: Open Water, Advanced Open Water, Rescue Diver, Master Scuba Diver, Divemaster Offer cylinder fills at £5 per fill.
Atlantis Divers Branch BSAC, North Point	BSAC courses: Try Dive, Ocean Diver, Sports Divers, Dive Leader Features: Clubhouse, Compressor, Snorkel experiences

3.4 Bird Watching

Birdwatching is a serious and passionate recreational activity for many millions of people worldwide, and as an activity it is greatly enriched by travel. Enthusiasts range from casual birders to highly motivated specialists who are willing to pay more and travel further. Birds' annual migratory patterns play an important part in choice of destination, and tours to countries that lie on these routes are typically popular, such as Central and South America (Mexico, Colombia, Belize, Costa Rica and Panama) and Africa (Kenya, Tanzania, Uganda, Botswana and Namibia). Destinations with iconic and endemic species, such as flamingos, albatrosses and penguins, also have considerable allure.

Eleven seabird species breed on Ascension including one endemic, the Ascension frigatebird, which has returned to the main Island following the eradication of the feral cat population from 2001. Most still breed on neighbouring Boatswain Bird Island.

Table 3.5: Significant Bird Species on Ascension Island

Bird Species	Common Location
Ascension frigatebird (endemic)	Boatswain Bird Island, Letterbox Peninsula
Sooty tern	Wideawake Fairs
Masked booby	Boatswain Bird Island, Letterbox Peninsula,
Brown booby	Long Beach
White terns	Coastal cliffs, Green Mountain
Black noddy	Coastal cliffs, Pillar Bay
Brown noddy	Wideawake Fairs
Red-billed tropicbird	Boatswain Bird Island, Pillar Bay
Yellow-billed tropicbird	Boatswain Bird Island, Pillar Bay
Madeiran storm petrel	Boatswain Bird Island

Typical bird watching activities on Ascension Island include:

- Boat trip around Boatswain Bird Island.
- Walking on the Wideawake Fairs.
- Hiking to and around Letterbox Peninsula, overlooking Boatswain Bird Island.

3.5 Marine Wildlife

As a sub-sector of wildlife tourism, marine wildlife tourism includes activities such as whale and dolphin watching, shark diving and wildlife cruises. Some activities such as turtle watching enable participants to become involved in conservation studies as part of SAVE tourism (see Table 3.6 below), and example destinations include Costa Rica, Sri Lanka and Malaysia.

Table 3.6: Significant Marine Wildlife on Ascension Island

Species	Common Location
Green sea turtle	Long Beach, Georgetown
Land crabs	Green Mountain, other high places

Typical marine wildlife activities on Ascension Island include:

- Turtle watching: January to June (nesting season) observed after dark, turtles lay their eggs into the sand and return to sea.
- Land crab spawning: on two nights in each February, March and April, coinciding with the phases of the moon, more than 1,000 crabs can be observed releasing their eggs into the surf.

3.6 SAVE Tourism

SAVE is a tourism concept that combines four specific niche markets of tourist demand – Scientific, Academic, Volunteer and Education. Participants typically join programmes that have been created by local businesses, non-profit organisations, and governmental bodies and promoted to a wider public via specialist tour operators. There is much overlap between the four niches; becoming involved in a turtle-conservation project could be regarded as both scientific and academic, as well as volunteering if the position is unpaid.

The Ascension Island Conservation Department manages several projects with funding from a number of overseas organisations such as the RSPB, JNCC and the Darwin Initiative. In addition, the department retains links with other UK Overseas Territories governments, universities, NGOs and other institutes. Conservation on the Island is of significant importance given the important biodiversity and high levels of terrestrial and wildlife endemism. Ascension also supports the largest green turtle nesting colony in the tropical South Atlantic region, alongside important seabird nesting colonies. There is long-standing and highly-competitive Marine Turtle Conservation internship programme on the Island which is open to marine biology and conservation graduates. Flights and basic living costs are covered by AIG.

Consequently, there is scope for the development of this segment, even though it does not exist at present. This is discussed further in Chapters 6 and 7.

3.7 Geology

There are a number of niche tourism markets that are growing in popularity, in particular those related to the natural environment. These include the study of geology and botany, which typically formed one part of an adventure, cultural or other form of trip, but are now becoming important niches in their own right.

Ascension Island is entirely volcanic, the tip of a shield volcano rising 1.8 kilometres from the seabed. It features 44 dormant craters, and the ground is covered by basalt lava flows and cinder cones, and beneath the surface are numerous caverns, lava tubes and fumaroles which at beach/sea level, manifest as blow holes. It therefore holds considerable interest amongst geologists, and has potential to attract these visitors as a niche destination.

3.8 Flora

Twenty five indigenous plants, seven endemics including the prolific Ascension Island spleenwort and the successfully reintroduced Ascension Island parsley fern, are of interest to those seeking native flora. Also there is a wide range of introduced plants, particularly on Green Mountain, as a consequence of Darwin and Hooker’s terraforming experiment conducted in the 19th century to increase rainfall. This story, and the mosaic of plants not normally seen next to each other, is an attractive one for keen botanists.

3.9 Walking

Outdoor pursuits such as hiking and walking have a large global following and are attracting growing numbers of participants, particularly as healthy, active lifestyles are increasingly pursued by an ageing population. Worldwide there are vast numbers of destinations offering varied terrain, striking natural environments and hikes for many abilities. Those with large areas of wilderness, forest, mountain or desert are typical for hiking adventures, and examples with well-known trails include Canada, Chile, England, Ireland and New Zealand.

Ascension Island has 42 Letterbox Walks, graded from 1 (easy) to 5 (very challenging). Similar in concept to the Post box Walks on St Helena, most take around two hours to complete; some take half an hour while some of the challenging ones can take up to five hours.

Table 3.7: Letterbox Walks on Ascension Island

Letterbox Walks	Details
Level 1; 9 walks	Generally flat or with slight gradient, e.g. Jubilee Walk around Georgetown

Level 2; <i>10 walks</i>	Straightforward path with a steady uphill climb, typically to the top of a cinder cone
Level 3; <i>13 walks</i>	Can include scrambling uphill over rocky boulders and/or negotiating thorny scrub
Level 4; <i>6 walks</i>	Challenging treks, often on exposed cliff ledges or with short sections of rope or ladder. More difficult, often require head for heights but do not require specialist equipment.
Level 5; <i>4 walks</i>	

Whilst these walks are of interest to many visitors, it would be highly unusual for them to travel to Ascension especially for the walking, unless combined with Geotourism activities. The walks provide additional activities for visitors, encouraging additional length of stay, and therefore expenditure.

3.10 Dark Skies

As a key feature of rural tourism, dark skies have been attracting increasing interest, particularly as the issue of light pollution gathers pace. In the UK, national parks are actively seeking to become designated Dark Sky Parks, and accommodation providers often supply telescopes and other equipment for their guests to enjoy stargazing. This type of initiative is a good way of adding value to a guest experience.

The quality of the dark skies is particularly good in the mid-Atlantic islands, with very little light pollution, making Ascension Island's skies a good destination for astronomy. However, it is not unique by any means in this regard, and there are many other more accessible destinations around the world that also offer excellent night skies. That said, visitors to Ascension could undoubtedly enjoy star gazing activities as an enhancement of their stay.

3.11 History

Cultural and historical tourism is a growth area and remote outposts in the middle of the Atlantic can offer some of the most exhilarating destinations – hard to reach, rich in history, incredible wildlife, and often volcanic.

Ascension Island's key historical attractions are:

- Ascension Island Heritage Society Museum
- St Mary's Church
- The Exiles (Marine Barracks until 1922)
- St George Tanks (built in 1830 as the Island's main water storage)
- Fort Bedford, one of three forts built on the island
- Turtle Ponds, built from 1815

All of these have significance to visitors interested in colonial and naval history.

3.12 Guided Tours

Guided tours to many of the attractions on and around Ascension Island can be booked through the Ascension Island Government. Table 3.8 provides key details, with costs where available.

Table 3.8: Guided Tours on Ascension

Tour	Duration / Cost £	Details
Island Tour	2.5-3 hours / £80 for up to six people	Georgetown, Long Beach, Green Mountain, Two Boats Village, Sisters Peak lava flow
Turtle Tours	£5 per person	Between January and June
Guided Tours on Green Mountain		
Guided Trip to Wideawake Fairs		Sooty tern colony
Tour of Conservation Department's Plant Centre on Green Mountain		Endemic plants of Ascension
Land-crab Spawning Tour	£5 per person	February, March, April – on two nights each month, timed with the phases of the moon
<i>Ascension Island Adventures Boat Tours:</i>		
Boatswain Bird Island Trip	£490 half day, £990 full day (4 pax)	Snorkelling, marine life spotting
Day around the island	£890 (4 pax)	Fishing, snorkelling, marine life spotting
Sunset Cruise	£400 (12 pax)	Afternoon trip around the coastline

4. TOURIST FACILITIES

4.1 Accommodation

Currently there's limited tourist accommodation on Ascension Island owing to the closure of Obsidian in September 2017, which previously managed all visitor accommodation on the island. Assuming that the same properties could be reopened by a new operator in due course, the available rooms on the Island would be as shown in Table 4.1

Table 4.1: Accommodation Facilities Ascension Island

Accommodation Establishment	Number of Rooms
Obsidian Hotel	17 rooms
Hayes House*	13 rooms
Clarence House*	20 rooms
Garden Cottage*	n/a
Paradise Beach Bungalow*	2 rooms
JAMS accommodation Two Boats	3 rooms?
Estimated Maximum Capacity	100-110 Guests

* All part of the Obsidian Hotel complex

4.2 Food and Drink

On Ascension, there are currently a small number of establishments serving food and drink, as shown in Table 4.2., although there were considerably more before the Airbridge closure. The four clubs operate a rotating nightclub on Fridays and Saturdays.

Table 4.2: Food and Drink Outlets on Ascension Island

Food and Drink Outlet	Location	Details
Anchor Inn & Restaurant, Obsidian	Georgetown	CLOSED
The Fishtrap	Georgetown	Mon-Sat
Saints Club	Georgetown	Daily, varied openings
Two Boats Club	Two Boats Village	Daily, varied openings

Volcano Club (US Airforce)	Cat Hill	Daily, varied openings
Mountain View Club (RAF)	Traveller's Hill	Daily, varied openings

4.3 Shopping

There is a small selection of shops on Ascension Island (see Table 4.3), mainly offering groceries. There is a limited selection of souvenirs available for leisure tourists seeking reminders or gifts from their trip.

Table 4.3: Shopping Outlets on Ascension Island

Shop	Location	Details
The Chandlery, Georgetown	Georgetown	Groceries and general items including, electrical goods and stationery
Glamour, Georgetown	Georgetown	Fashion and beauty products
Obsidian Hotel Gift Shop	Georgetown	CLOSED
Rock Shop	Georgetown	Men's, women's and children's clothes and shoes; gifts and jewellery
Sue Ryder Boutique	Georgetown	Charity shop; used clothing
JAMS	Two Boats Village	Groceries
NAAFI	Traveller's Hill	Groceries

5. SWOT ANALYSIS

The SWOT (Strengths, Weaknesses, Opportunities and Threats) chart below provides an evaluation of Ascension Island from the perspective of its tourism development potential. The purpose of a SWOT chart is to identify:

- The strengths of a destination, which are the obvious focus for tourism development
- The weaknesses that could constrain development
- The opportunities that could be turned into strengths
- The threats that could damage the strengths and opportunities

Strengths	Weaknesses
<p>Game Fishing is amongst the best in the world</p> <p>Diving is world class</p> <p>Remote adventure island offering opportunities for bird watching, walking/hiking, turtle viewing and historical interest</p> <p>Year-round tourism (little seasonality)</p>	<p>Limited air access</p> <p>Few places to eat and drink</p> <p>Relatively basic accommodation (and highly limited at present)</p> <p>Poor communication (Internet speed)</p> <p>Difficult and unpredictable to access by sea (for cruise landings)</p> <p>No dedicated official developing and promoting tourism within AIG.</p> <p>Tourism is not valued as a primary sector at present</p> <p>Tourists restricted by military presence</p> <p>No right of abode, so the private sector does not flourish</p>
Opportunities	Threats
<p>Airbridge resumption (potentially in 2020)</p> <p>Air link with St Helena if it increases in frequency</p> <p>Establishment of a marine protected area (MPA) by 2020 – Blue Belt Programme</p>	<p>Air access and the uncertainty of Airbridge operation</p> <p>Current inability within AIG to develop a tourism sector</p>

<p>Rapidly expanding expedition cruise sector, and Ascension Island's position broadly en route for relocating vessels between the Arctic and Antarctic</p> <p>Development of an organised tourism sector to generate revenue for the Island</p> <p>Increasing bird and plant life due to successful conservation efforts</p>	<p>Uncertainty over future economic development of the Island</p>
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6. TOURISM POTENTIAL ASSESSMENT

6.1 Introduction

Ascension Island is a small destination with limited facilities to support tourism. Even with the re-commencement of the Airbridge, which is essential for any of the recommendations made within this report, access is severely restricted. Accommodation is also limited in capacity, although is arguably in proportion to the available seats on incoming aircraft.

The development of tourism on Ascension has historically been constrained by the military presence on the Island, the number of seats available on military planes, and an inconsistent approach to the sector. Consequently it has developed without any underpinning strategy, and at present, with the loss of the Airbridge, ceases to exist in any meaningful form.

The Airbridge link with Brize Norton is absolutely critical for tourism to develop on Ascension. The current monthly Airlink flight between Ascension and St. Helena does not offer any realistic options for the development of leisure tourism, unless it is operated more frequently. There is little or no appetite for visitors to stay for one month on the Island, even though one UK operator, Five Star Travel, is promoting a month long trip to Ascension for 20 days of boat-based fishing. However, should this connection with St Helena ever be increased to two flights a month (fortnightly), it could potentially open up Ascension to the South African market, in particular for game fishing. This scenario has not been explored further in this report, as there has been no indication that increased flights are being considered at present.

Once re-connected with the Airbridge, the northbound flight from Mount Pleasant Airport offers little opportunity for tourism due to the highly limited market - around 3,000 residents on the Falkland Islands. Therefore, it can be concluded that the key link for overnight leisure visitors to Ascension are the (approximate) 90 seats a month on the southbound Airbridge flight. There may of course be occasions when tourists visiting the Falklands stop off in Ascension en route home, on the northbound flight. Overnight tourism will, therefore, always be small in Ascension, although this doesn't mean it cannot generate relatively significant revenues. Saints often overnight on Ascension en route between the Falkland Islands and St Helena, for instance, and may pay for fishing trips etc. whilst on island.

Day visitors on cruise vessels do not need to rely on air links and, for these arrivals, there is scope for growth that is only limited by the desire of cruise operators to visit Ascension, and the market demand to fill these berths.

6.2 Marine Protected Area

Through its Blue Belt Programme, the UK Government is supporting its commitment to support the establishment of long-term protection for over four million square kilometres of marine environment around five of its overseas territories, including Ascension Island. AIG is currently considering various resource management options for Ascension waters, and whilst the outcome is currently uncertain, there is an understanding that the chosen solution is likely to be an MPA that excludes commercial fishing in at least 50% of the EEZ. How game fishing would sit within a 100% no-take MPA is not yet clear, and NGOs might raise concerns over this. Catch and release only could be an option.

The marine environment and birdlife are the core tourism products in and around Ascension, and without them the appeal of the destination would significantly diminish. Therefore, any strategy that focuses on their protection can be considered positive. However, it would be misleading to suggest that the establishment of an MPA will have a direct positive impact on tourism in the short to medium term, in particular as the volume of visitors is so small and demand is relatively high.

Nevertheless, surveys of tourists have shown that people are willing to pay more for the experience if the area they are visiting is protected, whether this be on land or at sea. They will also pay more to visit areas where the species they are seeking are more likely to be present, or exist in greater numbers.

So in summary, the implementation of an MPA around Ascension Island is expected to increase the desirability of game fishing and scuba diving, and justify higher prices for marine-based activities undertaken by tourists. However, due to the relatively limited number of tourists who can visit the Island, the volume of tourists may not actually be affected by an MPA, but it is possible the value (revenue from tourism) could be increased depending, of course, on the type of MPA that is eventually designated.

6.3 Game Fishing

According to game fishing tour operators interviewed for this study, Ascension Island is one of the best (if not the best) fishing areas in the world. There is great anticipation of the re-connection of Ascension Island with the UK, whenever that may be, and there is likely to be considerable pent-up demand by the time that happens.

Despite the quality of the game fishing product, Ascension is an expensive destination to reach for those people living outside of the UK. It will therefore remain predominantly a UK market destination.

Sportquest, based in Norwich, was one of the most active overseas operators sending visitors to Ascension (around 75-100 annually), typically in groups of four, for a two-week trip. Client satisfaction was excellent, although the poor quality of the accommodation was often commented on. Sportquest will definitely be looking to resume operations in Ascension as and when the Airbridge resumes. As well as the upcoming MPA designation, AIG will be developing inshore management plans. Licensing and monitoring of game fishing will be an integral part of these plans and could bring additional income in license fees.

6.4 Scuba Diving

Whilst the scuba diving product in Ascension is reported to be excellent, there are many other competing destinations around the world. However, there is a niche market of experienced divers who are continually seeking 'new' destinations. Ascension, by virtue of its difficult-to-visit location, falls into this category.

Whilst there is no significant history of dedicated diving trips (in the same way as game fishing) on Ascension, there is potential to develop this with a more organised and marketed approach. However, there is no diving chamber on the island and divers would require adequate insurance for emergency medivac. This raises issues of contingent liability for Ascension Island Government, and ultimately the UK Government, should a dive accident occur.

6.5 Niche Markets

Ascension Island offers potential for many niche markets, attracting visitors interested in geology, botany, and dark skies. Whilst these markets are generally relatively small, Ascension Island's capacity for tourist arrivals is also small, and therefore it does not need to attract large volumes of visitors. For destinations like Ascension Island, the advantage of targeting niche markets is that the consumers interested in them tend to follow a narrow number of publications, websites and social media channels, which makes targeting potential visitors much easier.

6.6 Cruise Tourism

6.6.1 Current Situation

During research for this report, interviews were held with 10 expedition cruise operators, some of who reported difficulties arranging visits to Ascension Island. Issues ranged from lack of communication to cruise ship visits clashing with supply ships using the pierhead.

Princess Cruises and Holland America are currently trying to finalise two visits to Ascension. Without various confirmations from AIG, these visits will be re-routed:

- April 2019: Princess Cruises - Pacific Princess from Cape Town to Rio, with 600 passengers

- April 2020: Holland America - Amsterdam: Namibia to Fort Lauderdale, with 600 passengers

Crystal Cruises reported a date clash with a supply vessel, leading to the possible loss of the Crystal Serenity visit on 23rd March 2019.

These issues are likely to lose Ascension cruise business as vessels switch to other destinations.

6.6.2 Growth of the Expedition Sector

The expedition cruise sector is expanding rapidly, and there are 28 new expedition-style vessels scheduled for launch over the four years between June 2018 and June 2022. The new ships are set to surpass the level of luxury currently seen in the market, and there are several new entrants such as Scenic Cruises and Mystic Cruises. A total of 11 new ships will join the expedition fleet in 2019 alone.

These new ships will offer a level of comfort that far exceeds those offered by the original expedition vessels, which were the iconic rugged and functional Russian research ships. Growth over the years has been led by Silversea and Ponant; the latter expanding particularly aggressively in recent years with seven new ships to follow after the launch of Le Laperouse in June 2018.

Although expedition vessels will remain relatively small, they are increasing in size. Over the next three years, there will be launches of at least 27 expedition vessels (see Table 6.1), which exclude ships that are being built for specific destinations such as the Galapagos. The average number of berths on these ships is 236, and the offer is diverse from 3-star adventure to 6-star luxury.

Table 6.1: Expedition Cruise Vessel Launches 2019-2021

Name	Company	Pax
2019		2,634
Hanseatic Nature	Hapag-Lloyd	230
Roald Amundsen	Hurtigruten	530
Hondius	Oceanwide Expeditions	196
Fridtjof Nansen	Hurtigruten	530
Le Bougainville	Ponant	180
Le Dumont-d'Urville	Ponant	180
Greg Mortimer	SunStone / Aurora	160
Hanseatic Inspiration	Hapag-Lloyd	230
Magellan Explorer	Antarctica XXI	100
TBC	Ritz-Carlton	298
2020		1,274
NG Endurance	Lindblad Expeditions	126
Le Bellot	Ponant	180

Crystal Endeavour	Crystal	200
Eclipse II	Scenic	228
Le Surville	Ponant	180
TBC	SunStone	160
TBC	Quark Expeditions	200
2021		2,468
TBC	Ritz-Carlton	298
TBC	SunStone	160
TBC	SunStone	160
TBC	Hurtigruten	530
Le Commandant Charcot	Ponant	270
Hanseatic Spirit	Hapag-Lloyd	230
TBC	Seabourne	264
TBC	Crystal	200
TBC	Hapag-Lloyd	230
TBC	Lindblad Expeditions	126

Source: Cruise Industry News: 2018 Expedition Market Report, Acorn

Ascension Island could benefit considerably from this growth in expedition vessels, mainly as they reposition between the Arctic and Antarctic regions. As Brazil and West Africa are not popular/safe destinations amongst cruisers, there is increasing interest in destinations along the mid-Atlantic ridge, such as Cape Town – Tristan da Cunha – St. Helena – Ascension Island – Cape Verde. These destinations also fulfil increasing desire of cruise passengers looking for remoteness, exclusivity, luxury and a ‘wow-factor’.

Several cruise operators are expressing interest to include Ascension in their itineraries as they move into, or develop cruises in, the rapidly expanding expedition sector. These include:

- Viking Cruises are set to become new entrants to the expedition cruising market in Antarctica with plans to build new vessels over the next five years, and report a desire to visit Ascension Island on a Lisbon (Portugal) to Rio (Brazil) route.
- Silversea are keen to include Ascension in a Namibia – St Helena – Ascension – Rio cruise.
- Hurtigruten are looking to include Ascension Island in their cruises for the first time, and are currently planning for the 2021-2022 season which they would be interested in stopping at Ascension.

Landing passengers on Ascension is not guaranteed due to often rough seas and inadequate harbour facilities. Timing of cruise visits is, to a large extent, difficult to influence as most cruise vessels stop en route between repositioning from Polar Regions (approximately April and September). Weather uncertainties do not appear to be a limiting factor for cruise companies however (Acorn, personal communications with cruise ship operators).

7. RECOMMENDATIONS

7.1 Introduction

The recommendations included in this chapter are based on three key assumptions:

- They will be put in place in preparation for, or on the resumption of the Airbridge link between the UK and the Falkland Islands.
- There is a desire within AIG to develop tourism to generate revenue for the AIG Island budget.
- That there is political will and suitable legislation in place to facilitate tourism operations on Ascension Island.

7.2 Reinstatement of a Dedicated Tourism Position within AIG

To rebuild its tourism sector effectively, AIG will need to update its old strategies and reinstate the post of Tourism Officer to implement them. It is recommended that this position should not be within the Ascension Island Conservation Department as it needs a certain level of autonomy - essentially it needs to challenge and be challenged by Conservation.

The roles of the reinstated Tourism Officer position should include:

- Oversee the lease of accommodation on the Island to a private operator (or operators) if this is feasible within existing legislation or new legislation is put in place.
- Quality control of accommodation – ensure standards are met and refurbishment is maintained at the level agreed with the operator(s).
- Issue operating licences to businesses providing goods/ services to tourists such as car rental and guiding services and, once the inshore management plan is in place, for game fishing and scuba diving.
- Engage with specialist operators, in particular in the UK, St Helena, Falkland Islands and South Africa, to encourage interest in Ascension, especially for fishing and scuba diving. Provide information to assist them develop inbound tours (connect them with local operators, provide information on flights, immigration, etc.). The potential market for Ascension Island is too small for it to be necessary to undertake any consumer marketing – demand should be driven by tour operators interested in selling trips to Ascension.
- Despite there not being a requirement to undertake direct consumer marketing, an attractive and informative website should be developed and maintained for interested visitors and tour operators/other businesses interested in Ascension Island. This should be used to generate interest and awareness in the destination. It can be used effectively to generate interest in particular for special events (such as eclipses, historical anniversaries, and specific niches such as dark skies tourism).

- Encourage cruise tourism through active promotion of the destination with cruise operators, encouraging visits and ensuring all arrivals are well received.
- Ensure that revenues from cruise visitors are maximised through the provision of shore excursions over the period of each cruise ship visit. Additional revenues should feedback to AIG through taxation.
- Maintain awareness for opportunities to develop tourism as and when appropriate, such as through the introduction of new niches such as SAVE tourism.
- Track tourism by keeping a simple but effective database of statistics, including visitor arrivals, point of origin, nights spent on the Island, expenditure, accommodation occupancy, and other services used (car hire, tours sold, etc.).

It is envisaged that this role could be funded by the revenues generated from tourism in Ascension, although initial seed funding for a period of three years should be budgeted for.

7.3 Game fishing and Scuba Tourism

Game fishing and scuba diving tourism will remain the key drivers for tourism in Ascension, and should be the main focus of the development of the sector, along with cruise visitors (see Section 7.4 below). Demand for both these activities, but in particular game fishing, is expected to challenge the supply of Airbridge seats and accommodation on the Island.

Game fishing is the most obvious segment to re-engage with, with several tour operators keen to put Ascension Island back in their brochures. The UK is expected to generate most fishing tourists, although there is also strong interest from European markets. The following operators have shown continued interest in Ascension Island during the research:

- SFC Travel: Hove, United Kingdom
- Five Star Travel, Liverpool, United Kingdom
- Sportquest, Norwich, United Kingdom
- Go Fishing Worldwide, London, United Kingdom
- Extreme Bluewater Spearfishing, Zanzibar, Tanzania

7.4 Cruise Visitors

Whilst cruise ship calls will always remain small due to Ascension's geographical position, there is potential for growth, to at least 4 to 6 calls per year. Ascension's market is predominantly the expedition cruises, and it is important to engage with this growing group of cruise operators.

Ensuring a sound presence in the market, in particular to raise awareness with new cruise operators, is essential. As the expedition market rapidly grows it is important to ensure Ascension Island is considered by all operators, and consequently, it would be useful to have a *Destination Cruise Manual* for this purpose, which would typically include:

- Information about the destination
- Immigration, landing and harbour fees
- Tours and activities available, including prices
- Key points of interest
- Pictures, in particular of tours and points of interest

Whilst it is arguably not cost-effective to attend events such as Seatrade Cruise Global (in Miami), maintaining regular contact with each operator is recommended as interest in Ascension as part of Atlantic-based cruises will grow.

7.5 Potential Niches

7.5.1 Atlantic Island Tours

The development of tours linking Ascension Island with the Falklands has considerable potential. Both destinations offer a product that appeals to a similar market: bird watchers and those interested in the natural environment. Linking up with the Falkland Islands Tourist Board to promote twin-centre holidays (typically stopping in Ascension for 3-7 days on a southbound or northbound flight between the UK and the Falklands) is likely to generate interest amongst tour operators, as well as independent travellers.

Whilst an expensive add-on (due to having to travel via South Africa), if timed well St. Helena could be included in a Brize Norton – Falklands – Ascension - St. Helena - Cape Town tour, creating an attractive *Islands of the South Atlantic* trip.

The ultimate tour could also include Tristan da Cunha, which could be included on an intriguing and enticing Brize Norton – Falklands – Ascension - St. Helena - Cape Town – Tristan - Cape Town - London Heathrow loop. This is surely something to challenge tour operators and independent travellers alike, who have the time and money to spend in remote unexplored destinations.

7.5.2 Ecotourism

Ascension Island's other products are arguably best grouped to appeal to the ecotourism/natural environment special interest market. This provides the strongest marketing angle for enticing visitors to the Island. Combined, the bird life, turtles (when in season), geology, flora and historical sites combine to make an interesting package.

These tourists, typically British, 55+ years old, in the AB socio-demographic groups, have the time and money to spend on unusual travel destinations, and are forgiving with regards to the quality of accommodation (as long as it is clean and comfortable). They tend to be active, and would therefore engage with the Letter Box walks and, if the conditions were right, would enjoy dark skies tourism. Overall, there is enough to do on Ascension to comfortably package a seven-day trip for this market.

It should, however be noted that some niche markets could be able to thrive, in small numbers of visitors, in their own right. There is, for example, potential to attract visitors who are purely interested in the geology of Ascension, as there will also be those whose sole purpose of visit will be to explore the plants, marine life, or historical aspects. As AIG develops its tourism strategy, it should consider each of these niches and investigate what might be put in place to make Ascension Island more appealing to these markets. For example attaining *Geopark Status* could make it a more attractive location for geo (geology-focussed) tourism, and *Dark Skies Status* for astronomy-based niches.

7.6 Costs and Benefits of Developing Tourism

Although the required information and data to build a model that could predict AIG Government revenues generated by tourism was not available for this report, it is possible to identify the sources of income, and the associated costs, as shown in Table 7.1 below. Note that without a detailed understanding of taxation and other levies applied to businesses and individuals on Ascension, some of the below may not apply. It is understood that past private enterprises, particularly within the sport fishing sector, were given tax-breaks to operate on Ascension Island. AIG should consider establishing a suitable taxation structure to ensure tourism income is retained on island which will enable reinvestment in the industry and beyond.

Table 7.1 AIG Government Revenues and Expenditures on Tourism

AIG Government Revenues from Tourism	AIG Expenditure to Develop the Sector
Lease of accommodation facilities	Salary of Tourism Officer
Taxation on tourism businesses (fishing operators, dive operators, food and beverage establishments, shops)	Operational budget of Tourism Officer: <ul style="list-style-type: none"> • Travel • Communication • Office costs • Marketing materials (including website and social media)
Immigration fees from air arrivals	
Cruise ship berthing (and associated) fees	
Cruise ship passenger tax	
Income tax on individuals providing goods and services to tourists.	

It is the opinion of the Consultant that if a small but well-organised tourism sector is developed on Ascension, it could generate a net positive income into the annual AIG Government budget.