Guernsey Tourism Partnership March 2023

The ISLANDS of

The ISLANDS of GUERNSEY

Latest news

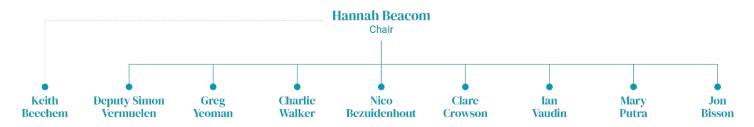
- Tourism Management Board now in place
- Smarter collaborative working more intelligent co-funding partnerships with carriers and tour operators
- **Continued strategic direction** market to smaller niche audiences, alongside our three key target audiences. Extend into the shoulder months.
- **Travelling from France** day trippers on commercial routes can travel by French ID Card (aiming to be in place no later than the end of April)
- New partnerships with established brands Expedia and Tripadvisor
- New consumer marketing approach in France and Jersey new PR representation in France / consumer marketing in both destinations



Tourism Management Board structure

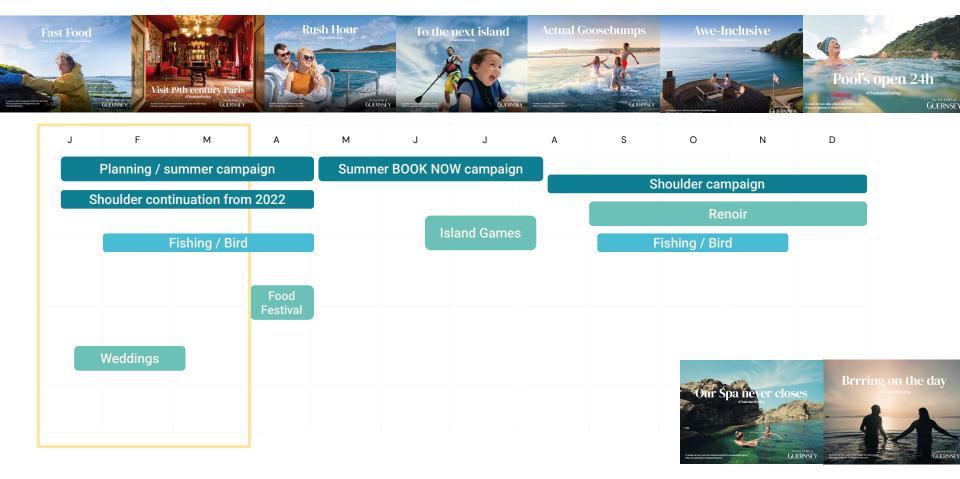


Tourism Management Board



2023 campaign & comms plan

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2023 campaign & comms plan

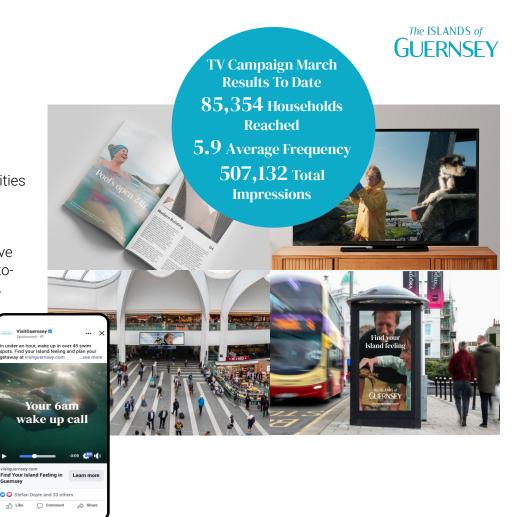
- General awareness TV, OOH, Print, Digital
- Niche to mainstream Wellness
- Media schedule
 - 2 month bursts of TV on Sky Adsmart 0
 - 2 week high impact UK OOH campaign across 3 cities 0 and 150 sites
 - Dedicated France OOH campaign 0
 - 30+ different print publications throughout 2023 0
- VisitGuernsey Trade & Media offers a free-to-use, extensive library of official images and video, you can also keep up-todate with the latest news, strategy and campaign activity. guernseytrademedia.com



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Shift in our audience focus

Focusing on a more affluent audience, mainly 35 - 65+ couples, who over index on location +6% South West, +4% South East +4% East of England. An audience that are less price conscious in a cost of living crisis.



Our heartland visitor. Affluent and older, many are regular visitors to the Islands and they hold a special place in their hearts. They are looking for a safe and familiar environment that is close to home.

Interests: Food & Drink, Natural Beauty (Cliffs, Walking), Heritage

Multigeneration & families Experian Mosaic: Domestic success

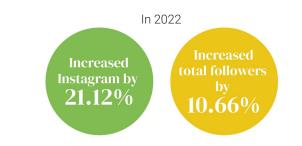
Families looking to reconnect. This group will be motivated by a broad variety of accommodation options in a safe environment with a host of family & friends activities catering for all ages.

Interests: Food & Drink, Beaches, Island Hopping

Millennials with no children

Experian Mosaic: City Prosperity A new younger audience - looking for experiences together. Looking for escapism and Instagram moments.

Interests: Food & Drink, Activities, Beaches, Island Hopping, Wellness



With an increased focus on social and the introduction of daily posting, we have significantly grown our channels and increased web traffic from social.

Experian

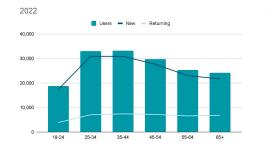
A world of insight

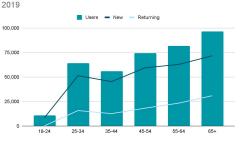
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Through ambassadors and truly 'instagrammable' content suited to our younger audience, we have achieved record levels of reach.

On visitguernsey.com, in 2022 our biggest segment was 35-44. In 2019 our biggest segment was 65+





Research



"The top destination type for an overnight domestic trip up to May 2023 is countryside or village. From June to September 2023 it is traditional coastal/seaside town."

The top 5 reasons for UK preference:



- 1. UK holidays are easier to plan (56%)
- 2. UK holidays are cheaper (49%)
- 3. Shorter / quicker travel (39%)
- 4. To avoid long queues at airport/cancelled flights (31%)
- 5. I want to take holidays in places I am familiar with (30%)

The top 5 reasons for Overseas preference:

- 1. Better weather (45%)
- 2. I want to visit new places (41%)
- 3. I want to explore other cultures (35%)
- 4. I'm prioritising overseas trips after missing out during the pandemic (25%)
- 5. Overseas holidays are cheaper (23%)

https://www.visitbritain.org/sites/default/files/vb-corporate/Domestic_Research/domestic_sentiment_tracker_report_- march_2023_release.pdf

"Familiar places - In 2023, the most likely months for a staycation in the UK are June (14%), August (13%) or July (13%).

JPA

Nearly twice as many women like to spend their August in the UK than men, and it's the most popular holiday month for 45-54 years olds."

Early trade insight

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Channel Islands Direct

"GuernseyTravel.com are reporting bookings are ahead in both passengers and revenue on both 2022 and 2019, with 3/4 of bookings comprising flight and accommodation. 4 Star hotels have seen the biggest increase in share of accommodation."

- Channel Islands Travel Group on forward bookings

premierholidays

"Guernsey bookings are strong for Q2, with peaks in May & June. September has seen an increase in bookings so much so that it has overtook May as second biggest travel month booked.

Guernsey business is up compared to the same period in 2018, with strong bookings during the shoulder seasons."



"Condor has reported positive news with its car passenger bookings ahead of the comparative period in 2019 on all its routes.

Foot passenger bookings remain a challenge, particularly from France, with bookings at lower levels than four years' ago due to the passport issues.

The Condor Breaks' tour business, established in 2021, is seeing a real surge in interest for combined hotel and ferry bookings. "

- Condor on UK forward bookings

- Premier Holidays on 2023 season

Cruise development - stats

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The Bailiwick of Guernsey was named 2022 "Best UK & British Isles Port of Call" at the Cruise Critic industry awards. Last year 88% of passengers chose to come ashore which is much higher than the industry average of 60-70%.

2023 Cruise Visits

95 scheduled

 $12 \; / \; 95$ will be first-time visits

Operating at full capacity after having sailed with reduced passenger numbers due to covid restrictions

2022 Cruise Visits

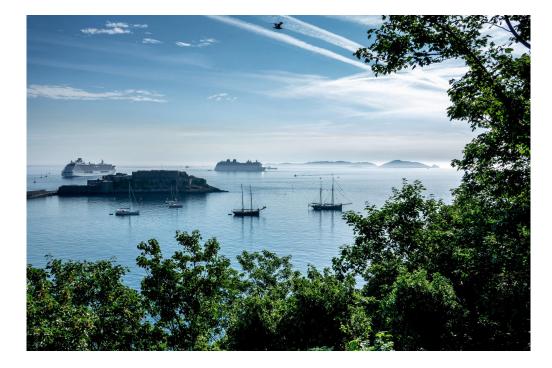
 $\mathbf{86}$ in total

 $130 \ \text{scheduled}$

 $44 \; {\rm cancelled}$

2019 Cruise Visits and Spend

115,085 Total Disembarking Cruise Passengers£34 Average Spend Per Disembarking Passenger£3.9m Total Spend



Cruise development

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Emerging trends – upcoming consumer goals*

- Wellness and self care
- Forming stronger connections with family and friends
- Living a healthier lifestyle
- Focus on sustainability

Challenges

- Tender destination (poor weather/lack of tender facilities on cruise ships)
- Availability of shoreside power
- Brexit and the selling of duty free

*Forbes report on 2023 cruise trends.

Actions - what else are we doing?

- Target lines operating smaller ships with more affluent passengers
- Focus on the **quality** of these visitors, not the quantity
- Adapt our product to a changing market
 - Luxury cruise ships under 1,000 guests offering a 5/6 star product
- **Cruise Industry News** as reported that this year approx. half of **2023**'s new **cruise ships are smaller**
 - Luxury ships, ranging from 100 passengers (yacht-like vessel Emerald) to 930 passengers (Viking)
- How can we work together?
- What can we offer these passengers?
- How can we showcase our islands to a smaller, niche market?
 - Alter/expand our excursion options

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Working together - partnership packages deliver results

Advertise with VisitGuernsey. All trade partners are entitled to a bronze package, free of charge, but there are opportunities to make the most of our connections, to improve yours, whatever your budget. These include:

- Listings on visitguernsey.com
- Special offer listings
- Advertising in new brochures
- Social media features
- Special offers includers in consumer mailers
- Featured listings on visitguernsey.com
- Bespoke content partnerships





Bespoke content partnership with The Fermain Valley Hotel delivered:

- Dedicated mailer to VisitGuernsey database (55,000+) opened by 11,841 people (21.27%) resulting in 224 direct referrals
- 105 link clicks and 8,178 organic impressions on Facebook



Big ticket opportunities this year - Island Games



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Up to 3,000 competitors, officials and spectators will be in Guernsey from 8th - 14th July.

What we are doing?

- Branding and creative at both the three main locations and supporting locations
- Highlighting events and activities to do while they are here
- Tailored sporting guide encouraging visitors back

How you can capitalise?

- How can you best promote your activity/service to this audience?
- Can you offer any promotions or deals?

How can we help?

Big ticket opportunities this year - Renoir 23

The ISLANDS of GUERNSEY

We are working together with Art for Guernsey to promote Renoir 23.

What we are doing?

- Supporting with off island promotion
- Hosting London and Guernsey based events with National journalists

How you can capitalise?

- How can you connect your business to this audience?
- What is your shoulder month offering?
- Can you link up with other providers to deliver any value added offers?

How can we help you make the most of this opportunity?



Guernsey Trade Workshop



VisitGuernsey and VisitJersey are working together on the Guernsey Trade Workshop and Destination Jersey events which will be held this October.

This event will provide excellent networking and business development opportunities with the Islands of Guernsey tourism industry and off-island UK and European delegates.

The Guernsey Trade Workshop will take place from 11-13th October

Wednesday 11th October - Guernsey welcome evening reception (afternoon travel to Guernsey for those attending Destination Jersey)

Thursday 12th October - Business day

Friday 13th October - Familiarisation activities

