

TOURISM
MANAGEMENT BOARD

Role of the Board

- To develop a Tourism Strategy for Guernsey
- Set future aspirations of the Bailiwick as a Visitor Destination
 - Incorporating strategic work on sea and air routes
 - Incorporating product development
 - Incorporating work on accommodation stock
- Bring together stakeholders, commercial and political
- Work closely with VisitGuernsey on their Marketing Strategy
- Manage the Events and Activities Budget

Our aims

- A strong and identifiable organisation dedicated to tourism
- A shared vision for the development, promotion and growth of the Bailiwick's tourism
- To work collaboratively and constructively

Meet the team

- Hannah Beacom – Chair
- Nico Bezuidenhout – Carrier
- Greg Yeoman – Carrier
- Clare Crowson – Travel Agents
- Ian Vaudin – On island transportation
- Charlie Walker – Accommodation
- Vacant – Events
- Keith Beecham – Consultant

Meet the team

- Deputy Simon Vermeulen – Committee for Economic Development, Tourism lead
- Mary Putra, MBE – Director of Communications

Value to the Economy

From the Visitor Spend Survey 2019/2020

- £139 million
- Average spend (excluding day trippers/cruise liner pax) £511 per visitor
- Higher for arrivals by air
- German visitors - £785 average
- Dutch visitors - £729 average

Challenges

- We have taken this year to fully understand the challenges our industry is facing:
 - Post Covid
 - Staycation trend has encouraged travellers to explore closer to home
 - Increase in trips to visit family and friends
 - Post Brexit
 - passports required for European visitors
 - Recruitment even more challenging
 - Shorter booking patterns
 - Harder for businesses to plan for staff and other resources

Challenges

- Business travel
 - 29% down.
 - Due to change of working patterns, this may never bounce back to pre-Covid levels
- Cruise Liners
 - Tender port. Weather dependent. New ships in build without tenders
 - Princess Liners will not be visiting next year
 - Strategically new marketing has been to smaller, high rates lines. Niche lines

Where are we currently?

- Visitors by air – recovery at 74% of pre-Covid levels
- Visitors by ferry – recovery at 85% of pre-Covid levels
- Visitors by cruise ships and yachts – recovery at 54% of pre-Covid levels
 - May arrivals in particular were hit by bad weather
 - 82.2% of arriving passengers disembark.

Visitor Accommodation

2019 vs 2022 vs 2023

	2019	2022	2023
January	19	21	28
February	28	34	35
March	31	*	39
April	47	*	56
May	62	64	67
June	76	70	81
July	75	77	81
August	75	76	75
September	73	71	79
October	50	48	
November	31	33	
December	26	34	
		* There was a wave of cases of the Omicron variant of COVID-19, which impacted on the ability to collect full data in March & April 2022	Italic numbers are provisional figures

Why is bed occupancy ahead of arrivals ?

- The average length of stay has increased from to 4.7 nights (Q2 2023) from 4.4 (Q2 2019)
- 5,019 beds available in 2023. 5,055 in 2019. 201 beds at hotels closed for refurbishment. Bed stock is broadly in line.
- Opening of Premier Inn (100-bed)
- La Grande Mare in rebuild (15 self-catering lodges) and Bella Luce (14 rooms) in refurbishment

Wider Benefits

- Vibrancy of our community
- Helps make the islands of Guernsey a better place to live, work, play, do business in and with
- Connectivity for local residents
- Wider cultural, heritage, events and sports
- Helps with social inclusion – tourism jobs across all salary levels for all ages

Connectivity

- Aurigny – new routes
 - London City (daily)
 - Liverpool (3 flights a week)
 - Stansted (3 flights a week)
 - Newquay (Summer holidays only)
 - Edinburgh (weekly)
 - Paris (twice a week)

Connectivity

- Condor

- Car passengers UK – Guernsey are up 7% on 2019 levels
- Car passengers France – Guernsey are up 18% on 2019 levels. Joint marketing campaigns in France with VisitGuernsey
- Cherbourg route opens up potential for passengers travelling through Normandy – also options for 2 centre holidays and/or WWII experiences
- Foot passengers have not recovered. Pilot scheme this summer allowed French day-Trippers to travel on ID cards. Scheme now extended to Sept 2024
- Introduction of Condor Islander will bring more resilience to the timetable
- Mixed sizes of cabins should lead to higher occupancy
- Pet friendly cabins

VisitGuernsey Marketing Strategy 2024

- We have good data on why people come to Guernsey and their demographics
- Strategy is focussed around our air and sea links
- Drivers to the VisitGuernsey site are:
 - Beachbound travellers
 - Family holidayers
 - Luxury travellers
- Our visitors are targeting Guernsey for:
 - Natural beauty and beaches
 - History and heritage
 - Climate

VisitGuernsey Marketing Plan 2024

Identified opportunities for growth

- Rise in demand for acti-holidays for families, teenagers and solo travellers
- Demand from more affluent campervan travellers and those seeking glamping opportunities
- Transformation travel – wellness retreats, fitness camps, exploring ‘volunteering’ holidays
- Leverage of 2023 successes e.g. Renoir

VisitGuernsey Marketing Plan 2024

Identified opportunities for growth

- Sustainability - food miles, bio-fuel, recycled produce etc
- Buying local/food provenance – spike in food related searches for ‘traditional’ or ‘authentic’. Guernsey logo to advocate and encourage the promotion of locally made or locally sources produce
- Quirky, no-compromise experiences – unique and bespoke activities more authentic to Guernsey, alongside unique/quirky places to stay

VisitGuernsey Marketing Plan 2024

Identified opportunities for growth

- 2023 active promotion into Jersey
- French routes
 - 80th anniversary of D-Day landings 2024
 - Renoir & Victor Hugo

Creative updates

- Production for 2024/25 includes
 - History with a family focus
 - French ambassador
 - Food and food provenance
 - Heritage 80

How to grow the sector

- Ensure sustainable tourism, protecting our natural and cultural resources
- Collaborate to ensure that the tourism products and services align with the wants and needs of our target audience
- Safeguard our existing bed stock
- Ensure a rich visitor experience and by doing so encourage longer stays and higher spend per visit
- Extend the season to ensure best use of existing tourism assets

How to grow the sector

- Recognise the importance of events-led tourism and exploit opportunities ensuring collaboration between event organisers, agents and carriers; and with VisitGuernsey so no marketing and sales opportunity is lost
- Work with the Guernsey Sports Commission and its members to ensure targeted marketing to visiting supporters
- To promote the importance of tourism to the local economy and ensure a positive story is told about current wins and future potential

Any questions ?