

A Framework for the Visitor Economy

Celebrating our island spirit
and building a sustainable
future for tourism

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Foreword from Deputy Vermeulen

Guernsey's tourism industry is integral to our island. Our rich and diverse culture, heritage and natural beauty provide an attractive proposition for visitors. Following global turbulence and factors beyond our control it is time to reset and maximise our opportunity in the tourism sector. How we do this will strengthen our existing proposition of making Guernsey a sustainable destination of choice and pave the way for future generations.

The creation of the Tourism Management Board (TMB) providing oversight bridges the gap between the States of Guernsey and the tourism sector, working in partnership to ensure that the interests of this vital part of our economy are championed.

This new framework reminds us how lucky we are to have the tourism offering that we do, how important the Visitor Economy is to our Bailiwick and what we need to do together to cement tourism as a thriving industry for the future.

Competition is fierce and increasingly destinations are investing in their tourism offering, finding new and innovative ways to make themselves sustainable for the future. Now is the time for the States and private sector to come together to do the same for the Bailiwick and ensure we are diversifying our economic future by including tourism in our own investment.



1. Introduction

There is nothing that makes a Bailiwick resident more passionate than their island home. It's akin to a family relationship. We like to complain about the small things but ultimately, we swell with pride when discussing what we love about our islands, 'between the UK and France' with unofficial Guernsey ambassadors drawing pictures on napkins all over the world to describe our location.

And despite fierce competition from other destinations the world over, the charm of our islands is felt by the visitors who seek us out with 62% of those visitors having previously visited Guernsey. Once persuaded, our visitors find we are worth discovering and we can be an unforgettable holiday experience.

It is this fierce pride that we look to harness in this framework and our unique 'Guernseyiness' that we will aim to nurture. It is reflected throughout this document, in the sentiment of collaboration, the approach to sustainability and the introduction to initiatives like the Guernsey Mark and the Ambassador scheme, the product development and the events that we are choosing to support.



The Tourism Management Board was created to bring tourism industry stakeholders together to represent all corners of this sector. During 2023 we took the time to understand the challenges that Guernsey is facing and to talk to a wide range of stakeholders so that we can set out strategic solutions for Tourism growth that we believe are achievable.

The Bailiwick of Guernsey provides a unique tourism experience with an abundance of natural beauty, stunning coastlines and a rich heritage.

In their 2017 report, PwC noted that without a standout attractor, individual products do not drive tourism; rather it is the overall guest experience and 'journey' that is critical, encompassing numerous elements to make for a high quality and fulfilling holiday/destination.

With a clear brand, and selective development, Guernsey can start to differentiate itself and become a core UK and European short break destination. With this framework we will meet our visitors' expectations of an excellent visitor experience.



Focus on value to the economy



Focus on collaboration



Developing product



Focus on sustainability

Collaboration is Key

We have a firm ethos of working in partnership and recognise that the landscape for tourism has changed as a result of Covid-19, Brexit, advances in technology and changes in consumer behaviour which is reflected in the expectations of today's traveller. We understand that in order for the Bailiwick to be competitive then the islands must understand and appreciate the value that the visitor brings. Sustainable tourism can bring economic, social and cultural benefits to our islands.

We will work collaboratively, bringing government, industry and the wider community together to deliver our vision through a set of measurable commitments.

Important enablers include:



Transportation to and on the island



Accommodation options and quality



Marketing



The island experience, including things to do, attractions and events



The other islands of the Bailiwick which make an experience different from other destinations

This tourism framework aims to set out our strategic aims. It doesn't cover the current annual marketing strategy which you can find at [guernseytrademedia.com](https://www.guernseytrademedia.com)

2. The Value of Tourism

Why does the visitor economy matter to Guernsey?

In addition to the fiscal benefits and contribution to our overall economy, the visitor economy helps make Guernsey a better place to live, work and do business. It supports our external and internal travel links and the development of ‘product’ from which our community benefits, whether that be our bars and restaurants, sporting, cultural and arts events or heritage and culture. Tourism is a global, fiercely competitive export industry and it is one of Guernsey’s few indigenous industries. It is important that collectively we understand its current value and potential.

*This is an uprated figure based on the 2019/20 Guernsey Visitor Spend Survey Report, and uprated using the Guernsey RPI

** Cruisers spend an average of \$759 USD (£593, March 2024) per passenger in port cities over the course of a typical seven-day cruise, equating to £84 per day. Data collected from the ‘2023 State of the Cruise Industry Report’ – Cruise Lines International Association

2023 Visitor Survey analysis shows that the spend of visiting parties was distributed as follows:

32% £1,500 or more

25% £1,000 to £1,499

17% £750 to £999

14% £500 to £749

10% £250 to £499

3% Less than £250

Average spend per plane and ferry visitor

£511 in 2019/20 ► £603 in 2023*

£84 Average spend per cruise visitor per day**



2023 Visitor Statistics



563,879

Total number of departing passengers

▲ 9.8% increase from 2022

▼ 18.9% decrease from 2019



59%

Travelled
by plane



23%

Travelled
by ferry



18%

Travelled
by cruise
or yacht



61%

of all visitors stayed in hotels
(108,667 people)

Country of residence



48% UK



5% France



6% Jersey



9% ROW



32% Unknown*

*these visitors arrived via
cruise ships or yachts.

62%

of all visitors had
visited Guernsey
before.

3%

of those had
visited on a cruise

Length of stay in 2023



4.2
Nights

Average length of
stay for hotel guests
(452,101 bed nights)



5.9
Nights

Average length in
other accommodation
(149,189 bed nights)

Average length of stay for visitors staying
in all accommodation,

4.7 Nights

in 2019

► 4.9 Nights

in 2023

108,971

visitors reported
the main purpose
of their trip to
Guernsey was
for leisure



Capacity to
accommodate

5,399

people in summer

Booking patterns

(prior to
travel)

14% more than 6 months

26% 4 - 6 months

41% 1 - 3 months

10% 14 days - 1 month

5% 7 - 14 days

4% less than 7 days

0% on arrival in Guernsey

2023 Accommodation occupancy

Jan

28%

Feb

35%

Mar

39%

Apr

56%

May

67%

Jun

81%

Jul

82%

Aug

75%

Sep

73%

Oct

52%

Nov

40%

Dec

38%

3. Current Challenges

Post Covid 2022 – 2023 has been a challenge for tourism destinations the world over and the impacts will likely be felt for several years to come. Guernsey's traditional older market were left more nervous to travel and with less money in their pocket.

We face a cost-of-living crisis in our primary markets where consumers need more reasons than ever before to part with their hard-earned cash and destinations are fighting for their slice of the market.

Add to this the impact of Brexit on our European visitors, travellers in our secondary market of France now requiring a passport to travel with large proportions only having an ID card, we have felt this impact on our French visitor market despite the best efforts of Home Affairs to support the day trip market with concessions.

Covid saw large numbers of hospitality staff leave Guernsey and remain at home and when added to the impact of Brexit this has meant that the sector has had to source staff from further afield. The Committee for Economic Development have worked together with Industry and Officers of Home Affairs to ensure that this challenging recruitment landscape is in ongoing review to alleviate this pressure. Staffing across the islands remain challenging with housing being at a premium in terms of both cost and availability.

Retaining our visitor bedstock

Housing costs have inevitably made it attractive for sections of the accommodation sector to consider applications for change of use enabling them to release units for sale on the local market. The current visitor accommodation capacity for Guernsey is 5,019; this is those providers with an active boarding permit. At present, available visitor accommodation in Guernsey is 4,818 people. Capacity for 201 people is currently unavailable due to refurbishment. In addition, 320 more visitors can be accommodated in Guernsey during the summer season, via glamping and camping, which takes the total capacity up to 5,339.

Any further erosion of our accommodation will begin to have far reaching impacts on the viability of tourism and that in turn has an impact on our air and sea links.

Booking trends

During 2023, short term booking patterns, seen since post-Covid, remained, with the majority, 41%, booking their trip 1-3 months prior to travel (there was a slight increase, up from 10% to 14% over the course of the year, in those booking more than six months prior to travel).

VisitBritain data from February 2024 shows that is still the case and of those booking domestic trips, only 37% had made a booking for April, a further 35% had decided where they wanted to go but not booked and 25% were still to decide where they wanted to go.

Route development

We are pleased to see the work of route development result in new routes for 2024 beginning with a twice weekly Paris route launching at the end of March 2024. In addition, five other UK routes, London City, Newquay, Edinburgh, Stansted and Liverpool, are due to launch in 2024 along with direct flights to 10 European destinations being added to the summer schedule, including new routes to Biarritz in France and La Coruna in Spain.

In 2022, in line with the objectives of the Air Policy Framework 2021-26, three strategic priorities were identified by the Committee for Economic Development for air route development.

- Development of a second international hub to complement what is already available through Gatwick Airport
- Development of greater connectivity opportunities with European destinations, including regional hubs
- Consideration for further development of UK regional services, but only in areas not already served from Guernsey

Route development consultants Airport Strategy and Marketing (ASM), the world's leading route development company, were then commissioned to undertake a strategic market analysis, completed in December 2022. The analysis and engagement were instrumental in the development of new services to Paris Charles de Gaulle and Edinburgh. Working with the carriers to ensure both route coverage in our target areas, but also schedules that mean the best possible availability and options for our customers, remains both a challenge and a priority.

Government funding

Guernsey faces its own economic issues with public sector budgets reduced and the private sector having less available funds to invest in their own product development and marketing. We appreciate that when faced with tough decisions about health, care and education the ability for the States to support the visitor economy in the same way and to the same magnitude that it has done previously may be difficult.

However, we strongly believe in the importance of the industry for Guernsey's growth and implore the current Committee for Economic Development and future Committees to lobby to safeguard and increase funding and avoid any further reduction in budget.

With the potential of General Revenue raised through the proposed introduction of a visitor tax there has never been a better time for the States to invest in the visitor economy and ensure that accommodation occupancy and visitor spend reaches its maximum potential.

Changes to the cruise ship market

The cruise ship market has been slow to recover locally. Currently, there are 87 cruise liners scheduled to visit the islands during the 2024 season. Challenges include Brexit, fuel efficiency savings, a move to more cost-effective destinations, poor weather affecting itineraries and a move away from tender-only ports. We are working proactively with the Committee for Economic Development and Guernsey Ports to safeguard this important industry.

4. Key Strategic Aims

Where do we want to go and how are we going to get there?

For decades tourism success in Guernsey has been predominantly measured by a single statistic – arrival numbers. There are, however, several ways to measure success and a balance to be achieved between the numbers visiting our shores, the impact on the experience for visitors and locals alike and the ability to sustain this important local industry for the future.

We have both short and long terms aims. We need to realise the potential of the visitor economy within current parameters whilst championing and supporting growth of tourism within the islands to ensure and safeguard a sustainable tourism industry for years to come.



Continue to improve data so that we truly understand our value to the economy.



Prioritise extending the season.



Encourage private sector understanding of the tourism framework to ensure experience meets the expectations of the target audience and we maximise spend.



Support political understanding of the value of tourism and champion investment.



Protect and maintain bedstock levels and invest to improve the quality of existing stock.



Protect and maintain air and sea links.



What does success look like?

The TMB considers it most important to measure our success primarily by demonstrating our value to the economy. It is this that will evidence the necessity for the States of Guernsey to continue to support this vital industry. In order to do this we must be able to really understand the data we have access to, fill in the gaps in our knowledge and focus our collective efforts in the right places.

We will measure success in the following ways:



Reliability of air and sea routes



Protecting and maintaining optimum bedstock levels, whilst maintaining or enhancing the quality of the accommodation



Stable and growing occupancy levels



Maintaining and increasing length of stay



Increase the average visitor spend without impacting on value for money



Growing occupancy in the shoulder months



Success of product development grant projects



Success of events grant projects



Increased engagement and contribution from Industry



Maintaining high level of customer satisfaction as indicated by net promoter scores

5. Short Term Aims and Actions 2024-2025

Despite the worldwide challenges, there have been some opportunities. Travellers have gravitated towards short haul trips, making Guernsey convenient for the UK and French markets.

We believe that the most efficient strategy for growth will be to align, as far as is practical, public sector and private sector funded promotional activity with the development of product. This will ensure the best possible visitor experience, delivered by working collaboratively across the Bailiwick and evidenced by robust data.

For the coming two years realising our potential means working within the economic parameters that we have. Our aim is to sustain and develop an excellent product that is well promoted to stimulate demand.

Investment will follow if we exploit the growth opportunities that are available to us now. There are green shoots within our industry, even after a challenging couple of years. We know that there are many within our wide-ranging tourism product offering who see opportunity with interesting and exciting initiatives applying for funding across events and product who are also investing their time, energy and financial resources. It is incumbent upon us to support those green shoots and the expertise and entrepreneurialism within our own community to that already provided through the Committee for Economic Development.

In this current economic climate, securing additional public funding, either to support marketing or to invest in product outside of what is already committed, in the short term is challenging. In addition, our local industry is telling us that in this post covid period they do not have the funds to contribute to the promotion of the visitor economy. For this reason we must seek our growth opportunities in other ways, while advocating for long term investment in the economy.



Our short term aims and actions therefore are to:



Encourage sustainable tourism, protecting our natural and cultural resources by working with both private and public sector.



Collaborate to ensure that the tourism products and services align with the wants and needs of our target audience.



Ensure that our air and sea links align with the needs of our target audience and that we are developing routes that align with the framework for both an incoming and outgoing audience.



Work collaboratively to ensure that our accommodation offering aligns with the needs of our target audience and safeguard the existing bed stock.



Ensure a rich visitor experience and by doing so encourage longer stays and a higher spend per visit.



Extend the season to increase revenue and visitor spend over 12 months.



Recognise the importance of events-led tourism and exploit opportunities ensuring collaboration between event organisers, agents and carriers; and VisitGuernsey so no marketing and sales opportunity is lost.



Work with the Sports Commission and its members to ensure targeted marketing to visiting supporters.



To promote the importance of tourism to the local economy in the local community and ensure that positive stories are told not only about future potential but current wins.

Action 1

Manage event funding to match these strategic aims. Annual funding is allocated based on a set of criteria.

Action 2

Manage product development funding to support those private enterprises that demonstrate they can match our strategic aims.

Action 3

Continue to work with industry representatives, bodies and stakeholders to encourage and promote an understanding of the short term and long term aims and promote the interests of the tourism sector.

6. Long Term Framework

Productivity



Lengthen the season



Encourage younger and multi-generational visitor groups



Increase length of stay



Increase average spend



Maximise opportunities



Collaborate



Improve skills across the sector

Competitiveness



Protect accommodation stock



Improve the product



Air and sea link connectivity must provide capacity and capability



Ensure our transport links are well-connected, reliable and value for money



Promote an excellent visitor experience



Improve inter-island connectivity

Stewardship



Invest in, and promote, Guernsey's unique heritage



Develop and promote Guernsey's arts & culture offering



Develop, promote and enable sports and other events



Consider other growth areas (e.g. visiting yachts)



Consider innovation projects to maximise visitor experience



Champion the use of local products, improving the visitor experience and ensuring minimal economic leakage



Underpinned by working together towards a sustainable tourism offering.

Working together towards a sustainable tourism offering

Globally sustainability is top of the agenda and the credibility of territories, businesses and organisations is under scrutiny more than ever.

As our natural environment is our greatest asset we must both maximise it and protect it. Ensuring our visitors are clear on our commitment to protect our natural environment is a key objective of this framework.

Sustainability helps both the public and private sectors by reducing overheads whilst simultaneously supporting both our economy and tourism positioning as a centre for sustainable excellence. Collaboration can facilitate commercial and environmental spend into the most worthwhile projects for the island. Utilising local suppliers and producers offers environmental benefits, reduces economic leakage, and improves the visitor experience.

Businesses can adapt to changing environments if support is given. In collaboration with other organisations, we will bring together information and guidance for how Guernsey businesses, event organisers and stakeholders in the world of arts and sports can make small changes that will make a big difference.

To demonstrate our commitment to sustainability we will:

- Launch an environmental charter and accreditation scheme for the visitor economy. This scheme will support the reduction of single use plastic (SUP), reduction in littering and reduction in energy usage.
- To ensure the success of these aims we will work with government and businesses to remove barriers to these sustainable ambitions.

Accommodation providers will be key in the execution of any sustainability strategy. Accommodation is the shop front and most consistent touch point with visitors, largely shaping their overall experience of the island. Serving local products not only gives a sense of integration into the local community but is economically and environmentally sustainable. Short- and long-term focus should be on retaining visitor spend on island via our supply chains for both economic and environmental reasons.

Product development and events

Increasing tourism, either by land or sea, will inevitably increase consumption and impact on the islands. Sustainable initiatives will not only encourage environmentally minded tourists but protect our natural beauty that drives visitors of all ages, going some way to mitigate this impact, albeit not remove it.

Encouraging businesses to mitigate their impact with local schemes will not only invest back into our island and product but is good environmental practice. Planting trees in another country to offset carbon emissions created on island, doesn't make Guernsey's air cleaner or support local biodiversity. Driving responsible impact mitigation practices locally has potential to not only maintain but result in net improvements in Guernsey's environmental experience and quality.





CASE STUDY



The Little Big Hotel Group and Guernsey Seaweed

The Little Big Hotel Group approached Guernsey Seaweed to reduce the amount of single use plastic bottles used for toiletries. Guernsey Seaweed developed a hand soap, shower gel, shampoo

and conditioner using local seaweed to produce all four products. Rather than small bottles, large dispensers were introduced into all bathrooms across the group and Guernsey Seaweed provided 5L refillable containers to 'top up' these dispensers. Once the 5L containers are empty, they're collected from the hotel and replaced with full ones.

This scheme entirely removed SUP waste from toiletries, estimated to be in the region of 42,500 a year whilst also reducing the hotels scope three emissions, toiletry spend and economic leakage for the island. Sustainable for the environment and the local economy.

Events can be environmentally damaging as they are often resource intensive to set up and breakdown. The use of SUP is prevalent in events and although non-plastic/plant-based alternatives are available they are often not used. From 2025 accrediting events that sign up to the Environmental Charter will help to encourage and educate organisers and stall holders on how to reduce their impact whilst improving the local availability and supply chain of alternatives to SUP.

The journey to becoming a sustainable business requires specific knowledge and/or training. Over the next 18 months the TMB will provide all local tourism businesses with guidance on short-, medium- and long-term changes they can make to reduce their environmental impact. These changes will dovetail into the TMB's environmental roadmap to a lower-impact and more sustainable tourism sector by 2050.

Key Actions

- 1 Launch an environmental charter and accreditation scheme for the visitor economy
- 2 Develop a Sustainability guide for the tourism sector with short, medium and long-term achievable aims
- 3 Develop a Tourism Environmental Roadmap to 2050
- 4 From 2025 all events receiving funding must sign up to the environmental charter and accreditation scheme and be compliant
- 5 Workshops to be held with event and hospitality contractors on sustainable initiatives and supply chain options

Productivity



Lengthen the Season

With limited bed stock there is an obvious route to growth, albeit a difficult one, and that is to extend the season. We have seen some success with this in our short-term strategy but to make this strategically viable there are some key actions:

- Work with Guernsey Sports Commission and Sports organisers on shoulder month sports tourism
- Work with Guernsey Arts Commission and Arts organisers to focus events out of season
- Encourage collaboration with both States and privately owned tourist attractions to provide longer opening hours
- Evidence the contribution into the economy of these sectors - add relevant questions on exit surveys
- Promote the Bailiwick as a year round destination



Continue to market to a younger demographic / multi-generational audience

Almost half of visitors during 2023 were aged 55 years and above (49%), 25% were aged between 35-54 years.

- Develop product offering to meet the needs of a younger demographic



Increase the length of stay

In 2023 length of stay for visitors staying at least one night but less than 31 nights was 4.9 nights in 2023 and compares with 4.7 nights in 2019.



Increase average spend per visit

- Easier bookable experiences online
- Upselling at every opportunity
- Ensure good communications between the trade so we are able to steer visitors to attractions



Maximise opportunities to cross market

- Market return holidays to all
- Encourage sport tourism visitors to extend their stays
- Encourage business travellers to remain on island for holiday activities
- Encourage cruise passengers to return for a longer stay



Provide a proactive, positive and collaborative approach

- Joint marketing campaigns with trade and carriers with a clear call to action
- Closer working with the other Channel Islands
- Encourage regular engagement with the trade



Improve tourism skillset

- Introduce the Guernsey Ambassador Scheme
- Improve and encourage use of technology across the sector



‘Renoir in Guernsey, 1883’ was identified as one of VisitGuernsey’s key PR opportunities for 2023.

Sat 30 Sept – Sun 15 Dec

Renoir in Guernsey, 1883’ was organised by Art for Guernsey, in collaboration with Guernsey Museums and the Giverny Museum, and VisitGuernsey were able to capitalise on this wonderful opportunity, primarily through the visiting journalists programme. In addition, VG arranged a number of Guernsey and London based events. Coverage, to date, has a PR value of £514,770 – the advertising value equivalent of £171,590.



150+

Journalists engaged with the project



33

Pieces of editorial and broadcast coverage



15,000

estimated number of visitors (10,572 tickets sold, 3,500 school children plus review nights)



29%

estimated off-island ticket sales



11

Journalists (UK/France) attended the exhibition

Collaborative working at its best

Working in partnership got the message about this event further.

The ‘Renoir in Guernsey, 1883’ exhibition offered us an opportunity that was in line with VisitGuernsey’s key strategic aims but also the longer term aims and ambitions of the Tourism Management Board

- Maintaining a younger and more affluent audience – the exhibition provides new and engaging product
- Extending the duration of the average trip – giving visitors more to do when they are here
- Extending the season – Renoir exhibition took place 30 Sept – 17 Dec the exhibition

Art for Guernsey and Guernsey Museums provided the expertise and VisitGuernsey brought the media outreach programme which resulted in hugely successful national and international coverage.

This all resulted in a positive impact on the Island’s wider economy. An estimated 29% of ticket sales coming from off-island. Occupancy rates in November 2023 (40%) were 7% higher than in November 2022 (33%) and 9% higher than November 2019 (31%)

The work undertaken by Art for Guernsey, in collaboration with Guernsey Museums and the Giverny Museum, is an excellent example of innovation, creativity and collaboration.

Competitiveness



Improve the product

- A one-off Tourism Product Development Fund distributed in the last quarter of 2023 is bringing forward product developments assessed against specific criteria, in line with this framework.

See page 20 for the results

- Use visitor preference data to create relevant product and ensure we meet expectations.
- 85% of all leisure visitors in 2023 cited the natural beauty of the island and its beaches attracted them to Guernsey so it's important to work with private and public sector bodies to safeguard the natural environment, beach cafes, kiosks, and associated services.
- Continue to support and work with event organisers both to ensure the continued success of established events and encourage new ones.
- Accepting that the majority of events may be 'value added', work with event organisers to market and create packages to lengthen the stays
- Use events to encourage repeat business
- Highlight local produce across cuisine
 - Promote farm-to-table experiences: Guernsey has a strong agricultural sector, and promoting farm-to-table experiences can provide visitors with an immersive and educational culinary experience. This can include farm visits, cooking classes, and tasting tours.
 - Host food festivals: Hosting food festivals can showcase Guernsey's culinary offerings and attract visitors who are interested in food tourism.



Accommodation stock

- Safeguard our visitor bedstock.
- Encourage investment and reinvestment to maintain or enhance quality of the accommodation
- Deter managed decline as an exit strategy



Connectivity

- Ensure that the needs of the visitor economy and the in-bound traveller are represented with Economic Development when considering route development and approaches to potential new services/routes
- Regularly communicate and liaise with carriers serving the islands to ensure that the needs of our visitors are considered in scheduling decisions and actively monitor reliability.
- Ensure that the support of new routes is covered in marketing strategies



Affordable, reliable and well-connected

- Work in partnership with the Guernsey Retail Group to better align our strategies.
- Ensure we are providing value for money across accommodation and carriers, and understand how that is measured.



Provide an excellent visitor experience

- Introduce a Guernsey Ambassador Scheme to encourage a consistent, quality approach to visitor-facing customer service, including the promotion of media training for key figures in the industry.



Improve inter-island connectivity

- Facilitate inter-island connectivity with an aim of 'island hopping' becoming a genuine unique selling point.

- Collaborate with and actively support the other islands of the Bailiwick to safeguard links and support growth in inter island travel.
- Work closely with Jersey on areas of opportunity and mutual benefit and to promote travel between the islands.

Tourism Product Development Fund

In 2023, Economic Development allocated £150,000 to a one-off Tourism Development Fund, for groups and individuals to apply for funding for projects that improve and enhance the visitor experience and attract additional visitors to enjoy. In total, the TMB received 20 applications for the Tourism Development Fund, totalling requests for more than half a million pounds.

Successful recipients were:

Festung Guernsey

To complete the second phase of the refurbishment of the German defences at Fort Hommet Headland and also upgrade the group's website.

DanceSport Association

To support a three-day British Isles DanceSport Championship.

The Guernsey mark

To support a campaign to encourage local restaurants, cafes, kiosks and visitor accommodation to stock, use and promote local produce.



Street Festival bunting

Representing a value-added experience that the St Peter Port Street Festival gives to our visitors.

The Graniteman Weekender

An extension of the existing Guernsey Graniteman event, funding new activities including a triathlon event and additional activities for children.

Boatlife Angling

Guernsey will host Rounds 7 and 8 of the Boatlife Angling Championship (BAC) presenting the opportunity to highlight Guernsey as an angling destination.

Floral Guernsey

Blooms by the Shore is just one of the projects Floral Guernsey have planned, enhancing the overall experience for visitors, particularly our much-loved coastal kiosks.

Twinning Association

Contribution to support the St Saviours/ Monteborg Twinning Association stall at La Foire de la Chandeleur.

Vivier Bunker

Supporting the development of this underused but well placed building to be a new and exciting gin distillery and attraction.

Routes and route development

Significant to our ability to be competitive is the viability of our air and sea connections. This is especially important when you consider that our primary market, the UK, is more likely to consider us a domestic option.

There has been much public commentary on the need, or not, for an extension to the runway and the benefits that this will bring. By majority, the TMB did not consider the runway extension to be the best use of public funds at this point.

The ability for low-cost airlines to schedule Guernsey does not mean that they will, nor that they will offer a competitive price point or that we would be able to sustain those routes. There is much to be celebrated about the security of owning our own airline in Aurigny and the commitment that brings to lifeline connectivity for the islands.

During 2023 there have been several new air routes announced, the introduction of the new Dublin route brought an additional 4,416 departing passengers (8,711 arrivals and departures). In 2024 we will see the introduction of five new UK routes and the much-anticipated Paris route.

Although the starting price point on all routes is reasonable, demand pushes up those prices with local travellers then potentially influencing affordability for visitors. For this reason it is important that Aurigny continues to actively market the variety of routes and likewise VisitGuernsey actively promote the new routes where affordable fares remain available. The TMB will continue to work collaboratively with Aurigny to ensure the balance of profitability versus affordability.

We see opportunity with greater working partnerships with Blue Islands and look forward to strengthening our relationships and particularly in realising growth in our interisland connectivity for both ourselves and Jersey.

There remain opportunities with the trade to supplement scheduled flights in the charter market while continuing to pursue the development of new scheduled routes. Success depends on Guernsey's close relationship with the trade, the availability of available charter aircraft and/or seat allocations on a triangular route and the provision of room rates that ensure viability. VisitGuernsey will continue to broker these relationships and we recommend the stakeholders keep up to date with trade news on www.guernseytrademedia.com and the opportunities to meet and network with trade partners.

Our main focus on sea travel is to work collaboratively with Condor to maximise connectivity, support the tourism sector by utilising all key routes and in doing so meet the strategic aims of the TMB.





Air Routes - 2024

Year-round

- Manchester
- East Midlands
- Birmingham
- Bristol
- Exeter
- Southampton
- London Gatwick
- Alderney
- Jersey
- Paris (new for 2024)
- London City (new for 2024)

Seasonal

- Dublin
- Leeds Bradford
- Rotterdam
- Groningen
- Zurich
- Palma, Mallorca
- Valencia
- Ibiza
- Menorca
- Alicante
- Biarritz (new for 2024)
- La Coruna (new for 2024)
- Bilbao
- Porto
- Newquay (new for 2024)
- Grenoble
- Liverpool (new for 2024)
- Edinburgh (new for 2024)
- Stansted (new for 2024)



Sea Routes - 2024

- | | | |
|------------|-----------|------------------------|
| Poole | St Malo | Dielette |
| Portsmouth | Cherbourg | Carteret (via Jersey) |
| Jersey | Alderney | Granville (via Jersey) |

Stewardship



Develop and maximise Guernsey's unique heritage

- Encourage conversion to develop niche accommodation sites
- Work with the Museums sites to introduce new product and align marketing
- Occupation/Liberation Day - ongoing support for associated groups to promote this unique aspect of our history - in particular the lead up to the 80th anniversary of our liberation in 2025



Develop and market Guernsey's Arts & Culture offering

- Maximise our cultural links – Renoir, Victor Hugo, including the support of the building of a new Victor Hugo Centre
- Work with arts groups to support on island events with visitor appeal
- Encourage civic pride – keep Guernsey beautiful with the support of associated groups (Floral Guernsey, parish groups, Guernsey Arts Commission)



Consider innovation projects to maximise visitor experience

- Working in partnership with the Guernsey Retail Group to better align strategies
- Work with the Guernsey Development Agency



Develop, promote and enable sports and other events

- Forge stronger connections with the Sports Commission
- Work with sporting groups to support events that bring competitors, support teams and spectators to the island



Consider other growth areas

- Collaborative working with Ports to encourage more private vessels and aircraft
- Sustainable cruise liner industry
- Identify viable market opportunities

●●● Recognition of the importance of tourism locally

- Promote the importance of the sector to the local economy
- Promote the benefits to the local community (events, breadth of hospitality offering, retention of travel links)
- Promote media training for key figures in the industry to present a joined up voice
- Reduce leakage from local economy
- Local produce endorsements
- Encourage hospitality to buy local



Working together with Festung Guernsey

Collaborative working is at the heart of what we think is the best approach taking us forward.

Festung Guernsey is a volunteer group dedicated to restoring our WW2 history. They have been awarded funding from the Tourism Development Fund for two key projects – to complete the second phase of the refurbishment of the German defences at Fort Hommet Headland and also upgrade the group's website.

The Fort Hommet project aligns with one of the key themes for marketing the island in 2024/5, our heritage. It capitalises on the 80th anniversary of the D-Day landings in 2024, and the subsequent anniversary of our Liberation in 2025. Festung's work includes excavation of the MG Tobruk and affiliated bunkers as well as installing power cables and interpretation boards.

Festung Guernsey's aim is to restore and preserve the most important fortifications built in Guernsey by the German occupying forces between 1940-45 and make them available to the public. Some of the locations have been extensively and sensitively restored, while others are secured in the condition they were found soon after the end of the war.

Festung volunteers become ambassadors and partner experts, bringing this part of our history to life, whether that be through providing expertise, new product that VisitGuernsey can use to draw in potential visitors (by opening new sites), featuring in short films and online content and meeting with visiting journalists.

Their expertise is our strength. The islands are very lucky to have such a dedicated group of volunteers working to preserve our history.

Accommodation

The profile of visitor accommodation has changed significantly over the last 20 years. In 2000 accommodation stock sat at 7,401 beds reducing to 4,854 in 2020, a drop of 2,457 beds over a 20-year period. In 2024, the current bed stock sits at 5,019 with 4,818 currently available (201 being closed for re-development) which indicates a slowing in the loss of beds.

The largest proportion of closures has been in 2* hotels. It is unsurprising that 3* and 4* options are more popular with our market as the cost of visiting the Bailiwick rises, expectations rise alongside that, and the marketing responds to target a more affluent visitor.

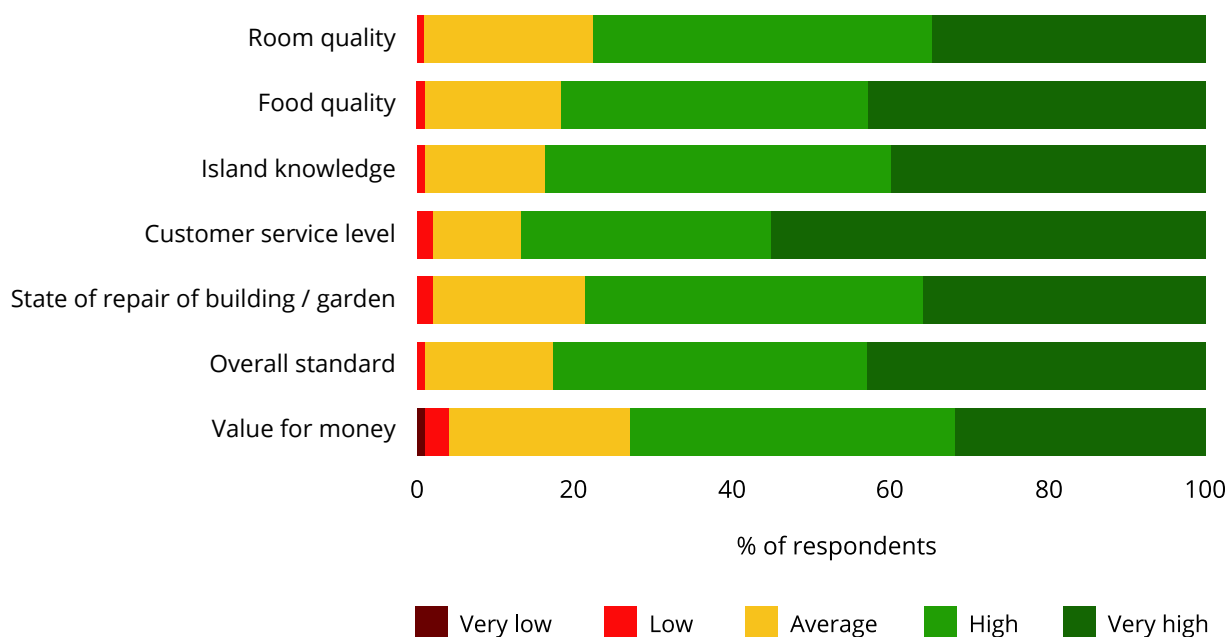
There has also been a reduction in the number of self-catering sites. In 2000 there were an estimated 134 self-catering businesses which has now decreased to 80. Although self-catering

remains a popular choice for our market there are other motivating factors for self-catering owners to leave the industry. That may be age or ill health but alongside that the value of self-catering properties increases significantly if the owner can obtain a change of use and can sell the property as a domestic dwelling on the local market.

Current planning rules dictate that self-catering units can exit the sector where there are two units or less which are attached to a domestic house or within its curtilage and, as domestic property can attract a higher price than a self-catering unit on the housing market, this provides an appealing opportunity to exit the sector.

The quality and cost of accommodation available is undoubtedly a deciding factor for our visitors when choosing the Bailiwick as a destination to visit with the quality of their experience influencing decisions on whether to make a return visit and what they share on social media and tell their friends.

How visitors rated their accommodation in 2023



Today's visitor not only wants value for money and quality but there is an increasing popularity for more quirky accommodation such as glamping, treehouses, lighthouses, railway stations, floating pods, churches and heritage sites.

There needs to be flexibility within planning regulations so that potential investors can develop quality accommodation potentially outside of the main centres and not on existing sites. For example, if a developer wanted to build a hotel close to the airport, then provision needs to be built into the Airport Master Plan.

There has been significant investment in some of the local landmark hotels: La Grande Mare and the Bella Luce will be offering new accommodation with a number of other properties investing in improvement programmes to modernise and refresh their product. The opening of a new Premier Inn hotel in 2022 was a welcome well-known brand addition which benefits Guernsey with their marketing spend and loyal clientele. Guernsey must continue to signal its willingness to facilitate investment.

Airbnb and other 'holiday homes' should be further encouraged to offer a variety of choice and price points. There is a 10-week rental policy for homeowners who let out their property through Airbnb with most taking advantage of the peak season – June, July, and August. Permitting homeowners to rent their properties for longer than a 10-week period would open up these options for the shoulder months.

Successful outcomes rely on all stakeholders working together.



Industry

- Ongoing investment in accommodation will contribute to the overall “experience” for the visitor.
- Focus on green/sustainable initiatives to meet the requirements of an increasingly environmentally conscious audience
- Understanding the strategic direction will help businesses understand the target audience and the help and support available from VisitGuernsey, much of which is free of charge.
- Investing in marketing is essential in the current climate. This is not only in collaboration with VisitGuernsey but with independent marketing, a good quality website with quality photography being a minimum expectation to promote the highest occupancy possible over the peak season and shoulder months.
- The modern day booker wants a seamless booking process; upgrading booking systems & software will ensure no sale is lost.
- Look for opportunities to partner with tourism related businesses to create unforgettable experiences.
- Supplying data to the States of Guernsey means that strategies and plans are aligned with need.



Tourism Management Board

- Pursue the development of heritage sites with the Guernsey Development Agency
- Work with the DPA and planning officers to ensure planning regulations support growth and investment in the tourism sector
- Continue to promote Guernsey and the Bailiwick as 'open for business' for investment in the sector

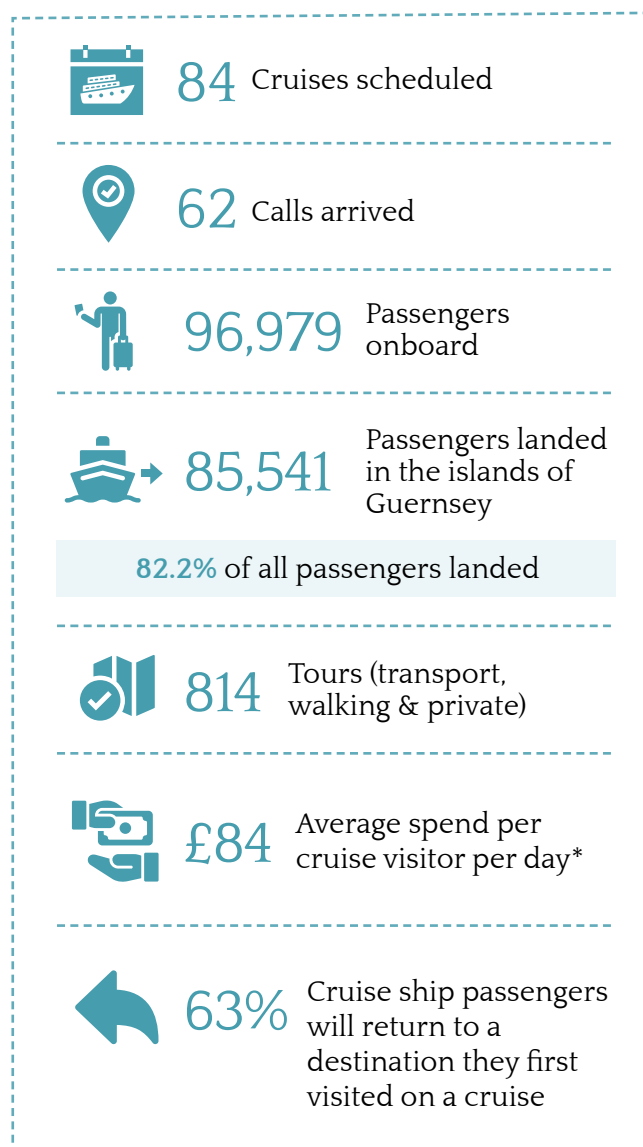


Government (Strategy)

- Ensure that strategies are reviewed to continue to meet the needs of industry
- Create a position within the Public Sector who will act as a central co-ordinator to meet the expectations of the business community and work through any barriers they might encounter.
- Review policies to ensure that they are accessible for investors and developers and collaborate with Locate Guernsey to identify and nurture opportunities for investment in the Tourism sector
- Ensure that Population Management policies and procedures meet the demands for staff for the industry

What is the cruise liner industry worth to the economy?

During 2023:



* Cruisers spend an average of \$759 USD (£593, March 2024) per passenger in port cities over the course of a typical seven-day cruise, equating to £84 per day. Data collected from the '2023 State of the Cruise Industry Report' - Cruise Lines International Association

While cruise liner activity has returned post-pandemic, there has been a sharp decline in both calls (-23%) and passengers (-31%) between 2019 and 2023. This contrasts with a strong recovery of the wider cruise sector (+5% passenger growth for Europe, and +9% globally).

In 2023, cruise ship passengers generated an estimated £3.4 million in direct expenditure for Guernsey's economy. However, if passenger numbers were still at their pre-pandemic levels (more than 110,000, vs. just over 80,000 in 2023), the value to Guernsey's economy would be in the order of £4.4 million.

Guernsey's post-pandemic drop in activity is mainly attributed to P&O relocating its 4,000-odd passenger ship Britannia to the Mediterranean and the cruise line reducing its calls at Guernsey substantially (from 18 in 2019 down to 6 in 2023). This was a direct consequence of Brexit: now that the UK is outside the EU, duty-free sales on board cruise ships can take place anywhere around the British Isles, and not just in the Crown Dependencies.

The Guernsey Tourism Partnership (GTP) has advised that without cruise passengers, numerous attractions and local businesses would not be able to survive, and this would have an adverse impact on the Island's overall tourism offering.

Cruise ship passengers will decline further in 2024 and 2025, due to Princess Cruises and MSC Cruises deciding to drop Guernsey from their respective itineraries.

Princess Cruises' issues were due to congestion with its small tender boats (particularly on days with other cruise ships calling).

MSC Cruises' issues were due to the lack of service reliability from the local shore-based tender offering, which they favour over using their own tenders.

Consequently, in 2024, the number of cruise ship calls is expected to decline by around 7%, and passenger volumes are expected to drop by around 43%.

Following discussions, several States of Guernsey operational actions have already been implemented to help re-attract the two cruise lines to Guernsey from 2026.

Despite the challenges, Visit Guernsey's continued engagement and promotional efforts have generated valuable new business, with 9 ships making an inaugural visit to Guernsey in 2023. This is largely due to a new business focus on smaller ships for which tendering operations are more straightforward.

In 2023, the majority of calls (48%) were from boutique cruise ships, but the vast majority of passengers (81%) were from mainstream cruise ships (owing to their size).

On average, 80% of cruise passengers disembark and visit Guernsey. This is understood to be much higher than the industry average of 60-70% and is testament to Guernsey's popularity with passengers.

It has been reported that on large cruise ship days, when 3,000+ passengers disembark, space and transport capacity constraints mean that passenger queues can build up and it can be more difficult to provide everyone with a quality experience.

In 2023, Princess Cruises and MSC Cruises advised (independently) that they would be dropping Guernsey from their respective itineraries in 2024 and 2025, both citing tendering issues. This is significant: together, the two cruise lines accounted for 28% of calls and 63% of passengers coming ashore in 2023.

Among the 34 Cruise Britain member ports, Guernsey is one of only 5 tender-only ports.

With other ports around the British Isles investing in cruise ship infrastructure, Guernsey will need to consider investing in its own facilities if it is to remain an attractive port of call.

The following strategic actions are therefore proposed:



Maximise the economic value of cruise to Guernsey by increasing visits by all types of cruise liners and the number of passengers coming ashore.



Continue to engage with cruise lines and promote Guernsey as a port of call and holiday destination.



Investigate the potential to invest in a tender pontoon extension, as part of the Harbour Action Area Local Planning Brief.



Explore the potential to establish a dedicated, on-Island shore-based tender service.



Investigate the potential to introduce environmental sustainability initiatives and technology for the cruise sector.

Summary

This framework is a really positive first step in bringing together all areas of the tourism industry with a shared focus. It is important to note that this sits alongside the, already published, VisitGuernsey marketing strategy.

I would like to thank my fellow TMB Board Members for their support and advice when producing this document and importantly I have to thank everyone who has worked together to inform it. This includes the many industry members who have attended workshops and meetings with us, our colleagues in the 3rd sector such as Arts for Guernsey and the Sports and Arts Commissions, alongside States of Guernsey political representatives and officers. Such a positive approach and a real willingness to work together to safeguard the future of tourism in the islands, bodes well for our continued recovery following the most challenging of times for our industry.

This document provides the industry with a roadmap to ensure competitiveness, stewardship and productivity for the industry. Our key strategic aims have received the support of industry representatives and will provide a framework and focus as we move forward into 2025 and beyond. Assigning actions to each aim



means that they become more than just words on a page but instead are tangible, can be delivered and measured and we become accountable in our shared desire to invest in, and grow, the tourism industry.

While publication of this document is an important first step, and the first time that the industry has authored its own framework for tourism, there remains much work ongoing. Areas of the framework will be updated regularly as appendix to this document. Our focus now will be on our sustainability goals and the following areas:



Continue to improve data to that we truly understand our value to the economy.



Encourage private sector understanding of the framework to ensure experience meets the expectations of the target audience and we maximise spend.



Protect and maintain bedstock levels and invest to improve the quality of existing stock.



Prioritise extending the season.



Support political understanding of the value of tourism and champion investment.



Protect and maintain air and sea links



- **Land use** – policies regarding change of use and other possible barriers for people moving in and out of the industry.
- **Ease of entering the industry** – focusing on the increasing difficulties our colleagues in the sector are experiencing obtaining finance to upgrade or develop their tourism offering. We are aware that the Guernsey Chamber of Commerce is already lobbying for better business banking that will help new entrants and we aim to support them on this matter.
- **Staffing** – tourism and the hospitality sector can offer an individual a clear career pathway. We aim to work with the sector to promote the industry as a quality industry to work in. It is hoped that the Guernsey Ambassador Scheme and the Guernsey Mark will go a long way to supporting these aims and objectives.
- **Bed levels** – ensuring that we can define and support the right level of accommodation bed stock and standards and price that meet the expectations of our visitors and ensure our competitiveness

I am delighted that we are meeting our aims of collaborative working with industry and government and we will continue to do so with regular updates and networking events etc. If you would like to get involved then please contact tmbchair@gmail.com

I look forward to working with industry colleagues in 2025 and beyond.

Hannah Beacom
Chair

Contacts

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Natalie Davidson | Events Representative

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