

A low-angle, close-up photograph of a person's legs walking on a cobblestone path. The person is wearing a blue and white horizontally striped dress that is flowing around their legs. The person is barefoot. The lighting is warm, suggesting late afternoon or early morning. The cobblestones are dark and textured.

The ISLANDS of
GUERNSEY

2025 Strategy

TMB Strategy Actions

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.

Visit Guernsey Marketing Aims

Attracting more affluent customer, and spending our limited budget on the right audience fit

Support tourism pillars set out by the TMB - mainly Sustainability, Sports, History

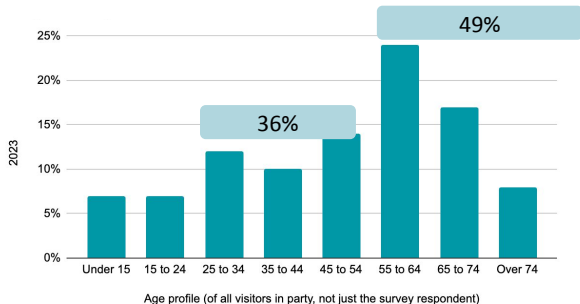
Market Guernsey as an all year round destination, using product offering to give compelling and multiple reasons to visit

Communicate our relevancy to changing market needs, and remain topical and agile

<https://gov.gg/CHttpHandler.ashx?id=176949&p=0>

Our visitor profile

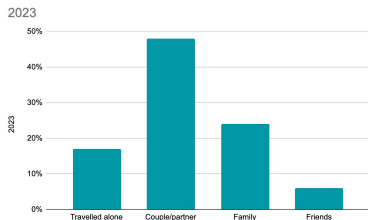
We are successfully attracting a broader range of ages, to help safeguard our tourism future



Couple and solo travellers make up the majority

48%

48% travelled to Guernsey as a couple or with their partner.



High value spenders

Our audience are spending in the higher tier categories (2023 visitor survey) 32% of respondents reported their party spent £1,500 or more on their trip (including travel and accommodation),



Our key markets and audience targeting

1. UK & Dublin

2. France

3. Jersey

Broad targeting : 35+ Couples, families inc multi-generational and solo travel

Our data tells us

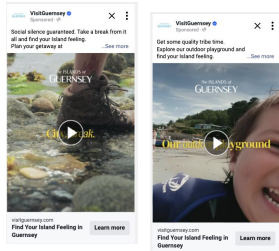
They are searching for

- Short breaks UK
- Weekend breaks UK
- UK Holidays
- Island holidays

(Google search data):

Google segments

- Beachbound Travellers
- Family Holidayers
- Luxury Travellers



Following the 2024 route development, we will be continuing to advertise to the French market, who are looking to holiday away from the warmer Southern regions.

Our past performance has given us insight into our audience profiling, which is very similar to UK audience

Located

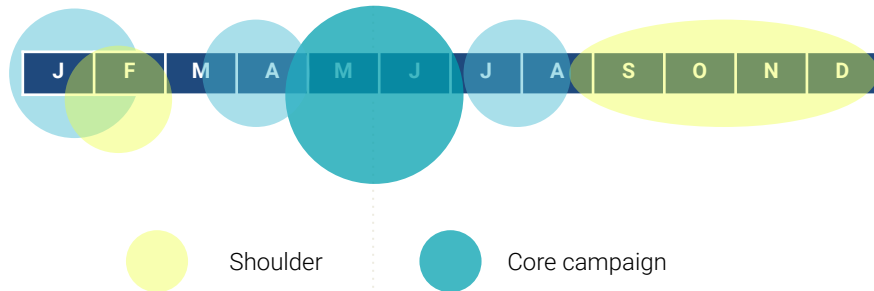
- Paris
- Normandy
- Brittany

Building on 2023 and 2024 neighbouring island advertising to encourage inter island connectivity.

Mass targeting with themes relevant to Jersey

Top cities based on 2024 marketing response:

- London
- St Helier
- Birmingham
- Paris
- Dublin
- Edinburgh
- Plymouth
- Wolverhampton
- Milton Keynes



Our narrative and opportunities

Opportunity 1

Off peak travel + Slow Travel

Off peak travel, is becoming peak too

“Shoulder season travel is growing in popularity in 2024, likely as a consequence of both the changing climate and a growing desire to avoid the crowds.

Holidaymakers looking for places with the “right amount” of sun and the “right amount” of fellow tourists, will be booking outside the traditional peak windows, incentivising hotels and resorts to extend their summer season opening periods.”

BA Travel Trends Report 2024

Slow travel

Travelling in a way that gives you time to take in your surroundings, the people, the culture, the food.

Quiet life

“Searches for 'quiet life' have risen by 530% in the last year”

Quiet places and calm places have risen 50 and 43 percent.

Source Pinterest



Off peak + Slow Travel Aligning with Guernsey

It's a way to travel in a more relaxed and more sustainable way. This trend is all about going deeper into the travel experience, think local craft culture and food nourishment, long walks, appreciation for surroundings, quiet and reflective moments.



Existing Product examples

- Boat travel
- Sark and Herm
- Alternative travel - by bike
- Camping
- Kiosk culture

Existing Events

- La Beltaine Sark
- Lé Viaër Marchi



Opportunity 2

A more holistic wellness story

The wellness industry and Wellness travel opportunity continues to boom

Wellness is no longer just a one off trend, it is broadening to incorporate many more individual trends

Valued at \$814.6 billion in 2022 and is expected to expand at a compound annual growth rate (CAGR) of 12.42% from 2023 to 2030. Source Forbes

in the US Wellness trips accounted for 7.8% of all tourism trips but represented 18.7% of all tourism expenditures in 2022 (so almost 1 in 5 total "travel dollars"). Source Skift

Tourism opportunities within this trend include, and not limited to

- Spa and escapism
- Fitness and activity travel
- Sleep travel
- Women only
- Solo travel
- Multi generational wellness
- Remote / off the beaten track
- Blue zone travel
- Pilgrimages - walking and discovering
- Eat well and food provenance
- Sustainable travel - food , environment & culture



Outdoor Wellness

Aligning with Guernsey

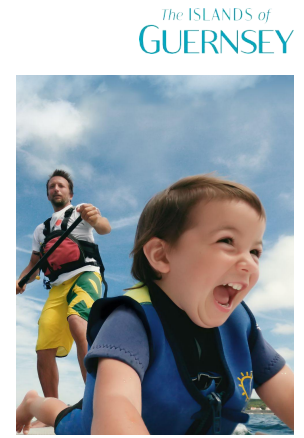
Outdoor spaces are an important part of our wellness story, and outdoor therapy is being increasingly sought after to treat stress and over stimulation. This trend doesn't need blue skies nor 5* spa experiences and is broadening to include families. Think natural luxuries, comfort and warmth alongside outdoor experiences

Incorporating Product Stories

- Coastline walks
- Wild swimming
- Sports for wellness / togetherness
- Outdoor connection
- Camping / outdoor accommodation
- Hot Haus Sauna

Existing Events

- Room for development beyond existing retreats

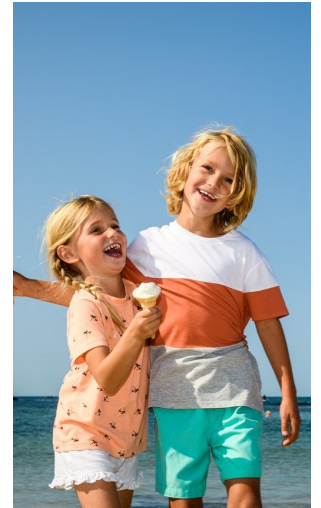


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Food wellness & Provenance

Aligning with Guernsey

Food is an important part of travel, but we are seeing food provenance playing more of an important role. This trend includes the backstory, the growers and where possible includes the visitor. For this trend think kitchen gardens, pick your own, from farm or greenhouse to table and minimal food miles.



Incorporating Product Stories

- Seafood and oysters
- States Dairy
- Locally grown & Guernsey Mark
- Hedge veg
- Gin & Cider

Existing Events

- Food Festival
- Edible
- James Strawbridge partnership



Opportunity 3

More active travel appeal

Alongside outdoor wellness, many more are looking to continue their fitness on holiday or travel specifically to take part in or watch a sports event

More specifically

- **Surfing** interest is on the up - while Surf England reported a boom in people booking lessons nationwide
- Strava's year-end report shows that more **runners** are turning to competition
- In 2023, approximately 7.4 million people participated in **cycling**, either for sport, leisure or travel, in England. Source Statista
- Our seas are opening a new **fishing** opportunity



Sports & active

Aligning with Guernsey

Again set in outdoor spaces, this trend brings together individuals and groups. Less laid back than our general wellness trends, our sports audience are pushing their limits and taking on new sports or challenges. Likely to have equipment, training and dietary needs. Looking for new marathons, courses and legs to add to their bucket list.



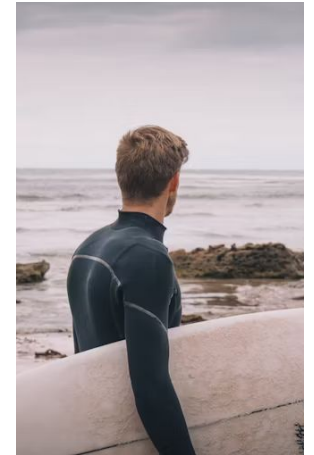
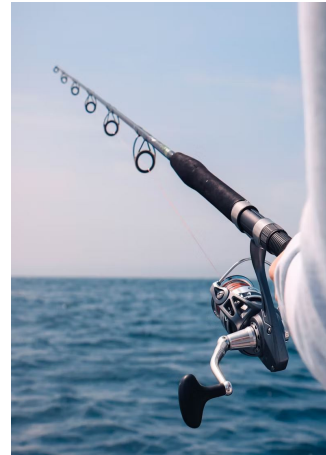
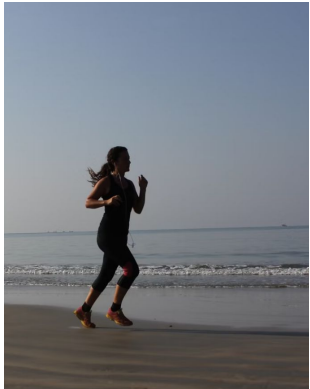
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Incorporating Product Stories

- Outdoor / water sports
- Fishing challenges
- Running & Fitness
- Cycling
- Football & Rugby

Existing Events

- Marathon / half marathons
- Round island walk
- 30 bays
- Cycling routes
- Team sports



Opportunity 4

Increase in historic appeal

**Cultural and historical travel accounts for 40% of all tourism globally
73% of millennials report being interested in cultural and historic places.**

Our key opportunities

Monuments and historic sites

More than 550,000 families enjoyed a visit to English Heritage sites in 2023, the highest figure since records began and an increase of 54% over the last decade. English Heritage

Gen Z driving the boom, looking for war tourism experiences, as their interest for Nostalgia continues to boom

Historic walks

With many new historic walks and monuments in the UK re-opened for 2024, our UK audience are being invited to walk and explore places they've never seen before.

Genealogy Tourism

In 2019, an Airbnb survey found that the share of people traveling to "trace their roots" worldwide had increased by 500 percent since 2014.

Increase in immersive history experiences

Singapore is looking to use 5G-powered augmented reality technology to show visitors what World War II was truly like for the fort's defenders and UK troops.



History tourism Aligning with Guernsey

With a younger demographic driving the growth, we have an opportunity to retell our stories to new audiences.

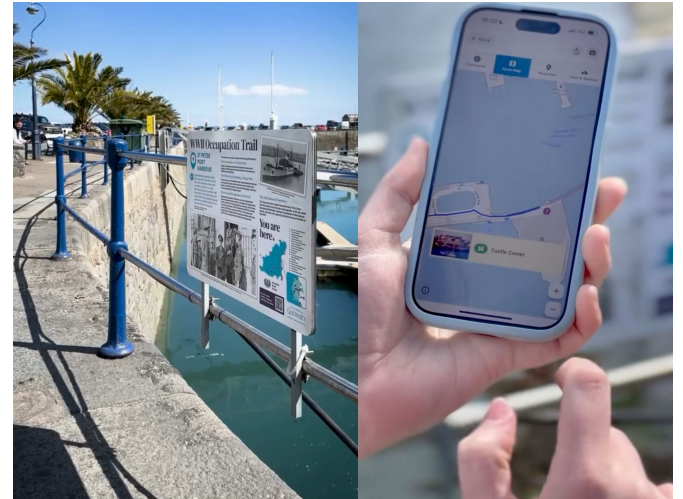
Think Instagram moments, more engaging formats to retell our stories, fully immersive experiences that bring another dimension and personalisation to the educational experience.

Incorporating Product Stories

- Monuments and fortifications
- Museums
- App and history layer
- Walks
- Podcasts

Existing Events

- Liberation
- European Bunker Day
- Fete d'Etai
- HistoryFest



Opportunity 5

The Renoir Case Study

The success of Renoir, shows us how art can create powerful stories for our island.

Future Market Insights: Forecasts a 2% CAGR for the art tourism market

“Artists and cultural organisations have the power to transform places, creating happier lives for people in villages, towns and cities all over England,”

Darren Henley, chief executive of Arts Council England.

Why is this an increasing trend

- Increasing disposable income amongst the affluent to engage, plus an increase in middle classes worldwide
- Desire for unique experiences and stories
<https://markwideresearch.com/art-tourism-market/>



Arts & Craft tourism

Aligning with Guernsey

Art Tourism is more than just exhibitions, it's about visitors immersing themselves into a destinations cultural and art offerings, current and past.

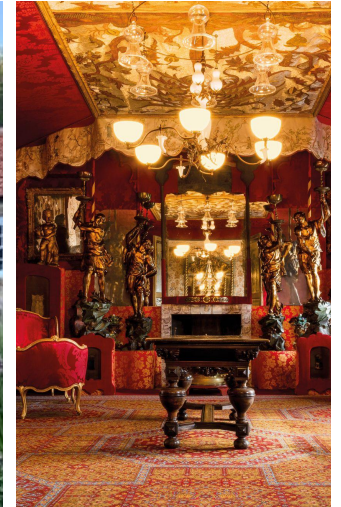
As with our other trends, it's a holistic experience with opportunity beyond galleries.

Incorporating Product Stories

Turner & Renoir
Victor Hugo -
Local craft and makers
Museums

Existing Events

Museum arts
programme
Lé Viaër Marchi
Le French Festival

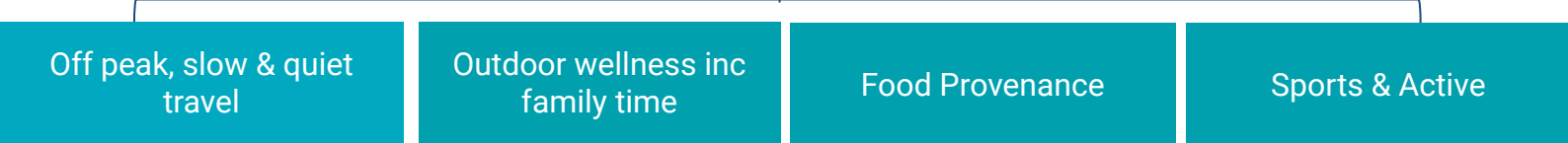


Summary of core themes

Broad theme

1. Wellness

Consumer travel trends



Supporting products and events

2. History & Arts



Supporting products and events

A balanced media approach

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Targeted TV through Sky Adsmart

Targeting those with a propensity to travel + take domestic trips

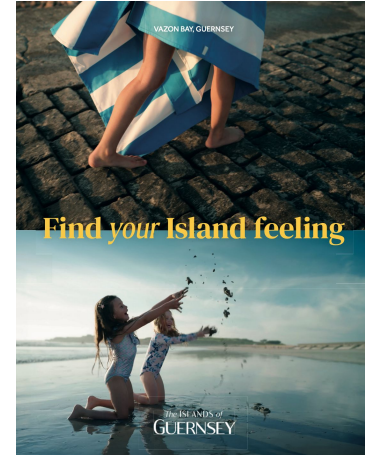


Out of home

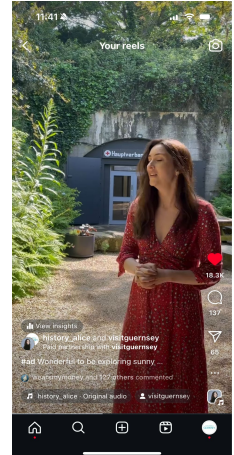
High visibility around key departure points



Print: Lifestyle & broad targeting - across age groups, skew towards traditional, examples include:



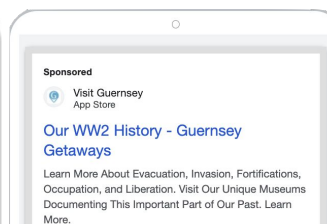
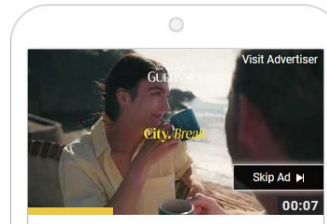
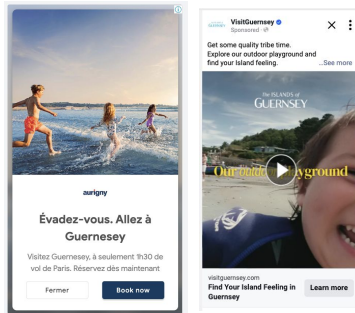
Influencers:
With credible alignment and reach



Digital Media

35+ audiences optimised with relevant creative (test and learn)

- YouTube
- Meta (Facebook & Instagram)
- Pinterest
- Google Display
- Search



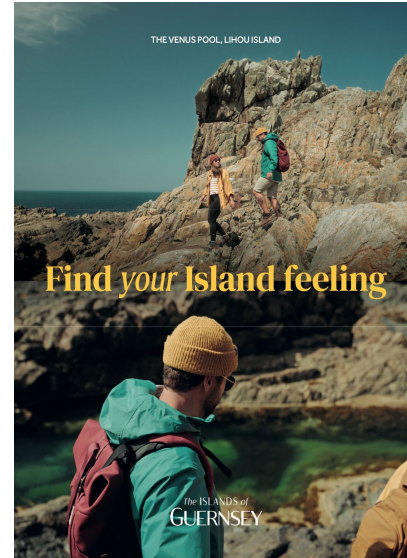
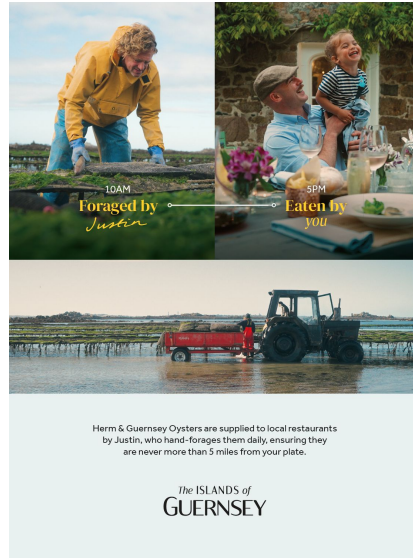
The Telegraph **goodfood** FAMILY **SAGA** **RADIO TIMES** **TRAVELLER**

Organic social
1000s of pieces of content

- Reels
- Stories
- Feed
- Blogs

Flexible assets, for multiple audiences and all seasons

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2025 Additional creative

1. Created from existing footage and assets

- Slow & off peak travel
- History

2. New production

- Peak summer in Herm - new shoot
- Sports and active - new shoot
- Men's wellness - new shoot
- Food provenance with ambassadors - new shoots