

Guernsey Tourism Management Board

OCT | 2025

Our Vision, your island

“Brittany Ferries will introduce an approach to passenger and freight management based on a philosophy we have proudly embraced for more than 50 years. We exist to connect people, facilitate trade and enrich the regions we serve. So, in this new era the Island will be put first, services will improve and benefits will be felt by all.”

Christophe Mathieu

Celebrating our Island spirit and building a sustainable future for tourism

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.

**Framework for the Visitor
Economy**



Together we've been busy.....

Collaborating, learning and promoting



Several rendez-vous

2 April 2025
Guernsey

Organised as part of the new direct Saint-Malo <-> Guernsey route, operated by Brittany Ferries. In the presence of members of the Guernsey Government, Visit Guernsey, Brittany Ferries, elected representatives from the Brittany region, Saint-Malo Agglomération and the City of Saint-Malo, as well as a representative from Destination Saint-Malo Baie du Mont-Saint-Michel.

23 June 2025
Saint-Malo

Organised to follow-up on actions discussed in the presence of members of Visit Guernsey, Brittany Ferries and Destination Saint-Malo Baie du Mont-Saint-Michel.



The VisitGuernsey 2026 5 Point Strategy Summary

- Increase Consumer and Lifestyle Appeal:** Attract a high-value audience through a content-led approach, influencer collaborations, and aligning with high-end publications.
- Diversify Offerings:** Focus on key product pillars: Wellness & Outdoor Experiences, Food Provenance, Sports & Active Tourism, and History & Arts.
- Multi Market and Multi Route Marketing Activity:** Deepen the connection with the French market, refine targeting in the UK, and revitalise the Jersey market.
- Optimise Media Budget:** Deploy a mix of high-impact out of home advertising, targeted video on demand, PR, and owned channel optimization to reach the target audience.
- Maximise Impact through Partnerships and Co funding:** Continue successful co-funding campaigns with partners to amplify the marketing message through nationwide and targeted TV, regional radio, and direct conversion campaigns.



Points of discussions – June 2025

Follow-up discussions on tourism:

- Guernsey accommodation: niche, quirky self-catering type of accommodation are the growing ones to capitalize on. Aligned with the 'Uncommon Holidays' campaign of BF.
- One brand new Golf course under construction for opening late 2025 in Guernsey
- Set up itineraries for different persona: solo travelers, footpath (GSY), with bicycle (Sark)...
- Business trip offer: Chamber of commerce in GSY with a Trade meeting. Sport tourism can be an angle.
- Local events: Music festival are a good common angle as well as gastronomy.
- Holidays/Experiences: pre-sale through a common market place that needs to be consumer focused

Follow-up discussions on PR:

- Objective of OT SM: bring back journalists who came 2-3 years ago by adding something new.
- Organize a joint journalist trip
- Regional media: Ouest France with destination article / The Guernsey press is travelling in August with 2 N in Saint-Malo and then off to Mont-Saint Michel
- Social media competition: Bailiwick station club: 6-7K local people where VG can run a competition
- Influencers: Influencer conference (22 people for a week) planned in September



Channel execution – Visit Guernsey campaigns live in Spring

2025 TV Storyboard – End Frame



Display



Social AV



Paid social



Visit Guernsey [Summer]

Display Ads 2x Styles



Our ships are also evolving

Islander & Voyager

Discovering the beauty of Guernsey islands



Cabin names & signage

All premium cabins have been named after key touristic places across Guernsey islands in collaboration with Visit Guernsey



Guernsey map

A map of Guernsey islands is locating the cabin names, inviting passengers to come and visit



Destination photographs

Both ships have been decorated with visuals provided by Visit Guernsey

Islander & Voyager

Onboard experience – Retail & Entertainment



Supporting and showcasing your community



We are proud to support the recently formed **Ace Elite Cheerleaders** in Guernsey ... See more



We were honoured to once again, support the Fleet Air Arm's visit to Guernsey last weekend.... See more



We are once again delighted to support the **Guernsey Air Display** as some of Britain's most historic and treasured military aircraft take to the skies over the Island 🇮🇪 ✈️

The annual event – established in the Island's calendar for over 60 years – sees a whole host of vintage aeroplanes perform alongside the best of the RAF.



We were delighted to support Guernsey's Island Games team once again as they set off for the upcoming event in Orkney! 🇬🇪 🏴󠁧󠁢󠁥󠁮󠁧󠁿

A fleet of seven vehicles packed with equipment, along with 20 members of the support team, travelled on Islander to Portsmouth on Wednesday 9 July to begin their 850-mile journey to Kirkwall.

The Island Games is a fantastic celebration of sport and island communities. Taking place from 12 to 18 July, the week-long event brings together athletes from up to 24 island groups around the world, competing across 12 exciting sports.

Find out more about this inspiring event:
<https://www.orkney2025.com/>

Guernsey Island Games Association (GIGA)



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🇮🇪 We are proud to continue to support Guernsey's much-loved community events – the West Show, Donkey Derby and North Show.

🇮🇪 This year we have helped bring everything from daring stunt riders and flying motorcycles to penny-farthing planes, dashing donkeys and a funfair.

© Guernsey Press

#Guernsey #DonkeyDerby #NorthShow #IslandLife



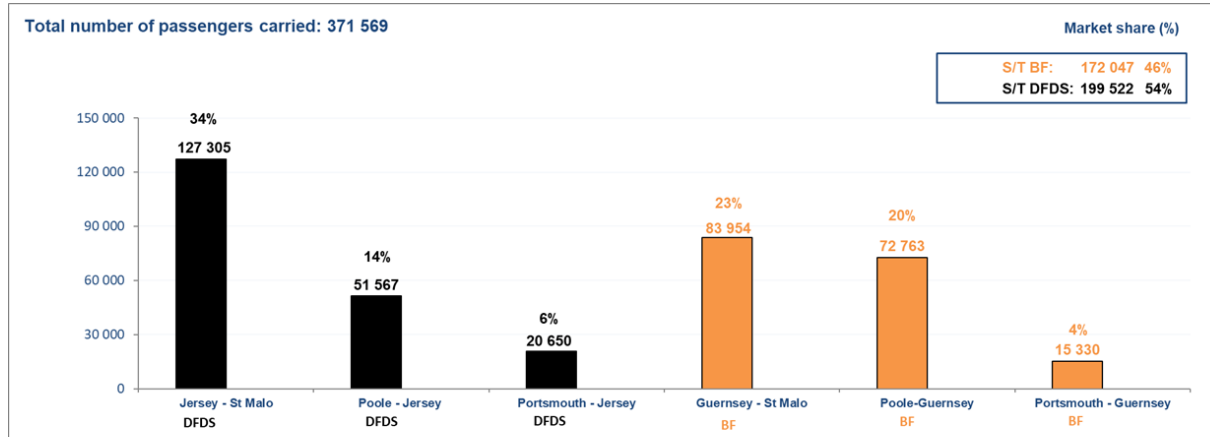
- 21 events and initiatives supported
- Over 400k impressions
- 25k engagements
- 6200 likes
- 300+ shares

And we're just getting started.....



2025 Summary

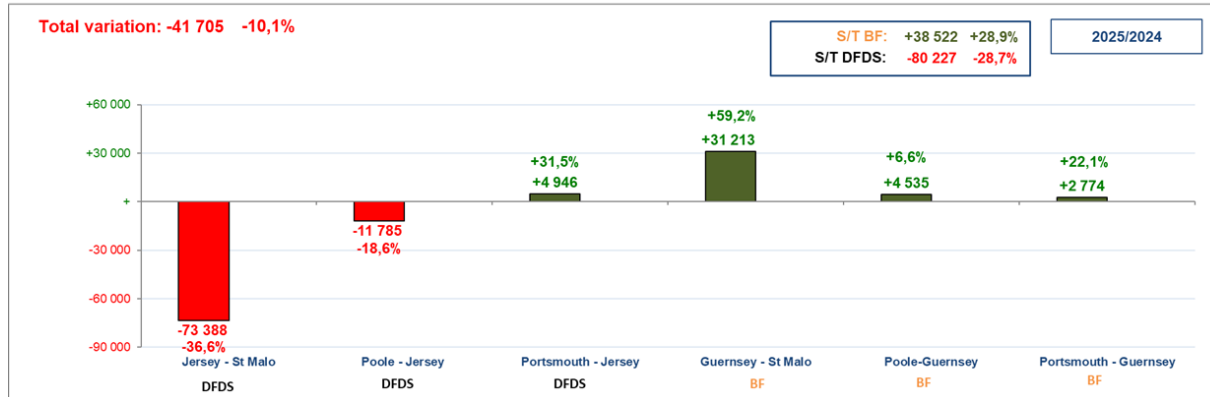
Market share summary (passengers)



Guernsey
46% Share
+28.9% YoY

Comments

+59% GSY – St Malo
+22% Portsmouth – GSY
+6% Poole - GSY



Competition

DFDS -28.7% YoY
-37% Jersey – St Malo
-19% Poole – Jersey
+31% Portsmouth- Jersey

2025 Headlines April - October

233k
Passengers

Visitors
+43k YoY
+43%

Visitors from France
+47%

Guernsey Breaks
Bed Nights up 19% YoY
2025: 7367
2024: 6208

Overall impression
76
+34

Value for Money
63
+37

NPS
51
+21

2025 April – October

Car pax + Foot pax	Wk		
Source and route	41	42	Pax last week
Channel Islands - Continen	98,883	99,356	473
Resident	35,329	35,555	226
Visitor	63,554	63,801	247
Channel Islands - Mainland	107,734	108,403	669
Resident	43,822	44,259	437
Visitor	63,912	64,144	232
Inter-Island	9,861	9,964	103
Resident	9,422	9,525	103
Visitor	439	439	0
Mainland - Continent	15,392	15,413	21
Resident	6	6	
Visitor	15,386	15,407	21
Grand Total	231,870	233,136	1,266

Passengers: 233k
 Visitors: 143K (+43%)
 France: 63k
 UK: 64K

Pax budget achieved	Dep month						
Row Labels	Apr	May	Jun	Jul	Aug	Sep	Oct
Channel Islands - Continent	143%	149%	137%	113%	126%	97%	98%
Resident	120%	108%	88%	99%	105%	79%	79%
Visitor	160%	175%	183%	125%	144%	115%	117%
Channel Islands - Mainland	103%	106%	77%	85%	99%	82%	88%
Resident	113%	101%	86%	96%	102%	86%	96%
Visitor	95%	110%	72%	79%	97%	79%	81%
Inter-Island	86%	94%	84%	118%	108%	78%	71%
Resident	90%	95%	89%	122%	114%	75%	73%
Visitor	13%	81%	28%	68%	39%	111%	48%
Mainland - Continent	75%	60%	38%	60%	87%	53%	74%
Resident							
Visitor	75%	60%	38%	60%	87%	53%	74%
Grand Total	116%	120%	94%	93%	106%	85%	90%

2026 and Beyond

OCT | 2025

26 Landscape summary

Legislation, Economy

- **ID cards for French nationals**
- **Cost of living remains a concern** for UK with consumer confidence generally trending low which **could see price sensitivity continue.**
- There are **signs the situation is stabilising** for many with 39% saying they are about the same financially as 12 months ago, 35% say better off.
- Despite financial pressure, **holiday intent is strong** with 31% have booked a holiday in the last 3 months and 34% intend to.
- Holiday search lagging previous years which further indicates lingering caution.

Customer trends

- Overseas travel predicted to grow
- Holidaymaker behaviours are evolving, but **we're equipped to address these changes and seize new opportunities**
- Travellers are seeking:
 - **Authentic experiences**, off the beaten track away from overtourism spots
 - **Quality over quantity**
 - **Value** (all demographics), and they're allowing more research time to find them.
 - **Personalisation**

2026 opened for sales in July, over 23k forward reservations secured

Accelerate and align marketing actions and uncommon holidays

Further systems synergy

Condor Breaks and BF Holidays

Expand local produce offering onboard

Trade events

Develop relationships with local events

Extend the season initiatives

Enhance our loyalty scheme

New ferry ticket and holiday products

Target UK market with short breaks

Expand continental reach

Continuous improvement and visitor growth

Merci biau des feis

Merci

Thank you