

### **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 VisitGernsey 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 a more affluent customer, and spending our budget on the right audience fit

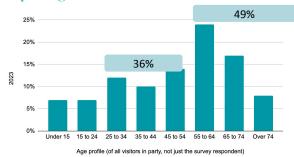
Support tourism pillars set out by the TMB - mainly sustainability, sports, history

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

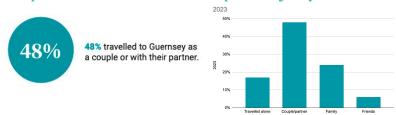
Communicate our relevancy to changing market needs, and remain topical and agile

### 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



#### **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 audience groups



Solo travellers 35+



Family 35+



Multi-gen inc 55+

Couples 35+





Couples 55+

Groups 35+





Groups 55+

### Our key markets and audience targeting



1. UK & Dublin

2. France

3. Jersey

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

Our data tells us They are searching for

Short breaks UK

- 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

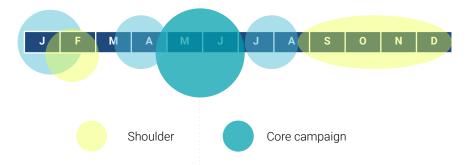
Building on 2023 and 2024 neighbouring island advertising to encourage inter island connectivity.

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 inc Island hopping

#### 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.

#### **Ouiet 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.

This is a core opportunity for island hopping.

#### **Existing Product examples** Boat travel

Sark and Herm - Island Hopping Alternative travel - by bike Camping Kiosk culture

#### **Existing Events**

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 in 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

















# 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

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

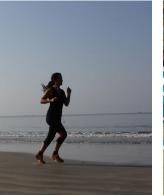
Again set in outdoor spaces, this trend brings together individuals and groups. Less laid back than our general wellness trends, our sports audience are pushing their limits and taking on new sports or challenges. Likely to have equipment, training and dietary needs. Looking for new marathons, courses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

#### **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 new opportunity, we have an opportunity to retell our stories to new audiences whilst capitalising on existing older volumes.

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











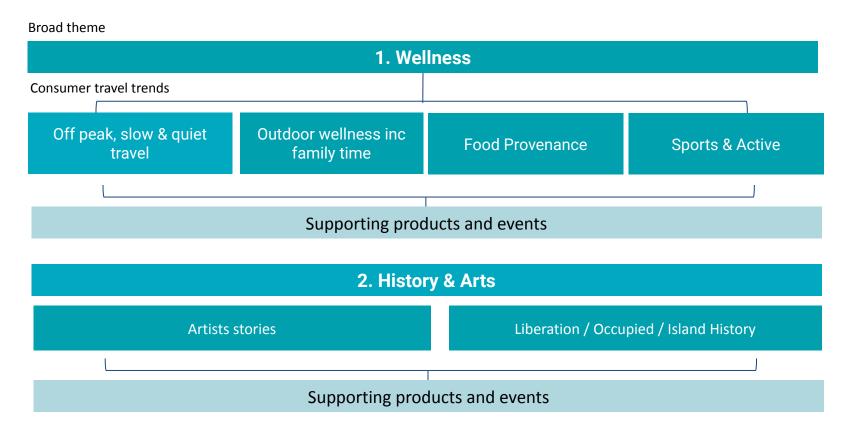






### **Summary of core themes**





### A balanced media approach

### The ISLANDS of GUERNSEY

#### **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

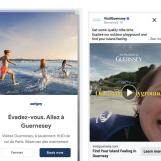


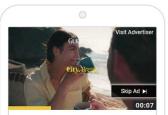
The Telegraph  $\begin{tabular}{ll} \hline \begin{tabular}{ll} \hline \textbf{Good} & FAMILY \\ \hline \textbf{RadioTimes} & SAGA & TRAVELLER \\ \hline \end{tabular}$ 

#### **Digital Media**

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

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









#### Organic social 1000s of pieces of content

- Reels
- Stories
- Feed
- Blogs

### Flexible assets, for multiple audiences and all seasons











#### 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