

A photograph of two women from behind, looking out over a coastal landscape at sunset. The woman on the left has long, dark, curly hair and is wearing a yellow sports bra and black leggings. The woman on the right has long, dark hair in a ponytail, wearing a red sports bra and black leggings. They are standing on a grassy hillside overlooking a body of water and distant hills. The sky is a mix of orange, yellow, and blue.

The ISLANDS of
GUERNSEY

2024 Marketing
Strategy Overview

The UK audience

Our starting point will always be defined by our air and sea links

Over the last two years we have taken a test and learn approach that has been optimised and refined to give us greater understanding

The Google segments that drive the most leads to our site are:

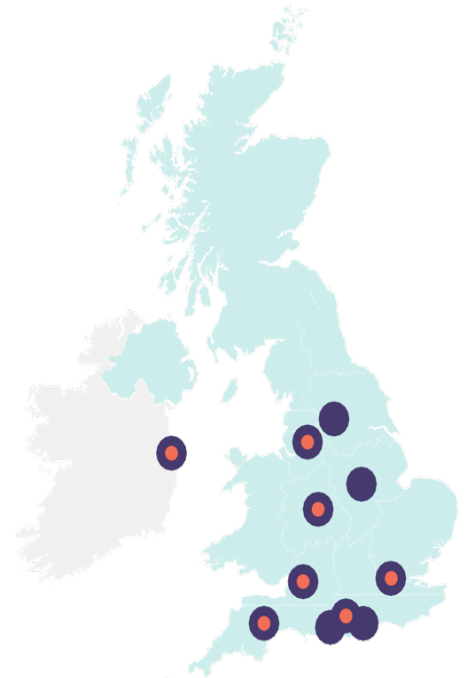
- **Beachbound Travellers**
- **Family Holidayers**
- **Luxury Travellers**

They are weighted towards 35-54-year-old females. The majority are based in and around our current key departure points - London, Birmingham, Manchester, Southampton and Bristol

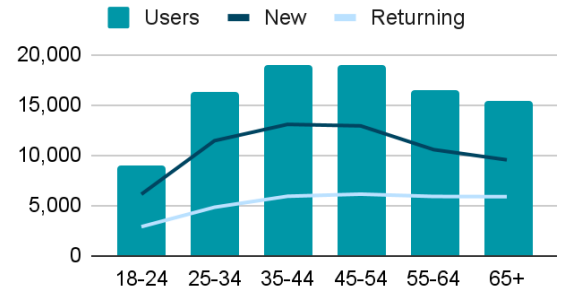
What they are searching for (Google search data):

- Short breaks UK
- Weekend breaks UK
- UK Holidays 2023

- National print and print partnerships
- OOH (Out of home)
- Targeted digital around key departure points - across channels



2023 website audience data



Understanding our visitors - and what they are looking for

Visitor data: Q1 & Q2 2023

Source: States of Guernsey Visitor Survey and States of Guernsey Exit Survey

Why are visitors coming here?

- 83% of all leisure visitors during the first six months of 2023 cited that the natural beauty of the island and its beaches attracted them to Guernsey
- The second most popular reason was the history and heritage (52% of respondents)
- The third most popular reason was the climate (35% of respondents)

Who is coming to Guernsey?

- 51% travelled to Guernsey as a couple or with their partner, 18% travelled alone and 21% with family/group
- Over half of all visitors during the first six months of 2023 were aged 55 years and above (57%)
- 23% were aged between 35-54-years-old



How do we reach them?

Marketing spend is focused around key departure points and audience profiling

- Digital and social media - targeted around lifestyle and departure points
- Print media - in TGI selected data - National press and lifestyle alignment
- Targeted TV - core segments around departure points
- Radio - Regional radio, around key departure points
- Out of Home - Travel hubs and departure points - TGI selected
- Website - 44% used the VisitGuernsey website to plan their trip (Source: States of Guernsey Visitor Survey, Q1 & Q2 2023)
- We know reactive marketing helps to drive a direct response, demonstrated in locations that feature in the Top 5 we see web traffic from:

Top 5 cities 2022:	Top 5 cities Q1 2023:	Top 5 cities Q1 & Q2 23:
London	London	London
Birmingham	Birmingham	Birmingham
Leeds	Sheffield	St Helier
Manchester	Wolverhampton	Dublin
Bristol	Manchester	Wolverhampton



Opportunities for growth now

The rise of the acti-holiday, family, teenagers and solo

Search spikes include:

“Teenage daily adventure holidays UK” a 750% rise in 5 years.

“Multi activity adventure holidays” a 90% rise in 5 years.

“Solo adventure holidays” a 90% rise in 5 years.

HOW? Work with trade to encourage and develop our product for this market and target this audience directly with marketing

Van life, glamping and UK staycation hotspots are in demand

“SUV Camping Ideas” - Demand increased by 76% (since 2018).

“Van Life” - Search volumes increased by 217% (since 2018).

“Glamping” - Search volumes Increased by 777% (since 2013).

HOW? Feedback from campsites is a spike in more affluent campervan travellers who are travelling from further, staying for longer and spending more during peak season. Explore how best to engage with this audience and extend the season

Transformational Travel

This type of trend is more than just travelling for pleasure, but aims to make a difference in people’s lives, particularly in relation to diet and wellness.

HOW: Continuation of promotion of wellness retreats and fitness camps, exploring ‘volunteering’ holidays or excursions where visitors can get involved with the community while on a break



Opportunities for growth - looking ahead to 2025

By working closely with trade, we can support and encourage new product development that speaks to emerging trends.

Sustainability

59% claim that the sustainability credentials of their holiday provider factors into their holiday plans (ABTA Travel Trends 2023).
HOW? The toughest to tap into, but we are trying to draw out stories around sustainability from trade to develop and build on - food miles, bio-fuel, recycled produce etc

Buying local / food provenance

Food-related searches with the term “traditional” or “authentic” rose dramatically in Q4.

HOW? There is a challenge in sourcing local producers who are prepared to be involved. Develop the Guernsey logo to advocate and encourage the promotion of locally made and sourced produce

Where travellers say “no” to conventional travel; breaking routines and searching for quirky, no-compromise experiences. (Expedia)
HOW? We have seen an increase in enquiries from cruise ship excursion agents looking for unique, bespoke activities/ experiences more authentic to Guernsey, which we are actively working with trade on. Also expanding our general offering, focusing on unique/quirky places to stay



The Jersey audience

2023 was the first time we actively promoted into Jersey with a digital billboard campaign in St Helier, co-funded by Condor Ferries - and it is already showing results.

Based on our performance data from the 2023 joint campaign, we performed across all age groups.

- Our biggest appeal being amongst 35-44-year-old males
- ‘Hop on over’ island hopping messaging appealed to an older 55+ audience
- ‘Small / big adventure’ messaging appealed to a younger 35-55-year-old audience
- ‘To the next island’ appealed across all age groups

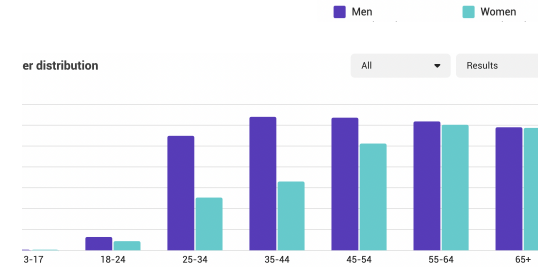
What are they looking for

- Likely to be shorter stay / day visits
- Escaping their existing surroundings with an easy excursion - variety and ease

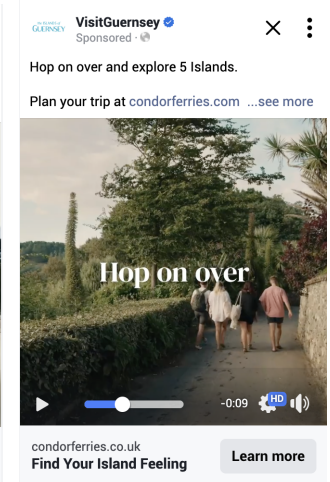
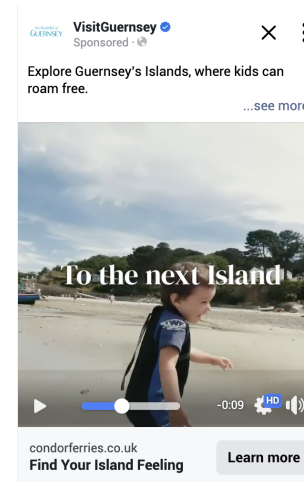
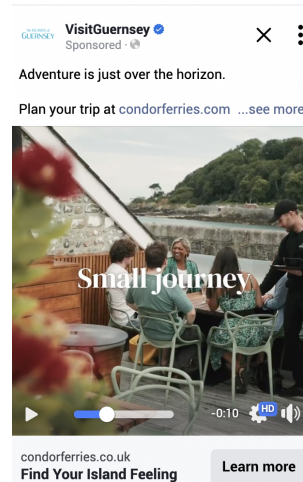
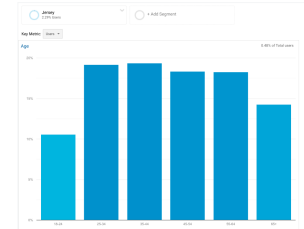
How do we reach them?

- VG will be investing in increased digital media - building on our 2023 learnings
- Plus looking to fund higher visibility co-funded campaigns - with carriers
- Condor Ferries advertising opportunities and other existing partner opportunities

Facebook Performance Data - Jersey campaign



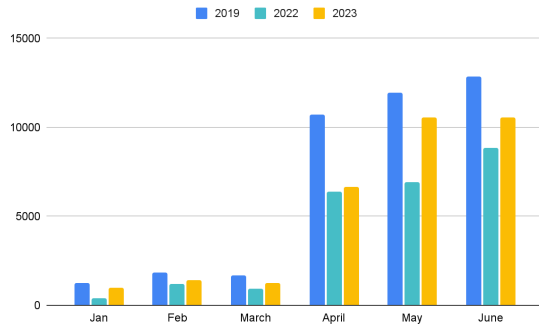
Website data - Jersey audience



The French market and opportunity

- Brittany and Normandy are becoming increasingly popular destinations to escape the South of France heat. The French are holidaying closer to Guernsey, we need to encourage them across
- **French routes remain a gateway to Europe.** Accom providers have reported increase in German/Belgium visitors, who are happy to drive Cherbourg to make the trip (Feedback from one campsite is that over past two years there has been a spike in visitors from Northern Germany, Belgium and Holland, due to Cherbourg link)
- During 2024, Parisians may be looking to escape during the Olympics (anecdotal from Paris-based French PR agent)
- We can tap into cultural opportunities
 - 80th anniversary of the D-Day landings (2024)
 - Renoir and Victor Hugo

We know there is an appetite from recent recovery figures and ID card trial.
Chart: Total passenger numbers inbound from France by commercial carriers



The French audience

Similar to the UK audience, we are targeting affluent 25-55-year-old couples and families, proven to have an interest based on our website data, in:

- Cultural holidays 55%, hiking holidays 57%, beach holidays 46% source: [Paris salon de tourisme](#))
- Who want to relax, recharge and escape the everyday - source travel reasons for consumers in France

Key locations - defined by key web locations

- Paris - 33% of 2023 web data
- Normandy - 10% of 2023 web data
- Brittany - 8.3% of 2023 web data

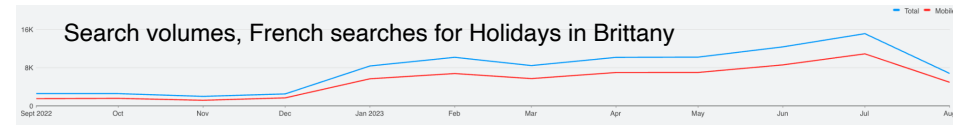
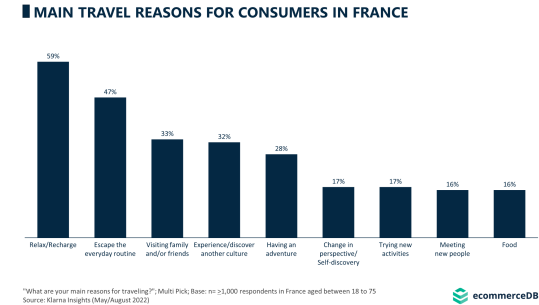
How do we reach them?

This year we have made a change to our French PR representation and, for the first time, invested in an outdoor media campaign in May across 142 individual sites. We then worked with carriers on co-funded campaigns to make investment go further. For 2024, we will be investing in:

- Paid search campaigns to increase website visibility and audience learnings
- A bespoke landing page with relevant French content, specifically raising the Victor Hugo connection
- French ambassador led content for PR distribution
- Dedicated Victor Hugo website
- Co-funded campaigns with our carriers / out of home digital billboard campaign using relevant and localised creative



Website 2023 data,
French Visitors



The French opportunity - 2024

80th anniversary of the D-Day landings (2024) and our links with Liberation Group Europe

The Islands of Guernsey are members of Liberation Route Europe

We are working in collaboration with the group, who are a transnational memorial - a trail connecting WWII remembrance sites and stories across Europe, including the Islands

Featuring in the official D-Day anniversary brochure

In 2023, we added a route, Liberation of Guernsey, to their website including relevant landmarks, forts, attractions featuring on their app

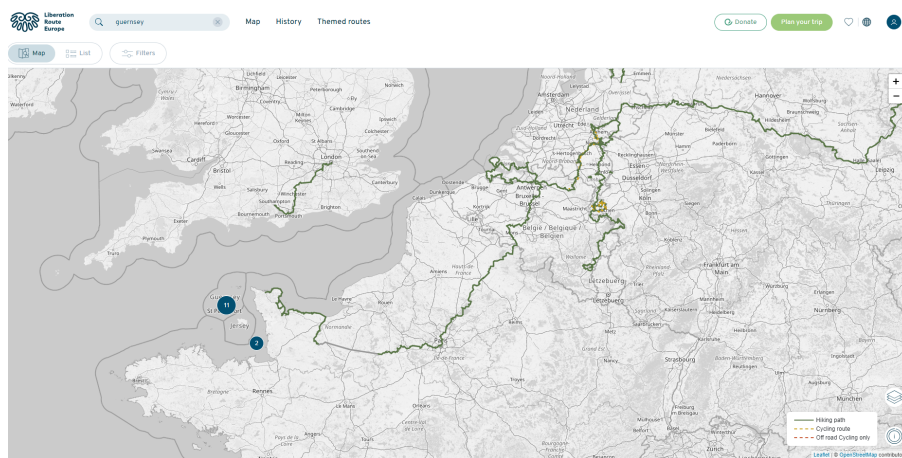
As part of a wider Heritage 80 project, ahead of the 80th anniversary of Liberation Day (2025) we are incorporating these sites on interpretation boards around the Island

The 'Europe Remembers' initiative is led by the LRE Foundation, which we can submit events to that would benefit from their Europe Remembers plan.

Working with partners to maximise the opportunity:

- French PR (plan/spend) - uplift in spend during 2024
- Carriers for co-fund campaigns
- Festung / Guides - new relevant on-island product, available in English/French
- Collaborating with regional French tourism offices

11 sites of interest are featured on the LRE website:



The combined 2024 media approach

supported by PR and trade activity

In summary

Digital

Display
PPC Google search
YouTube pre-roll
UK-wide around key departure points

Social

Organic social
Paid social
Instagram
Facebook
Twitter
Pinterest

Out of Home

Large scale OOH
Transit / Travel hubs
Supermarkets
Streets

Print

Affluent newspapers
Lifestyle magazines
Niche publications
& Geographical

TV

Regional VOD - hyper targeted
to affluent audience

Radio

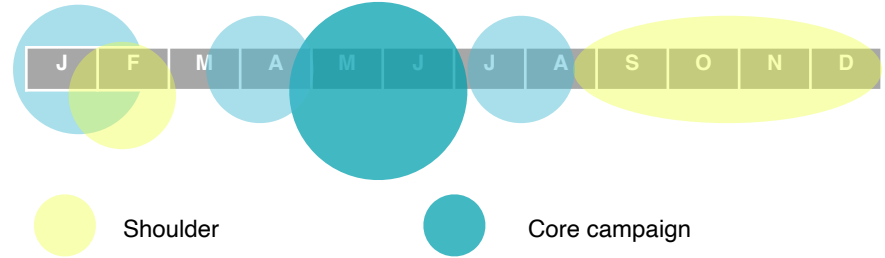
Regional radio
around
key departure
points
Online audio
streaming

PR

Influencers
Trade engagement
Press office



Peak campaign periods



Over the last two years we have strengthened engagement on our channels, seeing significant growth on our social channels and website.

Our results include

- Time spent on VG site is up 20.42% compared to website pre-refresh
- The bounce rate fell by 18.66%, showing increased relevance and engagement (pre and post site refresh)
- Significant 36.8% growth in social channels over three years
- Social ads have delivered 208% uplift in leads (Jan-Aug 2023 v 2022)

Understanding our impact

Our key strategic aims are:

1. Maintaining a younger and more affluent audience
2. Extending the duration of the average trip
3. Extending the season

Audience diversification and value

We have successfully diversified our audience appeal

- Our biggest segment used to be over 65

It is now:

- 55-64-years-old on the visitor survey
- and 45-54-years-old on our website

Visitors are spending more...

Our audience are spending in the higher tier categories (2023 visitor survey) 29% of respondents spent £1,500 or more on their trip.

During the 12 months from April 2019 - March 2020, the average spend in Guernsey, including travel and accomm, per visitor was £511.

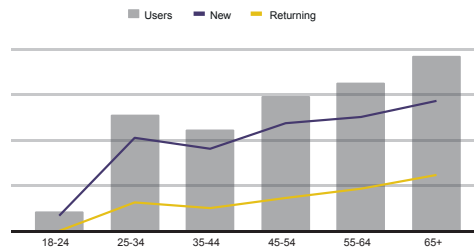
...and staying longer

Visitors are staying for longer - a 4.2 average night stay in Q2 2023 v 3.9 in Q2 2019 - (travel bulletin Q2 2023)

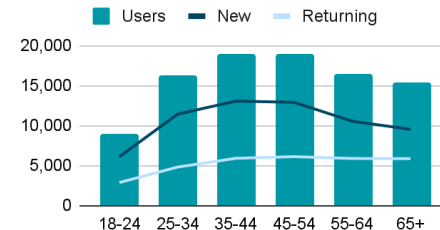
Extending the season

Industry data shows a provisional predicted occupancy for Sept at 78%. This compares to actual occupancy for Sept in 2019 at 73% and in 2022 at 71%. October provisional predictions are 54%, compared to 50% occupancy in 2019 and 48% in 2022.

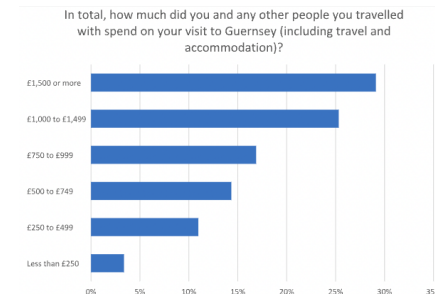
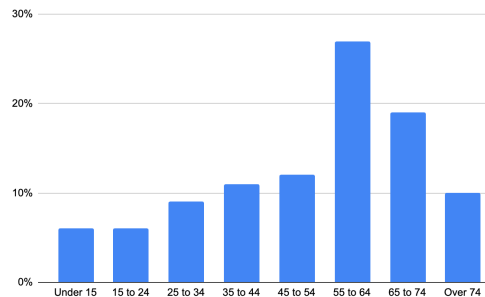
Website data 2019



Website data 2023



Visitor survey 2023



Understanding our data

Passenger arrivals v occupancy data

A disconnect in these figures, and why that is:

- weather (cruise ship/yacht visitors were down 46% in Q2 2023 v 2019 because a spell of bad weather in May which resulted in abnormally high cancellations)
- strategic changes by carriers / changes to timetables / loss of some routes resulting in a reduction of day passengers
- business travel (day trips) still in recovery and, due to a post-covid change in habits, may never return to previous levels

Table 5.2.1 Occupancy of open/available accommodation units

	2019	2020	2021	2022	2023
January	18%	24%	19%	21%	28%
February	29%	32%	13%	34%	35%
March	31%	17%	14%	*	39%
April	47%	6%	22%	*	56%
May	62%	4%	24%	64%	67%
June	76%	9%	30%	70%	81%
July	75%	18%	48%	77%	81%
August	75%	24%	56%	76%	79%
September	73%	26%	63%	71%	
October	50%	27%	48%	48%	
November	31%	25%	34%	33%	
December	26%	23%	27%	34%	

*There was a wave of cases of the Omicron variant of COVID-19, which impacted on the ability to collect full data in March and April 2022.

- occupancy data reports a % of open rooms. Capacity for 201 more people (of a total of 5,019) was temporarily removed during 2022 and 2023, but part or all of this capacity is expected to be added back in once refurbishments have been completed

	2019 /20	2020 /21	2021 /22	2022 /23	2023 /24
Maximum capacity (people)	5,055	4,854	4,863	4,938	4,818
Temporarily unavailable capacity e.g. closed for refurbishment	0	0	0	120	201
Total (including temporarily unavailable)	5,055	4,854	4,863	5,058	5,019

Understanding the key challenges - and how we respond

Late booking patterns

Late booking patterns are still causing nervousness in industry. Over the first six months of this year, 21% of visitors booked their accommodation less than 1 month before travelling

Encourage trade to offer-led early booking incentives

Summer months

As per 2022, August was a difficult month. The first half of the year Visitor Survey data (Jan - June) shows a more couple based visitor, something to monitor in Q3 data, which covers the main school holidays

By attracting multi-generational groups, we are hoping to re-engage with a younger family. Conduct research around comparative price points, particularly in accommodation.

Long stay extension

The effects of extending the long stay exemption until the end of 2024

Brexit and COVID Effect

French market recovery - changes to required ID for travel. An estimated 40% of the French population have a passport. It is hoped the ID card scheme will be extended to Sept 2024.

If applicable, include more direct messaging around the advantage of travelling on ID cards prior to Sept 2024 and the requirement for a passport, post Sept 2024.

Results from the exit survey demonstrate continued late booking trends throughout 2023:

When did you book your accommodation in Guernsey? (for those answering Holiday/Vacation/Break or Friends and Family)	
On arrival in Guernsey	1%
Less than 7 days before arriving	5%
7 to 13 days before arriving	6%
between 14 days and 1 month before arriving	9%
1, 2 or 3 months before arriving	46%
4, 5 or 6 months before arriving	24%
Over 6 months before arriving	10%

Creative updates

For 2024/2025 we will be evolving our authentic approach further - using ambassador content and local people where possible.

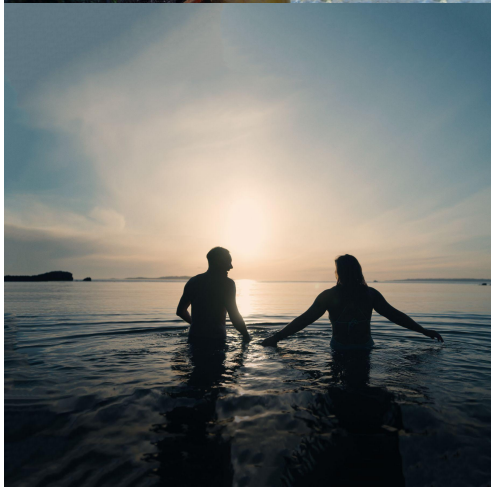
Our flexible approach gives us the ability to tap into trends and remain relevant to a quickly changing marketplace, as well as being reactive to opportunities that present themselves.

Production for 2024/ 2025 includes:

- History with a family focus
- French ambassador
- Food and food provenance
- Heritage 80

Supporting the creative will be:

- Bespoke French landing pages
- VG App development - beach/swimming guide added as a new layer in 2023. Heritage layer to be added in 2024, a series of new routes currently being developed.
- Move towards a more digital approach, reducing print offering, including the traditional printed brochure and increasing digital opportunities for trade partners



PR – highlights from 2023 to build on

Our key strategic aims for 2023:

- Wellness – raising the profile of the Islands as a wellness destination
- Island Games – supporting on Island presence, re-marketing to competitors, support teams and visiting spectators
- Renoir - working collaboratively with Art for Guernsey and Guernsey Museums to promote 'Renoir in Guernsey, 1883'.

Just for Renoir, the VisitGuernsey visiting journalist programme delivered:

- Engagement with more than 150 journalists
- More than 80 pieces of coverage, including print, digital, social, radio and TV, to UK and French audiences
- Coverage with a PR value of £514,770 - the advertising value equivalent of £171,590
- In addition, we arranged a number of Guernsey and London based events targeting art and culture specific journalists in the lead up to the opening of the exhibition



PR – strategic aims for 2024

Key focuses for 2024:

- 80th anniversary of the D-Day landings (2024) (UK/French PR). Including our links with Liberation Group Europe. Focusing on putting Guernsey on the radar to both the UK and French audiences, and those travelling to Normandy from further afield
- Heritage / History, ahead of the 80th anniversary of Liberation Day (2025).
- Wellness – continuing to pitch ourselves as a wellness destination, to a younger demographic
- Food – sustainability/provenance, putting local food in front of visitors wherever possible and using it as a hook to attract visitors over
- Cultural links – building on the awareness-raising from Renoir, maintaining our profile as a cultural destination, working collaboratively with Art for Guernsey and Guernsey Museums
- Working with carriers to support new routes in both UK and further afield



What we need from trade

Understand the shift in our audiences

- Does their offering match our new target audiences?
- What are they doing to proactively market to them?
- How can we help?

Better align their offering with our short and longer term strategic aims

Engage with VisitGuernsey

- Use VG assets to help **our** advertising go further
- Engage in partnership packages - we will be identifying key areas for revenue generation from trade from low level inclusion such as website listings to media opportunities on our channels including hero features and social media, to bespoke partnership packages, with tailored content

Open and read trade mailer

Compared to an average email open rate of 21.5%, ours are strong - but this is the number one way we engage with trade

- October trade mailer open rate - 43.70%
- Click through rate - 13.22%

Regularly engage with the trade site - stay up to date with the latest industry news

Engage in a common goal

- Ensuring the best possible visitor experience.



A photograph taken from inside a dark cave, looking out through a jagged opening. The scene outside is bright and clear, showing a vast blue ocean under a clear sky. In the foreground, the silhouettes of a man and a woman are visible, looking out towards the sea. The woman is on the left, and the man is on the right. The cave's interior is mostly black, with some texture visible on the rock walls. The text "Thank you" is centered in the middle of the image, overlaid on the view of the ocean.

Thank you