

Niche Audience Research 2022

The ISLANDS of
GUERNSEY

Targeting Niches: Introduction

As part of the 2022 Visit Guernsey strategy, we have identified a number of niche markets that transcend our traditional audience segmentation, and connect through clear targeting opportunities.

By focusing on niches, we can be clearer with our targeting approaches, and work with partners to create more meaningful engagement and content that will create a clear connection between audience and niche activity / type.
This research document is intended to identify niche behaviour and consumer demand.

Niches give us the opportunity to build interest across the year, in addition to main tourism offering.

Niches

Wellness

- Outdoor Activities
- Hiking
- Wild Swimming
- Paddleboarding/Water

Birdwatching (Wildlife Tourism)

Fishing

Weddings

LGBTQ+

Corporate Retreats

A group of people are gathered around a campfire at sunset. A man in a dark beanie and glasses holds a white mug. A woman in a grey beanie and sweater smiles while holding a silver thermos. Another person's arm is visible on the right, also holding a thermos. The scene is set on a beach with the ocean in the background. The word "Wellness" is overlaid in white serif font.

Wellness

Wellness

This trend is not about 5* spa offering, but the simplicity of fresh air, something we can indeed deliver on.

McKinsey's latest research shows that consumers care deeply about wellness. In a survey across 7,500 consumers in six countries, 79% said they believe that wellness is important, and 42 percent consider it a top priority. With a substantial increase in the prioritization of wellness over the past two to three years.

<https://www.mckinsey.com/industries/consumer-packaged-goods/our-insights/feeling-good-the-future-of-the-1-5-trillion-wellness-market>

Demand for wellness retreats has seen a huge spike with a 1,605% increase in the last five years.

<https://www.traveldailymedia.com/wellness-retreats-sees-surge-in-popularity-as-brits-look-for-post-lockdown-getaways/>

"The travel industry has the opportunity to benefit immensely from the high interest in making wellness part of the overall holiday experience, with beauty/spa treatments, physical activities and meditation being in high demand. Post-pandemic, more wellness travellers are keen to opt for nature-based wellness experiences, while the combination of relaxing and physical activities will grow in popularity."

– Narmada Sarvanantha, Leisure and Travel Analyst



The Audience



54% female

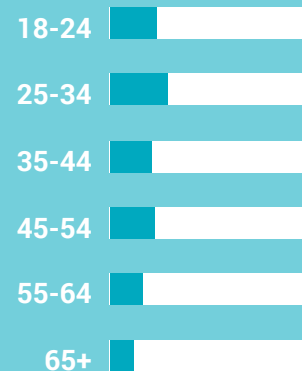


23% 25-34 age



72% non-parents

Age



40% of millennials said that they prefer going on a fitness retreat with their favourite instructor than spending time in a five-star resort

<https://runrepeat.com/wellness-tourism-industry>

Audience Opportunity

36,000,000 people with an interest in wellness can be reached on Facebook



Audience size for everyone with interest in wellness in the UK.



10BN available weekly impressions through Google - People who searched/browsed wellness related content

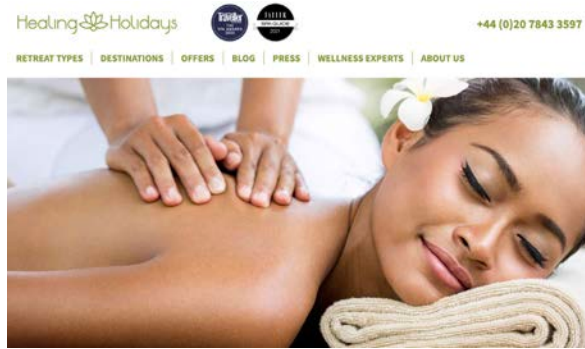
11,740 avg. monthly searches - wellness, wellness holidays.



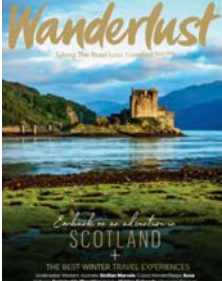
3.3m potential reach on TikTok

Wellness

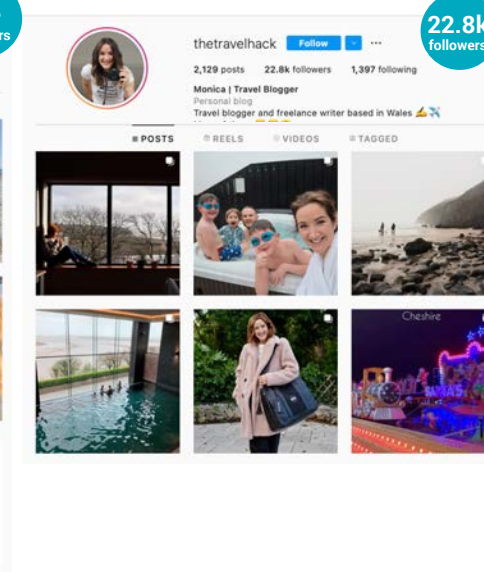
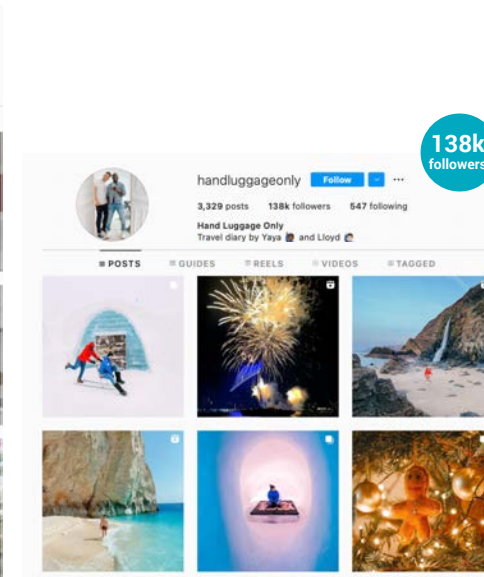
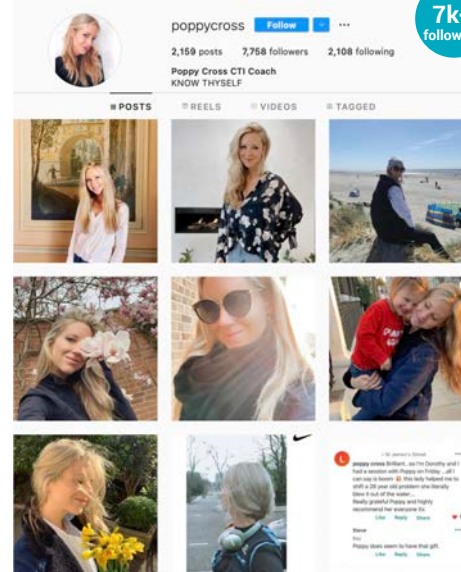
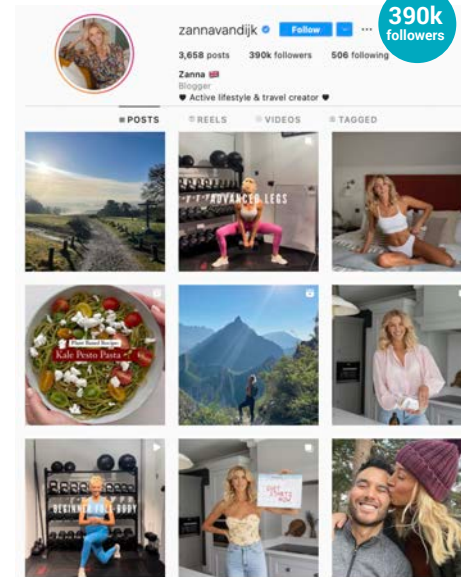
Online Publications



Publications (General & Travel)



Influencers



A person is captured mid-jump, falling from a dark, layered rock cliff into the ocean. They are wearing a grey helmet with a blue logo, a red life vest over a grey long-sleeved shirt, and black wetsuits with 'RHINO' written on the leg. Their arms are outstretched, and their legs are in a wide, jumping position. The ocean is a deep blue-green with white foam from the waves. In the background, a grassy cliffside and a small building are visible under a cloudy sky.

Wellness: Outdoor Activities/Pursuits

Wellness: Outdoor Activities/Pursuits

In a survey of consumers in seven countries – UK, France, Germany, Spain, Italy, Poland, Sweden – 70% of respondents stated that they are specifically looking forward to participating in outdoor activities after lockdown eases. While 86% stated that outdoor activities are essential for people's wellbeing.

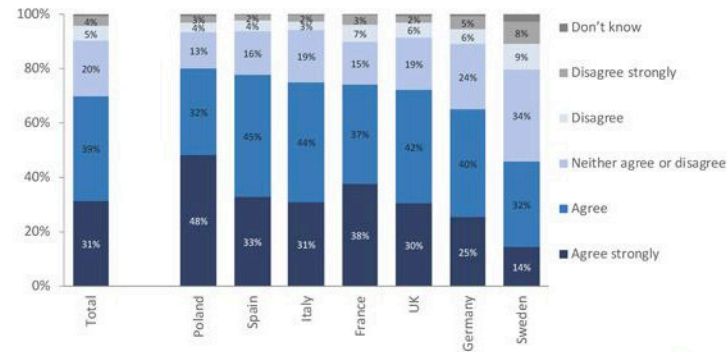
<https://myoutdoors.co.uk/industry-news/new-research-reveals-greater-public-appetite-for-outdoor-activities-after-covid>

43% of participants first participated in their main outdoor activity with parents/guardian/family - biggest influences in attracting new participants to outdoor activity.

https://sportengland-production-files.s3.eu-west-2.amazonaws.com/s3fs-public/outdoors-participation-report-v2-lr.pdf?VersionId=_2SJK6Ube9RCSPcrYJD5vxFnGzBSiO5M

Pent up demand: 70% are looking forward to more outdoor activities post COVID-19

Thinking about how the COVID-19 pandemic has impacted your outdoor activities how much do you agree or disagree with the following statement? - "I am looking forward to doing more outdoor activities as a priority when restrictions end."



Source: Foresight Factory | Base: 1000 respondents per country, 2020



The Audience



54% female



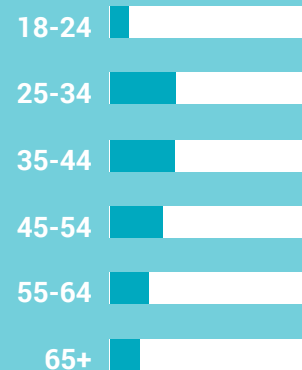
25-34

24% 25-34 age



56% non-parents

Age



Consumers are increasingly seeking out alternative destinations, rural areas, nature-based destinations and outdoor activities. American Express research found that over half of consumers are more likely to take an outdoor trip now than before the pandemic and 47% want their next trip to be in nature.

<https://leisurelab.eu/lab-reports/sustainable-living/ecotourism/break-even-tourism/long-stay-tailored-outdoor-what-travellers-want-in-2022>

Audience Opportunity



28,200,000 people with an interest in outdoor sports can be reached on Facebook



5BN available weekly impressions through Google - People who searched/ browsed outdoor sporting content

37,920 average monthly searches



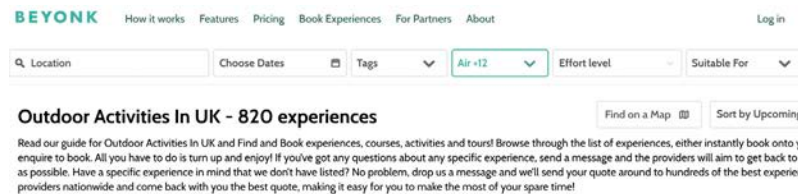
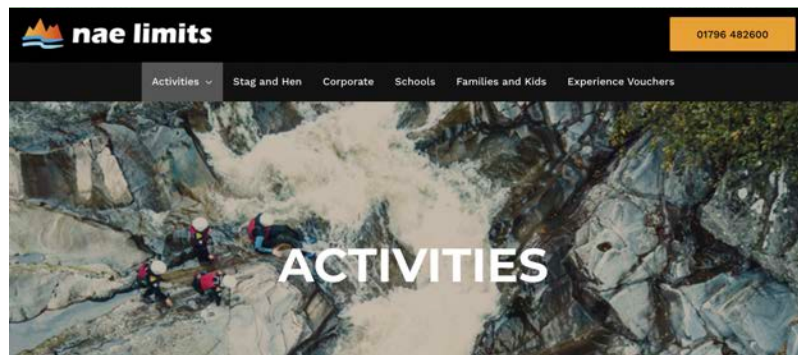
34.8k potential reach on TikTok

Wellness: Outdoor Activities/Pursuits

Online Publications



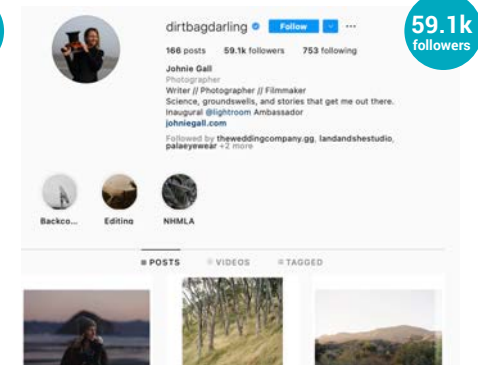
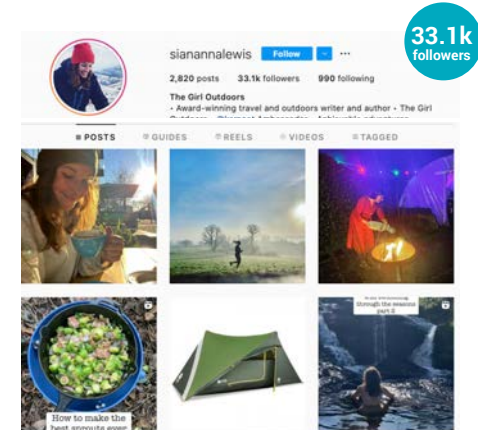
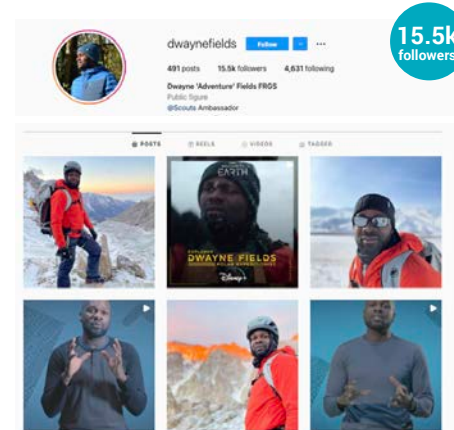
Choose your Day Out



Publications



Influencers



Wellness: Hiking

A high-angle photograph of a dirt trail winding through a dense, green, hilly landscape. Two hikers are visible on the trail, moving away from the camera. The vegetation is thick and appears to be a mix of ferns and other low-lying plants. The lighting is bright, suggesting a sunny day. The overall scene conveys a sense of nature and outdoor activity.

Wellness: Hiking/Walking

A quarter (24%) of 16-24s are ramblers, up from 16% in 2018.

28% of adults are interested in taking a walking holiday, with 12% in interested in taking a cycling holiday in the future.

Participation in walking for leisure in England increased by 18% between May 2020 and May 2021, reaching 24.0 million adults.

<https://www.mintel.com/press-centre/leisure/these-boots-are-made-for-walking-nearly-a-quarter-of-brits-are-hikersramblers>

People have been coming to Pinterest for inspiration, for making sure they're fully equipped for their treks. Searches for "hiking equipment" have increased by 38% in the last 12 months, while "hiking outfit" has jumped by 44%. People are using the platform to plan ideas for their routes – searches for 'walking trails' have leapt by 50%," Source: Pinterest

<https://www.theguardian.com/lifeandstyle/2019/jul/14/hiking-walking-younger-generation-ramblers>



The Audience



57% female

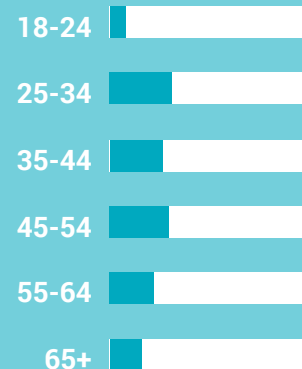


23% 25-34 age



64% non-parents

Age



Audience Opportunity



8,300,000 people with an interest in walking / hiking can be reached on Facebook



500m available weekly impressions through Google - People who searched/browsed walking / hiking content

4,360 AV. monthly searches - walking / hiking



2.8m potential reach on TikTok - hiking

549.8k potential reach on TikTok - walking

Wellness: Hiking/Walking

Hiking/Walking Media Coverage



The Ramblers, the UK walking charity best known for attracting an older demographic, counts more than 50 groups nationwide for people in their 20s and 30s – and they are growing rapidly; the Glasgow Young Walkers' membership increased by 28% at the start of 2019 and the Stag Walkers' (covering Hertfordshire, Bedfordshire and Cambridgeshire) by 14% in the same period. By contrast, there are just 40 groups for walkers over 40.

"People have been coming to Pinterest for inspiration, for making sure they're fully equipped for their treks," says Larkin Brown, a spokesperson for the social media network. Searches on Pinterest for "hiking equipment" have increased by 38% in the last 12 months, while "hiking outfit" has jumped by 44%.

"People are using the platform to plan ideas for their routes – searches for 'walking trails' have leapt by 50%," adds Brown.

<https://www.theguardian.com/lifeandstyle/2019/jul/14/hiking-walking-younger-generation-ramblers>

Hiking/Walking Top Websites

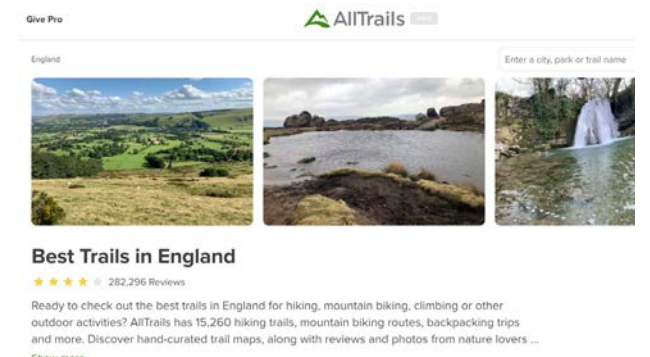
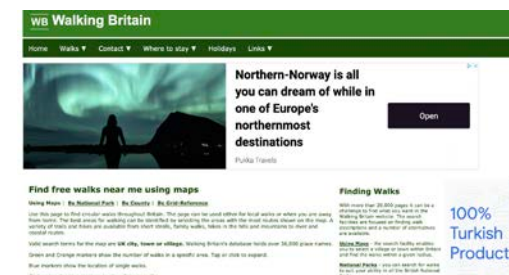
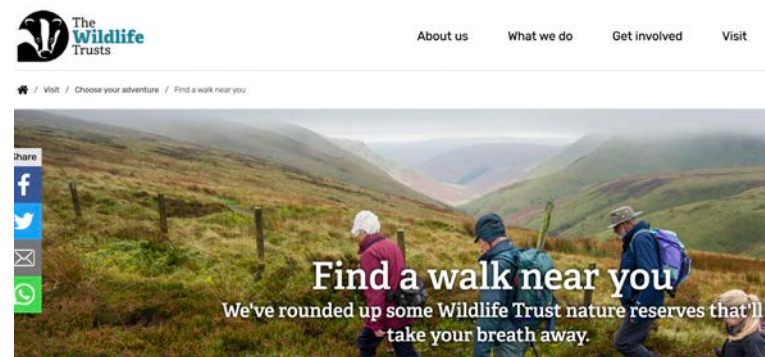
Is that a unicorn? No, it's a teenager taking a hike in the great outdoors...



Snowdon and Scafell will be busy this year, but our pick of lesser-known routes should be as empty as ever by Kevin Rushby

In a densely populated country like Britain, finding somewhere to walk alone is never straightforward, but there are places that rarely see humans, and footpaths that have no footprints, often surprisingly close to towns and villages. There is nothing quite like passing an entire day of walking without seeing a single soul, never being called upon to utter greetings. When mental health is in the spotlight and the dangers of isolation are constantly reiterated, it's good to mention that time alone can also be beneficial, even essential.

Many years ago on top of Scafell Pike, after a day spent in thick mist without encountering anyone, I bumped into another solo hiker. As we passed I said, "Hello," but he did not reply, just glared. I was young then, and only now do I realise how inappropriate my talkativeness was; an eyebrow twitch would have been adequate.

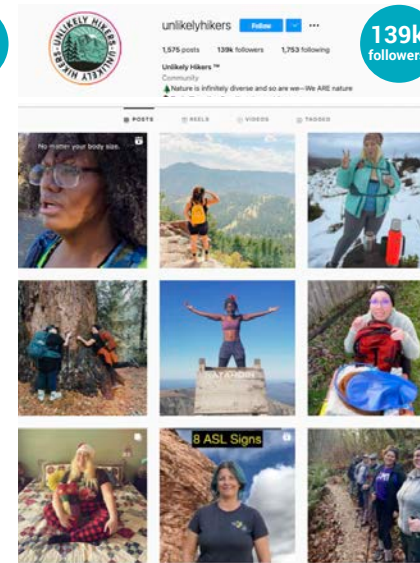
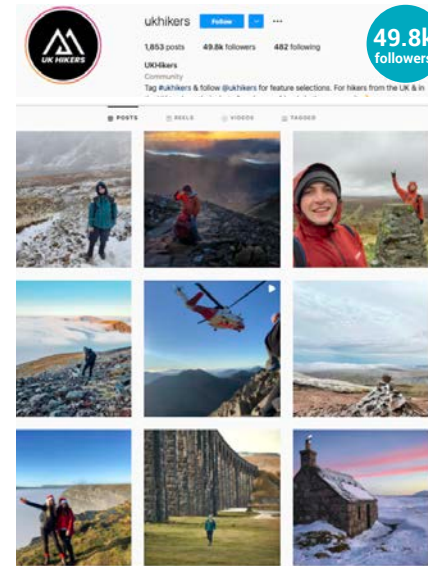


Wellness: Hiking/Walking

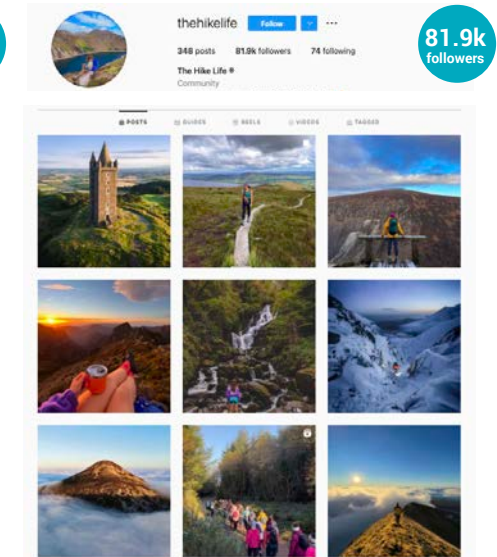
Publications



Bloggers & Influencers



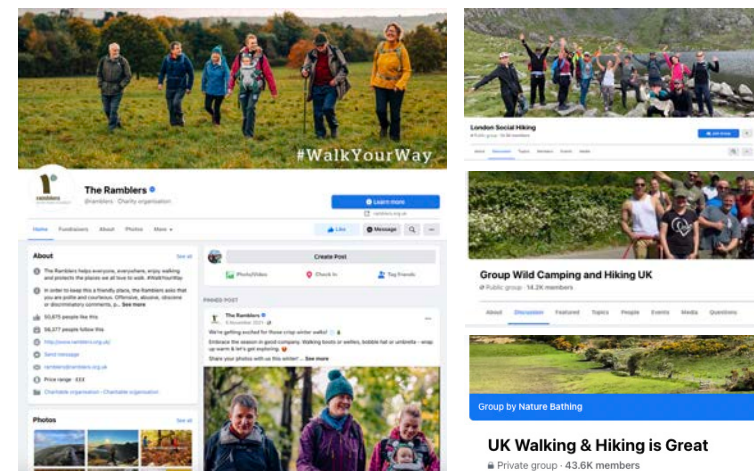
Dublin Hikers (Route Integration)



Tapping into charities and organisations



Facebook Communities



Wellness: Outdoor/Wild Swimming



Wellness: Outdoor/Wild Swimming

Membership to the Outdoor Swimming Society grew by a third in 2020. Swim England counted 2.1 million people who prefer to swim in open water in 2019; a report by Outdoor Swimmer suggested that participation may have increased by between 1.5 and three times.

Nell Frizzell, who worked as a lifeguard at the women's pond, points out that urban dwellers are more alienated from nature than perhaps ever before.

<https://www.theguardian.com/lifeandstyle/2021/sep/19/in-at-the-deep-end-the-activists-plunging-into-the-wild-swimming-campaign>

"They travel to work on a bus, they sit at a computer all day, they live in a small flat with no garden, they buy their food in supermarkets, there are no trees on their street, they have never grown food, they do not recognise birdsong, they miss entire seasons," she says. "We are not built to live that way. Of course we're not. And so, I believe, a latent hunger for something – anything – that feels like the outdoors world pulls us to ponds, to rivers, to the sea."

<https://www.theguardian.com/commentisfree/2020/jan/29/swimming-wild-trend-social-media-cliche>



The Audience



53% female

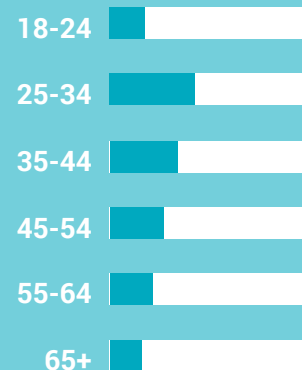


26% 25-34 age



57% non-parents

Age



Audience Opportunity



5,900,000 people with an interest in wild swimming can be reached on Facebook



500m available weekly impressions through Google - People who searched/browsed sea swimming related content

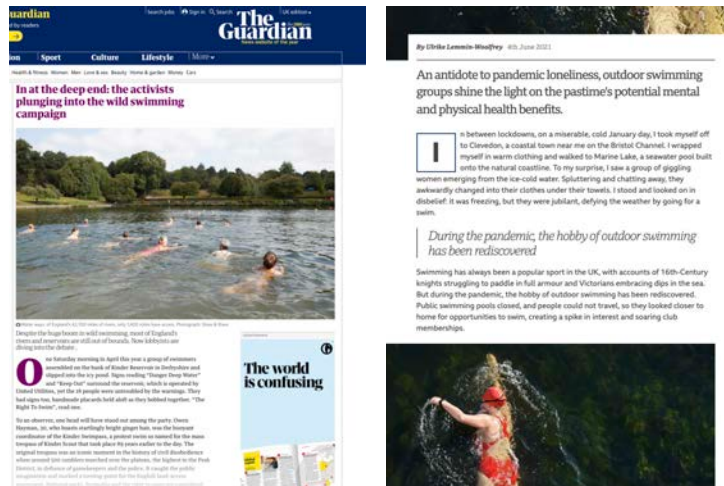
87,500 avg. monthly searches - wild swimming



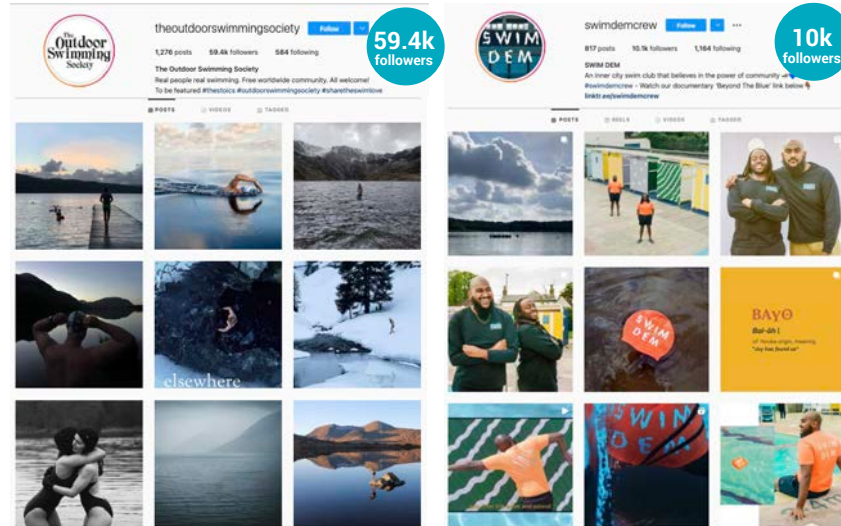
8.6m potential reach on TikTok

Wellness: Outdoor/Wild Swimming

Media Coverage



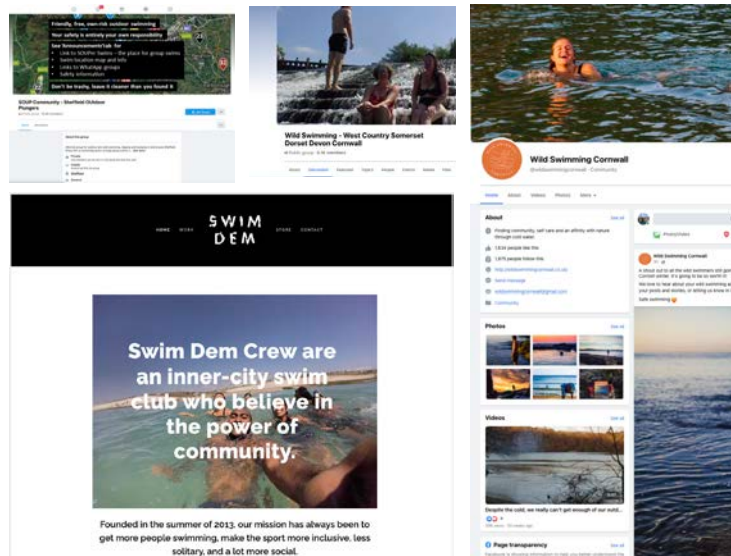
Influencers



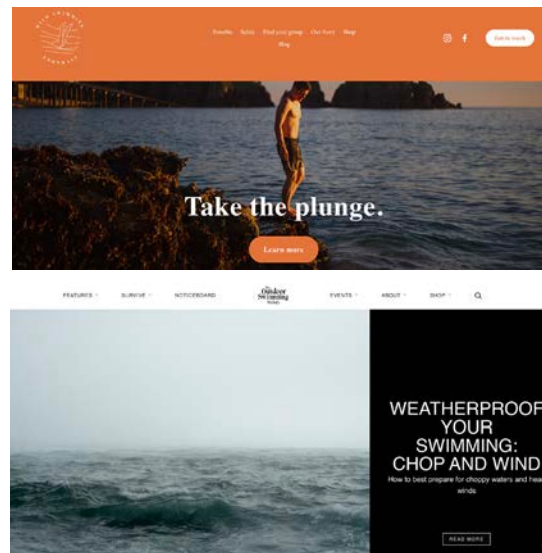
Publications



Facebook Communities



Websites & Blogs



Wellness: Kayaking/Water Activities



Wellness: Kayaking/Water Activities

Over 20.5 million people annually take to the water doing a paddle sport, and the activity represents almost half (45%) of the economic contribution of wider tourism expenditures associated with the boating and watersports sector in the UK.

<https://www.britishmarine.co.uk/News/2021/July/Spending-time-on-the-water-can-be-a-perfect-prescription-to-improve-health-and-wellbeing>

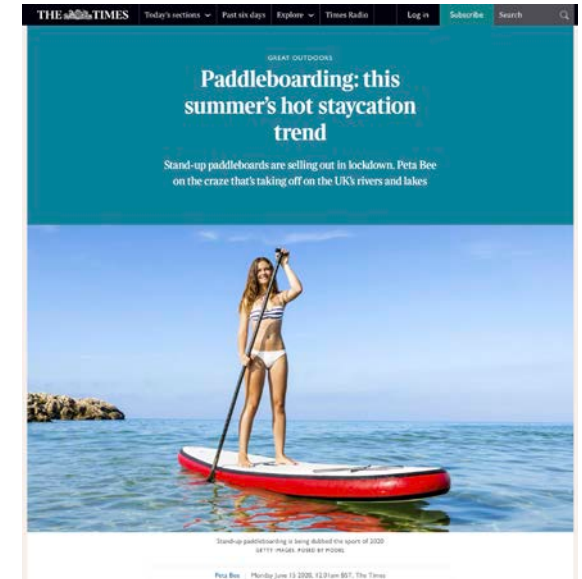
Paddleboarding has been growing in popularity for a few years. According to the Watersports Participation Survey, together with surfboarding and bodyboarding, it recorded the highest increase in participation of all water sports, rising from 502,000 in 2008 to almost 1.4 million in 2018

<https://www.thetimes.co.uk/article/paddleboarding-this-summer-hot-staycation-trend-s83vxt6hx#:~:text=Paddleboarding%20has%20been%20growing%20in,almost%201.4%20million%20in%202018.>

BOATING TRENDS



<https://mymembership.britishmarine.co.uk/media/mahdxukz/9e9020bd-268c-437b-aa9f-d628df5668fc.pdf>



The Audience



51% male

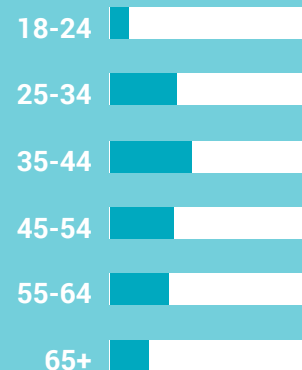


24% 35-44 age



58% non-parents

Age



Audience Opportunity



4,100,000 people with an interest in wild swimming can be reached on Facebook



5BN available weekly impressions through Google - People who searched/browsed kayaking related content

181,400 avg. monthly searches - kayaking

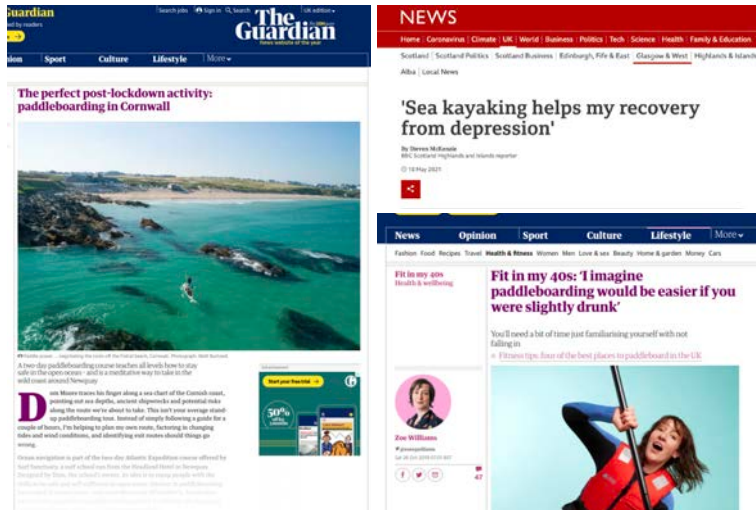


2280 potential reach on TikTok - kayaking

647 potential reach on TikTok - water sports

Wellness: Kayaking/Water Activities

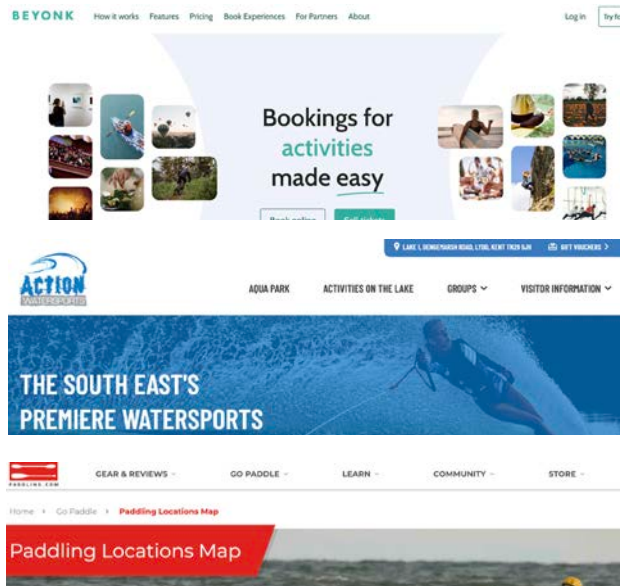
Media Coverage



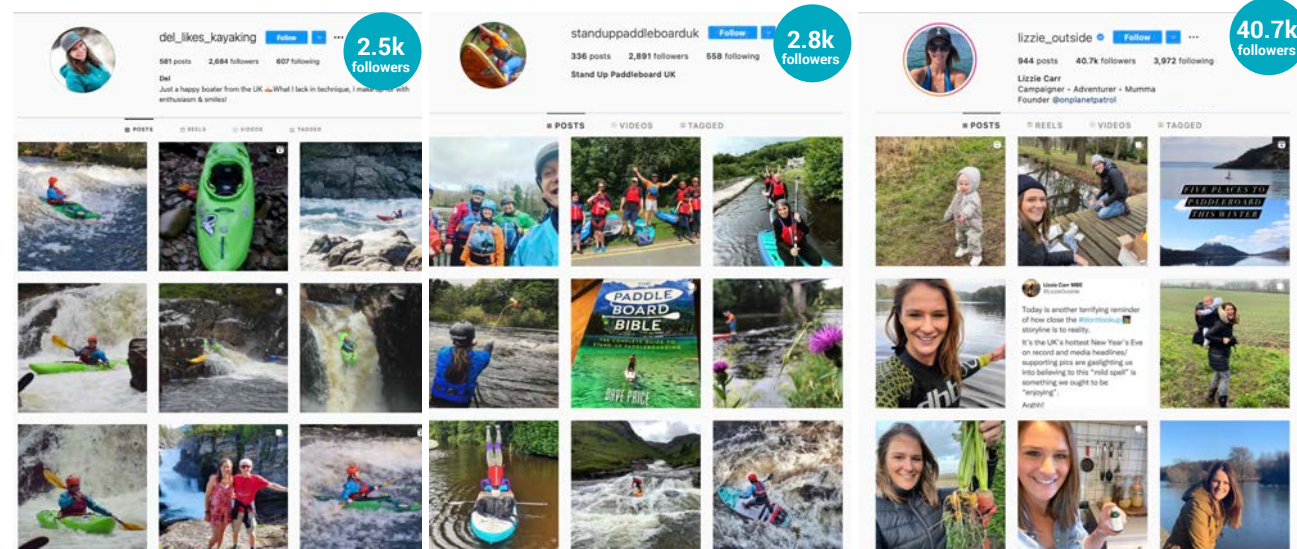
Publications



Websites



Influencers



Birdwatching



Birdwatching

Specialist niche that falls under wildlife tourism. At least 20% of European travellers that engage in wildlife tourism are interested in birdwatching activities as well.

<https://www.cbi.eu/market-information/tourism/birdwatching-tourism/market-potential>

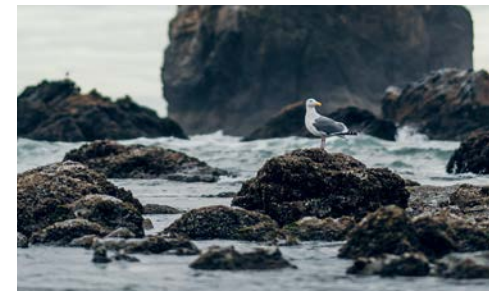
Results from a new survey commissioned by the RSPB have revealed the pandemic is making the public more aware of nature in their local area, with 41% seeing wildlife near their homes over the last 12 months that they had never noticed before.

The YouGov survey of 2,071 adults across the UK revealed 63% of people said watching the birds and hearing their song added to their enjoyment of life since the onset of the Covid-19 pandemic, with more than half of those surveyed (51%) believing the pandemic has made them more aware of the nature around them.

<https://www.rspb.org.uk/our-work/rspb-news-original/news/stories/birdwatch/>

Globally, around three million international trips are dedicated to birdwatching every year. Birdwatching tourism has been a rapidly growing market, with the largest share coming from Europe

<https://www.cbi.eu/market-information/tourism/birdwatching-tourism/market-potential>



The Audience



57% female



26% 35-44 age

Parental Status

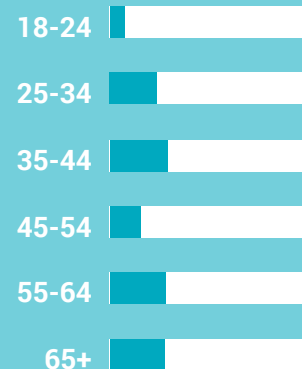
Parent



Non-Parent



Age



Audience Opportunity



814,400 people with an interest in bird watching can be reached on Facebook



100m available weekly impressions through Google - People who searched/browsed bird watching related content

12,100 avg. monthly searches - bird watching



4231 potential reach on TikTok

Birdwatching

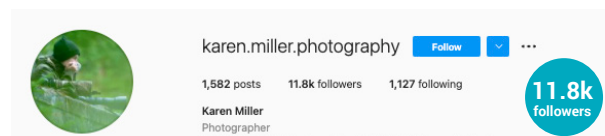
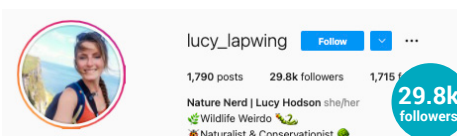
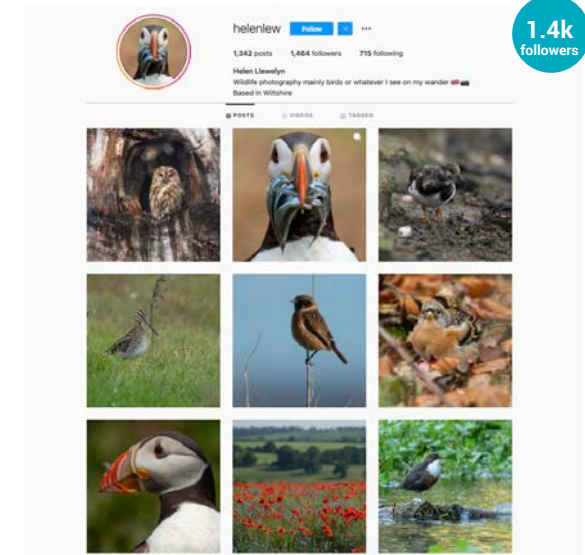
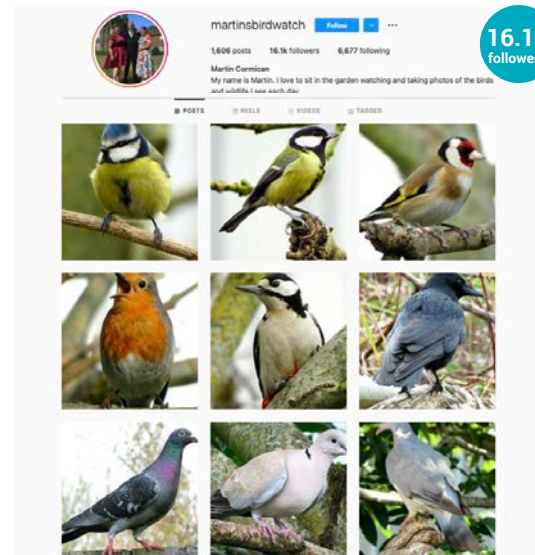
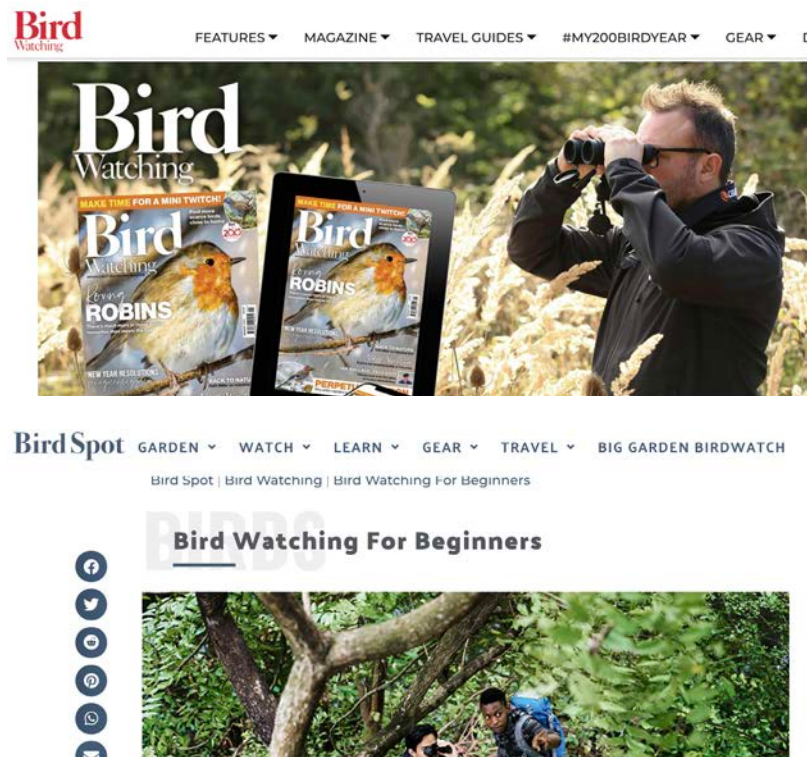
Online Publications



Publications



Influencers



Fishing



Fishing

In 2020 The Environment Agency (UK) revealed that over 100,000 more people were fishing, with a boom in rod licence sales by nearly a fifth (17%) compared to the same time the previous year.

There are currently over 3/4million anglers with a licence in England and Wales. In light of renewed demand and the wellbeing benefits of fishing, the Environment Agency has set a new target to get one million people fishing by 2025.

More beginners are also taking up the sport as nearly half (42%) of respondents reported taking someone from their family along with them to try fishing for the first time.

<https://www.gov.uk/government/news/were-hooked-people-across-england-flock-to-fishing-hotspots-to-enhance-post-lockdown-wellbeing>

"We've seen record numbers of people take up fishing since lockdown, many of whom are completely new to the activity and some of whom have taken up the sport through family members and friends at local clubs."

John Ellis, National Fisheries and Angling Manager at the Canal & River Trust market-potential



The Audience



71% male

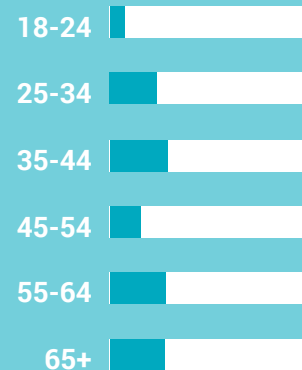


22% 35-44 age



59% non-parents

Age



Audience Opportunity



11,600,000 people with an interest in fishing can be reached on Facebook



5BN available weekly impressions through Google - People who searched/browsed fishing related content

40,500 avg. monthly searches - fishing



115.1m potential reach on TikTok

Fishing

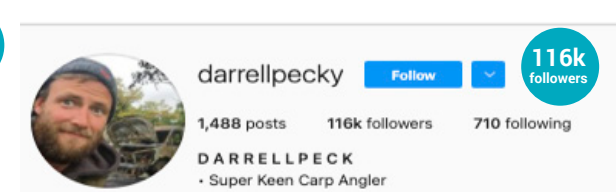
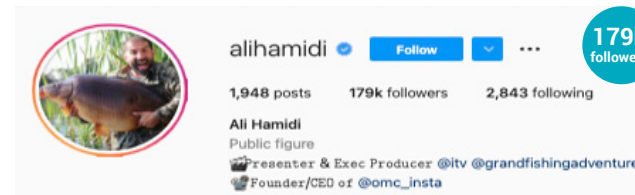
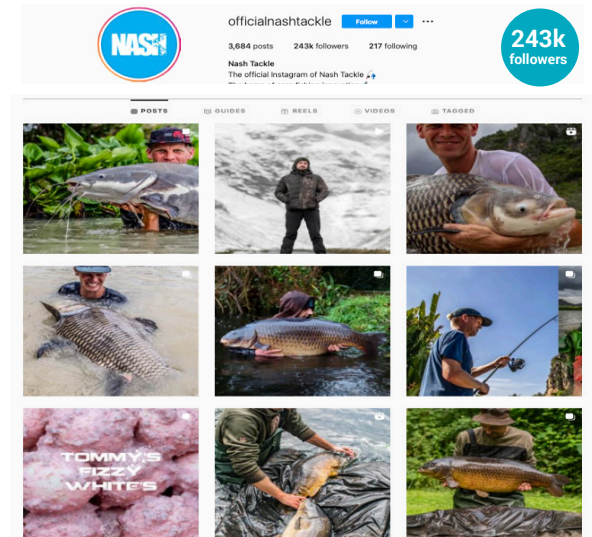
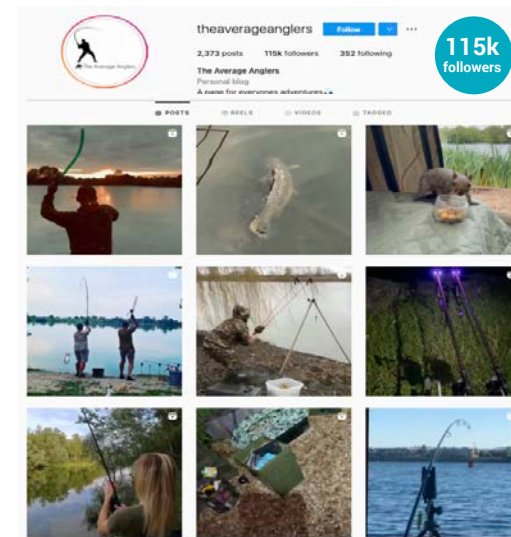
Online Publications



Publications



Influencers



Weddings



Weddings

Wedding suppliers and venues interviewed are already seeing substantial enquiries for 2022 and 2023 along with a substantial backlog of 2020 weddings still to be rebooked, all of which means that we are seeing extremely limited availability of suppliers and reduced choice for wedding couples now starting to plan a 2022 wedding day.

Much of the wedding industry has already or is planning to increase pricing for 2021/22 onwards, with the overall price of a wedding set to increase by an average of 15-20%.

<https://harnessandco.co.uk/much-of-the-wedding-industry-has-already-or-is-planning-to-increase-pricing-for-2021-22-onwards-with-the-overall-price-of-a-wedding-set-to-increase-by-an-average-of-15-20#page-content>

Guernsey is in a unique position by being able to wed anywhere, unlike England.

With everyone spending more time outside during the pandemic, a newfound appreciation of nature is likely to influence 2022 wedding decor as couples focus on the environment.

https://www.huffingtonpost.co.uk/entry/7-wedding-trends-youre-likely-to-see-in-2022_uk_61123fd9e4b034426d4f104e



After a year of missing human connection and celebration, couples are focusing on joy more than ever. The formality of even the most lavish weddings will be slightly pared down in the year ahead. Black tie weddings will still be around in 2022, but an increase in festive, casual experiences will see a rise. Think dance parties, cocktail-style receptions and food truck celebrations"

<https://www.theguardian.com/commentisfree/2020/jan/29/swimming-wild-trend-social-media-cliche>

The Audience



60% female

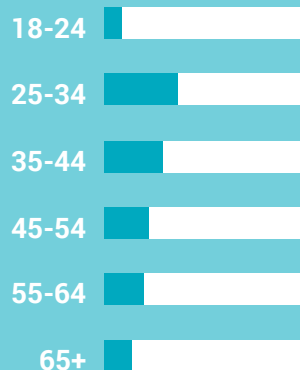


22% 25-34 age



62% non-parents

Age



By looking at how search behaviour has changed in the last 3 months, we see that more people are searching for all inclusive wedding packages (88% increase)

| Keyword | 3 Month Change (%) |
|--|--------------------|
| Destination wedding | 21% |
| Destination wedding packages | 23% |
| Lake como wedding venues | 50% |
| Algarve wedding venues | 50% |
| Jamaican wedding venues | 24% |
| Wedding venues lake como | 24% |
| All inclusive wedding packages with accomodation | 88% |
| European wedding destinations | 21% |
| Beach wedding destinations | -18% |
| Beautiful wedding places | -29% |

*November, end of December, January, August - peak times

Audience Opportunity



1,500,000 people with an interest in weddings can be reached on Facebook



5BN available weekly impressions through Google - People who searched/browsed wedding content

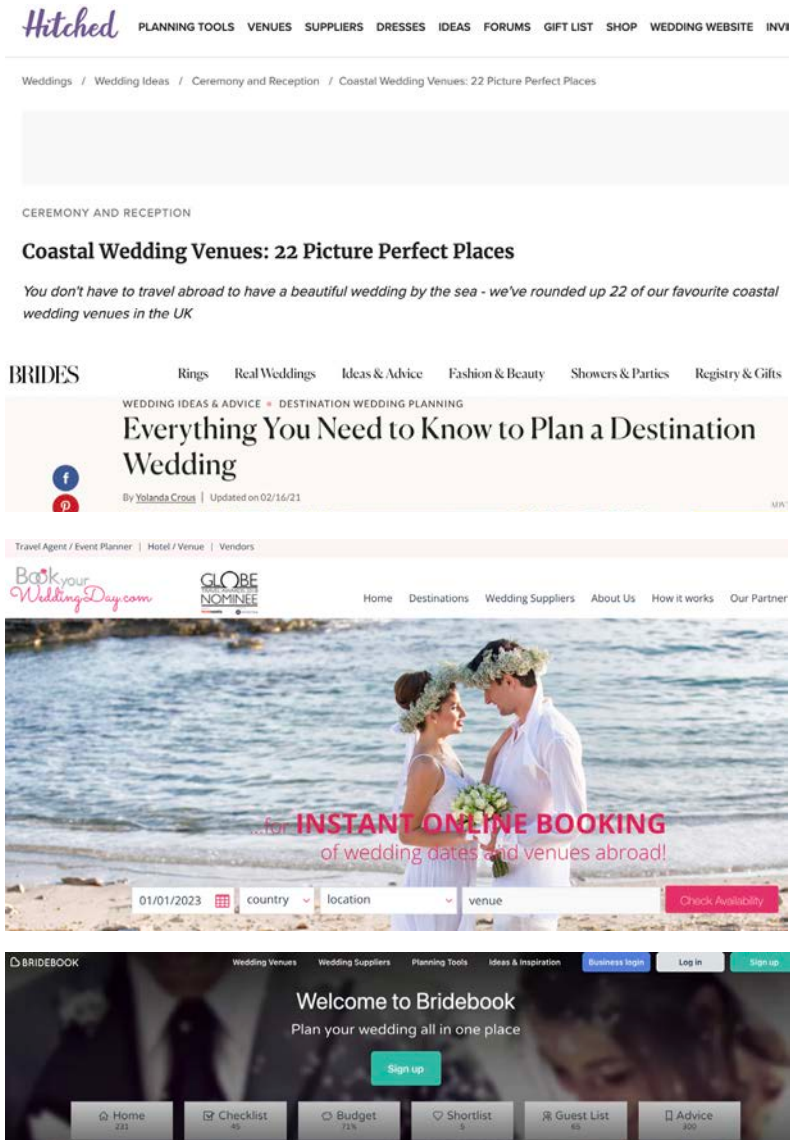
16,200 avg. monthly searches



400.5k potential reach on TikTok

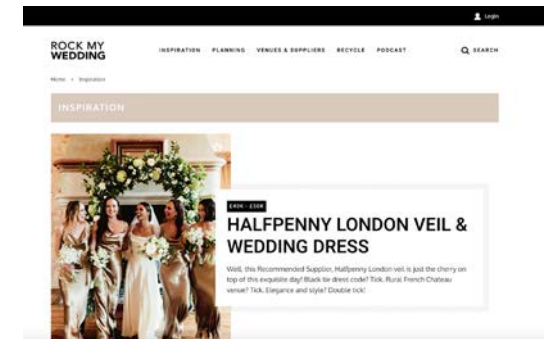
Weddings

Online Publications



Bloggers/Influencers

lovemydress.net
lovemydress.net/blog/wedding_style/seaside-and-beach-weddings
bohowseddings.com/
bridalmusings.com/
brideandtonic.com/
english-wedding.com/
gayweddingblog.co.uk/
marrymeink.co.uk/
nubride.com/
rockmywedding.co.uk/
rocknrollbride.com/
un-wedding.com/
wantthatwedding.co.uk/



Wedding Events

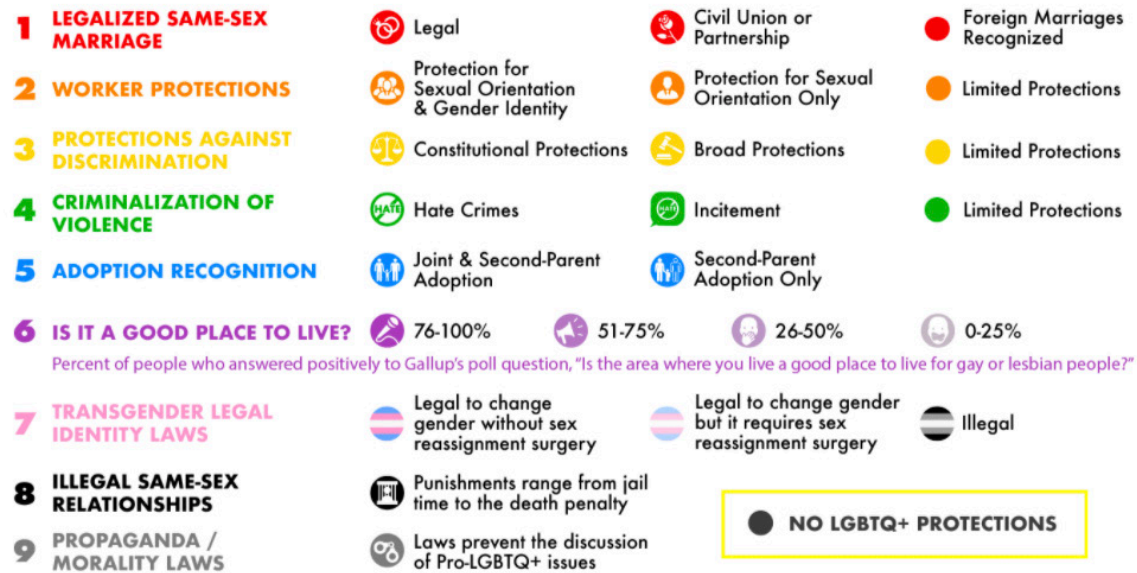
The Top 10 Wedding Shows in the UK
 The National Wedding Show.
 The Scottish Wedding Show.
 The Gay Wedding Show.
 The North West Wedding Show.
 Bride Magazine Wedding Shows.
 The South of England Wedding Fair
 The Midland Wedding Show.
 The Un-Wedding Show.





LGBTQ+

LGBTQ+



The Audience

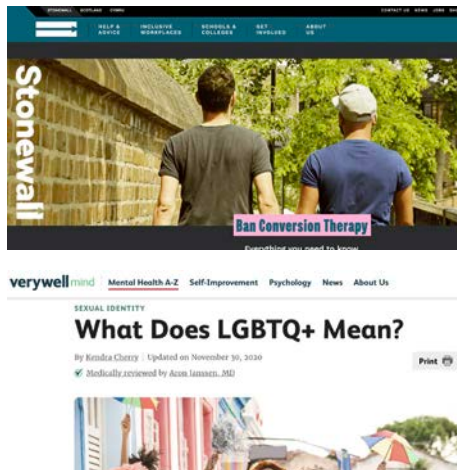
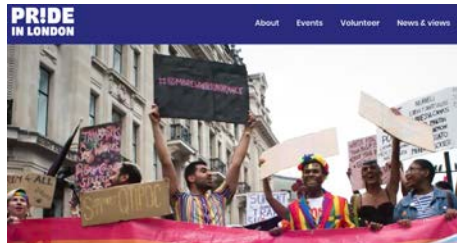
Audience Opportunity

- 8,400,00 people with an interest in LGBTQ community & events can be reached on Facebook
- 5BN available weekly impressions through Google - People who searched/browsed LGBTQ community content
- 43,630 avg. monthly searches
- 691.2k potential reach on TikTok

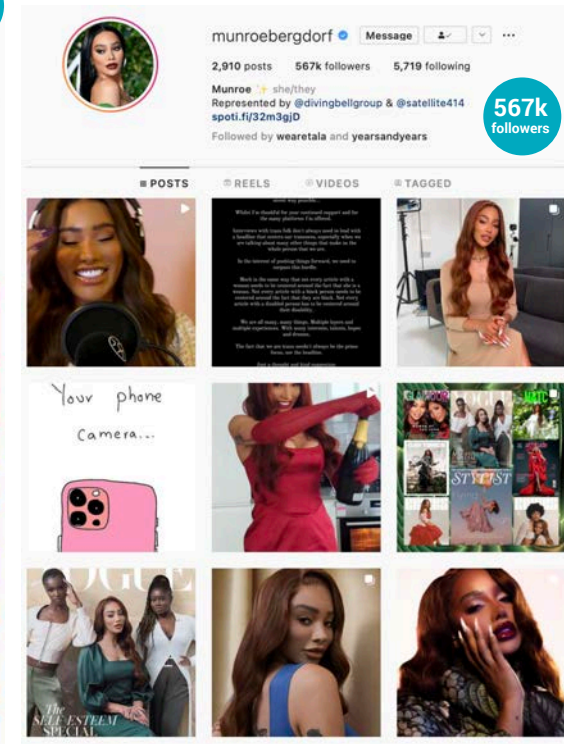
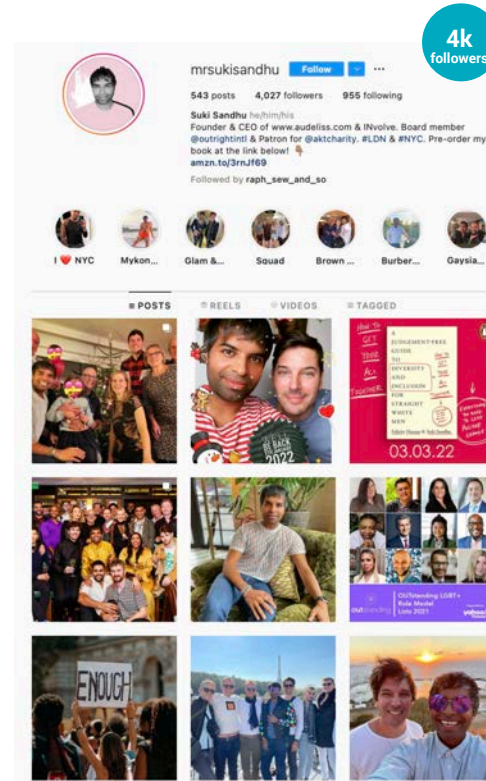
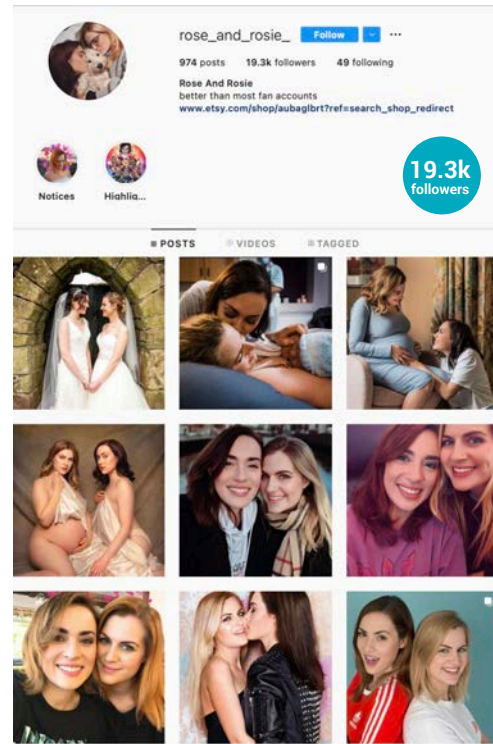
Media Coverage



Top Websites



Influencers



LGBT
foundation

PRIDE

Helping you to understand the audience opportunity

- Information that can be used to:
 - Design and create niche inspired products
 - Audience tailoring and opportunity spotting
 - Work together on product packages

The ISLANDS of
GUERNSEY