

A scenic view of a rocky coastline with clear blue water and a couple swimming. The water is exceptionally clear, showing a vibrant greenish-blue hue near the bottom. Two people, a man and a woman, are swimming in the water. The man is on the right, smiling, and the woman is on the left, seen from the back. They are surrounded by large, dark, craggy rocks that form a natural pool. The sky is a clear, bright blue with a few wispy clouds. The overall atmosphere is peaceful and idyllic, suggesting a perfect vacation spot.

2023 Marketing Strategy Overview

The ISLANDS of
GUERNSEY

The context and opportunity

2023 is going to see people venturing further. And we need to make sure the Islands of Guernsey remain firmly on people's shopping list.

The holiday landscape continues to offer VisitGuernsey a unique opportunity. Our proximity to the UK, safe environment, unique offering and quality / choice of hotels and restaurants are all attractive.

With consumers still looking for outdoor and family reconnection, we can offer that reconnection much closer to home, but we are going to have to work harder than ever.

We can offer all the comforts of a domestic break, with the excitement of an overseas destination.

Visit Britain data tell us that 52% of those surveyed intend to take an overseas trip in 2023 (increasing from 40% in January 2022)

https://www.visitbritain.org/sites/default/files/vb-corporate/2023-01-19_domestic_sentiment_tracker_report_-_january_release.pdf
https://www.visitbritain.org/sites/default/files/vb-corporate/covid-19_consumer_tracker_report_wave_42_final.pdf

Figure 9. Difference in short break/holiday choices in the next 6 months compared to pre-pandemic, Percentage, August 2022, UK



TOP 5 reasons for UK preference

1. UK holidays are easier to plan (67%)
2. To avoid long queues at airports/cancelled flights (50%)
3. UK holidays are cheaper (49%)
4. Shorter / quicker travel (44%)
5. To avoid long queues at ports/ Channel crossing (39%)

TOP 5 reasons for Overseas preference

1. Better weather (40%)
2. I want to visit new places (34%)
3. I'm prioritising overseas trips after missing out during the pandemic (29%)
4. Overseas holidays are cheaper (25%)
5. I want to explore other cultures (23%)

Figure 26. Motivations for UK holidays and short breaks in August to September 2022, Percentage, August 2022, UK, Full list



Figure 27. Motivations for UK holidays and short breaks in October – December 2022, Percentage, August 2022, UK, Full list



Key challenges

Many are stating that the worst is still to come in regards to cost of living

There are less overseas trips being planned than before the pandemic.

Barriers to taking UK trips include cost of living, personal finances and rising cost of holidays whereas last year this list included safety and quarantine / covid measures.

https://www.visitbritain.org/sites/default/files/vb-corporate/2023-01-19_domestic_sentiment_tracker_report_-_january_release.pdf

Key Metrics	January 2023	Change since December 2022
% of UK adults stating 'WORST IS STILL TO COME' in regard to cost of living crisis	71%	+3%
Proportion intending a UK overnight trip at any point in the next 12 months	70%	+1%
Proportion intending an overseas overnight trip at any point in the next 12 months	52%	-1%
Preference for UK over overseas in the next 6 months (vs pre-pandemic)	31%	-4%*
Took a domestic overnight trip in the past 12 months (Jan - Dec 2022)	61%	+3%
Net proportion of UK trips in the next 12 months vs pre-pandemic [% 'more' minus % 'fewer' trips]	7%	+4%*
Net proportion of overseas trips in the next 12 months vs pre-pandemic [% 'more' minus % 'fewer' trips]	-15%	+4%*
Reduce the number of UK overnight trips due to cost of living crisis [NET 'fewer', 'not go', 'go day trips instead']	29%	-1%
Reduce the number of day trips due to cost of living crisis [NET 'fewer', 'not go on day trips']	34%	-2%
Top 3 barriers to taking a UK overnight trip in the next 6 months	1 st Rising cost of living; 2 nd Personal finances; 3 rd Rising costs of holidays	Personal finances moves to 2 nd ; Rising costs of holidays moves to 3 rd

* Represents a statistically significant change on previous wave

The plan

We are building and learning on the success of 2022.

Our strategy

Going into 2023, VisitGuernsey's strategy is twofold – to continue to broaden our target audiences, encouraging a younger visitor, and to extend our season into the shoulder months. Something we saw success with in Q3/4 of 2022. Occupancy Survey data

Our creative approach

VisitGuernsey are keeping it real. Real experiences, real people. We want to show potential visitors that we have everything they are looking for, without pretending to be something we are not. We are continuing with our authentic creative, using Islanders who embrace Island life to the full, as we think they are best places to show off the Islands of Guernsey at their best.

A place where unique memories can be made, that last a lifetime.

Our media plan

2023 is about sweating our budget. Our plan includes social and digital advertising, traditional print, on demand TV, digital billboard and cross track. For the first time we have highly visible digital billboard advertising in prominent locations around key departure points. We will be using new formats and channels to attract new audiences. Our focus remains digital, as it is the most cost effective, adding in digital TV and increasing our Out of Home advertising.



Escape to Guernsey

Our current communications strategy plays to our strengths, an alternative and boutique destination that:

- Is easy and quick to get to
- Offers much needed respite and reconnection (wellness)
- Is safe and familiar
- Offers a brilliant outdoor experience that delivers on outdoor wellness needs: walks and beaches to surfing, kayaking, paddle boarding, cycling, sailing and more
- Has a quality hospitality offering with a concentration of high calibre restaurants, bars, beach cafes and visitor experiences
- Offers a broad choice of hotels and accommodation options
- Steeped in 1000s of years of history and heritage
- Neighbouring Alderney, Sark, Herm and Lihou inspire your inner adventurer

The last year (2022) has seen an increasing desire for country escapes and outdoor spaces

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, while 40% are opting to explore unfamiliar destinations.

These findings are echoed in the European Travel Commission latest survey, which highlights that European short terms travel plans have a strong preference for nature-based or coastal destinations.

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

The audience opportunity

VisitBritain data tells us that majority of trips are being taken by couples and then family / multi-gen who are looking for time together.

Figure 26. Motivations for UK holidays and short breaks in January-March 2023, Percentage, January 2023, UK, Full list



Figure 24. Visitor party make-up for trip in January to March 2023, Percentage, December 2022 to January 2023, UK

December 2022/January 2023 data December 2021/January 2022 data

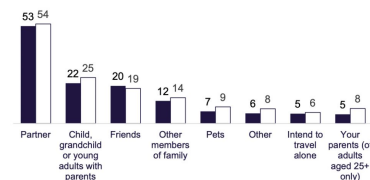
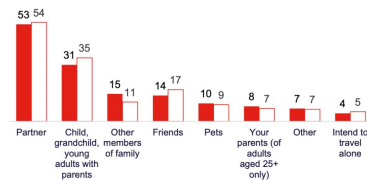


Figure 27. Motivations for UK holidays and short breaks in April-June 2023, Percentage, January 2023, UK, Full list



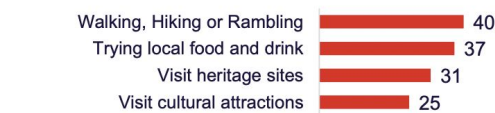
Figure 25. Visitor party make-up for trips taken from trip in April to June 2023, Percentage, December 2022 to January 2023, UK

December 2022/January 2023 data December 2021/January 2022 data



For 2023 we want to target a more affluent customer who can stay for longer and spend more per visit. Using walking, hiking, rambling, food and drink as a core way to connect

Figure 29. Activities for UK holidays and short breaks in April-June 2023, Percentage, January 2023, UK, Full list



Our audience focus

Focusing on a more affluent audience, mainly 35- 65+ couples, who over index on location +6% South West, +4% South East +4% East of England. An audience that are less price conscious in a cost of living crisis.



Baby boomers

Experian Mosaic:
Prestige Positions

Our heartland visitor. Affluent and older, many are regular visitors to the Islands and they hold a special place in their hearts. They are looking for a safe and familiar environment that is close to home.

Interests: Food & Drink, Natural Beauty (Cliffs, Walking), Heritage

9.0%
of the population

Own large detached houses, highly educated, high discretionary income

Bullseye audience

56-65

- 2 million households
- 4.5 million individuals
- £150k+ income

94.9%

home owners

Detached houses

Advert Response Channel



76

111

100



84

67

87



Multi-generation & families

Experian Mosaic:
Domestic success

Families looking to reconnect. This group will be motivated by a broad variety of accommodation options in a safe environment with a host of family & friends activities catering for all ages.

Interests: Food & Drink, Beaches, Island Hopping

7.05%
of the population

Families with children, mid to high income, mortgages, online shoppers

Bullseye audience

36-45

- 2 million households
- 4.3 million individuals
- Average two children
- £70-99k income

88.1%

home owners

Detached houses



84

96

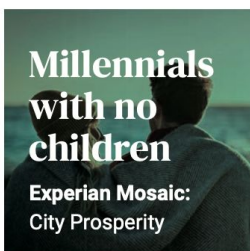
120



123

119

130



Millennials with no children

Experian Mosaic:
City Prosperity

A new younger audience - looking for experiences together. Looking for escapism and Instagram moments.

Interests: Food & Drink, Activities, Beaches, Island Hopping, Wellness

3.97%
of the population

High value properties, central city areas, high status jobs, low car ownership, high internet usage

Bullseye audience

26-35

- 2.18 million households
- No children
- £150k+ income

49.1%

rented

Flats



153

137

106



70

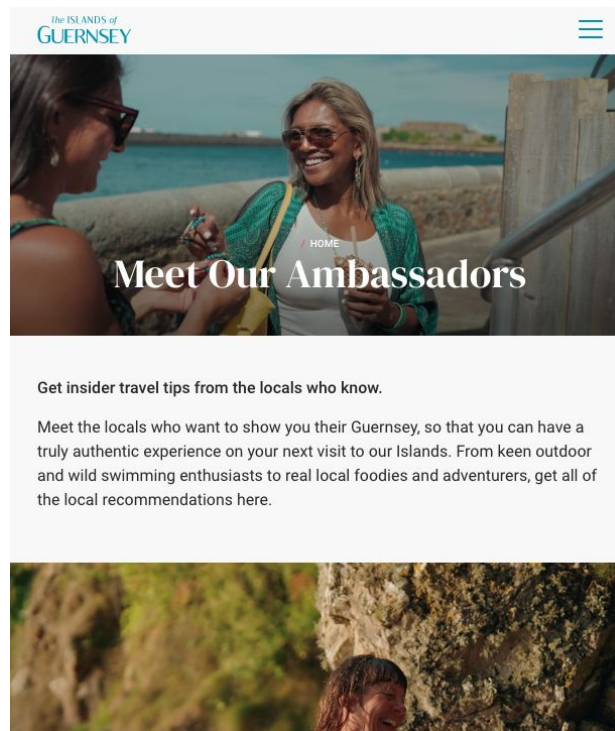
52

103

Working with ambassadors to capture #ThatIslandFeeling

Get insider travel tips from the locals who know.

Meet the locals who want to show you their Guernsey, so that you can have a truly authentic experience on your next visit to our Islands. From keen outdoor and wild swimming enthusiasts to real local foodies and adventurers, get all of the local recommendations here: visitguernsey.com/ambassadors



The campaign approach

Break away this year

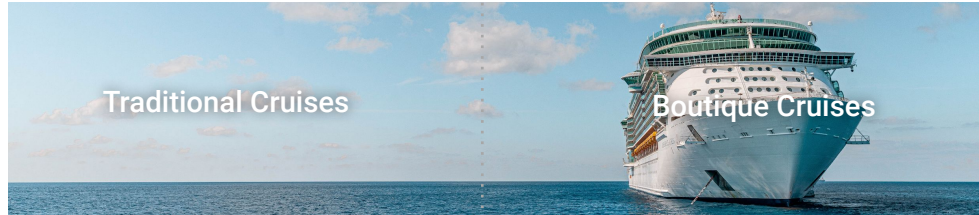
An all year flexible approach that allows us to show a variety of scenes and locations, capturing quirk and authenticity to truly deliver #ThatIslandFeeling

The campaign will feature 5 key scenarios that will be added to as the campaign evolves.



Communications Focus

MAINTAIN



GROW

TARGET



NICHE
Lifestyle rather than demographic



2023 Marketing delivery - building on areas that have worked for us in 2022

Larger format and disruptive media has been proven to be effective, working alongside digital activity. As tested this year.

Large scale digital OOH - London and Regional (proximity to departure points) inc supermarket OOH



Hyper targeted digital TVC delivery with Sky - focusing on SW regions around departure points



Regional digital delivery across platforms +25 mile radius around departures



Instagram

Adding new lifestyle digital targeting - focused around departure points



Targeted print advertising and partnerships, achieving a balance between mainstream and specialist

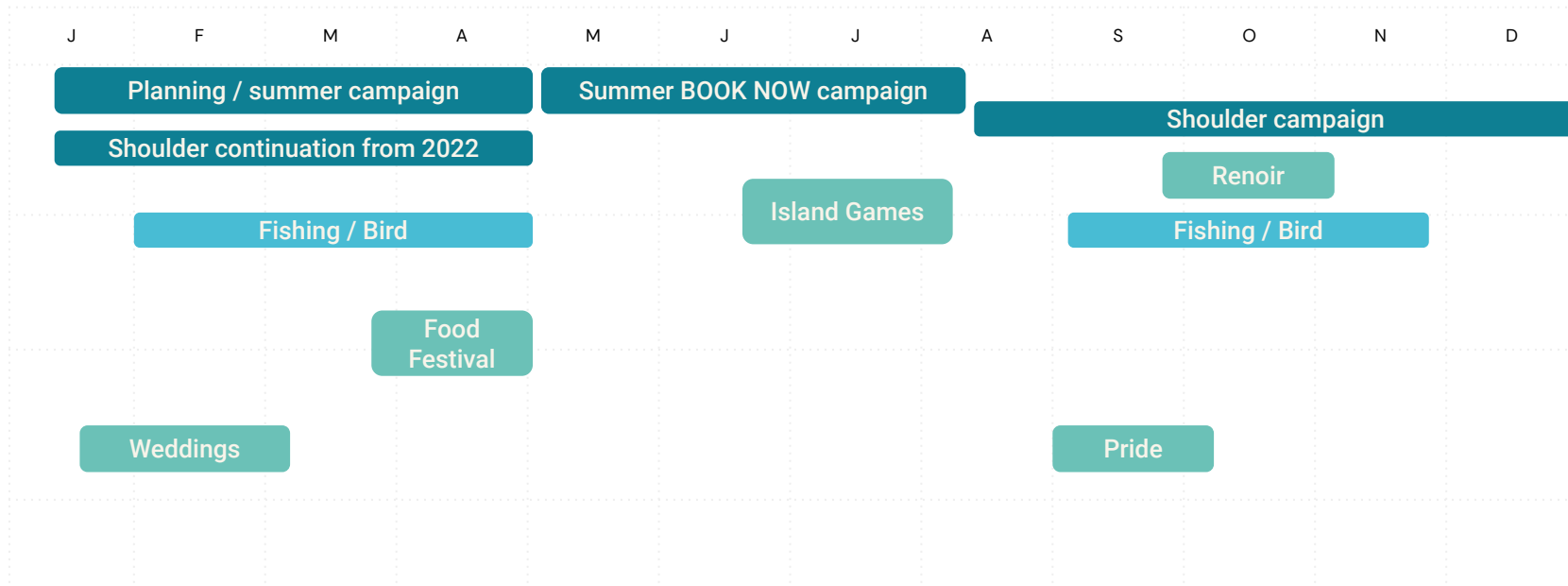


2023 Media Schedule

For 2023, we want to create 3 spikes across the year, January to help inspire travel and give us share of voice amongst other holiday planning, to begin our summer campaign, in April with continual support across the summer months, plus an additional spike in September to boost shoulder month activity.

[illegible]

Campaign & comms plan



Invitation to Advertise 2023

Making the most of opportunities with VisitGuernsey with new partnership packages - Free, Silver, Gold & Platinum

All trade partners are entitled to a bronze package, free of charge, but there are opportunities to enhance marketing opportunities, whatever the budget, which include:

- Listings on visitguernsey.com
- Special offer listings
- Quarter page or full page ads in new brochures
- Social media features
- Special offers included in consumer mailers
- Featured listings on visitguernsey.com
- Content partnerships

The ISLANDS of GUERNSEY

Partner Packages

For Trade Partners

How we are already supporting you

We are dedicated to helping your business reach as large an audience as possible. There are the ways we are already doing that, free of charge.

- Listing on visitguernsey.com searchable instantly on resulting in search income meaning a guaranteed website that don't have a website
- Featuring in new brochures as organic blog and posts. For example
- Supporting your unique, creative which are our free of charge of the VisitGuernsey website
- If you've got it, get it paid!

Marketing Packages

Making the most of your opportunities with VisitGuernsey

All trade partners are entitled to a bronze package, free of charge, but there are opportunities to enhance your marketing opportunities, whatever your budget, and make sure you get noticed.

Bronze	Silver	Gold	Platinum
Standard listing on the VisitGuernsey website	Standard listing on the VisitGuernsey website	Standard listing on the VisitGuernsey website	Standard listing on the VisitGuernsey website
Special offer listings on the VisitGuernsey website	Special offer listings on the VisitGuernsey website	Special offer listings on the VisitGuernsey website	Special offer listings on the VisitGuernsey website
2 x quarter page brochure adverts (one per edition)	2 x half page brochure adverts (one per edition)	2 x full page brochure adverts (one per edition)	2 x exclusive special offers featured in consumer mailers
2 x social media features	2 x social media features	2 x exclusive special offers featured in consumer mailers	2 x exclusive special offers featured in consumer mailers
			2 months featured listing on visitguernsey.com
			1 x content partnership with radio May promoting social
Free	£500	£1,500	£3,000

*All prices include VAT. Prices are for one year. A full second year price is available. All prices are subject to change. All prices are subject to change. All prices are subject to change.

Europe activity

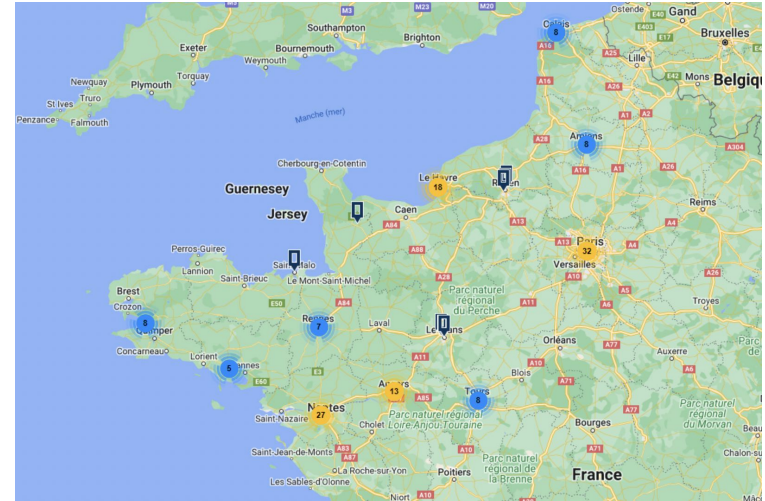
France

- Continue with the visiting journalist programme in France.
- Promotion of the Renoir exhibition will be a big highlight for French media.
- Joint partnership activity with the carriers to promote the french routes.
- New PR representation in France.
- Promotion of Tour de La Ports de La Manche welcoming 650 visiting yachtsmen, including supporting the organisation of a vin d'honneur at The Crown Pier.

Germany

- Continue with the visiting journalist programme in Germany.
- Lobby Lubeck Air to programme Guernsey for 2023
- Trade Roadshow to build on relationships
- Considering attending ITB

French OOH - Paris + Departure points + wider territories



PR

The visiting journalist programme will continue

Working on opportunities with brand partners (Muddy Puddles)

Opportunity on the Island Games

Cultural Tourism focus with Renoir exhibition and the Photography festival

Continue with niche audiences in Fishing & Bird Watching

Trade

Partnership Marketing will continue

Reach out activity for new operators already in progress

Looking into Online Travel Training for 2023

Working with Travel Weekly & Group Travel Organiser

Consideration of “Destination Guernsey” trade workshop for 2023 - if interest on-island for this

Cruise

Attendance at SeaTrade Global

Reach out to new & existing cruise liners

First ever familiarisation trip

Membership of Cruise Britain

New video & photography

Continue to promote to cruise media

Product activity for 2023

- **Event Groups funding** - We have already provided funding to the GHA to support the “Taste Guernsey Food Festival” from 1st to 30th April 2023.
- **Marketing Sports Tourism** - Island Games, Velo Club, Sports Commission, Visiting Yachtsmen
- **Island Hopping** - continue to promote our unique island hopping opportunity and visibility in #thatislandfeeling
- **We will continue with joint marketing** with tour operators and carriers. In addition to this we will be putting a proposal together to present to the carriers to join us in marketing campaigns.

A photograph taken from inside a dark cave, looking out through a jagged opening. The scene outside is a bright, sunny day at a coastal location. In the foreground, the silhouettes of a man and a woman are visible as they look out towards the sea. The woman is on the left, holding a camera up to take a picture. The man is on the right, looking out. The sea is a deep blue, with some lighter green patches near the shore. A prominent rock formation juts out into the water. The sky is a clear, pale blue. The text "Thank you" is centered over the middle of the image, in a white, serif font.

Thank you