



States of
Guernsey

Committee for Economic Development

The ISLANDS of
GUERNSEY

GUERNSEY TOURISM

TEN POINT PLAN 2020-2025

Document Date: January 2020

1. Strategy Background

- 1.1. The Guernsey Tourism Strategy 2015-2025 was developed during 2014 by Marketing and Tourism (M&T), which then reported to the Commerce and Employment Board, in collaboration with the Chamber of Commerce Hospitality and Tourism Sub-Group (T&HSG).
- 1.2. The Strategy document was published in 2015 and was the first produced as a joint States and Industry document. The document aimed to set out the key high level strategic aims for the tourism sector to achieve, with the ultimate aim of arresting the long term decline in visitor numbers, and creating a firm strategic platform for future sustained growth.
- 1.3. A high level aspirational growth objective of +3% year on year to 2025 was agreed with an aim of achieving total visitor numbers of 400,000 (excluding Cruise and Visiting Yachtsmen) by 2025.

Key Strategic Aims 2015-2025

1 Evaluate new, sustainable and competitive routes to the islands

2 Strengthen the islands' unique product offering

3 Deliver an exceptional visitor experience

4 Develop a positive environment for growth and investment

5 Develop marketing and messaging that is consistent and compelling



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- 1.4. 22 Strategic Action Plans were identified and agreed to help deliver the Key Strategic Aims. The 22 Strategic Action Plans summarised in the document were considered at the time to be realistic and deliverable within the time-frames stated. Each Key Strategic Aim is supported by a more detailed Specific Action Plan which detail the feasibility studies, business cases, actions and initiatives considered necessary to deliver against the strategic objectives agreed.
 - 1.5. It was recognised that many of the Strategic Action Plans would be outside of the direct influence and control of the then Commerce and Employment Board and of industry members, and that other States departments and stakeholders would need to support and help facilitate delivery.

1. Strategy Background cont.

The Strategic Action Plans falling under each of the Key Strategic Aim headings are:

1. Evaluate new, sustainable and competitive routes to the islands

- 1.1 – Evaluate new and stronger route connections to the island (UK and Europe)
- 1.2 – Encourage competitive fares on all routes to the islands
- 1.3 – Discuss opportunities to maximise the potential of the new Aurigny jet
- 1.4 – Question runway length and ability to attract airlines with wider reach and larger jets



2. Strengthen the islands' unique product offering

- 2.1 – Improve quality and content of island events
- 2.2 – Develop and support family oriented attractions
- 2.3 – Develop the wedding offering
- 2.4 – Investigate the conferencing and meeting offering
- 2.5 – Re-visit camping and glamping offering
- 2.6 – Work to facilitate improvements to marina facilities
- 2.7 – Work with Tour Operators to improve package offering

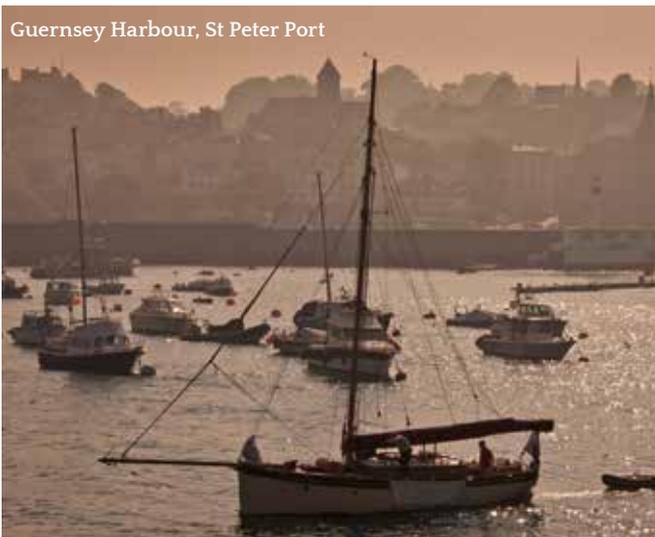




Cruise liner anchored in the Little Russel

3. Deliver an exceptional visitor experience

- 3.1 – Industry to focus on NPS and Visitor Satisfaction
- 3.2 – Become an accessibility friendly island
- 3.3 – Improve the Cruise Liner visitor experience and encourage repeat visits and generate more value
- 3.4 – Improve the St Peter Port experience for visitors



Guernsey Harbour, St Peter Port

4. Develop a positive environment for growth and investment

- 4.1 – Input into Planning Policy changes to help provide more tourism friendly legislation
- 4.2 – Facilitate access to States owned land and property for tourism development
- 4.3 – Input into Housing Policy re impact on hospitality staff accommodation and staff retention



5. Develop marketing and messaging that is consistent and compelling

- 5.1 – Promote the Bailiwick’s unique archipelago and Island Hopping Experience
- 5.2 – Collaborate with Jersey to push the ‘Channel Island’ offering
- 5.3 – Secure more budget for TV advertising
- 5.4 – Joined up marketing with the Industry and Trade

2. Strategy Review

- 2.1. As is good practice with any strategy document, M&T and the T&HSG used the strategic plan as a live working document and regularly reviewed progress against the objectives and aims contained within it during monthly meetings.
- 2.2. An annual review and update of progress made against the strategic plan was also presented in the October of each subsequent year, at the annual Tourism Industry Seminar to local Industry members, Trade partners and States members by the Director of Marketing and Tourism together with the Chairman of the Chamber of Commerce Tourism and Hospitality Sub-Group.
- 2.3. The progress made over the past four years against the 22 action plans is summarised in the table below:

Progress made

1. Evaluate new, sustainable and competitive routes to the islands
Progress summary:
· 'Quasi Open Skies' – Introduced September 2018
· 'Air and Sea Links Investment Objectives' Policy Letter – Approved by the States Assembly in November 2018
· 10 new scheduled air routes launched / announced, 7 since 'Quasi Open Skies' policy introduced including: London Heathrow, London Southend, Liverpool, Newquay, Edinburgh, Bournemouth, Newcastle (Summer 2020), Leeds / Bradford, Cardiff and Glasgow
· 17 new European charter routes launched / announced including: Holland – Groningen Germany – Berlin, Stuttgart, Hannover, Bremen, Dortmund, Dresden, Hamburg, Frankfurt, Braunschweig, Erfurt – Weimar, Friedrichshafen, Leipzig, Lubeck, Memmingen, Munster, Nuremberg and Rostock-Laage (Summer 2020)
· Strategic Review of Air and Sea Links Infrastructure – Part A completed September 2018
· States of Guernsey & States of Jersey working with Condor on the review of the 2014 Condor Ferries Operating Agreement
2. Strengthen the islands' unique product offering
Progress summary:
· Events Group Funding – Focussed on Floral, Arts, Sports and Food & Drink with introduction of 'Other' category for 2020
· Launch of new Heritage Festival (2014), Food Festivals (2015), Floral Festival (2018), Summer and Autumn Walking Festivals (2016)
· PwC Strategic Review of Guernsey Tourism Product Offering (2017)
· Seafront Enhancement Area Programme launched 2018
· Marriage Reform Legislation – Liberalisation of laws including allowing for wedding ceremony to take place at any time during the day and at any location (legislation to be enacted)
· New European Tour Operator partners providing new charter packages
· New Specialist US Tour Operators
· New Specialist Australian Tour Operator

3. Deliver an exceptional visitor experience

Progress summary:

- Discrimination Law - Policy Team, Disabled Go / AccessAble engagement (legislation in development)
- Continual improvement of the Albert Pier Cruise Passenger welcome arrangements and product offering, recognised by the Cruise Critic's Awards - 'Best UK Port of Call' 2016, 2017 & 2018
- Seafront Enhancement Area programme (SEA) - Initiatives to develop and improve Cruise Passenger arrangements and the St Peter Port experience

4. Develop a positive environment for growth and investment

Progress summary:

- Working with Development & Planning Authority and input into IDP policies
- Seafront Enhancement Area programme (SEA)- Launched initiatives in 2019 to make States' owned assets available for public / private investment including The Guernsey Information Centre, La Vallette, the Vivier Bunker and the Round Top (Crown Pier)
- Population Management Legislation & Policy - Changes made to the nine-month / three-month Seasonal Worker Policy and to the Open Market Part B policy
- Immigration - Proposals agreed to streamline the Visa application process and to aid recruitment from Non-EU labour markets

5. Develop marketing and messaging that is consistent and compelling

Progress summary:

- Island Hopping USP - Consistent promotion of the Island Hopping offering by VisitGuernsey and its Trade and Industry partners since 2015
- Launched new branding 'The Islands of Guernsey' 2019
- VisitJersey collaboration - Launched Channel Island Heritage Festival in 2016, and joint approach to marketing the Channel Islands to Europe including:
 - Joint charter agreements with Dutch and German Tour Operators
 - Joint attendance at the ITB (Conference and Exhibition) in Berlin each year
- Additional funding secured from the Future Guernsey Fund for:
 - TV advertising - 2015 & 2016
 - Awarded 'Best TV Advertising Campaign' - National Travel Marketing Awards - 2015
 - Guernsey Literary and Potato Peel Pie Society movie themed marketing campaigns (UK and USA markets) - 2018
 - Victor Hugo / Hauteville House themed marketing campaigns (UK and French markets) - 2019

2. Strategy Review cont.

2.4. In October 2016 the States Assembly debated the Island Development Plan (IDP) policy letter. The IDP's policies and regulations relating to the tourism sector included reference to the Guernsey Tourism Strategic Plan 2015–2025, and as the plan had not been debated or approved by the States Assembly an amendment was tabled by Deputy Soulsby and Deputy Prow and was subsequently approved by the Assembly.

2.5. The amendment instructed the Committee for Economic Development to return to the States Assembly in 2018 with a review of the Tourism Strategic Plan.

The Review of the Guernsey Tourism Strategy 2015–2025 was to be presented to the States Assembly by 31 October 2018. However following the completion of Part 1 of the Strategic Review of Sea and Air Links Infrastructure commissioned by the Policy and Resources Committee and completed in September 2018, the Committee for Economic

Development advised the Assembly that the presentation of the review of the Tourism Strategic Plan would need to be deferred due to the decision made by the States Assembly not to provide funding to commission Part 2 of the Strategic Review of Sea and Air Links Infrastructure, which was to provide a detailed cost benefit analysis for extending the airport runway.

2.6. As the development of Guernsey's sea and air links is identified as the priority Strategic Aim within the Guernsey Tourism Strategic Plan 2015–2025, and is fundamental to defining the visitor market Guernsey is able to target and attract to the island, the Committee for Economic Development felt it vitally important that the findings and recommendations of the Strategic Review of Sea and Air Links Infrastructure should inform and help shape any review of the Guernsey Tourism Strategic Plan, and the development of a future tourism strategy.

- 2.7. Any significant investment in and development of Guernsey's air and sea links infrastructure is likely to have a material bearing on the size and profile of the potential visitor market that can be targeted in the future, and therefore will have real implications in respect of the potential visitor growth opportunity. For example, an extension to the airport runway, to a length that would allow the narrow body jets used by Low Cost Carrier airlines to operate to Guernsey, will give the opportunity to target a broader, more price sensitive holiday and short break market. This will also have implications on the size, number, quality and nature of Guernsey's tourism product offering (accommodation, attractions, events, island transport etc.) required to meet the expectations of that broader market.
- 2.8. As a result of the cessation of the work necessary to complete the Strategic Review of Sea and Air Links Infrastructure, the Committee for Economic Development instructed the Director of Marketing and Tourism to agree an interim Tourism Strategy 'Ten Point Plan' with the Industry.
- 2.9. A draft Tourism Strategy 'Ten Point Plan' was approved by the Committee for Economic Development in August 2019. A summary Tourism Strategy 'Ten Point Plan' was presented to the Tourism Trade and Industry at the annual Tourism Industry Seminar on the 1st October 2019. Following feedback from the Tourism Trade and Industry, The Chamber of Commerce subsequently endorsed the draft Tourism Strategy 'Ten Point Plan'.



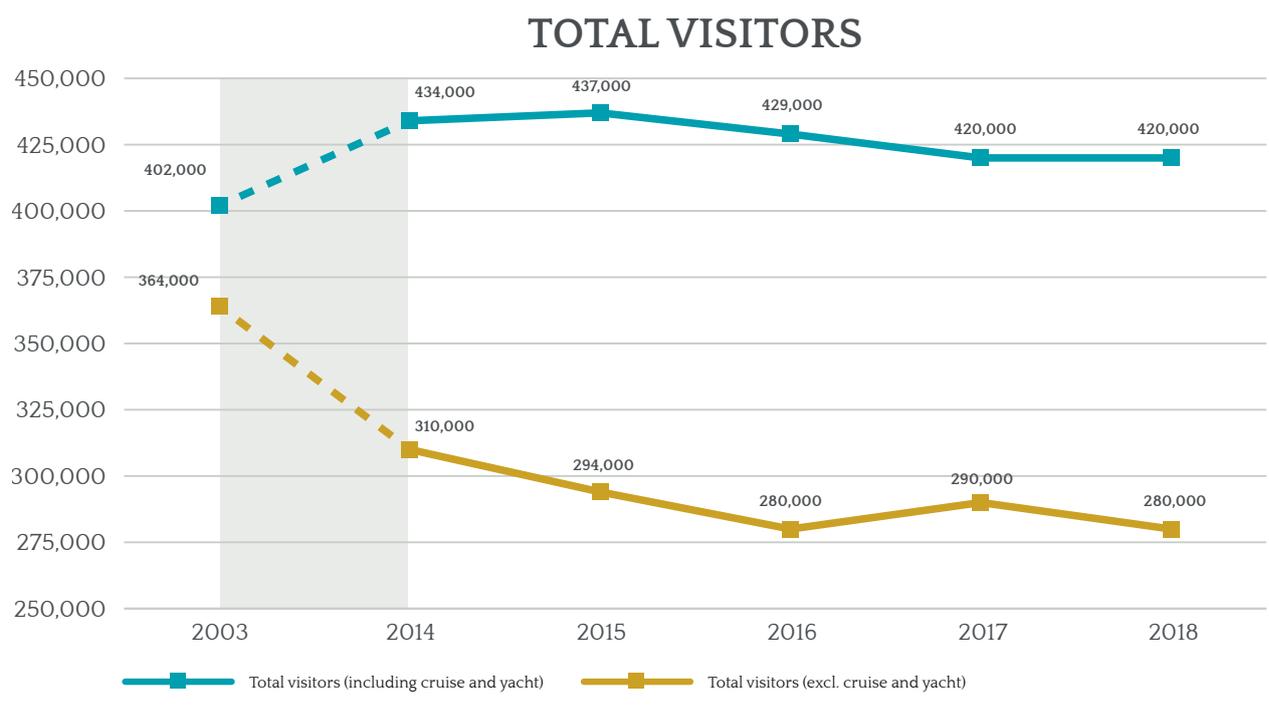
3. Objectives Review

3.1 Review of 2015–2025 Growth Objectives

3.1.1 The Guernsey Tourism Strategy 2015–2025 included a ten-year growth objective of 30% (c3% annual growth), with the aim of achieving **400,000** visitors (excluding Cruise and Visiting Yachtsmen) by 2025. In 2014 the total visitor number was **310,000**.

3.1.2 The total visitor numbers in 2014 including Cruise and Visiting Yachtsmen was **433,000**.

3.1.3 In 2018 **Total Visitor number (excluding Cruise and Visiting Yachtsmen)** was **280,000**, a decline of **33,000** visitors or **-10%** since 2014. The main contributing factor to the decline being the loss of a substantial part of the Day Visitor market. The decline in Day Visitors by sea accounted for **20,000** of the **33,000** loss; the vast majority a result of the introduction of the Condor Liberation which now only operates a single rotation each day with a schedule that does not allow for a full day visit to the island. Day Visitors by air account for **13,000** of the **33,000** and could be attributed to air fare levels and the dynamic nature of air fares which can penalise late bookings, a feature of the Day Visitor market.



3.1.4 In 2018 **Total Visitors including Cruise and Visiting Yachtsmen** was **420,000**, a reduction of **13,000** or **-3%** since 2014. Cruise passengers saw a growth of **+13%** to **121,000** from **107,000** in 2014 .

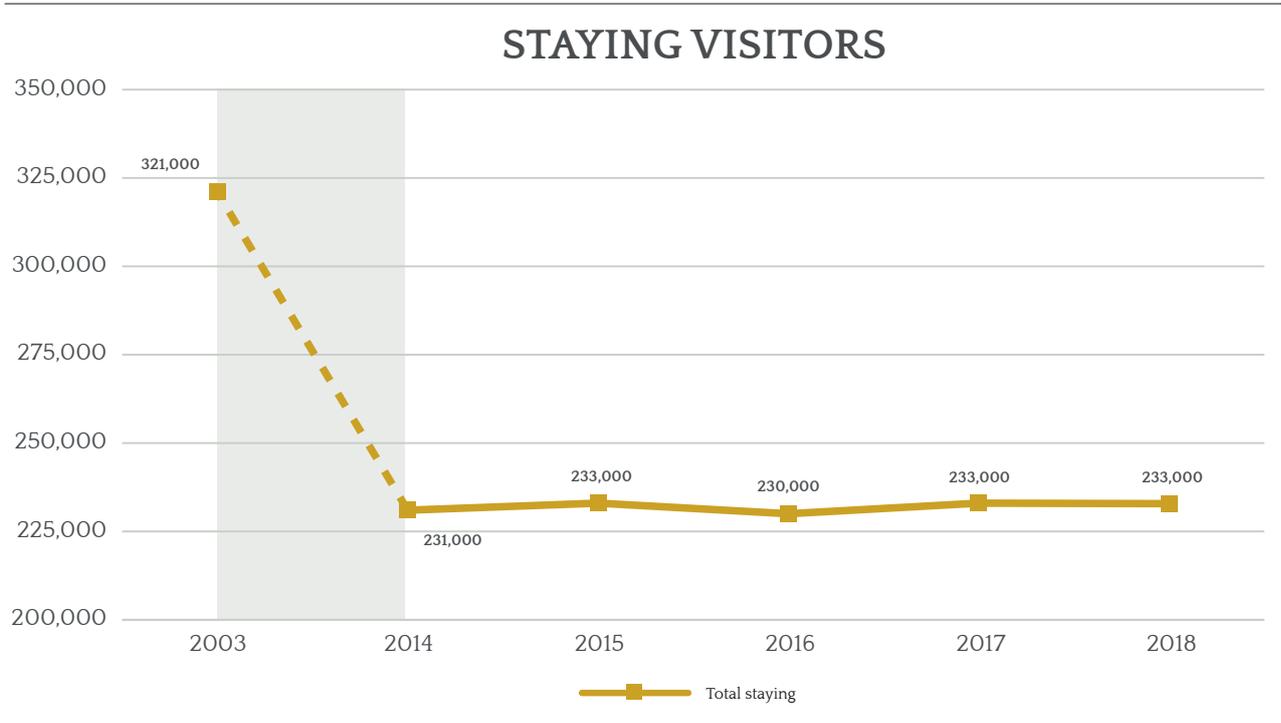
3.1.5 In 2014, the **Total Staying Visitor** number was **c231,000**. Staying Visitors are the value engine for the tourism economy as the vast majority stay in paid for accommodation, and the average spend is significantly higher than Day Visitors. Staying Visitors comprise Staying Leisure Visitors, Staying Business Visitors and Visitors Visiting Friends and Relatives (VFR), of whom up to **30%** stay in paid for accommodation.



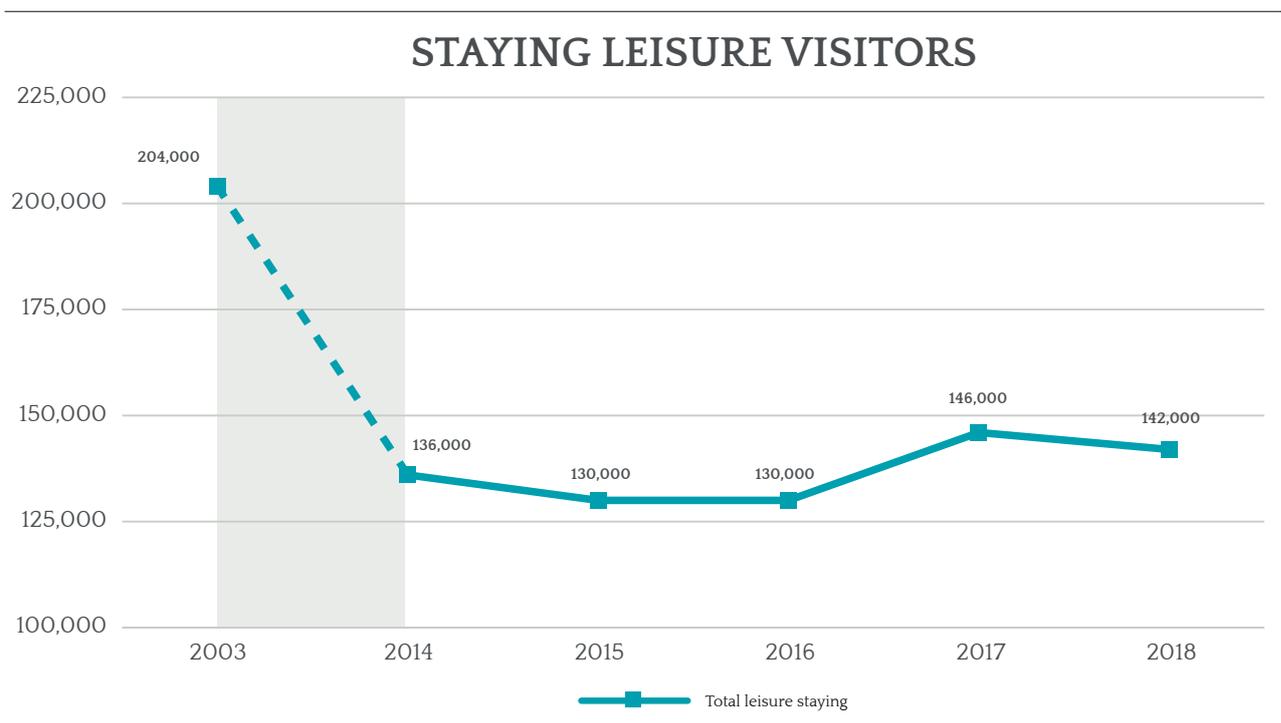
Liberation Day, St Peter Port

3. Objectives Review cont.

3.1.6 After over 20 years of consistent year on year decline to 2014 in the region of **-30%**, the number of Staying Visitors has stabilised and has shown a modest increase since 2014. In 2018 Total Staying Visitor numbers were **233,000**, an increase of **2,000** visitors or **+1%** since 2014. Of the **233,000** Staying Visitors, **c66%** are Returning Visitors (have visited Guernsey at least once in the past), but **34%** are visiting Guernsey for the first time.



3.1.7 In 2018 the high value **Staying Leisure Visitor** number was **142,000**, an increase of **6,000** visitors or **+4%** since 2014.



- 3.1.8** In 2014 **Total Day Visitor** numbers were **79,000**. **44,000** of the total travelled to the island by sea and **35,000** by air.
- 3.1.9** In 2018 **Total Day Visitor** numbers were **46,000**, a decrease of **33,000** visitors or **-42%** since 2014. In 2018 **24,000** visitors travelled to the island by sea and **22,000** by air. As identified, the lack of a double rotation or two fast ferries on the Northern UK route is considered to be the main contributing factor and without reintroducing this service, it will be very difficult to recover these numbers.
- 3.1.10** The latest 2019 Visitor Exit Survey Report, January to September (Q1-Q3), shows a stabilisation of the **Total Visitor numbers (excluding Cruise and Yacht)** at **237,000**, with continued modest growth for **Staying Leisure Visitors** of **+2% (123,000)**.
- 3.1.11** **Total Visitor numbers including Cruise and Yacht** was **369,000**, down **-1%**, the decline mainly a result of an increasing number of weather related cancellations to planned cruise liner visits (25 cancellations YTD).
- 3.1.12** Jan-Sept 2019 Visitor numbers from the **UK** of **154,000** has seen a **-8%** decline (the reported 'Brexit' factor influencing discretionary spend) however this decline has been compensated for by a very healthy **+47%** increase in visitors from **France (28,000)**, as well as an encouraging increase of **+14%** in visitors from other non UK markets such as **Germany, Holland and the USA (39,000)**.

Guernsey Harbour, St Peter Port



4. 2020–2025 Ten Point Plan

4.1 2020–2025 Growth Objectives

- 4.1.1 Due to the issues and factors impacting growth to date, as already detailed, Total Visitor volume growth has not achieved the 2015–2025 3% year on year growth objectives, however after well over 20 years of steady decline the value driving **Staying Leisure Visitor** numbers do appear to **have stabilised and have shown some modest growth** since 2015.
- 4.1.2 Significant investment in the development of air and sea links infrastructure is still required to help deliver improved affordability, reliability and connectivity and to give Guernsey access to a much broader and more price sensitive visitor market (i.e. Low cost carrier airlines). CfED will therefore continue to focus its efforts on attracting the current **Core target market** segments to Guernsey i.e. **ABC1,C2 40+ adults**, plus the **ABC1 40–55** Family market (during the main holiday season).
- 4.1.3 However without a material increase in the Marketing & Tourism departments marketing budgets (the M&T budget has declined in real terms by over **-56%** since 2001), improved air and sea connectivity, and improved quality of product offering (as highlighted in the PwC report), the opportunity for real volume growth will realistically be limited.
- 4.1.4 The growth objectives for 2020–2025 should reflect the recent trends and overall market environment, and therefore should be modest and at best should be in line with current trends. i.e. **Total Visitors (including Cruise and Yachtsmen)** growth no greater than **+1% (no greater than 4,200)** year on year, with **Staying Visitors** up by **between +1% - +1.5%** year on year (2,330 to 3,500).
- 4.1.5 It will be very difficult to estimate growth opportunity after 2025 until Part 2 of the **Strategic Review of Sea and Air Links** is completed and the findings and recommendations of the review are understood. Any decision in the coming 18 months to invest in extending the airport runway, to give access to low cost carrier / narrow body jet operators and / or to invest in additional ferry services, will have fundamental implications on the potential visitor market Guernsey will have access to, and therefore the magnitude of the volume growth opportunity.

4.2. 2020-2025 Strategic Aims and Action Plans

- 4.2.1 To achieve the growth objectives stated the Committee for Economic Development, together with other States Committees and stakeholders and the Tourism Trade and Industry will need to focus on executing the Key Action Plans necessary to deliver the greatest impact on the reliability, affordability and connectivity of air and sea links and the quality and variety of the Guernsey tourism product offering.
- 4.2.2 Improved connectivity and an improved tourism product offering will help give the Tourism Trade and Industry an appropriate offering to promote and to differentiate Guernsey from its increasingly aggressive competitors.
- 4.2.3 During 2018, M&T and the T&HSG reviewed the five Key Strategic Aims and the supporting 22 Strategic Action Plans, and considered the progress that had been made against those plans (as detailed in section 1.6 and 2.3). It was collectively agreed that the Key Strategic Aims were still valid, but that the Strategic Action Plans should be limited to no more than ten.
- 4.2.4 Those plans have since been reviewed by CfED, and following consultation with Trade and Industry representatives the following Ten Point Plan 2020-2025 has been agreed (over page).
- 4.2.5 The budget and resources required to deliver the action plans needs wider consultation and engagement with other States Committee stakeholders, and will be subject to relevant feasibility studies and business cases.

Glamping, St Pierre du Bois



GUERNSEY TOURISM TEN POINT PLAN 2020-2025

Develop affordable, reliable and sustainable air and sea links

1. Confirm the business case for the extension of the airport runway
2. Invest in the development of existing and new sustainable air routes to the island
3. Investigate opportunities to improve the ferry service provision to the island

Strengthen the islands' tourism product offering

4. Investigate the opportunity to support the development of quality destination attractions through public / private collaboration
5. Investigate the opportunity to help improve the breadth and quality of the islands accommodation offering

Deliver an exceptional visitor experience

6. Further invest in and develop the cruise passenger experience / sector
7. Support the delivery of the Seafront Enhancement Area (SEA) programme / plans for the benefit of tourism

Develop positive environment for growth and investment

8. Investigate the opportunity to reduce red tape with regards to tourism planning and investment
9. Review the Population Management and Immigration legislation and policies to help address any material staff recruitment and staff retention issues

Promote Guernsey with compelling and consistent messaging and marketing

10. Develop campaigns and activities to target Guernsey's core target markets to drive awareness and help reduce seasonality

Develop affordable, reliable and sustainable air and sea links

1 Confirm the business case for the extension of the airport runway

- 1.1 Commission Part 2 of the Strategic Review of Air Links Infrastructure.
- 1.2 Complete Part 2 of the Strategic Review of Air Links Infrastructure by end of Q2 2020.
- 1.3 Carry out a full cost / benefit analysis of the runway extension scenarios 1700m to 1800m as recommended in the Strategic Review of Sea and Air Links Infrastructure PwC part 1 report.

“A 1,700/1,800m extension should be taken forward as the primary alternative to the 1,570m option. There are clear additional benefits and it is lower risk in the longer term, although there may be a substantial cost difference.

We recommend that this is taken forward as the other runway reference case and subjected to detailed cost-benefit analysis to determine if the greater cost of this option justifies the tangible benefits.”

Guernsey Air Links - Strategic Options Review - Part A Report- PwC - August 2018

- 1.4 Take a Policy Letter to the States Assembly before the middle of 2020 recommending investment in the air connectivity infrastructure options that present Guernsey with the most beneficial and acceptable economic, social and environmental impacts.
- 1.5 Complete all approved air links infrastructure developments by no later than 2025.



Guernsey Airport

Develop affordable, reliable and sustainable air and sea links cont.

2 Invest in the development of existing and new sustainable air routes to the island

- 2.1 Secure, if available, at least caretaker slots at Heathrow airport on a seasonal basis to maintain the current Heathrow link service.
- 2.2 Investigate opportunity to secure long term slots for the operation of regular, year round scheduled services to Heathrow Airport.
- 2.3 Secure a long term year round sustainable scheduled air link to the French market – at least one direct service for Summer 2020.
- 2.4 Continue to work with existing and new carriers to launch new sustainable scheduled routes to the UK and European market - Ongoing.
- 2.5 Continue to work with carriers and European Tour Operators to secure current and new charter routes from the European market - Ongoing.



Guernsey Airport Terminal

3 Investigate opportunities to improve the ferry service provision to the island

- 3.1 Continue to work with Condor Ferries and the States of Jersey to consider the service improvements necessary to justify the States of Guernsey agreeing to be a signatory to an extension of the 2014 Condor Operating Agreement (OA), and to put in place the appropriate Ro-Ro Ramp legislation to allow such an agreement to be signed by August 2021.
- 3.2 If the terms for an extension to the 2014 Condor Operating Agreement cannot be agreed by the States of Guernsey, the States of Jersey and Condor by the very latest 14th August 2021, will be in a position to take a Policy Letter to the States of Guernsey to ensure an alternative provider of Guernsey's Ferry services can be in place and operational by the very latest at the end of the OA wind down period 29th March 2025.



Strengthen the island's tourism product offering

4. Investigate the opportunity to support the development of quality destination attractions through public / private collaboration

- 4.1 As stated in the PwC Tourism Product Strategic Review Report, Castle Cornet and the Harbour estate are at the heart of Guernsey's jewel in the crown - St Peter Port, and offer significant opportunities for investment and development for the benefit of tourism. CfED as part of its role on the SEA programme will be recommending that these opportunities are investigated and where feasible followed through - Ongoing.

"As the centrepiece of the port and the stand out heritage site it (Castle Cornet) is significantly under activated. The surrounding area is poorly presented and used. Inside, the museums are well curated but are not distinctive enough to be a main tourist draw and are relatively small. As with many other such sites e.g. Oxford Castle, the castle can be sympathetically developed to be more 'alive' and distinctive. This could include conversion of buildings with a mix of F&B, tailored retail, hosting of regular events (shows and markets) and potentially a unique boutique hotel"

"A huge underexploited space that currently detracts from the town behind. There are many examples globally of ports being successfully regenerated as vibrant leisure and commercial areas. For tourism purposes the focus would be on the area around Castle Cornet. However, we recognise this would be part of a much more substantial masterplan for the harbour estate upon which the viability will be primarily dependent on the economic"

Tourism Product and Customer Experience Strategic Review - PwC - November 2017

- 4.2 Guernsey's rich military and WWII occupation history is a very important part of the Tourism offering, and as such the CfED will work with relevant stakeholders to support, where feasible, the development of this offering.

"Military heritage, defence and Occupation, this is the Island's main 'story' and it is relatively unique in retaining most Napoleonic and WW2 fortifications. While not a sufficiently compelling standalone attractor, these need to be much better managed, packaged and presented to impact the overall Island experience."

Tourism Product and Customer Experience Strategic Review - PwC - November 2017

Loophole Tower



- 4.3 Also highlighted in the 2017 PwC Tourism Product Strategic Review Report, the Victor Hugo offering is underexploited. Again CfED concurs with this conclusion and will be working with the SEA programme and other stakeholders to investigate opportunities to invest in developing and improving the offering. The development of a dedicated Victor Hugo centre is something the CfED is particularly keen to support - Ongoing.

“The island is blessed with having connections to an international literary icon in Victor Hugo. However, this though is not given sufficient prominence or exploited. The island needs to own its VH story with investment in more events associated with the author, more exposure given to key sites on the island to project its Anglo French heritage. This has proven appeal to the French market and will be of interest to the UK and US markets”

Tourism Product and Customer Experience Strategic Review – PwC – November 2017

Strengthen the island's tourism product offering cont.

5. Investigate the opportunity to help improve the breadth and quality of the islands' tourism accommodation

- 5.1 The PwC Tourism Product Strategic Review Report highlighted the need to address the overall quality of Guernsey's accommodation offering, and the need for it to keep pace with, if not exceed its target markets expectations. CfED is keen to see the ongoing healthy investment by the industry in the accommodation sector and to provide support where possible to facilitate and encourage further investment and development of existing and new hotels and other accommodation - Ongoing.

“While the mix of hotels and self-catering by star rating appears appropriate and similar to other destinations, this can be misleading as not a good judge of quality and feedback. Our own observation is that many of the hotels are not of a quality to meet the target markets' more modern expectations.”

Tourism Product and Customer Experience Strategic Review – PwC – November 2017

- 5.2 The PwC report highlighted a real opportunity for Guernsey to develop its 'Heritage Hotel' offering. CfED feels that with the abundance of historical and heritage buildings extending back through history, that this opportunity should be investigated. M&T and CfED will use its position on the SEA programme, and also working with the Culture and Heritage department to highlight and follow up this opportunity where appropriate - Ongoing.

“The island would need more high quality boutique hotels as well as quality budget hotels. An attractive angle for the target market are 'heritage hotels' which provide an immersive and unique experience and a revenue source on unused assets. The wellness offering with Spas and fitness classes is under developed and we encourage hotels to better leverage activities on the island such as walking in 'health & wellness' packages”

Tourism Product and Customer Experience Strategic Review – PwC – November 2017

- 5.3 The PwC Tourism Product Strategic Review Report also highlighted the need for Guernsey to embrace the 'swing Accommodation' offering, to allow it to flex capacity. CfED will work with the DPA to identify opportunities to provide more flexibility for private dwellings to help address the capacity issue - Ongoing.

“There is a wide mix of accommodation on the island with some good recent development. However much of the old stock has been under invested, with falling occupancy and closures, particularly of coastal hotels. The short season, and falling numbers within this, is making many more coastal properties unviable, while tight planning laws are discouraging new investment. We note that despite this there are pinch points in peak season but there is a lack of flexible ‘swing’ rooms enabled by offerings such as Airbnb. We recommend some policy liberation following a full scenario review of the sector.”

Tourism Product and Customer Experience Strategic Review – PwC – November 2017

Cycling in St Pierre du Bois



Deliver an exceptional visitor experience

6. Further invest in and develop the cruise passenger experience / sector

- 6.1 Continue to work with Guernsey Harbours and Cruise Industry partners to provide ongoing improvements to the cruise operation. Improved tendering operation, cruise passenger traffic management, cruise passenger welcome facilities and cruise passenger tours and activities will be the key area of focus - Ongoing.



“The cruise market is expected to continue to grow, driven by ageing population, penetration into younger segments and increased spending”

“While cruise passengers are day visitors and are relatively low spend, return rates for longer stays are increasing. Guernsey could have more active initiatives that expand a cruise visitor’s experience of the island and its attractions.”

“Visitor experience, particularly for cruise ships, can be significantly enhanced. Currently, there are issues around arrival facilities, poor transportation around the island and often a lack of flexibility in opening times from shops and attractions.”

Tourism Product and Customer Experience Strategic Review – PwC – November 2017

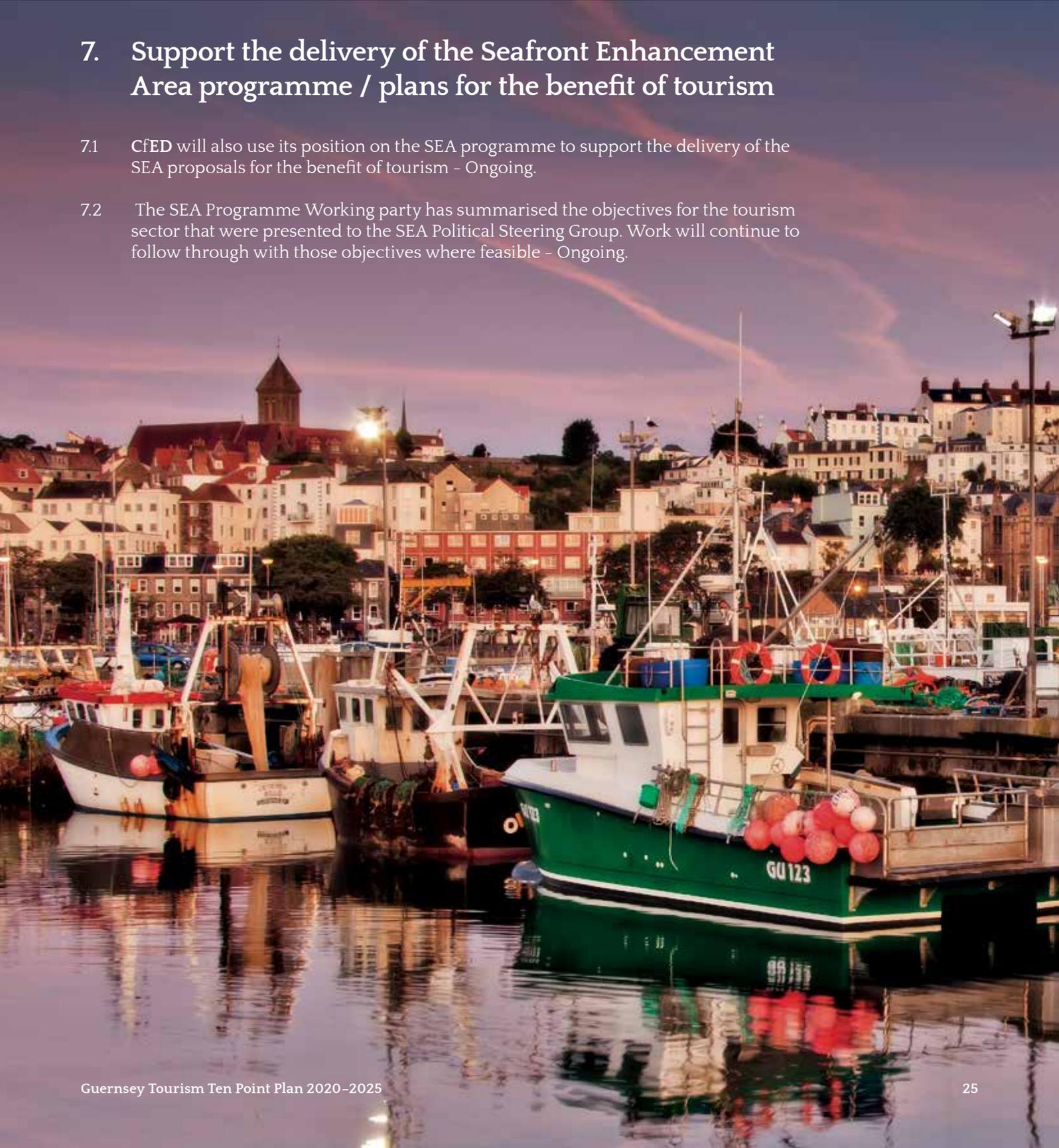


Cruise liner anchored in the Little Russel

Deliver an exceptional visitor experience cont.

7. Support the delivery of the Seafront Enhancement Area programme / plans for the benefit of tourism

- 7.1 CfED will also use its position on the SEA programme to support the delivery of the SEA proposals for the benefit of tourism - Ongoing.
- 7.2 The SEA Programme Working party has summarised the objectives for the tourism sector that were presented to the SEA Political Steering Group. Work will continue to follow through with those objectives where feasible - Ongoing.



TOURISM

St Peter Port is considered to be Guernsey's 'Jewel in the Crown', and is consistently quoted as one of Europe's most attractive harbour towns. However, many stakeholders in Guernsey's tourist market believe that St Peter Port as a tourist attraction is under optimised and does not meet its potential. The PwC report identified attractions such as Castle Cornet and Hauteville House as areas that are currently underexploited and should be enhanced to support Guernsey's tourist product.

Castle Cornet and the other heritage assets require investment for more fundamental redevelopment / re-packaging by allowing for appropriate commercialisation to help make the offering more relevant and appealing to today's visitor market and to help ensure long term viability and financial sustainability.

Visitors' feedback through VisitGuernsey's regular surveys ranks the island's natural beauty, leisure walking, heritage, island hopping and eating out as the main influencing factors for visiting Guernsey. St Peter Port however, delivers well below expectations when it comes to providing opportunities for entertainment and for eating and drinking indoors or 'al-fresco' at close quarters to the harbour.

Experiencing the sister islands and Island Hopping is a key differentiator for Guernsey and a major attractor to the island. However, the lack of available long term parking and modern terminal facilities is seen as a deterrent for those who wish to visit Herm, Sark and Alderney by sea.

Visiting yachts are a tourist demographic that Guernsey could do significantly more to attract. Currently, the facilities offered to this market at the St Peter Port marina fall well below that offered by competing UK and French marinas. Improvement of these facilities will illustrate Guernsey's desire to attract the larger, higher spending yachts and motor cruises to the island.

The current dominance of motor vehicles along the St Peter Port seafront is a significant detractor from the appeal of St Peter Port as a tourist destination. As such, relocating car parking and traffic flows away from the waterfront in order to allow the development of accommodation offering, as well as visitor friendly sightseeing, entertainment, leisure, food and beverage, retail activities, is the number one opportunity for the SEA programme.

SEA Steering Group – February 2019



Deliver an exceptional visitor experience cont.

- 7.3 The SEA Programme Working party has summarised the objectives specifically for the Cruise Sector that were presented to the SEA Political Steering Group. Work will continue to follow through with those objectives where feasible - Ongoing.

CRUISE INDUSTRY

Representatives highlighted the substandard quality of cruise liner facilities in St Peter Port as a major factor restricting the maximisation of benefit arising from the cruise industry. Currently, cruise ships have to tender their passengers to and from the ship due to a lack of alongside berthing in Guernsey. Not only does the requirement to tender mean that certain cruise liners will not visit Guernsey, it also is a significant detractor from Guernsey's offering to cruise liner passengers. Issues such as long waiting lines and weather restrictions can have a negative impact on visitor experience.

Since 2008, the annual number of cruise ships visiting Guernsey has significantly increased, from 45 ships to 82 ships in 2018. Likewise, the number of passengers visiting Guernsey has also significantly increased, most recently being 118,000 passengers in 2018. Not only does the cruise industry have a direct benefit of an estimated £4 million yearly contribution to Guernsey's economy, it is also resulting in wider indirect benefit, with 3% of overnight stay visitors to Guernsey having previously visited the island by cruise.

Although Guernsey is frequently considered to be one of the favourite UK ports for cruise liners, other jurisdictions are improving their offering for cruise liners, which, coupled with the substandard quality of facilities in St Peter Port, is reducing Guernsey's competitive advantage in attracting cruise liners to visit the island.

In order to maintain its competitive advantage, Guernsey will need to enhance its facilities for cruise liner passengers and should consider providing improved infrastructure that would remove the need for cruise liners to tender.

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Develop positive environment for growth and investment

8. Investigate the opportunity to reduce red tape with regards to tourism planning and investment

- 8.1 Engage with stakeholders and the DPA to identify opportunities to review the Tourism Use Class planning policies and where necessary feed those findings into the formal review of the IDP - 2020.

9. Review the Population Management and Immigration legislation and policies to help address any material staff recruitment and staff retention issues

- 9.1 Engage with stakeholders and the Committee for Home Affairs (CfHA), to identify opportunities to review the specific Population Management and Immigration legislation and policies impacting the ability of the tourism and hospitality sector to successfully recruit and retain both seasonal and permanent staff members, and where appropriate, feed those findings into the formal review of the Population Management and Immigration Laws - 2020.



Promote Guernsey with compelling and consistent messaging and marketing

10. Develop campaigns and activities to target Guernsey's core target markets to drive awareness and help reduce seasonality.

10.1 Focus resource and efforts on marketing to increase the penetration of its three core target markets, as endorsed by PwC in its Tourism Product and Customer Experience Strategic Review report: i.e.

1. Affluent Adventurers - Social Demographic: ABC1, Age Range: Across 40 – 65 (including Baby Boomer generation)
2. Traditional Values - Social Demographic: ABC1/2, Age Range: 66+ with an average age 70
3. Fun Loving Families - Social Demographic: AB, Age Range: 40 – 55 years old

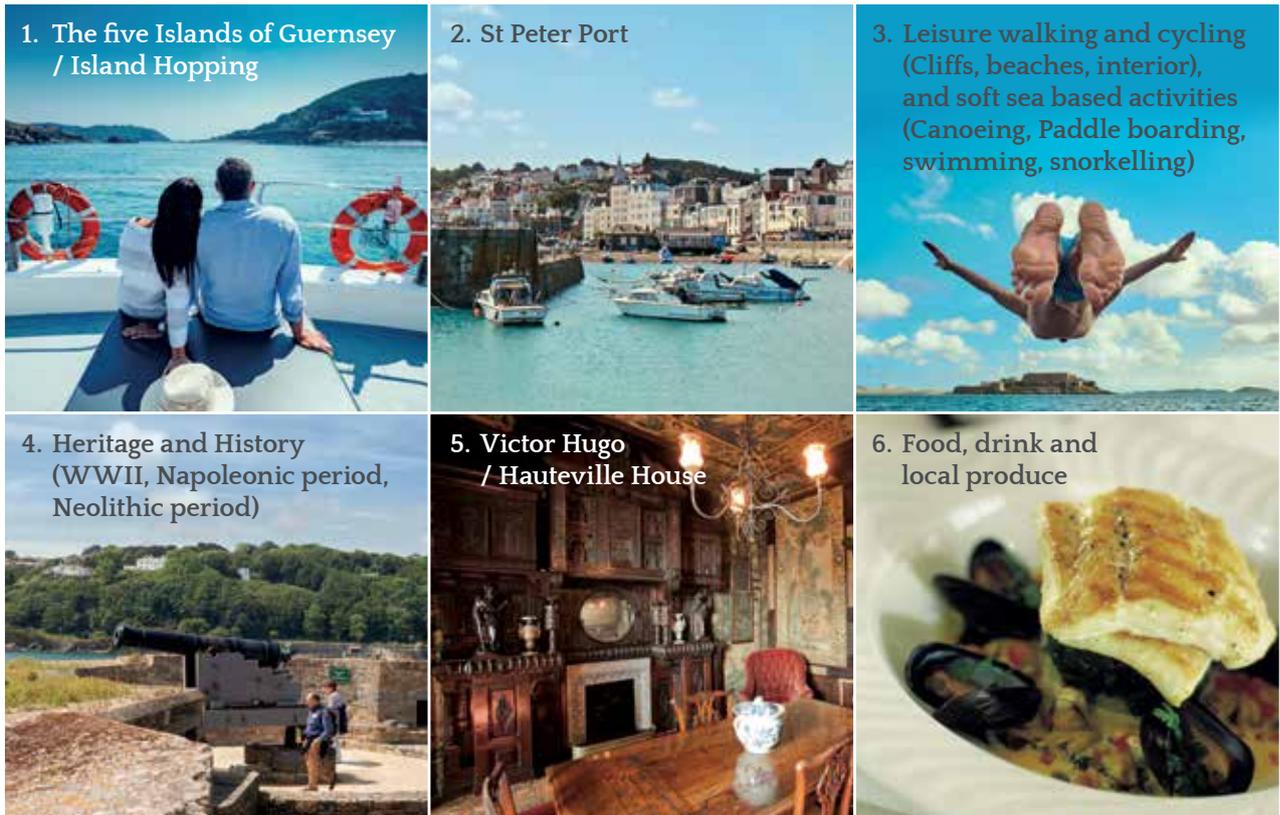
“Guernsey can make itself more attractive to the young Baby Boomer segment (50+) seeking short/city breaks, currently a core market for Guernsey, in addition to retaining/growing the 65+ market. These consumers look for high quality experiences and have high expectations for accommodation standards, restaurant and retail offering, and overall service.”

Tourism Product and Customer Experience Strategic Review – PwC – November 2017



- 10.2** Focus media spend on those media platforms that provide the optimum reach and frequency for the core target audience (e.g. TV, radio, outdoor, print, web / digital marketing, social media, selected events and exhibitions and PR).
- 10.3** Drive increased visitor market awareness of, and interest in Guernsey through targeted campaigns and messaging promoting Guernsey's key 'Unique Selling Propositions' (USPs).

Key USPs include:



- 10.4** Work with UK, European and US Tour Operator partners to present a consistent marketing message and to help drive increased enquiries and bookings to Guernsey for short breaks and holidays.
- 10.5** Work with European Tour Operators to promote and present a consistent marketing message to existing and new charter package flights to Guernsey.
- 10.6** Work with air and sea carrier partners to help to present a consistent marketing message and to help drive increased enquiries and bookings to Guernsey.
- 10.7** Work with local industry partners (accommodation providers, attraction providers and activity providers) to help to present a consistent marketing message and to help drive increased enquiries and bookings to Guernsey, and to help develop the local product offering.
- 10.8** Work with Cruise Industry partners to drive increased cruise visitor numbers to Guernsey, and to improve the cruise passenger experience in Guernsey.
- 10.9** Take every appropriate opportunity to bid for additional funding to help capitalise on key tactical and strategic opportunities that present themselves.

4. 2020 -2025 Objectives and Strategic Aims & Plans cont.

4.4 Ten Point Plan 2020-2025 Prioritisation

4.4.1 In consultation with Industry and the Chamber of Commerce Tourism and Hospitality Policy leads, the strategic aims and Ten Point Plan was prioritised into the following headings:

Game Changers – Fundamentally important to the future sustainability of the industry

Enablers – Key to unlocking future potential

Acceleration – Key to driving future growth

4.4.2 The ten key action plans were then placed under one of the three agreed headings with the intention of helping to make clear the relative importance to the industry, and to help focus resource and investment.



GAME CHANGERS:

1. Review the Population Management and Immigration legislation and policies to help address any material staff recruitment and staff retention issues
2. Confirm the business case for the extension of the airport runway
3. Investigate opportunities to improve the ferry service provision to the island

ENABLER:

4. Invest in the development of existing and new sustainable air routes to the island
5. Further invest in and develop the cruise passenger experience / sector
6. Investigate the opportunity to reduce red tape with regards to tourism planning and investment

ACCELERATION:

7. Develop campaigns and activities to target Guernsey's core target markets to drive awareness and reduce seasonality
8. Support the delivery of the Seafront Enhancement Area (SEA) programme / plans for the benefit of tourism
9. Investigate the opportunity to help improve the breadth and quality of the islands accommodation offering
10. Investigate the opportunity to support the development of quality destination attractions through public / private collaboration

Walking at Fermain Bay

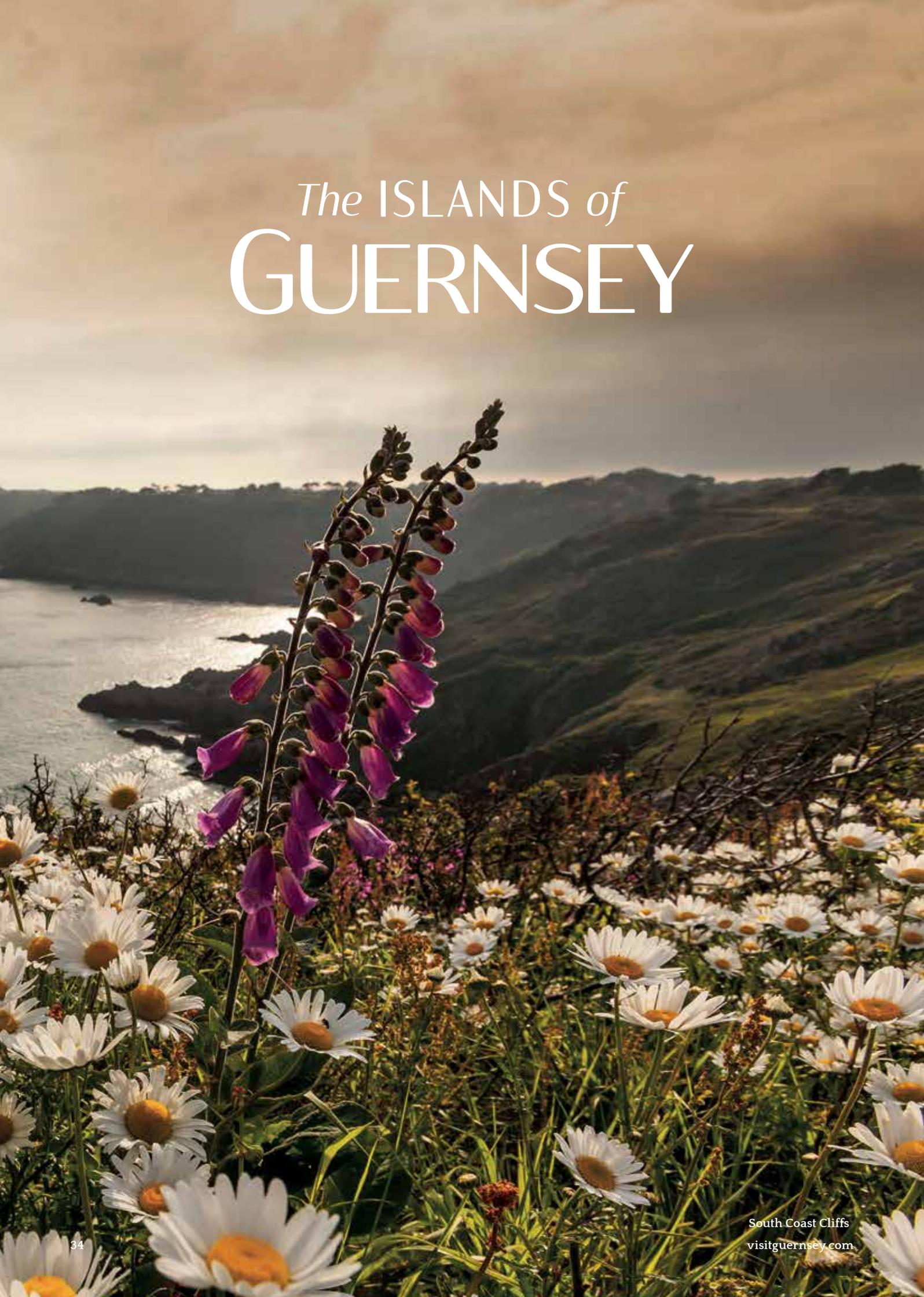
5. Ten Point Plan

– Review and Monitoring

5.1 Ten Point Plan Review and Monitoring

5.1.1 Progress against the Ten Point Plan will be reviewed on a quarterly basis with the Committee for Economic Development. Progress will also be discussed and shared with the Chamber of Commerce Tourism and Hospitality Policy leads on at least a six-month basis and will be presented to the wider Trade and Industry during the annual Tourism Industry Seminar.

5.1.2 Progress against the Ten Point Plan growth objectives will be monitored through the publication of the Quarterly Visitor Exit Surveys and through feedback from the Tourism Trade and Industry.



The ISLANDS of
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Committee for Economic Development

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