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16 Tourism and Recreation

16.1 Introduction

Guernsey has a thriving tourist industry which underpins much of the economy. The tourism industry is a sustainable industry within Guernsey with major reason for people visiting being the natural beauty of the island and its location. This chapter provides an overview of tourism in Guernsey and looks at the potential impacts on tourism from the introduction of marine renewable energy in the Bailiwick waters.

The reasons for visiting the islands overlap with those that attract and retain the permanent population. Residents of Guernsey enjoy a high quality of life. Recreation is an important part of life on Guernsey and there are many sport and activity groups and facilities.

16.2 Baseline Environment

Guernsey attracts in the region of 186,000 “staying leisure” visitors a year. This is the type of visitor who holidays on the island taking advantage of the large numbers of local hotels. This number of people accounts for approximately one third of the total traffic through Guernsey Airport, which is a sizable proportion. As well as this they increase the custom of local restaurants and retail establishments. This provides an economic boost to those industries during the tourist season.

In addition to this there are cruise ships which visit the island for a couple of days, allowing people to come ashore. Cruise passengers contribute around 55,000 tourists to the island a year, who again contribute to the retail and hospitality industries of Guernsey.

The final major contributor to Guernsey’s tourism industry is sailors who stop off in the island, either overnight for a longer period of time. This contributes around 20,000 people per year to the tourist industry who again contribute to the hospitality and retail industry. They will also tend to purchase fuel for their vessels which further contributes to Guernsey.

Guernsey’s tourist industry is seen as a sustainable industry, in the sense that it has a 60-70 year heritage and it has survived and outlived other industries like the loss of the growing market. If at some stage in the future the banking and financial services sector cease to be on the island, Guernsey would still be a deeply attractive place for people to come to and visit. This makes the tourism industry a very important part of the Guernsey economy.

Many of the aspects of Guernsey life that make it attractive to other areas of the economy, such as banking, and a good place to live with local amenities would cease should the tourism industry no longer be around.

16.2.1 Reasons for tourism in Guernsey

People come to Guernsey for a number of reasons, one of the main features promoted by Guernsey's tourist board and that attracts people to holiday in Guernsey is the Island's natural beauty. However much of Guernsey's "natural" beauty is actually man made. The water front for the vast majority of the East coast of the island has been developed by man's hand over the last 200-300 years. That does not take away from the attractiveness of the island for both the natural beauty of the cliffs and the man made architecture of the St Peter Port waterfront.

Because of the natural beauty of the islands of Guernsey, Herm and Sark there are numerous walks around the Islands and coming to the islands for relaxing walks along the cliffs and along the waterfront is a major reason for many tourists. In addition to this there are a number of Public parks and Gardens on the islands which further encourage walking to tourists.

There is also the historical aspect to Guernsey, with markers of the occupation during the Second World War such as the fortifications around the coast still highly visible. There is also the occupation museum on Guernsey as well as many other historical features such as Castle Cornet and Victor Hugo's House.

The uptake of activities off the coast of Guernsey such as surfing and canoeing by tourists is an increasing part of the Guernsey tourism experience. However this does not form a major part of the tourist industry as Guernsey is not a surfing hotspot, so keen surfers would holiday in places of known good quality waves, such as Cornwall. As such this forms more of an opportunistic part of tourism, rather than the reason for visiting.

There is also the return tourism, people that have enjoyed their time in Guernsey and return again for a number of reasons, such as those listed above, or for other reasons, such as the large number of specialist jewellers on Guernsey. They may also be attracted back by some of Guernsey's unique aspects such as the Little Chapel, Guernsey Telephone Museum and the Clockmakers.

There is a potential public view that Guernsey should embrace the Eco-Tourism market, on the grounds that it's a short air flight to get here which therefore uses less fuel than other countries (for people from the UK). However, Guernsey as an island does not offer much, if anything, in the way of Eco-Tourism (environmentally sensitive tourism). Guernsey can only really be reached by carbon expensive methods of travel, there is 60,000 gallons of sewage pumped straight out into the sea every day, one of the major skyline impressions you get approaching the island are two large factory chimneys and Guernsey has a very disproportionate car ownership to population ratio. Guernsey's energy consumption per person is also very high compared to other developed countries. In a broader context Eco-Tourism is only a very minor proportion of worldwide tourism and economy at the moment.

16.2.2 Type of visitors

The average Guernsey tourist tends to be a couple aged 55+, which is a section of society as a whole which is only going to become bigger in the coming years. It is important to remember that just because people have passed 50 that they are less active or adventurous, and there is a large proportion of this age group who are increasingly active as quality of life, health and medicine improve.

16.2.3 Effect of Tourism on the Economy

As mentioned above, approximately a third of the traffic through Guernsey Airport which in turn allows for the maintaining of multiple air routes to and from the Island which not only benefits the economy but also allows travel choice for the people of Guernsey.

Treasury and Resources estimates that for the categories of hostelry and retail somewhere in the region of £60-70million per year comes from the tourism industry. The total percentage of the gross domestic product (GDP) that is contributed by these two industries was 9.6% in 2008. It is not know the exact figures for what Tourism's percentage input to these figure were, but the hostelry industry is strongly linked with tourism. There is less of an input from tourism to retail as Guernsey is an affluent place with people of expendable income, but there is a link to income from retail and tourism. In addition to this the Transport industry and Recreation industry contributed 2% and 1% respectively.

16.3 Potential Effects

The Marine and coastal environment plays a large part in tourism in Guernsey, being as it is a small island. This means that any impact on this area during Installation, operation, maintenance or decommissioning of marine renewables could have an effect on the tourism industry.

16.3.1 Visual Impact

There is the possibility that should the devices be visible from certain areas of the coastline surrounding Guernsey there could be a negative effect. People come to Guernsey primarily for the scenery, so anything which could affect the natural beauty of the surrounding area could have a negative effect. Installation activities could temporarily affect the attractiveness of some areas of the islands, which could affect visitor's perceptions of the Bailiwick. In addition to this, some areas of installation of the cables may lead to restrictions of access to certain areas of coast. This may also have an effect on people's perception of the isles. These effects are discussed in detail in the chapter on Landscape (chapter 19).

16.3.2 Water Quality

There is a potential for accidental spillages and leaks to affects the water quality in bathing areas. This could have a negative effect on tourism if certain beaches became affected. These effects are discussed in detail in the chapter on water quality (chapter 6).

16.3.3 Noise

There is a potential for noise to have an adverse effect on tourism, with increased noise in coastal areas due to increased shipping, installation of cables and devices and the movement of machinery parts possibly creating noise in previously quiet bays. There is also the potential for an indirect effect on tourism, with increased noise potentially displacing marine wildlife; reduced numbers of animals could affect any nature observing in the area. Further details of the effects of noise are covered in chapter 17.

16.3.4 Collision Risks and Access Restriction to Certain Areas

The effect of marine devices in terms of safety and collision risk is discussed in the Chapters in relation to shipping and navigation, marine mammals, Pelagic Ecology and Birds. Submerged and surface piercing devices all present a potential hazard to other users of the marine environment .Collisions could cause damage to vessels and danger to the health and safety of people in the area. Increased risk of collision with structures at sea could act as a deterrent to recreational sailors or water sports enthusiasts which in turn could reduce the attractiveness of Guernsey as a

tourist destination. However the likelihood is that most of these areas would be outside normal tourist recreational use, it is more likely to be a problem with regards to people sailing to and from Guernsey.

Avoidance areas surrounding devices may have a negative effect similar to those of collision risks. It is likely that in any area where there is a collision risk that access restrictions will be enforced, thereby reducing the collision risk, but increasing the reduction in areas traditionally used for recreation.

16.3.5 Disturbance of Wildlife

As mentioned with regards to noise, there is the potential disturbance and displacement of wildlife. The effects specifically on wildlife are covered in the relevant chapters, marine mammals, Pelagic Ecology and Birds, but as mentioned above, any negative impact on wildlife could have a potentially negative knock on effect on tourism.

16.3.6 Energy Change Effects on local Beaches

The potential changes in energy caused be the extraction of energy by the marine devices may lead to a change to marine processes, including the height of surfing waves. This is covered in detail in the chapter on marine processes (chapter 5), with any potential effect on beaches around the island having the possibility to affect tourism.

16.3.7 Creation of Tourism

Marine renewables have the potential to have a positive effect on tourism, with the possibility that Guernsey generating electricity from tidal and wave devices attracting people to come and learn more about the devices. With increased awareness of climate change, any opportunity for people to gain firsthand experience of the technologies could be potentially positive for tourism in the Bailiwick. So as to enhance the experience, if a centre based on marine renewables was opened in tandem with device deployment could boost tourism further.

16.4 Sensitivity of receptors

The term sensitivity when related to tourism means the possible change in the numbers of people visiting the Bailiwick of Guernsey. It is important to note that this is a subjective assessment and with so few devices installed currently there are high levels of uncertainty regarding how people will react to marine renewables.

Many of the negative effects associated with wave and tidal devices take place out at sea, and while there may be some visible impact during installation, the general sensitivity of tourism is low. Once installed, so long as the tidal devices are not surface piercing there will be no visible impact, save at sites where cables are brought aground. Wave devices will be similarly fully or partially submerged and likely not visible from the coast.

Because a major attraction for the majority of tourists is the tranquillity and natural beauty of the islands in the Bailiwick, the potential sensitivity of tourism to effects on marine wildlife is also low. However, if water quality were to be significantly affected then the knock on effect on loss of bathing waters could lead to reduced numbers of people visiting Guernsey.

16.5 Potential Significance of Effects

The assessment of the significance of effects is based on the criteria as follows :

Major – Results in significant loss of the quality or integrity of an attribute which would have long term or lasting, damaging effects on the tourist industry. This would imply a substantial reduction in the number of people and have resultant effects on local business.

Moderate – Results in loss of the quality or integrity of an attribute which would have an adverse effect on the tourist industry. This would imply a reduction in the number of people and resultant effects on local business.

Minor – Results in a slight adverse change to the quality or integrity of an attribute. These impacts are normally temporary or reversible and are unlikely to have effects on local businesses.

Negligible – No Change to the tourist industry

The Value of receptors relating to tourism and recreation is considered to be ‘Regional’, as visitors to Guernsey often visit a number of the Channel Islands.

Table 16.5.1 below outlines the assessment of potential significance of effects without mitigation.

Table 16.5.1 – Significance of Effects

Potential Effect	Device Characteristic	Development phase	Tourism Receptors	Significance of effects on receptor
Noise Generation during Construction / Operation	All devices and cables	Installation Decommissioning Operation	Wildlife watching, Relaxation Tourism	Moderate Minor
Changes to Seascape	All devices and cables	Installation Operation Decommissioning	Walking, cycling, Site Seeing, water sports	Minor
Safety and Collision risk	All devices and cables	Installation, Operation, Decommissioning	Water Sports, Sailing	Moderate
Restriction of access	All devices and cables	Installation Operation Decommissioning	Water Sports, Sailing	Moderate
Water Quality	Wave and Tidal Devices	Installation Operation Decommissioning	Wildlife Watching, Bathing, Water Sports	Moderate
Disturbance of Wildlife	All devices and cables	Installation Operation Decommissioning	Wildlife watching	Moderate
Energy Extraction Affecting Beaches	All devices	Operation	Sight Seeing, Walking, Bathing, Water Sports	Minor
Creation of Tourist Attraction	Wave and Tidal	Operation	Sight Seeing	Minor Positive

16.6 Likelihood of Occurrence

The likelihood of occurrence can be divided up into direct effects, such as whether there will be noise produced, and indirect effects, such as whether there will be adverse effect on Tourism. With regards to noise generation, the direct effect is that there will definitely be noise created, however the indirect effect of effects on marine species a varied and uncertain (see Noise, Chapter 17). Any reduction to levels of local wildlife could have a negative effect on tourism, however the likelihood of effects on wildlife during operation is considered low.

Regarding seascape it is highly likely there will be some effects, especially during construction. How significant these are dependent upon deployment sites and devices design. It is well recognised that the natural Beauty of the Bailiwick is important to tourism, and the seascape makes up a large part of this. However, it is unknown precisely how changes in seascape would have on the popularity of Guernsey, Herm and Sark as a tourist destination. Generally much of Guernsey's Landscape has been shaped in one way or another and so it is considered that the likelihood of an array located in a coastal area reducing tourism is low. However, should subsequent large scale development occur this may change.

The likelihood of there being an increased collision risk is low due to the likelihood of exclusion zones being high. However due to the numbers of people who come over to Guernsey to participate in recreational water sports being low there is a low likelihood of an effect from. However, with around 20,000 people per year stopping off in Guernsey and the other islands, potential exclusion zones in areas normally used for navigation could deter people from coming to Guernsey. It is considered that the likelihood of effects on this form of tourism occurring is medium.

The likelihood of a reduction in water quality is medium. The likelihood that this would have a knock on effect on beaches is low. However, the likelihood that a reduction in water quality would have an effect on wildlife is medium.

Disturbance of wildlife can come from a number of sources as covered. The likelihood of there being a disturbance to wildlife is medium.

Based on information from the marine processes chapter (chapter 5), the likelihood that there will be an effect on beaches and coastlines due to changes in coastal processes is low.

16.7 Mitigation Measures

Where potential effects have been identified the following mitigation methods can be implemented to reduce the effect. Below is listed the major mitigation methods with regards to tourism. Where further mitigation is noted as being listed in other chapters these have been taken into account.

Noise Disturbance

- Undertake construction, wherever possible, outside of the peak tourist season (April to September) to minimise disruption to visitors.
- Avoid areas of key tourism e.g. the cliffs on the South coast

For all Noise mitigation measures see the chapter 17.

Seascape

- Use designs that are not surface piercing or are only slightly above sea level.
- Undertake construction, wherever possible, outside of the peak tourist season.

For full seascape mitigation see the Seascape chapter (chapter 19).

Safety and Collision Risk/Restriction of Access

- Avoid key cruise routes and water sports areas.
- For shoreline devices avoid recreational areas
- Where possible facilitate access through arrays for sailing and water sports, using suitable safety features such as lighting, netting and buoys.

For full collision risk mitigation see chapter 15.

Water and Sediment Quality

- Avoid areas of known contamination in the marine environment
- Avoid sensitive areas and key tourist beaches such as the “blue flag” beaches

For full water quality risk mitigation see chapter 6.

Disturbance to Wildlife

See the Marine Mammals, Birds and Pelagic Ecology sections for full lists of mitigation measures.

Energy Extraction Affecting Beaches

For full mitigation measures relating to energy extraction in the marine environment see chapter 5.

16.8 Confidence and Knowledge Gaps

The general confidence of the effects of marine renewables on tourism is low for the main reason that no-one knows how tourists will react to the installation of devices. It is completely unknown if people would be put off coming to Guernsey during construction, or conversely be interested and so increase tourism. It is also unknown if tourism would see a short term fall/rise in tourists or a longer term trend. These can only really be discovered by deploying devices or monitoring areas where devices are deployed to ascertain trends.

There is a knowledge gap as to how tourism affects Herm and Sark with numbers per year and the GDP effects not estimated for this report. Also, while the cliff paths and other walking routes are well known, it is unknown how many tourists walk along specific paths.

Water sports are a growing tourist attraction, with companies such as Outdoor Guernsey and Guernsey Surf School making it easy for people to give new sports a try. While it is known that these tend to use the west coast, for ease of access and in the case of surfing the best resource, it is unknown exactly how many people come over to Guernsey with participating in water sport in mind.

16.9 Residual Effects

Table 16.9.1 below highlights the likely residual effects on the significance of an impact on tourism following the mitigation measures suggested above and in the relevant chapters.

Table 13.9.1 – Potential residual effects following mitigation

Potential Effect	Device Characteristic	Development phase	Receptor	Significance of effects	Likelihood of Occurrence	Residual Significance after Mitigation	Confidence
Noise Generation during Construction / Operation	All devices and cables	Installation Decommissioning Operation	Wildlife Watching, Relaxation Tourism	Moderate Moderate	Medium Low	Minor Minor	Medium Low
Changes to Seascape	All devices and cables	Installation Operation Decommissioning	Walking, cycling, Site Seeing, water sports	Minor	Low	Minor	Low
Safety and Collision risk	All devices and cables	Installation, Operation, Decommissioning	Water Sports, Sailing	Moderate	Low	Minor	Medium
Restriction of access	All devices and cables	Installation Operation Decommissioning	Water Sports, Sailing	Moderate	Medium	Minor	Medium
Water Quality	Wave and Tidal Devices	Installation Operation Decommissioning	Wildlife Watching, Bathing, Water Sports	Moderate	Low	Minor	Medium
Disturbance of Wildlife	All devices and cables	Installation Operation Decommissioning	Wildlife watching	Moderate	Medium	Minor	Low
Energy Extraction Affecting Beaches	All devices	Operation	Sight Seeing, Walking, Bathing, Water Sports	Minor	Low	Unknown	Low
Creation of Tourist Attraction	Wave and Tidal	Operation	Sight Seeing	Minor Positive	Medium	Minor Positive	Medium

16.10 Recommendations for Survey and Monitoring

It may be beneficial to get tourists views on marine renewable energy on the island. This could be achieved by providing optional surveys at the airport and harbour in arrivals and departures areas. This would be an unobtrusive method of gathering the data in a place where there can be time spent waiting.