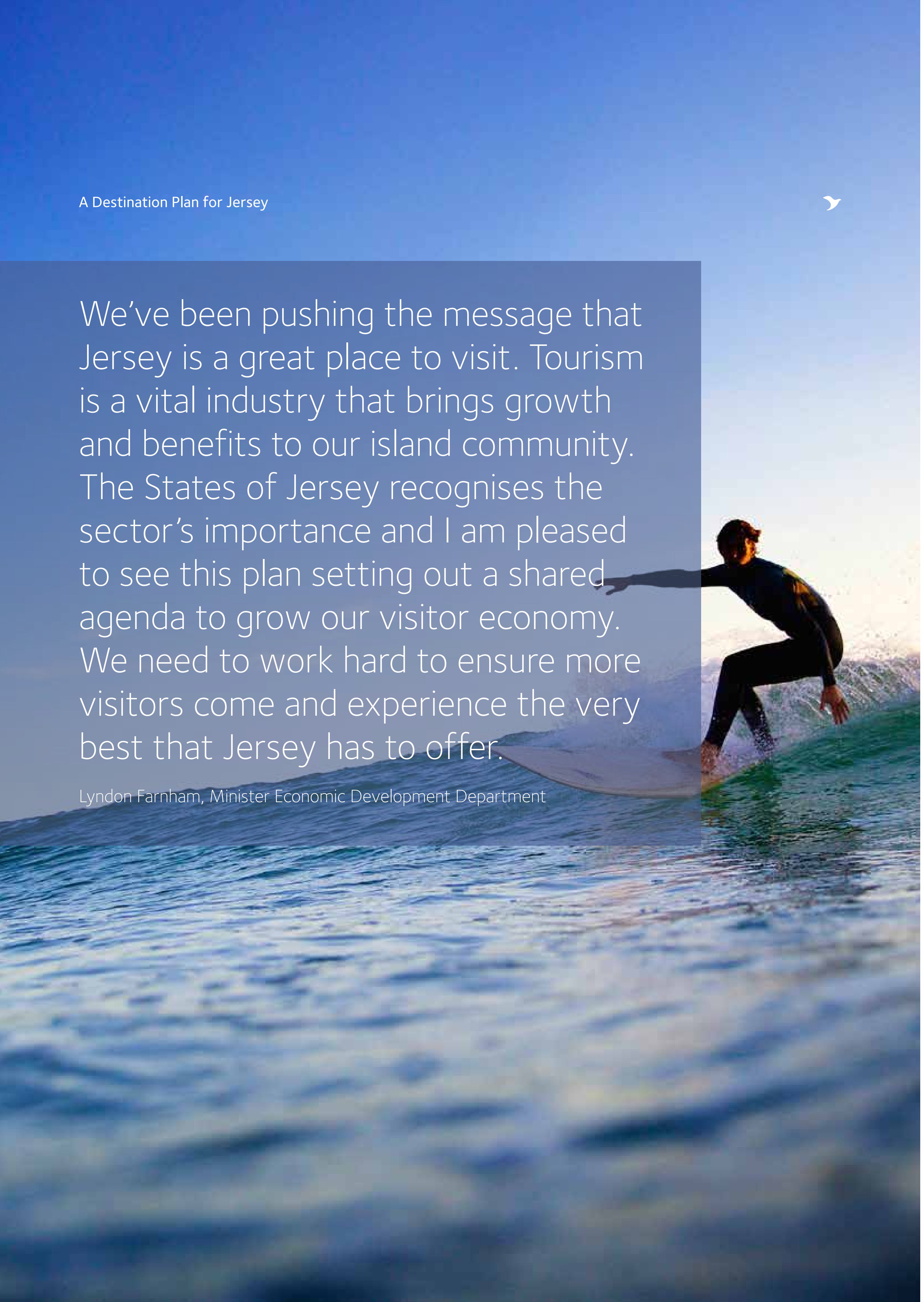
visit Jersey

A destination plan for Jersey



We've been pushing the message that Jersey is a great place to visit. Tourism is a vital industry that brings growth and benefits to our island community. The States of Jersey recognises the sector's importance and I am pleased to see this plan setting out a shared agenda to grow our visitor economy. We need to work hard to ensure more visitors come and experience the very best that Jersey has to offer.

Lyndon Farnham, Minister Economic Development Department

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1.

Jersey is in a global race and the competition is getting tougher. Across the world countries are working hard to deliver growth and jobs. Our competitors are moving fast and we want to go further and faster.

Partnership working can help us to achieve economic growth across all our sectors. Government is already working with voluntary organisations to deliver services; we also need to work with promotional bodies like Locate Jersey and Jersey Finance, to tell the whole Jersey story to the outside world.

The tourism sector, through its hotels, restaurants and transport links, contributes to the island's economy and complements other sectors. The high quality restaurants, accessible heritage and stunning natural environment enhance the quality of life for residents and present an attractive proposition for inward investment and for the people with the skills a small island will always need to import.

I welcome this plan, which sets out how all of us, in the private and public sectors, can work together to build a vibrant and sustainable tourism industry that complements Jersey's other industries and remains a valued part of our wider economy. During this term of office we will do as much as we can to promote Jersey as a great place to visit, work and live.

Senator Ian Gorst
Chief Minister

2.

We've been pushing the message that Jersey is a great place to visit. Tourism is a vital industry that brings growth and benefits to our island community.

The States of Jersey recognises the sector's importance and I am pleased to see this plan setting out a shared agenda to grow our visitor economy. We need to work hard to ensure more visitors come and experience the very best that Jersey has to offer. I encourage you to read this document and join the public-private partnership and work together to put our island's tourism economy on a dynamic growth path.

Lyndon Farnham
Minister Economic Development Department

3.

Why Jersey? Tourists have plenty of choices when considering destinations and we must work hard to keep Jersey prominent in the minds of potential visitors.

By "we" I mean Visit Jersey of course, but the local industry also understands it plays a vital role in promoting the island and it is equally important that the whole community recognises the value of tourism, not only in vital economic terms, but also as part of the social infrastructure. Tourism creates employment in hospitality, transport, attractions and all the small enterprises engaged directly and indirectly in the sector. This creates wealth and facilities from which everyone benefits.

In facilitating the creation of Visit Jersey the States sought to ensure the island can compete effectively in a hugely competitive global marketplace. This plan presents a 'Total Tourism' approach, embracing industry and government in a joint commitment to making the most of every opportunity. The success of Jersey's tourism industry depends upon action on both the supply and demand sides. It would be pointless creating new demand if Jersey does not have the products or productive capacity to meet it. This plan addresses both issues. I believe that tourism to Jersey will grow. We can continue to provide visitors with unique and unforgettable experiences. Together we can realise the full Jersey tourism potential.

John Henwood
Chairman Visit Jersey

> The success of Jersey's tourism industry depends upon action on both the supply and demand sides. It would be pointless creating new demand if Jersey does not have the products or productive capacity to meet it.
>
> John Henwood,
> Chairman Visit Jersey

Executive summary

During May-June 2015 a Visit Jersey online Stakeholder Consultation Survey received 177 individual responses. 98% of those who responded showed overwhelming support for a Jersey Destination Plan.

This Jersey Destination Plan (JDP) sets out future priorities and activities in a systematic way to grow Jersey's visitor economy. It is a shared statement of intent setting out a direction over the next five years and contains priorities and identifies stakeholders responsible for their delivery.

98% of those who responded showed overwhelming support for a Jersey Destination Plan.

Why bother?

- Supporting Jersey's visitor economy is more than a marketing campaign. A JDP embraces the whole range of activities aimed at strengthening the quality of the visitor experience and performance of our tourism businesses
- There is a need to address fragmentation. Many organisations, public and private and voluntary need to work together to deliver the visitor experience
- Ensure best allocation of resources. A JDP will help find what the real needs and priorities should be so that financial and human resources can be used most effectively
- Strengthening the visitor economy will benefit Jersey residents who also take advantage of restaurants, arts and entertainment, etc. Jersey becomes a better place to live, work, and for attracting inward investment
- Strengthening and marketing Jersey's image as a destination can help attract new businesses and investment across all sectors
- A healthy visitor economy is important to other parts of Jersey's economy which supply it, such as food producers, maintenance services, etc.
- Win more resources. Well researched and evidence-based arguments can strengthen the case for funding and help identify new projects for support

There are four drivers of tourism growth:

Market development

Target best prospects to increase volume & value of the Jersey visitor economy

Image development

Develop and promote "reasons to visit" Jersey

Access development

Make it easier to get to and around Jersey

Destination development

Create, package and deliver compelling visitor experiences

This JDP describes a long-term whole of government-industry accord with all participating in creating the conditions for growth as well as being responsible for delivering specific activities.

21 recommendations are proposed which collectively will help drive sustainable growth in Jersey's visitor economy.

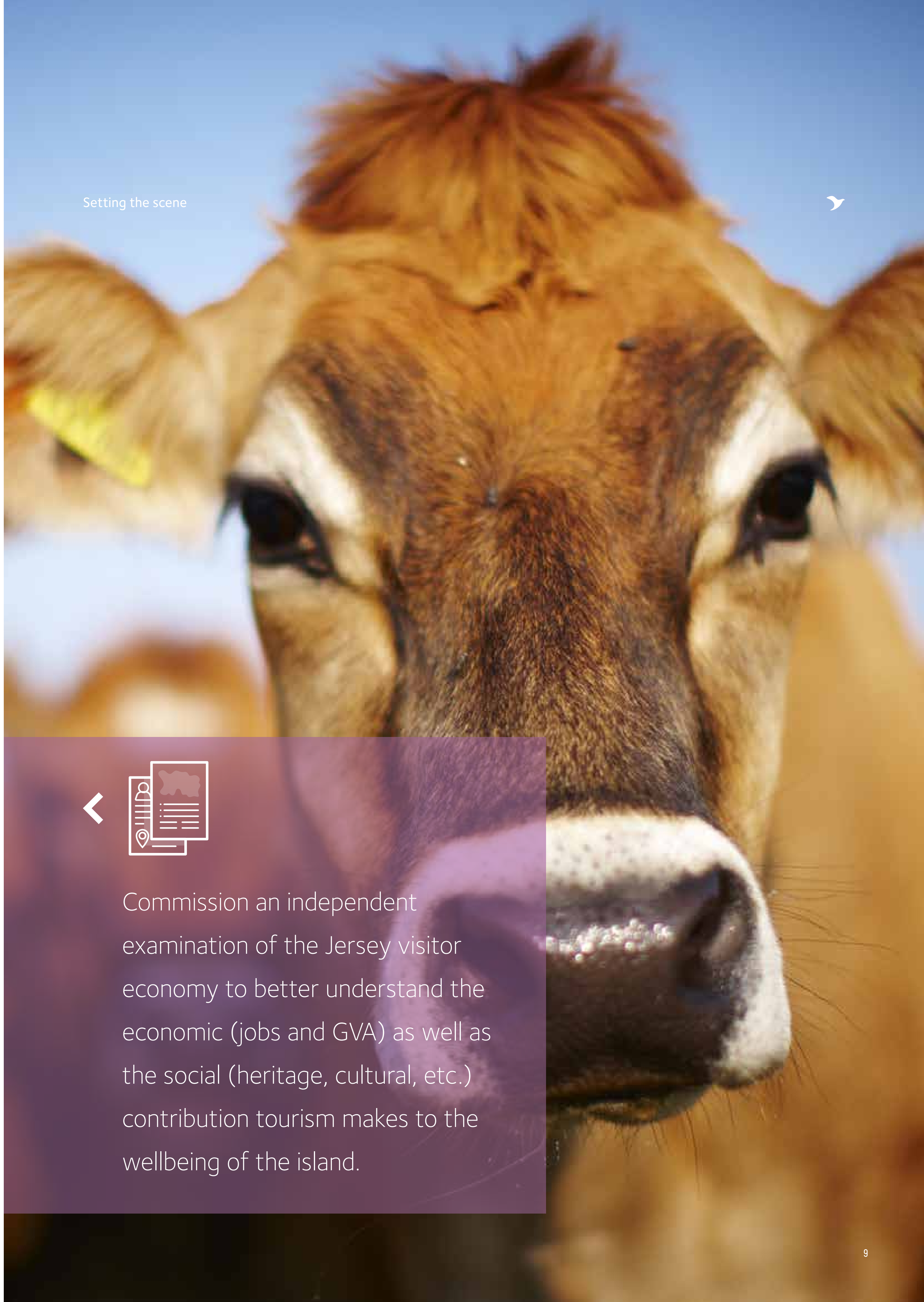
The Government's stance

Jersey is an economy connected and open to the world. In 2012 (States of Jersey Tourism Strategy Consultation) government began to consult on how the Jersey visitor economy could contribute to growing the economy and maximise the sector's long term contribution to our economy. A detailed analysis was conducted by Oxera Consulting which reviewed the situation and offered a number of policy options. Since then a Shadow Tourism Board was set up and Visit Jersey was incorporated on 30th March 2015 to lead the island's tourism efforts.

According to the 2014 States of Jersey Measuring Jersey's Economy Report, hotels, restaurants and bars delivered £149m Gross Value Added (GVA); 3.8% of the island's total. This significantly undercounts the contribution tourism makes to Jersey's economy since swathes of the tourism industry such as attractions, cultural venues, transport and retail are not included.

The States of Jersey delivers directly or indirectly a full range of services; planning, transport, environmental management, leisure and recreation, culture and the arts. These all support the visitor economy on the one hand and are supported by it on the other. By showing how these link the JDP can prevent tourism being treated in a silo, rather than as a core contributor to economic development.

Recommendation 1 – Action	Lead Partners	Outcome or success measure
Commission an independent examination of the Jersey visitor economy to better understand the economic (jobs and GVA) as well as the social (heritage, cultural, etc.) contribution tourism makes to the wellbeing of the island	VJ	• Document published in first half of 2016
Engage with relevant government departments and agencies to highlight how policy decisions can impact the visitor economy	VJ, EDD, other government departments	• Tourism's needs reflected in government decisions • Jersey Visitor Economy annual conference to gauge progress and refresh the JDP



Demand factors

Globally the number of international tourism trips has risen by 40% since 2005, from 809 million to 1.135 billion in 2014. In US dollar terms the amount that destinations earn from international visitors has jumped 78% before inflation.

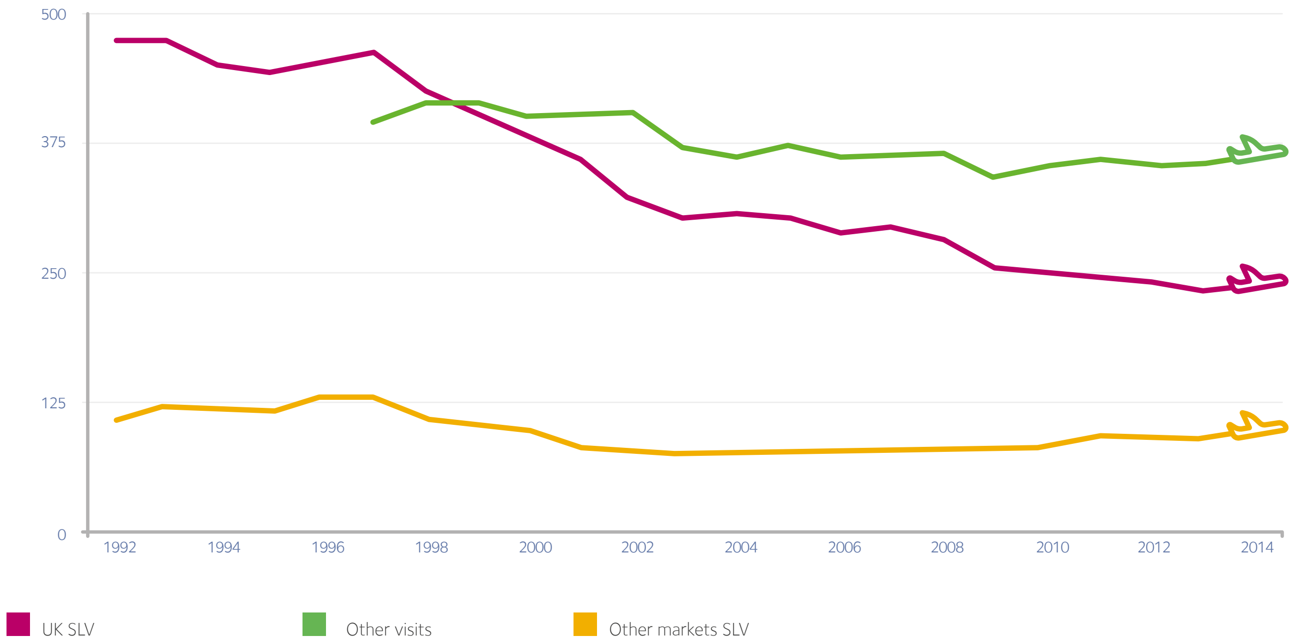
Jersey welcomed 701,000 visits during 2014. These visits generated just shy of £232m worth of on-island spending, equivalent to £2,300 per island resident. In nominal terms the amount spent has increased by 5% since 2005.

Staying Leisure Visits (SLV) is the leading trip type. Over the past couple of decades the steady decline in visits to Jersey has been driven by falls from the UK Staying Leisure Visits market. It has halved since 1992. By contrast, Staying Leisure Visits from other markets has declined by just 11% over the same period.

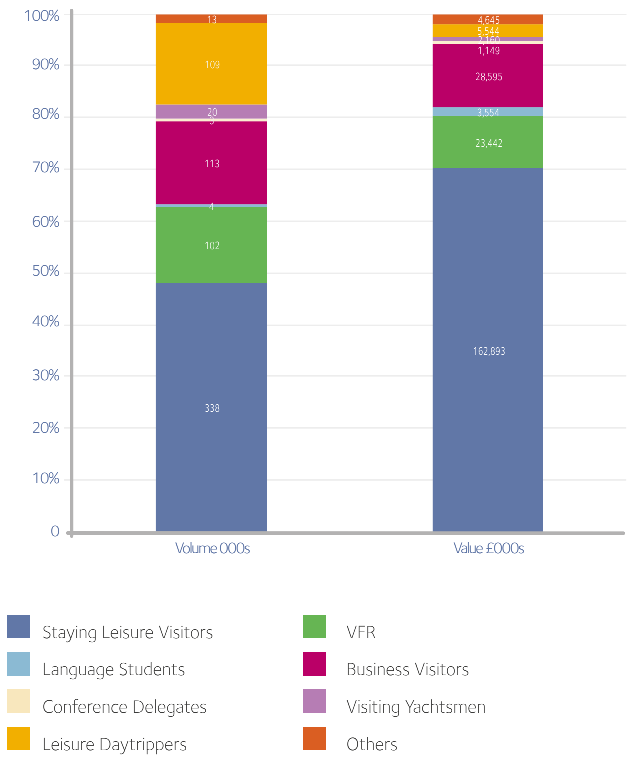
The following charts illustrate changes to the volume and value of tourism to Jersey. France and Other Channel Islands over-index on volume (i.e. have below par spend per visit) and Germany and Others over-index on value.

From 1997 to 2014 Staying Leisure Visits, Leisure Day-Trippers and 'Others' declined. There has been volume growth in Visiting Friends and Relatives (VFR) and Business Visits. Among the major markets only Other Channel Islands has grown in volume terms since 1997. So despite the more recent 'good news' in terms of Germany, the German visitor number is not back to where it was in 1997.

Visits to Jersey (000s)

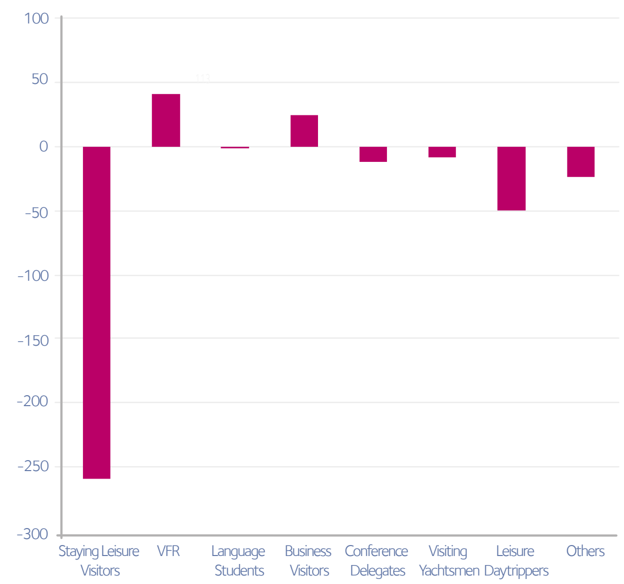


Volume and Value of Jersey Tourism by Purpose 2014

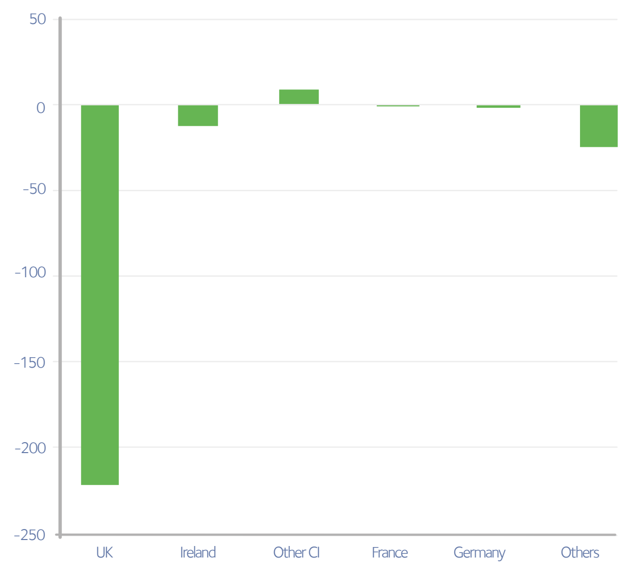


Volume and Value of Staying Leisure Visits by Market 2014

Change in number of Total Visits by Purpose 1997-2014 (000s)



Change in Staying Leisure Visits by Market 1997-2014 (000s)



The healthiest long-term growth has come from Visits to Friends and Relatives (VFR) which is up by two-thirds on its 1997 levels. The number of Leisure Day-Trippers was on a downward trajectory for much of the past decade but has plateaued around 100,000 visitors in recent years.

Since 2005, in broad terms, the Business Visitor segment has remained stable also at around 100,000 visits per annum. But in the first half of 2015 we welcomed 8.5% more Staying Business Visits than during the same period of 2014. On a rolling year basis this is the best first half for business tourism since before the Global Financial Crisis in 2008.

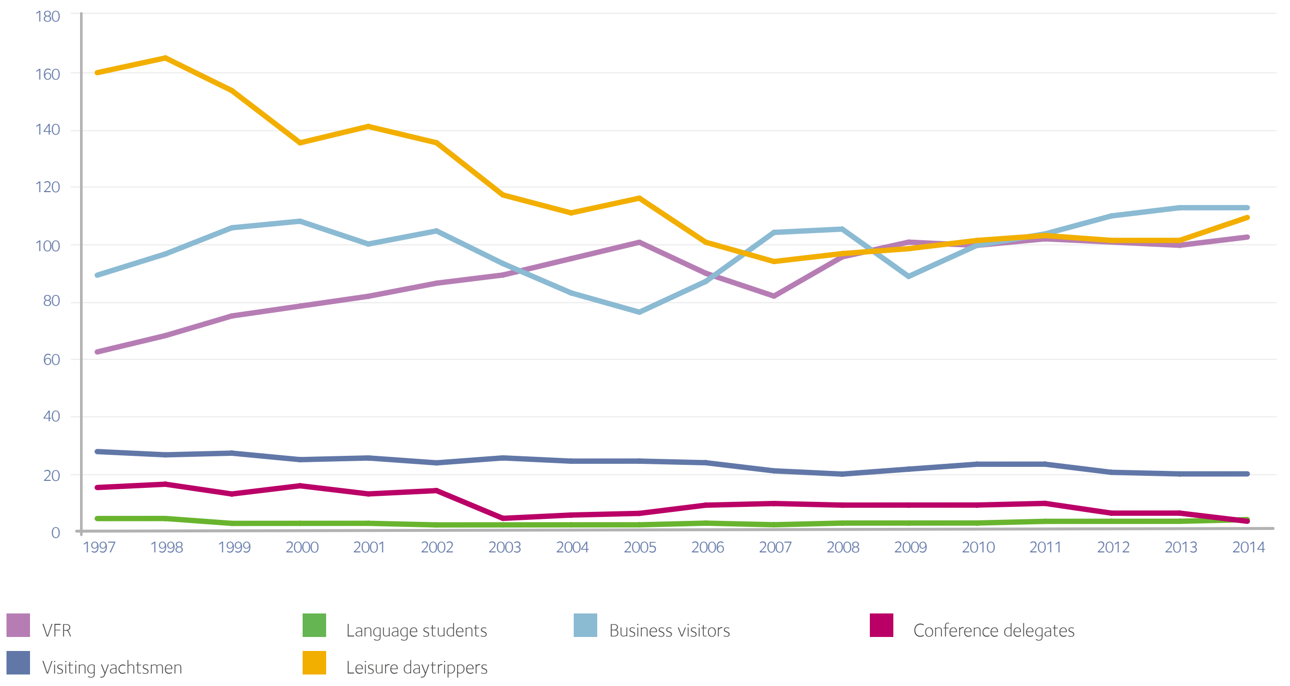
3,080 conference delegates visited Jersey in 2014, which was 48% down on 2013 and the total spend for this sector was £1.1m. There has been a five year-on-year decline in this segment.

Leisure travel is concentrated into five months; business-related travel is more evenly spread across the year. 71% of Staying Leisure Visits takes place between May and September. August accounts for 18% of all Staying Leisure Visits. Although lower in terms of volume, Business Visits fill beds throughout the year.

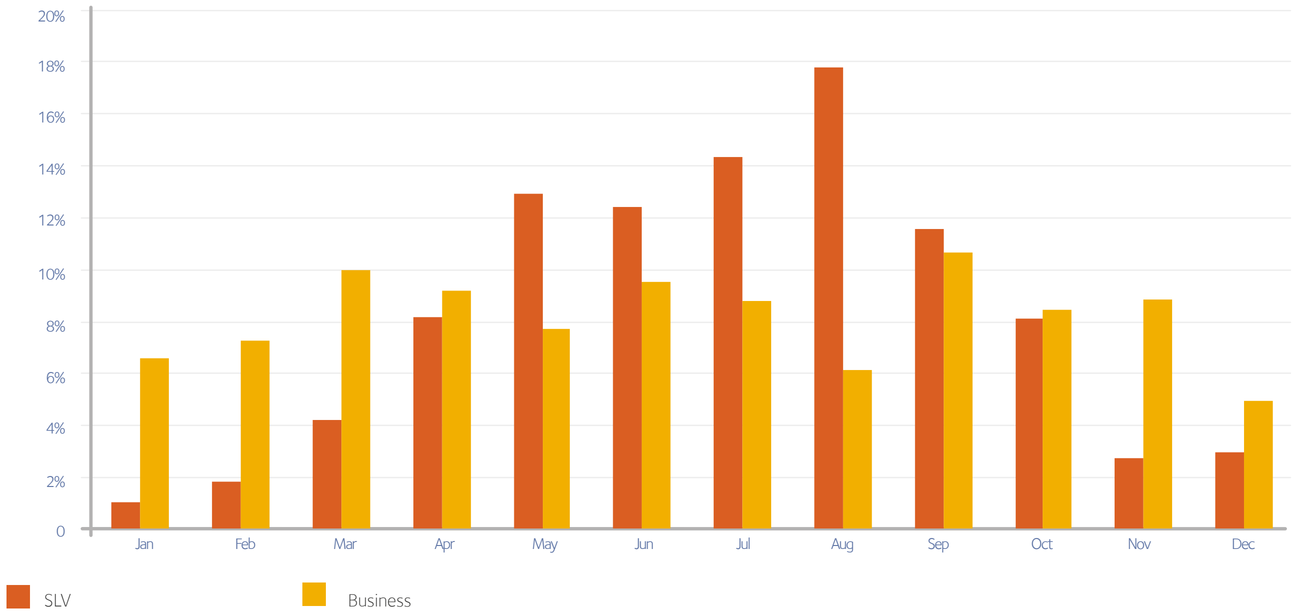
Jersey offers a diverse range of products and interests and is too small to focus on one particular group or segment of the market. By expanding through a range of ages and interests this would offer an opportunity to numerous segments of the market, thereby extending the period of visits throughout the year to cover more than just summer seasonal activities, which has largely been the focus in the past.

Laurraine Falle,
Feast & The Yard

Visits by purpose excluding SLV (000s)



Seasonality



The UK market – headline statistics 2014

- 239,980 Staying Leisure Visits
- 71% of Staying Leisure Visits are from the UK representing 79% of all bed nights
- 102,220 Visiting Friends and Relatives
- Average length of stay is 4.6 nights
- Worth £121m
- Spend per staying leisure visit of £502

The amount spent by Britons on domestic overnight trips within Great Britain has risen by just 3% (before inflation) since 2005, while the number of trips has fallen by 16%.

The German market – headline statistics 2014

- 15,000 Staying Leisure Visitors in 2014, up 40% compared with 2010
- Contributes £12m annually to the Jersey economy
- 80% of German visitors are first time visitors, compared to 59% for France and 46% UK
- Average length of stay is 6 nights
- 70% of German holiday makers book packages from tour operators and travel agencies
- Germans spend £802 per Staying Leisure Visit. This is the highest on-island expenditure compared to any other market. It is over 60% more than the spend per visitor from the UK and 185% more than from French visitors
- The German market is dependent on tour operators' charter sentiment from key German source cities

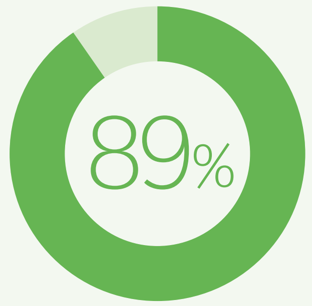
Germans are the world's third most valuable source market for international tourism, worth $91bn in 2014. Although the majority of German visitors to Jersey are on their first trip to Jersey, Germany is home to 80 million people, the vast majority of whom take foreign trips. So the number of Germans with first-hand experience of Jersey is tiny. There are over 4 million Germans aged 55-65 who are active, enjoy travelling, are interested in nature and have good disposable income.

Increasing demand from Germany has come as a result from marketing campaigns and close cooperation with German airlines and the travel industry. Increased demand this year led to an extension of the charter flight period from the end of April until mid-October. And for the first time, there were nonstop flights from different cities to Jersey without stopovers in Guernsey, as in previous years.

There is a real opportunity for sustained future growth from Germany.

The French market – headline statistics 2014

- 39,000 Staying Leisure Visits
- Staying Leisure Visits generated £11m of on-island spending
- A significant proportion of the 109,000 Leisure Day-Trippers
- 89% of Staying Leisure Visits last for between 1 and 3 nights; average length of stay is 2 nights
- Spend per Staying Leisure Visit is £281
- 41% travel from Bretagne, 14% Paris, 15% Normandy and 17% from Loire



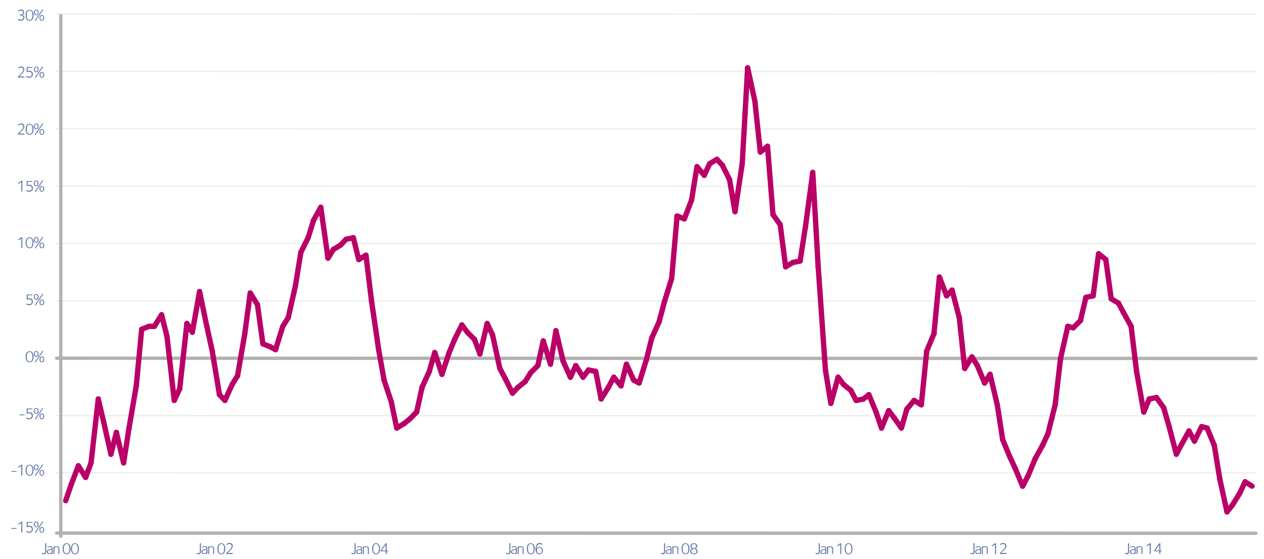
89% of Staying Leisure Visits last for between 1 and 3 nights; average length of stay is 2 nights.

The French market is dominated by day-trippers and short-stay visits. This accounts for the comparatively low spend per visit. The opportunity is to convert day trippers into future staying visitors.

UK, Germany and France – key comparisons 2014

	UK	Germany	France
Staying Leisure Visits - Spend (£000s)	£120,500	£12,008	£10,973
Staying Leisure Visits - Visits	239,980	14,980	39,010
SLV growth pa 2009-14	-3%	9%	3%
Spend per SLV	£502	£802	£281
Nights per SLV	4.6	6.0	2.0

Annual change in cost of €s for Britons



A major factor sitting behind destination choice is what is happening to exchange rates. Brits are currently able to buy around 10% more euros with their sterling than a year ago. This means Euro-denominated destinations are potentially more competitively priced than Jersey. The other side of this coin is, of course, that Eurozone citizens are finding sterling more expensive. A Jersey holiday is therefore more expensive for Euro-based individuals.

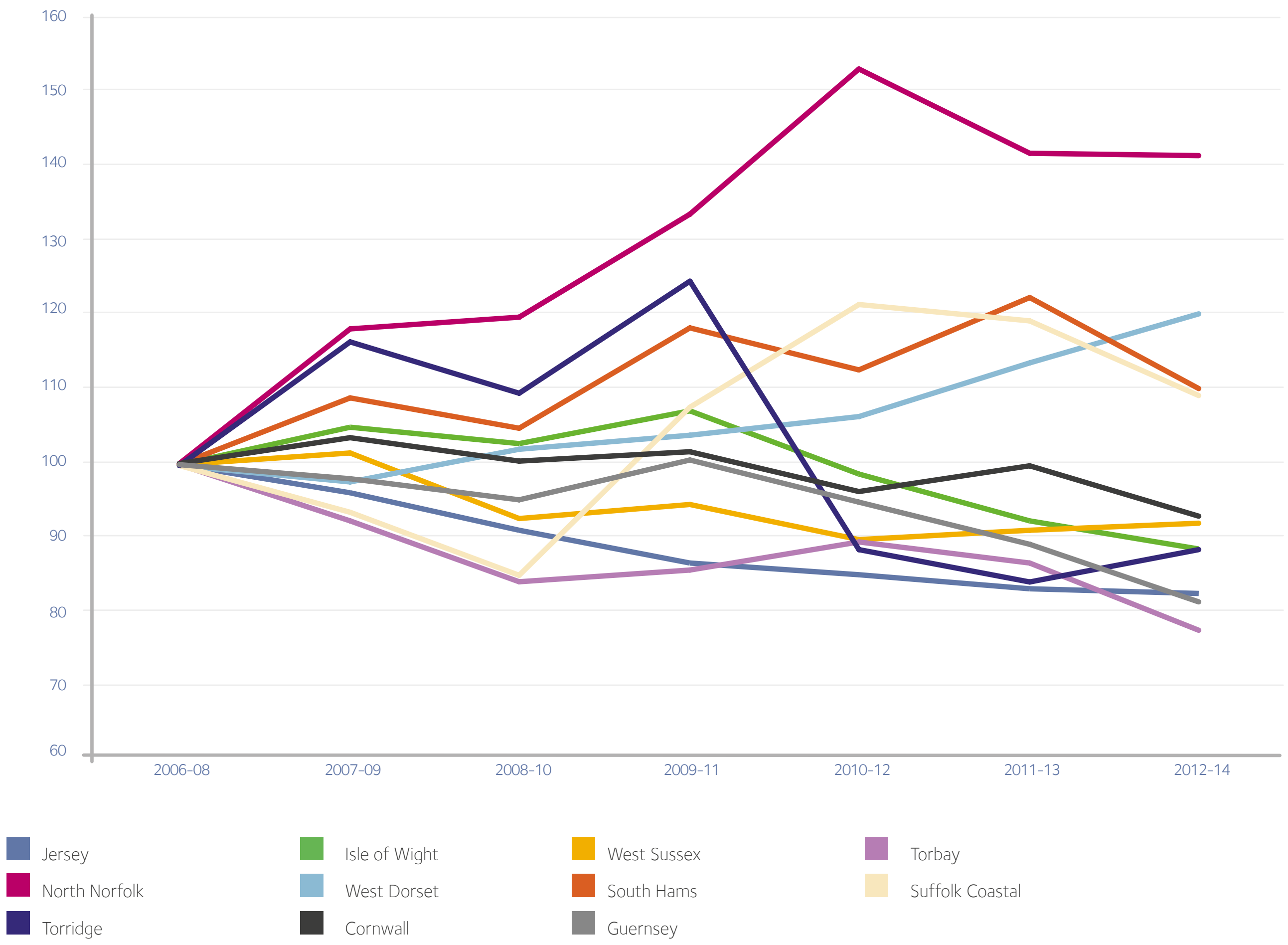
Competition – Jersey's relative position

Whereas global international tourism is characterised by sustained long-term growth; Jersey has seen a different trend over the past two decades.

UK residents make up seven-tenths of the market for Staying Leisure Visits. The next chart therefore concentrates on trends in holiday trips by Britons to Jersey and to areas of England which have some broad similarity to Jersey in that they are coastal and are a relatively long distance from the major conurbations. Guernsey is also included in the analysis, but please note that the Guernsey trend is based on all trip purposes from the UK to Guernsey and not just leisure visits.

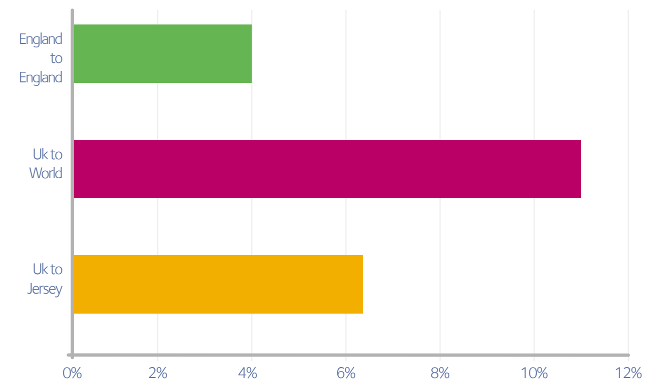
As market sizes vary by destination the number of holidays in the period 2006-8 has been indexed to 100 in order to help comparisons. The destinations enjoying the healthiest growth have been North Norfolk and West Dorset. Jersey has an index of 82 for the period 2012-14, only ahead of Torbay. Although showing more volatility over time than Jersey, it is clear that over the period under review, both Guernsey and Jersey have seen a decline of similar magnitude.

Destination of holiday visits by UK residents (2006-8 = 100)



There is more encouraging news in the recent past. Staying Leisure Visits to Jersey from the UK have outperformed domestic overnight holiday taking within England for the period January to July 2015, but as is evident from the chart outbound holiday trips from the UK to international destinations are seeing the swiftest growth.

Year-to-date growth in Holiday Trips



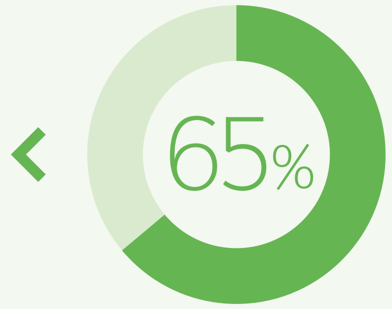
Supply factors

Lodgings

Between 1992 and 2014 Jersey witnessed a marked decline in accommodation stock:

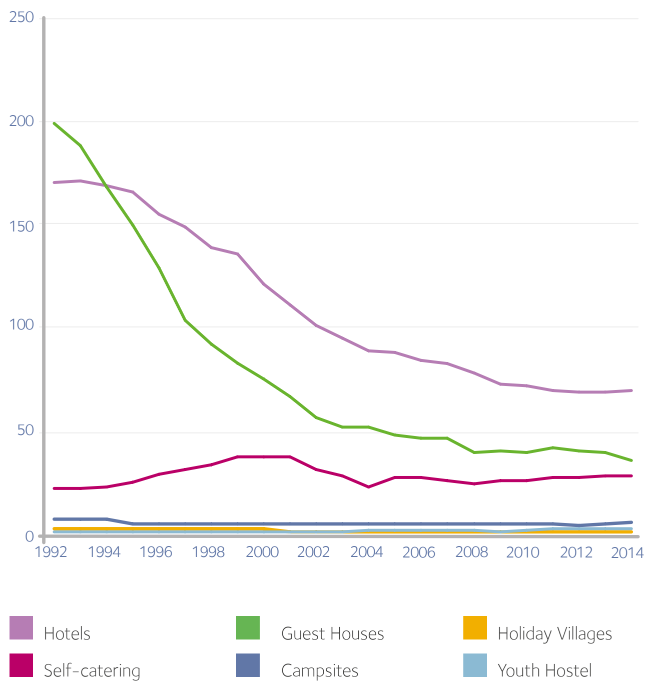
- number of establishments reduced by 65% from 393 to 139
- number of bed spaces available diminished by 53% from 24,770 to 11,554

Hotels account for 75% of all rooms on the island compared with 68% in 1992. Guest Houses now represent 8% of all bed spaces, down from 17% in 1992. The following brace of charts show trends in both the number of establishments and the number of bed spaces.

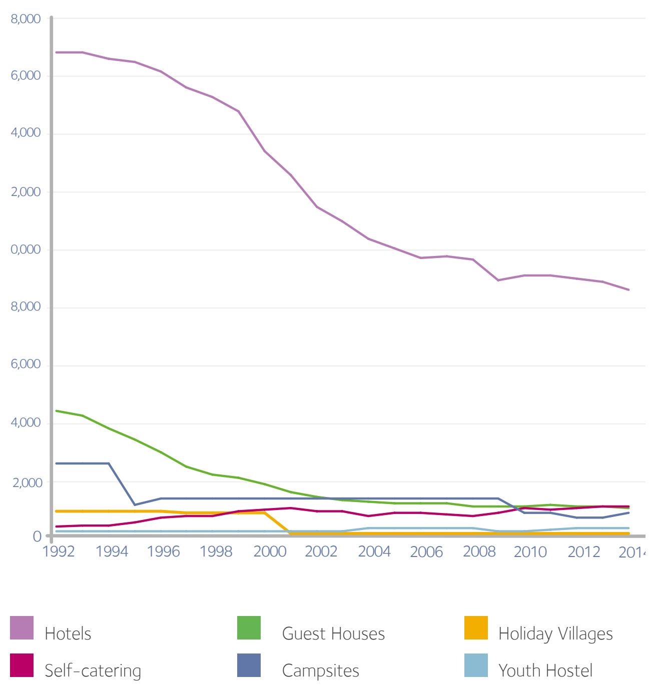


number of establishments reduced by 65% from 393 to 139.

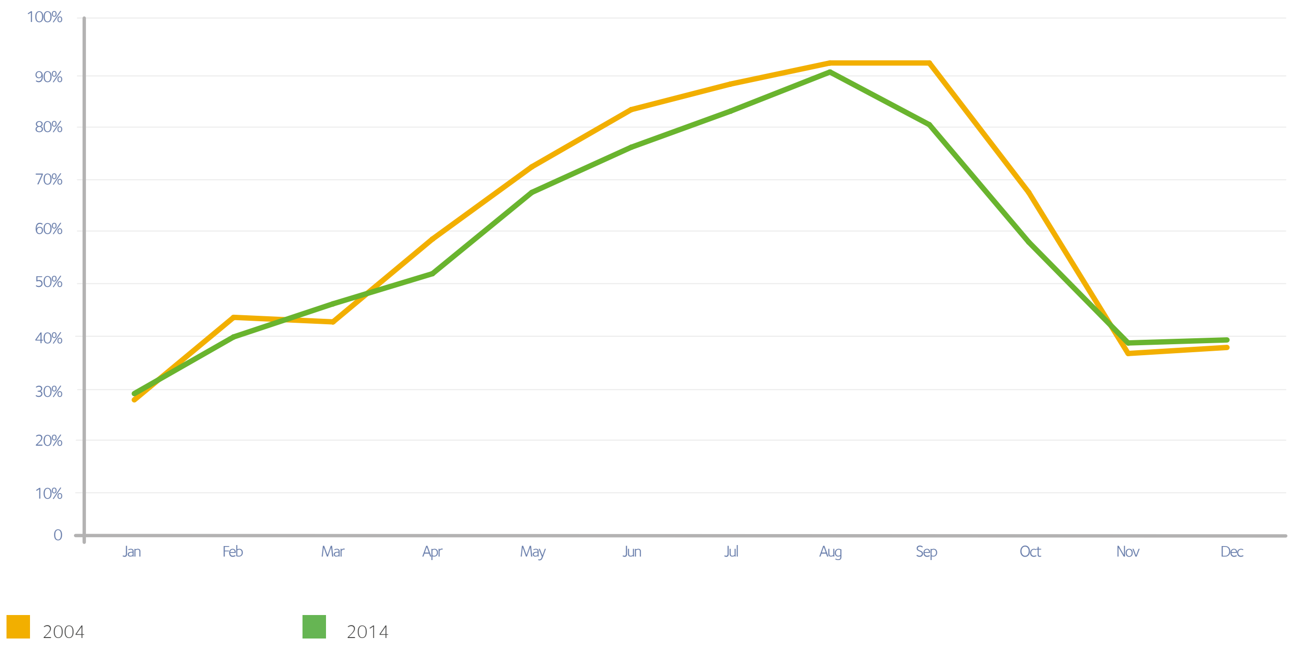
Accommodation establishments



Accommodation establishments bedstock



Room occupancy rates



Looking at the productivity of the accommodation sector it is possible to see that room occupancy during the peak summer months was consistently lower in 2014 than it had been a decade before, but there was little difference in the quieter winter months.

Over time there has been a reduction in the average number of nights per visit for Staying Leisure Visits. The typical leisure visit:

- in 1992 lasted 6 nights
- in 2003 lasted 5 nights
- in 2014 lasted 4.2 nights

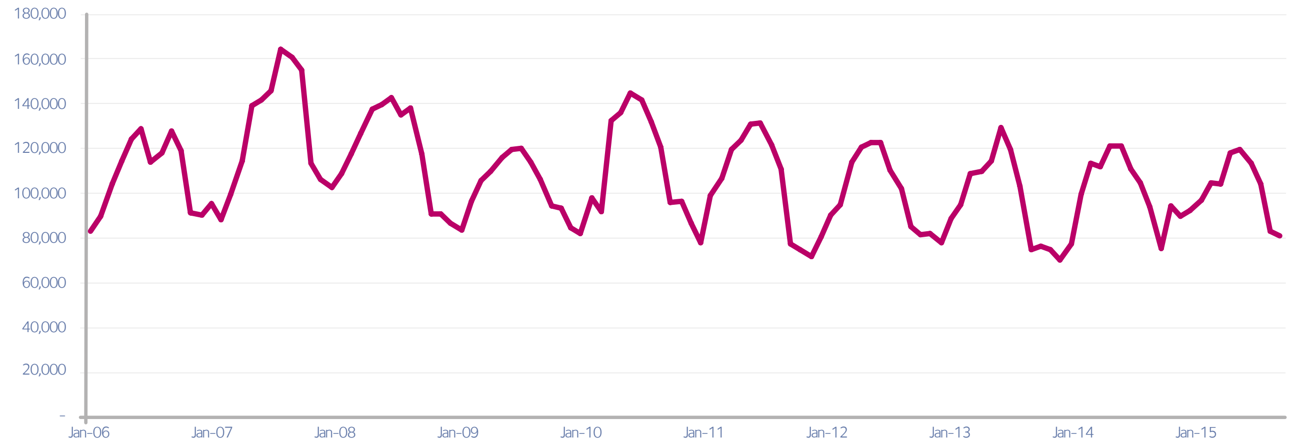
Accounting of all rooms and beds actually available in 2014 for booking:

- average room occupancy was 63%
- average bed space occupancy was 53%

Flights

Seat capacity to Jersey Airport is highly seasonal. July or August is always the 'busiest' month and February the 'quietest' (capstats.com data covering scheduled flight operations but excluding charter traffic). All figures below are the number of airline seats, not the number of passengers to give a sense of the extent of supply.

Monthly seat capacity to Jersey Airport



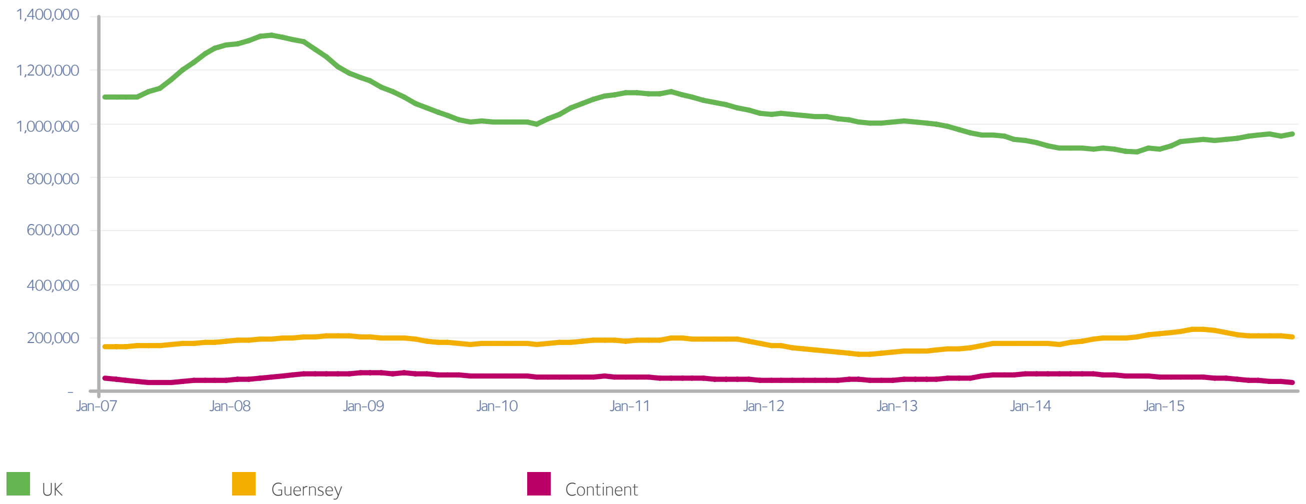
To better appreciate the underlying trend in seat capacity the following chart shows the annual tally on a rolling twelve month basis. The picture is one of stability since early 2013 with around 1.2 million seats being available during any twelve month period.

Rolling 12 month seat capacity to Jersey Airport

The bulk of flights are flown from UK airports, followed by flights from Guernsey and then continental Europe. Seat capacity from UK airports has witnessed a gentle upward trend during 2015 but has not yet reached the one million seats in a twelve month period, last achieved year ending March 2013.

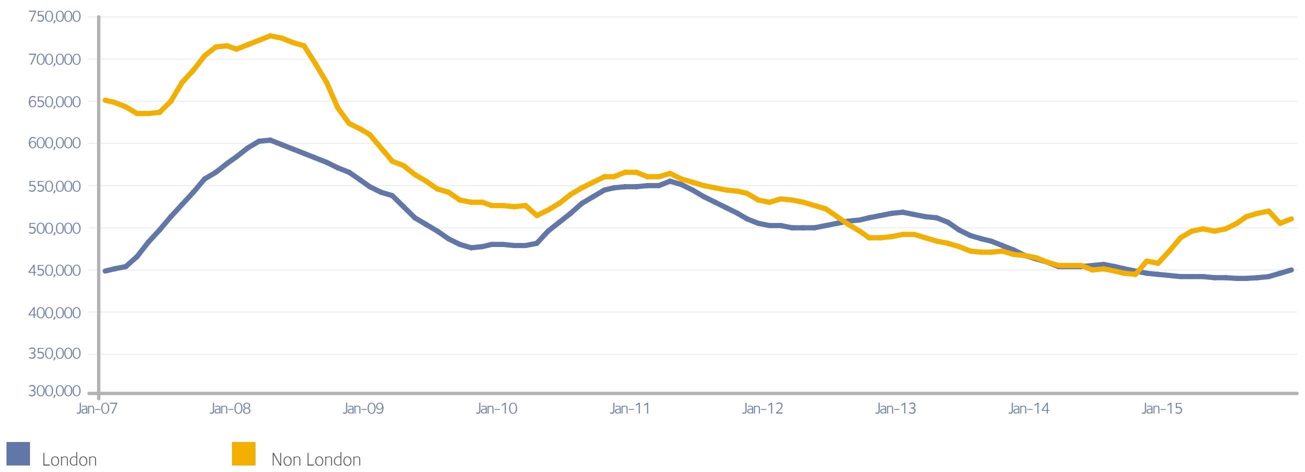
Seat capacity from Guernsey (and Alderney) has remained broadly stable at about 200,000 seats per annum. The recent decline in seats from continental European airports is accounted for by the withdrawal of Blue Islands flights from Paris, Amsterdam and Zurich.

Rolling 12 month seat capacity to Jersey Airport



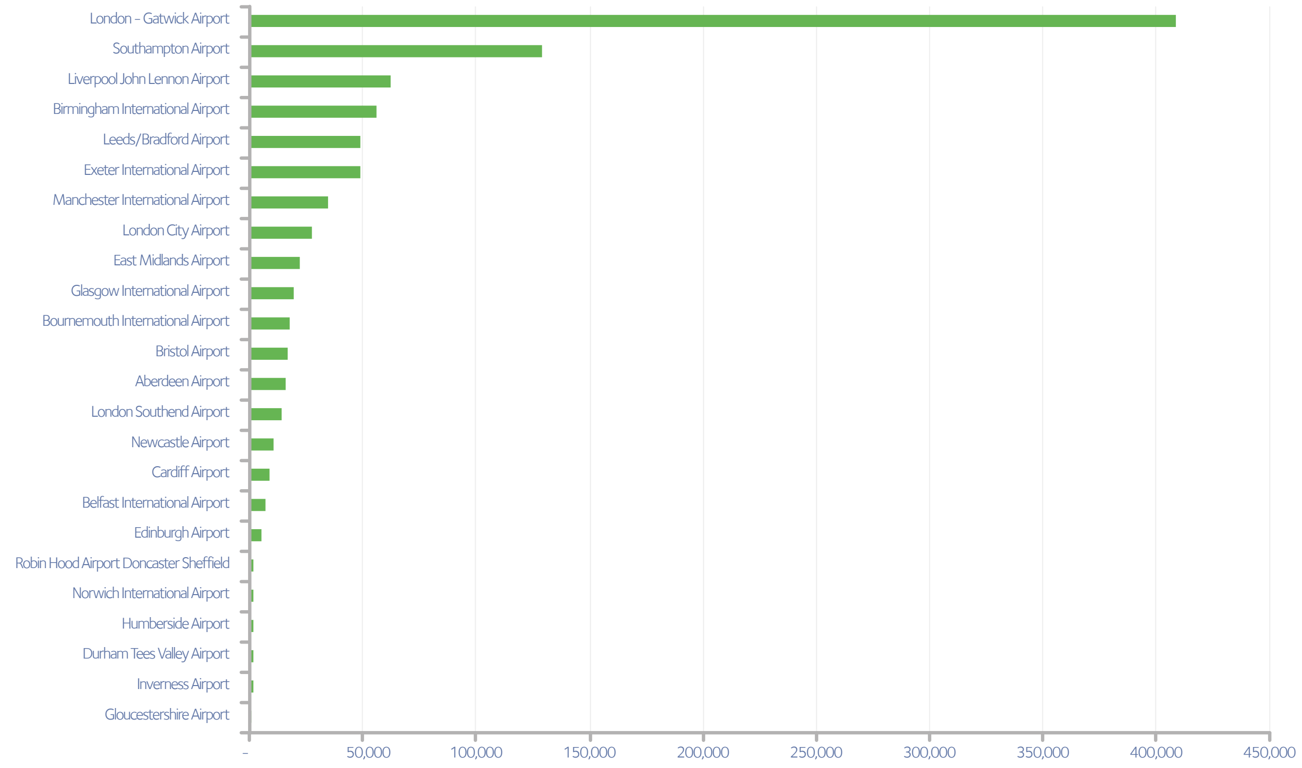
The next chart explores the number of seats available from UK airports split between London and non-London airports. Apart from a period during 2013 there has typically been more seats flown from airports outside of the London area, but it is apparent that London supply is somewhat less volatile than that from other regions. Non-London seat capacity broke through the 500,000 level (during a rolling twelve months) for the first time since 2012 in the summer of 2015.

Rolling 12 month seat capacity to Jersey Airport



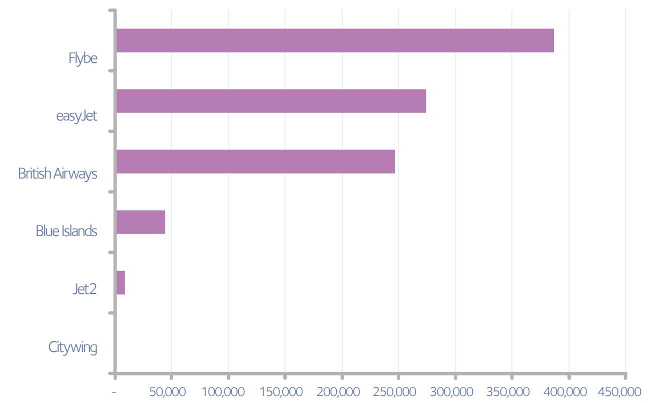
The next two charts take a look at seat capacity from the UK by individual origin airport and by carrier. London Gatwick accounts for 43% of total seat capacity from the UK with more than 400,000 seats during 2015, treble the amount from the next most important airport of Southampton. The only other airports offering more than 50,000 seats during 2015 are Liverpool and Birmingham.

Seat capacity from the UK during 2015



The airline operating the largest number of seats to Jersey during 2015 from UK airports is flybe with just shy of 390,000. Thanks to an increased number of regional connections and regular flights from Gatwick, easyJet is now the second largest carrier in terms of seat capacity on 274,000 ahead of British Airways with 246,000.

Seat capacity during 2015 from the UK by carrier



Potential visitors from continental Europe are able to reach Jersey using scheduled flights with a simple change of planes at either London City or London Gatwick. Now with the recent inception of Gatwick Airport's "GatwickConnects Booking Service" (connecting flights between low cost and full service airlines booked in a single transaction) the most convenient way for many in continental Europe to reach Jersey is courtesy of a charter flight.

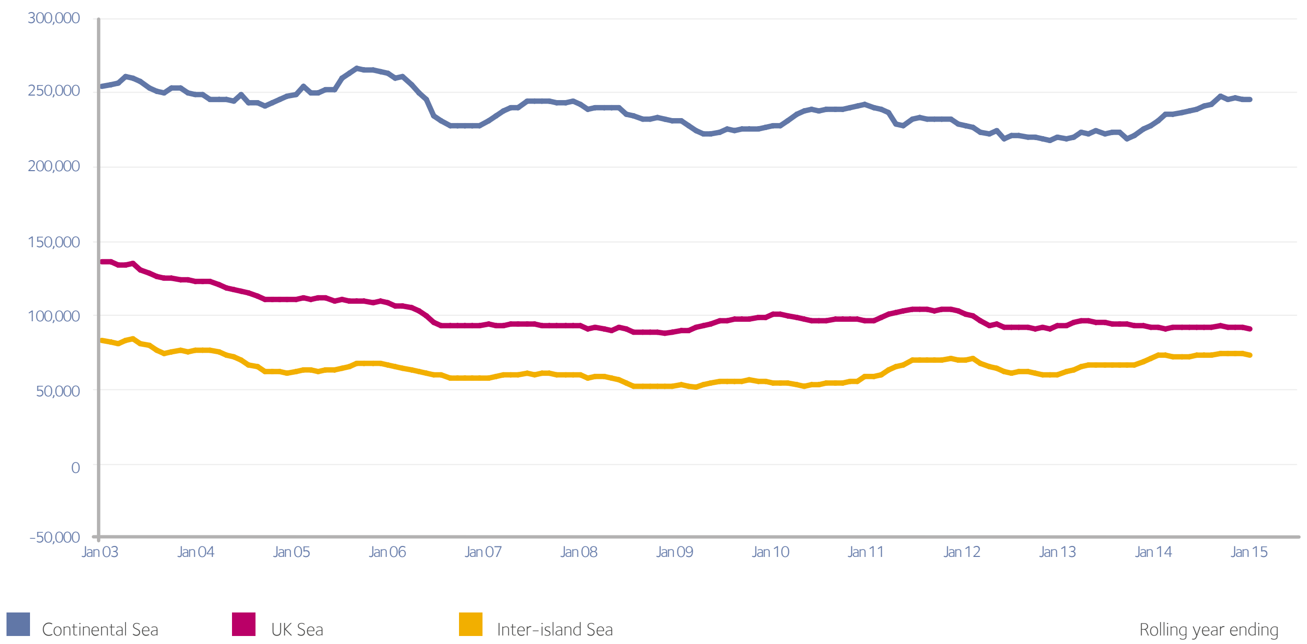
These charter flights often fly from secondary airports, for example Rotterdam. Charter flights appeal to those looking for a hassle-free way of getting to their holiday destination and are particularly attractive to those making their first visit somewhere.

Jersey currently benefits from a range of summer charter flights, typically operating back-to-back on Saturdays, thereby safeguarding a healthy average length of stay. For example, during the month of July 2015 charter flights brought around 400 visitors from Zurich, Vienna and Rotterdam. Summer Saturday flights from German cities such as Stuttgart, Munich and Dusseldorf, which are mostly dependent on package groups, brought 1,520 visitors in July.

Blue Islands is reducing the number of scheduled year-round direct flights from continental Europe to Jersey. Growing charter flight operations with a range of partners will offer an exciting opportunity to grow continental visitor numbers to Jersey.

Ferries

Trends in Jersey ferry arrivals



From the previous chart it can be appreciated that the bulk of sea arrivals to Jersey are from Continental Europe; nearly 250,000 in 2014. This number is not dissimilar to that seen back in 2003.

There are typically around 60,000 inter-island arrivals a year.

The share of all outbound visits by ferries from the UK is around 12%. Since 2002 we have witnessed a 34% reduction in the number of ferry passenger arrivals in Jersey from the UK. This is broadly in line with a 30% reduction in ferry trips made by UK residents over the same period.

In the first half of 2015 the number of arrivals by ferry on UK routes was 5% lower than during the first half of 2014. Compare this with a 7% increase in UK air arrivals for the same period.

Since the end of March 2015 Condor's Liberation replaced the Express and Vitesse meaning that there is only one fast ferry providing services between Jersey and the UK. The Commodore Clipper continues to provide a conventional passenger service from Portsmouth. The change from two to one high speed craft has also meant the withdrawal of services from Weymouth since the port is unable to accommodate the Condor Liberation. The Liberation has a capacity of 880 passengers and 245 cars. The ferries that it replaced- Express and Vitesse- each had a passenger capacity of 741 and 175 vehicles. The Commodore Clipper has a passenger capacity of 500.

Although the new high speed vessel is larger than the two vessels it replaced, resulting in a change to the nature of the deployed capacity in that on peak days there has been a reduction in the number of passengers who can be "at sea" at any one time. This means that very intense use of the Liberation is required in order to accommodate peak demand.

'Luxury Jersey Hotels welcomes the publication of the Destination Plan. It indicates that the management of Visit Jersey echoes the way that businesses in the tourism sector operate, with decisions being based on analysis of the information available. We welcome this as an initial step towards an exciting and positive future for Jersey's tourism industry.

Alex Mallinson,
Luxury Jersey Hotels

Ambition

Build the value of tourism to Jersey, working in partnership with the industry and government to generate additional visitor numbers and spend. Our Vision is of a vibrant sustainable Jersey tourism industry whose contribution to the economy and community at large is widely recognised and specifically to achieve:-

- 1 million visitors before 2030
- A future visitor spend of £500m per annum

> Heroes/advocates, absolutely agree with this part of the strategy to make hospitality/tourism a go-to career.
>
> Daphne East,
> Town Centre Manager

This Jersey Destination Plan covers the period to 2020

	Visitor Number (2.25% pa growth)	Visitor Spend (5% pa growth)	Average Spend per visitor
2014 (actual)	701,000	£232m	£330
2020 (target)	800,000	£310m	£387
2030 (target)	1,000,000	£500m	£500

Where we want to go

The volume target of 800,000 is the aggregate of Staying Leisure Visits, Staying Non-Leisure and Day-Trippers. The growth rate for each is pretty much the same. The spend target is inclusive of assumed growth in inflation which is set at 2.5% pa.

We posit that government and partners on and off island, can cooperate with Visit Jersey to realise this ambition. Our collective priority is to inspire visitors from overseas to choose, visit and explore Jersey and maximise commercial and public returns from our investments.

The following basket of metrics will provide a continuing set of measures to gauge performance:

Visitor Economy Key Performance Indicators

KPIs	2020	2019	2018	2017	2016	2015	2014	2013
GVA hospitality sector *	Benchmark + x%	Benchmark + x%	Benchmark + x%	Benchmark + x%	Establish Benchmark	TBC	3.8% £149m	3.77% £138m
Total visitors	800,000 (+2.22%)	782,700 (+2.22%)	765,700 (+2.22%)	749,100 (+2.22%)	732,900 (+2.22%)	717,000 (+2.22%)	701,430	681,900
Visitor spend-nominal (2.49% pa 2015-20)	£310m	£294m	£281m	£267m	£255m	£243m	£232m	£230m
Staying leisure visitors total	389,000	380,000	372,000	361,000	352,000	345,000	337,000	325,800
Island RevPAR**	Benchmark + x%	Benchmark + x%	Benchmark + x%	Benchmark + x%	Establish Benchmark	na	na	na
Average bed occupancy-August	89%	88%	88%	88%	86%	85%	85%	79%
Net promoter score of visitors	+2%	+2%	+2%	Base + 2%	Base to be set	na	na	na

* GVA: we do not know the true number. Tourism's impact is more than just economic. Research will help improve our understanding of tourism's impact.

** Island RevPAR: revenue per available room is a widely accepted measure of revenue per available room; a performance metric in the hotel industry that is calculated by dividing a hotel's total guestroom revenue by the room count and the number of days in the period being measured.

We are pleased to see that the report aspires to 'maximise commercial and public returns from our investments'. It is important that industry profitability is enhanced if we as hoteliers are to be able to justify future investment decisions; especially following what has been a long recession where investment into accommodation stock has been more challenging. Reporting on Island's RevPAR will be highly beneficial as a measure in addition to measuring visitor volumes.

Seamus Morvan,
Managing Director, Morvan Hotels

Recommendation 2 - Action	Lead Partners	Outcome or success measure
The Jersey Destination Plan will aim to deliver growth, improve competitiveness and productivity of the tourism sector	VJ, Government, JHA	• JDP published in 2015 • Objectives monitored yearly and delivered • Funding mechanism agreed to sustain momentum • Objective assessment of Jersey's competitive position vis a vis competitors (e.g. cost of landing & associated charges)
Raise productivity by developing a year-round visitor economy	VJ, JHA, Business owners	• Establish & report on Island's RevPAR • Improvements in room utilisation • Extending period of charter flights • New routes
Improve tourism's profile as a career of choice	Government, Schools, Skills Unit, Business leaders	• Tourism leaders engage in out-reach programme • Deliver annual "Tourism Heroes" media campaign

Raise productivity by developing a year-round visitor economy.

Priorities for growth

This strategy proposes that there are four drivers of tourism growth which will help realise the 2030 ambition. Our approach is long-term, whole of government-industry with all participating to create the conditions for growth as well as being responsible for delivering specific activities.

Market development

Agree & target best prospects to increase volume & value of visitors

Image development

Develop, promote & deliver "reasons to visit" Jersey & distribute content

Destination development

Create, package & deliver compelling experiences

Access development

Make it easier to get to and around Jersey

Market development

This market development priority is concerned with identifying markets and segments that will provide our best opportunities to grow visitor numbers and value.

In 2014 Jersey received 701,000 visits. The numbers have stagnated over the last decade and there is little evidence that existing segments will generate growth in the immediate future.

71% of SLV's are from the UK, by far our biggest source market. Therefore Visit Jersey commissioned Arkenford in June 2015 to undertake research among UK residents who take at least one 3+ night holiday a year, in order to better understand the trip taking behaviours of Jersey's most valuable source market. The study was designed to establish what attributes are considered to be important when choosing a holiday and to test the extent to which Jersey and other destinations are considered as offering these attributes. The research also captured information on whether or not the respondent had first-hand experience of Jersey and their current level of intention to visit the island in the next two years. The survey quizzed 2,775 individuals who live within sixty miles of airports or ports that offer regular access to Jersey. The sample is representative of 31.8 million UK residents.

27% had been to Jersey at some point in the past, less than half the proportion that said they had been to Cornwall. Looking at how recently Jersey and each of the other "competitor" destinations had been visited revealed that 41% of those who had visited Jersey had done so more than ten years ago. This compared unfavourably with each of the other destinations. For example, only 24% of those who had at some point visited West Wales did so more than a decade ago.

It is possible to establish "the size of the prize" by looking at intention to visit Jersey in the future.

Definitely not going to visit	4,105,820	12,362,992
Unlikely to visit	8,257,172	
Don't know enough to make a decision	3,683,615	11,333,852
Wouldn't rule it out but other places appeal more	7,650,237	
Strong consideration	6,665,657	8,025,657
Practically certain to visit	1,360,000	

This suggests that while almost 1.4 million UK residents are 'practically certain to visit', a further 6.7 million have 'strong consideration' towards a visit. However, at the other end of the spectrum 4.1 million are 'definitely not going to visit' and 8.3 million are 'unlikely to visit'. This leaves the interesting middle ground where we find 3.7 million people who claim they 'don't know enough to make a decision' and 7.7 million that 'wouldn't rule it out but other places appeal more'.

The reds are outside our consideration, the greens are those that need a nudge and the yellows are where marketing can build awareness and the appetite to visit Jersey.

The marketing challenge then is to:

- ensure that the 8 million "near market" of those who already claim strong intention to visit actually convert their intention into a definite booking
- educate and inspire the 11.3 million UK residents who don't' reject the idea of holidaying in Jersey, but need a compelling reason to do so
    - Although these people can be found across all age groups, they represent a larger proportion of those aged under 44 than they do of those aged 45 or older. In terms of where this group can be found one-in-four, that's 2.8 million potential visitors, reside within sixty miles of an airport in London. The next most sizeable contingent, 2.6 million, live within sixty miles of a non-London airport or port in the south of England

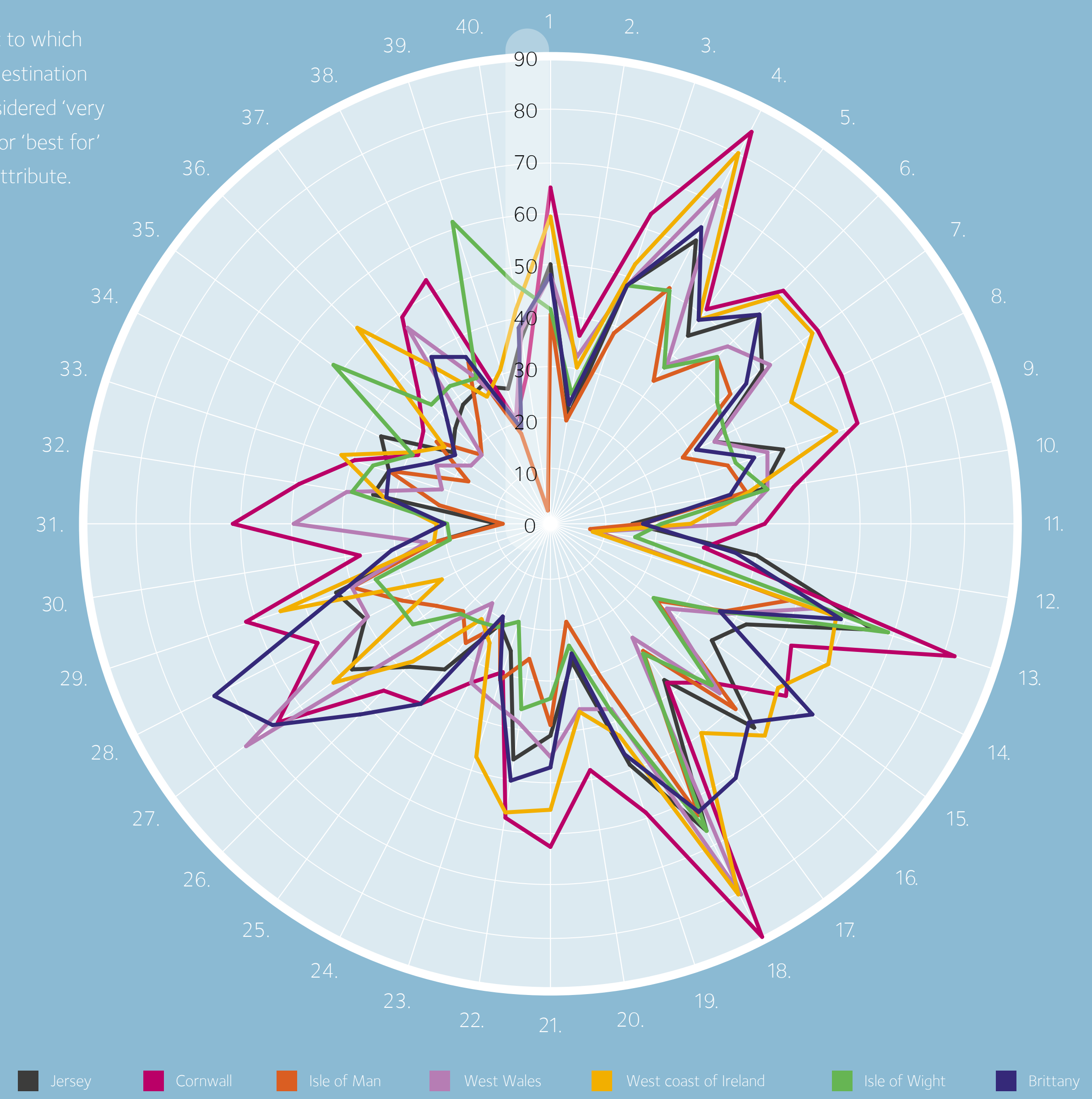
What characterises the 11.3 million who could be persuaded to holiday in Jersey if they can be reached with the right message?

- They are regular holiday-goers; two-thirds taking two or more holiday trips each year and one-third enjoying three plus holidays each year
- They are predominantly of socio-economic groups AB (46%) with only 14% falling into groups DE
- Half are working full time; the next largest group are the retired, representing one-in-five

The research covered some forty separate holidaying attributes. Those that appear to have the greatest resonance in destination choice include 'Having time to relax', 'The destination offers good value for money', 'Spending quality time with my family and friends', 'The attractiveness of the scenery and landscape' and 'Having lots of choice of things to see and do'. It is clear that holidays are not simply about "doing stuff" but about "experiences". However aspirational a destination might be it is clear that "value for money" is a vital ingredient. Another of the attributes that scored strongly was 'The cost of getting there', in eleventh spot.

The respondents were asked to assess whether Jersey and the other destinations were somewhere that offered the attributes so we can explore how Jersey stacks up, both in relation to the factors that matter the most and in relation to other destinations. The radar chart shows each of the forty attributes with the most important being at the top of the chart and the remainder shown in descending importance in a clockwise direction. The coloured lines reveal an index score for how often each destination was assessed to be either 'Very good' or 'Best for' offering the attribute.

Extent to which each destination is considered 'very good' or 'best for' each attribute.



1. Having the time to relax
2. The destination offers good value for money
3. Spending quality time with my family and friends
4. The attractiveness of the scenery and landscape
5. Having lots of choice of things to see and do
6. A chance to escape from my usual daily routine
7. Enjoying some peace and quiet
8. Having lots of fun and laughter
9. Being somewhere with a relaxed atmosphere in the evening
10. The ease of travelling around at the destination
11. The cost of getting there
12. Guaranteed fine weather
13. Being close to the sea and beaches
14. The friendliness of the welcome
15. Being able to try local food and drink
16. Being somewhere I have never been before
17. Experiencing a way of life different to my own
18. The opportunity to go for countryside or coastal walks
19. The variety of accommodation on offer
20. Going back to places I know I like
21. Lots of heritage sites to visit
22. Having a romantic break with my partner
23. Visiting a place that not many other tourists go to
24. The amount of time it will take to get there
25. The variety of shops and markets
26. The variety of cuisines on offer
27. Being able to buy local products / produce
28. Meeting local people
29. Learning about the stories associated with the destination
30. Plenty of museums and galleries to visit
31. Being able to get in the car and drive straight there
32. Being able to choose my destination at the last minute
33. Learning new skills and trying new things
34. The chance to be pampered
35. Attending festivals and special events
36. Plenty of venues with live music in the evening
37. The opportunity to participate in adventure activities
38. Activities that will keep the kids happy
39. Being somewhere with a vibrant nightlife
40. Being able to play amateur sport

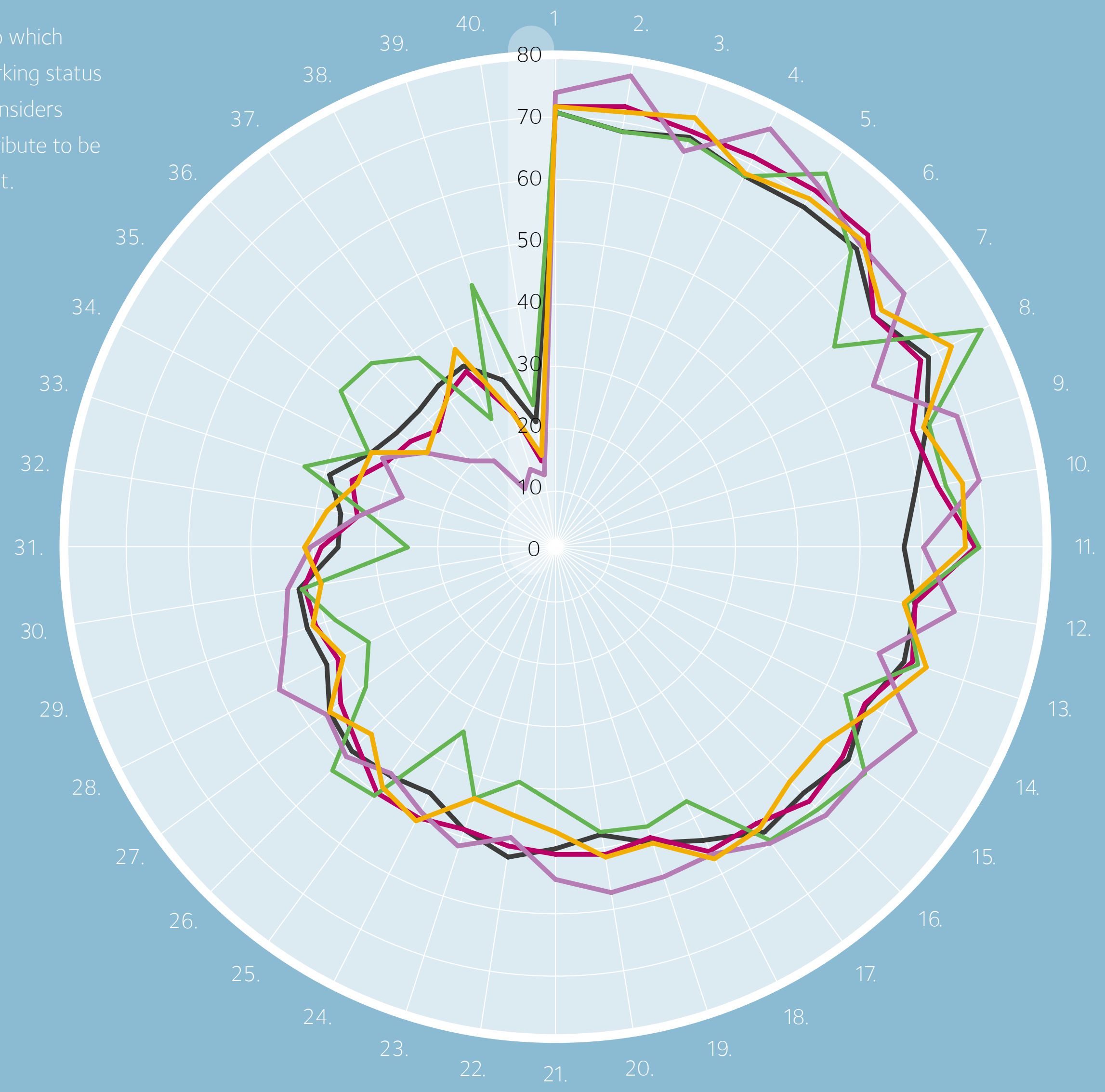
Cornwall and the West Coast of Ireland tend to achieve the highest scores for many of the attributes, especially those that matter the most- those between midday and 3pm on the chart. Jersey is mid table but on a couple of occasions is more highly rated than any of the competitor destinations; for 'guaranteed fine weather' and 'the chance to be pampered'.

The study captured information about respondents' age, gender, working status, types of holidays taken, sorts of activities enjoyed on holiday, frequency of accessing the internet through different types of devices, usage of different social media channels, extent to which they purchase newspapers, watch television, and listen to the radio.

This very rich data means Jersey can build best prospects groups with reference to which factors are best in influencing their holiday destination choice. One example; the following radar chart shows the relative importance of each attribute by working status. The retired 'over index' on 'the ease of travelling around the destination', 'the friendliness of the welcome', 'lots of heritage sites to visit' and 'meeting local people'. Students 'under index' on these attributes. The reverse is true for attributes such as 'having lots of fun and laughter', 'learning new skills and trying new things', 'attending festivals and special events' and 'being somewhere with a vibrant nightlife'.

This very rich data means Jersey can build best prospects groups with reference to which factors are best in influencing their holiday destination choice.

Extent to which each working status group considers each attribute to be important.



Working full time >30 hours pwk | Working part time <30 hours pwk | Student | Retired | Out of work / not working

1. Having the time to relax
2. The destination offers good value for money
3. Spending quality time with my family and friends
4. The attractiveness of the scenery and landscape
5. Having lots of choice of things to see and do
6. A chance to escape from my usual daily routine
7. Enjoying some peace and quiet
8. Having lots of fun and laughter
9. Being somewhere with a relaxed atmosphere in the evening
10. The ease of travelling around at the destination
11. The cost of getting there
12. Guaranteed fine weather
13. Being close to the sea and beaches
14. The friendliness of the welcome
15. Being able to try local food and drink
16. Being somewhere I have never been before
17. Experiencing a way of life different to my own
18. The opportunity to go for countryside or coastal walks
19. The variety of accommodation on offer
20. Going back to places I know I like
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26. The variety of cuisines on offer
27. Being able to buy local products / produce
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36. Plenty of venues with live music in the evening
37. The opportunity to participate in adventure activities
38. Activities that will keep the kids happy
39. Being somewhere with a vibrant nightlife
40. Being able to play amateur sport

This research points to potential sources of new demand that we can explore and exploit. But Jersey should not lose sight of our existing loyal groups of customers.

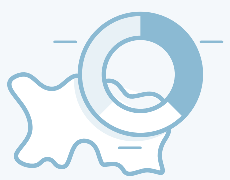
A three pronged approach to exploiting market potential is therefore recommended:

1 Nurture
Established segments from UK, France and Germany

2 Grow
New segments in the UK and current high-volume European markets, Scandinavia, and events tourism

3 Make
Longer haul markets such as USA, China, etc.

Recommendation 3 - Action	Lead Partners	Outcome or success measure
Jersey's tourism export markets to be categorised into 3 clusters: 1 Nurture; established UK and Europe group leisure segments 2 Grow; New UK & Europe, Scandinavia, events-led tourism 3 Make; USA, China, etc. Replicate consumer research in continental European markets, Scandinavia and German speaking countries	VJ	• Customer target groups agreed • Adoption of the VJ consumer research findings by trade partners • Identify common objectives and actions across government and industry • Support from industry for Jersey marketing initiatives



Jersey's tourism export markets to be categorised into 3 clusters:
1 Nurture; 2 Grow; 3 Make.

Nurture

These are our existing loyal segments of typically more mature travellers. But they have not delivered growth over the past decade. Visitors typically rely heavily on travel intermediaries for holiday itineraries and book with travel agents. These visitors are vital to Jersey in generating volume.

Recommendation 4 - Action	Lead Partners	Outcome or success measure
Nurture Continue supporting leisure group business from the UK and Europe and search for additional ways to boost incremental growth	VJ, JHA, Ports, Industry	• Maintain summer charter volumes • No net reduction in accommodation stock • Halt long-term decline in leisure staying visitor numbers

Continue supporting leisure group business from the UK and Europe and search for additional ways to boost incremental growth.

Grow

Research will help identify growth sources of demand in the UK and Europe.

Examples

1 Mid-week and short-break

There is real evidence that higher value segments in the UK (June 2015 Arkenford study) and Northern Europe (anecdotal evidence) exist. The mid-week and short-break market (1 to 3 nights) from the UK and continental Europe is massive. In the UK alone, over 50 million short breaks are taken annually and around 7 million to Europe (Visit England UKTS). Much of this travel is out of the peak summer months.

2 Occupation Tourism

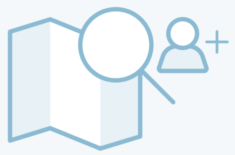
The Channel Islands were administered as part of Greater Normandy during the German occupation and our stock of occupation-related experiences and structures is first-class. Normandy Regional Tourist Board promotes "D-Day Normandy- Land of Liberty" (www.normandy-dd.com). Every year around 50,000 North Americans visit the beaches of North France. The opportunity to work with US tour operators and French suppliers could bring a new segment of visitors to Jersey.

3 Weddings

Around 600 weddings take place in Jersey each year; around half attract off-island participation. Recent changes to permit weddings on our beaches means the wedding market could be exploited for tourism growth.

> I believe there is great interest in Europe relating to the Second World War...We need to make the best use of what we have available to us... Perhaps (an) initiative could be completed for the 75th anniversary of the D-Day landings in 2019 or the 75th anniversary of VE day in 2020.
>
> Gerald Voisin,
> Chairman Voisins Department Store Limited

Recommendation 5 - Action	Lead Partners	Outcome or success measure
Grow- leisure • Research to identify new sources of visitors from the UK & Europe	VJ	• Complete research • Describe and agree best prospects for future growth segments • Communicate with stakeholders • Product created/modified to respond to potential demand (improved product-market fit)



Research to identify new sources of visitors from the UK & Europe.

Make

A third cluster of markets can be classified as Make. These are typically longer haul destinations. Jersey can be positioned as a bolt-on to a UK or European visit. No air passenger duty (APD) is payable on a flight departing Jersey which transits the UK within 24 hours. From April 2016, a passenger exiting Jersey to return to Asia or America, as opposed to departing from the UK, would not pay £71 (economy) or £142 (business/first) departure tax; enough to cover a flight to Jersey and a chunk of the accommodation cost. Every US citizen knows New Jersey and knows that many place names originate from Europe; this presents a marketing opportunity.

A coat-tail approach summarises how Jersey could operate in these markets. Be opportunistic, carry a very light footprint, sweat existing assets and resources, and look to leverage public and commercial partners already in these markets.

In these longer haul countries a Jersey tourism experience might suit some niche opportunities, such as walking trips for senior Japanese or gourmet treats for Chinese visitors and the route to these potential customers is likely to be through travel intermediaries in the source markets.

Recommendation 6 - Action	Lead Partners	Outcome or success measure
Make • Identify third parties active in potential make markets • Research and classify niche opportunities • Agree a programme of engagement	VJ, LJ, JF	• Overseas travel trade partners (e.g. tour operators) producing Jersey itineraries • Increased visitor number and spend from Make markets

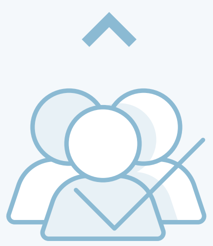
Image development

Perceptions of a place take time to shift and need long term commitment and funding to achieve change. It's a competitive marketplace. Very conservatively at least £ ½ billion is spent by destinations promoting themselves around the world. Jersey struggles for a share of voice in this ever increasingly competitive marketplace.

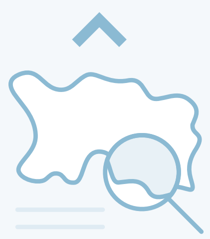
Jersey's image overseas is shaped by the actions of many- it's not just Visit Jersey. For instance, Bergerac retains an influence over the public's understanding of Jersey. Cows, potatoes and seafood and beaches also influence perceptions. Jersey has a number of enviable traits but this does not necessarily translate into a desire to visit. A simple consistently applied proposition is missing.

Jersey must be single-minded when talking to potential visitors to help cut through all the communication clutter out there. Jersey is admired for its role in finance and agricultural produce, but not necessarily as a vibrant and compelling holiday destination.

Recommendation 7 - Action	Lead Partners	Outcome or success measure
• Research and develop a Jersey proposition	VJ, JHA, Chartered Institute of Marketing	• Commission agency and deliver brand proposition by Spring 2016 • More effective marketing • Increased conversion, visits and spend • Positive stakeholder engagement



Identify third parties active in potential Make markets.



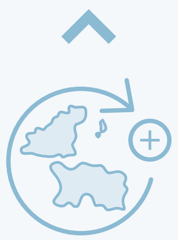
Research and develop a Jersey proposition.

A number of potential visitors in some source markets perceive Jersey as part of the Channel Islands; Germans for instance. There have been some instances of tactical cooperation with the other islands, but a more strategic alignment of tourism markets and activities has not been attempted.

I believe that VJ should consult and agree a marketing programme with Visit Guernsey for all markets. This could greatly assist in finding a compelling reason to visit the Channel Islands.

Bill Dolan,
Dolan Hotels

Recommendation 8 – Action	Lead Partners	Outcome or success measure
• Consult with and agree a marketing programme with Visit Guernsey that builds on the strengths of our joint identity where it makes sense	VJ, VG	• A marketing accord that is accepted by the trade in Jersey, Guernsey and the other islands • Annual programme agreed and delivered • Establish an Islands Research Group



Consult with and agree a marketing programme with Visit Guernsey that builds on the strengths of our joint identity where it makes sense.

Any customer typically goes through a purchasing cycle when buying a tourism product or service. There are five stages, each comprising specific behaviours and influenced by differing forms of communication. Digital channels are ever more relevant in communicating with potential customers.

Stage	Dreaming	Researching	Booking	Experiencing	Sharing
Goal	Capture imagination Inspiration Create desire	Make it tangible and achievable Communicate value	Make it easy	Increase spend in market Encourage return visits Prompt advocacy	Inspire others' journeys The next journey

Jersey's aspiration should be to provide relevant, inspirational and targeted content across the whole customer journey that is unique, valuable and authentic. This information role is not the sole preserve of Visit Jersey. Consumers delivered over 900 content items (text, photos and videos) to The NatWest Island Games Visit Jersey campaign "#experience jersey". Visit Jersey's website saw a 40% increase in visitors during the campaign period compared to the same period last year, mostly as a result of inspiring content that customers had posted.

Recommendation 9 – Action	Lead Partners	Outcome or success measure
• VJ to be principally responsible for identifying and warming up leads- dreaming, researching and booking stages • Industry partners to be responsible for converting, taking booking and delivering compelling experiences- booking, experience and sharing stages	VJ, Industry	• Increased exposure of brand and products through a range of channels • Increased visitor numbers and spend • Visitor satisfaction survey

VJ to be principally responsible for identifying and warming up leads- dreaming, researching and booking stages.

TV viewing habits continue to fragment with 1 in 3 potential visitors watching television outside of live programming. The average UK individual spent 23 hours and 10 minutes watching some form of TV in the first week of June 2015. This is down from 26 hours and 3 minutes during the equivalent week of 2010. 40% do not view adverts even when they do watch live TV. Digital channels are now the top source for leisure travel planning and are effective across the entire visitor buying journey. Digital advertising provides a similar reach to TV advertising but is more cost efficient and provides greater flexibility in targeting and messaging. Crucially, it can be quickly evaluated to help improve marketing impact. (Source: Google Travel Study, June 2014, Ipsos MediaCT)

In 2013 VisitBritain looked at what sources of information influenced a person's choice of holiday destination. The influence most often cited was 'friends / relatives / colleagues' followed by travel guide website (e.g. Lonely Planet) and then review websites (e.g. Trip Advisor). The least mentioned sources of influence, which was the case in just about every source market, were poster adverts, travel programme on radio, and information in radio adverts.

Overall I think the report sets out achievable objectives and presents a huge plethora of exciting opportunities. The challenges are well within the reach of the island to reposition and market Jersey, seizing upon the dynamic new media landscapes, which will unlock a much wider demographic.

Tess Hartmann,
Managing director Hartmann House

Recommendation 10 – Action	Lead Partners	Outcome or success measure
• E-marketing and social media channels are key routes to market	VJ, Industry	• Engagement and dwell time of customers achieve industry benchmark scores • Social sharing and advocacy • Partner marketing campaign bookings

Jersey will never be in a position to outspend competitors, we need to be smarter. Jersey needs to go where the consumer is, instead of trying to convince consumers to come to our channels - "fish where the fish are".

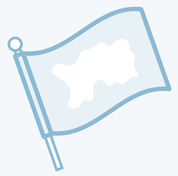
E-marketing and social media channels are key routes to market.

Recommendation 11 – Action	Lead Partners	Outcome or success measure
• Serve up relevant, inspirational and informative content in the places in which Jersey's best tourism prospects consume their media- users' own social platforms and media channels across their purchase cycle	VJ, JHA, Attractions Group	• Increased exposure of Jersey proposition and products on a range of appropriate digital channels

Potential visitors access information at all stages of their travel decision-making. Historically Jersey has devoted sizeable financial, staffing and managerial resources to servicing visitors on-island- through the Visitor Centre at Liberation Place. An impressive but expensive to produce series of Jersey guides has also been printed to fulfil brochure requests and support on-island events.

Serve up relevant, inspirational and informative content in the places in which Jersey's best tourism prospects consume their media- users' own social platforms and media channels across their purchase cycle.

Recommendation 12 – Action	Lead Partners	Outcome or success measure
• Promote tourism within Jersey in an innovative, economic and efficient way	VJ, commercial partners	• Production and distribution of information that meets the needs of visitors on-island (likely to be predominantly digital in nature) • Provide an on-island information service for visitors utilising public and private means



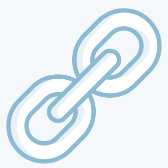
Promote tourism within Jersey in an innovative, economic and efficient way.

Access development

Route connectivity can act as a brake or accelerator on the number of people visiting Jersey. In 2014, 70% of visitors travelled to Jersey by air and 30% travelled by sea. During the summer Jersey is served from over 40 departure points by both scheduled and charter flights.

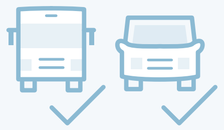
Joint marketing between the Ports of Jersey, sea and air carriers, tour operators and Visit Jersey have buttressed routes to Jersey. But without more routes and/or added capacity from prosperous parts of the UK and Europe the 2030 ambition could be at risk. This strand of work is long term in nature and will require substantial marketing funds to cultivate new routes.

Recommendation 13 – Action	Lead Partners	Outcome or success measure
• Improve regional connectivity between Jersey, the UK and mainland Europe	Ports, Carriers, Government, VJ	• Routes at threat monitored and remedial actions agreed if the economic case for visitor numbers and spend is confirmed as a net benefit to Jersey • Ten year route development plan with a focus on out of main summer travel • Best prospects routes identified • Partner marketing campaign delivered • Fare monitor established and reporting regularly



Improve regional connectivity between Jersey, the UK and mainland Europe.

Recommendation 14 – Action	Lead Partners	Outcome or success measure
• Develop the on-island transportation offering; public and private	Government, Transportation Providers	• Deliver Welcome Host style programme for front-line transport staff • Better packaging of transport with other tourism products



Develop the on-island transportation offering; public and private.

Destination development

Taking a holistic view of the visitor experience from port of entry through to exit, the visitor's experience is made up of many separate interactions with Jersey and suppliers- transport, shopping, eating, sight-seeing, and accommodation. Jersey's food offering is top class and is consistently rated amongst the best experience Jersey offers. The range of land and sea-based activities also presents well against competition.

People need places to stay and as Jersey seeks to increase visitor numbers and attract new segments of visitors, the island may need to grow its stock of accommodation. Planning practices need to be supportive of this growth. For example, festival goers expect to camp near festivals and not everyone requires breakfast with their lodging.

Self-catering visitors are driving the accommodation "sharing economy" where services such as Airbnb can be found. The UK's 2015 International Passenger Survey indicates the proportion of visits with "rented house" as the type of accommodation used by overseas visitors to the UK was 4% in 2014. This is a small share of the overall total but has increased by 35% since 2012. Clearly not all those using 'rented house' as a form of accommodation will have been using AirBnB but no doubt AirBnB accounts for a large amount of the growth. As the sharing economy grows, government must ensure there is a level regulatory playing field for all.

Jersey's licensing and shopping hours are limited compared to some other competitor destinations. The Chancellor Mr Osborne proposed longer trading hours on Sunday in his 2015 July budget for England and Wales. The regeneration of St Helier is one of the Council of Ministers' priorities and we need to know if Jersey's pattern of trading is impeding or not the development of short haul, short break holidays. Research is called for to benchmark Jersey's delivery of these services, especially to understand how well Jersey is rated compared to competitor destinations.

> Red tape and health and safety naysayers can suck all the energy and enjoyment out of trying something genuinely exciting. They should be there to make an activity safe, not stop it from happening!
>
> Thomas Dingle,
> Director, Jersey Arts Trust

Visitors demand access to Wi-Fi at little or no cost. Destinations are increasingly creating the conditions that allow visitors and the general public to instantly share their "in the moment" experience. Within the EU roaming charges will be abolished in 2017. Jersey is and will be at a competitive disadvantage. The question is- who is going to pay for free Wi-Fi island-wide?

Some other aspects are beyond our control such as foreign exchange rates and competitor marketing spends. These can have a considerable impact. A strong pound makes Jersey less attractive for UK-based travellers as well as for Euro-based visitors.

There is a need for Jersey's travel trade and suppliers and Visit Jersey to work together to improve Jersey's range of products to drive business profits and growth in tourism export earnings. We collectively need to ensure products are easily packaged and commissionable products available for overseas markets.

> From a cultural perspective, the value of involving the range of arts and heritage organisations – commercial and voluntary – in telling the Jersey story is warmly endorsed...I think there is great opportunity to present the cultural offering more vividly for the benefit of visitors.
>
> Rod McLoughlin,
> Cultural Development Officer, States of Jersey

Prospects to cultivate niche opportunities and develop Jersey products and visitor experience within the Grow and Make clusters are favourable.

Examples

1. A large number of activities- both gentle and strenuous- are offered in Jersey that could be better packaged to appeal to the outdoor activity sector such as "Tidal Walking & Beach BBQ".
2. Activity-based leisure could be infused with educational content to position it to appeal to the schools outing market.
3. Jersey is arguably unique in the density and quality of its natural and cultural heritage. We also have first-rate bodies overseeing these assets; Société Jersiaise, Channel Islands Occupation Society, the National Trust for Jersey and Jersey Heritage. The Channel Islands World Heritage Working Group is leading efforts to achieve UNESCO World Heritage Site status. Visitors who enjoy cultural pursuits on holiday typically spend more, value the destination more and become eloquent ambassadors for the destination.
4. Jersey's Second World War inventory of content is impressive but the various elements are not positioned as a distinct and easy to buy offering.

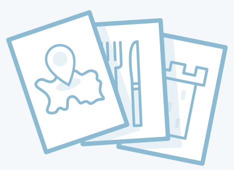
> The market for cultural tourists, which falls within more than one of the identified segments, should receive detailed consideration as the highest priority.
>
> John Mesch

Recommendation 15 - Action	Lead Partners	Outcome or success measure
• Develop tourism in Jersey to support a year-round visitor economy	VJ, JHA, EDD, CoC	• Year-round growth in visitor numbers and spend • Jersey offers Wi-Fi across the island (or at least an effective network of Wi-Fi hotspots open to visitors)
• Increase the value of the visitor economy by identifying and nurturing new higher value source markets	VJ, JHA, Industry	• Agree series of niche opportunities • Average spend of visitor increases ahead of inflation

Increase the value of the visitor economy by identifying and nurturing new higher value source markets.

Recommendation 16 – Action	Lead Partners	Outcome or success measure
• Encourage the development and improvement of Jersey's stock of accommodation to meet visitors' needs	VJ, EDD, JHA, Government planning	• Equal treatment of all accommodation suppliers • Planning regime that is responsive to visitor lodging requirements

Recommendation 17 – Action	Lead Partners	Outcome or success measure
• From 2016 to 2020 deliver a thematic destination programme (e.g. year 1 coast, year 2 food, year 3 heritage, (indicative only)) associated with the Jersey proposition and highlighting Jersey's tourism products	VJ, JHA, Attractions Group, Industry	• Series of annual product themes • Product development and packaging aligned to themes • Year-round growth in visitor numbers and spend



From 2016 to 2020 deliver a thematic destination programme (e.g. year 1 coast, year 2 food, year 3 heritage, (indicative only)) associated with the Jersey proposition and highlighting Jersey's tourism products.

Events tourism (includes business events and festivals)

The main purpose of events tourism is to increase tourism export earnings targeting increased visitor numbers out of the main season. We also need to appreciate that successful events often take time to build an off-island following and require a local audience to be sustainable. Annually in the UK, there are over 900 cultural events and festivals. What is uniquely compelling about an event or festival in Jersey that propels people to get on a plane or ship and attend an event in Jersey? Is it perhaps the blending of arts with heritage, food with countryside and coastlines, etc.?

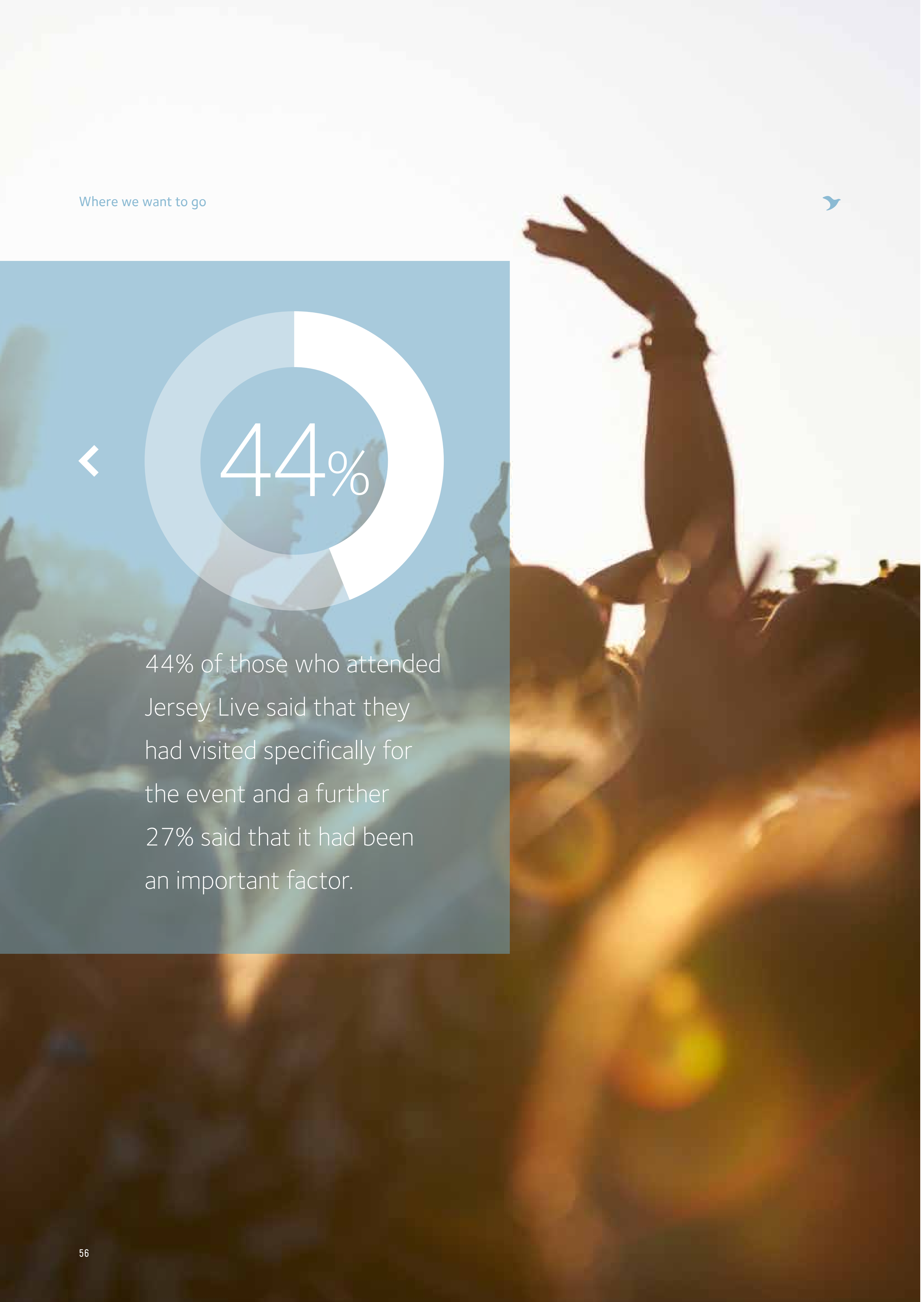
Research completed by the Australia government (Events: drivers of regional tourism, August 2014) suggests events can be a driver of tourism. Events that successfully attracted international visitors highlighted local attractions and unique tourism offerings of the location, otherwise events mainly appealed to local communities. Music, food and wine and sporting events had the strongest appeal. Agricultural events had smaller levels of appeal. The "Wish You Were Here" 2015 report published in June by UK Music and undertaken by Oxford Economics, reports that foreign visitors spend £922 at festivals whilst domestic visitors shell out £438. The average spend of a visitor to Jersey in 2014 was £334.

The Australian research provides some evidence that events can drive visitation when certain conditions prevail. In addition to economic benefit, events can also add reputational and social capital benefits. Jersey can grow tourism export earnings and visitor numbers if we can design, promote and deliver events. Jersey certainly has the passion to run events but this passion needs to be allied with professionalism and realism. Events management and promotion is a competitive industry and there is little room for the plucky amateur if we are to grow this sector of the visitor economy.

Jersey has a healthy sporting scene with many local clubs and associations. Jersey hosted the NatWest Island Games to universal acclaim. Success on the track was matched by success in the wider visitor economy; rooms full, restaurants and bars heaving and high footfall at visitor attractions. This suggests two opportunities to grow visitor numbers; participation in events and visiting to watch events. Jersey Rugby Club has good success in attracting high levels of away supporters who combine a trip to see their club with a short break in Jersey.

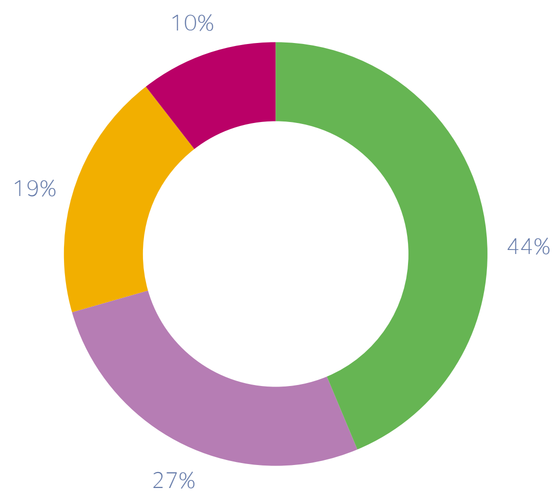
In order to develop a richer understanding of how events can act as a lever to attract visitors to Jersey a survey was undertaken at the port and airport between 6th and 16th September 2015. Departing non-resident leisure visitors whose trip had involved being in Jersey during either Jersey Live or the International Air Display were invited to participate. Of those who were in Jersey during Jersey Live, 18% attended the event, while of those in Jersey during the International Air Display 59% attended an event associated with the Display.

44% of those who attended Jersey Live said that they had visited specifically for the event and a further 27% said that it had been an important factor. For the International Air Display only 6% said they had visited specifically for the event and a further 14% saying that it had been an important factor.

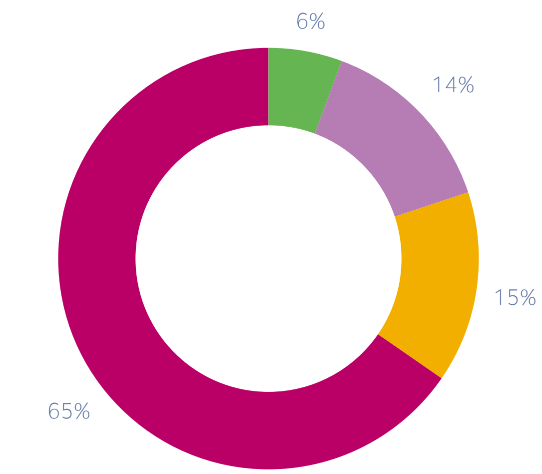


44% of those who attended Jersey Live said that they had visited specifically for the event and a further 27% said that it had been an important factor.

Extent to which visit was influenced by Jersey Live among those who attended the event

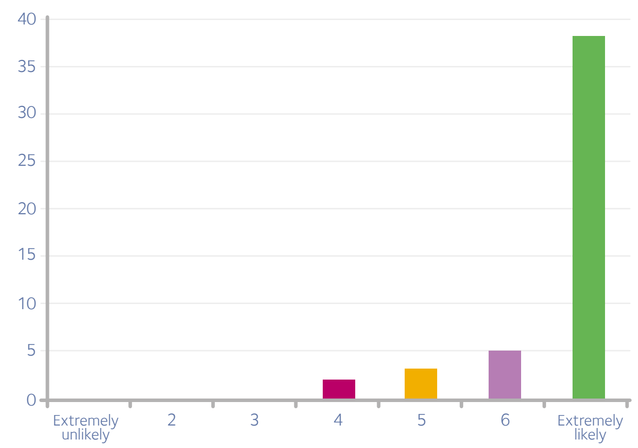


Extent to which visit was influenced by International Air Display among those who attended the event

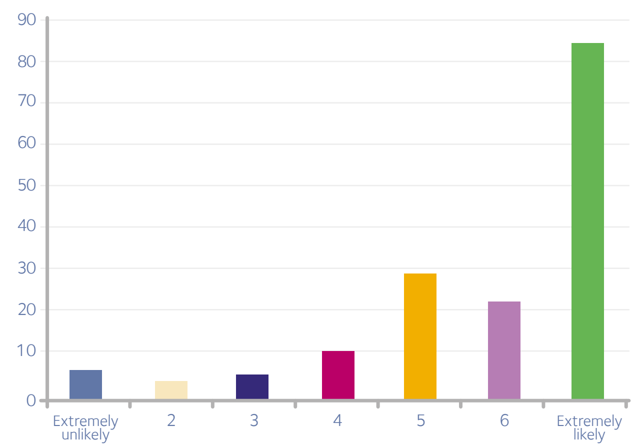


Attenders were asked whether they would recommend visiting Jersey for Jersey Live and/or the International Air Display and as can be seen the vast majority were positive.

Likelihood of recommending attendance at a future Jersey Live

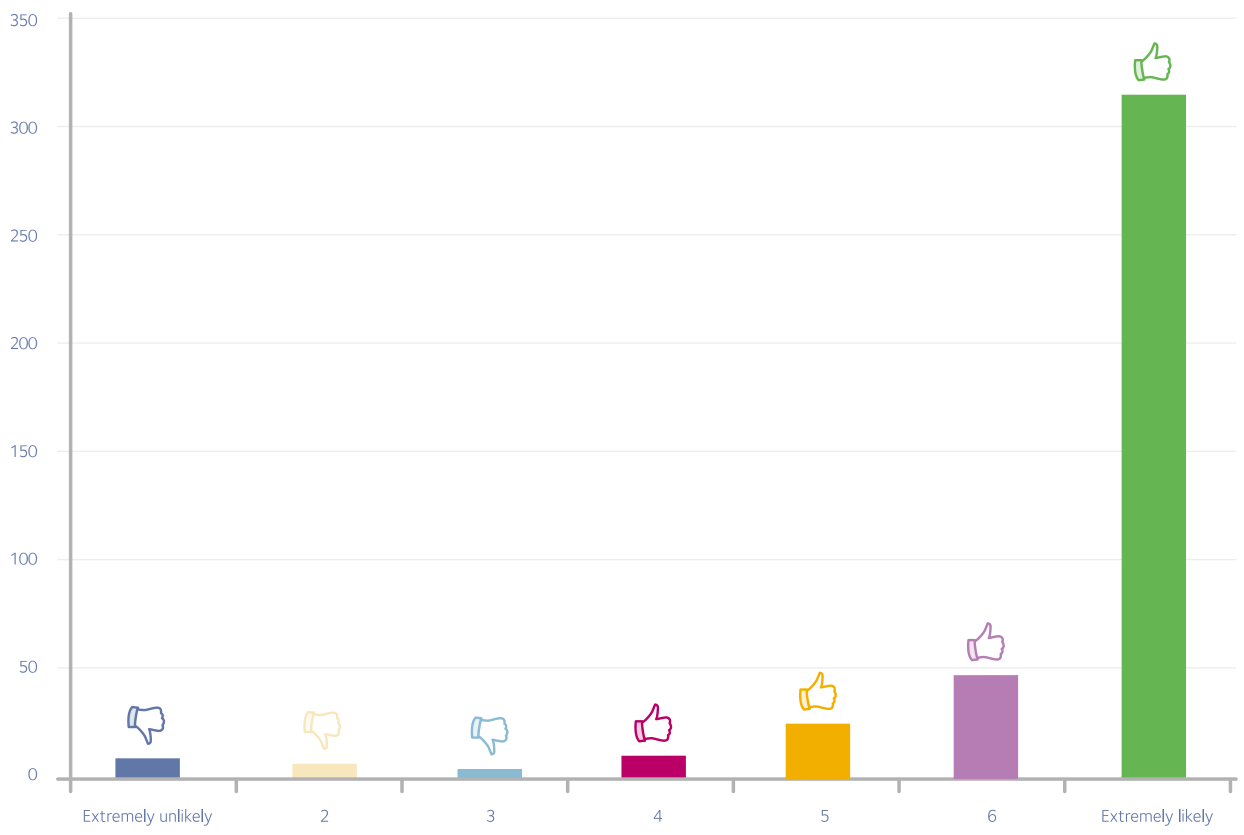


Likelihood of recommending attendance at a future International Air Display in Jersey



Finally ALL those who were in Jersey during one or other of the events were asked how likely they would be to recommend Jersey as a holiday or short-break destination. A very big majority are 'Extremely likely' to do so.

Likelihood of recommending attendance as a holiday or short break destination



It is our assertion that Jersey is punching below its weight in events-led tourism.

Barriers to growth however need to be acknowledged and responses put in place. Our image needs to be more compelling, we have to overcome value for money concerns and come up with a workable events development model. Jersey's events travel trade infrastructure is poorly developed; there is a limited number of bonded operators and expert DMCs (Destination Management Companies) on-island. Regulations and planning procedures can be challenging. Significant product gaps such as wet weather contingencies inhibit growth.

Any "Events- Jersey" body, that may be formed, must operate within the parameters set out by the Jersey Destination Plan and be guided by Visit Jersey. This will ensure a seamless approach to the development of and marketing of all tourism to Jersey.

Recommendation 18 – Action	Lead Partners	Outcome or success measure

• Support events-led tourism
• Develop a best practices guide
	EDD, VJ	• Deliver market insights and advice to support events' design and marketing
		• Suite of best practice tools and performance metrics consisting of:
		  • design
		  • promotion
		  • delivery of events on Jersey at strategic, tactical and operational levels

Recommendation 19 – Action	Lead Partners	Outcome or success measure
• Identify and cultivate a small number of high profile events which offer long term growth prospects, serve to put Jersey on the map, and have a positive investment potential	EDD, VJ, CoC, IoD, JB	• Calendar of events (this could be a list of single events, a grouping of events/festivals under a common "brand" such as Jersey Festival of Food, Jersey Speed Feast linking the Air Show, Boat Show, Motoring Shows, or a series of Week Festival/events throughout the year) • Net financial benefit to the Jersey economy

Support events-led tourism.

Partnerships and connectivity

The visitor economy is part of the wider Jersey economy and is interconnected. Good places to eat, great places to stay, numerous options for getting to and from Jersey benefit other sectors and residents.

The digitisation of many aspects of tourism is also being felt by other economic sectors. Rapid changes in the technological landscape are therefore impacting on all.

The Jersey tourism industry needs to be connected to past, current and future visitors as efficiently as possible. And tourism businesses need to ever more use digital tools to run their operations and deliver excellent services. This challenge is shared with other non-tourism businesses.

Recommendation 20 - Action	Lead Partners	Outcome or success measure
• Encourage tourism businesses to be more digitally astute	VJ, DJ, CoC, JB	• Businesses actively seek out digital solutions to answer their needs • Businesses embrace digital channels to market • Digital solution companies to provide solutions that give Jersey the edge and improve the visitor experience

Encourage tourism businesses to be more digitally astute.

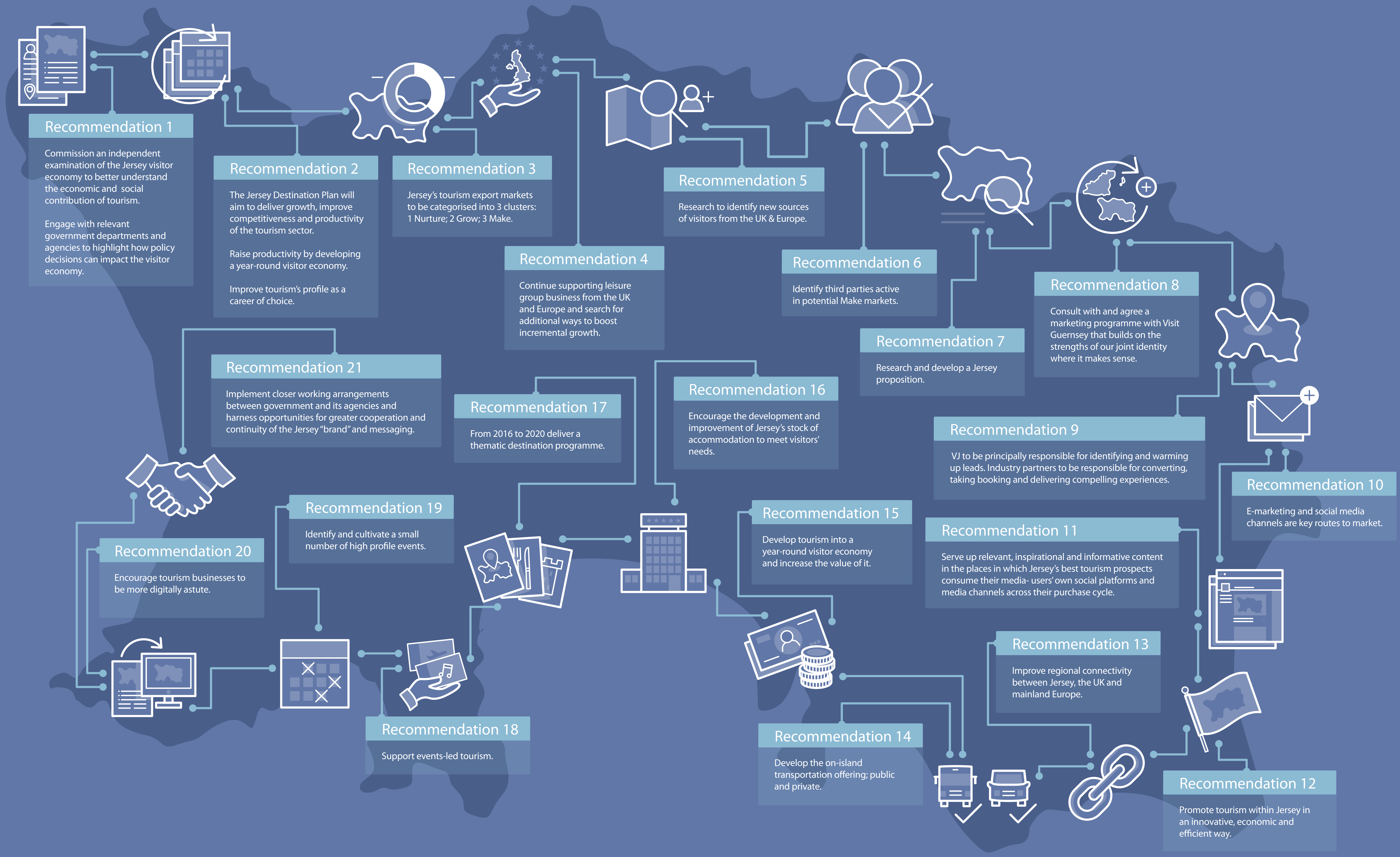
The nature of tourism means that it is directly and indirectly impacted by a range of public and private bodies and issues. Our proposal is to begin a conversation on how, in partnership, entities across the public and private sectors can align to deliver tourism's full economic growth potential.

Budgets in both the public and private sector are likely to remain tight. Partnership working represents the best opportunity to enable Jersey to improve its competitive position. There is scope to align funding and activities better in order to leverage greater resources in the promotion of Jersey. This is wider than just tourism promotion. For instance, the States of Jersey and its promotional bodies such as Locate Jersey, Jersey Finance, Digital Jersey could better coordinate resources and programmes to work together overseas. Building a consistently delivered Jersey story more broadly with other government bodies will add value to all (as the UK government's GREAT campaign testifies). Commercial partners also perform an important role in carrying the Jersey story to market. Visit Jersey ought to facilitate connections and encourage co-operative working.

Recommendation 21 - Action	Lead Partners	Outcome or success measure
• Implement closer working arrangements between government and its agencies and harness opportunities for greater cooperation and continuity of the Jersey "brand" and messaging	EDD, IoD, VJ, LJ, DJ, JF, JB, CoC	• Creation of a Jersey "credentials pitch" that promotes Jersey as a place to live, invest in, do business with, visit and study • Cross-selling all of Jersey at international exhibitions, conferences and meetings • Involvement of the commercial and voluntary sectors in telling the Jersey story

Glossary

CoC	Chamber of Commerce
DJ	Digital Jersey
EDD	Economic Development Department
GJ	Genuine Jersey
IoD	Institute of Directors
JB	Jersey Business
JDP	Jersey Destination Plan
JF	Jersey Finance
JHA	Jersey Hospitality Association
LJ	Locate Jersey
Ports	Ports of Jersey
SLV	Staying Leisure Visits
VG	Visit Guernsey
VJ	Visit Jersey


Recommendation 1
Commission an independent examination of the Jersey visitor economy to better understand the economic and social contribution of tourism.
Engage with relevant government departments and agencies to highlight how policy decisions can impact the visitor economy.
Recommendation 2
The Jersey Destination Plan will aim to deliver growth, improve competitiveness and productivity of the tourism sector.
Raise productivity by developing a year-round visitor economy.
Improve tourism's profile as a career of choice.
Recommendation 3
Jersey's tourism export markets to be categorised into 3 clusters: 1 Nurture; 2 Grow; 3 Make.
Recommendation 4
Continue supporting leisure group business from the UK and Europe and search for additional ways to boost incremental growth.
Recommendation 5
Research to identify new sources of visitors from the UK & Europe.
Recommendation 6
Identify third parties active in potential Make markets.
Recommendation 7
Research and develop a Jersey proposition.
Recommendation 8
Consult with and agree a marketing programme with Visit Guernsey that builds on the strengths of our joint identity where it makes sense.
Recommendation 9
VJ to be principally responsible for identifying and warming up leads. Industry partners to be responsible for converting, taking booking and delivering compelling experiences.
Recommendation 10
E-marketing and social media channels are key routes to market.
Recommendation 11
Serve up relevant, inspirational and informative content in the places in which Jersey's best tourism prospects consume their media- users' own social platforms and media channels across their purchase cycle.
Recommendation 12
Promote tourism within Jersey in an innovative, economic and efficient way.
Recommendation 13
Improve regional connectivity between Jersey, the UK and mainland Europe.
Recommendation 14
Develop the on-island transportation offering; public and private.
Recommendation 15
Develop tourism into a year-round visitor economy and increase the value of it.
Recommendation 16
Encourage the development and improvement of Jersey's stock of accommodation to meet visitors' needs.
Recommendation 17
From 2016 to 2020 deliver a thematic destination programme.
Recommendation 18
Support events-led tourism.
Recommendation 19
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Produced By:
Visit Jersey
Liberation Place
St Helier
Jersey
JE1 1BB
JDPProposal@VisitJersey.Je