Locumconsulting
creating successful destinations

Jersey Destination Audit - Towards a Jersey Tourism Development Strategy

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Locum Consulting
Rockwood House
9-17 Perrymount Road
Haywards Heath Rh16 3TW
United Kingdom

T: +44 (0) 1444 459449
F: +44 (0) 1444 458911
Info@locumconsulting.com
www.locumconsulting.com

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1. Approach

1.1 Objective

This report is intended to form the baseline for a new tourism development strategy for Jersey.

It, in particular, is intended to focus on the opportunities for product development.

It is divided into two sections.

The first is a detailed audit of the tourism industry in Jersey.

The second it a list of suggested principles that could underpin a new strategy, and an assessment of the main ideas for development of the tourism offer.

1.2 The Destination Audit

Locum works on the principle that a successful destination balances four key elements:

- **Attractors** – the things that motivate people to visit, individually or as part of the whole experience. They include attractions, events, shopping offer etc. Increasingly they include accommodation and restaurants, which are often the prime reason that people visit places.
- **Infrastructure** – the facilities that enable visitors to get to the destination and stay there. Principally, transport, accommodation and food and beverage. Both could actually be treated as attractors as accommodation and accessibility are primary factors in choice of destination.
- **Services** – information that allows visitors to make the choice as to where they go, to book, and to enjoy the experience when they are at the destination. Includes visitor information, signage, interpretation and facilities like toilets.
- **Management** – a system responsible for developing and managing the destination brand, the brand encapsulating all elements of the product and the way in which it presents itself to the world. The management of the destination brand can be thought of in terms of four key roles: leading and co-ordinating the development of the destination, attracting visitors, serving visitors, and serving the industry.

This framework has been used to assess the strengths, weaknesses, opportunities and threats for the Jersey tourism industry.

Figure 1: Destination Components

1.3 Ideas for Principles and Product Development

The second section is developed from the Destination Audit.

It provides a range of ideas for the principles that might underpin a new strategy.

It also provides a range of product development ideas.

Many of the ideas are aspirational, although we believe also achievable. The main aim at this stage is to provide some inspiration to stakeholders.

1.4 Methodology

In producing this report, Locum had meetings with a large number of stakeholders. They are listed in the Appendices. We thank all those who gave their time and apologise to those that we were unable to see.

We also perused the documents listed in the bibliography and devoted considerable time to travelling around the island and experiencing its attractions.

2. Executive Summary

2.1 The Big Picture

Like other traditional seaside resorts in the UK, Jersey built a substantial tourism economy based on the two-week family bucket and spade holiday.

Like other resorts, that economy went into rapid decline because:

- People began to take holidays in more exotic climes.
- Families started to want self-catering as opposed to serviced accommodation.

The decline probably started a bit later in Jersey than on the UK mainland because Jersey was perceived as more of an "overseas" destination.

This decline put pressure on lower quality hotels and bed and breakfasts. Fortunately, unlike in most mainland resorts, the growth of the Financial Services industry had created demand for residential accommodation that soaked up obsolete tourist accommodation.

Some potentially viable tourist accommodation was probably lost in the process, but much of the lost stock probably did not have realistic potential for viable long-term tourism use.

In mainland resorts, by contrast, redundant tourism accommodation was typically converted into low quality bed-sits. As a result, the inner wards of most UK resorts are at the top of national deprivation indices.

The traditional 1 week and, to a lesser extent, 2 week holiday still represents a large proportion of the visits to Jersey. It is largely an older audience. It has a high degree of loyalty to Jersey, being habitual in its behaviour. It primarily purchases its holidays as all-inclusive packages and is price sensitive.

This market is likely to decline further.

Even more markedly, visits from most continental markets have collapsed over the past 10 years or so, having in most cases shown growth in the early 1990s. The largest individual cause of this is likely to have been the appreciation in value of sterling since 1997 (once Visiting Friends and Relatives are taken out, leisure visits from overseas in the UK as a whole have been sickly since then). It is likely that visits from continental markets have been also adversely affected by the same trends that have undermined the UK market, which have resulted in tour operators ceasing to offer packages to Jersey and Jersey Tourism withdrawing marketing activity from them.

The precipitous decline in the long stay holiday has caused considerable pain to operators affected and will probably cause more before it is over. Close to 40% of the island's hotel rooms are in the independent 1 and 2 star sectors, and another 40% are in the independent 3 star market, about 3,700 rooms in total. The better operations in these sectors will probably continue to do well, but it is hard to see where the demand will come from for a substantial proportion.

The decline in the volume of business is reflected, for example, in the falling visitor numbers at attractions, including important cultural and heritage sites. Some appear to be teetering on the brink of financial sustainability.

The States probably needs to plan for extra subsidy to support its key cultural facilities. The size of the tourism industry in the past has probably helped to reduce the amount of subsidy that is required, but that is likely to be less the case in the future. It is common practice for the public sector to support the cost of cultural facilities. There seems to have been an approach in Jersey that investment in heritage and culture should be purely considered in terms of economic benefit and return on investment. Normally, however, if such investment has to be supported by state intervention and is as much to do with quality of life as it is to do with economic benefit.

To retain a certain amount of longer stay holiday business, the Island needs more quality self-catering. This is not easy to do because of the competition from residential.

It is also hindered by the fact that holiday lets and residential are different use classes under Jersey Planning law. This is intended to allow a lower quality of amenity for holiday let property than for normal residential but is probably having the effect of reducing the supply of self-catering accommodation. There has been development, however, and there are more applications in the pipeline.

The best hope for leisure tourism, however, is probably for short breaks. Many people now take a number of short breaks in addition to their main holiday. There is no reason why Jersey should not do well in this market and it has the foundations of a product that is well positioned to do so.

Although price will obviously be a consideration for some people taking short breaks, for many, other factors will be of greater impact. Accessibility and convenience are major factors in a short break, an area where Jersey has advantage in several key markets.

The most important factor of all is the quality of the experience. In this market, Jersey is not just competing against the destinations it traditionally regards as its rivals – the West of England, the Balearics etc. In fact, they are probably minor competitors. More significant competitors are probably city short break destinations like Paris, Barcelona and Prague. It is not easy competing in this market because the range of potential city break destinations easily and cheaply accessible to most Britons (and, indeed, Europeans) rises all the time.

The short break leisure market is an improvement on the old long stay holiday market in that it is not so concentrated in the summer months and is higher spend per day.

It is less satisfactory, however, in that it is less loyal – many people these days want a different experience every time – and is weekend-oriented, although not entirely so.

If Jersey is to be successful in this market, it probably needs to attract a more "cosmopolitan" audience than it does now. It needs less of the bucket and spade image. It needs a wider range of hotels that are attractions in their own right. It needs to emphasise the quality of the food offer. It needs to offer a quality urban experience in addition to the beach and countryside experience. It needs to offer a quality cultural offer. It needs to focus more on the attributes it has that makes it special and different from other places.

Improving the offer in St Helier, and its image, is probably the key to this, and in that the Waterfront offers the most potential to create a product that really is special. To do this it needs to emulate in style (not size) the best world-wide "festival waterfront" practice – places like Cape Town's Victoria and Alfred Waterfront, Sydney's Darling Harbour, Baltimore's Inner Harbour etc. It also needs to fully connect the waterfront offer to the town centre.

There also needs to be more focus on product where there is a distinctive Jersey USP, ranging from Durrell to Jersey Royals.

Success with this short break leisure market will still, however, probably not be enough to sustain a thriving tourism economy. That probably also needs a combination of corporate and conference tourism.

Achieving a product that can mix all three – leisure, corporate and conference - will prompt investment. This can be seen in all major regional cities in Britain that, as they have enjoyed renaissance in the past decade, have witnessed tremendous hotel investment. The bread and butter return to that investment is provided by mid week corporate and conference business, with the jam provided by weekend short breaks and functions (weddings being increasingly important). The same is now taking place in Jersey, with huge investment at the top end of the market. By the end of 2007, about a quarter of Jersey's hotel rooms will be in the 4-5 star range. It will probably represent 50% by value.

The strength of corporate business tourism in Jersey is largely reliant on the continued health of the Financial Services industry and its suppliers, and any other economic development that the island can nurture.

The potential contribution of conference tourism depends on developing appropriate facilities and overcoming the disadvantage of a relatively inaccessible location.

There is, naturally, much concern on the island about the situation with tourism and hankering for a new strategy. Unfortunately, there are no simple answers. The investment taking place at the moment shows that there is likely to be a positive future for the industry, but it will be with a different product to that which has dominated for the past 40 years. All of the ideas suggested in this report are directed at helping Jersey to make this transition.

2.2 Summary SWOT

Strengths

- Varied coastal offer – golden sands, attractive coves, cliffside walks.
- Particularly attractive and distinctive gardens – both private and public. Floral USP encapsulated in the Battle of the Flowers, an event with heritage, distinctiveness and overtones of Sienna's Palio, albeit a bit dated.
- Good range of things to do, all easily accessible.
- The prosperity created by the Financial Services Industry sustains a quality of retail and food & beverage offer that would not normally be expected in a community of this size.
- It is also prompting investment of about £80 million in hotels – new and refurbished – in St Helier to create a luxury product with no equal for a community of its size, and better than most regional cities in Europe. In addition to greatly improving the island's capability to attract conferences and persuade business people to stay longer, it provides a product attuned to the growing luxury short break market. It also gives the island an excellent spa offer.
- International conservation icon in Gerald Durrell and the work of the Durrell Wildlife Conservation Trust.
- Strong, imaginatively presented, heritage attractions. The story of the wartime occupation has particular interest, and there is an exceptional product – the Jersey War Tunnels – associated with it.
- Relatively strong retail offer in St Helier compared to towns of a similar size.
- Food icons in Jersey Royal and dairy.
- Good network of walking and cycling paths and quiet lanes.
- Some of the best surfing in Europe.
- Some of the best sea fishing in Europe.
- Reasonable golf offer, with the advantage of the courses being seaside links.
- Some strong flagship events and a range of smaller events.

Weaknesses

- Too similar to the UK to feel "foreign" to UK visitors.
- The Island appears to have become expensive compared to other destinations.
- Image is indistinct – both Jersey and St Helier.
- Perceived to have nothing special to offer as a destination.
- Associated with cheap package tour, bucket and spade tourism, that is in long term decline. Even after new investment in St Helier, about 85% of the island's hotel rooms will be relying on this market.
- Insufficient self-catering accommodation to cater for the family holiday market. The planning system provides an impediment to the development of self-catering.
- Hotels are relatively small and do not have the leisure facilities that those in other holiday areas typically boast.
- Most large accommodation is town based, without sea views and immediate proximity to beaches.
- No branded accommodation (with the exception of the Radisson-SAS in construction).
- Lack of staff and difficulty in accommodating them.
- Lack of night-life or activity in the town centre after shops close.
- Strategic leadership of destination development does not seem to be as strong as it might be.
- Lack of combined attractions/transport ticket.
- Lack of golf resort and connection of the golf offer to the accommodation product.
- Events tend to be a bit bland in their theming, not doing much to highlight unique characteristics of Jersey.
- Lack of Sunday trading, a particular hindrance in terms of developing weekend break business.

Opportunities	*Threats*
• Greater focus to Cosmopolitan short -break market and conferences using new product that is well-suited to those markets. • Build on the qualities of St Helier to create and promote a very attractive "urban" experience to match the "rural" appeal of the Island. Especially to more effectively target short break and conference tourism. • Create a world-class "Festival Waterfront" integrated with the town centre as a primary means of doing this. • Develop a new visual arts facility in a landmark building as the focal point of the waterfront development. • Develop a conference centre to broaden the customer base for the accommodation sector and anchor a quality "Festival Waterfront" by attracting a different type of tourist at different times of the year to other market segments. • Exploit more the Durrell brand, which has international resonance through development, marketing, and conservation related events. This could include the development of a themed hotel. • Imaginatively exploit the accessibility advantage for short breaks by imaginatively reducing the travel time and hassle factor. • Create a strong Christmas shopping offer and Winter Festival, using the Canopy of Lights idea to great a unique selling point and developing an extensive offer around it. • Exploit the floral USP. • Use the island's sports facilities to create team competitions that have good fit with accommodation capacity on the island. • Integrate the promotion of the tourism offer with the promotion of other Island exports as New Zealand does so effectively. • Create a public-private destination management organisation to more effectively respond to market trends and release private sector resource. Possibly integrate town centre management with it (as CV One in Coventry).	• Continuation of long term decline in visitor numbers places more tourism operations under threat and imperils cultural and heritage attractions. • It also imperils the viability of the air network from the Island and the ferry services. • Further decline in tourism makes Jersey's economy even more one-dimensional.

2.3 Possible Projects

2.3.1 Quick Wins

- Festival of Light (particularly upgraded canopy of light).
- Jersey Fluke Festival.
- Cluster management/marketing structure.
- Gorey Festival Waterfront initiatives.
- Team sports competitions.
- Information Map upgrade.
- Jersey strapline.

2.3.2 Development Plans

- Feed ideas in this report and other groups' work into EDAW's masterplan for St Helier, currently in preparation.
- Detailed plan for new "Destination Jersey" partnership.
- Air routes network.
- St Helier Festival Waterfront.
- Self-catering development/Jersey Cabin design.

2.3.3 Options Appraisals

- Durrell Centre (appraisal underway).
- Elizabeth Castle.
- Tourism Golf Course/Resort (work underway)
- National Gallery.
- Fort Regent.
- Cruise terminal (appraisal underway)

Section 1: Destination Audit

1. Markets

1.1 By Geography

Strengths	*Weaknesses*
• Easy accessibility from most parts of the UK on scheduled services. • A safe, familiar destination to UK consumers, especially those of an older generation. • A particularly good destination for UK families with young children.	• Very high reliance on the UK. • Lack of "foreignness" may put it at an increasing disadvantage compared to rival destinations in the UK market. • After showing growth in the early 1990s, visitors from most continental markets have declined dramatically over the past c 10 years. This probably has a lot to do with the strength of sterling, which appreciated substantially in 1997 after Black Monday. When Visiting Friends and Relatives are stripped out, leisure arrivals to the UK show a similar trend, although not so extreme. It will also be to do with reduction in marketing spend in those markets and withdrawal of key travel operators.
Opportunities	*Threats*
• Development of new routes to the continent, along with a new style of product, can help to resuscitate continental markets. • Perhaps look imaginatively at how the accessibility advantage can be exploited to increase appeal to short- break market. Luggage delivered direct to hotels/hotel check in, for example? Can Jersey give itself an edge by cutting travel time and inconvenience to a minimum?	• Proliferation of low cost routes from regional UK markets may further undermine the UK market (especially). • Arrival of low cost operators may cause withdrawal of established scheduled service providers.

Overall Assessment

UK market likely to remain key, but different product needed. Route development to continental cities, with accompanying development of a quality offer and positioning, is key to development of those markets. Further afield probably not generally viable for concentrated development, although there might be niche markets, especially for the luxury product, in markets like Russia.

1.2 By Purpose of Visit

1.2.1 Leisure

Strengths	*Weaknesses*
• Strong on mid-market independent hotels that appeal to empty nesters. • Investment currently taking place in upper range hotel accommodation that will have appeal to DINKS and SINKS[1]. • Good offer for visiting sailors.	• Heavy reliance on 1 and (although now to a limited extent) 2 week holidays, a market in decline. • Weak on self-catering accommodation, which is now often a requirement for families. It is increasingly the accommodation of choice, even for short breaks. • Lack of timeshare
Opportunities	*Threats*
• Develop more short-break business from DINKS[2], SINKS and ABC1 families. • Encourage investment in self-catering accommodation, possibly time share, including conversion of hotel stock that is suitable for conversion. • Convert more historic properties to self-catering to provide an offer of some size and distinctiveness, one that could generate a lot of publicity for Jersey. • Design a special "Jersey" cabin that can be cost effectively used in appropriate locations such as redundant farmland. • Use the Festival Waterfront development to increase the appeal of the island to people who have their own boats.	• Continued decline of core markets without replacement.

Overall Assessment

Further rapid decline in existing markets almost inevitable, with further loss of stock and much pain. Different offer based on self-catering and short breaks needed.

[1] Single Income, No Kids

[2] Dual Income, No Kids

1.2.2 Corporate

Strengths	*Weaknesses*
• Largely driven by Financial Services Industry and suppliers to it e.g. lawyers. • Substantial new investment in hotel stock in St Helier is aimed at this market and should persuade corporate visitors to stay overnight rather than making a day trip.	• Comparatively small proportion of overall island business, although a substantial proportion of the upmarket hotels in St Helier.
Opportunities	*Threats*
• New routes to some key business destinations e.g. Zurich.	• A decline in the Financial Services would have a knock on effect on the one healthy sector of the tourism industry. • Growth of video conferencing may reduce the need for personal visits. • Over supply.

Overall Assessment

Excellent product is in the offing. It will be a major asset to the Financial Services industry.

1.2.3 Conferences

Strengths	*Weaknesses*
• Jersey has the attraction of being a "get away" destination without being regarded as extravagant. • Because of its network of air routes, it is a good location for a conference where people are coming from a variety of different parts of the UK.	• The main facility on the Island was provided by the Hotel de France. Has been out of action since destroyed by fire. • No dedicated conference centre. • There may not be enough top quality accommodation to support a conference centre.
Opportunities	*Threats*
• Reopening of Hotel de France conference centre. Main conference room will seat 800. Plus conferencing facilities in other up market developments. • The trend is for smaller conferences, which will suit the emerging island hotel-based offer. • There is a measure of agreement that there is potential for a dedicated conference centre. Would compete with	• A purpose built conference facility may be unaffordable and/or not financially sustainable..

places like Dublin i.e. places to get away to, but not too exotic. St Helier is the obvious location because of its hotel stock. It could prompt further investment in the hotel stock. Obvious location is perhaps the waterfront - convention centres have provided key anchors for the festival waterfront developments. in places like Sydney and Baltimore. One consultee suggested Town Park because of its proximity to hotel stock.

Overall Assessment

Excellent product for hotel based conferences now in the offing. Assessment of the markets for a conference centre needed before key sites are committed.

1.2.4 Cruises

Strengths	*Weaknesses*
• Jersey has good infrastructure (buses etc) for coping with the large numbers that cruise ships disgorge (up to 1000). • It is considered to have a better offer in terms of retail and attractions than Guernsey. • It offers cruise lines the opportunity to keep their duty free shops open while they are in port.	• Larger ships are not able to berth in St Helier. • Inability to bring larger ships alongside at the moment. • Inability to compete with St Peter Port with its natural berth and attractive backdrop.
Opportunities	*Threats*
• A cruise berth in St Helier, especially if it is near the proposed Festival Waterfront, could provide an excellent backdrop and help to sustain activity in the development and in the town centre. • Infrastructure for cruises British/French/Irish waters is improving steadily with investment in terminal facilities.	• Spend by passengers may not justify the investment. .

Overall Assessment

If the current study suggests that a cruise terminal would produce a good return on investment, a location that makes it a backdrop to the Old Harbour and allows passengers to easily walk into the town would be optimal.

1.3 Psychographic

In simple terms, *certain types of destination experience attract certain types of customer*.

Locum uses a segmentation model called *ArkLeisure* as a framework for considering this. The model was developed by Arkenford Research on behalf of VisitBritain, the national tourism agency, to provide a more effective means of categorising people according to their leisure behaviour. It categorises people into eight groups and shows, for example, which brands and experiences they like most.

The segments on the right hand side of the model tend to be of an independent disposition, whereas those on the left hand side tend to be more inclined to follow what others do and to be, as a result, more brand oriented. The segments at the top end of the model tend to be younger, more innovative, and bigger spenders.

Figure 2: ArkLeisure Segmentation Model

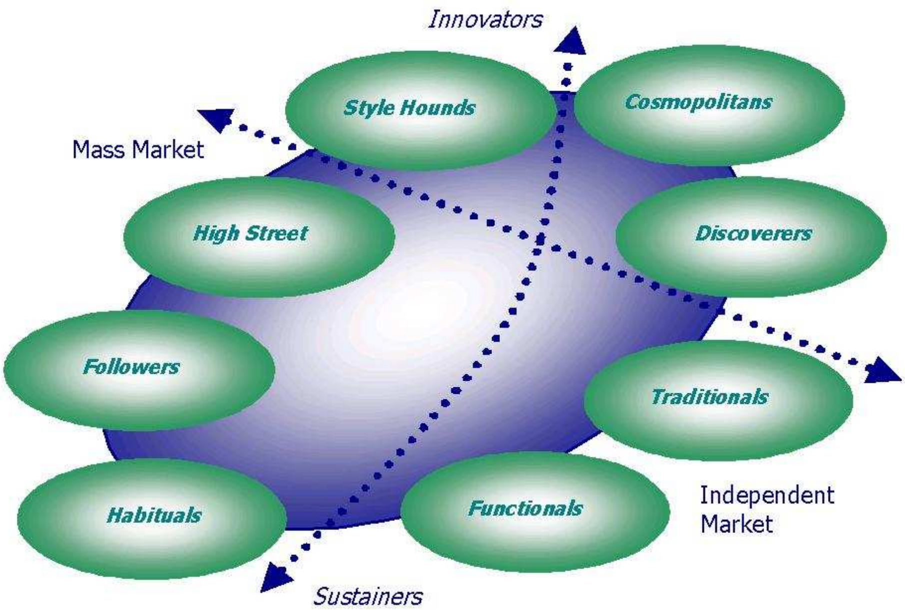


Figure 3: Brief Description of the ArkLeisure™ Segments

MAIN SEGMENTS IN THE ARKLEISURE SYSTEM			
STYLE HOUNDS	**HIGH STREET**	**FOLLOWERS**	**HABITUALS**
'Young Free Single', impulsive Fashion counts Brand counts Looking for fun with friends Most not seriously sporty	Main stream early adopters Followers of high street fashion Care what others think Happy to buy packaged options	Strongly influenced by what others will think Don't want to be seen as old fashioned Less active Slow to adopt Avoid risk	Largely inactive, low spending group Very traditional, strongly resistant to change Risk adverse Value relaxation, peace and quiet
COSMOPOLITANS	**DISCOVERERS**	**TRADITIONALS**	**FUNCTIONALS**
Strong, active, confident Style & brand important, but as an expression of their self made identity. High spenders especially on innovation and technology Looking for new challenges, new experiences, Globetrotters	Independent in mind and action Little influenced by style or brand but interested in new options Buy on function and value to them Looking for new and educational experiences	Self reliant internally referenced Slow to adopt new options Strong orientation towards traditional values Value individual attention & service	Self reliant Price driven Value function over style Traditional values, but interested in new experiences, not risk adverse

The following table lists in order the segments that are probably attracted to Jersey at the moment and the implications for the Island.

	Segment	*Characteristics*	*Implications for Jersey*
1	*Functionals* and *Habituals*	Older groups that typically form the core customer group in places like Jersey where there is a relatively traditional seaside offer and the accommodation is primarily mid-market. The Jersey visitor base is relatively old and loyal, which is characteristic of these groups, especially Habituals. They prefer package holidays. They like places where there are things to do but they do not have to spend much money. Their average daily spend is about a fifth of the higher spend segments. There seems to be an assumption in Jersey that as the population in the UK (and on the Continent) ages, its appeal will strengthen. This is not necessarily the case. The values of these groups were determined in the pre- and post War austerity years. The Baby Boomer generation that is starting to retire now does not have the same values.	Jersey has particular appeal to these groups because it is accessible, safe and familiar. Its accommodation offer fits their preferences. They are, however, declining groups. They have the advantage that they are loyal and make repeat visits. They have the disadvantage that they do not spend much and the type of facility that they spend in is probably less likely to be the type of facility that local people are likely to value. In other words, their contribution to both the economy and in sustaining quality of life is not as high as other groups. *Jersey still needs to attract these groups to sustain the large part of the tourism industry that relies on them, but the key challenge is to find replacements.*

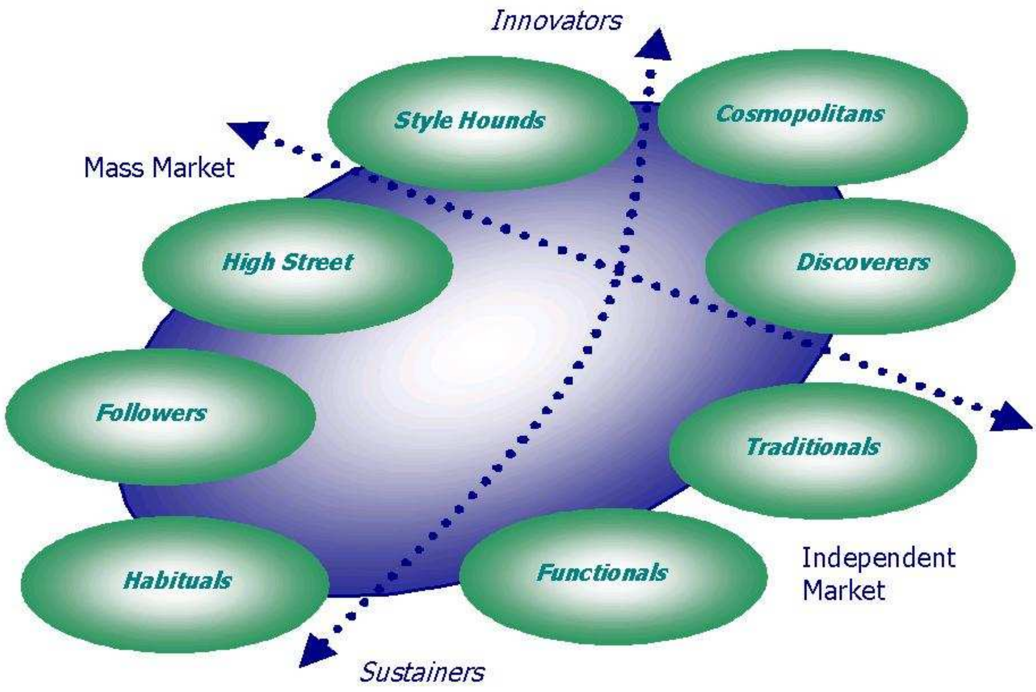
	Segment	Characteristics	Implications for Jersey
2	*Traditionals*	Like "exploring". Particularly fans of heritage (as, to a lesser extent, are *Functionals*) and are always found in large numbers at classic heritage destinations such as Cathedral Cities and Hadrian's Wall. Likes product like traditional country pubs. Not interested in brands. Medium spenders.	The quality of the heritage offer in Jersey and the independent nature of the accommodation offer will be attractive to them.
3	*Cosmopolitans*	The most active group. Likes activity of all sorts. Highest propensity to take short breaks and to travel far. Biggest spenders (apart from *Style Hounds*, when it comes to shopping). Particularly likes *independent* oriented product of *high quality* such as gastro-pubs and boutique type hotels. Considerably the most interested in culture and arts, especially contemporary arts.	*Should probably be the priority for market development*. The variety of experiences that Jersey offers/can offer will appeal to *Cosmopolitans* and they are probably relatively well represented. The quality of the food and beverage offer and the relatively strong retail offer in St Helier will have some appeal although it would be stronger if it was more distinctive and the café culture was stronger. Being able to promote a combination of fine urban style product with quality, accessible rural experience is likely to be the key. New boutique hotel and spa products will have particular appeal in this market. Mid range 2-3 star of no interest to them. The quality of the food and beverage offer is critical. The image of both Jersey and St Helier are probably key impediments in attracting them.
4	*Discoverers*	Have a diverse range of interests. Are big spenders, except on shopping. This segment most likes food and is very keen on gourmet markets etc. Are the primary market for activity holidays	*Should probably be second priority for market development*. The variety of experiences at Jersey will appeal, as will the quality of the food offer.

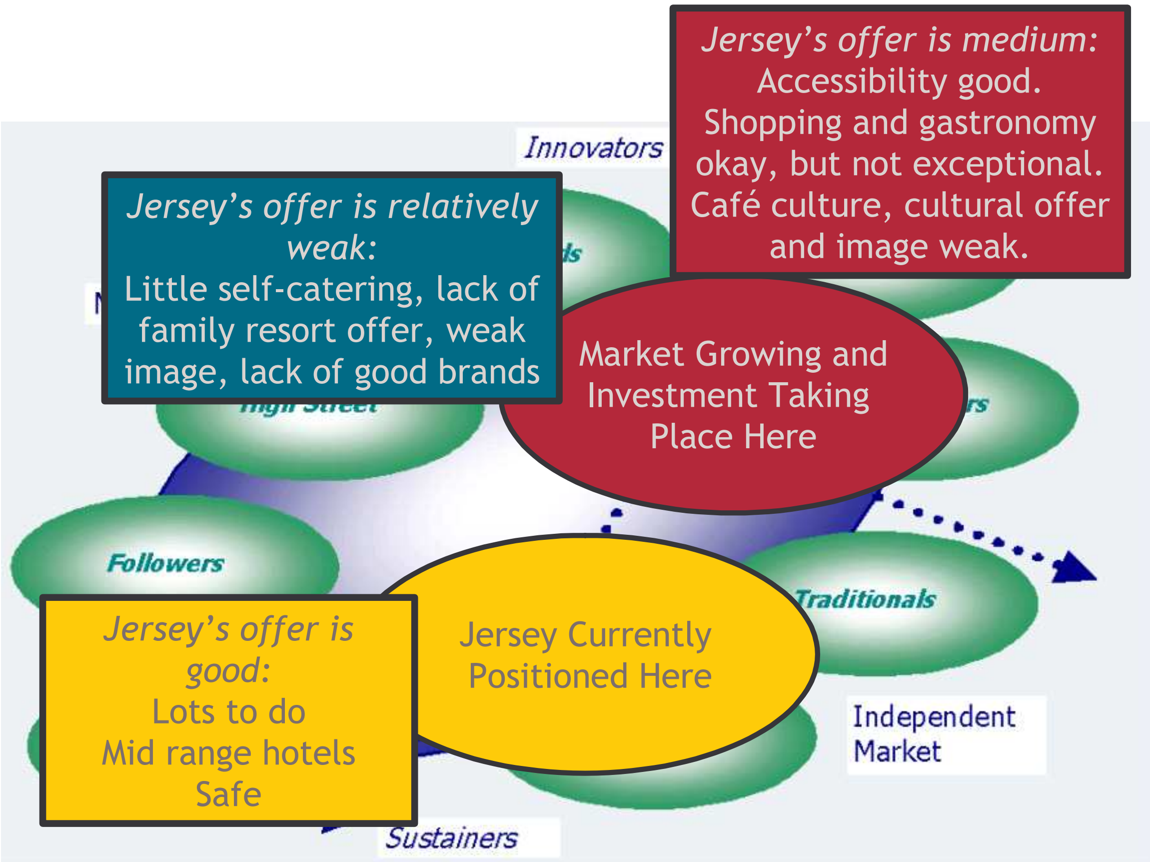
	Segment	Characteristics	Implications for Jersey
		- are the key market for the "high energy" product in places like the Lake District and Snowdonia.	Development of activities like watersports and surfing will appeal. Not the type, however, to want package holidays or the sort of mid market independent hotels that predominate in Jersey.
5	*High Streets* (and, to a lesser extent, *Followers*)	High spending and family-oriented. Particularly likes branded product, especially that which is middle to upper range.	Jersey has weak appeal in this market and it will be difficult to address that. Centre Parcs would be ideal, but as already experienced, difficult to achieve. The most likely attractor would be achieving a reputation as an excellent place to shop.
6	*Style Hounds*	The biggest spenders (when shopping is taken into account). They also spend a lot on accommodation and eating - they like product that is trendy. Tend to be young and like "thrill rides" - are the most likely to visit theme parks. Not on the whole, however, interested in quiet countryside pursuits.	The most likely attractor would be achieving a reputation as an excellent place to shop, allied to trendy places to stay and eat. Development of the surfing theme would attract them, as it has done in Cornwall. It is not just the surfing itself, but the youth culture that accompanies it.

Overall assessment.

If tourism in Jersey is to flourish In future, there seems to be little realistic option other than to focus on the top right end of the Ark Leisure model. The current bottom right positioning is in very evident decline. The market has already taken this view and it is driving investment.

Figure


Innovators
Mass Market
Style Hounds
Cosmopolitans
High Street
Discoverers
Followers
Traditionals
Habituals
Functionals
Independent Market
Sustainers


Innovators
Jersey's offer is medium:
Accessibility good.
Shopping and gastronomy okay, but not exceptional.
Café culture, cultural offer and image weak.
Jersey's offer is relatively weak:
Little self-catering, lack of family resort offer, weak image, lack of good brands
Market Growing and Investment Taking Place Here
Followers
Traditionals
Jersey's offer is good:
Lots to do
Mid range hotels
Safe
Jersey Currently Positioned Here
Independent Market
Sustainers

2. Attractors

2.1 Urban Experience (St Helier)

Strengths	*Weaknesses*
• UK High Street offer good compared to mainland towns of comparable size. • When the current spate of investment in hotels is complete, it will have the best hotel offer by far of a town of its size in the UK, perhaps in Europe as a whole. In terms of quality, it will beat most larger British cities. • Some unique elements that give the High Street offer character – recent Locum research found that "a good range of High Street shops with some shops that you do not see elsewhere" was the characteristic that people most liked in a destination. This summarises the offer in St Helier. • Some Bohemian elements to the retail offer e.g. La Colomberie. • The fact that it is a distinctively UK offer may be attractive to non-British markets. • A relatively good pavement café offer compared to comparable UK towns, although not particularly strong compared to places like St Malo and weak compared to UK cities. • The markets are of better quality than in most UK towns and are a clear strength. • The town is vibrant during the day. Pedestrianisation is relatively well advanced and public realm is of reasonably good quality (although not noticeably better than any equivalent UK town) and probably worse than many parts of the Continent. • There is a cluster of interesting jewellery shops. • A large proportion of the Island's hotel rooms (43%) are in the town, an unusual situation for a traditional beach destination. • The lido has been attractively refurbished – it is one of the few traditional seaside lidos in the UK	• Poor quality modern town planning and architecture has damaged the appearance of the town and negated its image of a genteel, Georgian seaside town. • Its image is probably indistinct, perhaps even negative for many people. • Main seafront esplanade - Havre des Pas – looking a bit shabby. • Limited nightlife. The town centre dies after 6pm. • No Sunday trading, a concern given the desire to attract a weekend-oriented short break market. • Closure of many hotels off-season reduces the potential to develop Christmas packages.

remaining. • Elizabeth Castle provides an iconic backdrop.	
Opportunities	*Threats*
• The Waterfront – especially "East of Albert" provides an opportunity to create a Cape Town style (albeit much smaller) "Festival Waterfront" which is well connected to the town centre. • It could be marketed in its own right as an attractive and sophisticated place to visit, adding an important dimension to the overall experience of the Island, one that is particularly attractive to high spend short break markets. • New North Pier seems to offer the ideal opportunity for a landmark building, perhaps containing the Jersey National Gallery. • Potential to create a strong Christmas shopping offer in St Helier. Canopy of lights provides a distinctive USP. • Fort Regent provides an opportunity for imaginative development that could be tourism related. • There is also potential for imaginative restoration of Elizabeth Castle.	• Development of the waterfront so far has been of unexciting quality and misses the opportunity to develop a waterfront of special character. .

Overall Assessment:

Making St Helier an exceptionally attractive vibrant town, with an image to match, should be a top priority because of the importance of the shopping/pavement café experience to visitors and because so much of the Island's accommodation stock is in the town.

The Waterfront offers great potential to achieve something special, but there seems to be a danger of the opportunity being lost to unimaginative development.

A Convention Centre that is fully integrated with the town centre offer could make a major contribution to these objectives.

Enhancing an attractive Christmas Festival could make a major impact in terms of reducing seasonality and enhancing the sustainability of retail development.

2.2 Festival Waterfronts

Strengths	*Weaknesses*
• A substantial leisure offer has been developed on the St Helier waterfront. Completion of Liberty Wharf will add critical mass and a different dimension. • Particularly attractive and lively waterfronts at Gorey Harbour and St Aubins. • Particularly attractive bay promenade and dining at St Brelade's Bay.	• Waterfront development has so far been perhaps a bit uninspired. • Lack of parking at the popular waterfront hamlets. • Their attractiveness, with their restaurants and shops, does not come across in marketing.
Opportunities	*Threats*
• Create a world class festival waterfront around the Old Harbour. • Develop and promote the "festival" product in these locations. They are ideal for arts and gastronomic markets and live music etc. • Develop local area masterplans to investigate possibilities for pedestrianisation and improved parking/access etc.	• Failure to exploit opportunities because of lack of imagination, resistance to traffic controls etc

Overall Assessment

People particularly like attractive waterfront places where there is a lively atmosphere, lots going on and nice places to eat.

St Helier Waterfront is probably the biggest opportunity for a transformational project.

The smaller hamlets also have a lot of potential, however. The States should work with those communities to make the most of their attributes, seek solutions to access problems etc., and promote them more effectively.

2.3 Museums and Heritage Attractions

Strengths	*Weaknesses*
• A very good range and quality There has been considerable investment in the heritage sector. • The Island has interesting stories. The wartime occupation is of particular interest, especially to a British audience. • The Jersey War Tunnels tell the story to a high standard. • The presence of fortifications from a	• Visitor numbers to heritage attractions have been falling in line with the fall in tourist numbers. (This is a similar experience to heritage attractions in similar situations on the mainland). • The only means that the Island seems to have at the moment of funding heritage projects is the Tourism Development Fund. While it is not unreasonable to see investment in heritage attractions

range of eras is a large part of the sense of place. • Mont Orgueil Castle has been restored by the Jersey Heritage Trust with imagination and flair. Holographic portrait of the Queen is exceptionally imaginative and should be featured more in Island marketing. • Museums like the Jersey Museum, the Maritime Museum and Samarès Manor are also of high quality.	as a means to economic development, it is more than that. Investment in heritage should not have to be justified purely in those terms.

Opportunities	*Threats*
• World heritage site status for the island because of its unique range of fortifications. • Elizabeth Castle seems to be the most obvious challenge/opportunity. Its restoration is likely to require significant funding.	• Because of declining visitor numbers, the Heritage Trust's finances are, in consequence, perilous. The current situation may not be sustainable and may soon reach crisis point.

Overall Assessment

Restoration of Elizabeth Castle is a priority. Ideally find resources to do so in a manner that does not simply duplicate Mont Orgueil. Commission an options appraisal.

2.4 Other Attractions

Strengths	*Weaknesses*
• The Durrell Wildlife Conservation Trust is of particularly high quality and is associated with an international icon (in Gerald Durrell). • A range of other attractions of a variety of different sorts and appealing to a range of different types of customer.	• Falling visitor numbers. Will probably be difficult to sustain so many attractions.

Opportunities	*Threats*
• Develop Durrell so that its profile as the recognised centre of international threatened species conservation is raised. Its role in leading the protection of threatened species has the potential to be iconic in its own right. • Some attractions that are currently positioned at the Traditionals/ Functionals markets could probably be repositioned and it would be advantageous if they were.	• Possibility of attractions going out of business.

Overall Assessment:

On balance, the offer is relatively strong and varied. Jersey should give priority to investment in attractions that are attractive to target segments and make a significant contribution to the quality of life of local people.

2.5 Visual Arts

Strengths	*Weaknesses*
• Art is on display at the Jersey Museum, Harbour Gallery and others, the Jersey Arts Centre puts on displays of contemporary art.	• Overall, the offer is relatively weak.
Opportunities	*Threats*
• A quality visual arts offer is consistent with an offer that attracts a cosmopolitan audience. Tate St Ives, the Guggenheim in Bilbao, and the recently refurbished de la Warr Pavilion in Bexhill, are examples of how an Arts facility can change the image of a destination and attract more affluent visitors. It is a type of use that is well suited to landmark architecture, albeit maybe a little predictable now. • The end of New North Pier seems to offer an obvious location for a landmark building, as centrepiece for a festival waterfront development. • A small but high quality permanent collection could be put on display from collections on the island. • The island could form partnerships with institutions in Britain and the continent to put on exhibitions from their collections. By engaging with continental institutions, it could create something that is distinctive to that offered by UK galleries. • Planning gain from the waterfront development could help to fund construction. There are a lot of wealthy companies and individuals on the island who would probably like to be associated with the project.	• Galleries are expensive to run. In addition to funding the capital cost, resources would have to be found to fund revenue costs.

Overall Assessment

On balance, the offer is relatively weak and is probably a strong candidate for investment. A quality arts facility would help attract the *Cosmopolitan*[3] segment and be a good fit with the new quality accommodation offer in St Helier.

2.6 Performing Arts

Strengths	*Weaknesses*
• The Opera House has been recently restored at a cost of £7.5 million. It puts on a varied programme anchored by popular touring productions. • The Arts Centre has a vibrant programme and is well used. • Fort Regent– mixed use leisure facility that stages large concerts and occasional conferences. Now tired and needs a strategy. • Jersey Live has established itself as a successful and popular regional popular music festival.	• The Opera House has had financial problems. It is not ideally located in relation to the rest of the town centre. • Fort Regent is now tired and needs a strategy. • Little by way of entertainment for visitors in the evening.
Opportunities	*Threats*
• Development of the Festival Waterfront in St Helier would create the opportunity for more live music etc provided as part of the restaurant/bar offer. • Elizabeth Castle might provide an opportunity for a summer programme of outdoor music and theatre.	• Inability for a small community to sustain a substantial performing arts programme.

Overall Assessment

The Festival Waterfront offers perhaps the best opportunity to expand the range of the offer, and Elizabeth Castle offers perhaps the best opportunity to create something special that could attract attention off the island.

[3] See Section 1.3, P20 for Details of the Ark Leisure Segmentation

2.7 Sport and Active Leisure

Strengths	*Weaknesses*
• Jersey has a good range of sports facilities and, with its relatively mild climate and reasonably priced accommodation, is an attractive location for teams to visit. • International quality links golf course at Royal Jersey. 2 other championship standard golf courses at La Moye and Les Mielles. • Other courses at Jersey Recreation Grounds (9 hole pitch and putt), Les Ormes Golf & Leisure Club (9 holes) and Wheatlands Golf Club. They do not require proof of handicap (i.e. golf club membership). • Exceptional 8 court indoor tennis complex at Les Ormes. • St Ouen's Bay is one of the best surfing beaches in Europe. 5 miles long. • Other good breakers can also be found at Greve de Lecq, Plemont and St Brelade's Bay. • Excellent sea fishing and diving. A number of operators. • Refurbished lido at St Helier. Might be the only surviving seaside lido in the UK – certainly, very rare. • Extensive network of cycle routes and quiet lanes. • Good network of walking routes. • Aqua Splash on the Waterfront has modern indoor and outdoor swimming, wave machine, flumes, slides etc. • Spectacular offshore reefs, Les Ecrehous, which can be visited by boat.	• Facilities not set up for golf tourism – as an indication, Jersey does not feature on www.golfbreaks.com, which features Europe wide golf break venues. • It is not easy to get access to the courses, and it is expensive for visitors – Les Mielles charges £26.50 for 18 holes on weekdays, and £30 at weekends. • Lack of quality golf resort. • Gaps in the off road cycle network.
Opportunities	*Threats*
• Develop one or more team sport competitions, perhaps at junior level, at a time of year where the islands hotels capacity and mild climate is a particularly strong advantage. Gothenburg in Sweden has been particularly effective in doing this – it has created, for example, the Gothia Cup International Youth Football tournament. It attracts 1,000 teams and 45,000 visiting spectators to the city	• Planning concerns may make it impossible to find location for golf resort development and construction of surfing centre.

every year.
- Development of a golf resort, perhaps at Plémont or St Catherine's Bay.
- Perhaps a golf course developed and owned in partnership by hotels on the island?
- Surfing centre proposed for Watersplash.
- Encourage more operators in the fishing and water activities area.
- Fill the gaps in the cycle network so that the island can be promoted as a place, which truly is exceptional for cycling.

Overall Assessment

Golf tourism is a significant niche, but needs special visitor oriented facilities, which the island does not currently have. Developing them should probably be a facility.

The use of sports tournaments to fill hotel capacity in the mid-range sector also seems to be an obvious opportunity.

The proposed surf centre at Watersplash seems to be a potentially exciting means of developing the surfing cluster, which could in turn help to dispel Jersey's dowdy image, providing it meets the planning development criteria for such a sensitive area.

2.8 Events

Strengths	*Weaknesses*
• Two large, major events seem to attract visitors to the Island – the Battle of the Flowers and the Jersey International Air Display. Jersey Live seems also to be developing into a significant attractor. • The Battle of Flowers is particularly distinctive and ties with Jersey's exceptionally high quality floral displays, both public and private. It may, however, be a bit dated. • Other events such as the Food Festival have been successful.	• The events programme is much as the same as can be found in most coastal resorts. Some of the more traditional events might actually have the effect of confirming impressions of Jersey as being old fashioned, provincial and unsophisticated. • The main events do not seem to be organised and managed in such as way as to maximise their tourism impact.
Opportunities	*Threats*
• Build on the food festival to create something that is more distinctive and uniquely Jersey. A Festival themed to Jersey Royals seems to be the obvious opportunity. • Other possibilities for events that have a theme that ties in with Jersey product	• Lots of money is spent on events that do not do much to change the image of Jersey or attract extra visitors at times when there is spare capacity.

could include lavender, cattle, seafood, fishing, sailing and surfing.
- Revitalise the Battle of the Flowers so that it is capable of making more of an impact off the island and of attracting visitors over a longer period of time. With significant development, it could achieve a considerably higher profile and make a more positive contribution to the whole Jersey brand.
- Put more priority on developing events that last for a period of time and, therefore, achieve more than simply attract visitors for a day or two. Developing the Christmas programme, or a top quality music festival in Elizabeth Castle, are possibilities.

Overall Assessment

The programme is reasonable, but needs more local spice and greater focus on events that last for a longer period and are designed with impact on the tourism sector as a primary consideration as opposed to an after thought.

2.9 For Children

Strengths	*Weaknesses*
• An attractive, safe place for family holidays, with a mix of activitiesr – from beach to family friendly museums • New indoor and outdoor swimming facility at the Waterfront. • Many hotels have indoor swimming pools. The Merton Hotel has particularly extensive indoor water play areas. • The Amaizin Maze has been investing in family oriented facilities with success. • The new spa facilities in hotels are attractive to affluent families who like to take short breaks.	• Lack of self-catering accommodation suitable for families. • Because of space and weather considerations, hotels do not have the facilities that competing resort areas boast.
Opportunities	*Threats*
• Given current market trends increasing self-catering provision and timeshare is key to restructuring the family market.	• The Island will continue to lose competitiveness.

Overall Assessment

Increasing self-catering provision is probably the key in to resurrecting the family market.

2.10 Gastronomy

Strengths	*Weaknesses*
• Jersey Royals is iconic. The roadside sales points are a distinctive feature of Jersey. • Seems to be a high number of restaurants per head of population. • Bohemia Restaurant and Bar has a Michelin Star and has shown that there is demand for product of that quality. • Quality vineyard and gastronomy offer at La Mare. • Markets (Victorian Central Market and Fish Market) • Jersey International Food Festival has been successful. • Ethnic festivals – Irish and Portuguese.	• Comparison of the number of highly rated establishments in Jersey with places like the Lake District and Cornwall suggests that it is, in fact, lagging in terms of the quality and range of its restaurant and gastro-pub offer. • Although listing restaurants, the Jersey.com website does not present a convincing case that Jersey food is anything special. • Nothing to distinguish Jersey International Food Festival from the food festivals that are common in other locations. • Little exploitation of the iconic nature of the Jersey Royal.
Opportunities	*Threats*
• Provide incentives to chefs who have trained in the best kitchens. • Give the Food Festival more edge and USP, perhaps by theming it on the Jersey Royal? • Promote food clusters such as Gorey, helping them to develop their attraction to foodies and add complementary activities like farmers markets. • Integrate tourism marketing with promotion of the Island's food produce. • Think about how food oriented events can help to encourage improvement in the restaurant offer – the Ludlow Marshes Food Festival is a good example of how this can be done. • Make more of Genuine Jersey • Attract a celebrity chef to the waterfront.	•

Overall Assessment

The quality of the food offer is one of the most important things that people are interested in when taking short breaks. Although Jersey has quantity, it probably does not have the quality in depth that characterises competing destinations. Improving that situation should be a priority.

3. Infrastructure

3.1 Accommodation

After a substantial period of relatively little investment in the hotel sector, there has been a flurry of investment, and most of it has been in the luxury end of the market.

All of the up-market developments have included high quality spa facilities and the Island will soon have a substantial spa product.

This replicates the type of investment which is being seen in larger regional cities in the UK and is probably serving a broader mix of business than is typical of the existing 3 star and below stock. Whereas most of the latter are likely to be relying primarily on package tour leisure tourism, the new investment is targeted at a mix of corporate, conference and short break leisure tourism.

Unlike on the mainland or the Continent, however, there has been no investment in the lodge sector (i.e. chains such as Travelodge, Holiday Inn Express, Premier Travel Inn, IBIS).

This is perhaps a reflection of perception that the mid-market is crowded. It may also be because of a compulsory assessment system that may have had requirements that went outside the standard layout of the hotel companies.

Lodge hotels are operating, in effect, in the 3 star range and typically offer a better – although characterless – facility than most independent 3 star hotels. Any such investment will be a threat to existing stock, but that should not be a reason for resisting it.

3.1.1 4-5 Star

Strengths	*Weaknesses*
• Longueville Manor and the Atlantic have international reputations for their quality. • The Club has recently opened as a boutique townhouse hotel and is trading well. • The Royal Yacht is currently building a substantial extension and the Grand plans to upgrade to 5 star level. • Investment in World-Class spa facilities at the Hotel de France and re-opening of its conference facilities. • 4 star Radisson SAS currently being developed on Waterfront. • Other quality hotels like L'Horizon and Pomme d'Or and some that are 3 star but near to 4 star.	• Lack of quality golf resort. • Quality product does not tend to be marketed as an entity at the moment.

Opportunities	*Threats*
• Promote Jersey as a place with accommodation of exceptional quality, especially to the short break market. • Develop a themed hotel at the Durrell Centre which would be a destination in its own right and focal point on conservation related conferences etc.	• Inability to sustain such a high level of investment at the top end. • Because most of them rely on business tourism to an extent, they will be vulnerable to any decline in the Financial Services industry.

Overall Assessment

The private sector is investing here and giving Jersey an excellent product. Should be the spearhead of repositioning of Jersey.

3.1.2 3 Star/Lodges

Strengths	*Weaknesses*
• A large amount of 3 star independent stock (1,942 rooms, 41% of all hotel rooms).	• No lodge hotels (e.g. Premier Travel Inn, Travel Lodge, IBIS, Holiday Inn Express). Planning application was made for a 40 room Travel Lodge at the Airport but not taken up. This has been the main sector for investment in the UK and on the continent and it is surprising that there has not been more interest in Jersey. It may be because of the prescriptive nature of the previous (compulsory) inspection regime. • Prices relatively expensive compared to competing package tour destinations. • Much of the product is good quality-wise, but some is not. • Very dependent on leisure tourism, so seasonal.
Opportunities	*Threats*
• Conversion of some properties to self-catering apartments. • Upgrade of others to provide boutique offer.	• The 3 star sector appears to depend very considerably on package tour operators. Although operators spoken to expressed confidence about the future, there is probably a substantial risk that this market will decline at a fairly rapid rate and may already be doing so. This is likely to be because people will increasingly expect 4 star standards, especially in terms of size of rooms, from holiday accommodation. The 3 star sector is particularly vulnerable to

	squeeze from branded lodge hotels and is increasingly attractive only to an older "habituals" market that will decline. • Further loss of rooms could imperil attractions and support businesses.

Overall Assessment

Too much stock in this sector and lack of international brands is probably a weakness. Retaining quality properties in the tourism sector should be a priority, but look for opportunities to convert to self-catering or upgrade.

3.1.3 1-2 Star

Strengths	*Weaknesses*
• Still a relatively substantial sector – 1,760 rooms, 37% of all hotel rooms.	• As per 3 star, but more so.
Opportunities	*Threats*
• Conversion to self-catering accommodation or to normal residential.	• Except for some hotels operating just below 3 star standard, probably not much future for this sector.

Overall Assessment

Too much stock in this sector.

3.1.4 Self-Catering

Strengths	*Weaknesses*
• By contrast to serviced accommodation, the sector has seen growth in recent years • New 110 bed YHA hostel at St Martin. • 4 campsites (total capacity 1,250). • Conversion by the Jersey Heritage Trust of redundant defence installations to self-catering units has been successful and demonstrated that there is a market.	• Little stock by comparison to competing holiday destinations. • The fact that holiday lets are a different planning use class to residential is probably a deterrent to expansion of stock. • Limited camping capacity.
Opportunities	*Threats*
• Planning application made for 40 log cabin style holiday cabins at Les Ormes Golf Course. Has 8 indoor tennis courts.	• Failure to recognise the shift in preference from serviced accommodation to self-catering,

A lot of people want to come for tennis. • Application has also been made for cabins at Amazin' Maize. • Design a special "Jersey cabin" that could form a distinctive offer for the island that is in keeping with its vernacular architecture and its precious landscape. • Convert more historic fortifications etc to self-catering units, developing a distinctive offer. • Timeshare	especially for longer breaks, will further undermine Jersey's tourism performance.

Overall Assessment

The accommodation of choice for families and many couples when taking a longer stay and, increasingly, when taking a short break.

Lack of self-catering and timeshare is probably the main reason why Jersey is much less of a family destination now.

3.2 Air Links

Strengths	*Weaknesses*
• Strong links to UK and Ireland with flights to 25 airports.	• Lack of scheduled services to the continent.
Opportunities	*Threats*
• Development of routes to the continent and running targeted marketing campaigns in the markets that they serve. • Possibly, arrival of other low cost providers. The island seems to have the accommodation capacity to take a lot of additional business.	• Further decline in UK tourism undermines the viability of scheduled air services. • Introduction of services from providers like Ryanair might threaten Flybe and British Airways services.

Overall Assessment

Development of continental links like to be the most valuable, along with new airlines from UK (without threatening existing routes).

3.3 Sea Links

Strengths	*Weaknesses*
• Condor Ferries runs services to Weymouth, Poole, Guernsey, St Malo, and (by slow service) Portsmouth. • Manche Îsles services from Granville and Barneville-Carteret have been increasingly reliable and successful. • The ferry companies are proactive in marketing the island and developing promotions.	• Rapid development of low cost air routes and car hire services have made ferry crossings less attractive. • Holiday tourism is not thriving on the UK south coast and Brittany, undermining the day visit market.
Opportunities	*Threats*
• New service in 2007 • Performance related subsidies.	• Further decline in UK tourism may render ferry services unsustainable. Any lost route causes a large amount of lost business.

4. Services

4.1 Information

Strengths	*Weaknesses*
• Good quality tourist information centre in good location in St Helier • Mass distribution map readily available and useful • Jersey Tourism produces a suite of high quality themed brochures. • Good blue badge guide services. • Heritage attractions and museums enable visitors to learn about the history of the island.	• .The map is commercially produced and all information is provided through advertising. Some font size is perhaps too small, the latest version reduces the map uncomfortably, and it needs a more contemporary design. • On-site interpretation of the island i.e. outdoor interpretation panels in places of interest – seems to be a little weak. • Lack of road signs to hotels probably causes major inconvenience to many visitors. • Although attractions seem to be relatively well sign-posted for near distance, long distance sign posting is weak. • Tendency to lump all product together, even where it appeals to different markets. • Jersey Tourism not represented at the Airport, although its material is distributed by an agent.
Opportunities	*Threats*
• Treat the map as the key information source. It would be worth investing public money to make it the definitive source of information about things to do and events etc. Other printed information material likely to be much less used in practice. • Improve wayfinding to help visitors.	• Visit spend is reduced by inadequate signage.

Overall Assessment

A good service is provided on the whole. Needs to evolve in line with changing style of presentation of the island. Improving the map and signs directing to hotels should probably be a priority.

4.2 Visitor Facilities

Strengths	*Weaknesses*
• Public toilet provision seems to be exceptional! • Easy Link Bus Service provides an effective and convenient method for visitors to get around. • Road train service around St Helier. • Reasonable cycle hire services.	• No Jersey combined attractions/transport ticket. • Limited on-airport car hire facilities (only Hertz and Europcar) provide some inconvenience. • The types of transport used are a bit old fashioned and tend to confirm the bucket and spade stereotype. There could perhaps be a more imaginative approach – making the SMART car a standard Jersey car hire etc.
Opportunities	*Threats*
• A Jersey Attractions and Transport ticket. Although it is not easy to negotiate financial arrangements that everyone is happy with, Jersey is a situation where a ticket that allows entry to most, if not all, attractions and use of transport, should be possible to agree. It should work in everyone's interest both in terms of increasing net revenue and footfall (and, thus, secondary spend). There are examples to emulate. • Optimise Easy Link Bus Service	

5. Management

5.1 The Four Roles

Locum has found that it is useful to think of a destination management "system" as having four key roles:

- Leading and Co-ordinating the development of the destination
- Attracting Visitors
- Serving Visitors
- Serving the Industry.

5.2 Role 1: Leading and Co-ordinating Destination Development

Strengths	*Weaknesses*
• The Tourism Development Fund provides funds for tourism development, albeit on a relatively low scale.	• Current tourism strategy is marketing oriented and there is not a clear leadership of the development function. • There seems to be a perception amongst stakeholders that the tourism industry can never agree about anything and is unable to respond effectively to consistently negative press coverage (it is common, however, for tourism operators to think that they get an unduly negative press. The press is always inclined to focus on the negative, but visitors are typically oblivious to it unless it is a major story that reaches the national press). • Many stakeholders feel that tourism development is not a political priority. • Relationships between the Hospitality Association (the industry's trade association) and Jersey Tourism have not been totally harmonious.
Opportunities	*Threats*
• Create a clear leadership function in an individual and a representative group, possibly in the form of a chief executive and board of a new PPP.	• The tourism industry has been in decline and, unless there is strong leadership that pushes a repositioning, the decline is likely to continue unabated.

Overall Assessment

This is an area where a new partnership could play an important role.

5.3 Role 2: Attracting Visitors

Strengths	*Weaknesses*
• Jersey Tourism markets the island. A Government Department. It has a relatively substantial budget given the size of the community. • Private sector consultees recognise that Jersey Tourism tries hard and generally does a good job. • Quality of website. Content is comprehensive and website is visually appealing and easy to navigate. Comes out top of the Google search list. Efficient on line bookings facility on web site (91% of hotels can be booked on online) . • Conference Bureau. A Public-Private partnership, private sector led and orientated. Mostly driven by industry members and, specifically, by operations that rely on this business. All are 4 star plus. Members put in £100,000, Jersey Tourism puts in £220,000. Employs 2 people. Successful. • New marketing material looks more contemporary.	• Reducing budget for Jersey Tourism. • Some criticism that Jersey Tourism is slightly out of touch and does not respond fast enough to changes "on the ground". • Marketing material looks very similar to that produced by most destinations in the UK. Does little to portray Jersey as distinctive. • The marketing tends to package all of the product together. There is perhaps too much tendency to put even handedness ahead of what is likely to be most effective in appealing to customers. • No strapline (equivalent to The English Riviera). • Marketing material tends to focus on Jersey as a family holiday destination with lots of pictures of young people and family activities – this is not a reflection of the nature of the offer, which is not particularly family oriented. • Official web site only has translations in French, Dutch and German.
Opportunities	*Threats*
• Develop a brand management system so that marketing concentrates on clusters of product where there is synergy. • Improve the capability of the private sector to have an influence on the marketing programme. • Be more results oriented in sales activity, with more use of commission as an income generator. • Create a public private destination marketing/management organisation along the lines of those that are now common in major UK destinations e.g. Marketing Manchester, The Newcastle-Gateshead Initiative. • Integration of marketing of Jersey for tourism purposes and marketing of	• Unless the marketing can show results, pressure to cut budgets will increase.

Jersey produce. New Zealand is probably the best example world- wide.

- Develop a strap line that reflects the new aspirations of the island.

Overall Assessment

Main opportunities for improvement likely to be: cluster based marketing, more sales/reward oriented approach, more private sector involvement in shaping activity, change of style.

5.4 Role 3: Serving Visitors

Strengths	*Weaknesses*
• Jersey Tourism has a function and manager dedicated to visitor services.	• Information provision at the Airport is perhaps not as coordinated as could be.
Opportunities	*Threats*
•	• .

5.5 Role 4: Serving the Industry

Strengths	*Weaknesses*
• The Jersey Hospitality Association represents the Industry and has in membership a high proportion of businesses that are directly involved in tourism.	• The membership situation is narrowly focused on core tourism businesses and therefore does not provide input from other businesses that might be interested in promoting the image of Jersey, including the retail sector.
Opportunities	*Threats*
• A public-private destination management organisation could give a stronger role to the private sector and give better representation to a wider range of businesses. .	

Overall Assessment

JHA is a good representational organisation and that should be its main focus, either independently or in a new partnership. Incorporation of a wider set of stakeholders that have an interest in Jersey's image and success as a destination is an opportunity for a new partnership.

Section 2: Development Ideas

1. Ideas for Principles

1.1 A Campaign

Tourism has had a lot of local negative publicity as visitor numbers have fallen. Numbers are likely to continue falling and there is likely to be more adverse publicity.

There is, however, lots of good news, particularly in the form of the investment that is renewing the upper end of the hotel offer.

We think that the new tourism strategy should have a high profile and a range of "signature projects" that make it clear to stakeholders, from within and without the industry, that a transition process is taking place and that they should be contributing to that transition.

This programme as a whole could perhaps be called something like "Destination Makeover" or "Destination Renewal".

1.2 Focus on Cosmopolitans in Product and Image Development

Section 1.3 discusses Jersey's market position using a segmentation model called Ark Leisure.

The private sector is currently investing about £80 million that is aimed at, in effect, the "Cosmopolitan"[4] section in that model (in addition to business tourists).

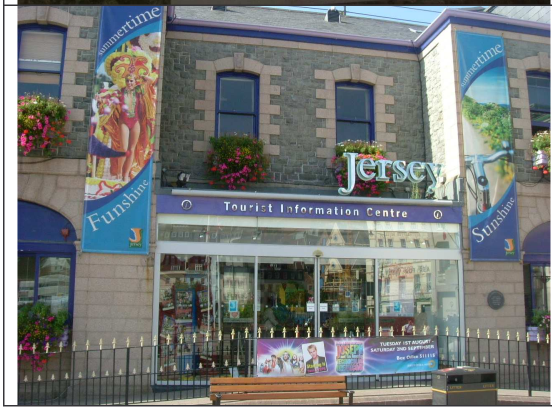
This is the future of Jersey as a destination. The product and the image of the island needs to be reoriented in that direction. In essence, it needs to be more stylish and sophisticated.

Suggested Principle: the priority for investment in new tourism product, events and image building marketing is development of a more sophisticated "Cosmopolitan"[5] offer.

[4] See Section 1.3, P20 for Details of the Ark Leisure Segmentation

[5] As above.

Figure 5: A New Approach

	The Jersey Heritage Trust's imaginative restoration and interpretation of Mont Orgueil is a good example of a modern, stylish approach that also characterises the new hotel investment in St Helier. The holographic portrait of the Queen is a good emblem. British, but different. Modern and sophisticated.
	Much of the more traditional presentation of the Island is out of kilter with the modern Jersey.

1.3 A Cluster (a.k.a. Brand) Management Approach

This does not mean ignoring existing markets.

Even once the new investment has been made, the majority of Jersey's tourism business will still be aimed at "Habituals", "Functionals" and "Traditionals"[6] in the ArkLeisure model.

This requires a different type of marketing, to different audiences.

Some product overlaps, but generally there is little to be gained from trying to market a "Cosmopolitan" product alongside "Traditional"[7] product.

Therefore, there is a need for an approach that groups different types of product together and markets it separately.

The cluster approach should also be used for niche marketing.

[6] See Section 1.3, P20 for Details of the Ark Leisure Segmentation

[7] As above

- By activity – businesses, for example, that have a particular affinity with surfing or golf.
- By market – businesses, for example, that are particularly aimed at the trendy style hound market.
- By location – businesses operating in places like Gorey, St Aubins and St Brelade's Bay. They could probably work together more effectively, with the assistance of Jersey Tourism, to develop and promote the visitor offer in their destination.

Ideally, those that are responsible for marketing it should have an affinity with the product that they are marketing.

Thus, the manager responsible for marketing to the "Traditional"[8] market should be au fait with traditional channels to market and the savvy techniques and promotions that can be used to reach those markets.

The manager responsible for marketing to "Cosmopolitans"[9] should have an empathy with the sophisticated approach that characterises that product and the more independent disposition of its customers.

Suggested principle: marketing campaigns should be based on synergistic clusters of product and should be managed by people who have empathy with those groupings and their customers.

1.4 Make More of the Things That Make Jersey Special

There are many things about Jersey that are a bit special and give it a distinctive sense of place.

It is widely recognised that one of the challenges for the Island in attracting visitors is that it does not have a distinctive identity.

In an age when so many British people – the core market - have developed a hankering for exotic climes, why should they make an effort to visit a place that is just like home when an hour or two more on the plane will take them to somewhere truly different?

We think that too many of Jersey's events, and too much of its promotional material, is too bland. It is hard to distinguish it from the activity in most UK seaside towns.

As an example, like many places, Jersey has developed a food festival and, like many places, it has been popular. There is no reason, however, why it should make great impact off the island. By contrast, the Whitstable Oyster Festival is famous and has played a major role in developing a "foodie" cluster in the town. Jersey is fortunate enough to

[8] See Section 1.3, P20 for Details of the Ark Leisure Segmentation

[9] As above

have two food icons – the potato and the cow – that theoretically could be the subject of imaginative events and promotions.

Figure 6: Distinctively Jersey

The best events in terms of promoting tourism are those that are enjoyable and popular in their own right, but also succeed in presenting the destination as an attractive place to visit at other times.

We applaud the work of Genuine Jersey. We think that its ethos should be reflected in the mainstream marketing of the island.

Where Jersey is a bit special	*Type of development that could take advantage*
Jersey Royal Flukes	The Fluke Festival
Jersey Cows	The Cow Parade
Durrell	The Durrell International Conservation Centre
Flowers	Modernised Battle of the Flowers, St Helier Botanical Garden.
Surfing	The Jersey International Surf Festival
Castles	Opera in the Castle, Stay in a Castle
Fishing	The Jersey International Fishing Jamboree

Suggested principle: product and event development and marketing will focus on areas where Jersey has special attributes compared to other destinations. It will use imagination and creativity to build a sense of place that is distinctively Jersey, but contemporary.

1.5 Add Zest

With Jersey having achieved considerable prosperity and become known for the presence of wealth, its image could become of a place that is sanitised and soulless.

In addition to more focus on authenticity and things that are special about Jersey, there ideally needs to be a bit more innovation and imagination in the product and way that it is presented.

Figure 7: Adding Character to the Offer

While Jersey has the kind of people mover common to British bucket and spade resorts..

	…trendy Brighton has introduced a range of artist designer tuc tucs to transport people around…
	… and Amsterdam has reinvented the rickshaw.

Suggested principle: Product development and marketing will seek to add character and quirkiness to the Jersey destination offer.

1.6 Encourage Development of Self-Catering

One of the main reasons that Jersey has declined as a tourist destination is that it has been unable to replace serviced accommodation stock with self-catering. Self-catering is accommodation of choice for many people now, especially in the family market.

This is reflected in the growth in the supply of self-catering in Jersey, albeit from a low base.

Some ideas for development of self-catering are:

- Encouragement of hotel property that is suitable for self-catering.
- Development of more self-catering units from historic forts and properties like Elizabeth Castle. Jersey Heritage Trust estimates that it could create about 35 units. This would provide an offer of reasonable scale that would probably generate a large amount of publicity for the Island. There are probably opportunities for conversion of other "character" properties.
- Design of a special "Jersey Cabin" to be used for provision of self-catering cabin type accommodation on suitable redundant agricultural land. Care would need to be taken that this does not add disproportionately to the cost (timber chalets are bought off

the peg), but it could, again, provide a distinctive Jersey edge and respect the local vernacular.

- Development of a Centre Parcs style product in Fort Regent.

Suggested principle: seek to encourage the development of quality self-catering accommodation to serve visitors.

1.7 Focus on St Helier

Most of the current investment in the tourism product is taking place in St Helier. This is mainly because it offers a bedrock of corporate tourist business supplemented with conferences and short break leisure.

This pattern is reflection of what has been happening in the rest of the UK and in many other parts of the world – the renaissance of central urban areas. Investment on a similar scale has been taking place in regional cities like Bristol, Leeds, Liverpool, Newcastle and Manchester. The fact that St Helier is much smaller but is still securing the investment is a tribute to the success of its financial services industry.

People like being in attractive urban environments these days, even when on a "get away from it all" holiday. Shopping is a central part of the experience for most visitors.

While St Helier has got many strengths, not least a good shopping offer for a town of its size, but is not special and has weaknesses.

Suggested principle: concentrate particular attention on making St Helier a town of special quality and on creating an image from it that is distinctive from that of Jersey as a whole.

1.8 Encourage True Excellence

If the public sector is to intervene to provide assistance to tourism businesses, our view is that it is probably best directed at helping those who have the willingness to invest to achieve true excellence. To help them use quality designers and chefs in planning their developments for example.

Figure 8: Encouraging excellence

	The Cumbria Tourist Board employed top designers to show what could be done to a 2 star hotel, a bed and breakfast, a hostel and a self-catering unit. The results were exhibited to the industry and resulted in a rash of new investment in more contemporary product, including an investment of £6 million in the Waterhead Hotel in Ambleside to create a stylish town house hotel.

Suggested principle: aim public sector support at facilitating best practice and showing what is possible as opposed to simply helping with less aspirational refurbishment.

2. Areas with Potential for Major Developments

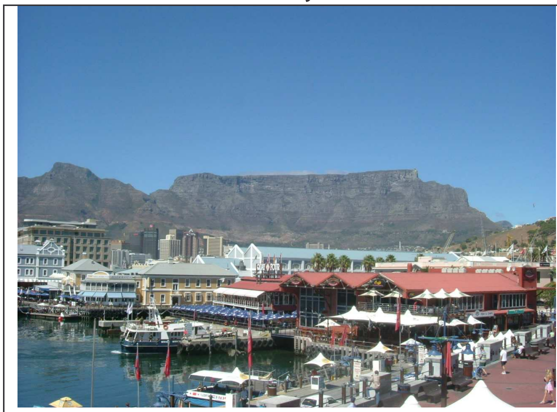
2.1 St Helier Festival Waterfront

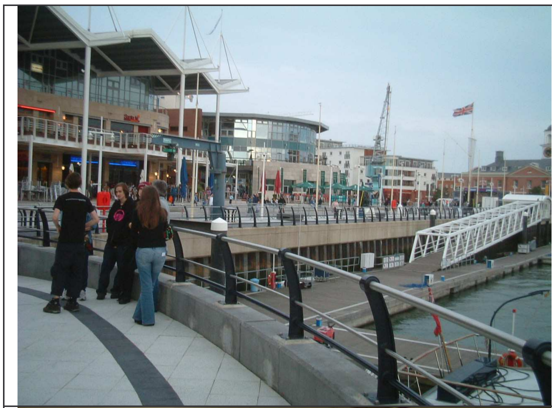
The most obvious development opportunity that would have a transformational effect on St Helier, and Jersey as a whole, would be a world class "festival waterfront". It would have a similar sort of feel, albeit on a smaller scale, of world class festival waterfronts like the Victoria and Alfred in Cape Town, Sydney's Darling Harbour and Baltimore's Inner Harbour. The best example in Britain is probably Portsmouth's Gunwharf Quays.

The key characteristics of these destinations are:

- Built around an attractive and vibrant waterfront
- A concentration of restaurants and bars with extensive outdoor seating
- A variety of attractions
- Lots of things happening - live music, markets etc.
- Actively managed to create the "festival" effect.

Table 1: Festival Waterfronts

	Cape Town's Victoria and Alfred is perhaps the best festival waterfront in the world. It provides a mix of experiences in a safe, convenient environment. It is, in effect, intensively managed public space. A combination of business and leisure tourists, many staying on site, locals doing routine shopping, locals seeking leisure, office workers and residents, give it a balanced user portfolio and helps to sustain vibrancy 18 hours a day.
	It is considerably the most visited destination in Africa. Lordland, the company that have developed it on behalf of the South African Railways Pension Fund, were junior partners in Portsmouth's Gunwharf Quays development.

	Gunwharf Quays has 50 bars, restaurants, and coffee shops. Although Portsmouth is considerably bigger than Jersey, it is much less prosperous. Few would have predicted that it could sustain an offer of this scale. .
	The Gunwharf offer is primarily branded and has upper end brands like Ha! Ha!, Jongleurs, Loch Fyne, Strada and Tiger Tiger. One of the reasons for the success of Gunwharf is that the parking is underneath the development, and is of high quality. Despite being adjacent to the most deprived part of Portsmouth, Gunwharf feels secure. It is actively managed – security guards immediately respond to any anti social behaviour.
	Nyhaven in Copenhagen is lined with restaurants, all with extensive outdoor seating areas. The ability to sit outdoors and watch water-based activity and people-watch are highly appealing propositions to many people.
	The same situation applies at Oude Haven in Rotterdam.

The Old Harbour has the ideal circumstances to create just a mix – interesting buildings, interesting and vibrant waterfront, a range of attractions, a range of hotels. Of particular advantage, it can be connected directly to the town centre to create a "Ramblas", as discussed below.

Table 2: Commercial Buildings

	An obvious opportunity to create an attractive quayside experience that forms an integrated extension to the town centre.

2.2 Other Festival Waterfronts

Developing the festival waterfront "east of Albert" is a medium to long term project requiring resolution of difficult issues.

In the meantime, Jersey already has waterfronts where there is the buzz connected with festival waterfronts – in particular, Gorey Harbour and St Aubins.

They are exceptionally pleasant but have difficult parking and traffic issues.

Table 3: Making the most of vibrant waterfronts

	With Mont Orgueil looming above it, Gorey is particularly special. Dedicating most of the quayside to the car at Gorey reduces the capacity to exploit the waterfront for leisure use, allowing the restaurants to spill out or markets to develop for example. The whole experience – castle plus waterfront – should be marketed as the destination experience.

	Electric bollards are increasingly used as a means of restricting traffic access at times when the pedestrian should come first.

2.3 National Gallery

The cultural offer in Jersey is relatively weak, and the most obvious deficiency is in the visual arts. We understand that there is a enough work of quality on the Island to form a small but fine permanent display.

An obvious approach would be to supplement this with permanent

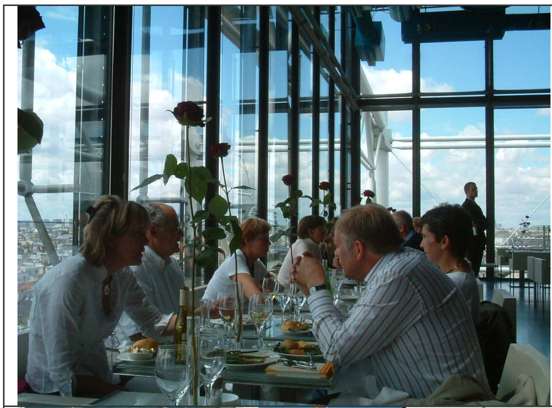
Our understanding is that the Waterfront Enterprise Board is able to fund a gallery building on Castle Quay. They have approached the Jersey Heritage Trust to discuss the possibility of them running it. Clearly, there will be a substantial revenue cost.

Being able to cover the capital cost of the build for a gallery building is a good starting point. Normally, corporate donors, wealthy individuals and certain grant giving trusts like the idea of being involved in gallery projects. It should in theory be possible to raise funds to perhaps secure a dowry to cover some or all of the running costs.

We are not sure, however, that Castle Quay would be the best location. We think that the optimal solution would be a landmark building at the end of New North Quay, providing a focal point for the festival waterfront and an icon for St Helier.

Table 4: Inspirations for National Gallery

	Designed by Catalan engineer/architect Santiago Calatrava, this US$75 million waterfront addition to the Milwaukee Art Museum is an attraction in its own right, like Bilbao's Guggenheim. It was largely funded by corporate and individual donation.

	The restaurant at the top of the Pompidou Centre in Paris is an example of the trend for top quality restaurants to locate in art galleries and could be an ideal fit in the location that we have suggested. The building would also be well-located to generate income from functions and could also generate funds from a good art/design oriented store.
	The Millennium Galleries in Sheffield are run by a trust similar in nature to Jersey Heritage Trust. They have a smallish permanent collection on display. In addition, they have a partnership arrangement with the Natural History Museum, the Tate and the Victoria and Alfred to stage special exhibitions from their collections.
	The excellent Louisiana Art Museum, on the coast north of Copenhagen, also has a strong focus on special exhibitions. Jersey could potentially look to form relationships with institutions on the continent like Louisiana, The Louvre and The Hermitage to create something a bit special.

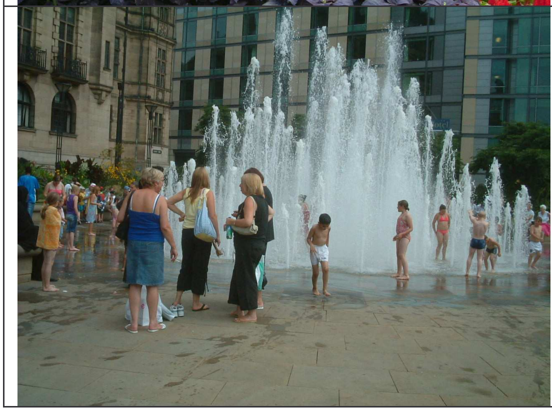
2.4 St Helier Botanical Garden and Floral Ramblas

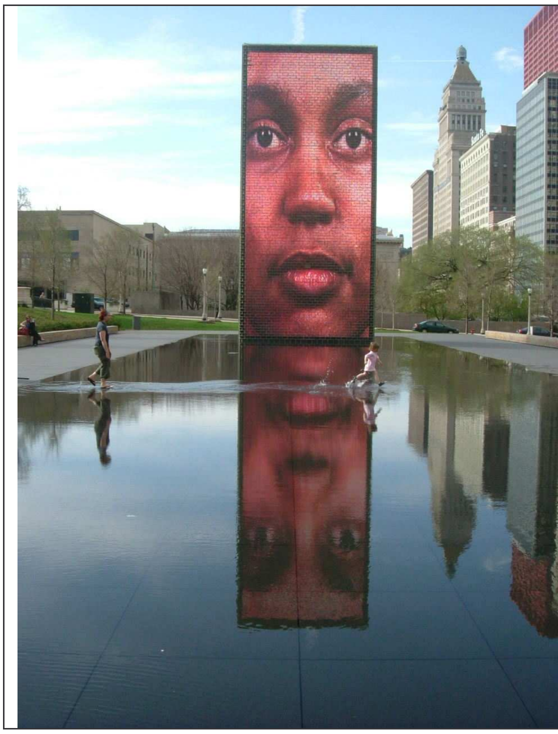
One of the key ingredients in Jersey's sense of place is its gardens.

One possibility would be to create a new rural garden of the nature of Tim Smit's Lost Gardens of Heligan or the Duchess of Northumberland's Alnwick Garden.

Perhaps a better approach might, however, be to create a modern garden as the focal point of the Town Park development in St Helier. This could help St Helier adopt the floral theme as a key part of its brand, in a manner that is contemporary. Whereas many cities have installed new public spaces in recent years, none in the UK have created a new garden.

Table 5: Inspirations for the Modern Garden idea

	The Duchess of Alnwick's new garden at Alnwick Castle in Northumberland is probably the most successful new visitor attraction in Britain in recent years. Even when it was still a building site, it attracted huge numbers. This was a reflection of the Duchess's flair. It is also a reflection of the amount invested – £16 million.
	Bryant Park, in mid-town Manhattan, is an imaginative treatment of a city square. It has a quality restaurant, outdoor café, "reading room" with newspapers, and regular events. It is run by a Business Improvement District i.e. businesses surrounding it pay for its upkeep.
	The lower gardens in Bournemouth are central to the town's sense of place.
	A play friendly water feature, as this in Sheffield, could be a useful addition.



This art installation in Chicago is a kid friendly water feature of a higher class then Sheffield's.

It has a very shallow pool between two rectangular blocks that have internal projections of faces, which reflect in the water. Periodically water sprouts from the pool.

This garden and the Festival Waterfront could potentially be thought of as anchors on either side of a dumbbell – akin to the department stores often positioned at either side of a shopping mall.

This could create a strong pedestrian flow through the town centre. This could also potentially have a floral theme - called something like the River of Flowers.

This could potentially transform St Helier.

2.5 Convention Centre

There is a significant body of opinion that believes that a convention centre would be a good investment in Jersey. A facility that could accommodate about 1,200 people seems to be the preferred option.

There are arguments in favour of this:

- Jersey is accessible from many parts of the UK
- It is a good location for organisations that want to feel as though they are getting out of their normal environment, but not to go anywhere too exotic
- There is substantial hotel stock in and around St Helier. A conference centre would help to sustain many of them and encourage them to invest in improved facilities.
- A convention centre could play an important role in sustaining a festival waterfront development in St Helier.

There are also arguments against however:

- Even with the current investment in up market product, Jersey will only have about 1,100 rooms in the 4 Star + sector, the main standard needed for conferences, which does not imply that it could cater well for conferences of up to 1,200.
- Conferences are getting smaller. The hotel-based product currently being developed should be able to serve most of them.
- It would be expensive to build and probably require an on going subsidy.

2.6 Elizabeth Castle

Elizabeth Castle is an icon of the island but currently under-utilised. A basic challenge for the States is how to prevent deterioration. Another is how to utilise the castle more effectively.

One option is to refurbish it as a heritage attraction, as the Heritage Trust have done to Mont Orgueil. While, however, it is clearly important to provide access to the Castle and interpret it well, we think it would be better if more imaginative uses could be find that provide a clear distinction to the product on offer at Mont Orgeuil.

Those options might include:

- Arena for a programme of summer cultural events;
- Self-catering apartments;
- A quality craft and design village.

Access is, obviously, an issue.

Table 6: Inspirations for uses for Elizabeth Castle

	Chicago has built an outdoor performance arena with a Frank Gehry designed stage. Perhaps a temporary structure of similarly innovative design could be constructed every summer to create the venue for a programme of theatre and music performances?

Snape Maltings, near Aldeburgh in Suffolk, is a collection of up market specialist shops, and a gastro-pub, located in character heritage buildings. It is also home of the Aldeburgh Festival. It is very successful, attracting 500,000 visitors a year, most of them from outside Suffolk. Salts Mill, near Bradford, is a similar offer.

2.7 Durrell International Threatened Species Centre

The Durrell Wildlife Conservation Trust are currently working on plans for large investment in the facility, including possibly creating a hotel from the manor house.

Gerald Durrell is an icon, and the work of the centre has the potential to be even more of an attractor in a world that is increasingly conservation minded.

2.8 Festival of Light

A "quick win" that could be developed rapidly would be a truly special winter offer, using the Canopy of Light idea as the focal attractor.

Christmas events that are a bit special are major attractors. The Lincoln Christmas Market, for example, is one of the most popular events in the UK. Strasbourg has been marketing itself as European Capital of Christmas since 1992 with great success. The Advent markets in mid-European towns and cities (and, increasingly, in French and British cities) are big attractions.

Jersey has developed a Christmas festival and could probably develop a strong Christmas shopping offer. It has the advantage of hotels in proximity to the shopping area and a reasonable shopping experience. With imagination, it should be possible to play on these advantages – for example, have drop points where visitors can leave their shopping, with it being delivered to their hotel.

It is not easy for it to compete against the Advent markets of Germany. It needs something a bit special that can match that offer.

The Canopy of Light seems to be just that and, with investment, could be the attraction that brings people to Jersey in the winter.

Using lights to attract visitors outside of the summer is the principle behind the famous Blackpool Illuminations, which now do more than anything else to sustain tourism business in the town.

Helsinki "Forces of Light" Festival, held each November, is a more contemporary version, using artists from around the world who specialise in light installations. Strasbourg employs a light designer to decorate its main Christmas tree every year.

Figure 9: Light Canopy in Innsbruck

There are lots of opportunities to develop complementary "special" Christmas attractions on the island, including:

- Turning the Living Legend into a Christmas Wonderland.
- Classy, mid European decoration of places like Gorey Harbour and St Aubins.
- Develop an Advent market or import one from Germany.

2.9 Fort Regent

Fort Regent occupies a key location and is in need of renewal. Some form of use for tourism purposes is a possibility. For example:

- Conference Centre (the implications have already been examined).
- Self-catering based holiday centre similar to that proposed by Centre Parcs for the Waterfront.

2.10 Cruise Berth/Terminal

The feasibility and options for a cruise berth and terminal for St Helier are being examined by a consultant at the moment. Currently Jersey receives few cruise visits because of lack of a tie-up berth and the relative attractiveness of St Peter Port.

Our view is that a cruise berth would ideally be located so that the ships form a backdrop to the festival waterfront and it is easy for passengers to walk from the ship to the waterfront and into the town.

2.11 Indoor Surfing Centre

The Watersplash site on St Ouen's bay was bought by Seymour Hotels in 2004 who have plans to redevelop the site to include a new indoor surfing centre (suitable for many different watersports), restaurant, club and bar, community facilities, including a learning centre. The development is currently at the planning stages and it is envisaged that a formal planning application will be submitted in Spring 2007.

The facility could form a key attraction for the island with the ability to attract visitors as well as local residents. It would also allow residents and visitors to use the facility year round, as opposed to only in good weather as is currently the case with Watersplash.

3. Ideas for Improved Destination Management and Marketing

3.1 Clarity on Responsibility for the Four Roles

Make sure that there is a clear leader responsible for each of the four roles:

- Leading and Co-ordinating the development of the destination
- Attracting Visitors
- Serving Visitors
- Serving the Industry.

3.2 Create a Cluster Management/Marketing System

Different types of experience appeal to different types of customer and need different styles of development and promotion.

As indicated elsewhere in this report, there is a central division in the Jersey offer between the "Traditional"[10] offer and the "Cosmopolitan"[11] offer which should, at minimum, be reflected in organisational structure.

There is also need for special attention for niche segments like watersports and golf.

People with empathy with the clusters should lead the work on them.

3.3 More Results Oriented Marketing

As a general principle, we think that there should be a split between sales-oriented marketing and image and awareness building marketing.

The former should be very results oriented and should have commission systems built in to reward success.

3.4 Stronger Public-Private Partnership

Feedback from our consultations suggests that there is a widespread feeling in the industry that Jersey Tourism is slightly out of touch with market reality and not quick enough on its

[10] See Section 1.3, P20 for Details of the Ark Leisure Segmentation

[11] As above

feet. That may not be fair, and there is always a risk of vested interests having too much say, but there seems to be a strong case for a more integrated partnership approach.

In recent years, there has been a trend towards giving responsibility for tourism management and marketing to public private sector partnerships.

All major cities in Britain now have them, as do key rural destinations and many continental cities. Most, at minimum:

- Undertake tourism marketing;
- Run the TIC(s);
- Run a conference bureau.

There are many variations, however. Other functions for which they can be responsible are:

- Town/city centre management;
- Events;
- Inward investment marketing.

Their main advantages are in:

- Being more commercial in their approach and entrepreneurial than public sector departments normally are;
- Releasing more funds from the private sector;
- Giving the private sector more input.

The following are some examples:

Gôteborg and Co	Company funded by the city and private sector that is responsible for developing and promoting the visitor economy. Is regarded as one of the most active and successful in Europe. Has a high profile leader in its chief executive, Claes Bjerkne. Has been particularly effective in developing events led tourism, putting focus on attracting events such as the European Athletics Championships and the Gothia Cup International Youth Football tournament, which attracts 1,000 teams and 45,000 visiting spectators to the city every year. Developed the conference and exhibition centre and made the city the primary conferencing venue in the country. Has also played a leading role in waterfront regeneration initiatives.
South Warwickshire Tourism Partnership	One of the first such partnerships. Core funding provided by two local authorities to promote the Shakespeare's Country brand. It

	is a limited company that runs TICs in Stratford upon Avon and Warwick and undertakes the marketing of the area. It has established a very successful call centre operation that is widely regarded as a model.
CVOne Coventry	The most integrated destination management organisation in Britain. A public-private partnership set up as a company limited by guarantee. It combines city centre management with tourism i.e. its members also include city centre retailers etc. It manages visitor services, including car parks and city wardens. It runs the events programme. It includes responsibility for all tourism services.
LeicesterShire Promotions	Like CVONe, a public-private partnership that also includes city centre management. It also has responsibility for marketing the county as an inward investment destination, under contract to the sub-regional strategic partnership.
The Mersey Partnership	A public private partnership that is organised in three divisions – tourism, economic development and inward investment. Its members include most of the leading companies in the city and one of its key remits is to improve the image of the city. It also has a branch system covering three areas outside of central Liverpool – Wirral, Southport and Wirral. Private sector businesses join at branch level and the local authorities concerned have incorporated their tourism resource into those branches. This maintains a balance between a co-ordinated
New Forest Tourism Association	A successful public-private partnership where the local authority provides the main resource in terms of staff and premises etc. The private sector members are, however, given considerable input into determining the work of the association through a series of executive committees. Designated a benchmark association by the (former) Office of the Deputy Prime Minister.
Qualmark, New Zealand	New Zealand has been particularly effective in making links between the promotion of the country's exports (wine, lamb etc) and its promotion as a tourism destination. One of the means of doing so was development of the silver fern as a symbol of New Zealand quality. The All Blacks and other New Zealand ambassadors wear it. It is also used in the tourism quality scheme, called Qualmark, which is unusual in that it goes beyond tourism accommodation and covers a wide range of visitor services. It is run as a partnership between New Zealand Tourism and the Automobile Association of New Zealand.

Tourism New Zealand's "100% Pure" is perhaps the best tourism advertising in the world.

3.5 Strong Leadership

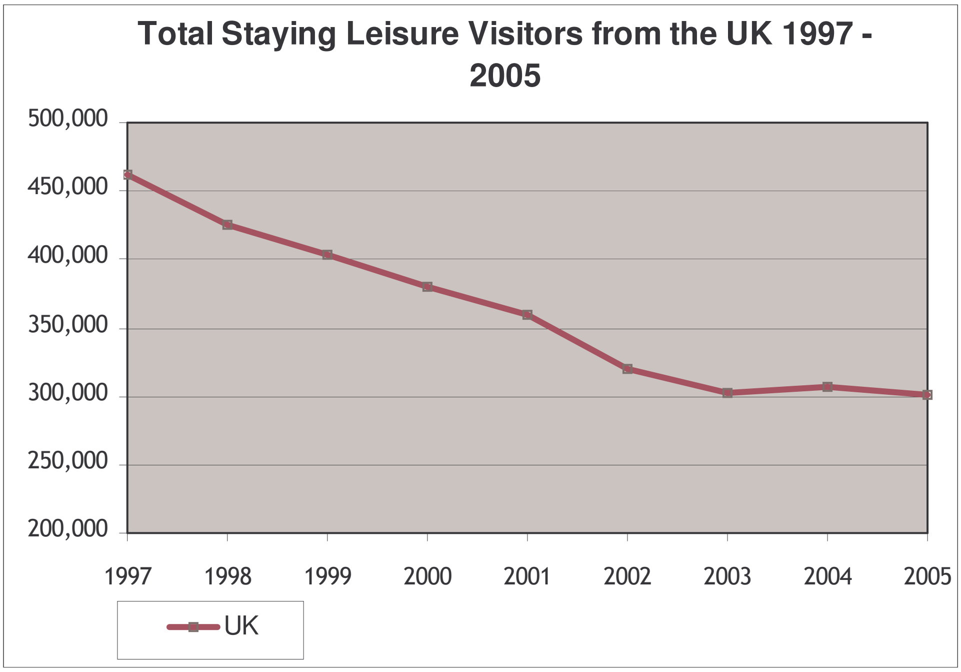
Because the tourism sector is important to both the economy and the people of Jersey, it requires clear leadership at the head of a strong management team. The organisation that will take Jersey's tourism sector forward, develop the product and market the Island in a way that delivers success will have to have the confidence of all elements of the industry and Government. Only if and when this leadership capability and management structure is present will the stakeholder confidence exist to make and implement the necessary strategic and operational decisions.

Section 3.4. outlines potential models for, and examples of, a closer public-private sector approach to the development of Jersey's visitor economy. We believe that this is a key short-medium term deliverable that should be addressed without delay. This work should address both functional activity and leadership/management structure.

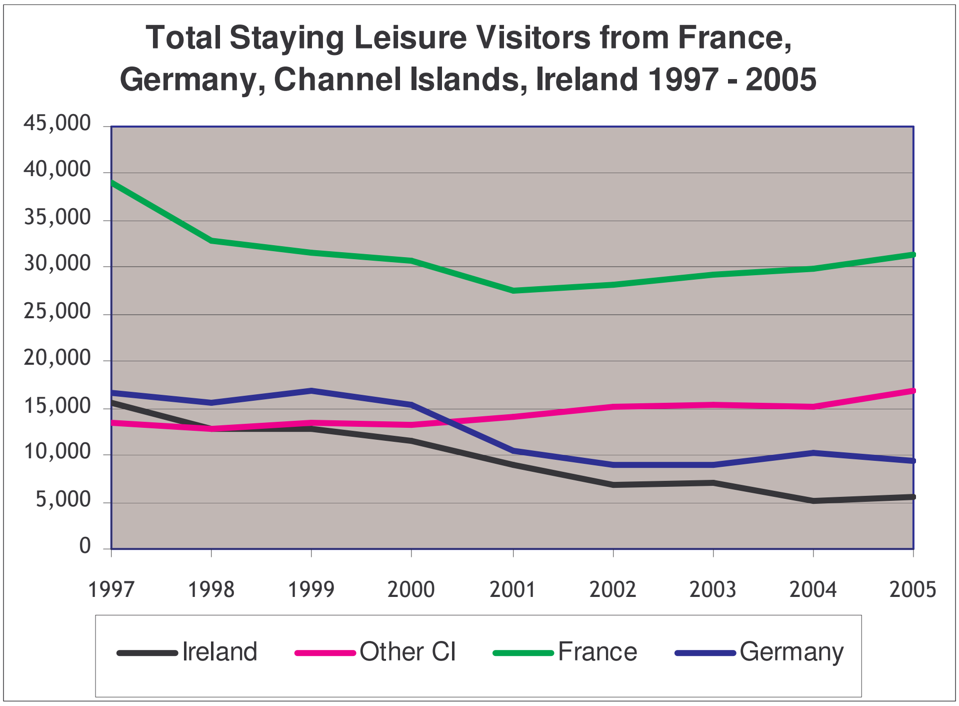
Appendices

1. Key Trends

1.1 Visits by source country

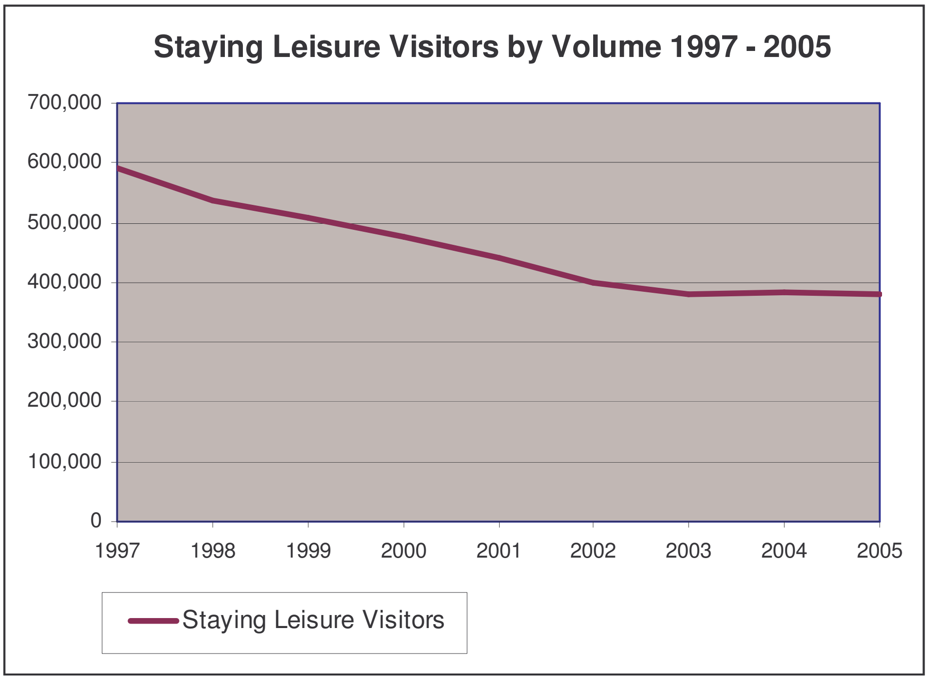


Jersey Tourism Annual Report 2005, (Figures are based on returns of visitor registration cards and the 1997, 2003/4 and 2005 Travel Surveys and refer to those staying in paid accommodation)

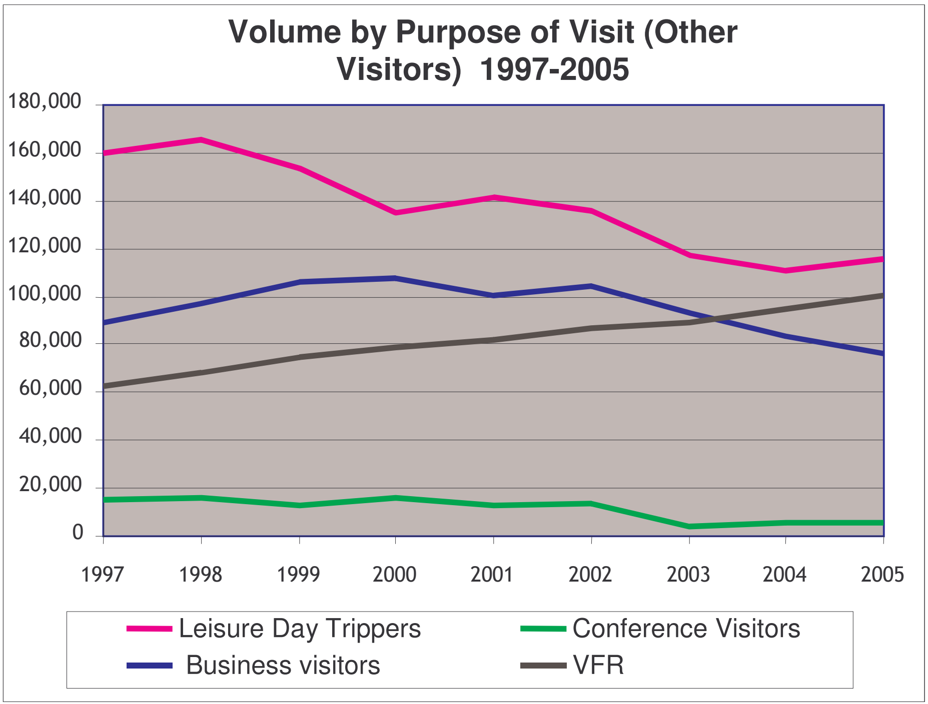


Jersey Tourism Annual Report 2005, (Figures are based on returns of visitor registration cards and the 1997, 2003/4 and 2005 Travel Surveys and refer to those staying in paid accommodation)

1.2 Volume by purpose of visit



Source: Returns of visitor registration cards, 1997, 2003 and 2005 Travel Surveys, Estimates for other years are based on registration card returns and Travel Surveys



Source: Returns of visitor registration cards, 1997, 2003 and 2005 Travel Surveys, Estimates for other years are based on registration card returns and Travel Surveys

1.3 Registered accommodation stock: serviced (rooms)

Hotels

Star grading	*No of Rooms*	*No of Hotels*	*No. of Hotels in St Helier*
5 star	88	3*	1
4 star	874	9	3
3 star	1,942	35*	12
2 star	1,730	32	17
1. star	30	2	1
Awaiting grading	42	1	1
Total	4,706	82	35

Jersey Tourism Complete List of Registered Accommodation

4 and 5 Hotels – Existing and Planned*

Hotel Name	*Star Grading*	*No of Rooms*
Atlantic	5	50
Longueville Manor	5	29
Eulah Country House	5	9
Chateau la Chaire	4	14
Club	4	46
De France	4	297
Grand	4	118
Greenhills	4	31
La Place	4	42
L'Horizon	4	106
Pomme d'Or	4	143
St Brelade's Bay	4	77
Radisson	4	190
Royal Yacht	4	110
Total	-	1,270

Jersey Tourism Complete List of Registered Accommodation, Consultation with Royal Yacht Hotel

Guest Houses

Diamond grading	*Rooms*	*Establishments*	*No in St Helier*
3	213	15	3
2	259	25	15
1	58	7	7
Awaiting grading	16	1	0

Diamond grading	*Rooms*	*Establishments*	*No in St Helier*
Total	546	48	25

Jersey Tourism Complete List of Registered Accommodation

Self Catering and Camping

	Establishments	*Rooms/Camping Capacity*	*No in St Helier*
Camping	4	1250	0
Self Catering	35	257	6

Jersey Tourism Complete List of Registered Accommodation

2. Comparative Information

2.1 Characteristics of Main Continental Markets Compared to UK

	UK	*France*	*Germany*
Total visits to Jersey in 2004	498,790	106,400	20,600
Staying leisure visits to Jersey 2004	301,460	29,300	10,100
Staying Leisure spend in Jersey 2004	£131.6 million	£4.77 million	£4.45 million
Share of Jersey staying leisure visitor market by visits	80%	7.8%	2.7%
Access	Flights from 24 UK airports, ferries from 3 UK ports.	Direct air routes St Brieuc, Ferry routes from 4 points on the North eastern Coast (St Malo, Granville. Carteret, Portbail)	Summer charters to Jersey from Frankfurt, Hannover, Dusseldorf, Stuttgart airports.
Profile of visitors to Jersey	Post family 45-64, Families, retired ABC1	Middle aged couples, Families, ABC1	Affluent empty nesters, DINKS, retired, ABC1
Motivations	Scenery, relaxation , culture, heritage	Culture, heritage, scenery, relaxation, shopping	Culture, heritage, scenery, relaxation, walking
Jersey's main competing destinations (as stated in Jersey Tourism Leisure Market profiles)	1 West Country, Cornwall, Devon 2 UK South coast 3 Scotland 4 France 5 Mainland Spain 6 Balearics and other Mediterranean Islands	1 France, especially Brittany 2 Spain 3 Other mainland European Countries (notably Benelux) 4 UK 5 Ireland 6 Guernsey	1 UK 2 France 3 Other mainland European Countries 4 Mediterranean Islands 5 Ireland 6 Guernsey

Figures from Visitor Registration Cards, 2003/4 Exit Survey and Staying Leisure Visitor Surveys 2002-2004

Jersey Tourism Leisure Market Profiles Germany, France and

2.1.1 France Trends:

- Travel market remains strong despite weak economic performance over recent years
- The French are taking increasing numbers of short breaks outside of main summer period (French traditional take their main holidays in August) Bank holiday breaks represent a key opportunity.

- Market to Jersey is dominated by late booking day visits and short breaks. This represents year round potential, particularly during early spring.
- Market is sensitive to economic situation and exchange rates, short-term weather forecast. Perceptions of poor value will deter booking.
- Green tourism ('Tourisme vert'), arts/cultural breaks and activity related breaks increasingly popular.
- Trend toward booking independently. Great potential for selling travel, accommodation and holidays over the internet.

Jersey Tourism Leisure Market Profile France

2.1.2 Germany Trends:

- Remain some of the most prolific holidaymakers in the world and is a valuable market attracted to Jersey for reasons that might lessen the influence of cost.
- Despite difficult economic conditions, trips abroad continue to increase, particularly short breaks. Number of travellers has remained stable but they are taking more trips.
- Jersey is a rather expensive destination for Germans and lack of scheduled, direct low-cost flights inhibits the market.
- Number of 'high spenders' in Germany is increasing, indicating the opportunity to promote a high-quality, upmarket product.
- Increasingly choosing their holiday destination by an activity or special interest. Value for money and the quality of an activity/experience are more and more dominant rather than the destination itself.
- Travel trade continues to play a strong role in Germany. Travel agencies still have an influential role in the choice of holiday destination.
- Internet is very important in terms of information and marketing, but brochures and print media area still very important.
- Perceptions of value for money in Jersey are some of the lowest. Germans are willing to spend considerable amounts of money on products and services, if they feel they represent good value.

Jersey Tourism Leisure Market Profile Germany

2.1.3 Compared to UK?

- German market profile very similar to UK. French market also similar but more families.
- Mirroring UK trends in increasing number of short breaks.

- Value for money is more of an issue for France and Germany, given the relative weakness of the Euro compared to the pound. This is particularly the case for Germany.
- Trend towards increasing internet usage in both countries, although in Germany travel agencies are still important sources of information on holidays.

2.2 Tour Operators to Jersey

2.2.1 Preston Holidays

- Offers Jersey, Guernsey, Alderney, Herm and Sark
- Accommodation only, or flight/ferry inclusive packages are available.

2.2.2 Premier Holidays

- Offers Jersey and Guernsey, Sark, Alderney and Herm
- Operates to wide range of destinations worldwide including Caribbean, Indian Ocean, also Isle of Man

Comparison of Preston and Premier

- Both appear to offer very similar product
- Prices are also similar both for last minute deals and advance bookings.
- Preston's website is easier to use and provides more information on the Channel Islands as they don't offer any other destinations.

	Preston (last minute)	*Preston (advance booking)*	*Premier (last minute)*	*Premier (advance booking)*
3* 7 nights	£295 -£379	£1,234	N/a	£960
3* 2 nights	£229	£628	£229	£552
5* 7 nights	N/a	£1952	N/a	£2016
5* 2 nights	N/a	£986	N/a	£836

Prices for holiday based on 2 adults sharing, departing London Gatwick in mid September (advance booking) or immediate departure (last minute)

2.2.3 Price compared to other destinations

Holiday*	Accommodation	Departure Date	Jersey (Preston)	Brittany (Brittany Ferries)	Costa de Sol (Thomson)
7 night holiday for 2 sharing	4* hotel	September 2006	£1,998	Not available	£925
7 night holiday for 2 sharing	2* hotel	September 2006	£610	£648	£500
3 night holiday for 2 sharing	4* hotel	September 2006	£1098	£429	£552
3 night holiday for 2 sharing	2* hotel	September 2006	£628	£351	£501
7 night holiday for 2 sharing	4* hotel	July 2007	Too early to book	Too early to book	£1008
7 night holiday for 2 sharing	2* hotel	July 2007	Too early to book	£648	£620
7 night holiday for family of 4	Self catering	September 2006	Not available	£456	£832
7 night holiday for family of 4	Self catering	July 2007	Not available	Too early to book	£1582

Source: www.prestonholidays.com, www.brittanyferries.co.uk, www.thomson.com

**includes flight or ferry, for a standard room. Hotel accommodation is bed and breakfast.*

2.3 Jersey Entries in Good Hotel Guide, Good Food Guide, Michelin Stars

- Two Entries in Good Hotel Guide 2006: The Atlantic Hotel (St Brelade), St Brelade's Bay Hotel (St Brelade)
- Four Entries in Good Food Guide 2006: Bistro Soleil (St Peter), Jersey Pottery Garden Restaurant (Gorey Village), Bohemia (St Helier), Longueville Manor (St Saviour)
- Michelin starred – Bohemia (1*)

Comparison with competing destinations.

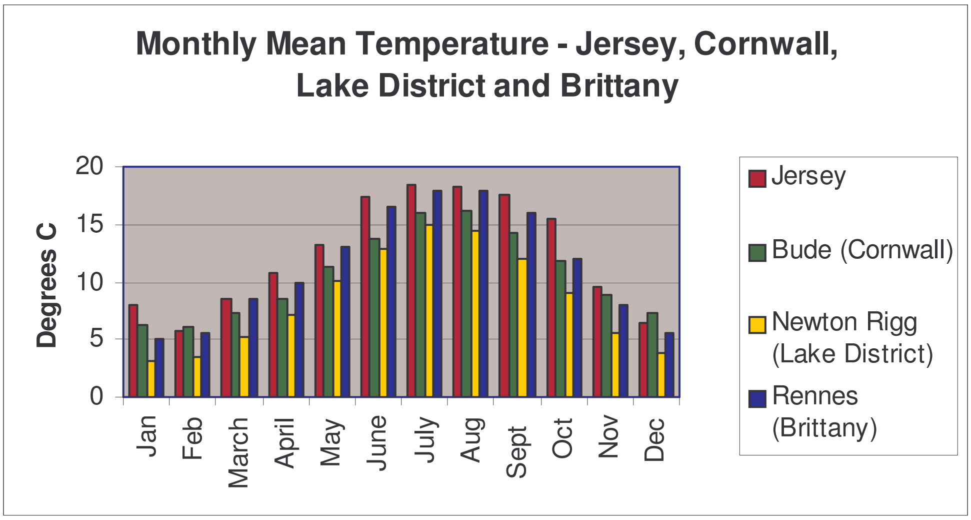
Entries in	Jersey	Cornwall	Lake District
Good Food Guide 2006	4	15	13
Good Hotel Guide 2006	2	25	25
Michelin Recommended (1star)	1	1	3

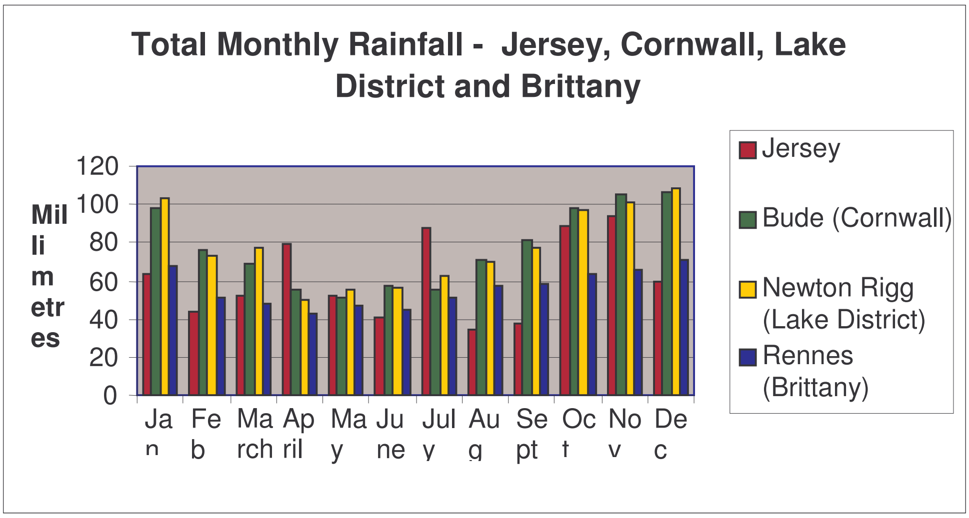
Good Food Guide 2006, Good Hotel Guide 2006, http://www.viamichelin.com

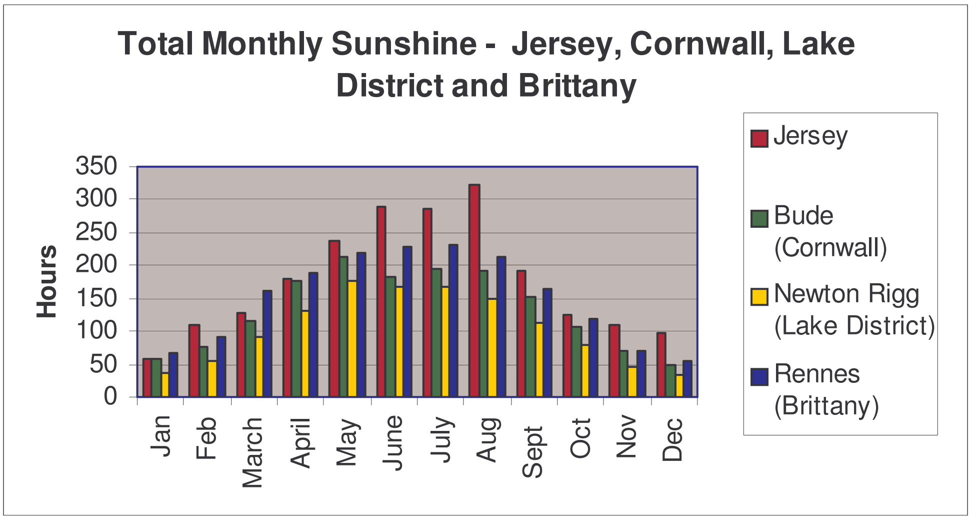
2.4 Jersey's Climate

NB Average figures for Jersey's climate are currently unavailable on the Jersey Met Office website. Therefore Jersey climate statistics for 2005 have been compared against average figures for Cornwall, Lake District and Brittany.

- Jersey is marketed on the basis of being 'officially the sunniest place in the British Isles'. It's is warm, sunny and dry, particularly from May to October.
- Its climate compares favourably to that of competing destinations such as Cornwall, the Lake District and Brittany.
  - It is warmer and sunnier than all three of these destinations, almost all year round.
  - It is also significantly drier than Cornwall and the Lake District throughout the year, with the exceptions of the months of April and July (although this could be due to these being particularly wet months in 2005, figures for 2003, 2002 show much lower figures for these months). It is however, slightly wetter, than Brittany.
- Jersey is a fairly seasonal destination, with temperatures from November through to March under 10 degrees C.







Source

UK Met Office Yearly averages 1971 – 2001

Brittany, Average Climate for Rennes, Climatologie de Cartes

Jersey Met Office, Annual figures for 2005, 30 year averages currently unavailable

2.5 Green Fees - 18 holes for visitors during the summer

The following table shows green fees for a randomly selected group of golf courses to give a feel for the relative cost of Jersey courses.

	Weekday	*Weekend*
Royal Birkdale (Southport)	£150	£175
St Andrews Old Course	£120	£120
Royal Liverpool	£115	Not available
The Belfry – Brabazon Course	£140	£140
The Belfry – PGA National Course	£75	£75
St Andrews New & Jubilee Courses	£57	£57
Royal Jersey	£50	No Access to Visitors
San Roque, Spain	£44	£44
The Belfry – Derby Course	£40	£40
La Moye	£40	£50
Marbella, Spain	£40	£40
The Andrews Eden Course	£34	£34
Les Mielles	£27.50	£30.00
Mullion, Cornwall	£25	£30
Lostwithiel, Cornwall	£26	£30
Duff House, Banffshire	£25	£32
St Andrews Strathtyrum Course	£23	£23
Les Ormes (9 holes) Golf and Leisure Club	£22 (18 holes)	£25 (18 holes)
Jersey Recreation Ground (9 holes)	£12 (9 holes)	£12

	Weekday	*Weekend*
Wheatlands (9 holes, 18 tees)	£18	£20

3. Jersey.com Website Assessment

3.1 First Impressions

- The first listed website from a Google search.
- Chance to choose relevant language from French, Dutch and German.
- Can choose map selection before entering website to see where Jersey is and a focused map of the island.
- Bright and colourful with homepage attractive changing pictures of Jersey on the home page. Obvious side menu and quick links to up coming events, special offers and weather.

3.2 Content

- A large database of places to stay, to eat, transport and to visit each with individual contact details given. Contains all basic information one would want finding out about visiting Jersey.
- Different ways of categorising what one needs such as requesting accommodation to have specific requirements.
- List of specialist tour operators.
- Things to do are also listed in categories such as specific attractions related to a family holiday or a cycling break.
- Interactive map to find the easiest way to travel to Jersey.
- Colour is bright and the choice of photos is appealing.
- Lack of consistency in 'Things to Do' section between Active (which has its own link that emerges immediately) and Fishing, for example, where the link has to be clicked on by the user.
- In the Beach and Views section maybe having a link to a general map to see in reality where the places are.

3.3 Navigation

- Obvious side menu and easy labels and choices to make.
- Easy to find way around and lots of cross references between pages
- To enhance minimum clicking, in 'Attractions' page having a side menu with the list of relevant attractions to save people scrolling down.

- On 'About Jersey' it is very wordy, which won't appeal to all, maybe a separate option of quick bullet points about the island.

3.4 Interactivity

- Offers a feedback section.
- Via this website, can send out requests to tour operators to save separate emails.
- Contact details for tourist centre in Jersey need to be more prominent, such as on each page easily highlighted.

3.5 Functionality

- Has useful site map and search button.
- All works APART from 'Day Trips Off the Island' page needs to be built.

The HOME button needs to be more prominent, at the top rather than at the bottom of each page.

4. Consultees

Mike King, Economic Development

Kevin Lemasney, Economic Development

Julian Green, Jersey Airport

John Vibert, Hotel de France

Gary le Marrec, Tantivy Blue Coach Tours

Peter Le Gresley, Planning and Environment

Chris Evens, Travtel International

Jon Carter, Jersey Heritage Trust

Sean Morvan, Morvan Family Hotels

Paul Simmonds, Jersey War Tunnels

Robyn Lapidus, Jersey Hospitality Association

Rory Lapidus, Hotel de Normandie

Hamish Reid, Jersey Conference Bureau

Kristina Le Feuvre, Amaizin' Maze

Lawrence Huggler, the Huggler Group

Ian Shelton, Grand Hotel

Rafe Woolf, Waterfront Enterprise Board

David de Carteret, Donna Le Marrec, Hilary Grimes, Simon Le Huray and Mike Tait. Jersey Tourism.

Lyndon Farnham, Royal Yacht Hotel

Bill Dolan, Dolan Hotels

Gerald Fletcher, Jersey Hospitality Association

Steve Bailey, Condor Ferries

Paul Luxon, Cimandis

Paul Nichols, Planning and Environment

Catherine Vint, Genuine Jersey

David Seymour, Seymour Group

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