



Visit Jersey Limited 2017 Business Plan Summary

Our Mission

To promote tourism to and within Jersey in an innovative, economic and efficient way thus delivering on our vision of a vibrant sustainable tourism industry.

The ambition is to welcome 1 million visitors spending £500 million by 2030. The Jersey Destination Plan, published in October 2015, sets out our island's tourism ambition to 2020. This Plan covers 2017.

Visit Jersey Priorities

- Inspire visitors from overseas to visit and explore Jersey
- Maximise public investment through partner engagement
- Advise government and the industry on tourism issues, particularly those affecting our competitiveness and productivity

Performance & Measurement

In 2017 VJ will partner with our industry to achieve:

Key Performance Indicators	2020 Target	2019 Target	2018 Target	2017 Target	2016 Target	2015 Actual	2014 Actual	2013 Actual
Gross Value Added for hospitality sector *	Benchmark+ x%	Benchmark+ x%	Benchmark+ x%	Benchmark + x%	Benchmark available early 2017	3.7% £153m	3.8% £149m	3.77% £138m
Productivity Added by hospitality sector **	30	29	29	29	28	28	27	26
Total visitors	800,000 (+2.2%)	782,700 (+2.2%)	765,700 (+2.2%)	749,100 (+2.2%)	732,900 (+2%)	718,000	701,430	681,900
Visitor spend-nominal (2.49% pa 2015-20)	£310m	£294m	£281m	£267m	£255m	£243m	£232m	£230m
Staying leisure visitors total	389,000	380,000	372,000	361,000	352,000	347,000	337,000	325,800
First time holiday visitor	50%	50%	49%	49%	48%	48%	48%	48%
Island RevPAR***	Benchmark+ x%	Benchmark+ x%	Benchmark+ x%	Benchmark + x%	Benchmark available early 2017	na	na	na
Average bed occupancy- August	89%	88%	88%	88%	86%	90%	85%	79%
Net promoter score of visitors	+2%	+2%	+2%	Base + 2%	Benchmark available early 2017	na	na	na

*GVA GVA of “hotels, restaurants & bars”. We do not know the “true” number by means of international benchmarks. Tourism’s impact is more than just economic. Research in 2016 will help improve our understanding of tourism’s impact

** Productivity Hotels, restaurants & bars- GVA per Full Time Equivalent in constant year (2013) values of income; £ thousand

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

In 2017 VJ will deliver:

Visit Jersey Targets	What do we measure	Expected Results
Brand Performance	<ul style="list-style-type: none"> Brand sentiment towards attributes 	<ul style="list-style-type: none"> 2016 Benchmark+ 2%
Marketing Performance	<ul style="list-style-type: none"> Return on investment of 5:1 	<ul style="list-style-type: none"> ROI on marketing spend 76,000 incremental visits 267,000 incremental bed nights
Activity Performance	<ul style="list-style-type: none"> Visitor traffic Data captured Content engagement 	<ul style="list-style-type: none"> Unique visitor traffic: 1.5 million visitors Data capture: +40,000 names Social audience: +100,000
Trade Conversion (including Events Jersey)	<ul style="list-style-type: none"> Industry referral leads generated industry satisfaction 	<ul style="list-style-type: none"> Partner referrals: 133,000 Partner satisfaction survey: 2016 benchmark +2%

Target Segments

UK

Retain 1	Retain 2
<ul style="list-style-type: none"> 55+ Retired / working 2+ holidays a year 3-6+ month lead time Package driven 60 miles from departure points ABC1 	<ul style="list-style-type: none"> 25-54 Working 1+ holidays a year 3-6+ month lead time Package driven 60 miles from departure point ABC1C2
Convert 1	Convert 2
<ul style="list-style-type: none"> 25-54 No children 2+ holidays a year 4-6-week lead time Working Independent traveller 60 miles from departure points ABC1 	<ul style="list-style-type: none"> 25-54 Children 2+ holidays a year 4-6-week lead time Working Independent traveller 60 miles from departure points ABC1

France

Day-tripper	Short stay
<ul style="list-style-type: none"> 25-54 (or groups) Children 2+ holidays a year Holidaying in the region Working Independent traveller ABC1 	<ul style="list-style-type: none"> 25-54 no Children 2+ holidays a year West/North West France Working Independent traveller ABC1

German speaking countries

Retain & Grow	Convert
<ul style="list-style-type: none">• 55+• Retired / working• 2+ holidays a year• 3-6+ month lead time• Package driven• 60 miles from departure points• ABC1	<ul style="list-style-type: none">• 25-54• no Children• 2+ holidays a year• 60 miles from departure points• Working• Independent traveller• ABC1

Other Countries

Scandinavia potentially offers growth opportunities. In 2017 VJ will work with the Ports of Jersey and suppliers to bring interested parties together to better understand the nature of potential demand and ensure Jersey's Scandinavia proposition is clearly defined and consistently presented. Elsewhere VJ will retain a mostly "watching brief".

VJ's Contribution

Tourism is central to government's plans to stimulate economic growth, sustain and create jobs and provide some balance to Jersey's economy. The States Enterprise Strategy priorities are:

Enterprise Strategy Priority 1 - Improve the productivity of existing businesses

Enterprise Strategy Priority 2 - Support local companies with high growth potential

Enterprise Strategy Priority 3 - Support the creation of new high-value businesses

VJ, in partnership with Jersey Business, Locate Jersey and Digital Jersey, has agreed a collaborative approach and VJ's key role is to develop the visitor economy.

VJ is the marketing body for the Island as a destination. But we are more than this; our research and analysis will better inform our partners and better support their marketing efforts. We will attract private sector investment; both cash and marketing-in-kind to extend the marketing of Jersey. These partnerships can also deliver economies of scale which will reduce the costs for our partners and save public money. Our efforts also help sustain and build a sense of place. This can buttress the work of other external facing States organisations by helping make Jersey a better place to visit, do business with, study in and locate to. We have individual plans for:

- Research
- Product development
- Business visits and events
- Market development
- Marketing
- Visitor information servicing

In 2017 VJ will:

- Continue to roll out #theislandbreak Jersey brand
- Promote Jersey as an all year holiday destination
- Work with industry partners, government and their agencies, to develop the Jersey product, increase productivity and attract incremental growth in visitor numbers and spend
- Provide leadership for business visits and events-led tourism
- Ensure the successful Introduction of a new What's On guide and Map
- Raise the profile of tourism; provide insights and leadership for the industry on policy matters
- Champion the Economic Impact Study
- Support businesses raise their productivity and improve performance

2017 Budget

Total Grant	£5,100,000
Total Staff Costs	£995,000
Research & intelligence	£360,000
Product	£220,000
Marketing	£2,360,000
Trade Development incl. co-operatives	£550,000
Tourist Information Centre	£250,000
Events Jersey	£200,000
Total Premises Costs	£55,000
Total Administrative Expenses	£110,000
Operating Expenses	£5,100,000

NB

- i) Total income of £5.1m is £4.9m VJ grant, £0.2m Events Jersey grant*
- ii) Total staff costs include executive team remuneration and board members' fees*
- iii) Marketing spend is net of partners' financial contributions*

Organisational Structure

