

Visit Jersey Limited Business Plan 2020-23



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1. Our Business

By 2030 we have an ambition to grow the Jersey visitor economy to 1 million visitors spending £500m per annum.

This stretching ambition was first described in the 2015 Jersey Destination Plan. In January 2019 the JDP was refreshed and revised setting out priorities and activities for Government, industry and Visit Jersey. Over the shorter period to 2020, the JDP performance target is 748,000 visitors spending £265m. This Business Plan describes actions that aim to exceed these 2020 targets. Visit Jersey also works to ensure our industry's contribution to the Island community is recognized beyond its fiscal impact.

Visit Jersey **directly** impacts on the visitor economy through our own initiatives and **indirectly** by advising and influencing third party organisations.

Any plan can only be a guide to future actions. At the time of writing 1) it is still uncertain how Brexit will play out, 2) discussions are advancing between the Government of Jersey and the rights owners and media organisations regarding a possible Bergerac TV series in 2020/21, 3) hospitality businesses are increasingly facing severe staff shortages which is impacting opening times and service levels, and 4) over the next few years both sea and air connectivity might change as Condor ownership and the Flybe consortium work their way through. This Plan sets our Visit Jersey's agenda, but we will stay agile and capable of redirecting our resources and efforts to respond to changing circumstances. This Plan is predicated on a £4.9 million investment from the Jersey Government.

Strategic Priorities 2020-2023

In 2020, Visit Jersey forecasts 758,000 visitors (up 2.2%) spending £282 million (up 2.5%)

Visit Jersey Priorities

The Proposed Government Plan 2020-23, published at the end of July 2019, sets out the strategic priorities of the Council of Ministers. This Plan seeks to support this ambition (see appendix 1).

A survey of stakeholders (July 2019) confirmed that our overwhelming priority should be to “inspire visitors to visit and explore Jersey”. The consultation also signalled a desire for Visit Jersey to evolve its marketing; be bolder but that a complete re-start or revolution was not required. On-island, stakeholders asked for 1) more consistent tourism messaging for local audiences and 2) strengthening alignment with other organisations such as the Ports of Jersey, Jersey Hospitality Association and other Arm's Length Bodies. Visit Jersey priorities during 2020-2023 are to:

- 1) Inspire visitors from overseas to visit and explore Jersey
- 2) Improve productivity of tourism assets by broadening seasonality
- 3) Maximise public investment through partner engagement
- 4) Advise government and the industry on tourism issues- particularly those affecting competitiveness.

In meeting these priorities, we will ensure there is the right balance between marketing the Island as a tourist destination and local engagement.

2020 Corporate Priorities

1 Create & deliver market plans	<ul style="list-style-type: none">• develop market segment plans• build awareness and drive conversion• align market facing (marketing-product-trade) activity in a single 2020 deliver plan
2 Build on-island engagement	<ul style="list-style-type: none">• make a bigger impact on behalf of the visitor economy• leverage public support to help secure visitor targets• Tourism Information Centre to provide excellent welcome and information services
3 Develop organisational capability	<ul style="list-style-type: none">• implement the Comptroller & Auditor General's recommendations• staff have personal targets and development plans• implement the recommendations from the 2019 IT review• plan for staff succession
4 Review & develop marketing resources	<ul style="list-style-type: none">• improve digital assets (web, search, CRM and content marketing)• improve reporting capabilities for internal and external audiences
5 Champion productivity & competitiveness	<ul style="list-style-type: none">• build year-round visitation• encourage sustainable tourism• harness "sharing economy" (e.g.Airbnb) opportunities

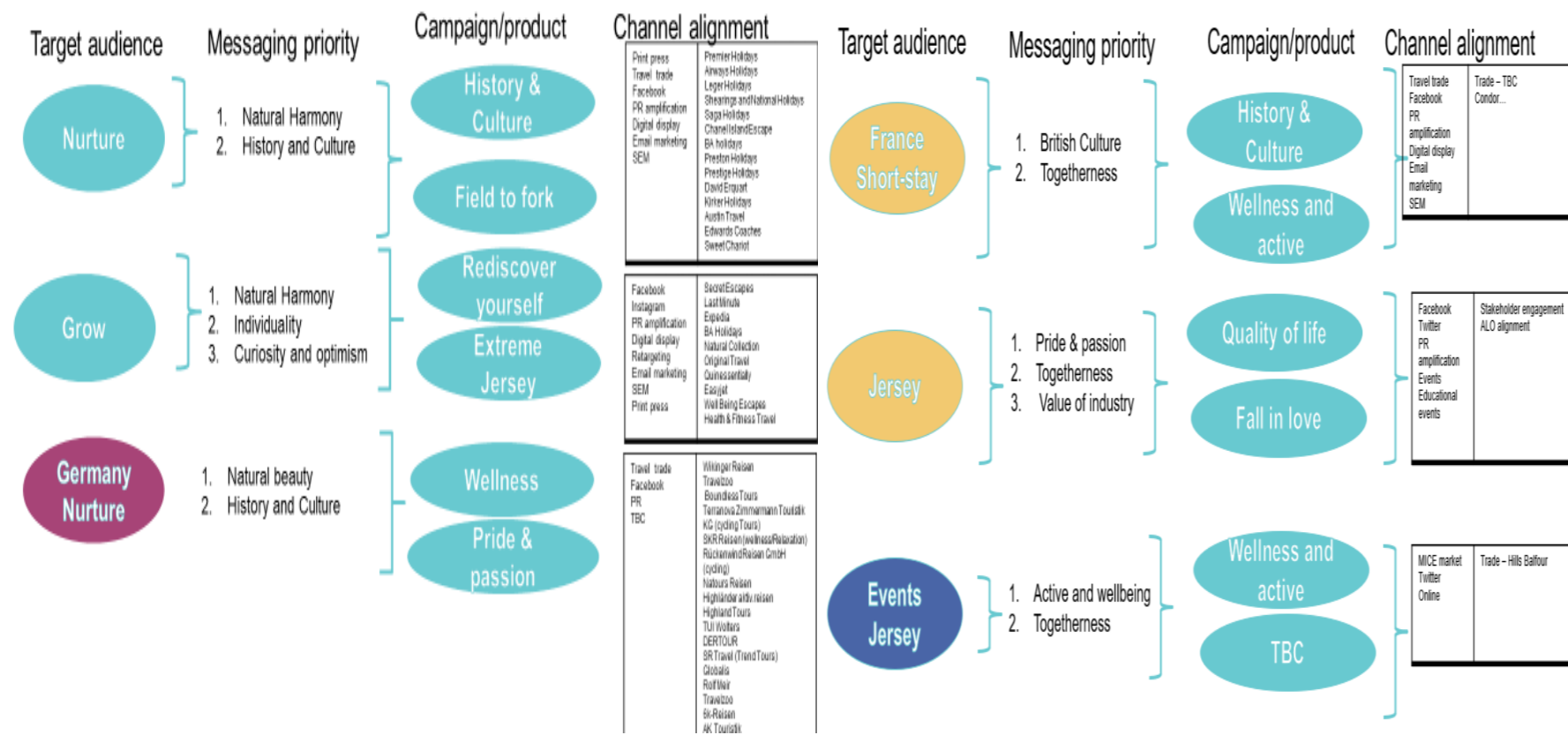
2. Corporate Priorities and Market Plans

In 2018:

- UK visitors represented 73% of visitor spend 76% of visitor nights
- French visitors represented 8% of spend 7% of nights
- German visitors accounted for 5% of spend 4% of nights
- Guernsey visitors represented 5% of spend 3% of nights
- Other countries include Ireland, Netherlands, Switzerland, but generally none exceed 1% of total


A graphical representation of Jersey's markets and segments can be viewed in appendix 2.


During 2020 to 2023 Visit Jersey will work hard to protect existing source markets and be ambitious in seeking to grow new routes and opportunities. Visit Jersey will focus on the following audiences:




Market Plans

1 Create & deliver market plans


Market & Segment	2020 Plan	Outputs	Outcomes
UK Nurture 	<ul style="list-style-type: none"> Continue to create and deliver the island break to support the summer season visitor market Work with the travel trade to improve connectivity, conversion and saleability of Jersey tourism products Work with partners to develop great summer experiences for our visitors 	<ul style="list-style-type: none"> Create and deliver a 2020 heritage and history themed campaign that will also embrace Liberation 75 Share the campaign through 1) Visit Jersey owned channels (direct influence) and 2) third party channels, especially travel firms (indirect influence) Deliver across the visitor life cycle from inspiration to advocacy and provide leads for our partners Suppliers develop new experiences 	<ul style="list-style-type: none"> Deliver a ROI of 6:1 on marketing investment Supplier satisfaction survey score of 73% Trade satisfaction survey scores of 79%

Market & Segment	2020 Plan	Outputs	Outcomes
UK Grow 	<ul style="list-style-type: none"> Continue to create and deliver the island break to support year-round travel Work with the travel trade to improve connectivity, conversion and saleability of Jersey tourism products Work with partners to develop great seasonal experiences for our visitors 	<ul style="list-style-type: none"> Create and deliver an annual short breaks campaign with seasonal adaptations Agree and deliver a carrier-partnered campaign which supports year-round short break visitation Deliver a communication programme that is relevant and bold Deliver across the visitor life cycle from inspiration to advocacy 	<ul style="list-style-type: none"> Deliver a ROI of 6:1 on marketing investment Position Jersey as a fun and welcoming destination full of immersive experiences Supplier satisfaction survey score of 73% Trade satisfaction survey scores of 79%

Market & Segment	2020 Plan	Outputs	Outcomes
France Short Stay 	<ul style="list-style-type: none"> Improve the saleability of Jersey tourism products Work to open a new air route between the Channel Islands and France 	<ul style="list-style-type: none"> Work with Condor, the French travel trade, the Transmarche Development Group and possibly Manche Iles Express and Bureau des îles-Anglo-Normandes (BIAN) to develop the short- 	<ul style="list-style-type: none"> Increase in staying French visitor numbers New route to France (note this may fall into 2021)

		<p>break market around the shoulder months with a focus on penetrating the greater Paris region</p> <ul style="list-style-type: none"> • Develop itineraries which can be offered through third part trade and jersey.com/fr and consider Paris packages tied to TGV rail through St Malo • Work with Condor to target Western France tour operators and travel agents (ANATOL) to build awareness of Jersey • In partnership with Rennes Airport, POJ, Chamber of Commerce and carrier(s) support the business case for a new Rennes route 	
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Market & Segment	2020 Plan	Outputs	Outcomes
German speaking countries 	<ul style="list-style-type: none"> • Work with the German representative agency (following retender in October 2019) to develop a new plan for Germany • Focus on travel trade co-operative partnerships as the key route to market • Work with trade partners to improve distribution of Jersey in German speaking countries to push more Jersey inventory through travel distribution channels • Protect current charter routes and 2020 summer charter seat numbers 	<ul style="list-style-type: none"> • Test Jersey brand proposition for Germany • Manage our German agency to extend brand Jersey into Germany, nurturing existing partnerships and identify, court and capture new sources of visitors via traditional and niche specialised tour operators, OTAs, and carriers • Extend the start and/or end of the charter dutations • Oversee the travel trade “Market Development Challenge Fund” and “Risk Share” agreements with European operators • Stimulate new source origination airports 	<ul style="list-style-type: none"> • Travel Trade satisfaction survey score of 79% • Increase product inclusion in their programmes • Increased shoulder season visitor numbers


Market & Segment	2020 Plan	Outputs	Outcomes
All Markets 	<ul style="list-style-type: none"> • Work with Ports of Jersey to formulate a long-term plan to sustain and grow access to Jersey (<i>also see below- Visit Jersey’s “Route Development Marketing Project” included in the Proposed Government Plan 2020-23, page 12 below</i>) 	<ul style="list-style-type: none"> • Develop a routes strategic plan 	<ul style="list-style-type: none"> • Key routes retained and growth in seat numbers servicing Jersey year-round (1-10-year time horizon) • New routes (beyond 2020)

	<ul style="list-style-type: none"> Work with island suppliers to showcase all that is great about Jersey 	<ul style="list-style-type: none"> Host Destination Jersey in April 2020 	<ul style="list-style-type: none"> Holiday Visitor Approval Score (NPS) of 56 Supplier satisfaction survey score of 73% Trade satisfaction survey scores of 79%
Research	<ul style="list-style-type: none"> Continue to provide the organisation and stakeholders with research expertise to aid decision making 	<ul style="list-style-type: none"> Provide ad-hoc research advice and manage projects to support the development of our marketing activity, our website, and the delivery of visitor information services 	<ul style="list-style-type: none"> Successful completion of research projects that contribute to improved decision making by Visit Jersey and third parties
Marketing	<ul style="list-style-type: none"> Remain agile to emerging opportunities such as the outcome of Brexit 	<ul style="list-style-type: none"> Tactically intervene targeting both the UK and Europe spelling out the benefits of post-Brexit holidaying in Jersey. Support with good value offers 	<ul style="list-style-type: none"> ROI of 6:1
Trade & Product	<ul style="list-style-type: none"> Identify trends and new opportunities and push more Jersey inventory through travel distribution channels Harness trade shows and exhibitions to promote Jersey Be alert to niche product opportunities to fill product gaps that respond to customer needs 	<ul style="list-style-type: none"> Manage Hills Balfour (travel trade representative agency based in London) to nurturing existing partnerships and identify, court and capture new sources of visitors via traditional and niche specialised tour operators, OTAs, and carriers Identify and initiate trade promotion opportunities (e.g. ITB, WTM, sector-seminars) to push Jersey as a visitor destination. This may be solo or in partnership with others such as Visit Guernsey and/or trade partners 	<ul style="list-style-type: none"> Supplier Partner satisfaction survey score of 73% Increase in trade partners promoting Jersey
Product	<ul style="list-style-type: none"> Encourage inter-island visitation Celebrate Liberation 75 by chronicling and championing the island's characters and stories and leave behind a tourism legacy 	<ul style="list-style-type: none"> Develop a suite of day itineraries suitable for day visitors, for instance from Guernsey, and distribute through Visit Jersey and Condor channels create a set of tools for island tourism suppliers and trade partners to help them leverage opportunities 	<ul style="list-style-type: none"> Holiday Visitor Approval Score (NPS) of 56 Increase in Guernsey visitor numbers and spend

Events & MICE	2020 Plan	Outputs	Outcomes
	<ul style="list-style-type: none"> Drive visitation and spend in the shoulder months. 	<ul style="list-style-type: none"> Administer the Events Jersey Steering Group including participation from sister organisations (e.g. Sports Jersey, Jersey Business) 	<ul style="list-style-type: none"> ROI of 6:1 on events investment Growth in number of shoulder months events

		<ul style="list-style-type: none"> • Maintain an Events Jersey/MICE website • Manage Hills Balfour (London-based MICE agency) to promote Jersey to off-island event organisers and generate leads that are aligned with the Events strategy • Support existing events that offer growth opportunities; where appropriate include marketing and communication activities to support • Administer an Events Incubation Fund to nurture new events with the potential to grow visitor numbers • Support the 2020 Super League Triathlon, subject to 2019 KPI achievement and set aside £100,000 in 2020 to support the staging and promotion of the event • Maintain an Asset Register accessible to event organisers • Champion November to January tourism opportunities 	<ul style="list-style-type: none"> • More targeted approach to event bidding • Long-term (3 years+) uplift in demand to host MICE in Jersey • SLT results exceed 2019 scores • Submit a three-year business case to EDTSC, supported by stakeholders, setting out event ideas and the case for funding
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2 Build on-island engagement

Market & Segment	2020 Plan	Outputs	Outcomes
Jersey (on-island) 	<ul style="list-style-type: none"> • Help visitors get more from their stay in Jersey 	<ul style="list-style-type: none"> • An on-island information service- in partnership with Liberty Bus- that manages and delivers information on-island throughout the year delivered to excellent standards • Quarterly management meetings and product training to maintain and improve service levels • Publish “What’s On” Guide and “Official Map” • Evaluate the existing Liberty Bus contract for the provision of TIC services ahead of the contract expiring April 2021 	<ul style="list-style-type: none"> • Annual Tourism Information Centre (TIC) satisfaction survey score of 79% • Holiday Visitor Approval Score (NPS) of 56 • Periodic mystery shopping (to also provide feedback and help with staff development)
	<ul style="list-style-type: none"> • Align our product work to the Island break promise 	<ul style="list-style-type: none"> • Package up additional ‘Signature Experiences’ with the support of our suppliers 	<ul style="list-style-type: none"> • Suppliers agree to include in their programmes and products • Increased product inclusion

	<ul style="list-style-type: none"> • Provide travel industry insight to maximise product distribution opportunities 	<ul style="list-style-type: none"> • Identify best matched travel trade partners for on-island suppliers, facilitate introductions, support programme development 	<ul style="list-style-type: none"> • Increased low season visitors
	<ul style="list-style-type: none"> • Provide insights to internal audiences, industry partners and the Government • Be a trusted adviser to policymakers in Jersey 	<ul style="list-style-type: none"> • The following continuous surveys and research activities will be produced throughout 2020: <ul style="list-style-type: none"> ○ Exit Survey, in partnership with the Statistics Jersey ○ Brand Tracker ○ STR Accommodation Reporting ○ Jersey Attractions Benchmark Survey ○ Forward Booking Survey • Ad-hoc research to support business objectives 	<ul style="list-style-type: none"> • Supplier satisfaction survey score of 73% • Trade satisfaction survey scores of 79%
	<ul style="list-style-type: none"> • Manage an evaluation programme to ensure that Visit Jersey evaluates major marketing campaigns, our 'always on' consumer-facing activity, our trade interventions and the performance of the Jersey brand 	<ul style="list-style-type: none"> • A series of evaluation studies 	<ul style="list-style-type: none"> • Completed evaluation studies reported and summarised in the 2021 Annual Report • Supplier satisfaction survey score of 73% • Trade satisfaction survey scores of 79%
	<ul style="list-style-type: none"> • Help Jersey fall in love with tourism 	<ul style="list-style-type: none"> • Generate awareness and encourage local engagement for the visitor economy by leverage the visiting friends and family (VFR) opportunity which aligns with the Government Plan; in 2020 a key focus will be on the Big Weekend and Zest Festival- in partnership with the JHA • Stakeholder comms plan created and implemented (key engagement opportunities and core messaging) 	<ul style="list-style-type: none"> • Big Weekend feedback leads to a BW 2021 proposal • Supplier satisfaction survey score of 73%

3 Develop organisational capability

	2020 Plan	Outputs	Outcomes
	<ul style="list-style-type: none"> • Safeguard the organisation's structure and strategy to deliver business objectives in both the short and long term 	<ul style="list-style-type: none"> • Implement the C&AG's 16 recommendations 	<ul style="list-style-type: none"> • Successful Public Accounts Committee review of progress in early 2020

		<ul style="list-style-type: none"> • Regularly consult with other Arms-Length Bodies and government to ensure policies and operating practices suitable • Implement the recommendations of the 2019 IT review; ensure the business remains resilient, agile and efficient • Maintain team effectiveness during a period of staff absences due to pregnancies • Maintain a GDPR compliant and cyber-secure business • Build the talent and skills of staff to include personal development plans • Equip staff to understand and deliver a project approach to working • Grant annual spend pattern broadly in line with budget • Develop our management information and KPI reporting 	<ul style="list-style-type: none"> • IT call outs below 2019 levels • 2020 Culture Club survey shows improvement on the 3.2 2019 score • Quarterly submissions to EDTSC all successfully signed-off • Publish 2020 Financial Statements and Annual Report with no adverse comments (in Spring 2021) • Staff training and development to support personal and corporate objectives
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4 Review & develop marketing resources

	2020 Plan	Outputs	Outcomes
	<ul style="list-style-type: none"> • Build digital marketing platforms 	<ul style="list-style-type: none"> • Manage tender for jersey.com and launch refreshed/new site to include improved 1) user generated content, 2) third party signposting and 3) social media engagement in early 2021 • Improvements to be across all language sites 	<ul style="list-style-type: none"> • Improved website launched on time and within budget • Mix of analytics (tbc during tendering process) but likely to include visits to digital platforms, heightened engagement, and more effective lead generation to third parties

5 Champion productivity & competitiveness

2020 Plan	Outputs	Outcomes
<ul style="list-style-type: none"> Build year-round visitation by: <ul style="list-style-type: none"> supporting business and individuals seeking to develop tourism products and services championing the sharing economy (e.g. Airbnb) 	<ul style="list-style-type: none"> Provide guidance and support (e.g. planning letter) for third parties for their business projects as appropriate Demonstrate why Jersey should legislate and embrace Airbnb showing that it represents a significant self-catering option, supported by the local population, and linked to our Jersey signature experiences 	<ul style="list-style-type: none"> Planning consent obtained for supported third party planning applications Following legislation, Airbnb included in marketing activities (2021-2023)
<ul style="list-style-type: none"> Align our product work to the Island break promise 	<ul style="list-style-type: none"> Lead the Product Action Group which seeks continuous productivity improvements of tourism assets to help strengthen competitiveness Update the supplier partnership programme Develop day itineraries suitable for Guernsey/French day visitors working with Condor 	<ul style="list-style-type: none"> Supplier satisfaction survey score of 73% Additional Jersey products developed by suppliers New products featured in tour operators' programmes
<ul style="list-style-type: none"> Encourage sustainable tourism 	<ul style="list-style-type: none"> Advance a tourism agenda, in consultation with stakeholders, setting out how Visit Jersey and the industry can contribute to achieving Government's carbon neutral status by 2030 	<ul style="list-style-type: none"> Long term outcomes that move the island's tourism offer to a more sustainable basis
<ul style="list-style-type: none"> Build Up the skills and talent of those working in the visitor economy 	<ul style="list-style-type: none"> Partner with JHA/education/training suppliers to positively influence the resident population's required tourism skillset 	<ul style="list-style-type: none"> Support JHA outcomes
<ul style="list-style-type: none"> Evolve the Exit Survey to deliver incremental benefits for Visit Jersey and stakeholders 	<ul style="list-style-type: none"> Move the Exit Survey administration to Stats Jersey starting January 2020 Strengthen messaging to key media outlets and audiences 	<ul style="list-style-type: none"> Timely periodic publication of visitor data with accompanying commentary (first 2020 report for the January- March period)

Separate from this Business Plan, Visit Jersey submitted a proposal under the heading "Promoting Jersey" for a Route Development Marketing Project which is included in the Proposed Government Plan 2020-23 as "Financial support to Visit Jersey for route marketing (from 2020) and promotion of short breaks (from 2021), through a sustained multi-year marketing initiative, increasing demand across the hospitality sector outside high season". The indicative funding under the Government Plan is: 2020 £250,000 2021 £850,000 2022 £850,000 2023 £850,000.

3. 2020 Measurement

Jersey's Visitor Economy Forecast

Visit Jersey seeks to influence

The overall performance of the Jersey visitor economy will be judged by the key performance indicators below (KPIs). It is important to understand that Visit Jersey is not accountable for achieving the visitor economy forecast- this is a joint enterprise. These KPIs are shared amongst all involved in the visitor economy.

Visit Jersey Priorities

Visit Jersey is accountable

Visit Jersey through its investment in marketing, trade, product initiatives and staff aims to deliver measurable outcomes detailed in the grid below.

2019 forecasts will be updated as information becomes available.

2020 Priorities	Measure	Measurement Method	Baseline (2019) Forecast/Target (until confirmed)	2020 Forecast/Target	Jersey Destination Plan 2020 targets	2020 year-to-date result
1 Create & deliver market plans	Total visitors	Exit Survey	741,000 (+2.2%)	758,000 (+2.2%)	748,000	
	Visitor spend-nominal	Exit Survey	£274.7m (+2.5%)	£282m (+2.5%)	£265m	
	Overnight Holiday Visitors	Exit Survey	425,000 (+2.5%)	438,000 (+3%)	438,000	
	Holiday visitors' total bednights	Exit Survey	1.91m (+2.5%)	1.96m (+2.5%)		
	First time holiday visitors	Exit Survey	49% (+1)	50% (+1%)		
	Holiday Visitor Approval Score (Net Promoter Score)	Exit Survey	56 (+1)	56	48	
2 Build on-island engagement	Marketing: ROI on grant	Campaign evaluation	6:1	6:1		
	Travel Trade satisfaction with VJ	Stakeholder survey	78% (+1%)	79% (+1%)		
	On- island Information Provision	Visitor satisfaction survey	78% (+1%)	79% (+1%)		
3 Develop organization capability	Marketing in kind contribution to VJ	MIK account	£35,000	£38,000 (+10%)		
	Staff turnover	HR records	13%	<13%		
4 Review marketing resources	Staff motivation	Culture Club survey	3	3.3 (+10%)		
	Marketing KPIs from new website	DOMO	No benchmark	Create benchmarks		
5 Productivity & competitiveness	Seasonal spread	Exit Survey	23%	23.5% (+0.5%)		
	Island RevPAR	STR survey	£75 (+2%)	£76 (+£1)		
	On-island supplier satisfaction with VJ	Stakeholder survey	72%	73% (+1%)		

This Business Plan itemizes high level targets (above) to help gauge performance. These will be agreed with the Government and sit within the 2020 Partnership Agreement between Government and Visit Jersey. Beneath this Business Plan is a 2020 Project Plan detailing integrated marketing, product, trade actions for:

1. UK Nurture
2. UK Grow
3. Germany Nurture
4. France Short stay
5. Events Jersey
6. All markets
7. On-island

More granular targets are in place to judge performance of these 7 plans including marketing metrics such as web visits, dwell time, engagement levels, incremental visitor numbers, spend and nights.

4. 2020 Budget

Indicative

	UK	France	Germany	All Markets	Jersey	Total £
Programme Budget						
Research & intelligence	-		-	-	300,000	300,000
Product				95,000		95,000
Marketing	1,719,000	242,000	55,000			2,016,000
Trade incl. co-operatives	511,000		177,000			688,000
Tourism Information Centre	-		-	-	280,000	280,000
Events Jersey				150,000		150,000
Infrastructure Budget						
Market Facing & Research Staff cost					789,000	789,000
Other Staff & Board Costs					273,000	273,000
Premises Costs	-	-	-	-	62,000	62,000
Total Administrative Expenses & Depreciation	-	-	-	-	247,000	247,000
Total Grant	2,067,000	210,000	200,000	320,000	2,103,000	4,900,000

Assumptions

1 grant income is £4.9m

2 net of any partner financial or marketing-in-kind contributions

Risk Management

A comprehensive risk register is maintained. It is reviewed by the Audit Committee and approved at all VJ board meetings. There are four groupings of risks; strategic, reputational, operational and external. Each risk has an owner and a mitigation plan to manage the risk. Appendix 3 lists 2020 assumptions used to construct this Business Plan.

Key Positive Risks

- Brexit could and should also be viewed positively relating to demand. As a sterling-based destination, Jersey has a distinct advantage over our Euro-based competitors in the UK market and Jersey could enter consideration for those who will undoubtedly be questioning their usual choice of Euro-based holiday destination for short breaks and longer holidays. The pound will also be cheaper for residents in the Euro-zone helping Jersey's cost-competitiveness.

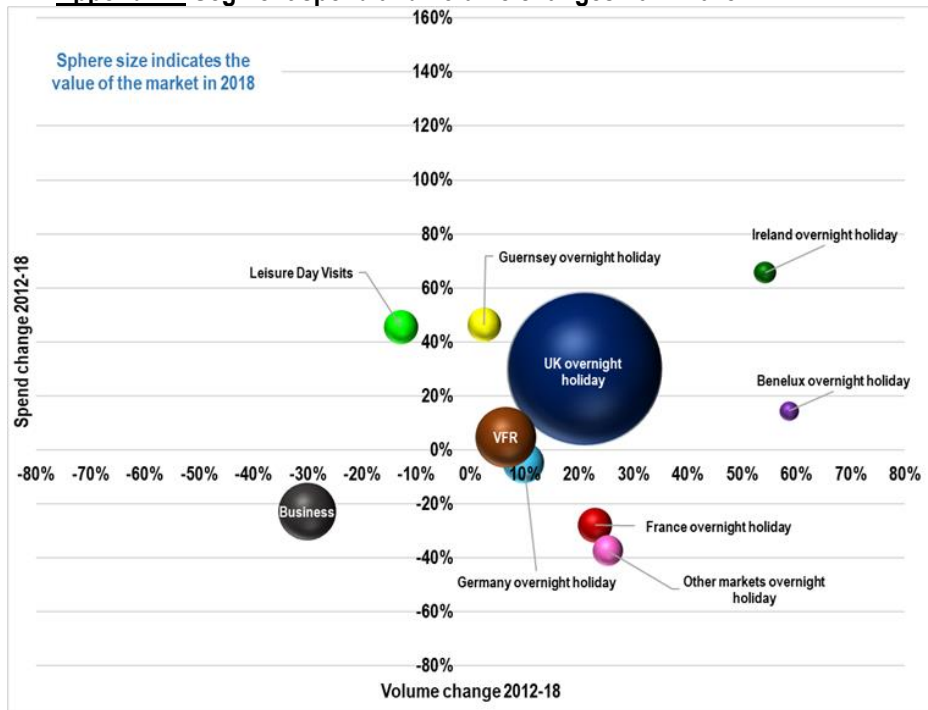
Key Negative Risks

- Sustained weather-related disruption or technical problems to Jersey's connectivity during high-demand periods of the year
- Insufficient staff available for businesses which impact on service delivery
- Hard Brexit stops or delays European visitors and staff
- Major carrier's financial performance worsens leading to changes in their route network
- A sharp deterioration in the UK economy brought about by Brexit, consumer indebtedness and rising interest rates

Appendix 1 Council of Ministers strategic priorities and how the visitor economy contributes to Government's priorities

Council of Ministers strategic priorities	How the visitor economy contributes to Government's priorities
Put children first	<ul style="list-style-type: none"> Events can inspire children to enjoy healthy and learning lifestyles, e.g. Kids Fun Run at the Super League Triathlon, Children's reading events during the Festival of Words- can all help with children's mental development, health and wellbeing
Improve Islanders' wellbeing and mental and physical health	<ul style="list-style-type: none"> Supports mental wellbeing of citizens who participate in activities and spectate at sports events (alongside visitors) Visitors represent around 60% of all passenger movements thereby supporting routes to allow residents to enjoy travel as part of a healthy lifestyle. Connected by sea from two UK ports, three French ports and from Guernsey and Sark; 23 UK airports, and Dublin Tourists spend on and support Jersey's culture- Jersey Opera House, Arts Centre, museums, castles and galleries, Zoo as well as supporting major community events like Battle of Flowers Tourism fosters a sense of place- citizens feel proud of their island
Create a sustainable, vibrant economy and skilled local workforce for the future	<ul style="list-style-type: none"> Tourism spending supported 8.5% of GVA and 11.5% of all employment in Jersey (Tourism Economics 2019 report) Tourism provides diversity to our economy and is synergistic with financial services and other key sectors thereby increasing sustainability. There are also opportunities for productivity improvement by reducing seasonality
Reduce income inequality and improve the standard of living	<ul style="list-style-type: none"> Helps with social inclusion- tourism jobs across all salary levels for all ages with excellent career growth opportunities Visitors explore and spend in all 12 parishes. 23% of holiday visitors go to the North East of the Island (Jersey Zoo), 16% head to Gorey in the East and a similar proportion to Jersey Pearl in the North West
Protect and value our environment.	<ul style="list-style-type: none"> Tourism helps our rural economy and respects landscapes. Visitors help sustain the livelihoods of Jersey's farmers and fishermen and value our natural beauty Tourism supports and helps sustain Jersey's heritage such as Durrell and Jersey Heritage

Appendix 2 Segment spend and volume changes 2012-2018



Appendix 3 2020 Assumptions

This plan assumes there will be no material change to the environment in which Visit Jersey operates that underpins growth in total visits of 2.2% or higher in 2020.

Other key assumptions include:

- No change to carrier mix and capacity
- Accommodation availability constrained in Summer otherwise meets demand
- Sterling remains volatile
- Brexit- political and economic uncertainty may affect business confidence and travel
- Brexit may negatively impact the supply of labour
- Sterling-denominated competitor destinations likely to invest in marketing to take advantage of value-drive staycation opportunity
- No change in 2020 to Jersey government fiscal and population policies ahead of the island Plan discussions
- No change in UK Air Passenger Duty
- Jersey remains an attractive visitor destination.