

Visit Jersey Limited

Business Plan 2021

***Please note:** this Business Plan has been produced during the Covid-19 pandemic, during significant uncertainty, particularly in the travel and hospitality industry. As such, the Business Plan has been produced providing details of likely activity for 2021, but further insight, analysis and refinement will be required to adapt to the ever-changing economic environment. Once we have more clarity on the access and industry landscape in 2021 and beyond, we will be able to provide more detailed forecasts and KPIs.*

Contents

Forward: A Road to Recovery

The Importance of Tourism

Strategic Business Plan 2020 – 2023

- Visit Jersey's Purpose and Approach
- 2021 Corporate Priorities
- 2021 Budget
- 2021 Measurement

Appendices

1. 2021 Corporate Priority Activity
2. Risk Management
3. Council of Ministers Strategic Priorities
4. New KPI Evaluation

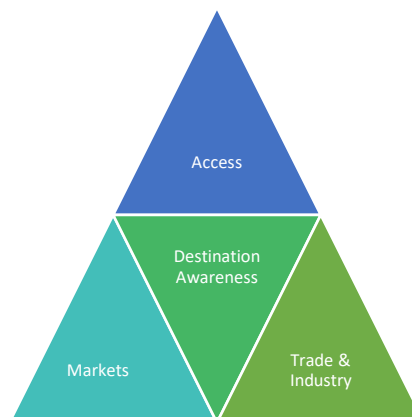
A Road to Recovery

2020 has been the worst year in tourism for Jersey since the Occupation.

How long the pandemic will last and affect our island's economy, businesses and people remains unknown, but as we look forward to 2021 and beyond the immediate challenges that we need to navigate, there are many opportunities we can realise over the next 3-5 year horizon.

Forecasting specific visitor numbers and revenue targets for next year will depend on how the PCR testing at the borders plays-out; how access and connectivity recovers; the economic impact from our source markets; and how the industry landscape evolves, but there are already promising signs that Jersey can take advantage of the change in tourist behaviours and demands, particularly from our core market in the UK.

Our strategy next year is simple: to focus on the key drivers of growth.



We will achieve this by:

- Working closely with our partners, such as Ports of Jersey, to support the recovery of access to Jersey through co-operative marketing with carrier partnership programmes.
- Focus on the markets and customer segments which will deliver the quickest and greatest number of holiday bookings to Jersey.
- Develop more opportunities working with the trade.
- Support our industry with opportunities to work with us on our campaigns.
- Use PR and advertising to raise awareness of Jersey so that when travellers are ready to book holidays again, Jersey is front of mind.

2021 will be a key moment in the evolution of our tourism industry. We will work with Government and stakeholders to support a new Tourism Policy for our island and review and reset Visit Jersey's own strategy and Destination Plan to renew our business for the future.

The Importance of Tourism

Tourism is one of Jersey's few indigenous industries, it is part of the island's "DNA," an export industry, and a key driver of building our reputation around the world. It is a success story. The clear evidence shows that since the founding of Visit Jersey, the underlying inbound tourism trend has reversed previous declines in both visitor numbers and spend to the end of 2019.

A vibrant visitor economy delivers benefits that go far beyond the purely economic:

1. GVA in Jersey is directly generated by inbound tourism from tourism-facing sectors of the economy. Including the wider impacts generated by indirect and induced GVA, tourism accounts for 8.8% of Jersey's GVA (2019).
2. 11.6% of employment is in tourism and hospitality (2019).
3. GVA per FTE of the hospitality sector has increased by +8.2% since the end of 2014 compared to a -3% decline for the overall economy.
4. Tourism works in synergy with our financial, digital and agricultural industries in supporting many high-quality hotels and restaurants.
5. Visitors underpin the viability of numerous routes by air and sea for the benefit of residents whether on holiday, business or from VFR. 65% of passengers coming through our ports during 2019 were visitors.
6. Visitor spending is crucial to the financial viability of many leisure facilities enjoyed by islanders, a number of which are operated by charities; there is a much wider offering of restaurants, cafes, bars, activities and attractions in Jersey because of the tourism industry. Some of these businesses would not be able to operate based only on local demand. These services and amenities benefit the local community and increase the standard of living for residents.
7. Visitors spent £280m in Jersey in 2019. All of this is "export earnings".
8. Visitors paid GST of some £14 million in 2019, about 14% of the GST tax take. They also paid duties on fuel and alcohol.
9. Visitor spending generates around £27 million extra turnover for retail, helping keep our high street vibrant.
10. Visitors spend money on our taxis and buses, supporting their viability for residents.
11. Customer service training and work ethic gained working in the tourism sector is almost certainly the foundation of many successful careers in other sectors.
12. Tourism provides financial support and a greater incentive to preserve the island's historical and cultural heritage.
13. Tourism provides all-important diversity to our economy.
14. Experienced more than ever during the lockdown, tourism contributes to the sense of place of islanders, with citizens feeling proud of their island.

By 2030 Visit Jersey had a target 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 (JDP). 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 was 748,000 visitors spending £265m, with actual performance in 2019 resulting in 770,000 visitors spending £279m.

Since March 2020 and the catastrophic impact of the Covid-19 (CV-19) global pandemic, the 2020 targets have been unable to be achieved and our KPIs have been suspended. The 2030 ambition of 1 million visitors spending £500m per annum must be reviewed and reset if appropriate, which will be led by the new CEO of Visit Jersey who took on the post in September 2020. This review will also take account of the Island's commitment to carbon neutrality by 2030.

While there are a number of different scenarios which could play-out over the next 2-3 years affecting Jersey's visitor economy, there are some factors we already know:

- Consumer behaviours and demand have been affected by CV-19 already and they will continue to be influenced by concerns regarding the implications on safety brought on by the pandemic. In particular, travellers are looking for destinations that are safe, trusted, and hygienic. They are searching for places with space, an open environment, are not too far to travel to and can offer a self-contained experience. These are all elements that Jersey can and has been able to offer.
- There has been a shift in demand. For example, we have seen an increase in younger audiences growing their share of the (albeit much smaller) market. There is likely to be a change in socio-demographic demand, especially in 2021 when there will still be a reluctance to travel to more exotic, long-haul destinations. The UK already accounted for 64% share of visitor numbers and 78% share of overnight stays in 2019. With the decline of the French day-trip market and further threat from the withdrawal of EU ID cards for use entering Jersey, it is highly likely that we will experience an increase in both the share of the UK market as well as the opportunity for growing demand from the UK, which could be extremely positive for Jersey's recovery, long-term growth and productivity.
- In order to recover our visitor economy, **access and connectivity** to Jersey is critical and **a key priority for 2021**. There will be a need to increase our partnership marketing spend with EasyJet, British Airways, Blue Islands and Condor Ferries and we should look to new carriers to increase our regionality and diversification to mitigate against future carrier risk.
- When the travel industry returns to some semblance of normality, competition is going to be fierce. Over-capacity and soft demand, influenced by the economic crisis and safety concerns will fuel an extremely competitive industry, fighting for survival and fighting for each discretionary £1 spent by consumers. For example, the Hungarian government has already prioritised tourism, spending €57 million on reinvigorating tourism, targeting key strategic markets and the Irish Tourism Recovery Taskforce, sponsored by the Irish

Government, has requested an increase in marketing investment from €57 million to €127 million.

- Safety and reassurance have already played key roles in making Jersey an attractive proposition. With uncertainty and ever-changing developments, flexibility and assurance of cancellation/re-booking have for many consumers been more important than price, and those companies that can offer the guarantee of flexibility will undoubtedly have a competitive advantage. Rapid-results testing will need to be prioritised by governments to recover international travel.
- We have already experienced major changes including significantly shorter booking periods and last-minute travel affecting our planning periods – from two or three key planning periods a year to planning on a month-by-month basis, if not more frequently. This will require a more agile and flexible workforce, able to pivot at short notice and have the resilience to adapt to this new, fast-paced way of working.

Strategic Business Plan 2020-2023

Visit Jersey's Purpose and Approach

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 3).

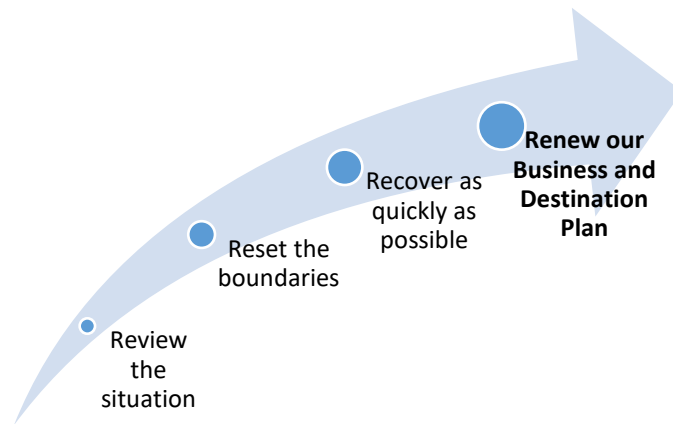
Our overwhelming priority is to “inspire and encourage visitors to visit and explore Jersey”.

As an organisation, responding to the impacts of CV-19, our approach in 2021 will be:

Distinctive	Creative	Collaborative	Innovative	Long and short-term
<ul style="list-style-type: none"> • Creating a strong USP for Jersey to drive desire to visit 	<ul style="list-style-type: none"> • In our ways of working 	<ul style="list-style-type: none"> • Being inclusive with stakeholders and partners and integrating activity where appropriate 	<ul style="list-style-type: none"> • Product development to match experiences with our target audiences and provide more reasons to come to Jersey 	<ul style="list-style-type: none"> • Thinking long-term to adapt to changing behaviours and opportunities • Short-term tactical agility to respond to changing circumstances

We will advise Government and the industry on tourism matters, particularly those affecting competitiveness and responding to CV-19. We will also strengthen our alignment with other organisations such as the Ports of Jersey, Jersey Hospitality Association and other Arm's Length Bodies to ensure we optimise all opportunities collaboratively and to protect the wider benefits of tourism to our community (such as access).

There are a number of different scenarios Visit Jersey will be assessing and stages to go through to reset the **2020 – 2023 Strategic Business Plan**. Critical to this will be the strongest possible recovery we can deliver for 2021, to optimise our visitor economy base for the medium and long term.



The UK market will be a particularly important target market for Jersey in 2021. There is already much pent-up demand for travel and macro-economic and behavioural changes will impact the decisions UK travellers make, which Jersey could benefit from.

- There is likely to be a decrease in long-haul demand from UK travellers due to a preference for shorter travelling times, a reduction in long-haul capacity and increase in prices.
- UK travellers will be keen to travel to destinations that are safe and closer to home.
- The as-yet unknown impact of Brexit negotiations, affecting foreign exchange and access to Europe.

In 2021, we will focus on

1. Supporting connectivity.
2. Recovery to 2019 performance as soon as possible.
3. Increasing market share of the UK domestic market.
4. Recovering visitors from Germany & France, especially as Germans are high spenders.
5. Growing the market by broadening the appeal of the base including short-term weekend visitors, off-season visitors with sporting and nature-based activities and promoting Jersey's natural assets.

Any plan can only be a guide to future actions. At the time of writing 1) it is unknown how long the pandemic will continue for, 2) access will influence visitor numbers, 3) how the Jersey industry landscape survives and evolves will impact the opportunity for the visitor economy, 4) the global economic impact and how Brexit will play out is another uncertainty, 5) hospitality businesses are increasingly facing severe staff shortages which is impacting opening times and service levels. We will undoubtedly need to pivot to respond to these factors, so flexibility and agility will be key.

This Plan sets our Visit Jersey's agenda, but we will redirect our resources and efforts to respond to changing circumstances.

This Plan is predicated on a £5.75 million investment from the Jersey Government.

2021 Corporate Priorities

Our key focus and priority areas in 2021 will be:



This will be achieved through the following Corporate priorities:

Create and deliver marketing plan	<ul style="list-style-type: none"> • Scenario plan based on access and macro-economic factors. • Promote advantages of Jersey proximity and safety. • Develop new customer and market segments. • Build interest and drive conversion.
Access and Industry collaboration	<ul style="list-style-type: none"> • Protect and recover access and frequency. • Support Industry with more marketing opportunities. • More trade focus. • Support Government on policy development. • Raise profile of Visit Jersey's work.
Develop organisational capability	<ul style="list-style-type: none"> • Review and reset our 2030 Destination Plan. • Ensure organisational structure is fit for purpose. • Develop team and organisational resilience. • Comply with all governance and legal requirements. • Review and reset our 2030 Destination Plan.
Marketing resources and strategy	<ul style="list-style-type: none"> • Successful migration of new jersey.com website. • Review brand blueprint to align with new Destination Plan, vision and values. • Align messaging with target audiences.
Champion productivity and competitiveness	<ul style="list-style-type: none"> • Stretch season and encourage more shoulder-season travel. • Develop experiences to match customer segments. • Support our Events sector to champion and promote activity to increase productivity and sustainability (such as SLT). • Focus on eco-tourism opportunities and address climate change challenges to support 2030 carbon-neutral vision.

2021 Budget

This is an indicative breakdown. Given the global uncertainty and work required to analyse and provide more accurate forecasts on which best prospects will yield the highest returns for the visitor economy, final allocation may differ and fluctuate due to the volatile situation we are operating in.

ACTIVITY	%	SUB-TOTAL
ACCESS	20%	1,170,000
Co-operative Marketing activity working with airline and ferry partners		
CUSTOMER ENGAGEMENT	31%	1,762,000
B2C Marketing including advertising, PR, website and consumer emails		
TRADE	9%	511,000
B2B Sales and Marketing including co-operative marketing with OTAs, tour operators, trade events and exhibitions, travel trade relationships and programme development and trade memberships		
INDUSTRY	4%	253,000
Product Marketing including industry relationships, festivals, events, guides, industry & trade emails, business website		
RESEARCH & INSIGHTS	8%	438,000
Marketing insights, customer segmentation, economic forecasts, strategic development and visitor surveys		
TOURIST INFORMATION CENTRE	4%	240,000
EMPLOYMENT COSTS	20%	1,148,000
Staff Costs, Board and secretariat costs		
ADMINISTRATIVE COSTS	4%	228,000
Office premises, IT and comms costs, admin expenses (audit, accounting, post, stationery), bank charges		
TOTAL		5,750,000

2021 Measurement

Once we have more clarity on access and the industry landscape in 2021 we will be able to work with PoJ to forecast targets and KPIs for Jersey's visitor economy. Until then, the ambition will be to recover to 2019 levels as quickly and efficiently as we can.

Jersey's Visitor Economy Forecast

Visit Jersey seeks to influence

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.

INDICATIVE TARGETS (may change to reflect new Destination Plan, how and when we recover from the pandemic and what the access and industry position is.)

2021 Priorities	Measure	Measurement Method	Baseline 2019 Actuals	2021 Forecast/Target
Create & deliver market plans	Total visitors	Exit Survey	770K	TBC
	Visitor spend-nominal	Exit Survey	£280m	TBC
	Overnight Holiday Visitors	Exit Survey	439K	TBC
	Holiday visitors' total bednights	Exit Survey	1.92m	TBC
	First time holiday visitors	Exit Survey	50%	50%
	Holiday Visitor Approval Score (Net Promoter Score)	Exit Survey	58%	58%
	Marketing: ROI on grant	Campaign evaluation	6:1	TBC
	Travel Trade satisfaction with VJ*	Stakeholder survey	80%	TBC
Build on-island engagement	On-island Information Provision	Visitor satisfaction survey	86% (2018)	88%
	Co-operative Marketing Investment	Matched or value in kind equivalent funding from access and trade	NEW	£500K
	Number of Industry opportunities	Industry opportunities offered	NEW	250

Develop organisational capability	Staff motivation	Culture Club survey	3	3
Productivity and Competitiveness	New product experiences	Content calendar	NEW	5 new experiences

Please note:

1. We will be reviewing our ROI methodology for 2021.
2. We are adding some new KPIs for 2021. Evaluation methodology is provided in Appendix 4.

**Need to assess how we contact the trade given the dire situation the industry is in currently. There is already shrinkage and consolidation and we need to understand what the trade landscape will look like in 2021 before defining the satisfaction targets.*

APPENDICES

APPENDIX 1: 2021 Corporate Priority Activity

Create and deliver marketing plan		
Activity	Outputs	Outcomes
Scenario plan based on access and macro-economic factors	Work with OE, PoJ and key trade and industry suppliers on assumptions that consider different possible futures and what we can do to shape more beneficial futures.	<ul style="list-style-type: none"> 2 – 4 different possible outcomes for the recovery of Jersey's visitor economy over the coming years.
Develop market segment plans, based on new consumer research to be undertaken during the year.	<p>Taking those scenarios and working with insights agency to define our target audiences, by market.</p> <p>Particular focus on how to realise the visitor opportunities from the UK market.</p>	<ul style="list-style-type: none"> New customer and market segments to target.
Build awareness and drive conversion to our best prospect segments.	Review our marketing communications strategy in the 'new normal' to ensure our messaging meets the needs of our identified target audiences.	<ul style="list-style-type: none"> Increase awareness and desire to travel. Positioning aligns with target audiences and is effective in achieving marketing objectives. Delivers a minimum ROI of 6:1 for all marketing investment.
Review and re-set our 2030 Destination Plan	<p>Strategic review of our previous Destination Plan.</p> <p>Work with Government and ALOs on future economic development plans and Tourism Policy Strategy.</p>	<ul style="list-style-type: none"> Launch new 2030 Destination Plan in 2021, reflecting the changes to the global economy and re-aligning with Jersey's future Tourism Policy Strategy.
Access and Industry collaboration		
Protect and recover access and frequency.	<p>Work with PoJ on partnership agreements with airlines and ferry companies to reassure them on the viability of Jersey as a key and profitable destination for their route networks.</p> <p>Co-operative marketing spend and activity with EasyJet, BA, Blue Islands, Condor and other interested carriers.</p>	<ul style="list-style-type: none"> Adequate capacity to meet UK demand (including non-visitor demand), throughout the year. Regional connectivity. Re-opening access to German speaking markets. New routes for new markets.

Supporting Industry and Trade partners with recovery programme and knowledge sharing.	<p>Act as a trusted advisor to partners.</p> <p>Share on-island partner intelligence with VJ team.</p>	<ul style="list-style-type: none"> - Initiate a bold campaign to promote Jersey in the new year (e.g. 'Jersey on Sale') for partners to participate in. - Develop a suite of itineraries to sell Jersey based on customer sentiment to feed into trade and consumer channels e.g. slow/responsible travel. - Create an Ideas Deck for island tourism suppliers and trade partners to help leverage opportunities and share best practice. - Understand industry needs by creating key supplier groups e.g. guest houses, value sector, self-catering, attractions/activity providers. - Collaborate with other ALOs e.g. Jersey Business, Digital Jersey, Genuine Jersey to support and develop our industry. - Manage the creation of on-island guides.
Supporting Government on policy development, acting as trusted advisor.	Continue to provide the organisation and stakeholders with research expertise to aid decision making and facilitate recovery.	<ul style="list-style-type: none"> - Successful completion of research projects that contribute to improved decision making by Visit Jersey, Government and third parties to make evidence-based decisions in a post-COVID world. - Exit Survey, in partnership with Statistics Jersey. - Brand Tracker. - STR Accommodation Reporting - Jersey Attractions Benchmark Survey. - Ad-hoc research to support business objectives including developing consumer segments and reviewing the product offering.
Raise profile of Visit Jersey's working (upcoming and performance) to our stakeholders.	<p>Raise the profile of the work VJ is doing in Jersey.</p> <p>Share marketing plans to enable Industry and Trade to dovetail with VJ activity, where appropriate.</p>	<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.

	<p>Act as a trusted travel industry advisor to on-island partners.</p> <p>Be alert to niche product opportunities to fill product gaps that respond to customer needs.</p>	<ul style="list-style-type: none"> - Increase in number of trade partners promoting Jersey - Trade satisfaction survey. - Destination events and training delivery.
Develop organisational capability		
Ensure organisational structure is fit for purpose for the new Destination Plan.	Review requirements from new Destination Plan.	<ul style="list-style-type: none"> - Organisational structure with clarity on roles and responsibilities and accountabilities.
Team and organisational resilience.	<p>Build learning, flexibility, accountability and experimentation as core skills.</p> <p>Train people to think and behave differently, to be more creative and innovative and communicate well.</p> <p>Training and development and succession planning.</p>	<ul style="list-style-type: none"> - Effective and efficiently organisation. - Highly motivated. - Ability to adapt and pivot based on change requirements. - Drive critical thinking and analysis. - Commercial knowledge and understanding of travel and tourism industry. - Opportunities for promotion and increased skillsets and capabilities.
Compliance with all governance and legal requirements and recommendations.	Safeguard the organisation's structure and strategy to deliver business objectives in both the short and long term.	<ul style="list-style-type: none"> - Successful Public Accounts Committee review of progress in early 2021. - Adherence to all company policies and procedures (including Schedule of Matters). - Quarterly submissions to EDTSC all successfully signed-off. - Publish 2020 Financial Statements and Annual Report with no adverse comments (in Spring 2021). - Maintain a GDPR compliant and cyber-secure business. - Staff training and development to support personal and corporate objectives. - Reviewed Culture Club programme and targets in light of new ways of working in 2020.

Marketing resources and strategy		
Jersey.com website	Successful migration of new jersey.com website.	<ul style="list-style-type: none"> - Enabling more functionality and capability for consumers and business partners. - Improved user experience and conversion of digital targets. - More responsive and adaptive to marketing opportunities.
Review brand blueprint to align with new Destination Plan.	Brand blueprint and organisational values reflects our 2030 Destination Plan and Jersey's sustainability ambitions for 2030.	<ul style="list-style-type: none"> - Clearly defined purpose, vision, mission and values that are communicated, understood and embraced both internally and externally.
Align messaging with target audiences.	Review marketing positioning and creative strategy once customer segmentation strategy has been defined to ensure our messages match our target audience.	<ul style="list-style-type: none"> - Distinctive, inspiring and effective creative that encourages desire to visit Jersey.
Champion productivity and competitiveness		
Stretch season and encourage more shoulder-season travel.	<p>Champion Nov – Mar tourism opportunities and experiences.</p> <p>Support existing and new events that offer growth opportunities; where appropriate include marketing and communication activities to support.</p> <p>Support the 2021 Super League Triathlon.</p>	<ul style="list-style-type: none"> - Annual monthly content calendar matching and developing experiences to meet customer segment demand throughout the year. - Increased short breaks activity.
Develop experiences to match customer segment needs, particularly beyond peak-season.	<p>Supporting business and individuals seeking to develop tourism products and services</p> <p>Create and deliver an annual short breaks campaign with seasonal adaptations.</p>	
Focus on eco-tourism opportunities to support 2030 carbon-neutral vision.	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 and also how the tourism sector can support Jersey's Sustainable Transport Policy (e.g. encouraging 'greener' transport initiatives).	<ul style="list-style-type: none"> - Long term outcomes that move the island's tourism offer to a more sustainable basis.

APPENDIX 2: Risk Management

A comprehensive risk register is maintained. It is reviewed by the Audit Committee and approved at all VJ board meetings.

Key Positive Risks

- Jersey could present itself as a safe, secure and alternative 'exotic' destination to the UK Staycation market who don't want to travel too far during 2021.
- With the right investment, the UK market could be a driving force in the recovery of the visitor economy due to pent-up travel demand, a desire to travel closer to home to safe destinations and limitations on long-haul travel options.
- Brexit could be viewed positively relating to demand.

Key Negative Risks

- CV-19 pandemic continues.
- Recession.
- Significantly reduced connectivity continues. Major carriers' financial performance worsens leading to changes in their route network.
- Loss of hotel capacity.
- Insufficient staff available for businesses which impact on service delivery.

APPENDIX 3: 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 4: New KPI Evaluation

Co-operative Marketing Investment

This will be an evaluation of matched cash funding or marketing value in kind (media costs, access to databases, etc.) from access and trade partners Visit Jersey works with in 2021.

For example:

1. If working with a ferry company on a combined campaign and Visit Jersey contributes £50K to the campaign and ferry company contributes the same cash value of £50K to the campaign, the investment would be £50K from the partner.
2. If working with an airline on a campaign and Visit Jersey contributes £150K cash to the campaign and the airline contributes £100K towards the media buying, plus £25K of advertising through their owned assets such as in-flight magazine or database, the investment would be worth £125K.

Number of Industry opportunities

This will be evaluated by the number of opportunities Visit Jersey presents to the Industry and Trade.

For example:

1. Each promotional opportunity on Visit Jersey's website for a company would count as 1 opportunity.
2. If organising a destination event bringing 5 buyers from France to meet 4 hotels in Jersey, this would count as 20 opportunities.

New Product Experiences

This will be evaluated by the number of new itineraries or programmes launched and promoted during the year.