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:

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

<table>
<thead>
<tr>
<th>Visit Jersey Targets</th>
<th>What do we measure</th>
<th>Expected Results</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brand Performance</td>
<td>• Brand sentiment towards attributes</td>
<td>• 2016 Benchmark+ 2%</td>
</tr>
<tr>
<td>Marketing Performance</td>
<td>• Return on investment of 5:1</td>
<td>• ROI on marketing spend</td>
</tr>
<tr>
<td></td>
<td>• Visitor traffic</td>
<td>• 76,000 incremental visits</td>
</tr>
<tr>
<td></td>
<td>• Data captured</td>
<td>• 267,000 incremental bed nights</td>
</tr>
<tr>
<td></td>
<td>• Content engagement</td>
<td>• Unique visitor traffic: 1.5 million visitors</td>
</tr>
<tr>
<td>Activity Performance</td>
<td>• Industry referral leads generated</td>
<td>• Partner referrals: 133,000</td>
</tr>
<tr>
<td></td>
<td>• industry satisfaction</td>
<td>• Partner satisfaction survey: 2016 benchmark +2%</td>
</tr>
<tr>
<td>Trade Conversion</td>
<td>• Industry referral leads generated</td>
<td></td>
</tr>
<tr>
<td>(including Events Jersey)</td>
<td>• industry satisfaction</td>
<td></td>
</tr>
</tbody>
</table>

**Target Segments**

**UK**

**Retain 1**
- 55+
- Retired / working
- 2+ holidays a year
- 3-6+ month lead time
- Package driven
- 60 miles from departure points
- ABC1

**Retain 2**
- 25-54
- Working
- 1+ holidays a year
- 3-6+ month lead time
- Package driven
- 60 miles from departure point
- ABC1C2

**Convert 1**
- 25-54
- No children
- 2+ holidays a year
- 4-6-week lead time
- Working
- Independent traveller
- 60 miles from departure points
- ABC1

**Convert 2**
- 25-54
- Children
- 2+ holidays a year
- 4-6-week lead time
- Working
- Independent traveller
- 60 miles from departure points
- ABC1

**France**

**Day-tripper**
- 25-54 (or groups)
- Children
- 2+ holidays a year
- Holidaying in the region
- Working
- Independent traveller
- ABC1

**Short stay**
- 25-54
- no Children
- 2+ holidays a year
- West/North West France
- Working
- Independent traveller
- ABC1
German speaking countries

<table>
<thead>
<tr>
<th>Retain &amp; Grow</th>
<th>Convert</th>
</tr>
</thead>
<tbody>
<tr>
<td>• 55+</td>
<td>• 25-54</td>
</tr>
<tr>
<td>• Retired / working</td>
<td>• no Children</td>
</tr>
<tr>
<td>• 2+ holidays a year</td>
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<td>• 3-6+ month lead time</td>
<td>• 60 miles from departure points</td>
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<tr>
<td>• Package driven</td>
<td>• Working</td>
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<tr>
<td>• 60 miles from departure points</td>
<td>• Independent traveller</td>
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<tr>
<td>• ABC1</td>
<td>• ABC1</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Total Grant</th>
<th>£5,100,000</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Staff Costs</td>
<td>£995,000</td>
</tr>
<tr>
<td>Research &amp; Intelligence</td>
<td>£360,000</td>
</tr>
<tr>
<td>Product</td>
<td>£220,000</td>
</tr>
<tr>
<td>Marketing</td>
<td>£2,360,000</td>
</tr>
<tr>
<td>Trade Development incl. co-operatives</td>
<td>£550,000</td>
</tr>
<tr>
<td>Tourist Information Centre</td>
<td>£250,000</td>
</tr>
<tr>
<td>Events Jersey</td>
<td>£200,000</td>
</tr>
<tr>
<td>Total Premises Costs</td>
<td>£55,000</td>
</tr>
<tr>
<td>Total Administrative Expenses</td>
<td>£110,000</td>
</tr>
</tbody>
</table>

### 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

[Diagram of organisational structure]

Rachel Winchurch
Executive Assistant to CEO

Keith Beecham
Chief Executive Officer

Oliver Archbold
Head of Corporate Services

Adam Caerley-Smith
Head of Marketing

TBC
Market Development

Jennifer Ellenger
Head of Product Development

David Edwards
Head of Research, Insights & Evaluation

Suzanne Kirk
Events Jersey Business Development Manager

VSC/Ports of Jersey
Team

Rebecca A’Court
Digital Exec

Sarah Richardson
Marketing Exec

Jo Willis
Campaign Exec

Meryl le Feuvre
Online Trade Exec

James Walker
Executive - Product Development

Karen Evans
Executive - Product Development