

Visit Jersey Limited Business Plan 2019



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1. Our Business

The Jersey Destination Plan sets out an ambition for Jersey's tourism sector (visitor economy) and lists the key ambitions as:

- 1 million visitors before 2030
- A future visitor spend of £500m per annum
- An industry whose contribution to the Island community is recognized beyond its fiscal impact

Over the shorter period to 2020, the JDP lists performance targets of 800,000 visitors spending £310m

Visit Jersey is transitioning from a Destination Marketing Organisation to become Jersey's Destination Leadership Organisation (DLO) which **directly** impacts on the visitor economy through marketing initiatives and **indirectly** by influencing product and trade developments.

Our Vision *why we exist*

Our Vision: We exists to fulfil our community's needs; our initiatives help Jersey be a place that's good to live in, to work in, to play in, to attract businesses and investment- and a place that's great to visit

Our Mission *how do we do this*

Our mission: Champion tourism and help Jersey fall in love with tourism

Our Goals *what are we trying to achieve*

Our Goals: 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

2019 priorities

Government Priorities

Tourism is a growth sector identified by the States of Jersey (The States Enterprise Strategy). Visit Jersey supports the Enterprise Strategy through the delivery of campaigns, sharing of insights and developing high-value co-operative work with partners. Government wishes to improve the productivity of our economy and there is considerable potential to do that in the visitor economy.

Visit Jersey Priorities

We have made good progress on consumer marketing and branding, and launched a Product and Events Strategy. In April 2019 Visit Jersey will be four years old. We have moved beyond the “start-up” phase and this Business Plan reflects our changing business intentions. Whilst continuing to market Jersey in innovative ways we will strengthen our partnership working with travel firms and on-island suppliers. Our trade, product and marketing teams are all established and in 2019 we will concentrate on ensuring that we leverage all three to maximum effect. We will better align our marketing-product-trade programmes and a key shift in 2019 will be to extend our reach with and through third parties into markets and consumers.

In 2019 Brexit will be a defining moment for the UK, Europe and Jersey. Brexit represents both opportunity and threat. This Business Plan seeks to ensure the Jersey visitor economy is not disadvantaged and capitalises on this generational opportunity.

Programme

- Launch and deliver year 1 of a new Trade strategy to extend reach and grow the distribution of our tourism products
- Create and launch 1) Brexit, 2) Liberation 75 and 3) Route growth campaigns for Europe (*subject to funding*)
- Deliver seasonal campaigns rolling out #theislandbreak profiling signature experiences
- Deliver year 2 of Product strategy to support the sector’s productivity and competitiveness, especially out of main summer period
- Deliver year 2 of the Events strategy to include growing off-island visitors to the Super League Triathlon and encourage new events
- Implement the outcome the Tourist Information Centre supplier and customer audits
- Remain agile and respond to ad-hoc promotional opportunities that might arise that help achieve business targets

Operations

- Commence a programme to review internal processes and operating practices and consult with other Arms-Length-Bodies
- Stabilise team after a period of change
- Maintain a GDPR compliant business
- 360° review for all staff to inform 2020 personal development
- Retender the German representative supplier and marketing agency contracts and any other whose contract fall due
- Review IT support requirements to ensure the business remains resilient, agile and efficient; both hard and software

Policy

- Champion tourism and highlight Visit Jersey’s contribution to the sector
 - Be the voice for the visitor economy and contribute to the States of Jersey Economic Framework initiative
 - Sell the productivity opportunity for the visitor economy to the political and wider business community
 - Provide insights and leadership for the industry on policy matters, working closely with the Jersey Hospitality Association and other associations
 - Explain how the visitor economy benefits the island’s community; economic and societal, using on-island PR opportunities
- Produce “tourism papers” to inform public debate on matters affecting the visitor economy
- A refreshed Jersey Destination Plan will be shared with stakeholders in December 2018 and progress monitored in 2019

2. Our 2019 Activities

Visit Jersey seeks to 1) stimulate demand to visit Jersey (**Marketing**), 2) influence tourism experience/product development (**Product**) and 3) work with travel trade partners to distribute and extend the reach of our tourism products (**Trade**).

Countries and Segments- our best prospects. In 2017:

- UK visitors represented 75% of visitor spend 77% of visitor nights
- French visitors represented 7% of spend 6% of nights
- German visitors accounted for 4% of spend 4% of nights
- Guernsey visitors represented 3% of spend 2% of nights
- Other countries include Ireland, Netherlands, Switzerland, but generally none exceed 1% of total

UK							Germany	
Nurture 1	Nurture 2	Grow 1	Grow 2	France	School Trips	Short Stay	Nurture 1	Grow 1
3.3 million people	1.84m	1.25m	1.33m					
55+	25-54	25-54	25-54	25-54	To 16	25-54	55+	25-54
No dependent children		No children	Children		Children	No children	No dependent children	No children
Retired/working	Working	Working	Working	Working	In school	Working	Retired/working	Working
2+ holidays a year	1+ holiday a year	2+ holidays a year	2+ holidays a year	2+ holidays a year		2+ holidays a year	2+ holidays a year	2+ holidays a year
3-6 months lead time	3-6 months lead time	4-6 weeks lead time	4-6 weeks lead time	2-1 weeks lead time	3-6 months lead time		3-6 months lead time	3-6 months lead time
Package preference	Both Package & Independent	Independent	Independent	Independent	Group	Independent	Package preference	Packaged & Independent
60 miles from departure point	60 miles from departure	60 miles from departure point	60 miles from departure point	Holidaying in the region	West France	West & North West France	60 miles from departure point	60 miles from departure point
ABC1	ABC1C2	ABC1	ABC1	ABC1	-	ABC1	ABC1	ABC1

Marketing

Programme Budget- £1,975,000

Our marketing and communications must be excellent to engage with potential visitors in a cluttered and noisy marketplace. Research will help identify and target best prospects. Marketing will create campaigns which will be shared through 1) Visit Jersey owned channels (direct influence) and 2) third party channels, especially travel firms (indirect influence). In this way we will extend our reach in 2019.

UK

1. **Build** brand Jersey

The island break for optimists who want to come up for air

We will **Create** and **Curate** stories that drive engagement. This will be done through the provision of seasonal, relevant campaigns:

- **Summer** nurture our loyal summer visitors, often on packaged holidays, and remind them just how special Jersey is
- **Other seasons** concentrate on grow segments highlighting the short break and special interest opportunity for a holiday

PR and social media will help build engagement. We will 1) maintain a Media Library of tourism supplier and Visit Jersey images/videos, 2) distribute Media Alerts and Instagram stories, and 3) host media/blogger trips that support our campaign objectives.

Additionally, we will identify possible brand partners, in both travel and lifestyle sectors, to help amplify brand Jersey using these third-party channels.

We will explore working with Visit Guernsey on a Channel Island proposition- where it makes sense, particularly in German speaking countries where there is good awareness of the Channel Islands and holidays are characterised by island hopping.

We will be prepared to respond with a tactical plan to leverage Brexit (see below).

2. **Extend** brand Jersey reach

We will work harder to **distribute** Jersey tourism products through our and travel trade partners' channels:

- Visit Jersey own channels (e.g. jersey.com)
Working at the top of the "sales funnel" to grow the consideration set (number of people we can interest in Jersey) = more engagement
- Third party channels (e.g. tour operators)
Provide travel trade operators with timely content and materials to support their sales efforts; effectively working at the base of the "sales funnel" = more engagement and sales. Travel trade firms can be amplifiers; be both story-tellers and sellers of Jersey tourism products to their customers. The Marketing team will support the Trade team with propositions and materials that can be shared with travel trade partners. The time scales are longer for this travel trade-partner marketing and our campaign planning will be adjusted to accommodate this.

The Marketing team also supports the Product team, helping them communicate brand Jersey to our tourism and hospitality suppliers.

France

Budget £285,000

We will partner with Condor France and island suppliers. Our two tasks will be 1) sustain the day visits number and 2) grow staying holiday visitors. We will maintain a French language website and always-on social media. The nature and timing of activities in France will be agreed with Condor France in late 2018. We will consult with Normandy Tourism, Manche Iles Express and Bureau des îles-Anglo-Normandes (BIAN) to take advantage of any emerging opportunities, perhaps around the French 75 Liberation in 2019 and use this as a platform for our own Liberation 75 campaign in 2020.

German speaking countries

Budget £360,000

In German speaking countries our marketing efforts will focus on travel trade operators- see Trade section below. In addition there will be limited direct to consumer activity, which will include hosting media visits and social media to support tour operator programmes.

Trade Sales & Cooperative Promotions

Programme Budget £686,000

The Trade Manager will work with Hills Balfour (our travel trade representative agency based in London) to implement the new Trade strategy that aims to push more Jersey inventory through travel distribution channels. Specifically, this means nurturing existing partnerships and identifying, courting and capturing new sources of visitors via travel trade partners- traditional and niche specialised tour operators, OTAs, carriers (scheduled and charter- current and potential new airlines). Inter-islands offer an opportunity to encourage appropriate transportation linking the islands. This would support visits to Jersey from Guernsey residents and those holidaying in Guernsey. The following trade activities will be completed:

- VJ will invest in and leverage travel trade tour operators. We aim to 1) protect current charter routes and 2) build on 2018 summer charter seat numbers. This will be achieved by 1) extending the start and/or end of the charter durations and 2) stimulating new source origination airports
- Deploy the findings from the 2018 Trade research and approach key travel trade intermediaries in the UK and Europe who do not include Jersey. Initiate relationships with them to influence 1) their understanding of Jersey and 2) their selling of Jersey products
- Manage the Travel Trade “Market Development Challenge Fund” and oversee “Risk Share” agreements with European operators. These interventions will be measured by either consumer or partner surveys
- Where appropriate, identify and initiate trade promotion opportunities (e.g. ITB, WTM, sector-seminars) to promote Jersey as a visitor destination. This may be solo or in partnership with others such as Visit Guernsey
- In France explore opportunities to retain day visits and build staying holiday visitor numbers
- Formulate a plan to leverage route development (see below)

Product

Budget £98,000

The Product team will create and deliver opportunities to 1) improve the productivity of the Jersey tourism sector, particularly to extend the summer season into the shoulder months. Product includes events-led tourism.

In 2018 a Product strategy was launched. At the heart of our product work is a drive to seek continuous productivity improvements of tourism assets and strengthen our competitiveness. In 2019 we will:

- Align our product work to the Island break promise
- Manage the supplier partnership programme across ‘stay’, ‘see and do’, and ‘eat and drink’
- Package up additional ‘Signature Experiences’ with the full engagement of our suppliers
- Implement the recommendations noted in the Product Action Group, predicated on deepening support across government departments, and working in collaboration with industry partners
- Develop a suite of day itineraries suitable for Guernsey day visitors and distribute through Visit Jersey and Condor channels
- Partner with JHA/education/training suppliers to influence the required tourism skillset among the resident population
- Provide industry leadership and research and support tourism investment initiatives as required (such as creation of additional self-catering units)
- Formulate a plan to leverage the 75th Liberation in 2020 (see below)

Events Jersey

(excludes staff costs) Programme Budget £150,000

Events Jersey focus is on driving visitation in the shoulder months. An Events Strategy was published in 2018. In 2019 Events Jersey will:

- Manage an Events Jersey Steering Group and reach out to sister organisations such as Sports Jersey to inform our approach and seek opportunities for collaboration
- Maintain the MICE section on the Events Jersey website and manage Hills Balfour, our London-based MICE agency
- Maintain an Asset Register and make this available to event organisers
- Support the 2019 Super League Triathlon. Visit Jersey will set aside £100,000 in 2019 to support the staging of SLT and promote the event off-island
- Support existing events that have a potential to grow visitor numbers; such as the Motor Festival, Boat Festival, Weekender, Festival of Words, etc.
- Launch an 'events supplier' partnership programme
- Promote Jersey to off-island event organisers highlighting that Jersey can be a 'hero' event location
- Work with the on-island business community to encourage them to host events in Jersey
- Carry out marketing and communication activities to support specific events, in consultation with event organisers

Visitors & Information Services Activities

Budget £229,000 delivered by Liberty Bus

An information service is provided on-island to help visitors:

- feel a sense of welcome
- get more from their stay in Jersey

The Tourist Information Centre (TIC) is in the bus terminal and managed by Liberty Bus, a third party. Visit Jersey oversees the management and delivery of information provision and regular performance checks will be in place to evaluate the quality of service delivery and visitor satisfaction levels. This will include periodic mystery shopping to provide continual feedback and help with staff development. Product training will be provided by Visit Jersey. In 2019 we are required to retender for the What's On Guide and Official Map; in 2018 we are conducting surveys with on-island suppliers and visitors to inform this tender.

Research

Programme Budget £310,000

The following continuous surveys and research activities will be produced throughout 2019:

Exit Survey	Brand Tracker	STR Accommodation Reporting	Jersey Attractions Benchmark Survey	Forward Booking Survey
RCA Aviation	Stakeholder & Trade Satisfaction Evaluation			

These items consume £220,00. Ad-hoc research projects will continue to support the development of our marketing activity, our website, the delivery of visitor information services and our ability to be a trusted adviser to policy-makers in Jersey.

Measurement and evaluation will continue to ensure that Visit Jersey always learns how our interventions are working, and whether they are delivering the outcomes expected. We will evaluate all our major marketing campaigns, our 'always on' consumer-facing activity, our trade interventions and the performance of the Jersey brand.

Special Projects (The following three initiatives are all subject to funds being available in addition to £4.9m core grant)

Budget £600,000

1. Route Development

Budget £150,000

In first priority (compared to the next two initiatives) should funds be available, we propose to develop a travel trade programme of joint initiatives with the Ports of Jersey that builds on Visit Jersey's Best Prospect model and the Ports Route Capacity analysis. In 2019 we will create the conditions for route expansion and in 2020 push for the beginning of the route. Funding will be required in 2020 to sustain this initiative

- Germany; support German tour operators to grow the charter market to Jersey in the shoulder months and back any carrier prepared to offer mid-week connectivity to Jersey. This will help nurture short breaks and longer stays from Europe
- Scandinavia; develop a plan to include a market visit with key Jersey partners to gauge appetite and a Scandinavian re-entry series of actions

2. Liberation 75 Product Development

Budget £200,000

Celebrate Liberation 75, a once in a generation opportunity, by chronicling and championing the island's characters and stories and leave behind a tourism legacy. Develop year-round routes and experiences and explore creating occupation-related installations. Use both on and offline methods to communicate to our target travel trade and consumer audiences; Product colleagues working with Visit Jersey Marketing and Trade teams.

3. Brexit Reassurance Campaign

Budget £250,000

The outcome of Brexit negotiations remains unclear and this initiative is to allow for tactical intervention with, probably, airline partner(s) targeting the UK spelling out the benefits of post-Brexit holidaying in Jersey. This will be supported by good value offers and in market Autumn 2019 through to Spring 2020.

3. Measurement

In 2019 Visit Jersey will report on 1) the visitor economy and 2) Visit Jersey's performance.

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 Objectives

Visit Jersey is accountable

Visit Jersey through its marketing, trade and product initiatives will aim to deliver measurable outcomes as detailed in the grid below. 2018 forecasts will be updated as information becomes available.

Visit Jersey Objectives	Measure	Measurement Method	2017 Actuals	Baseline (2018) Numbers updated at the end of 2018/Q1 2019	2019 Forecast/Target	2019 Quarterly Result
Goal 1						
Inspire visitors from overseas to visit and explore Jersey	<ul style="list-style-type: none"> Total visitors..... Visitor spend-nominal..... Overnight Holiday Visitors..... Holiday visitors' total bednights..... First time holiday visitors..... Holiday Visitor Net Promoter Score..... Marketing: ROI on grant*..... Travel Trade satisfaction with VJ**..... Satisfaction with On-Island Information Provision.... 	<ul style="list-style-type: none"> Exit Survey Exit Survey Exit Survey Exit Survey Exit Survey Exit Survey Campaign evaluation..... Stakeholder survey..... Visitor satisfaction survey 	<ul style="list-style-type: none"> 705,000 £244m 418,000 1.99m 50% 47 6:1 66% 89% 	<ul style="list-style-type: none"> 705,000 tbc £255m tbc tbc tbc 52% 48 tbc tbc tbc tbc 	<ul style="list-style-type: none"> 2018+2.2% 2018+2.5% 2018+2.5% 2018+2.5% 52%..... 2018+1..... 6:1..... 2018+1% 2018%.... 	
Goal 2						
Improve productivity of tourism assets	<ul style="list-style-type: none"> Seasonal spread ***..... Island RevPAR ****..... On-island Supplier Partner Satisfaction with VJ **..... 	<ul style="list-style-type: none"> Exit Survey STR survey Stakeholder survey 	<ul style="list-style-type: none"> 21% £74 na 	<ul style="list-style-type: none"> tbc% £74..... tbc 	<ul style="list-style-type: none"> 2018 +0.5% 2018+£2.... 2018%+1 	
Goal 3						
Maximise public investment through partner engagement	<ul style="list-style-type: none"> Marketing in Kind contribution to VJ marketing activities Gross Value Added by hospitality sector ***** 	<ul style="list-style-type: none"> MIK account Oxford Economics Report 	<ul style="list-style-type: none"> £30,000 8.3% (2015 data) 	<ul style="list-style-type: none"> £tbc tbc% (2017 data) 	<ul style="list-style-type: none"> 2018+5% +0.2% 	
Goal 4						
Advise government and the industry on tourism issues, particularly those affecting competitiveness	<ul style="list-style-type: none"> VJ tourism policy actions- government..... VJ submissions supporting visitor economy investments by businesses 	<ul style="list-style-type: none"> Papers/briefings Submissions..... 		<ul style="list-style-type: none"> tbc tbc 	<ul style="list-style-type: none"> 4 8 	

*ROI Economic measure of VJ's performance is "incremental ROI" resulting from VJ's marketing interventions. The denominator is Visit Jersey's grant. The methodology is the same as VisitBritain's which has passed NAO scrutiny and is accepted by the UK Treasury

**Satisfaction Historically only one score for both trade and product activities. From 2018 will report separately using Ecorys to survey

*** Seasonality Share of overnight holiday visits outside July to September

**** RevPAR 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

*****GVA The States report GVA of 3.7% for "hotels, restaurants & bars". The Tourism Economics Report adopted international norms and the GVA was calculated as £432m or 8.3% of whole economy output in 2016. The 2017 estimate will be available in December this year. Please note this number not only reflect the size and productivity levels of the sectors that make up tourism, since it is a 'share' of the total. It therefore also reflects the scale and productivity of other sectors in Jersey, namely finance, and to a lesser extent retail and agriculture

4. Financial Information

2019 Budget

Total Staff Costs	£961,000
Research & intelligence	£310,000
Product	£95,000
Marketing	£1,978,000
Trade incl. co-operatives	£686,000
TIC	£229,000
Events Jersey	£150,000
Premises Costs	£68,000
Total Administrative Expenses	£423,000
Total Grant	£4,900,000
Special Projects	£600,000

- i) Assumption that total grant income is £4.9m
ii) Total staff costs include executive team remuneration and board members' fees
iii) The budget is net of partner marketing financial contributions, expected to be up to £20,000

Risk management

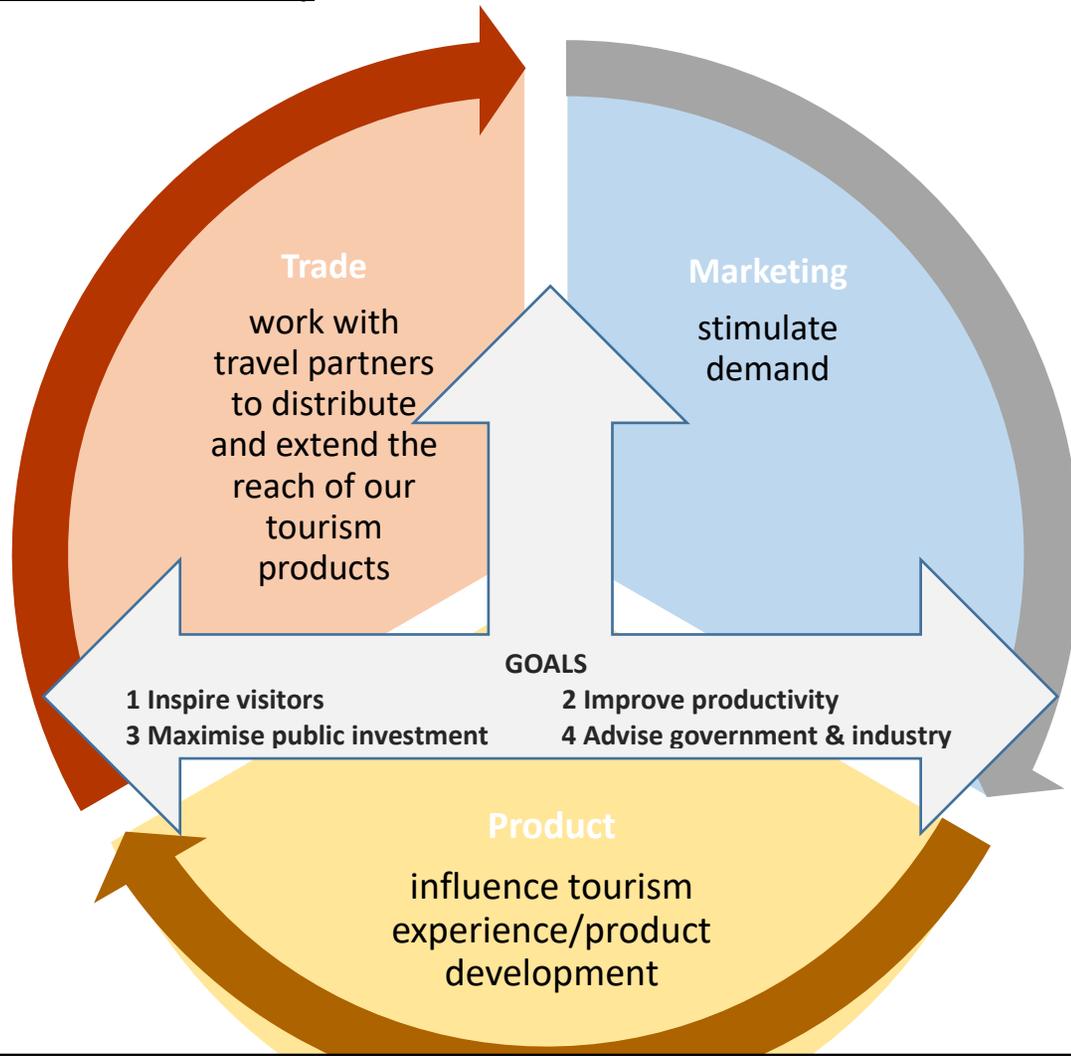
A comprehensive risk register is maintained. It is reviewed by the Audit Committee and approved at all VJ board meetings. There are four groupings of risks; strategic, reputational, operational and external. Each risk has an owner and a mitigation plan to manage the risk.

Key Positive Risks

- Deployment of larger aircraft by easyJet and BA (A319 to A320)
- Hotel investments (Premier Inn, Seymour Group, Hotel de France and others) unlocks demand for short-breaks

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
- Airport alterations lead to disruptions and or reputational harm
- A sharp deterioration in the UK economy brought about by Brexit, consumer indebtedness and rising interest rates



Strategy				
Creating Content	Curating Experiences			Distributing Product
Capabilities				
Market Research	Insights	IT	Finance	HR

Appendix 2 2019 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 2019. Other key assumptions include:

- No change to carrier mix and capacity
- Accommodation availability constrained in Summer otherwise meets demand
- Sterling remains volatile
- Terrorism activity in Europe cannot be discounted
- 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 2019 to Jersey government fiscal and population policies
- No change in UK Air Passenger Duty
- Jersey remains an attractive visitor destination

Appendix 3 Investment cases

Visit Jersey works hard to 1) inspire visitors from overseas to visit and explore Jersey and 2) help improve productivity of tourism assets. This Business Plan describes our 2019 goals, plans and budgets. If additional funding opportunities were available we would submit bids for the special projects listed above but not included in the £4.9m grant and:

1. Productivity improvement by extending the tourism season year-round with a business visits campaign targeting the UK
2. A tourism and hospitality skills campaign to boost recruitment of local citizens and skills improvement to help provide our sector with the workforce it needs