

Visit Jersey | Annual Report 2018

Explore.

#theislandbreak

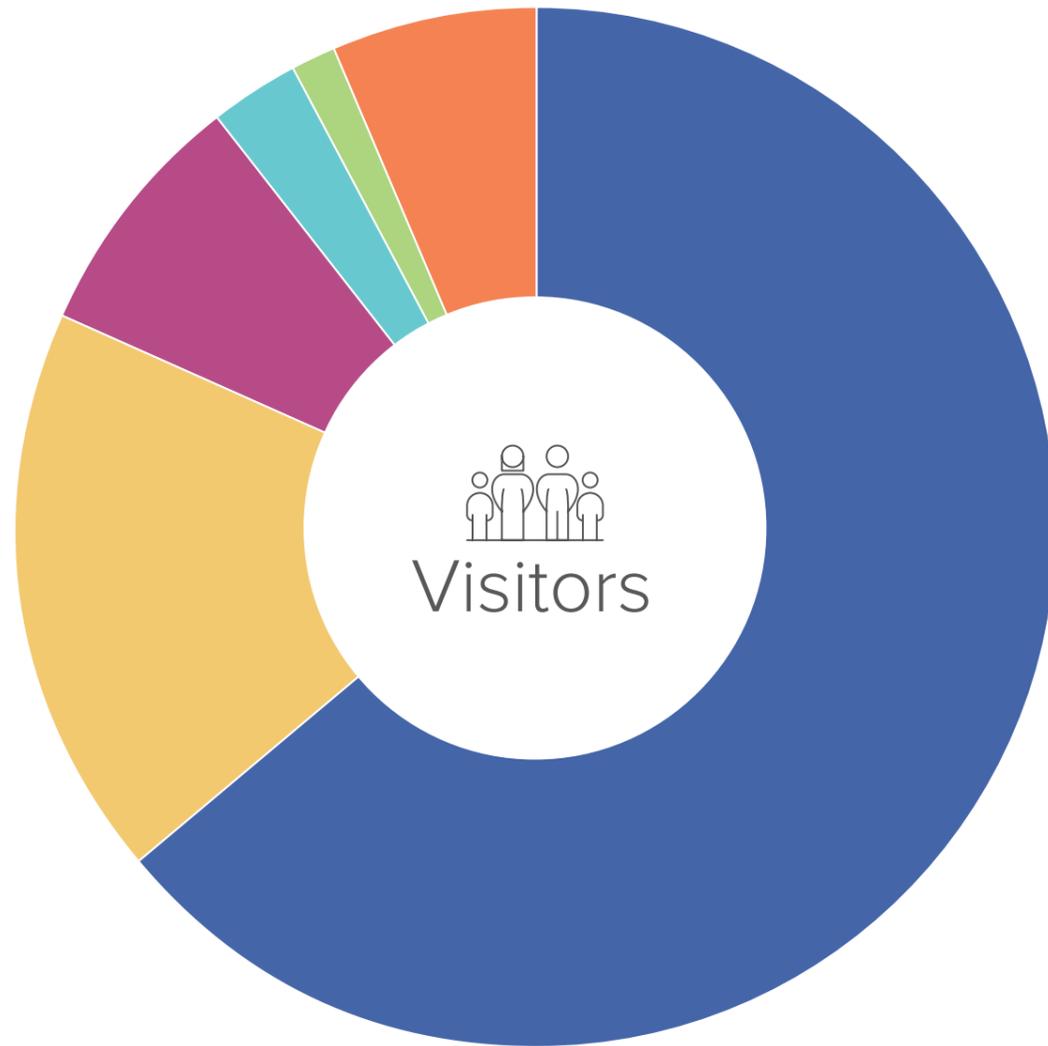


Our role is to promote tourism to and within Jersey in an innovative, economic and efficient way, delivering on our vision of a vibrant and sustainable tourism industry.

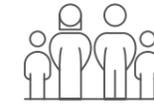
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2018 Highlights



Country	Number of Visitors	Total
UK	464,000	<h1>725,000</h1>
France	130,000	
Guernsey	55,000	
Germany	20,000	
Ireland	10,000	
Other	46,000	



Spent by visitors in the local economy
(best since 2011)

£268^m



Visitor nights spent on the island

£2.7^m



Staying leisure visitors

415,000



Visitor spend directly attributable
to Visit Jersey's work

£36.4^m



First time visitors (holiday & leisure)

48%



Total visitors (3% over 2017)

725,000



Tourist Information Centre customers
satisfied or very satisfied

86%



Referrals for our commercial partners
(23% increase)

952,000



Jersey.com page views

2.8^m



Travel trade partners supported

60⁺



Introduction

Tourism traverses our community, generates income, career opportunities and is supportive of social change. Marketing Jersey as a must-visit destination and the perfect stage for events, all year round, remains at the heart of what Visit Jersey does.

Tourism is rightly recognised for the ripple effect it has in bringing prosperity to our island and supporting other sectors of our island's economy. As an Arm's Length Organisation, Visit Jersey also has a responsibility to deliver against the Jersey Government's strategic priorities to help make Jersey a better place to live, work, visit and do business with.

I know the Visit Jersey board and executive team are working, in partnership with public sector entities and commercial businesses, to lead, support and contribute to the collective effort to build a productive competitive visitor economy.

As I reflect on another successful year for Visit Jersey and tourism to Jersey I look forward to yet more hard work and success. I would like to pay tribute to the Visit Jersey board, and the team at Visit Jersey and thank them for their hard work and dedication. I would also like to record my appreciation of so many in the tourism and hospitality industry who have played significant roles in our tourism's success.

I look forward to supporting Visit Jersey, and the industry, to build a vibrant and sustainable visitor economy into the future.

Senator Lyndon Farnham

Deputy Chief Minister, Minister for Economic Development, Tourism, Sport and Culture

May 2019

CEO Statement

This is my fourth year as CEO of Visit Jersey since we began trading from March 2015. Jersey is an extraordinary place to reconnect and revitalise. Thanks to all the hard work and determined efforts from all sectors of the visitor economy, the community, voluntary and charity bodies and the Government of Jersey, in 2018, we were able to increase visitor arrivals and spend. 725,000 visitors spent £268m, up 3% and 10% respectively.

Our role is to promote tourism to and within Jersey in an innovative, economic and efficient way, delivering on our vision of a vibrant and sustainable tourism industry. Over the longer term our priorities are to:

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

Simply put our vision is to help the world fall in love with Jersey and Jersey fall in love with tourism.

Throughout the year, Visit Jersey worked hand in hand with the Government of Jersey, our on-island suppliers and travel trade partners to roll out marketing, trade and product programmes aimed to enhance our visitors' experiences starting from dreaming about travel, to choosing Jersey as their destination through to sharing happy memories with friends and relatives during and after visiting.

Jersey is fortunate because we have a loyal base of visitors who enjoy coming back to Jersey, mostly in summer for week-long breaks. We worked hard to remind this group why Jersey is a great holiday destination, much of this in partnership with travel agents and tour operators in the UK, Jersey and Germany.

We are also determined to extend the holiday season beyond just the summer months. Our short break campaigns targeted off-season travel and in 2018, we achieved a 1% growth in holiday visitors outside April to September, which represented 23% of all holiday visitors.

Visit Jersey is in the business of giving potential visitors more reasons to book trips to Jersey. We inspire an interest in Jersey using Visit Jersey's digital and PR communication platforms. Jersey is an island of rediscovery and we tell Jersey's story to a worldwide audience, spreading our message further using social media along with our jersey.com site which recorded 2.8 million-page views in 2018. Our PR work generated over 1,100 articles in 2018. We teamed up with over 60 travel trade partners based in the Channel Islands, UK, Ireland, France, Germany, The Netherlands, Austria and Switzerland. We partnered with over 35 suppliers including hotels, airlines, attractions, retail, bars and restaurants to deliver great experiences and offers for visitors.

Our four seasonal campaigns; Love Winter, Spring Campaign, Autumn Unfiltered, and Summer - how do you want to feel? delivered a combined return on investment (ROI) of 7.6:1.

We cannot stand still, there are lots of destinations vying for the attention of visitors. Our product team worked with hospitality and tourism providers throughout 2018 to ensure the experiences visitors received were satisfying ones. The aim is that every visitor wants to return to Jersey again and recommend it to their friends and relatives. Building on the Kantar TNS and Island Global project (interviewed leisure visitors to Jersey to explore their experiences) and the Colliers International audit (looking at tourism products in Jersey and how these relate to what is found in other geographies) we created a Product Action Group to help steer further improvements in Jersey's tourism assets. Work has also started on defining and strengthening Jersey's "signature experiences", meaning we can keep pace with our visitors' expectations when on holiday or visiting for business or attending an event.

Our Tourist Information Centre (TIC), relocated to the Liberty Bus terminal, and continued to provide world class information support. Over 86% of those helped were satisfied/very satisfied with the help provided. The What's On guide and Jersey Map, available at the ports of entry, the TIC and other tourism venues continue to score very highly with our visitors; 86% expressed satisfaction/very satisfied with the brochures and maps used.

Over the course of the year, we promoted Jersey in a number of unusual ways including our Kilted Yoga initiative to celebrate the new easyJet Edinburgh to Jersey route; in 2018 over 200,000 views of the video were noted as well as excellent growth in Scottish visitor numbers; 29,800 visitors returned to a Scottish airport, a 37% increase on 2017.

The team at Visit Jersey put considerable effort to ensure Jersey is much more than just a destination; it is a place that's waiting to be explored, an island of natural beauty full of unspoilt coastline, heroic castles and a place that visitors can revitalise in the fresh sea air. Memories of Jersey are reflected in the way visitors have shared more than 30,000 images and videos from their Jersey trips through #theislandbreak on Instagram.

A healthy, vibrant visitor economy that continues to evolve in a sustainable manner depends upon the united efforts of so many people and organisations. Thanks to the £5 million grant from the Government of Jersey in 2018, we were able to market Jersey year-round and support our suppliers in a number of ways such as providing almost 1 million sales referrals to businesses from jersey.com (up 23% year on year), subsidising their attendance at travel exhibitions such as ITB Berlin- the world's leading travel trade show and providing a free-to-list service on jersey.com. Additionally, some suppliers joined our Gold-Silver-Bronze programme which delivered an enhanced set of services. We also provided accommodation and

infrastructure support to John Garton, CEO of Genuine Jersey in 2018.

None of these mentioned initiatives would have been possible without the unstinting support of the Government of Jersey, our suppliers and trade partners, and the people of Jersey. I would also like to thank members of the Visit Jersey board for their guidance and support, and my colleagues for their passion, dedication and hard work.

We welcome the finding from The Comptroller and Auditor General's 2018 Review of Visit Jersey and will be working with colleagues from the Government of Jersey to implement the recommendations.

Our visitor economy is moving in the direction of 1 million visitors spending £500m by 2030. There will be bumps along the way. But the evidence of the last four years can give us all confidence that Jersey is bouncing back. With our unity, our ingenuity, our passion and our Jersey spirit, I am confident that we will seize the opportunities ahead and cement Jersey as #theislandbreak for all seasons.

Keith Beecham
CEO, Visit Jersey
May 2019



The Tourism Landscape in 2018

Back in 2010 the United Nations World Tourism Organisation (UNWTO) forecast that by 2020 there would be 1.4 billion international tourism trips – latest estimates indicate that this forecast was achieved two years early thanks to a series of ‘above-trend’ years of growth. The strong global economic growth that helped to deliver the rosy tourism outcome is beginning to wane, with fears that even Germany might see negligible or even negative growth in 2019. The upshot of this is that the UNWTO’s panel of experts is forecasting that 2019 will see international tourism expand at a rate much more in line with its historic average of between 3% and 4%.

Looking more closely at Europe’s tourism performance in 2018 two broad themes emerge. Firstly, there was the long hot summer across much of the continent which helped cement strong performances in traditional tourist hot-spots such as France, but also in destinations such as Belgium, Germany and the Netherlands, with increases not just in inbound tourism but also domestic travel. The second broad theme was that despite growing trip volumes, downward pressure on fares and upward movements in the price of oil, resulted in an exceptionally challenging year for many of Europe’s airlines. Cobalt, Primera, Privatair SA and SkyWork Airlines are among the airlines to have ceased flying during 2018, with the latter having served Jersey from Berne for a number of years.

Adding to the headwinds is the continued uncertainty brought about by the Brexit process, which is one of the reasons Flybe gave for its 1p-per-share take-over by the Connect Airways consortium.

Two-in-three visitors to Jersey are from the UK and therefore it is of particular importance that the UK economy performs well and that consumers feel sufficiently upbeat to commit to booking holidays. The good news is that plenty of research has shown that Brits will forego almost everything else before they stop taking their holidays. But this same research shows that at times of financial stress they adjust their holiday plans, perhaps going away for fewer nights for example. They will also be focused on choosing destinations that offer value for money.

The exact complexion of Brexit remains a mystery at the time of writing and for much of the past two years the pound has traded at around €1.15. You don’t have to search hard to find an analyst who reckons a ‘no deal’ scenario will result in a rate of €0.95 to the pound, whereas a deal, particularly one seeing a ‘softer’ form of Brexit could lead to an exchange rate of €1.35. This matters for tourism to Jersey since the former would make going to a Eurozone destination considerably more expensive for Brits; sterling-denominated jurisdictions would however be better priced than those in Europe. The latter foreign exchange movement would have the reverse impact.

As such, in the coming year Jersey could see our price-competitiveness falling or rising. This means that all those who help shape Jersey’s tourism offer will need to be flexible; ready to grasp opportunities and countering any threats that Brexit might bring about.

Our Operating Environment 2018

We wrote in last year's report that "Brexit moved sluggishly forward, Trump continued to hog the headlines, exchange rates yoyo-ed and acts of violence were witnessed across the world's metropolitan centres". One year on and it seems like groundhog day. Jersey witnessed a 3% growth in visitors and a 10% increase in spend to £268m in 2018. By comparison the UK inbound market shrank 4% to 37.8m visits and spend at £22.7b was down by 7%. Brits going overseas were down 1% to 72m but their spend rose 2% to £46b (VisitBritain data). The future may be uncertain and consumers somewhat cautious but despite this, people will keep travelling. The task for Jersey is to remain relevant and appealing in 2019.

The Jersey Destination Plan, initially published in the autumn of 2015, set out how collectively our island's tourism businesses and other parties can capitalise on the tourism opportunity. In the autumn of 2018, the Council of Ministers agreed a set of strategic priorities - Common Strategic Policy 2018-2022. Following consultation with our industry partners and stakeholders, in the second half of 2018, a refreshed Plan was published in January 2019 business.jersey.com/jersey-destination-plan. This Plan sets out how we can together build a vibrant and sustainable tourism industry aligned to Government priorities.

The success of our visitor economy depends upon action on both the supply and demand side and the Jersey Destination Plan lists seven visitor economy performance KPIs and eight recommendations with suggested outcome measures.

Council of Ministers strategic priorities	How the visitor economy contributes to Government's priorities
Put children first	<ul style="list-style-type: none"> Sporting events inspire children to enjoy a healthy lifestyle, e.g. Kids Fun Run at the start of the Super League Triathlon, children's reading events during Festival of Words - all help with children's mental 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 8.3% of GVA and 12.6% of all employment in Jersey (Tourism Economics 2017 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

Visitor Economy Key Performance Indicators

KPIs	2030	2020	2017 (actual)
Visitor Economy GVA*	8.7%	8.7%	8.5%
Total visitors	1m	748,000	705,000
Visitor spend-nominal	£500m	£265m	£244m
Overnight holiday visitors	600,000	438,000	418,000
Seasonal spread; Share of overnight holiday visits outside April to September	28%	23%	21%
Island RevPAR**	£85	£75	£71
Net promoter score of visitors	55	48	47

* Gross Value Added. This is a measure, calculated by Tourism Economics, that measures the total economic impact of Tourism. These numbers need to be treated with care. 8.7% of a bigger more productive economy is preferable to say 10% of an economy that is shrinking, as Jersey has been since 2000.

** Island RevPAR: a widely accepted measure of revenue per available room.

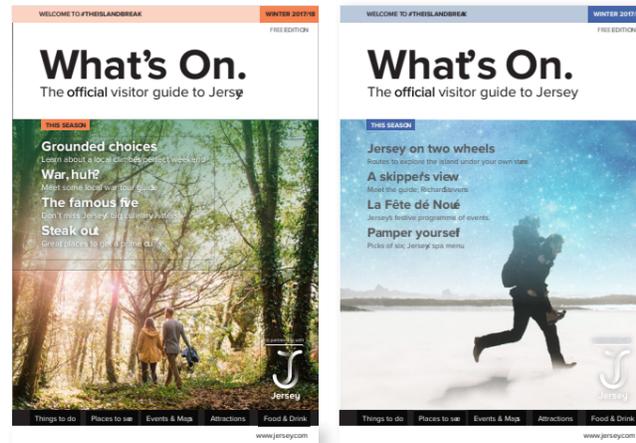
- 
Recommendation 1
 Grow a portfolio of markets that drives current opportunities and creates long-term growth in visits and spend
- 
Recommendation 2
 Help the world fall in love with Jersey
- 
Recommendation 3
 Sustain existing connectivity and introduce new routes
- 
Recommendation 4
 On-island experiences deliver to excellent standards
- 
Recommendation 5
 Develop a year-round visitor economy
- 
Recommendation 6
 Promote Channel Islands (where it makes sense)
- 
Recommendation 7
 Help visitors explore Jersey
- 
Recommendation 8
 Help Jersey fall in love with tourism

Our Island Welcome

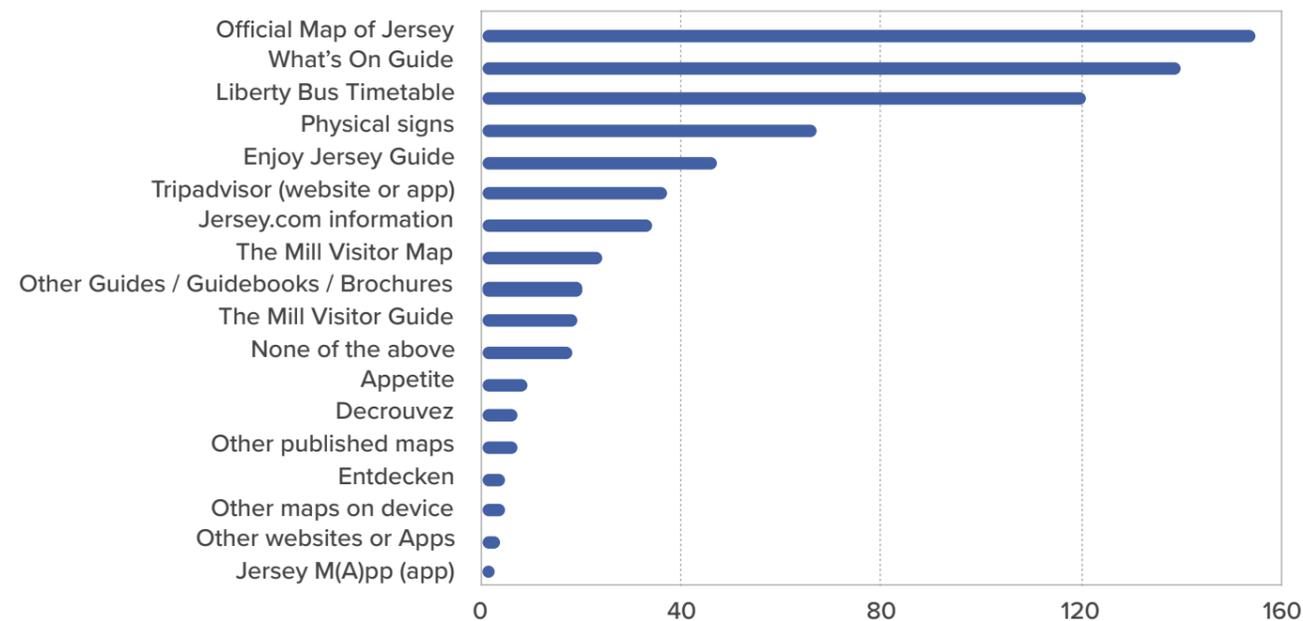
Our mission is promote tourism to and within Jersey in an innovative, economic and efficient way thus delivering on our vision of a vibrant sustainable tourism industry. We therefore provide information on-island to help visitors:

-  **Feel welcomed, and**
-  **Get more from their stay in Jersey**

On arrival at the Island's gateways, the What's On guide and official visitor map are displayed and free. Both publications are produced and distributed by third parties on behalf of Visit Jersey. These two publications remain the most used sources of information as the graph below shows. Complementing both publications, Visit Jersey produce additional guides in French and German, as well as an accessibility guide.



Sources of Information Used in Jersey



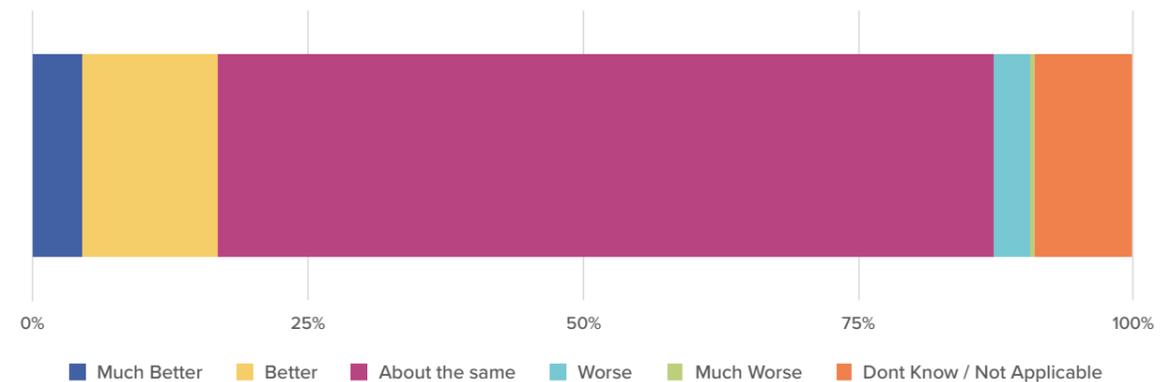
Tourist Information Centre

A physical Tourist Information Centre (TIC) continues to remain an important way for a destination to help visitors enjoy their stays, as the table below illustrates. In April 2018 we relocated the TIC to the Liberation Bus Station, where visitors receive award winning customer servicing provided by Liberty Bus staff on behalf of Visit Jersey. The TIC gives visitors friendly and welcoming face to face advice. During Summer 2018 staff began using hand held tablets to record daily interactions with their customers; over 16,700 interactions were recorded between July to December. This data help the TIC staff and Visit Jersey understand our visitor needs better and improve our decision making.



All visitors are unique; they have differing information needs depending on the length of their stay, how they plan to travel around the island, their knowledge of English and whether they have visited the island before, etc. Over the past 12 months, Visit Jersey carried out studies in the UK, France and Germany to help us better understand visitor information needs once they arrive at their destination. We also undertook research at the current TIC to explore the types of information that visitors value and use.

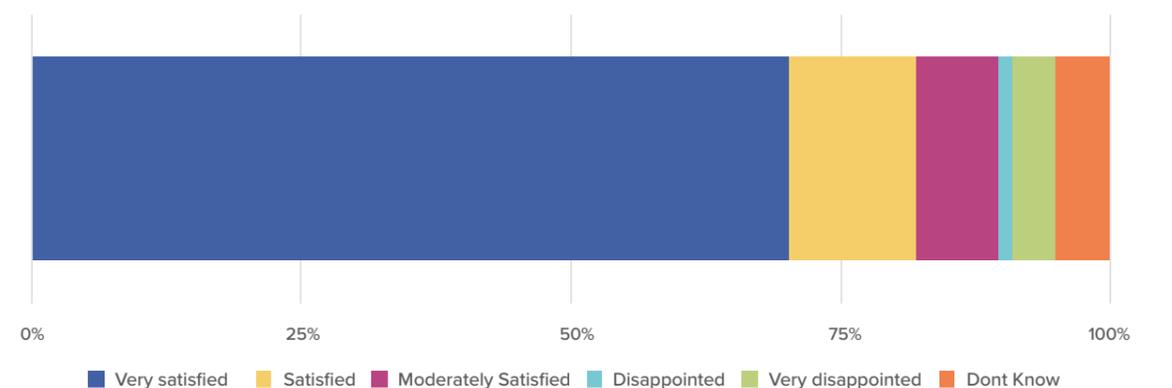
How Visitor Information Compares to Other Areas

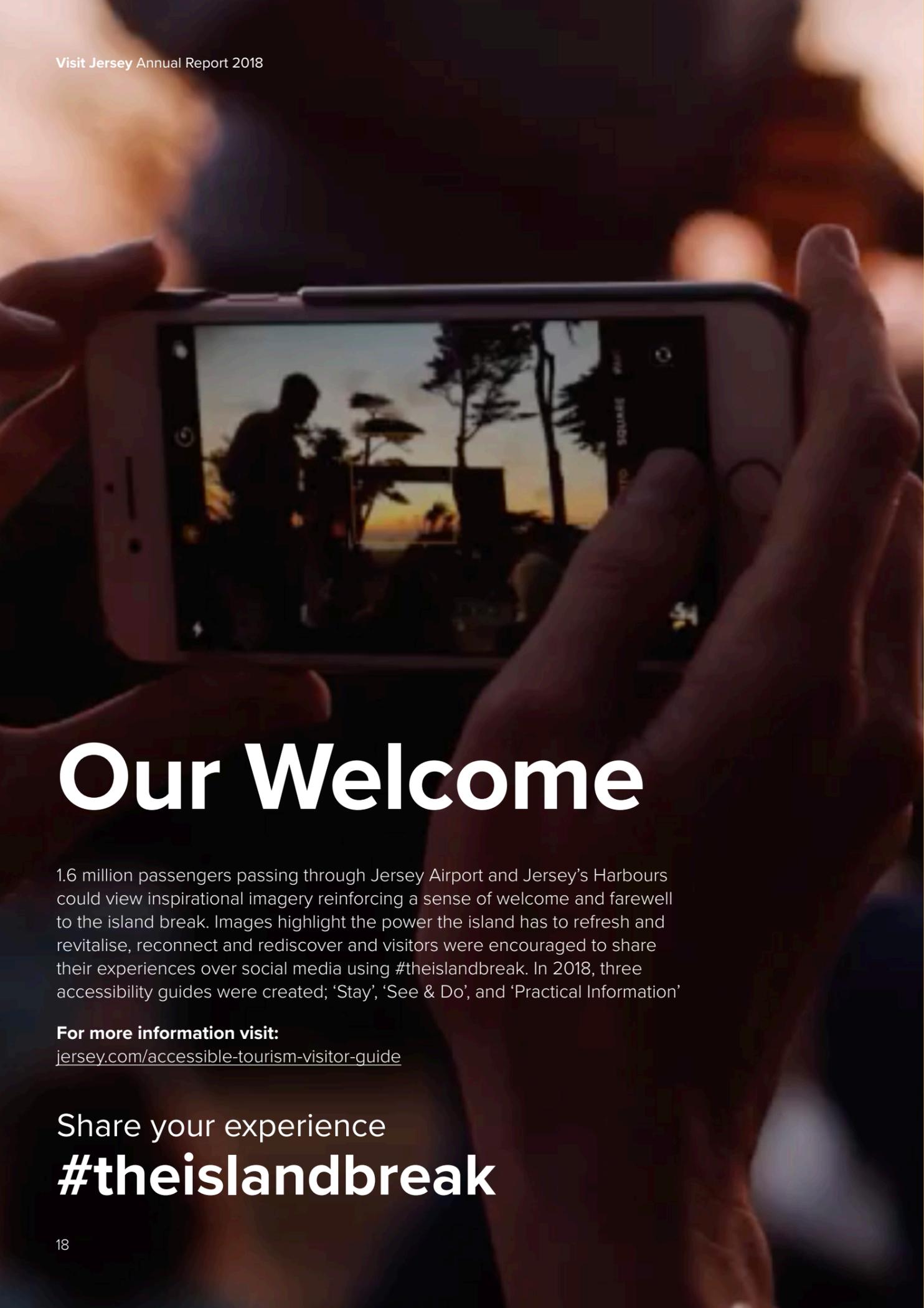


19% of those expressing a view said visitor information was better in Jersey than in other destinations they had visited in the past 2 years.

86% of people using the TIC were satisfied with the service.

Satisfaction with TIC





Our Welcome

1.6 million passengers passing through Jersey Airport and Jersey's Harbours could view inspirational imagery reinforcing a sense of welcome and farewell to the island break. Images highlight the power the island has to refresh and revitalise, reconnect and rediscover and visitors were encouraged to share their experiences over social media using #theislandbreak. In 2018, three accessibility guides were created; 'Stay', 'See & Do', and 'Practical Information'

For more information visit:

jersey.com/accessible-tourism-visitor-guide

Share your experience

#theislandbreak

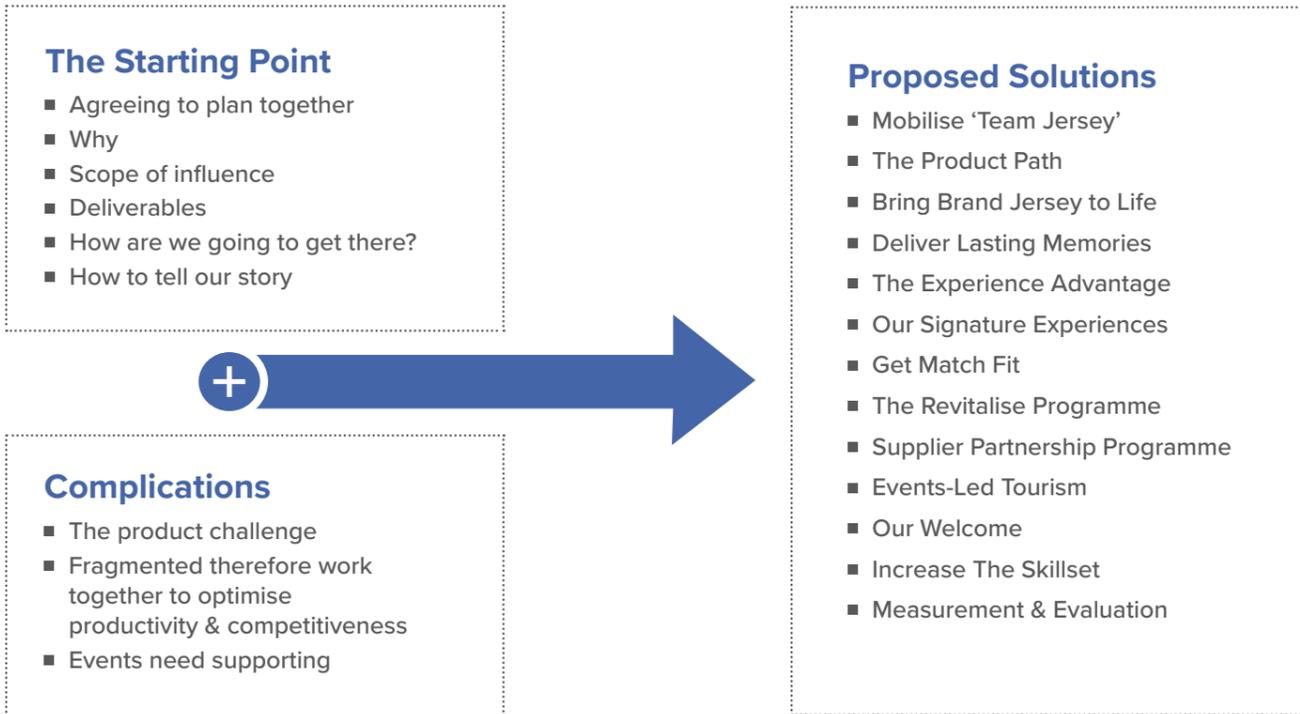
Supporting Our Industry

Product

Product Strategy



Our Approach



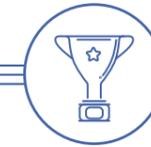
For more information visit: business.jersey.com/product-strategy

The Jersey Product Audit business.jersey.com/jersey-product-audit and the Visitor Experience Research business.jersey.com/visitor-experience-research informed this strategy.

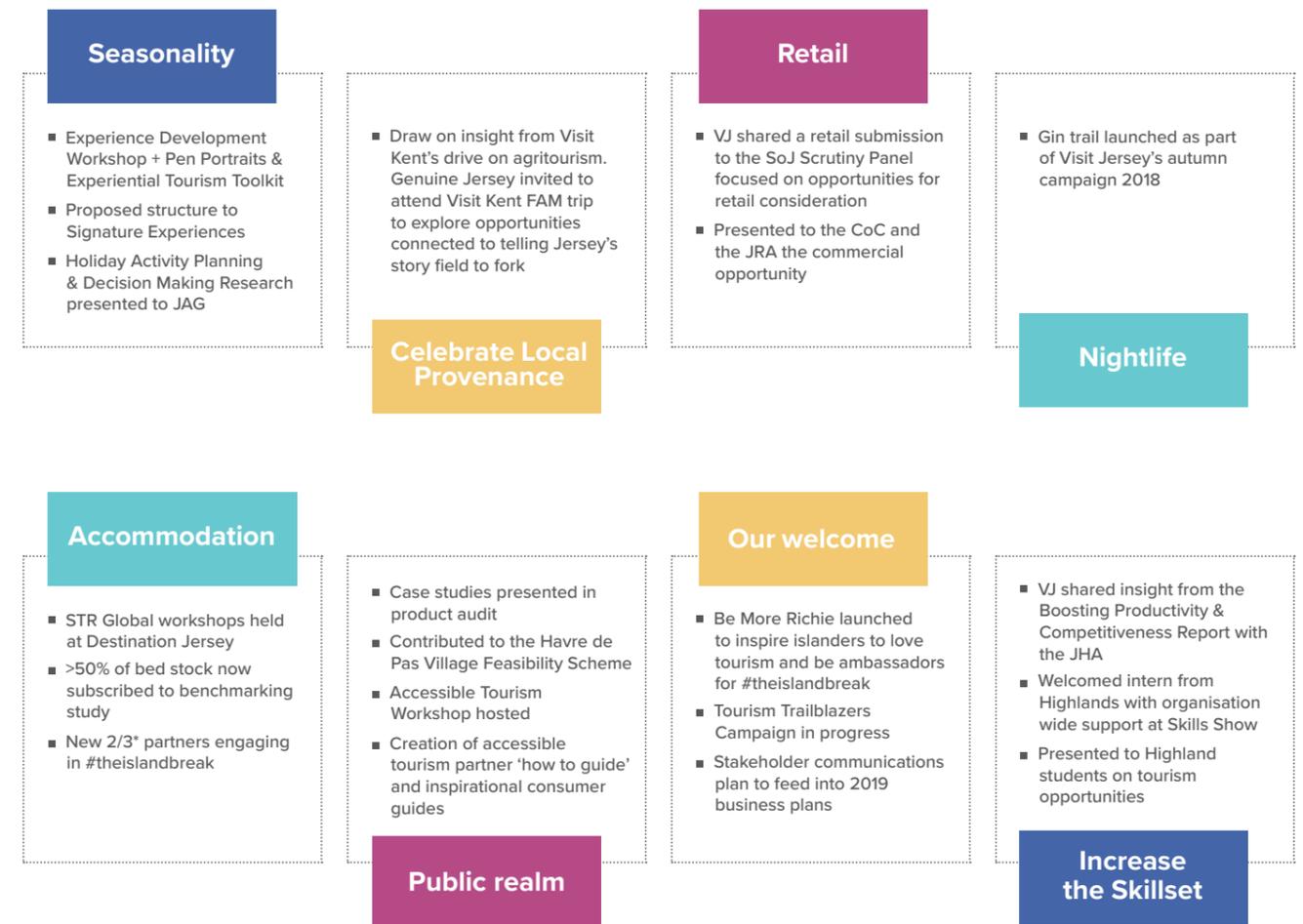
Product Action Group

Industry collaboration and commitment are crucial to the success of the Product Strategy, in order to address fragmentation, prioritise resources and recognise, strengthen and coordinate across different businesses.

The Product Action Group (PAG) was established in January 2018 with 25 industry stakeholders drawn from across private, public and the voluntary sectors. The PAG agreed a product roadmap. Achievements to date include:



Achievements So Far



The PAG reconvened in November 2018, to review progress visit: business.jersey.com/product-action-group

Get Match Fit - Inform, Educate and Work Alongside Partners

We continue to issue our bi-weekly industry newsletter, presenting product, trade and marketing opportunities as well as sharing key research and insights on the visitor economy.



Key Highlights

- 600 face-to-face partner meetings
- Accommodation providers were encouraged to adopt the internationally recognised AA accreditation programme
- Brilliant Basics Programme launched. “How to” guides to help partners get match fit on the themes of; Experiential Tourism, Social Media ‘Be More Richie’, Accessible Tourism, Accreditation and STR hotel benchmarking

Supplier Partnership Programme

Our on-island supplier partnership programme helps businesses promote their profiles through Visit Jersey’s consumer marketing channels.



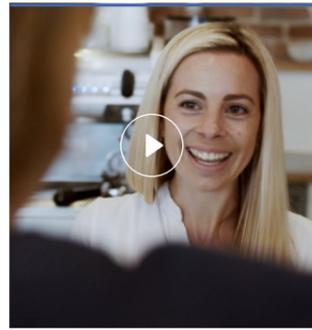
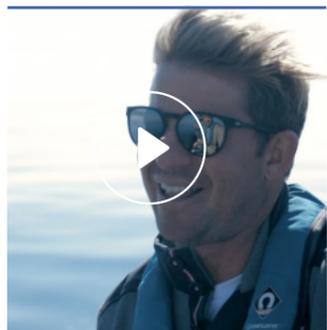
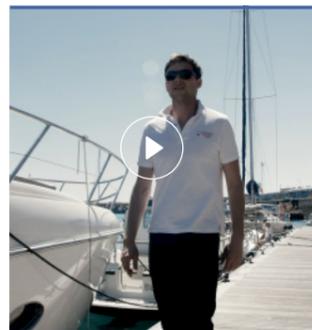
For more information visit: business.jersey.com/supplier-partnership-programme

“Being a Visit Jersey partner has been an important part of our digital marketing strategy, over a 12-month period it has helped drive over 15,000 referrals from jersey.com, re-marketing and email campaigns with a total booking value over £70,000.”

David Schofield,
Sales and Marketing Director, Les Ormes

Increasing the Skillset

To help inspire more people to consider the entrepreneurial opportunities available within Jersey’s tourism sector, four Tourism Trailblazer videos were produced and launched:

<p>Meet Debbie</p> <p>For every business, there’s a business founder. Debbie shares her experience within the hospitality world, taking her ideas from dream to reality.</p>		<p>Meet Lucy</p> <p>Ever since she was young Lucy wanted to set up her own café. after a long career down a different path Lucy finally followed her dreams, signed up to studying culinary arts, and set up her own health food café.</p>	
<p>Meet Rich</p> <p>Rich saw how Jersey’s coastline is so unique with the different tides, the hidden beaches, the sandbanks you can have to yourself, and realised no-one was really doing boat trips, so he seized the opportunity.</p>		<p>Meet Paul</p> <p>Paul had a vision to turn Jersey into a whole island experience, so he went on ebay and bought an open top bus.</p>	

The videos were shared by Jersey Hospitality Association, Highland’s College and Skills Jersey’s social networks.

For more information visit: business.jersey.com/tourism-trailblazers

Career opportunities in tourism and hospitality were shared at events including the Jersey Skills Show, Highlands Freshers fayre and at workshops in Highlands College. We also supported the Culinary Competition Heat 2018 organised by the Craft Guild of Chefs and Highlands College.

Events Jersey

Our ambition is to unleash Jersey's potential to win, host and deliver great events.

Filling the Island in the Shoulder Months

Working with event organisers, the aim is to help deliver experiences that generate and create lasting memories for event visitors, in line with the Jersey Product Strategy.

Business Events

An Events Jersey Strategy was launched in January business.jersey.com/events-strategy and an Events Jersey website events.jersey.com launched in February with inspirational experiences, case studies, a supplier and venue database, an events calendar and resources and itineraries for event organisers.

In May we appointed Hills Balfour MICE to support events business development. We have collectively generated 80 leads and engaged with new business event agencies such as TFI Group, Black Tomato Agency and Abercrombie & Kent.

Events Jersey attended a number of industry events including MeetGB, Confex International in partnership with The Radisson Blu, an Oysters Networking Event with 100 London-based MICE agencies, and M&IT Agency Challenge - two days of networking with 50 UK agencies.

On-island Events

Over 50 event organisers were helped with marketing and operational guidance. Signature events, such as the Breca Swimrun and Skipton Open Studios, were used as a product marketing hook to create reasons to 'book Jersey now'.

Examples:

jersey.com/jerseys-ultimate-adventure-events

jersey.com/skipton-open-studios

jersey.com/jersey-event-guide

Super League Triathlon

RBC Super League Triathlon returned to Jersey's waterfront on 28-30 September 2018.



55 of the world's best athletes



over 20% year-on-year growth of unique spectators



£527,000 benefit to the visitor economy

The Victory Lap presented opportunities for industry to get involved in SLT and create experiences to welcome visitors. events.jersey.com/why-jersey/success-stories/super-league-triathlon/

DTTT Campus

Events Jersey hosted the Digital Tourism Think Tank Campus in the autumn of 2018 with over 120 tourism marketing delegates from across the globe. They were here to explore, create, learn and apply the latest destination marketing trends, see the work undertaken by Visit Jersey and share their experiences. Delegates included Visit California, Cape Town Tourism, Singapore Tourism Board, as well as Paris Tourism, Visit Oslo and Switzerland Tourism. events.jersey.com/why-jersey/success-stories/digital-tourism-think-tank-campus

“It gave confidence that Visit Jersey was on the right trajectory”

Oliver Appleyard,
Group Marketing Manager, Seymour Hotels of Jersey

Marketing

Marketing Strategy



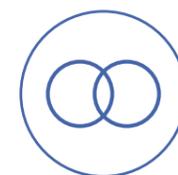
Bring brand Jersey to life

Leverage our new brand proposition to tell our island story that connects visitors to an emotive experience.



Capture, create & nurture visitor intimacy

Activate and engage visitors through relevant, breathtaking and personalised content.



Align best prospects to best channel

Right people, right place, right time, right message



Build partnerships

Distribute brand Jersey through partnerships with influencers, content creators, third party brands and travel partners.

Customers

UK				France			Germany	
Nurture 1	Nurture 2	Grow 1	Grow 2	Day Tripper	School Trips	Short Stay	Nurture 1	Grow 1
3.3m 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
Package preference	Both Package & Independent	Independent	Independent	Independent	Group	Independent	Package preference	Packaged & Independent
ABC1*	ABC1C2	ABC1	ABC1	ABC1	-	ABC1	ABC1	ABC1

*A demographic classification used to classify people maintained by the Market Research Society

Campaigns

During 2018 we rolled out seasonal marketing campaigns in the UK and France. A combination of creative videos and destination advertorials generated brand awareness and engagement which led to increased business for Jersey and our partners.



Love Winter

Targeting our Grow 1 and Grow 2 segments. Supported our strategy of attracting more visitors to Jersey in the shoulder seasons. The campaign conveyed 48 hours of winter drama in Jersey and the fizz of warming up in a cosy winter escape.

For more information visit:
jersey.com/lovewinter

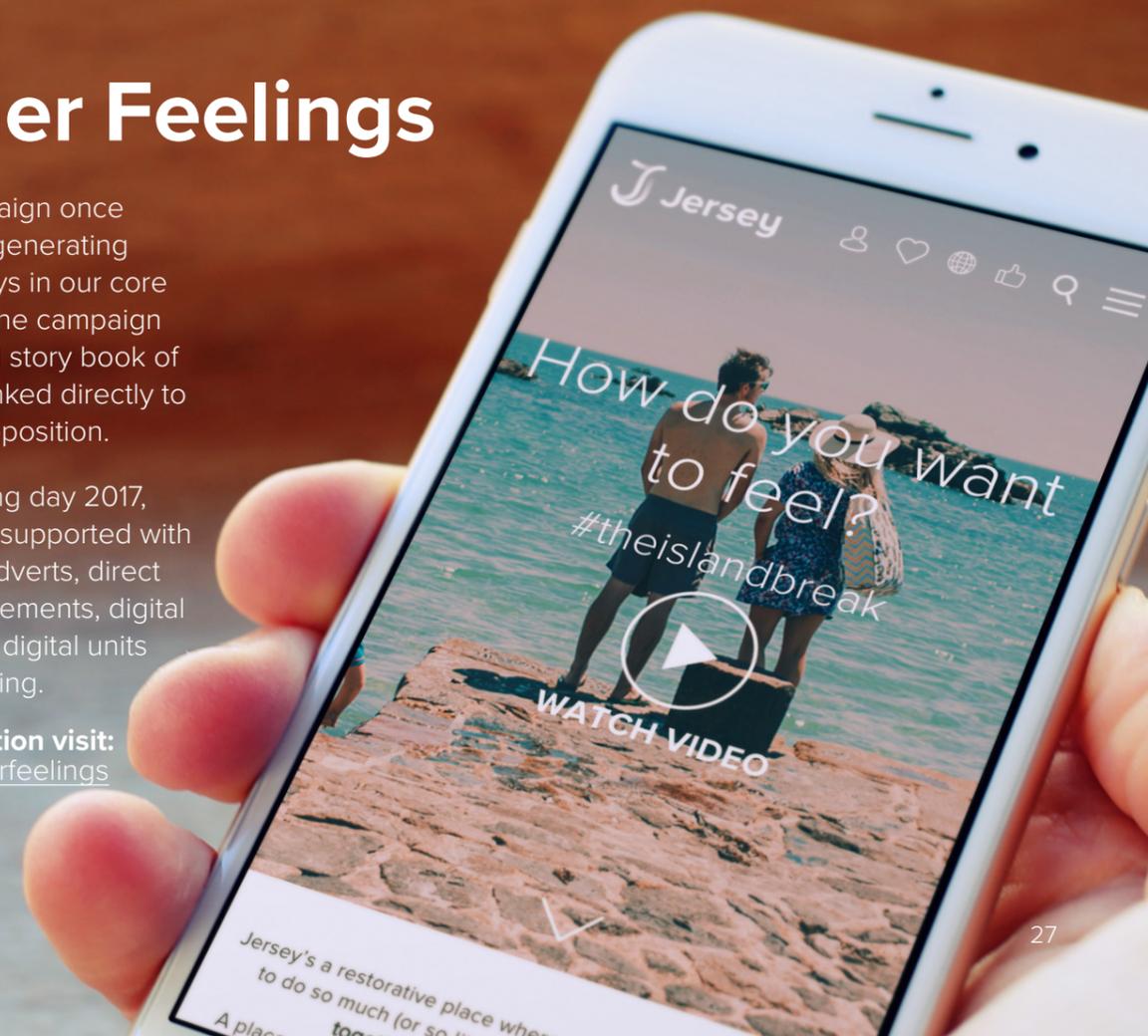


Summer Feelings

Our summer campaign once again focused on generating demand for holidays in our core summer months. The campaign developed a visual story book of positive feelings linked directly to our core brand proposition.

Launched on boxing day 2017, the campaign was supported with UK national print adverts, direct mail, pull-out supplements, digital display, interactive digital units and social advertising.

For more information visit:
jersey.com/summerfeelings

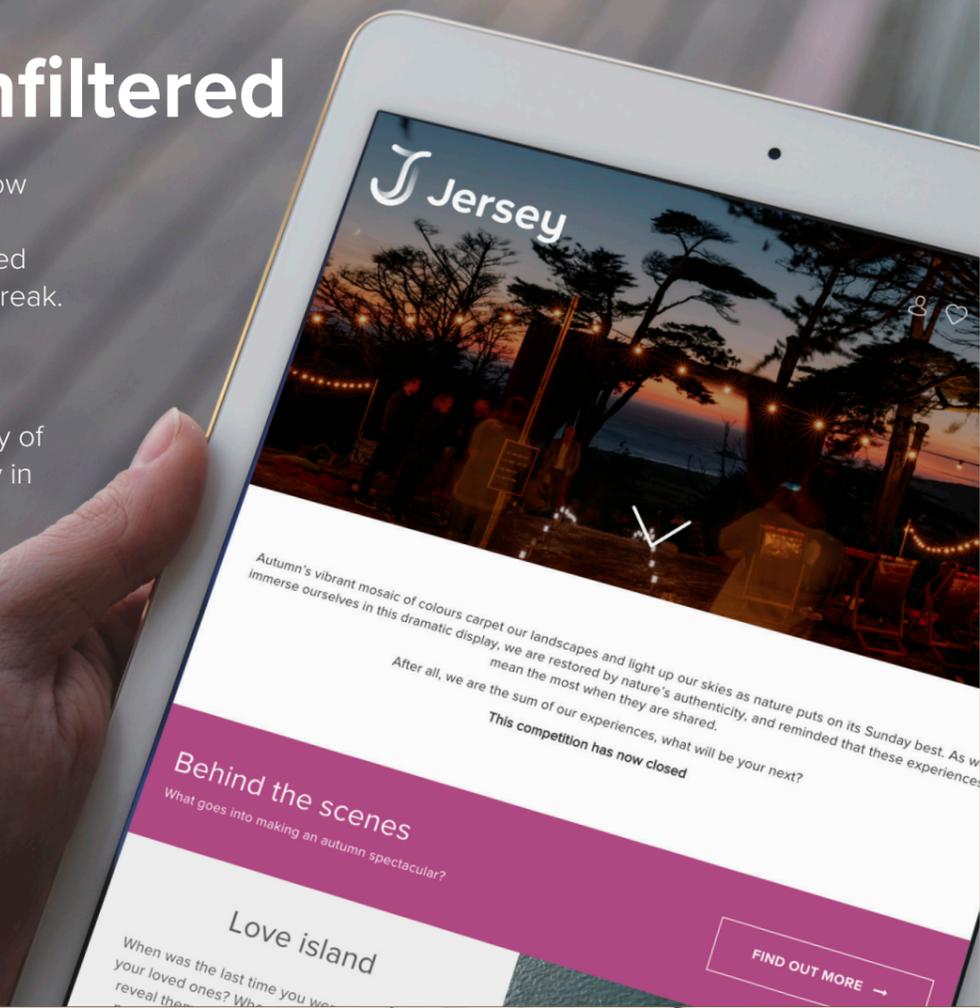


Autumn Unfiltered

Autumn unfiltered shared our slow move into Autumn; our dramatic sunsets and fire skies encouraged visitors to escape to the island break.

Targeting our Grow 1 and Grow 2 markets, 'Autumn Unfiltered' supported our long-term strategy of attracting more visitors to Jersey in the shoulder seasons.

For more information visit:
jersey.com/autumn-unfiltered



Bergerac Remastered

Ahead of the summer season, we wanted to further drive consideration for Jersey as a holiday destination by tapping into a well-known and well-loved link to the island; the BBC TV programme Bergerac. We partnered with an up-and-coming artist, Youngr, to embrace the nostalgia of the TV show and re-create its iconic track in a contemporary and unique way to reflect Jersey as it is today; 'Bergerac Remastered'.

For more information visit:
jersey.com/remastered



Kilted Yoga

Our kilted yoga campaign celebrated the launch of the new Edinburgh to Jersey easyJet route. The objective was to drive "talkability" for Jersey with a fun Scottish link. We partnered with the famous Kilted Yoga lads to create a short film entitled "Kilted Yoga, Jersey Edition".

The video showcased the spectacular, dramatic landscapes of Jersey and promoted the island in a cheeky and captivating way.

For more information visit:
jersey.com/kiltedyoga



Media Partners

Awareness

- The Telegraph
- The Observer
- EveningStandard.
- THE TIMES
- RMC DÉCOUVERTE
- The Guardian
- TimeOut

Digital Platform Partners

- Regital
- Adyoulike // INSKIN
- collective
- Sizmek Teads
- Silence.
- ffectv
- ADARA

Conversion

- easyJet
- Expedia
- lonely planet
- Newcastle International
- BRITISH AIRWAYS
- Condé Nast Traveler
- TRAVELZOO

2018 Overall Campaign Results



Incremental Website Sessions

278,136

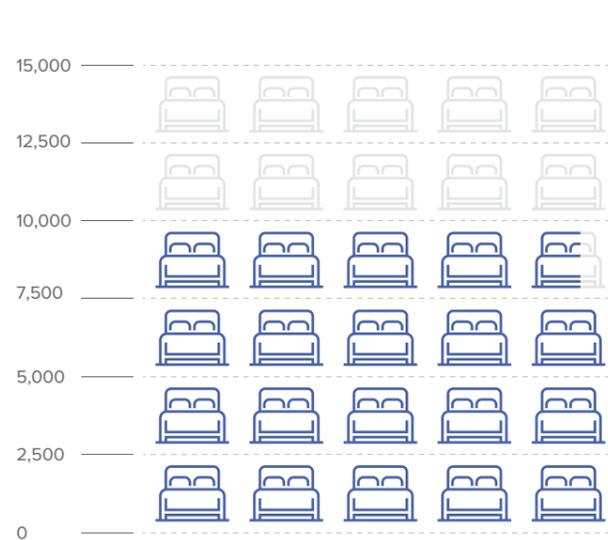


Data Captured

113,430

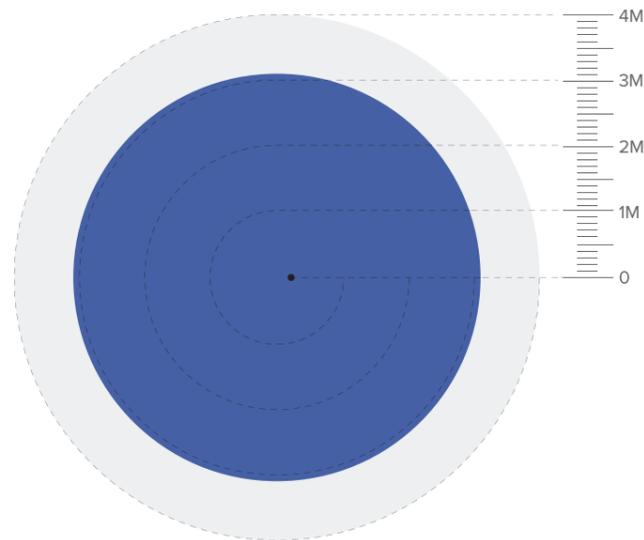
Outcomes

Bednights



376,000

Visitor Spend



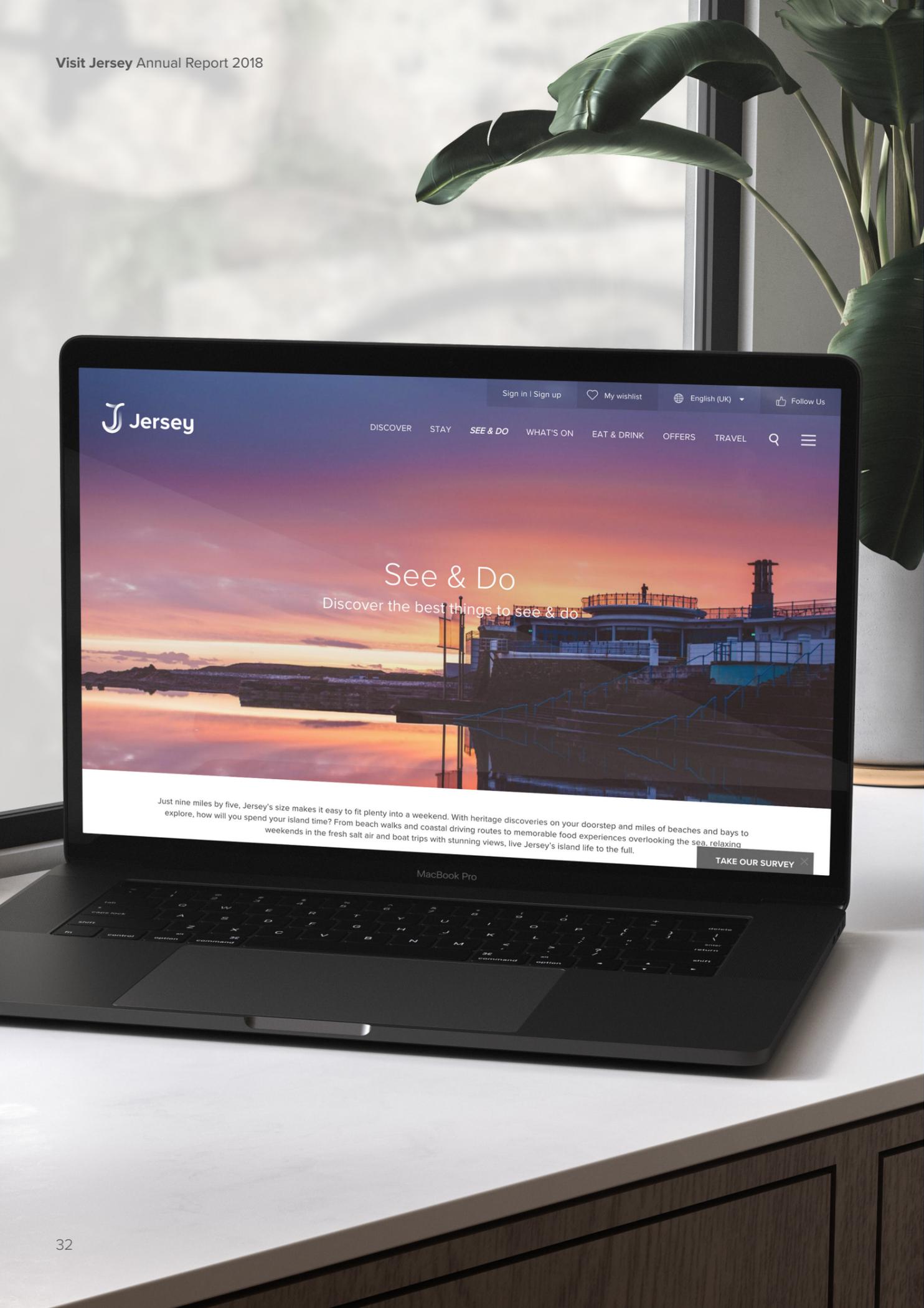
£36,440,000



ROI

7.6:1

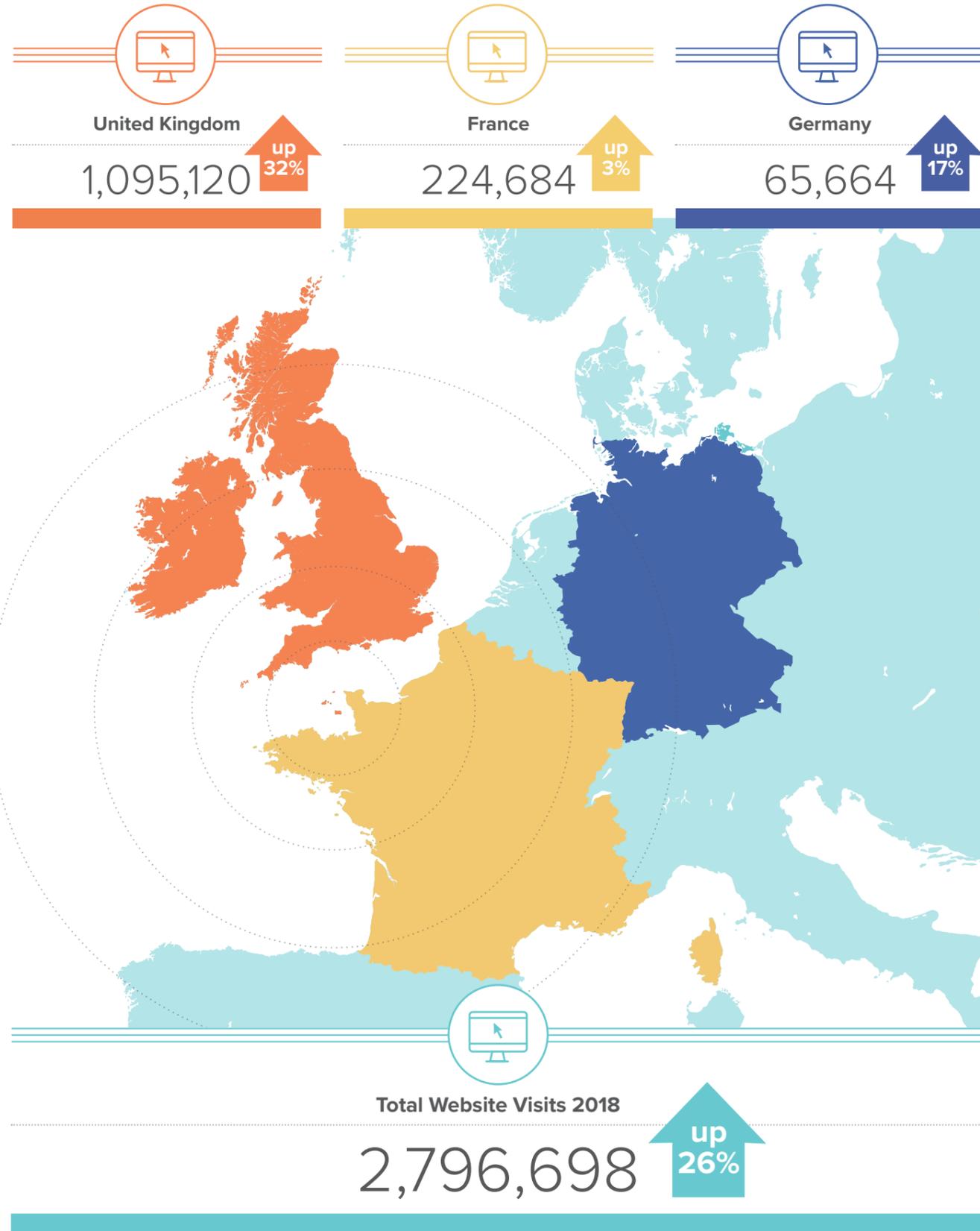




Jersey.com 2018 Highlights

During 2018 we launched Crowdriff User Generated Content on the website to showcase images and comments from locals, visitors and suppliers, we made sure our websites were General Data Protection Regulation compliant, we improved partner listings and reporting for food and beverage partners, and we introduced an enhanced See & Do category on the website for attractions, activities, shopping and wellbeing partners.

Website Visits



Outputs

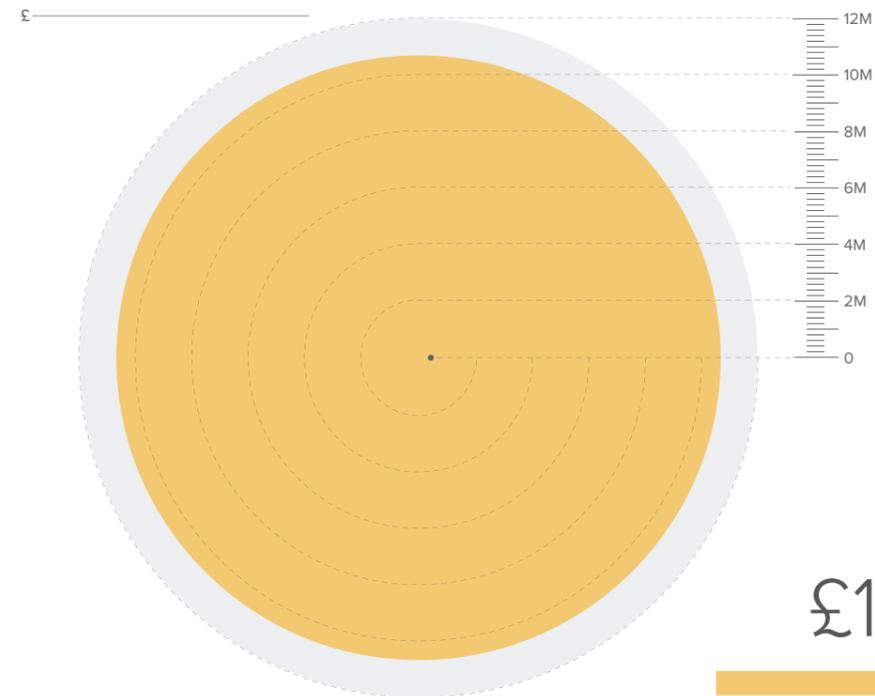
Bednights



102,775

Visitor Spend

More than 102,000 visitor nights and almost £10m of incremental visitor spending on the island can be attributed to the Visit Jersey consumer website.



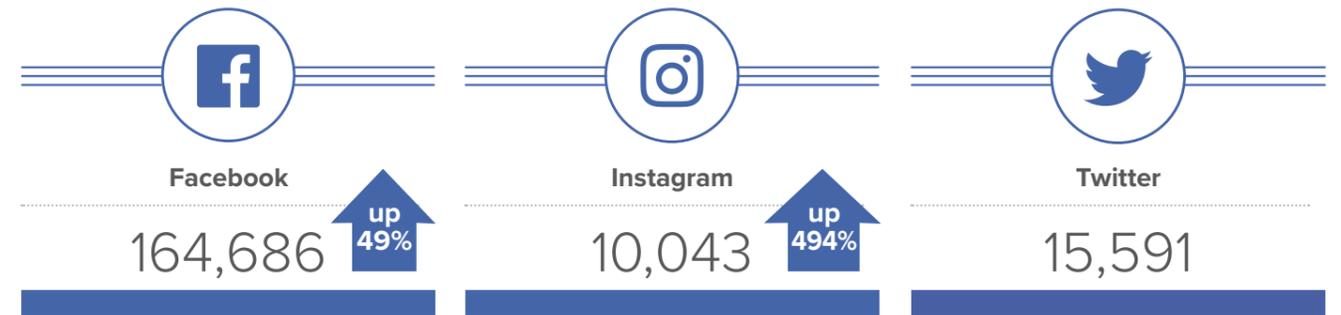
£10,318,636

Social Media

Our aim is to inspire visitors across our platforms to engage with #theislandbreak.

Social Media Traffic

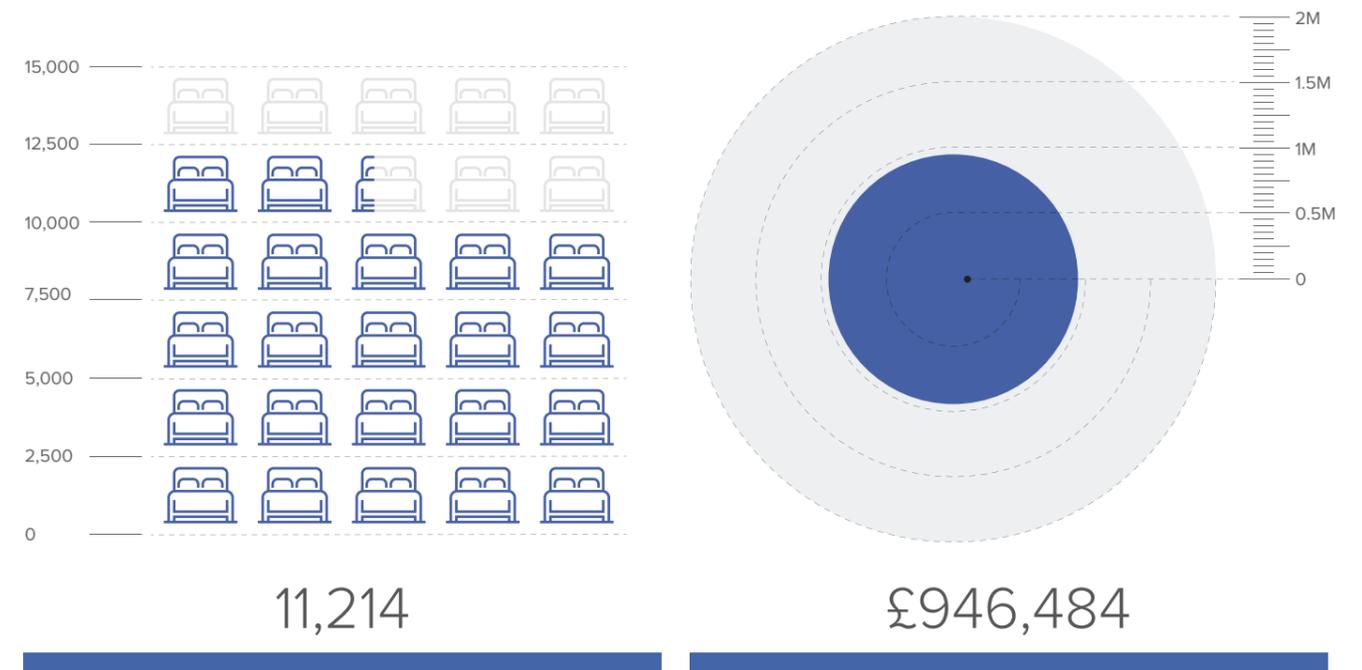
We delivered content to help inspire visitors to engage with #theislandbreak



Outcomes

Bednights

Visitor Spend



71% said that as a result of seeing our social media content they had talked to their friends and relatives about Jersey, and two-in-three felt that the content they saw was both 'Informative' and 'Appealing'.

Email Marketing

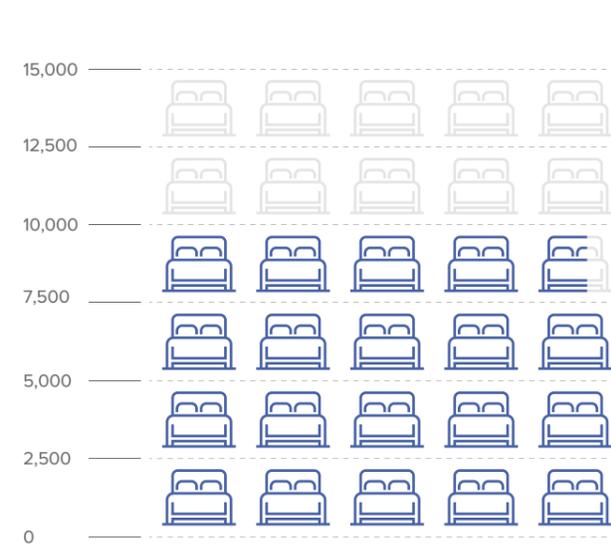
We continue to create and nurture relationships through personalised email content, collaborating with the industry on joint email marketing activities to strengthen our offer and provide better access to buying into Jersey experiences.

Outputs



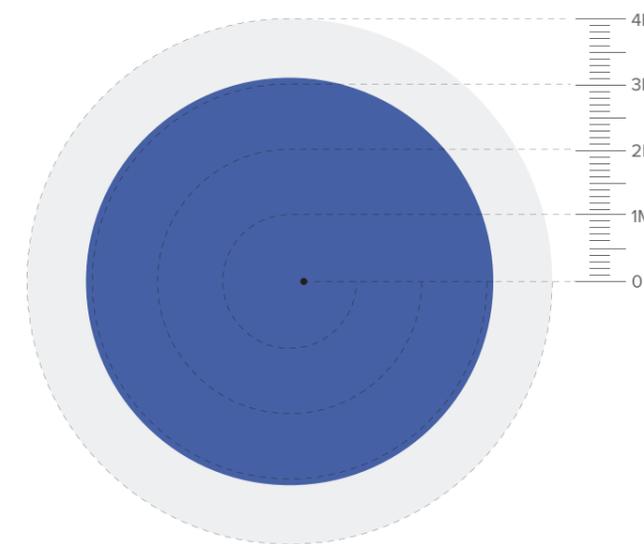
Outcomes

Bednights



9,816

Visitor Spend



£3,074,476



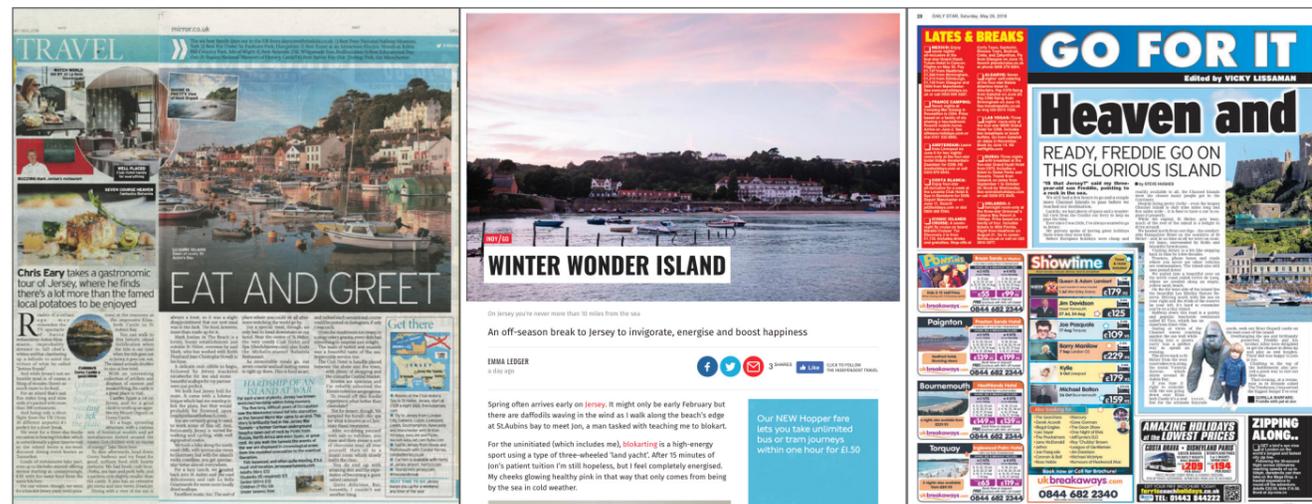
ROI

26:1



PR

We continue to run proactive PR campaigns to create noise and drive awareness of Jersey in target media. We craft world-class memorable media experiences that have given us the power to truly reach and inspire our desired audiences.



Daily Mirror (circ. 533,531)

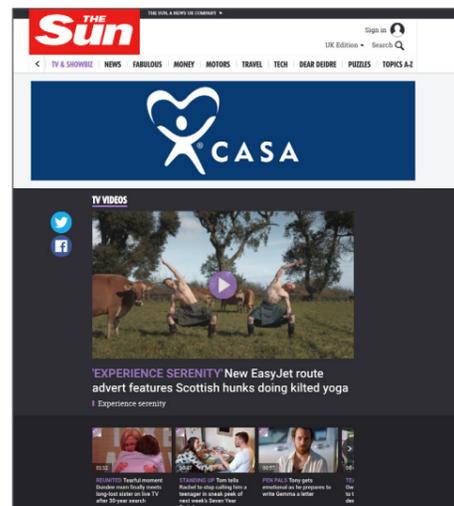
A mouth-watering gastronomic tour of Jersey enjoying the island's fresh produce. The double-page spread syndicated to Daily Express (circ. 327,011) and Daily Record (circ. 121,710).

Independent (circ 1,448,100)

An off-season feature to Jersey to invigorate, energise and boost happiness.

Daily Star (circ. 384,393)

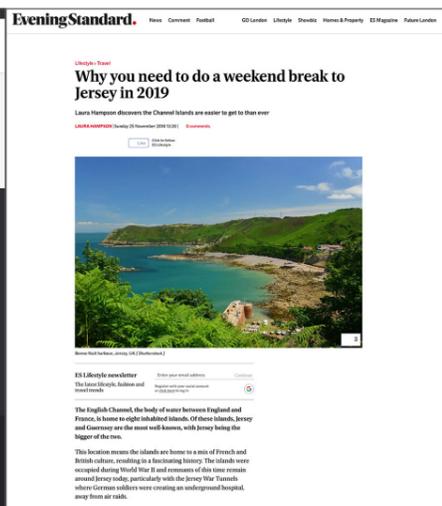
A guide to all Jersey, the nine by five mile island, has to offer.



The Sun (circ 2,453,333)

To celebrate the launch of the new Edinburgh to Jersey easyJet route and encourage Scots to book a trip to #theislandbreak.

Coverage syndicated to The Scottish Sun online (du.u 4,407) and The Irish Sun online (du.u 1,153,343).



Evening Standard (circ. 629,335)

A weekend guide to Jersey in 2019, discovering how the Channel Island is easier to get to than ever before.

The online article syndicated to Yahoo (du.u 1,456,666) and MSN (du.u 766,666).



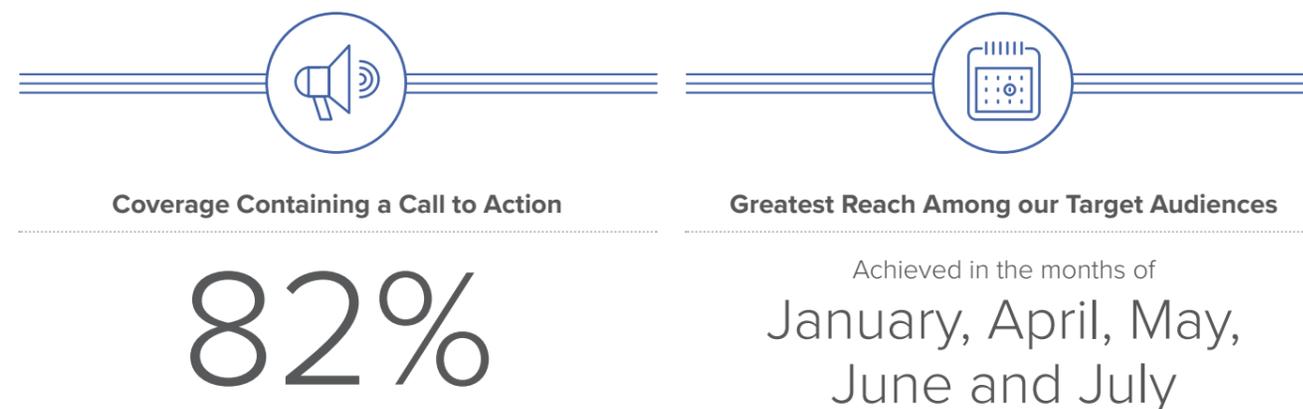
TV Life Magazine (circ. 239,897)

Crystal-clear waters, sandy beaches, excellent food, a double page spread heroing the countless reasons to visit Jersey.

Outputs



UK Outcomes



France

- 62 pieces of coverage generated, all of which were favourable
- 100% of coverage featured a call to action and key message

Germany

- 238 pieces of proactive coverage were generated, all of which were favourable
- 93% of coverage featured a key message, and 79% contained a call to action

Trade

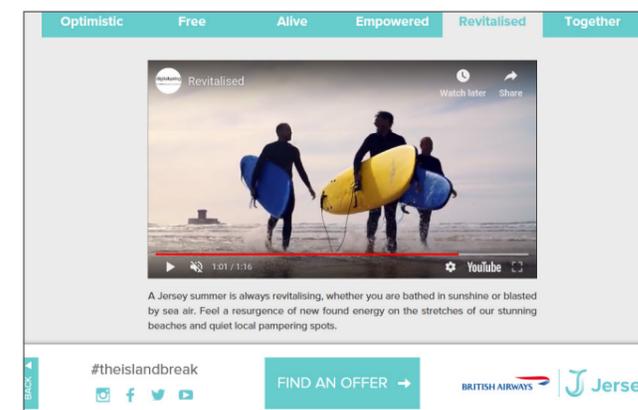
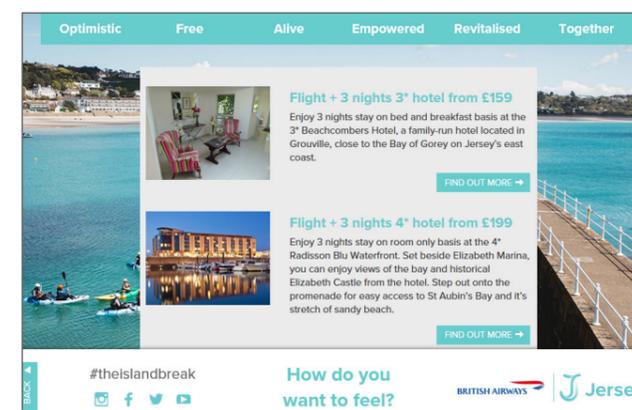
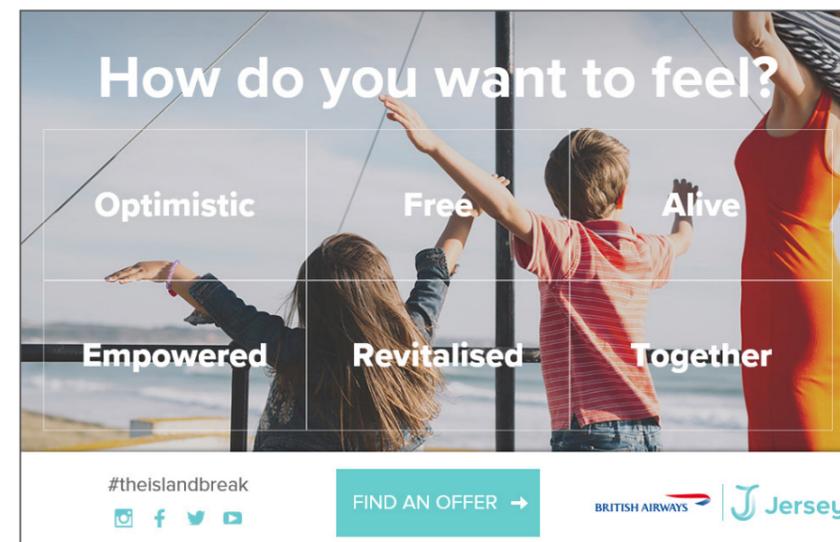
The Trade focus in 2018 was on building relations with our industry partners, finding ways to bring Jersey to a wider audience, and working to drive additional visitor volume and extend seasonality.

Trade Partner Audit

We carried out a trade partner audit in 2018 to better understand Jersey's product inclusion in travel programmes. The audit also helped to identify product gaps and highlight new trade partner opportunities. Of the 104 audited programmes, 46% featured Jersey. On average 5 hotels were represented per programme. Only 16% of those partners who did not feature Jersey, did offer a competitor destination.

Trade Partner Joint Marketing Campaigns

Visit Jersey worked jointly with tour operators, both Channel Island specialists and others, who have the potential to drive low season sales. In total we invested in 17 joint partnerships. Working with five partners on a new digital "lightbox" initiative, we raised destination awareness and drove traffic to our tour operators' websites.



Trade Events

Our trade and product teams cooperated to deliver the Destination Jersey Workshop, our biennial event on 23rd - 25th April 2018.

Record numbers attended and over 130 buyers from across Jersey's main markets joined.

First time participants included Travelbound, Lastminute.com, Barrhead and Travelmole.



2 Days



82 Suppliers



54 Tour Operators



Explore GB

This 2-day VisitBritain organised event provided Visit Jersey with an opportunity to present Jersey to 300 international buyers from 40 countries. We had 51 meetings with travel partners looking to extend, refresh and introduce Jersey. Visit Jersey sponsored the conference app; 698 registrants, 427 active users, and over 200 full views of Jersey videos.

ANTOR Meets the Trade

Visit Jersey presented to over 70 travel agents. Following the event, we invited agents to participate in our interactive online training.

Visit Jerseys Style Awards Education Visit for Agents

Visit Jersey hosted representatives from leading travel firms to the awards ceremony and arranged a luxury educational trip showcasing Jersey. We hosted five Travel Counsellor home-working agents, as well as representatives from Premier Holidays, TUI and Travelzoo.



“The trip exceeded my expectations and has given me a new-found knowledge to share with my staff and other staff in my region to help sell Jersey better in the future. Thank you for letting us experience your beautiful island”

TUI Travel Agent

World Travel Market

Visit Jersey hosted breakfast on the first day of WTM for six on-island partners and Condor Ferries together with 45 travel trade and media partners. Visit Jersey went on to meet trade partners over two days and, amongst other initiatives, worked on firming up 2019 European charters to Jersey.



Our Head of Trade was in front of the cameras, joining Travel Counsellors TV on the sofa for a Jersey product training session which reached 1,500 homeworkers.

The Island Break Training Programme

In April 2018 Visit Jersey launched 'The Island Break' training programme which aimed to improve salespeople's knowledge of Jersey. Participants progress through a range of training levels, each designed to showcase Jersey's offering, and win points along the way for the chance to join the ultimate trip to Jersey.

Successful agents came from Travel Counsellors, Travel Solutions, Premier Holidays, Wroxham Travel and Premier Travel Agents, who visited Jersey for their #theislandbreak.

Germany

Visit Jersey's activity was focused on supporting German travel industry partners, both airlines and tour operators. Activities helped sustain German, Swiss, Dutch and Austrian air charters and exploit flight capacity on scheduled routes. Joint marketing campaigns were developed with major tour operators such as DERTOUR, TUI Wolters, Wilkinge Reisen and the airline Eurowings. Marketing efforts were focused on areas of direct flights to Jersey; namely Berlin, Dusseldorf and Munich.

Marketing initiatives included on-line campaigns, social media posting, travel agency training, themed newsletters, as well as cross-channel campaigns with magazines such as Laviva. This initiative recorded one of the highest volumes of competition entries for Laviva ever at 38,620.

Visit Jersey jointly produced a Business to Business (B2B) counter brochure which was distributed to 8,000 of TUI's leading travel agents; 1,458 went on to participate in a Jersey competition.

We emailed 9,300 German travel agency recipients which generated a 41% open rate.

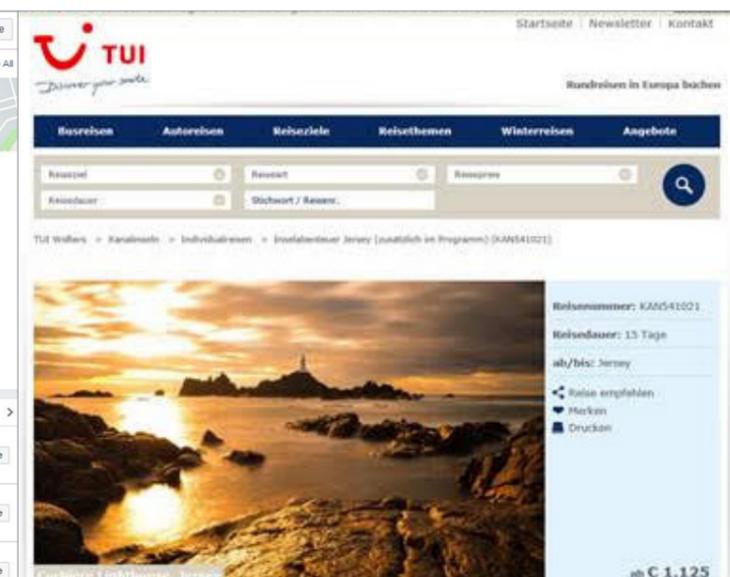
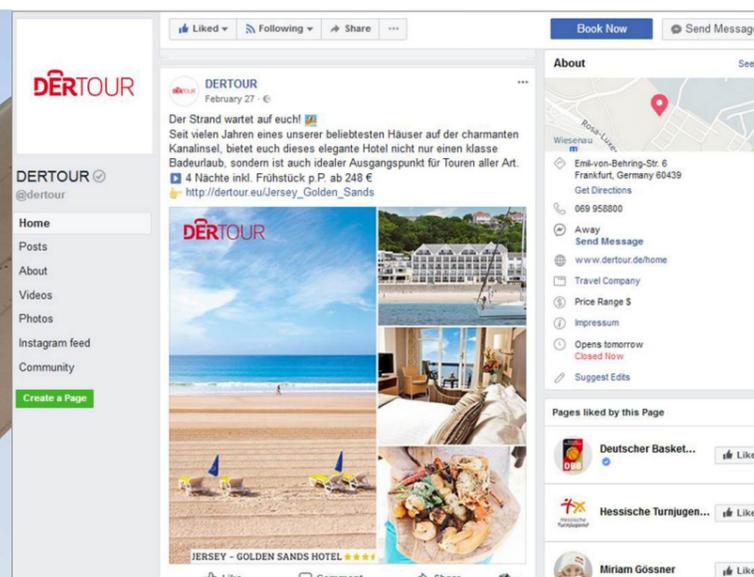
Eurowings, Lufthansa's low-cost carrier, in 2018 flew direct flights to Jersey from Dusseldorf, Hamburg, Berlin and Stuttgart. Visit Jersey agreed a joint initiative with them featuring webpages, online advertorial and standalone newsletters.

ITB Berlin 2018

Between 7th and 11th March 2018 Visit Jersey and Visit Guernsey hosted a Channel Island stand at ITB Berlin, the world's largest travel trade show. We were joined by Bontour Incoming, Dolan Hotels, Condor Ferries, Hand Picked Hotels, Hotel de France, Radisson Blu, Seymour Hotels, The Modern Hotels, The Atlantic Hotel and The Duke of Richmond.

Over 40 Trade and media appointments were completed.

Visit Jersey went on to meet trade partners over two days and, amongst other initiatives, worked on firming up 2019 European charters to Jersey.



This initiative recorded one of the highest volumes of competition entries for Laviva ever at 38,620

Ihre Inselauszeit auf Jersey!

Wer einmal hierher kommt, möchte gar nicht wieder weg. Die britische Kanalinsel Jersey verdient ein ganz besonderes Plätzchen mit ihrer vom Meer geformten Küste, dem milden Klima und den entzückenden Orten. Hier können Sie durchatmen und sich vom Alltagsstress erholen. Auf Sie warten herrliche Strände, herrliche Aussichtspunkte, alte Festungen sowie Restaurants mit regionalen Köstlichkeiten. Haben wir Ihre Aufmerksamkeit geweckt? Dann machen Sie mit bei unserem Gewinnspiel und fliegen Sie zu zweit für eine Woche hin! Wir wünschen Ihnen viel Glück - und dann eine wunderbare Zeit vor Ort.

DERTOUR und LAVIVA verlosen eine Reise nach Jersey für zwei Personen, inklusive Flug und sieben Übernachtungen (DZ mit Frühstück) im Mittelklassehotel. Einlösbar bis September 2018. Schicken Sie einfach eine Postkarte mit dem Kennwort "Jersey" an LAVIVA, 20578 Hamburg. Oder machen Sie hier online mit.

Teilnahmechluss: 15. Mai 2018

MITMACHEN

*Teilnahmebedingungen



Evaluation

How do we measure the difference we make?

Visitors come to Jersey for a host of different reasons, some of which are influenced by Visit Jersey's activities, some of which are not. Recognising this fact and being hungry to understand how effective each of our interventions are, Visit Jersey ensures that it can measure the effectiveness of its activities through the deployment of an evaluation methodology that is widely adopted by tourist boards, has been rubber-stamped by the UK National Audit Office, and that mirrors the UK Government Communications Service 'Standards and Guidelines'.

Historically many marketing organisations only talked about the 'outputs' of their activity, for example how many visitors there were to a website, or how many brochures were posted. While these are important metrics, they do not help us understand whether what we are doing is delivering on its ultimate goal, namely increasing the number of people who choose Jersey as a holiday destination who, without us having intervened, would not have done so.

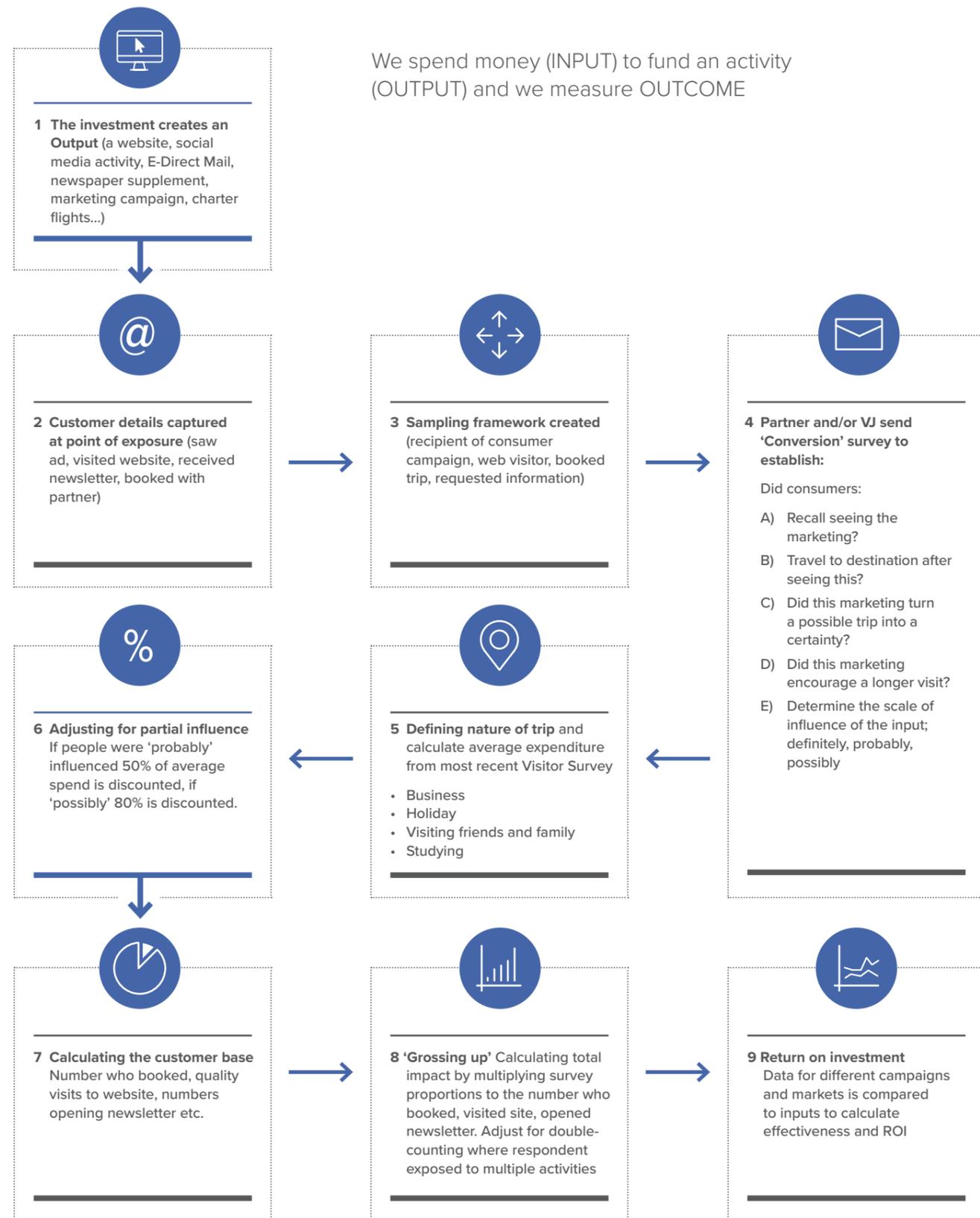
In broad terms our approach to measurement and evaluation is to ask a sample of those who come into contact with each of our activities about the impact that it had on them. This ranges from questions about:

- how it made them feel (what are called 'outtakes')
- what they did after interacting with our activities (intermediate outcomes)
- and crucially whether or not our activity turned a possible trip to Jersey into a certainty (final outcomes)

Visit Jersey always takes a cautious approach to evaluation to ensure we do not overclaim. For example, we make sure that we do not count anyone as having been influenced by our activities if they do not recall the activity, or had already committed to a trip before they became aware of the activity. We also give them the opportunity to tell us about the scale of our influence; ranging from it having 'definitely' played a role to 'none at all'.

The following diagram describes the key steps in evaluating our activities:

We spend money (INPUT) to fund an activity (OUTPUT) and we measure OUTCOME



Key Performance Indicators for 2018

Jersey visitor economy success results from the efforts of many - it's a joint enterprise. Visit Jersey is not directly accountable for achieving the visitor economy forecast but reports on progress against performance indicators. Visit Jersey is accountable for the Visit Jersey targets- through marketing, trade and product initiatives we deliver measurable outcomes.

2018 Visitor Economy	Forecast	Actual
Gross Value Added for hospitality sector	8.3%	8.5%
Total visitors	717,557	725,417
Staying Holiday visitors	434,888	414,679
Day Holiday visitors	71,800	66,215
Visitor spend-nominal	£256m	£268m
First time holiday visitors	52%	48%
Holiday visitors outside April to September	86,430	93,376
Island RevPAR	£73	£74
Net promoter score of visitors	49	55

Visit Jersey Targets	Targets	Actual
Marketing: ROI on grant	5:1	7.6:1
Travel Trade Partners Satisfaction (either 'very' or 'fairly satisfied')	66%	77%
On-island Supplier Partner Satisfaction (either 'very' or 'fairly satisfied')	66%	72%
Satisfaction with On-Island Information Provision	89%	86%

*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 £372m or 8.5% of whole economy output.

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

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

Our People

Our Board



Kevin C Keen
Chairman



Keith Beecham
Chief Executive



J D Bannister
Resigned
11 December 2018



P W Burke
Appointed
19 September 2018



T J Crowley



M A Graham



C R Leech



D R Seymour
Resigned
16 May 2018



S J Watts



A J Willmott
Appointed
16 May 2018

Our Executive Team as at March 2019



Keith Beecham
Chief Executive Officer



Rachel Winchurch
Executive Assistant to CEO



David Edwards
Head of Research
and Evaluation



Oliver Archbold
Head of Corporate Services



Louise Ashworth
Head of Marketing



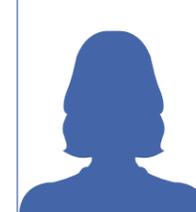
Meryl Laisney
Head of Product



Sarah Barton
Head of Trade



Lyndsey Soar
PR Executive
Job Share



Sophie Jeantils
Marketing Executive
Maternity cover



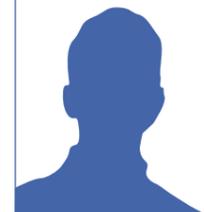
Ben Jordan
Campaign Executive



Jennie Smith
Product Executive



Charlie Watkins
Product Executive



Vacant
Events Executive



Sarah Richardson
Maternity Leave

Our Values

Connecting with visitors is our number one priority. Through everything we do, we generate demand by inspiring people to consider Jersey.

Ownership

We are accountable for our activity, continually striving to be professional, innovative and informed, but we learn from our mistakes and listen to feedback.

Customer Focused

We keep the customer at the centre of our thoughts.

Collaboration

We work collaboratively together and with our partners to create opportunities to tell Jersey's story and benefit the Jersey visitor economy.

Passion

We have great enthusiasm for Jersey, love what we do and are proud to be making a difference.

Credibility

We work hard to be trustworthy and dependable and always strive to be an honest voice for the tourism industry of Jersey.

Resilient

We are pragmatic and look forward confidently even when the occasional knock tries to push us of course.

Financial Report

	2018		2017	
	£	£	£	£
INCOME				
Grant from States of Jersey	5,000,000		5,100,000	
Other net income	73,217		33,169	
		5,073,217		5,133,169
OPERATING EXPENSES				
Marketing Costs	3,575,819		3,517,622	
Staff Costs	886,623		894,826	
Other Operating Costs	663,413		588,383	
		5,125,855		5,000,831
(DEFICIT)/SURPLUS FOR THE YEAR		(52,638)		132,338

This is an extract of the audited financial statements which are available on our website.

Visitor Economy Profile

With 725,400 visits, generating 2.7 million visitor nights, worth £268.3m of on-island expenditure, 2017 was an encouraging year for Jersey's visitor economy. In fact, it was the strongest year for a decade in terms of the volume of visitors, and best year since 2011 when looking at the amount spent on the island.

The year was not without its challenges – with factors as diverse as the Royal Wedding, Beast from the East, FIFA World Cup and French industrial action all buffeting the market. There were positives too, including the return of the Super League Triathlon, the addition of yet another easyJet route from Scotland serving the island, and the opening of the first Premier Inn in the Channel Islands.

At first sight many people might consider the visitor economy to be limited to hotels, restaurants and attractions, but its influence spreads much more widely, helping to support jobs in a wide array of industries and helping preserve the island's treasured heritage and environment. In total around 7,000 jobs are supported by tourism activity, that's around one in every eight.

More visitors mean more spending in the local economy, which is not only good for those businesses with which the visitor interacts, it is also good for Government of Jersey tax coffers with five pence in every pound spent locally being GST. In 2018, around £13.4m of GST revenue came courtesy of visitors to the island – an amount helping underpin public spending on services such as health and education. This is equivalent to about £127 per man, woman and child living on the island.

Visit Jersey has been running an Exit Survey since the summer of 2016, conducted by an independent agency, 'Island Global Research'. This study allows us to gain robust estimates regarding the volume and value of tourism to Jersey and profile the characteristics of visitors.

Interviewing takes place at different times of the day and on different days of the week each month to ensure that all routes are covered. In total around 45,000 interviews take place each year to establish the volume of passengers that are visitors, and a further 13,500 in-depth interviews take place with visitors to explore more about the characteristics of their trip.

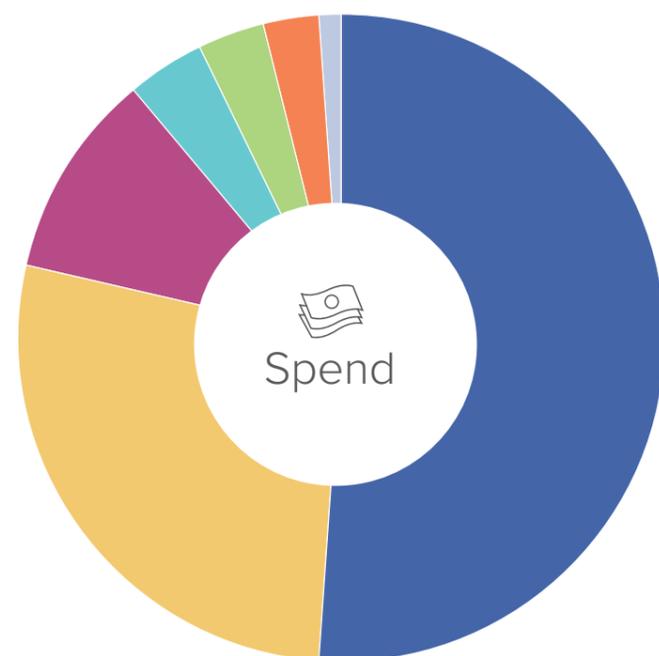
Across the following pages we profile some of the insights that emerge, helping us to gain a much richer understanding of Jersey's visitor economy. All data is taken from the Exit Survey unless otherwise stated.

The Volume and Value of Tourism in Jersey in 2018

Visitors spend money on many products and services during their stay in Jersey. Clearly no one visit is going to have precisely the same spend profile as another, so arithmetic averages are merely a gauge to spending. The chart below conveys clearly just how vital tourism is to a broad range of businesses; for example, the 'typical' visitor spends £38 in Jersey's shops.

	2017	2018	Change
Total Visits (000s)	705.1	725.4	3%
Of which:			
Visits lasting at least 1 night	604.8	617.7	2%
Day trip visits	100.3	107.8	7%
Total Visitor Nights (m)	2.868	2.719	-5%
Total On-Island Spend (£m)	£243.9	£268.3	10%
Nights per Visit for Overnight Visits	4.75	4.40	-7%
Spend per Night	£85	£99	16%
Spend per Visit	£346	£370	7%

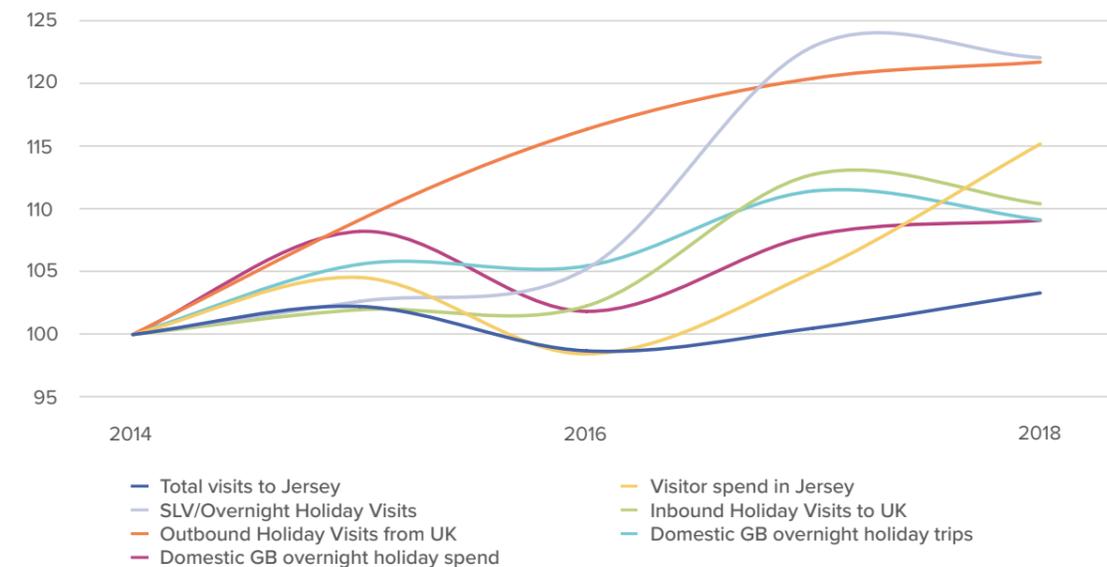
Spend by Category



Accommodation	£190
Food and drink	£101
Retail	£38
On-island Transportation	£15
Attractions and Activities	£12
Other items	£10
Tours	£4

Trends

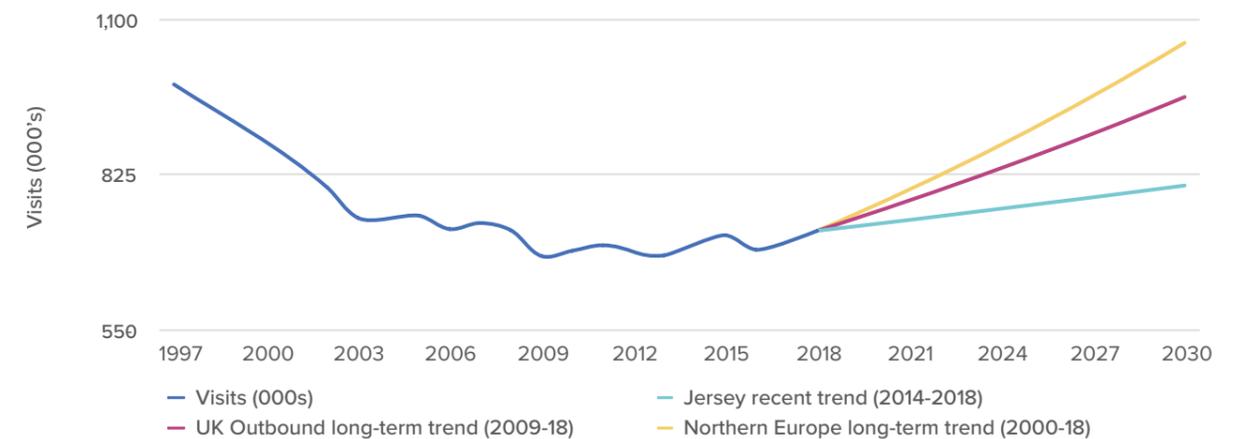
The chart below illustrates Jersey's progress indexed to 100 since 2014. Total visitor numbers, overnight holiday visitors and total visitor spend are compared with trends in the UK market. The chart shows good progress in total spend and overnight holiday visitor numbers.



The following charts show historic trends in the number of visits to Jersey and the amount (in nominal terms) spent on the island by these visitors. The charts also signpost potential future trajectories.

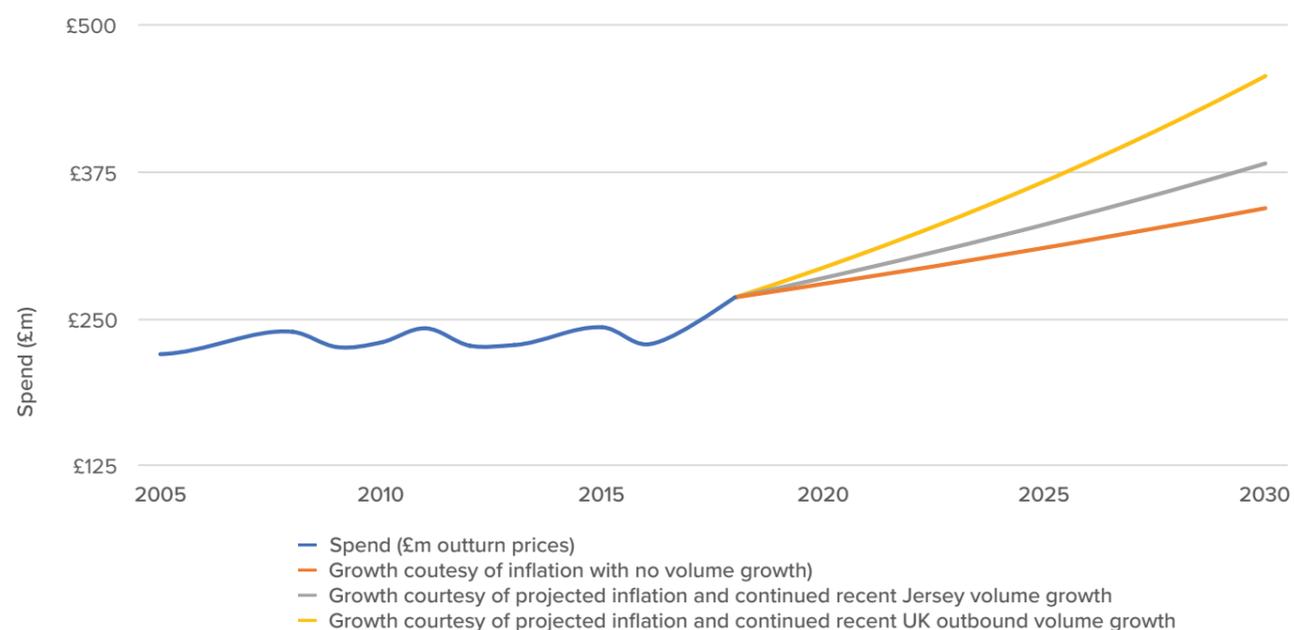
In terms of volume of visits, the island could be welcoming one million visits before the year 2030 if it achieved the typical rate of growth seen in Northern European destinations. And we would be very close to one million visits if Jersey could maintain its market share of future outbound travel from the UK. Jersey would fall short if growth rates remain similar to the recent period. If Jersey were to record 3% per annum growth in visits, as seen in 2018, 1 million by 2030 is achievable.

Volume Trends and Projections



Value Trends and Projections

It is trickier to look at future visitor spending since this value is a function of the number of trips, the typical spend pattern per trip and the amount of inflation between now and the future. The chart below shows a range of possible future spend scenarios. The upper projection assumes inflation in line with HM Treasury expectations and Jersey maintaining a steady market share of projected UK outbound travel. The middle line indicates what might happen courtesy of inflation and growth that mirrors the recent inbound performance for Jersey.



Purpose of Visit

Predominantly visitors travel to Jersey for a holiday, but many other trips contribute towards the overall size of the pie; for example, business visits, trips to see friends and relatives or journeys to watch or participate in a sporting activity.

	Overnight Visits (000s)			Day Trip Visits (000s)			Total Visits (000s)			Visitor Nights (m)			Nights per Overnight Visit		
	2017	2018	Change	2017	2018	Change	2017	2018	Change	2017	2018	Change	2017	2018	Change
Holiday	417.8	414.7	-1%	71.8	66.2	-8%	489.6	480.9	-2%	1,953	1,873	-4%	4.68	4.52	-0.16
Business	60.4	57.3	-5%	17.4	19.5	12%	77.7	76.8	-1%	0.267	0.173	-35%	4.43	3.01	-1.41
Visiting Friends and Relatives	101.4	105.3	4%	0.8	1.8	111%	102.2	107.1	5%	0.553	0.524	-5%	5.45	4.98	-0.47
Other	25.3	40.3	60%	10.3	20.3	97%	35.6	60.7	71%	0.095	0.149	57%	3.75	3.70	-0.04
Total	604.8	617.7	2%	100.3	107.8	7%	705.1	725.4	3%	2,868	2,719	-5%	4.75	4.40	-0.35

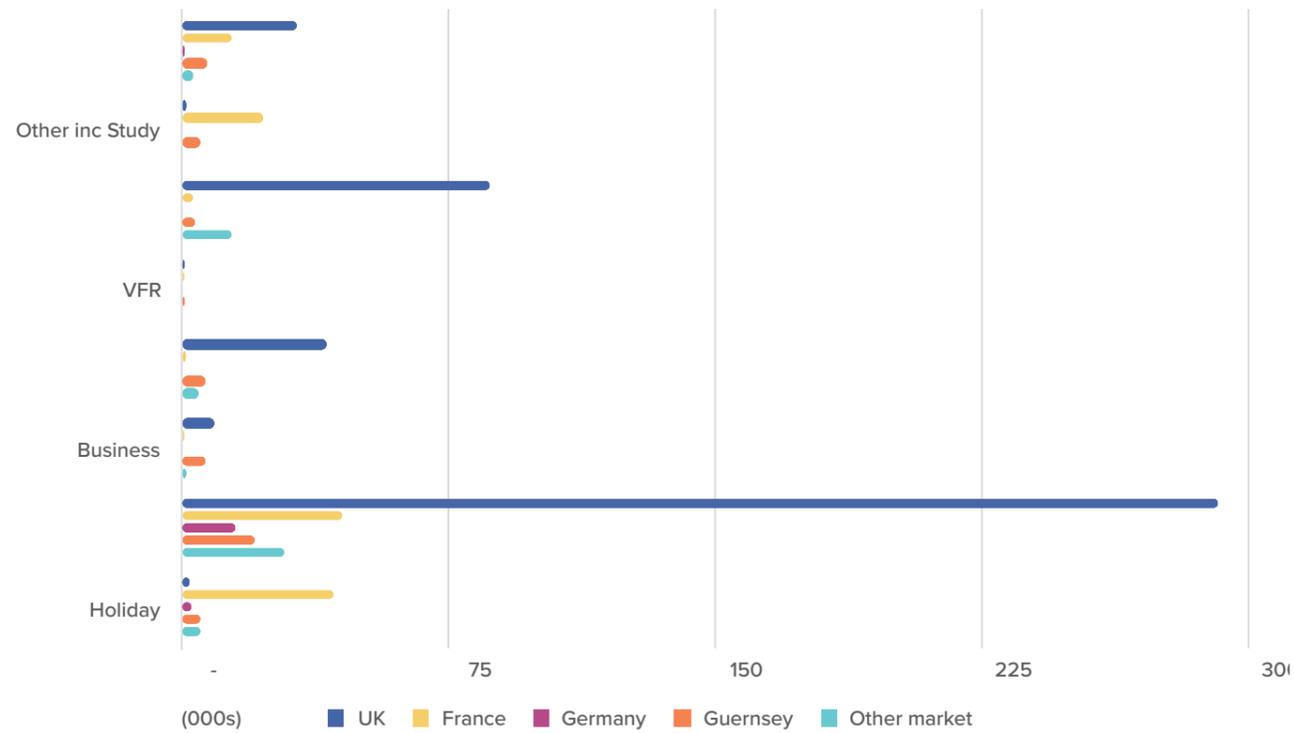
Country of Residence

The UK is unquestionably Jersey's key inbound market, regardless of whether looking at visits, visitor nights, or visitor spending. The following table reveals some notable differences between markets. For example, there are more day trip than overnight visits from France, visits lasting at least one night are typically two to three nights in duration from France or Guernsey but as long as seven nights from German, and Brits spend a little less per night than do visitors from France or Germany.

	Visits (000s)			Nights (m)			Overnight Visit (000s)			Day Trip Visits (000s)			Nights per Overnight Visit		
	2017	2018	Change	2017	2018	Change	2017	2018	Change	2017	2018	Change	2017	2018	Change
France	119.9	130.0	8%	0.157	0.183	17%	49.9	63.5	27%	70.0	66.4	-5%	3.2	2.9	-0.3
Germany	19.3	19.7	2%	0.101	0.115	14%	15.6	16.4	5%	3.7	3.3	-11%	6.4	7.0	0.6
Guernsey	38.0	55.1	45%	0.068	0.083	22%	29.9	37.9	27%	8.0	17.2	114%	2.3	2.2	-0.1
Ireland	8.6	10.1	17%	0.043	0.057	31%	8.6	10.0	16%	0.0	0.1		5.0	5.7	0.7
Netherlands	7.0	7.0	-1%	0.027	0.025	-7%	6.2	5.5	-12%	0.8	1.5	83%	4.3	4.5	0.2
UK	469.3	463.6	-1%	2,211	2,057	-7%	455.5	451.2	-1%	13.8	12.4	-11%	4.9	4.6	-0.3
Other	43.1	40.0	-7%	0.259	0.203	-22%	35.6	35.2	-1%	4.9	4.7	-3%	7.3	5.8	-1.5

	Total Spend (£m)			Spend per Visit (£)			Spend per Night (£)		
	2017	2018	Change	2017	2018	Change	2017	2018	Change
France	£16.3	£21.6	33%	£136	£166	22%	£104	£118	14%
Germany	£10.1	£12.9	29%	£522	£657	26%	£100	£112	12%
Guernsey	£7.6	£13.5	76%	£201	£244	21%	£112	£163	45%
Ireland	£3.9	£4.7	21%	£451	£467	4%	£90	£83	-8%
Netherlands	£3.1	£2.7	-13%	£435	£383	-12%	£114	£107	-6%
UK	£188.9	£196.8	4%	£403	£425	5%	£85	£96	12%
Other	£14.0	£16.1	15%	£326	£402	24%	£54	£79	46%

Visits by Country of Residence and Purpose



Mode of Travel

From the following tables it can be seen that the lion's share of visits, visitor nights and visitor spend is by scheduled air services. The importance of scheduled ferry services should however not be downplayed, with this mode delivering more than £55m of on-island spending. It was a strong year for cruise ship visitors and visiting yachtsmen in 2018.

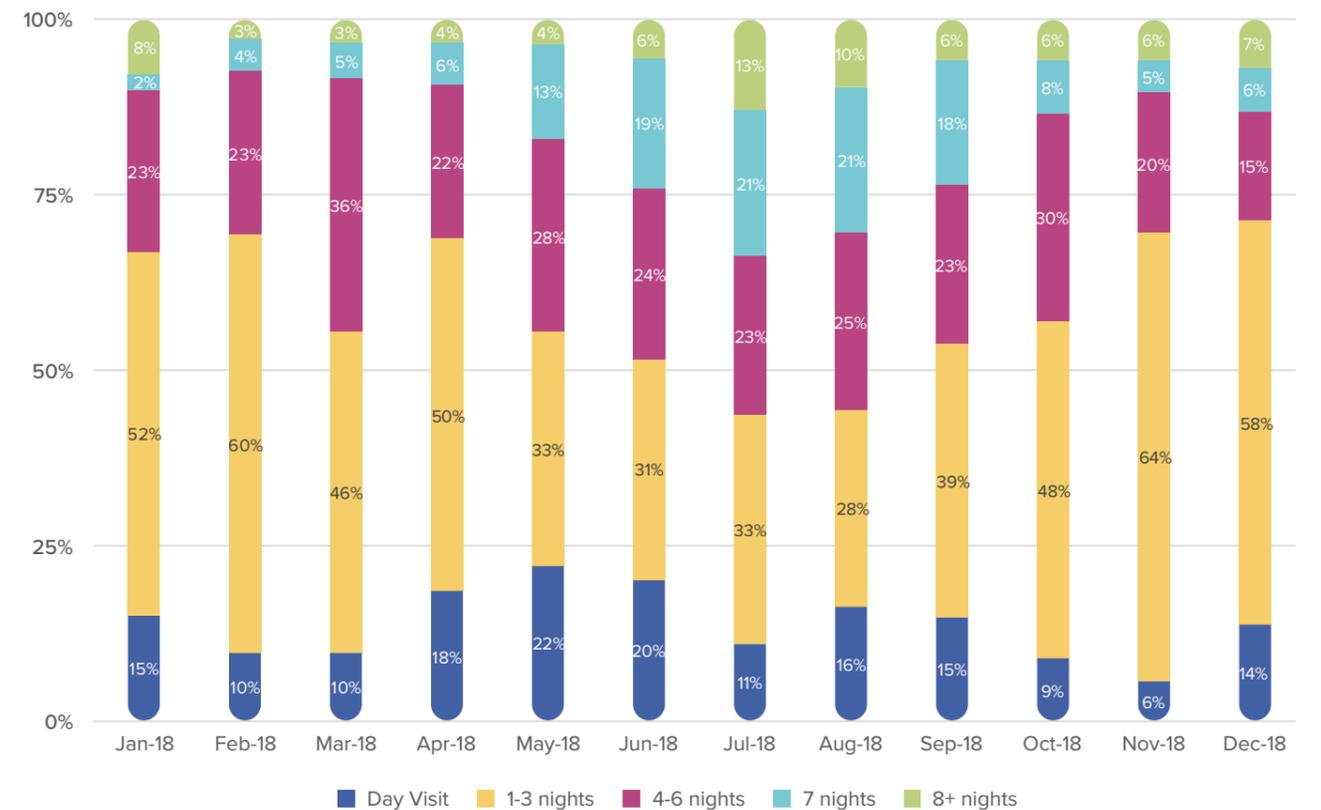
	Visits (000s)			Nights (m)			Spend (£m)		
	2017	2018	Change	2017	2018	Change	2017	2018	Change
Scheduled Air	492.0	489.0	-1%	2.3	2.093	-9%	£199.0	£210.3	6%
Scheduled Sea	190.6	206.6	8%	0.5	0.581	9%	£43.3	£55.4	28%
Private Plane	2.9	5.5	89%	0.0	0.005	89%	£0.2	£0.5	136%
Visiting Yachtsmen	16.3	19.8	21%	0.0	0.04	0%	£1.3	£1.9	50%
Cruise Passengers	3.3	4.5	37%	-	-	-	£0.1	£0.2	52%

	Nights per Visit			Spend per Night			Spend per Visit		
	2017	2018	Change	2017	2018	Change	2017	2018	Change
Scheduled Air	4.7	4.3	-8%	£87	£100	16%	£404	£430	6%
Scheduled Sea	2.8	2.8	1%	£82	£95	17%	£227	£268	18%
Private Plane	1.0	1.0	0%	£80	£100	25%	£80	£100	25%
Visiting Yachtsmen	2.4	2.0	-18%	£32	£48	51%	£78	£96	23%
Cruise Passengers	-	-	-	-	-	-	£31	£35	11%

Duration of Stay

Consumers are increasingly demanding. They want to go on holiday for variable number of days, and at different times of year. The era of everyone going on holiday for seven nights from a Saturday has long since passed. Of course, some consumers still choose to do so, but many value the possibility of traveling for fewer or more nights, and on different days of the week.

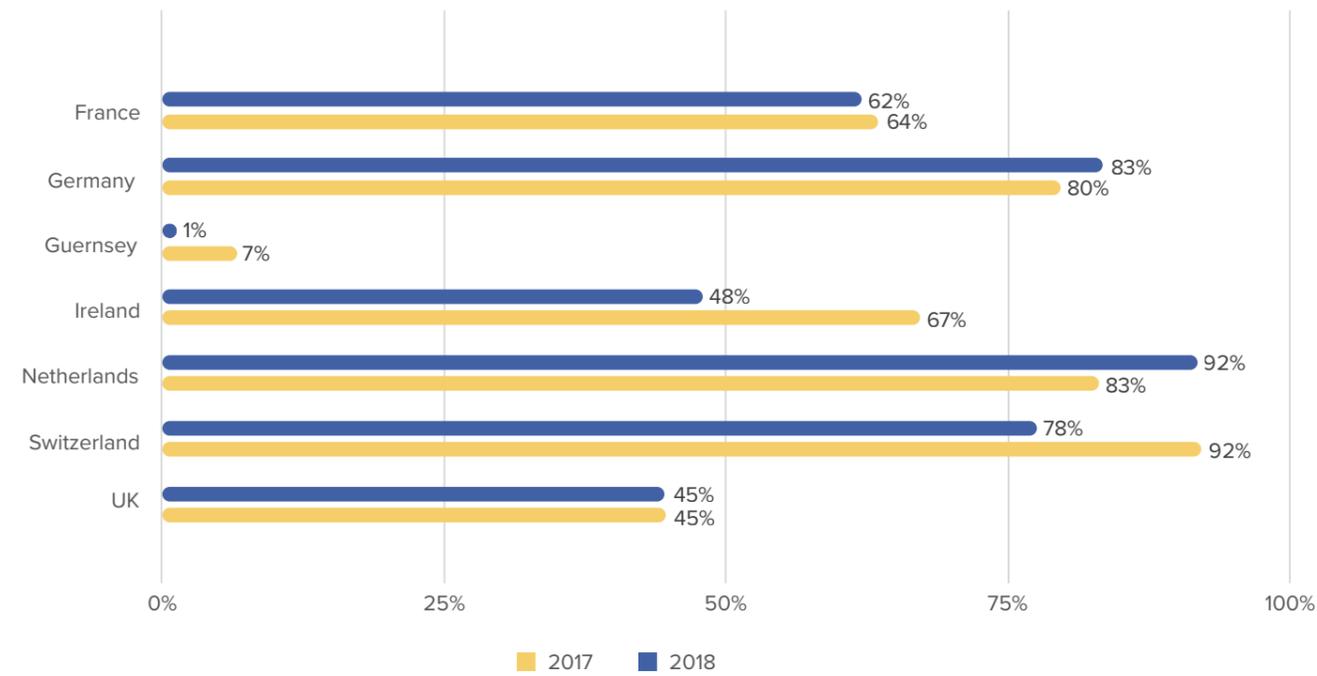
The next chart reveals that even in July and August only around one-in-five visits to Jersey last for exactly one week.



First-time or Repeat Visits

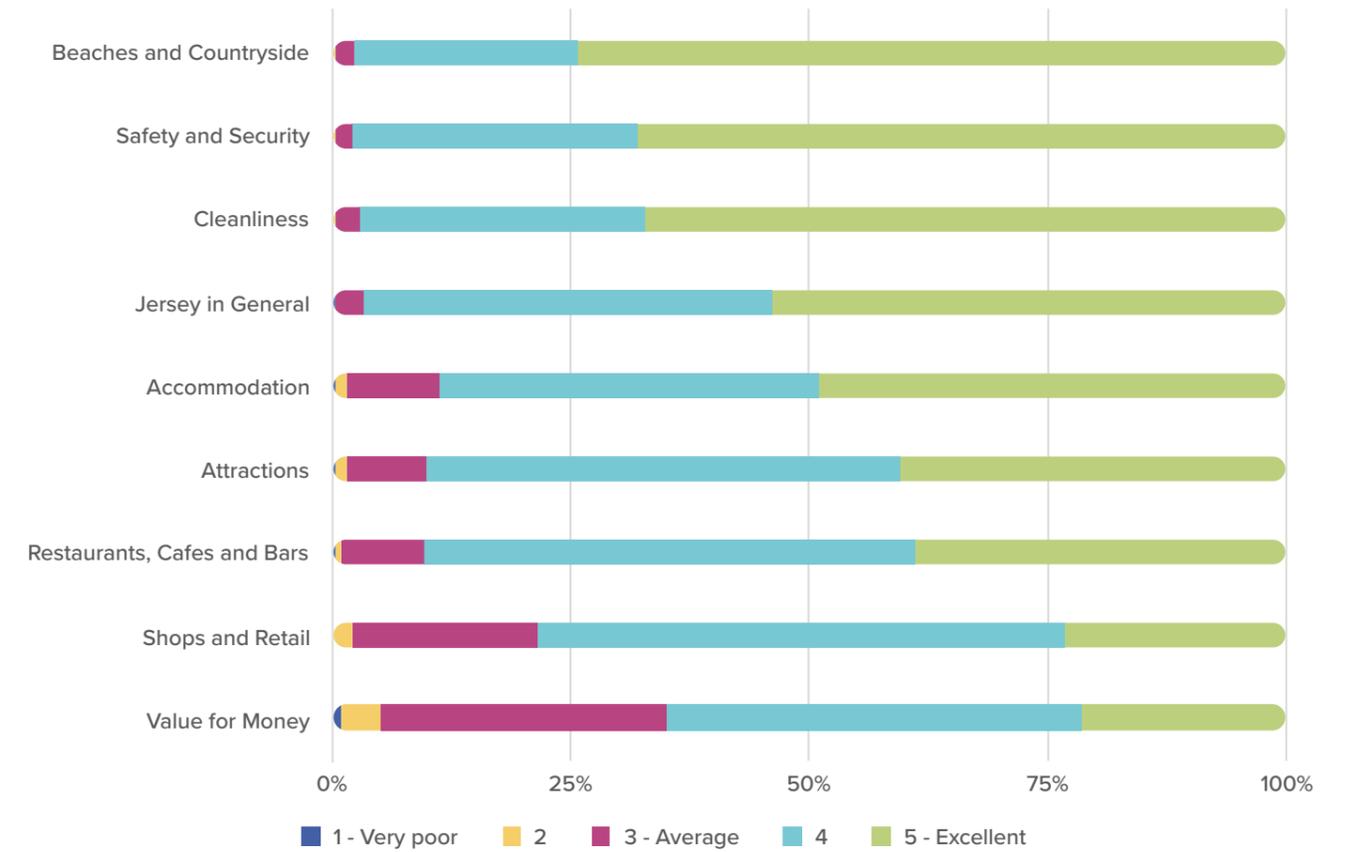
The proportion of Holiday visits to Jersey choosing the island for the first time stood at 48%, down from 52% the year before. However, this apparent decline can be explained by a change in just a couple of source markets, most notably Guernsey, as is evident from the chart.

Holiday Visitors Visiting for the First Time



Attribute Ratings and Net Promoter Score

Those taking part in the Exit Survey are asked a series of questions to establish how they felt about their trip. The chart demonstrates that for the most part our visitors leave with a positive memory. For the second year in succession 'Value for Money' and 'Shops and Retail' perform less well than other measures.

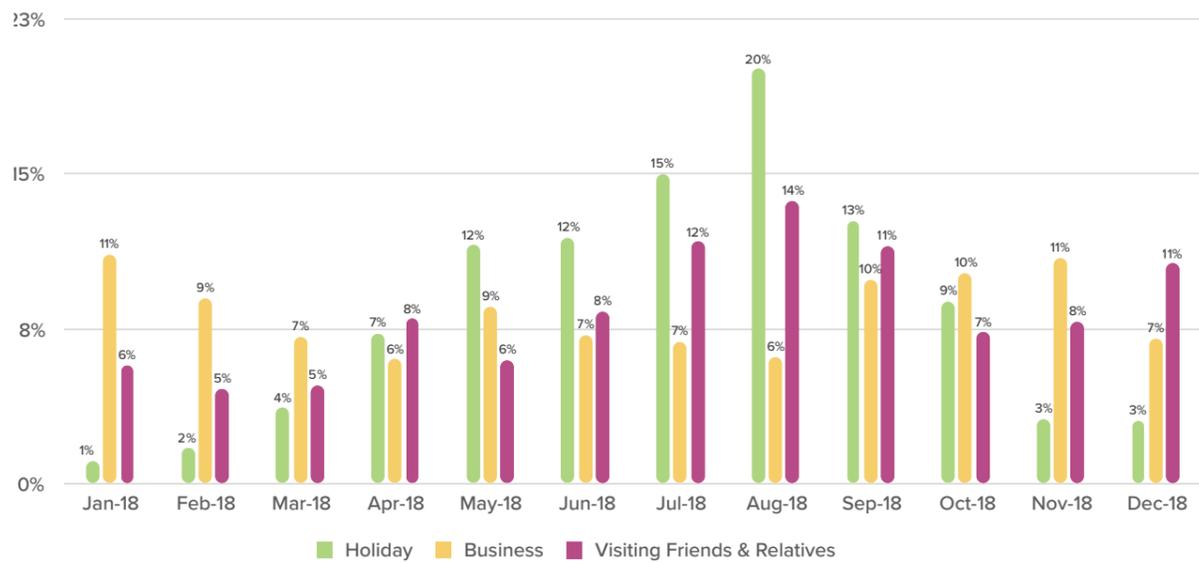


The Net Promoter Score is a commonly used measure of how people feel about a product, service or experience that they have consumed. At worst a Net Promoter Score can be -100, and at best +100. The good news is that in 2018 the NPS achieved by Jersey among departing Holiday visitors was 55, up from 47 the year before.

Seasonality

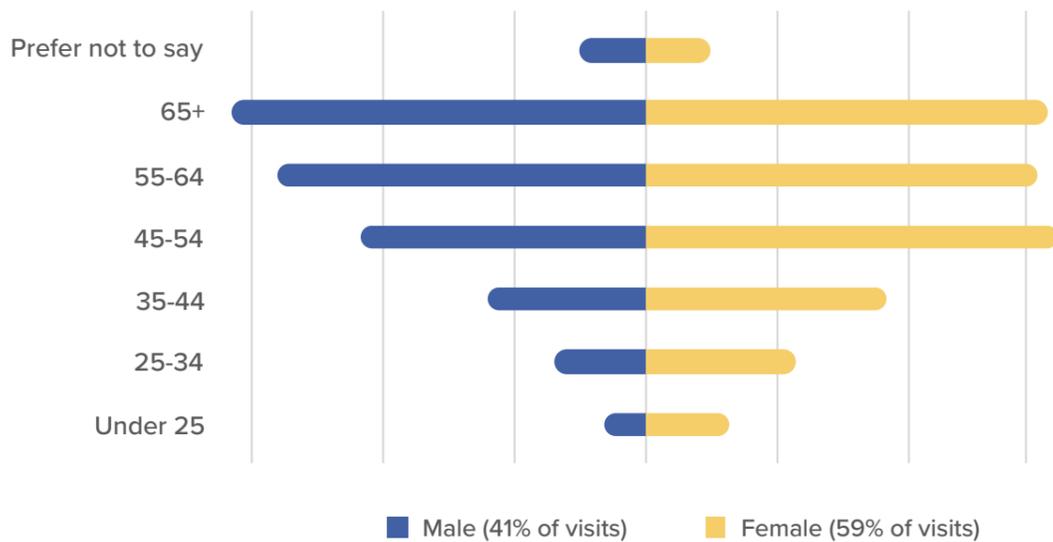
Virtually every destination experiences a degree of seasonal variation in the number of visitors that it attracts. This is the case in Jersey too. This chart indicates that the pattern varies according to journey purpose. Business visits are fairly flat across the year, while Holiday visits clearly peak in the summer months. In 2018, 23% of overnight holiday visits took place in the first and fourth quarters of the year, 1% up on 2017.

Spread by Purpose



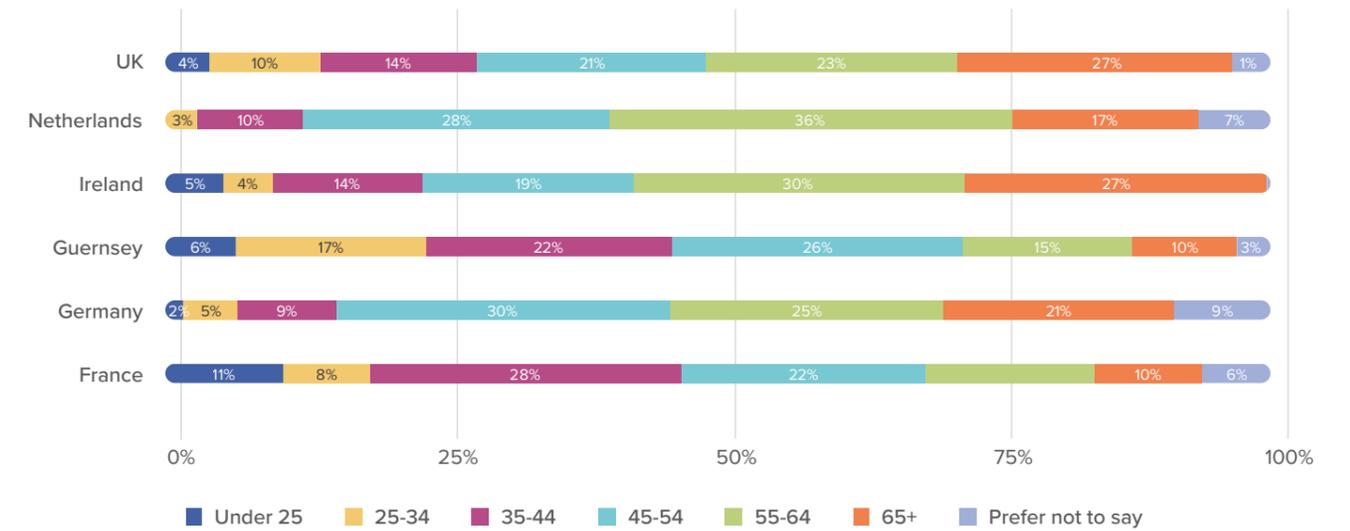
Demographics and Group Composition

The 'population pyramid' for Holiday visitors indicates that at present Jersey attracts a more mature cohort of visitors.



There is variation in the age profile of visitors from different source markets. Holiday visits from Guernsey and France typically are made by younger visitors than is the case from other leading markets.

Age Profile by Market



More than half, 55%, of Holiday visits are made up of a travel group consisting of two adults and no children. The grid reveals that just one-in-five Holiday visits have children (aged under 16) as part of the travel group.

		Adults							
		1	2	3	4	5	6	7	8
Children	0	3%	55%	6%	9%	2%	2%	1%	1%
	1	1%	5%	2%	1%	0%	0%		
	2	1%	6%	1%	1%	0%	1%		
	3	0%	1%	0%	0%				
	4	0%	0%	0%	0%				

Visiting Attractions and Doing Activities

Departing visitors are quizzed regarding whether they did any activity or visited any attraction from a predefined list of around 35. The table shows, as one would expect, those in Jersey for a Holiday participated more than did those visiting for other reasons. It is noteworthy that those visiting friends and relatives typically engaged with 1.2. Holiday day trip visitors are, of course, limited by time. This means their propensity to engage is far lower than that of Holiday visitors who stay for at least one night.

	Average per visit
Holiday visitors	2.9
Business visitors	0.3
VFR visitors	1.2
Day-trip visitors	1.0
Overnight visitors	3.1

Booking Behaviour

The share of Holiday visits booked with accommodation as part of a 'package' remains high, but has fallen once again, from 50% in 2017 to 46% in 2018. Of those booking a traditional 'package', 62% reported that this was via the Internet; 32% said it was either booked over the phone or face-to-face. For those visitors who are happy to book their travel separately from their accommodation the vast majority booked their travel directly with a carrier, and 93% booked travel online. There was a little more variation in how accommodation was booked; nonetheless 58% booked accommodation directly with the establishment they intended to stay over the Internet.

	Holidays with Travel and Accommodation booked together	Holidays with Travel and Accommodation booked together	
		How booked Travel	How booked Accommodation
Internet direct with provider (airline, ferry company, hotel etc)	33%	87%	58%
Internet via third party (travel agent, tour operator, booking.com etc)	29%	6%	24%
Non-internet direct with provider (airline, ferry company, hotel etc)	5%	2%	9%
Non-internet via third party (travel agent, tour operator, etc)	27%	1%	2%
Don't know / Booked by someone else / NA	6%	4%	7%
Internet total	62%	93%	82%
Non-Internet total	32%	3%	11%
Share of all Holiday Visits	46%	54%	

Destination

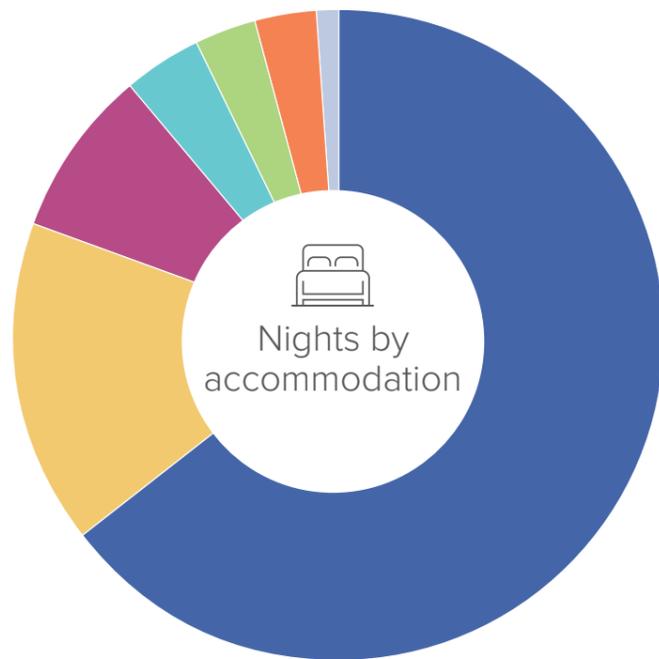
Destination	%	Destination	%
London Gatwick	20.5%	Funchal	0.4%
St Malo	16.2%	Munich	0.3%
Guernsey	9.7%	Aberdeen	0.2%
Southampton	7.6%	Durham Tees Valley	0.2%
Liverpool	5.9%	Humberside	0.2%
Poole	5.1%	Inverness	0.1%
Birmingham	3.2%	Zurich	0.1%
Glasgow	2.9%	Berlin	0.1%
London Luton	2.8%	Berne	0.1%
Granville	2.5%	Rotterdam	0.1%
Manchester	2.3%	Dielette	0.1%
London Southend	2.0%	Vienna	0.1%
East Midlands	1.9%	Luxembourg	0.0%
Doncaster Sheffield	1.8%	Stuttgart	0.0%
Newcastle	1.6%	Saarbrücken	0.0%
London City	1.5%	Palma	0.0%
Belfast	1.3%	Dresden	0.0%
Bristol	1.3%	Erfurt	0.0%
Exeter	1.2%	Hamburg	0.0%
Cardiff	1.1%	Frankfurt	0.0%
Edinburgh	1.1%	Bremen	0.0%
Leeds Bradford	0.9%	Basel	0.0%
Carteret	0.9%	Sonderborg	0.0%
Portsmouth	0.9%	Geneva	0.0%
Dusseldorf (Germany)	0.7%	Biggin Hill	0.0%
Dublin	0.7%	Alderney	0.0%
Norwich	0.4%		

Although not necessarily indicating the final destination that the visitor was returning to, the Exit Survey captures information on which route the respondent was on. The next table shows the share of visits during 2018 by route. This clearly demonstrates the importance of the London Gatwick and St Malo routes.

Year-round	
Seasonal	

Accommodation

Most visitors to Jersey who stay overnight choose to stay in Hotels, accounting for nearly two-thirds of visitor nights by accommodation type. 16% of nights are with friends or relatives.



Hotel	64%
Stayed with friends / relatives	16%
Self catering	9%
Other	4%
Guest house	3%
Camping	3%
Hostel	1%

Separate data is published by the Government of Jersey regarding the amount of available accommodation stock. But this information is only for 'registered' accommodation, and as such fails to take account of smaller accommodation suppliers such as Airbnb.

SoJ 'End of Year' data on registered accommodation stock

	Premises	Persons Accommodated
Camp sites	6	747
Guest House	33	785
Hotel	59	7,884
Self Catering	32	1,186
Youth Hostel	2	188
Total		10,790

Visit Jersey works in partnership with STR to measure the performance of the island's accommodation stock. This table shows key metrics for each of the past three years. It can be seen that in 2018 there were increases in room occupancy, the average daily room rate and also the revenue achieved per available room.

	2016	2017	2018
Room occupancy (%)	65.1	64.9	66.2
Average Daily Room Rate	£99	£104	£106
Revenue per Available Room	£68	£72	£74

Source: STR

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