

Visit Jersey Limited Business Plan 2018



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1. Our Business

Our Vision (why) Help the World Fall in Love with Jersey

**Our Mission (how) Champion Tourism
Tell Great Stories**

A vibrant sustainable tourism industry in Jersey whose value to the economy and community at large is recognised. Specifically:

- 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

Our Goals (what)

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

Our 2018 priorities

Programme

- Roll out #theislandbreak Jersey brand with a strong seasonal focus
- Deliver year 1 of a new Product strategy that supports productivity and competitiveness of our sector
- Develop and deliver year 1 of a new Trade strategy to sustain and grow the distribution of product
- Create an Events Jersey planning framework that helps retain and win events
- Implement the outcome the Tourist Information Centre tender
- Support bringing Super League Triathlon to Jersey and promote to off-island audiences
- Remain agile and respond to ad-hoc opportunities that might arise that help achieve our business targets

Operations

- Ensure we have business platforms that support business objectives
- Ensure the business is GDPR compliant
- Introduce 360° review for all staff
- Retender the German representative supplier contract
- Move the Visit Jersey office and continue to host the JPPL executive

Policy

- Champion tourism highlighting VJ's contribution to our sector
 - Provide insights and leadership for the industry on policy matters
 - Explain how the visitor economy benefits the island's community; economic and societal
- Produce a "tourism manifesto" to inform the public debate on tourism and support with a series of policy documents
- Monitor and report on the 21 Jersey Destination Plan recommendations and suggest any remedial actions required

2. Context

The Jersey Destination Plan sets out a long-term tourism strategy for all in Jersey. This Business Plan covers 2018

Economic benefits

- Gross Value Added (GVA) contribution in 2015 was £432m, equivalent to 8.3% of the whole economy and 12.6% of all employment (source: The Economic Contribution of Tourism to Jersey, Tourism Economics Report benchmarked “tourism” GVA for the first time using UNWTO methodology)
- £228.3m expenditure from 692,000 visitors in 2016 generated £11.4 million GST (source: as above)

Community benefits

- Provision of tourism amenities benefit the whole community and help make Jersey an attractive place to reside in, do business with as well as visit
- Visitors generate revenue to support attractions, festivals and events
- Tourism success breeds pride in place

In its recent Annual Report Jersey’s Fiscal Policy Panel noted that “while earnings have been relatively flat in real terms since 2006, there has been a falling labour productivity.” The lacklustre picture for labour productivity in Jersey in the past decade is mirrored in the UK – the so-called ‘productivity puzzle’, whereby the historical norm of increasing levels of productivity over time would appear to have faltered. The recent Visit Jersey sponsored report “The Economic Contribution of Tourism to Jersey: The Productivity Opportunity” noted that there is great potential to improve the productivity of the tourism sector by growing demand outside of the peak summer months. While tourism employment on the island is seasonal in nature, it is much less so than the volume of visits, a clear signal that the sector could readily absorb additional demand in the shoulder months without putting any upward pressure on the demand for labour. The outcome being a more productive tourism industry, and one which is responding to the ever-growing appetite for short-breaks. The analysis shows that the tourism sector in Jersey is equally as productive as is the tourism sector in London. The report went on to note that “whilst employment in Jersey has risen from around 52,000 to around 58,000 since 2001, employment levels in the hotels, restaurants and bars sector has been broadly flat over the last fifteen years. Furthermore, the share of that employment headcount which is either licensed or registered (or, previously, Category J J/Non-locally qualified) has fallen since the mid-2000s, implying that more jobs in the sector are going to locally qualified people.”

In addition to growing demand at quieter times of year there is opportunity to improve the productivity of the tourism sector through enabling and encouraging businesses to invest in their IT, both in terms of infrastructure and skills – something that aligns closely with the goals of Digital Jersey and Jersey Business.

Productivity in the tourism sector is improving. In the States publication “Measuring Jersey’s Economy GVA and GDP 2000-2016,” productivity (GVA per FTE) in real terms, shows that for six straight years “hotels, restaurants and bars” (tourism as defined in the report) productivity had risen to 111.4 in 2016 (2013=100). This growth outperformed all other sectors except “electricity, gas and water” and “agriculture”.

2018 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 2018.

Other key assumptions include:

- An increase in the number of inter-island ferry crossings during the summer months in comparison with 2017
- Growth in the number of Saturday-only routes from continental Europe (especially Germany) in comparison with 2017
- States of Jersey policy decisions being an enabler of hospitality sector businesses
- Jersey hospitality sector businesses able to recruit and retain suitably qualified staff to service the growing off-season demand

- On-time opening for the new Premier Inn in St Helier
- Sterling continuing to trade at between €1.05 and €1.25
- No intimation that Brexit will lead to a 'cliff-edge' departure for the UK from the EU (impact on the Financial and Business Services sector both in the UK and in Jersey)

Government Priorities

Tourism is a key growth sector identified by the States of Jersey. The States Enterprise Strategy defines the priorities and building blocks of government support for an economy characterised by productivity-led growth. Visit Jersey supports the Enterprise Strategy priorities through the delivery of campaigns, sharing of insights and developing high-value co-operative work with partners.

Enterprise Strategy Priority 1 - Improve the productivity of existing businesses

Enterprise Strategy Priority 2 - Support local companies with high growth potential

Enterprise Strategy Priority 3 - Support the creation of new high-value businesses

Visit Jersey, in partnership with Jersey Business, Locate Jersey and Digital Jersey, will agree a collaborative approach.

Performance

The Exit Survey- January to August 2017 (updated as new information becomes available) shows the number of visits to Jersey during the first eight months of 2017 was 520,256 with visitor nights reaching 2.1 million. On-island expenditure is estimated on a quarterly basis, and during the period January to June it stood at £94.5m. During the period January to August 2017, just more than two-thirds of visits (68%) were made by Holiday visitors, 9% were visiting for Business reasons and 14% to spend time with friends and relatives. Most visitors (64%) were residents of the UK, making this by far Jersey's largest source market. Very nearly one-in-five visitors were from France during the first eight months of the year while 5% were residents of Guernsey. Around one-in-seven visits are day trips, while among trips that last at least one night the average length of stay was 4.8 nights. Across all trip purposes during the first eight months of 2017 44% of visitors were making their first visit to Jersey, but when looking just at Holiday visitors this proportion increases to 52%. One third of visitors left the island by sea and two thirds by air.

| | Jan-Aug 2017 | Jan-Aug 2016 | change |
|---|-----------------|-----------------|------------|
| Proxy for old Staying Leisure Visits Measure | 297,153 | 261,703 | 14% |
| Proxy for old Staying Business Visits Measure | 40,184 | 41,683 | -4% |
| Proxy for all other types of visits | 182,919 | 220,033 | -17% |
| Of which: | | | |
| 'Day Visits' | 78,567 | 118,574 | -34% |
| 'Staying Visits' | 104,351 | 101,459 | 3% |
| Total Visits - All Trips | 520,256 | 523,419 | -1% |

The loss of day visits so far in 2017 continues to be a function of reduced capacity and higher air fares from Guernsey, and, probably, a reduction in business-related day visits from mainland GB. This table shows a set of proxies for the 'old' definitions to facilitate year-on-year comparisons.

We are upbeat that more people will have chosen Jersey for a holiday during 2017 than did so during 2016. This is particularly the case for visitors from our main source market, Britain. There have been challenging circumstances in relation to our second most valuable holiday market, Germany, due to the loss of AirBerlin routes, but we anticipate a more promising prospect in 2018 with the introduction of new direct routes and an expanded capacity on existing routes. 2017 has been another tough year for inter-island travel, whether that is for leisure or business. It is therefore encouraging that stakeholders are working hard to secure a regular inter-island ferry service in 2018.

3. Our 2018 Activities

Marketing

Programme Budget- UK, France & Germany- £2,096,000 and 4 staff

A 2018 Marketing Plan with SMART targets has been prepared and can be found on our business website. In 2018 our key segments and plans are:

UK Budget £1,993,000

| | Trade Update | J | F | M | A | M | J | J | A | S | O | N | D |
|-----------------------|--------------|---|---|---|---|---|---|---|---|---|---|---|---|
| Winter Campaign | November | | | | | | | | | | | | |
| Summer Campaign | November | | | | | | | | | | | | |
| Spring Campaign | January | | | | | | | | | | | | |
| Autumn Campaign | July | | | | | | | | | | | | |
| VJ Marketing Channels | N/A | | | | | | | | | | | | |
| PR | N/A | | | | | | | | | | | | |

| Retain 1 | Retain 2 |
|--|---|
| <ul style="list-style-type: none"> • 55+ • Retired / working • 2+ holidays a year • 3-6+ month lead time • Package driven • 60 miles from departure points • ABC1 | <ul style="list-style-type: none"> • 25-54 • Working • 1+ holidays a year • 3-6+ month lead time • Package driven • 60 miles from departure point • ABC1C2 |
| Convert 1 | Convert 2 |
| <ul style="list-style-type: none"> • 25-54 • No children • 2+ holidays a year • 4-6-week lead time • Working • Independent traveller • 60 miles from departure points • ABC1 | <ul style="list-style-type: none"> • 25-54 • Children • 2+ holidays a year • 4-6-week lead time • Working • Independent traveller • 60 miles from departure points • ABC1 |

1. Bring brand Jersey to life

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

Consumer research informs our thinking and the visitor will remain at the centre of the Jersey experience. We will tell our stories in a compelling manner that drives visitors to want to visit. This will be achieved by producing enthralling emotional content delivered through seasonal campaigns. VJ will:

- **Defend:** Keep reminding current visitors just how special Jersey is. Our loyal summer visitors are important to us
- **Build:** Present and build the brand in new segments. Move potential visitors from “*I am not considering Jersey*” to “*I am considering Jersey*”
- **Evolve:** Adapt our messaging to stay current and competitive in line with visitor research

2. Align our best prospects to best channels

The right people, in the right place, at the right time, with the right message

Focus our limited resources on opportunities that represent the greatest potential for growth. Research will help define these opportunities. We will align our messages at each stage of potential visitors’ travel lifecycles to inspire potential visitors to engage, plan, book, visit and share their Jersey experience.

3. Capture, create, and nurture visitor intimacy

Activate and engage visitors through relevant, breath-taking and personalised content

Visit Jersey will build more engaged relationships with current and potential visitors through the continuous production, curation and distribution of breath-taking and relevant content. Our digital assets will be incrementally improved to provide better usability through personalisation. This will have two features; 1) working further towards the top of the “sales funnel” to grow the consideration set- the number of people we can interest in Jersey and 2) working harder at the base of the sales funnel to provide higher quality referrals to partners. We will also work hard to communicate this themed content framework to our industry partners.

4. Partner with brands

Work with our partners to better distribute brand Jersey

We will identify possible brand partners across travel and lifestyle sectors and seek to develop joint marketing initiatives. This will help amplify brand Jersey using third party marketing channels. This will broaden the range of opportunities for potential visitors to source and buy Jersey.

France Budget £278,000

| Day-tripper | Short stay |
|---|--|
| <ul style="list-style-type: none"> • 25-54 (or groups) • Children • 2+ holidays a year • Holidaying in the region • Working • Independent traveller • ABC1 | <ul style="list-style-type: none"> • 25-54 • no Children • 2+ holidays a year • West/North West France • Working • Independent traveller • ABC1 |

| | Trade Update | J | F | M | A | M | J | J | A | S | O | N | D |
|-----------------------|--------------|---|---|---|---|---|---|---|---|---|---|---|---|
| Winter Campaign | November | | | | | | | | | | | | |
| Spring Campaign | January | | | | | | | | | | | | |
| Autumn Campaign | July | | | | | | | | | | | | |
| VJ Marketing Channels | N/A | | | | | | | | | | | | |
| PR | N/A | | | | | | | | | | | | |

Work in partnership with Condor France and suppliers to generate and stimulate demand through the continuous production, curation and distribution of powerful and relevant destination campaigns. The specific timing of activities in France will be agreed with Condor France in late 2017. Additionally we will cooperate with Manche Iles Express and Bureau des îles-Anglo-Normandes (BIAN).

German speaking countries Budget £345,000

(includes German trade cooperative promotions)

| Retain & Grow | Convert |
|--|--|
| <ul style="list-style-type: none"> • 55+ • Retired / working • 2+ holidays a year • 3-6+ month lead time • Package driven • 60 miles from departure points • ABC1 | <ul style="list-style-type: none"> • 25-54 • no Children • 2+ holidays a year • 60 miles from departure points • Working • Independent traveller • ABC1 |

| | Trade Update | J | F | M | A | M | J | J | A | S | O | N | D |
|-----------------------|--------------|---|---|---|---|---|---|---|---|---|---|---|---|
| Cooperative marketing | November | | | | | | | | | | | | |
| VJ Marketing Channels | N/A | | | | | | | | | | | | |
| PR | N/A | | | | | | | | | | | | |

VJ will continue with our strategy of investing in and leveraging tour operator partnerships. We aim to 1) sustain and 2) build on the 2017 summer charter seat numbers by 1) extending the length of the season and 2) influencing new routes. Limited direct to consumer activity, including social media will be conducted to support tour operator programmes.

Product

Programme Budget £105,000 and 3 staff

A 2018 Product Plan has been prepared and can be found on our business website. At the heart of our product work is the drive to seek continuous productivity improvements of tourism assets and strengthen our competitiveness. In 2018 we will:

- Approach product development as “Team Jersey” and align our product work to the Island break
- Take to market the most relevant and engaging features of Jersey in a more expressive way
- Revitalise the industry’s appetite for product development and investment
- Package up ‘Signature Experiences’ which focus on factors which motivate and inspire holiday destination choice
- Optimise under-utilised resources to improve seasonality and boost sector output
 - Accommodate visitors outside of peak months and develop events-led tourism
- Agree joint activities with suppliers to close product gaps as identified in the product audit
- Deliver Destination Jersey 2018
- Work to influence the required tourism skillset among the resident population. This is in partnership with education/training suppliers

Events Jersey

Total Budget £200,000 and 1 staff

Events Jersey sits in the Product team due to the close nature of its remit with the broader product aims of improving productivity and boosting competitiveness. A key Events Jersey focus is on driving visitation in the shoulder months. There has been some success in 2017. During September Jersey hosted a number of sporting events, including the Super League Triathlon for the first time, as well as the Festival of Words. In 2018 Events Jersey will:

- Define the ‘Events Jersey’ offer and establish our events USP’s
- Reach out to sister organisations such as Sports Jersey to inform our approach and establish an Events Jersey Steering Group
- Progress the Events Jersey website, best practice toolkit and online presence to promote on-island assets; products, partners, capacities and assets
- Coordinate (create an assets register and access (how to use) rules) relevant States assets (seating, etc.) that may be made available to event organisers
- Support EDTSC to retain the Super League Triathlon in 2018 and beyond. Specifically set aside up to £100,000 in 2018 to support winning the rights to stage SLT in 2018 and promoting the event off-island (£50,000 from Events Jersey and £50,000 from Visit Jersey marketing)
- Support existing events that have potential to grow visitor numbers. Such events as the Motor Festival, Boat Festival, Weekender, Festival of Words, etc.
- Promote Jersey as a great choice for events’ organisers highlighting that Jersey can be a ‘hero’ events location
- Work with our on-island business community to encourage them to host events in Jersey
- In consultation with Visit Jersey colleagues and event organisers, conduct marketing and communication activities to support specific events

Trade Sales & Cooperative Promotions

(budget excludes Germany) **£554,000 and 1 staff**

The Trade Manager will work with Hills Balfour (our trade representative agency based in London) to develop a new Trade strategy that will seek to acquire new visitors-incremental growth in visitor numbers and spend. He/she will do this by influencing travel distribution channels. Specifically, this will mean identifying, courting and capturing new sources of visitors via off-island travel trade buyers- traditional tour operators, OTAs, carriers (scheduled and charter). The strategy has yet to be agreed by the board but the following activities are expected to be included:

- Align our trade efforts more closely with the Ports of Jersey. Specifically develop a trade programme of joint initiatives that build upon Visit Jersey's Best Prospect model and the Ports Route Capacity analysis. In France explore opportunities to retain day visits and build staying holiday visitor numbers, in the UK focus on filling spare seats out of the main season, in Germany identify and support German tour operators to grow the summer charter market to Jersey, and in Scandinavia, supported by the Ports of Jersey and suppliers, jointly develop a Scandinavian Plan
- Identify key travel intermediaries in the UK and Europe which do not include Jersey and initiate relationships with them to influence 1) their understanding of Jersey and 2) their selling of Jersey products
- Manage a "Market Development Challenge Fund" to achieve Visit Jersey's ROI target
- Where appropriate, identify and initiate trade promotion opportunities (e.g. ITB, WTM) to promote Jersey as a visitor destination. This may be solo or in partnership with others. Aligning more closely with Britain at key trade exhibitions

Visitors & Information Services Activities

£242,000 and delivered by third party

Our mission is help the world fall in love with Jersey. This necessitates providing information on-island to help visitors:

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

In 2017 VJ launched a new What's On guide and official Jersey map. We will monitor feedback and adapt as required. In 2018 we will assess the requirements for an "app" and make recommendations.

The Tourist Information Centre (TIC) may move, subject to an on-going tender at the time of writing. Wherever the location, it will be managed by third party(ies). Visit Jersey will oversee the management and delivery of information provision to visitors. 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 training.

Research

Budget £310,000 and 1 staff member

The breadth and value of results emanating from our continuous Exit Survey will grow throughout 2018. This will allow us to share the latest estimates for the volume and value of tourism in Jersey and begin profiling the types and behaviour of visitors who are welcomed to the island. Other on-going research programmes are:

The Brand Tracker STR accommodation reporting Jersey Attractions Benchmark Survey Ecorys B2B evaluation Forward Booking Survey

These items consume £234,000 of the research budget. The remainder of the budget is for discretionary research projects to support the Business Plan. 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. We will apply findings from a year-long study that has been taking place during 2017 that explores the Visitor Experience in Jersey and how this compares with the experiences that our visitors have had in other destinations.

Measurement and evaluation will remain at the centre of our research activities, ensuring 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.

5. Performance & Measurement

In 2017, Visit Jersey unveiled a performance dashboard for our key suppliers and the board that reports on 1) the visitor economy and 2) Visit Jersey's performance. This is online and allows stakeholders to clearly see the performance of the sector and Visit Jersey's contribution. A version of this dashboard will be rolled out to the public during 2018. This Business Plan contains a Balanced Scorecard to record the forecasts for the visitor economy as well as specific Visit Jersey targets.

Jersey's Visitor Economy

The overall performance of the Jersey visitor economy will be judged by the basket of metrics detailed below. It is important to understand that Visit Jersey is not solely responsible for achieving these numbers. It is a joint enterprise. In July 2016 we changed the way information about our visitors is collected; moving from a registration card approach to a regular exit survey system. The exit survey provides more detailed data but there is not an exact like-for-like comparison pre and post July 2016. Where necessary we have created surrogate measures to allow like-for-like comparisons.

2018 Balanced Scorecard

2017 forecasts are based on January to August 2017 data and will be updated as information becomes available

| | 2018 | 2017 Forecast | 2016 Actual | | 2018 | 2017 Actual | 2016 Actual |
|---|-------------------|---------------------|-------------|---|-----------------|-------------|-------------|
| Visitor Economy Forecast | | | | Visit Jersey Targets | | | |
| Gross Value Added for hospitality sector * | 8.3% | TBC | 8.3% | Marketing: ROI on grant *** | 5:1 | TBC | 4.7:1 |
| Total visitors | 2017 number +2.2% | 692,000 (no change) | 692,000 | Trade: Travel Trade Partners Satisfaction | 2017 number +1% | TBC | 51% |
| Staying Holiday visitors | 2017 number +4% | 373,800 (+5%) | 356,000 | Product: On-island Supplier Partner Satisfaction | 2017 number +1% | TBC | 51% |
| Day Holiday visitors | 2017 number +2.2% | 90,000 (-15%) | 105,000 | Information Services: Satisfaction with On-Island Information Provision | 2017 number | TBC | 89% |
| Visitor spend-nominal | 2017 number +2.5% | £229m (no change) | £228.3m | | | | |
| First time visitors | 2017 number | 52% (-1%) | 53% | | | | |
| Seasonal spread; holiday visitor numbers outside April to September | 2017 number +0.5% | 19% (no change) | 19% | | | | |
| Island RevPAR** | 2017 number +£2 | £71 | £71 | | | | |
| Net promoter score of visitors | 62 | 55 | 62 | | | | |

*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. This is the first year this approach was adopted and there is no historical data available

** 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

***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

6. Financial Information

2018 Budget

| | |
|-------------------------------|-------------------|
| Total Grant | £5,000,000 |
| Total Staff Costs | £983,000 |
| Research & intelligence | £310,000 |
| Product | £105,000 |
| Marketing | £2,096,000 |
| Trade incl. co-operatives | £771,000 |
| TIC | £242,000 |
| Events Jersey | £200,000 |
| Premises Costs | £60,000 |
| Total Administrative Expenses | £233,000 |
| Operating Expenses | £5,000,000 |

NB

- i) Assumption that grant income of £5m is £4.8m VJ grant, £0.2m Events Jersey grant
- 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 £20,000 from Gold and Silver trade members and a £6,000 (annual) contribution from JPPL for the provision of office accommodation

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.

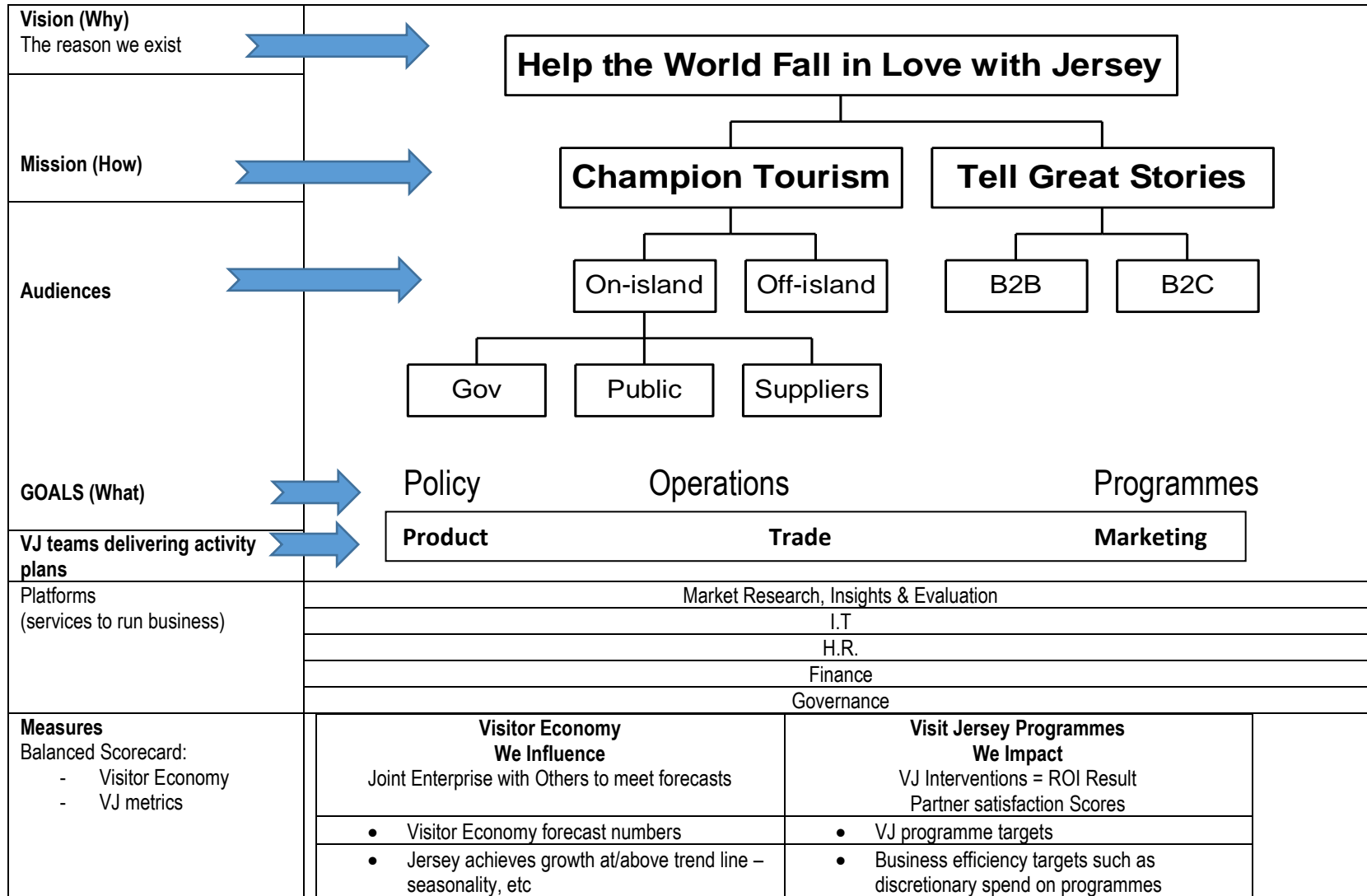
Key Positive Risks

- Introduction of a reliable and competitively priced inter-island ferry service offering the possibility of day-trip travel
- Success of the new and reintroduced direct German routes in summer 2018
- Premier Inn in St Helier unlocks demand for short-breaks

Key Negative Risks

- Sustained weather-related disruption to Jersey's connectivity during high-demand periods of the year
- Major carrier's financial performance worsens leading to changes in their route network
- A sharp deterioration in the UK economy brought about by difficult Brexit negotiations, consumer indebtedness and rising interest rates

Appendix 1 Business Plan Summary



Appendix 2 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 2018 goals, plans and budgets. If additional funding opportunities were to arise we would submit bids in the following priority areas:

- Improve route connectivity to increase visits from key source markets by making it easier for visitors to travel to Jersey
- Create “Signature Experiences” with suppliers to build our tourism products that 1) meet visitors’ needs, 2) extend the tourism season and 3) “fix” localised product issues to improve the visitor experience.
- Productivity improvement by extending the tourism season year-round with a business visits campaign
- 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

Monday, 11 December 2017