

Our mission

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

Our values

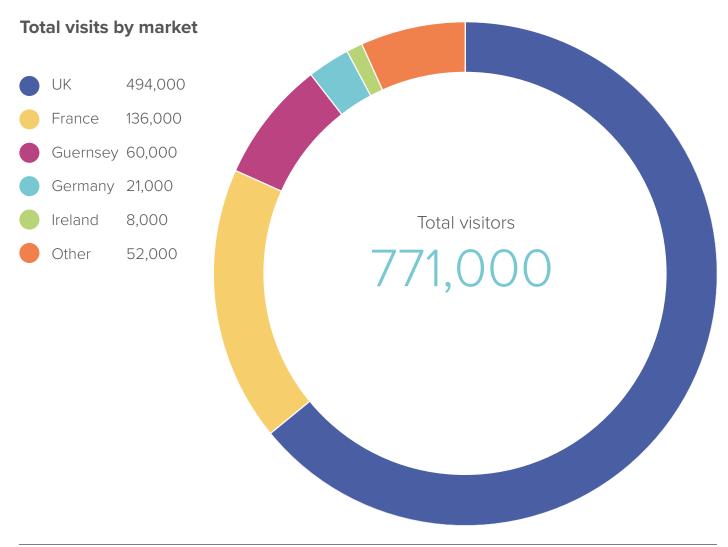
Connecting with visitors is our number one priority. Through everything we do, we generate demand by inspiring people to visit Jersey.

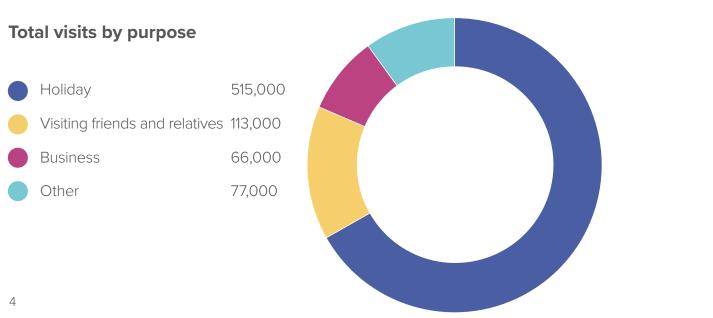


Contents

2019 highlights	05
Chairman's foreword	06
CEO statement	80
Our engagement - supporting our industry	10
- Product	10
- Key highlights	14
- Events Jersey	16
- Marketing	18
- Trade	26
Financial report	30

2019 Highlights







Total visitor spend

£280m

(highest since 2011) (4% higher than 2018)



Total visitors

771,000

(6% higher than 2018)



Visitor nights

2.74m

(1% higher than 2018)



Visitor spend

directly attributable to Visit Jersey's work

£41.2m

(Up from £36.4m in 2018)



First time holiday visitors

50%

(2% higher than 2018)



Overnight holiday visitors (staying leisure visitors)

439,000

(6% higher than 2018)



Referrals to commercial partners

852,000



Jersey.com page views

5.7m



Trade partners supported

70+

Chairman's foreword

With all that has happened over the last few weeks it is easy to forget that 2019 was a year of continued progress. We welcomed 770,700 visitors staying in excess of 2.7 million nights on our island who went on to spend almost £280 million whilst they were here. At that point Jersey looked on track to meet the 2015 destination plan aspiration of 800,000 visitors by 2020 giving increased confidence in the goal of 1 million visitors by 2030.

Clearly we are now in a very different world where survival of our sector become the priority for all involved. The team at Visit Jersey are dedicated to doing all they can to navigate all aspects of Jersey tourism through the many challenges presented by the Covid-19 pandemic to minimise the very real potential for the permanent decline of this crucial sector.

Money

In 2019 we received a grant of £4.9 million (2018- £5 million) a 2% reduction in nominal terms and getting on for nearly 5% when inflation is taken into account. Expenditure was kept under tight control and below the level of 2018 as we used our digital channels to best effect and where feasible brought resources in house to save money. A major marketing initiative ended up being delayed to 2020, which meant we ended up with a modest surplus of £323,601.

Governance

The board continued to both support and when appropriate challenge the executives. We met on eight occasions as a full board, the audit committee met four times and the remuneration committee once. Outside of our formal work a number of board members were involved in the search and recruitment of our new CEO Amanda Burns who starts in July.

We continued to progress the recommendations of the Comptroller & Auditor General including an external review of internal controls, which we had hoped to conclude during the first quarter of 2020. Unfortunately the completion of this review was delayed by recent events. The preliminary findings identified some opportunities for improvement, which will be worked on in the coming months and the final report will be presented to our audit committee before the end of the current year.

As in previous years we were fortunate to have representatives from Government attending our Board meetings. As well as providing an important element of oversight for the taxpayer these representatives were a constant source of advice and an excellent way to maintain

communication between the company and Government. I would particularly like to thank Darren Scott who has been involved with Visit Jersey since its inception for his advice, support and when appropriate constructive challenge.

In 2020 board members have volunteered to reduce their fees by 50% from April 1st 2020 as a small token of our solidarity with the sector. I record my thanks to my fellow non-executives for this gesture and for their hard work in 2019; Visit Jersey is extremely lucky to have such a dedicated and talented group of people.

Early in 2020 we commenced the recruitment of two new board members but in the light of the Covid-19 pandemic have decided to suspend this until the autumn; Mike Graham will now step down later this year. There was clearly a lot of interest in the vacancies and we expect more when we resume the recruitment.

People & partnerships

We are so lucky to have such an amazing team of executives at Visit Jersey; they love their job of inspiring more people to spend at least some of their leisure time in our special island. Their campaigns have always been imaginative and with value for money at the forefront of everyone's minds, I record the board's sincere thanks to all of them.

Over the years we have also benefited greatly from a close partnership with Ports of Jersey. During 2019 Alan Merry attended a number of our board meetings as Interim CEO of Ports until Matt Thomas joined as the new CEO of that company. I record our sincere thanks to both Alan and Matt for their advice and support for our work.

A successful tourism industry is all about working together and we are fortunate to have seen so many partnerships grow over the years. I would particularly like to recognise the work of the Jersey Hospitality Association led by Simon Soar, which has been even more valuable than usual over the last few weeks.

For the first 5 years of its life, Visit Jersey has been led by Keith Beecham who is retiring in the summer. Keith has done a simply amazing job; he has quite literally built this organisation from an aspiration to a workable and successful reality. Although Keith joined us with vast experience of destination promotion, he has always taken care to listen carefully and when ever possible take on board the points of view of all stakeholders. The success of his approach has been clear for all to see, in an industry which is so fiercely competitive we have moved from managing decline to sustainable growth, which I am confident will resume if we can get through the present crisis.

After an extensive process overseen by the Jersey Appointments Commission we were delighted to be able to appoint Amanda Burns to succeed Keith as Chief Executive. Amanda brings extensive experience of our sector, and although Keith is going to be a hard act to follow, the board is confident we have found a very worthy successor in Amanda

The role of tourism in Jersey

The board of Visit Jersey believe passionately in the value of the sector, a value well beyond a simplistic view of the Gross Value Added of the Hotels & Restaurants sector. I make no apology for again repeating the many benefits of a vibrant visitor sector, which go far beyond the purely economic: -

- Tourism is synergistic with our financial, digital and agricultural industries in supporting many high-quality hotels and restaurants.
- Visitors underpin the viability of numerous routes by air and sea for the benefit of local residents whether on holiday or business. After all 65% of passengers coming through our ports are visitors.
- Visitor spending is crucial to the financial viability of many leisure facilities enjoyed by Islanders, a number of which are operated by charities.

- Visitor spending generates around £27 million of extra turnover for retail helping keep our high street vibrant
- Visitors spend money on our taxis and buses supporting their viability.
- Visitors paid GST of some £14 million in 2019, about 14% of the take. They also paid duties on fuel, alcohol all of which fund public services for locals.
- Customer service training and work ethic gained working in the tourism sector is almost certainly the foundation of many successful careers in other sectors.
- Tourism provides all-important diversity to ou economy.

Our sector was one of the first to feel the impacts of Covid-19. As I write this it is quite easy to see the short-term impact, which has been devastating, but the longer-term impacts are harder to gauge. As an eternal optimist I believe that even in the medium and long-term people will still want to enjoy a holiday. Jersey may be a small island but it certainly has many big attractions for potential visitors. If we can all get through the Covid-19 crisis with the minimum of damage to our capacity in terms of accommodation, attractions, restaurants, cafes and of course the all important access routes to our island, I am confident growth will be resumed.

We are fortunate and grateful that Senator Lyndon Farnham has been a long-standing supporter of tourism in Jersey and are very hopeful that he and his colleagues will continue supporting us and crucially investing boldly in the recovery when it comes.

Kevin Keen
Chairman of Visit Jersey
5 May 2020

CEO statement

I am writing this working remotely during the Covid-19 crisis when so many businesses and livelihoods are threatened, and hard and challenging decisions are having to be made. However, it is also bringing out people's resilience, commitment and passion for what they do, how they do it and who they do it for - our island community and our visitors. Our visitor economy staff are showing what value to guests and community really looks like.

Tourism is a resilient industry; the crisis will fade and visitors will return to our special island. We and our partners will rebuild the Jersey visitor economy.

2020 is my final year as CEO of Visit Jersey. It's been five years of hard work from so many who contribute in the visitor economy. In addition to all the travel and hospitality firms, I wish to thank our community, voluntary and charity bodies and the Government of Jersey. They all help, in myriad ways, the world to fall in love with Jersey and deliver wonderful experiences for our visitors.

Our vision is to help the world fall in love with Jersey and Jersey to fall in love with tourism. Our role, set out in 2015, 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.
- Advise government and the industry on tourism issues, particularly those affecting our competitiveness.

The hard work of Jersey tourism and hospitality firms is paying off. Working together we will recover from Covid-19 and get back on track to achieve our ambition of 1m visitors spending $\pounds500m$ by 2030. In 2019 the total number of visits reached 770,700, which was 6% higher than in 2018. This is the highest volume of visits since 2002. Visitor spending during the year totalled $\pounds279.8m$. In real terms, this is the highest level of visitor spending since 2011. The world is increasingly falling in love with Jersey. The Net Promoter Score for holidaymakers, a measure of consumer sentiment was 58, up from 55 in 2018.

We are pleased to record that more visitors are enjoying Jersey off-season. Over the last three years our short break campaigns have targeted off-season travel. In 2019, staying holiday visitors visiting outside of the main April to September season accounted for 24% of all staying holiday visitors, a percentage not seen this century. Overall, all year-round staying holiday visitor numbers grew 6% on 2018.

The Jersey Destination Plan published in 2015 initially set the target of achieving visitor numbers of 782,700 and \mathfrak{L}^2 294 million of visitor spending by 2019 (with the eventual aim of reaching one million visitors spending \mathfrak{L}^2 500 million by 2030). On this basis we have achieved 98% of this visitor number target and 95% of the visitor spend target as at 2019.

Visit Jersey's core duty is to excite potential visitors about Jersey. We use social media, jersey.com, and digital and PR communication platforms to inspire an interest in Jersey. In 2019 we recorded 5.7 million page views. Our PR work generated over 1,000 articles and we teamed up with over 30 travel trade partners from the Channel Islands, UK, Ireland, France, Germany, The Netherlands, Austria and Switzerland. We have a tiered partnership programme and worked with over 31 suppliers such as hotels, airlines, attractions, shops, bars and restaurants. Our marketing campaigns; explorers wanted, summer is here, serving up island life and rediscover yourself, delivered a combined return on investment (ROI) of 8.4:1 (7.6:1 in 2018).

Our product team worked with hospitality and tourism providers throughout 2019 to ensure the experiences visitors received were great. Building on research insights such as the Visitor Experience Research and the Product Audit, we worked with the Product Action Group to identify how we collectively can improve Jersey's tourism assets. Drawing on these insights we launched three "signature experiences"- field to fork, liberation 75, and rewild yourself.

Our Tourist Information Centre (TIC), at the Bus terminal provides world class information support answering on average each month, 4,000 enquiries. Especially pleasing was that over half of the interactions (56%) were with first-time visitors to Jersey. In 2018 this was 28%.

Our trade team based in the UK, and Germany

represented Jersey at two of the world's leading travel trade shows ITB and WTM, with over 160,000 visitors. Visit Jersey hosted over 20 key trade events throughout the year and participated in 500 plus sales industry meetings. We worked with trade partners on 20 campaigns and over 300 travel agents completed training on destination Jersey. We retendered for our German account and appointed TMR. I would like to record my thanks to Expert PR, our German representative agency, who had been helping Jersey in Germany for many years.

One of our most cost-effective and unusual promotions was our Christmas Jersey cows, which featured in media all around the world. The video has been viewed thousands of times and brought a smile to the faces of our community.

Our Government invested £4.9 million in tourism through Visit Jersey. This was spent marketing Jersey year-round and supporting our suppliers. We generated 775,422 sales referrals to businesses from jersey.com (up 1.2% year on year), we subsidised our suppliers' attendance at travel shows such as ITB Berlin and we provided a free-to-list service on jersey.com.

Our successes result from 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.

The Jersey visitor economy is experiencing real turmoil at the time of writing. People have not fallen out of love with Jersey, they are just not travelling and taking holidays. But the evidence of the last five years gives me confidence that Jersey will bounce back. With our island passion and great experiences awaiting visitors we will seize opportunities and rebuild our industry and cement Jersey as #theislandbreak for all seasons.

Keith Beecham CEO, Visit Jersey 5 May 2020



Product

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.



Subscription growth

5.52%



Distribution to industry partners = over 2,550

+5.5%



Increased frequency: 33 trade emails sent in 2019

+65%

(YoY from 20 trade emails sent in 2018)



Average open rate 29.23%









Supplier partnership programme

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

34 partners – Gold and silver partners from the accommodation, attractions, activity providers and restaurant sectors.

In consultation with industry, we improved the reporting for 2019 and refined the key benefits of the programme ahead of 2020.

New for 2019 – A range of printed cycling and walking guides

This year we launched four walking and four cycling printed guides showcasing different parts of the island and incorporating the Jersey National Park. Distributed from the Tourist Information Centre, they received positive feedback from on island visitors.



Key highlights

Cobranded partnerships

Visit Jersey was the world's first Destination Marketing Organisation to partner with the sports app Strava on a campaign to bring a bookable tourism experience to Strava's running community. We had significant engagement with:



2 million miles run



25,000 participants



10.1 ROI

With an ROI of 10:1 and a 14% increase in visiting marathon runners, 2,711 incremental visitor nights and a £275,255 incremental visitor spend.

Tourism trailblazers - FAM trip to Kent

We recognise that our competition isn't standing still, and neither should we. We need to continually drive innovation to compete in the global marketplace. To adopt a forward-looking view, Visit Jersey teamed up with Visit Kent to give on-island product partners the opportunity to experience Kent's year-round successful tourism product, draw on best practice and guide what good looks like. Learnings were shared industry wide.

Signature experiences

Celebrating Jersey's unique offering was at the core of launching our very first Signature Experiences. Designed to showcase the unique experiences that characterise the distinctive personality of the island break and encourage more visitors to Jersey. The aim was to assist suppliers with the development of their products, with a goal to strive toward immersive and authentic experiences, and growth of the programme over the longer term.

Field to fork – As a small island famous for its food, Jersey's bursting with flavour. But why just serve a meal when you can serve a memory?

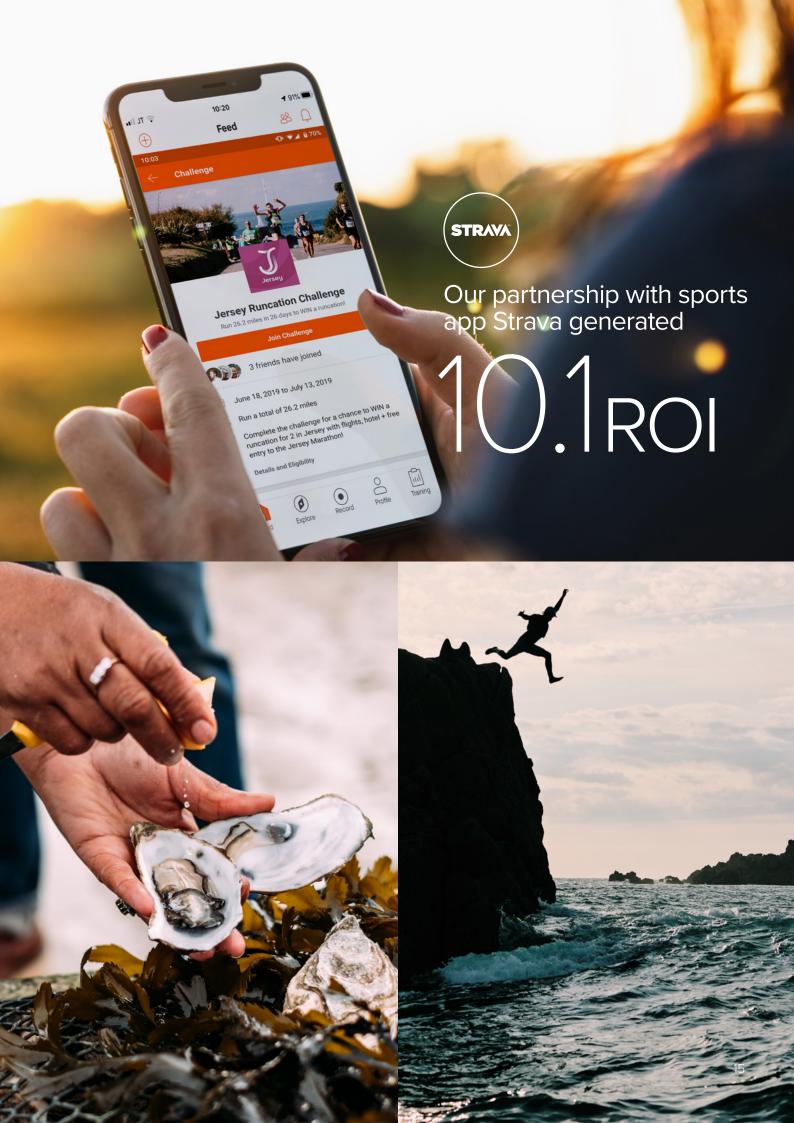
Rewild yourself – The core of the 'rewild yourself' product celebrates the island's power to refresh and revitalise, reconnect and rediscover through a reintroduction to nature.

Pop-in with product

This year saw us launch a monthly pop-in with product session which were attended by 120 stakeholders throughout the year. An informal opportunity for Visit Jersey's product team to share insights, opportunities and campaign activity with industry partners.

Team Jersey staff pass

In partnership with the Jersey Hospitality Association, we launched the team Jersey staff pass, an exciting new initiative that encouraged tourism and hospitality staff in Jersey to explore the island's tourism attractions and experience activities first hand. In 2019 over 500 team Jersey staff passes were issued to hospitality staff so they could discover the island break and share their experience with visitors.



Events Jersey

Our ambition is to unleash Jersey's potential to win, host and deliver great events and fill the island in the shoulder months.

Business events

In partnership with Hills Balfour, Events Jersey hosted an educational trip on-island for business event buyers in April, welcomed prospective buyers at key on-island events and organised a sales mission to London in November.

Events bid for and won

- The Confederation of Independent Football Associations (CONIFA) AGM
- Rat Race Ultra Tour of Jersey

Home grown events

We provided ongoing support to over 80 event organisers. This includes event framing across Visit Jersey channels, such as Jersey's Ultimate Adventure Events, Jersey's Spring Food Festivals, and Jersey's Summer Music Festivals.

Events Jersey incubator marketing programme

We launched this programme to help generate demand off-island to attract visitors in the shoulder months through marketing. Supported events partners included Art House for the watercolour painting retreat, Rat Race's Ultra Tour of Jersey and Luxury Jersey Hotels' Taste Jersey.

Super league triathlon

Jersey extended its partnership with super league triathlon for a further 3 years. Island Global Research found over 2,060 visits were attributed to the 2019 event, estimating an additional visitor spend of £751,000

Breca swimrun

Breca swimrun continued its partnership with Jersey. Last year saw the event grow from 144 race participants to 222 participants in 2019. 43% were off-island participants.

Events.jersey.com marketing

Events Jersey continues to refresh events.jersey.com and marketing assets to inspire event organisers to consider the island. Fresh content for 2019 has included the curation of:

- Three downable itineraries for meetings, incentives and conferences^[1]
- New case studies such as Digital Tourism Think Tank Campus and the EAZA Conservation Leadership Conference
- A print-friendly event calendar for tour operator programme planning and on-island event organisers to refer to when scheduling events



Marketing

Marketing strategy



Getting

Evolve marketing output to deliver campaigns and content on a 12-18 month rolling programme



2 Align best prospects to best channel

Develop a data driven approach to marketing to deliver the right message to the right people at the



3 Bring brand Jersey to life

Leverage the destination brand proposition to connect visitors to an emotive bookable experience.



One team, one strategy

Product, marketing, trade Aligning the brand to the promise.





PR - #theislandbreak across the media

We continue to create proactive PR campaigns to generate noise and drive destination awareness across our target media titles. We craft world-class memorable media experiences that capture the full essence of #theislandbreak

Where we are being covered:

Reach: With over 1,010 articles published across our target media, our audiences had over 3.5 million opportunities to see a Visit Jersey message during 2019.

Relevance: Our content has featured in several top tier publications, positioning Jersey as the island break of choice across our key source markets (UK, France and Germany).

Quality: 100% of our coverage was favourable, 80% of coverage featured a core message, and 82% featured a call to action to encourage and inspire the reader to find out more about the island or a specific product partner.

Creating news with:

- The Telegraph, The Times, Sunday Times, Time Out, Marie Claire, The Sun, Daily Mail (Saturday) & Mail Online, Heat Magazine, Daily Record - Always on Media activity
- BBC News, Sky News, the Johnathan Ross show, MSN, Yahoo News, The Times, The Telegraph to name but a few – Jersey Christmas Cows

Over 1,010
articles published in target media

Audiences had over

3.5m

opportunities to see

100% of coverage was favourable.

Core messages featured in

Digital channels

We continue to create and nurture relationships through personalised and targeted content across our digital platforms. We continue to collaborate with industry to strengthen our offer and provide better access to Jersey experiences.

Email

Email distribution levels increased significantly during 2019, increasing by 75% overall which led to an increase of 50% more email opens and a 102% increase in clicks.

75% increase in distribution

500/o increase in email opens

102% increase in clicks

Email database

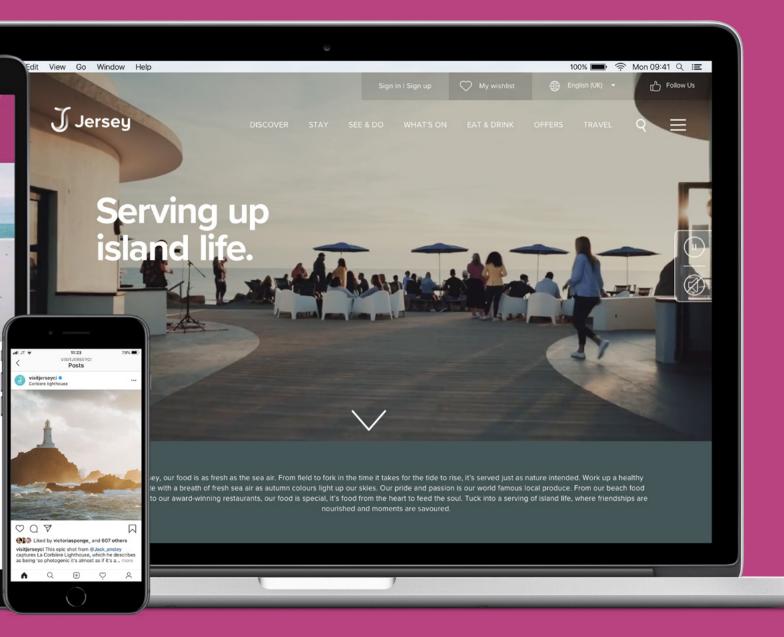
398,199 up 11%



Social media

Overall 128,019 social audience/followers. An increase of 10% YoY (from Jan 2019 vs. Jan 2020). 100/ increase YoY

million views on jersey.com



Paid social

Paid social has seen significant gains with sessions up 35%. Conversion rates of both paid and organic traffic have improved during 2019 as campaigns and activity were continuously optimised.

35% increase in sessions

Campaigns

We launched several multi-channel creative campaigns during 2019, all of which were designed to inspire visitors to book their very own island break. Using a combination of creative videos, inspirational photography and destination advertorials we generated brand awareness and engagement across our core markets, which in turn led to increased business for Jersey and on-island partners





Serving up island life

We aim to promote Jersey as a year-round destination, so like our famous island food, this campaign isn't just fresh for one season. We embraced our unique food story and fresh experiences to give visitors a truly authentic serving of island life.

This campaign was our first step away from seasonal campaigns and enabled us to deliver an authentic taste of Jersey that visitors can enjoy all year round whilst delivering upon our strategic objective of 'getting ahead'. The first campaign to be delivered in this new format, we achieved a combined 6:1 ROI.

For more information visit: jersey.com/freshly-served

Rediscover yourself

Developed to be a social first campaign targeting our grow 1 & grow 2 audiences, the 'rewild yourself' activity celebrates the island's power to refresh and revitalise, reconnect and rediscover through a reintroduction into nature

Deployed as a tactical digital campaign through social media and trade marketing channels to drive awareness, engagement and ultimately conversions throughout the autumn period. Brand partnerships with Wanderlust and Secret Escapes enabled us to further amplify the message and serve up the right message to the right people at the right time.

For more information visit: jersey.com/rediscover-yourself

Christmas cows

Partnering with local dairy farmer and Christmas fanatic, Becky Houzé, we captured a piece of content and suite of imagery of Becky and her girls – Carol, Holly, Mary, Noelle and Mariah Dairy – in their festive best.

The imagery was distributed to national and consumer media. The activity went viral, and exceeded all of our expectations and has been the most successful single piece of PR activity to date. With our festive beauties reaching as far as Australia and New Zealand. Closer to home, they featured in media titles as well as the BBC news, This Morning, The Jonathan Ross show to name but a few.

For more information visit: jersey.com/jersey-cow-christmas-jumpers





Trade partner joint marketing campaigns

Campaigns were agreed and contra marketing secured with over 20 key travel partner examples including:

- British Airways
- Cl Travel
- Jet2
- Premier Holidays
- Secret Escapes
- Travelzoo
- Wanderlust
- 220 Triathlon Magazine

Trade events

ITB – We arranged a dedicated Channel Island stand in conjunction with Visit Guernsey. Supporting the event were 10 on island partners and over the duration of the exhibition more than 49 trade and PR meetings were held.

We organised a dedicated Channel Island dinner for 65 attendees, the objective being to engage new industry partners and thank loyal tour operators for their ongoing support.

Dedicated Jersey trade roadshows were held with onisland partners in Belfast and Dublin to train and educate over 51 travel agents about the destination and supporting products to ensure ongoing support.

Over the course of the year four dedicated trade stakeholder events took place with key trade partners to gain industry engagement, intelligence and insight and to share business plans and campaign activity.

Co-partner events

Visit Jersey joined Ukinbound on their WTM stand, where over 30 meetings were held with new and existing travel industry suppliers and buyers.

Trade joined the Explore GB conference in Harrogate where meetings were held to develop business opportunities with 38 buyers from Europe and beyond.

AITO meets the media – Over 20 meetings took place with well-known UK travel journalists.

Antor meets the trade events took place in London, Glasgow, Manchester and we met with 175 tour operators and travel agents.

Visit Jersey attended the UKinbound conference in Glasgow where 20 tour operator meetings were held, where industry insights were shared and over 20 networking meetings were held.

VIBE – 15 meetings were held with Visit Britain's inmarket destination managers to gain insight and establish destination opportunities.

Visit Jersey and Condor Ferries partnered up and hosted an event at the Ukinbound summer ball to thank our trade partners for their on going support.

To share Visit Jersey's end of year performance and future campaign plans, Visit Jersey hosted an afternoon tea for our industry partners in central London.

Trade familiarisation trips

16 Trade partner familiarisation trips supported with itinerary ideas and product insight.

Visit Jersey dedicated fam trip showcased the island and its product offering to our prospective and loyal partners. The trip achieved a net promoter score of 80. All respondents said the trip 'exceeded expectations'.

Our people

Our board



Kevin C Keen Chairman



Keith Beecham Chief Executive



Matthew ThomasBoard Observer



P W Burke



Tim Crowley



Mike Graham



Catherine Leech



Sam Watts Left 22 May 2019



Amanda Willmott



Keith Beecham Chief Executive Officer

Our executive team as at 31 December 2019



Rachel Winchurch
Executive Assistant to CEO



Ruth Perchard Analytics and Evaluation Executive



Oliver Archbold Head of Corporate Services



Louise Ashworth Head of Marketing



Meryl Laisney Head of Product



Sarah Barton Head of Trade



Georgina Matthews Marketing Manager



Lyndsey Soar PR Executive Job Share



Edward Le Gallais Campaign Executive



Jennie Smith Product Executive



Charlie Watkins
Product Executive



Amy Moore Events Executive



Clare Robinson
PR Executive



Rebecca Collins
PR Executive



Sophie Jeantils Marketing Executive

Financia report

	2019		2018	
	£		£	
INCOME				
Income	4,900,000		5,000,000	
Other Net income	72,299		73,217	
		4,972,299		5,073,217
OPERATING EXPENSES				
Marketing costs	3,190,299		3,575,819	
Staff costs	821,405		886,623	
Other operating costs	636,994		663,413	
		4,648,698		5,125,855
DEFICIT/SURPLUS FOR THE YEAR		323,601		(52,638)

Visit Jersey

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