

Discover.

The island break.



**At our core,
we are storytellers;
creating and curating
great stories about
Jersey that inspire,
giving people new
reasons to visit.**

Keith Beecham, CEO Visit Jersey

Contents

Introduction - Senator Lyndon Farnham	p.	02
Chairman's Foreword - Kevin Keen		04
Our Role		08
Our Operating Environment 2016		14
The Tourism Landscape		16
- Launching Our Destination Brand		18
- Launching Events Jersey		20
- Professionalising Data Capture		22
- Tourist Information Centre		26
Supporting Our Industry		28
Stimulating Consumer Demand		32
Our People		64
Financial Report		69
Visitor Economy Profile		72

Introduction

The States of Jersey Government is committed to promoting increased tourism to Jersey, and a strong and thriving visitor economy creates jobs and generates economic growth for the island. Visit Jersey has had a strong year; they launched a new Jersey destination brand - #theislandbreak - and worked with partners to maximise the impact of their marketing campaigns. I am pleased to see Jersey is being promoted as a holiday destination across all the seasons and the early results are encouraging. Over half of holidaymakers last year were first time visitors. Historically the number was slightly less than 50%. This is positive news.

I would also like to thank all the people who work in tourism and hospitality, both in the public and private sectors. Their hard work results in our visitors leaving with great memories and as advocates for the island we are privileged to call our home. We have set Visit Jersey challenging targets in the years ahead and I look forward to supporting their, and the industry's efforts to build a sustainable visitor economy.

Senator Lyndon Farnham



Chairman’s Foreword

This is my first report as Chairman of Visit Jersey and it is wholly appropriate to start it by paying tribute to my predecessor John Henwood MBE. John’s vision, passion and determination to get the island to fall in love with tourism again was not just pivotal in the genesis of Visit Jersey but played a part in the journey of recovery for the sector which started in 2015 and gained momentum in 2016. The industry, and I believe Jersey itself, really owes John a big debt of gratitude.

2016 saw the early signs of what could be possible as Keith Beecham led his team in their first full year of operation. It was a busy year full of positive change from new branding and improved measurement systems to new offices and new arrangements for Jersey’s visitor centre. In 2016, we were delighted to welcome 356,000 people for a holiday to our wonderful island, the highest number for five years and ahead of our target. The board was also encouraged by visitor satisfaction data, evidenced in a net promoter score of 67 (an impressive score; destinations typically rate around the 50 mark) and the fact that albeit by a small majority, more visitors were coming to the island for the first time than were returning. Although I should, of course, emphasise that all visitors are very welcome to return as many times as they like, as we know Jersey is far too special to only visit once. Total visitor numbers of 692,000 were slightly below last year and our long-term target. This was due to reasons beyond our control and an early reminder that however hard we work, external factors can always impact us and that progress towards our objectives is unlikely to be linear.

Our total costs of marketing Jersey as a visitor destination in 2016 were £5.1 million; these cannot be directly compared with 2015, given that we only commenced operating in April 2015 and with a much-reduced budget. In contrast, total visitor spending in Jersey was estimated to be some £228 million during the year which is spread widely around the island, from hotels to taxi drivers, restaurants to retailers and of course to government agencies in the form of GST, duties, income tax and the like. We estimate that the GST paid by visitors on its own was more than double that of the grant of £5.1 million provided by the Economic Development, Tourism, Sports and Culture Department to Visit Jersey, proving what an

attractive return the sector can provide. Although still some way behind the island’s finance sector, and rather more difficult to measure, our economic productivity is improving and there is plenty of scope to improve it further, through the various initiatives set out in the Jersey Destination Plan and the recent report by Tourism Economics. Of course, the benefits of a healthy tourism industry for Jersey are far more than simply economic, they:

- Work in synergy with our financial services industry in supporting many high-quality hotels and restaurants;
- Support travel to numerous destinations by air and sea for the benefit of local residents whether for leisure or business;
- Underpin the financial viability of many of the leisure facilities enjoyed by islanders through visitor spending; and
- Almost certainly help to build a foundation for many successful careers across other sectors through customer service skills and a strong work ethic gained from experience in the tourism industry.

To achieve this, industry participants need access to the resources necessary to deliver the level of service their customers demand, most importantly people with the skills and desire to work in our sector. According to the Jersey Statistics unit the overall head count of the 'Hotels, Restaurants and Bars' sector was 6,770 in June 2016, almost identical to the 6,740 it was in June 2001 and remains very seasonal. So the increase in island population from 87,000 in 2001 to 103,000 in 2015 cannot be the fault of the tourism sector, although that does not stop the industry sometimes appearing to get the blame for the increase and in turn bearing the brunt of Government actions intended to control it. We appreciate population control

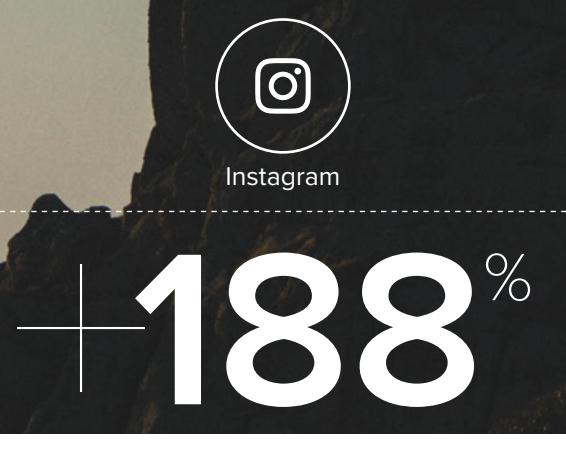
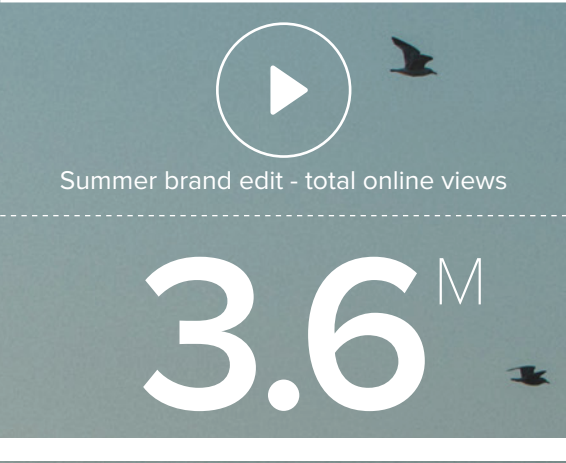
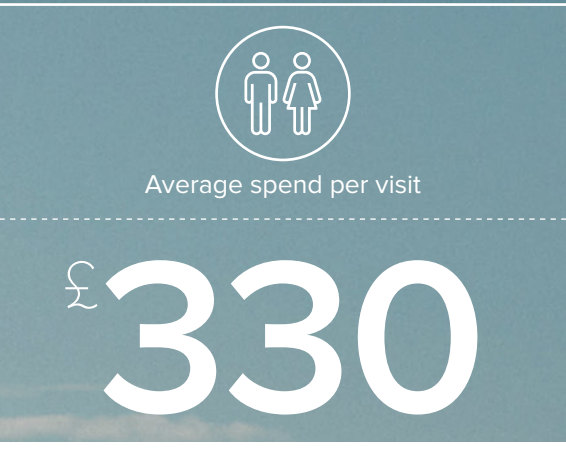
is of great interest to many islanders and is therefore something politicians want to focus on but it is also a complex issue where short term solutions can be really damaging long term. Around this issue and the industry generally are any negative impacts that Brexit may cause which will be closely monitored by us. We will also work with the Jersey Hospitality Association, other trade bodies and Government departments to ensure these are understood and considered advice provided.

Tourism may be growing globally but competition for this growth is intense with few barriers to entry. So for those in Jersey who wish to benefit from the opportunities growth brings there is a need for constant improvement in quality, agility and investment by all stakeholders including Government. The Board of Visit Jersey is confident the target of one million visitors and £500 million of spending by 2030 is still eminently achievable but it won’t be easy. Effective collaboration and continuous innovation by the many industry players will be key to success.

I started this statement with thanks and would like to end on the same theme by recording our sincere gratitude to our many partners and stakeholders in the industry. To the business owners, to the thousands of people who work in tourism, to our Minister Senator Lyndon Farnham and his officers, and of course to the fantastic team of people led by Keith Beecham. Each of them is playing a crucial part in building a vibrant future for an industry that already adds huge value to Jersey and with the potential of much more to come.

Kevin Keen,
Chairman of Visit Jersey
4th April 2017

2016 Highlights



Our Role

Visit Jersey began trading on 30th March 2015 and we completed our first full year of operations in 2016. 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. 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.

2016 was a busy year for Visit Jersey as we set about creating an organisation capable of addressing the 21 recommendations detailed in the Jersey Destination Plan. It was a year of substantial achievements across a wide range of areas.

Keith Beecham,
CEO, Visit Jersey
4th April 2017

Jersey welcomed almost 356,000 people for a holiday to our amazing island during 2016. This was the third year of growth and the best for five years and beat our 2016 target of 352,000 staying holiday visitors, a growth of 2.6%. More first time holiday makers are coming. We are encouraged that a little over half, 53%, of those visiting for Holiday/Leisure said that this was their first visit to Jersey. Historically, this figure was slightly less than 50%.

Total visitors (which includes day trips, visiting friends and relatives, and business travellers) were 692,000, 3.6% below 2015. This was just over 5% below the 733,000 target for total visitors. Staying business and non-leisure day visitors were down by 21,000 (17%) and leisure day trippers by 3,000 (3%). Staying holiday visitors from the UK increased 7% and Germany 6%, whilst those from France declined 6% and from Guernsey declined 22%.

Marketing Activity

There are three broad strands to our activities; marketing, trade and product. Throughout the year we commissioned research to help inform our thinking and actions. This research was also shared with our industry partners. At the beginning of 2016 we concluded our winter marketing campaign. It delivered a return on investment of 4.7:1 and delivered 4,582 referrals to our commercial partners. This was the first time we calculated a return on investment. This was done by sending consumers a short survey to demonstrate whether the marketing activity helped to ‘convert’ the respondent to choose a trip to Jersey. This new evaluation approach, now adopted for all marketing campaigns, is in line with that taken by tourist boards across the UK and is recognised by the National Audit Office as an effective way of understanding the success of destination marketing activities.

Perhaps the most important long-term marketing initiative was the development of a new Jersey brand. We worked with a world-leading branding agency - FutureBrand - and from Jersey - The Observatory and Oi - to roll out a new brand; an island of rediscovery.

In June, we kicked off our year one of a five year marketing campaign, in partnership with industry partners.

Digital channels to market feature heavily in our consumer campaign. However, we recognise that more traditional off-line channels and travel agents have an influential role too for some key customer segments. It's not digital first, but customer first.

Jersey.com was completely re-engineered to improve the customer experience and provide improved level of referrals to our partners.

We appointed One Green Bean to help us with our public relations efforts in the UK and we assumed the responsibility for Events Jersey from October.

The way we engaged with our industry changed. We created a Gold/Silver/Bronze tiered approach that could be tailored to the specific needs of individual partners.

At Destination Jersey in April, our island suppliers met with 62 buyers and media representatives from eight countries. Over 1,000 15-minute appointments were completed. We are grateful to the Jersey Hospitality Association for their Destination Jersey support.

In Germany we co-funded a number of co-operative initiatives to sustain and build route connectivity; often working with Visit Guernsey to promote travel to the Channel Islands from Germany.

We modernised the way that information is collected on the volume and value of tourism to Jersey. An Exit Survey replaced visitor registration cards. This new approach will help us understand not just how many visitors we welcome, but also the degree to which they contribute to the local economy, support local employment, through visitor spending and what they think about their Jersey experience.

Operational Achievements

We moved both our back office and Tourist Information Centre during the year. Working in partnership with The Ports of Jersey and Jersey Heritage, visitors to the island were served from within Jersey Museum sited at the Weighbridge from February 2016. Jersey provides information on-island to help visitors feel a sense of welcome and get more from their stay.

Our back office reduced in size and became open planned to help with communication and team-working. The bulk of our business systems were renewed or replaced as we moved off the States of Jersey IT infrastructure. I am thankful for the support States officers provided. Our customer relationship, digital asset management and content management systems are all new and cloud-based. Staff continued with their individual personal development linked to the 2016 Visit Jersey Business Plan; much of this was centred around improving our digital knowledge and capabilities.

In October, we established Events Jersey with the employment of Suzanne Kirk as Events Jersey Business Development Manager. We can also report that Visit Jersey has provided accommodation and infrastructure support to John Garton of Genuine Jersey, who is co-located with us.

Our Role

Policy Matters

The Jersey Destination Plan, published in 2015, frames the challenges and opportunities facing the tourism and hospitality sector. We were pleased to consult throughout the year with States officers to help with the proposed revision to the 1948 Tourism Law. Public consultation closed on 31st March 2017.

Visit Jersey worked with public and commercial organisations to help create a package of recommendations on creating a future workforce fit for purpose. In May, Visit Jersey presented to The States of Jersey Economic Policy Officer Group and the Political Oversight Group. These engagements provided a platform to discuss tourism matters with a wide range of political stakeholders, emphasising the value of the Jersey visitor economy.

In autumn, at a stakeholder meeting we introduced the early findings from Tourism Economics’ 'The Economic Contribution of Tourism to Jersey: The Productivity Opportunity' report. In 2017 we will discuss the report conclusions with our government and industry partners.

The Future

We now have a talented team in place, some excellent marketing agencies helping us and revitalised processes to manage our business. We have a board that is passionate, professional and supporting the executive team to deliver great results. But we are only at the start of our journey to revitalise the Jersey visitor economy. Destination marketing can often be fragmented in nature and we have a data-led approach that informs our thinking. We have pursued a partnership approach, with on and off-island partners, to further our ambitions for the Jersey visitor economy. This will not change in 2017.

At our core, we are storytellers; creating and curating great stories about Jersey that provide reasons for people to come to Jersey. We will maintain our partner-driven marketing to deliver opportunities for industry partners to work with Visit Jersey to support our objective of sustainable growth and productivity improvement for this vital sector of Jersey's economy.



It's not digital first,
but customer first.



We have a board that is passionate, professional and supporting the executive team to deliver great results. But we’re only at the start of our journey to revitalise the Jersey visitor economy.

Our Operating Environment 2016

In mid-2016 we changed the way we gathered information to help with our marketing efforts and help define the importance of tourism to policy makers within government. We moved away from using registration cards as the main way of collecting data to an exit survey. This allows us to harvest more information about who is visiting, why, what they did and what they think about their Jersey experience. Any change from one method of collecting data to another will result in a one-off interruption to the time series data but going forward Jersey will have higher quality data about our visitor economy.

2016 will be remembered as year where uncertainty ruled; Brexit, Trump, yoyoing exchange rates, falling then rising oil prices, falls and then gains on stock exchanges and heightened danger across the world as metropolitan centres witnessed acts of violence. Some signs that inflation was creeping back were noted and real disposable incomes saw little growth in the UK. Despite this, people kept travelling; worldwide tourism numbers grew and people travelled to other countries.

Here in Jersey, the weather was mostly benign and our air and sea carriers successfully connected us to our main gateways.

The Jersey Destination Plan sets out how, collectively our island’s tourism businesses and other parties could seek to capitalise on the tourism opportunity. Twenty one recommendations were developed and are shown opposite:

- Recommendation 1**
Commission an independent examination of the Jersey visitor economy to better understand the economic and social contribution of tourism. Engage with relevant government departments and agencies to highlight how policy decisions can impact the visitor economy.
- Recommendation 2**
The Jersey Destination Plan will aim to deliver growth, improve competitiveness and productivity of the tourism sector. Raise productivity by developing a year-round visitor economy. Improve tourism’s profile as a career of choice.
- Recommendation 3**
Jersey’s tourism export markets to be categorised into three clusters: 1 Nurture; 2 Grow; 3 Make.
- Recommendation 4**
Continue supporting leisure group business from the UK and Europe and search for additional ways to boost incremental growth.
- Recommendation 5**
Research to identify new sources of visitors from the UK & Europe.
- Recommendation 6**
Identify third parties active in potential make markets.
- Recommendation 7**
Research and develop a Jersey proposition.
- Recommendation 8**
Consult with and agree a marketing programme with Visit Guernsey that builds on the strengths of our joint identity where it makes sense.
- Recommendation 9**
Industry partners to be responsible for converting, taking booking and delivering compelling experiences. Visit Jersey to be principally responsible for identifying and warming up leads.
- Recommendation 10**
E-marketing and social media channels are key routes to market.
- Recommendation 11**
Serve up relevant, inspirational and informative content in the places in which Jersey’s best tourism prospects consume their media- users’ own social platforms and media channels across their purchase cycle.
- Recommendation 12**
Promote tourism within Jersey in an innovate, economic and efficient way.
- Recommendation 13**
Improve regional connectivity between Jersey, the UK and mainland Europe.
- Recommendation 14**
Develop the on-island transportation offering; public and private.
- Recommendation 15**
Develop tourism into a year-round visitor economy and increase the value of it.
- Recommendation 16**
Encourage the development and improvement of Jersey’s stock of accommodation to meet visitors’ needs.
- Recommendation 17**
From 2016 to 2020 deliver a thematic destination programme.
- Recommendation 18**
Support events-led tourism.
- Recommendation 19**
Identify and cultivate a small number of high profile events.
- Recommendation 20**
Encourage tourism businesses to be more digitally astute.
- Recommendation 21**
Implement closer working arrangements between government and its agencies and harness opportunities for greater cooperation and continuity of the Jersey 'brand' and messaging.

The Tourism Landscape

In a year when the unexpected just kept on happening, one fact that didn't change was that people carried on holidaying. The UN's World Tourism Organisation estimates that in 2016, the number of international tourism arrivals increased by 3.9% to reach 1,235 million. This represents an increase in the number of international overnight tourists (those who stay in a destination overnight for any reason) of 46 million, the seventh consecutive year of sustained growth following 2009's global financial crisis and a sequence of growth that hasn't been seen since the 1960s.

Across the whole of Europe, initial estimates put international tourist arrivals up by 2%, but this average hides a very mixed performance by individual destinations. Iceland saw 35% more international visitors than in 2015, Norway was up by 13% and Ireland enjoyed an increase of 11% - challenging the assumption that only destinations with guaranteed fine weather can grow their visitor economy.

At the other end of the spectrum, there's clear evidence that safety and security issues can dissuade visitors, with Turkey reporting a 29% drop in arrivals and France (the world's most visited destination) seeing a decline of more than 5%.

The UK looks set to have largely mirrored the European average, with an increase of around 3% in international arrivals in 2016. Many had forecast an immediate 'Brexit Bounce' with more holiday visitors taking advantage of very favourable exchange rates, but provisional figures indicate that in fact, it was trips to see friends and relatives that drove growth in overseas visits to the UK, with the number of holiday visits remaining broadly flat. The amount that visitors spent in the UK was unchanged (before allowing for inflation) at £22.2 billion.

Surprisingly, outbound travel by Brits doesn't appear to have been negatively impacted by a weak sterling. Brits took 7% more trips abroad in 2016 than the year before, and increased the amount that they spent on these trips by 11%. We're yet to see whether an increasing inflation rate predicted to outstrip growth in earnings during 2017 will have a dampening effect on where and when UK residents take their holidays.

Visitor choice has continued to expand with all evidence pointing towards the fact that Airbnb is stimulating new demand rather than abstracting demand from existing accommodation providers – competition helps those who want to flourish to enhance their offer.

All destinations face increased competition; exemplified by the fact that a decade ago there were 16,684 distinct air routes operating, compared to 21,762 in 2016, an increase of 30%. Looking towards 2017, there will doubtless be more of the unexpected but, according to the UNWTO panel of experts, we are set for another year of expansion for the volume and value of international tourism.

International tourism arrivals increased by 3.9% to reach 1,235 million in 2016.... the seventh consecutive year of sustained growth following 2009's global financial crisis and a sequence of growth that hasn't been seen since the 1960s.



Launching Our Destination Brand

Imagine the Jersey you love.
How does what you see and hear make you feel?

This was the question we posed to the people who know Jersey best - the people who live here. We felt that together, we had an opportunity to capture that feeling and remind past visitors of Jersey's special appeal and inspire a new wave of visitors to experience the island for themselves.

Where Jersey was once seen as a bright, vibrant destination, in 2016 we were facing associations that were less positive. But the perceptions that Jersey was an out-of-date destination that lacked relevance for today's travellers didn't do justice to Jersey's real appeal, what the island has to offer visitors, and most importantly how Jersey makes you feel.

After consulting widely with the industry, locals and visitors, our new destination brand launched mid-way through 2016. 'The Island Break' brand focuses less on features and more on benefits. It's about how the island makes you feel.

The Island Break - Brand narrative

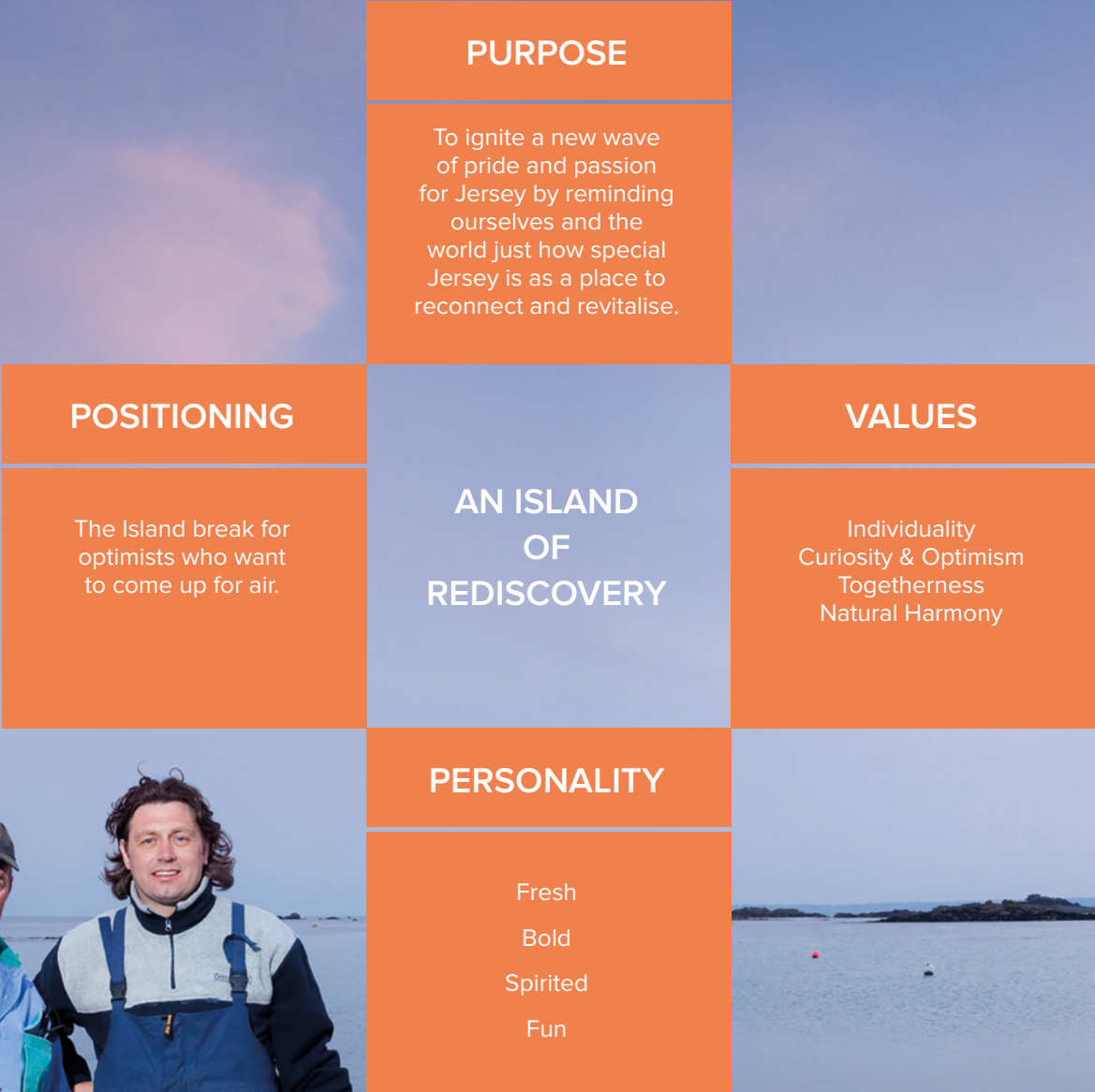
Jersey is an island shaped by the sea, where things are revealed - to any who choose to look.

Like our submerged coastal landscapes that are exposed to the fresh Jersey atmosphere every day, it's a place for you too to come up for air.

A liberating, joyful experience where you're free to reconnect and revitalise. Free to be together. Free to do so much (or so little).

Where you explore the past, love the present and can't wait for the future. Where friendships are nourished and bonds are strengthened.

And when the time comes for the tide to rise again, you're ready to dive back in. With a smile on your face and a freshness in your heart.



'The Island Break' brand focuses less on features and more on benefits. It's about how the island makes you feel.

Launching Events Jersey

Using the island’s spaces to help businesses, organisations and groups tell their own story.

Events Jersey was launched in response to recommendations within the Jersey Destination Plan to support event-led tourism by identifying and cultivating a small number of high profile events that could increase the value of a year-round visitor economy.

Events Jersey was launched in early October 2016 with the appointment of Suzanne Kirk as Business Development Manager. By providing leadership for the development of business visits and events-led tourism, in the short to medium-term, Events Jersey will identify potential partners, product opportunities and markets, driving visitation in the shoulder months.

Over the longer term, the aim of Events Jersey will be to create a legacy that can deliver sustainable growth in business visits and events that will contribute to our visitor economy.

2016 Achievements

During 2016 the key focus and activity was to evolve our proposition, and to:

- Meet with key stakeholders and influencers both on and off-island, carry out face to face research, scope opportunities and assist in evolving Events Jersey’s strategy.
- Develop a business website plan to provide a functional ‘shop window’ of all our venues, capacities and event spaces.
- Attend a select number of important industry exhibitions attended by event buyers, to network and gauge potential demand.
- Meet with Economic Development, Tourism, Sport and Culture (EDTSC) and Jersey’s government to identify the legislation, barriers to event growth, change required to streamline processes and ‘best practice’ models for events in Jersey. This process is ongoing.

Creating a legacy that can deliver sustainable growth in business visits and events that will contribute to our visitor economy.

Professionalising Data Capture

Improving how we measure tourism performance

During 2016, we made a number of strides to improve our understanding of Jersey’s visitor economy, and how effectively it is performing. Mid-way through the year we phased out the Visitor Registration Card system. The old system was a burden on accommodation businesses while only being able to deliver partial insights, for example it failed to capture any information relating to around 40% of all visits - anyone staying in unregistered accommodation or just here for a day was ignored. The approach also didn’t tell us what visitors do while they’re here, whether they’re leaving as an advocate for our island, and crucially how much they spend during their stay.

Not only is there a need for a regular flow of data on the volume and value of visitors to a destination, but there’s equally a need to develop a clear view as to the contribution that tourism makes to the local economy. In 2016, Visit Jersey commissioned Tourism Economics to undertake a detailed analysis based on internationally agreed standards, to establish the true contribution that tourism makes to Jersey’s economy, and also to examine the ways in which the sector can become more productive.

We have been working closely with our accommodation sector to encourage greater enrolment with STR, the benchmarking survey that enables hoteliers to gain a richer understanding of how well they are performing. In addition to looking at occupancy rates, STR enables accommodation businesses to benchmark other key indicators such as the average daily room rate and the amount of revenue earned per available room.



This allows businesses to compare their performance with accommodation sectors in other regions on a ‘moment in time’ basis, as well as getting insights into longer-term trends. Around half of the Jersey room stock, operated by establishments that meet the criteria for being part of the STR analysis, is now enrolled.

Jersey is blessed with a wide range of visitor attractions that both entertain and inform our visitors, and Visit Jersey has worked with the Jersey Attractions Group to undertake a monthly benchmarking survey that allows participating attractions to measure their performance in the context of the island-wide picture rather than from within their own business.

Taking an outward rather than inward-looking approach, participating attractions also benefit from a monthly brief analysis of wider trends within the visitor attractions sector based on data and research relating to the UK.

Our adjusted approach is helping to give us an effective picture of the tourism economy in Jersey, but there is still much to do.

During 2017 we will look to work with partner organisations to help develop tools that can measure sentiment among businesses operating within Jersey’s tourism and hospitality sectors.

We’re generating clearer insights into the true volume and value of tourism, as well as starting to build a picture of what visitors do while they’re here and how they feel about their experience.





Tourist Information Centre

Working together to create a new Tourist Information Centre for Jersey.

Tourist Information Centres are an important part of the visitor experience; places where visitors can get insights into the destination, both through the storytelling experience, displays, information and interaction with staff. Critical to the success of a Tourist Information Centre is to make sure that accurate and timely information is easily available to visitors, where and when they need it.

From March 2016, Visit Jersey, Jersey Heritage and the Ports of Jersey agreed to join forces in an innovative two-year partnership to provide a first class visitor experience, delivering high quality year-round information to our visitors.

Jersey Heritage agreed to locate the Tourist Information Centre in the Jersey Museum in return for delivering the retail operation, while Ports of Jersey continued to provide front of house services. This new partnership allows Jersey Heritage to reopen Jersey Museum year-round, benefiting visitors and residents.

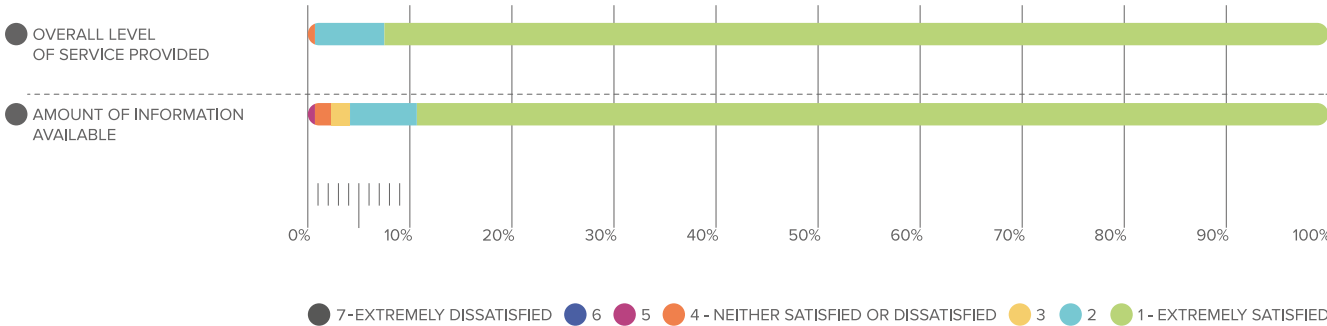
Jersey’s Tourist Information Centre provides both digital and physical communications, and creates a go-to hub of information for visitors. It’s important that access to Jersey and its products is simple, that visitors find it easy to get around, and there are opportunities for visitor spend. In the ten months ending December 2016, an estimated 94,309 visits were made to the Tourist Information Centre (this includes both visitors and locals).

This new partnership provides a platform to drive and devise an innovative and engaging Tourist Information Centre for Jersey now, and into the future, creating a professional and modern space for visitors to access local area knowledge.

In 2016, we conducted consumer research across key European markets to help identify where our ‘best prospects’ are. We also undertook research with our existing Tourist Information Centre users to establish what information visitors are looking for and identify areas to improve, with findings such as a desire to see more and better ‘You are Here’ signage within the Parish of St. Helier.

Jersey’s Tourist Information Centre provides both digital and physical communications, and creates a go-to hub of information for visitors.

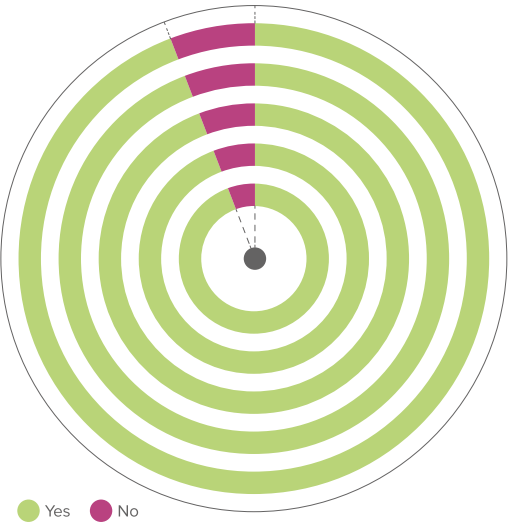
Satisfaction with the Tourist Information Centre



Figures

	AMOUNT OF INFORMATION AVAILABLE	OVERALL LEVEL OF SERVICE PROVIDED
7 Extremely dissatisfied	0%	0%
6	0%	0%
5	1%	0%
4 Neither satisfied or dissatisfied	2%	1%
3	2%	0%
2	7%	7%
Extremely satisfied	89%	93%

Were information needs met by the Tourist Information Centre?



Supporting Our Industry

Formulating partnerships to generate growth

As an industry, we collectively need to package up the island break experience to inspire even more visitors to discover Jersey and deliver a better return on investment. In 2016, Visit Jersey launched a Trade Partnership Programme to collaborate with travel industry suppliers to enhance marketing activities, drive business profits and growth in tourism.

The Trade Partnership Programme introduced a range of graded marketing opportunities to work collaboratively with suppliers on-island to distribute brand Jersey and drive partner bookings. Different accommodation providers, attractions and activity providers find different packages appropriate for their business needs.

A total of 14 partners came on board with the programme in 2016. Five partners signed up as gold partners and nine partners at silver level. 95,891 referrals were delivered to partners on the programme.



Trade

Independent analysis by Ecorys (a research company) has estimated that our trade-facing activities aimed at supporting both on-island suppliers and off-island buyers helped to generate at least £5.1m of incremental visitor spending in Jersey. During 2016:

- We arranged Destination Jersey, Visit Jersey's premier buyer-seller workshop over two days in April 2016, when 62 buyers (Austria, China, Denmark, France, Germany, Netherlands, Switzerland, UK) met with 116 representatives from Jersey tourism suppliers and businesses. Over 1,000 appointments (15 minutes each) were completed representing 250 hours of selling Jersey.
- Visit Jersey and Visit Guernsey exhibited with commercial suppliers at ITB Berlin (the world's largest travel trade show) and World Travel Market (WTM) in London.
- We supported travel agent roadshows throughout the year. For example, as a member of Bright, we met agents in Chester, Manchester, Exeter and Bournemouth.
- We sent out an invitation to tender for our trade development work in the UK and Europe (excluding Germany). Hills Balfour were successful and assumed the duties from February 2017.
- A tiered Gold, Silver and Bronze accommodation supplier programme was introduced to better communicate opportunities and align marketing efforts and spend to common objectives.

Off-Island Travel Trade

Jersey relies on many partners to distribute Jersey holidays; some based in Jersey but many of them are located off-island in places where our potential visitors live. These travel companies provide a route to market and we have worked hard to support long-established firms as well as open new sources of business for travel to Jersey. The following section - Stimulating consumer demand- highlights a number of these relationships and how we cooperated last year. Visit Jersey was a member of, and actively involved with the following trade associations; UKInbound, ETOA, ABTA, and ANTOR.

Product

Visit Jersey is keen to promote excellence in all areas of the visitor experience here in Jersey. We do not control any of these visitor experiences but we are committed to working with others to help create this sense of place we call Jersey. Our work in this area was focused on supporting stakeholders, industry groups and individual businesses. We strove to 1) help increase productivity of existing tourism businesses such as championing a year-round visitor economy, 2) support workforce skills development and 3) provide actionable insights to our industry and government. This is how we helped our product in 2016:

- We developed an 'always-on' trade digital platform, the MyListing portal. All accommodation providers, attractions, event organisers, restaurants, bars, retailers, tour guides and operators can create a profile on jersey.com free of charge, that is then served up to visitors on the consumer website. More than 140 accommodation suppliers, 120 eateries, 150 offers, 130 see and do (attractions/activities/retail) and 300 events have been added, and this remains an ongoing process.
- As an organisation, Visit Jersey contributed evidence to the Hospitality Skills Review.
- We developed a monthly survey for the Jersey Attractions Group (JAG) to help them better record and report on performance of this sector.
- At the end of 2016 we tendered for the What's On Guide & Official Map. In spring 2017 the new publications will be distributed air and sea-side at our ports and throughout the island.
- To raise the awareness of Jersey as a heritage destination and drive business into the early part of the year, we delivered a Channel Islands Heritage Festival in partnership with Visit Guernsey and suppliers, with over 300 events in Jersey over 42 days.
- We organised the two-week Autumn Walking Festival with 25 guides and 105 guided walks across the island. An estimated 250 walkers took part.

Supporting Our Industry

Product (cont.)

- Offered recommendations to Economic Development, Tourism, Sport and Culture (EDTSC) for the updating of the Tourism Law and General Provisions Order.
- As part of the Jersey National Park working party, we supported the creation of the Jersey National Park which launched in spring 2016 after 50 years in the making.
- Partnered with Zebra Cycle Hire and the Department for Infrastructure for an independent review, and upgrading of the Cycle Network signage of all ten cycle routes across the island. Liaised with tourism organisations in the South Coast of England, Brittany and Normandy to promote the Tour de Manche Leisure Cycle route.
- Engaged with the new Shadow Jersey Sport board and EDTSC to create a mechanism to understand the nature and volume of sports tourism associated with local clubs to inform a growth plan for

2017 and beyond.

- Advised clubs applying for Tourism Development Fund (TDF) grants to bring new sporting events to the island, including the European Squash Team Championships in April 2017, expected to attract around 130 people.
- Partnered with Skills Jersey organisations and the Jersey Hospitality Association (JHA) in creating a long-term plan to staff the tourism and hospitality sectors. Highlands hospitality students were offered opportunities to work with organisers of the Acorn European Seniors Open Golf tournament to gain an insight into event organisation and evaluation of a European event.
- Supported establishments for licences for migrant workers.



Industry advice and support

- Partnered with Jersey Business and the JHA in staging a series of Digital Upskilling Workshops for tourism suppliers, commencing in Enterprise Week in May in partnership with Tamba Park, followed by an autumn series of four different sessions in partnership with the Digital Hub.
- Supported new supplier initiatives with insights and contacts including Jersey Heritage Tours, Jersey War Tours and Jersey Uncovered.
- Supported applicants for new, or changes to existing developments for tourism, accommodation and attractions with insights and through the planning process.
- Collated a programme of festivals and events for promotion by our trade partners, and supported organisers with insights and information to help their events. For example, in September the coastline of the Jersey National Park witnessed 36 competitors running and swimming around 51 km of cliff paths and bays in the new Breca Jersey Swimrun. The success of the trial event has resulted in the organisers rebooking for 2017, with projected growth.

Driving quality and customer service

- To promote good customer service, we teamed up with Travel Solutions for the Customer Services Awards in the Tourism Category.
- To continue to drive up standards, we partnered with Quality in Tourism for the delivery of the accommodation grading system.

Modernising tourist information

- We created downloadable guides for 60 self-guided walks, eight advanced cycle routes, five heritage trails and a cycling guide.

The business tourism market

- In 2016 we partnered with the Radisson Blu to promote Jersey as a destination for meetings, incentives, conference and events (MICE) at two business network events (BNC) in London and delivered a familiarisation trip for buyers.
- We updated the Jersey Conference Bureau site as a temporary stop gap until the development of a new business site is completed.

France

Our French visitor was typically younger than that from the UK. Therefore, social media and PR played important roles. We grew our Facebook followers to 17,161 by year-end. Our key travel company partner in France was Condor Ferries and we worked on a series of marketing initiatives especially designed to drive business and increase passenger numbers to Jersey at different times of the year. The winter campaign leveraged TripAdvisor's Travellers' Choice Award as the 'Best Island in the British Isles' but with messaging focusing on the French love for things 'typically British'. We partnered with the Best Western Royal Hotel and Condor Ferries.

Germany

Summer charter routes were supported through co-operative co-funded marketing activity. We partnered with the following German travel companies; Dertour, TUI Wolters, Air Berlin, Germanwings/Eurowings, and Globalis. Jersey welcomed 6% more German visitors last year. We also invested in German consumer print and social media. Our UK social media activity was re-purposed and localised. We saw a 62% increase in Facebook friends by the year-end totalling 2,490.

Stimulating Consumer Demand

2016 Marketing Strategy

Throughout 2016 our priority was to create meaningful and emotional long-term connections with potential visitors. The marketing strategy was informed and underpinned by robust research, we told the 'Jersey Story' through emotive content, innovative campaigns and visitor advocacy.

<div>1</div> <p>Create, reposition and unify a new 'Brand Jersey', convincing new and reassuring existing visitors to seek out Jersey through an emotive proposition.</p>	<div>2</div> <p>Bring 'Brand Jersey' to life, by telling our island story and connecting it to the visitor experience.</p>
<div>3</div> <p>Capture, create and nurture visitor intimacy - activating and engaging visitors through 'earned' and 'owned' media channels.</p>	<div>4</div> <p>Partner with the industry and drive marketing alignment, engaging with trade to distribute a new 'Brand Jersey'.</p>





**Telling the ‘Jersey Story’
through emotive content,
innovative campaigns and
visitor advocacy creates
meaningful long-term
connections with
potential visitors.**



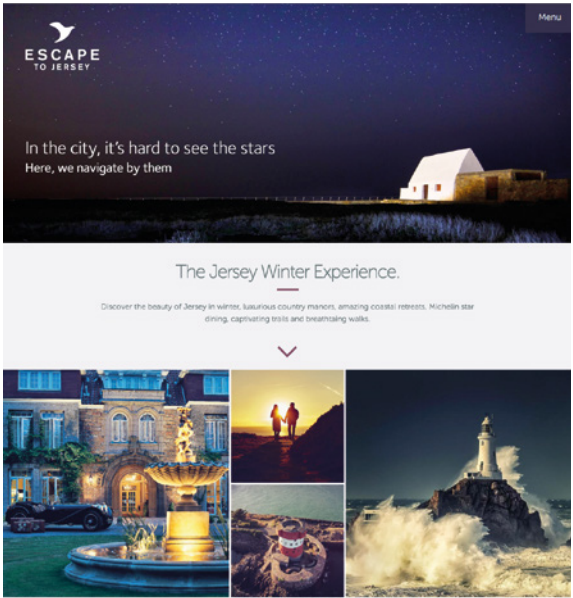
Campaigns | United Kingdom

Winter Campaign 2015/2016

Escape to Jersey extended our 2015 summer campaign into the winter months, focusing on the year-round benefits of an island visit. A social shareable microsite introduced visitors to local legends, insider secrets and immersed viewers in Jersey’s winter experience including dramatic scenery, local winter produce, warming cuisine, relaxing spas and a rich heritage. An advertising campaign ran using social media, display advertising and PR.

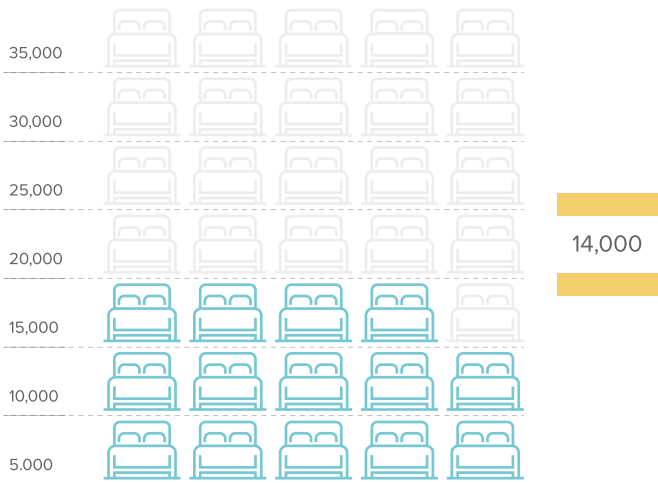
Outputs

Incremental website sessions:	165,972
Data captured:	16,845
Incremental partner referrals:	6,800

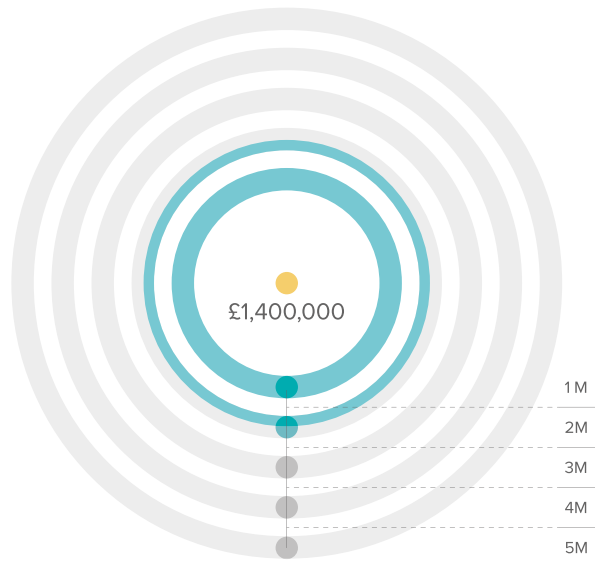


Winter Campaign 2015/2016 – Evaluation

Bednights



Visitor Spend



During 2016 the number of visitor nights in Jersey that can be attributed to the Winter Campaign is estimated at more than 14,000, with this being equivalent to visitor spending of almost £1.4m.

Among those who had interacted with the Winter microsite 82% recalled having done so more than one month later. The majority felt that the campaign conveyed Jersey as offering a warm welcome and as being the sort of place that would be enjoyed. Very nearly two-in-three talked to their friends and relatives about Jersey after seeing the campaign.

Campaigns | United Kingdom

Summer Campaign Phase 1

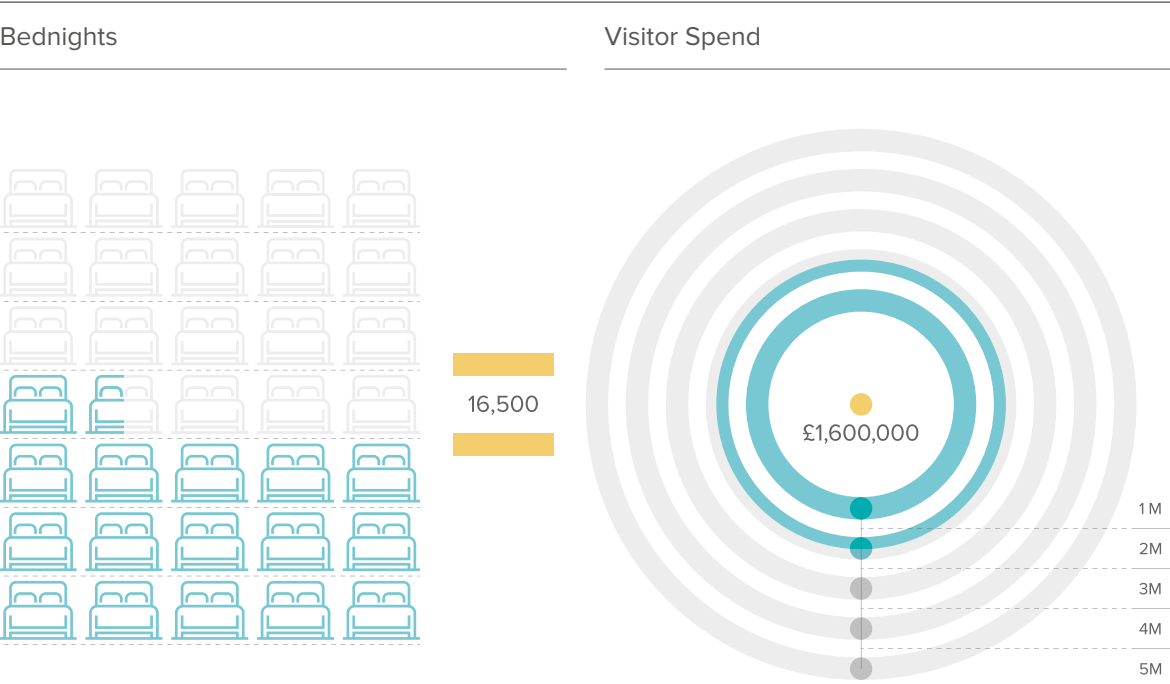
The first phase of our summer campaign used the TripAdvisor Travellers’ Choice award for ‘Best island in the British Isles’ as an opportunity to celebrate Jersey’s holiday credentials, and prompt new and existing visitors to book their 2016 summer holiday. The national print and digital campaign drove visitors to a microsite that reinforced the endorsements and channeled users towards Jersey’s hotels, attractions and exclusive holiday offers.



Outputs

Incremental website sessions: **76,080**
Data captured: **17,480**
Incremental partner referrals: **7,510**

Summer Campaign Phase 1 – Campaign Evaluation



During 2016 the number of visitor nights in Jersey that can be attributed to the Summer Campaign is estimated at 16,500, with this being equivalent to more than £1.6m of visitor spending.

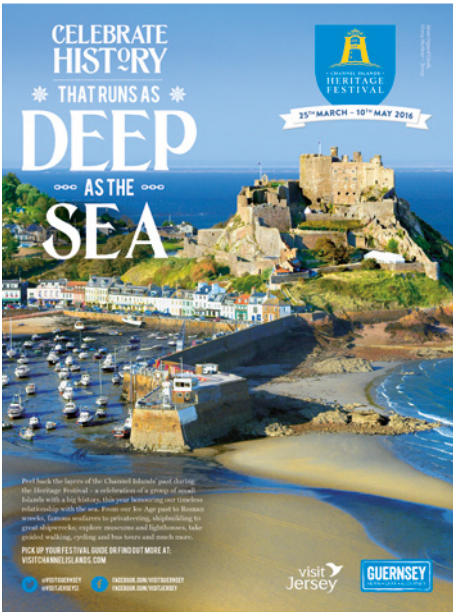
The campaign was recalled by more than four-in-five of those who had visited the

microsite more than a month after having done so, with the majority saying that the advertising had made them feel that Jersey was the sort of place that they would enjoy. Around one-in-three talked to their friends and relatives about Jersey after having seen the campaign.

Campaigns | United Kingdom

Channel Islands Heritage Festival 2016

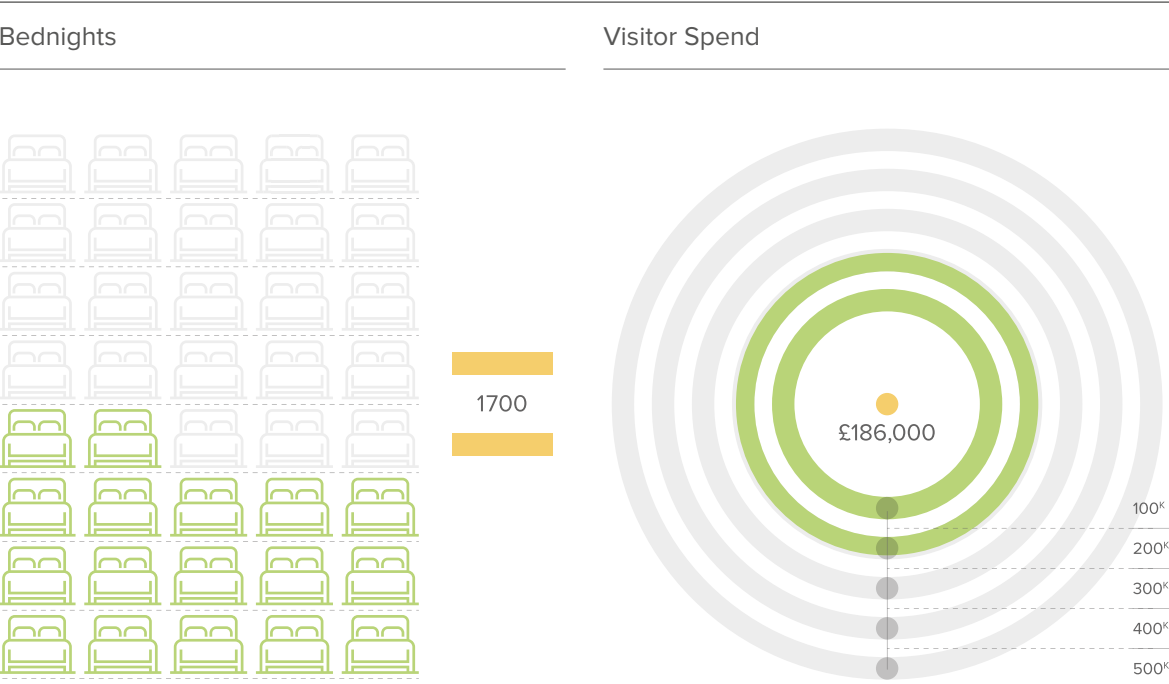
The 2016 Channel Islands Heritage Festival celebrated the islands’ relationship with the coast and the sea, and ran between 25th March and 10th May 2016. In collaboration with Visit Guernsey, www.visitchannelislands.com was launched to promote the festival. More than 630 events, activities and tours took place across all islands over the course of 47 days.



Outputs

Incremental website sessions: **68,874**
Data captured: **11,639**
Incremental partner referrals: **6,965**

Channel Islands Heritage Festival – Campaign Evaluation



During 2016 the number of visitor nights in Jersey that can be attributed to the Channel Islands Heritage Festival Campaign is estimated at around 1,700, with this being equivalent to visitor spending of £186,000. The campaign appealed particularly to the more mature visitor who had visited the Channel Islands a number

of times in the past. A key learning was that there is an opportunity to convey more of a festival atmosphere when such events take place. Encouragingly those interacting with the campaign are highly likely to recommend the Channel Islands as a visitor destination.

Campaigns | United Kingdom

Summer Campaign Phase 2

To complement our new destination brand, the campaign introduced Jersey as 'The Island Break', with a range of targeted content inviting visitors to free their spirit, come up for air and discover a collection of 360° virtual reality (VR) experiences.

We produced nine 360° videos of iconic island locations and distributed them through targeted online advertising across display, social and video on demand (VOD) channels.

We reinforced this with the distribution of 600 plastic VR viewers to key influencers and 5,000 branded Google Cardboard VR headsets to selected online signups. To end the campaign we also delivered an experiential event; a live stream of a Jersey sunset into a London pub, with reactions captured and turned into a video edit, which was then seeded through social and pushed further through advertising and social sharing.

Outputs

Incremental website sessions: 139,090
Data captured: 16,821
Incremental partner referrals: 27,537

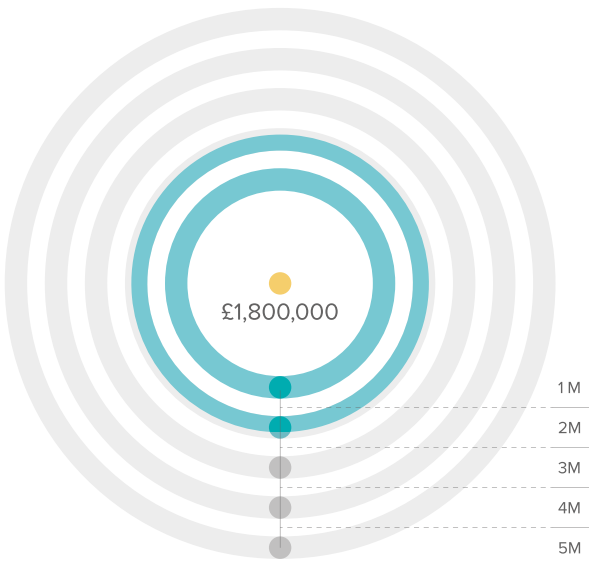


Summer Campaign - Evaluation

Bednights



Visitor Spend



During 2016 the number of visitor nights in Jersey that can be attributed to the Summer 360 Campaign undertaken in the UK is estimated at more than 17,000, with this being equivalent to visitor spending of £1.8m.

More than three-in-four of those who had interacted with the Summer 360 microsite

recalled having done so more than a month later and overwhelmingly felt that it made Jersey look like the sort of place that they would enjoy. Two-in-five talked to their friends and relatives about Jersey after the visiting the microsite while one-in-four were inspired to sign-up to receive Visit Jersey's e-newsletters.

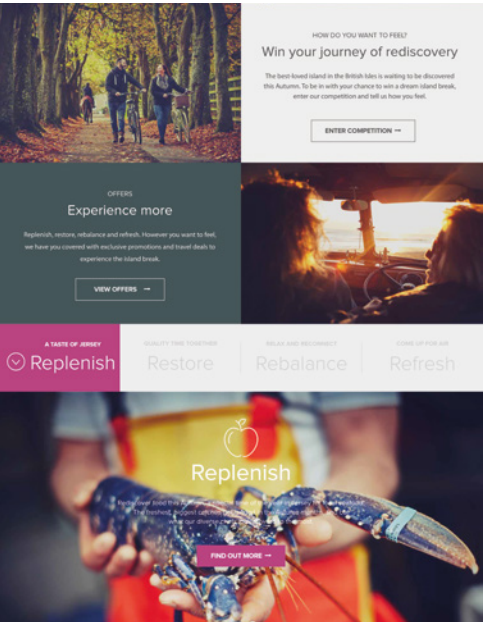
Campaigns | United Kingdom

Autumn Campaign

Visit Jersey's autumn campaign focused on the themes of replenish, restore, rebalance and refresh for a UK and French audience. Users were offered a selection of itineraries based around how they wanted to feel, and served up local experiences tailored to their chosen theme. The campaign launched in mid-September and ran until the end of November, with web and video content, display banners, automated email activity, social and blog presence, print and a Secret Escapes microsite.

Outputs

Incremental website sessions: 78,080
Data captured: 23,325
Incremental partner referrals: 9,898

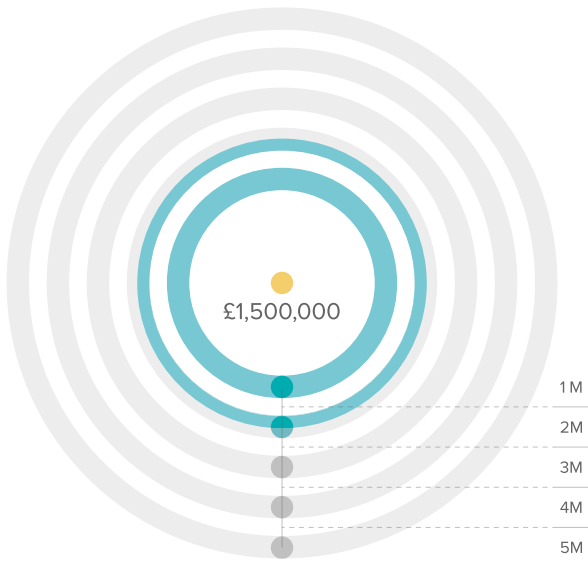


2016 Autumn Campaign - Evaluation

Bednights



Visitor Spend



During 2016 the number of visitor nights in Jersey that can be attributed to the Autumn Campaign undertaken in the UK is estimated at just more than 16,000, with this being equivalent to visitor spending of £1.5m.

More than a month after visiting the Autumn Experience microsite four-in-five respondents

still remembered having done so, and the majority felt that it had conveyed the sense of Jersey offering a warm welcome and that it was the sort of place they would enjoy. More than half went on to talk to their friends and relatives about Jersey while 18% followed partner links to special offers featured on the microsite.

Campaigns | France

Winter Campaign 2015/2016

Focused on Tripadvisor users voting Jersey as the best British island in 2015. A social shareable microsite introduced visitors to local legends, insider secrets and immersed viewers in Jersey’s winter experience including dramatic scenery, local winter produce, warming cuisine, relaxing spas and a rich heritage. An advertising campaign ran using social media and display advertising, and PR.

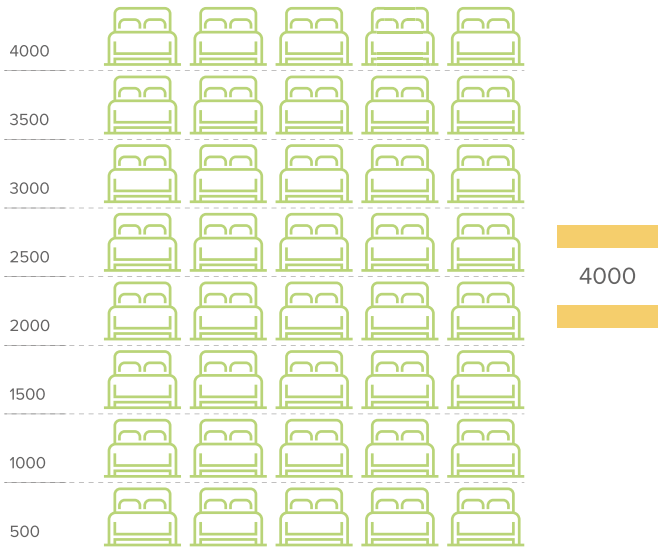


Outputs

Incremental website sessions:	48,989
Data captured:	26,340
Incremental partner referrals:	7,821

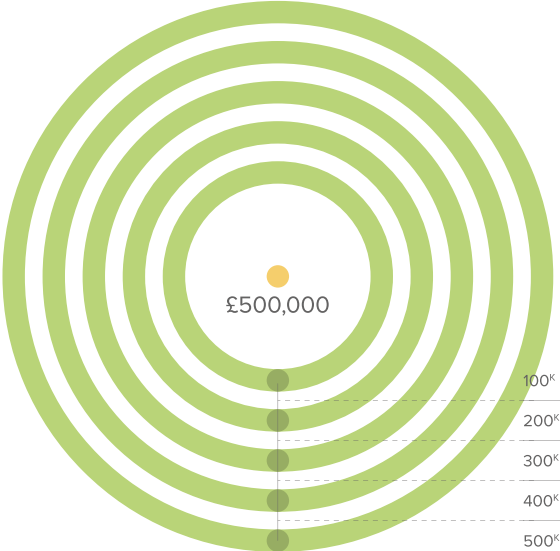
Winter Campaign - Evaluation

Bednights



During 2016 the number of visitor nights in Jersey that can be attributed to the Tripadvisor campaign in France is estimated at almost 4,000, with this being equivalent more than £500,000.

Visitor Spend



The campaign was highly memorable with 86% recalling having visited the microsite more than a month after having done so and it was successful in conveying the idea that Jersey is the sort of place that would be enjoyed. Almost six-in-ten talked to their friends and relatives in France about Jersey after having seen the campaign.

Campaigns | France

Summer Campaign

This campaign introduced Jersey as 'Le Break Insulaire', with a range of targeted content inviting visitors to free their spirit, come up for air and discover a collection of 360° virtual reality (VR) experiences. We produced nine 360° videos of iconic island locations and distributed them through targeted online advertising and social media.

Outputs

Incremental website sessions:	16,425
Data captured:	36,742
Incremental partner referrals:	2,655



Campaigns | France

Autumn Campaign

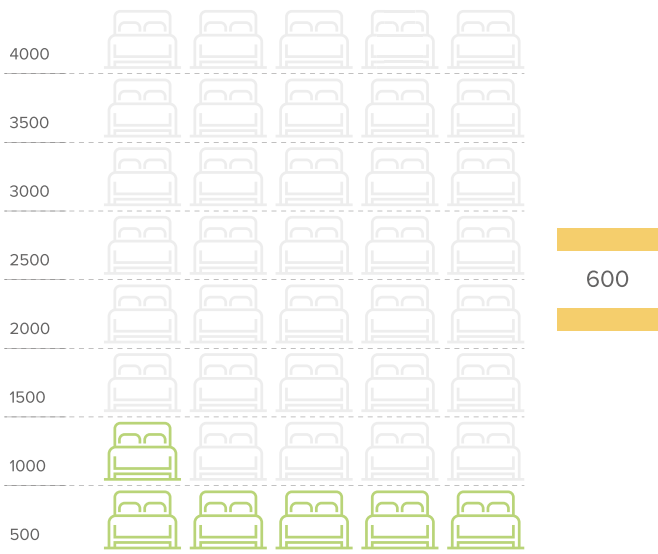
Our French autumn campaign translated the island's natural recalibrating effects into a series of itineraries and local experiences tailored to each person. The four different themes delivered a range of short break ideas from calming and rebalancing getaways through to local food experiences and travel with friends. The campaign included a dedicated microsite, web and video content, display banners, automated email activity, and an opportunity to win a break to Jersey.

Outputs

- Incremental website sessions: 4,954
- Data captured: 2,007
- Incremental partner referrals: 1,302

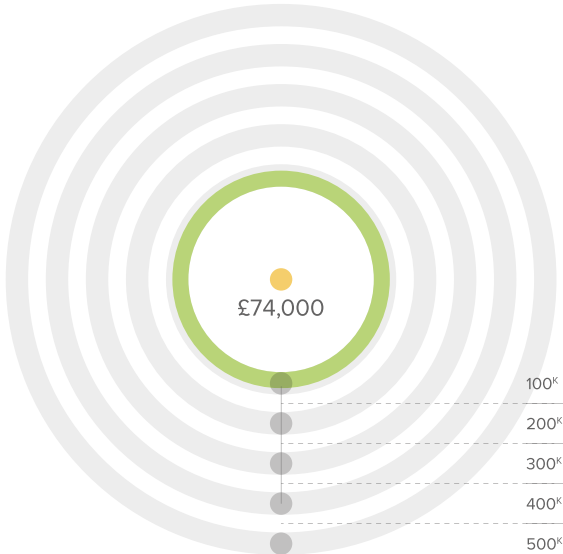
Autumn Campaign - Evaluation

Bednights



During 2016 the number of visitor nights in Jersey that can be attributed to the France Autumn campaign is estimated at almost more than 600, with this being equivalent to almost £74,000 of visitor spending.

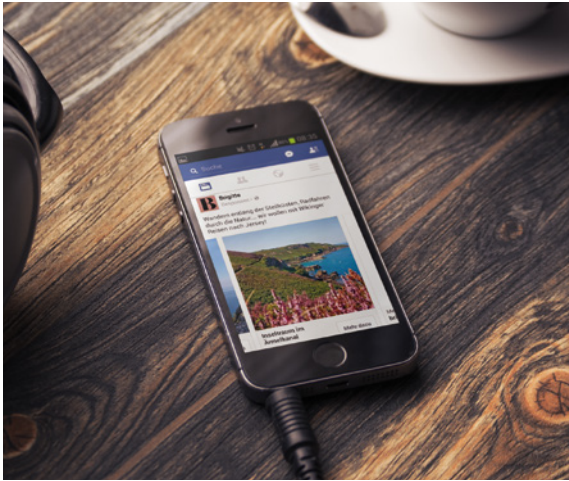
Visitor Spend



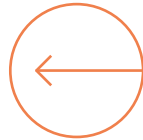
The campaign was recalled by more than three-quarters of those who had visited the microsite more than a month after having done so, and encouraged more than half who had seen it to talk to their friends and relatives about Jersey. The majority of those exposed to the campaign said that it made them feel that Jersey is the sort of place that they would enjoy.

Campaigns | Germany

To build awareness of Jersey as a visitor destination in Germany, Visit Jersey focused on a longer-term strategy of investing in and leveraging tour operator partnership channels and programmes. Our activity included driving data collection and leveraging networks and brand awareness of German tour operators and airlines.



For more information on German trade partnerships, please go to the Supporting our Industry section on page 31.



2016 marked a unique moment and opportunity for Jersey.

With a new team, engaged and enthusiastic stakeholders, there was a real sense of optimism for the future.



Visit Jersey Marketing Channels

jersey.com

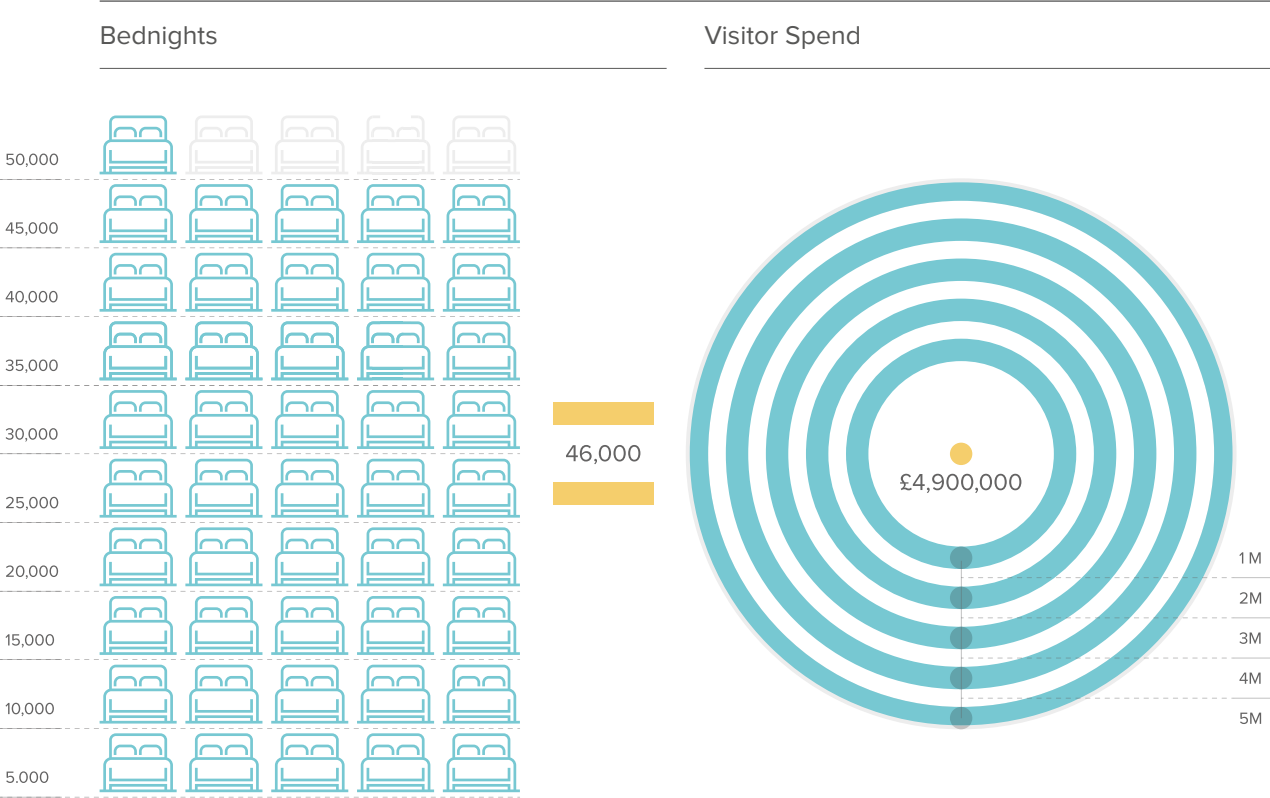
The launch of the new jersey.com website in June 2016 allowed us to begin to evolve a new platform tailored to the needs of both visitors and industry stakeholders. From an old site of almost 8,000 pages, the new website offered a modern visitor-focused user experience. The new website was designed to inspire new visitors to choose Jersey through storytelling and stunning visual content, provide resources to plan their trip and provide partners with referral opportunities.



Website Visits 2016

Total visits:
2,280,579
United Kingdom:
1,328,472
France:
196,310
Germany:
87,230
Guernsey:
17,756
Europe:
47,747
On-island:
354,840
Other:
248,224
Total Partner Referrals:
229,331

Evaluation of jersey.com



During 2016 the number of visitor nights in Jersey that can be attributed to the content on jersey.com is estimated at almost 46,000, with this being equivalent to visitor spending of more than £4.9m.

Although around one-third of those who use jersey.com do so just the once, the typical user visits the site three times providing ample opportunity for Visit Jersey to establish a rapport with the user and encourage sign-up to other channels. A tablet is the device used most often to access the site, and in terms of location most use it while at home.

The site is very powerful at conveying a feeling that Jersey is the sort of place that the viewer would enjoy and in communicating all that there is to see and do in Jersey. After visiting the site nearly 60% talked to their friends and relatives about Jersey while 49% searched for accommodation options.

Visit Jersey Marketing Channels

Social Channels

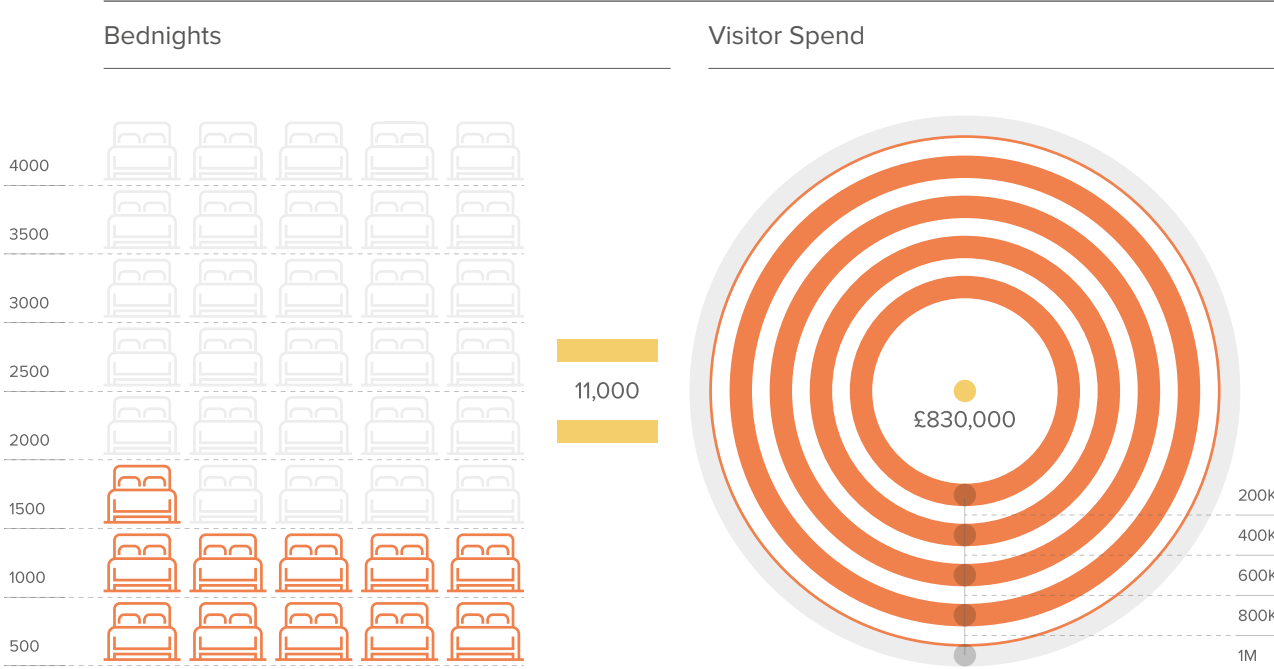
Our aim of inspiring new visitors and reminding those who've visited before of Jersey's special appeal is particularly visible across our social channels (Twitter, Facebook and Instagram). Eye-catching imagery, engaging copy and links to features matched to seasonal search terms are planned and scheduled to ensure we create content that responds to what our audiences are searching for.



Social Audience

Facebook United Kingdom:		
2015	2016	
50,904	60,995	
+		19%
Facebook France:		
2015	2016	
16,692	17,161	
+		3%
Facebook Germany:		
2015	2016	
1,560	2,490	
+		60%
Twitter United Kingdom:		
2015	2016	
50,904	60,995	
+		8%
Instagram:		
2015	2016	
2,221	6,400	
+		188%

Evaluation of Social Media Channels

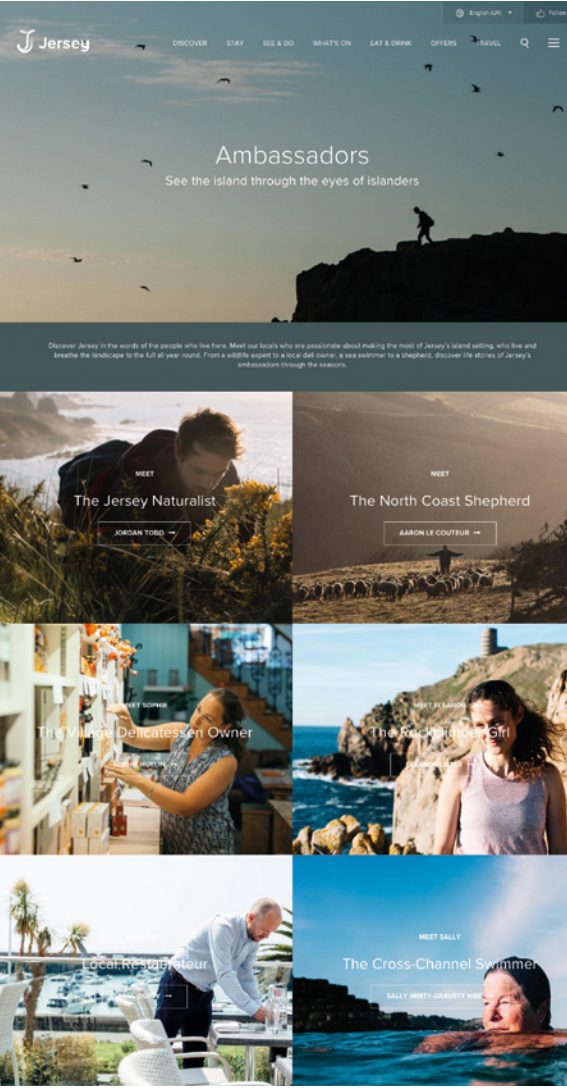


During 2016 the number of visitor nights in Jersey that can be attributed to the content within Visit Jersey's English-language social media channels is estimated at more than 11,000, with this being equivalent to visitor spending of almost than £830,000.

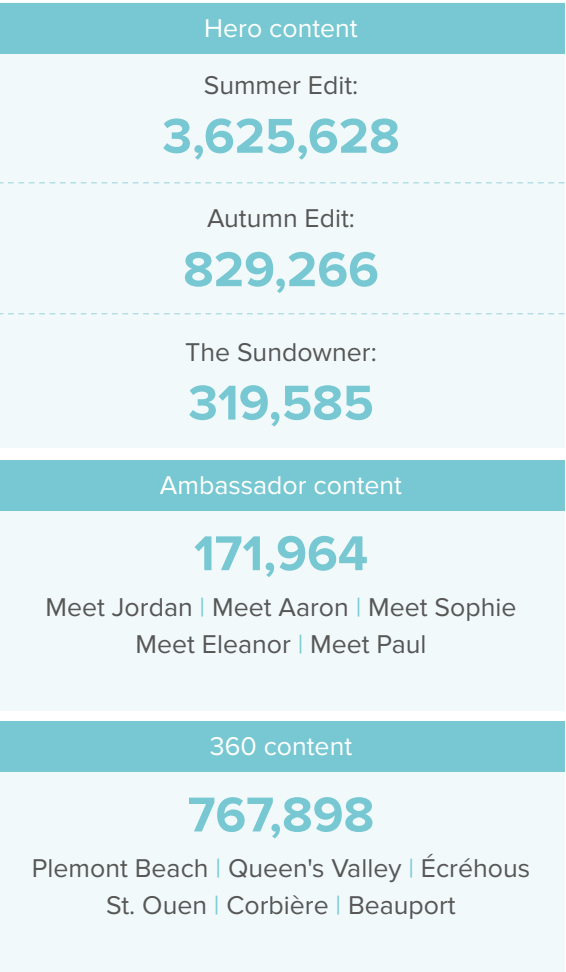
On average those who follow Visit Jersey on social media follow 1.35 of our channels, with seven-in-ten taking a look at Visit Jersey content within their social feed at least once a week. More than half of respondents said that after seeing Visit Jersey social media content they searched for either transport options to Jersey or accommodation in Jersey. The content was widely considered to be both 'Appealing' and 'Informative'.

Content

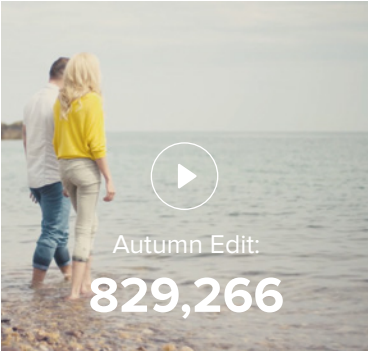
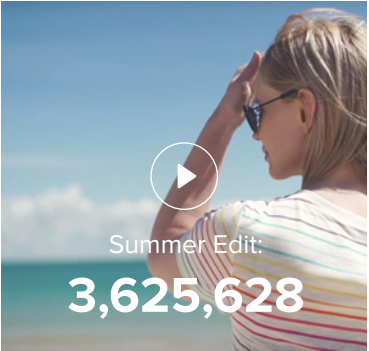
Our aim is to create authentic, inspiring content that would stand out on an international stage and amplify an emotional connection to Jersey. Island-wide locations, a diverse range of local ‘models’ and considered content capture through all the seasons ensured we framed a true representation of Jersey and kept a consistent, authentic tone of voice from film and photography through to copywritten feature content.



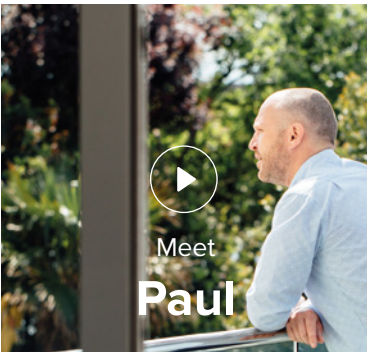
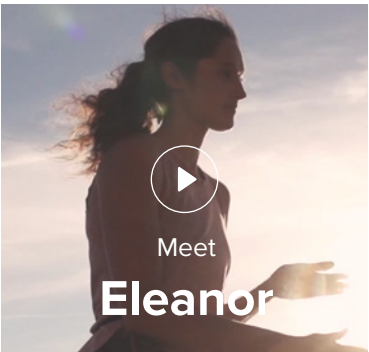
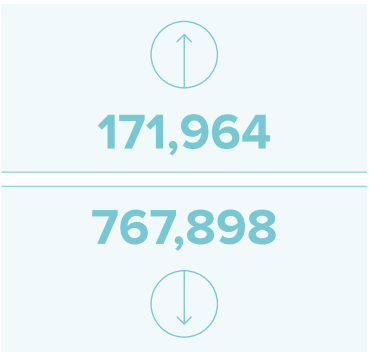
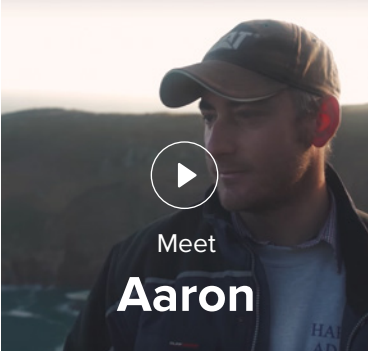
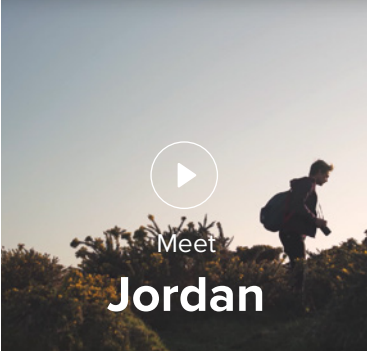
Total views across campaign platforms and social channels



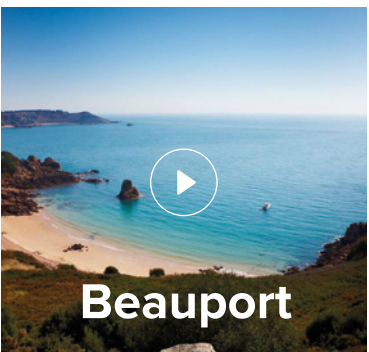
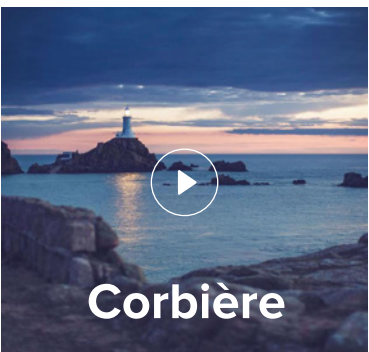
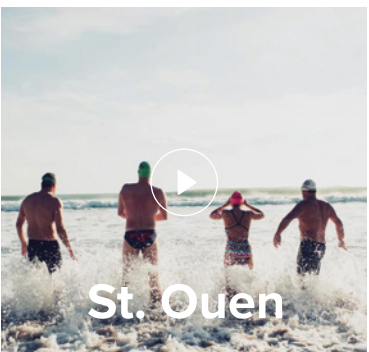
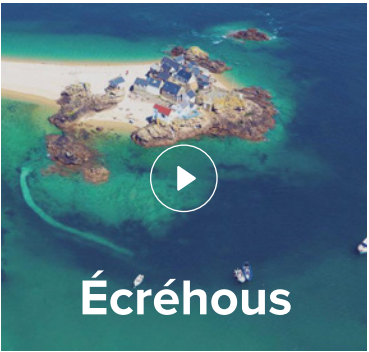
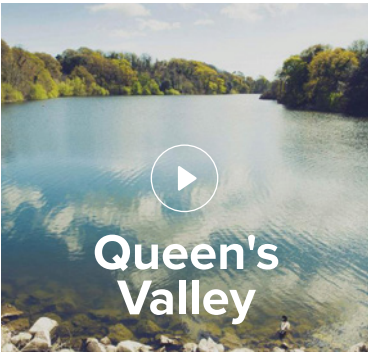
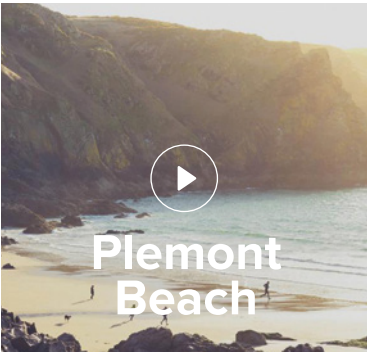
Hero content



Ambassador content



360 content



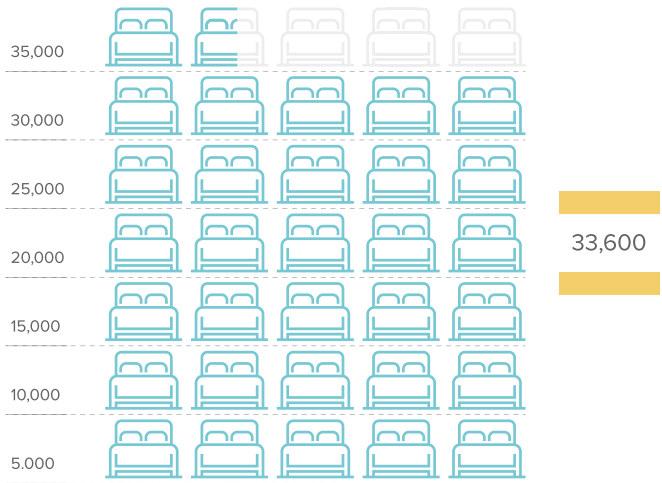
Email Marketing

In 2016, our objective was to create and nurture visitor intimacy across our email marketing channels through the continuous production and curation of powerful, engaging and relevant content. Through research and data analysis we were able to understand visitor behaviour at each stage of the travel lifecycle, we aligned our digital content and email marketing to inspire potential and past visitors to engage and share their Jersey experience.

Audience size:	200,000
Open rate	20% - 30%

Evaluation of Email Marketing

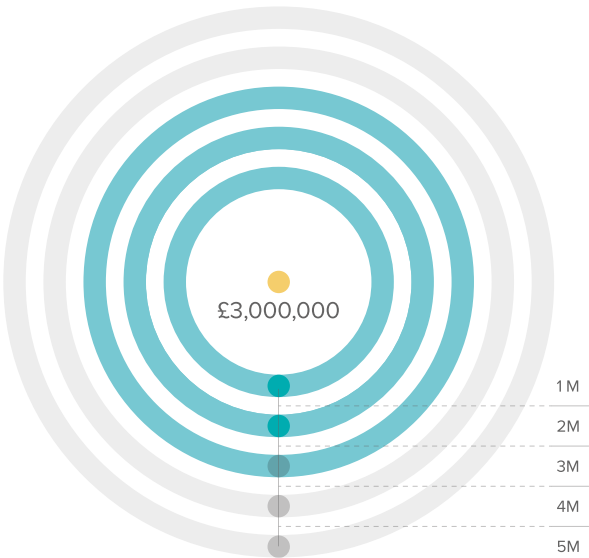
Bednights



During 2016 the number of visitor nights in Jersey that can be attributed to the content within e-newsletters sent to those in the UK is estimated at more than 33,600, with this being equivalent to visitor spending of more than £3m.

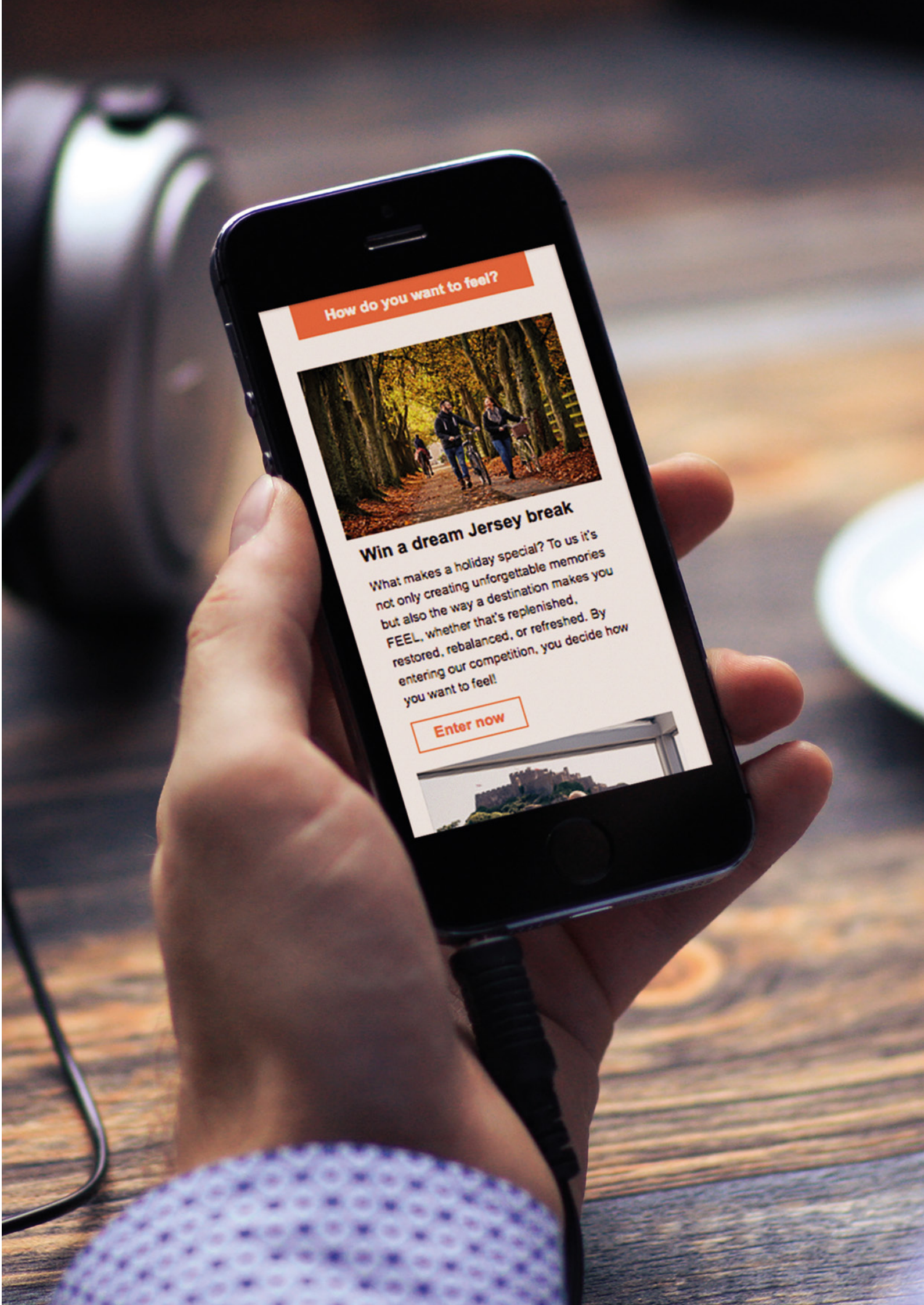
Subscribers to Visit Jersey’s e-newsletter typically read around half of the newsletters that they receive. The newsletters are highly successful at making the reader feel that Jersey is the sort of place that they would enjoy and at providing a sense of what there is to see and do in Jersey. Many readers talk to their friends and

Visitor Spend



relatives about the material they have seen in the newsletter and around two-in-five search for travel or accommodation options.

The material in the newsletters is considered to be both ‘informative’ and ‘appealing’ with the majority being keen on the idea of the newsletter containing plenty of special travel or accommodation offers.



PR Activity

We focused on bringing to life the experience of discovering Jersey through the eyes of ‘people like me’. Mapping our key audiences against media titles enabled us to prioritise media coverage, ensuring all PR activity matched marketing objectives and audience behaviour.

Throughout 2016, our PR strategy was to shift attitudes and perceptions about Jersey to a place our target markets would consider visiting.

Number of Press Visits
United Kingdom: 19
France: 10
Germany: 8

Total number of articles
808

Featured an attribute
89%

Opportunities to see
866,000,000

Featured a consideration call to action
65%

Featured a message
73%

Featured an impact message
74%



**We focused on
bringing to life
the experience
of discovering
Jersey through
the eyes of
'people like me'.**



UK Digital Partnerships

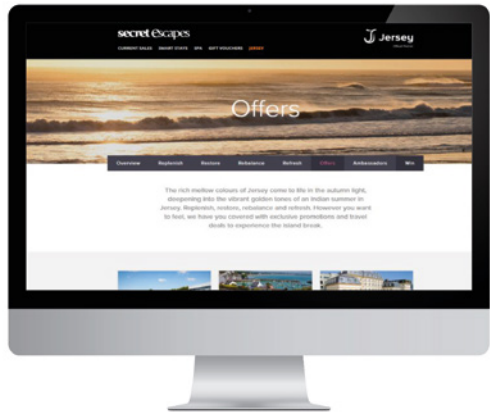
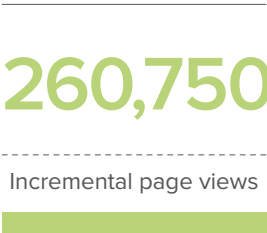
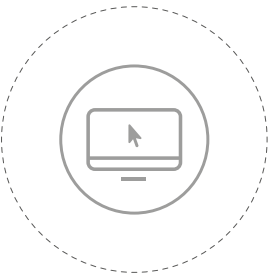
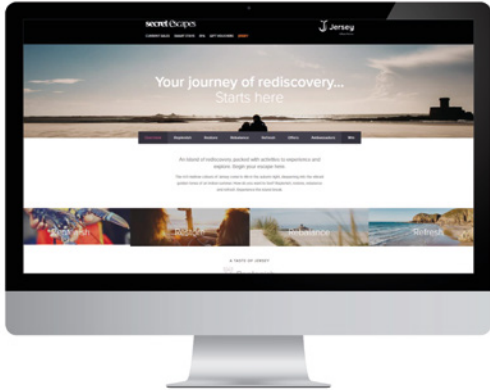
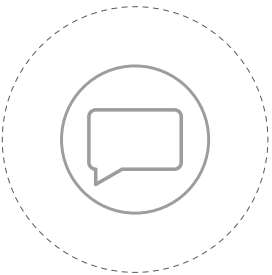
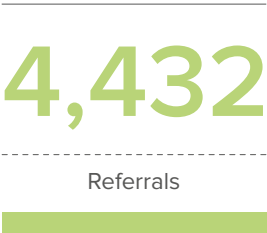
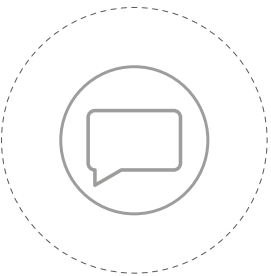
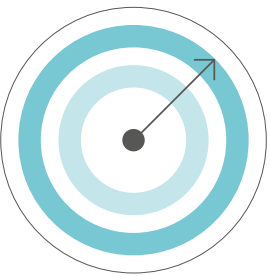
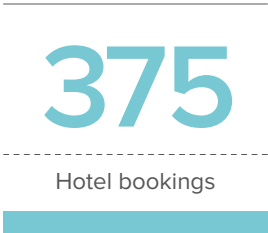
Through careful relationship nurturing, we were able to leverage our marketing by strategic partnerships that gave the Visit Jersey brand more reach and depth.

Secret Escapes

We partnered with Secret Escapes and clothing brand Barbour to launch a ‘Win a Dream Jersey Break’ competition. Using an autumn-themed homepage takeover with our imagery and content, display advertising, email, social media activity and a competition landing page on secretescapes.com. The campaign generated 15,803 competition entrants, over 500 partner referrals, and 375 hotel bookings, achieving a 50% year on year uplift for Jersey bookings.

TripAdvisor

The launch of Visit Jersey’s Premium Destination Page in partnership with TripAdvisor enabled us to track customer behaviour when using TripAdvisor and gave us insights into the consumer decision-making process. The page drove consumer engagement and content distribution as well as consumer activation through to business listings, with 4,432 referrals and 260,750 incremental page views.



Our Evaluation Methodology

During 2016 we introduced a process to track the effectiveness of our marketing investment. We spend (input) to fund an activity (output), track consumer initial responses (outtakes) and reactions (intermediate outcomes) and then measure the outcome.

Here's how it works.



We will be working hard with industry partners to tell our island story and ignite interest in visiting Jersey throughout the year.



Our People | Our Board



Kevin Keen
Chairman



Doug Bannister



Keith Beecham



Tim Crowley



Mike Graham



Catherine Leech



David Seymour



Sam Watts

Our Team



Keith Beecham
Chief Executive Officer,
Visit Jersey



Rachel Winchurch
Executive Assistant to CEO



Adam Caerlewy-Smith
Head of Marketing



Meryl Le Feuvre
Trade Account
Marketing Manager



Rhys Powell
Market Development



Sarah Richardson
Digital Marketing Executive



Rebecca A'Court
PR & Marketing Executive



Jo Wills
Campaign Executive



Karen Evans
Product Executive



James Walker
Culture, Active and
Sport Executive



Jennifer Ellenger
Head of Product
Development



David Edwards
Head of Research
and Insights



Oliver Archbold
Head of Corporate
Services



Suzanne Kirk
Events Jersey Business
Development Manager

Our Values

Last year, we spent time thinking about who we are and the kind of organisation we want to be. Here's the result.

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.

Credibility

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

Passion

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


Resilient

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



Financial Report

	1 January 2016 to 31 December 2016		26 September 2014 to 31 December 2015	
	£	£	£	£
OTHER INCOME				
Grant from States of Jersey	5,100,000		2,578,982	
Other net income	114,091		203,257	
		5,214,091		2,782,239
OPERATING EXPENSES				
Marketing Costs	3,667,799		1,618,379	
Staff Costs	911,254		599,075	
Other Operating Costs	603,001		385,355	
		5,182,054		2,602,809
SURPLUS FOR THE YEAR/PERIOD		£32,037		£179,430



**Visit Jersey's job in 2017
is to tell our island's story
and help even more people
rediscover the beautiful
destination we call home.**

Visitor Economy Profile

Jersey's Visitor Economy

Tourism is a vital part of Jersey's economy and is very much wider than just hotels and visitor attractions. Recent analysis indicates that tourism accounts for 8.3% of Jersey's economy. This is built up from the obvious benefits (that is to say visitors settling their hotel bill), plus the benefits that come from support services used by the tourism sector (such as plumbers and electricians employed by hotels), plus the benefits that come thanks to those who are employed directly within the sector spending their hard-earned wages in the local economy.

Around 7,000 jobs are supported by tourism, that's around one in eight jobs in Jersey. These jobs are across many skill levels and ages.

Economic data does not always convey the true worth of something. Tourism activity within Jersey has other intangible benefits that enhance the quality of life for residents. Some examples of these benefits include helping to support our flights and ferry connectivity, the protection of our island's heritage, and safeguarding more places to eat and drink than there would be without our visitors.

Analysis has shown that output per employee in Jersey's hotels and restaurants is on a par with that found in London. However, there is scope to improve productivity in Jersey. Marketing is part of the solution to bolstering the sector's productivity. For example, productivity can be enhanced by attracting visitors outside of the peak summer season. But marketing is only part of the solution. Multilateral action is called for. Tourism businesses can continue to invest in their product, their processes and crucially the skills of their staff.

Government can ensure that policies act to foster entrepreneurialism and that businesses can access suitably skilled labour. And the island's transport links need to evolve so that the carriers can make commercial returns whilst offering consumers services that are competitive in both price and reliability.



We changed the method for capturing information about the volume and value of tourism to Jersey during 2016. The following provides the best estimates once data from these two approaches is combined. From 2017 we will be able to provide a much richer analysis based on the new Exit Survey approach.

	2016	Annual Change
Total Visits to Jersey in 2016	692,000	- 4%
Staying leisure visits	356,000	3%
of which:		
UK	269,000	7%
France	34,000	- 6%
Germany	15,000	6%
Other Channel Islands	17,000	- 22%
Staying business visits	63,000	- 14%
Visits to Friends & Relatives	100,000	- 6%
Leisure day trips	105,000	- 3%
Non-leisure day trips	40,000	- 21%
Total Visitor spend (£m)	£ 228.3	- 6%
Average spend per visit	£330	- 2%

Visitor Economy Profile

January to June Visitors 2016

The following estimates are based on the previous method of relying on Visitor Registration Cards for those visitors who stayed in registered accommodation, and estimates for other types of visitors based on an earlier Exit Survey conducted in 2012, rolled forward using the best available data.

On-Island Visitor Expenditure	£101 million
Total Tourism Visitor Volume	315,900
Total bed nights sold	704,300
Total room nights sold	387,000
Staying Leisure Visitor Volume	153,350
Staying Leisure Visitor Average Stay	3.75
Staying Leisure Visitor On-Island Expenditure	£68.5 million
Staying Business Visitor Volume	33,800
Staying Business Visitor Average Stay	2.34
Staying Business Visitor On-Island Expenditure	£13.2 million
Staying Conference Visitor Volume	1,130
Staying Conference Visitor Average Stay	2.51
Staying Conference Visitor On-Island Expenditure	£0.5 million
Day Trip Visitor Volume	74,200
Day Trip Visitor On-Island Expenditure	£4.6 million
Registered accommodation establishments	133
Registered tourism bed spaces	10,750
Total bed nights available over first 6 months	1,430,450
Average bed space occupancy over first 6 months	49%
Average room space occupancy over first 6 months	62%

July to December Exit Survey Analysis

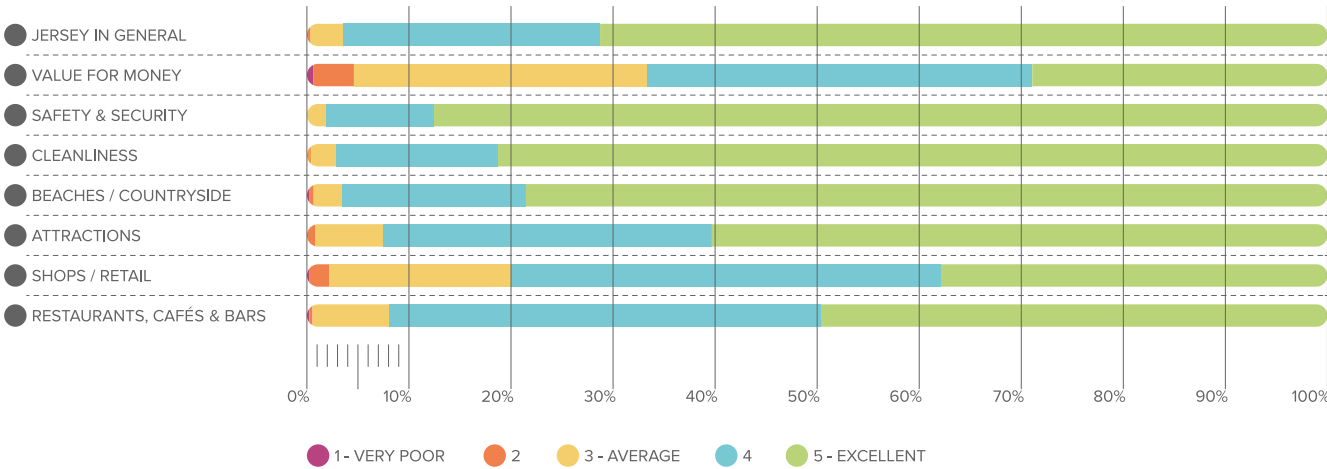
During the second half of 2016 departing visitors gave Jersey a Net Promoter Score of 67, indicating very high levels of advocacy.

Visitors are also asked how they rate different aspects of their experience, and the following chart reveals that Jersey is rated as ‘Excellent’ for its ‘Safety and Security’ by 88%, with 81%

rating Jersey ‘Excellent’ for ‘Cleanliness’, 79% for its ‘Beaches and Countryside’ and 71% for ‘Jersey in general’.

38% rated Jersey ‘Excellent’ for its ‘Shops / Retail’ and 29% for its ‘Value for money’.

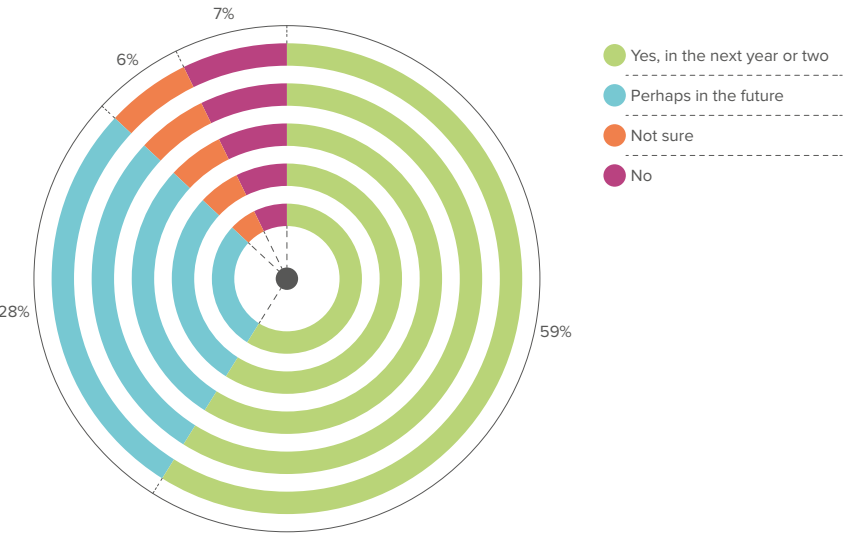
Ratings



When asked about how likely they are to return to Jersey, 59% said that they were likely to return to Jersey in the next year or two, with a further 28% saying ‘Perhaps in the future’.

Only 7% of departing visitors said that they would not be likely to return to Jersey.

Likelihood of returning to Jersey



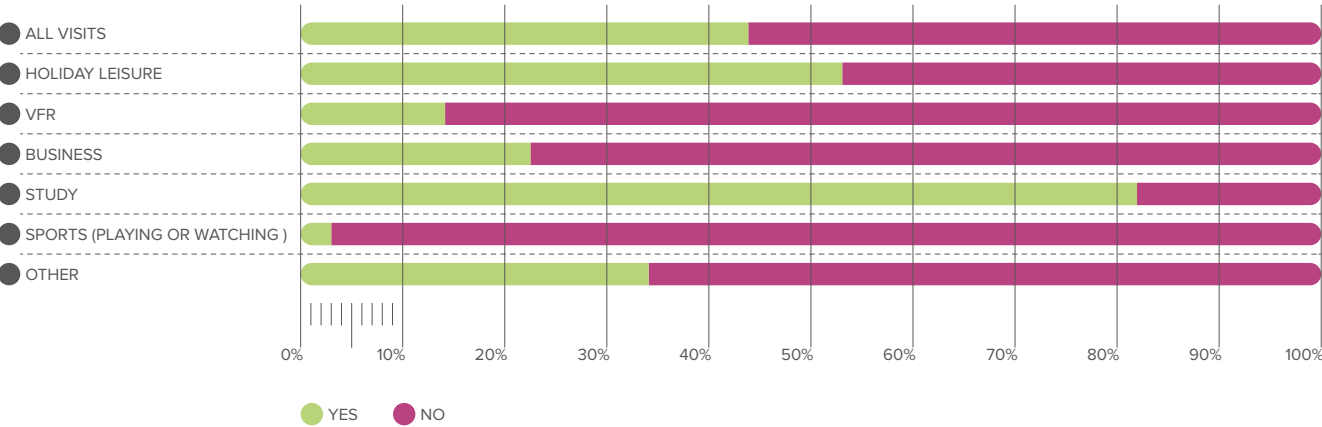
Visitor Economy Profile

July to December Exit Survey Analysis

Across all journey purpose categories, 44% of departing visitors said that they were making their first visit to Jersey, with this proportion varying from 82% of those in Jersey for Study to just 3% whose trip purpose was to watch or play sport.

A little over half, 53%, of those visiting for Holiday / Leisure said that this was their first visit to Jersey.

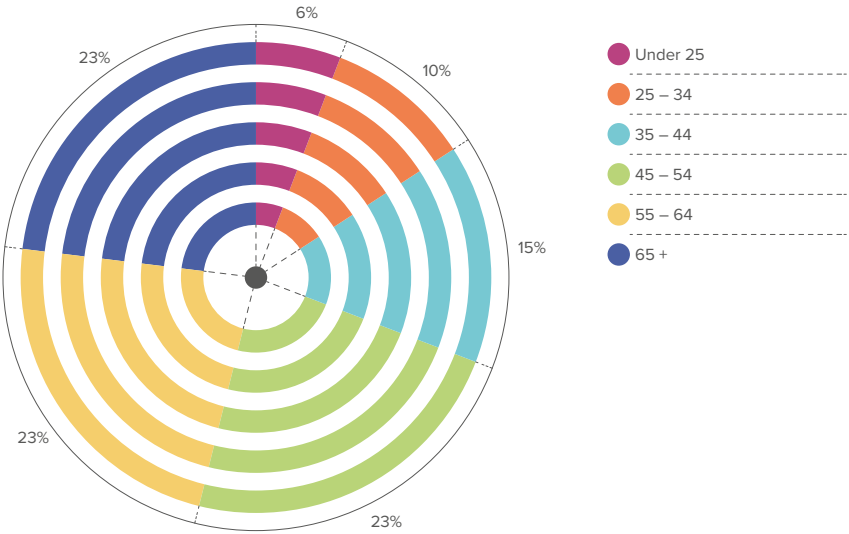
Whether making first visit to Jersey



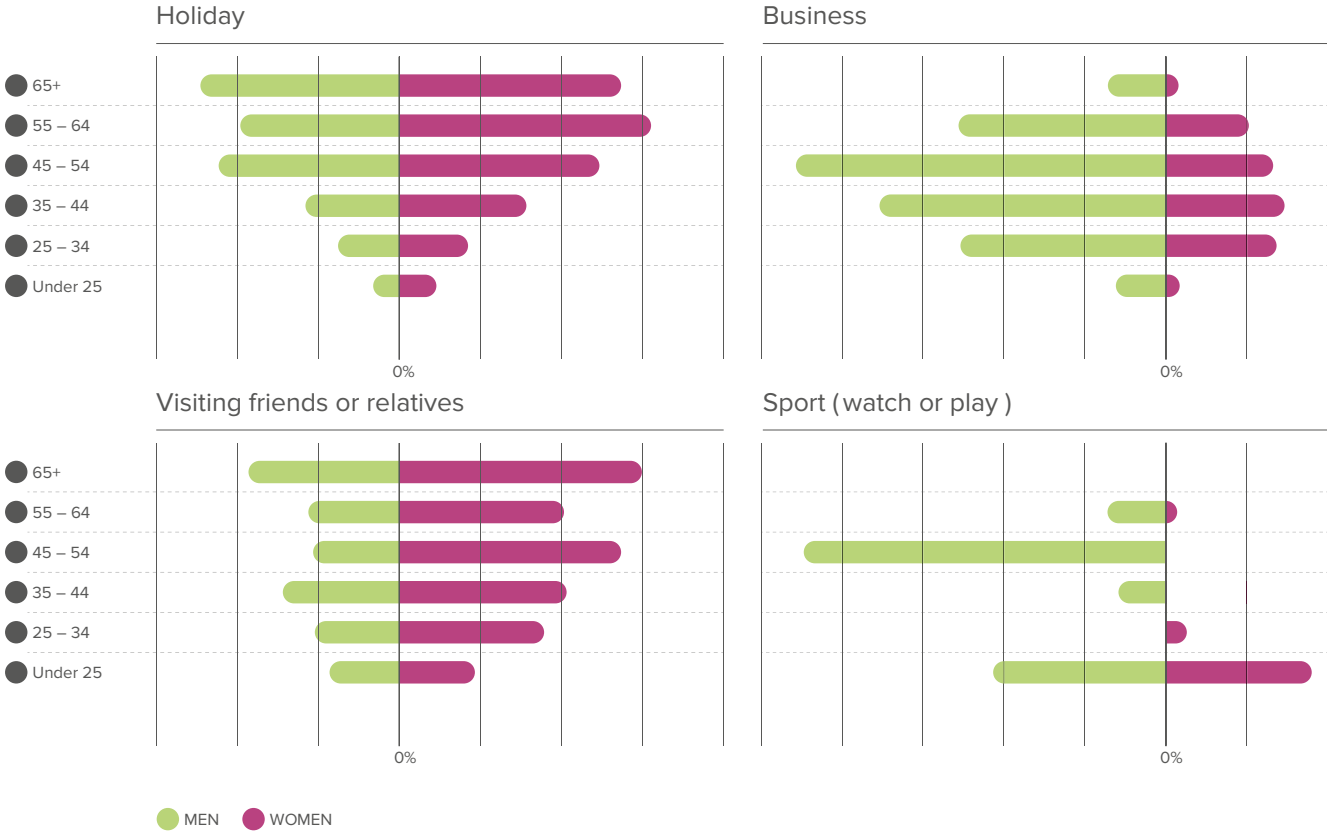
Almost half of all visitors to Jersey are aged 55 or older. The following charts indicate the

variations that exist in terms of age and gender across different trip purpose categories.

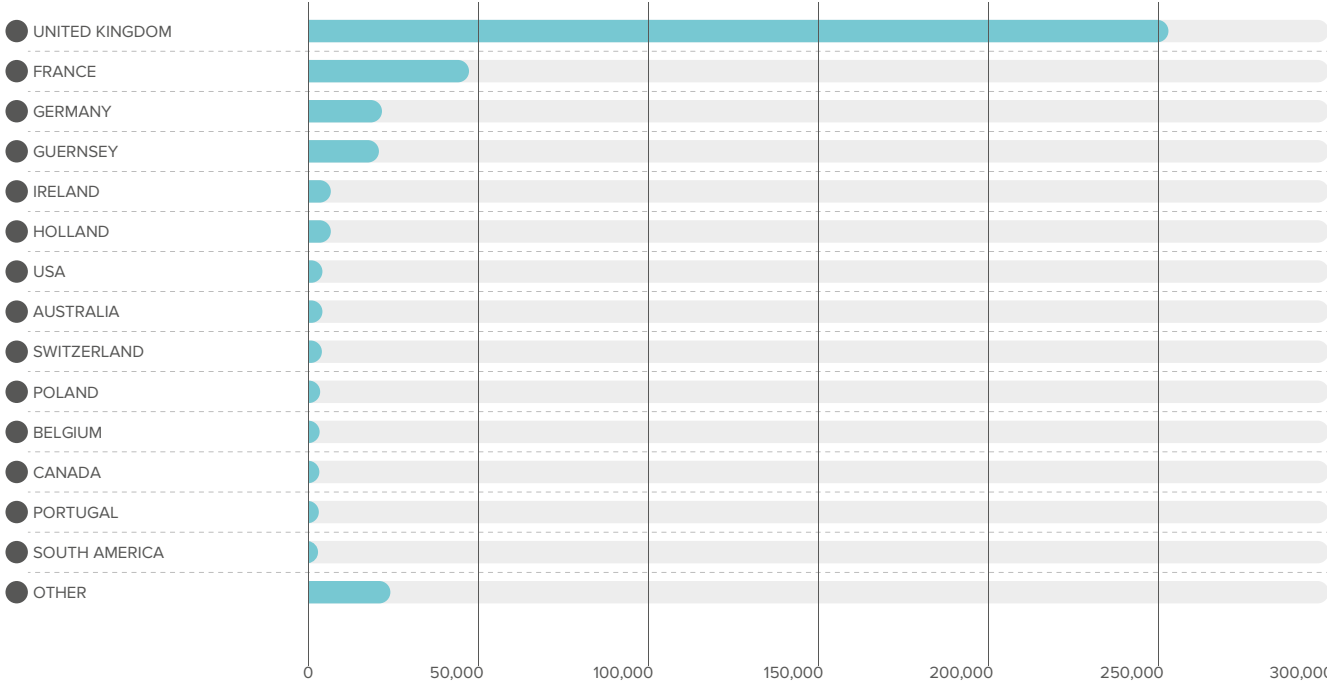
Visitor age



Age and gender profile by journey purpose



Total visits by country of residence

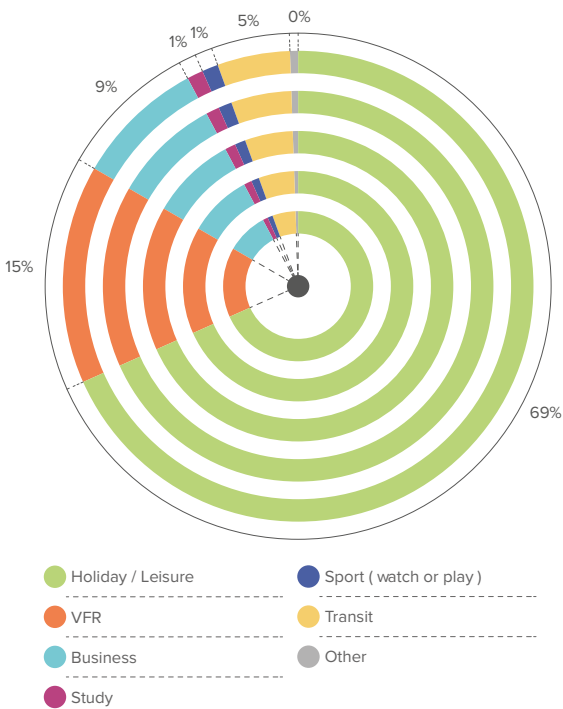


Visitor Economy Profile

July to December Exit Survey Analysis

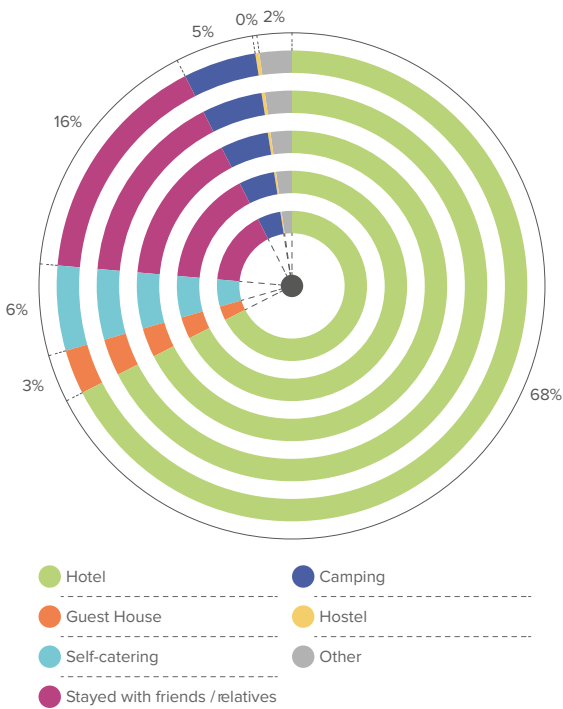
The majority of visits during the final six months of the year, 69%, were for Holiday / Leisure, while 15% were to visit friends or relatives.

Journey purpose mix of visits



Most visitors to Jersey reported having stayed in a hotel, but one-in-six stayed with friends or relatives.

Accommodation mix



During the second half of 2016, 70% of visits were by those who left the island by air, 30% by sea. The average length of stay for those arriving by air was 5.7 nights, much higher than the 2.7 nights average for those leaving by ferry. This means that when looking at visitor nights

spent in Jersey, air accounts for 83% and sea 17%. The average trip length varies both by mode and by market. Visits by sea tend to last longer than those by air from Guernsey and the UK, but visits by air from Ireland, France and Germany last considerably longer than those by sea.

Average length of stay (nights) by mode and country of residence



Accommodation Sector Performance

A growing number of hotels in Jersey are participating in the STR Benchmarking Survey that enables them to better understand their performance and productivity against a competitor set.

At the aggregate level for Jersey (based on participating hotels) 2016 was a year of good growth:

- Revenue per Available Room increased by 10% during 2016, brought about by a 6% increase in Average Daily Rates and a near three percentage point increase in room occupancy.

- In comparison with other areas of the British mainland such as the South West of England and Cumbria, Jersey sees lower levels of room occupancy, but a higher comparative Average Daily Rate resulting in Revenue per Available Room being somewhat higher in Jersey than in these areas.

- Revenue per Available Room in Jersey during 2016 was very close to that achieved across the UK as a whole, but the UK saw occupancy rates that were somewhat higher and Average Daily Room Rates that were somewhat lower.

Performance of Jersey Hotels in 2016 (Source: STR)

Average Room Occupancy	66.6%
Average Daily Room Rate	£106
Revenue per Available Room	£71

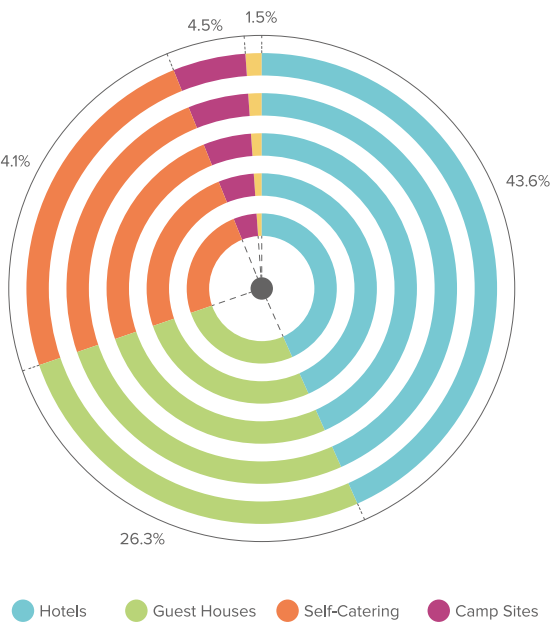
Amount of registered visitor accomodation in Jersey

	PREMISES	TOTAL BED SPACES	TOTAL BEDROOMS	SELF-CATERING BEDSPACES	SELF-CATERING UNITS	CAMPSITE BEDSPACES	TOTAL PERSONS ACCOMMODATED
Hotels	58	7,575	3,719	62	19	-	7,637
Guest Houses	35	798	399	33	8	-	831
Self Catering	32	-	-	1,193	338	-	1,193
Camp Sites	6	-	-	-	-	747	747
Youth Hostel	2	146	33	-	-	40	186
Totals	133	8,519	4,151	1,288	365	787	10,594

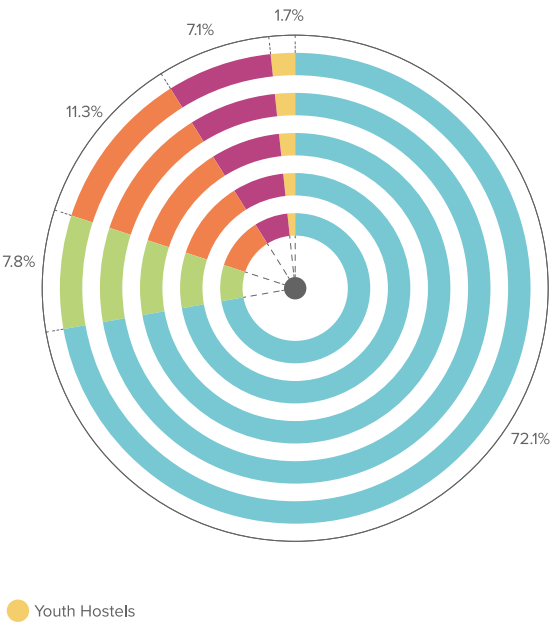
Visitor Economy Profile

Accommodation Overview

Premises by category

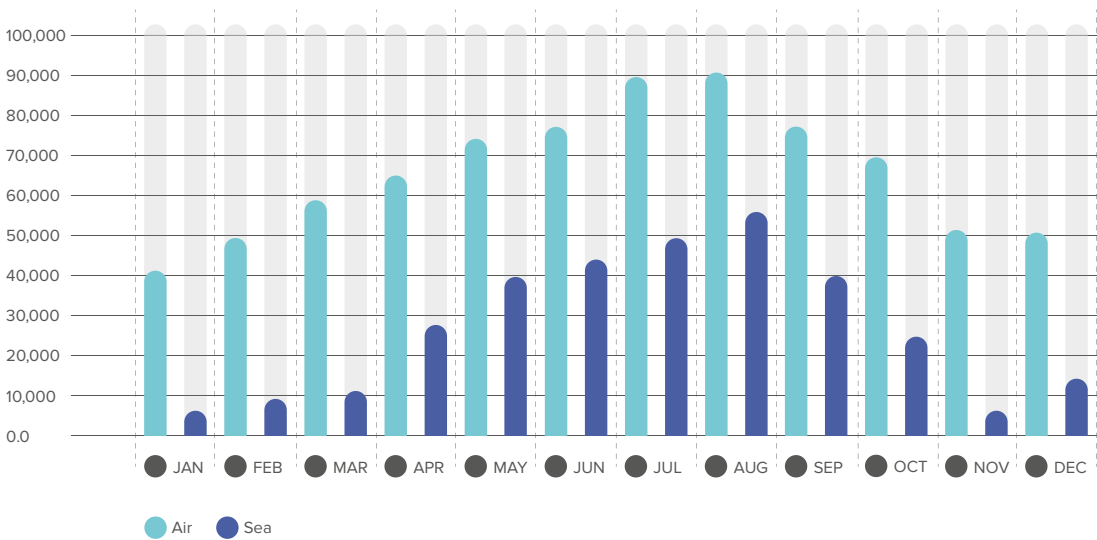


Persons accommodated by category

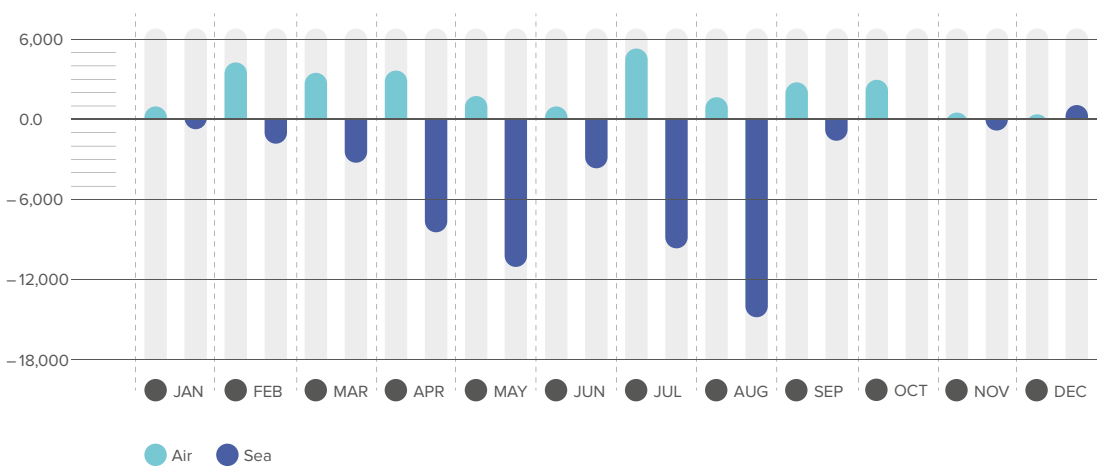


Arrivals Overview

Passenger Arrivals (arriving visitors and returning residents)

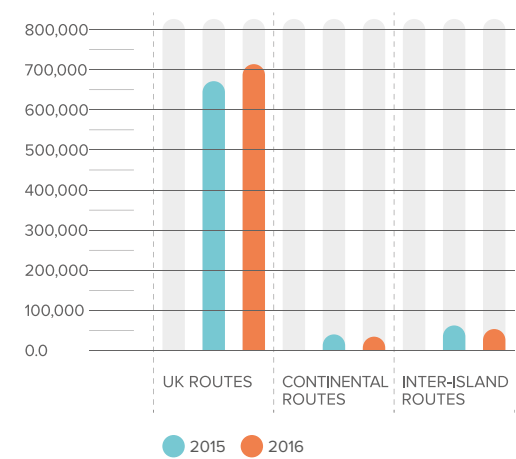


Annual change in passenger arrivals (arriving visitors and returning residents)

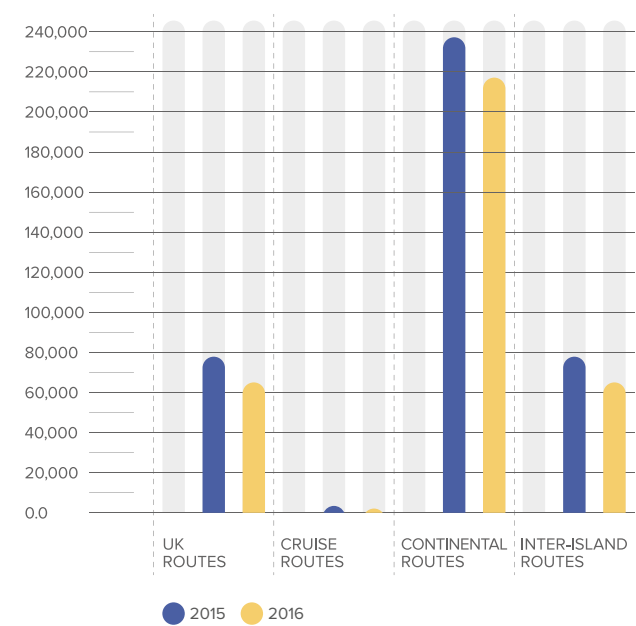


Visitor Economy Profile

Air passenger arrivals (arriving visitors and returning residents)



Sea passenger arrivals (arriving visitors and returning residents)



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