



# Visit Jersey 2021 Business Briefing

8<sup>th</sup> December 2020

Amanda Burns | CEO



# Approach: focus on key drivers of growth



We will:

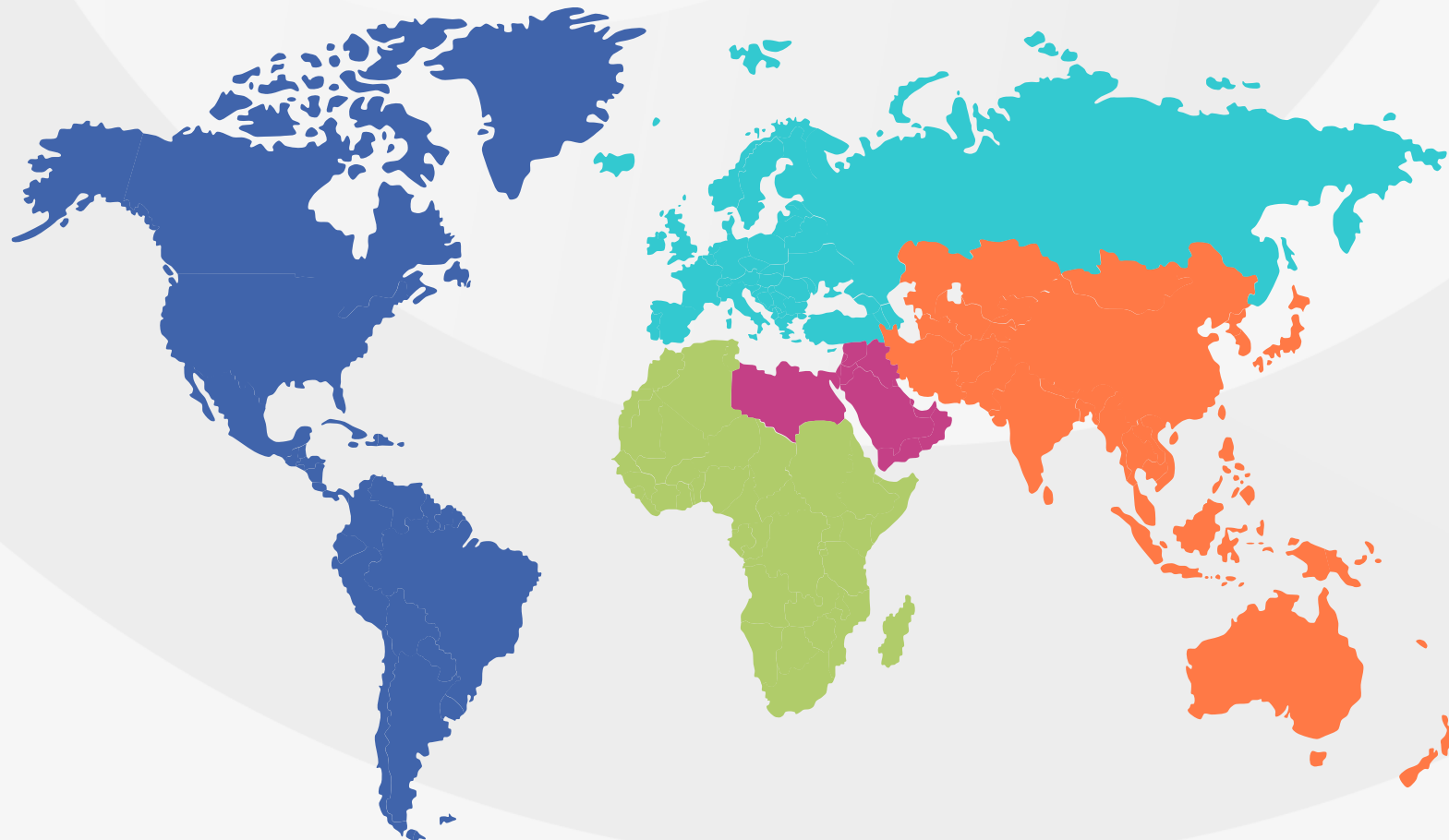
- **Prepare** for a range of scenarios.
- **Think** long-term and short-term.
- **Anticipate, understand and respond** to the critical shifts – adapt and be agile.
- **Determine** shorter planning cycles.
- **Focus** on 2021 recovery programme.

# The impact of the Pandemic on tourism



# International tourist arrivals

January – August 2020



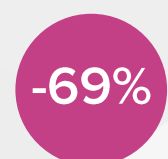
Americas  
2019: 219m (+2%)  
Jan-Aug 2020: -65%



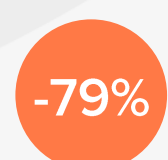
Europe  
2019: 744m (+4%)  
Jan-Aug 2020: -68%



Africa  
2019: 71m (+3%)  
Jan-Aug 2020: -69%



Middle East  
2019: 65m (+8%)  
Jan-Aug 2020: -69%



Asia and The Pacific  
2019: 360m (+4%)  
Jan-Aug 2020: -79%

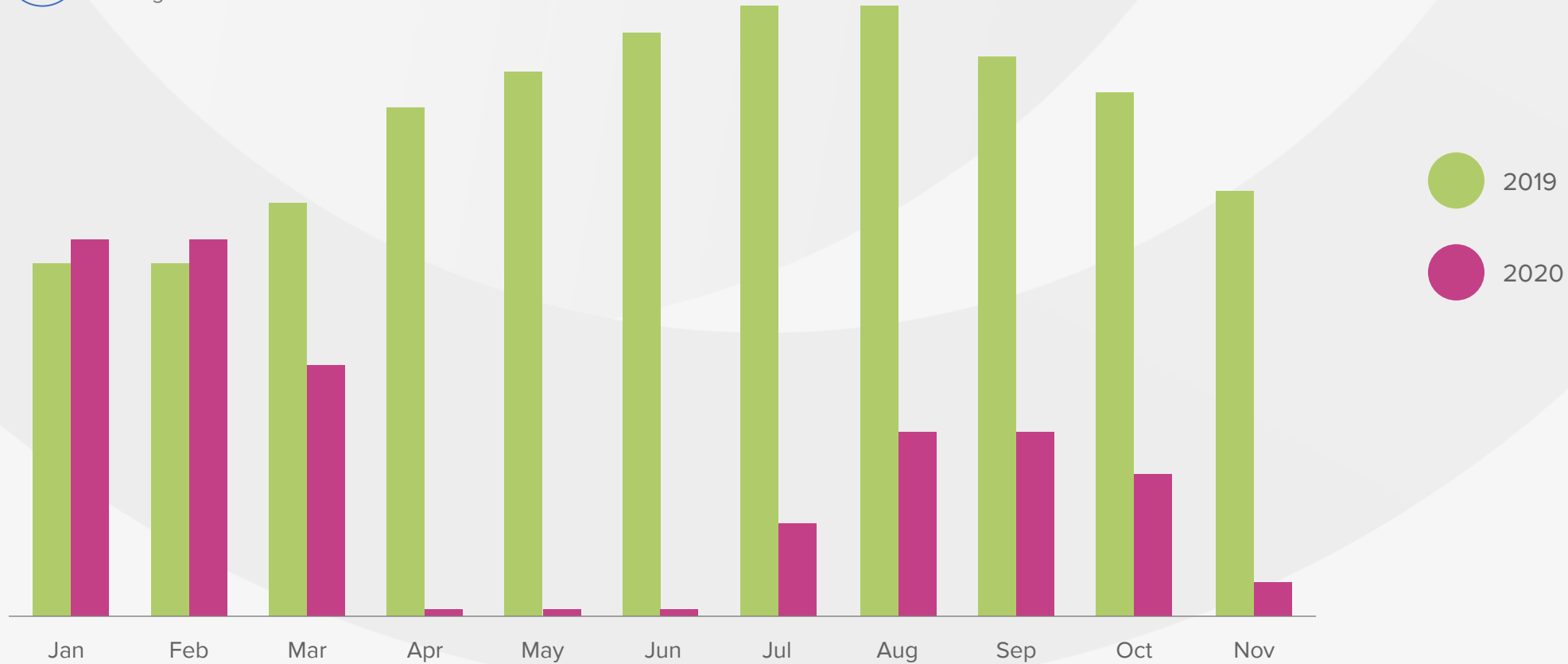
# Impact in Jersey

## Airline capacities, 2019 vs. 2020

PAX  
**-75%**



**Airline capacities**  
Change from 2019 to 2020



# Recovery for Jersey

Recovery to 2019 levels may not be seen until 2023 – 2024.

Contributing factors that will determine our bounce-back rate include:



**Access**



**Vaccine  
Rollout**



**Quarantine  
levels**



**Economic  
Uncertainty**



**Weakened consumer  
confidence**



**Brexit**



**Competitive share  
of voice**

# The future of travel and tourism



# The travel industry

A look at the key trends shaping the industry



## Experts Weigh In On The Future Of The Travel Industry



ttg FOR SMARTER, BETTER, FAIRER TRAVEL TOPICS

PPA INDEPENDENT PUBLISHING COMPANY OF THE YEAR 2019  
CAMPAIGN BUSINESS MEDIA BRAND OF THE YEAR 2020

**NCL** Feel Free

**BLACK FRIDAY SALE**  
30% OFF + RECEIVE ALL PACKAGES\*

UPGRADE FOR £99\*\*  
RECEIVE ALL PACKAGES\*

OPEN BAR • SPECIALITY DINING  
EXCURSIONS • WIFI • EXTRA GUESTS

**EASYJET: 'WE KNOW THERE IS UNDERLYING DEMAND FOR TRAVEL'**

26 NOV 2020 BY JAMES CHAPPLE

Carrier reports more than 200% week-on-week increase in flight and holiday searches following news that UK-wide Covid restrictions will be eased over Christmas

**BREAKING NEWS**

## Hays Travel acquires Tailor Made Travel out of administration

05 SEP 2020





# Consumer demands

A look at the key consumer demands



Flexibility



Trust



Innovation



Sustainable tourism

# Consumer preferences



Passport-free and/or  
staycation breaks  
closer to home



Active and unique, 'off the beaten  
track' experiences that avoid  
crowds (walking, cycling, fitness  
and relaxation)

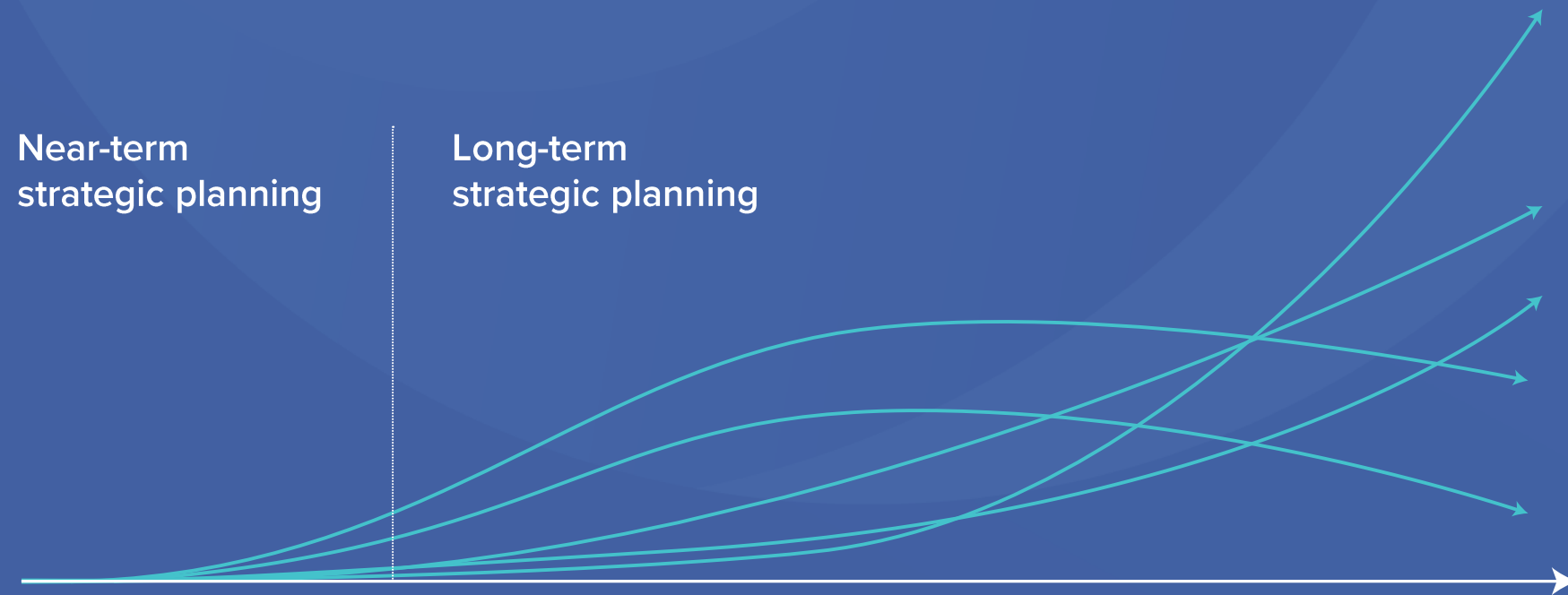


# Visit Jersey's response



# The fog of uncertainty

## Strategy vs. scenario planning



There are already promising signs for how Jersey can take advantage of the change in tourist behaviours and demands.

Key factors



Access to the island



Rollout of a vaccine



PCR testing at borders

# What has changed? And what hasn't?

Our brand proposition remains a guiding force for uncertain times

## PURPOSE

To ignite a new wave of pride and passion for Jersey by reminding ourselves and the world just how special Jersey is as a place to reconnect and revitalise.

## POSITIONING

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

**AN ISLAND OF  
REDISCOVERY**

## VALUES

Individuality  
Curiosity & Optimism  
Togetherness  
Natural Harmony

## PERSONALITY

Fresh  
Bold  
Spirited  
Fun



# Our focus for 2021



## Brand

Competitive standout and awareness for Jersey.



## Insight

Best market prospects, target audiences and customer segments.



## Product

Defining and develop with Industry experiences that motivate our customer segments.



## Trade and industry

Optimise access and trade relationships and opportunities.



# Insight

Best market prospects, target audiences and customer segments

A

Recover our base as soon as possible

B

Changes in demand and behaviours

C

Target best prospects

Recover UK market as priority

Best prospects segmentation and profiling

Trade and PR focus in Germany

French market focus on PR and industry partners



# Product

Define and develop with industry experiences that motivate our customer segments

A

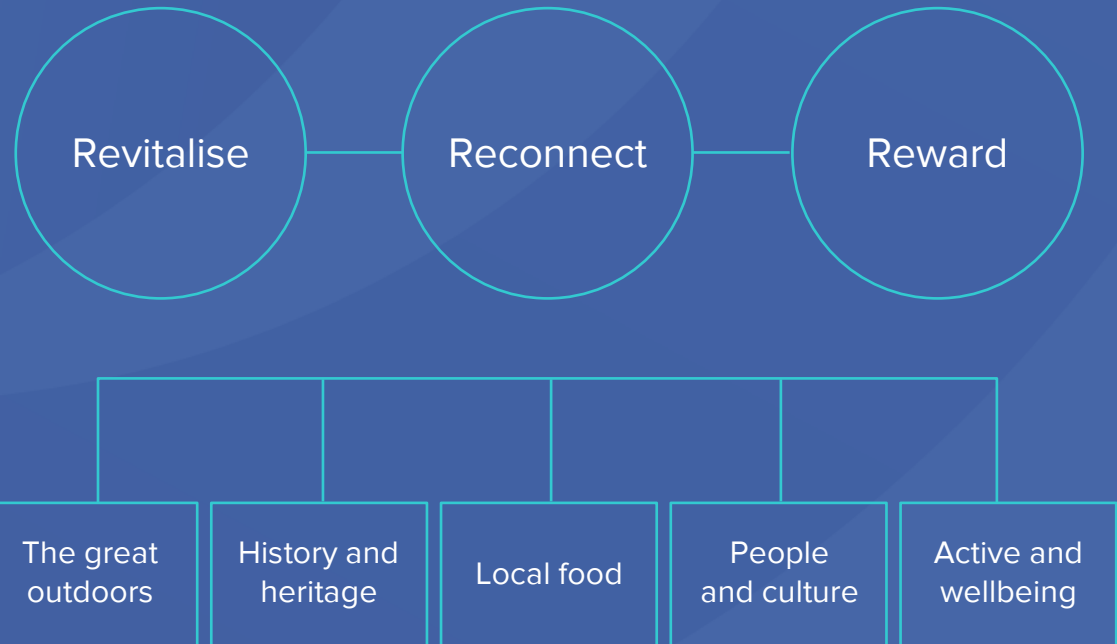
Competitive  
standout -  
storytelling

B

Productivity and  
sustainability

C

Industry  
opportunities  
(250+)







# Events

Make every visitor count – event workstreams

Jersey Big  
Weekend

Jersey  
on sale

Sports events:  
large and small



# Trade

Optimise trade relationships and opportunities

A

Access critical to recovery

B

Strengthen partnerships

C

Maximise awareness and distribution

D

Optimise demand for travel professionals



Co-op marketing

Revamp educational tools and assets

New distribution operations

Retain and build existing relationships





# Marketing

Competitive standout and awareness for Jersey

Advertising campaigns



Reach 7.3 million ABC1 Adults in the UK

Spring/Summer campaign, 26 Dec – 30 March

Autumn / Jersey On Sale

Push for fighting fund to amplify Jersey brand messaging

Always-on activity



Website – inspirational content hub

Digital – PPC, SEO

Social Media – Facebook, Instagram, Twitter.

PR – content-led news stories

eNews and CRM.

Projects



Websites refresh

- Consumer April 2021 (enabling more partner usability)

- Business H2

Assets and Imagery review H2

# 2021 Spring/Summer campaign

Campaign workshops to be held 11<sup>th</sup>, 15<sup>th</sup>, 18<sup>th</sup> December 2020 and in January 2021

Jersey is ready to welcome back visitors

Capture what sets Jersey apart so well and what it offers to an audience with a desire to travel but with the need for reassurance.

Target Audience: ABC1C2 adults, 25 – 65+ years.

Media: 60”, 30”, 15” video - digital and owned assets, press and print advertising, PR activation, social and toolkits for industry and trade.

National and Regional buying. Cooperative marketing.

# Thinking longer term

We can review and reset our 2030 destination plan



Review situation



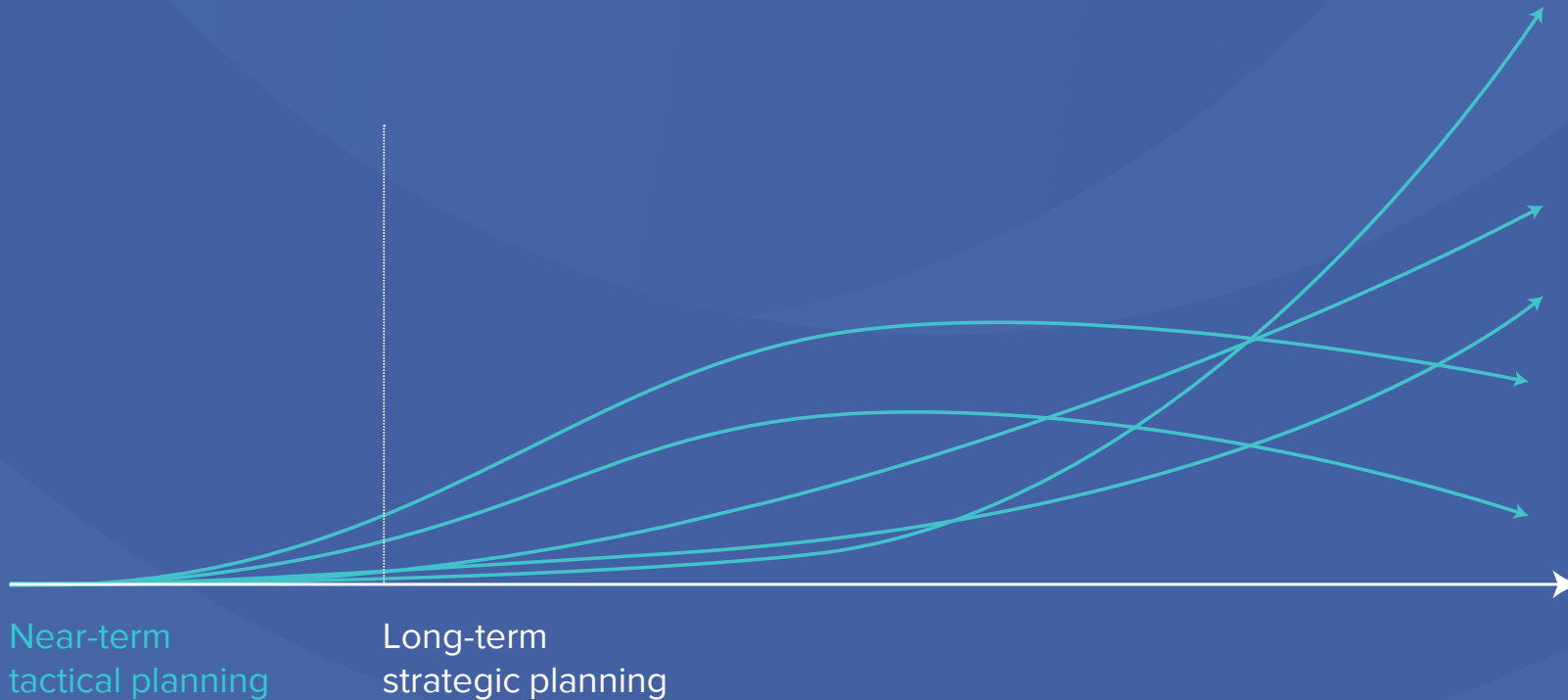
Reset the boundaries



Recover, as quickly as possible



Renew our business and destination plan



## Taskforce



A viable year-round visitor economy



Smarter tech



Responsible tourism

# Big ambition for the future

