visit Jersey

Annual Report 2015

Contents

Visit Jersey's annual report summarises the key activities undertaken over the period 30th March to 31st December 2015, commenting on our operating environment and key achievements in our mission 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.

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Jersey's tourism sector is a vital component of our economy, our community and our natural and built environment. Hotels, attractions, transport links, heritage, arts, culture and restaurants not only support tourism but also are an important element of the broader attraction of the island to businesses, communities and residents. We can be justifiably proud of our tourism sector and I look forward to seeing it flourish and grow in the years to come.

Senator Ian Gorst
Chief Minister

The States of Jersey recognises the sector's importance and I look forward to working with Visit Jersey and across government to deliver the Destination Plan which represents a shared agenda that can grow our visitor economy. We will need to work hard to market the island to ensure that we deliver the ambitious targets in the Plan that will see more visitors experience the very best that Jersey has to offer.

Lyndon Farnham
Minister for Economic Development, Tourism, Sport & Culture

"

Visit Jersey Chair Foreword

John Henwood
Chairman, Visit Jersey Limited

Financial performance

Although incorporated on 26 September 2014, Visit Jersey did not take over from the States of Jersey Tourism Department until 30 March 2015, so the accounts set out in this Report, though covering a longer period, reflect nine months of operations. Of the agreed government grant of £5.2 million for 2015, £2.6 million was received by the Company, the remainder having been spent or committed by Jersey Tourism in the first three months of the year. The largest items of expenditure were marketing and digital costs of £1.6 million and staff costs of £0.8 million. Overall, costs are tightly controlled with services outsourced where appropriate for maximum efficiency.

The Journey

In January 2013 the States of Jersey approved the setting up of the Tourism Shadow Board (TSB) which spent a year taking evidence before reporting to the Minister for Economic Development early in 2014. The Minister accepted the TSB's recommendations, which were based on the firm conviction that the decline in tourism could be turned around. So, Visit Jersey's long term objective is to reverse the trend and achieve a million visitors, spending £500 million a year, within 15 years.

It is much too early to be making extravagant claims about the Company's achievements, but we have a strategy, the Jersey Destination Plan, that plots a course toward these key goals and during our first 9 months of operation we have taken the first positive steps. Last year staying leisure visitors were up 2.7% on 2014 and the aggregate visitor spend was also up, by 4.7%.

Of course, it's important to acknowledge that Visit Jersey will not achieve anything alone. We began with a commitment to work closely with the tourism industry and have maintained a partnership approach in all that we do. Our job is to create a desire to visit our Island, when here it is up to industry practitioners to make sure visitors have a great time. I should like to take this opportunity to thank our industry partners for their positive engagement with us, for their support and the trust they have invested in Visit Jersey.

Our Work

In this annual report we set out in more detail the work we have undertaken and in particular our belief in the future of digital marketing, which allows much greater effectiveness of our marketing spend. The Company has also made significant investment in research, an essential element in targeting the market efficiently. In short, we have taken the wishing and hoping out of the equation, replacing it with clear-eyed analysis and measurement of results. This way, every pound is spent to good purpose.

Our mission is to promote tourism to and within Jersey and we believe, if we demonstrate to the community that we are achieving not only positive results, but also exceptional value for money, support for tourism as a vital economic and social component of local life will continue to grow.

Government's role

Having taken the decision to withdraw from direct promotion of Jersey as a destination, placing that responsibility with Visit Jersey, it's natural that we will come under close scrutiny from government.

We would expect nothing less and we will continue to work closely with government and particularly with the Minister for Economic Development, Tourism Sport & Culture, who is such an effective cheerleader for the industry.

Government has a vital role to play. As the TSB pointed out, the States' financial support for tourism is half what it was 15 years ago and our government needs to think carefully about its investment policy. In the holiday and leisure sector Jersey has an established source of wealth creation and in its pursuit of economic diversity our government would be wise to extend its investment in tourism, creating more jobs and additional GVA growth.

Looking ahead, as tourism grows in the years to come, government must continue to be more joined-up and supporting in its approach. In particular, we would encourage the Environment and Infrastructure Departments to carefully consider how best to support tourism. Education also has a key role to play in making tourism an attractive career option for our young people.

The Treasury should reflect and calculate the effect of continually increasing the duty on alcohol, and on a similar topic, a question for the Health Department, why should visitors to Jersey be denied the 'happy hour' that they have become accustomed to almost everywhere else?

Perhaps the underlying truth is that government had come to believe that the decline of tourism was inevitable and that it didn't really matter. It isn't and it does. Much of the past negativity has evaporated, but some residual lack of enthusiasm for the industry lingers on. We are still in need of a New Deal for tourism.

Farewell

I feel very privileged to have been asked, in 2012, to head the process that led to the setting up of Visit Jersey. Having seen the Company through its first year of operation, and taken considerable satisfaction at the progress made, it's time to step back and allow others to steer it through the next stage which, I have not the slightest doubt, will ultimately lead to the achievement of its key goals.

"Looking ahead, as tourism grows in the years to come, government must continue to be more joined-up and supporting in its approach."

STAYING LEISURE VISITORS

2.7% ▲

VISITOR SPEND

4.7% ▲

Our Role

Visit Jersey was formed on 26th September 2014 and began trading on 30th March 2015. The Company's 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.

VISIT JERSEY'S LONG TERM PRIORITIES ARE TO:

Inspire visitors from overseas to visit and explore Jersey

Maximise public investment through partner engagement

Advise government and the industry on tourism issues, particularly those affecting our competitiveness

Visit Jersey is the tourist board for the States of Jersey. We aim to ensure that tourism to Jersey thrives by working in partnership to build the sector's successes and secure a sustainable future for our tourism businesses and for the visitor experience across Jersey.

The Company was effectively in start-up mode in 2015. We recruited a talented team and put in place processes to manage our business. We pursued a data-led approach to marketing and research. Destination marketing can often be fragmented in nature and Visit Jersey is single-minded in our approach to building partnerships, with on and off-island partners to further our ambitions for the Jersey visitor economy. In 2015 we completed a substantial amount of research, started to improve our storytelling - content creation and curation, built effective marketing and travel trade campaigns, put serious efforts into product development and prepared the ground for a new Jersey brand, a new tourist information centre and new marketing tools and platforms.

During 2015 Visit Jersey achieved the following:

Operational

- Recruited an executive team of 14
- Started the process of transferring business systems and processes for IT, HR, finance and administration from the States of Jersey platforms to new ones
- Planned for the move of the Visit Jersey office and visitor information centre from Liberation Place when the lease expired in February 2016

Policy

- Established a data-evidence approach to inform policy debates
- Consulted on the visitor economy and published the Jersey Destination Plan

Programmes

- Completed legacy marketing and an events programme initiated by Jersey Tourism, the predecessor body
- Commissioned market research in all our continental European and UK markets
- Consumer research shared with industry partners and government departments
- Delivered marketing campaigns (see Stimulating Consumer Demand section)
- Extended the Fete de Noué, which was a three day event, to a six-week Winter Festival
- Supported UK tour operators with Jersey destination marketing campaigns including newspaper inserts in national and regional press as well as online advertising
- Changed the Autumn Walking Week to an Autumn Walking Festival
- Launched a consumer social hub (www.experiencejerseyci.com) to share information and ideas
- Project managed the Channel Islands World Travel Market stand where Jersey tourism suppliers met travel trade buyers from the UK, Germany, The Netherlands and Scandinavia
- Reviewed Visit Jersey's marketing tools such as jersey.com website ready for redesigning in 2016
- Following a tender, FutureBrand was instructed to help deliver the Jersey brand project supported by a local agency- The Observatory to ensure best value and best result for Jersey

La Fete de Noué; previously a three-day event became a six-week festival in 2015

Our Operational Environment 2015

Jersey Destination Plan
Published in September 2015, the Jersey Destination Plan set out future priorities and activities in a systematic way to grow Jersey's visitor economy through to 2020. The Plan is a shared statement of intent and suggested recommendations. This is a long-term, whole of government-industry accord with all participating in creating the conditions for growth as well as being responsible for delivering specific activities.

The Plan lists four drivers of tourism growth:

- Market development
  agree who are the best prospects to increase volume and value of the Jersey visitor economy
- Image development
  develop and promote "reasons to visit" Jersey
- Access development
  make it easier to get to and around Jersey
- Destination development
  Create, package and deliver compelling experiences

21 recommendations are listed which collectively can help drive sustainable growth in Jersey's visitor economy (see opposite)

A basket of performance measures are included in the Destination Plan.
For 2015, the major KPI's were met as shown below:

Key Performance Indicators	2020 Target	2019 Target	2018 Target	2017 Target	2016 Target	2015 (T) Target (A) Actual	2014 Actual	2013 Actual
Gross Value Added for hospitality sector*	Benchmark+ x%	Benchmark+ x%	Benchmark+ x%	Benchmark+ x%	Establish Benchmark	**Awaiting data**	3.8% £149m	3.77% £138m
Total visitors	800,000 (+2.22%)	782,700 (+2.22%)	765,700 (+2.22%)	749,100 (+2.22%)	732,900 (+2.22%)	**(T) 717,000 (+2.22%) (A) 718,000**	701,430	681,900
Visitor spend-nominal (2.49% pa 2015-20)	£310m	£294m	£281m	£267m	£255m	**(T) £243m (A) £243m**	£232m	£230m
Staying leisure visitors total	389,000	380,000	372,000	361,000	352,000	**(T) 345,000 (A) 347,000**	337,000	325,800
Island RevPAR**	Benchmark+ x%	Benchmark+ x%	Benchmark+ x%	Benchmark+ x%	Establish Benchmark	**na**	na	na
Average bed occupancy-August	89%	88%	88%	88%	86%	**(T) 85% (A) 90%**	85%	79%
Net promoter score of visitors	+2%	+2%	+2%	Base + 2%	Base to be set	**na**	na	na

* GVA: we do not know the true number. Research will be done to improve our understanding of tourism's impact and establish a benchmark in 2016
** Island RevPAR: revenue is a widely accepted measure of revenue per available room; a performance metric in the hotel industry that is calculated by dividing a hotel's total guest-room revenue by the room count and the number of days in the period being measured

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 3 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. VJ 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-lead 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

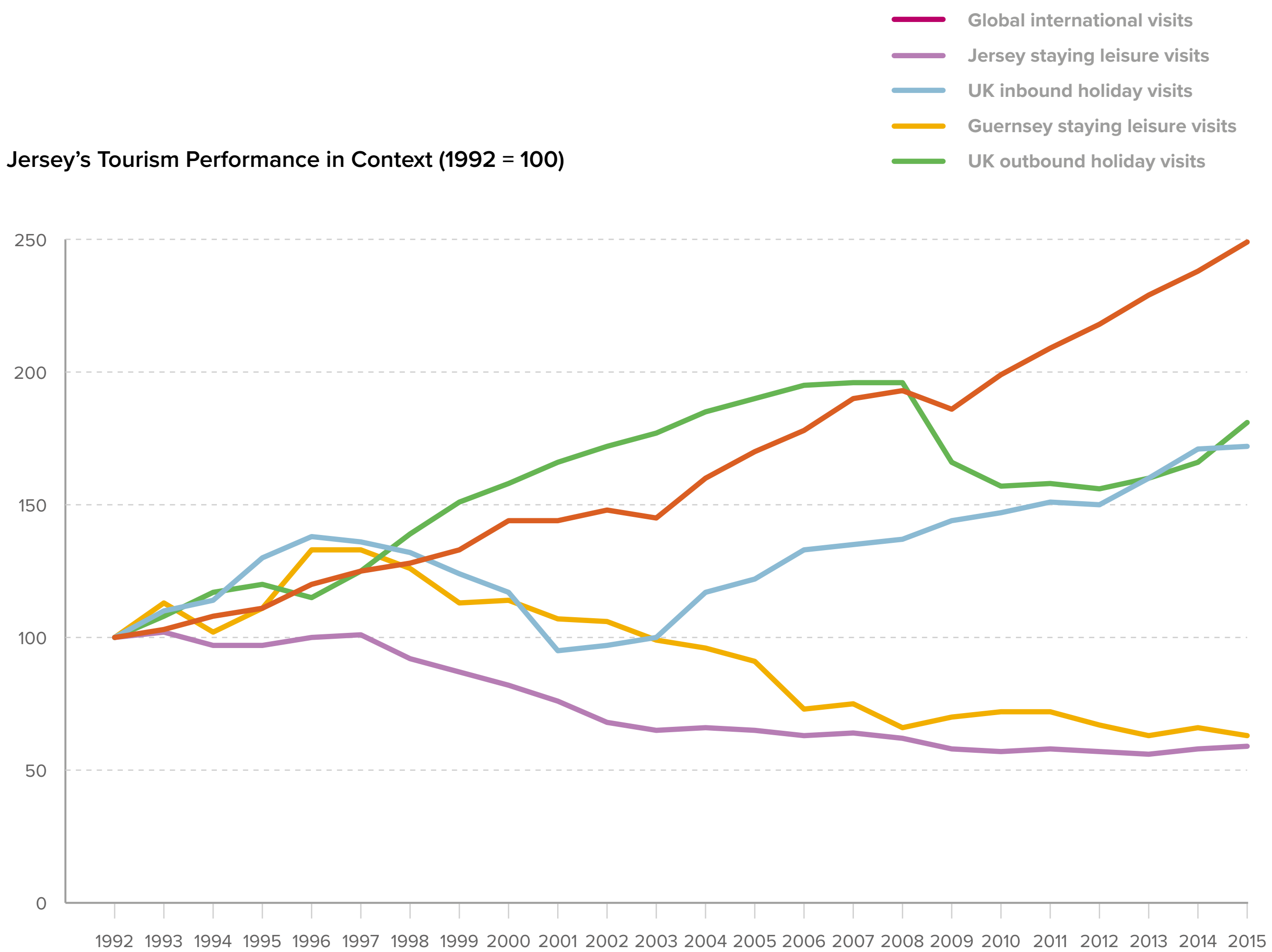
The Tourism Landscape

The Big Picture

No two years are ever alike when reviewing tourism statistics but there are some observations that are quite clear when looking at global tourism over the past fifteen years.

Despite setbacks such as the events of 11th September 2001, a global financial crisis and much else, the number of international tourism trips last year was 73% higher than was the case in 2000. Much of this growth has been driven by travel by residents of 'emerging markets' such as China, India and Brazil.

In short then, tourism is a growth industry. At least that is true for most destinations, but until recently the trend for staying leisure visits to Jersey had been rather different, with a 27% reduction since the turn of the century. This does represent a somewhat better outcome than has been experienced in Guernsey where numbers fell sharply during the early part of the past decade leading to a 45% decline in staying leisure visits.



Jersey's Tourism Performance in Context (1992 = 100)

Jersey's 2015 Performance in Numbers

The past year brought a solid performance for Jersey's visitor economy, with 718,000 visits putting us on-track to achieve one million visits by 2030. The total amount spent on-island by visitors was £243m, or £338 per visit. Put another way, this is equivalent to expenditure of around £2,400 per Jersey resident.

It was the strongest year for staying leisure visits since 2008, with this segment accounting for 48% of all visits but 70% of total visitor expenditure.

It was a record-breaking year for both Business Visits and trips to Visit Friends or Relatives, which between them accounted for 225,000 visits and £57m worth of visitor spending.

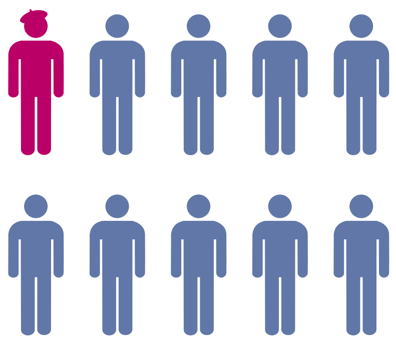
2015	Visits		Spend	
	000s	% Change	£m	% change
Staying Leisure Visits	347	2.7%	170	4.5%
Business Visits	118	4.5%	32	10.8%
Leisure Day Visits	108	-0.8%	5	-1.6%
Visits to Friends and Relatives	107	4.4%	25	5.2%
Visiting Yachtsmen	19	-5.5%	2	-5.7%
Conference Delegates	3	0.6%	1	14.7%
Language Students	3	-13.7%	3	-16.7%
Other Visits	13	-0.8%	5	-1.4%
Total Visits	**718**	**2.3%**	**243**	**4.7%**

Markets

The UK is the mainstay of the staying leisure visits market, accounting for roughly three-quarters of both visits and visitor expenditure. The importance of the UK market has diminished a little over the past fifteen years; in 2000 it accounted for 80% of visits and 85% of visitor expenditure.

One-in-ten staying leisure visits is from France, but due to a relatively short trip duration this market represents just 6% of visitor spending. The reverse is true for Germany, despite only representing 4% of staying leisure visits it contributes more than 6% of visitor spending.

In terms of mode of travel used to reach the island 72% of staying leisure visits are by Air, with 28% by Sea.



One-in-ten staying leisure visits is from France

28%

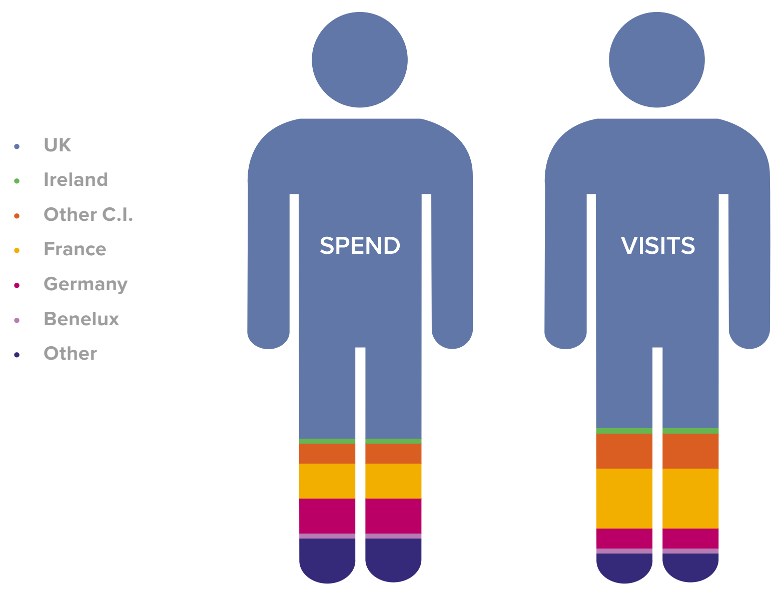
Staying leisure visitors travel by sea

72%

Staying leisure visitors travel by air

Staying Leisure Visits and Visitor Expenditure in Jersey, 2015

Staying Leisure Visits to Jersey from Great Britain are seasonal, with the peak month of August accounting for nearly 18% of annual visits but January delivering less than 2% of the annual tally.

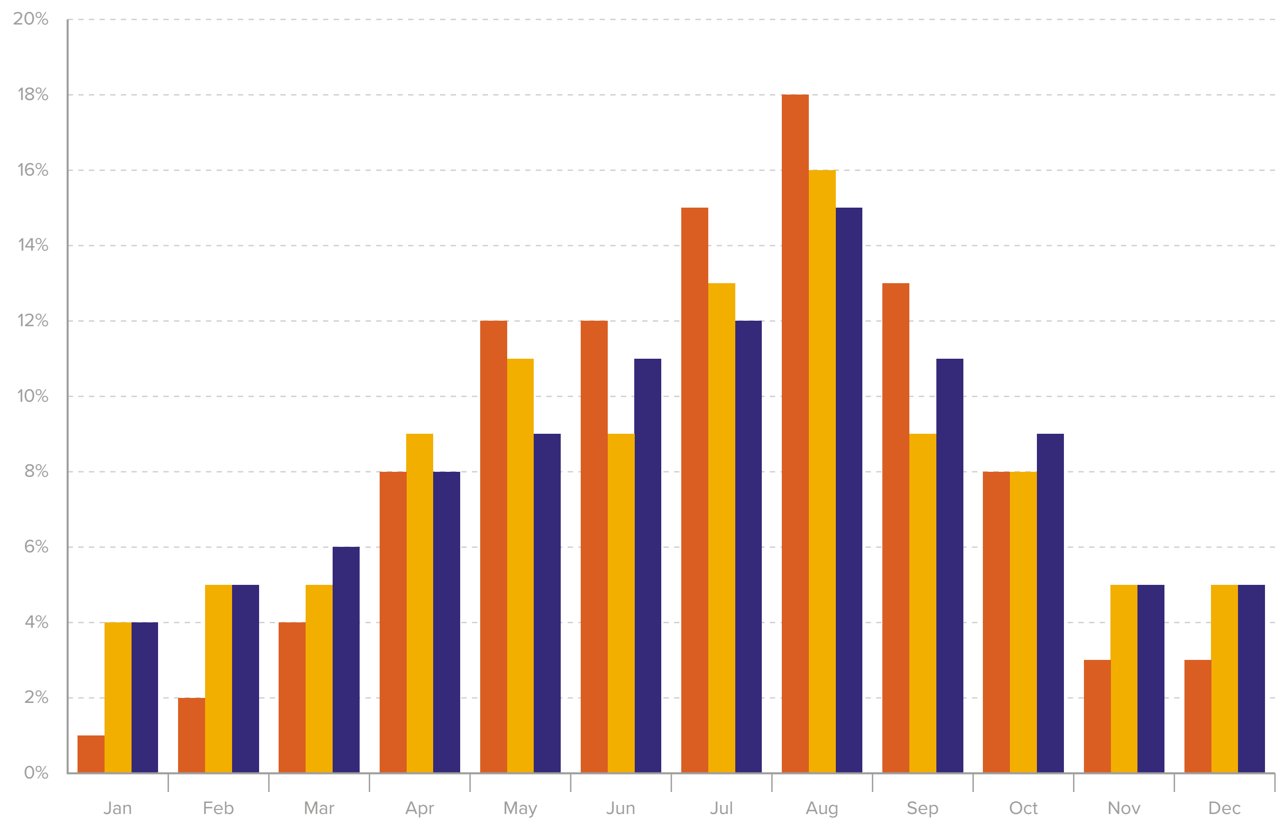


Seasonality

While all destinations tend to experience some degree of seasonality the pattern in Jersey highlights the opportunity to grow demand in the quieter months. Both outbound holiday travel from Great Britain and domestic holidays taken within Great Britain portray a seasonal pattern, but to a much lesser degree than is the case for leisure travel to Jersey.

It is interesting to note, the existing accommodation stock is sufficient to absorb the ambition of one million visits by 2030, even were no establishments to extend their season.

- Jersey staying leisure visits
- GB Domestic holidays
- GB Outbound holidays



Intention to Visit

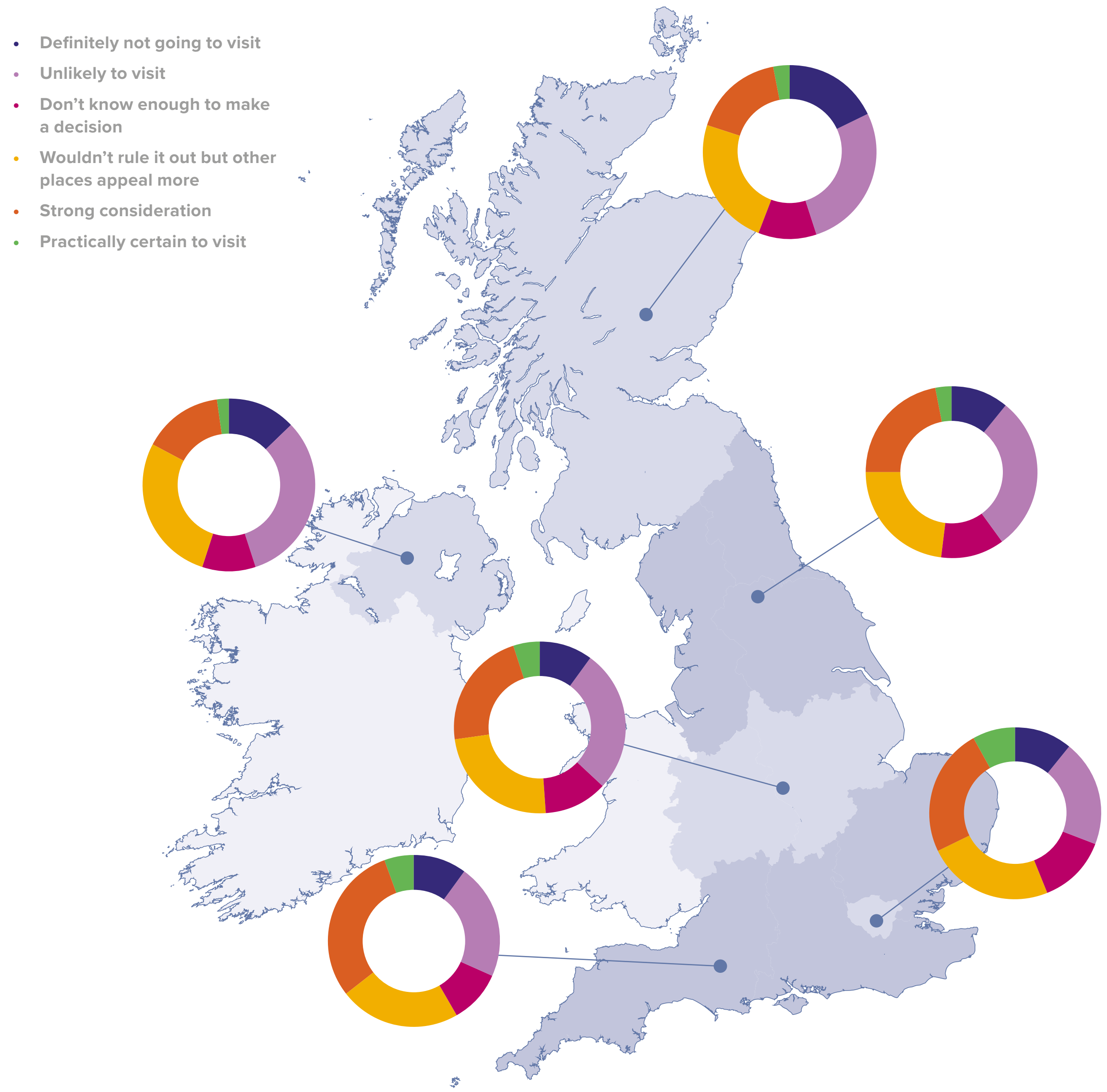
Jersey enjoys excellent connectivity to our most important source market, the UK. Over recent years the route network has grown with the addition of EasyJet routes from London (now both Gatwick and Luton) as well as other UK cities such as Liverpool, Glasgow and Belfast.

Understanding how easy it is for visitors from different areas to reach Jersey is important, but so too, is good consumer insight into the likelihood that they will actually consider a visit.

Research among UK holiday-makers revealed that around one-in-four had at some point in the past visited Jersey, but in comparison with other competitor destinations there is a higher probability that those who had been to Jersey undertook their trip more than a decade ago. So for the vast majority, knowledge of what Jersey has to offer is not first-hand, and for many of those with first-hand knowledge their memories will have faded and do not match the reality of what Jersey offers today.

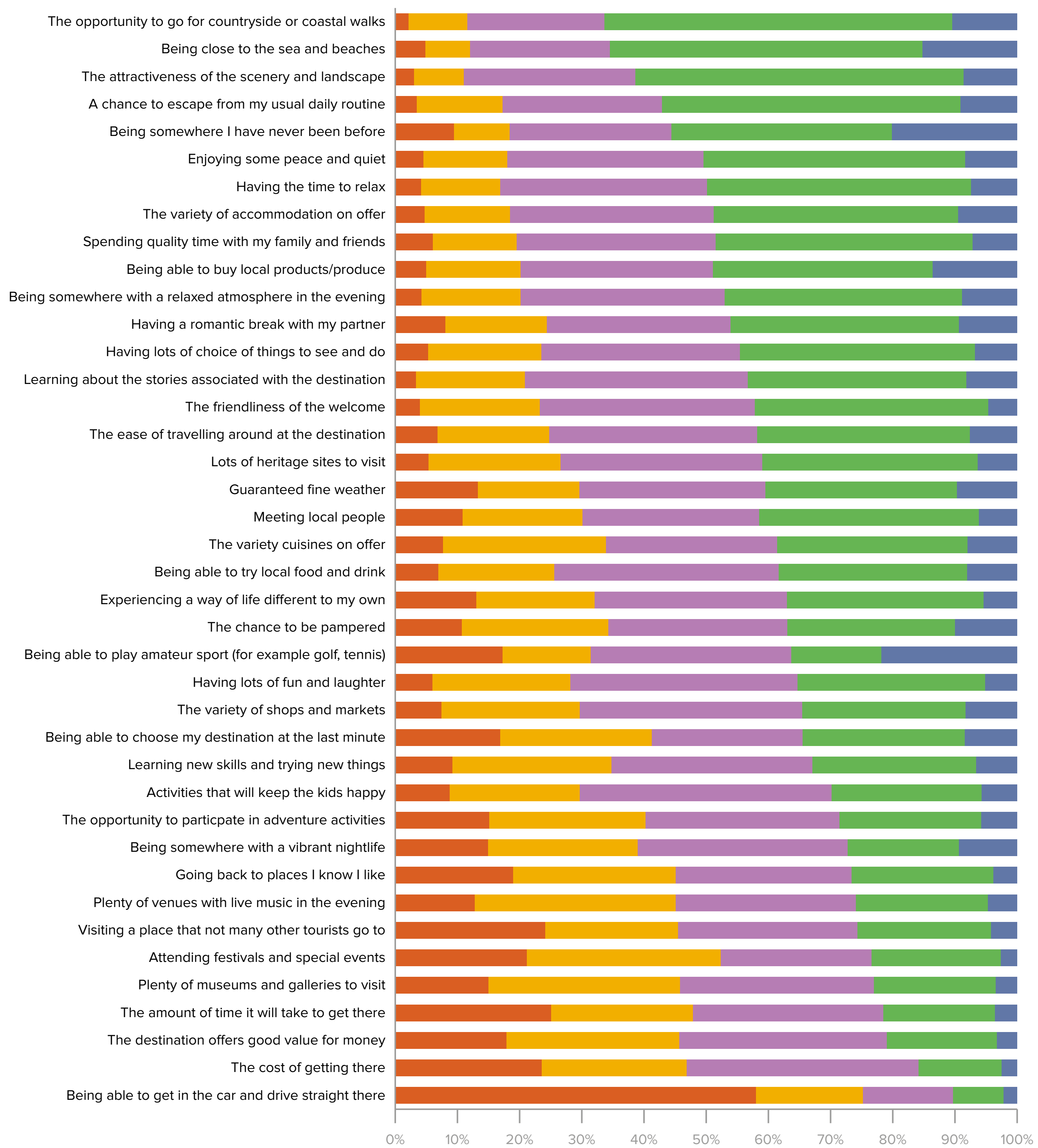
The best levels of consideration for a future visit to Jersey are at the strongest in London and the South of England and gradually diminishes for those who reside in areas further north and west. In addition to around 8 million people who report positive intentions there are a further 11 million who say that they wouldn't rule it out but currently other places appeal more, or that they need more information to make a decision.

Intention to Visit Jersey Graph



Perceptions of Jersey

While many have little first-hand experience of Jersey it is helpful to take a look at how Jersey is perceived, what Jersey is thought to be good for, and what Jersey is thought to offer? For instance, Jersey is believed to offer a number of positive qualities including 'the opportunity to go for countryside or coastal walks', 'being close to the sea and beaches' and 'the attractiveness of the scenery and landscape'.



Perceptions are only one part of the story. What actually motivates destination choice? The grid below shows the degree to which different attributes are perceptual strengths and weaknesses for Jersey and which attributes have traction in influencing destination choice.

How consumers choose destinations

One of the biggest revolutions in the tourism world over the past decade and a half has been the way in which consumers 'look' and 'book' travel. Budding tourists are now able to find the best fares for travel, the best hotel deals, read the views of fellow travellers before choosing their destination all from the comfort of their sofas. Those who believe that only the younger generation use an iPad or turn to TripAdvisor when thinking about holiday destinations are somewhat out of date. Visit Jersey research confirms that almost six-in-ten of those aged 65+ had been influenced by material they had seen on websites for their most recent destination choice.

Overall personal experience and the recommendations of friends and relatives remain key influencers of destination choice but unlike in 2000 much of this transfer of knowledge takes place through a screen, and often from an extended social network rather than just close family or friends. At present it is only the youngest group who cite social media as being a significant influencer on their choice of destination, but as this cohort gets older they won't abruptly lose these habits.

Most recent trip – influences on destination choice

	18-24	25-34	35-44	45-54	55-64	65+
Website	66%	63%	67%	68%	68%	59%
Personal experience	40%	34%	40%	45%	46%	53%
Recommendations of friends, colleagues or relatives	41%	36%	34%	34%	28%	26%
Free brochures	19%	20%	13%	18%	19%	21%
Travel Agency / Tour Operator	19%	21%	15%	16%	19%	20%
Travel articles or advertisements in newspapers or magazines	15%	15%	10%	11%	13%	15%
Social media sites	26%	15%	12%	9%	4%	2%
Paid for guidebooks or magazines	9%	12%	9%	6%	7%	7%
Travel features on television or radio	11%	10%	8%	6%	5%	6%

Accommodation

There was a significant reduction in the amount of hotel capacity in Jersey in the late 1990s and early 2000s, but things have stabilised in the past few years. Rather than focus on the amount of bedspace available if we take a look at the relative importance of different types of stock it is evident that the majority of capacity is to be found in hotels, and their share has changed little since 2000. There has been a decline in the proportion of bedspaces to be found in Guest Houses but an increase in the relative importance of independent self-catering.

Any destination needs to offer a portfolio of different types of accommodation, and recent Visit Jersey research has revealed that there is strong appetite for self-catering accommodation. Further, many consumers have value for money as an important consideration when choosing where to holiday.

Composition of bedspaces available

NatWest Island Games; we partnered with the organising committee to support media throughout the games

Supporting our Industry

Formulating partnerships to generate growth

Trade

Visit Jersey engaged with trade partners to deliver incremental increases in visitors. A co-funded series of activities ensured partners' commercial objectives were met as well as the broader island's visitor economy objectives. Staff organised and attended a variety of trade exhibitions and workshops in principal markets to meet travel trade firms and develop trade relationships.

Suppliers

We partnered with suppliers to ensure a joined-up PR message and established a range of graded supplier partner marketing opportunities. Other notable achievements included:

- Autumn Walking Festival
  Partnered with walking guides to extend the previous one-week festival to two weeks. In total 79 walks were created over 15 days Created a "value-add" set of supplier offers to encourage spend in hospitality and retail outlets
- Winter Festival
  Partnered with the Parish of St Helier, Economic Development Department, Jersey Development Company, Genuine Jersey and a host of event organisers and suppliers to transform a three-day Fête de Noué into a six-week Winter Festival featuring 52 events

Strategic

- Combined with the Ports of Jersey for the delivery of information at the Tourism Visitor Centre
- Contributed to the Coastal National Park working party to support the development, engagement and promotion of a Jersey National Park launching in 2016
- Partnered with Guernsey and the other Channel Islands to produce a 2016 Channel Island Heritage Festival which highlight the Islands' relationship with the sea and coast and drive visitation before the summer season starts- a time of lower occupancy
- Aligned with other regional tourism organisations across the south coast of England, Brittany and Normandy to promote Cycle-West/Tour de Manche linked cycle routes
- NatWest Island Games; we partnered with the organising committee to support media throughout the Games
- Engaged with Education, Sport and Culture teams to establish sports tourism to Jersey potential. This involved significant liaising with sports clubs, associations and event organisers
- Partnered with the Green Tourism scheme to raise awareness and support of sustainable tourism
- Worked collaboratively with the Jersey London Office and BIAN (Bureau Isles Anglo Normandes) to promote Jersey though their networks

Providing advice and support to industry

- Provided advice to industry partners regarding new or potential developments across a range of accommodation types; Airbnb, farm stays, self-catering, etc.
- Supported a number of planning and licensing applications which have the potential to grow the visitor economy or visitor experience
- Provided insights, support and connections to a range of people and organizations planning events and festivals

> The provision of high quality visitor information plays a key role in enhancing the overall visitor experience by creating a positive image of a destination, providing a hospitable and friendly welcome and by creating a genuine sense of place. Source VisitBritain

Providing research and insights

Undertook desk research and commissioned a number of research projects to inform Visit Jersey and our industry. Specifically:

- UK research
  How Jersey tourism has performed in relation to competitor destinations
  What consumers are looking for in tourist board websites
- UK, Ireland and eight European source markets; what motivates people to travel to a holiday destination and how they perceive Jersey in relation to competitor destinations (European results to be communicated in 2016)
- On island
  Jersey Live and International Air Display research was conducted to inform Visit Jersey, government and event organisers about the extent to which these events attract visitors to Jersey
  Executed a new approach that will allow Visit Jersey and partners to better understand how partnership marketing is working and what incremental visits and visitor spend is generated
  Provided the Jersey Attractions Group with insights as to what the visitor is looking for in an attraction helping drive increases in visitor spend

Driving quality and customer service

- Partnered with Quality in Tourism to deliver an accommodation grading scheme
- Supported our island's welcome through the Visitor Service Centre
- Supported the Blue Badge Guide training programme
- Supported the creation of a new Knowledge Host course; upskilling foreign language speakers to help welcome our visitors starting in 2016

Modernising tourist information

Conducted research into visitor information provision. Key findings:

- People expect to be able to access information 24 hours a day, 7 days a week. No one has a monopoly on providing information
- The ways that visitors access information has changed in recent years. Developments in technology and changes in consumer behaviour continue to shape the delivery of visitor information services. There is and will be rapid adoption in the use of technology to access visitor information– particularly via mobile devices
- Social media will play an increasingly influential role. User Generated Content (UGC) will grow exponentially and more videos will be produced. Review sites, such as TripAdvisor, are reported to be the trusted source of UGC

Well informed visitors will potentially move around and explore more and, most importantly, will want to return. "The provision of high quality visitor information plays a key role in enhancing the overall visitor experience by creating a positive image of a destination, providing a hospitable and friendly welcome and by creating a genuine sense of place." Source VisitBritain. These insights will inform our provision of tourism information from 2016 to 2020.

Engaging the overseas travel trade

Visit Jersey has strong relationships with the travel trade and we recognise that third party routes to market, despite the evolving on-line market, remains an important source of steady business for outbound travel to Jersey. Visit Jersey is a member of, and actively involved with leading trade associations, including UKInbound, ETOA, ABTA, ANTOR and BAWTA.

Sustaining routes & developing new ones

Charter routes were supported through co-operative co-funded marketing activity. This is especially important for our continental European summer routes. Additionally, Visit Jersey worked closely with our scheduled airline operators and ferry companies on a series of marketing initiatives designed to drive business and increase passenger numbers to the Island at different times of the year.

The business tourism market

The Jersey Conference Bureau (JCB) closed at the end of May 2015. Visit Jersey assumed the responsibility for the promotion of the meetings, incentive, conference and exhibitions (MICE) market to Jersey. The JCB employed a full time member of staff in the UK and one full time in Jersey with additional support. Hamish Reid, previously employed by the JCB, continued to advise Visit Jersey on MICE prospects. This relationship ended in December 2015. Visit Jersey worked with local Destination Management Companies, the Fort Regent team and on-island suppliers to support MICE business.

Supported the Blue Badge Guide training programme

Stimulating Consumer Demand

2015 Marketing Strategy (April 2015 – December 2015)

- Evolve perceptions of Jersey as a visitor destination through market and campaign development
- Build stronger visitor relationships through digital content and database development
- Provide opportunities for our industry partners through our campaigns

UK Marketing

Escape to Jersey (Summer Campaign)
Our first major marketing campaign focused on shifting perceptions of Jersey by encouraging city dwellers (30-55 year olds based in selected cities) to “escape to Jersey”.

The immersive and interactive ‘Escape to Jersey’ campaign featured first person videos. The videos were designed to appeal to the senses and give an honest taste of a potential break in Jersey. This allowed visitors to ‘try before they fly’. Accessible through a campaign microsite, the videos were designed to evoke a viewer emotion by appealing to their senses and giving an honest taste of a potential break in Jersey without leaving the comfort of the sofa.
A microsite also featured supplier packages, beautiful images of Jersey via an Instagram feed, links to Visit Jersey’s other social media channels, and information about our island.

106,046 VISITORS TO WEBSITE

90,597 UNIQUE VISITORS

On-line banner and re-marketing adverts drove visitors directly to the campaign microsite

7,427 PARTNER REFERRALS

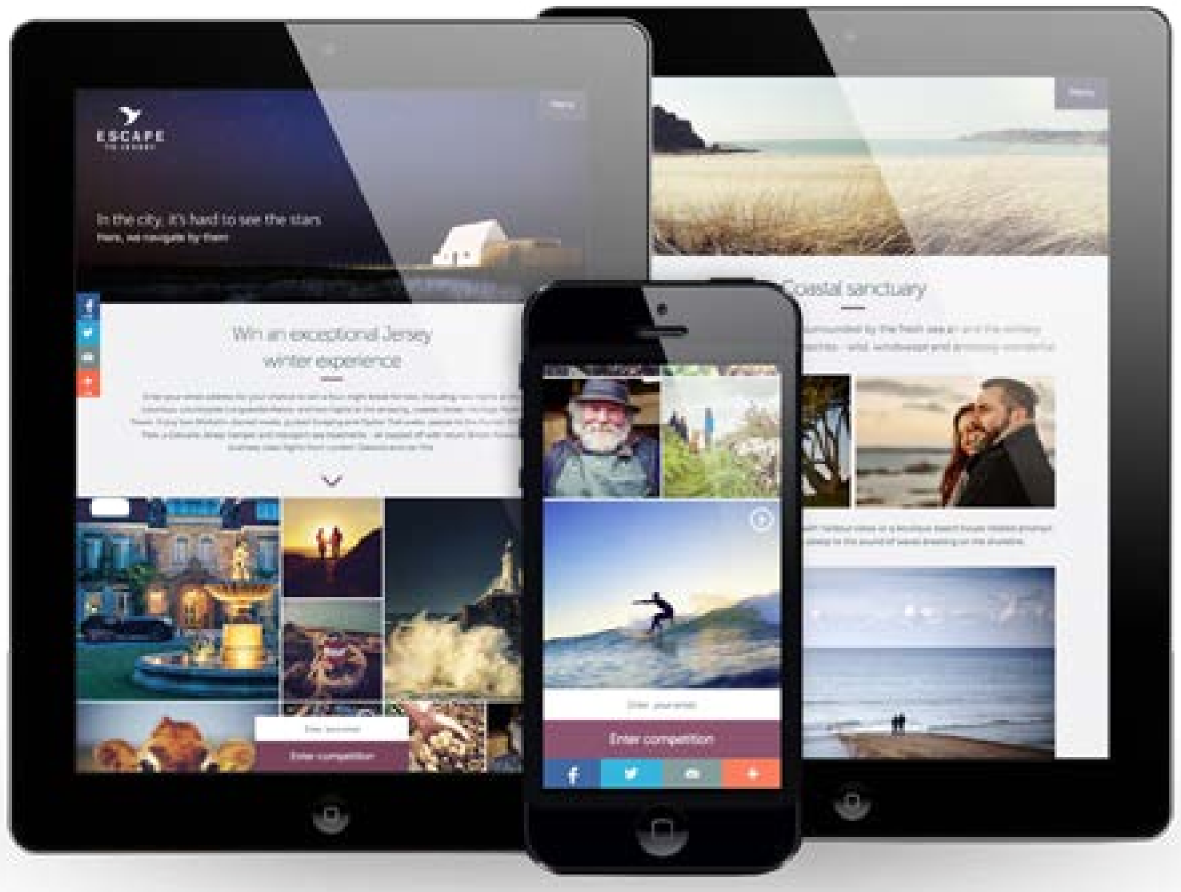
7,097 VIDEOS MADE & SHARED

5,988 DATA CAPTURED

Escape to Jersey (Winter Campaign)

The campaign was an extension of the successful Escape to Jersey summer campaign and highlighted that Jersey offers something for visitors at all times of the year. A dedicated social sharable microsite was created to introduce visitors to local legends, share 'insider' secrets and immerse visitors in the island's winter-time delights including stunning scenery, first-class winter produce and cuisine, relaxing spas and a rich heritage. An advertising campaign ran in various forms including Google pay per click advertising and via major social networks such as Facebook, Twitter and Instagram, and on display advertising on targeted third party websites. This was supported by PR and content syndication activity.

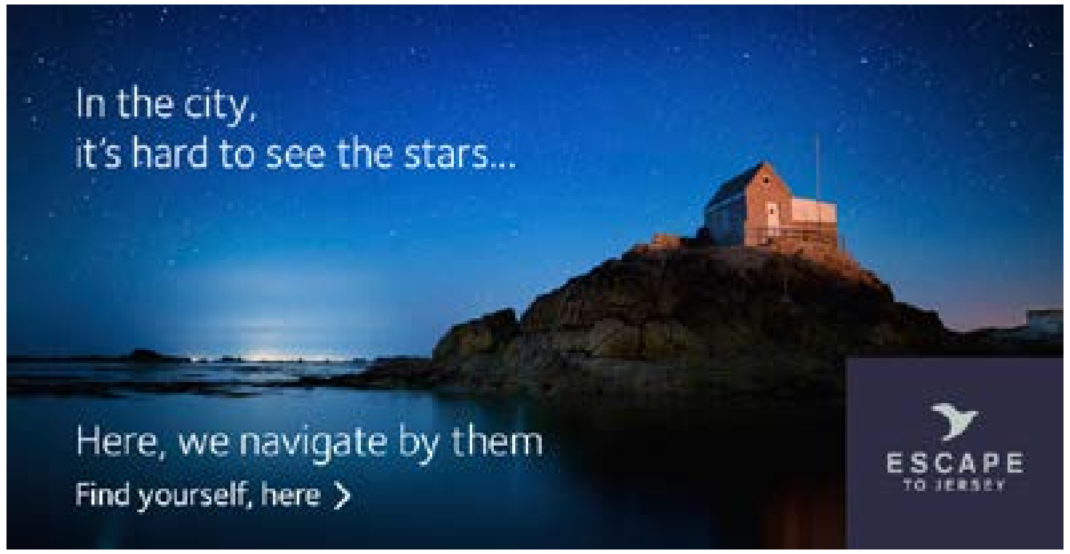
165,972
VISITORS TO CAMPAIGN WEBSITE

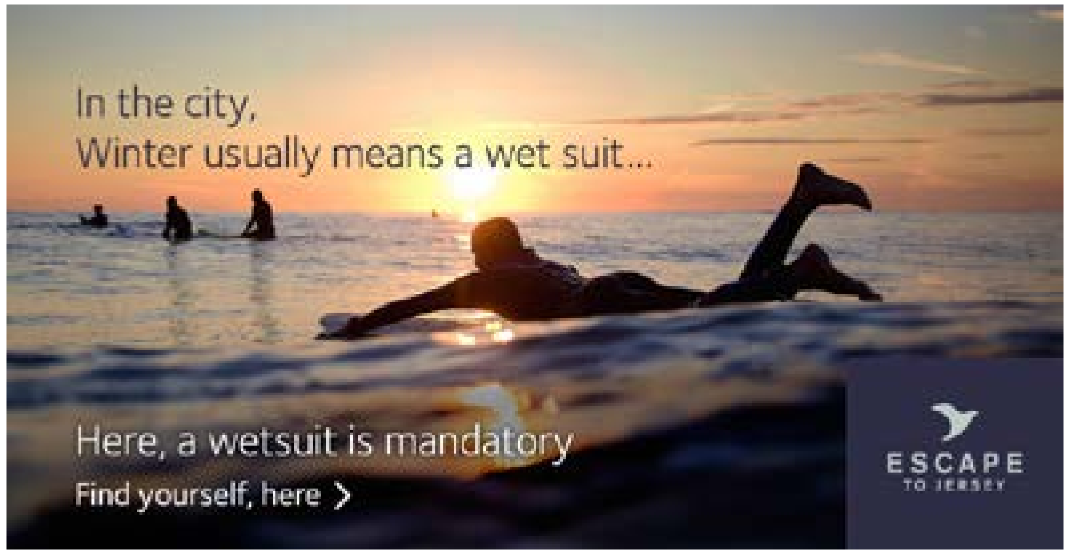


124,886
UNIQUE VISITORS

6,800
PARTNER REFERRALS

16,845
DATA CAPTURED





The Social Hub

A social hub was launched in August 2015 to capture and curate third party content. We pulled content; images and video related to pre-defined hashtags. The content was then used as a call to action to drive visitors to our industry partner websites for conversion.

#

12,270
VISITORS

10,089
CAPTURED CONTENT

560
PARTNER REFERRALS

Germany Marketing

Marketing spend continued to focus on direct to consumer activity with local radio and digital campaigns targeting audiences around the catchment areas of the airports with direct connections to Jersey.

JERSEY.COM
84,002
GERMAN VISITORS

622
RADIO COMMERCIALS IN 6 DIFFERENT STATIONS

15,000
DESTINATION GUIDES DISTRIBUTED

4,000
COPIES OF FLIGHT CONNECTIONS PRINTED IN CO-OP IN GUERNSEY

9,400
CONTACTS MAILED 6 E-NEWSLETTERS

60,000
TARGETED HOUSEHOLDS RECEIVED A DIRECT MAIL CAMPAIGN IN JANUARY

+3%
1,560 = 2015
1,508 = 2014

+7%
252 = 2015
236 = 2014

France Marketing

Activity Focused on billboard advertising in Paris and digital activity in Western France promoting day trips or short break around French public holidays.

JERSEY.FR
193,914
FRENCH VISITORS

I LOVE JERSEY.FR
66,977
FRENCH VISITORS

19,500
CONTACTS MAILED 10 E-NEWSLETTERS

9,400
IMPRESSIONS PARIS, NANTES, CAEN & ROUEN REGIONS

+15%
16,692 = 2015
14,574 = 2014

Our Digital Audience

In June 2015 an interim content strategy was introduced to build stronger visitor relationships and generate visitor advocacy. By improving our story-telling we have seen impressive and sustained growth across all channels.

JERSEY.COM
2,477,105
TOTAL VISITS 2015

- UK: **1,398,458**
- France: **193,914**
- Germany: **84,002**

Total Monthly Visits

2015	Total
Jan	206,290
Feb	184,975
Mar	220,464
Apr	193,978
May	227,209
Jun	217,943
Jul	239,049
Aug	255,285
Sep	189,450
Oct	170,129
Nov	190,534
Dec	181,799

Unique Visitors by Country by Month

2015	UK	France	Germany
Jan	133,180	12,360	8,912
Feb	110,815	15,105	7,815
Mar	122,846	20,118	7,780
Apr	91,495	22,538	8,021
May	113,825	20,841	7,861
Jun	113,988	17,966	7,750
Jul	123,104	22,776	9,276
Aug	144,606	19,803	8,477
Sep	113,322	11,489	5,380
Oct	93,528	12,250	4,804
Nov	122,397	8,776	4,044
Dec	115,352	9,892	3,882

Social Media Audience by Country and Channel

Facebook UK: **+14%**
50,904 > 2015
44,872 > 2014

Facebook France: **+15%**
16,692 > 2015
14,574 > 2014

Facebook Germany: **+3%**
1,560 > 2015
1,508 > 2014

Twitter UK: **+75%**
13,474 > 2015
7,712 > 2014

Twitter Germany: **+7%**
252 > 2015
236 > 2014

Instagram: **+403%**
2,221 > 2015
442 > 2014

Public Relations

We continued to gain excellent media coverage across targeted media that helps create a desire to visit Jersey. In Q4 we adjusted our PR tactic in the UK. Moving away from ease of access “hygiene factor” messaging towards an experience-based message. This was supported and underpinned by our campaigns.

2015	UK	France	Germany
Press Visits	31	10	11
Press Articles	832	121	696
Opportunities to see	688,342,309	441,537,095	56,308,251

What's next with Keith Beecham

The Destination Plan for Jersey is our roadmap and Visit Jersey is looking forward to playing a leading part in supporting the growth of the Jersey visitor economy.

We have a beautiful island and we're working hard to bring the world here. As Jersey's tourist board we aim to operate as effectively and efficiently as possible. We strive to bring partners together and ensure the visitor economy remains competitive and produces wonderful visitor experiences. But we live in uncertain times; consumers are thinking more about destination choices and safety, technology continues to disrupt established ways of doing business and the economic performance of our source markets cannot be taken for granted. All this presents both challenges and opportunities for us.

Visitor satisfaction levels with Jersey are high. In 2015 and again in 2016 we won Best Holiday Island in the British Isles as voted by TripAdvisor customers.

So real visitors know what a great holiday you can have in Jersey. Our job to share Jersey's story and help people rediscover the beautiful destination we call home. We have catered over the years for the more mature visitor from the UK and continental Europe who visit for a week or more. We will do all we can to nurture this group. In addition, there is a rising consumer desire to take short break and activity or interest-based holidays. We will be working hard with industry partners to tell our island story and ignite an interest in visiting Jersey.

Quality Products and experiences

The Jersey Destination Plan describes the four key drivers of tourism growth:

Market development

Visit Jersey will:

- Conduct consumer research to identity new sources of visitors
- Set up an exit survey to better understand our visitors and share this knowledge with partners
- Champion an improved way to measure the performance of our lodgings sector

Image development

Visit Jersey will:

- Launch a new destination brand for Jersey
- Work with Visit Guernsey on a Channel Islands marketing programme
- Create a new jersey.com website
- Serve relevant and inspiring content in the places where Jersey's potential visitors look for ideas and inspiration
- Deliver marketing campaigns jointly with partners for all seasons of the year
- Measure the return on investment from our activities and aim to achieve a better than 5:1 ratio

Destination development

Visit Jersey will:

- Work with tourism suppliers to build compelling experiences for our visitors
- With partners, cultivate a year-round events programme including sports tourism
- Develop a best practice guide for event organisers
- Encourage and support tourism and hospitality businesses to innovate and improve their offerings

Access development

Visit Jersey will:

- Support The Ports of Jersey's route development plan
- Deliver co-operative marketing campaigns with charter operators to sustain and build connectivity to Jersey in the summer months
- Monitor fares and publish fare tracker reports periodically

Innovation and Partnerships

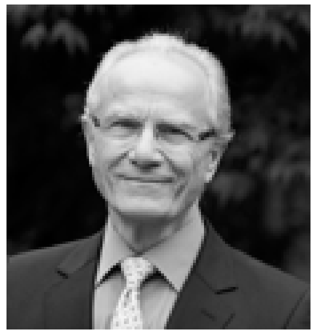
Visitors to Jersey have multiple touchpoints; ports, transport, lodging, eating, guiding, sightseeing, etc. Many organisations and people jointly endeavour to fulfil our visitors' requirements. Visit Jersey set out in our first year of operation how we want to cooperate with the industry and government to make sure visitor experiences are great and they leave as advocates for Jersey. This partnership approach will remain at the heart of our way of working and we are grateful for the Jersey Hospitality Association's on-going counsel in this respect.

Visit Jersey will with partners, cultivate a year-round events programme including sports tourism

Visit Jersey is determined to keep informed of emerging trends- many of them driven by technology innovation- and share our learning with our partners. We will be working with some leading firms to ensure Jersey takes full advantage of technology in our sector. But with a big health warning attached- all this will be driven by our customers. Technology is but an enabler to help us showcase our beautiful island and grow tourism earnings.

Our People

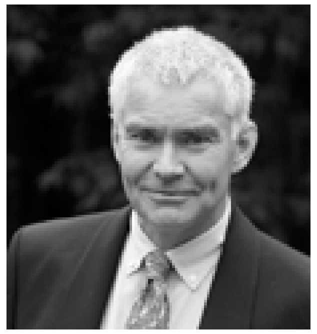
Our Board



John Henwood

David Seymour

Tim Crowley



Mike Graham

Doug Bannister

Sam Watts

Mike King

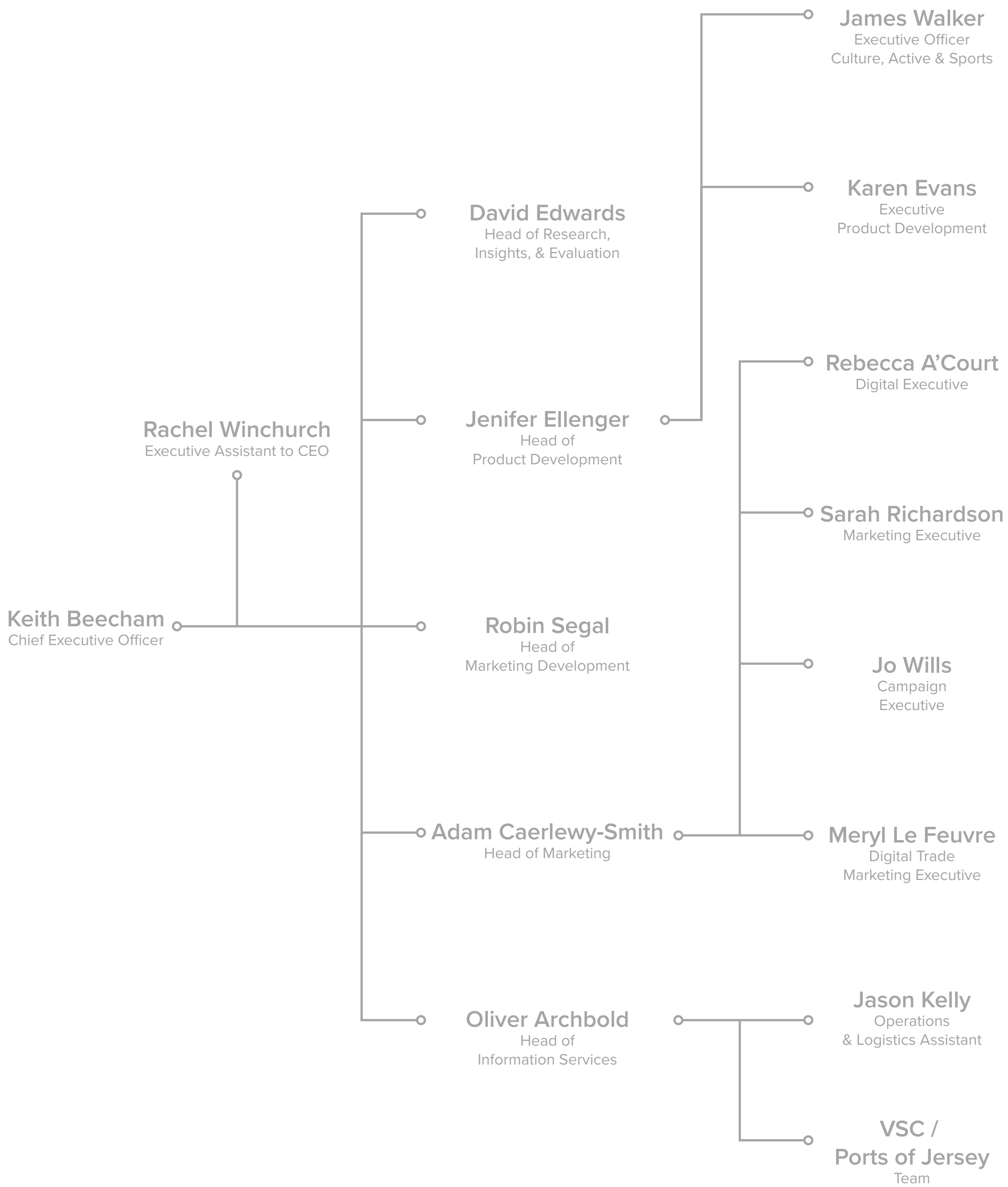
Catherine Leech

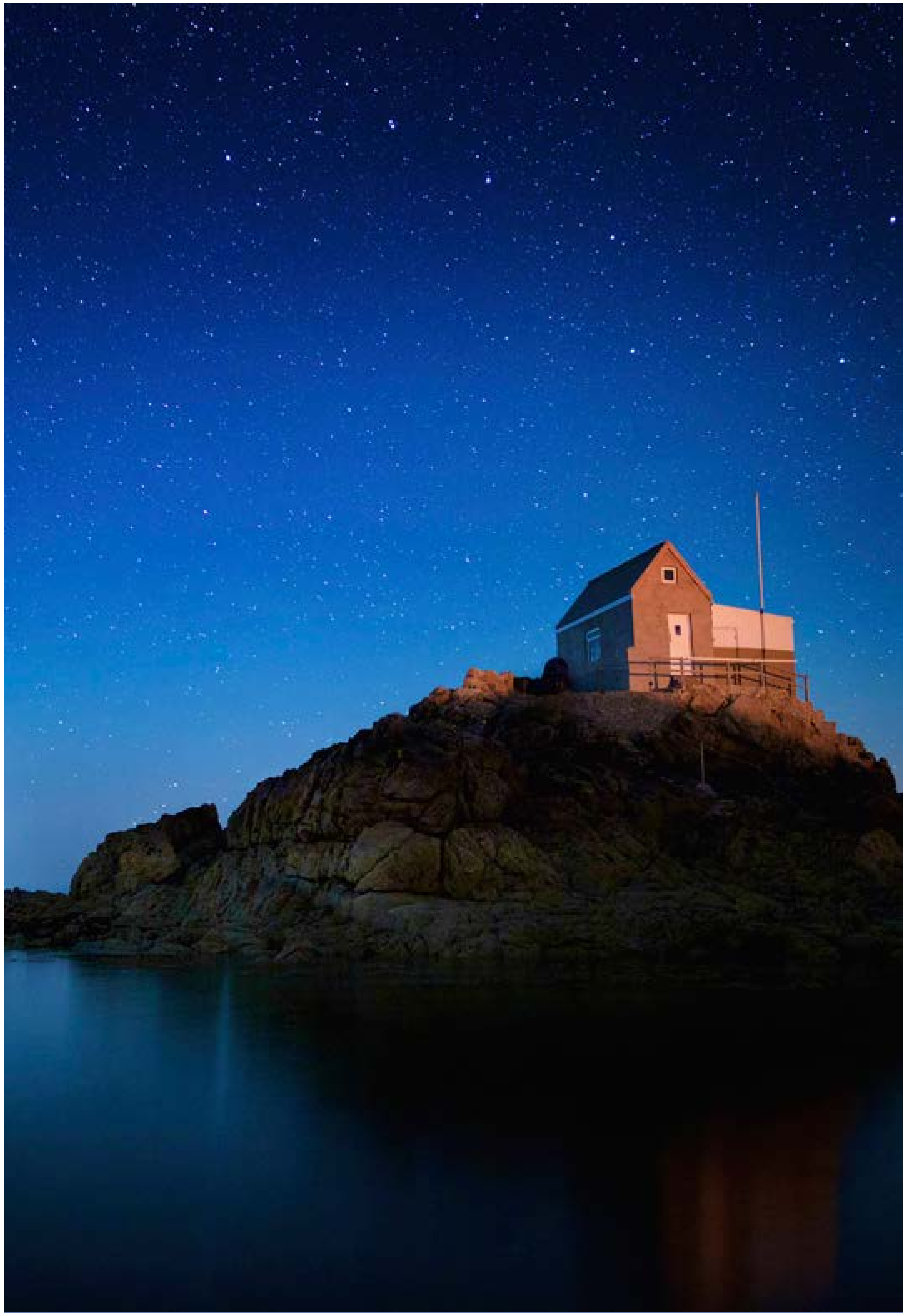
Kevin Keen

Keith Beecham

Our Team

Visit Jersey was a start-up enterprise, but we recognised there was a reservoir of knowledge and experience within Jersey Tourism. The staff of Jersey Tourism were invited to apply for positions with the Company before we went into the market. In the event, seven individuals left the public sector for an opportunity with Visit Jersey and they were the nucleus of the team which Keith Beecham built when he joined.





Financial Report

26 September 2014 to 31 December 2015

	£	£
Turnover		
Visitor Centre Retail	90,719	
Guest Booking Service Commission	31,326	
Marketing & Advertising Income	126,230	
		248,275
Cost of Sales		
Visitor Centre Retail	65,353	
Producing Publications	12,203	
		77,556
Gross Profit		170,719
Other Income		
Grant from States of Jersey	2,578,982	
Income for Gifted Assets	32,000	
Interest Receivable	400	
Sundry Income	138	
		2,611,520
		2,782,239
Operating Expenses		
Marketing & Digital Costs	1,618,379	
Staff Costs	815,666	
Non-Executive Directors' Fees	72,750	
Administrative Expenses	28,914	
Premises Costs	23,605	
Professional & Other Fees	11,189	
IT & Communication Costs	7,480	
Exchange losses	6,430	
Depreciation	5,799	
Motor Expenses	5,039	
Audit fee	5,000	
Bank Charges & Interest	2,558	
		2,602,809
Surplus for the Period		£179,430

Visitor Economy Profile

Visit Jersey – Annual Report Statistical Appendices

An estimated total of 718,000 visits to Jersey were recorded in 2015, an increase of 2.3% on 2014.

Staying Leisure/ Holiday Visitors	2010	2011	2012	2013	2014	2015	Change 15/14	Trend
UK	250,680	245,940	241,130	233,650	239,980	251,230	4.7%	
Ireland	4,440	4,100	3,760	3,130	2,870	2,560	-10.8%	
Other CI	16,340	18,850	20,090	20,710	21,980	21,370	-2.8%	
France	36,510	40,050	36,760	37,510	39,010	36,380	-6.7%	
Germany	10,680	13,090	13,850	14,170	14,980	13,730	-8.3%	
Norway	580	730	1,160	880	720	1,130	56.9%	
Sweden	460	500	430	590	1,120	1,110	-0.9%	
Netherlands	3,550	3,290	2,520	2,370	2,920	3,000	2.7%	
Belgium	1,520	1,450	1,450	1,280	1,350	1,150	-14.8%	
Switzerland	1,900	2,220	2,250	2,790	2,440	2,180	-10.7%	
Finland	220	210	170	150	150	770	413.3%	
Denmark	450	520	290	320	1,520	1,190	-21.7%	
Austria	410	870	1,240	1,400	1,470	2,230	51.7%	
Spain	360	480	310	290	330	420	27.3%	
Portugal	220	160	250	200	170	170	0.0%	
Italy	340	340	260	280	310	280	-9.7%	
Canada	670	650	860	740	800	730	-8.8%	
USA	1,340	1,210	1,120	1,090	1,120	1,320	17.9%	
Australia	1,110	1,300	1,540	1,540	1,560	1,610	3.2%	
Other Markets	3,730	3,720	3,780	2,670	2,950	4,390	48.8%	
Total Staying Leisure[1]	335,520	339,690	333,210	325,750	337,750	346,950	2.7%	
Visiting Friends and Relatives[2]	99,780	101,740	100,570	99,830	102,220	106,710	4.4%	
Language Students[3]	2,950	3,200	3,350	3,480	3,730	3,220	-13.7%	
Business Visitors[4]	99,720	103,830	109,830	112,690	112,980	118,070	4.5%	
Conference Delegates[5]	9,220	9,330	6,330	5,960	3,080	3,100	0.6%	
Visiting Yachtsmen[6]	23,230	23,420	20,520	19,850	19,780	18,700	-5.5%	
Leisure Daytrippers[7]	101,250	103,250	101,230	101,340	109,260	108,350	-0.8%	
Other Visitors[8]	18,380	15,420	13,260	13,030	12,630	12,530	-0.8%	
Total Visitors	**690,050**	**699,880**	**688,300**	**681,930**	**701,430**	**717,630**	**2.3%**	

1 Staying leisure visitors are based upon returns of visitor registration cards and the 2009 and 2012 Travel Surveys and refer to those staying in paid accommodation.
2 VFR estimates refer to those staying with friends and relatives, and not those who stay in paid accommodation. The estimates are based upon the 2009 and 2012 Travel Surveys.
3 Language student numbers are based upon declarations from language schools.
4 Business visitor estimates are based upon returns of visitor registration cards and the 2009 and 2012 Travel Surveys.
5 Conference figures are based upon returns by the hotels active in the Conference, Meetings and Incentives market prior to 2015, as well as visitor registration cards in 2015.
6 Visiting yacht figures are supplied by the Ports of Jersey.
7 Leisure day trips are estimated from the results of the 2009 and 2012 Travel Surveys.
8 'Other' may refer to business or leisure visits (e.g. specific events, deliveries, visiting bands, weddings, funerals, educational trips etc.).
The 2009 and 2012 Travel Surveys had a tighter definition of "Other" than previous Exit Surveys, with many respondents being reclassified as leisure or business visitors.

Visitors to Jersey contributed £243m to the local economy in visitor expenditure during 2015, a 4.7% jump on the year before thanks to an increase in visits and an increase in the average amount spent per visitor.

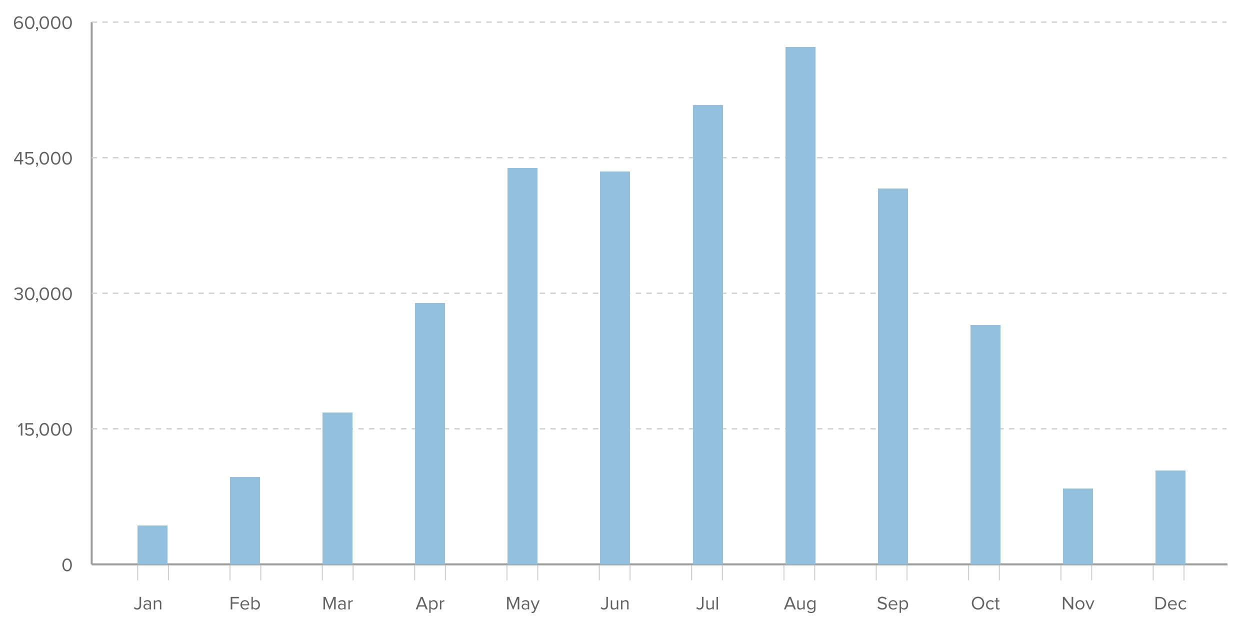
Staying Holiday/ Leisure Visitors	2014		2015		2015 vs. 2014	
	Spend per Visitor	Value of Market £000's	Spend per Visitor	Value of Market £000's	% Change Spend per Visitor	% Change Value of Market
UK	£502	£120,500	£504	£126,521	0%	5%
Ireland	£456	£1,309	£442	£1,132	-3%	-14%
Other C.I.	£251	£5,528	£275	£5,868	10%	6%
France	£281	£10,973	£289	£10,502	3%	-4%
Germany	£802	£12,008	£793	£10,893	-1%	-9%
Benelux	£474	£2,025	£460	£1,909	-3%	-6%
Other	£720	£10,550	£763	£13,370	6%	27%
Staying Leisure Total [1]	£482	£162,893	£491	£170,194	1.9%	4.5%
Visiting friends/relatives [1]	£229	£23,442	£231	£24,657	1%	5%
Language students [2]	£953	£3,554	£919	£2,959	-4%	-17%
Daytrippers - French	£45	£3,117	£45	£3,163	0%	1%
Daytrippers - UK	£46	£375	£46	£369	0%	-2%
Daytrippers - Other C.I.	£86	£1,574	£85	£1,438	-1%	-9%
Daytrippers - Other	£36	£479	£36	£486	0%	1%
Daytrippers - Total [1]	£51	£5,544	£50	£5,457	-2%	-2%
Visiting yachtsmen [3]	£109	£2,160	£109	£2,036	0%	-6%
Business - Day visitors	£87	£3,816	£88	£3,894	1%	2%
Business - Staying visitors	£358	£24,779	£378	£27,778	6%	12%
Business visitors - Total [1]	£253	£28,595	£268	£31,673	6%	11%
Conference delegates [4]	£373	£1,149	£426	£1,318	14%	15%
Other - Day visitors	£51	£294	£51	£298	0%	1%
Other - Staying visitors	£634	£4,352	£640	£4,283	1%	-2%
Other visitors - Total [1]	£368	£4,645	£366	£4,581	-1%	-1%
Total Visitors	**£331**	**£231,982**	**£338**	**£242,874**	**2.1%**	**4.7%**

[1] Expenditure is calculated by using results from the 2012 Jersey Travel Survey. 2014 and 2015 estimates have been updated based on Jersey's September RPI.
[2] Expenditure is estimated based upon local tuition fees and estimated additional on-Island spend.
[3] Expenditure is calculated by using results from the 2012 Visiting Yachts Survey. 2014 and 2015 estimates have been updated based on Jersey's September RPI.
[4] Expenditure is calculated by using results from the 2012 Jersey Travel Survey, Jersey's September RPI and previous research into conference delegate rates.

N.B. 2014 figures in the above table have not been reflated to 2015 prices.

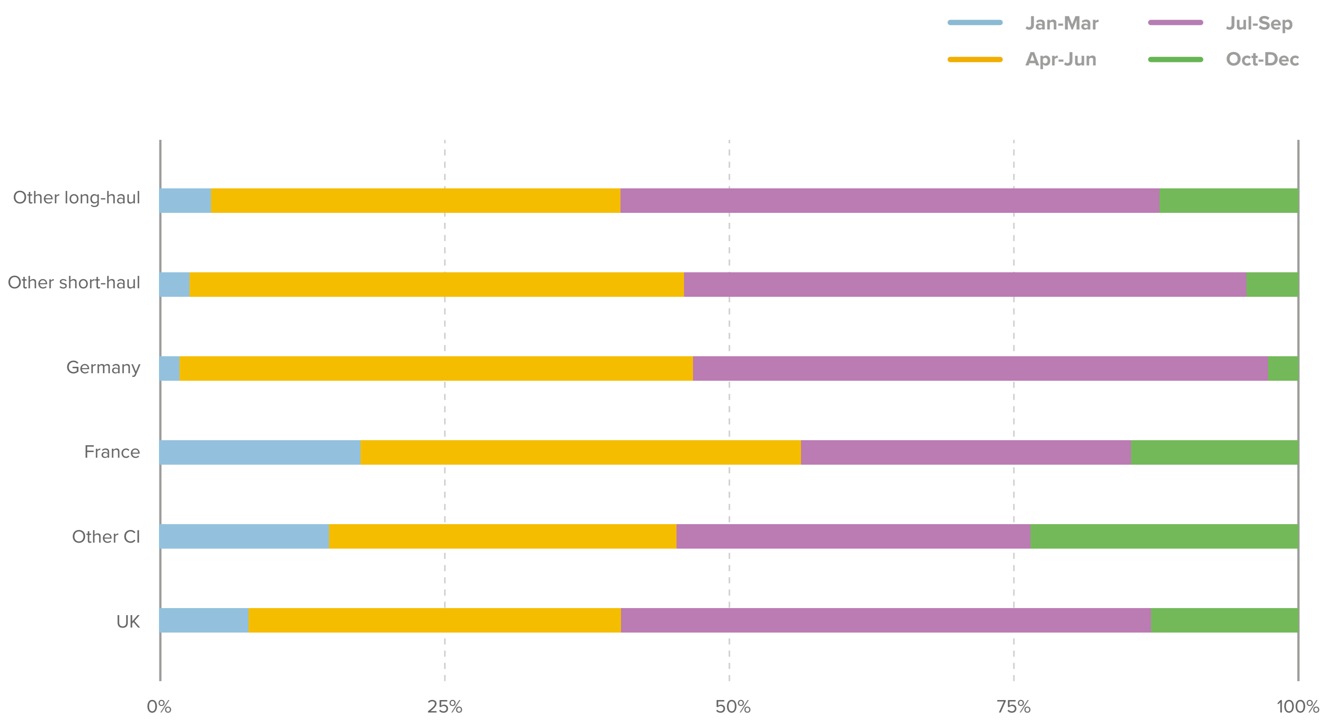
Monthly Profile of Staying Leisure Visits in 2015

Staying Leisure Visits continue to be highly seasonal with just 2% of visits during the quietest winter months but 17% in the peak month of August.



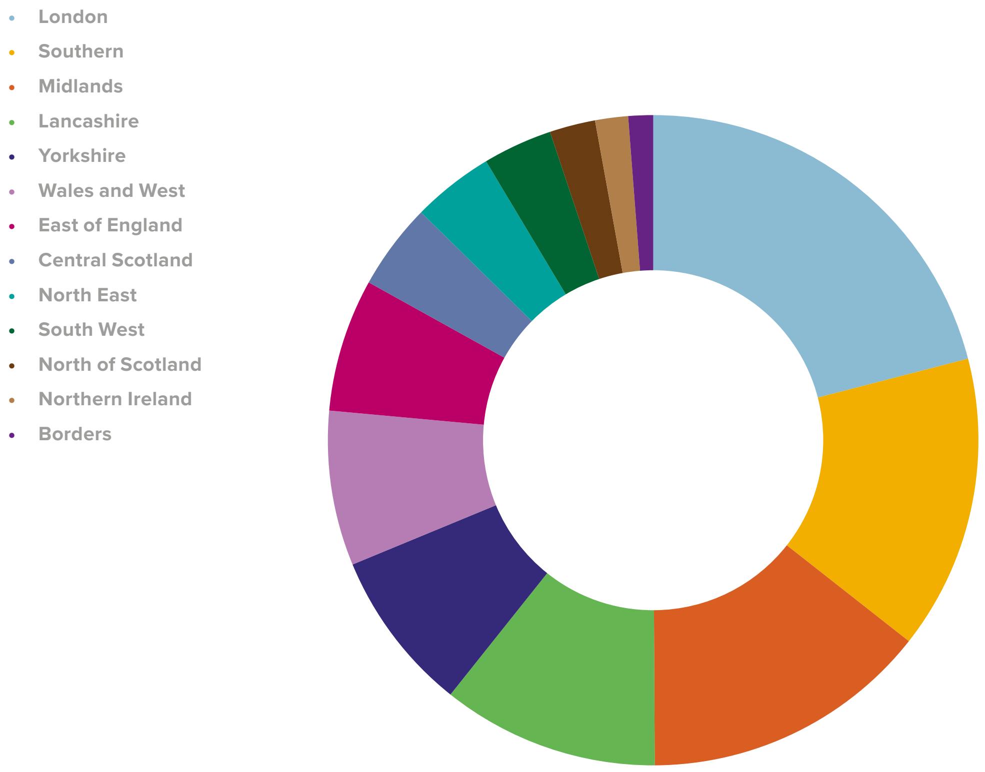
Seasonality of Staying Leisure Visits by Market

The only markets to see more than a fraction of visits outside of the period April to September are the UK, France and Other Channel Islands, but even here two-thirds or more of visits take place during the main season.



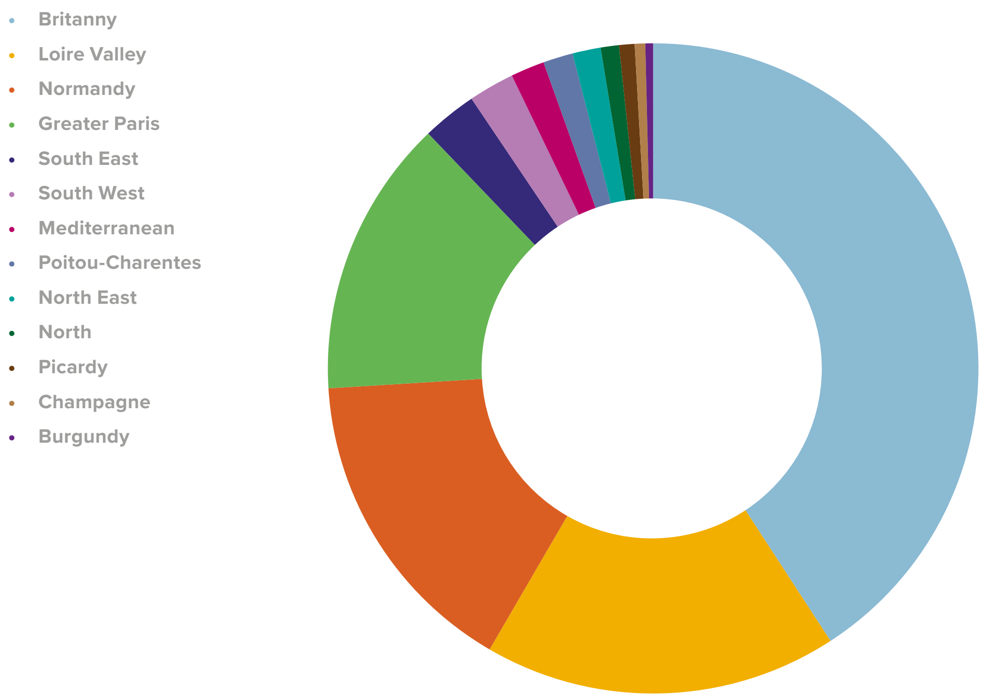
Where Staying Leisure UK Visitors Live

Half of all staying leisure visitors from the UK live in the London, the South of England or the Midlands.



Where Staying Leisure French Visitors Live

A significant proportion of staying leisure visitors from France live in the Brittany region, and once visitors from Loire Valley, Normandy and Greater Paris are added in more than 90% of French staying leisure visitors are accounted for.

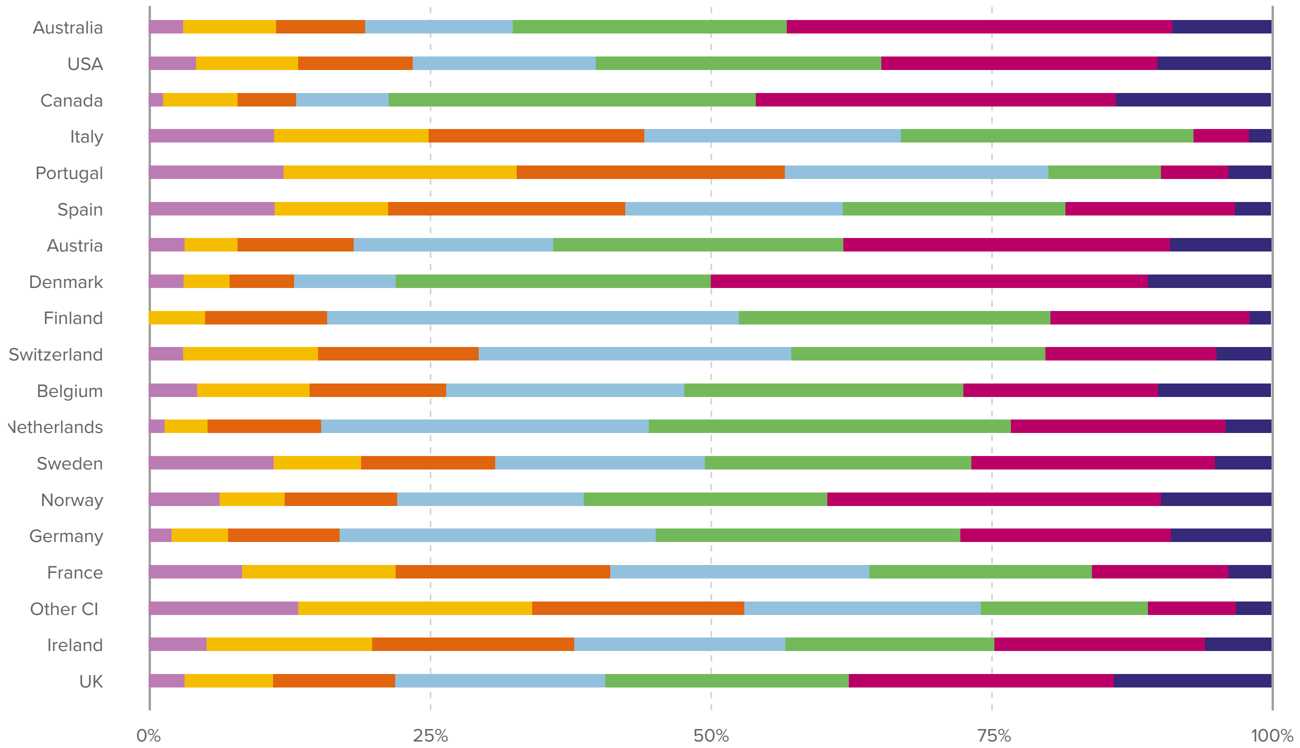


Length of stay and Average Stay for Staying Leisure Visitors

The typical staying leisure visit lasted just more than four nights during 2015, but there was variation by market, with those from France and Other Channel Islands staying on average just two nights whereas Germans, Danes and Swedes were typically on the island for around six nights.

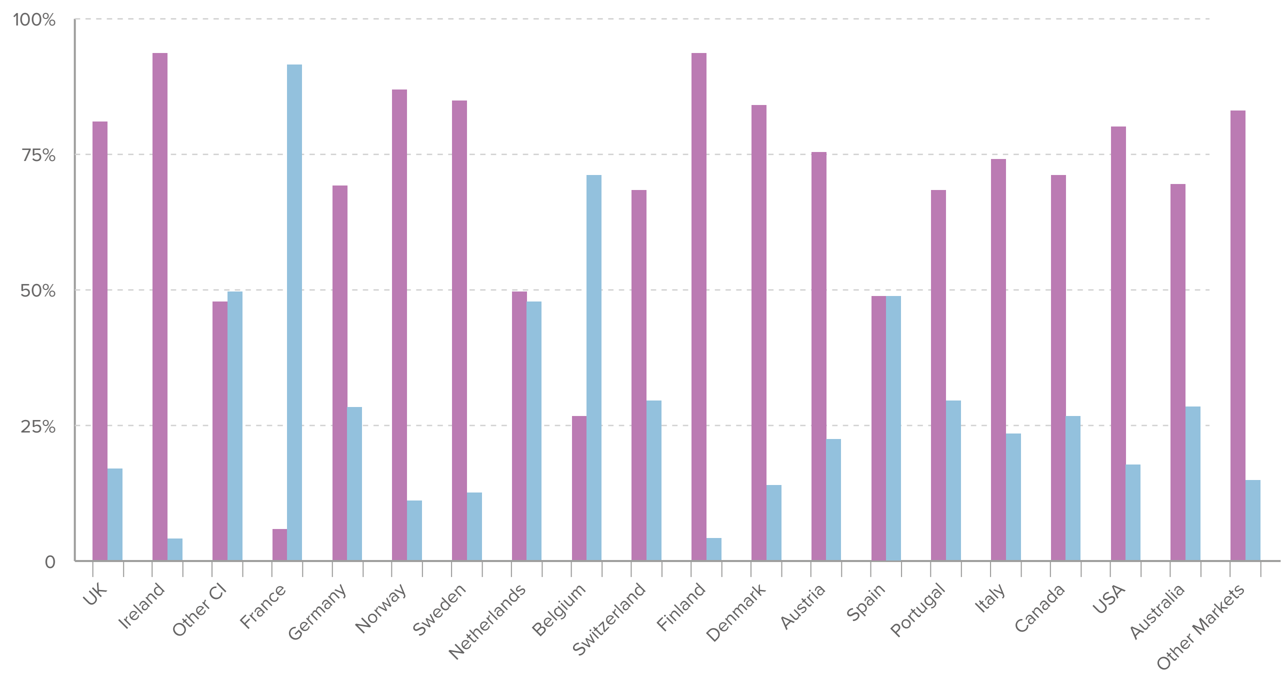
	2010	2011	2012	2013	2014	2015
UK	4.7	4.8	4.7	4.7	4.6	4.6
Ireland	5	5	4.9	4.8	4.6	4.4
Other CI	1.9	1.9	1.9	1.9	1.9	2.1
France	2.1	2.1	2.1	2	2	2.1
Germany	5.9	5.9	6.2	6.1	6	5.9
Norway	4.7	4.5	5.7	5.1	4.1	5.1
Sweden	4.8	6.7	3.7	4.4	4.7	5.5
Netherlands	4.9	4.9	4.8	4.4	4.4	4.2
Belgium	3.7	3.7	3.9	3.7	3.8	3.6
Switzerland	4.9	4.9	4.9	4.8	4.8	4.9
Finland	3.8	4.2	3.8	3.8	3.8	5
Denmark	4	3.7	4.6	3.9	5.7	6.1
Austria	4.9	4.7	4.1	4.5	4.5	3.9
Spain	3.9	4	3.9	4.4	4.2	5.2
Portugal	3.6	5	4.9	5	4.4	3.9
Italy	3.5	4	4	4.1	3.6	4.5
Canada	4.4	4.7	5	5	4.6	4.4
USA	3.1	3.7	3.6	3.4	3.6	3.4
Australia	4	3.8	3.7	3.7	3.7	3.7
Other Markets	3.7	4	3.8	4.2	4.2	4.9
TOTAL	4.3	4.3	4.3	4.3	4.2	4.2

A key characteristic of staying leisure visitors from a number of markets is that the older cohorts constitute a very significant proportion, with Other Channel Islands somewhat bucking this trend with one-third of visitors being aged 34 or younger.



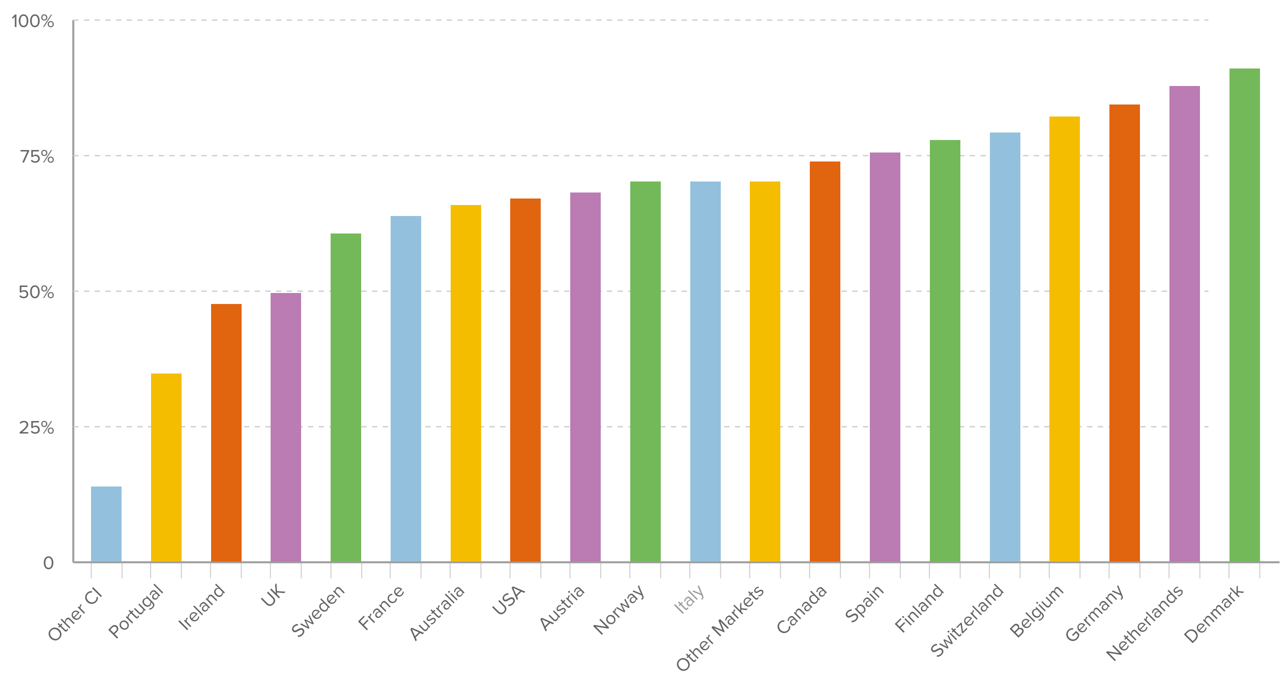
Mode of Travel of Staying Leisure Visitors

Overall 72% of Staying Leisure Visitors travel by Air and 28% by Sea. However, there is some variation by market, with visitors from France and Belgium far more likely to travel by Sea than by Air.



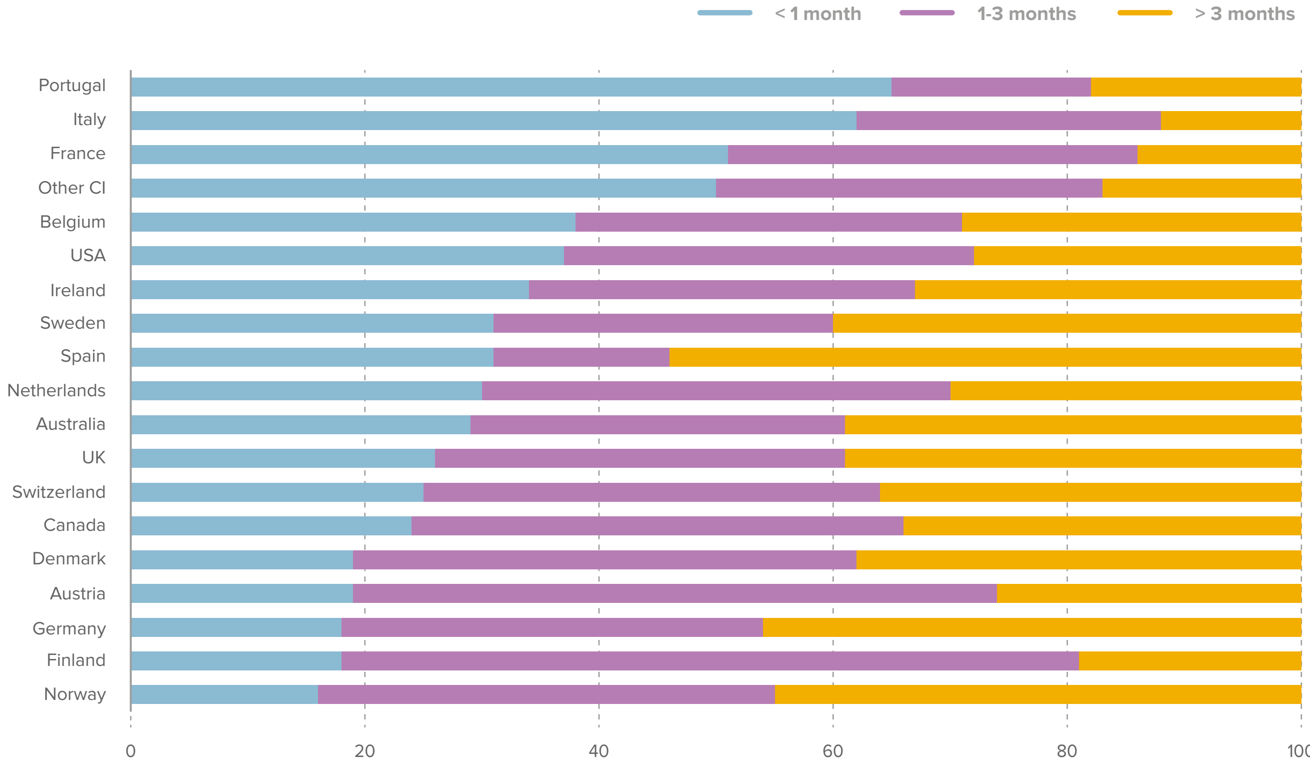
Proportion of 'First-Time' Staying Leisure Visitors

While it is rare for a staying leisure visitor from Other Channel Islands or Portugal to be making their first trip to the island slightly less than half of UK staying leisure visitors are first-timers.



Booking lead-time

The only sizeable markets to see significant numbers booking their trip less than one month in advance are France and Other Channel Islands, whereas there is a strong chance that Germans and Scandinavians will book three or more months in advance.



Staying Leisure Visitors who Book Accommodation Directly with Establishment

The proportion of staying leisure visitors who book their accommodation directly with the establishment has been declining over recent years to stand at 37% in 2015.

	2011	2012	2013	2014	2015
UK	45%	42%	40%	39%	37%
Ireland	55%	52%	46%	47%	48%
Other CI	55%	52%	48%	51%	50%
France	35%	33%	32%	32%	32%
Germany	32%	27%	29%	28%	29%
Norway	49%	20%	18%	16%	15%
Sweden	42%	35%	22%	21%	13%
Netherlands	43%	41%	42%	40%	36%
Belgium	40%	36%	32%	27%	30%
Switzerland	35%	39%	38%	43%	36%
Finland	29%	33%	28%	25%	29%
Denmark	61%	50%	42%	23%	26%
Austria	33%	23%	22%	18%	17%
Spain	49%	59%	62%	53%	41%
Portugal	76%	77%	80%	80%	82%
Italy	68%	70%	68%	68%	50%
Canada	42%	44%	43%	39%	39%
USA	60%	58%	62%	58%	55%
Australia	54%	52%	46%	44%	40%
Other Markets	59%	50%	55%	53%	46%
TOTAL	45%	41%	39%	39%	37%

There has been a negligible 4% decline in the number of bedspaces available over the course of the past five years, although there has been growth in the number of bedspaces to be found in both Youth Hostels and Self-Catering establishments.

Accommodation Establishments by Category 2011 – 2015

	2011	2012	2013	2014	2015
Hotels	68	67	67	68	65
Guest Houses	44	43	42	38	37
Self-Catering	25	25	26	26	29
Campsites	4	3	4	5	5
Youth Hostel	2	2	2	2	2
Total	**143**	**140**	**141**	**139**	**138**

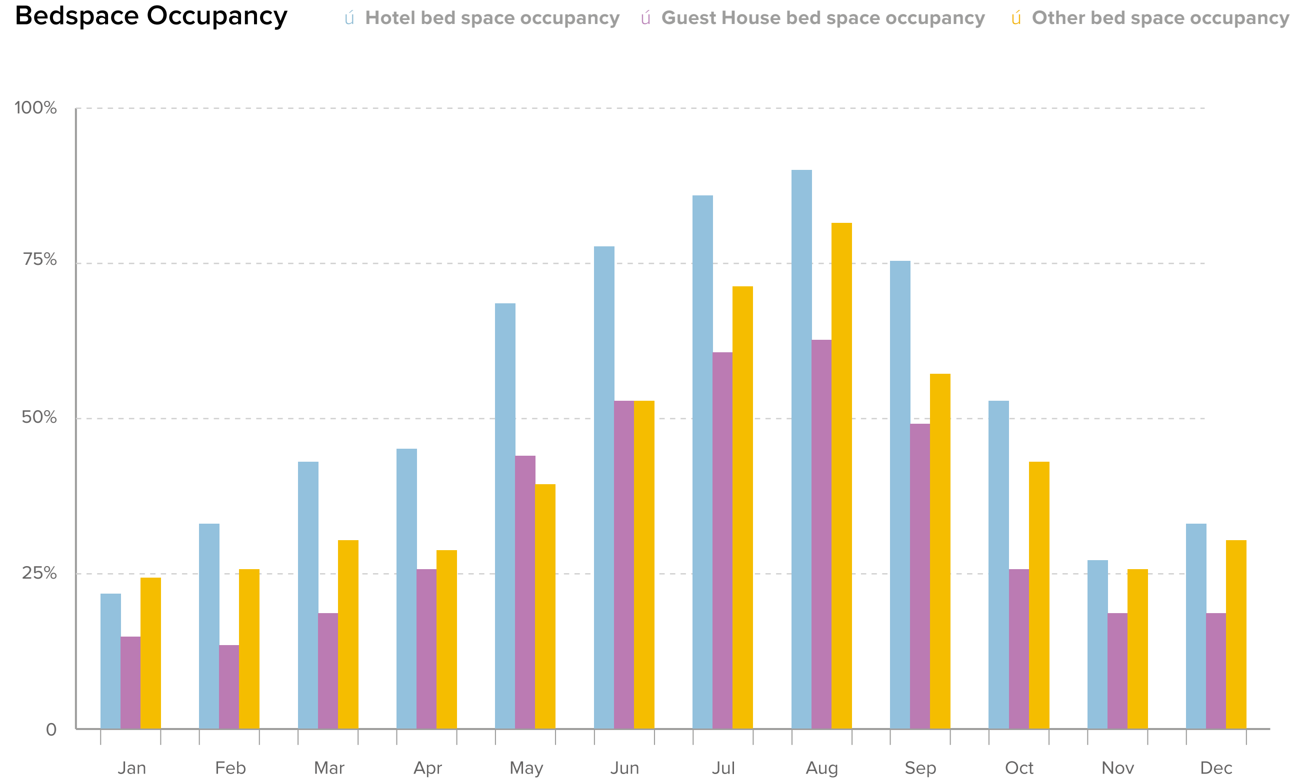
Accommodation Bed Spaces by Category 2011 – 2015

	2011	2012	2013	2014	2015
Hotels	9,189	9,089	8,976	8,695	8,522
Guest Houses	1,055	1,011	977	924	881
Self-Catering	870	928	983	998	1,145
Campsites	762	612	636	786	786
Youth Hostel	80	139	151	151	146
Total	**11,956**	**11,779**	**11,723**	**11,554**	**11,480**

N.B. Self-catering attached to hotels/guest houses appear within the hotel/guest house totals. Figures may not agree with previous figures due to being measured at a different time of the year.

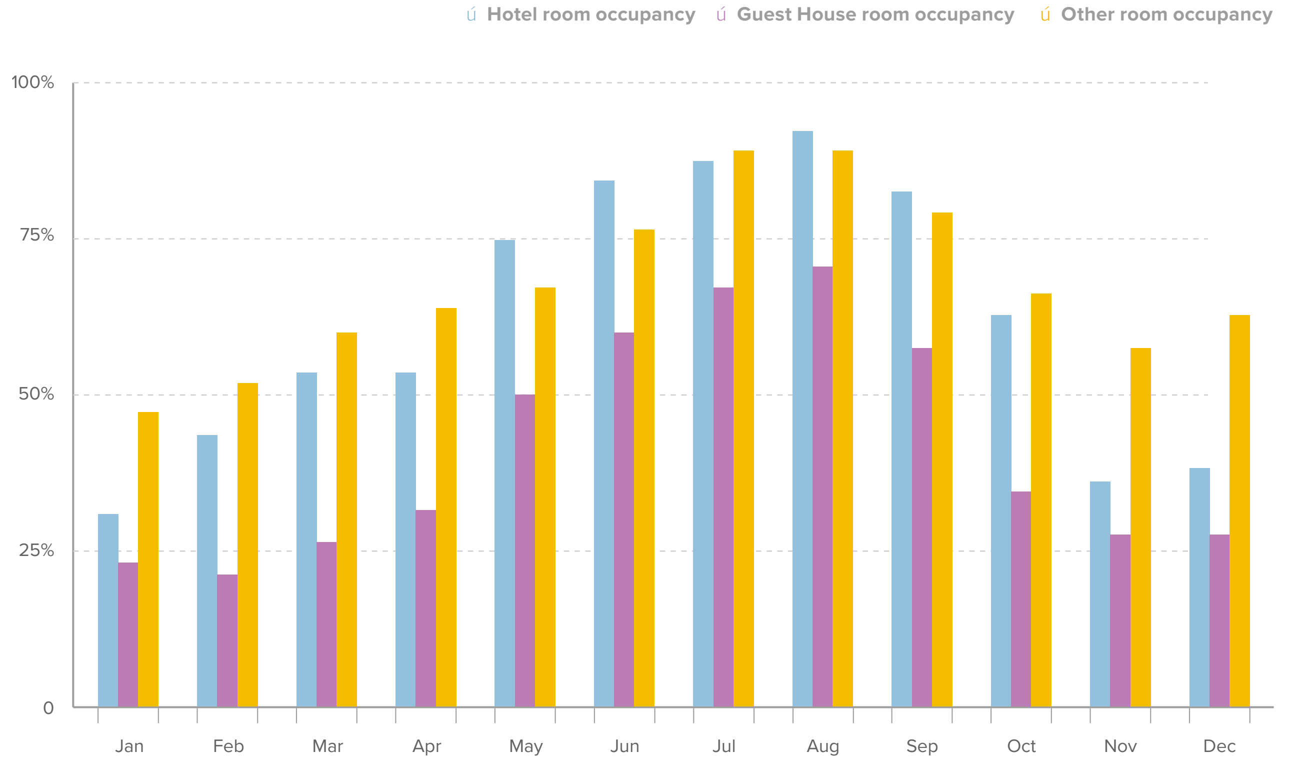
The highest levels of bedspace occupancy tends to be achieved in the period June through to September, with hotel bedspace occupancy of 87% in August. Bedspace occupancy tends to be only around 30% during the quietest months of the year.

Bedspace Occupancy



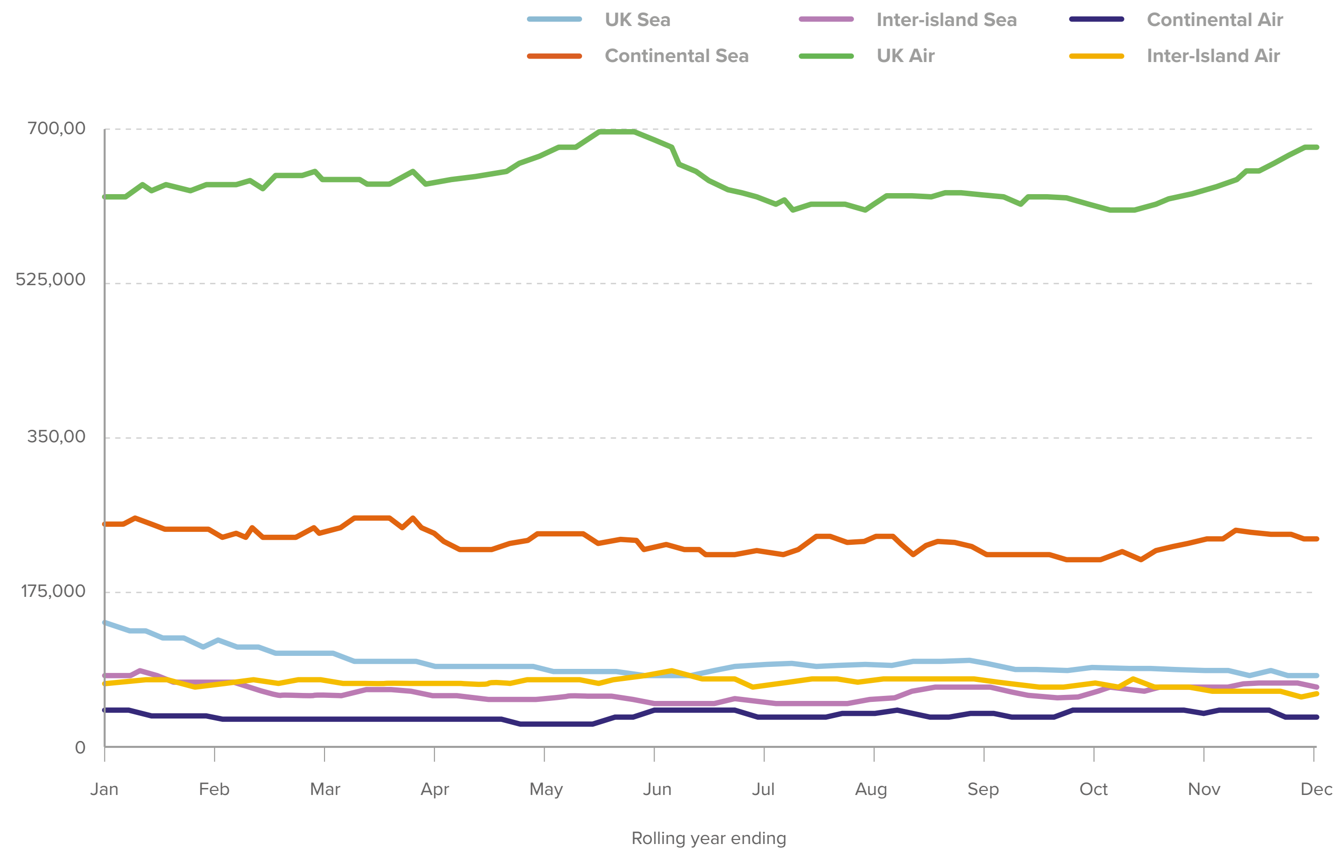
Room Occupancy

Room occupancy tends to be a little higher than bedspace occupancy, with this particularly true for Self-Catering forms of accommodation.



Passenger Arrivals

Reflecting both arriving visitors and returning residents figures from the Ports of Jersey indicate that there has been sustained growth in arrivals from the UK by Air, whereas the reverse is true for arrivals from the UK by Sea.



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