

# Visit Jersey Limited 2017 Business Plan Summary

#### **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.

The ambition is to welcome 1 million visitors spending £500 million by 2030. The Jersey Destination Plan, published in October 2015, sets out our island's tourism ambition to 2020. This Plan covers 2017.

### **Visit Jersey Priorities**

- 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 and productivity

### **Performance & Measurement**

## In 2017 VJ will partner with our industry to achieve:

Key Performance Indicators	2020 Target	2019 Target	2018 Target	2017 Target	2016 Target	2015 Actual	2014 Actual	2013 Actual
Gross Value Added for hospitality sector *	Benchmark+ x%	Benchmark+ x%	Benchmark+ x%	Benchmark + x%	Benchmark available early 2017	3.7% £153m	3.8% £149m	3.77% £138m
Productivity Added by hospitality sector **	30	29	29	29	28	28	27	26
Total visitors	800,000 (+2.2%)	782,700 (+2.2%)	765,700 (+2.2%)	749,100 (+2.2%)	732,900 (+2%)	718,000	701,430	681,900
Visitor spend- nominal (2.49% pa 2015-20)	£310m	£294m	£281m	£267m	£255m	£243m	£232m	£230m
Staying leisure visitors total	389,000	380,000	372,000	361,000	352,000	347,000	337,000	325,800
First time holiday visitor	50%	50%	49%	49%	48%	48%	48%	48%
Island RevPAR***	Benchmark+ x%	Benchmark+ x%	Benchmark+ x%	Benchmark + x%	Benchmark available early 2017	na	na	na
Average bed occupancy- August	89%	88%	88%	88%	86%	90%	85%	79%
Net promoter score of visitors	+2%	+2%	+2%	Base + 2%	Benchmark available early 2017	na	na	na

\*GVA GVA of "hotels, restaurants & bars". We do not know the "true" number by means of international benchmarks.

Tourism's impact is more than just economic. Research in 2016 will help improve our understanding of tourism's impact

\*\* Productivity

\*\*\* Island RevPAR:

Hotels, restaurants & bars- GVA per Full Time Equivalent in constant year (2013) values of income; £ thousand revenue per available room; a performance metric in the

revenue per available room is an accepted measure of revenue per available room; a performance metric in the hotel industry that is calculated by dividing a hotel's total guestroom revenue by the room count and the number of days in the

period being measured

### In 2017 VJ will deliver:

Visit Jersey Targets	What do we measure	Expected Results		
Brand Performance	Brand sentiment towards attributes	• 2016 Benchmark+ 2%		
Marketing Performance	Return on investment of 5:1	<ul> <li>ROI on marketing spend</li> <li>76,000 incremental visits</li> <li>267,000 incremental bed nights</li> </ul>		
Activity Performance	<ul><li>Visitor traffic</li><li>Data captured</li><li>Content engagement</li></ul>	<ul> <li>Unique visitor traffic: 1.5 million visitors</li> <li>Data capture: +40,000 names</li> <li>Social audience: +100,000</li> </ul>		
Trade Conversion (including Events Jersey)	<ul><li>Industry referral leads generated</li><li>industry satisfaction</li></ul>	<ul> <li>Partner referrals: 133,000</li> <li>Partner satisfaction survey: 2016 benchmark +2%</li> </ul>		

# **Target Segments**

### UK

Retain 1	Retain 2		
• 55+	• 25-54		
Retired / working	Working		
2+ holidays a year	1+ holidays a year		
3-6+ month lead time	3-6+ month lead time		
Package driven	Package driven		
60 miles from departure points	60 miles from departure point		
ABC1	ABC1C2		
Convert 1	Convert 2		
• 25-54	• 25-54		
No children	Children		
2+ holidays a year	2+ holidays a year		
4-6-week lead time	4-6-week lead time		
Working	Working		
Independent traveller	Independent traveller		
60 miles from departure points	60 miles from departure points		
ABC1	ABC1		

### **France**

Day-tripper	Short stay
• 25-54 (or groups)	• 25-54
Children	<ul> <li>no Children</li> </ul>
2+ holidays a year	• 2+ holidays a year
Holidaying in the region	<ul> <li>West/North West France</li> </ul>
Working	<ul> <li>Working</li> </ul>
Independent traveller	<ul> <li>Independent traveller</li> </ul>
ABC1	ABC1

**German speaking countries** 

Retain & Grow		Convert		
•	55+	•	25-54	
•	Retired / working	•	no Children	
•	2+ holidays a year	•	2+ holidays a year	
•	3-6+ month lead time	•	60 miles from departure points	
•	Package driven	•	Working	
•	60 miles from departure points	•	Independent traveller	
•	ABC1	•	ABC1	

#### **Other Countries**

Scandinavia potentially offers growth opportunities. In 2017 VJ will work with the Ports of Jersey and suppliers to bring interested parties together to better understand the nature of potential demand and ensure Jersey's Scandinavia proposition is clearly defined and consistently presented. Elsewhere VJ will retain a mostly "watching brief".

#### VJ's Contribution

Tourism is central to government's plans to stimulate economic growth, sustain and create jobs and provide some balance to Jersey's economy. The States Enterprise Strategy priorities are:

Enterprise Strategy Priority 1 - Improve the productivity of existing businesses

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

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

VJ, in partnership with Jersey Business, Locate Jersey and Digital jersey, has agreed a collaborative approach and VJ's key role is to develop the visitor economy.

VJ is the marketing body for the Island as a destination. But we are more than this; our research and analysis will better inform our partners and better support their marketing efforts. We will attract private sector investment; both cash and marketing-in-kind to extend the marketing of Jersey. These partnerships can also deliver economies of scale which will reduce the costs for our partners and save public money. Our efforts also help sustain and build a sense of place. This can buttress the work of other external facing States organisations by helping make Jersey a better place to visit, do business with, study in and locate to. We have individual plans for:

- Research
- Product development
- Business visits and events
- Market development
- Marketing
- Visitor information servicing

#### In 2017 VJ will:

- Continue to roll out #theislandbreak Jersey brand
- Promote Jersey as an all year holiday destination
- Work with industry partners, government and their agencies, to develop the Jersey product, increase productivity and attract incremental growth in visitor numbers and spend
- o Provide leadership for business visits and events-led tourism
- o Ensure the successful Introduction of a new What's On guide and Map
- Raise the profile of tourism; provide insights and leadership for the industry on policy matters
- Champion the Economic Impact Study
- o Support businesses raise their productivity and improve performance

# 2017 Budget

Total Grant	£5,100,000
Total Staff Costs	£995,000
Research & intelligence	£360,000
Product	£220,000
Marketing	£2,360,000
Trade Development incl. co-operatives	£550,000
Tourist Information Centre	£250,000
Events Jersey	£200,000
Total Premises Costs	£55,000
Total Administrative Expenses	£110,000
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Operating Expenses	£5,100,000
NID	

NB

- i) Total income of £5.1m is £4.9m VJ grant, £0.2m Events Jersey grant
- ii) Total staff costs include executive team remuneration and board members' fees
- iii) Marketing spend is net of partners' financial contributions

# **Organisational Structure**

