

A tourism and hospitality industry manifesto for
growth and competitiveness towards 2030

Jersey Destination Plan

Tourism is Everyone's Business

www.jersey.com



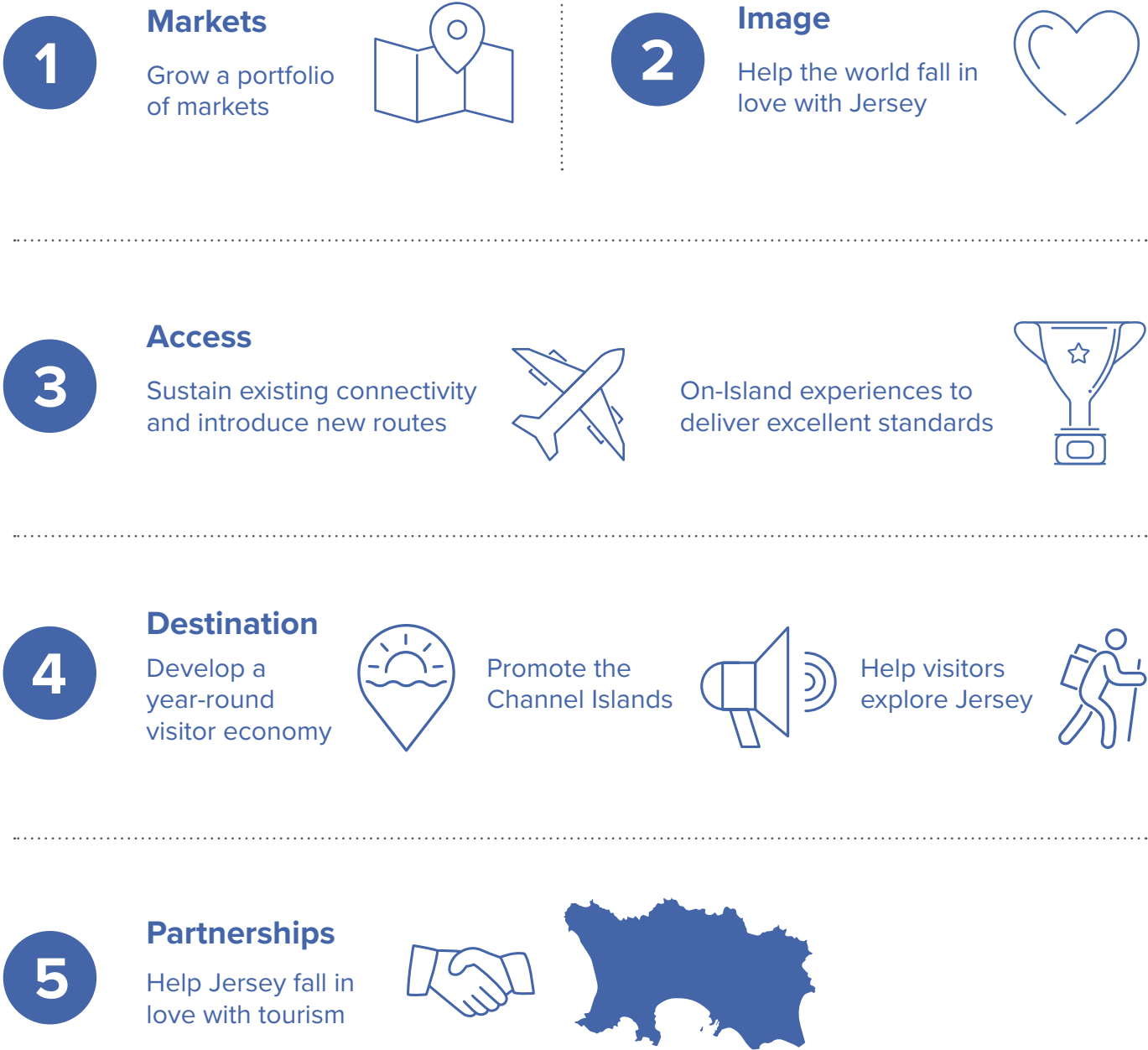
A place to be proud of



2030 performance indicators



Priorities



Tourism is everyone's business

Foreword

“We must continue to work hard to keep Jersey front of mind.”

Since the publication of the first Jersey Destination Plan in 2015 we have seen the decline in visitor numbers and spend reversed. Tourism and hospitality account for over 8% of our economic activity and therefore the tourism industry makes a significant contribution to the Jersey economy; jobs, export earnings and taxes all benefit from a healthy and sustainable hospitality and tourism economy - the visitor economy. The visitor economy also provides many other important benefits to our community not measured in GVA and GDP statistics through its contribution to transport routes, cultural activities, choice of restaurants; the list of these non-economic benefits goes on and on.

The Government of Jersey funds Visit Jersey and its policies create the conditions for growth. But a healthy visitor economy cannot be taken for granted. Tourism is a fiercely competitive industry; visitors have plenty of holiday destination choices. We must continue to work hard to keep Jersey front of mind and our businesses commercially successful.

This refreshed plan confirms we need an all-embracing Government-industry approach. Visit Jersey can boost interest in and demand for Jersey and help our industry partners create and communicate great experiences for our visitors, and the Government can support Jersey's tourism industry with a policy framework that protects all that is wonderful about our island and encourages productivity and sustainable competitive advantage for our businesses and island. I believe Jersey's visitor economy is on a pathway to sustainable growth and improved productivity creating wealth, jobs and providing diversity. Working together, we can and will realise Jersey's full tourism potential for the benefit of all.

Kevin Keen
Chair Visit Jersey

In Autumn 2015 Visit Jersey published the Jersey Destination Plan setting out an ambition for the Jersey visitor economy. In the Autumn of 2018 we consulted widely with stakeholders in the tourism and hospitality industry. This updated Jersey Destination Plan reflects the views shared. It confirms our shared ambition, our shared priorities and sets out recommendations to support growth in Jersey's visitor economy.

This Plan is about helping ensure Jersey's tourism sector remains productive and competitive, our businesses successful and increasing numbers of visitors departing Jersey having had great experiences contributing to our island's economy. Working together across the public and private sectors, we can realise Jersey's tourism potential and grow our visitor economy to the benefit of visitors and residents alike.

Keith Beecham
CEO Visit Jersey

“Our competitors are moving fast and we want to go further and faster.”

I welcome this Plan. We are privileged to live in Jersey but Jersey must work hard to respond to the challenges of the future. Across the world countries are working hard to deliver growth and jobs. Our competitors are moving fast and we want to go further and faster. Ministers announced, in October 2018, five strategic priorities where Government will focus its efforts over the next four-year term of office. Our visitor economy directly plays a key role in helping us create a sustainable, vibrant economy and skilled local workforce for the future, and helps protect and value our environment. Jersey is characterised by a community that supports each other, cares for our island, can be dynamic and welcomes our visitors.

I and my colleagues in the States Assembly are working hard to create a strategic framework that supports all in Jersey to reach their potential. The tourism sector, made up of so many businesses, contributes to our island's prosperity and complements other sectors. Our shops, our restaurants, our heritage and our natural environment enhance the quality of life for residents. The sector also supports our inward investment aims. Tourism is good for Jersey and during this term of office we look forward to doing as much as we can to help ensure Jersey is a great place to visit, work and live.

Senator John Le Fondré
Chief Minister

“This new Plan confirms the vital role tourism plays.”

We have started the hard work to rebuild our tourism economy. The first Jersey Destination Plan set out a joint ambition for us all. This new Plan confirms the vital role tourism plays in the life of Jersey's economy. It's a vital industry that brings growth and benefits to our island community. I and my government colleagues and officers recognise the sector's importance. This Plan sets out a shared agenda to grow our visitor economy and improve productivity of the sector. I encourage you to read this document and join the public-private partnership that's helping put our island's visitor economy on a sustainable growth path enriching our island.

Senator Lyndon Farnham
Minister for Economic Development, Tourism, Sport and Culture

Government Priorities

Tourism helps make Jersey a better place to live, work, play, do business with and visit.

In the autumn of 2018, the Council of Ministers agreed a set of strategic priorities for their four-year term of office.

The Proposed Common Strategic Policy 2018 - 2022 sets out ministers' high-level ambitions for Jersey and contains five strategic priorities. The visitor economy contributes so much more than economic returns for Jersey as the table below illustrates.

Council of Ministers strategic priorities	How the visitor economy contributes to Government's priorities
Put children first	<ul style="list-style-type: none">Sporting events inspire children to enjoy a healthy lifestyle, e.g. Kids Fun Run at the start of the Super League Triathlon, Children's reading events during Festival of Words - all help with children's mental health and wellbeing
Improve Islanders' wellbeing and mental and physical health	<ul style="list-style-type: none">Supports mental wellbeing of citizens who participate in activities and spectate at sports events (alongside visitors)Visitors represent around 60% of all passenger movements thereby supporting routes to allow residents to enjoy travel as part of a healthy lifestyle. Connected by sea from two UK ports, three French ports and from Guernsey and Sark; 23 UK airports, and DublinTourists spend on and support Jersey's culture - Jersey Opera House, Arts Centre, museums, castles and galleries, Zoo as well as supporting major community events like Battle of FlowersTourism fosters a sense of place - citizens feel proud of their island
Create a sustainable, vibrant economy and skilled local workforce for the future	<ul style="list-style-type: none">Tourism spending supported 8.3% of GVA and 12.6% of all employment in Jersey (Tourism Economics 2017 report)Tourism provides diversity to our economy and is synergistic with financial services and other key sectors thereby increasing sustainability. There are also opportunities for productivity improvement by reducing seasonality
Reduce income inequality and improve the standard of living	<ul style="list-style-type: none">Helps with social inclusion - tourism jobs across all salary levels for all ages with excellent career growth opportunitiesVisitors explore and spend in all 12 parishes. 23% of holiday visitors go to the North East of the Island (Jersey Zoo), 16% head to Gorey in the East and a similar proportion to Jersey Pearl in the North West
Protect and value our environment	<ul style="list-style-type: none">Tourism helps our rural economy and respects landscapes. Visitors help sustain the livelihoods of Jersey's farmers and fishermen and value our natural beautyTourism supports and helps sustain Jersey's heritage such as Durrell and Jersey Heritage

This Plan is a crucial document. It confirms a destination leadership role for Visit Jersey working in partnership to deliver for our visitors, tourism businesses, government

and our island community. This is a long-term Plan whose purpose is to support Government's strategic imperatives working together with industry for our common good.

Where are we?

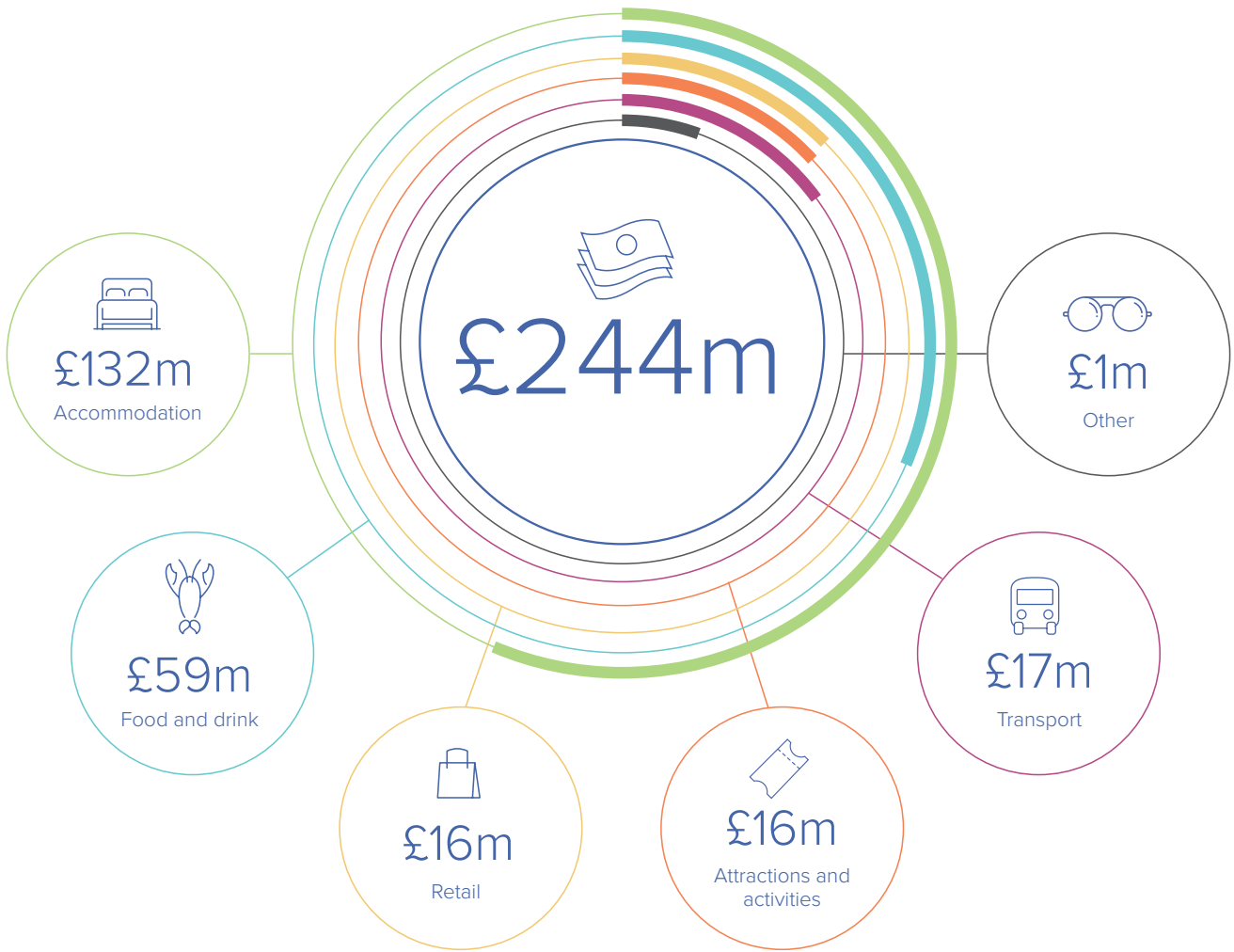
Following the establishment of Visit Jersey in the Spring of 2015 a Jersey Destination Plan (JDP) framed the opportunities that could be pursued to generate enhanced growth in the tourism sector.

This refreshed Jersey Destination plan is both a progress report since 2015 and a statement of ambition for the future. Over the last three years good progress has been made against many of the 21 recommendations. A summary of progress can be viewed at: <https://business.jersey.com/jersey-destination-plan>

According to the 2017 States of Jersey Measuring Jersey's Economy Report, hotels, restaurants and bars delivered £183m Gross Value Added (GVA); 4.2% of the Island's total.

This significantly undercounts the contribution tourism makes to Jersey's economy since swathes of the tourism industry such as attractions, cultural venues, transport and retail are not included. Tourism Economics' "The Economic Contribution of Tourism to Jersey" report published in May 2017 calculated the total impact of tourism was equivalent to 8.3% of GVA including induced impacts through the supply chain.

What visitors spent in 2017 in Jersey



Demand Factors



Jersey welcomed 705,000 visitors during 2017. These visitors generated £244m worth of on-island spending, equivalent to £2,300 per island resident.

Although growth has been below the trendline set out in the 2015 Plan, Jersey has recorded growth; 1% growth in visitor numbers, 5% growth in spend and an impressive 24% increase in Overnight Holiday Visitors. Growth is not likely to be straight-line as circumstances do vary over time such as changing routes, hotel closing, openings, etc. We posit that growth has been curtailed because since 2014 there was a decline in sea travel options from the UK due to the move from two to one high-speed ship, inter-island day-trip market deterioration due to timetabling concerns and the removal of competition on inter-island flights which lead to a reduction in supply and increase in fares. Another possible hindrance identified by Kubi Kalloo (Triggers and Barriers research 2017) is that in relative terms Jersey is expensive to get to for UK residents compared with ‘sun and beach’ destinations and is not yet well enough established as a ‘short-break’ destination

to compete with city-oriented destinations. Further, accommodation in Jersey is generally more expensive (STR monthly benchmarking reports) than in the UK; for instance, the average nightly room rate in the South West of England in summer 2018 was £55 lower than in Jersey.

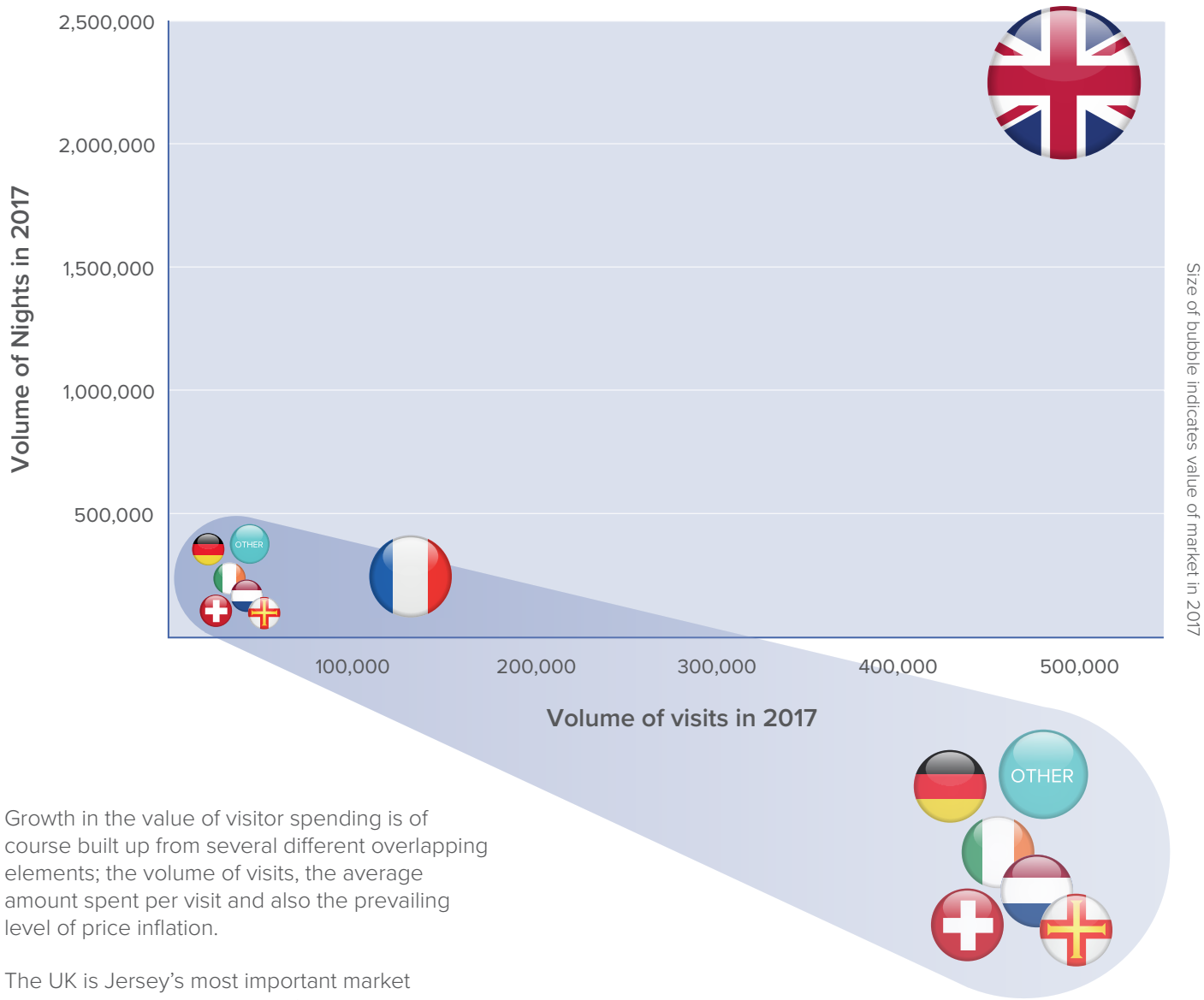
A notable success over the last three years is growth in overnight holiday visitors. Even though the methodology changed (from Registration Cards to Exit Survey) we can be confident that increased numbers of overnight holidaymakers are choosing to visit Jersey. This segment of the inbound market is where Visit Jersey concentrates our marketing efforts. We have more ability to influence this type of travel than most others.

If we accept the historic growth seen in demand for outbound travel from our principle source markets of Britain and Europe will continue there is compelling evidence that, from a demand-side perspective, achieving one million visits spending £500m by 2030 is achievable.

“ There is compelling evidence that, from a demand-side perspective, achieving one million visits spending £500m by 2030 is achievable. ”

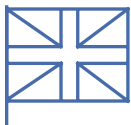
	2014	2017	% change 2014-2017
Jersey			
Total Visits to Jersey (000s)	701	705	1%
Overnight Holiday Visits to Jersey (000s)	338	418	24%
Holiday day-trips to Jersey (000s)	109	71	-34%
Total Visitor Spend in Jersey (£m)	232	244	5%
Passenger Arrivals at Jersey Airport and Jersey Harbour (000s)	1,134	1,138	0.3%
United Kingdom			
Inbound Holiday Visits (000s)	13,578	15,368	13%
Outbound Holiday Visits (000s)	38,519	46,480	21%
Domestic Overnight Holiday Trips (000s)	52,903	58,000	10%
Global			
Total International Tourist Arrivals (m)	1,137	1,323	16%

Value of markets in 2017



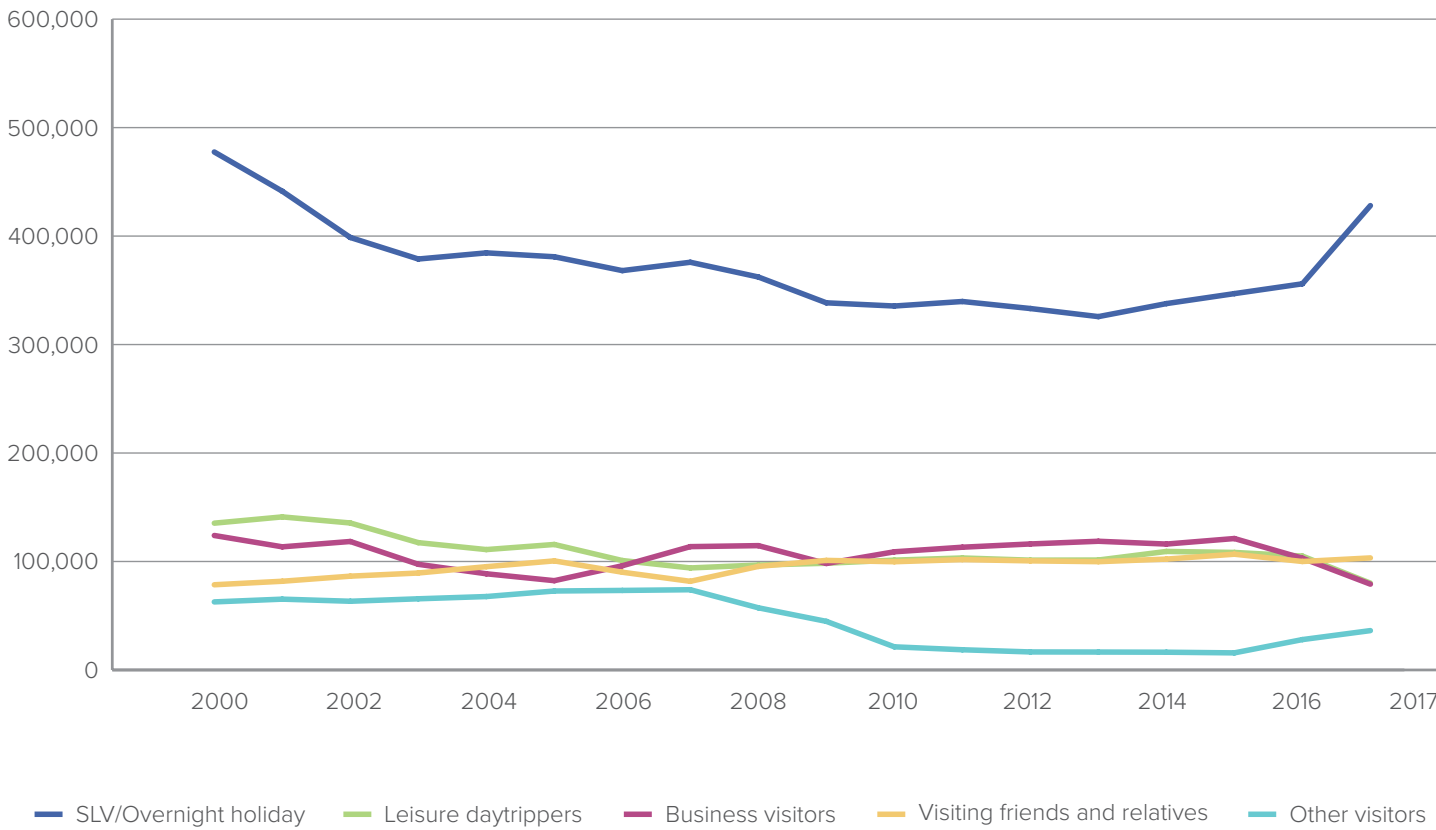
Growth in the value of visitor spending is of course built up from several different overlapping elements; the volume of visits, the average amount spent per visit and also the prevailing level of price inflation.

The UK is Jersey's most important market whether measured in terms of visits, visitor nights or visitor spending.



The UK is Jersey's most important market.

Trends by Journey Purpose



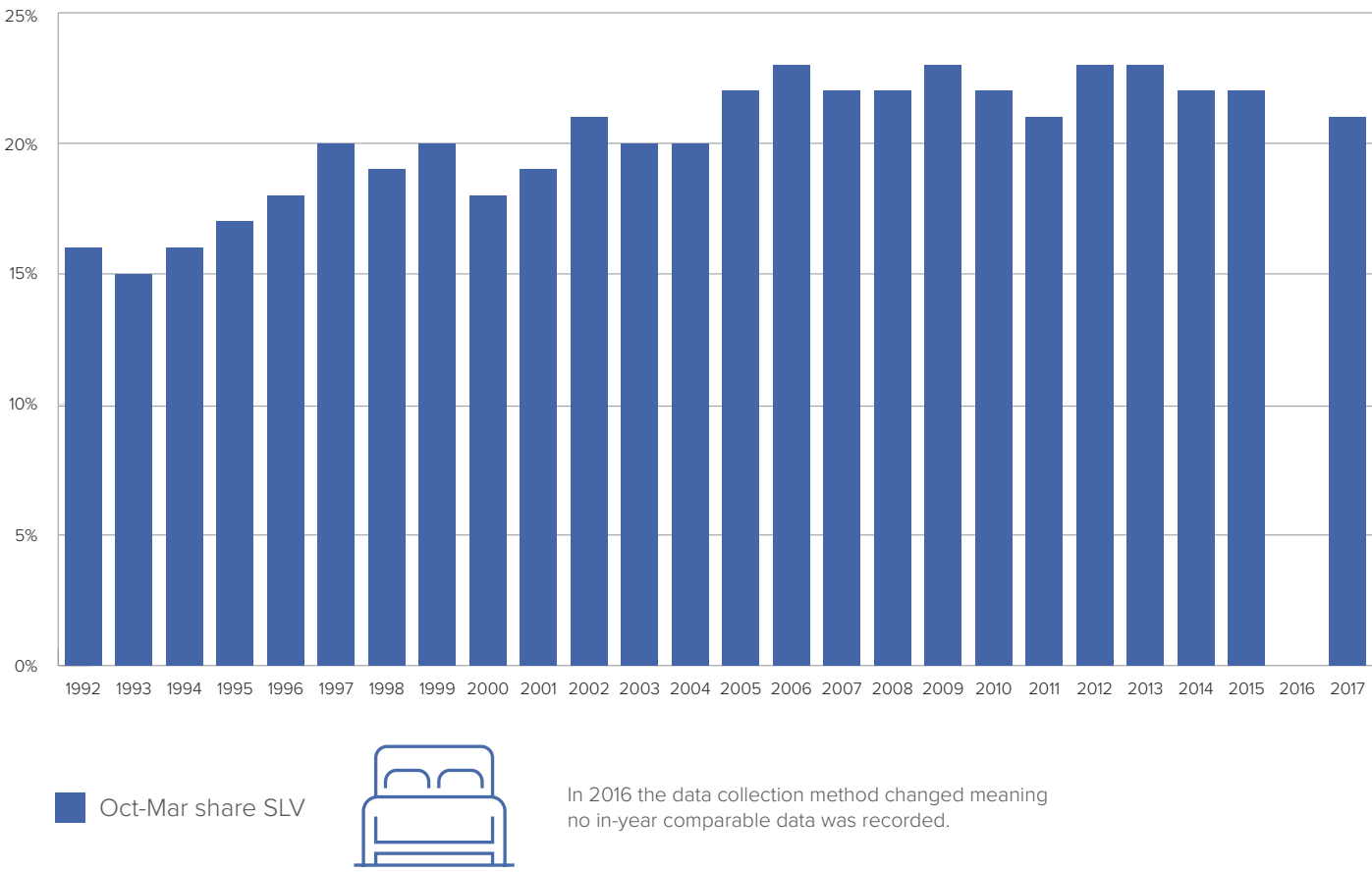
Staying Overnight Holiday Visits is the leading trip type. As can be seen from the above chart this segment witnessed the steepest decline over the past few decades until a recent upturn.

While eager to maintain current high volumes of visitation during summer months, the biggest opportunity to grow numbers and spend is perhaps in the shoulder months. The chart below illustrates that over time there has been a gradual rise in the share of overnight holiday visits that take place in the final and first quarter of the year.



Staying Overnight Holiday Visits is the leading trip type to Jersey.

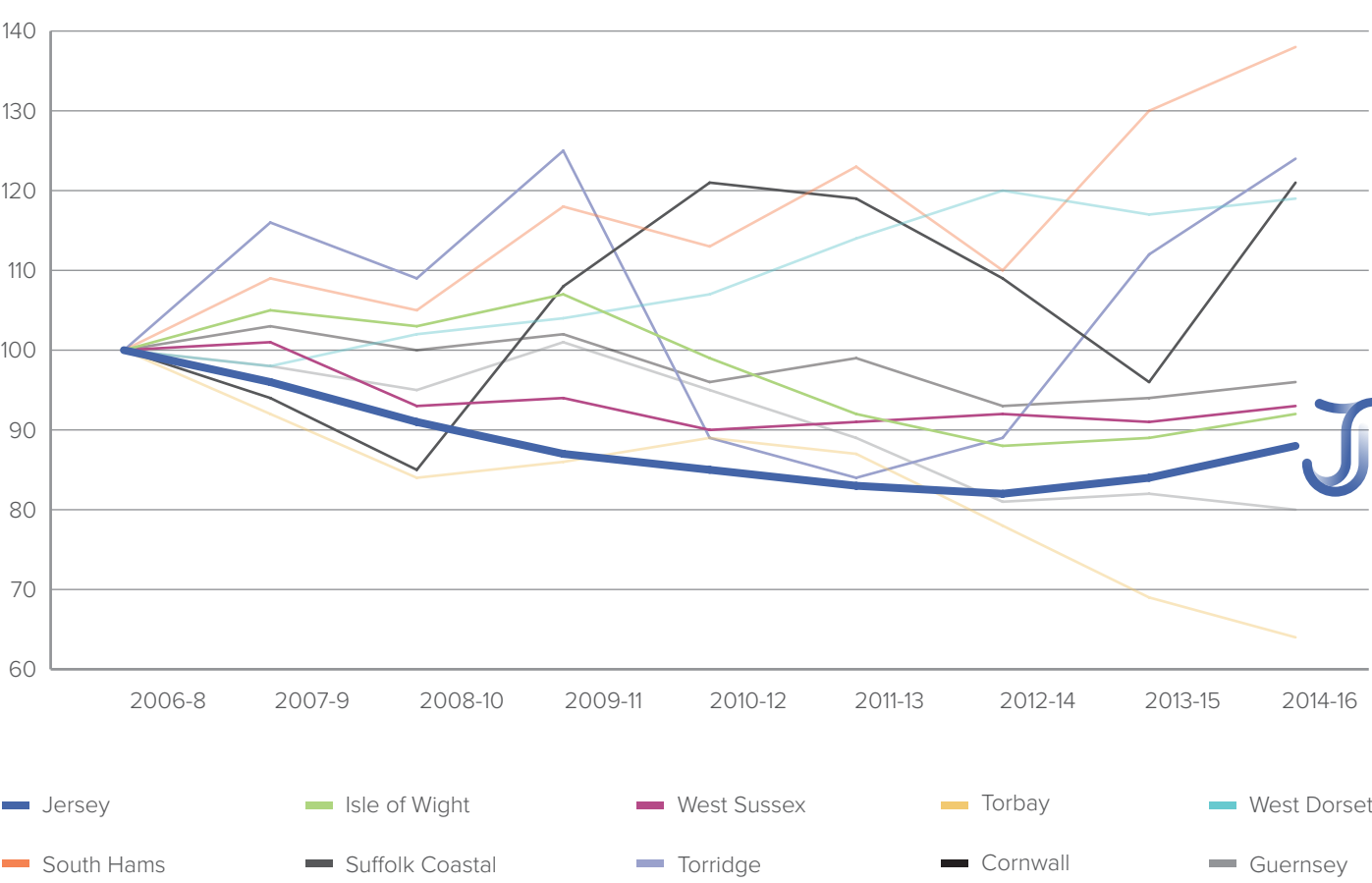
Seasonal Spread of SLV/Overnight holiday visits



Competition - Jersey’s relative position

Global international tourism is characterised by sustained long-term growth. Jersey has not matched this trend over the past two decades, and until recent years had not kept pace with growth in domestic holiday tourism to a number of areas within England as shown on the page opposite.

Destination of holiday visits by UK residents (2006-8 = 100)



The chart indicates that there has been a gradual uptick in Jersey’s performance in more recent years. This Jersey uptick was sustained in 2017 although data at the local level within England is not yet available to assess comparative performance.

Supply Factors

Lodgings

There has been a long-term reduction in accommodation establishments and beds. Between 1992 and 2017 Jersey witnessed the following decline in accommodation stock:

- number of establishments reduced by 65% from 393 to 132
- number of bed spaces available diminished by 56% from 24,770 to 10,790

2018 was different. Jersey has seen investment in its accommodation stock this year; a number of businesses investing multi-million pounds in their accommodation stock. The highlight is probably the opening of the island's first Premier Inn.

During 2018, we saw an increase in bed spaces of 292.

Figures from STR, the globally leading company that benchmarks hotel performance, indicate that Revenue per Available Room achieved across hotels in Jersey enrolled in benchmarking (close to 50% of Jersey's bedstock participates) stood at £71 in 2017. This is brought about through an Average Room Occupancy of 64.3% and an Average Daily Rate of £103.47. Occupancy varies dramatically across the year from a peak of 93.1% in July down to 33.9% in January.

Hotels account for 73% of all bed spaces on the island compared with 68% in 1992. Guest Houses now represent 7% of all bed spaces, down from 17% in 1992. There is also a growing Airbnb sector in Jersey. In November 2018 there were 145 properties on Airbnb showing for let in Jersey. This number increases significantly in summer.

There has been a reduction in the average number of nights per visit for holiday visits. The typical leisure visit:

- in 1992 lasted 6 nights
- in 2003 lasted 5 nights
- in 2017 lasted 4.7 nights

This trend is a worldwide one with people taking more shorter length trips compared to longer length trips.

Planes and Ships

The visitor economy's continued growth is tied intrinsically to inbound air and sea availability. The chart on the opposite page shows trends in the volume of passenger arrivals by air and sea over the longer term. These figures include both arriving visitors and returning residents.

Looking at the relative importance of visitors in relation to the total volume of passenger arrivals, in 2017, 58% of all those arriving at Jersey Harbour on a scheduled ferry were visitors to the island while at the airport 61% of all arriving passengers were estimated to be visitors.

Flights

There are many airports across the UK that enjoy direct access to Jersey. The table on page 14 reveals that the picture is an ever-changing one in terms of which carriers fly from which airports. While a number of routes operated by easyJet are seeing record volumes, other routes saw peak figures in previous years. The table also conveys information on the number of visitors and visitor nights accounted for by each route. This reveals that while some routes see a higher average length of stay than others, the aggregate amount of visits and visitor nights spent on the island is far larger from the year-round routes despite shorter stays.

Jersey also benefits from European charter flights. These flights appeal to Europeans looking for a hassle-free way of getting to Jersey. In summer, charter flights, typically operating back-to-back on Saturdays, bring week-long visitors thereby safeguarding healthy average length of stays. Typically, summer charters originate from Germany, Switzerland, Austria and The Netherlands. Many of the continental tour operators feature island-hopping and therefore feature both Jersey and Guernsey.

Ferries

The majority of sea arrivals to Jersey are from Continental Europe; over 215,000 in 2017. The number of sea arrivals has declined by more than a third since 2002. Despite this decline, ferries still remain important with 27% of all visitors arriving by scheduled ferry in 2017. 70% arrived by scheduled air (the remainder are visiting yachtsmen, cruise passengers and those travelling by private plane).

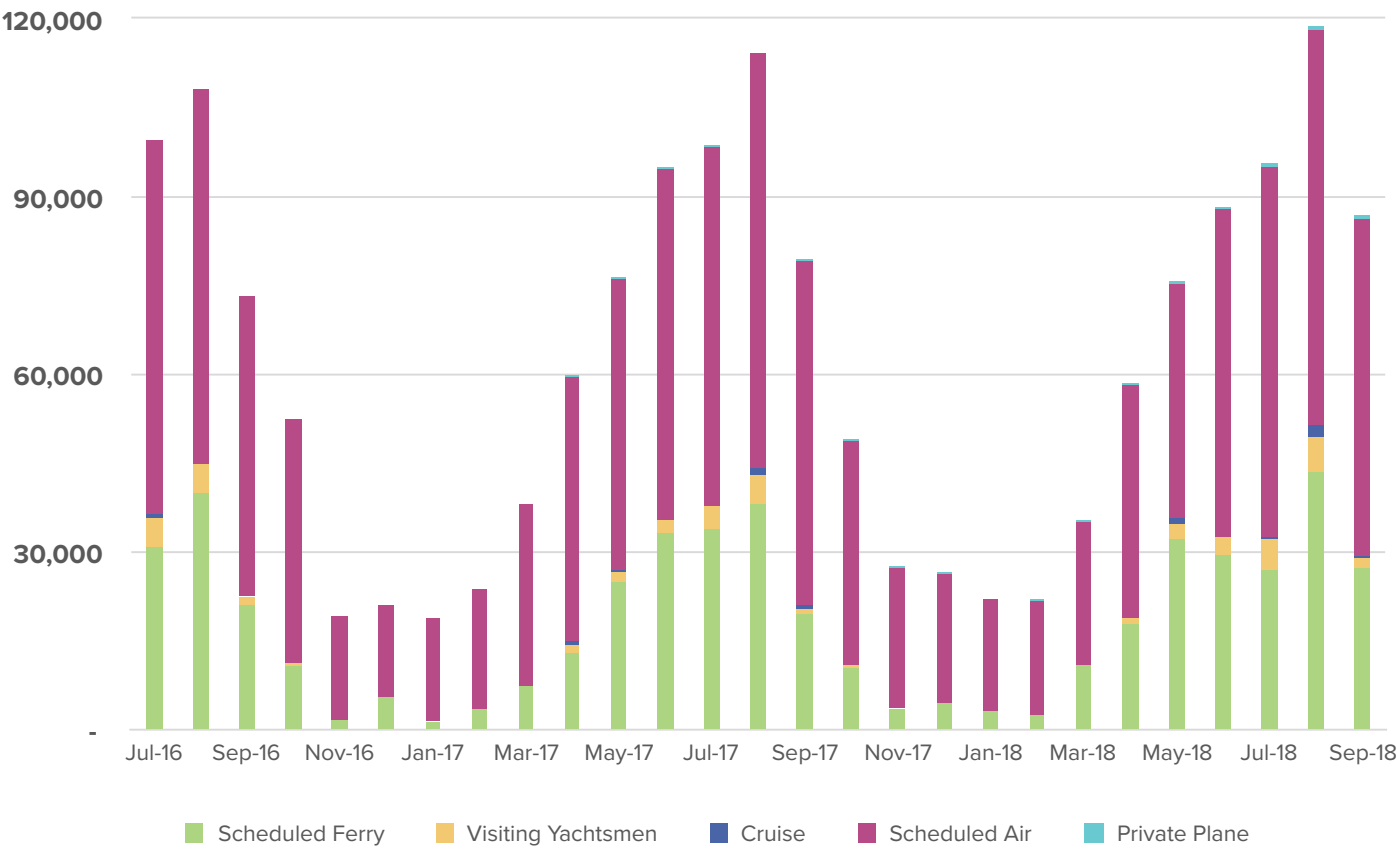


Regardless of the time of year, the bulk of visitors leave by air; six-in-ten visits in summer and nine-in-ten in the depths of winter are by plane.



In the busiest month of August the volume of visitors heading home after their island break is six times greater than in the quietest month of January.

Visitor Departures by Month and Mode



Passenger arrivals (arriving visitors and returning residents)

Origin airport	Current carrier(s)	Average annual change 2008-17	2017 total	Record total	2017 deficit from record	Record year	Notes
Aberdeen	Flybe	19	1,372	1,372	–	2017	Route supported by CITG
Belfast International	easyJet	875	10,126	10,126	–	2017	Flybe operated from Belfast City until 2013
Birmingham	Flybe	891	36,000	36,638	-638	2016	Some flights operate via GCI
Bournemouth	None	-392		9,398	-9,398	2015	Flybe withdrew route in 2015. Loganair reintroducing in 2019
Bristol	Blue Islands	-59	13,611	20,079	-6,468	2013	
Cardiff	Flybe	-401	8,106	12,536	-4,430	2009	
Coventry	None	-2,730		24,574	-24,574	2008	Thomson withdrew route in 2009
Doncaster Sheffield	Flybe	721	15,263	15,263	–	2017	
Dundee	None	-97		1,168	-1,168	2010	Flybe withdrew route in 2016
Durham Tees Valley	Flybe	-131	1,235	2,413	-1,178	2008	Route supported by CITG
East Midlands	Flybe	-1,117	18,010	30,565	-12,555	2009	
Edinburgh	easyJet/Flybe	-1,323	2,668	14,577	-11,909	2008	Easyjet launched March 2018
Exeter	Flybe	665	23,807	23,807	–	2017	Some flights operate via GCI
Glasgow	easyJet/Flybe	2,725	27,417	27,417	–	2017	
Humberside	Flybe	23	1,052	1,333	-281	2014	Route supported by CITG
Inverness	Flybe	112	1,008	1,010	-2	2015	Route supported by CITG
Isle of Man	None	-454		4,090	-4,090	2008	Blue Islands withdrew route in 2013
Leeds Bradford	Jet2.com	-80	6,747	10,333	-3,586	2012	
Liverpool	easyJet	4,113	64,024	64,024	–	2017	
London City	Blue Islands	1,380	18,160	21,598	-3,438	2015	
London Gatwick	BA/easyJet	7,837	328,382	328,382	–	2017	
London Heathrow	None	-4,102		36,917	-36,917	2008	BMI withdrew route in 2009
London Luton	easyJet	-402	23,762	27,381	-3,619	2008	
London Southend	easyJet	1,443	12,988	26,221	-13,233	2013	
London Stansted	None	-87		12,311	-12,311	2010	Aurigny withdrew route in 2014
Manchester	Flybe	-3,188	22,492	51,183	-28,691	2008	
Newcastle	easyJet	577	11,789	11,789	–	2017	
Norwich	Flybe/Loganair	-457	3,209	7,310	-4,110	2008	Flybe will not operate route in 2019
Oxford	None	-		2,676	-2,676	2012	Manx2.com withdrew route in 2013
Plymouth	None	-891		8,020	-8,020	2008	Eastern withdrew route in 2011
Southampton	Flybe/Blue Islands	1,562	84,197	86,675	-2,478	2015	

Exit Survey Data

Destination airport	2017 visits	2017 visitor nights	Nights per visit
Aberdeen	1,568	10,739	6.8
Belfast International	8,359	40,733	4.9
Birmingham	25,419	118,188	4.6
Bournemouth			
Bristol	8,348	42,469	5.1
Cardiff	5,996	31,147	5.2
Coventry			
Doncaster Sheffield	13,000	72,193	5.6
Dundee			
Durham Tees Valley	1,265	7,503	5.9
East Midlands	13,642	66,392	4.9
Edinburgh	2,450	14,999	6.1
Exeter	16,970	68,597	4.0
Glasgow	17,921	102,161	5.7
Humberside	1,149	7,967	6.9
Inverness	972	6,785	7.0
Isle of Man			
Leeds Bradford	6,115	39,717	6.5
Liverpool	39,675	188,670	4.8
London City	10,586	31,599	3.0
London Gatwick	167,904	711,864	4.2
London Heathrow			
London Luton	19,303	87,749	4.5
London Southend	11,238	57,258	5.1
London Stansted			
Manchester	14,457	71,093	4.9
Newcastle	10,825	61,904	5.7
Norwich	3,002	17,897	6.0
Oxford			
Plymouth			
Southampton	53,673	219,006	4.1



Gatwick has seen the fastest growth followed by Liverpool and then Glasgow



Some routes come close to an average of 7 nights, others such as London City see a much shorter length of stay



Routes operated solely by easyJet (Belfast International, Liverpool, London Luton, London Southend and Newcastle) account for 19.7% of all visits and 21.0% of visitor nights



The largest single route, Gatwick, flown by both British Airways and easyJet, accounts for 37% of all visits and 34% of all visitor nights

Where we want to go

Ambition, challenges & recommendations

The former JDP set out a bold ambition for a vibrant and sustainable Jersey tourism industry whose contribution to the economy and community at large is widely recognised and specifically to achieve:

- 1 million visitors before 2030
- Visitor spend of £500m per annum

This ambition of 1 million visitors spending £500m remains valid.

The UK is still due to leave the EU at the end of March 2019. This could have fundamental impacts in both the short and longer term on holiday-taking by those who live in the UK, and Jersey’s other important source markets of France and Germany. Brexit could also have wide-ranging impacts on the supply-side as well as on consumer demand.

If a broad agreement does emerge and there is no ‘cliff edge’ then an implementation period exists until the end of 2020, during which time little would change for how individuals and businesses go about their everyday activities. If a deal is brokered it is likely that one impact will be a strengthening in the value of sterling, potentially to around the €1.30 mark. A ‘deal’ would help lift consumer confidence and the higher value of sterling help to bring down inflation as imports become cheaper. On the downside, a strengthened pound and holidaymakers realising that there has been no calamitous change in the ease of travelling abroad would make euro-denominated destinations relatively more attractive (financially) than sterling-denominated jurisdictions such as Jersey.

If by spring of 2019 nothing has happened to extend Article 50, then a ‘no deal’, whether ‘managed’ or not, will likely lead to a sharp deterioration in consumer confidence, which has already started to emerge. This outcome would lead to a fall in the value of the pound, potentially to below parity with the euro. Even if planes are still able to fly and ships sail there could be considerable nervousness among Brits to book overseas holidays. The changed value of sterling would of course make staying somewhere where the pound was accepted a more affordable option than travelling to the eurozone. Another risk to a ‘no deal’ scenario is that businesses will see both an increase in the cost of goods and services they import, as well as potentially experiencing disruption to their supply chains.

While it is possible to see that Jersey might see an uplift in visitation in these circumstances, given the island’s primary source market is the UK, ultimately the UK entering a period of extreme economic vulnerability is unlikely to be positive for the longer-term performance of the economy.”

Our collective priority is to inspire visitors from overseas to choose, visit and explore Jersey and maximise commercial and public returns from our investments. Although the last few years has seen growth below the long-term trend, we have, for the first time in many years, grown in both spend and visitor numbers. The industry has worked hard over the recent past to address the decline; this effort is to be commended. Following stakeholder feedback, we posit that government, partners on and off Island, and Visit Jersey can cooperate to realise this ambition.

Regardless of the outcome of Brexit our collective priority is to inspire visitors from overseas to growth will not be a straight line. The future will not be without challenges. There are risks as well as opportunities that can influence the visitor number and spend trajectories over the next 12 years.

We have a stronger foundation today than in 2015 including successful marketing campaigns, a more collaborative approach and a broadening of visitor types.

Achieving the 2030 ambition is predicated on:

1. Visit Jersey delivering marketing improvements
2. Industry delivering marketing, product improvements, route development and competitiveness advancements
3. Government creating a policy framework conducive to long-term visitor economy growth

Businesses and government want industry to improve economic productivity; a measure used to indicate how well a country uses its human and physical resources to generate economic growth. Tourism Economics’ “The Economic Contribution of Tourism to Jersey” report (May 2017) calculated the total impact of tourism was equivalent to 8.3% of GVA and “more productive use of current resources would enable growth in visitor arrivals and spending and an economic boost”. Jersey’s visitor economy GVA at 8.3% is comparable with the UK’s at 11.2% and Bermuda at 9.3%. This hints that there is some scope for growth in the sector to increase productivity relative to labour inputs.

Resources are underutilised in shoulder seasons and a reduction in seasonality will boost sector efficiency. This will require focused marketing and events planning as well as ensuring reliable transportation infrastructure during these periods.

Reliable year-round air and sea access is a prerequisite for continued growth and visitation throughout the year. Growth in meetings, incentives, conferences, exhibitions (MICE) and events further provides opportunities to boost the sector’s productivity.

Further productivity improvements would arise from an increased focus on required tourism and hospitality skills among the resident population. The visitor economy provides employment across a range of skill levels.

Some stronger focus on training the resident population could help meet requirements and reduce the need for migrant workers. Other productivity opportunities for businesses centre around improved use of technology such as automation of repetitive tasks. Hospitality is all about human interactions but many chores will be increasingly handled by machines, some supported by Artificial Intelligence. Adopting a pro-technology posture will likely deliver long-term business benefits, particularly here in Jersey where labour is a scare resource.

The Key Performance Measures below gauge performance of the visitor economy and the recommendations that follow highlight actions, endorsed by industry, that will help us move towards our ambition.

Visitor Economy Key Performance Indicators

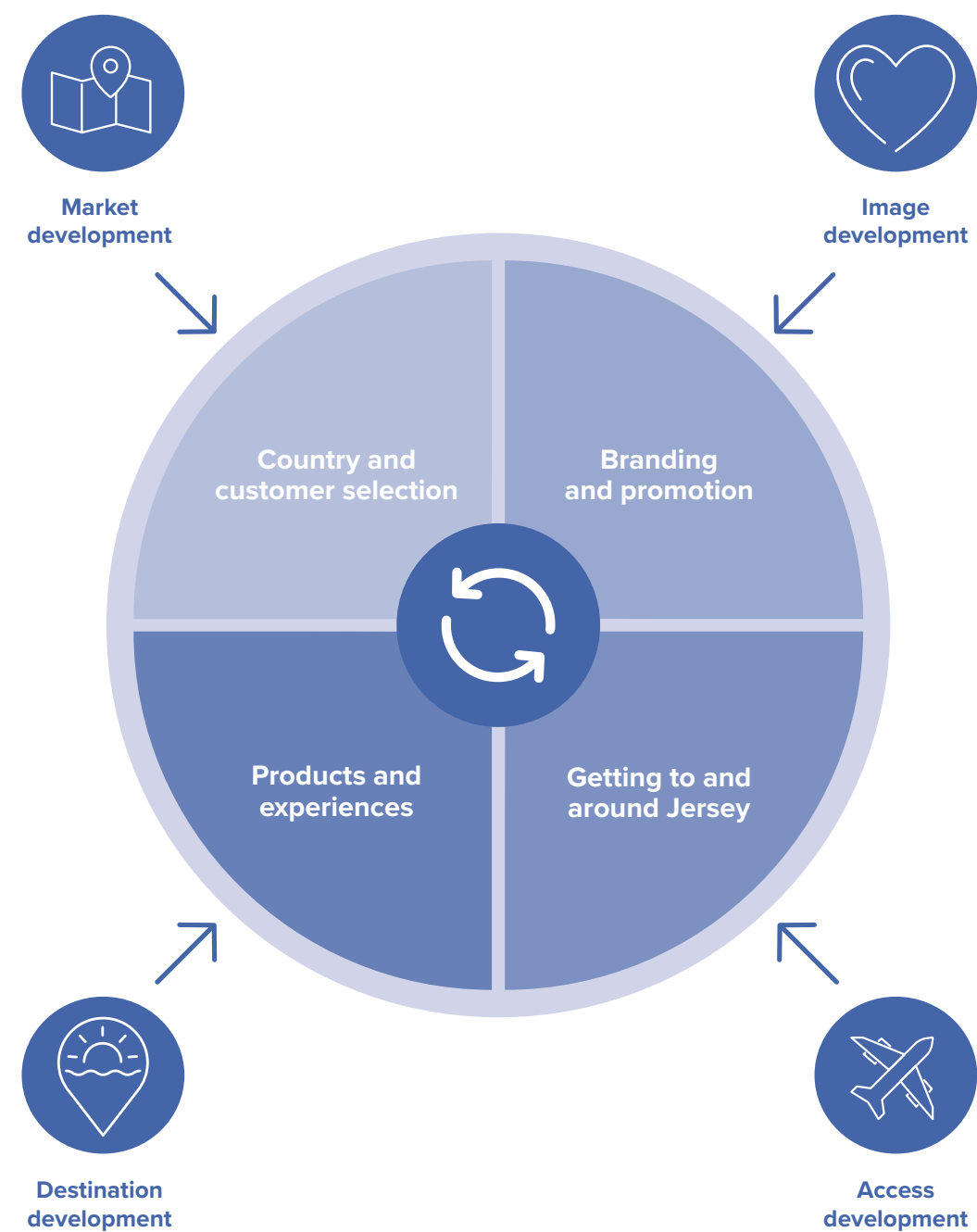
KPIs	2030	2020	2017 (actual)
Visitor Economy GVA*	8.7%	8.7%	8.3%
Total visitors	1m	748,000	705,000
Visitor spend-nominal	£500m	£265m	£244m
Overnight holiday visitors	600,000	438,000	418,000
Seasonal spread; Share of overnight holiday visits outside April to September	28%	23%	21%
Island RevPAR**	£85	£75	£71
Net promoter score of visitors	55	48	47

* Gross Value Added. This is a measure, calculated by Tourism Economics, that measures the total economic impact of Tourism. These numbers need to be treated with care. 8.7% of a bigger more productive economy is preferable to say 10% of an economy that is shrinking, as Jersey has been since 2000.

** Island RevPAR: a widely accepted measure of revenue per available room; a performance metric in the hotel industry that is calculated by dividing a hotel.

Recommendations

There are four drivers of tourism growth which will impact on our collective ability to achieve the 2030 ambition. Consultations with stakeholders confirmed that market, image, access and destination factors all contribute in growing the visitor economy.



Markets

Recommendation	Outcome/Success	Partners (together with Visit Jersey)
1 Grow a portfolio of markets that drives current opportunities and creates long-term growth in visits and spend		
<ul style="list-style-type: none">Current segments (nurture); UK and Europe group leisure segments	<ul style="list-style-type: none">Halt long-term decline in current overnight holiday visitors from UK and Europe	Tour Operators (TO), Jersey suppliers
<ul style="list-style-type: none">Grow segments; Short break, special interest from UK, cruise	<ul style="list-style-type: none">Increase in non-summer overnight holiday numbersFocus on higher value visitors (e.g. UK Silver Surfers)Grow day visit cruise passenger numbers	Ports of Jersey (PoJ), TO, Jersey suppliers
<ul style="list-style-type: none">Make markets; focusing on longer haul markets	<ul style="list-style-type: none">Industry-Visit Jersey agreement and marketing to new markets with suitable products (e.g. US with occupation story and product)	Jersey suppliers, TO
<ul style="list-style-type: none">Events	<ul style="list-style-type: none">Identify and cultivate events which offer long term growth prospects and put Jersey on the map outside main season	Jersey suppliers, Government (as enabler)

Image

Recommendation	Outcome/Success	Partners (together with Visit Jersey)
2 Help the world fall in love with Jersey		
<ul style="list-style-type: none">Cultivate the Jersey brand and promote “#theislandbreak”	<ul style="list-style-type: none">Positive customer engagement score (net promoter score)Positive media coverage; both in print and digital	Suppliers, TO
<ul style="list-style-type: none">Develop reasons to visit Jersey	<ul style="list-style-type: none">Jersey’s tourism brand is developed to embrace more reasons to visit that show just how special Jersey isJersey’s ecology provides inspiration for how we talk about Jersey	Suppliers

Access

Recommendation	Outcome/Success	Partners (together with Visit Jersey)
3 Sustain existing connectivity and introduce new routes	<ul style="list-style-type: none">Safeguard viable current air routes from the UKPotential additional UK routes are identified and brought on streamExtend number and duration of European charter flights, especially in the shoulder months	PoJ, TO
4 On-island experiences deliver to excellent standards	<ul style="list-style-type: none">Promote Welcome Host style programme for front-line transport staffBetter packaging of transport with other tourism productsExit Survey sentiment scores improve	Government, Transportation Providers - Liberty Bus, taxi associations, cycle and car hire firms, Jersey hospitality Association (JHA)

Destination

Recommendation	Outcome/Success	Partners (together with Visit Jersey)
5 Develop a year-round visitor economy	<ul style="list-style-type: none">Tourism Investment Fund establishedVisitor economy requirements taken into government policy deliberations (e.g. minimise burden of regulation and associated costs, planning regime receptive to visitor lodging and retail sector requirements)Jersey’s stock of accommodation sees productivity improvements as well as growth in bed numbers (e.g. self-catering units)Sharing economy (e.g. Airbnb) represented within in the visitor economyDevelop non-summer experiences and products (e.g. based on food, heritage, outdoors, sports, marine and events)Tourism businesses actively pursue productivity improvements; accelerate their rate of adoption of technology (e.g. to help reduce costs), deploy automation where possible, invest in business systems and processes to be digitally astute and develop staff to deliver world-class customer servicing	EDTSC, other Government departments, JHA, Business owners
6 Promote Channel Island (where it makes sense)	<ul style="list-style-type: none">Agree an SLA with Visit Guernsey	EDTSC, Visit Guernsey
7 Help visitors explore Jersey	<ul style="list-style-type: none">Deliver a year-round on-island information service for visitors to include print, face-to-face and digital communicationsVisitor satisfaction score	Partner - currently Liberty Bus

Partnerships

Recommendation	Outcome/Success	Partners (together with Visit Jersey)
8 Help Jersey fall in love with tourism	<ul style="list-style-type: none">Tourism businesses jointly work to showcase why tourism is important for the islandTourism seen as a career of choiceGrowth of a skilled tourism workforce (including better training)Improve working arrangements between government and its agenciesCreate a “public sector” Jersey “credentials pitch” that promotes Jersey as a place to live, work, play, invest in, do business with and visit	Suppliers Government, Schools, Highlands College, Business leaders, JHA Suppliers, trade EDTSC, Institute of Directors, Locate Jersey, Digital Jersey, Jersey Finance, Jersey Business

Summary of Key Risks

No plan operates in a vacuum. Execution of any plan is subject to both positive and harmful influences. Risks, some known others, as yet unknown, might potentially bear down on the plan. Regular two-yearly review and consultation with stakeholders will strive to mitigate risks.



Positive Risks

- Brexit outcomes could prompt a potential move away from Eurozone countries by UK holidaymakers
- Deployment of larger aircraft (e.g. A319 to A320)
- Hotel investment unlocks demand for short-breaks and adds capacity to summer bedstock
- Productivity gains by businesses through increasing use of technology



Negative Risks

- Hard Brexit or Brexit uncertainty (e.g. sharp deterioration in the UK economy leading to consumer indebtedness and rising interest rates) retards supply of visitors and staff
- Major carrier’s financial performance worsens leading to reduction in Jersey’s connectivity
- Jersey’s regulatory environment is not conducive to visitor economy (e.g. tourism’s financial and societal benefits insufficiently understood by broader community and government departments)
- Hospitality and tourism businesses do not have an available pool of potential employees
- Continued support from the States of Jersey; provision of grant for Visit Jersey and government policy conducive to growth of the visitor economy

The 2015 Jersey Destination Plan listed 21 recommendations. Progress against these 21 recommendations can be viewed online at: <https://business.jersey.com/jersey-destination-plan>

During October and November 2018 Visit Jersey administered an online survey to consult with stakeholders about this Destination Plan. The survey took around 20 minutes to complete. Over 80 online responses were received. The full survey findings can be viewed online at: (<https://business.jersey.com/jersey-destination-plan>). Additionally, 47 individuals, in either group settings or individual meetings, shared their passion and ideas.

We thank everyone who cares about Jersey and are working hard to ensure the world falls in love with Jersey.

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