

Visit Jersey Stakeholder Meeting

The Grand Hotel | 11 December 2018



- Current trends & outlook for 2019
 - Jersey Destination Plan
 - Visit Jersey 2019 Plan
- Product-Trade-Marketing
- Q&A



Jersey

Current trends & outlook for 2019

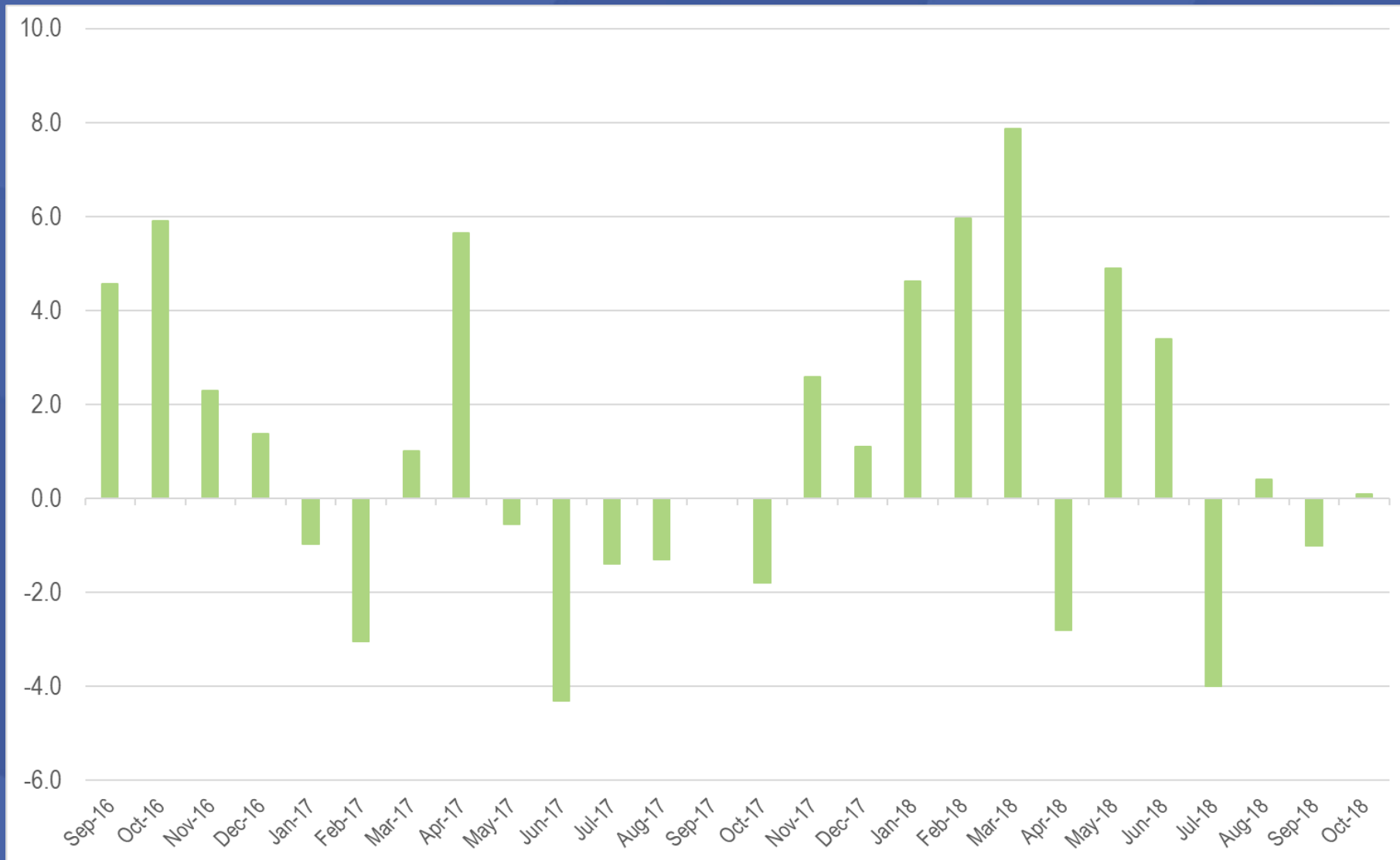
David Edwards | Head of Research & Evaluation



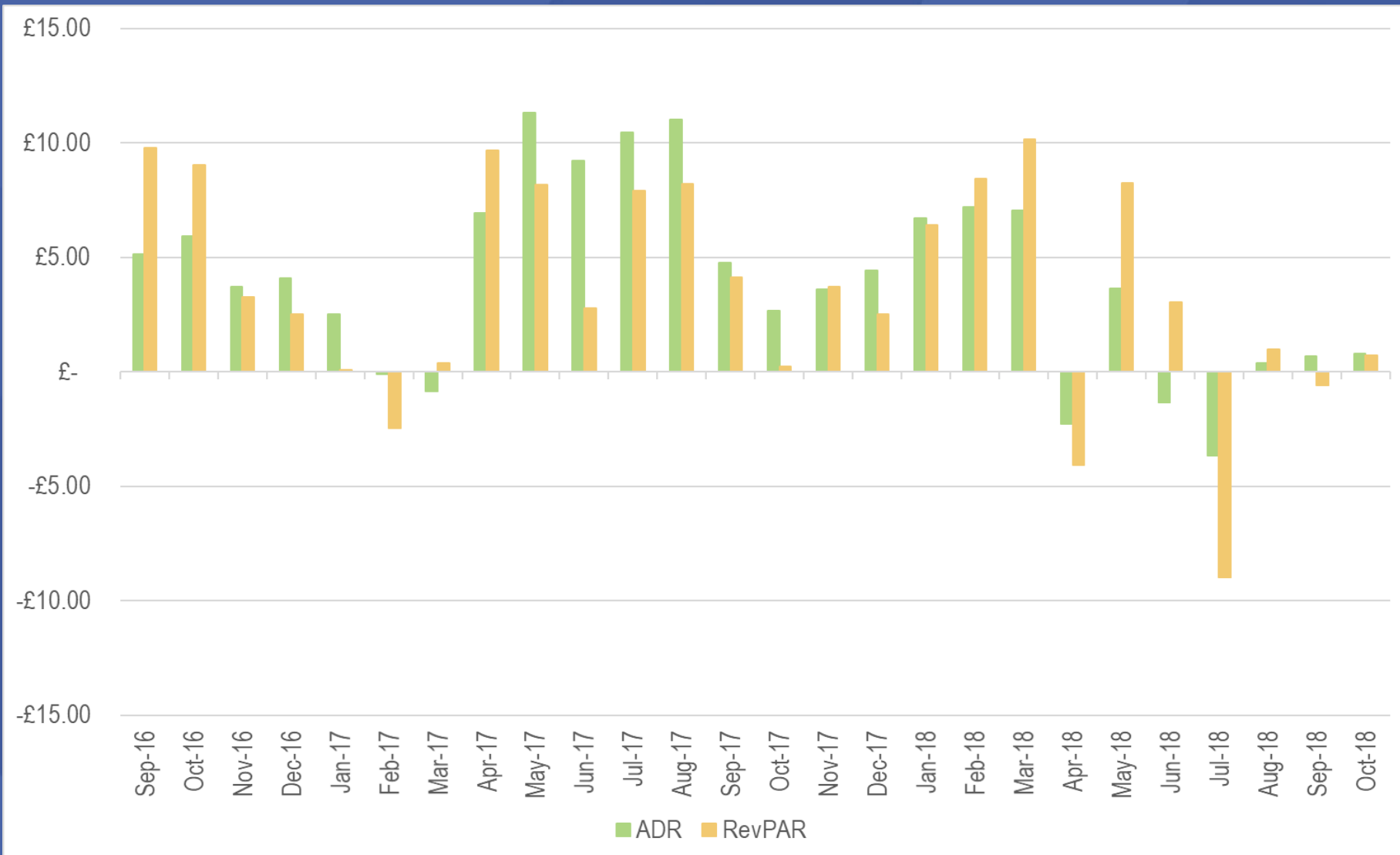
Expectations for full-year 2018

- No change expected in total visitor volumes
- Above-trend growth in on-island visitor spending
- Small dip in volume of overnight holiday visits, primarily due to early Easter and Beast from the East
- Average length of stay for holiday visits likely to have fallen by 0.1 nights, mirroring trend for holidays taken in GB
- Visitors are more upbeat about their experience in Jersey – Net Promoter Score set to be +5 on last year
- Holiday day-trippers decline in number, despite strong early results, due to Manche Iles Express disruption

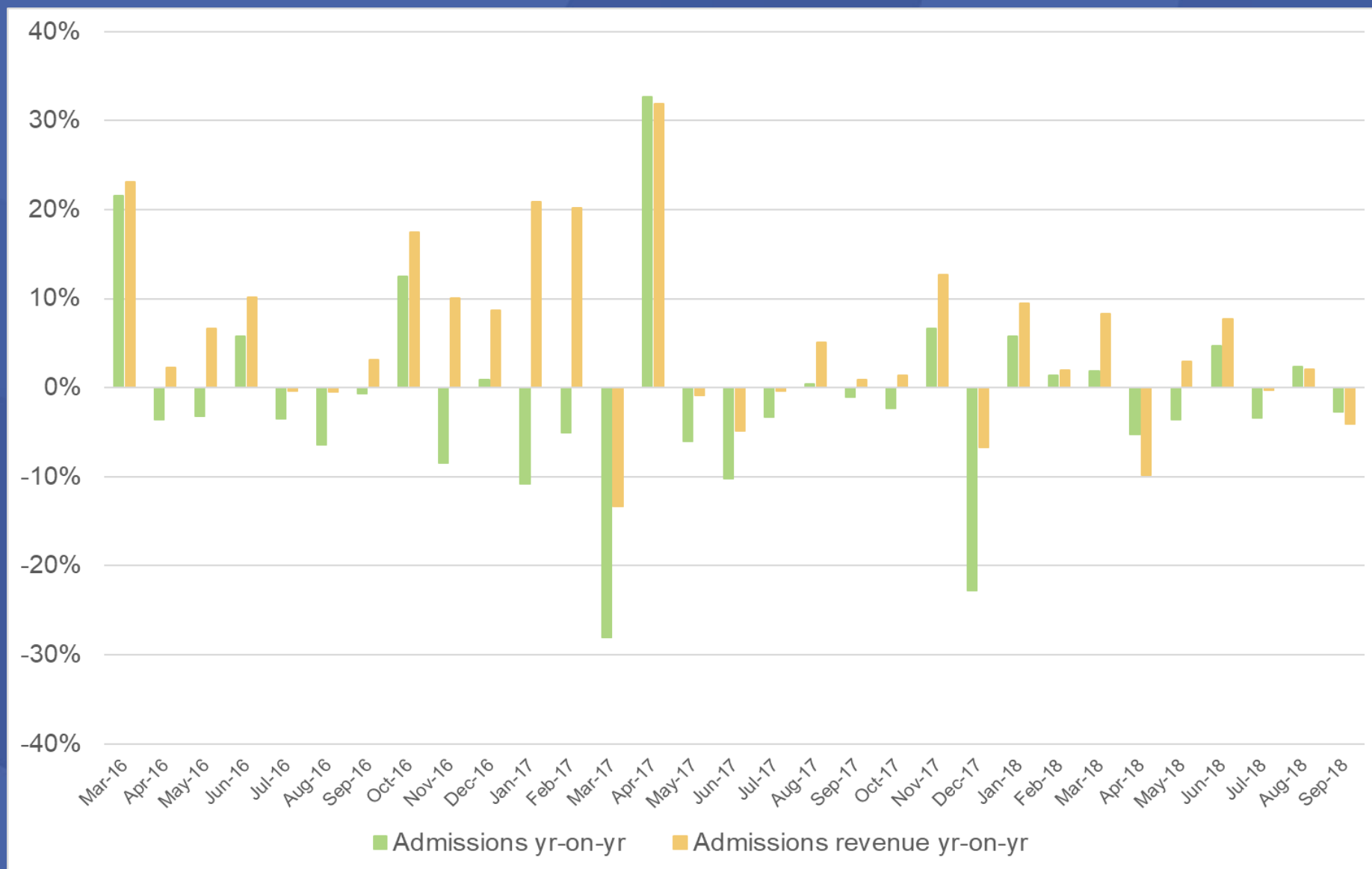
Jersey hotel occupancy annual change (%)



Jersey hotel ADR and RevPAR annual change



Jersey Attractions performance (yr-on-yr change)



Passenger Arrivals ups and downs Jan-Sep

Edinburgh	6,144
Birmingham	3,700
Visiting Yachtsmen	3,627
Guernsey Sea	2,763
London Gatwick	2,567

Guernsey Air	-	1,518
St Malo	-	2,181
Carteret	-	3,385
Sark	-	3,538
Poole	-	3,821

Were our 2018 assumptions right?

Connectivity

- +37% more seats from Germany +30%
- Seasonal inter-island ferry service X / ✓
- Enhanced inter-island flight choice X

Accommodation

- Premier Inn opens ✓
- No change in ADR differential (c£22) ✓

Economics

- Sterling remains weak ✓
- No sudden economic downturn ✓

Policy

- Nothing that will adversely impact tourism businesses or visitors experience of Jersey ✓

Looking ahead to 2019



"Predicting the future is easy... getting it right is the hard part"

Factors that will play a role in the future



What about
the 'B' word?

Some assumptions for 2019

Connectivity

- Seaplane service launches before summer
- Mix of airlines serving the island remains stable

Accommodation

- Continued growth in AirBnB
- No change in ADR differential between Jersey and UK

Economics

- Sterling will move by +/-15% from current level
- Consumer confidence will weaken in the UK

Policy

- Nothing that will adversely impact tourism businesses or visitors experience of Jersey

Social

- People will, more than ever, place value on their holidays, and seek out holidays that offer good value

Jersey Destination Plan



Jersey Destination Plan



Priorities

1

Markets

Grow a portfolio of markets



2

Image

Help the world fall in love with Jersey



3

Access

Sustain existing connectivity and introduce new routes



On-Island experiences to deliver excellent standards



4

Destination

Develop a year-round visitor economy



Promote the Channel Islands



Help visitors explore Jersey



5

Partnerships

Help Jersey fall in love with tourism



JDP Recommendations

1. Grow a portfolio of markets that drives current opportunities and creates long-term growth in visits and spend
2. Help the world fall in love with Jersey
3. Sustain existing connectivity and introduce new routes
4. On-island experiences deliver to excellent standards
5. Develop a year-round visitor economy
6. Promote Channel Islands (*where it makes sense*)
7. Help visitors explore Jersey
8. Help Jersey fall in love with tourism

Visitor Economy KPIs



A full-page background image showing the silhouettes of two people running through shallow water towards a bright sunset. The sun is low on the horizon, creating a strong orange glow and lens flare. In the distance, a small, dark structure, possibly a lighthouse or tower, is visible on the horizon line. Water splashes are visible around the runners' legs.

Product

Win hearts & change minds

Meryl Laisney | Head of Product & Events



Signature Experiences

Support Events

Reasons to visit:
thematic & niche

Accessibility
(FIT, Group, MICE)

*Productivity &
Competitiveness*

Distribution on
& off-island

How to be agile

Partnership programme

Signature Experiences

Product Theme	Experience Pillars	Supporting events	Brand Promise
Nature & Wilderness	Rewild Yourself		Reconnect with nature
	Tidal Trail		
Active & Wellbeing	Extreme Jersey		Come up for air
	Jersey on the Rocks		
People & Culture	From Field to Fork		Optimism, individualism, togetherness
	Art Tour of Urban Jersey		
History & Heritage	Around the Island War Tour		
	Jersey Peace Trail		Pride & passion
	V75 (2020)		



Events Jersey



On & Off Island



Advise on strategic direction and priorities



Co-ordinate an annual events calendar for Jersey



Promote event organisation best practice



Share insights & research into the events industry



Curate MICE inspirational itineraries



Facilitate funder & organiser introductions

Events Jersey

Incubator Marketing Programme

Criteria & eligibility

- Celebrate the island break across four Signature Experiences product pillars (nature & wilderness, wellness & active, people & culture, history & heritage)
- Target audience aligns to Jersey's best prospect visitors
- Both new and existing reoccurring events
- Incremental visitor numbers in shoulder season (Oct – April)
- Commitment to spend £10,000 marketing
- Measure event impact > 5:1 ROI on joint marketing activity
- Partners-led (integrate hotel/tour operator distribution)



Trade

Sarah Barton | Head of Trade

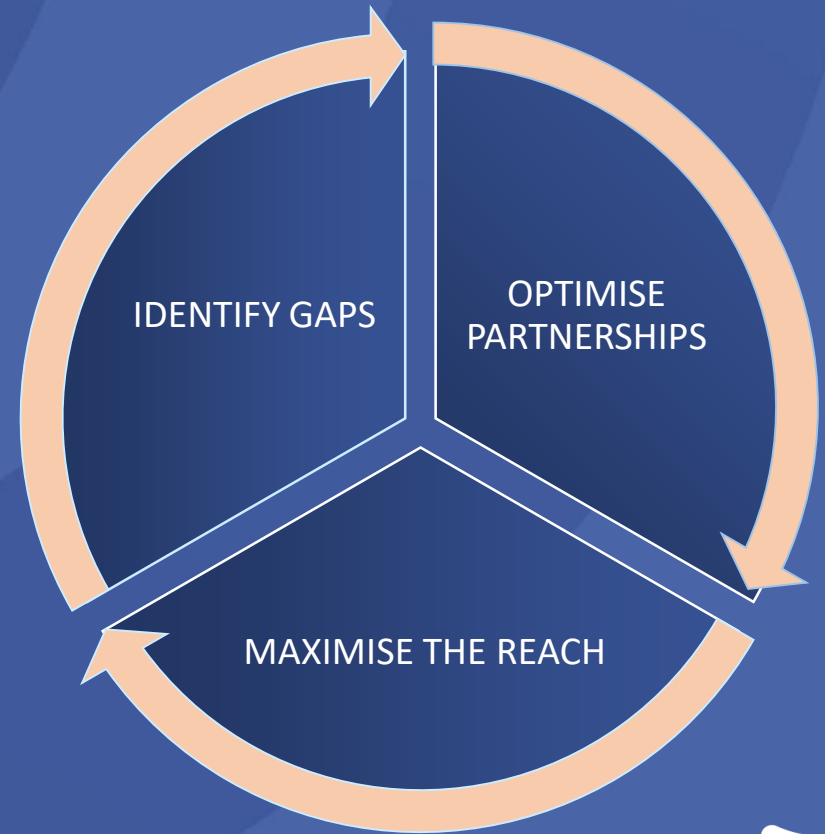


Trade vision

- Build a balanced portfolio of trade partnerships engaged in telling Jersey's story
- Deliver year round accessibility and sustainable growth in visitor volume and spend

Trade Strategy

Work with our industry partners to distribute and extend reach of our tourism product



Trade: build a balanced market portfolio

With Ports of Jersey build on best prospect research and route capacity analysis to ...



Maximise current flight capacity and ensure route sustainability



Grow the seasonality of current routes



Drive greater destination awareness and new visitor volume through partnership optimisation



Identify and develop qualified new route opportunities



Trade: optimise partnerships & identify gaps

Maximise Jersey's Distribution ...



Approach best match partners in the UK & Europe



Nurture existing partnerships to capture new sources of visitors to extend season and spend



Identify key trade to collaborate with to extend brand and reach



Trade: bring Jersey to life

Amplify the island's story through the trade...



Collaborate with marketing to deliver industry ready toolkits to inspire and sell the destination



In partnership with product, develop a relevant easy to use portfolio to showcase the island offering and signature experiences



Identify and attend key trade events and develop bespoke events



Develop bespoke buyer and sales influencer educational programmes



Marketing

#theislandbreak



Louise Ashworth | Head of Marketing

Summer 2019

Summer is Here

The play on the double meaning of 'here' means the headline has stand out in the winter season, and provides a sense of immediacy to book in summer.

Summer is here will run in Q1 through print and video activity, helping to ensure that when our audience thinks of summer, they think of a Jersey Summer.

Campaign themes

Natural harmony is here

Find yourself here

Culture is here

Come together here

Assets and opportunities

Video edits, imagery, campaign offers, campaign toolkit



Spring 2019

Food, friendship & fun

As a small island famous for its food, Jersey's bursting with flavour from abundant local produce and rich creamy milk to seafood straight from the island's clear waters.

From beach cafes to chic restaurants, farm stalls to village delis, Jersey is packed with amazing eating experiences to add an authentic local flavour to your stay.

Just bring a healthy appetite.

Campaign themes

Feed your appetite

Burst into life this spring

See the island in full colour

Assets and opportunities

Campaign video, imagery, campaign offers, campaign toolkit



Winter 2019

Explorers Wanted!

Exploring the island break in winter is about adventure, and journey of self-discovery. We know that everyone embraces winter in their own way.

How you explore is up to you, you'll just need a coat-load of curiosity and the answer to the question, what type of explorer are you?

Explorer types

The weekend wanderer

The active adventurer

The soul seeker

The romantic Rambler

Assets and opportunities

6 x campaign video edits, imagery, campaign offers, campaign toolkit



Thank you

