



Completed or well on target
Some progress to date but more required
Some way off target

1			
Commission an independent examination of the Jersey visitor economy to better understand the economic (jobs and GVA) as well as the social (heritage, cultural, etc.) contribution tourism makes to the wellbeing of the island	VJ	<ul style="list-style-type: none"> <li>Document published in first half of 2016</li> <li>Document published end 2016/early 2017</li> </ul>	<ul style="list-style-type: none"> <li>Study completed and reported November 2016</li> <li>Update of headline metrics to be produced during Q4 2018 along with short topic report reflecting emerging priorities of new government</li> <li>Remaining elements are all on-going and taken forward through the relevant Product Action Group sub-groups</li> </ul>
Engage with relevant government departments and agencies to highlight how policy decisions can impact the visitor economy	VJ, EDD, other government departments	<ul style="list-style-type: none"> <li>Tourism's needs reflected in government decisions</li> </ul>	<ul style="list-style-type: none"> <li>1948 Tourism Law has been reviewed. Proposals submitted and awaiting new government response</li> <li>Support given for planning applications for tourism sector and for licences for hospitality jobs</li> <li>Supported the creation of the Jersey National Park alongside DFI dept.</li> <li>Sports tourism – engaged with Jersey Sport when formed to facilitate joined up approach</li> <li>Waste strategy – Supported industry and engaged with the DFI on proposed waste strategy. Policy note produced</li> <li>Licensing law – Engaged in revision of licensing law</li> <li>Wide range of work on productivity and policy issues, e.g. Minimum Wage. We have access to rich fare data to demonstrate competitiveness challenges but have not used this extensively in a public arena (would need RDC permission to do so)</li> <li>Edinburgh route- a good example of Visit Jersey working with PoJ/airline to grow connectivity</li> </ul>
		<ul style="list-style-type: none"> <li>Jersey Visitor Economy annual conference to gauge progress and refresh the JDP</li> </ul>	<ul style="list-style-type: none"> <li>Completed November 2016 and October 2017 (autumn seminars)</li> <li>December 2018 event planned</li> </ul>

2			
The Jersey Destination Plan will aim to deliver growth, improve competitiveness and productivity of the tourism sector	VJ, Government, JHA	<ul style="list-style-type: none"> <li>JDP published September 2015</li> </ul>	<ul style="list-style-type: none"> <li>Completed</li> </ul>
		<ul style="list-style-type: none"> <li>Objectives monitored yearly and delivered</li> </ul>	<ul style="list-style-type: none"> <li>2016 and 2017 Annual Report published</li> </ul>
		<ul style="list-style-type: none"> <li>Funding mechanism agreed to sustain momentum</li> </ul>	<ul style="list-style-type: none"> <li>Submitted annual Business Plan to EDTSC in 2016, 2017</li> <li>Industry/JHA supportive of Visit Jersey's remit</li> <li>MTEP supportive of tourism</li> <li>Tourism Development Fund – Depleted. New investment case with EDTSC</li> <li>Events Jersey – agreed with EDTSC to establish and set up October 2016</li> <li>New government yet to confirm commitment to tourism/Visit Jersey</li> </ul>
		<ul style="list-style-type: none"> <li>Objective assessment of Jersey's competitive position vis a vis competitors (e.g. cost of landing &amp; associated charges)</li> </ul>	<ul style="list-style-type: none"> <li>Examination of the Jersey visitor economy study presented November 2016</li> <li>Periodic Fare Tracker survey completed</li> <li>Highlight best practice from competitor destinations and share insight e.g. engagement with Visit Kent, Scottish Tourism Alliance, UKInbound partnerships</li> </ul>
Raise productivity by developing a year-round visitor economy	VJ, JHA, Business owners	<ul style="list-style-type: none"> <li>Establish &amp; report on Island's RevPAR</li> </ul>	<ul style="list-style-type: none"> <li>STR Global retained to conduct island-wide productivity benchmarking. We continue to grow the proportion of properties on the island that provide data to STR to help monitor seasonality issues.; Over 50% of bedstock signed up to island-wide benchmarking. Recruitment continues</li> </ul>
		<ul style="list-style-type: none"> <li>Improvements in room utilisation</li> </ul>	<ul style="list-style-type: none"> <li>On-going business support. Launch of the Brilliant Basics Programme</li> <li>Business focus for Events Jersey. Strategy produced in February 2018 and appointment of Hills Balfour as business events agency lead</li> <li>Support given to external event organisers in shoulder months, e.g. Super League Triathlon, Breca Swimrum, Digital Tourism Think Tank</li> </ul>
		<ul style="list-style-type: none"> <li>Extending period of charter flights</li> </ul>	<ul style="list-style-type: none"> <li>Build reasons to visit earlier and later to encourage operators to extend . Swiss and Germany tour operators expected to extend their programmes in 2019</li> </ul>
		<ul style="list-style-type: none"> <li>New routes</li> </ul>	<ul style="list-style-type: none"> <li>Edinburgh from Spring 2018</li> <li>Bournemouth from Spring 2019</li> <li>Route modelling work-in-progress with PoJ</li> </ul>
Improve tourism's profile as a career of choice	Government, Schools, Skills Unit, Business leaders	<ul style="list-style-type: none"> <li>Tourism leaders engage in out-reach programme</li> </ul>	<ul style="list-style-type: none"> <li>Supported with intern from Highlands College</li> <li>Contributing to the Skills Jersey agenda</li> <li>Tourism Trailblazers campaign launching in June 2018. To be shared across Jersey Hospitality Association and Skills Jersey members (i.e. Social Security, Trackers)</li> </ul>
		<ul style="list-style-type: none"> <li>Deliver annual "Tourism Heroes" media campaign</li> </ul>	<ul style="list-style-type: none"> <li>Tourism heroes- 18 (to date) Islanders showcased as ambassadors in VJ branding and marketing campaigns</li> </ul>

3			
Jersey's tourism export markets to be categorized into 3 clusters:  1 Nurture  2 Grow  3 Make	VJ	<ul style="list-style-type: none"> <li>Customer target groups agreed</li> </ul>	<ul style="list-style-type: none"> <li>Research in UK &amp; Europe completed and informing market targeting</li> </ul>
		<ul style="list-style-type: none"> <li>Adoption of the VJ consumer research findings by trade partners</li> </ul>	<ul style="list-style-type: none"> <li>Bi-weekly newsletter to share insights</li> <li>Development of Gold, Silver, Bronze partner marketing</li> <li>One-on-one marketing meetings with trade partners</li> </ul>
		<ul style="list-style-type: none"> <li>Identify common objectives and actions across government and industry</li> </ul>	<ul style="list-style-type: none"> <li>Mobilise 'Team Jersey'. Ten key recommendations for the development of Jersey's tourism experience economy identified through the Product Action Group. (predicated on deepening support across government departments, to work together with Visit Jersey and our industry partners)</li> </ul>
		<ul style="list-style-type: none"> <li>Support from industry for Jersey marketing initiatives</li> </ul>	<ul style="list-style-type: none"> <li>Visit Jersey's partnership programme provides a framework for on-island suppliers (accommodation and attraction sectors) to partner with Visit Jersey. 'Be More Richie' launched in Spring 2018 to engage industry and showcase opportunities to work collaboratively with Visit Jersey</li> <li>The Gold/Silver/Bronze tiered approach has 26 gold and silver partners.</li> <li>Eat &amp; Drink, and Retail to launch in 2019</li> <li>Partner use a Dashboard which sets out referral targets</li> <li>Over 250 partner meetings held annually</li> </ul>
4			
Nurture  Continue supporting leisure group business from the UK and Europe and search for additional ways to boost incremental growth	VJ, JHA, Ports, Industry	<ul style="list-style-type: none"> <li>Maintain summer charter volumes</li> </ul>	<ul style="list-style-type: none"> <li>VJ agrees risk-share agreements with charter operations against KPI's</li> <li>Destination Jersey Workshop April 2016 and April 2018 provided opportunity for buyers and sellers to meet, next workshop planned for Spring 2020</li> <li>Events programme for tour operators providing promotional hooks for potential visitors and specialist group tours</li> <li>Appoint Hills Balfour (2017) and Head of Trade (2018)</li> </ul>
		<ul style="list-style-type: none"> <li>No net reduction in accommodation stock</li> </ul>	<ul style="list-style-type: none"> <li>Provide insights and support for new lodgings; Premier Inn June 2018 and one other (in pipeline)</li> <li>Support Jersey businesses planning applications (e.g. farmer applications, Tamba, etc.) to include Airbnb-type establishments and farmstay</li> <li>Boost growth throughout the four seasons (in line with Events Strategy)</li> </ul>
		<ul style="list-style-type: none"> <li>Halt long-term decline in leisure staying visitor numbers</li> </ul>	<ul style="list-style-type: none"> <li>Launch new brand</li> <li>Developed off-season campaigns</li> <li>Create joint marketing opportunities for suppliers and partners</li> </ul>

5			
Grow	VJ	<ul style="list-style-type: none"> <li>Complete research</li> </ul>	<ul style="list-style-type: none"> <li>Completed and shared</li> </ul>
Research to identify new sources of visitors from the UK & Europe		<ul style="list-style-type: none"> <li>Describe and agree best prospects for future growth segments</li> </ul>	<ul style="list-style-type: none"> <li>2 x nurture and 2 x growth segments identified</li> </ul>
		<ul style="list-style-type: none"> <li>Communicate with stakeholders</li> </ul>	<ul style="list-style-type: none"> <li>Bi-weekly newsletters and regular meetings</li> <li>Trade newsletter and business website relaunched</li> </ul>
		<ul style="list-style-type: none"> <li>Product created/modified to respond to potential demand (improved product-market fit)</li> </ul>	<ul style="list-style-type: none"> <li>Ten key recommendations and deliverables identified from the Product Action Group</li> <li>Signature Experiences workshop planned for 10 September to define key products</li> <li>60 new downloadable self-guided walks and 8 new cycle routes</li> </ul>
6			
Make	VJ, LJ, JF,	<ul style="list-style-type: none"> <li>Overseas travel trade partners (e.g. tour operators) producing Jersey itineraries</li> </ul>	<ul style="list-style-type: none"> <li>2016 and 2017 trade co-operative programmes completed. 2018 in progress</li> <li>Piggyback on VisitBritain's global platform</li> </ul>
Identify third parties active in potential make markets		<ul style="list-style-type: none"> <li>Increased visitor number and spend from Make markets</li> </ul>	<ul style="list-style-type: none"> <li>Hello China discussions</li> <li>HIS Japan Channel Island 2016 programme developed</li> <li>Metings with mid-east and Asia tour operators to determine appetite</li> </ul>
7			
Research and develop a Jersey proposition	VJ, JHA,	<ul style="list-style-type: none"> <li>Commission agency and deliver brand proposition by Spring 2016</li> </ul>	<ul style="list-style-type: none"> <li>Completed</li> </ul>
		<ul style="list-style-type: none"> <li>More effective marketing</li> </ul>	<ul style="list-style-type: none"> <li>Increased digital channel penetration to match customer preferences</li> </ul>
		<ul style="list-style-type: none"> <li>Increased conversion, visits and spend</li> </ul>	<ul style="list-style-type: none"> <li>ROI conversion report produced for each marketing activity and summarised in Annual Reports</li> </ul>
		<ul style="list-style-type: none"> <li>Positive stakeholder engagement</li> </ul>	<ul style="list-style-type: none"> <li>Stakeholder surveys completed 2016 and 2017 and planned for 2018</li> </ul>
8			
Consult with and agree a marketing programme with Visit Guernsey that builds on the strengths of our joint identity where it makes sense	VJ, VG	<ul style="list-style-type: none"> <li>A marketing accord that is accepted by the trade in Jersey, Guernsey and the other islands</li> </ul>	<ul style="list-style-type: none"> <li>Draft Memorandum of Understanding produced in 2016 and with Guernsey</li> </ul>
		<ul style="list-style-type: none"> <li>Annual programme agreed and delivered</li> </ul>	<ul style="list-style-type: none"> <li>Trade programme includes joint stand with commercial partners at ITB Chanel Island website developed <a href="http://www.channelislands.com">www.channelislands.com</a></li> </ul>

			<ul style="list-style-type: none"> <li>Channel Island Heritage Festival 2016 and 2017 completed. Visit Jersey did not participate in 2018 campaign due to ROI concerns</li> <li>Joint VG/VJ risk-share agreements with German and Dutch tour operators</li> </ul>
		<ul style="list-style-type: none"> <li>Establish an Islands Research Group</li> </ul>	<ul style="list-style-type: none"> <li>No strong appetite from VG but good regular exchange of ideas</li> </ul>
9			
VJ to be principally responsible for identifying and warming up leads- dreaming, researching and booking stages	VJ, Industry	<ul style="list-style-type: none"> <li>Increased exposure of brand and products through a range of channels</li> </ul>	<ul style="list-style-type: none"> <li>Marketing campaigns to create awareness and desire</li> <li>Results summarised in VJ's annual reports</li> </ul>
Industry partners to be responsible for converting, taking booking and delivering compelling experiences- booking, experience and sharing stages		<ul style="list-style-type: none"> <li>Increased visitor numbers and spend</li> </ul>	<ul style="list-style-type: none"> <li>Share insights and monthly statistical reports</li> </ul>
		<ul style="list-style-type: none"> <li>Visitor satisfaction survey</li> </ul>	<ul style="list-style-type: none"> <li>Exit survey introduced from July 2016 (registration cards dropped)</li> <li>Routinely monitor Holiday visitor Net Promoter Score and visitor sentiment</li> <li>Support the Jersey Attractions Group (JAG) with monthly performance reports</li> <li>Visit Experience Research and Product Audit delivered in 2017 and 2018 to inform direction of commercial investment</li> </ul>
10			
E-marketing and social media channels are key routes to market	VJ, Industry	<ul style="list-style-type: none"> <li>Engagement and dwell time of customers achieve industry benchmark scores</li> </ul>	<ul style="list-style-type: none"> <li>Marketing dashboard launched in 2017</li> <li>Annual Reports include data</li> </ul>
		<ul style="list-style-type: none"> <li>Social sharing and advocacy</li> </ul>	<ul style="list-style-type: none"> <li>Marketing dashboard launched in 2017</li> <li>Annual Reports include data</li> </ul>
		<ul style="list-style-type: none"> <li>Partner marketing campaign bookings</li> </ul>	<ul style="list-style-type: none"> <li>Tailored service for gold and silver partners</li> <li>Marketing dashboard launched in 2017</li> <li>Annual Reports include data</li> </ul>
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	VJ, JHA, Attractions Group	<ul style="list-style-type: none"> <li>Increased exposure of Jersey proposition and products on a range of appropriate digital channels</li> </ul>	<ul style="list-style-type: none"> <li>Marketing campaigns on-going</li> </ul>

12			
Promote tourism within Jersey in an innovate, economic and efficient way	VJ, commercial partners	<ul style="list-style-type: none"> <li>Production and distribution of information that meets the needs of visitors on-island (likely to be predominantly digital in nature)</li> </ul>	<ul style="list-style-type: none"> <li>Tendered "What's On" and official Map in 2016</li> <li>Jersey.com real-time update for visitor information</li> </ul>
		<ul style="list-style-type: none"> <li>Provide an on-island information service for visitors utilising public and private means</li> </ul>	<ul style="list-style-type: none"> <li>Ports of Jersey and Jersey Heritage provided service initially</li> <li>Tourist Information Centre moved to Bus station April 2018 in partnership with Liberty Bus</li> </ul>
13			
Improve regional connectivity between Jersey, the UK and mainland Europe	Ports, Carriers, Government, VJ	<ul style="list-style-type: none"> <li>Routes at threat monitored and remedial actions agreed if the economic case for visitor numbers and spend is confirmed as a net benefit to Jersey</li> </ul>	<ul style="list-style-type: none"> <li>VJ working with Ports to identify routes requiring support alongside best prospects for new routes</li> </ul>
		<ul style="list-style-type: none"> <li>Ten-year route development plan with a focus on out of main summer travel</li> </ul>	<ul style="list-style-type: none"> <li>No formal plan but frequent planning meetings with PoJ</li> </ul>
		<ul style="list-style-type: none"> <li>Best prospects routes identified</li> </ul>	<ul style="list-style-type: none"> <li>Best Prospects Model developed and shared in 2016 and 2017</li> </ul>
		<ul style="list-style-type: none"> <li>Partner marketing campaign delivered</li> </ul>	<ul style="list-style-type: none"> <li>Support for airline and sea carrier marketing programmes. Specifically, Condor, easyJet, BA and continental tour operator campaigns</li> </ul>
		<ul style="list-style-type: none"> <li>Fare monitor established and reporting regularly</li> </ul>	<ul style="list-style-type: none"> <li>Analyse route level fare data by lead-time through RDC Aviation</li> </ul>
14			
Develop the on-island transportation offering; public and private	Government, Transportation Providers	<ul style="list-style-type: none"> <li>Deliver Welcome Host style programme for front-line transport staff</li> </ul>	<ul style="list-style-type: none"> <li>Training by Visit Jersey product team available to front line staff</li> <li>Destination training to be rolled out in 2019</li> </ul>
		<ul style="list-style-type: none"> <li>Better packaging of transport with other tourism products</li> </ul>	<ul style="list-style-type: none"> <li>2018 partnership with Liberty Bus</li> </ul>

15			
Develop tourism in Jersey into a year-round visitor economy	VJ, JHA, EDD, CoC, J Bus	<ul style="list-style-type: none"> <li>Year-round growth in visitor numbers and spend</li> </ul>	<ul style="list-style-type: none"> <li>Product Strategy launched spring 2018</li> <li>Development of Signature Experiences to welcome visitors year-round.</li> <li>M.I.C.E. development outside main season promoted by Events Jersey</li> <li>Events outside main season – see recommendation 19</li> </ul>
		<ul style="list-style-type: none"> <li>Jersey offers Wi-Fi across the island (or at least an effective network of Wi-Fi hotspots open to visitors)</li> </ul>	<ul style="list-style-type: none"> <li>Parish of St Helier lead on this; initial hot spots identified at new signage spots in St Helier</li> <li>In 2019 Highlands College will be working to deliver visitor information at these sites going forward</li> </ul>
Increase the value of the visitor economy by identifying and nurturing new higher value source markets	VJ, JHA, Industry	<ul style="list-style-type: none"> <li>Agree series of niche opportunities</li> </ul>	<ul style="list-style-type: none"> <li>Mid-week and weekend break Southern England market targeted out of main summer season</li> <li>Sports-related tourism opportunities</li> </ul>
		<ul style="list-style-type: none"> <li>Average spend of visitor increases ahead of inflation</li> </ul>	<ul style="list-style-type: none"> <li>Joint efforts of all in tourism and Annual Reports summarise progress</li> </ul>
16			
Encourage the development and improvement of Jersey's stock of accommodation to meet visitors' needs	VJ, EDD, JHA, Government planning	<ul style="list-style-type: none"> <li>Equal treatment of all accommodation suppliers</li> </ul>	<ul style="list-style-type: none"> <li>1948 Tourism Law and General Provisions under review</li> <li>All Visit Jersey public comments stress a level playing field for all suppliers</li> <li>From 2018, Visit Jersey will encourage local accommodation providers to adopt the AA accreditation programme</li> </ul>
		<ul style="list-style-type: none"> <li>Planning regime that is responsive to visitor lodging requirements</li> </ul>	<ul style="list-style-type: none"> <li>1948 Tourism Law being reviewed</li> <li>Growth in Airbnb, support and advice offered</li> <li>Explore a dedicated campaign to promote Airbnb in 2019.</li> </ul>
17			
From 2016 to 2020 deliver a thematic destination programme	VJ, JHA, Attractions Group, Industry	<ul style="list-style-type: none"> <li>Series of annual product themes</li> </ul>	<ul style="list-style-type: none"> <li>2016- launched new destination brand</li> <li>Research findings feed into annual campaigns</li> </ul>
		<ul style="list-style-type: none"> <li>Product development and packaging aligned to themes</li> </ul>	<ul style="list-style-type: none"> <li>Product Action Group established in 2018; on-going consultation with industry partners</li> </ul>
		<ul style="list-style-type: none"> <li>Year-round growth in visitor numbers and spend</li> </ul>	<ul style="list-style-type: none"> <li>Seasonal campaigns created and delivered</li> </ul>

18			
Support events-led tourism	EDD, VJ	<ul style="list-style-type: none"> <li>Deliver market insights and advice to support events' design and marketing</li> </ul>	<ul style="list-style-type: none"> <li>Event Jersey "established" within Visit Jersey from October 2016</li> <li>Event Jersey Executive appointed</li> <li>Events Jersey Strategy delivered in February 2018</li> <li>Events toolkit available to download on events.jersey.com</li> <li>Marketing opportunities to access the visitor economy promoted to event organisers</li> </ul>
		<ul style="list-style-type: none"> <li>Suite of best practice tools and performance metrics consisting of: <ul style="list-style-type: none"> <li>design</li> <li>promotion</li> <li>delivery of events on Jersey</li> </ul> at strategic, tactical and operational levels</li> </ul>	<ul style="list-style-type: none"> <li>Research and consultation in 2016 for delivery in 2017 and 2018</li> </ul>
19			
Identify and cultivate a small number of high profile events which offer long term growth prospects, serve to put Jersey on the map, and have a positive investment potential	EDD, VJ, CoC, IoD, JB	<ul style="list-style-type: none"> <li>Calendar of events (this could be a list of single events, a grouping of events/festivals under a common "brand" such as Jersey Festival of Food, Jersey Speed Feast linking the Air Show, Boat Show, Motoring Shows, or a series of Week Festival/events throughout the year)</li> </ul>	<ul style="list-style-type: none"> <li>Events Jersey strategy launched in 2018.</li> <li>Event research conducted in 2017 and 2018 for Super League Triathlon</li> <li>Programme of over 50 events</li> <li>Events Jersey strategy outline events programme to launch in 2019</li> </ul>
		<ul style="list-style-type: none"> <li>Net financial benefit to the Jersey economy</li> </ul>	<ul style="list-style-type: none"> <li>Events Jersey lead on this</li> </ul>
20			
Encourage tourism businesses to be more digitally astute	VJ, DJ, CoC, JB	<ul style="list-style-type: none"> <li>Businesses actively seek out digital solutions to answer their needs</li> </ul>	<ul style="list-style-type: none"> <li>2016 Enterprise Week workshop</li> <li>Digital upskilling workshops October/November 2016</li> </ul>
		<ul style="list-style-type: none"> <li>Businesses embrace digital channels to market</li> </ul>	<ul style="list-style-type: none"> <li>Facilitate and educate through workshops and product listing process</li> </ul>
		<ul style="list-style-type: none"> <li>Digital solution companies to provide solutions that give</li> </ul>	<ul style="list-style-type: none"> <li>Digital Jersey offering solutions and competition to assist development</li> <li>Private sector firms provided opportunities to engage with industry at various workshops</li> </ul>



		Jersey the edge and improve the visitor experience	
21			
Implement closer working arrangements between government and its agencies and harness opportunities for greater cooperation and continuity of the Jersey “brand” and messaging	EDD, IoD, VJ, LJ, DJ, JF, JB	<ul style="list-style-type: none"> <li>• Creation of a Jersey “credentials pitch” that promotes Jersey as a place to live, invest in, do business with, visit and study</li> </ul>	<ul style="list-style-type: none"> <li>• Jersey destination brand launched</li> <li>• Ambassador edits</li> <li>• Digital assets library</li> </ul>
		<ul style="list-style-type: none"> <li>• Cross-selling all of Jersey at international exhibitions, conferences and meetings</li> </ul>	<ul style="list-style-type: none"> <li>• Jersey London Day event support</li> </ul>
		<ul style="list-style-type: none"> <li>• Involvement of the commercial and voluntary sectors in telling the Jersey story</li> </ul>	<ul style="list-style-type: none"> <li>• Marketing campaigns are partner campaigns combining public and commercial organisations</li> </ul>