

Explore.

#theislandbreak



But always we will be storytellers; creating and curating great stories about Jersey that provide reasons for people to come.



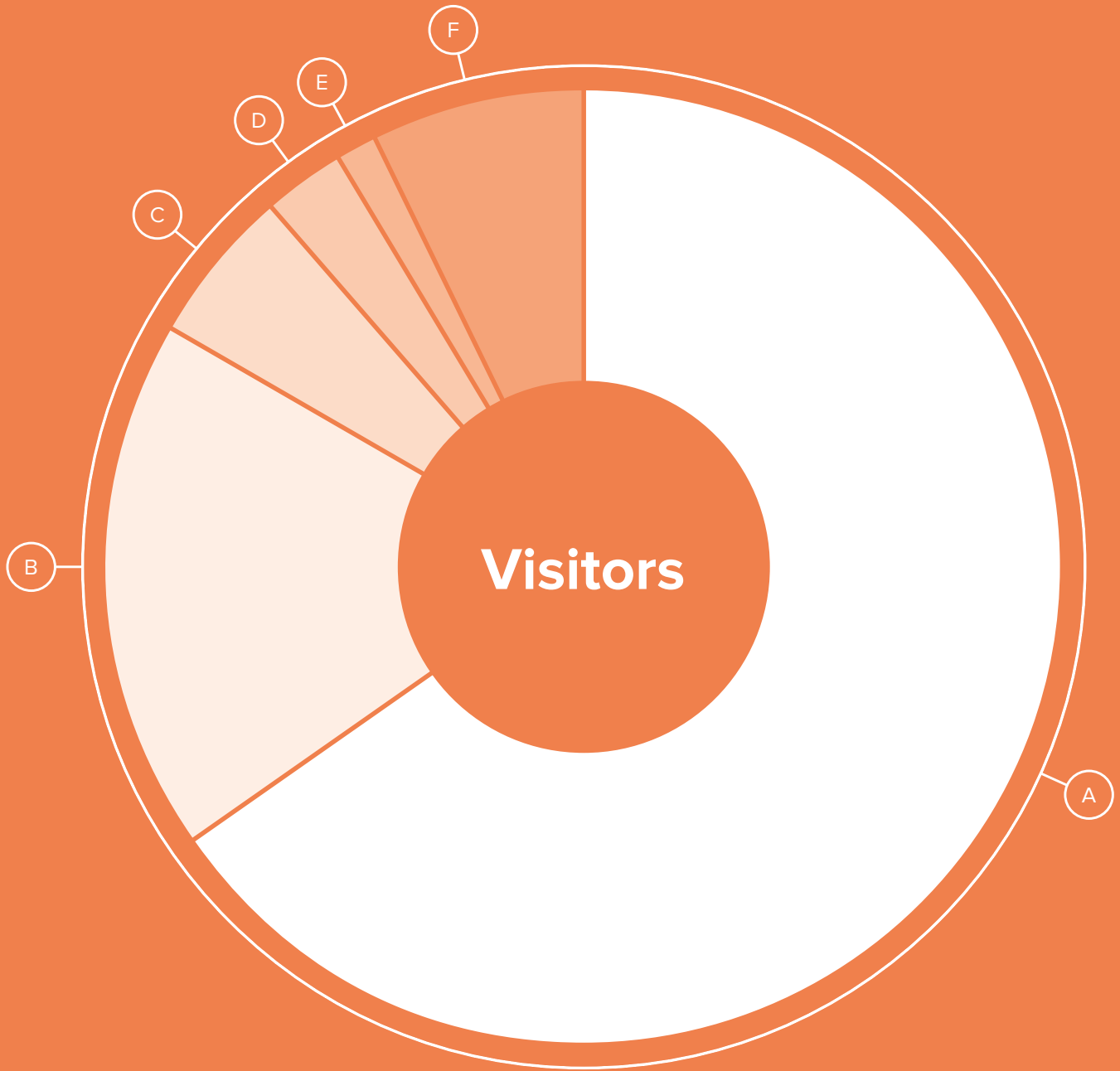
Watch our Annual Report 2017 short film, introduced by CEO Keith Beecham to see how our work makes a difference.

<https://youtu.be/00CKHLp0Bso>

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2017 Highlights



A	UK	475,000	Total =
B	France	132,000	727,000
C	Guernsey	38,000	
D	Germany	21,000	
E	Ireland	9,000	
F	Other	52,000	



Spent by visitors in the local economy

£250^M



Visitor nights spent on the island

£2.9^M



Staying Leisure visitors - best year of growth since 2007

+ 413,200



Visitor spend directly attributable to Visit Jersey's work

30.3^M



First time visitors (holiday & leisure)

+ 52%



Total visitors 5% above 2016

+ 726,809



UK Facebook

+ 7%



Referrals for our commercial partners

+ 750,000



Twitter

+ 7%



Instagram

+ 32%



Introduction

The States of Jersey Government is committed to promoting increased tourism to Jersey, and a strong and thriving visitor economy creates jobs, generates economic growth for the island and helps make Jersey a better place to live.

Visit Jersey has had a strong year; they ran world class seasonal marketing campaigns and launched an exciting new Product Strategy to help make sure the experiences our visitors receive deliver long-lasting memories.

I am especially pleased to see islanders getting behind Visit Jersey. So many gave their time to be featured as island ambassadors. More people are coming to Jersey; over 726,000 visited the island in 2017, spending £250.2 million which delivered £12.5 million of GST.

Success in our tourism and hospitality sector is predicated on the hard work of so many people, both from the public and private sectors. I would like to take this opportunity to thank them all.

Visit Jersey has entered its fourth year of operations and continues to meet challenging targets. I look forward to supporting their, and the industry's efforts to build a vibrant and sustainable visitor economy into the future.

Senator Lyndon Farnham
4th April 2017

Chairman's Foreword

The recovery of our Island's tourism sector continued in 2017 as we welcomed 727,000 visitors to Jersey who went on to spend £250 million in our economy. Of the total visitors, 413,000 were staying on holiday, which was the best for a decade. In the second half of the year (where there was a consistent measurement basis) the number of visitors staying in major forms of accommodation was up 18% whilst the number of visitor nights increased by 6% reflecting the shortening stays. Without the 27% reduction in day trips representing some 41,000 visitors we would have easily exceeded our target of 749,000 visitors set in the 2015 destination plan. A further reminder of a simple but important fact, without ways to get to Jersey our marketing efforts will be wasted.

Kevin Keen,
Chairman of Visit Jersey
18th April 2017

In 2017 substantial effort was made to promote the many things visitors can enjoy when coming to Jersey (which we call product) that make their stay even more memorable and encouraging visitors to be advocates of #TheIslandBreak. Probably the most significant new "product" in 2017 and one that shows huge promise was The Super League Triathlon, which we are delighted will be returning in 2018 and beyond. Of course local residents also benefit from new and existing product enjoyed by visitors. From Jersey Zoo to great restaurants, from our rich heritage assets to incredible experiences like a journey to Les Minquiers by RIB. Jersey has so much to offer in a convenient and safe location.

The States of Jersey invested taxpayers' money totalling £5.1 million for the year, of which £200,000 was to support the establishment of Events Jersey and the development of events led tourism. The vast majority of the remaining £4.9 million was spent marketing the Island as an all-year-round tourist destination. Each marketing campaign is carefully evaluated for value for money to ensure that the Island's investment is being deployed to greatest effect, which is wholly appropriate and a matter of great pride for the team. In addition to those measures there was course the £250 million of what are effectively export earnings (including an estimated £12.5 million of GST) which further confirms the wisdom of ongoing States support for an industry that provides so many benefits to our community

During 2017, Tourism Economics published their report on the economic contribution of tourism to Jersey and the opportunity for greater productivity. For the first time we saw the full impact of tourism on our economy showing that when indirect and induced impacts were taken into account, tourism accounted for 8.3% of Gross Value Added and 12.6% of all jobs. They also confirmed the opportunity for greater productivity by building visitor numbers in the shoulder months, as even with the improvements in marketing, only two-thirds of available rooms were sold in 2017, demonstrating the potential for more visitors without more hotel rooms. We very much hope that the recovery will encourage more investment capacity in addition to the very welcome opening of the Premier Inn this year. Confidence to invest by the private sector will be dependent though on joined up policies from Government that do not encourage on one hand but seem to punish with the other. An opportunity for Government to demonstrate this joined up approach will be the

Our Role

Visit Jersey began trading on 30th March 2015. Our role is to promote tourism to and within Jersey in an innovative, economic and efficient way, delivering on our vision of a vibrant and sustainable tourism industry. Over the longer term our priorities are to:

- Inspire visitors from overseas to visit and explore Jersey
- Maximise public investment through partner engagement, and
- Advise government and the industry on tourism issues, particularly those affecting our competitiveness.

Our vision is to help the world fall in love with Jersey and our mission is to 'Champion Tourism' and 'Tell Great Stories'.

2017 was a busy year for Visit Jersey as we set about creating seasonal marketing campaigns and developed a strong product strategy. These efforts were directed at helping to address the 21 recommendations detailed in the Jersey Destination Plan. It was a year of substantial achievements across a wide range of areas.

Jersey welcomed 413,200 people for a staying holiday to our amazing island during 2017. This was the third year of growth - the best since 2007 - and beat our 2017 target of 373,800 staying holiday visitors. More first time holiday makers are coming. We are encouraged that 52% of those visiting for holiday or leisure purposes said that this was their first visit to Jersey. Historically, this figure was slightly less than 50%.

Total visitors (which includes day trips, visiting friends and relatives, and business travellers) were 726,809, 5% above 2016 and 3% below the 749,000 target for total visitors. Staying business visitors at 57,677 were down by 5,323 (-18%). 65% of visits in 2017 were from the UK, France accounted for 18%, Guernsey was 5% and Germany 3%. The total spend from all our visitors was £250.2 million, up 10% on the previous year.

Marketing Trade and Product Activity

There are three broad strands to our activities; marketing, trade and product. Jersey is competing in the global tourism economy and we aim to ensure our efforts are of the highest order. Executives presented at a number of conferences including at World Travel Market and at the Digital Tourism Think Tank's Global event - 'Aligning Audiences with Brands'.

Marketing

In 2016 we launched a new brand for Jersey. During 2017 we rolled out winter, summer and autumn marketing campaigns. We also ran several marketing initiatives focused on one-off opportunities such as broadcasting adverts featuring one of our island ambassadors, Gordon Hunt, the Head Ape Keeper at Jersey Zoo on the ITV hub, Twitter and Facebook timed around the popular ITV series 'The Durrells'. All this marketing activity in 2017 generated a little over 750,000 referrals for our commercial partners.

Keith Beecham
CEO, Visit Jersey
18th April 2017



**We play the role of
trusted advisor, sharing
the voice of the customer,
so our visitors leave with
lasting memories.**



Our Operating Environment 2017

2017 echoed 2016 as uncertainty remained widespread in both the political and business environments. Brexit moved sluggishly forward, Trump continued to hog the headlines, exchange rates yoyo-ed and acts of violence were witnessed across the world's metropolitan centres. Inflation started to creep back up, UK real disposable incomes saw some growth and The Bank of England base rate increased to 0.50%. Despite this, people kept travelling; 2017 was a strong year for global tourism across many parts of the globe.

The Jersey Destination Plan, published in the autumn of 2015, sets out how collectively our island's tourism businesses and other parties can capitalise on the tourism opportunity. This Plan remains the overarching document that sets out how we can work together to build a vibrant and sustainable tourism industry. The success of our visitor economy depends upon action on both the supply and demand side and the Plan lists twenty one recommendations. Good progress has been made in responding to these recommendations but there is still a lot to do.

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 three 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 and 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. Visit Jersey 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 innovative, 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-led 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

‘Remarkable’

is the word that the United Nations World Tourism Organisation has used to describe the 7% growth rate for international tourism seen in 2017, taking the global tally of visits up to 1.322 billion, meaning that roughly one-third more international trips were made last year than just six years earlier. Still keen on the superlatives, UNWTO noted that Europe’s growth rate of 8% was ‘extraordinary’ for such a mature tourism destination.



These stats go some way to underlining just how important tourism is to economies right around the world and according to the World Travel and Tourism Council, 10.2% of global GDP is now accounted for by travel and tourism once one takes account of its indirect and induced impacts, supporting 108.7 million jobs worldwide.

Of course one of the buzzwords for those interested in tourism that came to the fore in 2017 was 'overtourism' – a phenomenon most acute in places such as Venice and Barcelona, whereby there is a perception that an imbalance exists between the expectations of visitors and the needs of local residents. WTTC analysis suggests that long-term planning for sustainable tourism growth is key for destinations, ensuring that commercial, public and social considerations all are accommodated.

It is argued that preventing 'overtourism' before it occurs is much simpler than dealing with it once it is a reality, and this is best done by devising ways of encouraging both the spatial and seasonal spread of visitors.

Jersey does not have any 'overtourism' issues. The island has enjoyed four straight years of growth in the numbers choosing to visit for a holiday, but numbers remain around 30% down on where they were a quarter of a century ago.

Cognisant of the needs to ensure tourism grows in a sustainable fashion in Jersey, Visit Jersey has been working to maintain the healthy volumes we see in summer, but to focus on growing volumes in the shoulder seasons by running campaigns that reflect the many benefits of a visit in autumn, spring or indeed winter.

One of the foundations of growth in global tourism is a strong global economy, and many have been surprised by how well most economies performed in the past year, making it one of the strongest since before the global financial crisis. While the jury is still well and truly out on what the long-term implications of Brexit will be for the UK economy, in 2017 at least it continued to outperform expectations, and the Bank of England has signalled that following on from the November 2017 hike in base rates, two more such increases are on the cards before the close of 2018.

Another enabler of tourism is of course energy supplies, and here the story for 2017 was for a gradual uptick in the price of oil, taking it to its highest for around three years. As yet this has not led to carriers hiking fares but, as we head into 2018, it is no doubt one of the challenges facing operators whose balance sheet is not as strong as others.

Visit Jersey has been working to maintain the healthy volumes we see in summer, but to focus on growing volumes in the shoulder seasons by running campaigns that reflect the many benefits of a visit in autumn, spring or indeed winter.

How Do We Measure The Difference We Make?

Visitors come to Jersey for a host of different reasons, some of which are influenced by Visit Jersey's activities, some of which are not.

Recognising this fact, and being hungry to understand how effective each of our interventions are, Visit Jersey ensures that it can measure the effectiveness of its activities through the deployment of an evaluation methodology that is widely adopted by tourist boards, has been rubber-stamped by the UK National Audit Office, and that mirrors the UK Government Communications Service 'Standards and Guidelines'.

Historically many marketing organisations only talked about the 'outputs' of their activity, for example how many visitors there were to a website, or how many brochures were posted from a mailing warehouse. While these are important metrics they do not help us understand whether what we are doing is delivering on its ultimate goal, namely increasing the number of people who choose Jersey as a holiday destination who, without us having intervened, would not have done so.

In broad terms our approach to measurement and evaluation requires us to ask a sample of those who come into contact with each of our activities about the impact that it had on them.

This ranges from questions about how it made them feel (what we call 'outtakes'), what they did after interacting with our activities (intermediate outcomes), and crucially whether or not it turned a possible trip to Jersey into a certainty (final outcomes).

We always take a cautious approach to ensure we do not overclaim. For example, making sure that we do not count anyone as having been influenced by our activities if they do not recall the activity, or had already committed to a trip before they became aware of the activity, and by giving them the opportunity to tell us about the scale of influence, ranging from it having 'definitely' played a role to its impact having been 'none at all'.

The following diagram describes some of the key steps in evaluating our activities.



New in 2017 - Product Strategy

In December 2017, Visit Jersey launched our product strategy. We play the role of trusted advisor, sharing the voice of the customer, acting as facilitator, identifying and presenting the opportunity for the industry. Our role is to guide what good looks like as product guardians so our visitors leave with lasting memories.

The product strategy will:

- Lead, influence and manage all the aspects of Jersey that contribute to the visitor's experience.
- Take into account the needs of visitors, local stakeholders and the environment.
- Define the development needs and opportunities for the island following an evidence-based approach.
- Serve as a shared statement of intent to achieve our ambition of reaching 1 million visitors before 2030, spending £500m per annum.
- Identify the key pillars of product development, informed through consultation.
- Outline stakeholder roles and suggested actions.

We want to mobilise 'Team Jersey' to help foster a forward-looking view, continually driving product improvement. Through a partnership-led approach, we will raise productivity by developing a year-round visitor economy.

'Improving the Visitor Experience' & 'Product Audit'

Key Conclusions

Background

During 2017 Visit Jersey undertook two substantial projects to help in the development of a Product Strategy with each piece of research undertaken by independent expert agencies. Kantar TNS and Island Global Research conducted a nine-month project which entailed interviewing leisure visitors to Jersey to explore their experience across a range of key 'touch-points' with a particular focus on how the experience stacked up against that available in other parts of the British Isles.

Colliers International conducted an audit of the tourism products and services available in Jersey and how these relate to what is to be found in other, selected, geographies within the British Isles. This project also included interviews with a small number of individuals from across Jersey's visitor economy.

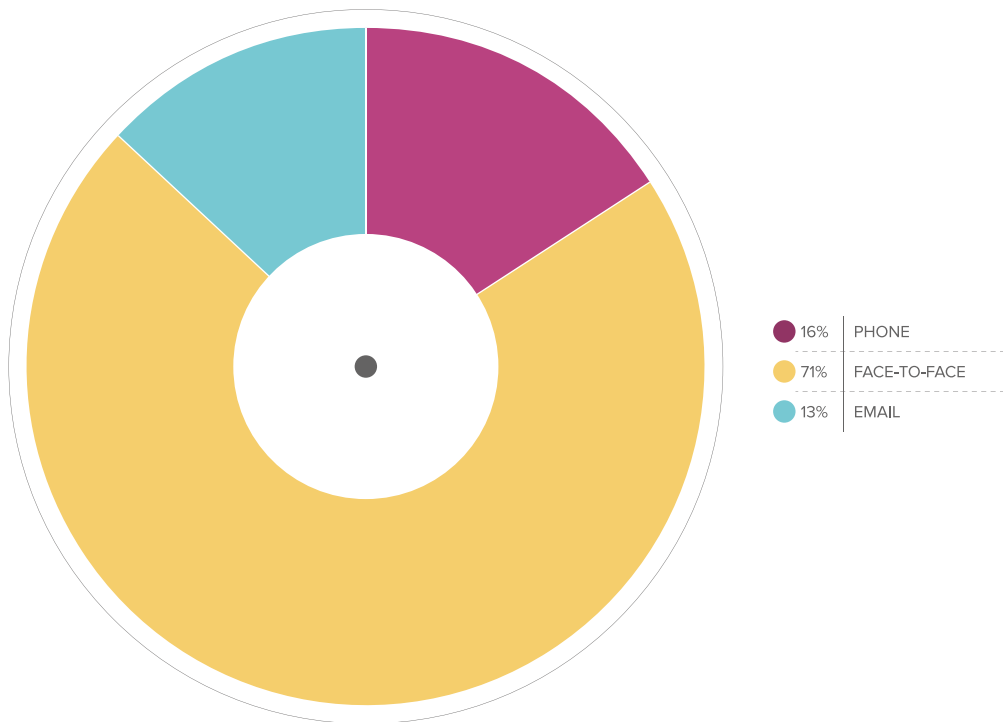
**The experience
advantage: the
product is what
you buy, an
experience is
what you
remember.**



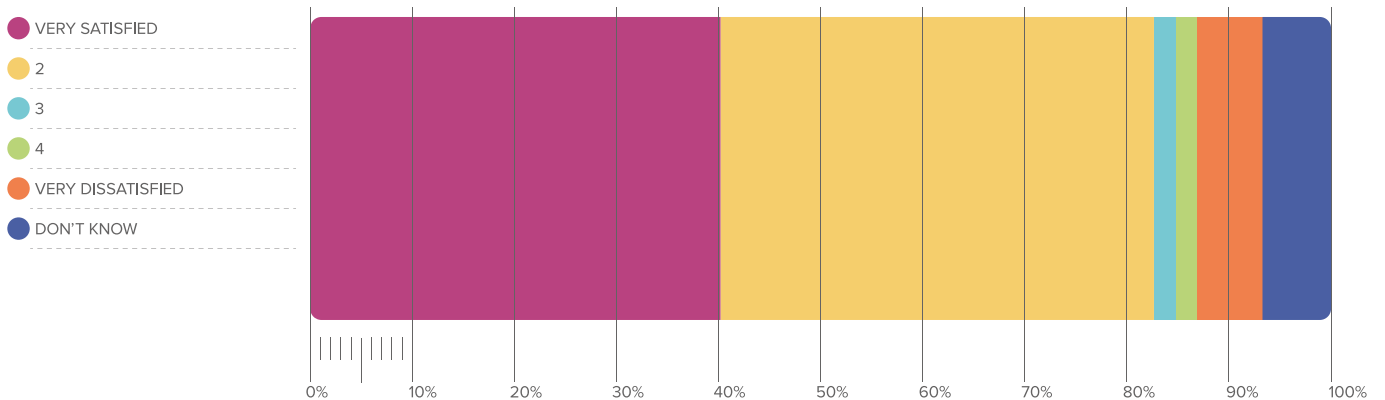
Tourist Information

During 2017 Visit Jersey sought to update and strengthen the current existing vision for on-island provision of information, and align with current European best practice. We aim to create a setting that puts visitor engagement at the core, by combining both traditional service encounters with the latest interactive technologies.

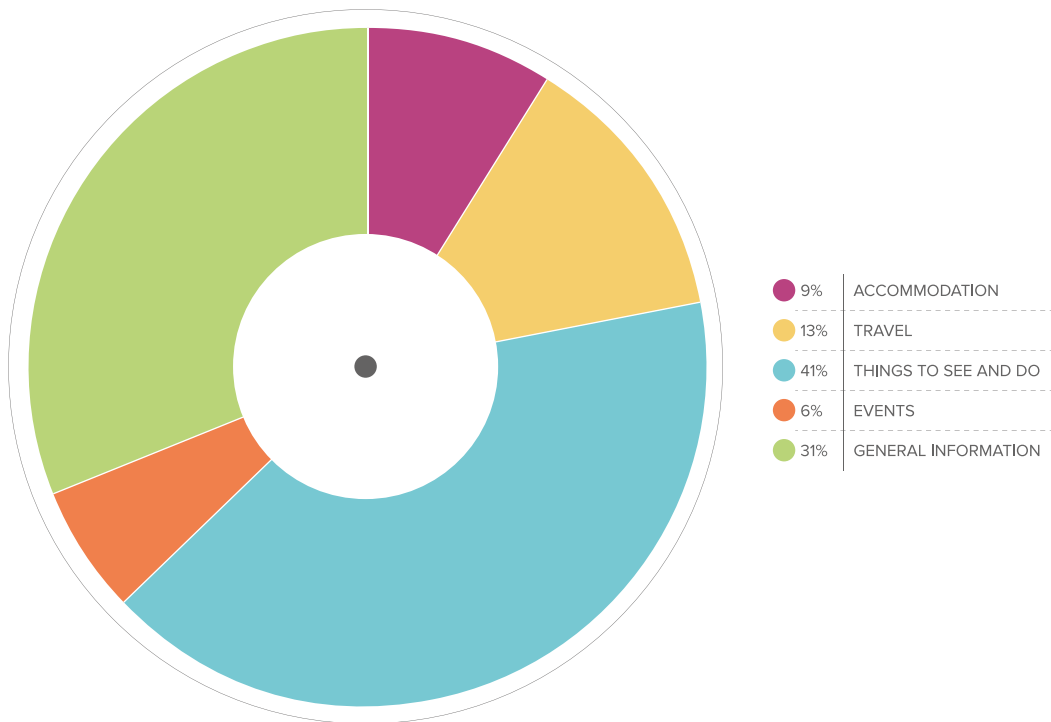
Form of Enquiry



Satisfaction with the Tourist Information Centre



Nature of Enquiry



Insights

Research has highlighted that Tourist Information Centres are more about experiences in the TIC than a desk with free information. Visitors are looking for a personalised service that makes them feel like a special guest for a couple of minutes. Different visitors have different information needs depending on the length of their stay, how they plan to travel around the island, their knowledge of English and whether they have visited the island before. Some visitors will want specific information, while others may simply be seeking inspiration.

Over the past 18 months Visit Jersey has undertaken a number of studies in the UK, France and Germany to help us understand the visitor information needs that tourists have once they have arrived at their destination. We have also undertaken research within the current TIC to explore the types of information that are used while in Jersey.

Key outtakes on-island

- The majority of TIC users were making their first visit to the TIC and were using it early in their stay
- Virtually no users had wanted to use the TIC at a time when it was closed
- There were three core reasons for using the TIC:
 - (1) to pick up maps or guides,
 - (2) to ask specific questions and
 - (3) to ask for general advice
- 89% of visitors were satisfied with the service provided by the TIC
- 91% of visitor needs are currently being met with information provision
- The most used forms of visitor information since arrival in Jersey were What's On and the Official Visitor Map

Key outtakes off-island

- Our research sought to discover 'what good looks like' when it comes to visitor information provision once at the destination.
- Only 23% of British visitors used a TIC on their last domestic holiday, with the most popular ways of accessing visitor information being internet searches and review sites such as TripAdvisor
 - At 37%, the French are more likely to use a TIC, with a greater number wanting 'general advice'
 - Expectations for what a TIC should provide suggested that 'practical information', 'brochures on things to do locally', 'advice on what to do' and 'free local maps' were considered 'essential'
 - The preferred location for a TIC was in a dedicated building within the area most frequently visited by tourists
 - There is a very strong preference for face-to-face interaction in order to get genuine local insight and advice
 - Research in Germany confirmed the desire to get local advice and recommendations from a TIC, with advice on places to eat seen as important as well as what to see and do and to access free local maps
 - German visitors consider it very important that a TIC has friendly and welcoming staff who are empowered to provide advice and recommendations

What are visitors looking for?

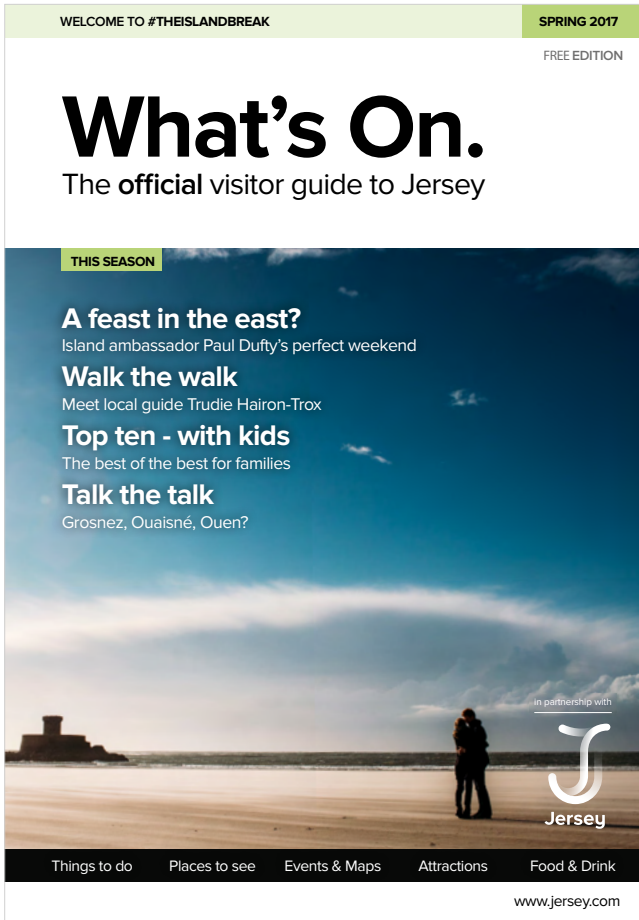
- A personalised service, that makes the visitor feel like a special guest for a couple of minutes
- Visitors consider it is very important that a TIC has friendly and welcoming staff who are empowered to provide advice and recommendations
- There is a very strong preference for face-to-face interaction in order to get genuine local insight and advice
- Enthusiastic and knowledgeable staff
- Staff who move around the TIC and provide information and advice at a location that suits the visitor

Conclusion

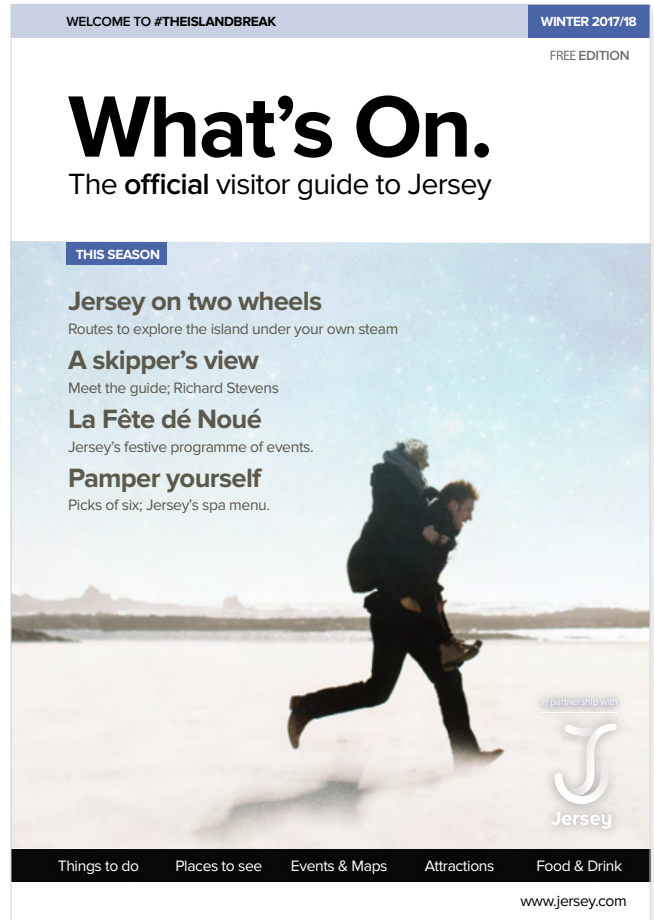
Following a tender process which was supported by an independent advisor, Visit Jersey appointed Liberty Bus to provide on-island Information Provision at the Tourist Information Centre within Liberation Station. The agreement comes into effect on the 16th April 2018 and is for a period of 44 months to 31st December 2021.

This new partnership provides the platform to drive and devise an innovative and engaging TIC proposition now and into the future beyond 2020. The partnership brings together two organisations that have a shared vision to support the Jersey Destination Plan's ambitions for growth, improve our image, and deliver a great welcome for our visitor.

Visit Jersey would like to take this opportunity to thank the current providers, Jersey Heritage for providing the location of the TIC within Jersey Museum since February 2016 and Ports of Jersey for providing the front of house staff.



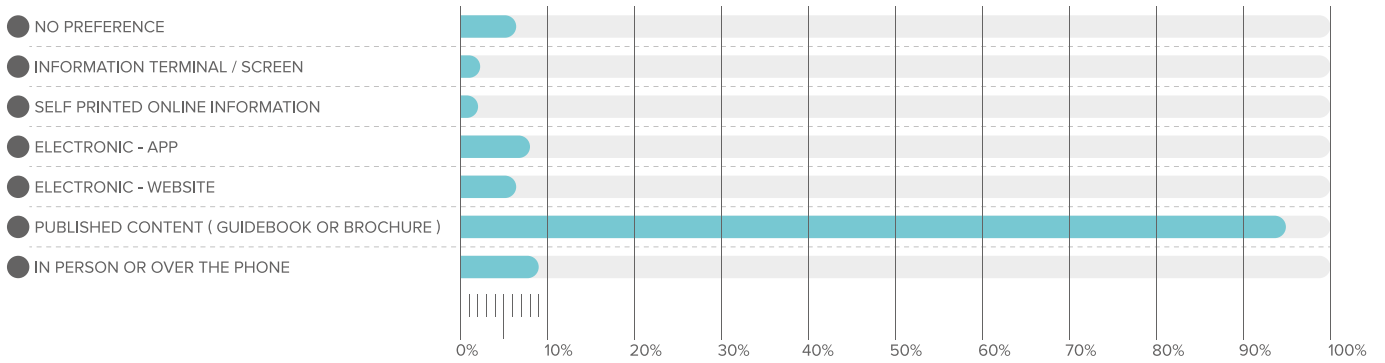
What's On Guide & Official Visitor Map



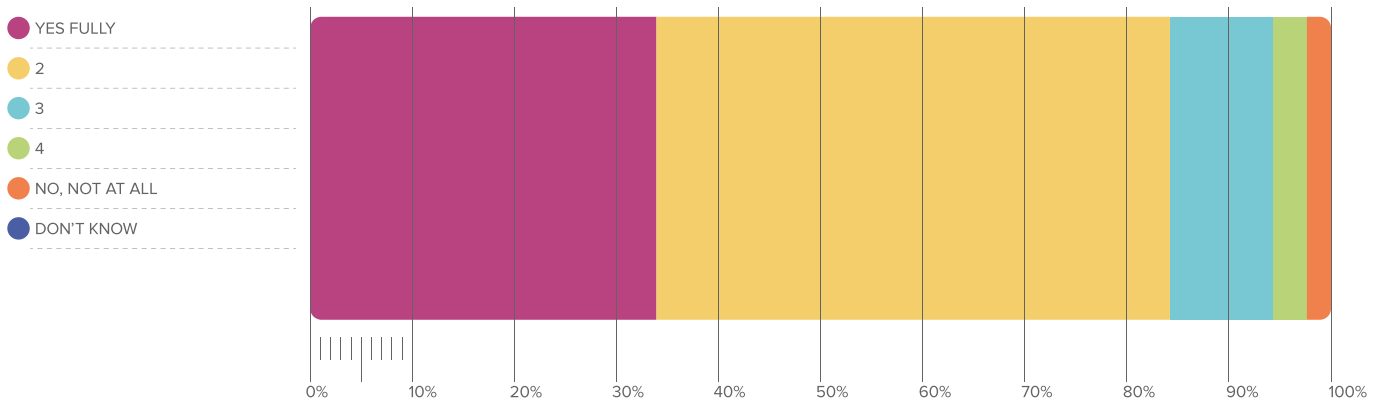
In 2017 following a rigorous selection process, supported by an independent assessor, Visit Jersey appointed Jersey-based publishing house Factory to produce and distribute the What's On guide and Channel Island Maps to produce and distribute The Official Visitor Map.

Both What's On and The Official Visitor Map help visitors to our island get the most out of their stay, with suggestions on what to see and do. It is vital that once visitors step off the ferry or plane they are quickly able to obtain information that will help them plan they stay and make the most of #theislandbreak, inspiring them to explore Jersey's culture, attractions, heritage and local produce.

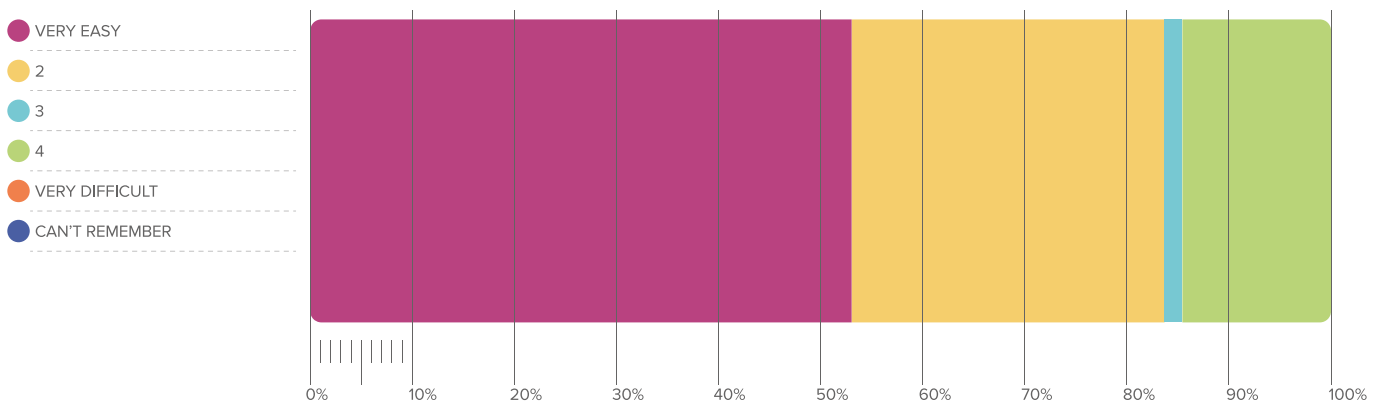
Preference for how to access maps



Did the official map of Jersey meet your needs?



Ease of Using What's On Guide?









Supporting our Industry Trade - UK and Germany

Formulating partnerships to generate growth

During 2017 our key trade goal was to identify gaps in existing markets and develop new trade relationships to grow Jersey's visitor volume.

To achieve this we implemented a number of initiatives to showcase the tourism opportunity, help educate partners about the destination, and change perceptions to help bring Jersey to life. These included:

- Educational trips organised for 17 trade partners to visit Jersey, around on-island events such as the Jersey Style Awards, Super League Triathlon, Jersey Marathon and Jersey Reds Rugby matches. Our aim was to attract new tour operators to experience the island.
- Product development discussions held with partners who were planning to add Jersey as a new destination to their portfolio or were looking to expand their Jersey programme. Partners included Study Experiences, Ramblers Worldwide, Health and Fitness Travel, Sanctuary Spa Holidays.
- New Jersey product was added to the portfolios of Zenith Holidays and Voyage Privé; resulting from educational visits they attended.
- We organised and planned the following agent trips bringing a total of 100 agents to experience the island break:
 - Premier Holidays Travel Agent Fam Trip – 21-23 March 2017
 - Premier Holidays Mega Fam – 25-28 April 2017
 - Sunair Fam Trip – 11-13 April 2017
 - DSL FAM Trip – 19-21 April 2017
 - Sunair Press Trip - De betere wereld – 26-28 April 2017
 - Sunair Press Trip - Telegraaf Reiskrant – 10-13 May 2017
 - Premier Holidays Co-op Travel Top sellers FAM – 18-20 October 2017

During the year discussions were held with 109 existing and potential trade partners to explore opportunities for Jersey product to be added or expanded in their programmes. Visit Jersey co-funded marketing activity with partners to achieve incremental growth in visitor numbers. Joint marketing campaigns were delivered with over 14 key trade partners promoting Jersey through various channels.

Trade Events

We exhibited at trade events to ensure Jersey and our on-island partners had a platform to present their offers and meet with industry partners. In addition, we organised several bespoke events for travel agents and trade partners where we showcased the island.

- A tour operator breakfast forum was organised to tell the Jersey story to 20 UK product managers.
 - Jersey was represented at the Selling Travel Agents Choice Awards Event in London on 2nd October. Speed-dating-style training took place with travel agents. Jersey secured a place as a finalist in the 'Best Beach Destination' category.
 - The inaugural Visit Jersey sales mission event for product managers was held in London on 2nd October. Hotel suppliers were invited and we targeted new tour operators. The event attracted nine key tour operator partners.
 - Visit Jersey attended a number of travel events and met with tour operators.
 - UKInbound – 17 meetings – mainly UK based partners.
 - Explore GB – 42 meetings – various UK, Dutch and Scandinavian partners. This resulted in Pharos Reizen adding Jersey to their programme and a number of other tour operators identifying Jersey as a future opportunity
 - ITB Berlin
 - Routes Worldwide in Barcelona
 - World Travel Market - exhibited on the UKInbound stand.
-

Product Initiatives

Partnership programme

- Our three-tiered supplier partnership programme helps suppliers on-island amplify their profile through Visit Jersey's consumer marketing channels.
- The programme evolved in 2017 to include attractions and activity providers and currently has 26 partners subscribed at a gold/silver tier.
- In 2017, we launched the Partner Dashboard setting out referral targets.
- Over 250 partner meetings held.

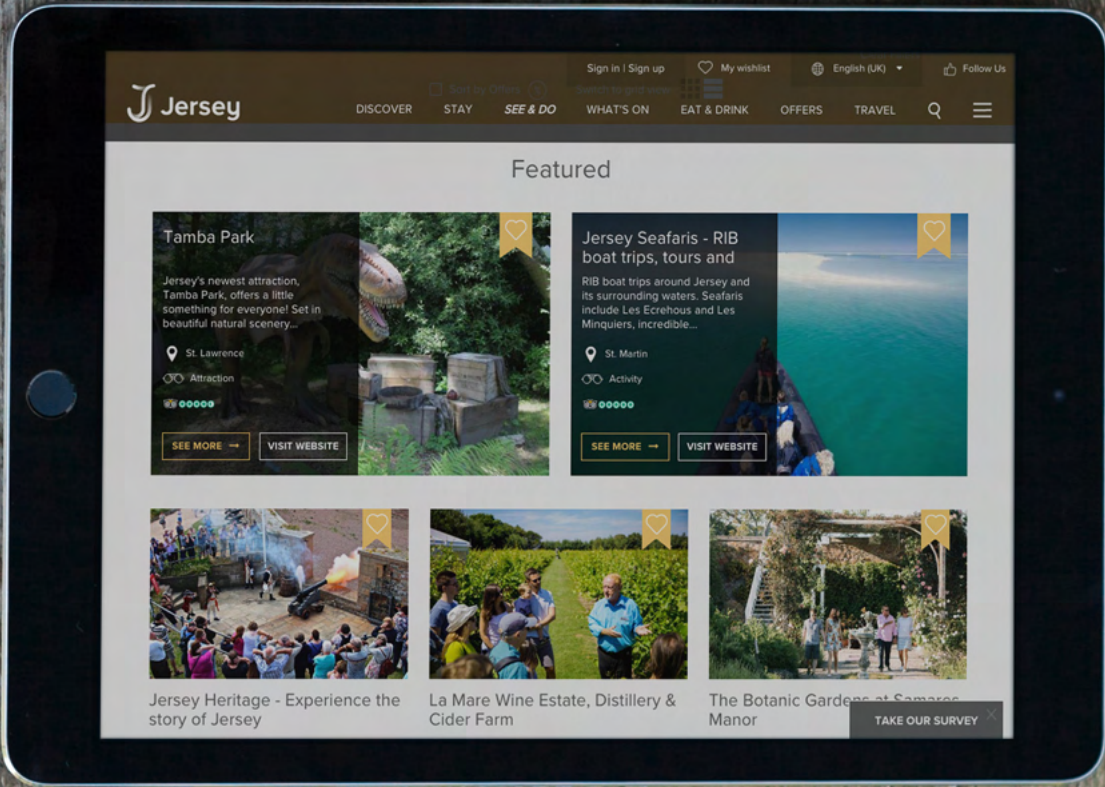
For more information:

<https://business.jersey.com/supplier-partnership-programme>

“Having real-time referral information from our Visit Jersey dashboard, in a concise and easily, understandable format has been of great benefit.

Particularly in the fact we can now track how our campaigns have been performing with Visit Jersey.”

Andrew Shrimpton, Director,
Dolan Hotels



Featured

Tamba Park

Jersey's newest attraction, Tamba Park, offers a little something for everyone! Set in beautiful natural scenery...

St. Lawrence

Attraction

SEE MORE VISIT WEBSITE

Jersey Seafaris - RIB boat trips, tours and

RIB boat trips around Jersey and its surrounding waters. Seafaris include Les Ecrehous and Les Minquiers, incredible...

St. Martin

Activity

SEE MORE VISIT WEBSITE



Jersey Heritage - Experience the story of Jersey



La Mare Wine Estate, Distillery & Cider Farm



The Botanic Gardens at Samson Manor

TAKE OUR SURVEY

MyListing Portal

- Visit Jersey provides free listings on the website to all accommodation providers, attractions, event organisers, restaurants, cafés, bars, retailers, tour guides and operators.
- All of our marketing activity – from social, digital, press and print media – drives potential visitors to jersey.com to ensure that businesses buying and selling Jersey receive as many referrals as possible from their listing on the website.
- Over 1,700 listings were updated in 2017 – which translated into almost 603,000 direct referrals to partners who use the MyListing Portal to promote their business and activities.
- New developments were rolled out to the MyListing portal in November. The upgrades included video content in both the listing header and gallery, new image gallery and partner-branded offer carousels, bus route information and a number of event detail options.
- Weekly My Listing Tutorial sessions were delivered to partners focused on educating and informing the industry on the opportunities presented by jersey.com

Industry engagement

- Our trade and corporate website was launched in January 2017 presenting a platform for distributing the island break to partners on and off-island. Content includes product, marketing and trade opportunities, research and statistics and latest news and industry updates. Regular industry communications are shared via the bi-weekly industry newsletter and trade Twitter and LinkedIn channels.
- Key events provided a platform for product to inspire tour operators to consider selling short stay breaks to Jersey in the shoulder months. Hospitality and FAM trips were hosted specialising in luxury for the Jersey Style Awards and sports/active product arranged as part of the Super League Triathlon and the Jersey Marathon.
- The Institute of Place Management (IPM) ran a workshop at The Radisson Blu on 9th November 2017 with 39 retail stakeholders in attendance. The workshop reviewed the evidence available about St. Helier's town centre performance and compared that with the British Isles, with a focus on towns with similar characteristics to St. Helier. The IPM then worked with stakeholders attending the workshop to develop an understanding of possible existing challenges and future options for the town.
- Presented at the Expedia event on Destination Decision Making to 30 on-island partners sharing prospective visitors' looking and booking behavioural influences.

Front of house training

The pride and passion of our islanders is an opportunity to inspire even more visitors to discover Jersey. We provided training to front of house hotel teams on how to use jersey.com to share visitor information about our key experiences.

“It is essential for all front of house members of staff to be able to source information about Jersey, be it booking restaurants or recommending a walk; this not only means providing excellent service, but it also promotes the island by guiding the guests to discover new places and activities.

The training provided allows us to confidently find and deliver the information (*which isn't always easy as most staff members are not from the island*) all while encouraging customers to navigate the website themselves to start exploring all that Jersey has to offer.”

Daniela Corasaniti, Sales Manager,
Longueville Manor

To align with the launch of the autumn campaign, the product team curated unique experiences and suggested autumn escape itineraries as part of the trade marketing toolkit. Partners were encouraged to share them in customer communications and with front of house teams as well as including them in 'welcome packs' to inspire visitors to experience the island break.

Jersey Attractions Group

Product is working closely with the Jersey Attractions Group attending regular meetings/sub-committees and presenting opportunities for collaboration. These include inviting the group to share their thoughts on the new for 2017 Attraction/Activity Partnership Programme.

Visitor Guides

- Following research done by Visit Jersey in summer 2017, we developed French and German visitor guides.
- We developed new advanced cycle routes, allowing individuals, groups and teams the opportunity to download and watch videos of some of Jersey's key cycling routes prior to their visit.

Cultural strategy contribution

We responded to the States of Jersey Cultural Consultation outlining opportunities for cultural tourism development.

2017

- Worked with Visit Guernsey to create the Channel Islands Heritage Festival programme, incorporating over 400 events, guided tours and self-guided walks and activities across all the islands over 33 days.
- Collaborated with on-island partners to pull together a comprehensive programme of themed events and activities of Heroes, Myths & Legends.



Events Jersey

In 2017, Events Jersey attended the following trade events to present the island as 'open for business' to attract consumer and business events to Jersey. These included:

- Confex International
- ANTOR
- BNC Meetings Show
- IMEX
- Host Glasgow with Sports Jersey
- IBTM Barcelona



Events Case Study:



Super League Triathlon



14 15 16 17 18 19 20 21 22

Events Case Study:

Super League Triathlon

Super League Triathlon (SLT) is a spectator-friendly race series which gives triathlon fans an action-packed and very up-close experience. Fans can follow the best triathletes in the world from start to finish, as the series travels to some of the world's most spectacular racing destinations throughout the eight-month race season.

SLT burst on to the world's stage debuting in Hamilton Island, Australia in 2016 with a potential global TV reach of over 300 million. Super League races are focused on attracting a new generation of audiences with the aim of fostering and inspiring future champions and promoting a healthy lifestyle for the wider community.

From the moment that Jersey won the right to host in 2017, our intention was not just to promote the SLT week in Jersey, but encourage the world to fall in love with Jersey by making full use of the opportunities to promote the island break.

Jersey is proud to partner with SLT and we shared our island with the rest of the world. Whether part of the media team, a participating athlete or a visiting fan, we welcomed many new friends to our island, and relish the opportunity to build a SLT legacy.

The partnership places Jersey on the map as a host for international sports events.

The value of SLT to #theislandbreak

SLT provides a catalyst for the island's tourism development. The event provides Jersey with:

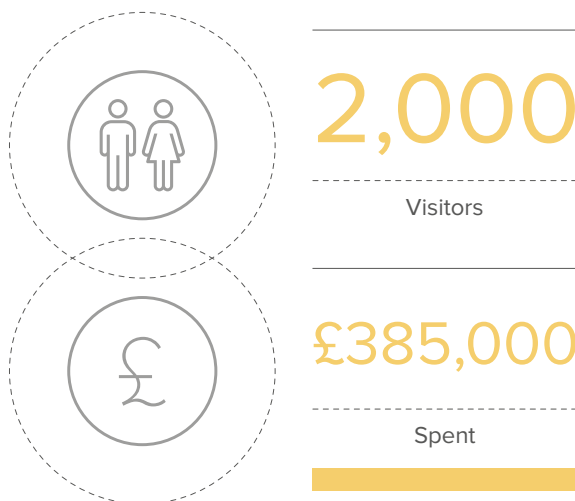
- The opportunity to showcase the island's event capabilities and credentials.
- A pitch to showcase the island break welcome, promoting the wider messages and interests of Jersey.
- A platform from which Jersey can inspire other sporting events rights owners to consider the island for their next event.

Research indicated that 2,000 visitors spectated at Super League Triathlon. Research found that 28% of visitor spectators said they came specially for the event and for a further 6%, it was an important factor in their decision to visit. In total, 630 visits were attributable to the SLT and a further 1,400 who were visiting Jersey chose to watch the event.

The estimated additional visitor expenditure directly attributable to SLT is at least £385,000. The propensity for visitors who came to the island to experience SLT to recommend Jersey as a visitor destination was high.

SLT presents opportunities to promote Jersey before, during and after reaching new visitors in target markets and reignite the island's appeal. The event complements the core portfolio of Jersey's sporting events including the International Brea Swimrun, Balls of Steel, Jersey Triathlon, Round the Rock, Jersey Marathon, Sandstorm Jersey and Jersey Rugby Football Club who compete in the RFU Championship.

SLT provides a catalyst for tourism on two levels – building the aspiration to travel to Jersey, and increasing the number of people visiting the island.



“... thank you for your hospitality, it was my first visit to Jersey and I really enjoyed my time – it really is paradise. The Super League Triathlon was a great event and I really enjoyed it. I visited the Jersey War Tunnels on Monday which I found so interesting and would highly recommend to anyone visiting.”

Paul Joseph
Health & Fitness Company

Digital

The event provided opportunities for marketing through Visit Jersey's consumer marketing channels including a dedicated feature and event listing on jersey.com, e-news to 200,000+ recipients, social media and PR.

Reaching out through Visit Jersey's social channels (62,000 Facebook, 15,400 Twitter, 8,000 Instagram), Visit Jersey extensively promoted the event in the lead up to and during the event. As part of content outreach, athletes experienced Jersey from sunrise to sunset. Visit Jersey showcased all the island has to offer from East to West, incorporating signature experiences. The athletes were encouraged to share their experiences using #theislandbreak.

The athlete immersion days enabled Visit Jersey to present the athletes' live Instagram stories of their Jersey experiences. Independently the athletes shared their visits via Instagram, blogs and tweets. Jersey provides a unique and beautiful location alongside an enthusiastic welcome and a digital infrastructure, providing the opportunity to generate extensive coverage worldwide.

Media & PR

Over 40 international media visited Jersey as well as specialist sporting media in 2017. The SLT was broadcast to 147 countries, posted approximately 250 videos on social media and over 400 posts of written content, growing engagement by 40% overall. An average of over 625,000 viewers per minute caught the 10-hour live race coverage on their screens. The media output has created momentum for the sport and SLT have a following that is loyal, fierce and dedicated. Visit Jersey leveraged this through English and French media engagement.

Travel Trade

Visit Jersey used SLT to inspire new tour operators to consider selling Jersey and helping us reach the short-stay market in the shoulder seasons. Visit Jersey hosted tour operators on a familiarisation visit and showcased the island as a sporting/adventure destination. Companies included the Health & Fitness Travel Company, Voyage Privé and Zenith Holidays. Visit Jersey was able to share inspirational product for the tour operators to build into potential new programmes.

Generating Consumer Demand



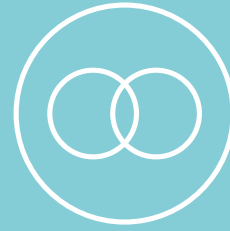


Marketing Strategy



Bring brand Jersey to life

Leverage our new brand proposition to tell our island story that connects visitors to an emotive experience.



Align best prospects to best channel

Right people, right place, right time, right message.




Capture, create & nurture visitor intimacy

Activate and engage visitors through relevant, breath-taking and personalised content.



Partner with the industry

Work with our partners to better distribute brand Jersey and generate sales.

 Jersey

DISCOVER STAY SEE & DO WHAT'S ON [Sign in](#) | [Sign up](#)

Campaigns



During 2017 we rolled out seasonal marketing campaigns across the UK and France. We also ran several marketing initiatives focused on one-off opportunities. Our media activity concentrated on aligning our best prospects to best channel, using a variety of networks that specialise in high engagement, while serving our content in the right environments. A combination of creative rich video and destination advertorial generated brand awareness, engagement and ultimately conversion to a partner.

Media Partners

BRITISH AIRWAYS 

 Expedia

EveningStandard.

secret Escapes



TimeOut

YouTube

itv

TRAVELZOO

Teads^{tv}

Silence.

The Telegraph

THE  TIMES

(SUPER BREAK)

Winter Campaign | UK



Come alive this winter

Evaluation

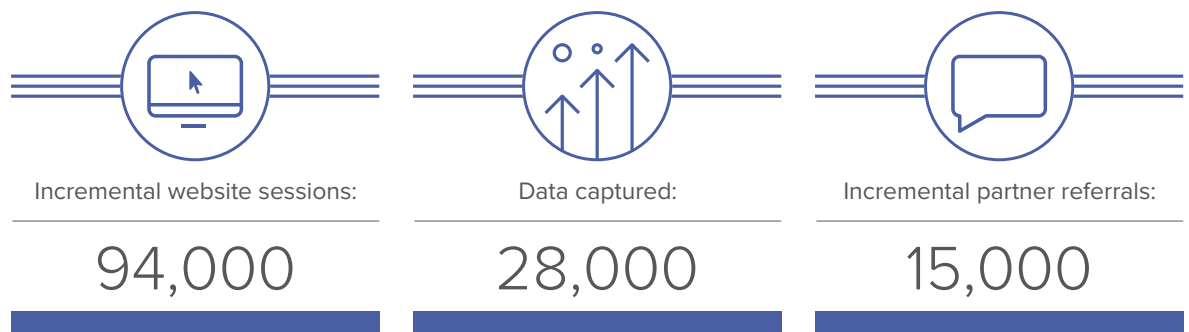
The Visit Jersey 2017 winter campaign “Come alive this winter” supported our long-term strategy of attracting more visitors to Jersey through the shoulder season. The campaign told the story of ‘72 hours in Jersey’ using video and breathtaking imagery depicting natural landscapes, wellness experiences and everything the island break has to offer for a short break. The advertising campaign used digital display, interactive digital units and social

advertising to drive traffic to the campaign landing page housed on jersey.com. This provided a platform to refer potential visitors to our partners.

This campaign ran from 1st January to the 28th February 2017.

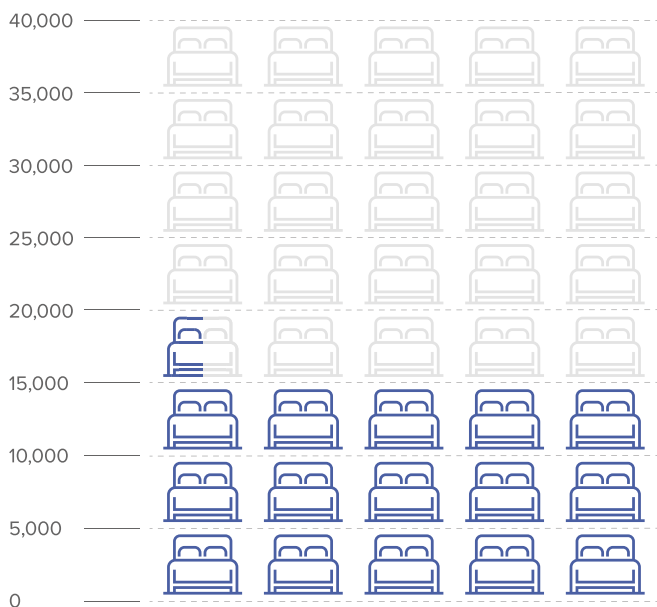
For more information: www.jersey.com/come-alive-winter

Outputs



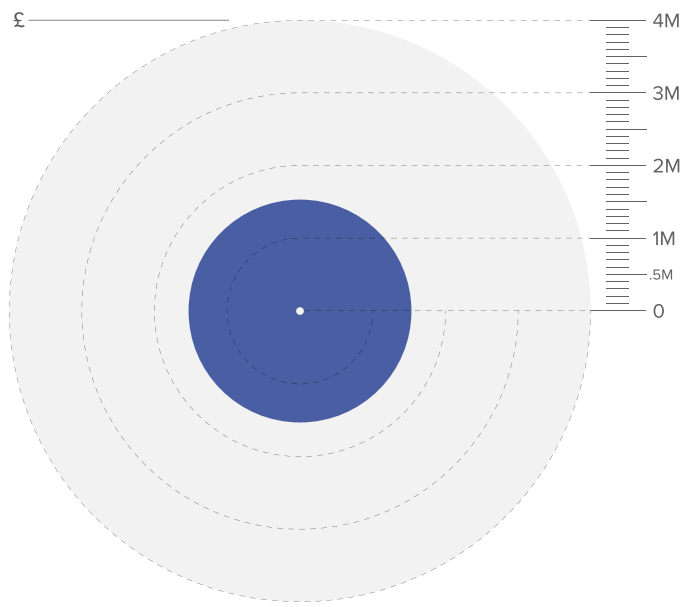
Outcomes

Bednights



15,500

Visitor Spend



£1,527,452

During 2017 the number of visitor nights in Jersey that can be attributed to the winter campaign is estimated at more than 15,500, with this being equivalent to visitor spending of almost £1,527,500. The campaign was recalled by more than two-thirds of those who had seen it more than a month after it had ended. Research shows that it was highly effective at making those who were exposed to it believe that Jersey was the sort of place that they

would enjoy and, that it was somewhere that offered a warm welcome. Well over half of those seeing the campaign talked to their friends and relatives about Jersey as a result, with over 40% saying that they actively searched for accommodation and flight/ferry information.

Spring Campaign | UK



Reconnect with nature

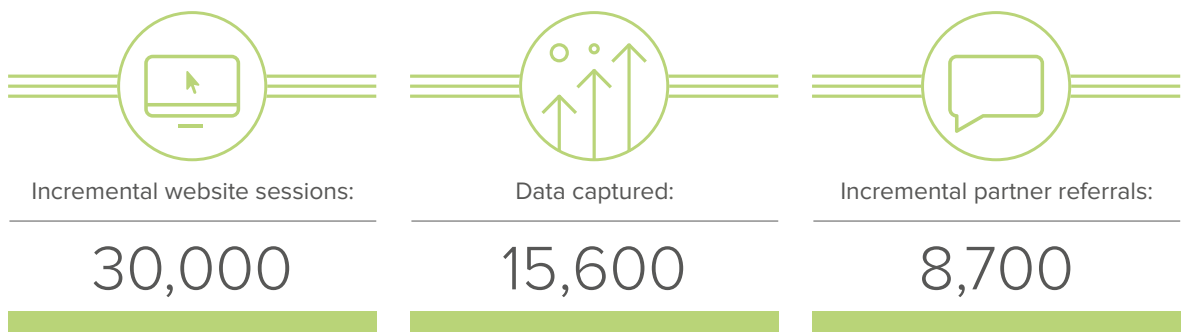
Evaluation

The popular ITV series 'The Durrells' provided an opportunity to deliver highly targeted activity to promote Jersey using one of our island ambassadors, Gordon Hunt, the Head Ape Keeper at Jersey Zoo. A series of digital video adverts ran across platforms such as the ITV hub, Twitter and Facebook. Users were directed to a campaign microsite with partner travel and accommodation offers, plus an opportunity to win a family holiday to Jersey.

This campaign ran from 1st March to the 24th April 2017.

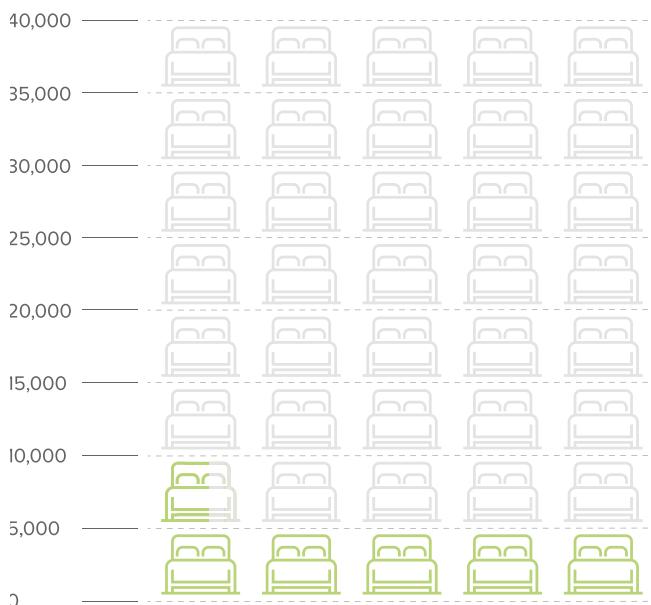
For more information:
www.jersey.com/the-durrells

Outputs



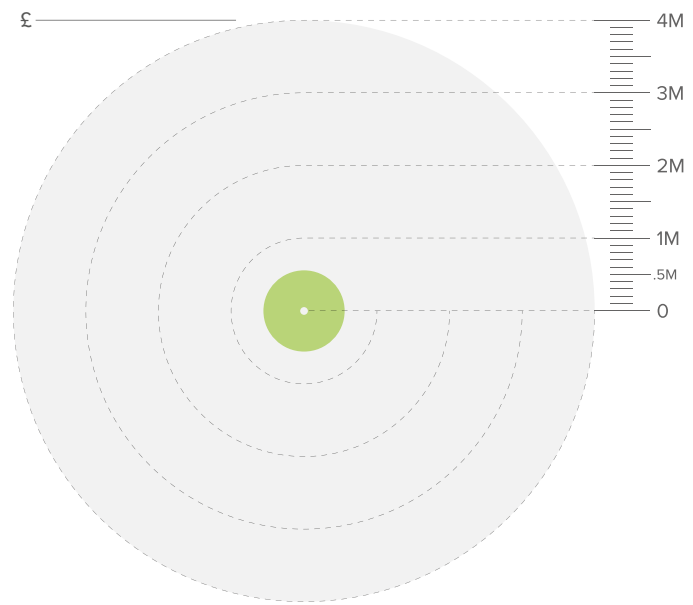
Outcomes

Bednights



5,573

Visitor Spend



£553,980

The number of visitor nights spent in Jersey that could be attributed to activity around The Durrells is estimated at more than 5,500 – equivalent to visitor spending of around £550,000. A little more than half, 56% of those seeing the campaign, recalled it more than a month later with virtually all who did so believing that it made Jersey look like the sort of place that they would enjoy. Around two-in-five said that as a result of seeing the campaign they talked to

their friends and relatives about Jersey, with a similar proportion actively researching accommodation options on the island.

The CI Heritage Festival | UK

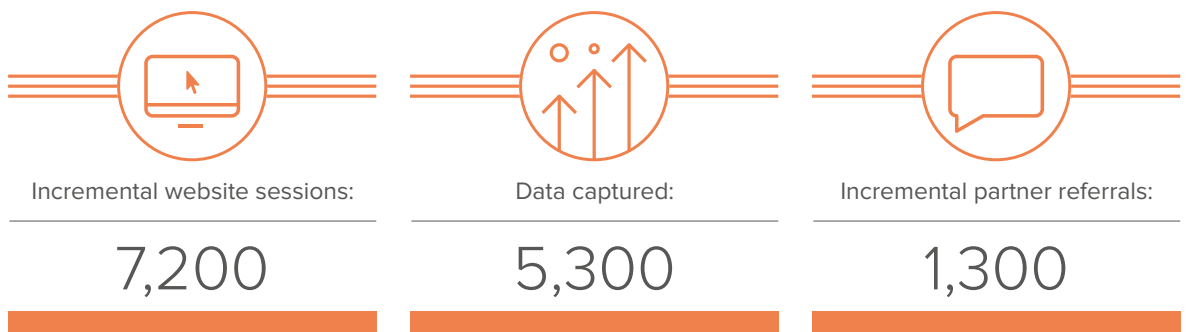


Evaluation

The 2017 Channel Islands Heritage Festival celebrated the journey of heroes, myths and legends. Working with Visit Guernsey, the campaign ran across a joint media plan to promote the festival and events programme consisting of press, radio, email, PR, digital banner and social ads, with a dedicated micro site giving people the opportunity to win an inter-island 4-night break to Jersey and Guernsey.

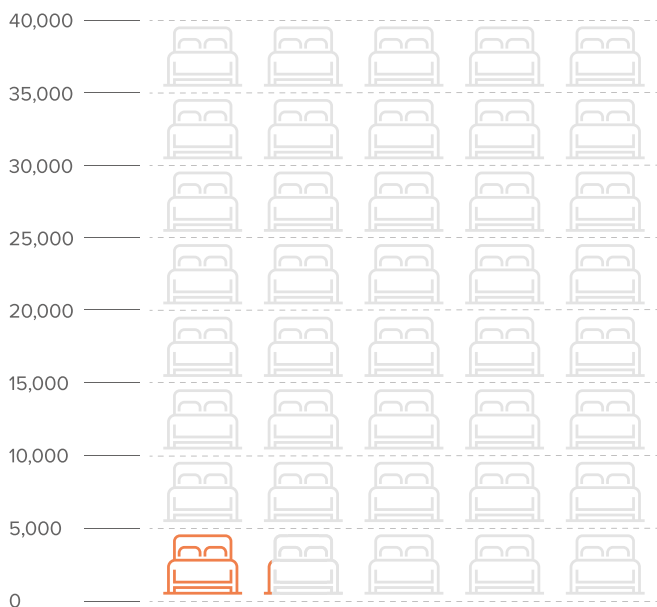
This campaign ran from 26th December 2016 to 1st April 2017.

Outputs



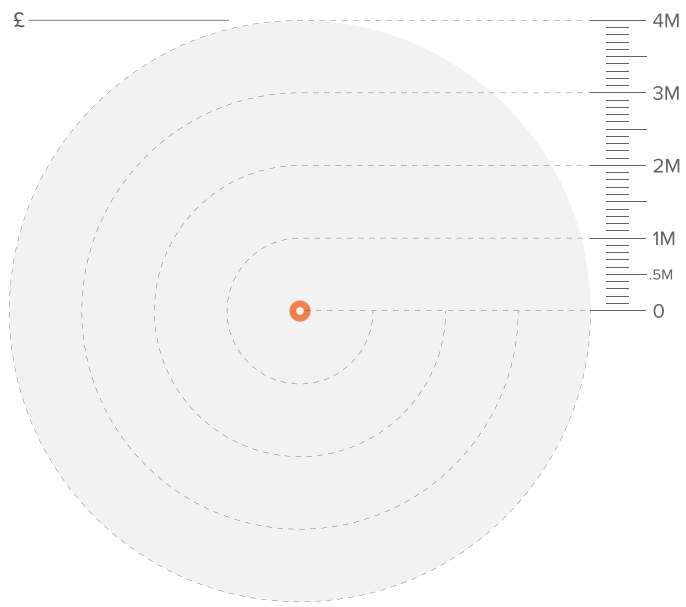
Outcomes

Bednights



1,088

Visitor Spend



£111,382

The number of visitor nights spent in Jersey that could be attributed the Channel Islands Heritage Festival activity is estimated at around 1,100 – equivalent to more than £110,000 of visitor spending. A little under three-in-five of those who interacted with the campaign recalled seeing it a month later, with those who did believing that it made Jersey look like the sort of place that offered a warm welcome.

Two-in-five of those recalling the campaign said that as a result they had talked to their friends and relatives about Jersey. It was apparent that those engaging with the campaign already had a strong understanding of the Channel Islands, with more than two thirds saying that they had visited the Channel Islands three or more times in the past.

Summer Campaign Part 1 | UK

Experience

Jersey? It's so uplifting



Looking for a short, sharp, stress-busting weekend break? Just two days in Jersey can totally transform your body and mind, says travel writer **Amanda Statham**

Life doesn't get much better than this, I think, as I finally manage to stand on my surfboard and ride a wave (almost) to the shore - a wide sandy beach lapping pretty St Ouen's Bay in Jersey. Just two days earlier I'd been so busy and stressed at work that I'd almost cancelled this weekend. Now I was thankful I hadn't. If, like me, you feel in need of a short, sharp, stress-busting break, a trip to this Channel Island treasure will provide that exact shot of feel-good. Despite the fact that it's just a 45-minute flight from Gatwick, the currency is sterling and everyone speaks English, Jersey still seems a little more exotic. Maybe this is because it's closer to France than to England and hotter (temperatures are, on average, 1°C warmer than the British mainland), or that you won't exhaust yourself dashing to and from the island, or that you can see and do it all in one go. Which is why, within hours of arriving, I'm grabbing a board and heading to the beach. I take along the beautiful five-mile beach on the east coast, the giant sand dunes are so beautiful, offering incredible views over me, as down in the water waves. I grab a barbecue from nearby and head to the Five Mile Road to El Tico (eliticjersey.com). This art deco spot is exactly the sort of place I daydream about running: wooden tables on the roof, a menu including chorizo and Spanish alongside an aperitif.

It's tempting to linger here and so I do, only heading back to my hire car as the sun sinks into the ocean. The empty headland and a weight starts to lift as Jersey's natural beauty works its magic. In St Helier, I discover that the island's capital is unexpectedly metropolitan, with a swish waterfront development, grand Victorian Opera House and elegant art gallery. I am staying at the Club Hotel & Spa (theclubjersey.com), a fabulous four-star boutique retreat, where my room features a massive bed with cloud-like linen, Elemis toiletries and a balcony overlooking the (heated) pool. As any local here will tell you, you head to the more sheltered east-coast beaches for sunrise. Which is why I'm up early the next morning and driving east to the pretty beach at Grouville Bay. It's worth it. The rising sun's pink fingers stretch gloriously along the sand to Gorey harbour, the 13th-century Mont Orgueil Castle framed as an imposing

“I leave looking and feeling like a different person”



Left: the Victorian opera house in St Helier

backdrop. Both uplifted and energised, I'm tempted to join the group serenely practising yoga on the sand. Instead, I opt to drive north through Jersey's pretty interior, passing granite farmhouses, fields of cows and colourful hedgerows, to reach Bouley Bay, a stunning cove which I've been told is one of the best and most sheltered dive spots on Jersey.

It's a magical experience, with crystal clear water. Once in, I'm astonished to see an impressive amount of marine life, from crabs and shimmering schools of fish darting across the bottom to squid and dolphins in the clear waters.

emptying your mind and finding inner peace. And it will leave you utterly famished. Perched on a cliff above Portelet Bay in the south, the Old Portelet Inn (randallis-jersey.co.uk) is another Jersey landmark that wouldn't look out of place in the Caribbean. Turquoise water, golden sand and a tiny island with a turret you can walk to when the tide's out, I munch my superfood salad and drink in the views, before tackling the dozens of steps descending to the beach. I take a taxi to Jersey, with my mind in a state of bliss. I'm not alone. Jersey has a reputation as a food hot spot (see the list of restaurants on the island) and a number of Michelin-starred chefs and restaurants on the island.

Get paddling

If you've always fancied giving surfing a go, Splash Surf Centre offers courses to get you up to speed. Boarding and riding the surf are a lot easier than you think. The team will get you up to speed at the ideal spot of St Ouen's Bay around the island. With Absolute Adventures Jersey is also perfect for sea-kayaking - Jersey Kayak Adventures offer introductory tours. You might even get to share the water with bottlenose dolphins.

Come alive this summer

Evaluation

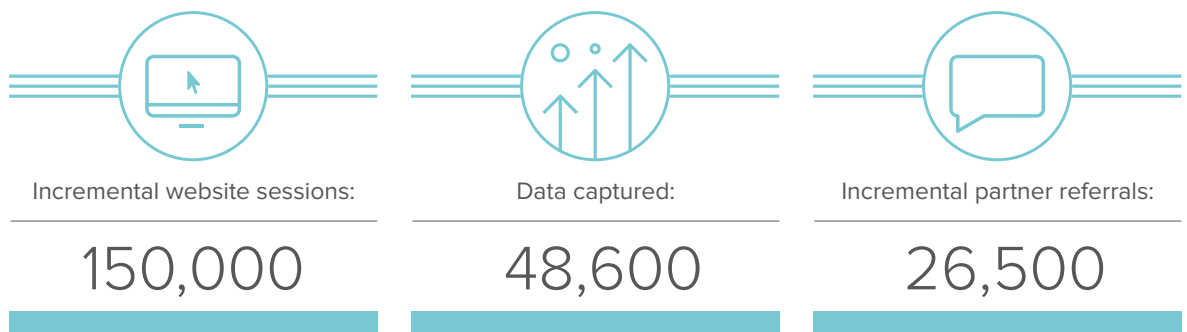
The first phase of the Visit Jersey summer 2017 campaign 'Come alive this summer' focused on generating demand for the important summer months. The campaign continued the destination brand focus on the benefits of visiting Jersey rather than just its features. The campaign was supported by a series of standout national print adverts, direct mail, 8-page pull-out supplements within The Times and The Daily Telegraph, digital display, interactive

digital units and social advertising. The activity drove traffic to the campaign landing page housed on jersey.com. This provided a platform to refer potential visitors to our partners.

This campaign ran from 26th December 2016 to 31st March 2017.

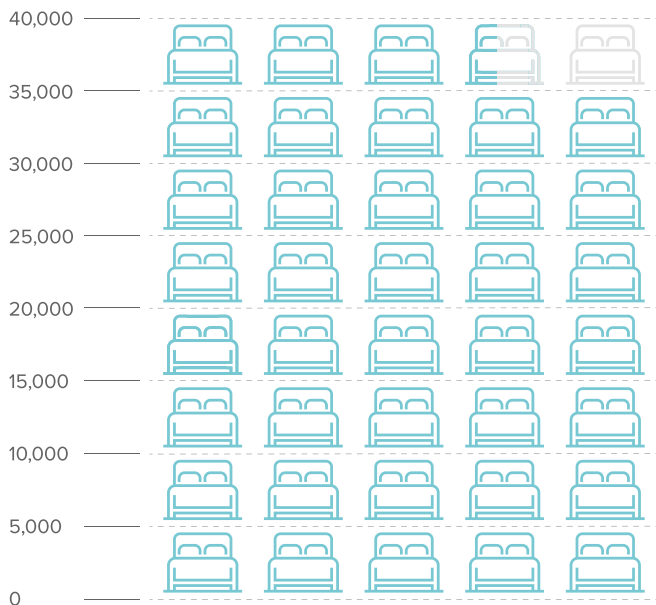
For more information: www.jersey.com/come-alive

Outputs



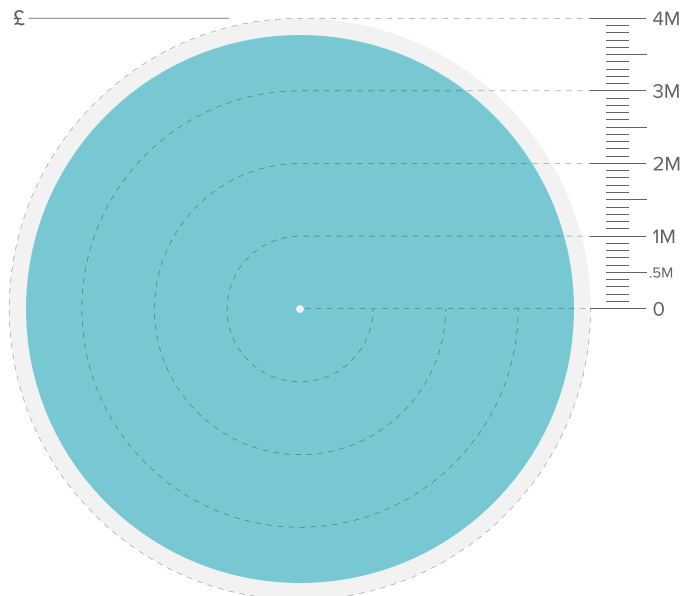
Outcomes

Bednights



38,432

Visitor Spend

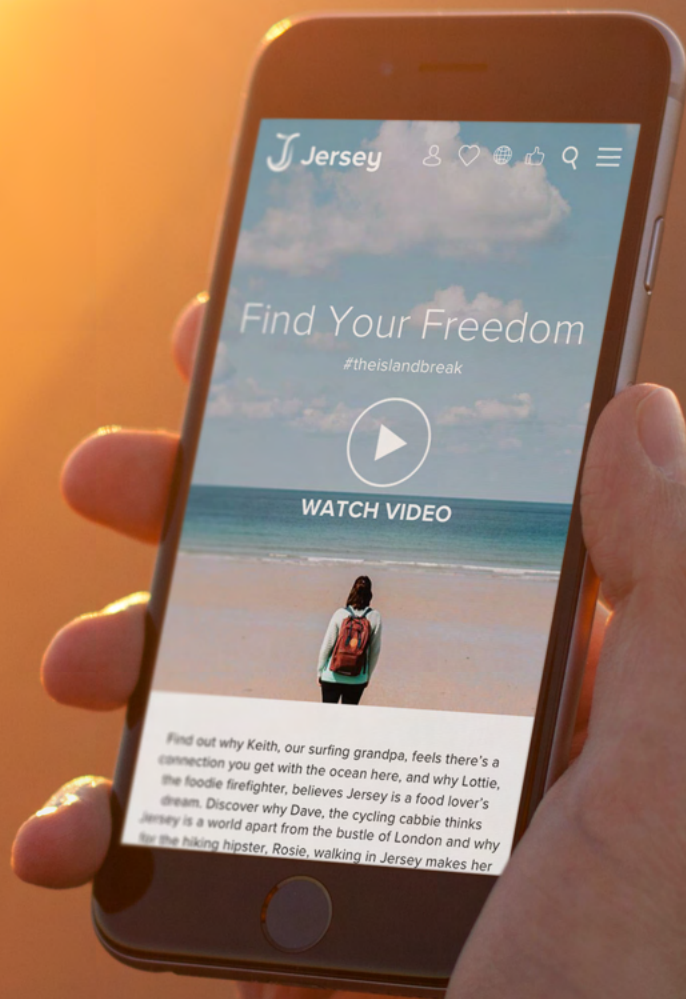


£3,763,881

The number of visitor nights that could be attributed to this first phase of our summer campaign is estimated at over 38,400 – equivalent to more than £3.7m of visitor spending. Encouragingly, two-in-three of those who saw the activity recalled it more than a month later. The material made those who had seen it feel that Jersey was the sort of holiday destination that they would enjoy and also that it had featured the sorts of places that they would want to visit while

on holiday. Two-in-five of those seeing the campaign followed one of the links to exclusive offers with a similar proportion looking for more information on travel to Jersey or accommodation options.

Summer Campaign Part 2 | UK



Find Your Freedom

Evaluation

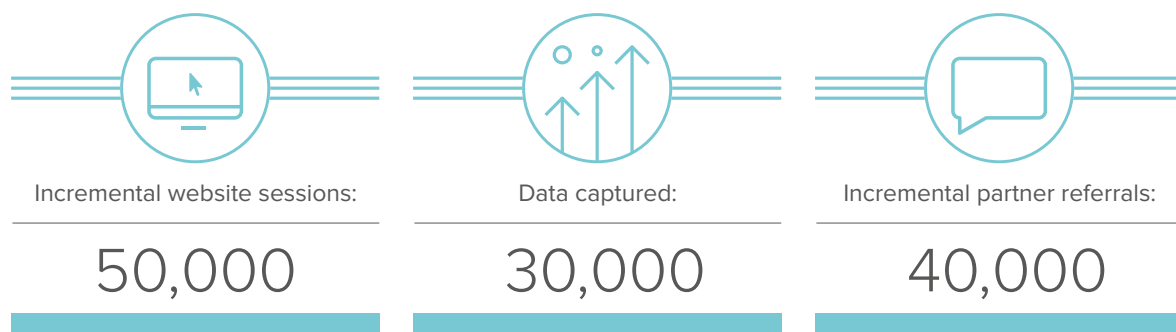
The second phase of the Visit Jersey summer 2017 campaign 'Find Your Freedom' followed the experiences of four visitors to the island, from the surprising to the extraordinary, each showcasing a fresh perspective on a Jersey escape. As well as Jersey's stunning sights, each episode highlights the unexpected backstories of the characters by following their day on the island from sunrise to sunset: The Foodie Firefighter, an unlikely

gastronome explores the culinary offering, The Surfing Grandpa, an experienced wave rider takes on Jersey's smooth sets, The Hiking Hipster, a Doc Marten clad East Londoner hikes the stunning coastline and The Cycling Cabbie, a London taxi driver trades in his four wheels for two on Jersey's Green Lanes.

This campaign ran from 1st June to 31st July 2017.

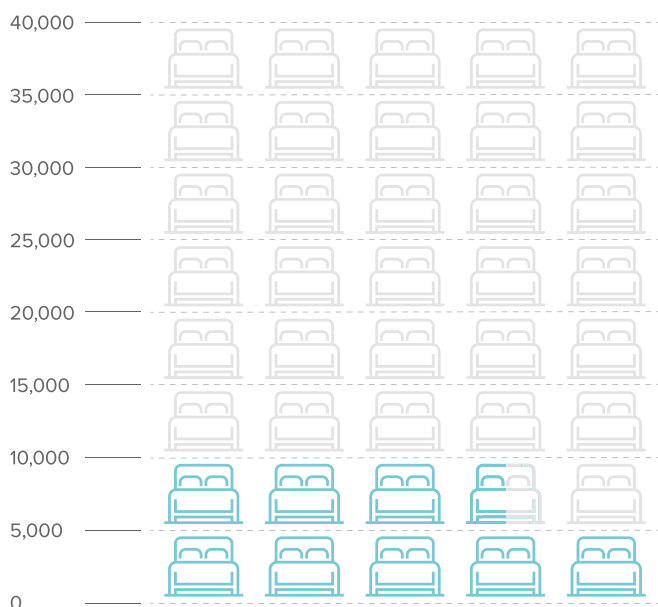
For more information:
www.jersey.com/find-your-freedom

Outputs



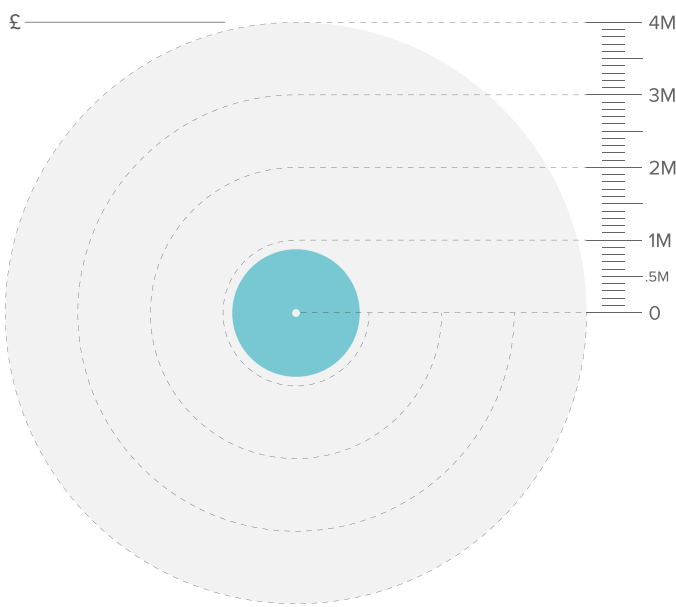
Outcomes

Bednights



8,468

Visitor Spend



£857,800

The number of visitor nights that could be attributed to this second phase of our summer campaign is estimated at over 8,400 – equivalent to almost £900,000 of visitor spending. More than six-in-ten of those who saw the activity recalled it more than a month later.

There were very high levels of agreement with the statement that the material featured imagery that made

the viewer want to discover Jersey for themselves and that Jersey was the sort of place that could be visited at any time of year. The campaign prompted more than one-third of those seeing it to proactively search for information on places to stay in Jersey and how to reach the island, with even more talking to their friends and relatives about the material they had seen.

Autumn Campaign | UK

How do you want to feel?

Campaigns | United Kingdom

Jersey
How do you want to feel?
#theisland
jersey

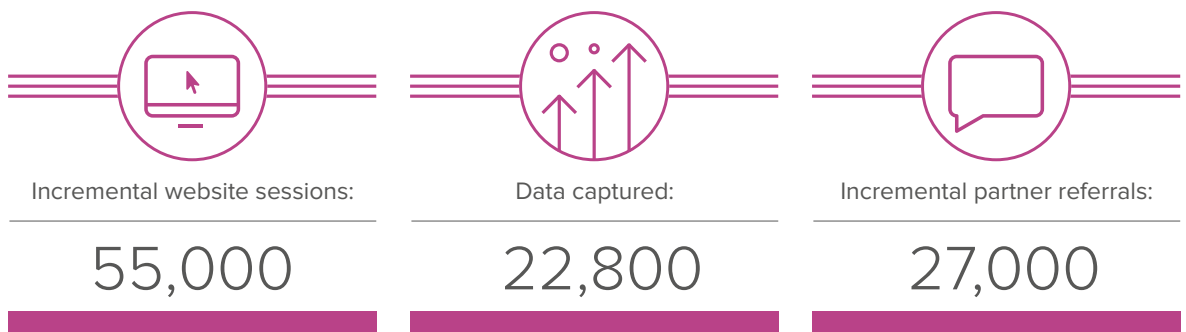
Evaluation

The Visit Jersey autumn campaign “How do you want to feel?” depicts Jersey as the perfect tonic to city life. Using a variety of networks that specialise in high engagement and video interactions, users were directed to a campaign hub and served itineraries and offers based around three feelings; relaxed, revitalised or reconnected.

This campaign ran from 31st August to 30th November 2017.

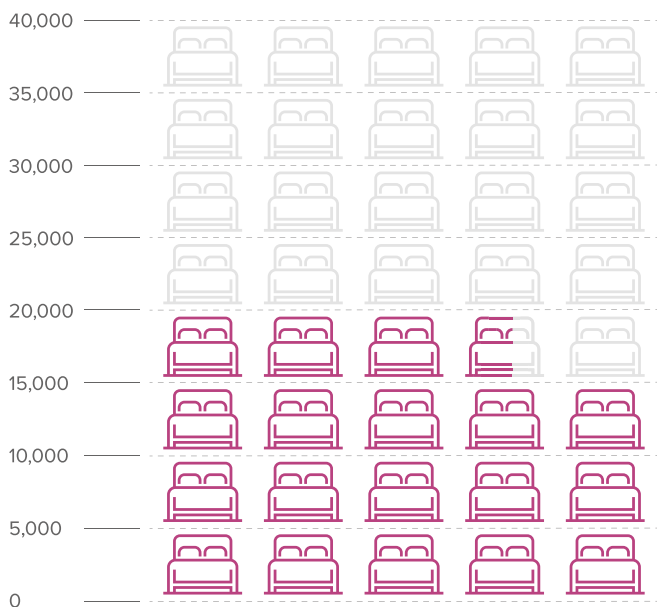
For more information:
www.youtube.com/watch?v=nd317ynVfU4

Outputs



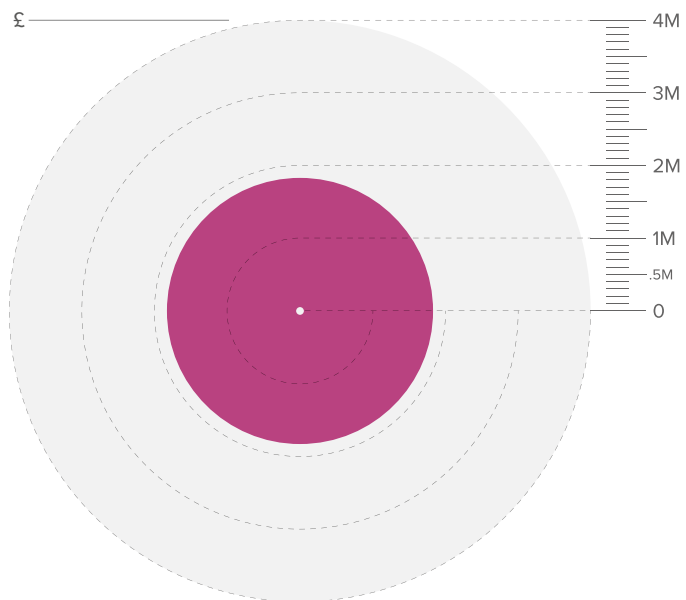
Outcomes

Bednights



18,592

Visitor Spend

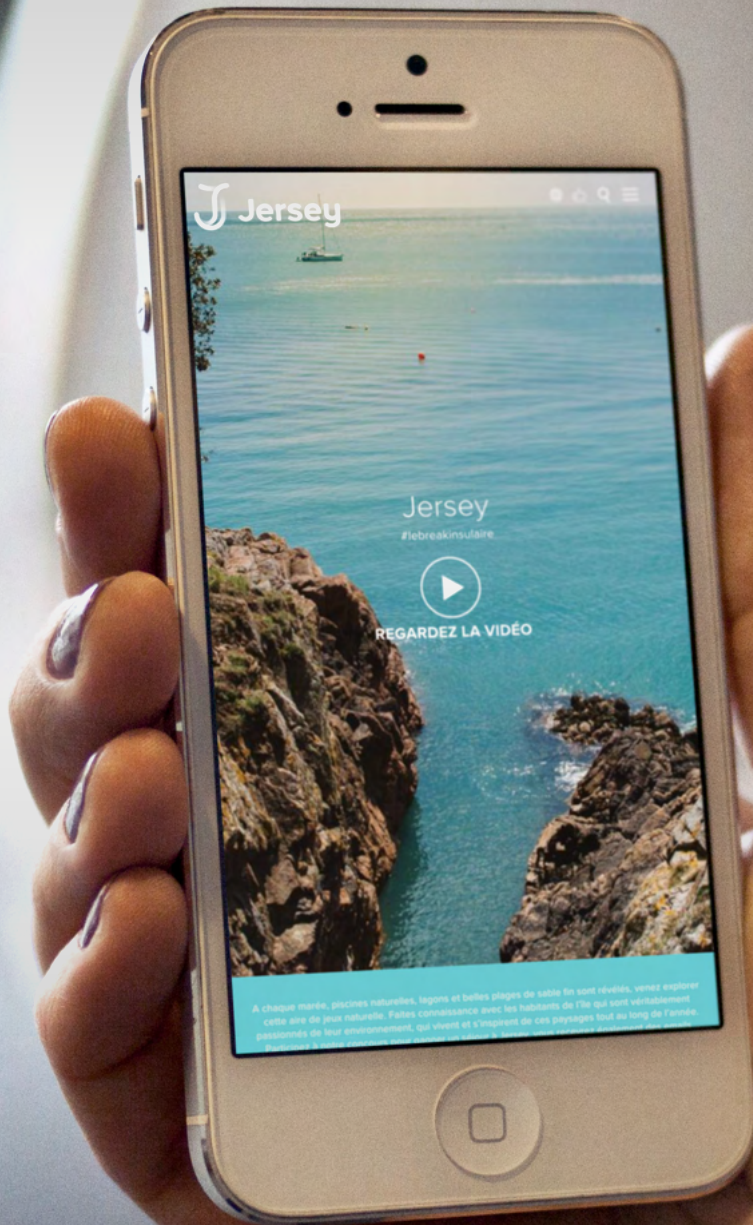


£1,820,751

More than a month after having seen the campaign more than 90% said that they recalled it. The material led respondents to say that it conveyed Jersey as being somewhere that offered a warm welcome and would be the sort of place that they would enjoy.

Advocacy is an important driver of destination choice and almost half of those seeing the campaign were stimulated into talking to their friends and relatives about Jersey as a result. Between one-quarter and one-third of those recalling the campaign actively searched for details of accommodation available in Jersey and flight or ferry fares as a result.

Winter Campaign | France



Come alive this winter

Evaluation

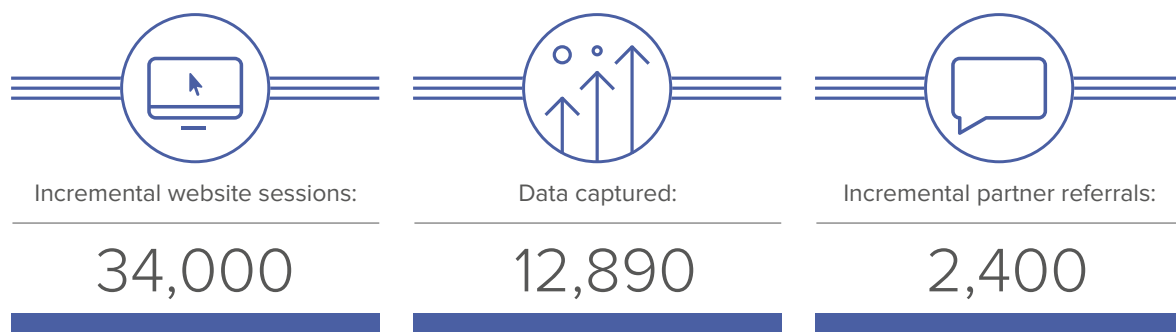
The Visit Jersey 2017 winter campaign “Come alive this winter” was replicated into the French market. The campaign told the story of ‘72 hours in Jersey’ using video and breathtaking imagery depicting natural landscapes, wellness experience and everything the island break has to offer for a short break. A series of digital and social ads, PR and an automated email campaign directed people to a dedicated

campaign landing page, containing winter articles and travel offers with Condor Ferries.

This campaign ran from 1st January to 28th February 2017.

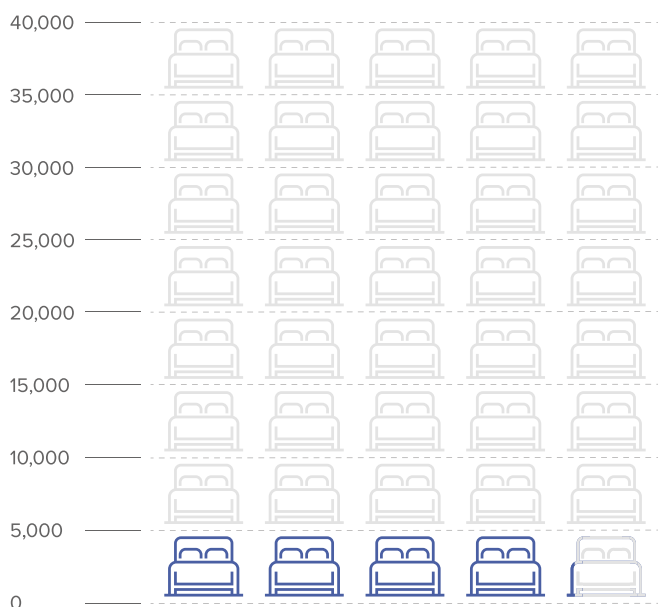
For more information:
www.jersey.com/fr/reveillez-hiver

Outputs



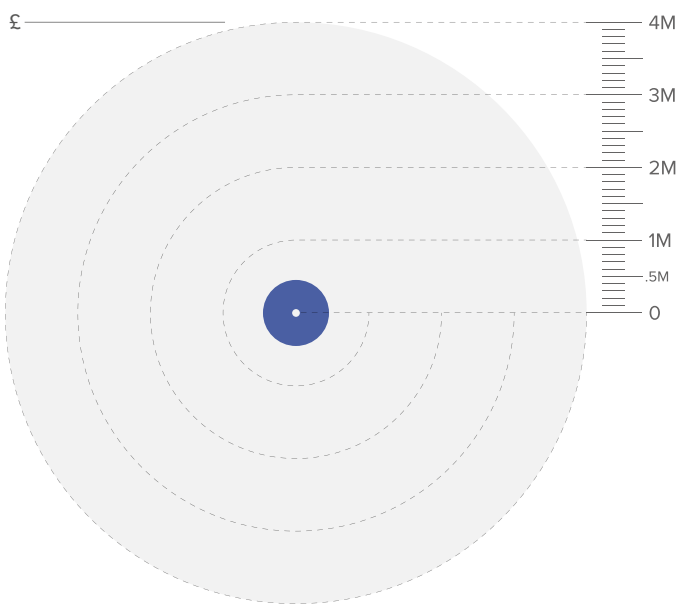
Outcomes

Bednights



4,056

Visitor Spend



£438,030

The number of visitor nights spent in Jersey that could be attributed to the winter campaign in France is estimated at a little more than 4,000 – equivalent to visitor spending in excess of £400,000. A very healthy 69% recalled the campaign more than a month later with the bulk of those who did saying that the imagery they had seen inspired them to want to visit Jersey.

Almost two-in-three were motivated to talk to their friends and relatives about Jersey as a result of seeing the activity with 44% looking for information about accommodation options.

Spring / Summer Campaign | France



Come alive
on the UK's
favourite
British island

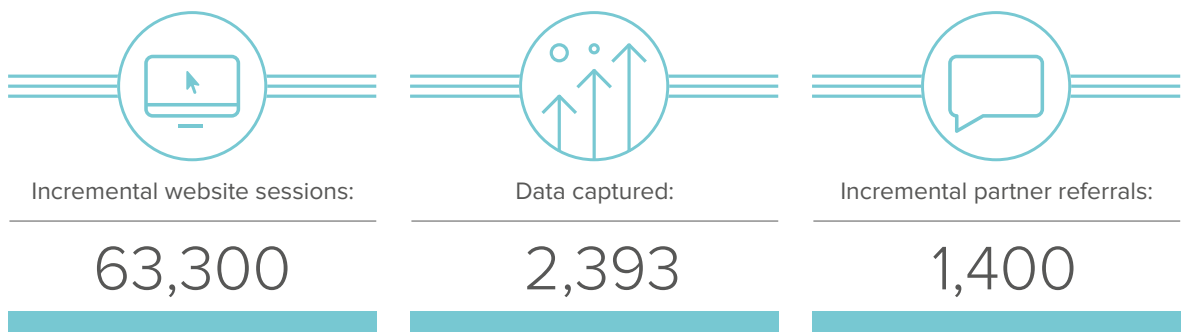
Evaluation

Our Spring / Summer activity for the French market continued the destination brand focus on the benefits of visiting Jersey rather than just its features, inviting French visitors through digital display and rich media activity to 'Come alive on the UK's favourite British island'

The campaign ran from the 1st April to the 30th June 2017.

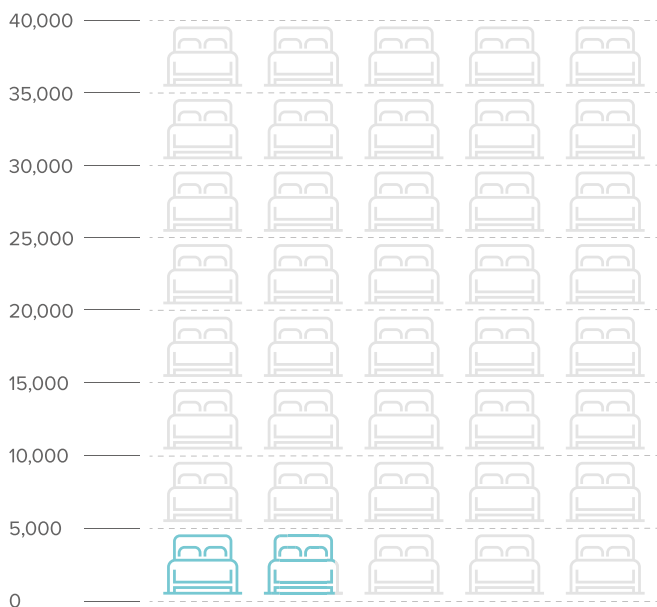
For more information:
<https://www.jersey.com/fr/eveillez-vos-sens>

Outputs



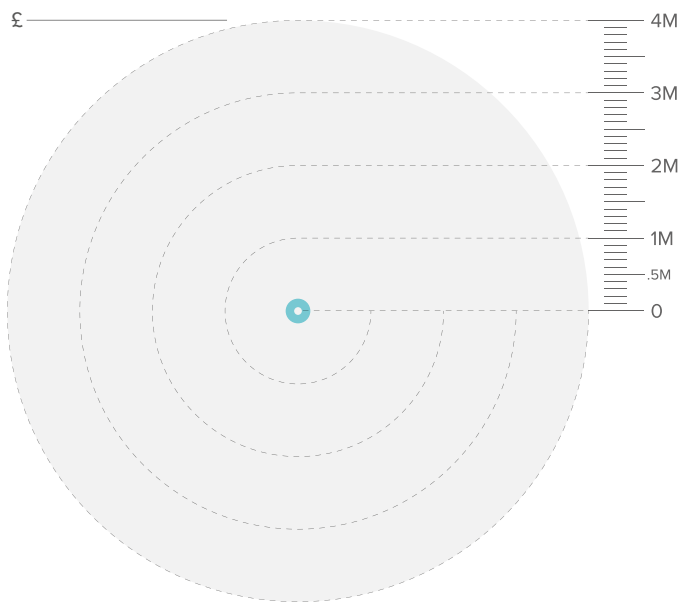
Outcomes

Bednights



1,880

Visitor Spend



£142,700

There were almost 2,000 bed nights in Jersey as a result of the French summer campaign, generating visitor spending of more than £142,000. Almost two-thirds of those seeing the campaign recalled it more than a month later.

Half of those seeing the campaign went on to research accommodation options in Jersey while one-in-three looked for more details of the activities that were featured. The typical trip to Jersey generated by the campaign was a short break of around three nights.

Content Marketing



Great content is more than just a pretty image, it lives forever.

Connecting with visitors is our number one priority, we generate demand by inspiring people to consider Jersey. Booking decisions are incredibly complex, more than one thing influences destination choice but great content is crucial, it talks to people right at the top of the sales funnel, just as they are looking for inspiration.





2017 Highlights

Our content is designed to feel authentic, warm, a personal recommendation, an arm around our visitor's shoulder



Local people

100⁺



Locations

60



Images

100,000



Features & Articles

130⁺



Films

48⁺



Languages

4

Jersey.com

Jersey.com re-launched in June 2016. During 2017, we have evolved multiple areas of the website to provide more value to visitors and industry stakeholders. Our website continues to inspire new visitors to choose Jersey through visual storytelling and provide resources for visitors to plan their trip and provide partners with referral opportunities.



Jersey

Jersey

#thislandbreak

This is Jersey. An island enjoyed by millions where some of the most stunning views in the world can be found and help to keep the island's natural beauty. It's an island where you can enjoy the best of both worlds. The island's natural beauty and its rich history and culture. Discover the island's natural beauty and its rich history and culture. Discover the island's natural beauty and its rich history and culture.

Jersey.com

2017 Highlights



February 2017

Guides and Features on the map

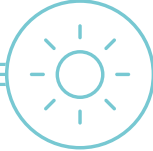
Guides and Features are geotagged using Google coordinates to appear on the map.



May 2017

Getting here (UK)

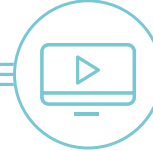
The new 'getting here' section enhanced how we curated air, sea and tour operators. Pins display on the map to show departure point, travel time and operator.



March 2017

Weather Forecast

We customised the Jersey Met feed to pull into jersey.com



August 2017

Homepage Video

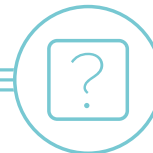
Auto-play video to bring pages to life.



July 2017

My Wishlist

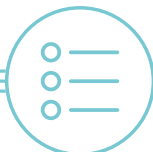
The new My Wishlist tool allows users to create bespoke itineraries by adding any content with a 'heart' symbol to a wishlist.



November 2017

What's On

Enhanced the landing page to allow better filtering and improved user experience.



November 2017

Partner listings pages

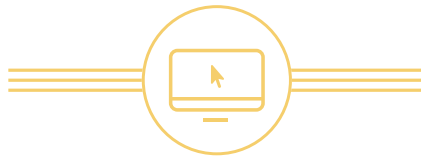
We enhanced partner pages by incorporating video, special offers, gallery enhancements and events listings.

Outputs



United Kingdom:

863,903



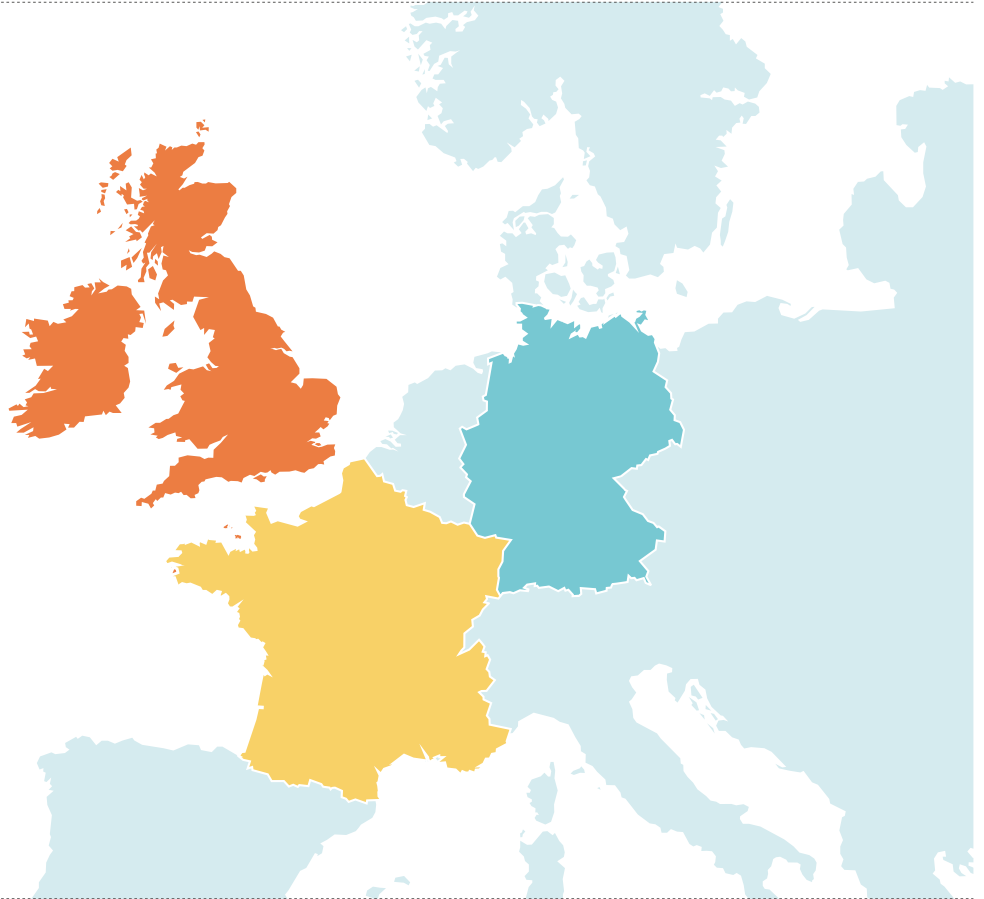
France:

217,422



Germany:

56,302



2017 website visits target:

1,500,000



Total website visits 2017:

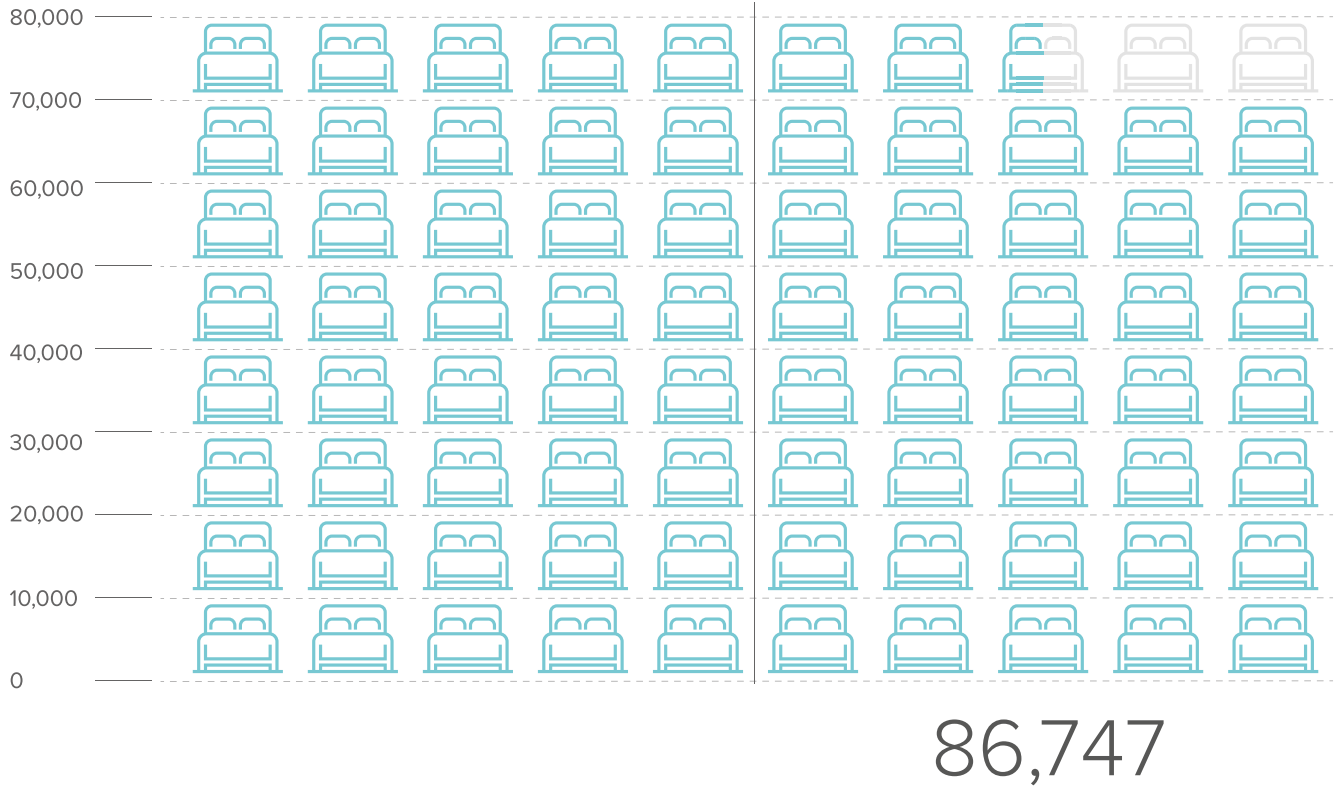
2,227,991



Jersey.com

Outcomes

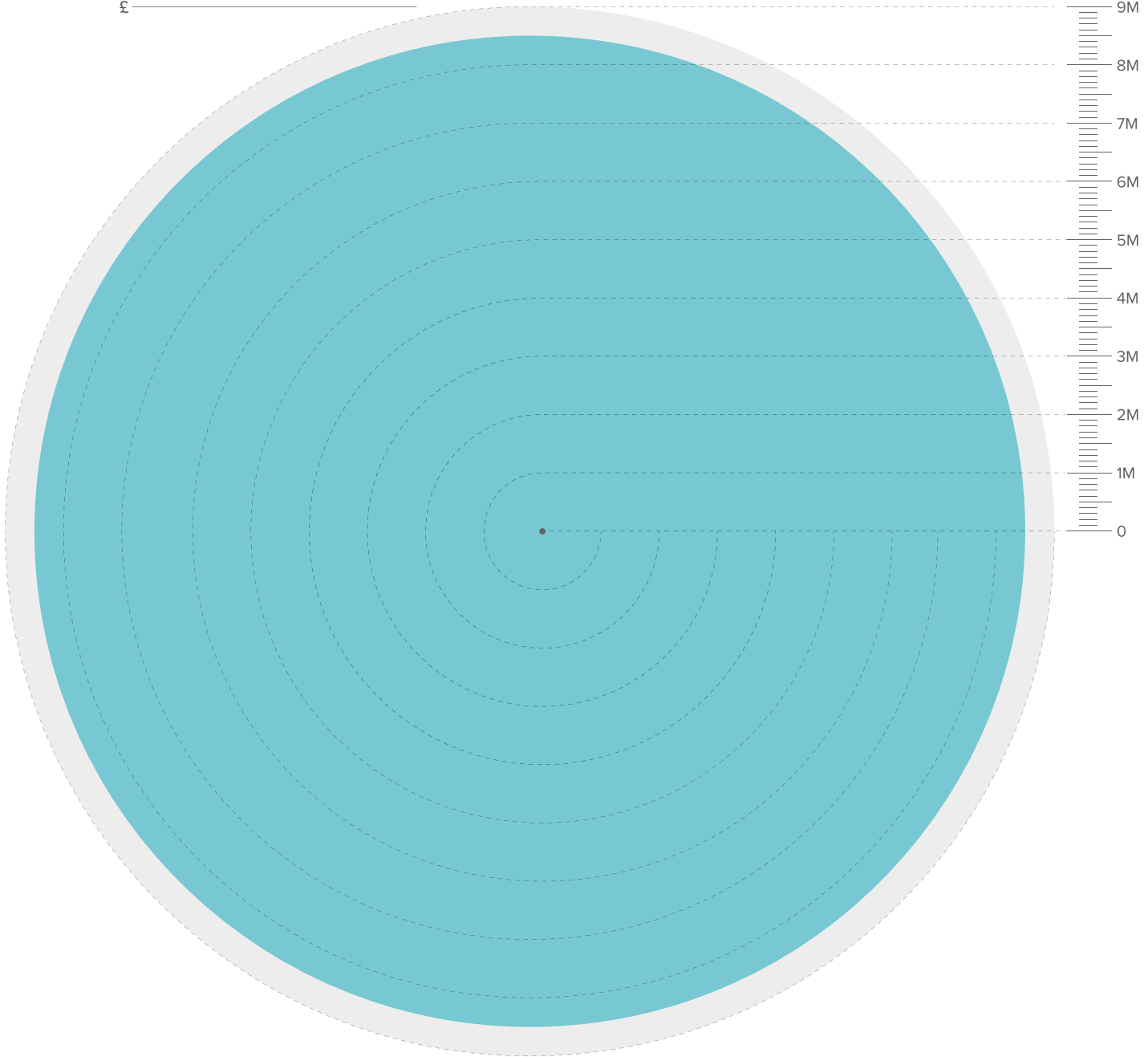
Bednights



More than 86,000 visitor nights and almost £8.5m of incremental visitor spending on the island can be attributed to the Visit Jersey consumer website. Focusing just on those who had a 'quality' interaction with www.jersey.com during 2017 reveals that the vast majority felt that it made Jersey look like the sort of place that they would enjoy and that it gave a sense of what there is to see and do on the island. Over half of those looking at the website subsequently talked to their friends and relatives about Jersey, with almost as many proactively searching for accommodation options.

Visitor Spend

£

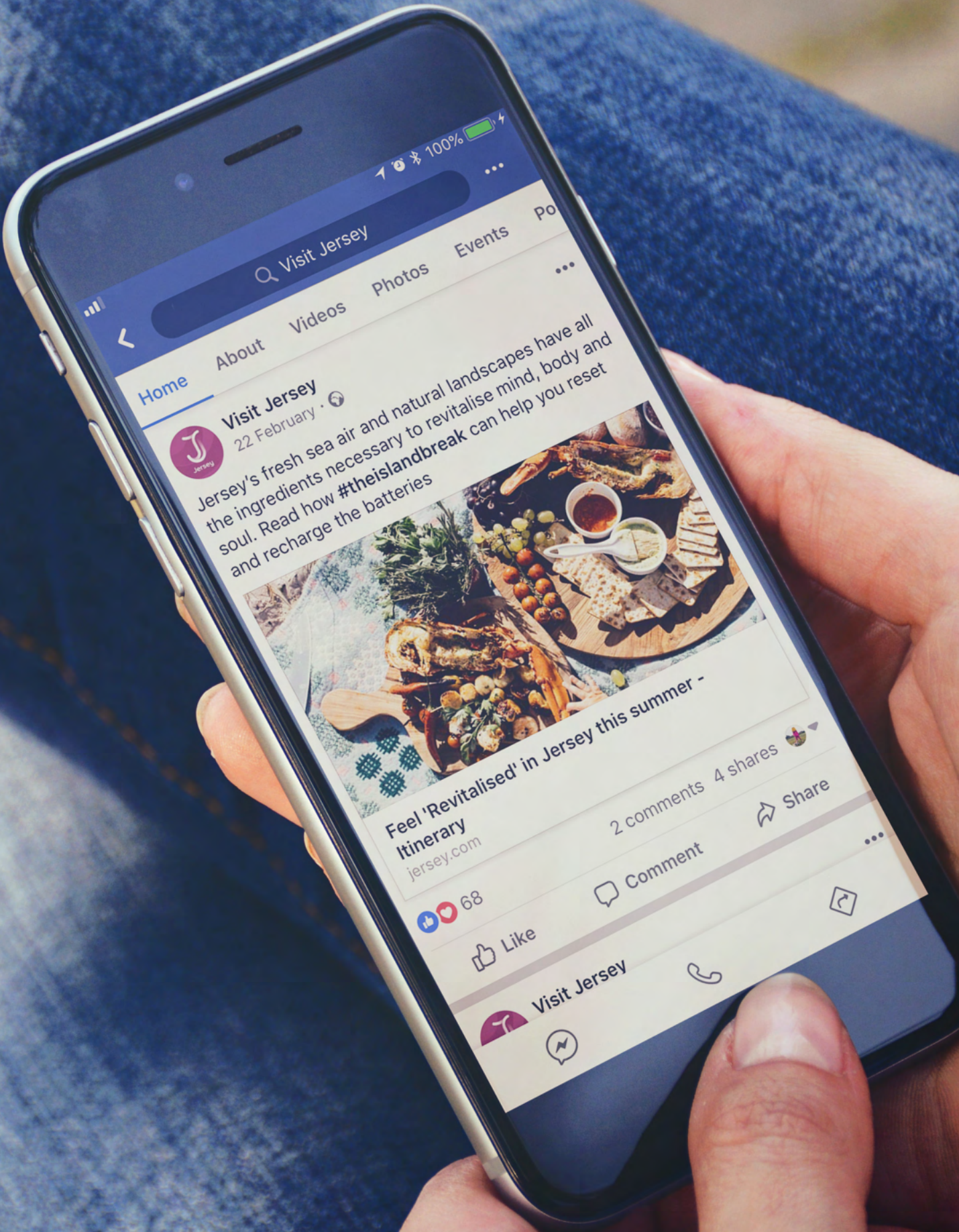


£8,492,012



Social media

Our aim is to activate and engage visitors through relevant, breathtaking content, creating conversations across our platforms using high quality video to draw out our key 'Hero Experiences', through to Itinerary 'Hub Style' content.



Visit Jersey

Home About Videos Photos Events Po



Visit Jersey
22 February · 🌐

Jersey's fresh sea air and natural landscapes have all the ingredients necessary to revitalise mind, body and soul. Read how **#theislandbreak** can help you reset and recharge the batteries



Feel 'Revitalised' in Jersey this summer -
Itinerary
jersey.com

2 comments 4 shares

68

Like

Comment

Share

Visit Jersey

Social Media

2017 Highlights

Our amazing 2017 ambassadors

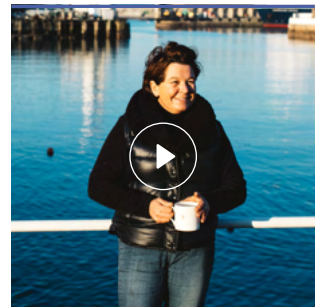
Meet Julie...

Park Ranger Julie's favourite moment is just before sunrise, when the light changes and you can hear the birdsong.



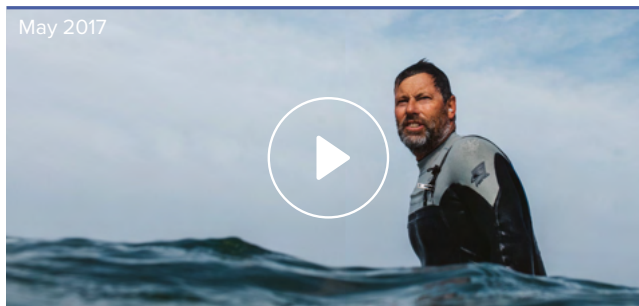
Meet Vicky...

Vicky runs a fresh fish stall that's been part of island life for more than 25 years, connecting customers with locally-caught fish and seafood straight from the boats.



Meet Dave...

Dave isn't just an award-winning photographer for Jersey's newspaper the Jersey Evening Post, he's also president of the Jersey Surfboard Club.



250K

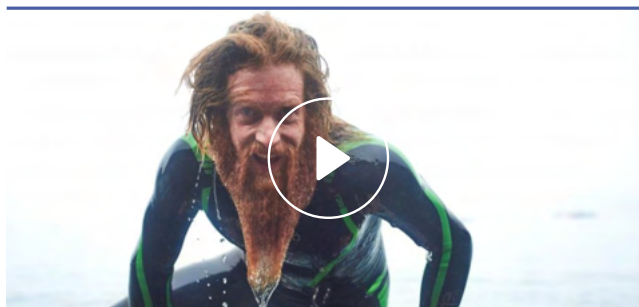
Video views (nearly)

70K

Minutes watched (nearly)

Meet Sean...

Best known for being the first person to cycle, swim and run the length of Britain, we challenged extreme adventurer Sean Conway to tackle as many on-island outdoors activities as possible in 48 hours.



110K

Video views

65K

Minutes watched



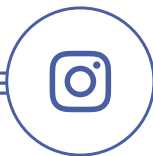
2017 Facebook visits target:

2016:	2017:	RISE
80,646	86,629	+ 7%



2017 Twitter visits target:

2016:	2017:	RISE
14,600	15,500	+ 6%

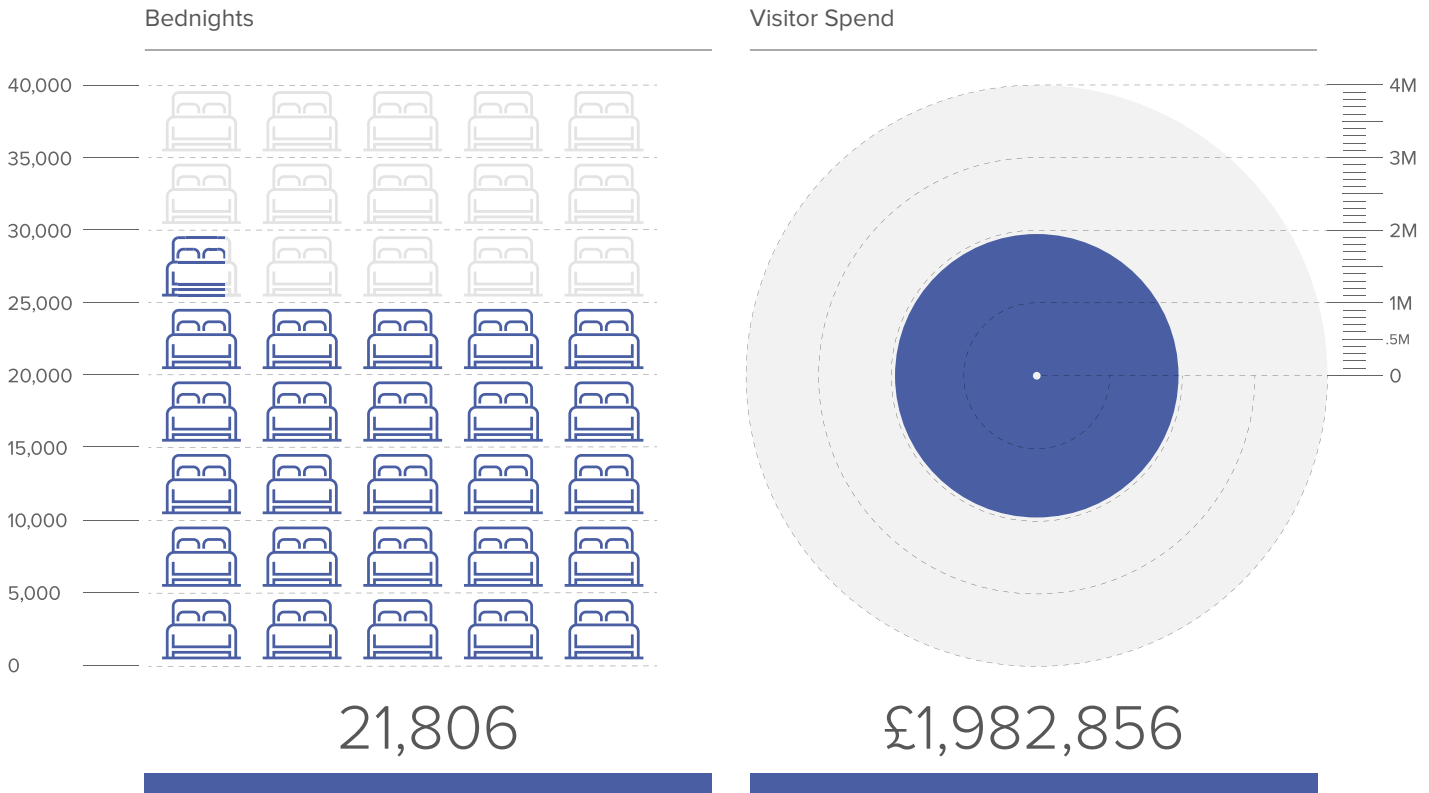


2017 Instagram visits target:

2016:	2017:	RISE
6,400	8,482	+ 32%

Social Media

Outcomes



Around half of our social media audience view our content at least once a week and most typically will view the content through a smartphone.

Two thirds of Facebook followers have reacted to our content, with a similar proportion of Twitter followers having ‘liked’ one of our tweets. As well as engendering strong levels of engagement those viewing our content strongly agreed that it made Jersey look like the sort of place they would enjoy and that the imagery inspired them to want to visit the island.

Around 64% said that as a result of seeing our social media content they had talked to their friends and relatives about Jersey, and two-in-three felt that the content they saw was both ‘Informative’ and ‘Appealing’.

Sure

19:33


Instagram



visitjerseyci
Jersey, Channel Islands



♥ 794 likes

visitjerseyci Visit our website for !!  ad

view all 12 comments



Email marketing

We continue to create and nurture relationships with visitors old and new through personalised relevant email content, collaborating with the industry on joint email marketing activities to strengthen our offer and provide better access to buying into Jersey experiences.

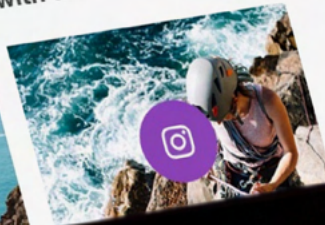
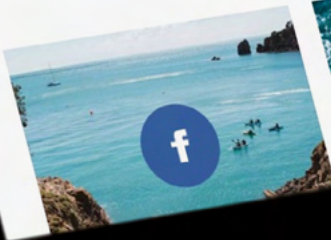
 Jersey

Welcome.

Time to experience Jersey

Sed ut perspiciatis unde omnis iste natus error sit voluptatem accusantium doloremque laudantium, totam rem aperiam, eaque ipsa quae ab illo inventore veritatis et quasi architecto beatae vitae dicta sunt explicabo. Nemo enim ipsam voluptatem quia voluptas sit aspernatur aut

Connect with us



Email marketing

2017 Highlights

Visit Jersey have continued to invest in email measurement and during 2018 will be providing silver and gold members of the partnership programme with greater transparency and insight on referrals driven by email communications. We are improving the anonymity of the data within our analytics tools, and we are making changes to our email database so that subscribers can have greater control of their data.

Outputs

UK

- The UK database grew by 63% during 2017 from 143.6k to 234.1k following a strong year of data capture and acquisition throughout our seasonally-led campaigns.
 - Around 3.8m emails were sent to our UK database and campaign email databases, of which 1.1m were opened and 131.1k clicks were recorded.
 - UK database average open rates of 29% were recorded throughout 2017; above the Travel sector average of 20.7% across regular and automation campaigns.
 - An average click rate of 11.8% was recorded following the increased adoption of email marketing automation campaign activity.
-
-
-

France

- The French database grew by 82% during 2017 from 42.3k to 76.85k. Again, strong campaign activity supported by targeted digital activity helped to maximise email sign-up rates and competition entries.
 - An estimated 520.7k emails were delivered to our French databases during 2017, of which, 84.5k were opened and 7.3k clicks were recorded.
 - French average open rates of 16.2% were achieved during 2017 with Spring/Q2 newsletters delivering the strongest results of the year.
 - An average click rate of 8.6% was delivered in France during the year across both regular and campaign email automation campaigns with the 2017 Winter Campaign delivering the strongest results of the year.
-
-
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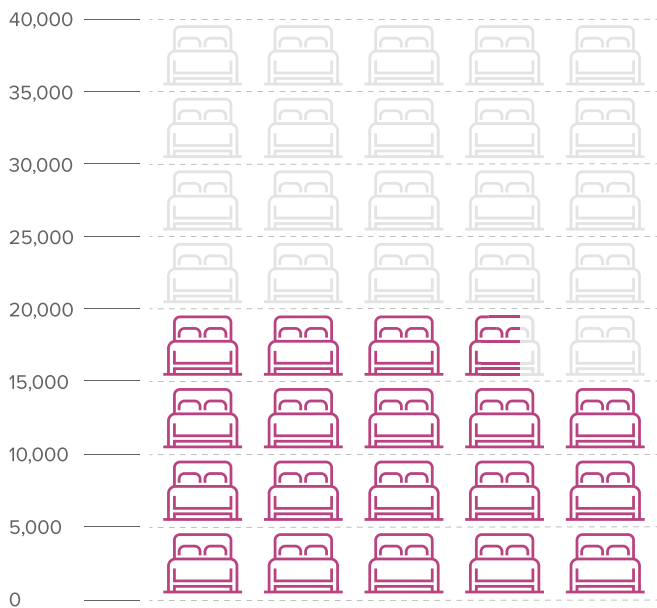
Germany

- The German database size remained consistent with that of 2016 with 15k database members.
- 15.1k emails were sent to our German database during 2017, of which, 10.6k were opened and 1k clicks were recorded.

- Average open rates and click rates performed well above industry average rates, at 70% and 9.1%, respectively.

Outcomes

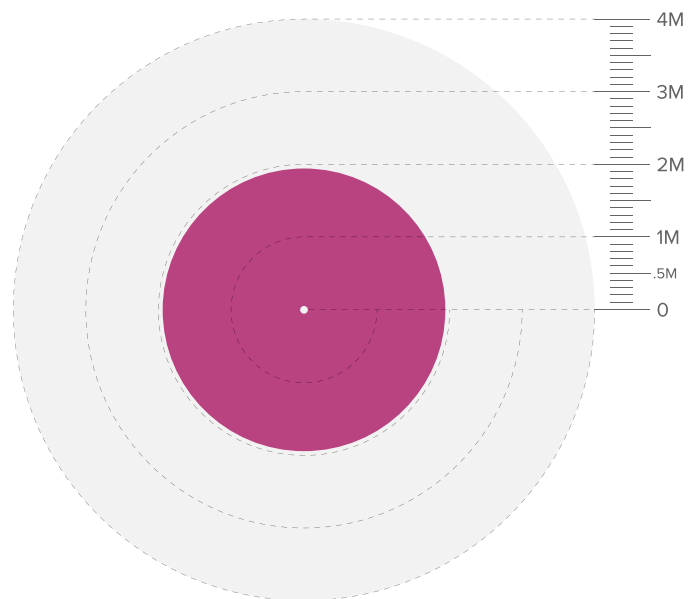
Bednights



18,820

(net of those who also interact with jersey.com)

Visitor Spend



£1,948,631

(net of those who also interact with jersey.com)

Focusing just on those who received emails from Visit Jersey but who did not regularly look at jersey.com the 'net' number of visitor nights spent in Jersey during 2017 that were attributable to Visit Jersey emails was almost 19,000, equivalent to visitor expenditure of almost £2 million.

The vast majority of those receiving emails from Visit Jersey said that they read articles contained in the newsletters either 'always' or 'most of the time'. When asked to choose words that best described the content of emails received from Visit Jersey, the most popular words were 'Informative' and 'appealing'.

There was very strong agreement that the emails provided a sense that Jersey was the sort of place that the reader would enjoy visiting.

Searching for accommodation options in Jersey was a popular action taken after reading Visit Jersey emails as was searching for flight and ferry routes serving the island.

Public Relations

We live in the sweet spot between traditional and social media. It's a noisy space but we've found a way to harness both channels to make ourselves heard. We craft world-class memorable media experiences that have given us the power to truly reach our desired audiences.



Public Relations

2017 Highlights



Metro Online

Audience:
35,430,728

'6 reasons why Jersey makes the perfect island break'



GQ Online

Audience:
3,000,000

'How to spend 48 luxury hours in Jersey'



Fabulous Magazine

Audience:
80,208,407

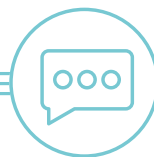
'The Bucket List - 3 UK Beach Breaks'

Outputs



Pieces of coverage

808



Pieces of coverage

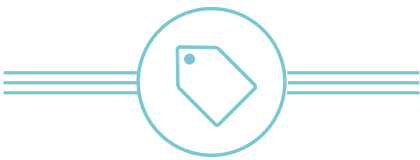
650



Pieces of coverage

59

Outputs



#theislandbreak tags:

189



Itineraries created:

65



MIK (marketing in kind) generated:

£13K

Outcomes

Key Metrics for 2017 UK PR Evaluation

- Among 524 pieces of coverage, 72 or 14%, were proactive pieces
- 99% of all coverage and 100% of proactive coverage was favourable
- 44% of all coverage and 62% of proactive coverage featured a key message
- 79% of all coverage and 92% of proactive coverage featured a call to action
- 33% of all coverage and 51% of proactive coverage featured an image
- 22% of all coverage and 21% of proactive coverage was in key media
- The greatest reach among our target audiences was achieved in the months of January, April, May, June and July, with a figure typically around 60%

Key Metrics for 2017 French PR Evaluation

- 43 pieces of proactive coverage were generated, all of which were favourable
- 51% of proactive coverage featured a key message and 91% a call to action
- 16% of proactive coverage was in key media
- 51% of proactive coverage featured an image

Key Metrics for 2017 Germany PR Evaluation

- 150 pieces of proactive coverage were generated, all of which were favourable
 - 39% of proactive coverage featured a key message and 57% a call to action
 - 11% of proactive coverage was in key media
 - 45% of proactive coverage featured an image
-

Our People | Our Board



Kevin Keen
Chairman



Doug Bannister



Keith Beecham



Tim Crowley



Mike Graham



Catherine Leech



David Seymour



Sam Watts

Our Team



Keith Beecham
Chief Executive Officer,
Visit Jersey



Rachel Winchurch
Executive Assistant to CEO



Adam Caerlewy-Smith
Head of Marketing



Meryl Le Feuvre
Head of Product



Rhys Powell
Market Development



Sarah Richardson
Digital Marketing Executive



Rebecca A'Court
PR & Marketing Executive



Sarah Barton
Head of Trade



Karen Evans
Product Executive



James Walker
Product Executive



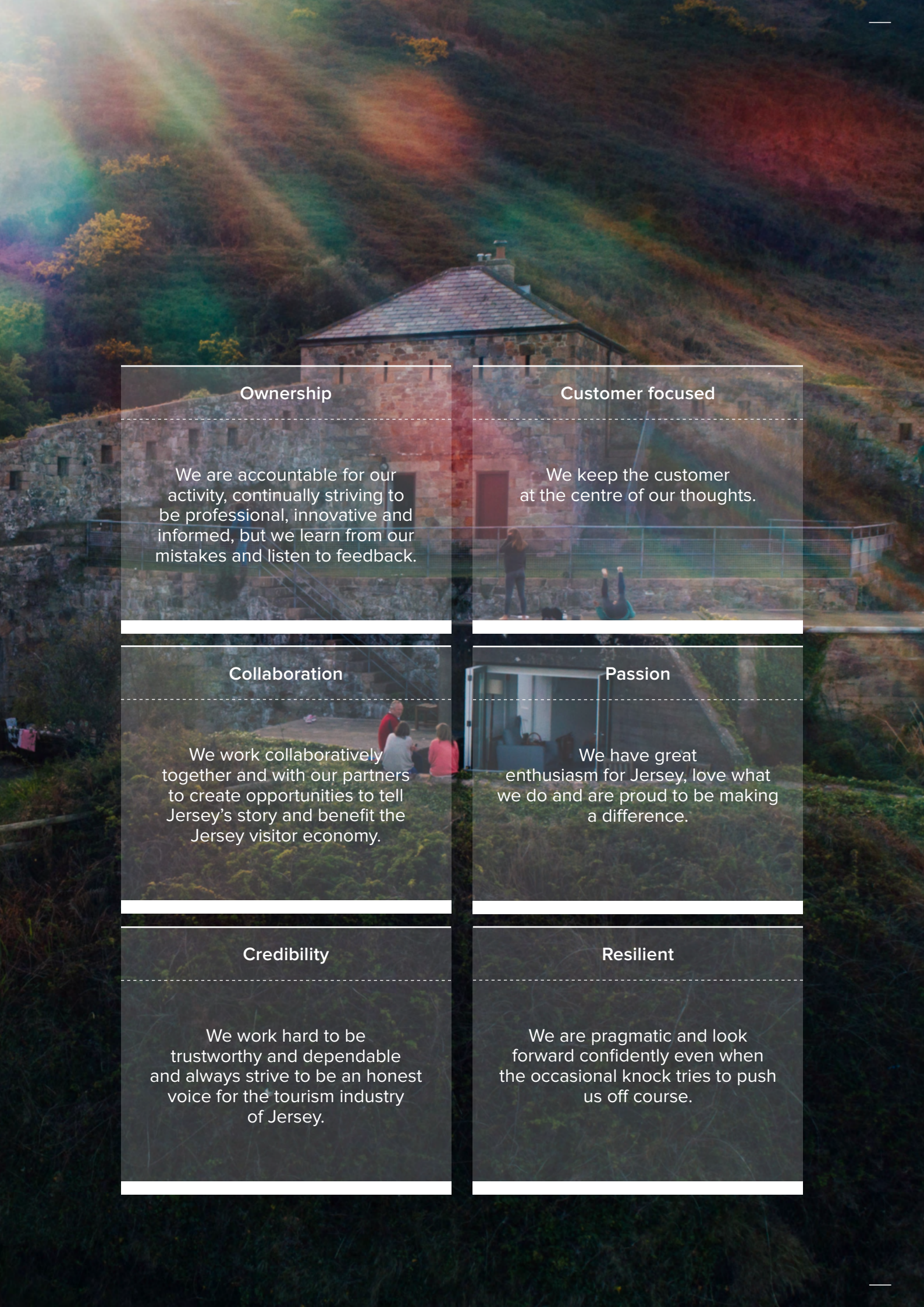
David Edwards
Head of Research
and Insights



Oliver Archbold
Head of Corporate
Services

Our Values

Connecting with visitors is our number one priority. Through everything we do, we generate demand by inspiring people to consider Jersey.



Ownership

We are accountable for our activity, continually striving to be professional, innovative and informed, but we learn from our mistakes and listen to feedback.

Customer focused

We keep the customer at the centre of our thoughts.

Collaboration

We work collaboratively together and with our partners to create opportunities to tell Jersey's story and benefit the Jersey visitor economy.

Passion

We have great enthusiasm for Jersey, love what we do and are proud to be making a difference.

Credibility

We work hard to be trustworthy and dependable and always strive to be an honest voice for the tourism industry of Jersey.

Resilient

We are pragmatic and look forward confidently even when the occasional knock tries to push us off course.


An aerial photograph of a forest landscape. The ground is covered in dense yellow gorse bushes. Several stone ruins, likely from a castle or fortification, are visible, including a large circular stone wall and several smaller structures. A dirt path winds through the gorse, and a group of people is walking along it. The overall scene is bright and sunny.

Financial Report

	2017		2016	
	£	£	£	£
OTHER INCOME				
Grant from States of Jersey	5,100,000		5,100,000	
Other net income	33,169		114,091	
		5,133,169		5,214,091
OPERATING EXPENSES				
Marketing Costs	3,517,622		3,667,799	
Staff Costs	894,826		911,254	
Other Operating Costs	588,383		603,001	
		5,000,831		5,182,054
SURPLUS FOR THE YEAR/PERIOD		132,338		32,037

Visitor Economy Profile





With 726,800 visits, generating 2.9 million visitor nights, worth £250.2m of on-island expenditure, 2017 was a strong year for Jersey's visitor economy. In fact, it was the strongest year for a decade, and when looking at the crucial market of holiday visitors who stay overnight on the island it was the fourth straight year of growth.

There are always headwinds to be faced and the growing ease with which video-conferencing can take place is just one of the factors influencing trends in business tourism. Events can generate both leisure and business visits, a prime example being the Super League Triathlon, where more than 600 of the visitors who spectated at the event had travelled to Jersey specifically to enjoy the event. There were numerous visible signs of investment across the visitor economy too, perhaps most visible of which was the rapid progress on constructing the island's first Premier Inn.

At first sight many people might consider the visitor economy to be limited to hotels, restaurants and attractions, but its influence spreads much more widely, helping to support jobs in a wide array of industries and helping to preserve the island's treasured heritage and environment. In total around 7,000 jobs are supported by tourism activity, that's around one in every eight.

More visitors mean more spending in the local economy, which is not only good for those businesses with which the visitor interacts, it is also good for States of Jersey tax coffers with five pence in every pound spent locally being GST. The upshot of this is that in 2017, around £12.5m of GST revenue came courtesy of visitors to the island – an amount able to underpin public spending on services such as health and education and equivalent to about £120 per man, woman and child living on the island.

Visit Jersey has been running an Exit Survey since the summer of 2016 that is conducted by an independent agency, 'Island Global Research'. This study allows us to gain robust estimates as to the volume and value of tourism to Jersey and to profile the characteristics of visitors.

Interviewing takes place at different times of day and on different days of the week within each month of the year to ensure that each route is covered. In total around 36,000 interviews take place per annum to establish the volume of passengers that are visitors, and a further 8,500 in-depth interviews take place with visitors to explore more about the characteristics of their trip.

Across the following pages we profile some of the insights that emerge, helping us to gain a much richer understanding of Jersey's visitor economy. All data is taken from the Exit Survey unless otherwise stated.

BDO were engaged to perform certain Agreed-Upon-Procedures over our compilation of the Exit Survey figures, being in accordance with our methodology. Their work was to validate, on a sample basis, that the methodology Visit Jersey devised was followed and that figures were accurately compiled based on that methodology. BDO were not engaged to confirm the design of the methodology is appropriate or provide absolute assurance over the underlying report.

The Volume and Value of Tourism in Jersey 2017

Topline Data

	2016	2017	Annual Change
Total Visits (000s)	692.0	726.8	5%
Of which:			
Visits lasting 1 or more night	542.0	617.4	12%
Day trip Visits	150.0	109.5	- 37%
Total Visitor Nights (m)		2.92	
Total On-Island Spending (£m)	£ 228.3	£ 250.2	9%
Average Length of Stay	n/a	4.7	
Spend per Night (£)	n/a	£ 86	
Spend per Visit (£)	£330	£ 344	4%

On-Island Visitor Expenditure breakdown in 2017 *

	Total (£m)	Per Visit (£s)
Accommodation	£ 135.9	£ 187
Non-Accommodation items	£ 114.3	£ 157
Of which:		
Tours	£ 2.4	£ 3
Food and Drink	£ 60.3	£ 83
Retail	£ 15.9	£ 22
Attractions and Activities	£ 16.5	£ 23
On-Island Transportation	£ 17.6	£ 24
Other items	£ 1.4	£ 2
Estimate of GST raised (£m)	£ 12.5	

* Note that the average spend per visit includes visits with zero expenditure on each respective category

Purpose of Visit in 2017

	Visits			Visitor Nights		Visitor Spend	
	Overnight Visits (000s)	Day-Trip Visits (000s)	Total (000s)	Total (m)	Nights per Overnight Visit	Total (£m)	Spend per Visit (£s)
Holiday	431	77	508	1.986	4.6	£ 205.4	£ 404
Business	60	19	79	0.270	4.5	£ 14.9	£ 189
Visits to Friends or Relatives	102	1	103	0.566	5.5	£ 19.6	£ 190
Other	24	12	36	0.095	3.9	£ 10.3	£ 284

Source Markets in 2017

	Visits (000s)	Visitor Nights (m)	Visitor Spend (£m)	Spend per Visit (£)
UK	475	2.238	£ 193.8	£ 408
France	132	0.166	£ 16.7	£ 127
Guernsey	38	0.069	£ 7.8	£ 206
Germany	21	0.106	£ 10.3	£ 502
Ireland	9	0.043	£ 3.1	£ 362
Netherlands	8	0.031	£ 4.0	£ 501
Switzerland	4	0.029	£ 1.5	£ 380
Other Markets	41	0.234	£ 12.9	£ 317

Mode of Travel in 2017

	Visits (000s)	Visitor Nights (m)	Visitor Spend (£m)	Spend per Visit (£)
Scheduled Air	498	2.323	£ 201.93	£ 406
Private Plane	3	0.003	£ 0.23	£ 80
Scheduled Ferry	207	0.551	£ 46.68	£ 226
Visiting Yachtsmen	16	0.040	£ 1.27	£ 78
Cruise	3		£ 0.10	£ 31

The Volume and Value of Tourism in Jersey 2017

Net Promoter Score among Holiday Visitors

45

Duration of Stay of Visits in 2017 (000s)

Day Visit	109.5
1-3 nights	258.7
4-6 nights	205.4
7 nights	105.6
8+ nights	47.6

Accommodation used by Visitors in 2017

	Visits (000s)	Visitor Nights (m)
Hotel	462	1.909
Guest House	20	0.112
Self-catering	33	0.242
Stayed with friends or relatives	87	0.544
Camping	8	0.055
Hostel	1	0.003
Other	7	0.054

Accommodation Performance in 2017

	2016	2017	Change
Room Occupancy	66%	66%	0%
Average Daily Rate	£ 106	£ 112	6%
Revenue per Available Room	£ 70	£ 74	6%

Source: STR

Registered Accommodation Stock in Jersey

	PREMISES	TOTAL BED SPACES	TOTAL BEDROOMS	SELF-CATERING BEDSPACES	SELF-CATERING UNITS	CAMPSITE BEDSPACES	TOTAL PERSONS ACCOMMODATED
Hotels	58	7,589	3,724	62	19	-	7,651
Guest Houses	35	796	398	35	9	-	831
Self Catering	32	-	-	1,193	338	-	1,193
Camp Sites	6	-	-	-	-	747	747
Youth Hostel	2	146	33	-	-	40	186
Total	133	8,531	4,155	1,290	366	787	10,608

A recent Product Audit identified that as of 2017, Jersey's AirBnB capacity was capable of accommodating around 550 visitors on any given night.

How Holiday Visits to Jersey were booked in 2017

	HOLIDAYS WITH TRAVEL AND ACCOMMODATION BOOKED TOGETHER	HOLIDAYS WITH TRAVEL AND ACCOMMODATION BOOKED SEPARATELY		ALL HOLIDAYS	
		HOW TRAVEL BOOKED	HOW ACCOMMODATION BOOKED		
Internet direct with provider (airline, hotel etc)	28%	85%	39%	51%	72%
Internet via third party (travel agent, tour operator, booking com etc)	25%	4%	36%	22%	
Non-internet direct with provider (airline, hotel etc)	5%	4%	15%	8%	22%
Non-internet via third party (travel agent, tour operator, etc)	36%	4%	2%	14%	
Dont know / Booked by someone else / NA	7%	3%	8%	6%	6%
Share of all Holiday Visits	50%	50%		100%	

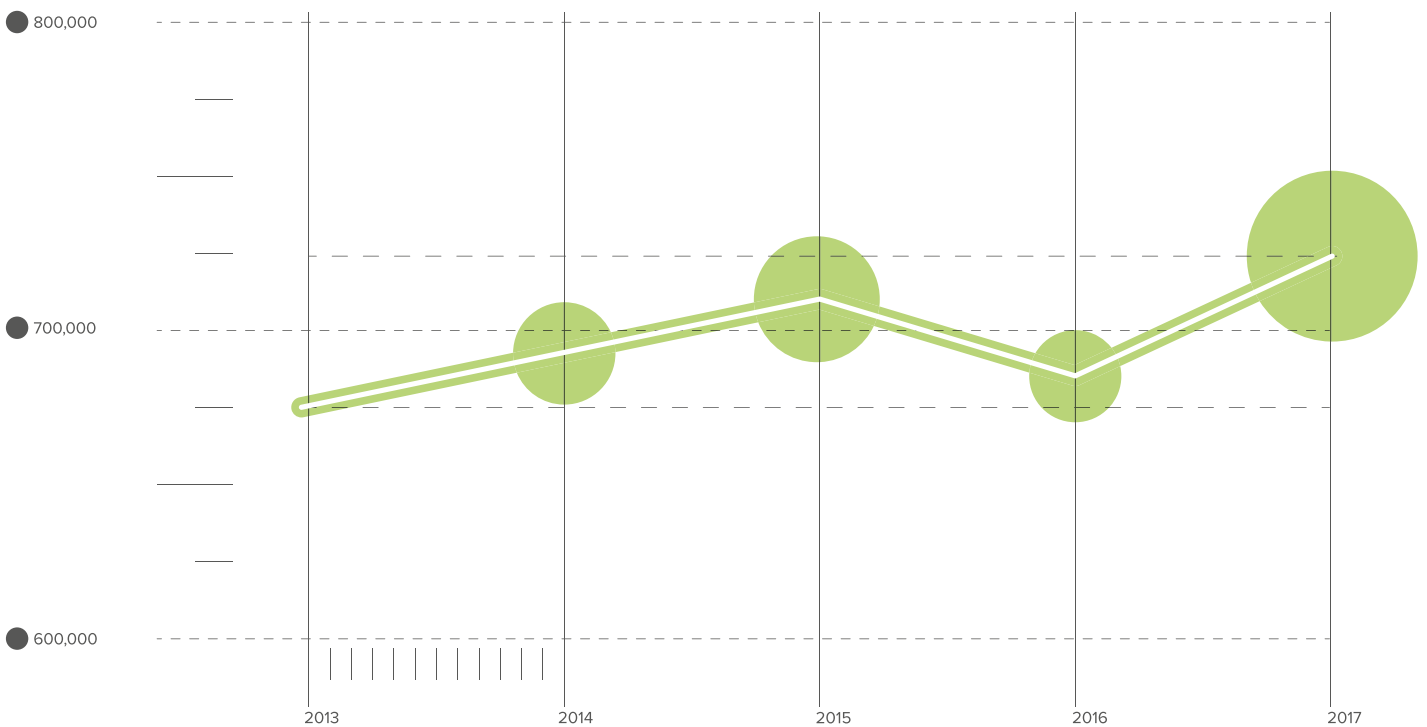
No two holidays are identical, but this table shows that in 2017, half of holiday visits to Jersey involved travel and accommodation being booked together, and half saw travel and accommodation bookings made separately.

More than half of 'combined' bookings were made using the internet and around six-in-ten were made with a travel agent or tour operator. For those booking travel and accommodation separately, travel was overwhelmingly booked direct with the carrier using the internet, while just less than four-in-ten accommodation bookings were made online, directly with the provider.

The Volume and Value of Tourism in Jersey 2017

After a sustained period of decline in the 1990s and early part of the last decade the overall number of visits to Jersey spent a few years treading water, but it can be seen that more recently the tide has started to turn, with 2017 seeing the highest number of visits since before the global financial crisis a decade ago.

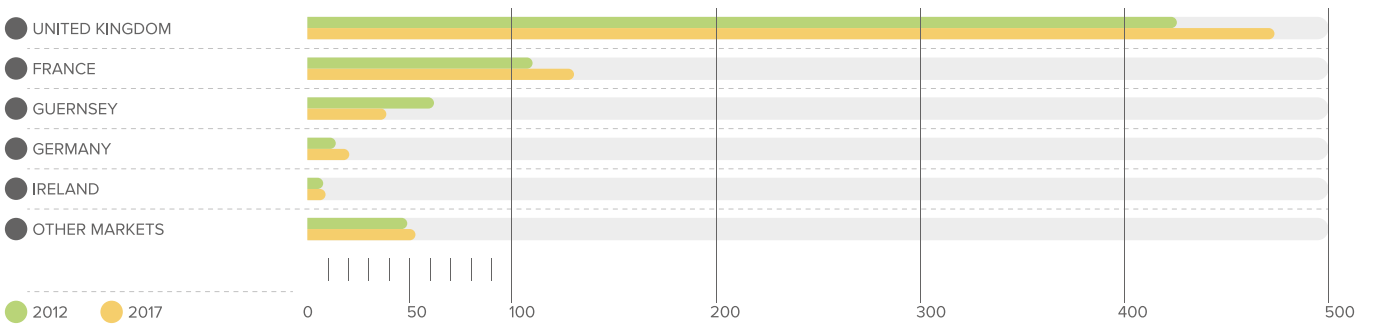
→ Trends in the Number of Visits to Jersey



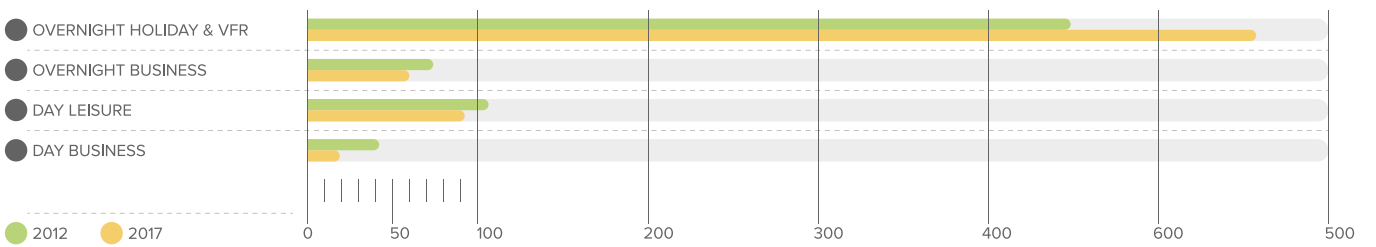
With the introduction of a continuous Exit Survey from summer 2016 in future we will be able to track like-for-like trends over time. It is not possible to compare the data captured now with historical data, except for in the most recent year that a standalone survey was undertaken, which was 2012. Even here only very limited meaningful comparisons can be made, but it is evident that there were more visits to Jersey from each of the major source markets in 2017 than five years earlier with the exception of from Guernsey, where volumes have fallen by more than one-third.

Looking at changes by broad journey purpose and whether or not the visit was an overnight stay or day trip it can be observed that growth has come from increasing numbers of overnight trips that are for Leisure (Holiday and VFR combined). By contrast the volume of overnight Business visits has fallen as has the number of day trips to the island, both for Leisure and for Business.

→ Visits by Country of Residence 2012 and 2017 (000s)



→ Overnight and Day Visits by Broad Purpose 2012 and 2017 (000s)

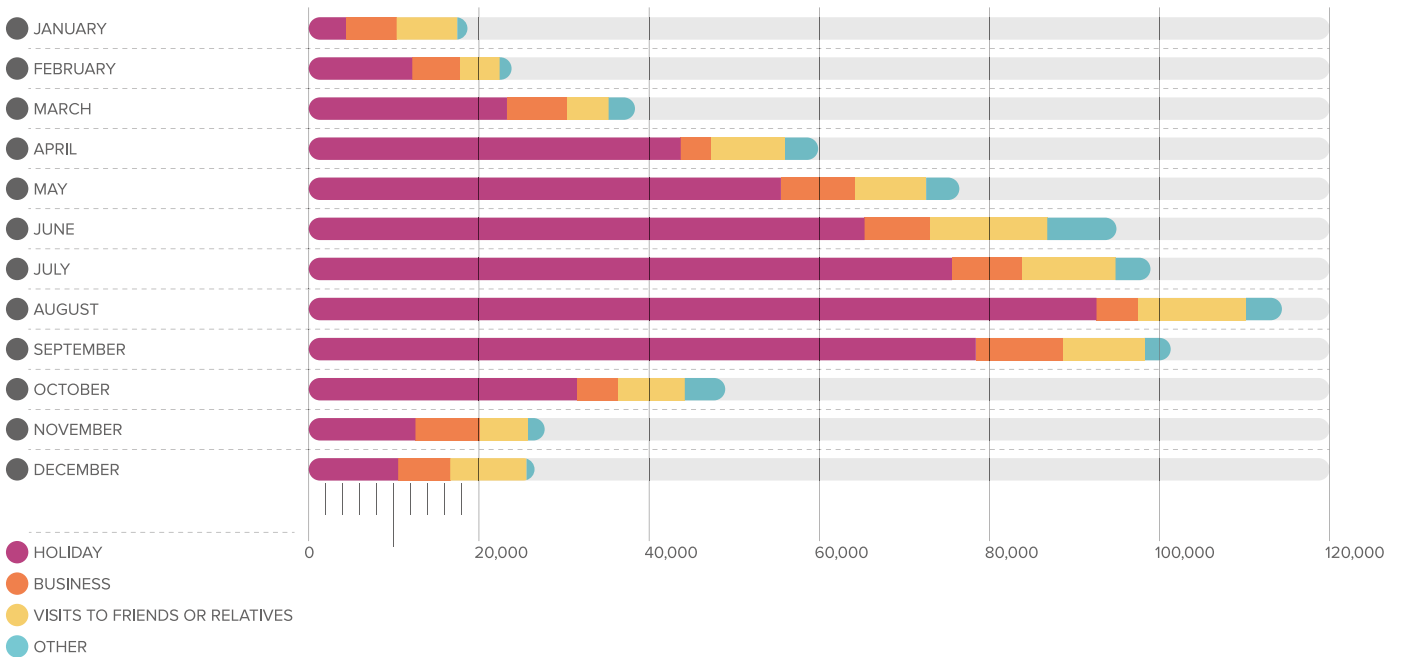


The Volume and Value of Tourism in Jersey 2017

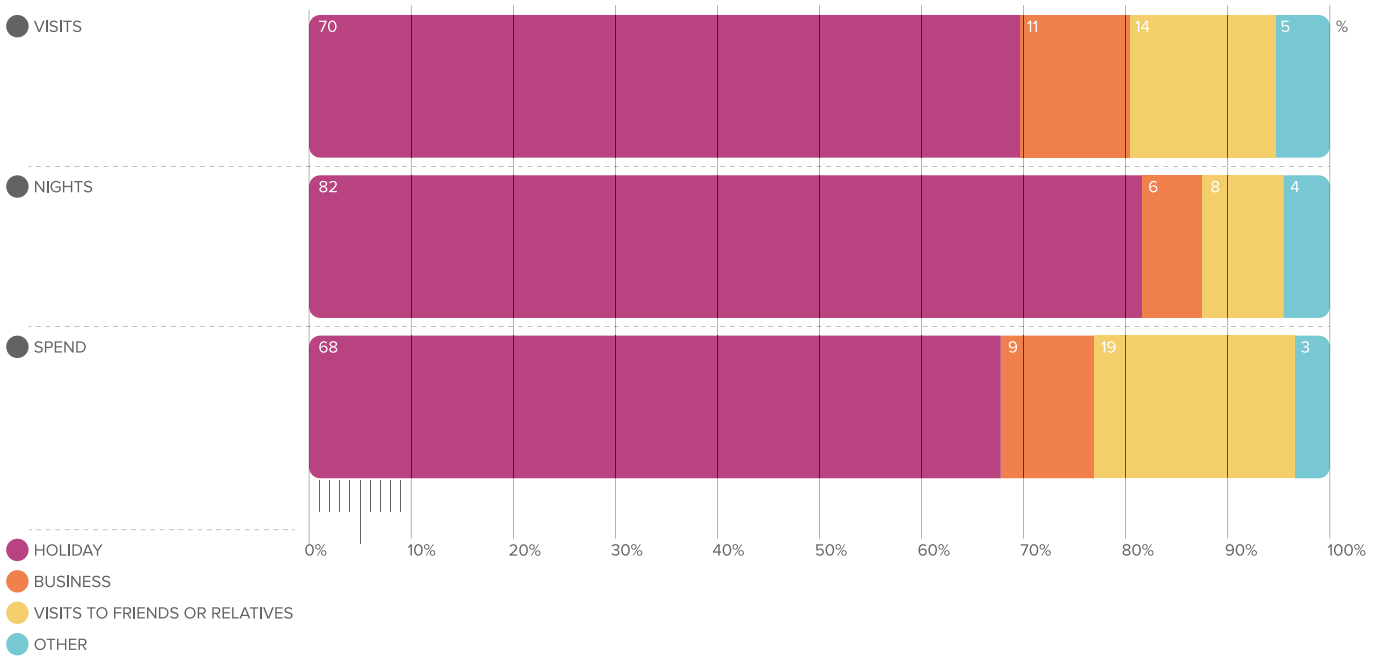
The peak month for visits to Jersey in 2017 was August with 114,000 and the quietest month January with 18,000. Focusing just on holiday visits, 19% took place in the first and fourth quarters with the remainder being between April and September.

Business visits are spread much more evenly across the year, demonstrating the importance of this market to our hotels, restaurants and other visitor economy businesses year-round.

→ Seasonality of Visits by Purpose

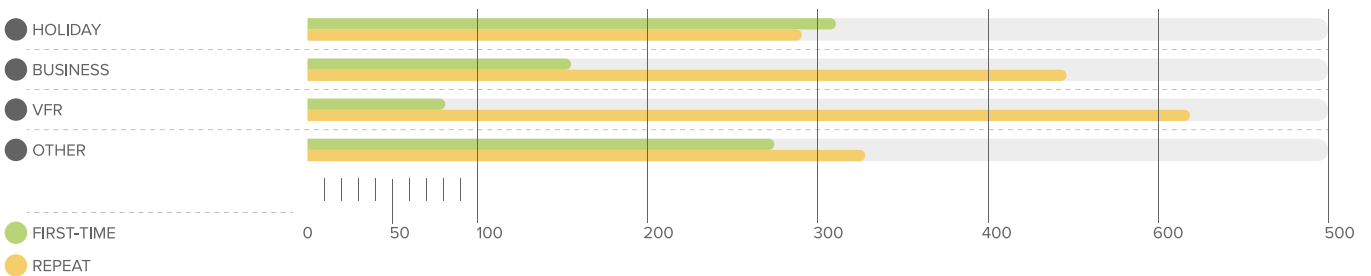


→ Purpose Mix



Visitors travel to Jersey for a host of different reasons, but 70% of visits, and some 82% of visitor expenditure on the island, come courtesy of those choosing the island as their holiday destination. As is common across most destinations with a higher length of stay, visits to friends and relatives generate a larger share of visitor nights than they do visits, or in particular, visitor spending.

→ First-time or Repeat Visit

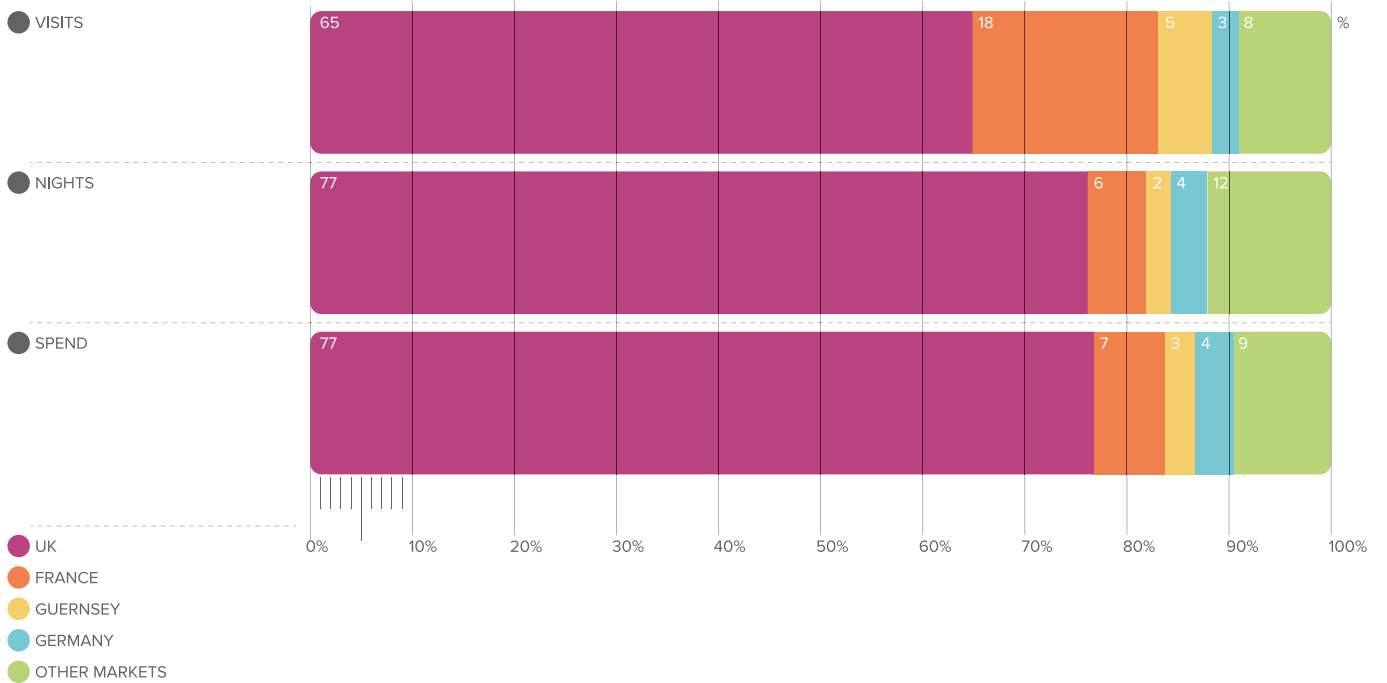


During 2017 just more than half of all holiday visits were by first-time visitors, while as one would expect, those travelling to the island for business or to visit friends or relatives were far more likely to be making a repeat trip.

The Volume and Value of Tourism in Jersey 2017

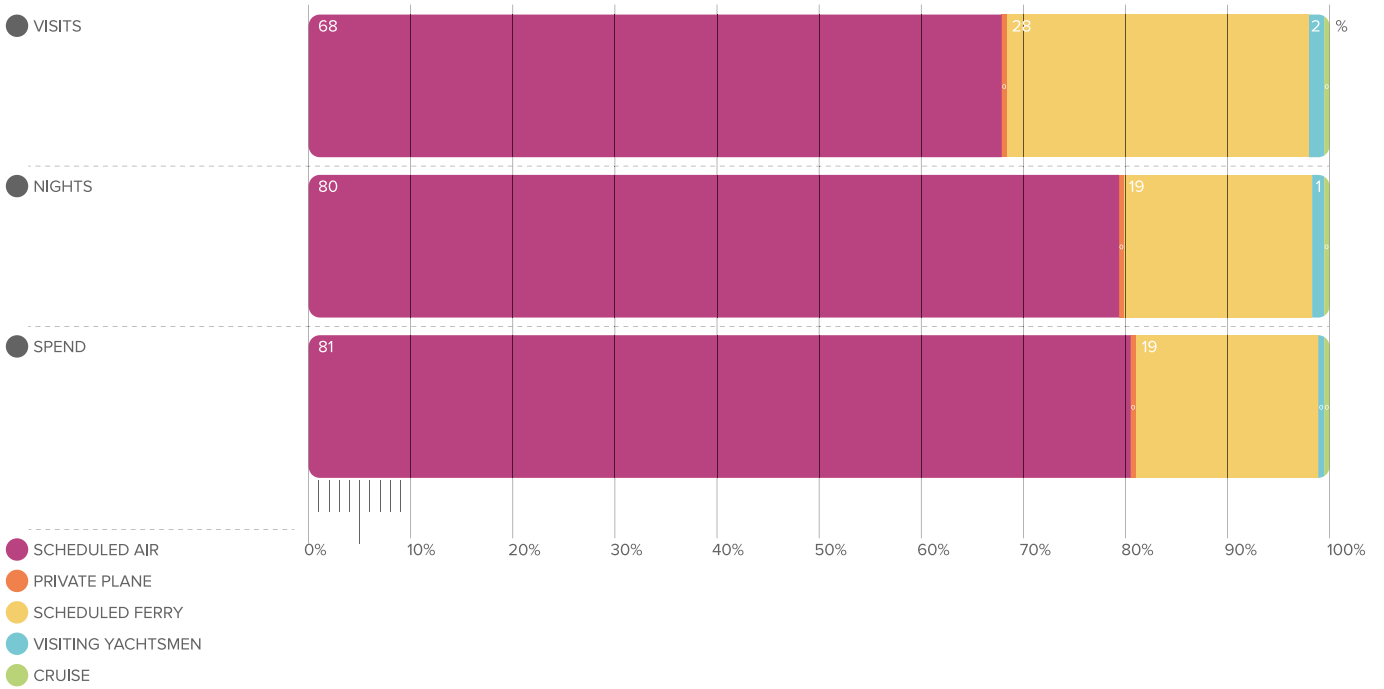
Very nearly two-thirds of visitors to Jersey live in the UK, with this market constituting more than three-quarters of visitor nights and expenditure. France represents 18% of all visits, but with a substantial proportion of day-trip visits the market represents a smaller proportion of visitor nights and expenditure.

→ Market Mix



Overwhelmingly visitors travel to Jersey by air, but scheduled ferry services remain the method of transport used by more than one-quarter of all visitors.

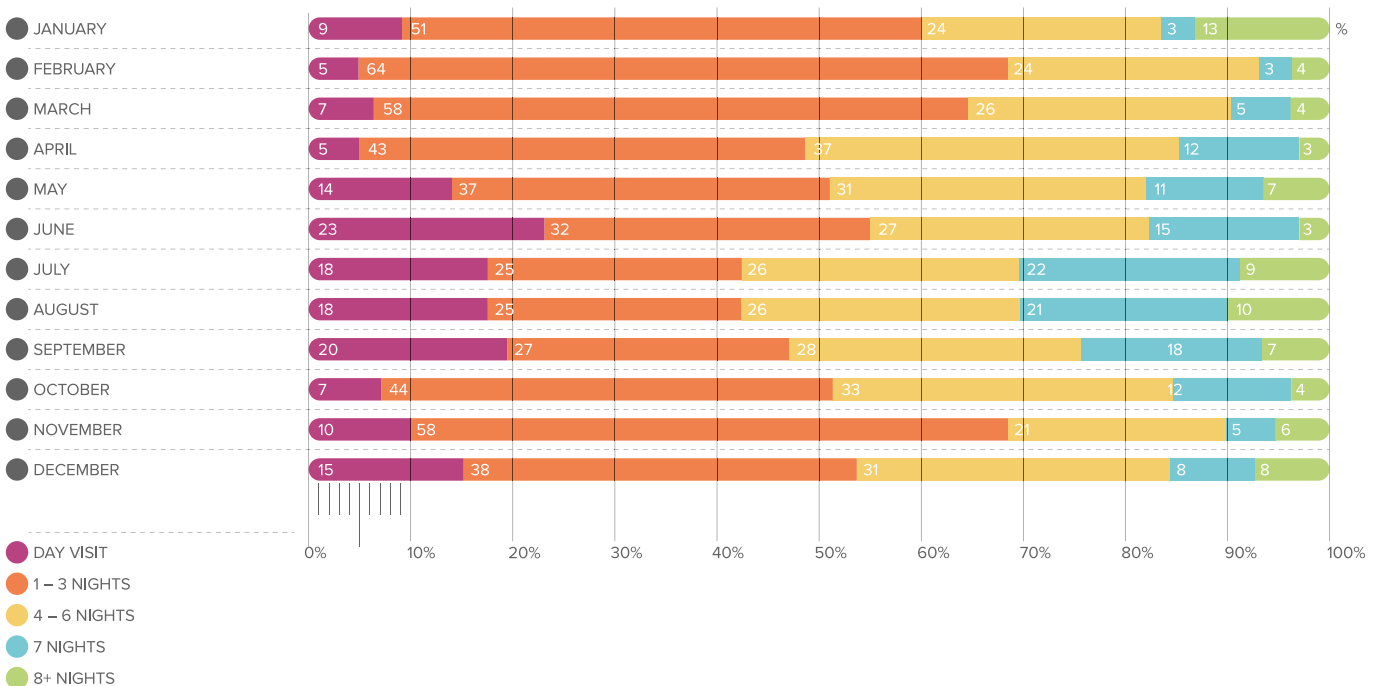
→ Mode Mix



The belief that every visitor comes to Jersey for seven nights is a myth. Just as is the case for destinations around the world while the seven-night holiday remains important, the real growth area is in short-break stays. Destinations that adapt their offer to cater for this opportunity are those that reap the rewards of a flourishing visitor economy. Even in the

peak summer months, only around one-in-five of visits last seven nights. As would be expected, the proportion of visits that last 1-3 nights is at its greatest from the autumn through to the following spring. Day-trip visits reach their peak share in spring and early summer.

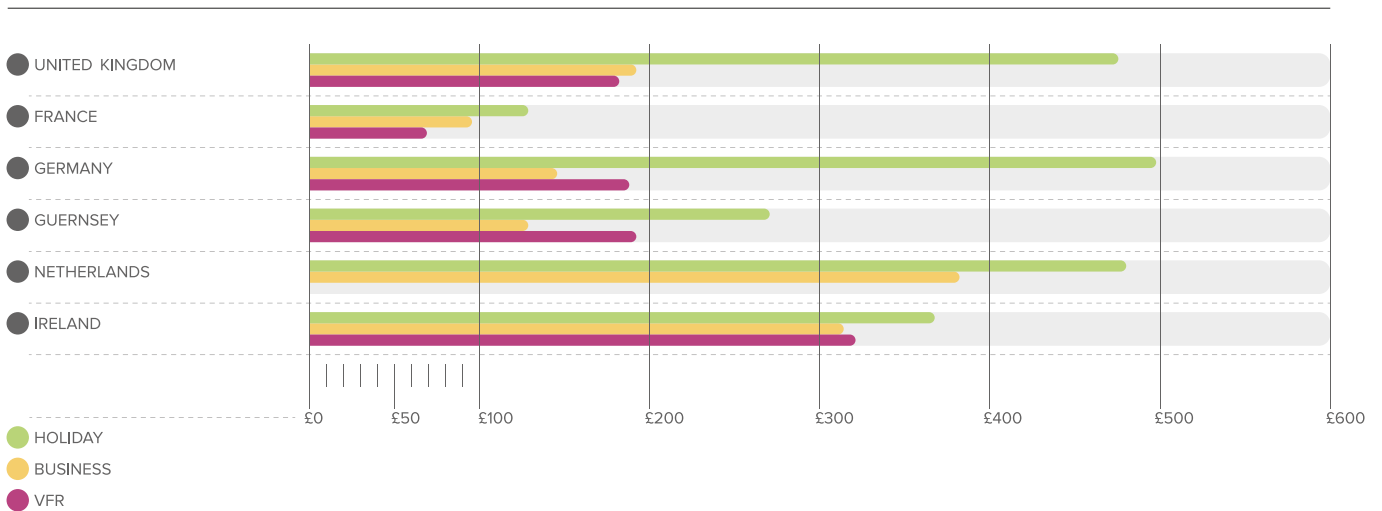
→ Duration of Stay Share by Month



The Volume and Value of Tourism in Jersey 2017

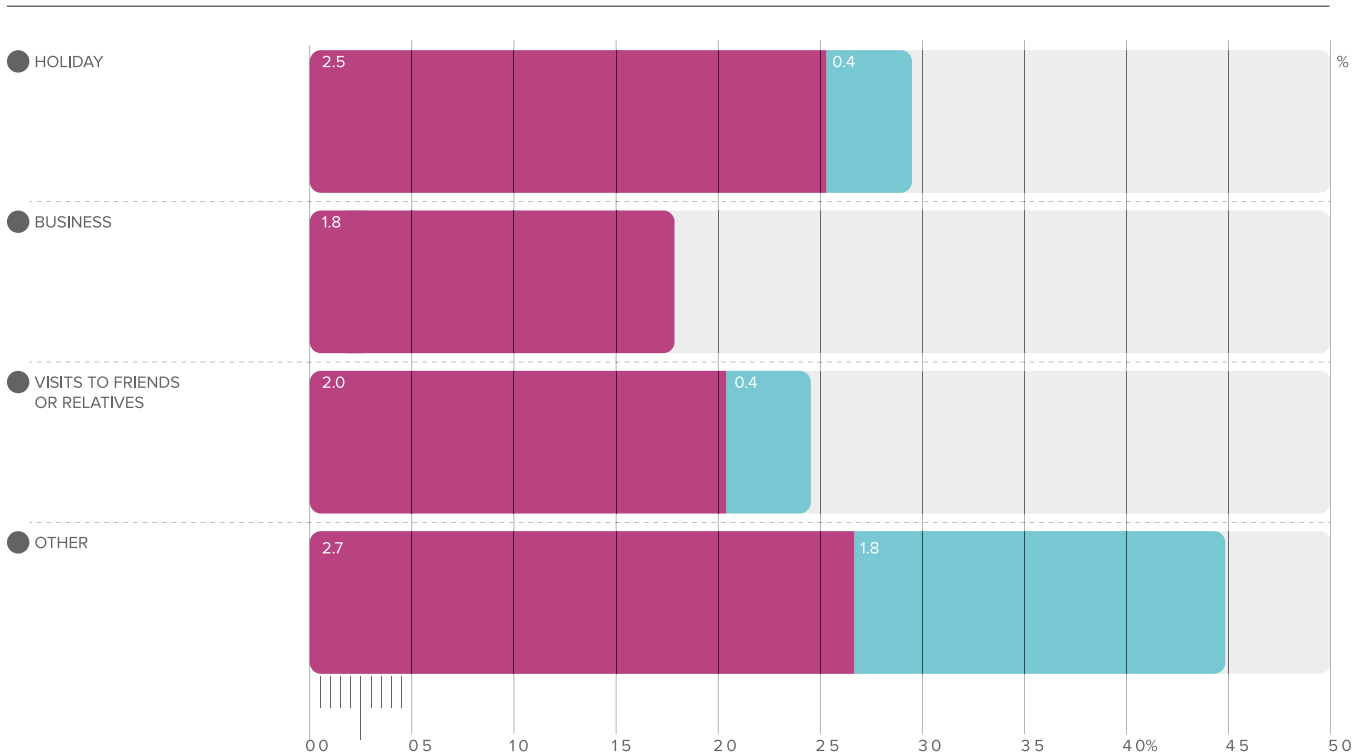
The typical holiday visit from the UK, Germany and Netherlands generates almost £500 of expenditure on the island, while holiday visits from both France and Guernsey have a lower average spend, driven by a shorter length of stay. Small sample size means that caution needs to be taken in results for Ireland and Netherlands visits that are for business or to see friends or relatives.

→ Average Spend per Visit by Purpose and Market



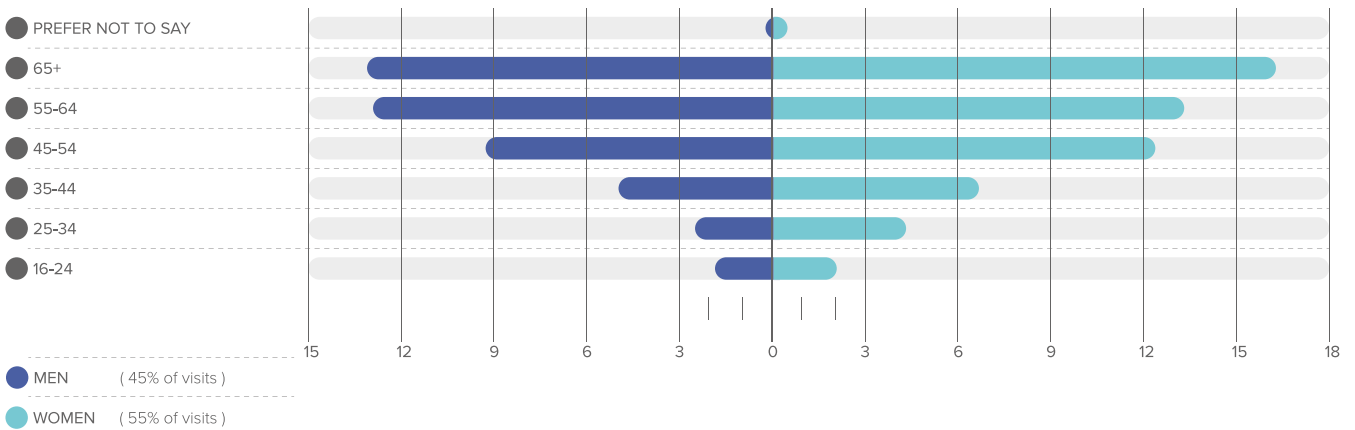
The typical holiday travel group is composed of 2.5 adults and 0.4 children, while in total 22% of holiday groups include children aged under 16. The 'Other' category includes those coming to Jersey for a study visit, including school trips, hence the higher average number of children in each group.

→ Travel Group Composition

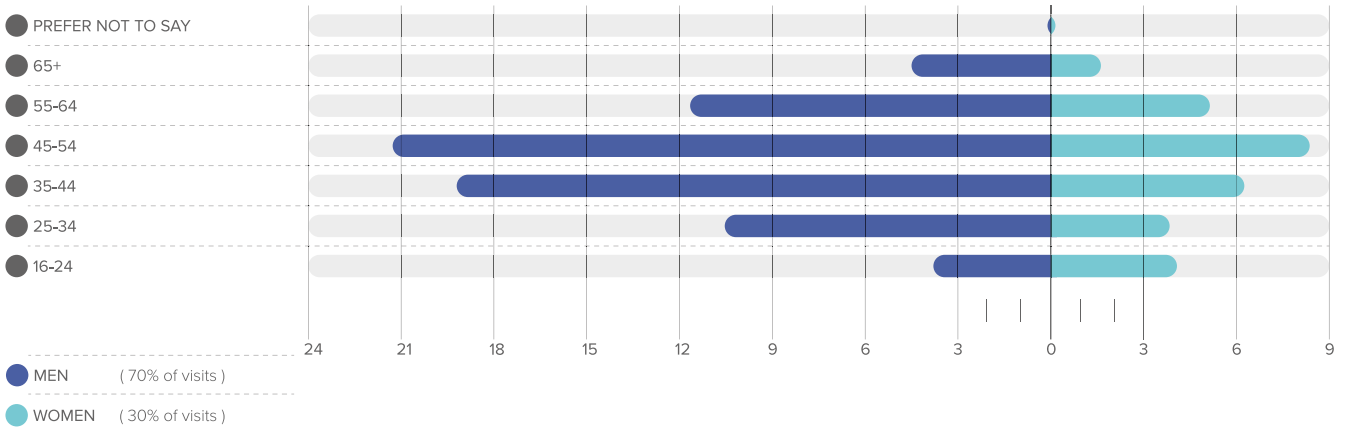


Those visiting for a holiday tend to be in their forties or older, with 29% being aged 65+. Business visitors are predominantly male, and most often found to be aged between 45 and 54. Almost two-thirds of VFR visitors are female and, as with holiday visitors, there is a more mature skew to the age distribution.

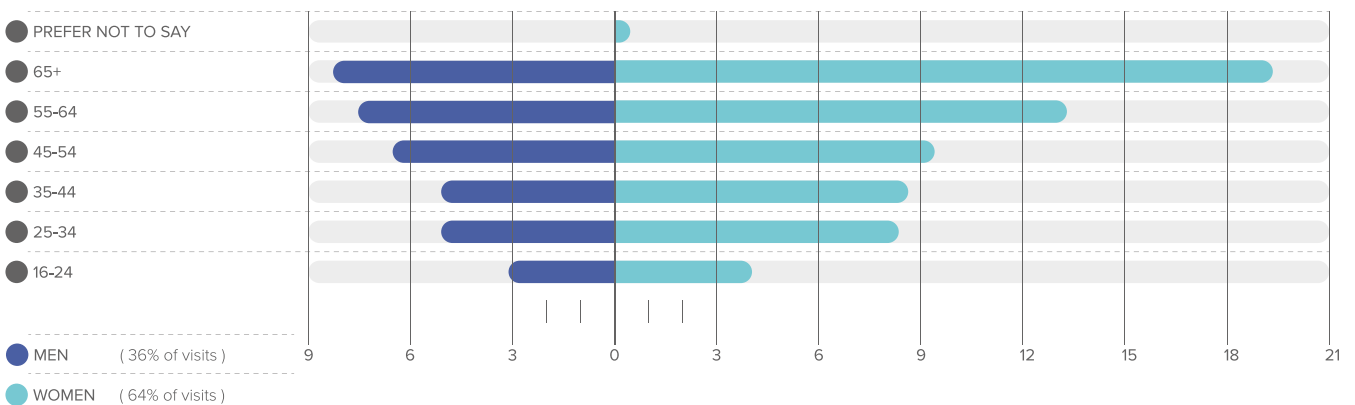
→ Demographic composition of adult Holiday Visits in 2017 (%)



→ Demographic composition of adult Business Visits in 2017 (%)



→ Demographic composition of adult VFR Visits in 2017 (%)

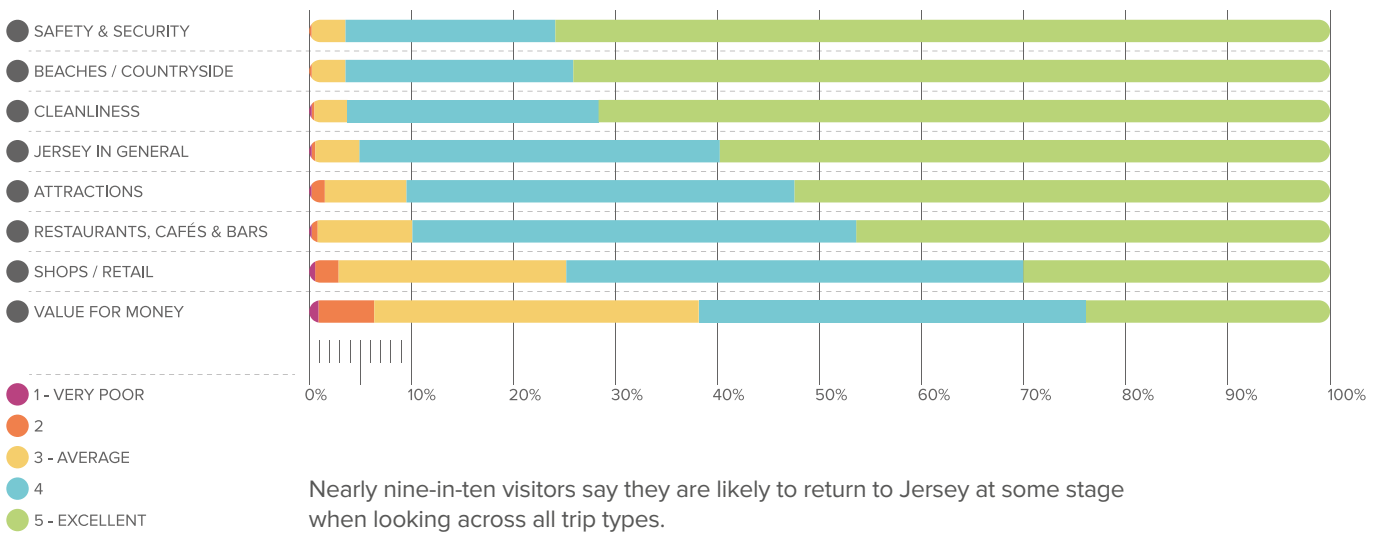


The Volume and Value of Tourism in Jersey 2017

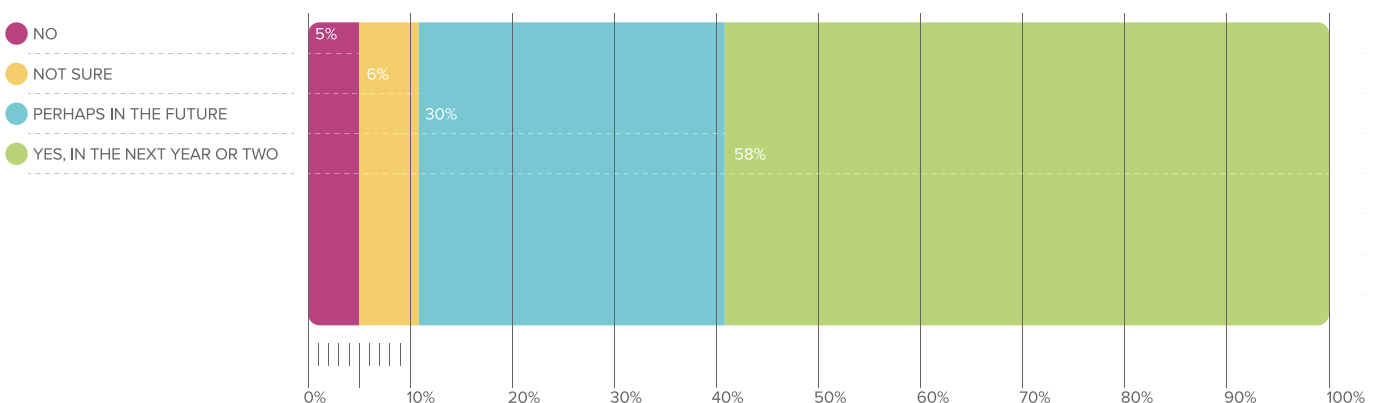
Those taking part in the Exit Survey are invited to rate different aspects of their trip to Jersey on a scale from 1 = Very Poor through to 5 = Excellent, revealing that departing visitors overwhelmingly had a positive opinion about their experience.

The highest average scores (4.7) were achieved for 'Beaches and Countryside', 'Cleanliness' and 'Safety and Security'. Although still being scored highly, 'Shops and Retail' received a lower score of 4.0 and 'Value for Money' of 3.8.

→ Visitor Ratings

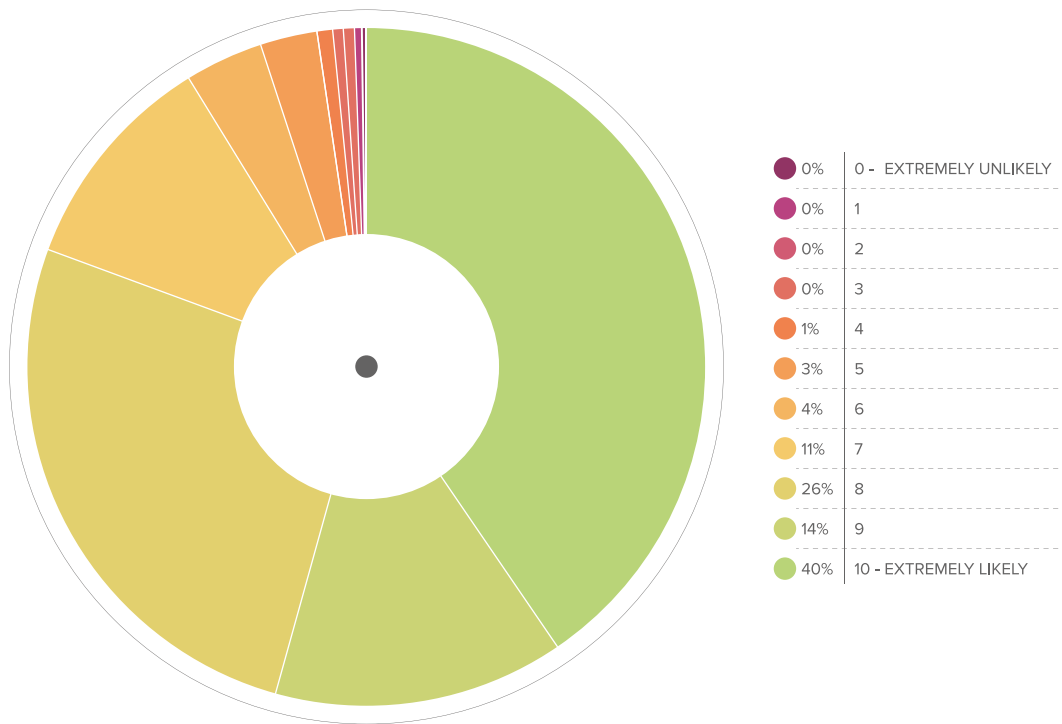


→ Likelihood of Returning to Jersey



In trying to figure out the way that people feel about a product, service or destination it is helpful to develop what is known as a Net Promoter Score. This looks at the likelihood to recommend, with the outturn metric sitting between -100 and +100, and while there is no 'golden rule', any supplier who finds that they have a negative Net Promoter Score needs to be concerned. In 2017 Holiday visitors to Jersey appear to have left with a strong intention of recommending Jersey to their friends and relatives as somewhere to visit for a holiday or short break, with an aggregate Net Promoter Score of 45.

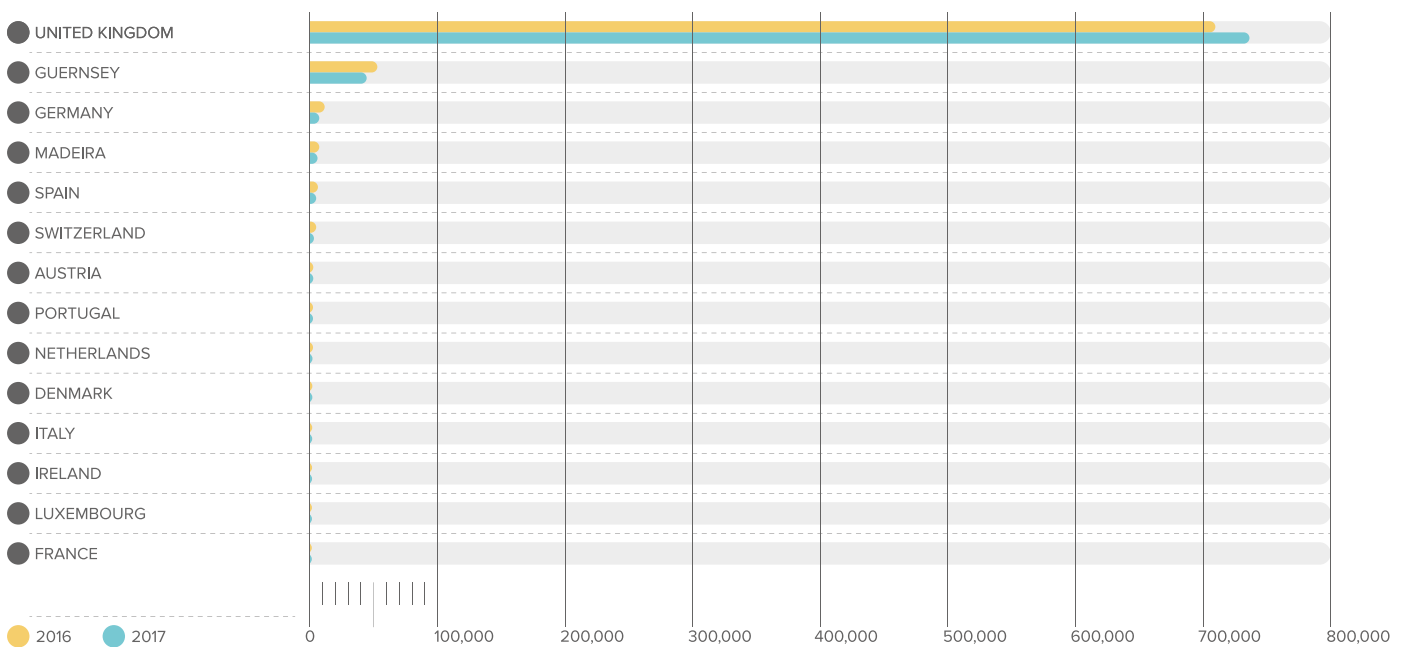
→ Likelihood of returning to Jersey among Holiday Visitors



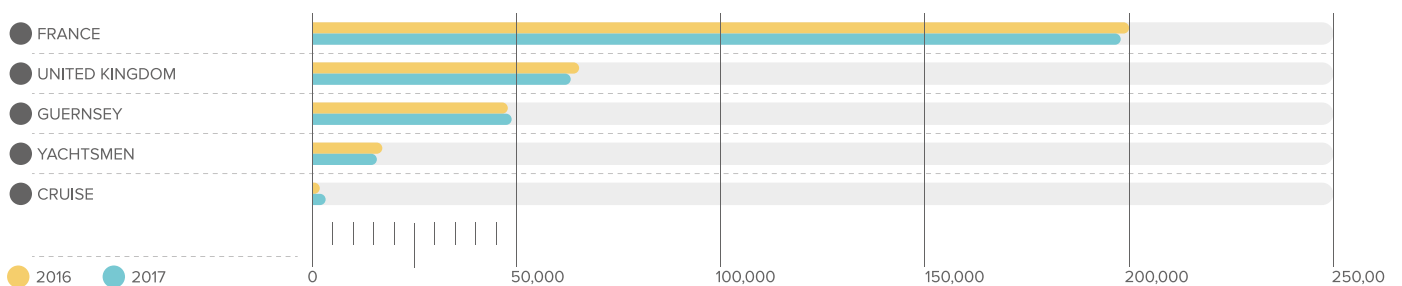
The Volume and Value of Tourism in Jersey 2017

Based on data compiled by Ports of Jersey that encompassed visitors and residents it is evident that the vast majority of arrivals at Jersey Airport are on routes that have originated in the UK and that this number enjoyed a considerable increase in 2017. By contrast the bulk of sea arrivals at Jersey Harbour are on routes that have originated in France and this number saw a slight decline in the past year.

→ Passenger Arrivals at Jersey Airport (Arriving Visitors and Returning Residents)



→ Passenger Arrivals at Jersey Harbour (Arriving Visitors and Returning Residents)





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