



# Together for Tourism

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07 February 2023  
The Royal Yacht Hotel

# Agenda

## Opening Remarks

Lisa Springate, Chair

## Minister's Message (Recorded)

Kirsten Morel, Deputy Chief Minister

## 2022 Overview & 2023 Plans

Claire Lyons, Interim CEO

## Q&A Panel Session

Ashley Proudfoot, Moderator

## Closing Remarks

Claire Lyons, Interim CEO

Drinks in Lazy Jack bar



# Importance of the Tourism industry

## Tourism's Contribution to Jersey.

⌘ **£280M**

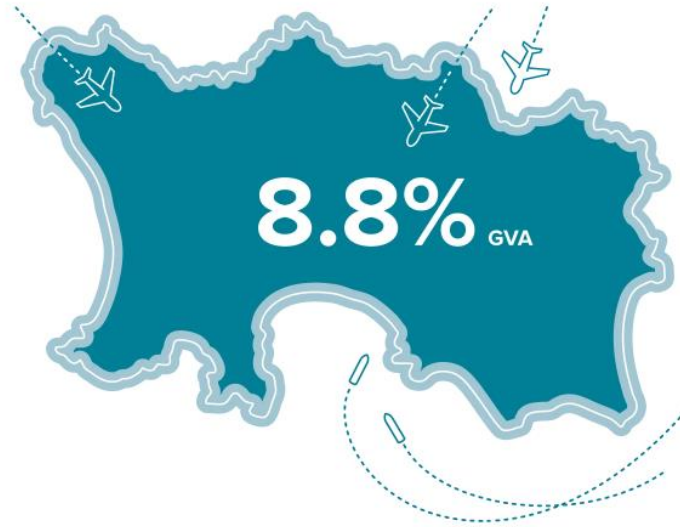
Over a quarter of a billion pounds were spent on the island.

🛏 **770,000**

Visitors to Jersey  
438,200 overnight stays

✈ **£14M**

14M pounds in GST generated by visitors



\*based on 2019 data (last full year of the Exit Survey data)



Opening remarks

# Challenging times

- Pandemic impact on travel sector and the visitor economy
- Brexit
- War in Ukraine
- Economy
  
- Key challenges in Jersey include:
  - Infrastructure
  - Bed stock
  - Skills shortage
  - Duration of licenses
  - Staff accommodation
  - Rising cost of living

# Opportunities & Collaboration

- 01 | Tourism is one of the world's biggest growing industries
- 02 | Change the view locally from negativity to positivity
- 03 | Shared vision to achieve success—working together as a community
- 04 | Ambition to improve perception, engagement and integration
- 05 | Develop Tourism Strategy for Q4



# Conclusion

- Tourism must grow and develop in Jersey in a sustainable, productive and coordinated way
- Tourism Strategy with a long-term vision is required
- Opportunity to grow a world-class enriching visitor experience contributing to all aspects of our community – economy, community and environment

Opening remarks

# News – CEO Appointment



Tricia Warwick



# Minister's Message

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Deputy Chief Minister and  
Minister for Economic Development,  
Tourism, Sport and Culture, Kirsten Morel





# Together for Tourism Visit Jersey - 2023 Business Plan

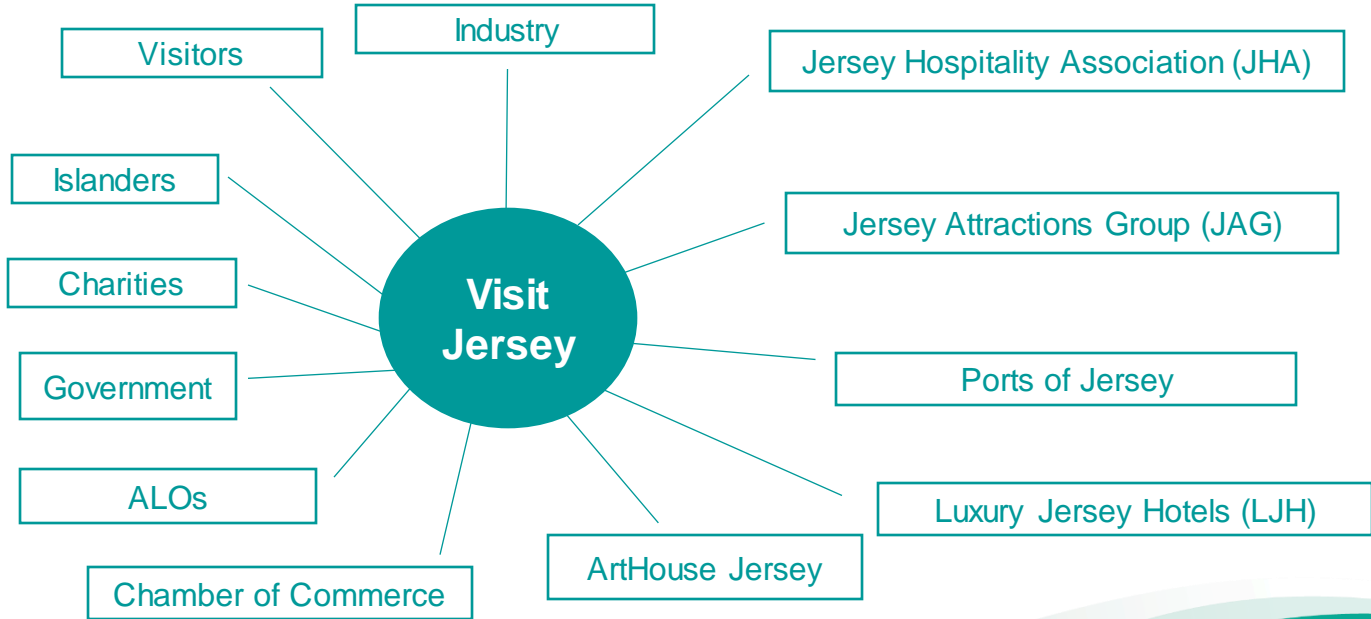
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Claire Lyons, Interim CEO

# Visit Jersey's role

## Our five pillars

1. History & Heritage
2. People & Culture
3. The Great Outdoors
4. Local Food
5. Active & Wellbeing

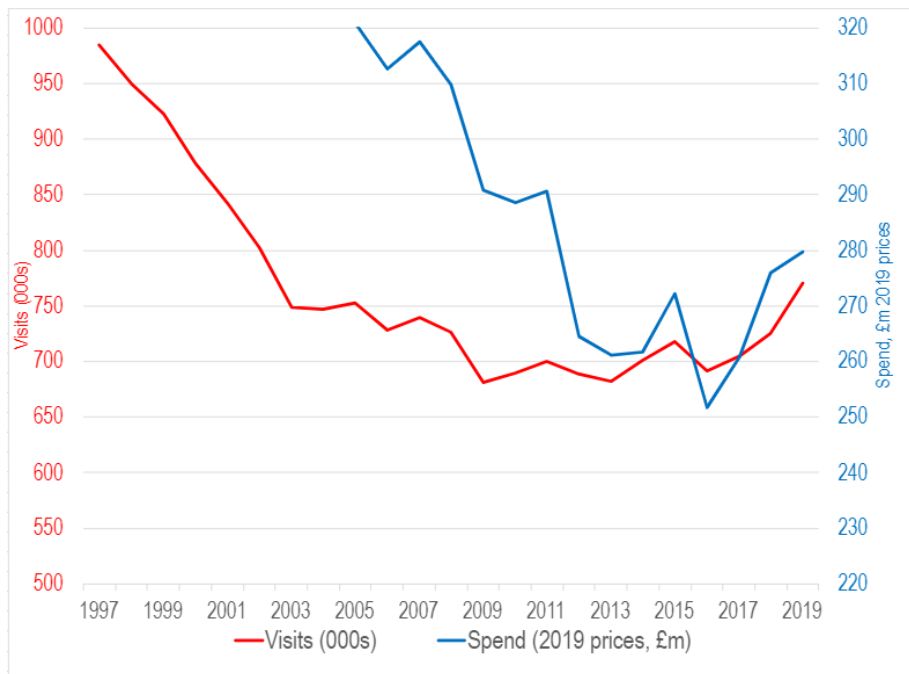




# 2022 in Review

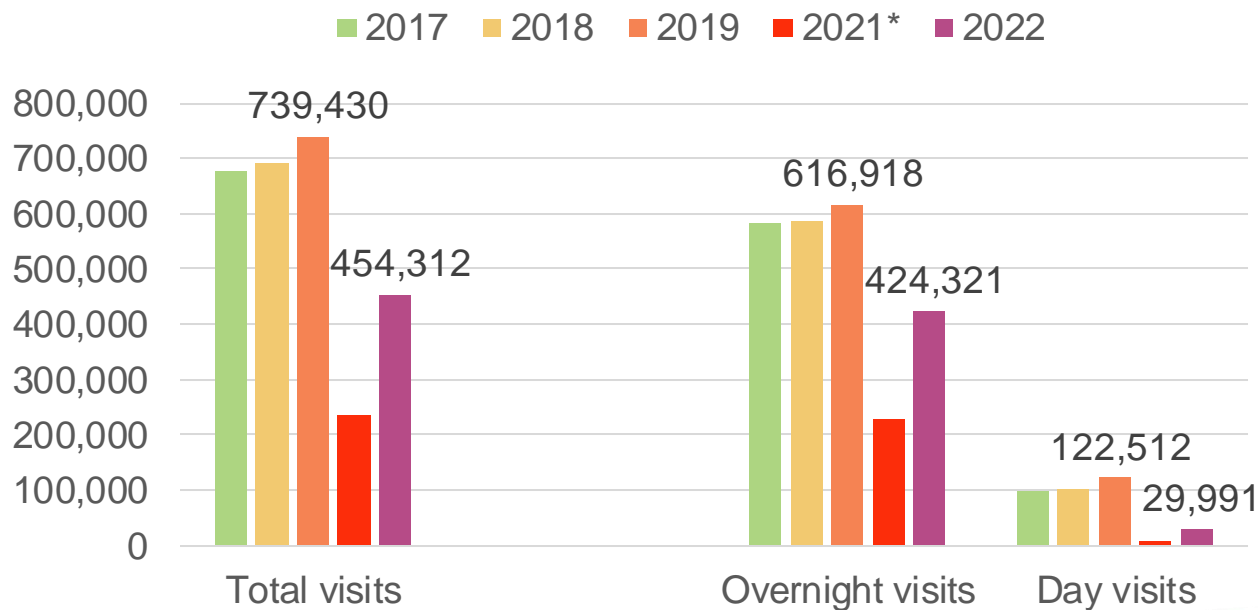
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# Tourism over Time



# Exit Survey Jan-Nov - Recovery of total visits sits at 61% of 2019 levels

Jan-Nov	
Year	Avg. length of stay (days)
2017	4.8
2018	4.4
2019	4.3
2022	4.9



# Exit Survey Jan-Nov - UK visits have recovered to 73% of 2019 levels

2022 Jan-Nov recovery as a proportion of 2019 levels



**73%**



**29%**



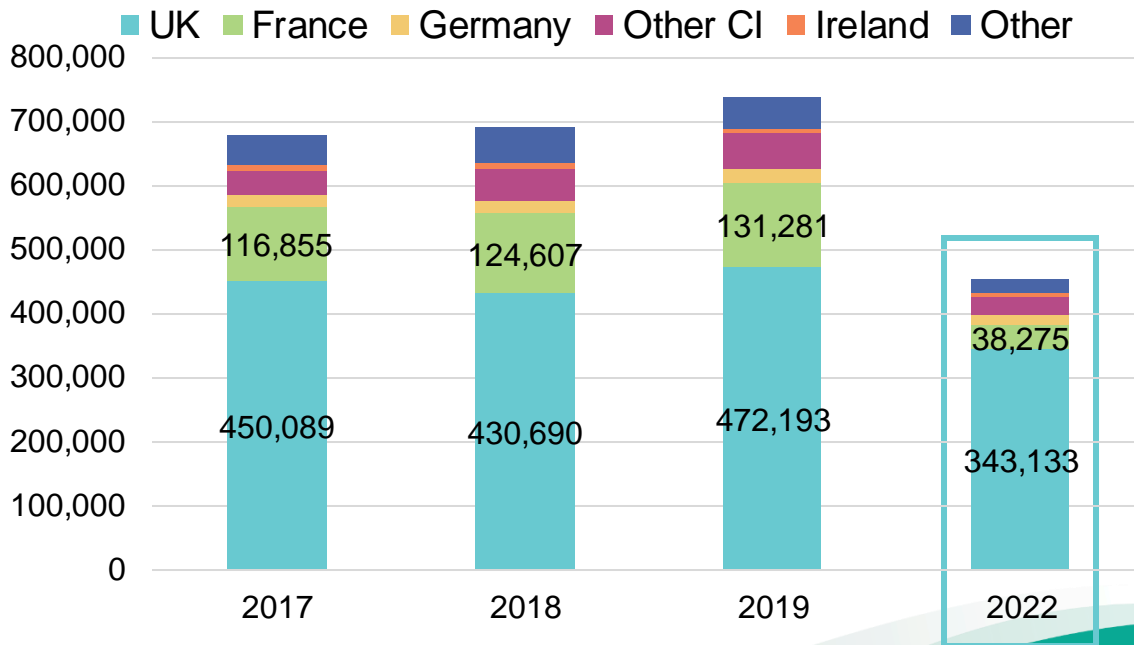
**76%**



**48%**



**90%**



# Autumn Campaign 2022

63%

Appeal from the UK audience (up from 45% without seeing advertising)

8,333

Partner referrals generated

48.9k

Visitors to the Visit Jersey website from campaign activity – 20% of all website traffic

21k

Entered competition to win a holiday to Jersey

# PR activity



The Daily Telegraph

580+

Proactive PR articles in top tier publications

55+

Media and trade partner trips



Digital Tourism Think Tank “Design & Placemaking Award”

'A clear example of a small destination punching above its weight'



Countryfile & Villages By the sea

Major national broadcast coverage





2022 review

# Global Outlook

- Visit Britain's 2023 forecast for inbound tourism shows continued strong recovery, with higher spend per trip
- American Express research tells us travel intent is on the rise
- Key concern for travellers is inflation, but they are prioritising spend on travel

# 2023 Travel Media Trends + Themes



- Regenerative travel
- Flight-free (or 'flight light') travel



- 'Transformation' retreats
- Wellness tourism (e.g. 'sleep travel')
- 'Lisness' is the new 'bleisure'



- Biodiversity breaks
- 'Set-jetting' (travel to film/TV locations)



- Sustainable (and younger) luxury
- Airbnb pushback

# Key areas of Focus

- 01 | Driving awareness to promote tourism to and within Jersey
- 02 | Customer experience- maintain high net promoter scores
- 03 | Improve productivity by stretching the season
- 04 | Develop our sustainability credentials to meet the needs of our visitors, government and islanders
- 05 | Optimise our effectiveness to drive appeal and conversion
- 06 | Drive efficiencies to maximise all our resources



# Visitor Information Services

Our aspiration is to provide information to improve the visitor experience and increase visitor spend.

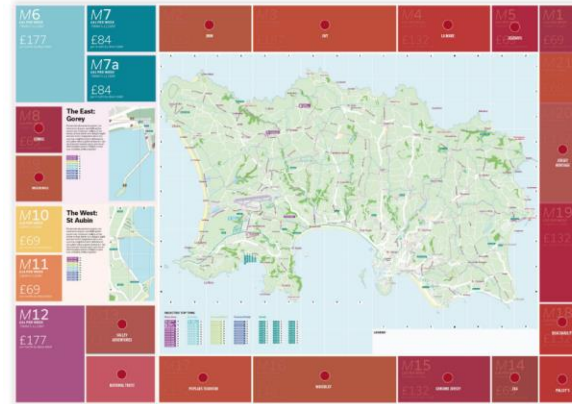
Future approach:

- Welcome Executives
- Chatbot and live chat
- Micro visitor centres
- Training schemes and staff passes for partners
- Revamp of the What's on Guide and Visitor Map

OFFICIALLY JERSEY'S  
MOST PICKED-UP MAP

EXCLUSIVE DISTRIBUTION AT THE  
AIRPORT AND HARBOUR

UPDATED FOR 2023 AS  
FIVE MAPS IN ONE





2023 plan

# Destination Jersey

- A bi-annual travel trade and business events workshop to promote tourism in Jersey
- 09 -11 October 2023
- Day 1 – Welcome Reception
- Day 2 - 'Business Speed Dating' with a guest speaker and gala dinner
- Day 3 – Bespoke FAM Trips

# Sustainable Tourism

Aligning with government strategy performance framework and reviewing our sustainability credentials as a tourist destination.

Visit Jersey has a role to play in:

- Becoming carbon neutral by 2030
- Delivering net-zero emissions by 2050

Research shows that visitors are increasingly making more sustainable travel choices. We can support our partners:

- To understand and promote their sustainability initiatives
- By sharing insights and toolkits



# Best Prospects



**AUTHENTIC  
ADVENTURERS**



**CULTURE  
CHASERS**



**EASY  
EXPLORERS**



**MOMENT  
MAKERS**

Our positioning aims to tap into the motivational drivers of our core customer segments, stretching the season through inspiring storytelling and reasons to visit.

# Industry Partnership Programme

- Opportunity to **offer added value** for partners
- **Generated revenue is reinvested** to the industry and visitor welcome
- **90 opportunities** available throughout 2023
- Launched **November 2022**
- Priority placements **drive increased referrals** to the partner's site from targeted audiences
- **75%** of opportunities have already been sold





# Deeper Connections

- Condor Ferries are increasing their UK, Jersey and France capacity throughout 2023
- Emerald Airlines are taking off from Belfast to Jersey from May 2023
- EasyJet are operating services between Jersey and Amsterdam and Edinburgh from April 2023
- Working closely with Tour Operators to drive brand advocacy



2023 plans

# Increasing Engagement

19.92m

ABC1 UK adults reached

3.5m

EAV in the UK

52

FAM trips

1.5m

Website visitors

50+

Events being supported

27

Access and Trade partner  
campaign (2 EU)

\*KPIs for 2023



2023 plan

# Challenges ahead

- Pandemic impact on travel sector and the visitor economy
- Key challenges that have emerged:
  - Shortage of bed capacity
  - Skills shortage
  - Duration of licenses
  - Staff accommodation
  - French ID issue
  - Rising cost of living
  - Perception of importance of the visitor economy
- Advise and support the Minister and our partners to address these issues

A scenic coastal landscape featuring a sandy beach on the left, turquoise water in the center, and a rocky island with a stone tower on the right. The sky is clear blue. The text "Together for Tourism" is overlaid in the center.

# Together for Tourism