



VISIT JERSEY BUSINESS PLAN
2023

2023 Business Plan

Marketing Strategy

Our marketing strategy focuses on the key drivers of growth, building back a stronger, more sustainable Visitor Economy and is very much year of continued recovery. Our strategy will focus on supporting the Government's objectives and 2023 Q4 Tourism Strategy that will deliver our ambitions and vision for the future.



We will focus on our purpose of **Promoting Tourism to and within Jersey** to our target customers, driving a vision of a more profitable, productive and sustainable visitor economy.

The years since 2020 have been dramatic in the revolution of our tourism industry. We will work with Government and stakeholders to support the Government Plan and its new Tourism Strategy for our island and review and reset Visit Jersey's own strategy and Destination Plan to renew our business for the future.

Target Audiences

We know that when visitors come to Jersey, we achieve high net promoter scores and visitor satisfaction levels, so a key driver for our strategy will be to attract new visitors to the island. We will continue to target our **best prospect target markets** from the UK, Germany and France to widen our prospective customer base of **25 million people** from these countries, positioning Jersey to these audiences to drive appeal and motivation to visit Jersey. We will also include Ireland within our plans for 2023 given the increase in access and the ease of getting to Jersey as part of the CTA.

Campaign tracking in 2021, has demonstrated the success of the 'Jersey. Curiously Brit...(ish)' advertising in driving appeal to the UK market (shifting appeal of Jersey from 48% to a staggering 69% when the ad is seen), demonstrating that the campaign positioning is working exceptionally well.

Our core market, the UK, will continue to be the primary focus of activity, but of particular challenge currently and in the years ahead, is the loss of visitors from France, which not only affects our visitor economy, it also has had a dramatic impact on our retail industry too. During 2023, we will undertake research and analysis on how best to recover this market and also look to other countries we can target that can make up for the volume of visitors who are more like to stay longer and have a positive impact on nights and revenue.

Seasonality

Key to productivity and the sustainability of our visitor economy will be targeting travel outside the main peak travel months, in the shoulder periods, to stretch out the season and encourage visits in spring and autumn, where we know that hotel occupancy rates are not as high as the summer. We know from our customer segmentation research that our best prospect target audiences are more likely to be encouraged to travel during these periods and Visit Jersey will build a programme of events and activities to promote and encourage more reasons to visit in the shoulder periods. As part of the forecasting work undertaken with Tourism Economics, we know how critically important it is to stretch the season and encourage travel during the shoulder months to optimise occupancy and productivity. Key to achieving this objective will be our **Content Calendar**, promoting experiences during the off-peak months to inspire and encourage more visitors during March, April, May and October. We have also developed a **suite of assets** promoting things to do and reasons to come to Jersey during spring and autumn. Events will play a key role in driving visitors to Jersey in the shoulder seasons too. Whilst the planning and organisation of this activity falls outside Visit Jersey's remit or expertise, with the right lead-time and range of events that will appeal to our target audiences, we will support through marketing and promotion in collaboration with the organisation or department that will be responsible for delivering a compelling and commercial Events Strategy.

Marketing Focus

Our marketing strategy will be supported by four key pillars to drive our plans: -

- **Consumer Marketing:** to grow destination awareness through brand positioning and advertising, acquisition of new, best prospect segments and tactical activation to stimulate bookings to Jersey. We will continue the focus on driving additional earned media, using the power of PR to widen our reach and appeal. Transforming our digital marketing through a digital roadmap to optimize the user journey and booking conversion.
- **Access, Trade & B2B Marketing:** supporting Jersey's connectivity recovery through partnership marketing activities that leverage the power of partner brands to reach new audiences more efficiently and effectively to complement VJ's activity. Providing effective sales platforms for Trade, giving the best possible toolkits to allow them to take Jersey to market.
- **Industry, Product & Events Marketing:** driving competitiveness and productivity, optimizing supply and demand and being the voice of the consumer to help industry develop their products and experiences for local and overseas visitors.
- **Research & Insight:** providing evidence-based insight into the performance of tourism to the economy and identifying consumer needs and trends to help develop strategy.

2023 Corporate Priorities & Deliverables

Objectives

Our objectives in 2023 will focus on 6 key areas to deliver against our vision of a more profitable, productive and sustainable tourism industry: -

1. Driving **AWARENESS** to promote tourism to and within Jersey.
2. Ensuring we meet the needs of our visitors and working with industry to deliver outstanding **CUSTOMER EXPERIENCE** and high NPS, always ensuring we put customers at the heart of everything we do and respond to their needs and changing trends.
3. Improving **PRODUCTIVITY** by encouraging out of peak-season travel to stretch the tourism year. Developing our **SUSTAINABILITY** credentials, with particular focus on the environment and Jersey's net-zero ambitions to meet the needs of our Visitors, our Government and Islanders.
4. Optimising our **EFFECTIVENESS** to drive appeal, conversion and ROI.

Striving to be as **EFFICIENT** as possible to maximise all our resources, both financial and human, and collaborating with Jersey businesses to position Jersey externally and support our shared ambition.

Core KPIs 2023

*Please note that Visit Jersey does not have sole responsibility for some of these visitor metrics which are reliant on many variables such as seasonality, connectivity, socio-economic and geo-political factors. We will be able to evidence how we have contributed to and have influenced the results in terms of the visitor economy's performance.

CSP	Minister Objective	VJ outcome	VJ Indicator	2023 KPI
Economy – jobs and growth	1	Visitor volume and Spend	Overnight holiday visitors	323,000 (2022 actual:263,000)
Economy – jobs and growth	1	Visitor volume and Spend	Holiday visitors total bed nights	1.45m (2022 actual:1.32m)
Economy – jobs and growth	1	Visitor volume and Spend	Visitors spend	£297m (2022 actual: £237m)
Economy – jobs and growth	1	Visitor volume and Spend	Total visits	577,000 (2022 actual: 473,000)
Economy – jobs and growth	1	Visitor volume and Spend	NPS score	Net Promoter score for holiday visitors maintained at 71 or higher
Economy – jobs and growth	1	Seasonality	Exit Survey*	Compared to 2022, growth of total visits is higher in the shoulder months seasons (April, May and October combined) than in the peak season (June, July, August and September combined)
Economy – jobs and growth	1	Seasonality	Spring/ Summer campaign delivery	1% uplift in appeal of Jersey for each core segment
Economy – jobs and growth	1	Improved efficiencies and maximising resources	Staff development programme	Staff retention less than 15% of 2022 turnover and staff satisfaction with Visit Jersey as a place to work – A good or excellent survey rating remaining at least 80%

CSP	Minister Objective	VJ Outcome	VJ Indicator	2023 KPI
Vibrant & Inclusive Community	8	Increased brand awareness and engagement	PR programme	365 proactive PR stories to Tier 1 media - all top-level newspapers, travel supplements and travel related publications that reach best prospects to promote awareness amongst our 4 key market segments
Vibrant & Inclusive Community	8	Increased brand awareness and engagement	Website and social performance	10% uplift in website visitors on 2022 actuals and 15% increase in followers on Facebook and Instagram and increase in engagement (Facebook Followers 110k • Facebook Engagement 5% • Instagram Followers 33k • Instagram Engagement 9%)
Vibrant & Inclusive Community	8	Increased partnership engagement across access and trade	Partner engagement programme	Training of 1,100 industry professionals in the UK and Europe
Vibrant & Inclusive Community	8	Increased partnership engagement across access and trade	Partner engagement programme	25 and 2 EU specific access and trade partner campaigns with annual MIK or matched investment to the value of £550k
Vibrant & Inclusive Community	1	Improved efficiencies and maximising resources	Visitor Information Services delivery	Q1 live chat implementation, hackathon workshops and welcome executives in situ
Vibrant & Inclusive Community	1	Improved efficiencies and maximising resources	Visitor Information Services delivery	Q2 Liberty Bus Hub, harbour presence and information hubs implementation
Vibrant & Inclusive Community	1	Improved efficiencies and maximising resources	Visitor Information Services delivery	Visitor satisfaction with information services maintained or increased against 2022 benchmark of 85% (satisfied or very satisfied)
Environment	1	Increased sustainable tourism focus	Sustainability Plan	End Q2 - Delivery of sustainability plan.

Our 2023 Activity Plan in Detail

Like in 2021, given the limited number of KPIs we were able to track in the 2022 Business Plan, Visit Jersey put in place marketing KPIs to measure output, effectiveness and efficiency. We have done similar below for 2023.

MARKETING		
Objective	Activity	Measurement
Awareness	Create inspirational campaigns that reach best prospects to promote awareness amongst key target markets and stretch Jersey's seasonality by driving bookings in spring, summer and autumn 2023.	<ul style="list-style-type: none"> • Increase appeal of Jersey for each of the core visitor segments by +1% point by December 2023 (targeting +3% by December 2023). • Reach 19.92m* ABC1 UK adults in 2023 • Authentic adventurers 53% • Culture chaser 56%, Easy Explorers 51% & Moment Makers 43%
Awareness	Through PR and earned media, focus on trophy PR pieces, top tier endorsement and high-profile talent opportunities. Position Jersey as the #1 short-haul destination in 2023.	<ul style="list-style-type: none"> • Achieve 365 proactive PR articles in the UK in Tier 1 media and established industry publications. • Achieve £3.5m EAV in the UK. • Deliver 52 hosted media/influencer fam trips/visits • Target 3 Broadcast opportunities in main channels.
Awareness	Develop and curate relevant content to promote awareness, engagement and advocacy about what Jersey can offer as a holiday destination to both incoming visitors and Islanders.	<ul style="list-style-type: none"> • Deliver 44 stories through VJ's marketing channels in 2023.

DIGITAL		
Objective	Activity	Measurement
Effectiveness	<p>Build on VJ's SEO strategy to develop jersey.com's search prominence based around key search trends.</p> <p>New approach to session management across websites for tracking cookies and remodelling analytics in GA4.</p> <p>Refresh visitchannelislands.com to attract wider web traffic and direct visitors down the conversion funnel.</p>	<ul style="list-style-type: none"> • Net Usable Web Visits 5.1m. • Sessions (Visits) 2m. • Visitors (Users) 1.5m. • Time on Site 02.08m. • Bounce Rate 42%. • Partner Referrals 590k.
Productivity	<p>Drive personalisation across digital channels in line with VJ's pillars to deliver optimal targeted UX on the website and in email comms. Extend the season highlighting targeted product and offers, tapping into interests and motivations to travel, to drive out of season return visits.</p>	<ul style="list-style-type: none"> • Open Rate UK 29% / FR 25% / DE 33%. • Click Through Rate UK 3% / FR 6% / DE 10%. • Unsubscribe Rate UK 0.26% / FR 0.35% / DE 0.43%.
Awareness	<p>Focus around UGC and content partnerships, deploying a thematic approach, to encourage advocacy. Suggested structure: inspirational ideas, itineraries, keep dreaming, ambassadors, industry amplification, fact-based reporting.</p>	<ul style="list-style-type: none"> • Facebook Followers 110k. • Facebook Engagement 5%. • Instagram Followers 33k. • Instagram Engagement 9%.
Productivity	<p>Integrate chat bot functionality as a marketing tool for visitors throughout the conversion funnel and when on island.</p>	<ul style="list-style-type: none"> • Visitor satisfaction with information services maintained or increased against last year's benchmark.

ACCESS		
Objective	Activity	Measurement
Effectiveness	Work with access partners to drive volume and sure up capacity to Jersey during the shoulder seasons (Mar – May and Sept – Oct).	<ul style="list-style-type: none"> • Deliver improved destination appeal by achieving a minimum of 25 UK access/trade partner campaigns. • Achieve MIK or matched investment to the value of £550k
Productivity	Continue our partner marketing strategy to drive reach and efficiencies to attract new visitors to Jersey.	<ul style="list-style-type: none"> • Successfully deliver an approved business plan to Government that confirms partnership support funding beyond 2023, replacing the Short Breaks and Route Development Grant.
Effectiveness	Develop a data driven promotional framework with top tier commercial partners to deliver co-funded marketing campaigns and matched investment and/or marketing in kind.	<ul style="list-style-type: none"> • 25 (+2 EU) partnership campaigns with each campaign having supporting data and success metrics to support rationale.
Awareness	Identify new market and route opportunities to promote.	<ul style="list-style-type: none"> • Deliver improved destination appeal by achieving a minimum of 2 EU/emerging partner campaigns. • Achieve strong passenger demand for the new direct service from Europe. Contribute towards delivery of 15,912* passengers to retain route retention. • Successfully launch 2 partnership campaigns targeting European and emerging markets. • Secure Govt/PoJ campaign approval to deliver easyJet's second direct service from Europe in 2024. <p>*Agreed commercial PoJ/easyJet target.</p>

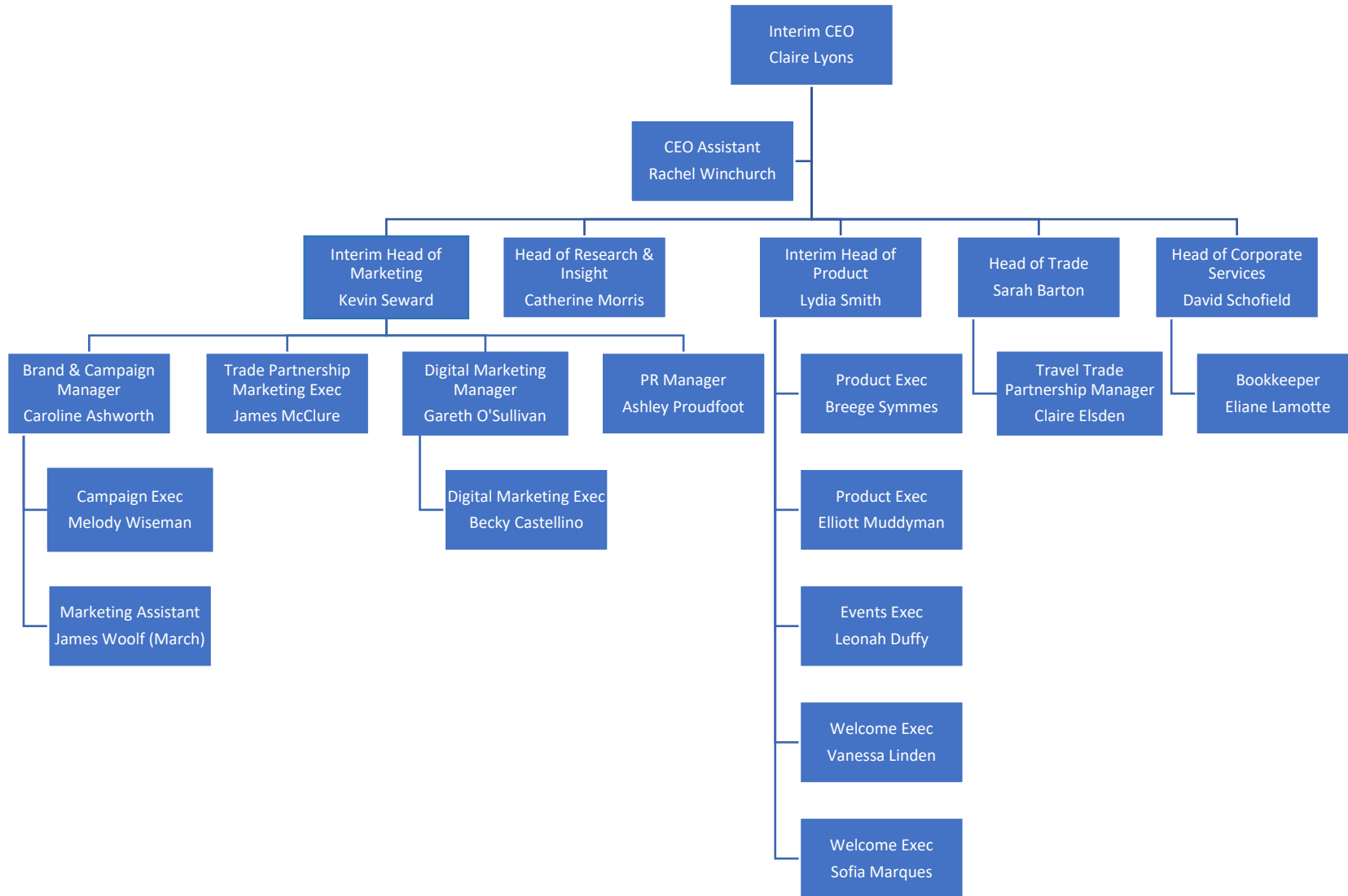
TRADE		
Objective	Activity	Measurement
Effectiveness	Identify strategic partnerships to enhance Visit Jersey brand reach. Build destination recognition and extend Jersey's distribution to our best prospect audience, driving visitors to the island and year-round travel.	<ul style="list-style-type: none"> • 250 partnership meetings to identify new business opportunities. • Initiating and progressing the inclusion of 20 new programme, product or experiences. • In collaboration with access deliver 25 partnership campaigns with MIK or matched investment 550k.
Awareness	In core European markets build destination awareness, inspire travel and drive conversion through travel industry partners. Maximising visitor volume to encourage route sustainability and growth from key access hubs.	<ul style="list-style-type: none"> • In EU and emerging markets identify and deliver 2 partnership campaigns to drive destination awareness, engagement and sales.
Effectiveness	Leverage dedicated resource to identify new programme development and emerging market opportunities. Build partner relationships, to grow distribution, support route connectivity and sustainability.	<ul style="list-style-type: none"> • Feeding into 250 travel industry partnership meetings to identify new business opportunities. • Development of partnership matrix to ensure trade support for new routes and markets to feed into the access business plan.
Awareness	Drive brand advocacy within the travel industry engaging partners with the use of inspirational and educational destination tools to empower them to become our brand ambassadors.	<ul style="list-style-type: none"> • Develop inspirational training to engage and educate over 1,100 industry professionals in the UK and Europe. • Develop and deliver engagement events and fam trips with visitor satisfaction surveys to track outcomes. • 15 proactive travel media articles in the UK, Germany and France.

Objective	Activity	Measurement
Awareness	Strengthen Jersey's position in the Irish market, inspiring travel through consumer and travel industry engagement to ensure route sustainability and growth of visitor volume from Dublin.	<ul style="list-style-type: none"> • Drive engagement through in market trade support activations in conjunction with Blue Islands.
PRODUCT & EVENTS		
Productivity	Stretch the season with more reasons to visit year-round through inspirational itineraries showcasing key product verticals e.g., arts and culture, history and heritage, local food and the great outdoors. Implement VJ's 'always on' monthly content calendar, inviting industry to share stories and relevant experiences to amplify across channels.	<ul style="list-style-type: none"> • Trade & Marketing opportunities to Industry 700. • New product experiences 20. • Industry meetings 260.
Customer Experience	Feed into the GoJ Events Strategy to build Jersey's event portfolio, to support home-grown and attract off-island events.	<ul style="list-style-type: none"> • New events / events supported 9.
Efficiency	Relaunch the partnership programme to drive revenues for VJ. Offer varied and accessible partner marketing with minimal administration.	<ul style="list-style-type: none"> • Trade & Marketing opportunities to Industry 700. • Generate revenue of £35k and MIK value of £49k.
Sustainability	Work with industry to develop and promote Jersey as a sustainable travel destination respecting economic, social, environmental goals.	<ul style="list-style-type: none"> • New product experiences 20.
Customer Experience	Work with industry to evolve Jersey's accessible product, sites and services to establish the island as an easy and inclusive destination for all.	<ul style="list-style-type: none"> • New product experiences 20.
Efficiency	Work collaboratively with other ALO's, the JHA and GoJ to develop and improve Jersey's tourism product to meet customer needs.	<ul style="list-style-type: none"> • New product experiences 20.

VISITOR INFORMATION SERVICES		
Objective	Activity	Measurement
Customer Experience	Drive extended servicing model. Introduce a chat bot and live chat to improve and streamline service levels and drive referrals.	<ul style="list-style-type: none"> Visitor satisfaction with information services maintained or increased against last year's benchmark.
Customer Experience	Explore a Digital that Delivers programme, working across ALOs. Promote how to use digital to grow revenues and lower costs.	<ul style="list-style-type: none"> Visitor satisfaction with information services maintained or increased against last year's benchmark.
Customer Experience	Relaunch Staff Pass with accredited training scheme encouraging tourism employees to become destination experts, cross-selling.	<ul style="list-style-type: none"> Maintain or increase against 2022's benchmark (results due in Q4).
Customer Experience	Research the opportunity for micro visitor centres with the aim to establish a dedicated outreach programme of promotional assets.	<ul style="list-style-type: none"> Visitor satisfaction with information services maintained or increased against last year's benchmark.
Customer Experience	Drive local advocacy. Inspire locals to promote attractions and events in Jersey in areas of high footfall.	<ul style="list-style-type: none"> Visitor satisfaction with information services maintained or increased against last year's benchmark.
RESEARCH & INSIGHTS		
Effectiveness	Calculate base levels of visitor volumes across core segments during 2022 from which growth targets can be set for future years and continuously monitored through the Exit Survey	Exit Survey* segmentation question.
Efficiency	Drive efficiencies with the Exit Survey.	<ul style="list-style-type: none"> Improve the ease of self-completion of surveys, drive more online completion to reduce reliance on in-person interviewer resource, whilst still achieving robust and representative samples.

Objective	Activity	Measurement
Effectiveness	Campaign analysis and consumer segmentation.	<ul style="list-style-type: none"> • Ongoing campaign evaluation research to be undertaken with learnings feeding into future marketing activity.
Awareness	Market analysis for country development.	<ul style="list-style-type: none"> • Research to understand the opportunity in new and growth markets.

Jan 2023 Staff Structure Chart



2023 Budget vs 2022 Budget

	<u>2023 Budget</u>	<u>2022 Budget</u>	<u>% VAR</u>
Marketing	2,897,419	2,800,000	3%
Product	150,000	250,000	-40%
Trade	481,440	550,000	-12%
Access	1,100,000	1,150,000	-4%
Research & Insight	297,551	306,000	-3%
VIS	170,010	170,000	0%
Leadership, Strategy, Admin	689,816	544,507	27%
Office Costs	<u>275,800</u>	<u>274,152</u>	1%
TOTAL	6,062,036	6,044,659	

2023 Marketing Plan												
ACTIVITY	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
MARKETING												
Spring Summer Campaign												
Autumn Campaign												
French Campaign												
Spring Summer Campaign												
ACCESS & PARTNERSHIPS												
Jet2												
easyJet												
British Airways												
Blue Islands												
Condor												
Route Development & Charter												
Tactical Marketing												
TRADE												
UK Trade Partnership Marketing												
German Trade Partnership Marketing												
Trade Events & Exhibitions												
PRODUCT & EVENTS												
Experience Development												
Events Jersey												
Destination Jersey												
Business Website												
RESEARCH & INSIGHT												
Exit Survey												
Destination Plan Launch												
Input into Gov Tourism Strategy												
ALWAYS ON												
Content Calendar												
Website												
Facebook												
Twitter												
Instagram												
SEO												
Digital Partner Remarketing												
Website Referrals												
PR												
Visitor Information Centre												
Consumer emails												
Trade emails												
What's On Guide												

APPENDIX The Visit Jersey Strategy

Our Business

Jersey's 2030 Destination Plan (JDP) set out an ambition for 1 million visitors; £500 million visitor spend per annum; and an industry whose contribution to the island community was recognised beyond its fiscal impact. The catastrophic effect of Covid since 2020 and subsequent economic and pan-regional challenges including price inflation, the war in Ukraine and significant travel and transport disruption, requires us to reset some of the forecasts, but our ambitions remain and are just as determined, in particular the recognition of the importance of the visitor economy for the quality of life for all in Jersey. Whilst in the short-term there are challenges to overcome, longer term there are immense opportunities to be realised.

Our Purpose

On 14 July 2022, a new Partnership Agreement (PA) was agreed between Visit Jersey Limited and the Government of Jersey, which is expected to remain in place until December 2023. Visit Jersey's role is to act as a catalyst to develop and deliver certain aims and objectives of the Government Plan 2022-2025 and the Common Strategic Policy 2018-2022, with the key purpose of **promoting tourism to and within Jersey**.

Our Mission and Vision

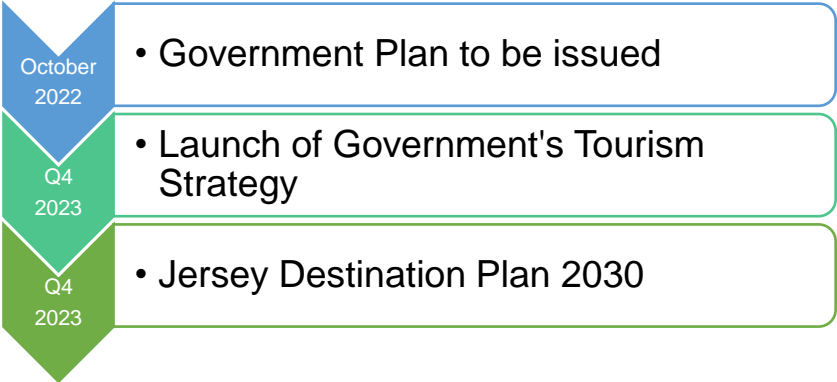
Promote tourism to and within Jersey in an innovative, cost effective and efficient way, delivering on our vision of a vibrant and sustainable leisure tourism industry whose contribution to the island is recognised beyond the purely economic benefits to the hospitality sector.

Our Goals

- The promotion of tourism to and within Jersey.
- Inspiring visitors from overseas to visit and explore Jersey.
- Maximising public investment through partnership engagement with third parties such as access providers and the travel trade.
- Advising Government and the industry on tourism issues, particularly those affecting competitiveness.
- Continuing to improve productivity of tourism assets by broadening seasonality.

Our Roadmap to a New Destination Plan

To achieve our ambitions, Visit Jersey will launch a refreshed Jersey Destination Plan in due course. To ensure that Visit Jersey is aligned with Government policy and stakeholder roadmaps as well as ministerial objectives, it will be critical to ensure projects and plans are developed in the right sequence. As such, the following roadmap is envisaged to deliver the JDP.



Aligning to Ministerial Objectives

Our activity planner for 2023 is very much aligned to our Minister’s Objectives for Jersey for 2023. We have outlined our core activity areas and KPIs in the coming pages to demonstrate this alignment and synchronicity to the overarching objectives for Jersey as a prosperous and sustainable economy. The common theme is that tourism is everyone’s business, and we can influence various touchpoints, policies and developments to ensure that the local and visitor economy is represented, impactful and a key contributor to future economic prosperity.

Ministerial Objective	How Visit Jersey aligns and supports
<p>Creating new opportunities for growth in the daytime, evening, visitor and events-led economies through clearly articulated sector strategies which will encourage investment and influence placemaking to create an attractive and dynamic retail and tourism sector.</p>	<p>Visit Jersey works collectively with industry and key partners to promote Jersey to visitors and locals alike, working from evidence-based research to drive growth across the visitor economy. This ranges from partnership campaigns with access, trade and local partners, to delivering multi-channel communications strategies to our key audiences to showcase the Jersey product.</p>
<p>Working with stakeholders to ensure that Government interactions are simple and efficient for new and existing businesses, entrepreneurs and social enterprises.</p>	<p>Visit Jersey will continue to work closely with the Minister and key partners such as the JHA and industry partners to identify and advise on solutions to existing barriers to business, including the reviewing of the Tourism (Jersey) Law 1948 and the Licensing (Jersey) Law 1974 so they are fit for purpose and will enable businesses to operate efficiently within the sector. The newly established Tourism Steering Group also provides a platform to advise and support government with other key barriers such as migration, infrastructure, bed stock, French ID cards and staffing.</p>

Ministerial Objective	How Visit Jersey aligns and supports
Identifying new international opportunities for Jersey businesses and work to deepen our Island's economic ties to our closest neighbours.	We will work with the Minister where necessary in terms of export and inward investment strategies and to ensure greater cooperation across all areas of economic activity including air and sea connectivity, digital, sport, culture and heritage. Our French tourism strategy will also support the deepening of our cultural and economic links with France in parallel to the Minister's political engagements. We will also explore the opportunities in emerging markets in Europe such as Ireland and Holland with new route connectivity.
Working with our key partners to ensure our Island maintains robust transport and digital connectivity, improving resilience and expanding choice for consumers.	We have excellent working relationships with key access partners at Ports of Jersey and will continue to work together to enhance our routes and connectivity to meet visitor demand and keep us competitive with other destinations. Tourism underpins the viability of numerous routes by air and sea for the benefit of residents and visitors alike. Note that over 65% of passengers coming through Ports during 2019 were visitors.
'Recognising the importance of our marine and agriculture sectors,'	Visit Jersey maximises exposure to Jersey's wonderful natural environment and rich local produce in its social media messaging, website content, itineraries and visitor communications to demonstrate the rich and diverse offering in Jersey. We also work with partners to champion and protect these areas to sensitively promote these areas as visitor experiences and another reason to visit (Jersey Aspiring Geopark, Jersey National Park, Genuine Jersey, Blue Marines).
Recognising the part sport can play in improving lives and strengthening communities, we will deliver a coordinated and enhanced sport offering for Islanders. We will embrace the power of sport to enrich our local economy and promote Jersey internationally.	Visit Jersey has previously inputted into research being undertaken by 4Global on the social and economic impact of sporting events and activity in Jersey. This has included both participation events such as SLT, Swimrun, the Jersey Marathon etc as well as grassroots sports development. VJ shared the research findings from the sports survey undertaken with sports clubs, groups and education stakeholders. We are committed to supporting any plans for an elite sport strategy that could encourage more visitors, enhance the visitor economy and benefit Islanders.
Arts and Heritage Strategies.	Arts and Culture are a key motivator in terms of reasons to visit and is embedded in our promotional activity, and we will continue to look at ways to showcase the rich arts and culture offering to increase appeal of Jersey as a destination and reason to visit.

Ministerial Objective	How Visit Jersey aligns and supports
‘.. fostering an economy that is skills-led, with a digitally empowered workforce’	We will look at ways to work with our key partners to support them in promoting the many career opportunities available in the industry to Islanders. We will also be exploring a ‘Digital that Delivers’ programme to allow industry to better promote and convert their offering to digital.
Deploying the £20m Technology Accelerator Fund, from Q2 2023, to drive prudent and targeted digital solutions to wider Island challenges and we will promote a responsible, internationally competitive and innovative digital and technology sector.	We will also review the criteria for the Technology Accelerator Fund once finalised, with a view to submitting a proposal to enhance and transform the visitor economy to digital first solutions and to improve the customer experience through tech development to meet the changing needs and behaviours of global travellers.

Aligning to Government of Jersey's Performance Framework

Of key importance is Visit Jersey's role in contributing to and supporting Government on Economic Recovery and Renewal through the seven strategic priorities and in particular, economy and skills, to develop a more sustainable, innovative, outward-facing and prosperous economy, with Jersey being an attractive place for everyone to realise their potential.

Environment	Community	Economy
Key partner collaboration and industry support on greener Jersey eco-tourism aligned to Carbon Neutral Roadmap and transition to lower carbon lifestyles and travel.	Develop itinerates and inspiration for the local community for wellbeing and island identity to support the international narrative and perception of Jersey.	Work with partners to ensure that we can protect and attract quality staff to our industry to help ensure a strong and sustainable economy with rewarding opportunities.
Promotional campaigns, content and itineraries to meet the needs of those visitors looking for more sustainable destinations.	Contribute to a vibrant and inclusive community for Islanders to enjoy through the promotion of a diverse range of quality leisure and entertainment opportunities.	Working alongside key partners through content and itineraries to further positively impact visitor spend and the industry's contribution to GVA and productivity. Visitors spent £280m in Jersey in 2019.
Broaden and deepen relationships with and promotion of heritage, National Trust and eco marine to local and overseas visitors.	Promote mental health and wellbeing of the Jersey offering to locals for improved quality of life in Jersey.	Provide training programmes and accreditation to increase knowledge of industry workers to enable them to enhance the visitor experience.
Form an integral part of Jersey's sustainability strategy in terms of industry's adaptability to the strategy due to the increased focus from access and travel partners and visitors demanding this evolution.	Assist partners in the promotion of education, sports and culture initiatives.	Tourism provides all-important diversity to our economy. In real terms, using constant 2021 values, in the 10-year period to the end of 2019, the total GVA of the sector of the economy increased by 35%, second only to 'Other Business Activities'.

Customer Segments

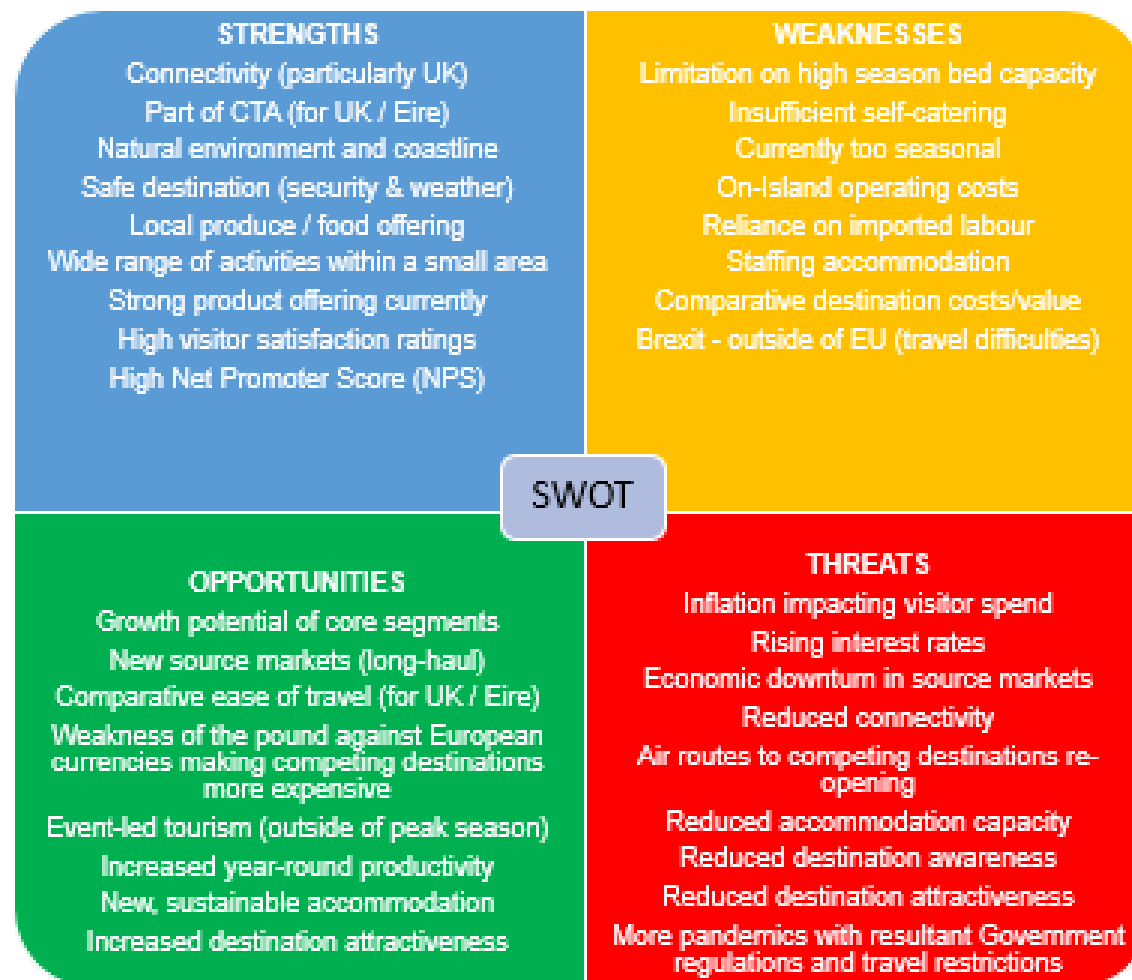
Jersey's Best Prospects: 25 million

Visit [Jersey Segmentation](#) | Strategy and introduction to segments

Quick reference guides

Customer segments											Appeal						
Market	% of market	% appeal of Jersey	Size of market (UK)	Size of market (FR)	Size of market (DE)	Appeal of Jersey (UK)	Appeal of Jersey (FR)	Appeal of Jersey (DE)	Mean age	Travel season	Length of stay	Very appealing/ appealing	Product Associations	Type of accommodation	Have never visited Jersey	Interaction	Motivation
Market	All	All	40.3m	5.8m	7.5m				All	All	Short (1-3 nights) Medium (4-6 nights) Long (7+ nights)	All	All		All	All	All
Authentic Adventurers	13%	52%	4.4m	1m	1m	58%	54%	36%	46	Spring 58% Summer 72% Autumn 39%	Short 25% Medium 58% Long 16%	Very appealing 30% Appealing 55%	Walking, cycling, exploring History & heritage Connecting with nature	Unique Quirky self-catering	75%	Exploring	<ul style="list-style-type: none"> More adventurous cultural segment Authentic destination Want to go off the beaten track History, heritage and wildlife
Culture Chasers	11%	53%	4m	0.8m	0.9m	52%	58%	47%	53	Spring 59% Summer 63% Autumn 39%	Short 28% Medium 59% Long 14%	Very appealing 33% Appealing 50%	Walking, cycling, exploring History & heritage Connecting with nature Food & drink	Luxury	70%	Exploring Social	<ul style="list-style-type: none"> History, heritage, culture, performing arts Broaden mind Not adventurous Don't want to get off beaten track
Easy Explorers	10%	56%	3.6m	0.4m	1.1m	53%	72%	54%	56	Spring 66% Summer 58% Autumn 47%	Short 16% Medium 62% Long 22%	Very appealing 35% Appealing 47%	Walking, cycling, exploring History & heritage Connecting with nature Beach		75%	Exploring Leisure social	<ul style="list-style-type: none"> Physically active through gentle activities Great outdoors History, heritage and nature Off beaten track
Moment Makers Aspirational segment	14%	41%	6m	0.8m	1m	43%	40%	34%	36	Spring 36% Summer 79% Autumn 22%	Short 33% Medium 53% Long 14%	Very appealing 24% Appealing 51%	Beach Food & drink	Luxury	82%	Indulge	<ul style="list-style-type: none"> Inspire and man-made entertainment Feel special or spoil Trade moments Luxurious surroundings Gourmet food

All segments share a preference for: Mid-range hotel, Guest house/B&B, Self-catering, Airbnb



Political

- New Government's Plan will have an impact on Visit Jersey's Business and Destination Plans.
- Potential political instability in our source markets.
- European Id Cards/ Passports.
- Tourism Strategy delivery.

Economic

- Future Economy Plan - establish value and role of tourism.
- Cost of living crisis - potential for significant impact on demand for travel and on industry.

Social/
Cultural

- Social behaviours / unrest with geo-political impact on nations.
- Diversity & Inclusivity.

Tech

- IT - Cyber threat.

Legal

- Employment law must be complied with in Jersey and the UK.
- Tourism *Jersey) law 1948, Licensing (Jersey) Law 1974, Shipping Law 2002.

Environ
ment

- .Net zero plan delivery.

Future Travel Trends

Sustainability

Sustainability is a vital consideration for all businesses, not only the travel and tourism industry, and will continue to shape consumer demands and expectations and business operations. The World Travel & Tourism Council note that while sustainability has been a priority for the travel and tourism sector for some time, it became even more prominent through the pandemic. Recent research undertaken by Expedia in 2022 showed that 90% of consumers look for sustainable options when travelling and nearly 70% of consumers are willing to sacrifice some element of convenience in order to travel more sustainably.

Businesses are facing growing scrutiny for both their environmental track record and their support for diversity and inclusion (covered below). However, they must be careful not to 'greenwash' and mislead consumers about their environmental credentials, but instead make authentic commitments to sustainability and take accountable action to fulfil these. There's an opportunity for the tourism industry to implement meaningful changes to operations and take full account of current and future economic, social and environmental impacts of their operations, addressing the needs of visitors, the industry, the environment and local residents. Travellers want to see more sustainability information from destinations, tourism boards and travel companies. This provides an opportunity for travel brands and destinations to make sustainable travel information easier to understand and access and to show the value and impact of responsible travel choices.

Inclusivity, Diversity and Accessibility

Recent research undertaken in 2022 revealed that 7 in 10 consumers would choose a destination, accommodation, or transportation option that's more inclusive to all types of travellers, even if it's more expensive. 78% said they had made a travel choice based on promotions or adverts that they felt represented them through messaging or visuals, and for millennials that figure was even higher at 84% who'd made a travel choice based on representation in travel advertising.³ There's a gap in accessible and inclusive options in the travel marketplace, and there's an opportunity for the tourism industry to improve both their offerings and their marketing to make travel more accessible and ensure inclusivity for all races, genders, ages, sexualities and disabilities.

Digital / Technology

The use of digital technology within the tourism industry was even further accelerated as a result of the Covid-19 pandemic, as consumers became more comfortable and savvy with technology such as QR codes, contactless check-in processes and payments. As new digital trends emerge and new technology becomes established, customers start to expect a certain level of experience with the associated convenience. There's an opportunity for Jersey to develop forward-thinking initiatives to improve the visitor experience through technology such as AI powered chatbots to

facilitate easier access to visitor information; utilising the Internet of Things technology to create highly personalised services and also help reduce the industry's environmental footprint; more online booking systems for product providers to make their services more accessible online; and implementation of mobile-first technology as mobile devices (excluding tablets) generated 59% of global website traffic in Q2 2022 and mobile ownership and internet usage are forecast to continue growing in the future, as mobile technologies become more affordable and available than ever.

