Visit Jersey Stakeholder Meeting

The Grand Hotel | 11 December 2018
• Current trends & outlook for 2019
• Jersey Destination Plan
• Visit Jersey 2019 Plan
• Product-Trade-Marketing
• Q&A
Current trends & outlook for 2019

David Edwards | Head of Research & Evaluation
Expectations for full-year 2018

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

<table>
<thead>
<tr>
<th>Location</th>
<th>Arrivals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Edinburgh</td>
<td>6,144</td>
</tr>
<tr>
<td>Birmingham</td>
<td>3,700</td>
</tr>
<tr>
<td>Visiting Yachtemen</td>
<td>3,627</td>
</tr>
<tr>
<td>Guernsey Sea</td>
<td>2,763</td>
</tr>
<tr>
<td>London Gatwick</td>
<td>2,567</td>
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<table>
<thead>
<tr>
<th>Location</th>
<th>Arrivals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Guernsey Air</td>
<td>1,518</td>
</tr>
<tr>
<td>St Malo</td>
<td>2,181</td>
</tr>
<tr>
<td>Carteret</td>
<td>3,385</td>
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<tr>
<td>Sark</td>
<td>3,538</td>
</tr>
<tr>
<td>Poole</td>
<td>3,821</td>
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</table>
Were our 2018 assumptions right?

**Connectivity**
- +37% more seats from Germany
- Seasonal inter-island ferry service
- Enhanced inter-island flight choice

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

**Economics**
- Sterling remains weak
- No sudden economic downturn

**Policy**
- Nothing that will adversely impact tourism businesses or visitors experience of Jersey
Looking ahead to 2019

“Predicting the future is easy… getting it right is the hard part”
Factors that will play a role in the future

What about the ‘B’ word?
Some assumptions for 2019

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

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

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

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

**Social**
- People will, more than ever, place value on their holidays, and seek out holidays that offer good value
Jersey Destination Plan
Jersey Destination Plan
Priorities

1. Markets
   Grow a portfolio of markets

2. Image
   Help the world fall in love with Jersey

3. Access
   Sustain existing connectivity and introduce new routes
   On-Island experiences to deliver excellent standards

4. Destination
   Develop a year-round visitor economy
   Promote the Channel Islands
   Help visitors explore Jersey

5. Partnerships
   Help Jersey fall in love with tourism
JDP Recommendations

1. Grow a portfolio of markets that drives current opportunities and creates long-term growth in visits and spend

2. Help the world fall in love with Jersey

3. Sustain existing connectivity and introduce new routes

4. On-island experiences deliver to excellent standards

5. Develop a year-round visitor economy

6. Promote Channel Islands *(where it makes sense)*

7. Help visitors explore Jersey

8. Help Jersey fall in love with tourism
Visitor Economy KPIs

Our vision

2030
By 2030 the world has fallen in love with Jersey
£500m
1m visitors spending £500m

2030 performance indicators

Visitor Economy GVA 9%
Visitor spend-nominal £500m
Total visitor numbers 1m
Overnight holiday visitors 600,000
Net promoter score of visitors 55
Island RevPAR £85

Seasonal spread: Share of overnight holiday visits outside April to September 28%
Product
Win hearts & change minds

Meryl Laisney | Head of Product & Events
Signature Experiences

Support Events

Reasons to visit: thematic & niche

Accessibility (FIT, Group, MICE)

Productivity & Competitiveness

Distribution on & off-island

How to be agile

Partnership programme
## Signature Experiences

<table>
<thead>
<tr>
<th>Product Theme</th>
<th>Experience Pillars</th>
<th>Brand Promise</th>
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<tbody>
<tr>
<td>Nature &amp; Wilderness</td>
<td>Rewild Yourself</td>
<td>Reconnect with nature</td>
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<tr>
<td></td>
<td>Tidal Trail</td>
<td></td>
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<tr>
<td>Active &amp; Wellbeing</td>
<td>Extreme Jersey</td>
<td>Come up for air</td>
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<tr>
<td></td>
<td>Jersey on the Rocks</td>
<td></td>
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<tr>
<td>People &amp; Culture</td>
<td>From Field to Fork</td>
<td>Optimism, individualism, togetherness</td>
</tr>
<tr>
<td></td>
<td>Art Tour of Urban Jersey</td>
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<tr>
<td>History &amp; Heritage</td>
<td>Around the Island War Tour</td>
<td>Pride &amp; passion</td>
</tr>
<tr>
<td></td>
<td>Jersey Peace Trail</td>
<td></td>
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<td></td>
<td>V75 (2020)</td>
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On & Off Island

- Advise on strategic direction and priorities
- Co-ordinate an annual events calendar for Jersey
- Promote event organisation best practice
- Share insights & research into the events industry
- Curate MICE inspirational itineraries
- Facilitate funder & organiser introductions
Events Jersey
Incubator Marketing Programme

Criteria & eligibility

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

• Build a balanced portfolio of trade partnerships engaged in telling Jersey’s story

• Deliver year round accessibility and sustainable growth in visitor volume and spend
Trade Strategy

Work with our industry partners to distribute and extend reach of our tourism product
Trade: build a balanced market portfolio

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

- Maximise current flight capacity and ensure route sustainability
- Grow the seasonality of current routes
- Drive greater destination awareness and new visitor volume through partnership optimisation
- Identify and develop qualified new route opportunities
Trade: optimise partnerships & identify gaps

Maximise Jersey’s Distribution …

1. Approach best match partners in the UK & Europe
2. Nurture existing partnerships to capture new sources of visitors to extend season and spent
3. Identify key trade to collaborate with to extend brand and reach
Trade: bring Jersey to life

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

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

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

Identify and attend key trade events and develop bespoke events

Develop bespoke buyer and sales influencer educational programmes
Marketing
#theislandbreak

Louise Ashworth I Head of Marketing
Summer is Here

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

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

Campaign themes
Natural harmony is here
Find yourself here
Culture is here
Come together here

Assets and opportunities
Video edits, imagery, campaign offers, campaign toolkit
As a small island famous for its food, Jersey’s bursting with flavour from abundant local produce and rich creamy milk to seafood straight from the island’s clear waters.

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

Just bring a healthy appetite.

**Campaign themes**

- Feed your appetite
- Burst into life this spring
- See the island in full colour

**Assets and opportunities**

- Campaign video
- Imagery
- Campaign offers
- Campaign toolkit
Winter 2019

Explorers Wanted!

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

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

Explorer types

The weekend wanderer
The active adventurer

The soul seeker
The romantic rambler

Assets and opportunities

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