



CHANGING PERCEPTIONS, SHAPING THE FUTURE A STRATEGY FOR THE VISITOR ECONOMY – DELIVERY PLAN

Our Vision:

To be a globally recognised, sustainable
and enriching destination that Islanders
are proud to share

Delivery plan for the Visitor Economy Strategy : Changing Perceptions, Shaping the Future

INTRODUCTION

The Visitor Economy Strategy was published in December 2023 and, as part of this, it was agreed that a delivery plan would be developed in 2024, in line with the Strategic Objectives and Policy Priorities identified therein.

The visitor economy steering group has met to discuss the actions and deliverables resulting from the strategy and will continue to monitor and report on progress against these actions. They are divided into:

- Short term – 2024
- Medium term – 2025-26

ACTION PLAN

1. **Connectivity** - We will support the ambition to protect and grow the existing route network and high-value air connectivity (in particular into Europe) through development of awareness of Jersey as a destination and development of the on-island offering.

Summary	Policy Priorities	Responsible	Due date
1. Passenger forecast and route development strategy	1.2 Engaging closely with connectivity strategy to ensure new route growth and destination marketing to potential visitor demand are aligned	Ports of Jersey	Q1 2024
2. Connectivity and bedstock analysis – target capacity	1.1 Continuing to articulate our ambition and widening the understanding of how connectivity and accommodation capacity are interconnected	Ports of Jersey, GoJ Economic Analysis Unit	Q4 2024
3. Conduct Evaluation of economic impact of connectivity and present case for establishment of a Route Development Fund	1.3 Ensuring the objectives of Ports of Jersey and Visit Jersey are aligned and that responsibility for route marketing is clear and appropriately funded	Ports of Jersey	Q3 2024

2. **Unlock investment in accommodation** - We will unlock investment in critical infrastructure, in particular accommodation, to ensure its long-term viability and ensure the capacity exists to grow the whole Visitor Economy and support the growth of connectivity.

Summary	Policy Priorities	Responsible	Due date
4. Conduct market testing for potential accommodation development - La Folie site	2.7 Unlocking development on Government-controlled sites	Ports of Jersey	Q2 2024
5. Addition of floating visitor accommodation in St Helier marina	2.7 Unlocking development on Government-controlled sites	Ports of Jersey	Q3 2024
6. Conduct hotel investment market research and identify policy levers to be explored	2.8 Re-establishing a mechanism to support investment in the sector	Government – Economy	Q4 2024
7. Identification of sites for new visitor accommodation	2.7 Unlocking development on Government-controlled sites	Government – Economy	Q4 2024
8. Develop a playbook for Inward Investment in Accommodation to articulate the opportunity and market available sites, including policy levers identified above where relevant	2.10 Increase investor interest and owner confidence by articulating and marketing the opportunity for growth	Government - Economy	Medium Term
9. Develop clear cross-government policy around short-term holiday lets (eg Airbnb) and communicate with landlords	2.9 Developing clear policy to allow growth in the short-term holiday let and self-catering market	Government – Economy, SPPP, I&E Regulation	Q3 2024

See also section 7 relating to regulation.

3. **Unlock investment in product** - We will enable the development and renewal of diverse and unique products and experiences that benefits visitors and Islanders and allows all to experience Jersey's cultural and natural assets in a way that works for them.

Summary	Policy Priorities	Responsible	Due date
10. Work with Visit Jersey to make improvements to the Airport & Harbours arrival experience	3.11 Improving the customer arrival experience and welcome and identifying a mechanism for continuous feedback	Ports of Jersey	Q2 2024
11. Open a pop-up Visitor Information Centre at the Jersey Museum	3.12 Improving the customer information and booking journey to provide a seamless experience	Visit Jersey	Q2 2024
12. Develop a more permanent solution for Visitor Information Services	3.12 Improving the customer information and booking journey to provide a seamless experience	Visit Jersey	Medium Term
13. Scope and begin to deliver a product innovation campaign for industry	3.14 Fostering collaboration in the industry to develop unique experiences 8.45 Encouraging industry to work together and package up unique products and experiences to be marketed to relevant audiences	JHA	Medium Term
14. Formation of an events working group to oversee the creation of a strategy, events calendar and facilitate the organisation of public events in Jersey	4.26 Provide amenities and events that bring local community and visitors together for the benefit of all; 7.42 Developing an events strategy and appropriate legislation	Government – Economy	Q4 2024

Summary	Policy Priorities	Responsible	Due date
15. Deliver animation and physical improvements to the High street and Central markets as part of the ongoing regeneration and public realm improvements	<p>3.18 Addressing investment in the public realm, in particular St Helier, to ensure this enhances Jersey's attractiveness;</p> <p>4.26 Provide amenities and events that bring local community and visitors together for the benefit of all</p>	Government	Q4 2024
16. Opera House & Elisabeth Castle Capital projects	3.17 Ensuring on-island infrastructure is consistent with a high-quality visitor offering	Government – Economy	Medium Term

4. **Sustainability** - We will ensure that the growth of tourism and hospitality is sustainable in respect to our economy, our environment and our community. We will showcase and protect our natural environment by putting responsible tourism at the heart of all our policies and aligning with the Island's Carbon Neutral Roadmap.

Summary	Policy Priorities	Responsible	Due date
17. Conduct Sector Productivity review to identify opportunities for improving productivity in the sector	4.19 Continued focus on productivity improvement making businesses more resilient and financially sustainable	Government – Economy	Q3 2024
18. Form a working group to include Ports of Jersey, Visit Jersey and government officers to agree scope of work for sustainability for the visitor economy	<p>4.22 Increase monitoring and reporting to better understand impact and carbon emissions;</p> <p>4.23 Adopting greater accreditation so consumers have greater knowledge of the product they are purchasing</p>	Government – Economy	Q4 2024

5. **Build Brand awareness** - We will promote the Island internationally and contribute to its reputation through a clear brand and destination positioning.

Summary	Policy Priorities	Responsible	Due date
19. Appoint a new creative agency and start work on new brand campaign	5.30 Embedding the Island Identity work in our brand development	Visit Jersey	Q2 2024
20. Activate a Local Ambassador programme to engage islanders	5.31 Building community support for the sector and using locals as ambassadors for and of Jersey's Visitor Economy	Visit Jersey	Medium Term

6. **Digitalisation and people** - We will unlock the potential of digital skills and solutions to improve the customer experience, drive business productivity and harness the potential of data.

Summary	Objective/Policy Priorities met	Responsible	Due date
21. Scope and launch RFP for Industry Data Hub	6.32 Developing a data hub for industry which gives businesses and key stakeholders access to better data for decision making.	Visit Jersey	Q3 2024
22. Scope a digital booking tool for activities and events on island	6.33 Encouraging adoption of digital booking solutions and collaboration on a single platform to improve the customer experience; 3.12 Improving the customer information and booking journey to provide a seamless experience	Visit Jersey	Q4 2024
23. Attend careers fairs and conduct industry promotion activity in schools	4.25 Ensure the industry continues to provide an attractive and flexible option to work or start a business across all sectors of the community	JHA	Q4 2024
24. Produce sector specific packages of support, guidance and	6.34 Accelerating the adoption of technology in the industry, to drive	Jersey Business & Digital Jersey	Q4 2024

Summary	Objective/Policy Priorities met	Responsible	Due date
training to enable businesses to assess and prioritise the digital tools needed for their businesses	productivity and free up staff time to concentrate on value-adding customer interactions.		
25. Identify key gaps in digital adoptions and provide training and/or advice to industry groups	6.34 Accelerating the adoption of technology in the industry, to drive productivity and free up staff time to concentrate on value-adding customer interactions.	Jersey Business & Digital Jersey	Q4 2024
26. Deliver annual technology roadmap for specific sectors such as retail, construction or tourism	6.37 Identifying the future skills needs of the industry and aligning on-island training with these.	Jersey Business & Digital Jersey	Medium term

7. **Enabling regulatory framework** - We will ensure the Regulation and Governance is shaped so that it enables the industry to achieve its goals and provides a supportive business environment.

Summary	Objective/Policy Priorities met	Responsible	Due date
27. Short-term holiday lets (amendments to the General Development order)	2.9 Developing clear policy to allow growth in the short-term holiday let and self-catering market	Government – SPPP	Q1 2024
28. Tourism General Provisions Order - removal of spatial standards	7.41 Reviewing the Tourism (Jersey) Law 1948 and Licensing (Jersey) Law 1974 and amending or creating new legislation, as appropriate.	Government – Economy	Q1 2024
29. Tourism General Provisions Order – Other Amendments	7.41 Reviewing the Tourism (Jersey) Law 1948 and Licensing (Jersey) Law 1974 and amending or creating new legislation, as appropriate.	Government – Economy	Q4 2024

Summary	Objective/Policy Priorities met	Responsible	Due date
30. Licensing Law Review & Amendments	7.41 Reviewing the Tourism (Jersey) Law 1948 and Licensing (Jersey) Law 1974 and amending or creating new legislation, as appropriate.	Government – Economy	Q4 2024
31. Events Legislation development	7.42 Developing an events strategy and appropriate legislation	Government – Economy	Medium term

8. **Working together** – We will work collaboratively to ensure all stakeholders are aligned in our aim to deliver a world class experience for visitors and achieve our overarching goals.

Summary	Objective/Policy Priorities met	Responsible	Due date
32. Hold quarterly VESG meetings to coordinate and report against deliverables	8.47 Developing a partnership approach for the Visitor Economy to enable collaboration in the delivery of the strategy	Government – Economy	Q4 2024
33. Design mechanism for celebrating best practice (eg innovation, collaboration)	8.48 Celebrating and recognising best practice	JHA	Q3 2024

METRICS

In order to assess progress, in addition to the above actions the following metrics will continue to be tracked:

Core Metrics	2023	Target
Visitor Spend	£290m	Increase
Sector economic output (Hospitality GVA)	£240m (2022)	Increase
Sector Productivity (Hospitality GVA / FTE)	£46,000 (2022)	Increase
Secondary Measures		
Visitor overnights	2.3m	Increase
Passenger arrivals	527,000	Increase
Number of registered bed spaces	9,400	Increase
Net growth in registered bed spaces (3 yr CAGR)	-4%	Move to positive
Estimated bed nights available (over the year)¹	2.8m	Increase

It is our intent to develop metrics for each Goal (Growth, Visibility, Community, Environment) in order to ensure we measure progress against all of these, not just volume and economic performance. In line with our ambition to be a sustainable destination, these could include measures such as carbon emissions and energy efficiency, social impact and community benefit, citizens' wellbeing, diversity & inclusion, gender pay-gap, waste management etc, subject to data availability.

We will determine whether there are suitable indicators in the Jersey Performance Framework for which data is already being gathered and reported or whether alternative sources of measurement would be required.

¹ In registered accommodation (excludes Airbnb properties where not required to register under the Tourism law). This takes into account seasonal opening where known by multiplying the number of beds built by the estimated number of opening days.