



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	Ports of Jersey	Q1 2024
2. Connectivity and bedstock analysis – target capacity	1.1	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	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	Ports of Jersey	Q2 2024

Summary	Policy Priorities	Responsible	Due date
5. Addition of floating visitor accommodation in St Helier marina	2.7	Ports of Jersey	Q3 2024
6. Conduct hotel investment market research and identify policy levers to be explored	2.8	Government – Economy	Q4 2024
7. Identification of sites for new visitor accommodation	2.7	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	Government - Economy	Medium Term
9. Develop clear cross-government policy around short-term holiday lets (eg Airbnb) and communicate with landlords	2.9	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	Ports of Jersey	Q2 2024
11. Open a pop-up Visitor Information Centre at the Jersey Museum	3.12	Visit Jersey	Q2 2024
12. Develop a more permanent solution for Visitor Information Services	3.12	Visit Jersey	Medium Term
13. Scope and begin to deliver a product innovation campaign for industry	3.14; 8.45	JHA	Medium Term
14. Formation of an events working group to oversee the creation of a strategy, events calendar and	4.26, 7.42	Government – Economy	Q4 2024

Summary	Policy Priorities	Responsible	Due date
facilitate the organisation of public events in Jersey			
15. Deliver animation and physical improvements to the High street and Central markets as part of the ongoing regeneration and public realm improvements	3.18; 4.26	Government	Q4 2024
16. Opera House & Elisabeth Castle Capital projects	3.17	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	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	4.22, 4.23	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	Visit Jersey	Q2 2024
20. Activate a Local Ambassador programme to engage islanders	5.31	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	Visit Jersey	Q3 2024
22. Scope a digital booking tool for activities and events on island	6.33; 3.12	Visit Jersey	Q4 2024
23. Attend careers fairs and conduct industry promotion activity in schools	4.25	JHA	Q4 2024
24. Produce sector specific packages of support, guidance and training to enable businesses to assess and prioritise the digital tools needed for their businesses	6.34	Jersey Business & Digital Jersey	Q4 2024
25. Identify key gaps in digital adoptions and provide training and/or advice to industry groups	6.34	Jersey Business & Digital Jersey	Q4 2024
26. Deliver annual technology roadmap for specific sectors such as retail, construction or tourism	6.37	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	Government – SPPP	Q1 2024
28. Tourism General Provisions Order - removal of spatial standards	7.41	Government – Economy	Q1 2024
29. Tourism General Provisions Order – Other Amendments	7.41	Government – Economy	Q4 2024
30. Licensing Law Review & Amendments	7.41	Government – Economy	Q4 2024

Summary	Objective/Policy Priorities met	Responsible	Due date
31. Events Legislation development	7.42	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	Government – Economy	Q4 2024
33. Design mechanism for celebrating best practice (eg innovation, collaboration)	8.48	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

¹ In registered accommodation (excludes airbnb 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.

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.