25 November 2025

To: The Economic and International Affairs Scrutiny Panel States of Jersey

Subject: Visit Jersey Submission – Proposed Budget 2026–2029 (P.70/2025)

Dear Deputy Tadier and Panel Members,

Thank you for the opportunity to contribute to the review of the Proposed Budget 2026–2029. Visit Jersey welcomes the Panel's recognition of tourism as a core pillar of Jersey's economy, and the positive impact public investment in the visitor economy has on the island's jobs, productivity, year-round economic activity, and quality of life.

Our response addresses the specific areas outlined in your request.

1. Funding Provision

The Proposed Budget 2026–2029 does not specify a figure for budget allocation to Visit Jersey. However, based on the incremental increases allocated for the Economic Development department, we can infer that Visit Jersey's core grant will be 4.72m or less. (fig 1).

It is important to note that Visit Jersey's core grant was reduced by -4% in 2025 compared with 2024, at a time when the real-term value of the grant had already been significantly reduced due to inflation. At inception, Visit Jersey's core grant was £5m per annum; today, according to the Statistics Jersey inflation calculator, the adjusted core grant would be £7.46m. The £4.72m core grant Visit Jersey received in 2025 represents a reduction of -49% in real terms. The real term value of the grant continues to be eroded by inflationary pressures (fig 2). and increased media and production costs (fig 3).

The combined effect of the -4% cash reduction in 2025, continued inflationary erosion, and increased media and production costs means that Visit Jersey's capacity to compete effectively in key markets is now materially constrained.

Visit Jersey's marketing strategy continues to maximise efficiency and drive value through:

- co-investment with transport and travel partners,
- prioritisation of proven channels, and
- data-driven media allocation.

However, even with these measures, the current core grant limits our ability to generate the scale of demand required to fulfil the ambitions of the Visitor Economy Strategy (December 2023), including to support the growth of air and sea connectivity, increase shoulder-season travel, and drive higher productivity across the tourism sector.

Fig 1.

Summary of Visit Jersey's budget allocation since inception in 2015.

	Core Grant	Route Marketing	BBSP	Other	Total	Notes
2015	£ 2,578,982.00			£ 32,000.00	**£ 2,610,982.00**	£32K funds transferred from Jersey Tourism
2016	£ 5,000,000.00			£ 100,000.00	**£ 5,100,000.00**	Events
2017	£ 5,000,000.00			£ 100,000.00	**£ 5,100,000.00**	Events
2018	£ 4,900,000.00			£ 100,000.00	**£ 5,000,000.00**	Events
2019	£ 4,900,000.00				**£ 4,900,000.00**	
2020	£ 4,378,000.00				**£ 4,378,000.00**	
2021	£ 4,900,000.00	£ 850,000.00			**£ 5,750,000.00**	*
2022	£ 4,900,000.00	£ 850,000.00		-£ 100,000.00	**£ 5,650,000.00**	* (100K returned to GoJ due to cancelled SLT event)
2023	£ 4,900,000.00	£ 850,000.00			**£ 5,750,000.00**	*
2024	£ 4,900,000.00			£ 120,000.00	**£ 5,020,000.00**	50k Springboks, 13k Bergerac production, 57k data analysis
2025	£ 4,720,000.00		£ 2,000,000.00	£ 16,000.00	**£ 6,736,000.00**	16K sustainability project
2026	£ 4,720,000.00		£ 2,000,000.00		**£ 6,720,000.00**	

*£850,000 received from 2021-2023 was a Route Marketing Fund, to support post-Covid recovery and was ring-fenced for Ports of Jersey to ensure connectivity with key airline partners was retained.

Fig 2.

Core grant today adjusted by inflation *	£7,468,750.00
% drop since inception	49.40%

Fig 2 illustrates the amount the core grant would be if it had kept up with Jersey inflation since 2026

Fig 3.

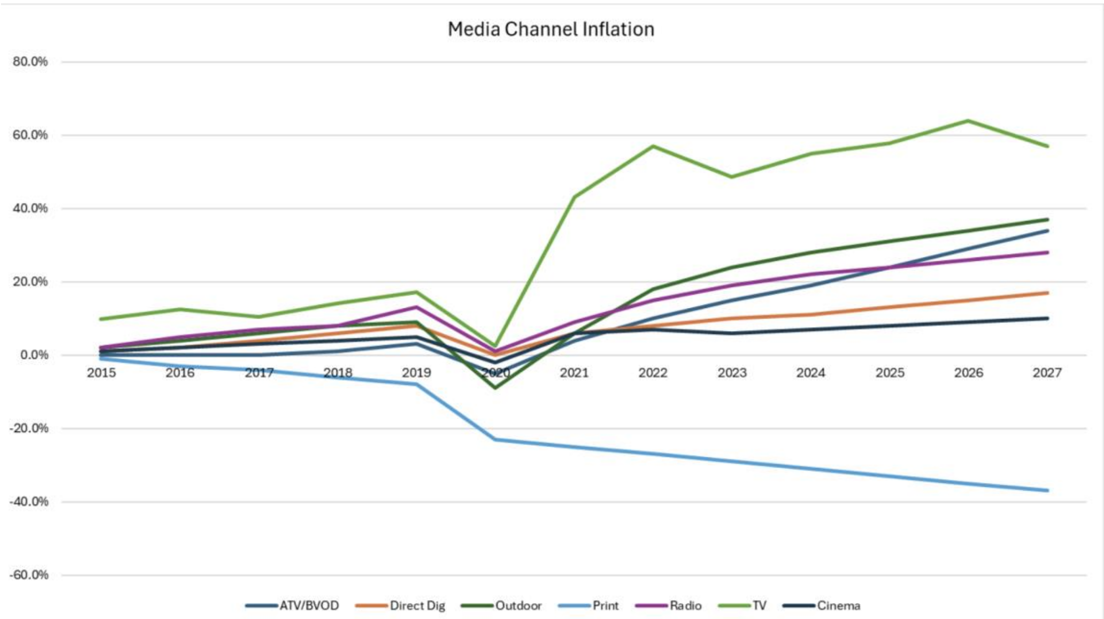

Fig 3. illustrates media inflation from 2015 (Visit Jersey's inception) and a forecast through 2027.

Rising media costs mean that Visit Jersey must invest more each year simply to sustain the same level of audience reach. Since 2015, costs have increased sharply across the channels relevant to destination marketing (TV +58%, Video on Demand (VOD) +24%, Radio +24%, Outdoor +31%, Digital +13%). In practical terms, without a budget uplift, Visit Jersey's ability to reach new prospective visitors diminishes each year.

The post-Covid travel market is more competitive than ever, with destinations aggressively fighting for visitors to accelerate recovery and secure future growth.

In addition to the core grant, Visit Jersey is receiving £2m per year in 2025 and 2026 through the Better Business Support Package (BBSP).

This funding is directly invested into consumer-facing activity to grow Jersey's visibility and appeal internationally, enabling Visit Jersey to:

- Deliver new route marketing campaigns aligned with Ports of Jersey route development fund and key transport partners
- Strategic tourism marketing investment in the reboot of Bergerac to deliver short term visibility and long term destination association, leveraging the show's global reach
- Accelerate product development and partnerships, eg: Jersey Tidal Trail

An increasing core grant that keeps pace with inflation would be ideal to focus on long-term planning and visitor growth and spend, thereby adding value to Jersey's overall economy. Temporary grants like BBSP help tactically, but they do not enable long-term strategic planning and delivery.

2. Intended Allocation of Grant Funding

The indicative allocation of Visit Jersey's Core Grant funding for 2026 is structured as follows:

Core activity	**% of total budget**	**Purpose**
Destination Marketing	80	Destination and brand campaigns in the UK, France and Germany, alongside cash-matched partner booking campaigns and year-round content development, delivered in collaboration with the tourism industry to enhance on-island experiences and underpinned by continuous visitor data collection, performance tracking and reporting.
Visitor Information	4	Provision of Visitor Information Services at the Jersey Museum.
Leadership & Strategy	10	Ensuring strong organisational leadership and strategic direction to deliver outcomes effectively and sustainably.
Administration and office costs	6	Providing essential administrative support and office operations to enable the organisation to run efficiently.
Total	**£4,720.00**	

3. Growth Markets and Key Projects (2026–2029)

Over the next three years, Visit Jersey's marketing activity will focus on three, key source markets and associated projects outlined below. In addition to these core markets, Visit Jersey will continue to work collaboratively with Ports of Jersey to develop new markets to expanded connectivity further into Europe.

- **United Kingdom:** Consolidating Jersey's position as a leading short-break destination, leveraging expanding route marketing partnerships with Jet2/Jet2 Holidays, easyJet/easyJet Holidays, BA Holidays and DFDS, and the release of Series 2 of *Bergerac* (launching 2026).
- **France:** Building on the success of marketing campaigns launched in France in 2025 to support the launch of the Blue Islands Paris route, targeted marketing in Normandy and Brittany to support ferry travel via DFDS and new partnerships with French tour operators (e.g. Salaun Holidays).
- **Germany, Austria & Switzerland:** Strengthening tour operator charters with Mundo Reisen, Rolf Meier and Prima Reisen with a focus on increasing the number of charters to Jersey from these markets.

4. Assessing and Demonstrating Value for Money (VfM)

Visit Jersey demonstrates value for money through a mix of economic, research, and marketing-performance frameworks rather than one single Value for Money (VfM) metric. This framework is comprised of economic impact, campaign ROI, and operational efficiency:

- **Economic Impact** – tracks growth in visitors, visitor spend, inward investment in the local economy
- **Marketing Campaign ROI** – major campaigns and events must deliver at least a 6:1 return
- **Robust Research and Digital Analytics** – includes the Jersey Exit Surveys (which track visitor volumes, spend, and NPS score, among other figures), Google Analytics 4 (GA4) and social media metrics to track behavioural changes and campaign effectiveness

Performance is regularly tracked and reported to the Visit Jersey Board on a quarterly basis. Monthly and quarterly updates are also shared with the Government of Jersey (Department for the Economy). Visitor statistics are published monthly and publicly available on the Visit Jersey corporate website.

This approach strengthens transparency and accountability, ensuring that Visit Jersey's grant is directed towards initiatives that deliver maximum economic benefit for the island.

Visit Jersey has also introduced **affiliate tracking with major travel partners**, enabling us to track conversion booking data, alongside referral-based data and insights, and enabling precise measurement of campaign-driven ROI.

5. Primary KPIs

Visit Jersey's corporate KPIs are designed to measure both marketing effectiveness and economic impact and are listed below:

Corporate KPIs	Marketing KPIs
Total visits	Unique website visits
Overnight leisure visits	Partner referrals
Average length of stay	Social media engagement – Facebook, Instagram and TikTok
Total spend	Non-government funded (NGF) cash-mash targets with partners
Net Promoter Score	Reach of earned media coverage (international)
Employee retention	

Performance is monitored monthly, quarterly, and annually, and reported to the Visit Jersey Board and Government of Jersey.

6. Summary

Following the COVID pandemic, destinations around the world have invested significantly in destination marketing to rebuild and grow their visitor economies - paired with economic pressures across all of Jersey's primary visitor markets, the competition for short-break travel is increasingly fierce.

To succeed, Jersey must cut through a crowded advertising landscape and compete on perceived value and quality of experience. Demand for memorable short-break travel remains high, and Jersey is well placed to convert this demand, offering a distinctive island experience, ease of access and a plethora of experiences which our target audience prioritise most.

Jersey retains important strategic advantages:

- Strong UK regional air connectivity, increasing in 2026
- The launch of *Bergerac* Series 2 in 2026, a unique brand-building opportunity
- A resilient proposition rooted in the island's outdoor, culture and food offerings
- Strong partnerships with airlines, ferry companies and tour operators

However, budget constraints over the past decade since Visit Jersey's inception limit the ability to convert these advantages into measurable visitor growth.

To illustrate the competitive context:

- Industry commentary suggests that many tourism boards invest between 5 -15% of visitor spend in marketing, although publicly-published benchmarks are limited
- Jersey's visitor economy (2024): £290m
- 5% benchmark investment: £14.5m
- Visit Jersey (core grant 2026): £4.7m = 1.6% of visitor spend

At current core grant funding levels, Visit Jersey will work hard to protect visitor volumes but is not able to unlock the growth required to sustain and expand connectivity and to increase productivity for tourism businesses.

Visit Jersey remains fully committed to delivering the best possible return on public investment and to leading a collaborative, data-driven approach to tourism growth.

Yours sincerely,

Signed by:
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