



2009 Marketing Plan

A blend of science and art

Simon Le Huray

What we'll be covering today



- Latest consumer attitudes towards holidays
- How have other countries performed?
- Jersey Tourism campaign overview
- Results to date
- Planning for 2010

Consumer Attitudes



Consumer attitudes and behaviour
towards holidays

Consumer attitudes towards holidays



- Fundamental change in behaviour towards holidays and short-breaks
- 'staycationists', 'recessionistas' and 'bargain hunters' now cut across all socio economic, demographic and UK regions
- Trading down: self-catering, camping & caravanning
- Consumers 'buying clever'
- Leaving it later and later to book, price often comes before destination

Consumer attitudes towards holidays



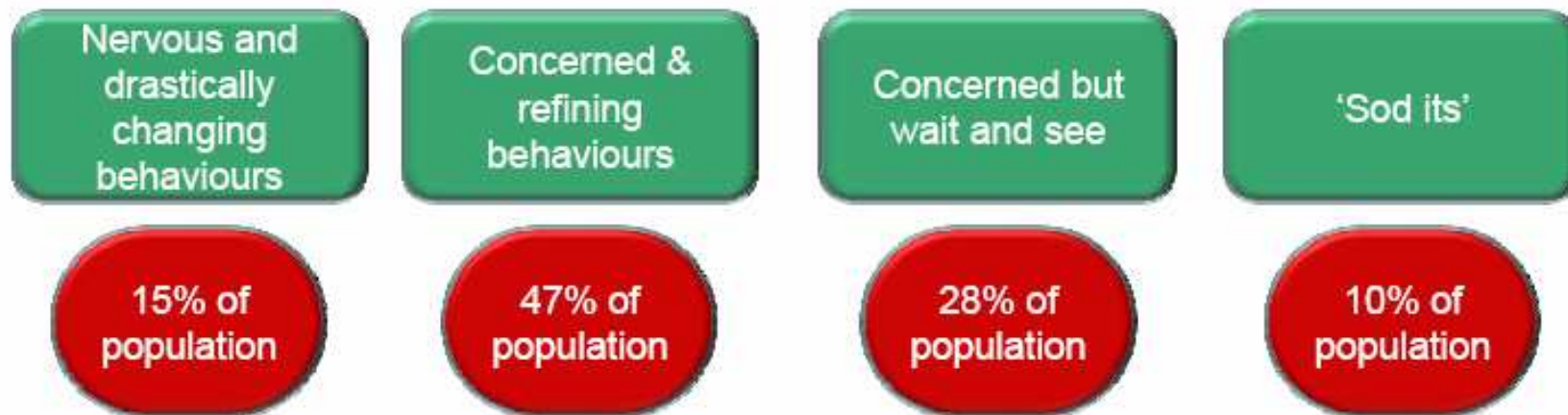
Much more time online

- Looking for same product at better price, driven by promotions
- Want holiday offers that create value by enhancing their experience and / or inspires them to do something different
- *Short-breaks* **abroad** and **London** most likely to be entirely sacrificed by many – and around 50% will be cutting their spend as well

Consumer attitudes towards holidays



New method of segmenting the market by taking into consideration emotional reactions to the downturn



UK Leisure Market Overview



All trips

- Overnights -14%
- Bed nights -15%
- Expenditure -15%

Specific trips

- holiday travel 15%
- business -13%
- VFR – 7%

Overview



How have other countries performed?

Europe



Euro zone and US market badly affected

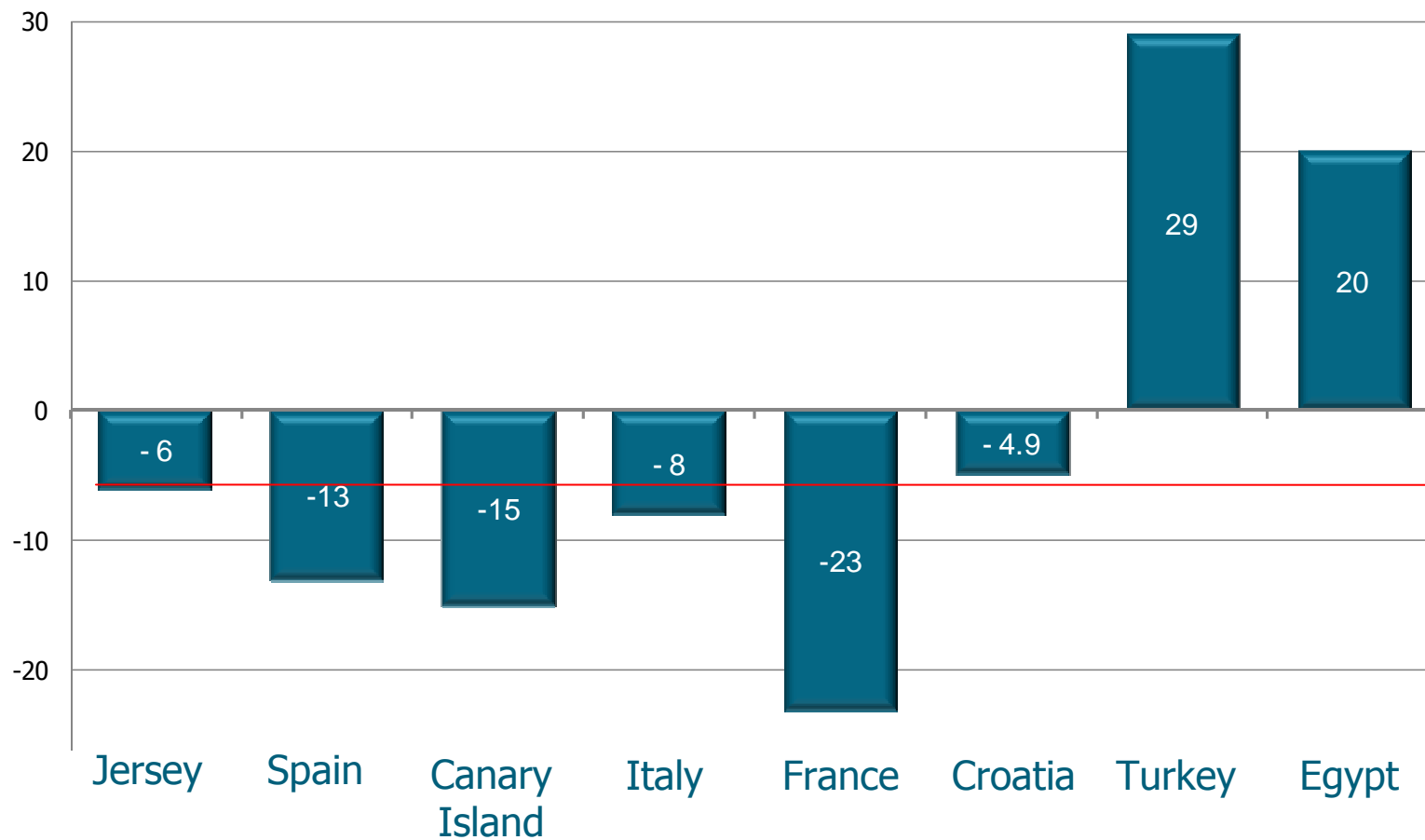
Heavy price discounting from Spanish market (40%)

Non Euro countries continued to grow

Camping, self catering and caravanning more popular

Poor UK summer result in last minute exodus to hotter - non Euro - destinations

Europe Leisure Market



Audience Question



Do you believe we should continue to use
“Europe without the Euro” next year?

1. Yes

2. No

Audience Question



How confident are you about next year?

1. Very confident
2. Confident
3. No change
4. Pessimistic
5. Very pessimistic

Overview



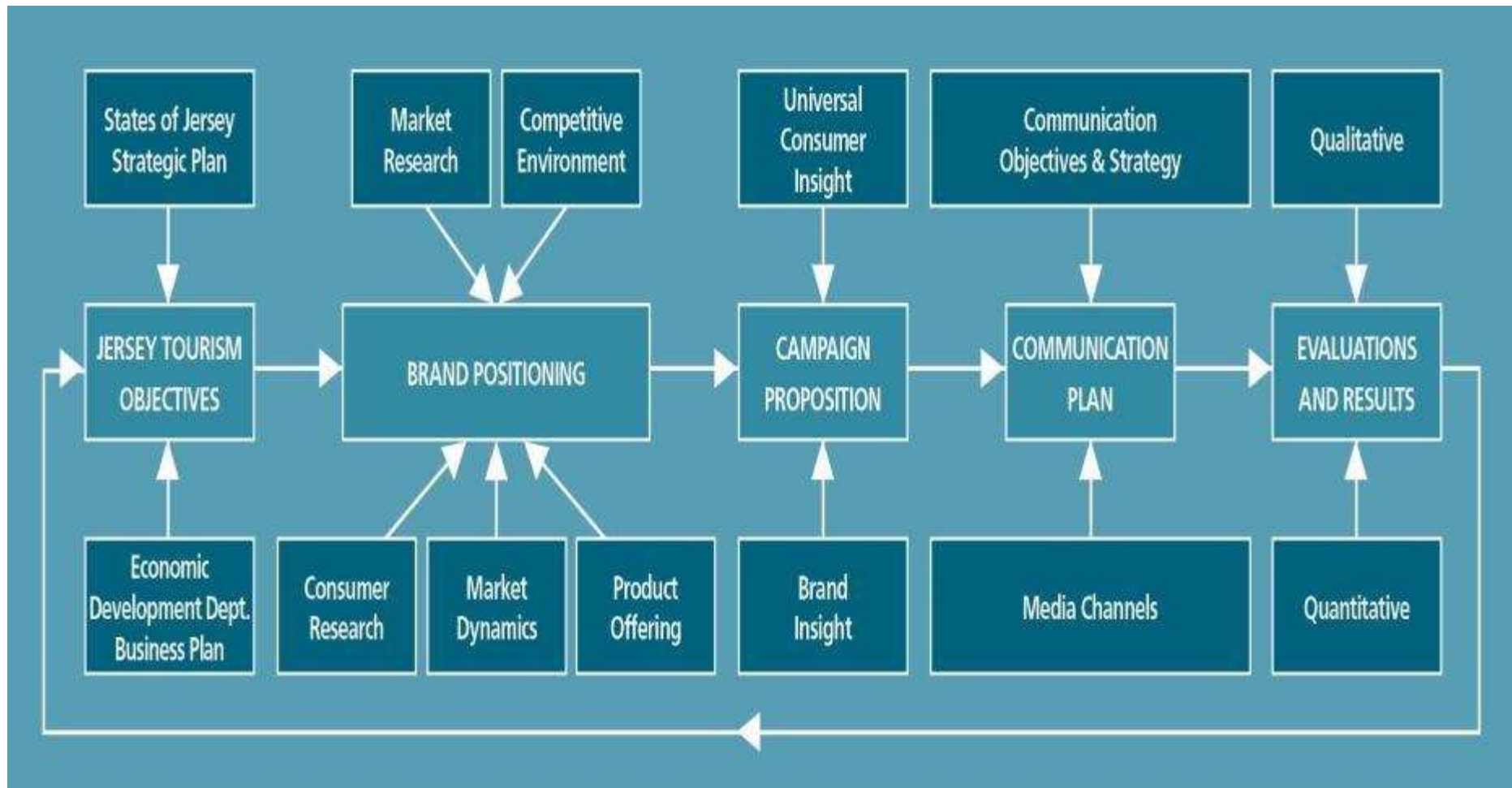
Jersey Tourism 2009 campaign overview

Objectives

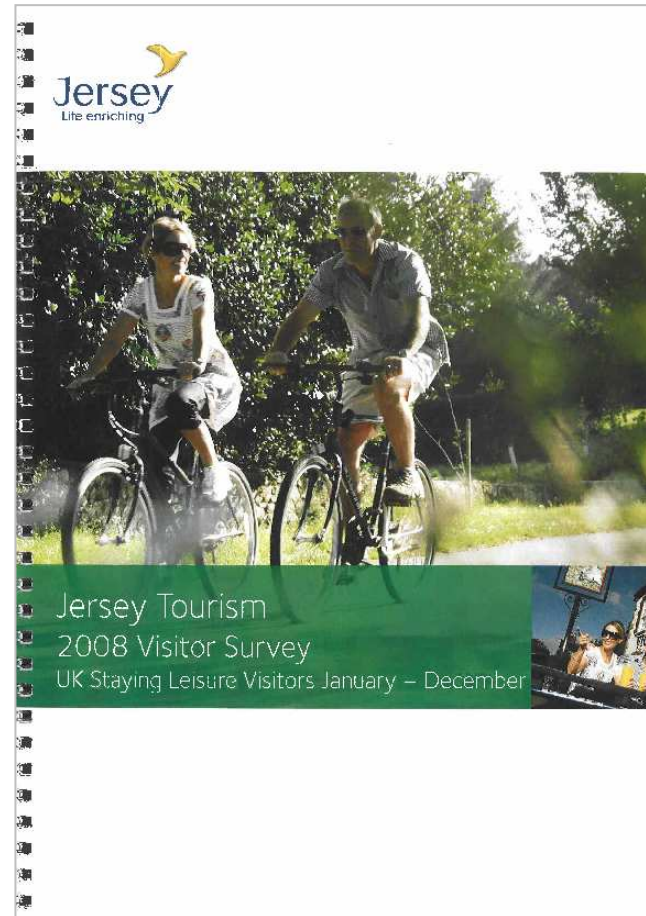
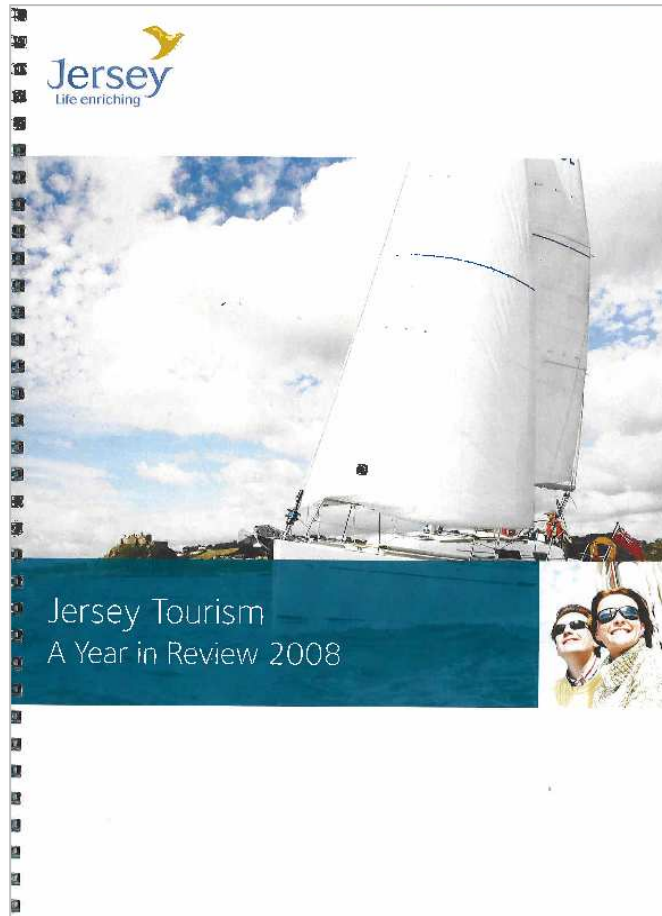


- Increase staying leisure visitors
- Increase average spend per leisure visitor
- Increase brand awareness and preference
- Support tourism partners
- Develop and support new tourism opportunities

The planning process



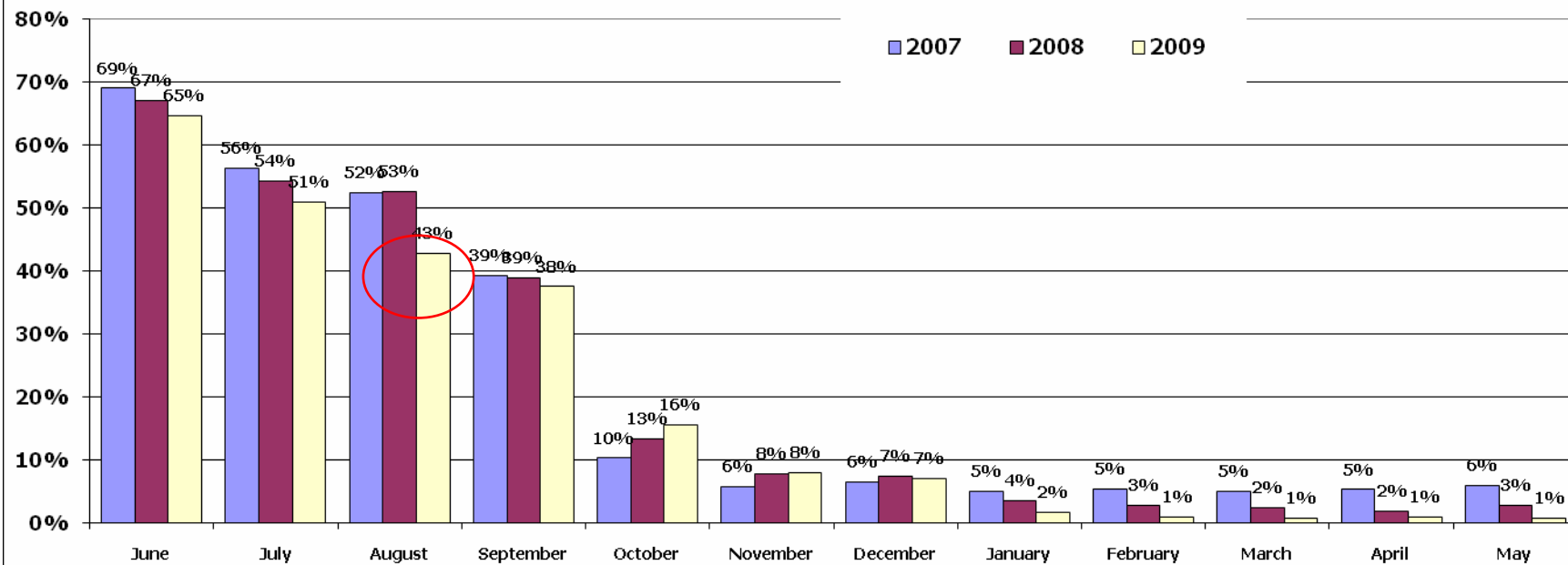
Research tools available



Forward booking survey



Forward Bookings (Rooms/ Units) as at 1st June - 2007, 2008 & 2009



Target audience

Our customers, or
so some think!

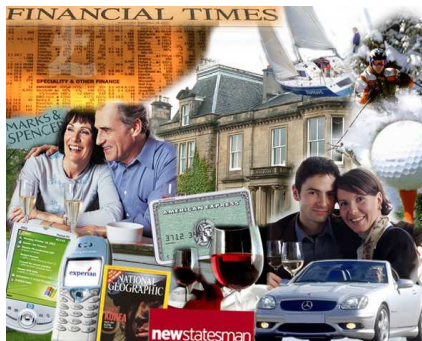


Key target audiences



SUBURBAN COMFORT

- 22% visitors
- Mature, predominantly empty nesters
- Active and affluent



SYMBOLS OF SUCCESS

- 19% visitors
- Mature professionals, affluent
- Quality brands



HAPPY FAMILIES

- 12% visitors
- Younger age group
- Value conscious

Reaching the right audience



	Brochure Pack Request 2009	On-Line visitors to Jersey.com		Actual Visitors 2008
		Jan 2009	July 2009	
Suburban Comfort	21%	20%	20%	22%
Symbols of Success	16%	14%	16%	19%
Happy Families	14%	17%	21%	12%

We know where they live



Audience Question



Which other audience segments should we consider targeting?

1.City Adventurers: twenty-something with active lifestyles (music, clubbing, eating out etc.)

2.Culture Seekers: historic and cultural activities

3.Ramblers: specifically into walking

4.Outdoor Actives: low impact land and water sports

5.Luxury Lovers: premium accommodation and gourmet experiences

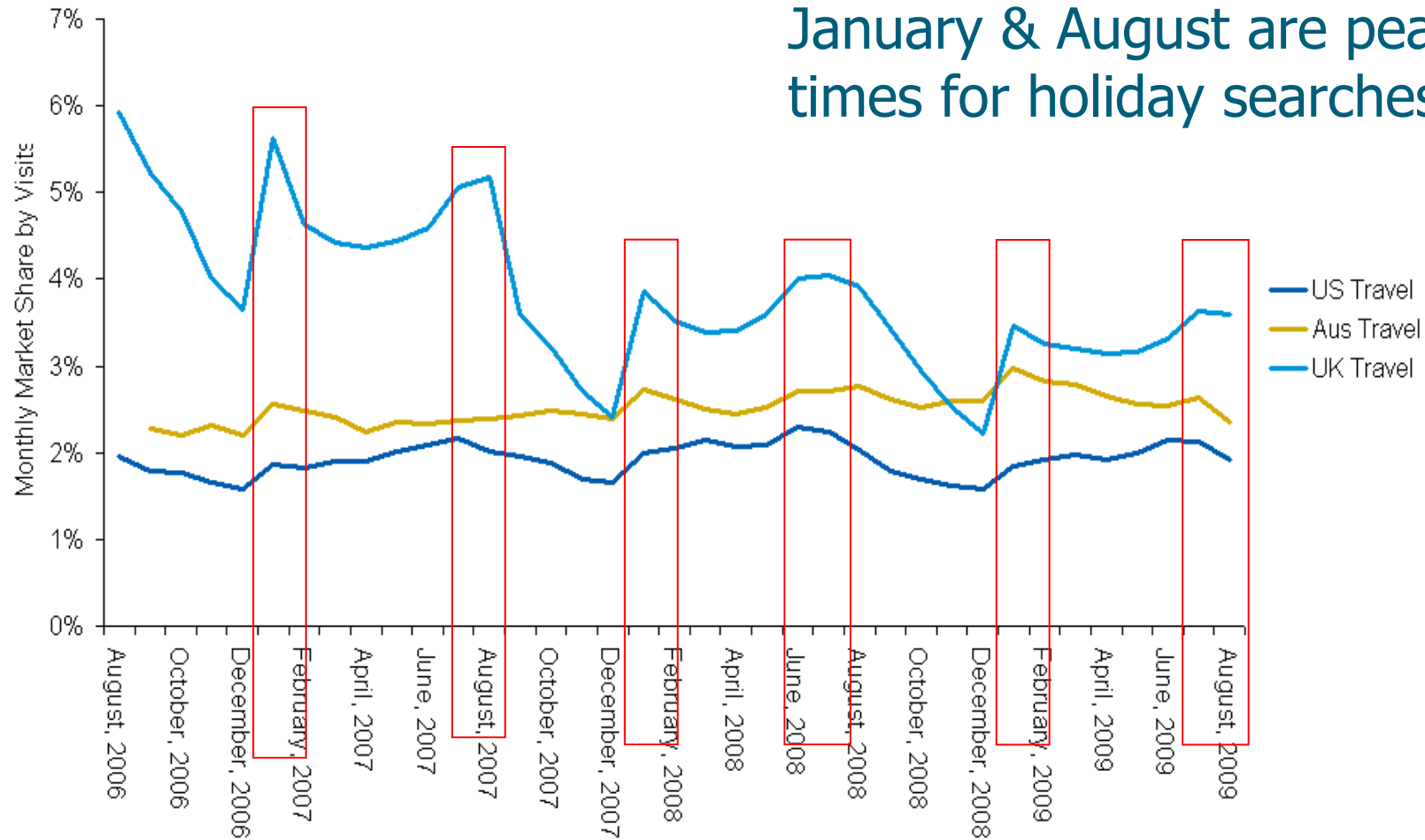
6.Others

Travel searches



Market Share of Online Travel

January & August are peak times for holiday searches

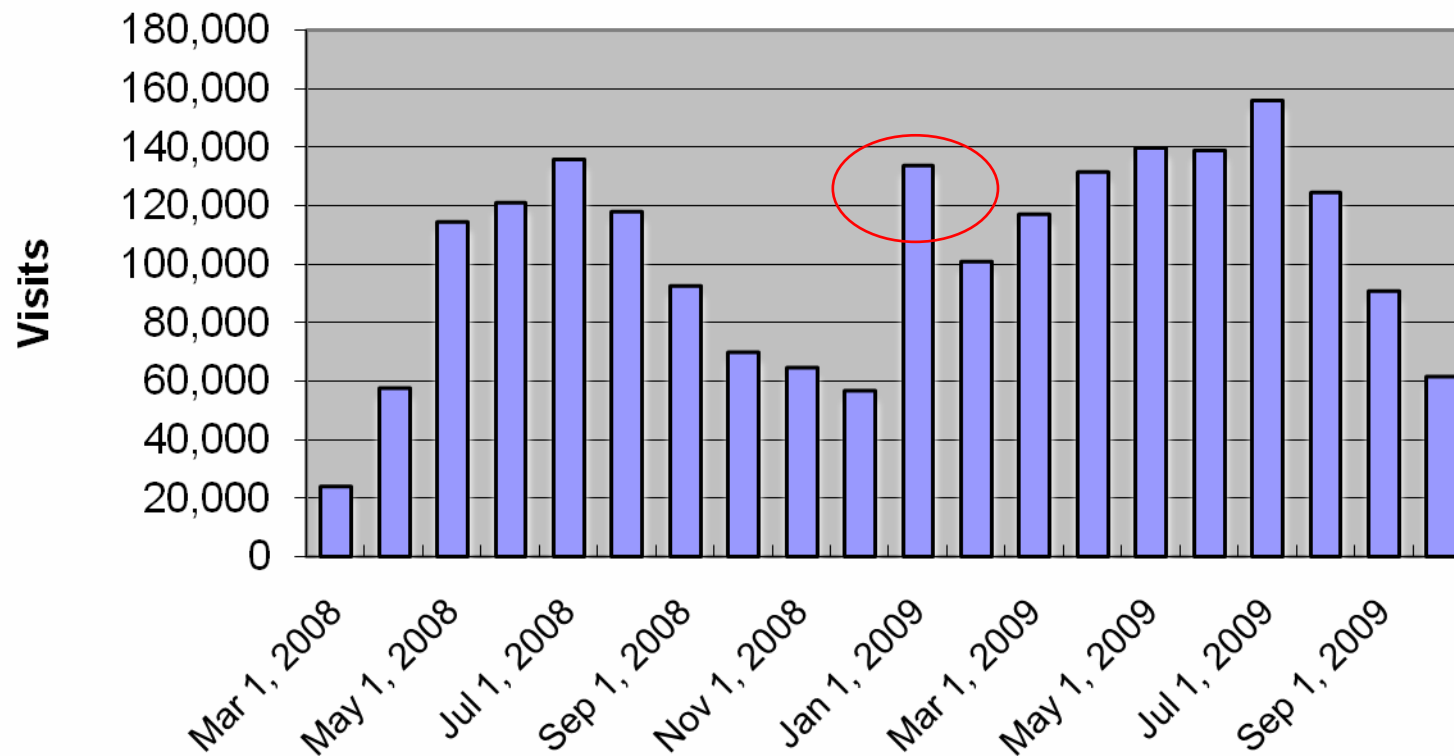


Source: Hitwise

Online season



Jersey.com Visits



The power of TV



UK beach ball searches



Weekly number of unique search terms represented as a share of all search terms, based on UK usage.

Created: 19/10/2009. © Copyright 1996-2009 Hitwise Pty. Ltd.



When to start advertising



	November	March	June
Booked	16% 5+ nights 8% 1-4 nights	33% 5+ nights 16% 1-4 nights	44% 5+ nights 20% 1-4 nights
Decided on destination but not booked	16% 5+ nights 12% 1-4 nights	14% 5+ nights 10% 1-4 nights	12% 5+ nights 10% 1-4 nights
Still Deciding	63% 5+ nights 68% 1-4 nights	40% 5+ nights 55% 1-4 nights	32% 5+ nights 47% 1-4 nights

66%

48%

Source: Paul Winstone Research

Communication Strategy



Marketing strategy

Build awareness of Jersey as a holiday destination

Convert interest into sales using offer based activities

Drive immediate sales from 'low hanging fruit'

Target Group

"British holiday seekers"

"Enlightened Waverers"

"Jersey Faithful"

Tactic

Brand advertising and public relations

Partner advertising and direct marketing

Direct marketing

Heavy advertising campaign



National TV campaign exposed to 20.9 million people and 7.4 million ABC1, 55+ audience



National Press advertising exposed to 8.7 million ABC1 55+ adults who on average could see the advertising 24 times



National 48 sheet poster campaign

Creative work



Jersey

EUROPE WITHOUT THE EURO


Enjoy Jersey
with your car

4 day Breakaways
from only **£149**

Condorbreaks.com
ASTA V1290

Stunning scenery, glorious climate, spectacular offers

Creative work



Lunch on fresh lobster landed that morning. Gaze at the fishing boats. Reflect on the benefits of paying in pounds and pence.

If your mouth waters at the thought of fine cuisine and fresh local produce, if your soul hankers after warm sea breezes and vast empty beaches, but your heart latches at the thought of the expense of a holiday in Europe, it's time to discover Jersey.



Just fourteen miles off the coast of France and excellent value for money right now,

this is Europe without the euro. Only 50 minutes away by plane or 3 hours by ferry, it's reassuring to know that continental break you thought had all but vanished is still within reach.

Why not discover Jersey for yourself? For your free *pureJersey* magazine, call 0844 888 5161 or visit jersey.com.

EUROPE WITHOUT THE EURO

Live the life.



The scenery has a European twist. The climate has a continental air. Even the pounds and pence have an exotic feel.


Gaze up to the summit of Mont Orgueil, its granite ramparts silhouetted against a deep azure sky, and you'd think you were in Andalusia. Cast your eye down to the quayside where ice-cream colored shops and restaurants cling to the rocks, and you could easily be in Brittany. But this isn't Spain. Nor is it France.

This is Jersey, Europe without the expense of the Euro. Only 50 minutes away by plane or 3 hours by ferry, that affordable European break you thought had all but vanished is still within reach.

Why not discover Jersey for yourself? For your free *pureJersey* magazine, call 0844 888 5161 or visit jersey.com.

EUROPE WITHOUT THE EURO

Live the life.



Creative work



EUROPE WITHOUT THE EURO

Picturesque by day. Spectacular by night. Perfect all year round.

If you fancy getting away from it all this autumn or winter, you don't have to go far. The bars and restaurants overlooking St Aubin's Harbour provide the perfect place to relax and soak up the atmosphere. From a fascinating history to a lively mid-December, Jersey has a character all

of its own. And with fast ferry crossings as well as flights from the UK in under an hour, not to mention great value offers, it's the ideal autumn or winter break.

For your free [janejersey](#) magazine, call 0844 888 5161 or visit [jersey.com](#).

Live the life.

EUROPE WITHOUT THE EURO

Amazing walks. Stunning cycle rides. Explore Jersey this autumn.

If you like to be at one with nature, you'll love Jersey. St Saviour's Fort, for instance, offers unique accommodation ideal for get-togethers with friends. Pack your days with everything from cycling to walking, and by night you can stop for a bite to eat at one of the many cosy beachside bars.

Best of all, with great value offers, fast ferry crossings and flights from the UK in under an hour, Jersey's the ideal autumn or winter break.

For your free [janejersey](#) magazine, call 0844 888 5161 or visit [jersey.com](#).

Live the life.

EUROPE WITHOUT THE EURO

Tingling sea air. Tantalising local cuisine. Tempting Jersey.

For a small island, Jersey has more than its fair share of natural beauty. Corbière Lighthouse is one of its most iconic landmarks, and the perfect spot to work up an appetite.

From Michelin-starred restaurants to beachside cafes, you've a huge choice of places to sample fresh local produce. And with great offers, fast ferry crossings and flights from the UK in under an hour, there's no better time to discover Jersey for yourself.

For your free [janejersey](#) magazine, call 0844 888 5161 or visit [jersey.com](#).

Live the life.

Enjoy Jersey with your car

EUROPE WITHOUT THE EURO

- Choice of over 20 hotels
- Lots of FREE Night Offers
- Includes fast ferry from Weymouth or Poole, sharing a twin or double room with breakfast
- Taking your car included
- Jersey, where your pound is still worth a pound

4 day breaks from **£149** per person

[Condorbreaks.com](#)
Book online or telephone **0845 60 33 124**
A&A V126

Discover Jersey for amazingly little

EUROPE WITHOUT THE EURO

- Jersey's favourite Hotel has nightly entertainment, Leisure Club and Aquadrome, pools, waterslides, sauna, steam room and new Flowerider
- Child discounts apply plus Free Kids Club
- Offer valid for bookings between 15-28 August

Half Board **£74** pppn
At 8 & 9 prices

[Merton](#)
www.mertonhotel.com
01534 724231

Delightful scenery. Stunning value.

EUROPE WITHOUT THE EURO

- Beachcombers or Ambassadeur Hotels including breakfast & return fast ferry.
- FREE dinner with wine, beer, insurance & fuel surcharges.
- Take your car from only £128 return.

4 days from **£286** pp
All inclusive

3X TRAVEL
0871 434 1410
www.3xtravel.com

EUROPE WITHOUT THE EURO

Jersey £89 from per person

- For 3 nights B&B including FREE car hire (one call, tax & petrol)
- Some FREE child places

[Las Chateaux Country Hotel](#)
01534 481480
www.laschateauxhotel.co.uk

EUROPE WITHOUT THE EURO

Great value to start

- By beach and lido
- Great food on the Promenade

4 nights for the cost of 3 **£120** pp b&b

[www.bayviewjersey.com](#)
01534 720950

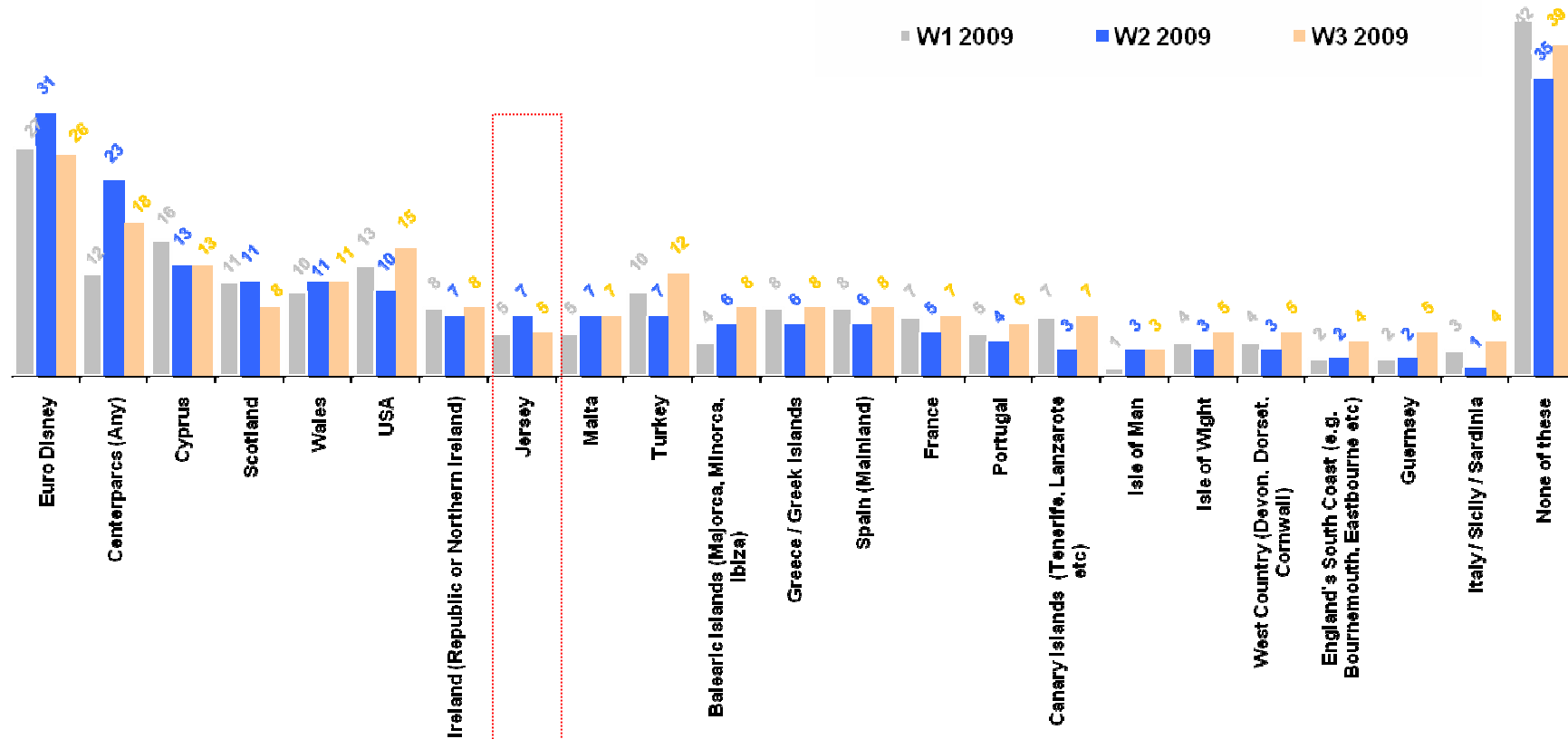
Results to date

Brand awareness has remained strong



- Prompted ad awareness rose significantly from 16% to **24%**
- TV increased from 13% to **22%**
- Press increased from 13% to **17%**
- Claimed knowledge of Jersey slightly up
- Prompted associations with Jersey showed positive perceptions
 - Beautiful beaches
 - Breathtaking landscapes
 - Good place to get away from it all
 - Clean and unspoilt
 - Rich and varied history and heritage
 - Interesting mix of French & English cultures
 - Spend quality time with your partner or family
- Consideration slightly down for short breaks at 40% (- 4%)
- Consideration for longer holidays of 5+ nights increased marginally

Outperforming other key destinations



Source: Paul Winstone Research

Planning for 2010



Planning for 2010



- Primary focus on driving enquiries and sales
- Improve CRM strategy and exploit Jersey Tourism customer database
- Increase trade marketing activities

Planning for 2010



Evolving Jersey Tourism's communication strategy towards a Tribal Marketing approach

Media is being consumed differently

- Fragmentation of media channels
- Digital Britain is a reality
 - 84% Digital TV penetration
 - 63% Internet penetration
 - 75% of UK internet connections are broadband
 - 110% Mobile phone penetration
 - 54% of mobile subscribers surfing the net through their mobile phone



Consumers

- Consumers are taking control and expressing their individuality...



Tribes



- They are talking to each other, forming their own groups and communities, and sharing experiences



facebook.



WALK BLOG

Ramblers walking forums
talking about walking



GroupTravelBlog.com








Old .v. New



- Embrace the changing communication style and marketing techniques

Old

New

Price		Value Exchange
Product		Experience
Transmit		Engage & participate
Preach		Advocate
Tell your audience		Build communities

Communities



Consider treating your audiences as **'communities of liked minded people'**

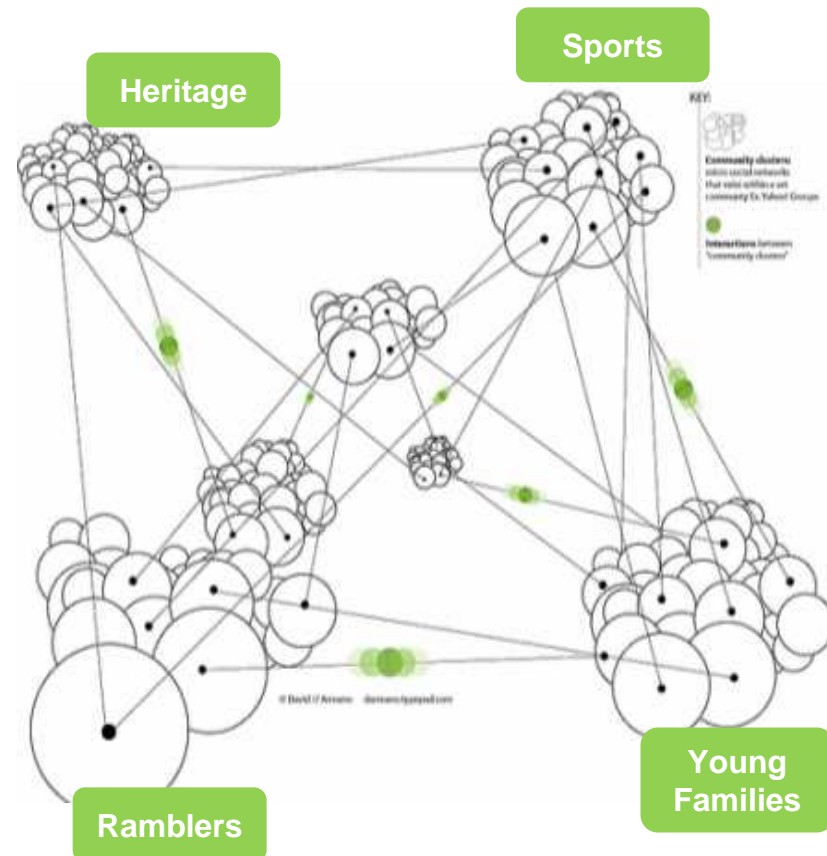
Use advocacy of previous visitors within each community to influence other people within their group

Adopt a "Tribal Marketing" approach

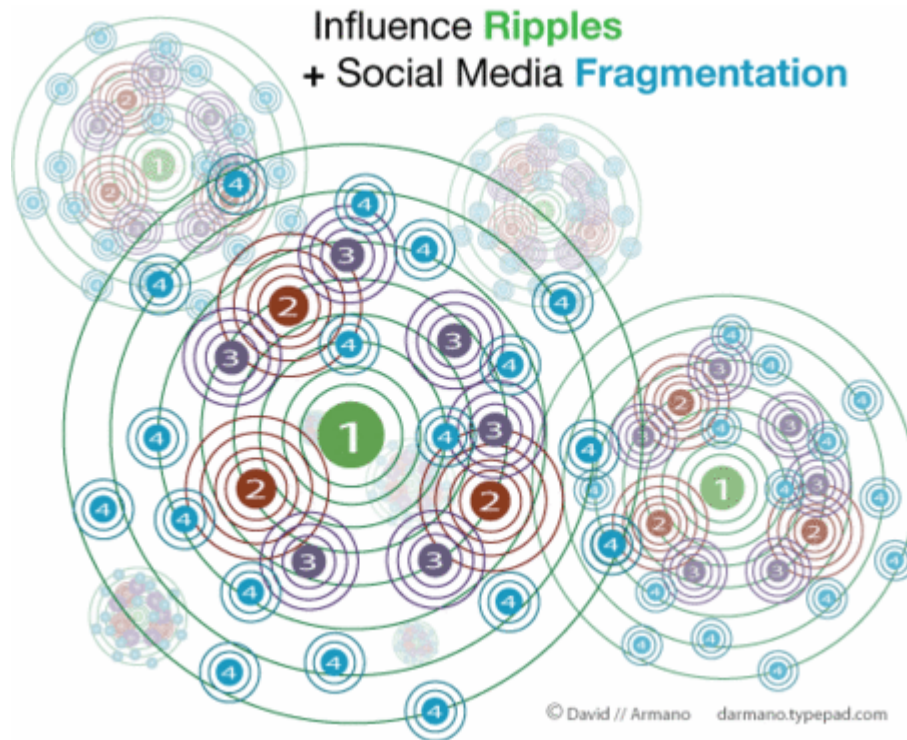
- Tribes and Tribal Marketing
- A tribe is any group of like-minded people, large or small, who are linked to one another by common interests and ideas
- A tribe might be connected by a shared dedication to an activity such as:
 - walking
 - water sports
 - holidays
 - life-stage (e.g. young families)

Tribes

- Each "tribe" is made up of micro-networks which also ***interact*** with other communities.
- Effectively connecting with these communities of people means translating marketing message into terms they can relate to.
- It can result in a deeper connection with each target audience – leading ultimately to more people coming to stay in Jersey



Ripples



A ripple is formed each time contact about Jersey is distributed

Many ripples can lead to larger ones

Both have value. Larger ripples are fewer in number but greater in reach

Smaller ripples can be greater in number and more targeted



Thank you



Thank you for attending
we'll see you at

Destination Jersey
Travel Trade Workshop
May 2010

www.destinationjersey.com