

**Minutes of a meeting of Visit Jersey Limited ("VJ")
Held at Visit Jersey, Commercial House, Commercial Street, St Helier, Jersey, on
Wednesday 26th February at 9.30am**

Present:	Kevin Keen (KK) – Chair
Patrick Burke (PB)	Keith Beecham (KB)
Catherine Leech (CL)	Tim Crowley (TC)
Amanda Wilmott (AW)	Sam Watts (SW)
(collectively referred to as the "Board" or the "Directors")	
In Attendance	
Alan Merry (AM), Interim CEO, Ports of Jersey (POJ)	
Darren Scott (DS), Economic Development Tourism Sport and Culture (EDTSC) (Observer)	
Louise Ashworth (LA), VJ (for item 6b only)	
David Edwards (DE), VJ (for item 5 only)	
Aimee Maskell, AM to PM Secretarial Services (Scribe)	

1. **APOLOGIES** – No apologies were noted. KK welcomed AM to the meeting and thanked him for agreeing to attend as an interim replacement for Doug Bannister. AM provided the Board with a summary of his career history and it was agreed that his POJ, Appointments Commission and public sector experience would be of benefit to the Board. AM also provided the Board with an update on the recruitment process for a new POJ CEO and **IT WAS NOTED** that an offer has been made, for which an acceptance was awaited.

2. **CONFLICTS OF INTEREST** – KK advised that he had taken on the role of interim CEO at CI Lines (owned by Paul Davies Freight) whilst they look for a replacement.

3. **MINUTES OF PREVIOUS MEETING** – The Board reviewed the previous minutes dated 12th December 2018, a copy of which were circulated with the agenda and **IT WAS RESOLVED** to approve the same, subject to a minor amendment.

4. **MATTERS ARISING FROM PREVIOUS MEETING** – KK took the meeting through the action log, a copy of which was circulated with the agenda and the following actions were discussed:

(a) **Revised Jersey Destination Plan** – KB reported that the revised JDP had now been issued and had received neutral or positive responses.

(b) **Date of Next Stakeholder Event** – **IT WAS NOTED** that the next stakeholder event would take place on the same day as the AGM (22nd May 2019) and it was agreed that on the technology at this event must run better than the previous event. KB welcomed the Directors' input on the content for the next event and **IT WAS RESOLVED** that the Directors would revert to him with suggestions by next week with a view to discussing an outline agenda at the Board meeting scheduled for 19th March 2019. **Action: Directors**

The Board agreed that the format and objective of the event needs to be defined and KB suggested that the objective was twofold: 1) launching the annual report and officially announcing how the 2018 has gone; and 2) looking forward to 2020-2023 and considering how to take tourism forward. Referring to the latter he suggested that this could be undertaken by way of round table discussions with each table chaired by a member of the Board leading on relevant topics, noting that this would prepare VJ for its business planning process scheduled to start in July. CL reminded the Board that consideration was also given to using a moderator to facilitate discussions at the event.

(c) **Feedback from Previous Stakeholder Event** – KB reported that two negative emails were received following the previous event. However, despite offering a meeting with the

individuals, no further responses have been received. KB advised that he was not familiar with the individuals and following discussion with the Jersey Hospitality Association (JHA) and industry regarding their comments, they appear to be unfounded. Furthermore, one of the IP addresses of the emails was based in EU. In answer to a question from TC, KB advised that whilst a list of those who register to attend stakeholder events is kept, a register of actual attendees is not.

(d) JDP Action Plan - KB reported that an action plan has been prepared and relevant marketing, product and trade activity has been launched. However, the plan includes activity for the next three to five years and therefore must be supported by industry to succeed.

(e) NED Benchmarking Exercise – KK advised that he has not yet carried out a NED benchmarking exercise and **IT WAS RESOLVED** that AM would provide him with details of HBA's figures from 2017 to assist in this regard. **Action: AM/KK**

(f) Director Activity – KK reminded the Directors submit details of the work they have undertaken for VJ (in addition to attendance at Board meetings) over the last 12 months with a view to responding the Comptroller and Auditor General's (CAG)'s recent report. **IT WAS NOTED** that this was discussed a recent Audit Committee meeting and it has been agreed to draft a template to ensure Directors follow the same format when recording this information. **IT WAS THEREFORE RESOLVED** that AW would circulate this for prior to the next meeting. **Action: AW**

(g) CAG Recommendations - **IT WAS NOTED** that the next meeting would focus specifically on governance issues and consider whether details of VJ's response to the CAG should be included in the Annual Report (in addition to the Chairman and CEO reports) or whether an additional governance document was required.

(h) Tourist Information Centre (TIC) – **IT WAS NOTED** that the erection of some Jerriaise signage in the TIC was a work in progress, perhaps delivered through a TV monitor as part of our Island's welcome.

(i) Website Platform Replacement – **IT WAS RESOLVED** that KB would present details on the website platform replacement at an appropriate time. **Action: KB**

(j) Dinner with contractors/suppliers – KB confirmed that he would schedule a dinner with VJ's main contractors/suppliers during 2019. **Action: KB**

(k) Statistics Unit – TC queried whether any progress had been made regarding the States' Statistics Unit taking on responsibility for research and calculation of visitor data and KB reported that DS had advised him that it was not the best time to broach this. However, whilst DS acknowledged that it was not an appropriate time, he suggested that it was still worthwhile raising the issue and **IT WAS THEREFORE RESOLVED** that he would schedule a meeting with KB and Duncan Gibaut. KK also offered to attend if required. **Action: DS/KB/KK**

(l) Gap analysis – PB sought an update on the proposed completion of a gap analysis, noting the importance of undertaking the same. KB noted that since the completion of a gap analysis was proposed, the revised JDP (which includes new recommendations for all stakeholders in the industry) has been issued and VJ's business plan has been updated which refers to targets rather than ambitions and highlights the difference between the two by stating that VJ is "on a journey" to reaching its ambition of 1m visitors/£500m spend by 2030. He added that VJ's targets will be tracked to effectively demonstrate this leading up to 2030 and suggested that the process of a gap analysis had been undertaken as part of the JDP update.

KB expressed concern about putting hard numbers against a gap analysis for fear of them being misunderstood and VJ being held solely to account for performance. This was echoed by SW who believes a gap analysis is needed but in a way that reflects this is a joint responsibility

between VJ, government and the industry.

5. 2018 EXIT SURVEY – VISITOR ECONOMY VOLUME PERFORMANCE REVIEW – DE was welcomed to the meeting and he provided a summary of his paper “2018 Exit Survey – Visitor Economy Volume Performance Review”, a copy of which had been circulated with the agenda. He suggested that although the figures did not yet to include detail on visitor spend and had not been audited by BDO, they provide a context of 2018 and he was confident of the figures contained therein.

Publication of the figures was discussed, and KB proposed including them in the next VJ e-newsletter (due to be issued in two- or four-weeks’ time) and **IT WAS RESOLVED** that DE would provide some more in-depth slides with more “story telling” around the data prior to publication. **Action: DE**

DE advised that the BDO Audit was not scheduled to take place until April and therefore publication of the results could not wait until this had taken place and TC welcomed publication of the results around Easter to help the industry start the season on a positive note.

DE provided an update on visitor spend and the following was noted:

- Visitor spend during 2018 was recorded at £264m which includes inflation and an increase of 10% on the estimated figure of £244m;
- The visitor spend figure of £264m is split between accommodation (£128m) and “other items” (e.g. shopping, activities, trips etc.) (£136m);
- Average spend per visitor was £370; and
- Average spend per night was £99.

Going forward KK requested a comparison of VJ’s performance against other destinations as part of the Exit Survey Results and DE agreed to provide the same. **Action: DE**

The increase in Net Promotor Score (NPS) from 47 in 2017 to 55 in 2018 was discussed and KK queried what the NPS had been in 2016. DE explained that although it was higher, the exit survey had not been running for a full year at that time. Therefore, he felt more comfortable with the figure now. **IT WAS RESOLVED** that DE would undertake more in-depth analysis of the NPS to establish how different types of visitors are rating VJ to help understand whose experiences need to be improved. **Action: DE**

TC sought confirmation that the miscount of data from September 2017 was now fully corrected and DE reported that all 2017 figures had been revised and all public facing documents now reflect the correct 2017 figures. He added that additional checks are now in place and therefore he was as confident as he possibly could be that all figures going forward will be correct.

CL highlighted two headlines from the data which caused her concern: (1) the decline in the percentage of first-time visitors (52% to 48%); and (2) the continuing fall in average length of stay (4.8 to 4.4). Referring to (2) she suggested reviewing other destinations to establish whether this is due to trend or whether it was a result of the “Island Break”. Either way, she stressed the importance of the requirement to sell more short breaks to make up for the short fall in visitor nights. She noted that the rating of 3.8 for value for money had also reduced.

MG reported that as an accommodation provider, he was not concerned about the reduction in average length of stay which he suggested was due to trend and was being experienced by all destinations. He added that short stay visitors spend well during their visit, although accepted that the attractions business may suffer from more short stay visitors.

AW referred to the statistics as overwhelming and advised that she was unsure what VJ should be focusing on or what was the most important. She queried what was expected from VJ in terms of the statistics and whether the target of £500m spend and 1m visitors by 2030 was now considered too simplistic. KK reported that the original JDP set expectations in this regard and

KB advised that the industry still consider the number of visitors and spend important. Therefore, whilst he stressed the importance that this should not be changed, he accepted that more focus should be placed on why certain targets are/are not being met.

KB noted that spend has grown by 10% and visitor numbers have increased by 3% and whilst these were positive results, consideration must be given to how they are used. By way of example, he suggested that any commentary around the figures should highlight that VJ is not solely responsible for Jersey's visitor economy and despite 2018's positive results, VJ/the industry should not be complacent because they are still not on track to meet the 2030 ambition.

The Board compared the following 2018 statistics against the original JDP expectations:

Statistic	JDP	2018
Visitors	766	725
Spend	£281m	£264m
Holiday Visitors	372	415
Rev Par	£74	£74
NPS	2% increase	17%

and **IT WAS NOTED** that the holiday visitor figure (which is the one statistic that VJ has the most influence over) exceeded the JDP ambitions. AM noted that the strikes in St Malo had an impact on travel to the Island last year whereas bookings from St Malo for this year are already showing an improvement of 5%-6%. He advised that a similar improvement has already been seen in passenger numbers at the airport.

TC stressed the importance of including comparisons with previous years and other similar destinations as well as comparisons against targets when releasing the statistics and PB proposed that the statistics are used to inform strategy. He noted from DE's summary that data from year to year can vary significantly. He therefore suggested that consideration also be given to five-year trends and using the data more scientifically. By way of example he noted strong growth from Germany, Guernsey and the Republic of Ireland and queried whether this was an opportunity for Jersey that was expected to continue over the long-term. Referring to Guernsey, DE reported that the data frequently changes and whilst some improvement was seen in 2018, he advised that it was not as much as anticipated. That said he expected increased opportunity in 2019 for both residents and visitors to make day trips to Jersey from Guernsey if the necessary approvals are given to operate a sea plane between the Islands.

AM suggested that Aurigny would be more relevant for the Guernsey market. He reported that Aurigny had just announced a twice daily service between Jersey and Guernsey and suggested that the sea plane service was unlikely to progress due to the significant investment required in its infrastructure. However, whilst DE welcomed the additional service by Aurigny, he stressed that this would only offer an opportunity if the fares are competitively priced.

Referring to Ireland, DE reported that (both North and South) was an opportunity for Jersey. **IT WAS NOTED** that Aer Lingus flies to Jersey six days a week in the summer and three days a week until October and DE suggested "tapping into" the visiting friends and relatives (VFR) market from Ireland. In answer to a question from CL, KB reported that the VJ Trade Team were working with tour operators in Ireland and consideration was being given to bringing them to Jersey for a FAM Trip.

CL's concern around the reduction in first time visitor numbers was briefly discussed and DE reassured the Board that the reduction from 52% to 48% was not statistically significant over a 12-month period. He added that the figure is continually monitored but, at present as it remains close to 50%, he did not believe there was any reason for concern, albeit that a continued reduction over a number of years would be a concern.

KB reported that when reviewing first-visitor data at a deeper level it highlights that the German

market (which consists of mainly first-time visitors) has grown whereas the UK market (which consists of mainly repeat visitors) has reduced. He therefore suggested that this may explain the slight reduction in first time visitors.

SW suggested that the most important statistic to report upon was whether the 1m visitor target will be reached and she noted that if the 2018 3% increase in visitor numbers continues the target will be reached. She accepted that whilst targets will not be met every year, it was positive that in 2018 both visitor numbers and visitor spend had increased. She therefore suggested that rather than being defensive when releasing the statistics (e.g. referring to the timing of Easter or strikes in St Malo etc.) the headline should be that VJ is feeling confident in order to instil confidence in the industry, noting that in order to meet the 2030 targets VJ and industry need to work together. She added that whilst any commentary around the data should be kept simple, any potential threats should be highlighted so that the industry can be signposted accordingly to ensure it keeps on track and buys in to what needs to be done to meet any gaps.

Bed capacity was briefly discussed, and DE reported a slight increase in 2018 compared to 2017 following the opening of Premier Inn. However, **IT WAS NOTED** that this will likely reduce in 2019.

DS expressed concern that despite data continually improving he found it difficult to establish success or failure and he suggested that VJ's stakeholders may experience similar difficulties. He also expressed concern that partnerships between, for example, VJ, POJ and the States were not working effectively, noting that members of the Board only became aware of the additional Aurigny Jersey/Guernsey route (discussed above) via the media.

To enable the Board to better understand the visitor economy data, SW proposed that DE compare it to the original ambition of 1m visitors/£5m spend by 2030 using a RAG rating format. This was welcomed by AM who noted that it was difficult to pick out key messages from the wide range of statistics provided and hard to know whether the statistics represented good or bad news. He referred to a report recently prepared for the POJ for the CICRA review **IT WAS RESOLVED** that he would share a copy of the same with the Board. He noted that this forecasts a 1% growth at POJ which he suggested goes against CICRA's recent decision. He expressed the hope that growth is higher but acknowledged that things can change very quickly and used the additional Aurigny route as an example. **Action: AM**

KK thanked DE for his summary of the 2018 figures and noted with regret that DE would be leaving VJ in May to return to the UK. DE left the meeting at 10.40am.

6. MARKETING – LA was welcomed to the meeting and she provided the Board with a presentation covering the 2019 marketing programme, product trade and marketing alignment and the marketing team structure.

Questions were taken from the Board throughout LA's presentation and CL referred to LA's previous concerns around PR, in particular focus being placed on digital and influencers rather than traditional marketing and One Green Bean's way of working and she queried whether VJ continued to work with One Green Bean. LA reported that One Green Bean's contract remains in place for another year and accepted that as they do not have a strong focus on traditional media. CL suggested a number of travel editors have not even heard of them. LA advised that she was unaware of the rationale upon which they were originally appointed as this took place prior to her own appointment. However, she has highlighted the importance of traditional media to them together with the requirement to work with influencers on a tiered basis (e.g. bronze, silver, gold), noting that not all influencers should receive the same level of services.

LA reported that One Green Bean's output is monitored by Gorkana; monthly KPI exist on which they report, and she reassured the Board that she follows up with them if the KPIs are not being met. The Board noted that feedback from Gorkana was previously received on an annual basis

which made it difficult to follow up and address any issues that may have arisen during the year and KB explained that VJ were now working on a more proactive basis using Gorkana's expertise to establish media audiences- who VJ should be working with in terms of influencers. LA added that guidelines are also now in place in respect of bronze, gold and silver influencers which will enable better monitoring and she confirmed that One Green Bean are on board with the mechanism that has been put in place.

In answer to a question from TC, LA confirmed that the contract with One Green Bean is for an agreed price. However, under the mechanism, she suggested that VJ receives more for that price than previously and she confirmed that the contract will be revisited if they do not meet the requirements which have been set.

PB sought further details on the role of Gorkana and LA advised that they are world leaders in measuring the effectiveness of PR and advertising and that they are engaged by VisitBritain, Visit Scotland and Visit Wales. She explained that Gorkana determines how well VJ's core message is coming across and also considers negative perception, noting that it is important for VJ to demonstrate that it is trying to change this. She added that they also help VJ align opportunities through PR and brand messaging. **IT WAS RESOLVED** that LA/KB would provide a more in-depth presentation on the analysis provided by Gorkana at a future meeting.

Action: KB/LA

TC noted that the winter campaign resulted in a delivery of 23% during Q4 2018 and Q1 2019 and he queried the cost of the same. LA advised that content cost approximately £50k and media cost approximately £200k. However, **IT WAS RESOLVED** that she would revert with exact figures in this regard. **Action: LA**

TC welcomed a breakdown showing expenditure on each campaign comparative to outcome and **IT WAS RESOLVED** that LA would prepare a breakdown for each season. However, KB suggested that it was important to highlight that a significant amount of campaign expenditure, (particularly in relation to content creation) will be re-used for future campaigns (yet to be agreed) and **IT WAS THEREFORE RESOLVED** that LA would refer to this in the breakdowns to be prepared. **Action: LA**

PB advised that he would also welcome a breakdown showing the split between digital and traditional print for each campaign and LA reported that in order to obtain the right level of coverage throughout the year, VJ uses 80% digital and 20% print with alignment with PR. KB reminded board members that we are led by consumer media habits and do not unquestioningly follow a digital first approach.

LA provided the Board with a summary of the themes VJ proposes to use throughout 2019. She noted that these arose from input from the Product Action Group (PAG) and explained that it will enable content to be re-used thereby resulting in cost savings. She acknowledged that this will require a significant change in the approach currently used by VJ and sought the Board's patience in this regard. However, she reassured them that it will be of benefit in the long-term.

AW welcomed the improved alignment between marketing and product, and she queried if similar improvements have been seen with trade. LA described this as a "work in progress" and KB explained that due to trade's longer working requirements, they were likely to become more involved with product and marketing over time, noting that trade will require product and marketing content to present to its partners. However, he advised that work is already on-going on a Liberation 75 campaign for 2020 with a view to presenting the same to VJ's German trade customers at ITB.

SW expressed concern that the 2019 Marketing Campaign appears to be product-led rather than emotionally-led. She stressed the importance of VJ's campaigns changing how visitors "feel" and "think" about Jersey and by way of example, she suggested that focus be placed on a

family getting away from day to day life and reconnecting in Jersey and show products relevant to that experience.

SW expressed concern about the proposed "from field to fork" theme and suggested that this approach may not be bold or brave enough. Referring to the proposed "Gorilla Trail" she expressed concern that this may lack creativity and suggested that this should highlight a family following the trail rather than the trail itself. LA accepted that her explanation of the themes may have not done them justice. However, she reassured the Board that there will be multi-generational families included in the videos to support them and focus will be placed on emotion and product, with product being secondary to the visitor experience and she believes the balance between the two is right. MG added that a similar "trail" was undertaken in Brighton and it worked very well to "reconnect" families.

SW accepted that VJ should have "always on" content to enable potential visitors to get more detail about certain things (e.g. food suppliers) but suggested that more should be done around its paid channels. She stressed that whilst campaign briefs do not need to be complicated, they should appeal to the type of visitors Jersey wants to attract and use products to "bring them to life". LA reassured the Board that this brief has been followed and **IT WAS RESOLVED** that she would include details of VJ's target audience in future presentations. **Action: LA**

KB noted that the Senior Management Team (SMT) debated similar concerns to those expressed by SW and are aware of the importance of maintaining the creative engagement when bringing product and trade together to ensure that VJ's campaigns continue to inspire customers.

In answer to a question from PB, LA advised that VJ were currently using Oi as their creative and digital marketing agency. However, whilst they are scheduled to create six edits for VJ's Spring and Autumn campaigns, their contract will be put out to tender in June/July 2019.

TC acknowledged that any outcome from the PAG would be product-led. However, he queried whether those working on Island on VJ's campaigns were possibly being too constrained and whether they required a refresh going forward. By way of example, he suggested using photos which look back from the sea rather continually using photographs of people looking out to sea. DS acknowledged that whilst significant work had clearly gone into the 2019 Marketing programme, he shared SW's nervousness around whether it was bold enough and, due to staffing issues, he expressed concern as to whether LA had been able to offer it her full attention. He added that he was also concerned about VJ referring to "re-purposing of assets", noting that this may indicate to government that VJ is not using the level of grant it is receiving thereby leading to a reduction in 2020.

AM expressed surprise that an organisation as small as VJ had been working in silos and welcomed the fact that the teams were now more aligned. However, whilst he accepted significant work had gone in to putting the 2019 Marketing programme together, he noted that he did not have sufficient knowledge to comment in terms of whether it had the appropriate balance between product and emotion.

Marketing resource was discussed, and CL queried whether LA felt she was adequately resourced to achieve what was required to deliver the 2019 marketing programme and generate activity in the market place. LA acknowledged that although it was a very difficult and challenging programme, it was doable. She added that whilst resourcing had been a challenge, particularly PR resource, VJ sought the relevant advice when updating job descriptions and making changes to the existing structure and she expressed the hope that this will resolve the issues. LA reported that a three-month trial was agreed following the implementation of these changes and this is due to expire at the end of March. However, it has been agreed to extend this by a further three months as an additional flexible working request has recently been received from a member of staff and therefore this will need to be dealt with accordingly through

VJ's flexible working policy.

The most appropriate structure for the marketing team was discussed and LA advised that she felt comfortable with the proposal she shared prior to Christmas. She reported that she had worked further on this with AW and SW and they asked her to consider salary banding throughout the structure, the review of which was only completed the previous day and therefore was not circulated with the agenda. She advised that based on the revised job descriptions all staff members were being paid within appropriate bandings and, as a result of some skills gaps which were identified by the review, some staff were, in fact, being over paid. However, she reassured the Board that staff development programmes were now in place to deal with this.

PB advised the importance of monitoring PR carefully and he requested that the marketing team keep PR at the forefront of their minds.

The Board welcomed the clear progress which has been made in bringing the marketing and product teams together and acknowledged that closer working with the trade team still remained a work in progress. KB added that a significant amount of the "machinery" of marketing has now been fixed which will help deliver better outcomes and whilst he accepted some of the Board's concerns around the 2019 marketing programme, he reassured them that the creative will show that it is a customer-led (not a product-led) campaign which will continue to push emotional engagement and link better to product experiences.

KK thanked LA for work she had achieved in a short space of time, particularly with the added complexity of staff issues. LA thanked the Board for their helpful feedback and left the meeting.

7. ANALYTICS AND EVALUATION EXECUTIVE ROLE AND JOB DESCRIPTION – IT WAS NOTED that a job description for the role of Analytics and Evaluation Executive was circulated with the agenda and discussed by the Board.

8. CEO REPORT INCLUDING TRENDS REPORT - The Board noted KB's CEO Report, a copy of which was circulated with the agenda. **IT WAS NOTED** that the Audit Committee discussed the risk around Flybe at their recent meeting and an update was sought from AM on the same. AM reported that whilst the impact of the take over by Virgin was still unknown, he suggested that Jersey should not be affected until at least October which is when next year's routes will be agreed. He suggested that at this stage they may look to negotiate with POJ around costs and accepted that there were weaknesses around some routes (e.g. Doncaster). He added that there would be benefits from code sharing on other routes such as Manchester which would allow passengers onward connectivity. However, he reiterated that their full plans were still unknown and advised that it would all depend where Virgin decide to put their assets.

9. RISK REGISTER – The Board reviewed the Risk Register, a copy of which had been circulated with the Board pack and **IT WAS NOTED** that Flybe and Brexit were on-going risks.

10. 2019 FORWARD BOARD MEETINGS CALENDAR – The Board noted the 2019 Forward Board Meetings Calendar, a copy of which was circulated with the agenda.

11. AOB - IT WAS NOTED that SW has indicated that she will resign as Director of the Board following the AGM on 22nd May 2019. The Board agreed that rather than leaving her position available, consideration should be given to appointing another Director with similar marketing experience.

12. DATE OF NEXT MEETING – IT WAS NOTED that the next meeting was scheduled for Tuesday 19th March 2019 at 1.30pm at VJ's Office.

There being no further matters to discuss, the meeting was closed at 1.10pm.