

Minutes of a meeting of Visit Jersey Limited ("VJ")
Held at Visit Jersey, Commercial House, Commercial Street, St Helier, Jersey, on
Wednesday 22nd May 2019 at 9.30am

Present:	Kevin Keen (KK) – Chair
Keith Beecham (KB)	Patrick Burke (PB)
Tim Crowley (TC)	Catherine Leech (CL)
Sam Watts (SW)	
(collectively referred to as the "Board" or the "Directors")	
In Attendance	
Alan Merry, Interim CEO, Ports of Jersey (POJ)	
Rick Horsley (RH), Economic Development Tourism Sport and Culture (EDTSC) (Observer)	
Darren Scott (DS), EDTSC (Observer)	
Aimee Maskell, AM to PM Secretarial Services (Scribe)	

1. **WELCOME AND APOLOGIES** – KK welcomed RH to the meeting and introductions were made around the table. Apologies were noted from Amanda Willmott (AW).
2. **CONFLICTS OF INTEREST** – There were no conflicts of interest to note.
3. **Q1 EXIT SURVEY AND OUTLOOK FOR SEASON** – The Board reviewed a paper summarising the results of Q1 Exit Survey and outlining the outlook for the season, a copy of which had been circulated with the agenda. KB reported that whilst the figures were up on the same period for 2018, there were a number of caveats to these, and he therefore remained cautious around the improved figures. Furthermore, he highlighted that Q1 only represents 11% of the year's total and are therefore only a small percentage overall.

The Board noted that in Q1 the net promoter score had increased to 55; visitor nights were up; and whilst there had been growth from Guernsey and the UK, visitors from France were weak, particularly during March, albeit that this could be due to the timing of Easter. AM reported that the Board of Ports of Jersey was provided with up to date passenger statistics at a meeting the previous day and, compared to last year, these show an increase of 10% and 6% for April and the year to date respectively. He added that British Airways, Blue Islands and easyJet have also seen increases whereas Flybe are down and the harbour is flat. Referring to the latter, he noted that the statistics were collated prior to Condor's recent mechanical issues.

KK suggested that year on year comparisons are not always relevant and this was echoed by KB who noted that the Island experienced bad weather in Q1 2018. AM added that Condor was also badly affected by bad weather in 2018. PB expressed concern about which figures VJ should be focusing on. He welcomed the positive Q1 figures and accepted that this may be due to exceptional circumstances (e.g. bad weather last year or the timing of Easter). However, he reported that the STR figures collated by accommodation providers were now available for the first four months of the year and these show that all properties were up by 0.8% on occupancy and down by 1.3% on their average rate, resulting in a reduction in RevPAR. To put this into context, he explained that a growth of 2-4% was required per year, noting that it has been recognised that inflation is currently 3.5%.

PB stressed that the STR figures were very accurate and not based on a survey. However, they were not where the accommodation providers would like them to be. He added that the STR figures relate to the whole of the market and therefore agreed to share them with the Board.

Action: PB

SW expressed concern about the reduction in bed nights. She accepted that whilst it was important to increase visitor numbers, consideration also needs to be given to value and she questioned whether the Island Break campaign was affecting this. KK agreed that there should be caution around the figures given the time of year and KB reiterated that they only reflect a

small percentage of the season. Nevertheless, they highlight strong growth in the four to six and seven plus night stays. However, SW noted that year on year these figures are down.

TC stressed the importance of comparing the survey results with the STR figures, noting that the STR results are based on fact and KB reassured the Board that whilst the direction of travel is positive, caveats will be included when circulating the Q1 exit survey figures to stake holders to highlight that the position should be considered in totality. By way of example, he noted that the number of available Airbnb properties has significantly increased and MG suggested that consideration should be given to whether AirbnbB properties on the Island are being operated within the current housing laws.

The business market was discussed and KB advised that this has been impacted by people booking later as well as Brexit and improved technology. He acknowledged that this was a key market for hotels and noted this was a slight concern for them at this stage.

CL suggested that it was difficult to compare Jersey's Q1 figures to competitor destinations, as they will be skewed by the high number of self-catering accommodation available elsewhere which sells itself to longer stays. However, KB reported that Visit Britain is in a negative position in terms of domestic holidays for the first quarter of the year and advised that their number of nights are also down.

Going forward SW proposed that the Exit Survey results are compared against VJ's overall targets of 1m visitors and £500m visitor spend by 2030 and KK referred to the revised Jersey Destination Plan (JDP) which includes a revised target of 783k holiday visitors in 2019, noting that this was close to being met. SW proposed communicating how far off track VJ is from this target to encourage support from stakeholders in meeting it. The importance of including comparisons with targets was also welcomed by AM, who noted that this would avoid the need to reference other documents such as the JDP. KB advised that number of holiday visitors was currently at 95% of the 2019 target, and KB reported that this had been communicated to the Comptroller and Auditor General (CAG) and included in VJ's Annual Report.

KB reminded the Board that the JDP was updated with revised targets in 2019. However, whilst the annual report refers to them and VJ is on track to meet them, he remains nervous about reporting against them in his public monthly statements as he will then be required to defend them. However, the Board agreed that the comparisons against targets should only be provided internally on a quarterly basis for the Board's information. **Action: KB**

There being no further comments on the Q1 Exit Survey Results, **IT WAS RESOLVED** that KB would draft a summary of the same for circulation to stakeholders on Wednesday 29th May 2019. **Action: KB**

4. Q1 2019 REPORT FOR EDTSC – The Board reviewed the Q1 2019 Report due to be submitted to EDTSC, a copy of which had been circulated with the agenda. Referring to the KPI Outcomes, CL proposed updating the 2019 Forecast/Target column with updated information based on the Q1 2019 Exit Survey results (discussed above) and **IT WAS RESOLVED** that KB would update this accordingly prior to submission. **Action: KB**

CL requested a copy of the results of the most recent stakeholder survey undertaken by Ecorys and **IT WAS RESOLVED** that KB would place a copy of the same in the Board "portal". **Action: KB**

KB reported that Ecorys' report shows that VJ is demonstrating value to its partners with 77% of off-Island suppliers and 78% of on Island suppliers being "satisfied" or "very satisfied" with VJ.

The P&L included in the EDTSC Report was briefly discussed and KB confirmed that he was comfortable with current spending.

Based on the discussions around the Q1 Exit Survey, **IT WAS RESOLVED** that KB would include a paragraph in the EDTSC Report around the Q1 numbers together with the appropriate caveat.



Action: KB

5. CEO REPORT AND TRENDS REPORT (INCLUDING ANNUAL REPORT AND INFOGRAPHIC) – The Board reviewed KB's CEO Report, the Trends Report, Annual Report and Infographic, copies of which were circulated with the agenda and KB highlighted the following points from his CEO Report:

(a) Ireland – IT WAS NOTED that efforts are being made into the Irish market and KB reported that VJ representatives recently visited Ireland together with on-Island partners, the feedback from which was very positive. He suggested that the travel industry has a role to play in this regard with respect to the booking process and noted that media were invited to some of the events held and he therefore expects good coverage to be received from the same. The Board welcomed the opportunity from Ireland, noting that it had the potential to become bigger than Germany.

(b) Norway – KB reported that the CEO of a Norwegian travel firm recently visited the Island with a view to bringing Norwegian (young and old, leisure and MICE) visitors to Jersey. The Board noted that the CEO was introduced to a number of local suppliers during his visit and he has been provided with a series of itineraries to consider. KB welcomed the fact that the CEO does not anticipate the lack of direct flights to the Island being a barrier for Norwegian visitors and, in answer to a question from KK regarding next steps, he noted that Sarah Barton (SB) was leading on this opportunity and will feedback when the CEO has reviewed the itineraries provided.

(c) Holland – IT WAS NOTED that representatives from Sunair were recently in the Island together with 55 travel agents to experience the Island Break and early post-survey results are positive.

(d) Germany – KB advised that VJ works with German tour operators who have a good understanding of Jersey. However, as the retail operators have less understanding, a training programme has been established for them with a view to improve this. In answer to a question from PB, KB confirmed that although it had been delayed the tender process for Germany was due to start shortly.

Referring to VJ's use of German tour operators, MG queried whether the same approach was always the right approach and asked whether VJ should continue to use tour operators simply because this is what has always been done. KB noted that it has not been an easy year for the German market and advised that despite working hard to promote the routes to the Island, current sales are "flat at best". He noted that VJ is therefore finalising a programme of marketing with the German tour operators with a view to boosting sales.

KB suggested that marketing to Germany may be something the Board wants to consider at the away day, scheduled for 17th July 2019. He advised that Jersey currently only has Saturday flights which prevents someone easily coming from Germany to the Island for two or three days and he therefore stressed the importance of encouraging connectivity in this regard.

(e) Switzerland – IT WAS NOTED that the Swiss Operator has sold a positive number of seats (77% capacity) for 2019 and is therefore looking to extend more into next year.

(f) Jersey's Big Weekend – The Board noted that an event will be held on 27th March 2020 fronted by VJ and the Jersey Hospitality Association (JHA) at which residents will be given the opportunity to enjoy the benefits of what tourism suppliers are able to offer. TC advised that the Big Weekend has been based on a model used in other jurisdictions and noted that despite initial reservations from some members of the Jersey Attractions Group (JAG) all members have now bought into the initiative. He noted that the event will highlight that the Island is open for the season and advised that some attractions have brought forward their opening date as a result.

(g) Team Jersey Staff Pass – KB advised that the Team Jersey Staff pass was a new

initiative which has been developed as a way to ensure front of house staff engage with the attractions. He explained that 380 passes have been distributed to (mainly hotel) staff throughout the Island and noted that very positive feedback has been received to date. PB noted that the Pass was discussed at a recent Luxury Jersey Hotels meeting and all properties have signed up to it. TC suggested that the Pass could also be extended to bus and taxi drivers.

(h) Events Jersey – IT WAS NOTED that Events Jersey recently hosted a visit around Jersey's suitability as a MICE destination and KB advised that Hills Balfour are working on leads from this.

(i) Marketing – KB reminded the Board that VJ have adopted a longer approach around campaigns which enables management to better plan and use assets more efficiently and he accepted that VJ must ensure it is creative and builds on this process.

(j) IT – The Board noted that the results of an IT assessment undertaken on VJ in April 2019 have now been received. KB reported that he has a meeting the following day, Thursday 24th May 2019, to discuss the findings of the report with Prosperity 24/7 and confirmed that he will work with them going forward in this regard.

There being no further comments on KB's CEO Report, KK asked whether KB had any significant concerns for 2019. KB responded that he was concerned about Jersey's ability to remain competitive in a global economy and suggested that a large part of this related to product. He explained that value for money is something that is consistently mentioned by visitors and whilst the position in this regard is not dire, it is Jersey's least positive metric and he therefore stressed the importance of considering it in the long term.

MG noted that his main worry was the ongoing uncertainty around the forthcoming season, noting that this applies to hotels, airlines and Condor. However, KB advised that most jurisdictions were in the same position.

6. STAKEHOLDER BREAKFAST CONSULTATIONS – The Board reviewed a paper circulated with the agenda outlining the arrangements for the stakeholder breakfast consultations. **IT WAS NOTED** that these will take place between 24th and 28th June 2019: four at Samphire in Jersey and one in London and the results from the same will be fed back at the away day on 17th July 2019. The arrangements were approved by the Board and KB confirmed that the Board were welcome to attend if they were free.

IT WAS NOTED that following the recent success of Chamber's Retail Summit, they were looking to hold a tourism summit in the autumn.

7. AWAY DAY – The Board reviewed a paper circulated with the agenda outlining the proposed format for the forthcoming away day. It was agreed that a facilitator was essential and **IT WAS THEREFORE RESOLVED** that KB would contact Andrew Jackson (AJ) accordingly. The Board approved the proposed format for the away day and **IT WAS RESOLVED** that KB would work with AJ to finalise the same. **Action: KB**

KB drew the Board's attention to the additional aspect of the away day that he has proposed whereby Directors are paired together in advance to prepare input for the meeting on the themes listed and this proposal was welcomed by the Board. CL noted that SB was unable to attend the away day and proposed that Rhys Powell be invited in her place. **IT WAS THEREFORE RESOLVED** that KB would contact him accordingly. **Action: KB**

TC stressed the importance of the Board being provided with the results of the stakeholder breakfast consultations in advance of the away day to ensure that focus can be placed on VJ and marketing rather than the corporate governance of the organisation.

AM advised that whilst the away day was already in his diary and he was happy to attend, Matt Thomas, the new CEO of POJ was due to start on 15th July 2019. He therefore queried whether he should also invite MT to attend, noting that it would provide an opportunity for him to get to



know the Board. The Board agreed that both AM and MT should attend the away day and **IT WAS THEREFORE RESOLVED** that AM would invite MT. **Action: AM**

PB noted that the Board packs include a significant amount of information and he stressed the importance of focusing on the vision and successful future of Jersey. He referred to the Oxford Economics Report, circulated with the previous Board pack and queried whether it was proposed to consider this in more detail. KB noted that it was agreed to release the executive summary to the Oxford Economics Report as this provides key headlines from the report. However, whilst this was welcomed by PB, he suggested that consideration be given to using some of the report to aid discussion at the away day.

The venue for the away day was briefly discussed and **IT WAS RESOLVED** that KB would make the necessary arrangements in this regard. **Action: KB**

IT WAS NOTED that a Board meeting would take place following the away day at 4pm.

8. MINUTES OF THE PREVIOUS MEETINGS – IT WAS NOTED that the A and B Minutes of the previous meeting held on 24th April 2019 had been circulated with the agenda and **IT WAS RESOLVED** to approve the same subject to minor amendment.

9. MATTERS ARISING

The Board noted the actions log, a copy of which had been circulated with the agenda and KB confirmed that all actions were either complete, pending or on-going.

10. RISK REGISTER – The Board noted the Risk Register, a copy of which had been circulated with the agenda and KB advised that the risk in relation to route disruption had been reduced in likelihood following agreement with easyJet around their ongoing flight schedule.

11. 2019 FORWARD BOARD MEETINGS CALENDAR – The Board noted the 2019 Forward Board Meetings Calendar, a copy of which was circulated with the agenda.

12. AOB

(a) **CICRA/POJ -** AM provided an update regarding CICRA's consultation on POJ and **IT WAS NOTED** that this was due to complete on 24th May 2019. Thereafter there would be a period of 28 days in which to finalise the position and, if approved, POJ propose implementing fee increases with effect from 1st January 2020 which would enable the development of the Airport to be progressed. However, he reassured the Board that this would be phased to ensure minimal disruption to customers.

(b) **Planning Application - IT WAS NOTED** that MG was due to launch details of a Planning application to develop 60 self-catering units in addition to the existing 68 already at Les Ormes.

(c) **Population Office -** MG expressed concern that Les Ormes was recently refused additional licences for extra posts because they are considered "low value". DS explained that the Population Office's default position is to refuse all additional licence applications with a view to applicants lodging an appeal which are heard by Ministers and MG noted that his appeal hearing with Ministers is scheduled for 13th June 2019.

(d) **SW –** KK thanked SW for her contribution to the VJ Board and the Tourism Shadow Board during her seven and a half year tenure as a Director and presented her with a gift on behalf of the Board. SW thanked the Board and agreed to offer her assistance on an ad hoc basis if required going forward.

13. DATE OF NEXT MEETING – IT WAS NOTED that the next Board meeting was scheduled for 4pm on Wednesday 17th July 2019, following the away day.

There being no further matters to discuss, the meeting was closed at 11.40am.

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