

- Matt Thomas (“**MT**”) provided an update on connectivity. He said he was delighted with how the testing regime has gone so far thanks to the efforts of a wide range of parties. He said there were just under 10,000 arriving passengers over the first 3 weeks across the airport and harbour since the borders have opened. He said there had not been any significant issues with the testing regime and the core process for arrivals has worked really well, but the challenges on the testing side had been more on the ad hoc arrivals on private boats.
- MT said there was an Emergency Council meeting yesterday and that for the foreseeable future, we will continue with 100% testing regime. He said they were seeing growth in connectivity with easyJet (“**EJ**”) and BA and that the airlines are doing what they said they would do i.e. load factors started at roughly 40%, even though 100% of tickets were sold, meaning there is a high ‘no-show’ rate and that this seems to be normal across Europe. MT noted that the no-show rates are now starting to drop and load factors are up to about 60%. Under normal circumstances, EJ load factors are around 85% - 90%, so they are still down significantly compared to last year but are trading slightly ahead of the UK.
- MT noted that new EJ routes are starting to Manchester and Luton and Newcastle started yesterday. He said load factors on regional routes are high and that this mirrors the feedback from airlines that there is not much demand for city breaks at the moment.
- He said it’s great news for Jersey that the Government are supporting Blue Islands and that they are now ramping up their operations and will progressively do so throughout August. MT noted that demand on the ferry side is stronger compared to last year than they’re seeing at the airport, although he expects this to reverse at the end of August.
- MT noted that there were just under 10,000 arrivals across the airport and harbour since 3 July and from the week commencing 3 August there will be 10,000 arriving seats every week and that this will ramp up again at the end of August. He said the airlines report that bookings for August are not bad compared to the capacity on sale, although they are currently concerned about September. He said there is latent demand during school holidays and for the VFR market through August, but they are not sure what September will look like. EJ are taking bookings for summer 2021 and they say this has got off to a very good start. MT said that growth in connectivity is happening but that he did not want to draw too many conclusions about how long this may last.
- Robert Mackenzie (“**RMac**”) congratulated MT and the team on the testing regime noting that he had not received any negative feedback from clients about this. He noted that he had a client who was due to fly with EJ on 23 August and their flight has now been cancelled which must have happened in the last few days. He noted that short-term decisions by airlines around cancellations may cause issues for tour operators and for hotels who have cancellation terms in place if a guest does not arrive.
- MT noted that what is on sale on the EJ website for September is directional at best and EJ have not confirmed their network plan for September yet as things are just too uncertain at the moment. He suggested asking EJ for more information about why the flight has been cancelled noting that there were other examples of people being notified about their flight being cancelled, when the flight is still for sale on the website, noting that there could be some human error involved too.
- MT asked the group to let him know about any other short-term cancellations and the Ports will then follow-up with EJ. **ACTION – Group to communicate this to MT.**
- Jim Hopley (“**JH**”) also congratulated the team on the testing regime. He asked if there was any indication on how many arriving passengers were visitors or residents.
- MT had this data was not available currently but hoped this would be available soon. He said that by observation, the VFR market is quite robust (inbound and outbound) and that there is some tourism and very little business travel. He expects to start getting this data back in August once there is data for the full month of July.
- KB noted that Visit Jersey (“**VJ**”) had made contact with the relevant Government authorities to ask if a question can be included in the pre-departure questionnaire to establish whether passengers are Jersey residents, visitors, seasonal workers or in transit.
- Louise Ashworth (“**LA**”) noted that VJ are also working with Condor on a passenger survey which will be distributed in mid-late August which will enable VJ to gain some sentiment insights around how visitors found the holiday experience in Jersey which can hopefully be used for PR activity.

- Paul Talbot noted that some Manche Iles sailings had come last week but they had cancelled sailings this week and queried if there was any feedback from Manche Iles about this.
 - MT noted that the issues with Manche Iles are very much on the French end rather than the Jersey end. He said there is a significant amount of public money that subsidises that service and together with local politics around upcoming elections and the increasing spread of COVID-19 in Brittany, the prospects don't look good beyond this weekend and although this has not been formally confirmed, Manche Iles may pull the service for the rest of this summer. MT noted that some Ministers are actively involved in trying to talk them around.
 - Jennie Smith (“**JS**”) queried whether the testing process on the Condor Clipper was different. MT noted that this was similar to the testing regime for private aircraft/sea arrivals but as bookings are increasing, Condor are planning to use the Clipper for passenger traffic so will be implementing the same testing regime as the other ferries.
 - KB asked the group to provide feedback about their thoughts on prospects for the rest of the summer season.
 - Graeme Smith (“**GS**”) noted that Jersey Business are starting to see an increase in businesses in stress across multiple sectors. He said revenues are down and there are some issues in terms of deferred rent. GS noted that businesses are trading below break-even levels and while there have been less business failures than he thought, this position is starting to change and this highlights the criticality of the future Government fiscal support which is more important than ever. He said he had not yet heard about the next steps for the payroll co-funding, but that he understands this should go through until December for general sectors with a further extension for the hospitality sector.
 - Patrick Burke (“**PB**”) noted that they were only given 1 days notice before the airport opened. He said there has been more business over the last few weeks but a lot of this is the local market and the staycation campaign has been a benefit, but it is very weekend-centric, although they were slowly seeing an increase in the number of visitors. PB noted that from a Luxury Hotels Group perspective, it is the hotels that are out of town that have made the stronger start as there is very little corporate business currently, and the hotels with high numbers of repeat guests are also probably doing better and that people who know and love Jersey are returning.
 - PB noted that as a group, we now need to focus on really amplifying the message that Jersey is open for business, and that it is safe with procedures in place and he was interested to hear from the VJ team on the marketing activity update. He noted that the situation is very fragile, but that bookings are currently running at near to normal levels for August which looks strong, although September isn't there yet, but this may pick up closer to the time as people are booking later.
 - David Seymour (“**DS**”) noted that some of the August period is picking up. He also agreed that the out of town properties are getting local weekend staycation business and will have proper visitors again in August, but that September, October and November already look quite spiky. DS noted that a big problem for hotels that are dependent on corporate business in winter is that many businesses aren't going back into work until January. He noted that the fact the EJ have not yet confirmed their September availability yet and are not looking to October or November yet means there are more tough times ahead.
 - Andrew Shrimpton (“**AS**”) noted that business coming in is good but there are also lots of cancellations, so the net effect is not really moving. He said August looks OK but September is still unknown. He noted that feedback from customers is that they have concerns about what will happen if they test positive on arrival, especially for those travelling with families and some people are cancelling due to these concerns. AS said the German market and the groups market are both gone for the rest of this season and it is concerning that EJ have not yet confirmed September and are still cancelling flights.
 - JS noted Government have asked VJ to work together with Public Health, Environmental Health and the JHA to scenario plan for different types of situations that may arise that we do not currently have processes in place for. She noted that one of the challenges is that industry need to be able to answer these questions but at the same time, we don't want to go out to consumers with a huge FAQ document which covers every scenario but then becomes a barrier to booking and that there is a delicate balance on how we do this. JS said hopefully Government will take over the FAQ and this will be a Government document and VJ and the JHA will act as a conduit for queries.
- ACTION – Group to send any queries to Jennie or Simon.**

- Christopher Peach (“CP”) noted that they had been approached about being a ‘sanctuary hotel’ for visitors who test positive on arrival, but that due to GDPR restrictions, the Government were not prepared to tell them whether guests are infected or not. He said that this made no sense to him at all and asked if Simon Soar had any update on this.
- Simon Soar noted that they are actively pushing back on this right now – he said that currently if one of your guests tests positive, unless they have signed something to say they will share their results with you, you will be contacted by the Track and Trace team to tell you a guest has tested positive but they can’t release the name without the guest’s permission which is ludicrous in the middle of a pandemic. He noted that there could be huge reputational damage if there is an outbreak in a hotel. He said he is currently pushing for the sign-off on the testing form to be updated to confirm that if someone tests positive, the accommodation provider will be informed.
- CP noted that they were receiving feedback from guests about the price of getting to Jersey, at £300 return with Condor and Blue Islands have now increased all their prices so it’s nearly £300 to get from Southampton to Jersey and this is restricting the location. CP further noted that September is looking OK but that they are receiving a lot of enquires about Super League Triathlon and the Air Show and asked if there was an update on these events.
- Meryl Laisney (“ML”) noted that VJ have been working with Public Health on formalising recommendations on what events guidelines would look like and that a paper was being submitted to the Council of Ministers today about events guidelines and that there should be an update tomorrow about how the events sector can move forward. ML noted that even though the decision about whether SLT would go ahead was supposed to be made on Monday, they are still holding out for the events guidelines before they make a decision, and if it does go ahead, the event will look very different, and that hopefully we would know more tomorrow.
- MT noted that the feedback they are getting from event organisers is that it’s highly unlikely that the air show will go ahead in any way like we are used to
- Dominic Jones (“DJ”) said they are seeing similar things to the hotel sector with the restaurant and pub market. People are trading at around 30% revenues and revenues are loaded at 2/3 at the weekend and 1/3 during the week which creates great operational challenges for restaurants in terms of overheads and staff. He noted a further challenge is the uncertainty of the future of the co-funded payroll and the risk of further lockdown and restrictions and lack of consumer confidence. He said they have decided to open up cafes in the next few weeks and restaurants on a staggered basis although it is likely that St. Brelades will not re-open again until Easter next year. He said they have undertaken a lot of financial analysis which has been examined by forensic accountants and there is definitely a lot of risk for restaurants going into this winter. He said the approach to the co-funded payroll had been almost negligent by Government, and the problem is that business owners are being looked at to support employment, with weaker businesses being supported 100% and stronger businesses by 80%. He said the industry needs continued investment and realistically, we need to be strong this time next year to open up and make the best of it. He said this needs to be looked at more forensically.
- Stef Stevens (“SS”) noted that they were now fully booked but due to coronavirus, they had to cancel 4 and a half months of trips and now cram everything into the next 1 and a half months, so they are very busy, but that they are still getting new bookings coming in. Stef queried if there was any update on the Guernsey border and KB, MT and RMac confirmed that Guernsey’s borders will not open again until September at the earliest. SS said they are also receiving lots of queries about whether Jersey is open and also SS also noted that they are not allowing people onto the RIBs until they have received a negative result but queried if this was actually a requirement.
- MT suggested that SS contact Bill Saddler at the Ports and he will raise this with the relevant Government counterparts.
- Kristina Le Feuvre (“KLeF”) noted that her business is not allowing anyone in unless they have had a negative result. She noted that they have been working with the inspectorate and have opened the inside area this week and although it hasn’t been that busy, subconsciously people feel they’re getting better value for money. KLeF noted that for most of the month they had been 70% down on visitors numbers and usually 65% of their visitors are tourists at this time of year, so the lack of tourists is a big issue and the payroll system is critical for them at the moment as they are just about breaking even at the moment. She said they are taking things a month at a time but that September will be loss making month and she is very eager to see what the Government will do through the winter as she doesn’t think any attractions will make any money this year as most are currently running at about 30% of usual revenues.

- Debbie Goffin (“**DG**”) noted that at the moment, 30% is where she would expect things to be. She said any type of forecasting is incredibly difficult and although they are starting to get new bookings coming in, they don't know if those bookings will come and they are starting to see some cancellations due to testing and uncertainty around what will happen if they test positive. DG noted that Condor are currently only operating 3 days a week and if a booking is for a day when they are not operating, the customer is entitled to a full refund. She said there is so much uncertainty that they are taking things one week at a time. DG said she would like to see Condor increase capacity because they are struggling for sea capacity for late bookings and the uncertainty around the flights is also a concern.
- KB asked DG how Jersey bookings and activity compared to other destinations where there are no testing on arrival requirements. DG said it is easier where borders are open and their sister company Premier Travel is taking bookings for Spain Greece and Croatia where borders are open and although these are not normal levels, there is an increase in bookings.
- Sarah Barton (“**SB**”) said she had spoken to BA Holidays who had launched their flash sale which was due to end today, which promoted destinations without access restrictions for UK passengers. Although Jersey was not included in the promoted destinations, initially Jersey experienced a 'halo effect' with a boost in sales but then this dropped back down. SB noted that even for destinations without access restrictions, it is still a tough market. SB noted that VJ are talking to BA about a joint campaign which is likely to commence in August and in to September and BA are looking for strong price points.
- RMac noted that there were 3 issues that visitors had to consider. Firstly, the fact that they have to be tested is putting them off, secondly the prospect of a 14-day quarantine if they test positive and concerns about where they will stay and how this will be paid for and how they will get home, and thirdly, the lack of certainty over flights, where people book a flight and then it's cancelled a week later, noting that this is very frustrating. RMac said he hoped this would settle down in August but expected that September would probably be very challenging. RMac said they are seeing an increase in business but cancellations are an issue, which are partly driven by airline schedules and frequency and partly because people don't want to come.
- Louise Ashworth (“**LA**”) provided an update on Visit Jersey's marketing activity noting that this was mainly tactical activity to drive bookings for August and September. She said VJ were looking at data on a daily basis to see what is performing and that activity is very targeted on departure points. LA further noted that VJ are looking at Autumn and the potential to extend the season and give consumers confidence that there will still be things to do, noting that the feedback from airlines is that new bookings are reducing to a 1 or 2 week lead time.
- LA further noted that they are also looking at 2021 and how to ensure we get off to best start next year. VJ are also looking at other areas of consumer needs; awareness that Jersey is open, assurance that when they come here they will be safe and ensuring that the holiday experience itself is not 'sanitised'.
- LA noted that on the awareness point, the re-opening edit had been launched a few weeks ago and that 1.5 million people on Instagram were reached with this over the first weekend with an excellent engagement rate. She further noted that a press release had been launched to UK media to communicate that Jersey is open which was picked up by 26 core publications. She said that on the assurance point, this is around health & safety and what the experience will be and what visitors can expect and that VJ will be pushing out infographics on their social channels soon to communicate what consumers can expect.
- LA noted that VJ had promoted a price-led offer by Condor and although people were engaged there were few conversions and so they replaced this with the Condor safety video, as consumers want to know that we're open and what safety procedures are in place and then we will follow with the booking options. She noted they were working with the airlines too and that she would be reaching out to accommodation providers too to communicate their safety protocols first before going in with the offers.
- LA further noted that messaging needs to communicate that the holiday experience itself isn't sanitised and VJ will be filming a new edit next week featuring a family having a great time in Jersey and that she may be in touch with some of the group to film some of the scenes at their hotels/attractions etc.
- She noted that they have completely redeveloped the always-on content which is now much more targeted on departure points and focused on driving conversions for the airlines, ferries and hotels. LA noted that VJ had committed funds to a reactivation campaign with BA starting in early August. VJ have also allocated funds to working

with EJ and hope to get these channels activated next week and there is also co-funded activity with Blue Islands starting in mid-August .

- She noted there was also some fun content coming out at the end of this week around Jersey's re-opening. LA further noted that she was working on a concept which evolved the 'find your freedom' messaging, around 'doing your own dance' with different demographics dancing at iconic locations around the island and thinking about how we can make this interactive for visitors and run a competition.
- LA noted that when visitors arrive, there will be a new 'What's On' guide which will be ready at the end of the month so visitors will know what they can do when they arrive.
- Simon Soar noted that the Visit Safe scheme now has ministerial approval, the logo is finalised, VJ are working on the toolkits and Andrew Jones will co-ordinate the signing-off process with a dedicated page on gov.je for businesses to log-in and download the checklist, which will enable them to keep a register of businesses who have signed up. He further noted that they are finalising the audit process and that around 10% of those signed up will be spot-checked to ensure they are adhering. He said they are also covering off the complaints process. He further noted that there will also be a retail checklist and that the transport checklist is being finalised too.
- JS noted that in the industry toolkit there would be assets for businesses to use, such as the logo and assets to use through social channels and banners and that these should be user friendly to push this message out and build consumer confidence. JS noted that VJ and the JHA will both send out a dedicated e-news to launch this initiative with instructions and information, probably towards the end of next week.
- ML noted that there will be an update tomorrow in relation to clarity on event guidelines. In terms of attractions, ML noted that Senator Lyndon Farnham is keen to look at what support is necessary for the attractions sector and that they have facilitated a small working group who met earlier this week and pulled together lots of examples of business support from across the globe. ML said they are looking to put a proposal together over the coming week for consideration by Lyndon in addition to the payroll scheme.
- ML further noted that VJ are looking at how we can frame our strong physically distanced product in an inspirational way which will feed into the campaign mentioned by LA, possibly including our 'slow travel' product, self-guided trails from the Strava routes and new Geotourist Liberation 75 product. ML noted that the What's On Guide would hero these physically distanced experiences and will also promote the Visit Safe charter.
- David Seymour noted that on Saturday evening in St. Helier there was no physical distancing nor any visible police presence (neither Honourary or States police), which was very disappointing given the huge amount of effort that everyone else is trying to put into this initiative to create a 'Visit Safe' island. He noted that if any visitors had seen this, they would probably think Jersey should be in the same category as Leicester.
- SB noted that the most recent update from the German market is that SR travel (one of the groups partners) have cancelled all tours up to 31 August, due to the lack of clarity on Government advice about group travel. SB noted they are still receiving group enquiries for coach travel but that this is all about next year. She further noted that, largely due to Guernsey borders being closed, Sunair have also cancelled the rest of the season, but they have re-booked customers for next year. SB noted that this year for Germany, this will be about the FIT market (free independent traveller) which will be a much smaller volume of visitors.
- SB further noted that in the last meeting she had shared some OTA data and said she would follow-up on Stef's query about average length of stay. She said that in the last 4 weeks, most bookings for Jersey were 4-night stays and the average length of stay based on searches is 4.36 nights. 40% of searches were for lead times of less than 60 days and 39% were searching for travel in 90 days, indicating that people are searching for travel in summer and autumn. SB also noted that BA said the main demographic travelling on their flights at the moment were GenX (38 – 56) at 41%.
- RMac queried whether we have any idea on when we can expect to hear the Government plan for supporting the hospitality and tourism sector through the winter in terms of the payroll co-funding scheme.
- GS said he didn't have any definitive knowledge on this but that he broadly understands that they are looking at extending the scheme until the end of December across all sectors, but that the hospitality sector and particularly hotels may need this through to March. GS noted that there is an understanding that the payroll has been critical for this industry and in terms of planning, due to the '3 winters' scenario, this needs to be extended and that there is a real need for definitive answers on this.

- RMac agreed that a clear idea of timescales for the issuing of the support is required as this is critical for planning and the uncertainty is a real issue. **ACTION – GS to follow up with Dan Housego on this.**
- KLeF noted that although the Channel Islands active cases had been updated on the worldometer website, they needed to be updated again. **ACTION - RP to follow up on this.**
- JH noted that he would pass on DS's comments to one of the senior officers at the Police. He also asked for an update on the staycation campaign.
- LA noted that the staycation campaign launched about 4 weeks ago and it received coverage across all local channels and the hub on Jersey.com averaged approximately 10,000 views from locals over the campaign period. She noted that social activity reached about 52% of islanders via social activity so there was quite a lot of engagement and noted that the campaign would continue to run throughout the summer.

DRAFT

Attendees

Apologies

- Lyndon Farnham
- Dan Houseago

Organisation/sector	
Government of Jersey	Lyndon Farnham (Unable to attend) Dan Houseago (Unable to attend)
Ports of Jersey	Matt Thomas
JHA	Simon Soar
Accommodation	Patrick Burke David Seymour Christopher Peach Andrew Shrimpton
JAG (Activities)	Stef Stevens Paul Talbot
Heritage & Attractions	Kristina Le Feuvre Jon Carter
Jersey Business	Graeme Smith
Community Action Group / Environment Committee / Genuine Jersey / National Park	Jim Hopley
Retail & Restaurants	Dominic Jones
Tour Operator	Robert Mackenzie Debbie Goffin
Visit Jersey	Keith Beecham (Chair) Louise Ashworth Meryl Laisney Sarah Barton Ruth Perchard Jennie Smith