

Minutes of a meeting of Visit Jersey Limited ("VJ")
Held at Visit Jersey, Commercial House, Commercial Street, St Helier, Jersey, on
Wednesday 17th October 2018 at 9.30am

Present:	Kevin Keen (KK) – Chair
Doug Bannister (DB)	Keith Beecham (KB)
Patrick Burke (PB)	Tim Crowley (TC)
Mike Graham (MG)	Catherine Leech (CL)
Sam Watts (SW)	Amanda Wilmott (AW)
(collectively referred to as the "Board" or the "Directors")	
In Attendance	
Louise Ashworth (LA), VJ (for items 8 to 11 only)	
David Edwards (DE), VJ (from items 8 to 11 only)	
Aimee Maskell, AM to PM Secretarial Services (Scribe)	
Darren Scott (DS), Economic Development Tourism Sport and Culture (EDTSC) (Observer)	

1. **APOLOGIES** –No apologies were noted.
2. **CONFLICTS OF INTEREST** – The Directors submitted revised conflicts of interests forms together with updated due diligence documentation which KB arranged for Marc Couriard to certify. No conflicts were declared in relation to any of the items on the agenda.
3. **MINUTES OF PREVIOUS MEETING** – The Board reviewed the previous minutes dated 19th September 2018, a copy of which were circulated with the agenda and **IT WAS RESOLVED** to approve the same, subject to some minor amendments.
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 outstanding actions were discussed:
 - (a) **Conflict of Interest Form for PB** – As noted in 2 above this had now been completed.
 - (b) **Meeting between David Edwards (DE) and Paul Holley (PH)** – **IT WAS NOTED** that a meeting between DE and PH, from the Ports of Jersey (POJ) had not yet been arranged.
 - (c) **Forecasts** – KK suggested that agreement needs to be reached on how the Minister receives an update on VJ's forecasts now that August's results are known.
 - (d) **DB's position** – **IT WAS RESOLVED** that KB would amend the action list to reflect the amendment made to the previous minutes regarding the appointment of his replacement.
Action: KB
 - (e) **PAG October Meeting** – TC noted that he had still not received an invite to the PAG meeting scheduled for October and **IT WAS THEREFORE RESOLVED** that KB would establish the position in this regard, noting that he believed it had already been circulated. **Action: KB.**
5. **Q3 FINANCIAL REPORT** – The Board reviewed the 2018 Q3 Financial Report dated 11th October, a copy of which was circulated with the agenda. **IT WAS NOTED** that the Audit Committee reviewed this in detail at their meeting the previous day and a copy of the same had also been sent to EDTSC.

The Board noted that whilst there were some variances against budget during the quarter, particularly in respect of campaign creation and media buy, these had improved compared to Q2 and KB reassured the Board that he expected this to be within budget by the year end.

KB reported that some of KPI current and expected outcomes are "marginally under" and he proposed discussing these in further detail during the course of the meeting. KK welcomed the inclusion of a "heads up" in the Report regarding any KPIs that may not be met, and reference to targets for which VJ is accountable.

Referring specifically to the VJ target of "marketing: ROI on grant" VJ confirmed that the target of 5:1 would be met by year end. CL noted that the report referred to this figure being "available September". However, whilst KB confirmed that the number was looking positive at this stage, it was still only supported by a thin amount of data and that evaluation of 2018 activities would be ongoing until early 2019. **IT WAS THEREFORE RESOLVED** that he would amend the report to state "interim report available October". **Action: KB**

CL queried why visitor nights were not included in the visitor economy forecast targets when this was a key metric, particularly for the accommodation sector. MG responded that this was not a critical measurement, noting that accommodation providers charge virtually the same price for a five night stay as they would for seven night stay. However, CL suggested that it was important for marketing purposes and KB confirmed that whilst data in this regard was available, it was not reported on to EDTSC, noting that the metrics included in the report were the metrics it was agreed to report to them on.

CL suggested that a target percentage of 66% for "on-Island Supplier Partner Satisfaction was not high enough and proposed increasing it to 80%. KB explained that this figure arises from the previous year's results (plus 4-5%) and KK added that 66% was what was agreed for this year, albeit he accepted VJ could aim for a higher target next year.

MG referred to the target of 52% for first time holiday visitors and stressed that both new and return visitors were important. However, KK reminded the Board that it was agreed to record the number of first-time visitors last year and he stressed the importance of attracting them. DB noted the current outcome of 50% in this regard and the Board agreed that this was very high.

DS advised that VJ have an opportunity to review Schedule 2 of their Partnership Agreement with EDTSC. However, KB noted that he has already submitted VJ's Business Plan with KPIs. He therefore queried how he should take negotiations forward in this respect given that KPIs have already been tabled and DS suggested that KB resubmit them to him as he will be taking on responsibility for VJ's accounting processes in the short term due to VJ's accounting officer being on sick leave. **IT WAS THEREFORE RESOLVED** that KB would review and if appropriate re-submit VJ's KPIs to DS next week. **Action: KB.**

6. STAKEHOLDER COMMUNICATIONS PLANNING –KB summarised his memo dated 11th October 2018 (a copy of which had been circulated with the agenda) on Stakeholder Communications Planning. He noted that the Senior Management Team (SMT) have always taken an ad hoc approach to communications, albeit they have always responded when approached. However, whilst they are prepared to deal with some subjects (e.g. transportation issues), they are not on the front foot with others. Therefore, as agreed at the Away Day in July, a more structured approach will be adopted with a view to better getting the visitor economy message across.

KB reported that LA has assisted in sketching out the approach, details of which are set out in KB's memo, and he welcomed the Board's views on the same. CL stressed the importance of the Chair having a role and that this should be incorporated into a plan whereby he can act as a spokesman for industry/tourism in a more general sense. KK confirmed that he was comfortable to do this if helpful and **IT WAS RESOLVED** that KB would highlight some key topics on which KK could lead (e.g. government) as part of the planning process. **Action: KB.**

KK stressed the importance of VJ not becoming an outright lobbying group, noting that this should be the role of the Jersey Hospitality Association (JHA). However, he suggested trying to communicate that the benefit of the visitor economy goes beyond hotels. He noted that this was particularly relevant with government, who appear to be more positive about tourism when talking directly with the industry but continue to use phrases such as "low value" "low skilled" when referring to tourism generally.

KB noted that one of the four objectives of the organisation is for VJ to become a “trusted advisor” and he stressed that this was different to JHA who act in a lobbying role (and to whom VJ provide relevant information to enable them to do this). The role of “trusted advisor” was welcomed by DB who suggested that this was consistent with VJ transitioning towards becoming a Destination Leadership Organisation (DLO).

DB proposed that consideration needs to be given to the key messages that VJ wants to consistently resonate, noting that these should include positive and negative messages. He also proposed creating a stakeholder management “map” to establish what level of interest and influence stakeholders have in the key messages and how they can help communicate them. He suggested that whilst some stakeholders may have a low interest in a particular message, they may be able to influence it and therefore their involvement should still be considered (and vice versa). He added that when VJ is required to promote or react to a particular message it will be able to easily identify it that fits in with the stakeholders.

SW stressed the importance of defining the overall objective of creating a stakeholder communication plan (e.g. “winning hearts and minds so people vote for tourism”) and determining exactly why this is being done (e.g. to influence more people to come to Jersey), noting that the answers to these questions will identify who should do the communicating. However, she stressed that this will not be something that VJ can achieve on its own. Therefore, the involvement of key partners will be required and they will need appropriate information in order to provide support. She suggested reviewing internal resource and skill set with a view to outsourcing if necessary and referred to the States’ Comms Team as an example of somewhere from which VJ may be able to seek support.

SW acknowledged that a stakeholder communications plan was required, noting that it was a huge opportunity for VJ to build a “band of supporters”. However, she stressed the importance of VJ inspiring them sufficiently to vote in favour of tourism. AW expressed concern that involving too many people in the communications plan could lead to inconsistent messaging and highlighted the value in having simple clear messages. This was echoed by SW who encouraged promotion of VJ’s brand message. She stressed that whilst it must be made clear to the community that VJ need them to do this, they must also be provided with the relevant “toolkit”. Furthermore, and a sensitive approach must be taken as local people are already passionate about the Island.

MG expressed concern about diverting VJ’s marketing budget to support local people promoting Jersey and proposed that consideration be given to whether this would be better spent on an off-Island campaign instead. However, TC suggested that it was essential to have a communications plan. He acknowledged that VJ has deliberately focused its budget on external marketing until now and accepted that it may have lost some traction with the local community, including stakeholders) as a result, whereas the implementation of a communications plan would address that. He added that this was not a new initiative: it was a basic and essential part of the marketing remit.

PB expressed surprise that more local PR was not taking place, suggesting that this was vital and only required a small amount of budget. Furthermore, it was neither a political or a lobbying activity. He stressed the importance of VJ making a case for tourism to highlight the importance of the industry in the Island and he suggested that structured approach would do this.

Referring to budget, AW suggested that if KB was able to provide a figure associated with the communications plan this would further highlight its value. KK thanked the Board for their input and acknowledged that some further work was required around the plan to agree how much resource needs to be applied to it. **IT WAS THEREFORE RESOLVED** that KB would work up a plan and budget and share the same with the Board. **Action: KB**

KK sought an update from DS on the outline economic framework being developed by the States

and DS advised that this work remains ongoing.

Referring to the Stakeholder event scheduled for 11th December 2018, TC expressed concern that the agenda lacks any “wow factor” and proposed including a preview of next year’s campaign videos.

7. JERSEY DESTINATION PLAN (JDP) – KB summarised his paper on the proposed refresh of the JDP, a copy of which was circulated with the agenda. He reported that formal and informal consultation was about to start with stakeholders on and off Island on the JDP and advised that consideration needs to be given to what will increase growth and what will inhibit growth.

Referring to the current ambition for growth of 1m visitors by 2020, KB noted that in order to reach this an annual growth of 2.5% will be required. He suggested that whilst this was doable certain things will need to be done to achieve it. **IT WAS NOTED** that the current drivers for growth were (1) markets and segments; (2) image; (3) visitor experiences; and (4) Access and KB proposed that these remain the same. He suggested that the ambition was also appropriate and he proposed testing these with stakeholders on and off the Island during the consultation.

The Board’s view was sought on whether they were comfortable with the ambition for growth; the priorities for growth and goals to be tested on stakeholders and input was provided on the same.

TC noted the language used on page one of KB’s paper which refers to the 2020 ambition being predicated on government creating a policy framework conducive to long-term visitor economy growth and he proposed that this should not be listed ahead of VJ’s own responsibilities. However, DS suggested that the language used reflects reality, noting that if government creates policies that are not conducive to tourism growth, VJ/stakeholders will not be able to do anything.

This was echoed by KB who, by way of example, explained that in August Jersey hotels were over 93% capacity. He therefore suggested that there was limited value in promoting Jersey for this period as there is nowhere for visitors to stay, but of course we will continue to promote Jersey throughout the year. However, if the government were to make changes to policy, e.g. to enable camping on the Island this would allow further growth in visitor numbers during this period. Nevertheless, TC suggested that the current language appears to take the onus away from VJ and place it on government. This was supported by PB who stressed that if VJ wants to become DLO it needs to be able to lead independently and therefore VJ’s contribution should be the most important.

The Board acknowledged that KB’s paper was only for discussion purposes. However, KK proposed splitting the existing two bullet points into three with VJ listed first, albeit highlighting that the ambitions for growth could fail without delivery/support from industry and government.

Referring to the goals, whilst KK agreed that these did not need to be changed, he stressed the importance of highlighting that they will only be achieved if there is input from everyone and CL suggested that simple messaging was key, albeit that extra detail could be provided if required.

KK queried whether it would be possible to compare statistics from the year prior to VJ’s incorporation and now and KB advised that whilst this would be possible, it would need to be accepted that this would include two different data sets as data is now obtained from exit surveys whereas it used to be obtained from registration cards and focused on Staying Leisure Visitors and Staying Business Visitors in registered accommodation only.

KB stressed the importance of all stakeholders being aware of VJ’s ambition and everyone being inspired to move towards it. He added that he received strong support from Lyndon Farnham (LF) recently that he was interested in the money visitors spend rather than visitor numbers.

DB queried whether a gap analysis exercise has been undertaken to establish the current position in terms of the ambition with a view to determining ways in which to close the gap. He suggested

that consideration should only be given to changing the goals if it is not possible to close the gap. However, he suggested that initiatives could be developed which are tied to visitor numbers, which, when introduced would help close the gap and also possibly help meet other targets. **IT WAS THEREFORE RESOLVED** that KB would liaise with the VJ team with a view to identifying activities which could be undertaken to move the existing visitor number closer to the visitor number target of 1m by 2030. **Action: KB**

SW proposed that when VJ agree priorities for markets, consideration should be given to what all stakeholders can do to promote them. She used Ireland as an example and suggested that this not only required marketing by VJ but also input from stakeholders on product. DS advised that government input also needs to be borne in mind with a view to more coordinated approach being adopted (e.g. the Minister visiting a particular market with representatives from VJ, Digital Jersey (DJ) and Jersey Finance (JFL)).

KB acknowledged the benefit in undertaking a gap analysis. However, he noted that VJ were being asked to predict the next 12 years and expressed concern that when reference is made to something specific in a published document such as the JDP, VJ becomes tied to it and reduces any ability for flexibility. However, the Board agreed that gap analysis was an internal exercise that did not need to be published and that the stakeholders should become involved with the initiatives developed as a result of the analysis, not in the results.

KK noted that a consultation is due to take place with stakeholders with a view to VJ publishing an updated version of the JDP by 11th December 2018 to coincide with Stakeholder event which has been arranged. Therefore, KB was required to undertake a significant amount of work in a short amount of time. He acknowledged the importance of VJ engaging with stakeholders more regularly and accepted that the aspirations in the JDP required a refresh. However, whilst he welcomed the Board's comments, he stressed that the refreshed JDP should not become a larger document than the existing one.

This was echoed by SW who proposed that the JDP be restructured to enable readers of the same to "plug into" the different aspirations/ambitions. This was welcomed by KB. However, he stressed that there would not be sufficient time to put this into place by 11th December 2018 as that would require more of a granular level review and he was only proposing to undertake a strategic level review at this stage. **IT WAS THEREFORE RESOLVED** that the Board would email KB any further comments by 26th October 2018. Thereafter KB would reflect on the same and prepare a revised draft JDP for the Board's review prior to presenting to stakeholders. **Action: ALL**

KB also offered arranging one to one meetings with the Board in order to discuss and agree the position for the next ten years, noting that this was of significant importance. **Action: ALL**

LA and DE joined the meeting at 11am.

8. UPDATE FROM LOUISE ASHWORTH (LA) – LA provided the Board with a presentation reflecting on her first 30 days at VJ following which she invited any questions. CL welcomed the opportunity of VJ moving away from working in silos of trade, product and marketing and asked LA whether she saw an opportunity in these three areas working more closely together going forward. LA confirmed that she did and, by way of example, she noted that whilst Sarah Barton (SB) was working a lot with trade partners, she was also responsible for PR marketing as well. She described product and marketing joint working as "scratchy" in places and acknowledged that work was required in this regard and noted that a meeting was scheduled with the team on Monday to discuss how this can be improved.

DB welcomed LA's idea of giving the VJ brand more personality and also suggested meeting with her to obtain more detail about the psychology/language project she undertook with Sven Hughes from "Verbalisation" whilst at JFL.

AW suggested that risk taking was key, noting that most organisations are at their best when they take risks. She added that when VJ has done this, it has proved very successful (e.g. Kilted Yoga) and suggested that testing campaigns digitally first was the right thing to do. This was echoed by LA who stressed the importance of VJ feeling safe taking risks and not feeling afraid to fail as lessons can be learnt from failure. DB added that LA should use the Board to support risk taking decisions.

SW sought LA's views on VJ's brand narrative and whether she believes this is right. She referred to LA's comment in her presentation that a large proportion of imagery used in VJ's campaigns is similar to other destinations and suggested that consideration may need to be given to using a "brand plus" whereby Jersey is marketed as a place to go to to "feel revived", to "feel relaxed" etc., noting that this approach is the only way to really differentiate Jersey from other destinations. She acknowledged that whilst VJ's campaigns to date have been beautiful and very successful she suggested VJ will not reach its ambitions unless it is braver. She added that she was unsure that all agencies used by VJ are aware of its ambition and therefore just use the "island break" as their only strap line.

LA responded that she believes the brand narrative for VJ is right. However, she accepted that the execution of the same may require some work in some areas. She stressed the importance of bringing out the "sense of place" and "sense of fun" of Jersey in order to highlight its personality more. SW suggested that a more joined up approach with the product team will help reinforce a "sense of place" and PB queried whether better use could be made of the partnership programme to get more stakeholders involved. LA accepted that the partnership programme would improve stakeholder engagement. However, she advised that she required more time to better understand how the programme worked.

KB suggested that in order to ensure a more joined up approach with all partners, VJ's marketing needs to go through all channels. He acknowledged that VJ had earned the right to consider a bit more risk taking in campaign creation and development.

TC welcomed the timing of LA's appointment, noting that whilst it was necessary for VJ to focus on marketing in the last few years, with trade and product being relatively new departments, now was a good opportunity for KB, LA and the rest of the team to re-involve them and consider them as part of the overall theme rather than as individual departments.

There being no further questions for LA, the Board thanked for her presentation.

DS left the meeting at 11.35am.

9. AUGUST EXIT SURVEY RESULTS – The Board noted the August exit survey results, a summary of which had been circulated with the agenda and KB reported that an abbreviation of the same will be included in the VJ newsletter due to be circulated later today.

KB reported that the forecast for total visitors for the year was now forecasted to be flat and holiday visitors (where VJ's focus has been placed) will also likely be flat. KK queried whether Jersey has lost some market share during 2018 and DE advised that this is dependent on which jurisdiction Jersey is compared against, noting that the National Statistics Office have recently published negative figures for UK in-bound and outbound travel. He therefore suggested that whilst Jersey may not have lost market share from UK outbound travel, the Republic of Ireland are doing very well and it may therefore have lost some from there.

DE suggested that 2019 will be a very interesting year for travel due to Brexit. He noted that there were growing negative reports about whether planes will fly after 30th March 2019 and advised that Ryan Air and some German tour operators are not guaranteeing travel after this date. Therefore, some people may not plan or book travel. He expressed the hope that a deal will be reached between the UK and the EU in order to resolve these issues shortly. However, he suggested that travelers may choose to take their holiday within the UK rather than in Jersey,



noting that 72% of visitors fly to the Island. He added that visitors may also be deterred from travelling due to potential disruption.

LA proposed that VJ could try and mitigate risks around Brexit by developing campaign themes around it. However, she accepted that this cannot be started until a decision has been reached between the UK/EU. She acknowledged that additional budget would also be required for this and KB confirmed that a tactical request for additional budget to support a Brexit campaign has already been requested.

KK sought the Board's views on how the exit survey results for August should be communicated to the Minister and KB advised that these were briefly mentioned when he met with Lyndon Farnham (LF) recently to discuss the 2019 budget. In answer to a question from TC, he noted that despite a number of requests, approval of budget had not yet been received. KK highlighted that September was a good month for the Island and this was echoed by DB who reported that numbers were up at the airport and harbours in September.

MG reported that bookings for 2019 were already up on 2018, noting that Condor and EasyJet prices were currently very low for next year. He therefore proposed that this, together with the good summer the Island has just experienced, provided a good opportunity to promote Jersey suggested that Brexit should not be referred to. This was echoed by TC. However, DB proposed that reassurance that travel will still happen would be useful, particularly as he does not anticipate that anything will be any different post-Brexit.

10. ATTRACTIONS RESEARCH – DE provided the Board with a presentation on the results of research undertaken by The Distilleries on “holiday activity planning and decision making” following which a number of questions were raised. TC welcomed the information and suggested that whether visitors’ pre-book or not, the attractions ability to sell their product was key. He therefore proposed that focus must be placed on how attractions present themselves to potential visitors.

TC noted that promotion of the “Island Break” is reducing the average stay of visitors. Therefore, competition amongst the attractions has increased. However, he advised that the statistics in relation to the number of attractions a visitor was likely to visit was based on UK visitors and suggested that these would be different if based on the German market. Nevertheless, he stressed the importance of all stakeholders working together and, by way of example, he suggested that a “one stop” approach should be encouraged whereby visitors log onto their hotel’s website and see what activities are available nearby. He acknowledged that Jersey Pass was available previously but the Board agreed to withdraw this prior to DE and KB’s appointments.

DE mentioned that average length of stay is reducing across most mature Western Europe destinations. He stressed that careful consideration would need to be given what the Jersey Pass should include if a decision was made to bring it back. TC noted that although the Jersey Pass sold well when it received support from Jersey Tourism (who set it up initially), it cost approximately £20k pa to market it. KK suggested that it would be useful for DE to receive some background information on the Jersey Pass prior to his presentation of The Distilleries’ results to the Jersey Attractions Group (JAG). However, DE stressed that results do not recommend bringing back a Jersey Pass, albeit that if a decision was made in this regard, careful consideration must be given to how it is pitched. MG added that if reintroduced, the Jersey Pass should also include other activities such as bird watching, walking tours and bike hire.

KK suggested that attractions should ensure they provide visitors with the ability to book tickets online, noting that some still do not offer this service. TC reported that this has been discussed with Ticket 365 at a previous JAG meeting and consideration was given to establishing a platform as it was accepted that booking should be made easier for visitors. SW queried whether investment in online booking functionality was of value/critical for attractions, noting that it will not necessary encourage visitors to pre-book. She added that even in the height of the season,

queues are not an issue at most Jersey attractions and therefore pre-booking is not required. Furthermore, some visitors do not wish to pre-book as they prefer to assess the weather on the day before deciding what to do. For all of these reasons she suggested that it was not imperative for an attraction in Jersey to offer online booking.

SW sought further detail of the respondents to The Distilleries questionnaire: she asked whether the results were collated from the exit surveys or from people who were going on a similar type of holiday to Jersey. DE explained that the respondents had to be people who took two or three short holidays per year of three or more nights within the British Isles. He added that that out of the 700 people interviewed, 6% of them used Jersey as their example.

IT WAS NOTED that the survey was undertaken in May and therefore the results are broadly representative of what people do over the summer and the Board accepted that the results would be different if undertaken in winter.

The Board briefly reviewed Trip Advisor and expressed concern about the attraction categories, listings and imagery for Jersey. **IT WAS THEREFORE RESOLVED** to approach them to discuss the same and provide them with some improved imagery. **Action: KB/LA**

KB commented that print came out well in the survey. However, MG noted that the What's On booklet was very important for visitors with most of them picking one up on arrival. In answer to a question from KK, DE confirmed that 8/10 visitors undertake research prior to visiting their destination. On this basis, KK suggested that it was particularly important to ensure that Trip Advisor's listings were more accurate. DB added that if visitors can be encouraged to spend prior to arrival, it will result in increased spend when they are on Island which will, in turn, increase GVA.

CL advised that whilst she was not impressed with The Distilleries full report, the summary by DE made it much clearer and she congratulated him on a great piece of work. She asked whether the research was funded by JAG and how much it cost and DE advised that the cost was £40k and whilst JAG supported it, they did not fund it.

The Board agreed that the survey was both quantitative and qualitative and DE explained that the respondents were surveyed both pre and post-holiday as well as in real time (by completing diaries whilst they were away), noting that case studies were used together with real people's imagery and experiences.

TC stressed the importance of encouraging JAG to work together to promote the Island in order to benefit everyone rather than focusing on competing with each other. This was echoed by CL who suggested that in order for Jersey to benefit overall, JAG must take on board the results of the survey. With this in mind she proposed that DE use a destination which has best practices in place in respect of its attractions as an example when presenting the survey results. KB reported that VJ are working closely with Kent and consideration is being given to inviting some JAG/JHA members there to support the report with real learnings.

AW advised that whilst she has previously expressed concern at the cost of research, she believes this was appropriate. KB explained that research such as this provides VJ with the authority to present to audiences with its findings and suggested that the cost was reasonable for what has been achieved. KK added that the research will help develop product which, until now has been under resourced and TC suggested that if the research helps people with their decision making to visit Jersey it is of value.

SW noted that a review of the What's On booklet was taking place and the findings were awaited. However, she suggested that it would be useful to receive an update on this, noting that some attractions avoid promoting themselves "pre-arrival" on Island but may re-consider this instead of advertising in What's On going forward. KB advised that the What's On and Map contracts will expire at the end of 2019 and a mid-contract review was currently being undertaken.

DE advised that two pieces of research have been undertaken as part of the mid-contract review (which he would share with the Board). He noted that the first was similar to that undertaken in 2017 whereby approximately 250 visitors were interviewed face to face to establish what information they require when they arrive; what information they use when they are in Jersey; what influence the information had; and what questions are asked at the Tourism Information Centre (TIC).

IT WAS NOTED that the top three sources of information used are the Island Map, What's On and the Liberty Bus timetable. DE advised that visitors were also asked whether they did anything directly as a result of using these information sources and the results suggested the print items do have an influence.

The Board noted that the second piece of research included undertaking a stakeholder survey to obtain feedback from those who have already invested their marketing budgets in the map and What's On booklet. However, DE advised that the results of this survey are not yet known.

LA added that work is also on-going to update the "see and do" pages on the VJ website to further inspire people to come to the Island.

11. EUROPE CHARTER UPDATE 2018 AND PROSPECTS FOR 2019 – The Board reviewed SB's paper dated 10th October 2018 which provided an update on European charters for 2018 and prospects for 2019, a copy of which was circulated with the agenda. KB summarised the same although he highlighted that final picture was not yet available.

IT WAS NOTED that for the year to date direct German charter numbers are showing an increase compared to 2017 (5,654 versus 7,349). However, the number of visits by German residents are showing a decline (15,258 versus 14,223). Referring to 2019, KB advised that German charter seat capacity is forecast to be 10k compared to 13k in 2018 and he noted that the reasons for this are explained in his SB's paper.

IT WAS NOTED that VJ is working with Visit Guernsey regarding another routing of charter flights from Germany and KB noted that despite both Jersey and Guernsey underwriting charter routes in the past, it has very rarely been necessary to pay any money as their performance targets have been met.

The Board noted the update for 2018 on charters from The Netherlands, Switzerland and Austria, together with details of their prospects for 2019.

DE explained that VJ is required to work with tour operators in relation to the charter driven markets. However, putting this in to context, he noted that Air Lingus provides more capacity from Ireland than all the German charters.

AW sought an update on the Scandinavian market and KB advised that there has been very little tour operator encouragement to focus on this. Therefore, no approach has been made to the Scandinavian carriers. He explained that the Scandinavian tour operators are unable to secure attractive hotel rates in the summer months and, for the same reason, Globalis has taken the decision to only come to Jersey at the start and end of the summer, albeit that this was welcomed by VJ because it extends the Island's season.

DB reported that during a recent conversation with SAS, they would not wish to progress with charter flights to Jersey without the support of the tour operators. He explained that whilst their CRJ900 aircraft can land in Jersey, it is not an aircraft that they would want to deploy without a full load. He added that whilst they could "wet lease" an alternative aircraft, this would still require the support of the tour operators.

KB stressed that VJ were ready, willing and able to go into the Scandinavian market. However, he reiterated that the support of the tour operators was required. DB suggested that it was still worthwhile focusing on the Scandinavian market as high volumes have been received from there

in the past, particularly Norway. He added that Stockholm and Copenhagen are both very good "hub" airports to fly in and out of.

CL suggested that the 2019 forecasts for Germany are not very positive at the current time and, due to market forces, she queried whether consideration should be given to re-allocating some of the German marketing budget into Ireland instead. MG noted that considerable budget is always spent on Germany without significant success and agreed that more focus could be given to Ireland (and also Scotland) and he queried how much budget was currently spent on these markets. However, DE expressed concern that looking at data can sometimes mask the reality for different businesses. He accepted that more could be done with the Republic of Ireland, noting that whilst Air Lingus flies to Jersey six days a week in the summer, little marketing is done to ensure there are people on those flights. However, he suggested that marketing in Germany makes sense as it is the third most valuable outbound source market worldwide and Germans are known for spending and travelling a lot.

DE acknowledged that there were challenges with the aviation market but suggested that Jersey was better placed having a small number of routes it can support rather than too many it is unable to support. He therefore proposed continuing to focus on a small number of routes and when they are working well consider adding more.

CL welcomed a percentage breakdown of visitors using Air Lingus to travel to Jersey into leisure, business, tour operator, package etc. and DE confirmed that this could be obtained via the exit surveys. **Action: DE** However, KK stressed that VJ should not give up on the German market and this was echoed by the Board.

There being no further questions for DE, the Board thanked him for his presentations and he and LA left the meeting.

12 2019 BUSINESS PLAN – IT WAS NOTED that the 2019 Business Plan had been circulated with the agenda for the Board's information.

13. AUDIT COMMITTEE UPDATE – TC provided an update from the Audit Committee held the previous day, 17th October 2018. He reported that VJ will reach the year end on budget; Directors' GDPR training had been completed (save for AW and PB); and Directors due diligence had been submitted (as noted above). Referring to GDPR, **IT WAS NOTED** that as a result of recent staff changes a policy had been implemented whereby GDPR training must be completed within three months.

The Board noted that the Audit Committee reviewed the Risk Register, a copy of which had been circulated with the agenda, and minutes of the Audit Committee meetings would be uploaded to SharePoint for the Directors review.

IT WAS NOTED that a Director will be required to replace DB on the Audit Committee from the end of the year. **IT WAS THEREFORE RESOLVED** that TC would liaise with the Directors accordingly with a view to one of them joining the Committee. **Action: TC**

14. CEO REPORT – The Board noted KB's CEO Report, a copy of which was circulated with the agenda. **IT WAS RESOLVED** that KB would rename his report when saving in SharePoint going forward. **Action: KB**

DB referred to KB's reference to "Hospitality Black Economy" in his report and acknowledged that whilst VJ was not a lobbying organisation, it could undertake some work on the ongoing debates around labour, migration and productivity in the Island, noting that this was particularly important if VJ wishes to become a DLO. KB advised that some workshops have been organized by the States with Metro Dynamics one of which looked at productivity in the tourism economy. He noted that whilst he was only invited the night before, he attended and a discussion took place around the minimum and living wage issues and he took away from that meeting that implementation of the

latter is inevitable without consultation. In answer to a question from DB, KB advised that Metro Dynamics led the workshop on behalf of the government, albeit that Richard Hawsley was in attendance representing the States. He added that they have undertaken similar workshops with other sectors.

DB expressed concern about no consultation taking place regarding the living wage and suggested that the government will receive criticism for this. However, KB proposed that talent and workforce will inevitably be discussed as part of the JDP consultation. This was echoed by TC who noted that these issues are discussed at every IOD and Chamber event. He stressed the importance of being able to employ staff in order to operate a business and suggested that not being able to do so was a reputational risk for Jersey as a destination.

The Board noted the Trends Report, a copy of which was circulated with the agenda. KB highlighted the additional data attached to the same in relation to air connectivity and **IT WAS RESOLVED** that that the Board would discuss this in more detail at another meeting. **Action: ALL**

SW referred to Flybe's recent announcement regarding increased losses and, bearing in mind the amount of flights it provides to Jersey, she proposed adding this to the risk register. **IT WAS THEREFORE RESOLVED** that KB would update the risk register accordingly. **Action: KB**

15. RISK REGISTER – The Board noted the Risk Register, a copy of which had been circulated with the Board pack. Due to the importance of tourism and the Airport/Harbours working together, CL queried whether it should be formalised that the CEO of POJ should be a member of the Board. DB acknowledged that the relationship between VJ and POJ had never been better and **IT WAS RESOLVED** that KK and DB would discuss the matter in further detail outside of the meeting with a view to the interim POJ CEO attending meetings if he/she wishes. **Action: KK/DB**

MG expressed concern about the price of travel with Condor and stressed the importance of ensuring that air connectivity did not become the only source of access to the Island.

16. FORWARD BOARD MEETINGS CALENDAR – The Board noted the forward board meetings calendar, a copy of which had been circulated with the agenda.

17. AOB - DB reported that following a recent CICRA seminar which was held around price control, he had a discussion with a representative from BA. He suggested that it would be helpful to invite BA to re-present to the Board (noting that they previously presented to the Tourism Shadow Board on 20th November 2013) to provide an insight on how destinations work.

In answer to a question from KB, the Board confirmed that the SharePoint portal was now working.

It was suggested a representative from BA be invited to a future board meeting. **Action: KB**

18. DATE OF NEXT MEETING – **IT WAS NOTED** that the next meeting was scheduled for Wednesday 12th December 2018 at 9.30am at VJ's Office.

There being no further matters to discuss the meeting was closed at 1.35pm


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Chair

12 December 18

Actions:

1. KB to confirm when the PAG October meeting invite was sent and revert to TC accordingly
2. KB to amend the Q3 Financial Report to state "available October" in relation to the ROI on grant target

3. KB to re-submit VJ's KPIs to DS with a view to re-visiting Schedule 2 of the Partnership Agreement
4. KB to highlight a number of key topics in the communications plan on which KK can lead (as Chair)
5. KB to calculate and share a proposed budget for implementing the stakeholders' communication plan
6. KB/VJ to conduct a gap analysis and identify activities which could be undertaken to move the existing visitor number closer to the visitor number target of 1m by 2030
7. KB to arrange one to one meetings with Board members to discuss and agree the position for the next ten years
8. Board to provide KB with any further comments on the revised JDP by 26th October following which KB will prepare a draft of the same
9. LA to contact Trip Advisor to discuss concerns around listings/categories/imagery
10. DE to provide a breakdown of visitors using Air Lingus into leisure, business, charter, package
11. TC to liaise with Directors about joining the Audit Committee to replace DB
12. KB to rename CEO Report when saving in SharePoint
13. Board to discuss data on air connectivity (attached to Trends Report) in more detail at a future meeting
14. KB to update risk register to highlight concerns around Fly BE
15. KK/DB to discuss role of future CEO of POJ on Board/attendance of interim CEO at future meetings
16. KB to invite BA representative to a future board meeting.