

Visitor Economy Strategy Steering Group
Meeting Minutes
12th December 2024

Attendees:

Olivia Chaplin (OC)
Tim Crowley (TC)
Patrick Burke (PB)
Marcus Calvani (MC)
Ana Calvani (AC)
Erin Garraghan (EG)
Stephen King (SK)
Tricia Warwick (TW)

Agenda:

Route development outlook (as agreed as action at last meeting)
2025 Forecasts
CX Impact fund and Skills Fund
Sustainability working group
Islander research project
JHA to present on thinking around industry-related actions
2025 actions
VESG scope and meetings 2025

Summary of Meeting:

- Route development

SK explained the process and relationship between destination marketing (making people aware of the destination, VJ remit), route development (POJ's relationship with airlines and ensuring Jersey is part of their strategic plan and negotiating a commercial support package) and route marketing (promoting these specific travel routes both inbound and outbound.) Provided an update on route development outlook for 2025 which is confidential at this time. SK also emphasised maintaining relationships with existing routes and markets to ensure their continued success.

The group discussed lessons learned from the Amsterdam route and explained how VJ and POJ are working together to look at the best holistic solution for both leisure and business visitors and islanders. The group spoke about knowing visitor's expectations when they arrive on island and VJ noted their relationship with Group Expression in Paris who gather insights for them in the French market. The opportunity of capturing longer-haul travellers who are visiting Europe to extend their trip to Jersey was also mentioned.

- 2025 forecasts

Forecasts will be presented in VJ annual briefing 28th January. TW explained how VJ previously used Oxford Economics, a UK based company, but are now in conversation to look at better, more accurate modelling with the data we have available on island. VJ have already held 2 workshops to begin developing the statistics into formal forecasts. A potential challenge was

raised regarding validity of data, but it was agreed that this would be the best and potentially only method to generate forecasts accurately at this time.

The group highlighted the need to monitor the rate of recovery in the UK and mentioned a trend of decline in business travel due to rise in Teams use and environmental consciousness. The post-COVID boost of people travelling is now levelling out and people are staying in Jersey for shorter lengths, in line with global short-break trends, but spending more. The need for businesses to adapt their product to reflect this trend was noted. TC also mentioned the need for industry to co-ordinate more to amplify their product to visitors.

- Impact fund and Skills customer experience training

Applications close for Impact Jersey fund on 15th January. JHA noted the timing of the fund coming at a busy period for the industry, OC clarified that this Impact fund is more aimed at tech innovators to help provide solutions for the industry, rather than a productivity fund for retail/hospitality business owners to bid for their own business. JHA requested further clarification from Digital Jersey and a potential extension to the deadline.

The soon to be published Retail Roadmap is organising GOJ funded customer experience training to run throughout 2025. More details and clarity on who will be eligible to follow.

- Sustainability working group

Action from the Visitor Economy Strategy. OC updated that the group has held 2 meetings so far. Agreed in these meetings that the group will act as both industry and customer engagement, and as a positive space to champion leaders and identify where more progress can be made.

- JHA update on actions 13 and 33

JHA presented timeline of proposed events for 2025 to the group and updated the group on their discussion with Local Economy team in GOJ. Clashes with other industry events were mentioned, group agreed there is a need for year-round calendar of events and collaborative working practices within industry to amplify events that take place to attract visitors and islanders. OC noted that a workstream in the Events Framework will speak to this. Working on the 'foodie' pillar in 2025 as Jersey has great produce year-round. Group also agreed further discussion needed regarding innovation in other areas of the Visitor Economy which will be scoped in 2025.

- VESG scope and meetings 2025

Group agreed need for VESG to still meet quarterly to provide updates on delivery. Potential need for a longer annual meeting with delivery partners to plan for year the ahead, by updating deliverables and action plan.

Actions:

- Group to provide feedback to JHA regarding Delicious Dine-Out, and JHA to share statistics from 2024 when available
- OC/EG to draft ToR for Sustainability Working Group and share with this group, scope and membership to be clarified
- VJ to schedule quarterly 2025 meetings, dates to be agreed with group – **complete**

No	Summary	Policy Priorities	Responsible	Due date	Progress	Comments	Budget required
1	Passenger forecast and route development strategy	1.2	Ports of Jersey	Q1 2024	100%	(Complete but commercially sensitive)	
2	Connectivity and bedstock analysis – target capacity	1.1	Ports of Jersey, GoJ Economic Analysis Unit	Q4 2024	75%	Work on demand and tourism capacity forecasts has begun and will be used to conduct further supply analysis. Work ongoing to determine measures to enhance likelihood of investment in bedstock in Jersey.	
3	Conduct Evaluation of economic impact of connectivity and present case for establishment of a Route Development Fund	1.3	Ports of Jersey, VJ, GoJ Economic Analysis Unit	Q3 2024	100%	Route Development funding agreed as part of the Better Business support package launched in December	
4	Conduct market testing for potential accommodation development - La Folie site	2.7	Ports of Jersey	Q2 2024	100%	Market testing complete. La Folie being used as a test case for investment in additional Hotel capacity. Pre-planning advice has been shared with Ports of Jersey in anticipation of public tender for development of the site.	
5	Addition of floating visitor accommodation in St Helier marina	2.7	Ports of Jersey	Q3 2024	100%	First two pods installed and available to book here https://www.ports.je/jerseymarinas/the-shells/	
6	Conduct hotel investment market research and identify policy levers to be explored	2.8	Government – Economy	Q4 2024	40%	Policy research commissioned (sensitive and not available for publication at this time). Further policy work needed to understand the economic imperative, evidence need for accommodation and develop appropriate policy to stimulate hotel investment.	Y

No	Summary	Policy Priorities	Responsible	Due date	Progress	Comments	Budget required
7	Identification of sites for new visitor accommodation	2.7	Government – Economy, SPPP, Environment (Planning)	Q4 2024	70%	Potential sites identified and discussions with controlling parties on-going.	
8	Develop a playbook for Inward Investment in Accommodation to articulate the opportunity and market available sites, including policy levers identified above where relevant	2.10	Government - Economy	Medium Term	0%	To be developed once further policy work has been completed and we have a clear and compelling case for investment.	Y
9	Develop clear cross-government policy around short-term holiday lets and communicate with landlords using Airbnb or other platforms	2.90	Government - Economy, SPPP, Regulation	Q3 2024	60%	Website update required in order to clarify current policy. No further policy changes expected at this time.	
10	Work with Visit Jersey to make improvements to the Airport & Harbours arrival experience	3.11	Ports of Jersey	Q2 2024	100%	Initial phase of enhancements to the arrivals process complete (new customer signage / visuals, collaboration with ArtHouse Jersey, refresh of arrivals areas). Scoping of customer journey work underway to identify gaps	

No	Summary	Policy Priorities	Responsible	Due date	Progress	Comments	Budget required
11	Open a pop-up Visitor Information Centre at the Jersey Museum	3.12	Visit Jersey	Q2 2024	100%	Complete and in place	
12	Develop a more permanent solution for Visitor Information Services	3.12	Visit Jersey	Medium Term	60%	Partnering with Jersey Heritage to redesign ground floor for permanent visitor centre. Design work in progress.	Y
13	Scope and begin to deliver a product innovation campaign for industry	3.14; 8.45	JHA	Medium Term	20%	Delicious Dine-out Festival/Event for local venues, producers and suppliers (not just F&B) to highlight their local product offering. Further work to be done in 2025 to develop a plan for stimulating further product innovation and collaboration between industries.	?
14	Formation of an events working group to oversee the creation of a strategy, events calendar and facilitate the organisation of public events in Jersey	4.26, 7.42	Government – Economy	Q4 2024	100%	Local Economy held events workshops in Q2 and Q4 2024 with internal and external stakeholders to discuss various areas contained in the Events Framework. Work will continue in 2025	

No	Summary	Policy Priorities	Responsible	Due date	Progress	Comments	Budget required
15	Deliver animation and physical improvements to the High street and Central markets as part of the ongoing regeneration and public realm improvements	3.18; 4.26	Government – Economy	Q4 2024	100%	Meanwhile use of vacant high street units in 2024 included: RNLI, Lunar New Year, Festival of Words, charities collaborating with photographer Max Young. Town Team established and meeting regularly, will be a vehicle for future animation and improvement in 2025. Vacant market units filled with new tenants after a commercial entry process. Infrastructure, responsible for public realm, released roadmap for physical developments.	Y
16	Opera House & Elisabeth Castle Capital projects	3.17	Government – Economy	Medium Term	60%	JOH project completed earlier than scheduled and under budget Q4 2024. Elisabeth Castle encountered delays, inclement weather to and from the site, Officers' Quarters is nearing completion with Hospital Block kitchen and function rooms to follow.	
17	Conduct Sector Productivity review to identify opportunities for improving productivity in the sector	4.19	Government – Economy	Q3 2024	80%	In progress - due for publication end of Q4 once 2023 productivity data has been analysed	
18	Form a working group to include Ports of Jersey, Visit Jersey and government officers to agree scope of work for	4.22, 4.23	Government – Economy, Environment	Q4 2024	100%	Working group formed and first meetings have taken place.	

No	Summary	Policy Priorities	Responsible	Due date	Progress	Comments	Budget required
	sustainability for the visitor economy						
19	Appoint a new creative agency and launch new brand campaign	5.30	Visit Jersey	Q2 2024	100%	Complete and in place	
20	Activate a Local Ambassador programme to engage islanders	5.31	Visit Jersey	Medium term	10%	Research into local community perceptions and engagement with tourism to be conducted in early 2025.	Y
21	Scope and launch RFP for Industry Data Hub	6.32	Visit Jersey	Q2 2024	70%	Improvements in - Data processing, analysis and sharing have begun in 2024.	Y
22	Scope a Digital Booking tool for activities and events on island	6.33; 3.12	Visit Jersey	Q4 2024	10%	Held workshop with industry specialist. Progress on hold pending outcome of Impact Jersey grant programme.	Y
23	Attend careers fairs and conduct industry promotion activity in schools	4.25	JHA	Q4 2024	100%	Attended over 10 careers fairs in 2024. Continue in 2025 to review most effective way to engage with young people and demonstrate potential career opportunities.	
24	Produce sector specific packages of support, guidance and training to enable businesses to assess and prioritise the digital	6.34	Digital Jersey & Jersey Business	Q4 2024	75%	Impact Jersey CX Tech programme launched with focus on retail, hospitality, transport, logistics and supply chain.	

No	Summary	Policy Priorities	Responsible	Due date	Progress	Comments	Budget required
	tools needed for their businesses						
25	Identify key gaps in digital adoption and provide training and/or advice to industry groups	6.37	Digital Jersey & Jersey Business	Q4 2024	100%	JB 2024 productivity survey (https://www.jerseybusiness.je/media/ljubgeak/productivity-survey-results-2024.pdf) has identified Visitor and Retail as having gaps in digital adoption. In 2025 more training will be developed to focus on adoption.	
26	Deliver annual technology roadmap for specific sectors such as retail, construction or tourism	6.34	Digital Jersey & Jersey Business	Q4 2024	0%	DJ are developing technology sector road maps, with the first focused on Agriculture (AgriTech). This AgriTech roadmap will be shared with JB soon and then with the Digital Economy Delivery Board. Recommended that the next focus be on customer experience in the retail and visitor sectors.	
27	Short-term holiday lets (amendments to the General Development order)	2.9;	Government – SPPP	Q2 2024	100%	Complete and in place	
28	Tourism General Provisions Order - removal of special standards	7.41	Government – Economy	Q1 2024	100%	Complete and in place	
29	Tourism General Provisions Order - other amends	7.41	Government – Economy	Q4 2024	60%	Industry feedback has been sought and will be fed into revisions.	Y
30	Events Legislation development	7.42	Government – Economy	Medium Term	20%	Work underway on Strategic Events Plan, Events Partnership and Events Effectiveness Framework. Law drafting instructions	Y

No	Summary	Policy Priorities	Responsible	Due date	Progress	Comments	Budget required
						developed following 2 workshops with internal and external stakeholders.	
31	Licensing Law Review & Amendments	7.41	Government – Economy	Q4 2024	100%	Review undertaken in 2024, with public consultation on proposed changes launched end of December. Law drafting and States debate scheduled for 2025	Y
32	Hold quarterly VESG meetings to coordinate and report against deliverables	8.47	Government – Economy	Q4 2024	100%	On track.	
33	Design mechanism for celebrating best practice (eg innovation, collaboration)	8.48	JHA	Q3 2024	40%	Discussions taking place to understand physical and digital options for mechanism for celebrating best practice. Further work to be done in 2025 with JHA board and relevant stakeholders to understand cost and resource implications.	