

Visitor Economy Strategy Steering Group

Meeting Minutes

3rd October 2024

Attendees:

Heath Harvey (HH) (Chair)
Tricia Warwick (TW)
Stephen King (SK)
Ana Calvani (AC)
Patrick Burke (PB)
Olivia Chaplin (OC)
Andrew Shrimpton (AS)
Marcus Calvani (MC)
Erin Garraghan (EG)
Claire Dupoy (CD)

Agenda:

- Reminder to update delivery plan
- Update on AHC
- AOB
 - Ferry procurement and town appearance

Summary of Meeting:

- **UK Visitor Economy Insights**

OC shared insights from the 2024 Annual Hospitality Conference, noting that the current market performance of Jersey is not dissimilar to the UK as transactions have been limited but are expected to start picking up. Hotel industry is favouring existing property rather than development; development only occurring when councils are intervening, e.g. Sheffield and the Radisson Group agreed a need to further understand how Government intervention would look in Jersey.

TW reflected on the Future Travel Conference and JFL Annual Private Wealth Event, noting a general negative UK atmosphere meaning UHNWI are looking to Jersey. VJ and tourism industry should continue to act and talk positively about our destination

- **Bergerac**

Meeting attendees viewed a 5-minute BBC News (National, not regional news) feature on Bergerac. TW commented that Bergerac could do more for Jersey than VJ are able to with what is currently available to them. Funding for a potential second series was discussed.

TW mentioned that the main target demographic for VJ has not changed. Older 'easy explorers' are our largest segment and high repeaters versus the younger 'moment makers' who are looking for different experiences, which as a destination we need to amplify and introduce new products to attract this segment. VJ focus groups finding that British are more aware of Jersey, so we need to move them onto consideration in the marketing funnel, versus German and French visitors still at brand awareness stage hence low awareness of Jersey.

- Events

TW noted international plans to mark the 1000th anniversary of the birth of William the Conqueror in 2027 with France and the UK already capitalising on the milestone. Group agreed Jersey should get involved on the buzz and take advantage of our Norman history and French facing relationship.

HH mentioned Battle of Flowers 2024 re-focused and delivering desired outcomes with 16,000 tickets sold and 11 months of community engagement and activity via Parish float teams. Group reassured that GOJ events working group is on track, with the aim to understand frustrations of current event application processes and how to streamline these plus ensure events are aligned with strategic objectives, alongside supporting organisers to innovate.

- Government intervention in hotel development

SK asked the timeframe on looking into GOJ intervention in hotel development. OC responded that research would begin end of 2024, highlighting the need for policy development and political buy-in before potential levers can be investigated in 2025. Also noted general property market issues in Jersey. MC raised JHA member frustrations, and that political awareness should be focused on imminently.

AS asked about the proposed channels to link private investors with GOJ sites, HH noted this and confirmed that the PFM would require this to be a completely transparent procurement process. PB commented that industry has been in decline for decades and the further it declines the harder it will be to resuscitate regarding the potential negative impact of the living wage scheme. This concern was acknowledged by the Group and as discussed earlier, work is to be done on articulating the problem both internally and externally.

- Government prioritisation

MC commended DFE on recent diversification, HH emphasised the 'Big 5' priorities approach and focus on (1) events framework (efficacy and distribution), (2) legislation amends (events, tourism, alcohol licensing), (3) capital projects (Opera House and Elizabeth Castle), (4) ferry procurement and (5) inward investment (attracting businesses that align to Jersey's needs). MC noted GOJ mindset needs to change from regulation to facilitation.

AS asked what lessons can be learned from the Broad Street development. A discussion was had about the importance of aligned messaging between lobbying organisations and internally to ensure the risks around development and economic impact are understood.

- Actions update

Action leads provided updates on various actions, see table in appendix.

Question raised on ferry procurement, GOJ not in place to comment at this time.

Post-meeting, further info shared re GOJ plans around public realm.

<https://statesassembly.gov.je/assemblyreports/2024/r.158-2024.pdf>

- Actions:

- Internal meetings re capacity for bed stock analysis (EAU, VJ, POJ, DFE) - **complete**
- OC reminded group to update action list and RAG offline before meeting – **complete**

- Next meeting 12th December 2024

- POJ route development
- 2025 actions and deliverables

No	Summary	Policy Priorities	Responsible	Due date	Progress	Comments
1	Passenger forecast and route development strategy	1.2	Ports of Jersey	Q1 2024	100%	(Complete but commercially sensitive.)
2	Connectivity and bed stock analysis – target capacity	1.1	Ports of Jersey, VJ, 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 with Planning & Economy to determine measures to enhance likelihood of investment in bed stock 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	90%	Multiple workstreams ongoing with Government to determine scope for establishment of Route Development funding. This has superseded the requirement for the economic impact evaluation work, which can be undertaken in 2025 if required.
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. Further work with GoJ Planning & Economy teams to inform decision on whether to commence formal procurement process.
5	Addition of floating visitor accommodation in St Helier marina	2.7	Ports of Jersey	Q3 2024	90%	Purchase of 2X visitor accommodation complete & planning approval received. Expected to be installed Q4 2024.
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 and political steer to be sought to gauge appetite for government intervention to stimulate hotel investment.
7	Identification of sites for new visitor accommodation	2.7	Government – Economy, SPPP, Environment (Planning)	Q4 2024	70%	Potential sites identified. Further internal discussion needed to gauge appetite for pursuing hotel development on these sites.

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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%	Work to be progressed once political steer and further policy work has been done - expected in 2025 at the earliest.
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 processes complete (new customer signage / visuals, collaboration with ArtHouse Jersey, refresh of arrivals areas). Scoping of customer journey work underway to identify gaps.
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	10%	Partnering with Jersey Heritage to redesign ground floor for permanent visitor centre. Design work in progress.
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	20%	Local Economy held event in Q2/2024 with internal and external stakeholders to discuss various areas contained in the Events Framework. Resources recently secured to oversee delivery of the framework, work underway to set project plan and determine key players in delivery.

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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.
16	Opera House & Elisabeth Castle Capital projects	3.17	Government – Economy	Medium Term	50%	Agreed JOH Refurbishment Scope of Works is on budget and time with practical completion end of Dec 2024. Two phases to the capital project for Castle: Renovate Officers Quarters into x 12 units of accommodation (double rooms with sofa bed) with capacity for 30 plus ensembles for each room. Practical completion end of Oct/early Nov 2024. Refurbishment of Hospital Block and Old Coal Store practical completion early 2025. Being off island has caused delays to/from the site, due to inclement weather.
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 sustainability for the visitor economy	4.22, 4.23	Government – Economy, Environment	Q4 2024	80%	Working group formed and first meeting has taken place.
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 end of 2024.

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21	Scope and launch RFP for Industry Data Hub	6.32	Visit Jersey	Q2 2024	50%	Scoping in progress with improvements to data processing, analysis and sharing expected to be developed in 2025.
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.
23	Attend careers fairs and conduct industry promotion activity in schools	4.25	JHA	Q4 2024	100%	Attended over 10 careers fairs in 2024. Will 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 tools needed for their businesses	6.34	Digital Jersey & Jersey Business	Q4 2024	75%	The next Impact Jersey programme will focus on customer experience and is expected to launch in November with a focus on tech adoption.
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	Medium Term	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. The next focus should 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 spacial 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	30%	Industry feedback has been sought and will be fed into revisions.
30	Events Legislation development	7.42	Government – Economy	Medium Term	10%	Commenced developing law drafting instructions.

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31	Licensing Law Review & Amendments	7.41	Government – Economy	Q4 2024	30%	Policy under development. Industry and public consultation expected to launch Q4 2024.
32	Hold quarterly VESG meetings to coordinate and report against deliverables	8.47	Government – Economy	Q4 2024	75%	On track.
33	Design mechanism for celebrating best practice (eg innovation, collaboration)	8.48	JHA	Q3 2024	10%	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.