5 December 2025

To: The Public Accounts Committee

Subject: Arm's Length Bodies, Grants and Subsidies Review

Dear Deputy Gardiner,

Thank you for the opportunity to contribute to the Arm's Length Bodies, Grants and Subsidies Review. In response to your request for further information, please find the responses below that address the specific areas outlined in your request.

1. Please can you confirm the total marketing spend for the years 2022- 2025, broken down by on-island and off-island campaigns and further broken down by staff remuneration and consultancy costs?

Marketing Spend	Spend off-Island	Spend on-Island
2022	£4,660m	£250k
2023	£3,587m	£245k
2024	£4,055m	£245k
2025	£5.697m	£245k

Visit Jersey's marketing spend is predominantly targeted off-island to achieve its core objective of bringing visitors to Jersey. On-island spend is targeted to support the local industry and visitors.

Within the normal scope of its activities, VJL does not employ external consultants to give expert advice. Visit Jersey employs UK, French and German retained agencies to provide operational marketing to these territories. Visit Jersey does not have an IT or HR department and relies on external retained support. Visit Jersey has in-house legal counsel and only uses external lawyers when specialist legal support is required. In summary, VJL uses retained support to carry out work that would need to be done in-house at greater cost. The only example we can give in recent years of VJL employing consultants for expert advice is for the sustainable tourism strategy, which was commissioned and paid for by the Visitor Economy Strategy budget.

Salaries	Total Spend
2022	£1.271m
2023	£1.559m
2024	£1.706m
2025	£1.750m

Note: Post-COVID pay awards were in line with RPI. Factors like reopening the Visitor Information Service at the Museum in 2024 make year-on-year comparisons inaccurate.

2. What efficiency and productivity increasing measures have you taken within your own organisation to improve value for money internally?

Visit Jersey demonstrates value for money through a mix of economic, research, and marketing-performance frameworks, comprised of economic impact, campaign ROI, and operational efficiency:

- Economic Impact - tracks growth in visitors, visitor spend
- A Clear ROI Model - major campaigns and events are measured to ensure a return on investment, with marketing spend adjusted accordingly
- Robust Research and Digital Analytics - including exit surveys, NPS and GA4 data, to show behavioural change and campaign effectiveness

Value for money and productivity are an integral part of the Visit Jersey annual business planning process and day-to-day operations. During the annual business planning process, all costs for the forthcoming year are scrutinised, including operational, payroll, and administration costs.

In terms of further stretching our grant to maximise marketing spend, VJL delivers maximum value and impact through cash-matched funding we negotiate and secure with key trade partners, including tour operators and airlines, as well as strategic brand partnerships. In 2025, VJL raised £332k in cash-matched funding from co-op and trade partners, in addition to our core grant. In 2026, the target for cash-matched funding will rise to £355k, a 7% year-on-year increase.

3. Please provide any consideration as to the size of your board, and confirm if any recommendation has been given by the Government of Jersey in this regard?

The VJL Board comprises seven Non-Executive Directors (NEDs) and one Executive Director. NEDs serve a three-year term, which can be extended to six years. The Board is subject to biannual external effectiveness reviews, and a skills matrix is compiled to assess skills required on rotation of retiring NEDs and recruitment of new ones.

The size of the Board is determined by the strategic skills required to run a destination marketing organisation. All our Board members have specific expertise in relevant areas. The overall structure of Visit Jersey's Board was set out in the Tourism Shadow Board's Preliminary Report in March 2014 (p. 25). The implementation of the report's findings was agreed with the Government on the establishment of VJL.

The Board closely aligns with the Department of the Economy, and the Head of Local Economy or Chief Officer attends VJL Board meetings. The Chief Executive of the Ports of Jersey also attends VJL Board meetings as an observer, to ensure alignment. In appointing a new Chair in 2025, VJL worked with the Jersey Appointments Commission, and the Chief Officer of the Department for the Economy sat on the interviewing panel.

4. Are there any comments you wish to make on the Government of Jersey internal review of Visit Jersey undertaken in 2024?

VJL were not privy to the GoJ's 2024 internal review of Visit Jersey, and we are therefore unable to comment on it.

5. Do you believe there is a need for further reviews of your own or other Arm's Length Bodies, either separately or jointly?

VJL supports the principles of good governance and oversight as set out in its Partnership Agreement with GoJ and is transparent and accountable. VJL was subject to a review in 2019 by the Comptroller and Auditor General, and it implemented its findings and recommendations.

Although we can only comment on our own position, we do not believe that any further fundamental review of Visit Jersey's operating structure is required. However, we do believe that a review of Visit Jersey's funding is needed to ensure the long-term future of the visitor economy in the Island. We highlight this by citing that Visit Jersey's core grant has decreased in monetary terms since its inception and, in real terms, by 49%.

6. In your view, would establishing a joint premises for Arm's Length Bodies provide efficiencies and what considerations have been held on this matter?

VJL considered this in 2021 and collaborated with Jersey Sport and Jersey Business to assess viability. The resultant internal Board report concluded that Visit Jersey had a small team, did not run courses or external training from its premises, and therefore only required a small office to operate from. At the time, the joint-tenant solution would have increased VJL's office rental costs by 60%, before relocation costs. However, from a macro perspective, VJL can see a potential overall benefit. Therefore, providing a joint-tenant solution did not increase overall office costs; VJL would be open to considering a future solution.

7. In your view would establishing joint boards for Arm's Length Bodies provide efficiencies and what considerations have been held on this matter?

The VJL Board is comprised of local and off-island industry leaders from the travel and hospitality sector, who provide a valuable blend of local and global strategic expertise. VJL NEDs offer valuable knowledge and insights specific to the tourism industry, informing decision-making at VJL and guiding the strategic vision for Jersey's visitor economy. VJL's NED fees are forecast to be under 2% of its core grant in 2026. Total NED fees have risen by 17% since 2016, while the RPI was circa 50%. In summary, our firm belief is that creating a homogeneous joint Board would not be feasible given the differing purposes and roles the various ALBs perform.

8. In your view would narrowing scope or objective of any Arm's Length Bodies provide efficiencies and what considerations have been held on this matter?

VJL's scope and objectives are set out in its Grant Agreement with GoJ. The agreement was signed in 2025; therefore, the organisation's scope and objectives were recently considered in depth. The scope of VJL's work is specific to the visitor economy, and we reasonably believe it could not be narrowed much further. However, oversight and management of the Exit Survey should be transferred to Statistics Jersey, as this requires a separation to maintain its independence and credibility.

9. In your view would amalgamation of any Arm's Length Bodies into single entities provide efficiencies and what considerations have been held on this matter?

VJL's scope and objectives are specific to the Visitor Economy. However, we believe that VJL could play a role in the wider international marketing of 'brand' Jersey to maximise awareness and reach on the global stage. Currently, VJL meets formally with other ALBs monthly to discuss areas of mutual interest where we can synergise activities and avoid duplicating resources.

10. Would joint procurement by any of the Arm's Length Bodies provide efficiencies and what considerations have been held on this matter

VJL regularly consults with colleagues in the other ALBs to benchmark the cost of goods and services, ensuring we secure the best value from suppliers. A working example of this is the annual audit, which was considered by our Audit and Risk Committee in 2025 and benchmarked against other ALBs. Visit Jersey jointly procures services with other ALBs where possible; for example, our Annual Briefing is held in tandem with Jersey Finance to save on venue and event costs.

Yours sincerely,

Signed by:

Tricia Warwick

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Tricia Warwick

CEO, Visit Jersey