States of Jersey
States Assembly

États de Jersey
Assemblée des États

Public Accounts Committee

Arm's Length Bodies, Grants and Subsidies Review

Witness: Visit Jersey

Wednesday, 19th November 2025

Please note this transcript has not yet been reviewed for factual accuracy. It is currently undergoing a verification process, during which relevant attendees are invited to check and confirm the accuracy of the information presented. A final, fact-checked version will be published once this process is complete. In the meantime, readers should treat this transcript as a draft and be aware that factual accuracy corrections may follow.

Panel:

Deputy I. Gardiner of St. Helier North (Chair)
Deputy K.L. Moore of St. Mary, St. Ouen and St. Peter (Vice-Chair)
Deputy R.S. Kovacs of St. Saviour
Deputy D.J. Warr of St. Helier Central
Mr. V. Khakhria, Lay Member
Mr. G. Kehoe, Lay Member
Ms. L. Pamment, Comptroller and Auditor General
Ms. H. Deputy Comptroller and Auditor General

Witnesses:

Ms. T. Warwick, Chief Executive Officer, Visit Jersey
Mr. M. George, Chair, Visit Jersey
Mr. D. Schofield, Head of Corporate Services, Visit Jersey

[13:58]

Deputy I. Gardiner of St. Helier North (Chair):

Good afternoon, and welcome to the public hearing of the Public Accounts Committee. Our public hearing today is Visit Jersey as part of our arm's length bodies, grants and subsidies review. We will be questioning today the Chief Executive of Visit Jersey on governance arrangements, relationship with the Government and risk management. We will not be asking you questions about remuneration, as we sent letters to your board and they would need to respond direct to us. Thank you for coming and for contributing in advance. But before we will start, let us do introduction. Deputy Inna Gardiner, Chair of the Public Accounts Committee.

Mr. G. Kehoe:
Glen Kehoe, lay member.

Deputy R.S. Kovacs of St. Saviour:
Deputy Kovacs, member of the Committee.

Mr. V. Khakhria:
Vijay Khakhria, lay member.

[14:00]

Deputy D.J. Warr of St. Helier Central:
I am David Warr, member.

Deputy I. Gardiner:
Also online with us, Deputy?

Deputy K.L. Moore of St. Mary, St. Ouen and St. Peter (Vice-Chair):
Deputy Kristina Moore, Vice-Chair of the Panel.

Deputy I. Gardiner:
Present in the room.

Deputy Comptroller and Auditor General:
Helen Thompson, Deputy Comptroller and Auditor General.

Deputy I. Gardiner:
Also online.

Comptroller and Auditor General:

Lynn Pamment, Comptroller and Auditor General.

Deputy I. Gardiner:
Thank you very much. Tricia, please.

Chief Executive Officer, Visit Jersey:
Yes, Tricia Warwick, Chief Executive for Visit Jersey.

Chair, Visit Jersey:
Martin George, I am Chair of Visit Jersey.

Head of Corporate Services, Visit Jersey
David Schofield, I am Head of Corporate Services for Visit Jersey.

Deputy I. Gardiner:
Thank you very much. We will start with our first area of questions, governance of Visit Jersey and I will hand to Vijay.

Mr. V. Khakhria:
Thank you. Visit Jersey began trading in 2015, with your mission being: "To promote tourism to and within Jersey in an innovative, economic and efficient way, with longer-term priorities being to inspire visitors from overseas to visit and explore Jersey, maximise public investment through partner engagement, and advise Government and the industry on tourism issues." Since then, your most recent submission tells us that the ultimate objectives of Visit Jersey are defined in the current partnership agreement running from the beginning of this year until the end of 2027, where you have 6 ultimate objectives, which include: "Promoting Jersey as a tourism destination, inspire visitors from overseas, develop product and brand narratives that are consistent with your destination ambition; consumer needs and broader Island identity; to collect and share data on visitor volumes, et cetera; provide visitor information services to enable visitors to discover Jersey before and during their visit, support productivity improvement; and to embed responsible tourism, environmental stewardship and diversity and inclusion in the organisation's marketing and monitoring activity." Our question is, do you still pursue your original set of functions and how have these functions evolved under the current agreement, please?

Chief Executive Officer, Visit Jersey:
Yes. I think the core reality of what Visit Jersey is there to do is to market and promote the Island, to bring visitors to the Island. I think what was set out in 2015 and what we do now, those core values remain the same. What did happen, I suppose, between 2015 and now is quite a lot of

change in the world. We had the COVID pandemic, we had a lot of change in many markets that we operate in, the type of customers and so on. Our partnership agreement was redone last year and that was a chance to review those objectives. In partnership with Richard Corrigan and Heath Harvey, our officers in the Economy Department, they worked with us to produce that partnership agreement. It is as on point for now as it can be.

Mr. V. Khakhria:
Okay. Thank you. We are also interested in the question of collaboration with other arm's length organisations on the Island. This is a much wider question about demarcation points and collaboration. We would like to understand where one organisation ends, where the next one starts, and whether you do currently collaborate or is there duplication. We are looking at de-duplication in particular, but also clear bright lines of demarcation. The questions involve what joint work have you done with other organisations? There are other promotional organisations like Ports, Jersey Business, Jersey Finance, Digital Jersey. So, it is to do with what joint work you have done? How do you prevent duplication of marketing functions? What levels of consultation do you have with the other organisations when you are developing your plans? As I have outlined, where do you see the clear demarcation lines? Finally, in terms of data collection, I mean data collection does seem like a very natural candidate for joining efforts.

Chief Executive Officer, Visit Jersey:
Yes. Okay. Wow, big question. So, first things first. We definitely collaborate with the other A.L.O.s (arm's length organisations). I will take them one by one to try and break it down. I will start with Ports of Jersey. Ports of Jersey, we work very closely with because at a base level they are responsible for getting the planes, the route development, deciding the network of operations for both sea and air. When they do a deal with the airline to fly in, be it British Airways, easyJet, whoever it may be, part of that remit is co-operative marketing with that airline, okay. That is part of their commercial deal with the airline. That commercial deal is struck between Ports of Jersey and the airline. The execution of that marketing is done by us. There is not a marketing department per se in Ports, we are the marketing department for Ports of Jersey. That probably helps explain that delineation as well between our 2 organisations. We meet regularly, formally once a month. We also have a quarterly with Ports of Jersey where we look strategically at our plans. Then I have day-to-day conversations with Matt Thomas, Stephen King, the C.E.O. (Chief Executive Officer) and C.O.O. (Chief Operating Officer).

Chair, Visit Jersey:
Matt is an observer on our board, as well, is he not?

Chief Executive Officer, Visit Jersey:

Matt Thomas is also an observer on the Visit Jersey Board. I will do Jersey Business next. With Jersey Business, we are collaborating twofold. One is on the Better Business Support Programme, because as you probably know, we have a grant from B.B.S.P. (Better Business Support Programme), as do Jersey Business, and they are looking at monitoring all the applications for co-funding for whether it is productivity improvement, there is a pot in there for visitor economy improvements. Very clearly, they do that, not us. But I am consulted by Paul Murphy if he has got a question that is, if you like, subject matter specialist question, then he will ask me. Other than that, again, we meet regularly as A.L.O.s once a month. We have a quorum once a month where we meet and raise issues and discuss how we can better collaborate together. We are doing it, but it is what else can you do even better? It is continuous improvement, I suppose. That runs well with Jersey Business. I do not see a duplication really. What their work is, they are working with local businesses to improve productivity, or skills, or training. That is not something we get involved in. Then if I move to Digital Jersey. Digital Jersey, we have done co-operative ... well, they do run a training academy and obviously they are very focused on digital. We have run digital training programmes with them for our industry on Island. So, getting hoteliers in, getting restaurants in, and so on, to learn more about how to market themselves in a digital world. We have done that with them. We co-presented each other's meetings at their annual briefings and so on. Again, I talk with Tony about projects. Again, he has got funds for people wanting to invest in certain programmes. There is a live one at the moment about data collection and a data trust, which I think industry are looking to get some investment from Digital Jersey, so I am being consulted on that as well. Have I have forgotten anybody? Jersey Finance, I wanted to mention. Again, he attends the monthly with us, Joe Moynihan. Then they have various overseas events where they are promoting Jersey Finance. The one big event they do with the high net worths in London is every September and we attend that and have a stand there, as a lot of financial services businesses in Jersey do. But Visit Jersey is there then in that guise as well. We share data. They use our assets a lot in their marketing collateral. Again, we are probably the repository on the Island for images, asset library, video, all that stuff is done by us and shared with the other A.L.O.s. We do not have lots of different film shoots going out and photographers. It is all done by us.

Deputy I. Gardiner:

Just a very quick question. Jersey Island Identity Project, did you have any engagement with it?

Chief Executive Officer, Visit Jersey:

Yes. I spoke, when I first joined, with Carolyn Labey, who was the lady, I believe, that was in charge of that identity programme. There were a lot of recommendations in there, if you remember from her report. What we have been doing is looking at Islander engagement for promoting the visitor economy to visitors when they are here. The type of thing we are talking about, and it is not activated yet, because I did discuss it several times with Carolyn, is we would like to do an ambassador programme. She showed me some business cards that are given to States Members and people traveling overseas, which has got a little Q.R. (quick response) code, which you click on, and then it takes you to a little microsite on Jersey. I said: "Why do not we give one of those to everybody on the Island, because they could all be natural ambassadors for Jersey." So, we are talking about some sort of Island engagement on that level. Not happened yet.

Mr. V. Khakhria:
One slightly more detailed question in relation to airlines. You mentioned that you work as the marketing partner for the airlines, presumably what the airlines have negotiated with P.O.J. (Ports of Jersey). Before we get to that point, there is the question of route development and deciding which routes to ... where to go to. What involvement do you have with the marketing aspects of that with developing where to go to and identifying those places?

Chief Executive Officer, Visit Jersey:
Yes. Obviously, it gets quite complicated. There are 2 things going on here. There has to be a feasibility study every time you are looking at a route development opportunity, which sits with Ports very much. We feed in when it comes down to the sort of tourism angle, of course, but they are looking at it in the round, because they are not just talking about tourism, they are talking about all passengers on board. The challenge we do have, and honestly it is reality, I mix airlines as well, and I used to work for B.A. (British Airways), so I know a bit about it, is that there is a shortage of aircraft in the planet at the moment. We are not top of the cherry pick list, if you like, and so sometimes we are offered what is left, not what we want. We have got our priority list, but we are not necessarily able to have what we want. Then Ports get into that negotiation of sort of pushing back on maybe: "No, thank you on that one. But, please, can we push for this?" It is a permanent long play negotiation that goes on, and sometimes this takes years.

Mr. V. Khakhria:
I understand the problem, and the question was to do with what is your involvement in solving that problem?

Chief Executive Officer, Visit Jersey:
Yes. Lobbying with them. There is a routes conference that takes place, it is a slots conference that takes place every quarter. It is like speed dating for slots, to be honest. You turn up and you have got your 15 minute pitch. So, I brief Ports. I have been to it in my history, but with Ports, to be quite honest, they are quite expensive things to attend and they are often all over the world. So Ports will attend but I will put the deck together with them on how we pitch Jersey. So the economic stuff, the hotel bed side of things, the attractions, the why Jersey story.

Mr. V. Khakhria:

That is absolutely great in terms of your involvement and that makes a hell of a lot of sense. Whose K.P.I. (key performance indicator) should that be?

Chief Executive Officer, Visit Jersey:

As to route development?

Mr. V. Khakhria:

Yes.

Chief Executive Officer, Visit Jersey:

Ports.

Mr. V. Khakhria:

Thank you. We will probably have some more questions but for the purposes of this hearing we will do them in writing.

Deputy I. Gardiner:

A couple of things that I would like to pick up from your questions. You said Ports is not the marketing agency?

Chief Executive Officer, Visit Jersey:

Yes.

Deputy I. Gardiner:

But when they are going out to pitch, they are pitching how we are marketing Jersey, why they should come to Jersey. How does this work?

Chief Executive Officer, Visit Jersey:

What they are doing, I would say, is they are being more commercial. They have got a sales role because they are trying to win that route for Jersey. There will be a financial negotiation that takes place to underwrite that route. Once that route is live, let us say, our job is to take that route to market and to drive visitors on to it.

Deputy I. Gardiner:

You said there is some negotiation between Ports of Jersey, Visit Jersey, as to which route to develop, you have your priority, they have their own priority. Where is Government in this?

Chief Executive Officer, Visit Jersey:
Yes. I would say that Kirsten is quite actively involved in that, as our Minister, in terms of sitting down with Ports as well, and Elaine Millar, Ports' Minister, in looking at the feasibility studies, the economic plan and the financials to see whether they agree with that before Ports go off and have those discussions. There is a sense check that we all get in a room, I think there is a connectivity meeting every 2 months, which is Deputy Morel, Ports of Jersey, Visit Jersey, where we sit down and have exactly those discussions.

Mr. G. Kehoe:
Based on what you have just said there, how do you demonstrate value for money from yourselves then, and how do you provide that support and what that looks like? Obviously, that value of money, and you have obviously got K.P.I.s that measure stuff based on those sort of conversations and everything you have, and then how does your strategic plans fit into all that, certainly for 2025? The only other one I have got really is trying to understand then the impacts that obviously certain things happen in the environment, and how you adjust your visitor abilities with these sort of incidents that happen at the moment?

[14:15]

Chief Executive Officer, Visit Jersey:
Yes. Okay. Right. I will start with value for money. This is probably 3-pronged. When I look at what Visit Jersey does, we have got 3 main approaches. Okay. We have economic impact on how we track visitor numbers into the Island, and obviously total visitor spend, value to the economy. We have the R.O.I. (return on investment) model for major campaigns, for marketing. We have got our visitor numbers, then we have got our return on investment for all our marketing campaigns. Then we have a third one, which is about the exit survey and the data that we research on our customers, so the things like guest satisfaction, N.P.S. (net promoter score). So, we have visitor numbers and spend as our corporate K.P.I.s, if you like, and then we have specific marketing K.P.I.s.

Mr. G. Kehoe:
On the back of those 2 things, I have got probably 2 more questions to ask. Earlier you mentioned that you have the Better Business Package. I believe you received £2 million on that?

Chief Executive Officer, Visit Jersey:
Yes, for 2025 and 2026.

Mr. G. Kehoe:

We have seen that the tourist numbers are not good. They have gone down by 20 per cent. Again, how do you justify this investment in you, when we have seen a decline in visitors, so therefore there is not ... the money is there for that £2 million investment you have had against yourselves?

Chief Executive Officer, Visit Jersey:

When we were awarded the B.B.S.P. fund, we were in a different position in terms of the numbers. The numbers up until 2024, plus 8 per cent increase. Now, not growing as fast post-pandemic as we would like, but certainly in the right trajectory. As we entered 2025, the money that we had used for B.B.S.P. had been committed in advance, because the way our market works, we have to put money down in advance. The big tranches of money for that were route marketing, so like underwriting things like the marketing for the new route to Paris with Blue Island, with the *Telegraph* campaign we did to support "Bergerac", and then the "Bergerac" production money. The challenge you have got is when you lock that money in, you cannot go and get a refund. You have committed to it. What we then have to do is be agile in how we use our budgets. When you realise numbers are not doing what you are supposed to, obviously you are trying to get out there and win as much business as you can and deliver the number. But when you realise you cannot, you have to start pausing stuff and saving the money and holding it back.

Mr. G. Kehoe:

Are those campaigns failing then? Is that what you are seeing?

Chief Executive Officer, Visit Jersey:

I do not know if it is failing, because each campaign you have to look at it on its merit. We do a lot of campaigns where the reach and the appeal and the eyeballs on that campaign are high, but we are bringing people to the front door, if you like, of Jersey.com invariably, but then we do not see the conversions to bookings. We cannot physically see did someone book, but we get them to the front door we can monitor that.

Mr. G. Kehoe:

Would you think the money would have been better invested in local attractions that then would thereby have a return by people wanting to come here? I know that is a bit of a tough question.

Chief Executive Officer, Visit Jersey:

I think it is apples with pears. We absolutely do need strong reasons why people should come to Jersey in the attractions field and in hotels and events and all sorts, but I would put them in different pockets to be honest, in terms of investment.

Mr. G. Kehoe:

The final one I have is that you mentioned the Visitor Exit Survey takes place. With obviously all that data that you collect, what role does the Government play in processing that data and understanding the outcomes?

Chief Executive Officer, Visit Jersey:

The Government or Visit Jersey?

Mr. G. Kehoe:

The Government with yourselves.

Chief Executive Officer, Visit Jersey:

I have been in post about 2 ½ years, and when I arrived, we did not have a data warehouse, we had data all over the place. So, in the last 18 months, 2 years, we have put our data into our own data warehouse. Every data source that we can muster is now centralised and we have produced dashboards and it is much more coherent and easy to understand. You will see that in some of the updates on our website because we publish that regularly as well. How we share that is we work with Ian Cope and his team at Stats Jersey. We share that data with them, he critiques with us our target setting every year as well. He is on our working group for setting targeting. He is a good subject matter expert, to be honest, to help us with how we are collecting data and what is right. I do feel, and I have said it many a time, that I find, and industry finds, it quite challenged that Visit Jersey is, industry would say: "Sometimes marking my own homework", because I am producing the exit survey, Visit Jersey is, and then publishing it. I do think there is an opportunity to take stats out of the Tourist Board's responsibility. If you look at other jurisdictions, like Britain or Ireland or Scotland, they are run by Office of National Statistics in the U.K. (United Kingdom) or the same equivalent in Ireland. I do find that it would live better separate to Visit Jersey.

Deputy I. Gardiner:

Quick question about visitors' numbers, together with the Ports of Jersey. I think they have it. So, do you have exactly the same numbers? If I would go to Port of Jersey and I would go to Visit Jersey, would I find the same visitor numbers on the Island? Can I compare? Let us speak it as it is because ...

Chief Executive Officer, Visit Jersey:

Yes, I will. I will try and explain. The raw data is the same. So, airline data, ferry data, and that comes from Ports, and Ports give us the harbour data because they have the software. The airline data comes via Ports as well from the airlines. So, that is the raw data. What Ports are doing is they are measuring outbound and inbound. Visit Jersey is just measuring inbound, because I am worried about visitors to Jersey.

Deputy I. Gardiner:

Yes. How are you separating residents from tourists and also business travel and …?

Chief Executive Officer, Visit Jersey:

Yes. Business, V.F.R. (visiting friends and relatives), et cetera. Part of the exit survey is that survey that you will have seen at the airport where the ladies are asking questions. They will ask you if you are a resident or not. If you are a resident, move on. If you are a visitor, they will then ask you questions. We survey about 40,000 people a year at the airport. That is where we are asking the questions: “What is the purpose of your visit? Are you visiting friends and relatives? Are you here for business? Are you here for leisure?” That is how that is decided. Then that 40,000 sample, the algorithm is weighted, and that is how we work out the portion of visitors that have travelled for leisure, business, visiting friends and relatives, et cetera.

Deputy R.S. Kovacs:

The creation of Visit Jersey was recommended in a 2014 report by the Tourist Shadow Board, aiming to come to replace the failing States tourist department model, which was put there to halt the decline in visitor numbers. In 2024, 2025, we still see a decline in those numbers, raising the question: how effective do you think the organisation’s purpose, originally set up in 2014, is today?

Chief Executive Officer, Visit Jersey:

Yes. It was definitely the right decision. I was not here, obviously, but it was definitely the right decision to move Visit Jersey to an arm’s length organisation. The challenge has been that it did start to turn the tides, if you look at the numbers. With the inception of Visit Jersey, the numbers started to grow. Then we hit the pandemic in 2019. In 2019, we were about 770,000 visitors, so we were definitely on the right trajectory. Then of course COVID hit and everything went as it did. I arrived in 2023, midway through, and our 2023 numbers were up, our 2024 numbers were up. It is this year when the decline is starting to creep in. The challenge for that is issues beyond our control. We had the transition of the ferry operation, which has lost us a significant number of passengers. We have had reputational damage and thereby cancellations from Blue Islands, and you have the economic situation of the planet. What I would say to you is, when you look at what we are competing with out there in the market for visitors who have got choice, and customers who have got choice on where to visit, we have to be on that consideration list. I know our grant looks high but it bears no relation to other similar Island destinations that are punching way above our weight in terms of getting visitor recognition and bookings.

Deputy R.S. Kovacs:

In the same report, the board was saying: "We have to come to the view that there is significant potential for growth in tourism. Given the approach we are recommending, we believe Jersey can be the destination of choice for a million visitors a year within 15 years." So, 10 years in, are you still on course to reach 1 million annual visitors?

Chief Executive Officer, Visit Jersey:

No. Let us see where we end up this year but I think it will be closer to half a million visitors by December, give or take. A couple of things have happened since then. We have had quite a lot of exit of accommodation on the Island since the inception of Visit Jersey. The bed stock that we were used to having is not the same level anymore. On 3rd December we have a board strategy day where we are going to set out the next 3 to 5 years in terms of what we really think those targets should be based on where we are at and what we have in terms of inventory on the Island. Then also making Jersey the most attractive place we can with what we have got. Some of the investment in infrastructure that is coming down the pipe is all very well, the trouble is a visitor wants it now, they do not wait 5 years. We would love to see some of these hotel planning proposals going through faster so that we can get bills moving so that we can start to showcase a more vibrant destination.

Deputy R.S. Kovacs:

In your opinion, what action so far has had the biggest positive impact in growing visitors?

Chief Executive Officer, Visit Jersey:

Since inception?

Deputy R.S. Kovacs:

Yes.

Chief Executive Officer, Visit Jersey:

I would probably say connectivity is always king. If you cannot get to an island, there is no point trying to market it. We have had a lot of wins with British Airways and easyJet. EasyJet coming in to fly here at the frequency that they do, and from the gateways that they do in the U.K. is phenomenal.

Chair, Visit Jersey:

And Jet2 more recently.

Chief Executive Officer, Visit Jersey:

Jet2 is now extending its flying next year. It is going to fly 3 weeks earlier and 3 weeks later, so pushing into that shoulder season where we have got bed space. Connectivity has been really strong. On the campaign side, when I look at the marketing metrics of how we are delivering potential visitors to our website, and the referrals we are pushing on, because that is one of our measures, we push referrals to our hotels and attractions so we can monitor that, it is increasing. Now you have got to ask yourself: “Why are we not converting?” That comes down to: “Are we getting enough eyeballs through?” But once we get them to the website, why are they not converting? Some of that comes down to value for money. We are not a cheap destination. When you compare us to other opportunities in warmer climes, or even other cities, we are more expensive.

Mr. V. Khakhria:
I have just done a quick search on some inbound tourism numbers for Guernsey, the U.K. and France, being relatively useful comparators, if not scientifically exact. In each of these jurisdictions since 2022, each of these jurisdictions have had significantly increasing tourist numbers over 2022, 2023, 2024 and 2025 to date. The U.K., for example, and the U.K. has had its fair share of problems, has gone from 31 million inbound passengers in 2022 to 38 million in 2023, 41.2 million in 2024, and year-end forecasts to 44 million in the U.K. France international visitors have gone to more than 100 million visitors, up from 2022, 80 million. These are big increases. Are you suggesting then that the decline, from 700, I think you said, people when ...

Chief Executive Officer, Visit Jersey:
777 pre-COVID.

Mr. V. Khakhria:
Well, from when you joined in 2023, what were the numbers?

Chief Executive Officer, Visit Jersey:
No. It was not 777 then. It was 527.

Mr Khakhria:
So, 527 and we are going to be lucky to hit 500 this year?

Chief Executive Officer, Visit Jersey:
Yes.

Mr Khakhria:
So, zero growth, marginal decline. You are attributing that to value for money and loss of connectivity?

Chief Executive Officer, Visit Jersey:

I am attributing that to, yes, value for money. Also, honestly, we have lost, when you look at the actual detail of the numbers, it comes down to about 100,000 visitors and the majority of that is French inbound on the ferry. A portion of that is air, but the majority we have been hit by the ferry. If that business had come in, I would have expected our number to be closer to 600, 620.

[14:30]

Deputy I. Gardiner:

Is it day trippers?

Chief Executive Officer, Visit Jersey:

Mix. It is a lot of day trippers, but there is probably about 30 per cent are overnights in France.

Mr. V. Khakhria:

Are you able to give us a feeling, we may have to follow this up in writing, but the exact ferry numbers of day trippers and longer stay?

Chief Executive Officer, Visit Jersey:

Yes, I can. I have not got it here, but I can.

Deputy I. Gardiner:

That would be useful, thank you.

Mr. V. Khakhria:

You mentioned Blue Islands, but I am just presuming that the Blue Islands impact will not have been seen in any of the numbers you were showing us?

Chief Executive Officer, Visit Jersey:

Not yet. But I will tell you what has happened. We have had cancellations. They went technical quite a few times due to aircraft technicalities and, as you may know, they are not bound by the E.U. (European Union) for compensation as well because they are registered in Guernsey, so the customer does not get any refunds, or the customer service was pretty poor. We have seen a lot of cancellations on Blue Island because people do not trust it and do not want to fly anymore. The reputational damage, when you are considering a destination, is an important factor.

Deputy D.J. Warr:

So, 2 questions really. One was around the shape of accommodation. That sounds like a weird term. Do we have the mix right in Jersey? We have just seen … Strive was turned down, but what about the mix with Airbnb? There is tensions with housing, et cetera. Do we have the right supply, is probably what I am asking you?

Chief Executive Officer, Visit Jersey:

It is a big question, and it is one I think that, sadly, you cannot change quickly. But I think where we came from, when you look back, is we were an Island that had a plethora of accommodation of all kinds, B&B, 2-star, 3-star, 4-star, self-catering, you name it. A lot of that stuff did exit due to the tiny numbers, financial reasons, economic reasons, whatever. Where we are now finding ourselves, still to be validated really, but because I do not think we have locked and loaded that, it is part of the strategy today as well. But the discussion we are having between Government and ourselves, and the economic department is if we are a destination that is never going to be the cheapest, it is a premium destination, therefore, the stock that we should have should play to that customer and that segment. We are doing segmentation work as well at the moment, refining it, because we always look at our segments. I would say that where we need to be, a couple of things. We could do with more stock in the upper end 3 and 4-star market, but also we need brands. When you look at Jersey, we have the Radisson and we have Premier Inn. Those are the only brands on the Island. Typically, they trade very well, because they have international distribution, they have brand recognition, customer knows them. The majority of the rest of the beautiful accommodation we have is owner managed by families who are not necessarily attuned to any particular international affiliation. That holds us back, I think. When a customer is coming here, first thing they do is: "Where are we going? Are there some big brands in town?" Because then you have got consistency of what to expect as well: "I am going to go and stay in a Marriott. I am going to stay in a Radisson." We have to explain ourselves, go a different route, to get across the message. If you have been to Jersey, it is not a problem. Our net promoter score is 74. I mean, it is ridiculous. It is so high. It is wonderful. It is fantastic. Once you get here, they are sticky and they want to come back, and they will talk about us. But getting awareness across to somebody of why you should come to Jersey (a) down to the product and (b) the money with which to talk and market that is a challenge.

Deputy D.J. Warr:

Just one final question, very quickly. I was meeting a hotelier at lunchtime today who talked about the decline in the German market. Can you explain a bit about that, what has happened there?

Chief Executive Officer, Visit Jersey:

If I go back longer than me, but the German market, we have very little scheduled business from Germany. We have seasonal flights with Eurowings and Air Dolomiti from Munich and Dusseldorf in the summer, but they are weekly. The market that we did have a lot of pre-COVID was the charter market. And with COVID, the charter market just decimated. At best, probably about 7 per cent of our arrivals were German. But that dropped right down to one, 2 per cent. I am happy to say that we went out to Germany and Switzerland beginning this year. I went with J.H.A. (Jersey Hospitality Association), and we went to meet those charter operators, tour operators, and discussed about: "Please come back to Jersey", basically. They all negotiated with Blue Island and brought those charters back in, which I am currently managing the reality of that, because now those flights are not going to come. But the numbers are up for Germany. But now, unfortunately, they might go down again. Germany is the only growth market this year.

Chair, Visit Jersey:

Seven per cent up this year.

Deputy R.S. Kovacs:

What guidance has the Government given you about the long-term visitor strategy and is that consistent? Or, in other words, how you have contributed to the delivery of the Visitor Economy Strategy, with clear examples?

Chief Executive Officer, Visit Jersey:

The Visitor Economy Strategy was co-created with industry, Government and Visit Jersey. In there, as you know, there are objectives that apply to the whole visitor economy. Sadly, there is a lot of stakeholders in the Visitor Economy Strategy and they are not necessarily down just to Visit Jersey. The one that we can own that is in the Visitor Economy Strategy is international awareness of Jersey, brand awareness of Jersey. That sits very squarely in the marketing pot. That is where we are owning, trying to build that awareness and attraction of Jersey to bring visitors in. I think that the commitment by Government to the Visitor Economy Strategy is a challenge. In all honesty, when you read that document, it tells you everything you need to know about what we need to do to put this show on the road and to make Jersey a vibrant, great place to live, work, invest, play. It needs money, it needs commitment, and we are in the queue. We appreciate the challenges for Government, but the money that is required to deliver the outcomes of the Visitor Economy Strategy, and the plan alongside that, is not evident.

Deputy R.S. Kovacs:

So, from that strategy, what would be your 3 main priorities that you would implement?

Chief Executive Officer, Visit Jersey:

If I had a magic wand, accommodation, get some of these planning approvals through, cut the red tape and make it more agile and faster to sort of get business ready to ...

Deputy R.S. Kovacs:

What is the biggest red tape you see?

Chief Executive Officer, Visit Jersey:

I think it is the Government processes and planning certainly is a huge one we get back from industry. I am personally not living it, but the hotels, when I look at Millbrook and Strive and the other projects that have gone through. I have been here 2 ½ years and some of these people are waiting 5, 6, 7 years to get their plans through. That is not going to help our economy at all.

Deputy R.S. Kovacs:

In relation to your annual report and accounts from last year, can you advise what you feel was the most significant risk that Visit Jersey is facing from that list?

Chief Executive Officer, Visit Jersey:

I have to get my risk register to hand.

Chair, Visit Jersey:

Insufficient funding and competition, withdrawal of the B.B.S.P. funding because the core grants has not changed since the inception of Visit Jersey. We have been here since 2015, the core grant has not changed. So, in real terms, it is probably half of what it was at the outset core grant.

Mr. G. Kehoe:

It would be 7 million now.

Chair, Visit Jersey:

If we had allowed for inflation, it would have been about 7 million, 7.5 million. So, insufficient funding and competition, withdrawal of B.B.S.P. funding because we are back to the core grant, which would not address the issues of awareness that Tricia has alluded to. The effects on the industry of the living wage and obviously we talked about, in one way, the only option we have as an Island is to be a premium offering because we have got that relatively high cost base, not only being an Island but also the living wage. Connectivity obviously. Tricia was making it really clear that the Jet2s and the easyJets and the British Airways have got plenty of choices. Unless they are seeing load factors well into the 70s, and if you look at the annual results of some of these airlines, they are seeing load factors much higher than that, then they will just shift the resource elsewhere. So, that is a big risk.

Deputy R.S. Kovacs:

So how does the risk compare with what you see in other destinations?

Chair, Visit Jersey:

Well, it is utterly performance related. As you start to see some of the challenges we have seen in 2025, then the airlines will be looking at that and thinking: "Are we better off putting that resource elsewhere and developing better returns?" It is a very unemotional process. I used to run it at B.A. It is a very unemotional process, very clinical process. Some of the airlines will make longer term commitments. What we are seeing is Jet2 are making some long-term commitments, which is great. Others are much more relaxed about moving capacity, more flexibly. We have got to do everything in our power to continue to market the Island so we fill the airlines and the ferry.

Chief Executive Officer, Visit Jersey:

I think what you are asking is how do we compare to other destinations? I was just recently with the C.E.O. of Tourism Malta, and also Madeira, and quite interesting, because I like talking to other Island nations. Comparing us to Spain and France is lovely, but France is the most popular country in the world to visit and spends gazillions on marketing I can only dream of. If I look at other Island destinations, they are putting significant investment at pace into their infrastructure, into their attractions, into their events, and into their marketing. We are not.

Deputy R.S. Kovacs:

How do you report risk to the Government, and how do you manage disagreements about risk levels?

Chief Executive Officer, Visit Jersey:

We have a quarterly partnership meeting with the economic team and on that we produce a risk register. Sorry, what else was the question: "Risk register and"?

Deputy R.S. Kovacs:

How do you manage disagreements about the risk levels?

Chief Executive Officer, Visit Jersey:

Yes. We have mitigation. So, we list our risks, then we do a R.A.G. (Red, Amber, Green) rating on them, and then we review them. I review them monthly with my leadership team internally and we move them up and down accordingly as we see that changing. Then we take that to the board meetings and also to the quarterly partnership meeting.

Deputy D.J. Warr:

Just one very quick question. One thing on the risk register I noticed you did not put on there was staffing. Obviously getting people into the hospitality industry is very challenging at the moment. You have not mentioned that on the risk, so therefore presumably you do not see that as a risk for hotel development for people investing in the Island because they cannot get people to work for them?

Chief Executive Officer, Visit Jersey:
I think it is a miss, because it is on my S.W.O.T. (strengths, weaknesses, opportunities and threats) analysis in my business plan. I think attractiveness for hospitality staff is a challenge and staff accommodation, and it is an omission. I apologise. It should be on the risk register.

Deputy R.S. Kovacs:
We will talk a bit about the grants part, given this year it is a bit of larger core grant. What does that allow you to deliver extra and how do you measure the impact of the extra funding?

Chief Executive Officer, Visit Jersey:
It is split into several areas. One is route marketing as distinct from route development. Ports of Jersey have a route development budget from the B.B.S.P. fund of 1 million for 2025, and 1 million for 2026, and we have 2 million for 2025 and for 2026. The ring fence of that money is that anything for route marketing should be for southern flying, trying to develop air links into Europe, because we have got pretty good connectivity north into the U.K. but, as you know, very little air connectivity, a bit of seasonal. It is all about trying to grow that business into Europe. The other big portion of it then would be for the "Bergerac" production. That is for series 1 and for series 2, which straddles 2025 and 2026. Then there is some other money in there, which is for targeted marketing to promote "Bergerac" and the Jersey Tidal Trail.

Deputy R.S. Kovacs:
From these projects, like route development, "Bergerac" and others, which deliver the strongest return?

Chief Executive Officer, Visit Jersey:
Those 3. Well, it depends on what timespan. But in immediate terms, if you are talking about now, it would probably be in the route marketing department where you see the fastest reaction to your work. If you launch the flight and you put money behind marketing it, you can track the passengers and the load factor and the marketing metrics alongside that. That would be the fastest.

Deputy I. Gardiner:
We might follow up with some more written questions. I am just mindful of the time.

Deputy D.J. Warr:

In 2018, the Comptroller and Auditor General completed a report into Visit Jersey and listed 16 recommendations for Visit Jersey. Can you advise P.A.C. (Public Accounts Committee) where you are with these recommendations? That is a big long list.

Chief Executive Officer, Visit Jersey:

Yes, it is. Martin has got this. We have got quite a few that have been completed. How do you want me to respond?

Deputy I. Gardiner:

Just mention 2 or 3 and we will write really and get a written response.

[14:45]

Chief Executive Officer, Visit Jersey:

It was talking about: "V.J. (Visit Jersey) updates Government with its reserve level at the quarterly meeting. Agrees on a carryover." That was an action we were asked to do: "Carry out a formal job evaluation exercise prior to the recruitment of the next chief executive." We did it. We outsourced it to a U.K. specialist for me. "Annual schedules align with goals, priorities and K.P.I.s." Yes, we are doing that. "Working with States using external expertise to challenge the robustness of approach to deriving R.O.I.s. Appointment of a data analytics manager. Deliver the data warehouse." Then Stats Jersey working with us on our stuff. So, I think there or thereabouts.

Deputy D.J. Warr:

In the report, the Comptroller and Auditor General states: "I have, however, identified scope for improvement in a number of areas and made recommendations accordingly. I am also concerned that the reasons of ongoing funding for Visit Jersey do not flow directly from the States strategic objectives and there is limited evidence of robust and effective challenge by the States of Visit Jersey's targets and performance." Can you advise P.A.C. what you have done to make sure you align to States strategic objectives?

Chief Executive Officer, Visit Jersey:

Yes, I can. When we produce our business plan, and the 2026 one has just gone in, for example, we make sure that aligns with a few things. The Common Strategic Policy, the Future Economy Plan, the Visitor Economy Strategy. So those are our guides and then out of that falls Visit Jersey Business Plan, making sure it ladders up to those. That is all detailed in the business plan. But I could share that with you if you ...

Deputy D.J. Warr:

Thank you. So, going forward into the future, to what extent do you see the role of Visit Jersey being updated? Can you advise P.A.C. if you think Visit Jersey should remain a separate A.L.O., or is there room for amalgamation with other A.L.O.s or S.O.E.s (state-owned enterprises) that have similar areas such as Jersey Business or Ports of Jersey?

Chief Executive Officer, Visit Jersey:

My answer for this one would be something that I do not know if we can attain, but it would be my dream for what is best for the Island. I think that when you look at Jersey off-Island, I spend more of my time worrying about trying to get people here than being here. I am in the U.K. a lot and a fair amount in France. The brand of Jersey, and even back to Island identity, is not high enough, even in the U.K. You all know it yourselves if you travel. You have either got somebody who has been here so they know it backwards or they have no clue, and you are going: "My goodness." One of the main phrases is: "Why have I not been to Jersey?" It is not even in the awareness zone. I do think … and my previous role was working for VisitBritain. I was based out in the Gulf looking after Asia Pacific. But I must admit, the way that Britain runs marketing for Brand Britain is one central marketing device, if you like, and it is called the Great Campaign. Some of you are familiar. Then whoever you are, whatever sector, automotive, aviation, healthcare, you all fold in under the one brand, and that is the brand that you take to market overseas and domestically. So, one-size-fits-all. When I arrived in Jersey, and I see this plethora of lots of brands and stuff, the 2 brands that really talk off-Island at the moment are only Jersey Finance and ourselves. There is a real missed opportunity, I think, to take Brand Jersey on the road. Now, as to who would run it, you would expect me to put my hand up, I suppose, as the marketeer in the room, but I think you could. Lord only knows how long it would take us, because we need agility, speed, and courage to do that.

Deputy R.S. Kovacs:

How would you see this amalgamation work? Which parts to do what in an amalgamation?

Chief Executive Officer, Visit Jersey:

I think you could call it like an enterprise agency, I suppose that you would have a centralised marketing function, brand guidelines for that entity and then people would fit in underneath it. I do not know that all my other A.L.O.s might agree with my theory here, but I am just talking about how do you put a destination on the map globally? I am only talking about tourism. But if you are talking about how we really leverage Jersey on the global stage, then I think we could work in a less siloed fashion.

Deputy I. Gardiner:

Thank you very much for your answers. The public hearing is closed.

Chief Executive Officer, Visit Jersey:

Thank you very much.

[14:49]