



Locumconsulting
creating successful destinations

Marketing Jersey

Organisation Plan. Final Report - Version 4
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1. Introduction

This paper outlines the form of a new Private-Public Sector Partnership organisation that will be responsible for the promotion of Jersey and other functions related to the enhancement of the visitor economy.

The paper has been commissioned by the States of Jersey in response to an initiative in late 2005 by the Jersey Hospitality Association.

It is also a response to feedback to Locum, when they were undertaking an audit of tourism in Jersey in 2006, that new organisational arrangements would be welcomed by both the private and public sector.

This is a fourth draft of this report.

The first was in the form of a discussion paper and was issued to the Jersey Hospitality Association for comment, which they did.

The issues were subsequently discussed at a meeting at Jersey Airport on 25 June which was attended by Mike King and Kevin Lemasney of the Economic Development Department of the States, and Gerald Fletcher and Robert Jones representing the Jersey Hospitality Association.

Both the JHA response to the discussion paper and discussion at the meeting suggested that there was a considerable measure of agreement on the broad principles.

A fresh draft was presented by Locum which provided more flesh on the bones of what the PPP could be like. David Geddes of Locum discussed this with Robyn Lapidus and Gerald Fletcher of the JHA at a meeting on 1 August 2007. The JHA then formally responded to the second draft.

A third draft responded to JHA's comments and questions and contains a record of that response.

The final draft was discussed at a meeting between representatives of the Economic Development Department of the States (Mike King, Kevin Lemasney and David de Carteret) and representatives of the Jersey Hospitality Association (Robyn Lapidus, Robert Jones, Malcolm Lewis, Gerald Fletcher), chaired by David Geddes, in St Helier on 5 September 2007.

This confirmed that there was agreement in principle between executives on the form of the organisation, and it would now be put to the States and members of the JHA for ratification.



2. Key Principals of proposed agreement between JHA (representing the private sector in the visitor economy) and the States

- The new organisation will be a Public Partnership that is independent and controlled by an independent board of directors.
- It will have discretion over the staff it employs.
- The States will commit funding on a rolling three year basis.
- There will be a private sector membership scheme in two categories - corporate and visitor economy. JHA will encourage the private sector to take membership of the new organisation and the objective will be to persuade most organisations involved in the visitor economy to take membership.
- JHA will exist in parallel with the new organisation initially but will formally review the situation no later than 2011 with the expectation that, provided the new organisation proves to be fit for purpose in advancing the interests of businesses involved in the visitor economy, it will merge into the new organisation.
- Until 2011, the Chair of the JHA will be entitled to a seat on the board of the new organisation. The situation will be reviewed by the Board of the new organisation in 2011.
- The new organisation will have responsibility for destination marketing activities. JHA will cede destination marketing to the new organisation, but will receive grant in aid from the States to cover lost income. This will be committed until 2011 and reviewed then.
- JHA will retain primary responsibility for Quality and Skills, working in partnership with the new organisation.



3. Outline of Possible New Organisation

3.1 Objectives

The organisation, provisionally called Marketing Jersey, will be a cross-sectoral private-public sector partnership that is responsible for:

- Managing the Jersey brand and improve the image of the island as a place to visit, to invest in, and to purchase goods and services from.
- Marketing the island as a visitor destination in leisure and business markets.
- Taking a lead in improving the quality and attractiveness of the visitor offer.
- Developing an events and festivals programme that enhances the quality of life of local people and attracts visitors to the island.
- Providing information and other services to visitors.
- Representing the interests of those involved in the visitor economy.

3.2 Organisation

The organisation will be a non-profit making company limited by guarantee.

3.3 Funding

Core funding will be provided by the States of Jersey, which will transfer resource that it currently invests in tourism.

The level of funding will be guaranteed on a three year rolling basis (i.e. the organisation will know what funding it was receiving from the States or the following three years).

After formal agreement in principle to the new organisation, there will be a period of detailed business planning. That, in conjunction with the budget planning for 2009, will establish the initial budget and funding arrangements for the new organisation for 2009, 2010 and 2011. The States will commit that funding and it will last for three years (assuming the board of the new organisation wishes it to). The funding will be extended by a year in 2009 and so on.

Some staff might be seconded to the new organisation initially.

The Chief Executive and Board of the new organisation would have full control over staffing.

There will be a membership scheme for the private sector. The details are to be finalised after there is agreement in principle to the new organisation.



It is envisaged that there will be two categories of membership: **Corporate** and **Visitor Economy**.

Corporate membership will be open to all organisations with an interest in the quality of life in Jersey and the image of the island.

There will be categories to reflect different levels of contribution and benefit.

Visitor Economy membership scheme will be aimed at individual shops, restaurants, accommodation providers and visitor attractions.

Membership will include entitlement to certain core benefits e.g. listing in official visitor information and on the Jersey web site.

The aim will be to make membership affordable, knowing that many businesses in the visitor economy are small and have been struggling as traditional tourism has declined on the island, but also to demonstrate a commitment to the new organisation by the private sector¹. It is recognised that the contribution from the States is likely to form a large proportion of the funding for the foreseeable future.

Only members will normally be featured in marketing activity undertaken by the organisation.

In addition, the organisation will generate funding from commercial activity that is in accordance with its core objectives, in particular from the development of marketing campaigns. It will not undertake commercial activity in competition with the private sector.

3.4 Name

The proposed name is Marketing Jersey².

3.5 Governance

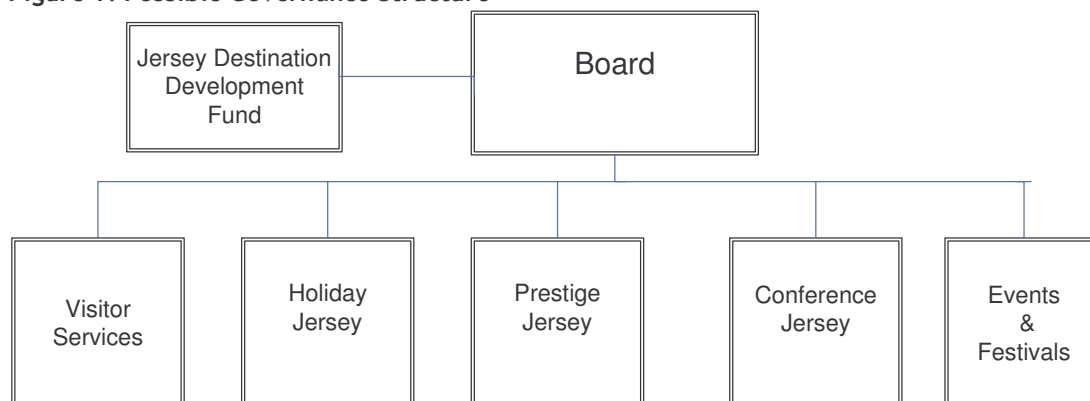
It is envisaged that there will be a main board with a number of executive committees reporting to it.

¹ The JHA has volunteered to propose a schedule of membership fees that it thinks would be sustainable.

² We originally suggested Destination Jersey but, given the cross-sectoral nature of the proposed organisation, Marketing Jersey might be slightly more appropriate. The name of the organisation is a relatively insignificant issue.



Figure 1: Possible Governance Structure



The Board

The Board would be responsible for:

- Strategy. Business and Development Plan.
- Leadership in co-ordinating major improvements to the destination experience.
- Co-ordination of cross-sector Jersey image-building activity.
- Approving the annual plans of each of the executive groups.
- Financial management.

The Board will have a balance between those who are independent, with particular skills that are relevant, and those that have direct experience of the issues. It will have two representatives of the States, a senior officer and an elected representative.

The Board could meet four times a year, probably more in the year before the organisation comes into being (as a Shadow Board) and the first year of operation.

Figure 2: Possible Board Composition

-
- 1 Chair - Independent
 - 2 The States - Senior Elected Representative
 - 3 The States - Senior Officer
 - 4 Chair of the Prestige Jersey Group
 - 5 Chair of the Conference Jersey Group
 - 6 Chair of the Holiday Jersey Group
 - 7 Chair of the Events and Festivals Group
 - 8 President of JHA.
-



-
- | | |
|----|-------------------------------------------------------|
| 9 | Senior manager of leading non-tourism related company |
| 10 | Independent with marketing experience |
| 11 | Independent with financial management experience |
-

The Chief Executive will attend board meetings (and may have a vote). Other managers will be invited to attend when items that are relevant to them are being discussed.

The Executive Groups

The Executive Groups would be responsible for:

- Developing, with the relevant staff, the annual plans for their section.
- Overseeing the delivery of those plans.
- Addressing current issues within their remit.

They would be made up of individuals with relevant technical skills and responsibilities (e.g. members of the Marketing Group would typically be marketing managers) from organisations that have a particular interest in the particular activity.

They could meet monthly or 6 weekly.

Possible initial executive groups and their remit are:

Figure 3: Remit of Executive Groups

<i>Executive Group</i>	<i>Remit</i>
Visitor Services Manager responsible: Visitor Services Manager	Provision of information to visitors when they are seeking it prior to arrival and once they are in Jersey. In particular: <ul style="list-style-type: none">• Tourist Information Centre.• Gateway information points/desks.• Call centre.• Destination Management System.• Visitor Information Points.• Guide services.
Holiday Jersey Manager responsible: Marketing Manager	Persuading people to take holidays in Jersey in traditional holiday accommodation. In particular: <ul style="list-style-type: none">• Promotional, media and internet activity aimed at



<i>Executive Group</i>	<i>Remit</i>
	attracting visitors who live in main target markets, especially the UK. <ul style="list-style-type: none">• Work with major travel trade operators and transport companies.• Development of collaborative activity between operators that are particularly focused on the traditional holiday market.
Prestige Jersey Manager responsible: Marketing Manager	Persuading people to take short breaks in Jersey in four star plus hotels. Business, Niche and Event Led Tourism related to this market. In particular: <ul style="list-style-type: none">• Promotional, media and internet activity aimed at attracting visitors who live in main target markets, especially the UK and other markets served by direct flights.• Development of collaborative activity between operators that are particularly focused on premium short breaks.
Conference Jersey Manager responsible: Conferences Manager	Attracting meetings and conferences. In particular: <ul style="list-style-type: none">• Sales and marketing activity aimed at conference organisers.• Bookings system.• Identifying and attracting “footloose” conferences organised by professional associations etc.
Events and Festivals Manager responsible: Events & Festivals Manager	All issues relating to the organisation of festivals, events and animation activities on the island. Including: <ul style="list-style-type: none">• Development and organisation of festivals and events• Attracting “footloose” events• Providing advice and support to events organisers.

Other possibilities for executive groups include one for Genuine Jersey and others covering town centre management for specific areas (e.g. St Helier, Gorey, St Aubyns).



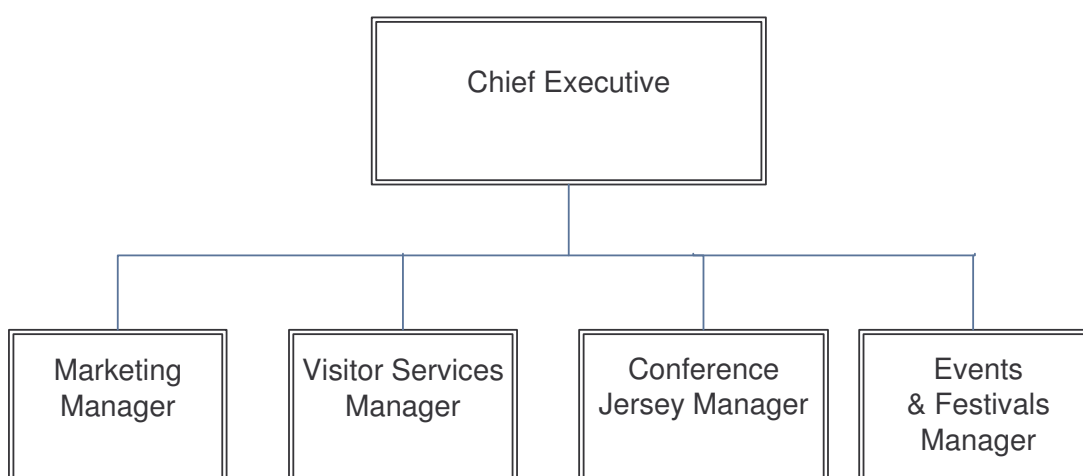
Jersey Destination Development Fund

In addition, it is envisaged that there is a committee of the Board that administers the Jersey Tourism Development Fund. It would include the chief executive.

3.6 Management

The following are the key management positions envisaged:

Figure 4: Proposed Management Structure



Chief Executive

Reporting to: Board.

Functions:

- Overall strategy and planning.
- Campaigning for improvements to the visitor experience.
- Projecting a positive image of the island in local and international media.
- Financial control and budgeting.
- Administering the work of the Jersey Destination Development Fund.

Marketing Manager

Reporting to: Chief Executive

Functions:



- Marketing Strategy and Plans.
- Brand awareness campaigns.
- Promotional campaigns.
- Marketing of Events.
- Communications with members and potential members.
- PR.
- Securing sponsorship and advertising revenue for vents and marketing material.
- Working with the Holiday Jersey and Prestige Jersey Executive Groups in delivering their objectives.

Events and Festivals Manager

Reporting to: Chief Executive.

Functions:

- Supervising the organisation of events run by the organisation.
- Liaising with promoters that wish to stage events on the island.
- Attracting “footloose” events to the island.
- Providing advice and assistance to local event organisers.
- Working with the Events and Festivals Executive Groups in delivering their objectives.

Conference Jersey Manager

Reporting to: Chief Executive

Functions:

- Managing the Conference Bureau.
- Developing Marketing Campaigns aimed at attracting conferences and exhibitions to the island (working with the Marketing Manager).
- Working with the Events and Festivals Executive Groups in delivering their objectives.

In addition, the organisation is likely to require a Finance Officer and a Membership and Administration Officer in addition to staff working under each of the managers. The total staff complement is envisaged as being in the region of 20, although it may be more or less than this as resources dictate and in accordance with the preferences of the Board.



4. Implementation

The following is the proposed implementation timetable:

<i>Timing</i>	<i>Action</i>
2007	
Sep - Nov	"In principal" proposals put to the States and to the members of JHA for formal endorsement.
Oct-Dec	Detailed business plan and assessment of legal and HR issues.
2008	
Jan	Detailed proposals endorsed by the States and by the JHA. Chairman appointed.
Mar	Shadow Board meets. Recruitment process for chief executive starts.
Jul	Chief executive commences work.
2009	
Jan	New organisation comes into being.



Appendices



1. Some Issues

1.1 Form Follows Function

There are many different types of organisation that are responsible for the management and marketing of destinations that Jersey could learn from.

Ultimately, however, its circumstances are unique and it needs to work out what needs to be done and what is the most effective way of doing it.

The circumstances in Jersey are unusual. It is like a country, but with a population smaller than most large towns. Although tourism has declined in relative importance to the local economy, tourism is still of disproportionate importance, especially in terms of the amount of employment it sustains directly and indirectly. It is also important in sustaining services, such as flights, that are critical to the quality of life of locals and to other sectors of the economy.

There has been much change in the past decade or so in the way cities, sub regions and regions in the UK (and across Europe) organise marketing, visitor services, city centre management, events and other functions that relate to the visitor economy.

Often some or all of these functions have been divested to some form of non-profit private-public partnership organisation with a mixed private sector/public sector board

There are some examples where the local authority employs the staff and provides the office and administrative infrastructure, but operates in other respects as a participatory partnership - New Forest Tourism is a particularly good example and is highly regarded.

Jersey could alternatively create a tourism organisation that mimics the regional tourist boards in England. They are, essentially, public-private partnerships with membership schemes. Their main role is to represent the industry, undertake marketing activity and research, and provide services to members such as training and commercial offers. They sometimes also manage tourist information centres.

There have been big changes in England since the government gave responsibility for tourism strategy to the regional development agencies in 2003. The main feature has been a transfer of primary responsibility for tourism from the tourist boards to sub regional partnership organisations. All of these new partnership organisations are non-profit making companies limited by guarantee. In most cases, staff are employed by the company. Sometimes a few of the staff may be on secondment from local authorities.

In many cases, a destination-marketing organisation originally set up within a city has taken over responsibility for tourism marketing and services for the rest of their sub-region. This is true, for example, of Experience Nottinghamshire (previously Experience Nottingham), The Mersey Partnership, and Marketing Manchester.



Within these general trends however, there is no single accepted template for city or regional marketing and management. Almost every destination management/marketing partnership has arrangements and functions that are different from everywhere else.

At one end of the spectrum are loose partnerships and forums that bring together stakeholders to discuss and co-ordinate activity.

There are also some area-based tourism marketing organisations that sit over and above the activity of the local authority/ies. West Sussex Tourism, for example, has funding from the local authorities in its area, but otherwise works independently of them, organising its own marketing campaigns.

At the other end of the spectrum is CV One in Coventry, an independent public-private partnership that manages all aspects of the management and marketing of the city centre. This includes managing Council-owned car parks, events, the tourist information centre, and all aspects of marketing the city to locals and outsiders alike.

Leicester Shire Promotions is similar. It is responsible for city centre management in Leicester, as well as tourism information and marketing for the districts in the rest of the county. Again, it is an independent company limited by guarantee.

Some also include Economic Development and Inward Investment. The Mersey Partnership, for example, is organised into three divisions based on tourism, economic development and inward investment. LeicesterShire Promotions is similar.

Trade Associations do sometimes exist within areas that have these destination management/marketing organisations. For example, there is a grouping of hotels in the north of Greater Manchester called the M62 group that promotes the interests of the hotels in that section of the region and is affiliated to Marketing Manchester, the regional destination marketing organisation.

On the whole, however, businesses involved in the visitor economy see the main destination marketing/management organisation as their representative body. Symptomatic of this, in Bristol, the long established Bristol Hotels Association is probably going to merge into the city's DMO, Destination Bristol.

Recommendation: there is no single best practice template that Jersey should simply emulate. It should instead work out what it wants to achieve and what form of structure is best likely to deliver that. There are, however, clear trends that seem to represent current best practice. They include bringing together destination brand management, tourism promotion, town/city centre management and marketing, and events management into an independent partnership organisation.

Our view is that kind of thing is probably most appropriate for Jersey.



Figure 5: Case Study, Göteborg & Co



Göteborg & Co is widely recognised to be one of the most effective destination management organisations in Europe.

Its activities are primarily aimed at enhancing the life quality of people living and working in Sweden's second city, Göteborg.

Göteborg & Co's task is to market and take part in developing Göteborg and the west of Sweden as a tourist, congress and event destination.

Göteborg & Co's Trade & Industry Group aims to help develop Göteborg into one of Europe's most pleasant and attractive urban regions to live in, work in and visit.

The company is owned by:

- The City of Göteborg
- The Göteborg Region
- West Sweden Chamber of Commerce and Industry
- Liseberg
- Got Event
- Stena Line
- Swedish Exhibition Centre
- The association of large hotels
- The Friendly Family hotels association
- CityFöreningen Trade Association.
- Göteborg Restaurant Association

Its **vision** is to make Göteborg

'One of Europe's most pleasant and attractive urban regions to live in, work in and visit'

by collaboration, active involvement, high quality products and comprehensive solutions.

It has three key business areas: Business Travel, Leisure Travel and Event Collaboration,



plus a Trade and Industry Group.

Four service units provide various services to the operating business areas and Trade and Industry Group: Media Centre, Visitor Service, Research & Development and Finance, Legal Affairs, Administration and IT.

See here for organisational plan

<http://www.goteborg.com/templates/FullPage.aspx?id=7967>

and here for details of activities of each service unit and in each business area

<http://www.goteborg.com/templates/Page.aspx?id=8111>

The company has been particularly effective in using events to raise the profile of the city and attract visitors. This has included attracting major footloose events such as the European Athletics Championships, and creating regular events such as a World Youth Football Championship.

Göteborg & Co has been a driving force in the introduction of the 'Marketing Fund' - a fund that is generated through a small fee for hotel accommodation together with contributions from local authorities, the state and other industry (e.g. €2 from the tourists via the hotels +€2 from the local authority + €2 from the state +€2 from other industry = €8 per overnight stay at a hotel). How the money is spent is decided locally in collaboration between the industry and the local authorities/partnerships of local authorities involved.

1.2 Four Roles

A useful way of thinking about the functions that a destination management "system" should have is to think of it as having four roles: leading and co-ordinating the development and promotion of the destination, attracting visitors, serving visitors, and serving the industry.

The organisational structure of tourism in Jersey is currently not far off this.

Economic Development has primary responsibility for product development. It commissioned the Destination Audit in pursuing that mission. Jersey Tourism is organised on the basis of departments that focus on attracting visitors and serving them.

The Jersey Hospitality Association has a clear responsibility for serving the needs of industry members. This includes providing them with recruitment and training services, lobbying on their behalf both from a political and industry based perspective, and providing supplier discounts, incentives etc. A broad range of membership services and other benefits are also offered, including the publication of consumer guides.



There is much to be done, however, to meet the challenges facing the industry, and the issue is whether alternative organisational arrangements could be more effective in delivering the four roles.

Role A: Leading and Co-ordinating the Development of the Destination

The Destination Audit identified a raft of possible product development initiatives that require strong leadership. They include:

- Developing more self catering
- Repositioning the events programme with more emphasis on events that work to promote a distinctive and quality-oriented image of Jersey, such as a Jersey Fluke Festival and Jersey Christmas Festival/Festival of Light .
- Reaching a view about and progressing major capital developments such as a new National Gallery, Cruise Terminal, development of the Durrell Centre, revitalisation of Elizabeth Castle.
- Repositioning the image of Jersey and taking a cross-sectoral approach to the promotion of the image of Jersey.

Role B: Attracting Visitors

This role is the one, of course, that the industry is generally most concerned with.

The Destination Audit recommended changes in the way in which the island is promoted to visitors, reflecting changes that Jersey Tourism and their advertising agency have already been working on.

In particular, the report recommended a “cluster” approach that are targeted at particular market segments and which are developed with clusters of business that have particular appeal to those market segments.

Role C: Serving Visitors

This role includes the provision of information to tourists when they are on the island.

It can potentially also include a range of other facilities that visitors are likely to want ranging from good restaurants to good toilets.

Role D: Assisting the Industry.

There are many services which operators in the sector typically look to a tourism organisation to provide. There is a representational role - campaigning on its behalf on issues that concern it. There is also a more direct provision of useful services such as training, help with recruitment, supplier discounts etc. JHA currently plays this role and seems to do so effectively.

Recommendation: the system adopted should be competent in carrying out all of these roles. They do not necessarily have to be the responsibility of a single organisation, but it has to be clear who is responsible for each of them.



1.3 Should it be a PPP?

As outlined above, the trend is towards destination management and marketing organisations being independent public-private sector partnerships, but it does not have to be that way. In Wales, for example, the national Tourist Board has been absorbed by the Welsh Assembly to become a government department, rather as Jersey Tourism is today, and in the North East of England the regional tourist board was absorbed by the Regional Development Agency. Many local authorities still have an in house tourism department, although it is now rare for larger cities to do so.

Jersey already has a track record of successful PPPs in, for example, the Jersey Conference Bureau and Jersey Finance.

A PPP that is responsible for marketing Jersey and for managing the visitor economy would have advantages, for example:

- It would give the industry a greater say in the marketing of the island and destination development projects;
- It could unlock additional resource from the private sector;
- It could allow some rationalisation and efficiencies.

It could also, however, have some downsides:

- Assuming that there is a membership scheme, it might introduce the problem of the organisation being beholden to current operators as opposed to thinking more strategically about the good of the whole industry.
- It could make it less easy for the tourism industry to lobby;
- It might result in additional overhead costs.
- It is necessary to respect the contractual obligations to staff currently employed by the States and JHA whose jobs may be affected by the new organisation.

Recommendation: a PPP seems to be the logical way to proceed.

1.4 Should it extend to all businesses with an interest in the success of Jersey?

One of the key objectives of destination private-public partnership organisations is to release more funding from the private sector.

There may be potential to leverage greater funding from the tourism business if they can see that a new organisation is delivering considerable added value, but it will not be easy - tourism operations typically have relatively small budgets for marketing and, especially in a situation like Jersey's where most businesses are not booming, getting them to stump up more money would not be easy.



The key to securing more substantial additional funding is perhaps to extend the remit of the organisation beyond pure tourism.

If it was responsible for the promotion of the Jersey “brand”, it could then engage all organisations that might benefit from the image of Jersey being improved.

This kind of thinking applies in places like Liverpool and Manchester, where all organisations that have an interest in the success of the city are encouraged to join the marketing partnership and there is a “corporate membership” scheme. In Southampton, an initiative called Business Southampton has been set up to do the same sort of thing. It secures most of its funds from the private sector and has 50 members. They pay between £3,000 and £25,000 a year. Its remit is to promote the city. It demonstrates that larger local companies are normally willing to make a contribution to promoting the image of the place in which they are based.

The decision as to whether or not it makes sense to create a PPP may depend on whether it could secure significant additional funding for the promotion of the Jersey brand. That may depend on whether the remit of the organisation is extended to include non-tourism businesses that have an interest in the image of Jersey and the quality of life there being improved. JHA has welcomed the idea, so it has been incorporated into the proposed organisational framework.

1.5 Should town centre management be included?

The Destination Audit emphasised the importance of improving and promoting the experience in St Helier. There are a number of reasons for this:

- The experience that attractive towns and cities provide is an important ingredient of any holiday or short break for many people.
- A large proportion of the island’s hotels, and all of those where major investment is taking place, are in St Helier.

The situation is a little different on the island than it is on the mainland. For most towns and cities, it is just as important to be trying to attract local people to the town centre as it is to be trying to attract people to visit from further afield. There is a local marketing job to be done for the town/city centre.

This is perhaps less the case on the island simply because the choices as to where people can shop are less. Nevertheless, there is probably more that could be done in promoting St Helier to people who live on the island.

Many of the businesses that operate in St Helier benefit greatly from the island’s tourism industry. In turn, they are an important part of the destination offer. Currently they are not considered part of the destination offer and there is no way for them to participate in the development and promotion of it.



The Destination Audit also suggested the development and promotion of “festival waterfront” experiences in St Aubyns and Gorey Harbour.

Recommendation: new organisational arrangements should seek to incorporate businesses that operate in the key commercial hubs on the island and help develop a stronger town centre management function. This may be a “Stage 2” development after the new organisation is up and running.

1.6 Should it have membership?

There are arguments for and against having a membership scheme. Some destination marketing/management organisations (such as LeicesterShire Promotions) argue that the cost of administration outweighs the benefits and that having membership would prevent them from taking an even-handed approach. They prefer to generate income from the private sector by making a profit on marketing initiatives.

Most partnership organisations do, however, have a membership scheme of sorts. They regard it as a sign of commitment from businesses and, of course, as a means of generating income.

Membership schemes can take the form of “general membership”, normally at a relatively low cost, which is intended to entice a wide range of members.

They can also take the form of “corporate membership”, a smaller number of big players who are prepared to make a large contribution on the basis that it is in the interests of the place that they are located, as in the Southampton example quoted above.

The Mersey Partnership (TMP) in Liverpool, for example, combines the “mass market” and “corporate” approaches.

Its normal membership fee varies from £175 to £540 per annum, depending on the nature and size of the business. About 300 organisations pay these fees.

It also has three categories of “corporate membership” - Principal Partner (£52,500pa, Corporate Partner (£25,500 pa) and Executive Partner (£5,000 pa). TMP states that “Corporate Membership is open to any business with an interest in helping raise the image and promote the economic development of Merseyside”. About 100 organisations have this level of membership. They cover the full gamut of the economy - solicitors, developers based in the city, housing associations, sports clubs, etc.

Suggested Approach:

- *The new organisation could have a membership programme that has two tiers - corporate and general. The general membership could be aimed at businesses that stand to benefit directly from promotional and event activity. They could include hotels, other visitor accommodation, shops, bars and restaurants, clubs, and tourist attractions. The fee could be affordable and could have a simple tiering based on size of business, similar to that of the Jersey Hospitality Association.*



- *It could also have a corporate membership scheme, aimed at all other organisations on the island that have a stake in Jersey's success. It could also be tiered, probably with the bottom level being a few thousand pounds.*

1.7 Should the Jersey Hospitality Association remain independent of a new PPP?

The JHA's current position is to continue to operate as an industry based trade association.

There are arguments for JHA remaining a separate organisation:

- It can best continue to have a representational role and lobby if it is independent;
- It can provide industry support services that are independent of the new organisation (e.g. skills and training).

There are also arguments why it should be subsumed into a new organisation:

- The PPP will be independent of government so there is no need for a second such organisation to represent the industry;
- The new PPP would create a better vehicle for lobbying, especially because it would have a senior officer and representative of the States on its Board;
- If it continues to exist, the two organisations will be competing for membership.

Suggested Approach:

Since the private sector would be asking the States to put the resources that they dedicate to tourism into the new organisation, it should/must show that it is equally fully committed. It should put all of the resources at its disposal, and more, into the new organisation. The structure of the new organisation should take care of the specific needs of different sections of the industry and general needs such as skills and training.

1.8 Should the Jersey Conference Bureau be included?

The bureau has been effective and there is an argument for not fixing something that is not broke.

On the other hand, however, this is a core service that one would expect to be provided by the new PPP.

Suggested Approach:

The Conference Bureau is included in the new organisation, as a "division" with a separate committee overseeing it.



2. Options

The following is a summary of possible options. 3.4 is the one that we recommend and we have outlined in more detail in section 4.

2.1 No change

The existing structure could be retained, perhaps with some relatively minor changes to provide a fresh approach. They might include the creation of forums to oversee key aspects of the delivery of the strategy on a similar line to those suggested in the next section.

Jersey Tourism has recently been reorganised, with a new management structure, but the changes have not yet had time to bed in. Jersey Tourism has been talking with the Jersey Hospitality Association about how they can work more closely together and remove causes of friction.

Advantages

- Would cause minimum disruption and allow focus on the job at hand without distraction by organisational change.
- As mentioned previously, the existing structure has relatively clear delineation of the four roles outlined in section 1.2.
- Retains the ability of the Jersey Hospitality Association to speak independently on behalf of the tourism industry.

Disadvantages

- It would be seen as preserving the status quo. There seems to be an appetite for more radical change in order to address the major challenges facing the industry.

2.2 A “Virtual” PPP

A structure could be established that resembles a PPP without it actually becoming an independent entity. This is the approach taken, for example, by New Forest Tourism.

It could apply to either a narrow focus tourism oriented organisation or one that is more broadly focused on the promotion of Jersey (i.e. the two options outlined below).

It could entail the creation of executive committees, similar perhaps to those outlined in the next section. Staff would, however, continue to be employed by the States within the Department of Economic Development and it would not be a legal entity.

Advantages



- Could create better collaboration and many of the advantages of a PPP without upheaval.

Disadvantages

- The freedom of the organisation to act boldly could be undermined by its lack of independence from the States.
- It probably would not be as effective in releasing additional funding from the private sector as a proper PPP would be.

2.3 A Tourism Focused PPP

This would involve the creation of a PPP that was focused on the traditional tourism sectors - especially accommodation and attractions. It would probably mean the merger of Jersey Tourism and the Jersey Hospitality Association into a single independent organisation.

It would probably also be logical for the Jersey Conference Bureau to be included. It would probably have a membership scheme, a continuation of that of JHA.

It would be similar to a regional tourist board in England.

Advantages

- A streamlined way of bringing the private and public sectors together to develop and promote the industry.
- Would be seen to represent major change and a fresh approach.

Disadvantages

- Would cause considerable disruption while it is being implemented.
- Might be seen by existing staff to represent less security.

2.4 A Wider Focused PPP

This would be similar to organisations like Marketing Manchester, The Mersey Partnership and Göteborg & Co. Its remit would be to promote the image of Jersey for all purposes and to improve the quality of life on the island for the benefit of visitors and locals alike.

It would engage with a wider range of businesses in doing so. It would probably have a two tier membership scheme - "normal" membership for businesses that are directly involved with the visitor economy and corporate membership for those that are not.

Advantages



- Should have the capacity to release considerable more resource from the private sector by engaging major players that have an interest in the success of Jersey but are not directly involved in tourism.
- Engages with companies, especially from the retail sector, that benefit from tourism but currently do little to contribute to its promotion.
- Should promote a more collaborative cross-sectoral approach to the marketing of Jersey, along the lines that New Zealand has taken.

Disadvantages

- May be conflict with Jersey Finance, which represents many of the largest players on the island.
- Possibly a less direct focus on tourism issues.

