

Board Meeting Minutes

Date: Friday 28th June 2024, 9:30am - 12:30pm

Venue: St George's Court

Attendees:-

Agency Chair: Ranald Caldwell (RC)

Agency CEO: Deborah Heather (DH)

Political Member: Sarah Maltby (SM)

Board Members: David Curtis-Brignell (DCB), Richard Fletcher (RF), John Keggin (JK), Brian Thompson (BT), Connie Lovel (CL), Leigh Morris (LM), Gary Cobb (GC), Claire McColgan (CM)

In attendance: Mark Lewin -DfE CO (ML), Melanie Allen, Andy Stewart

Apologies: Sarah Maltby (SM), Brett Martin (BM)

	Agenda Item	Papers	Owner	Action
VM 11-24	Standing Items: <ul style="list-style-type: none"> Apologies - Sarah Maltby, Brett Martin Conflicts of Interest- none Hospitality/Gifts - none Previous Minutes - accepted Outstanding Actions 		Chair	
VM 12-24	Updates: Chair <ul style="list-style-type: none"> Board Members Standing Down <ul style="list-style-type: none"> Thank you from the board to departing board member RF for his help and support. The board look forward to working with him on the Mountain Biking Project. Thank you from the board to departing board member DCB for his advice, guidance and support. ML thanked RC from the board, for his enthusiasm and passion for making the island a better place and wished him good luck with the Destination First Board. New Board Positions <ul style="list-style-type: none"> The position of Chair has been offered to Andrew Mackness, who owns tourist attractions and accommodation in the south of England and is relocating to the island fulltime moving forward. Two new board positions have been offered and accepted - Andrew Jamieson and Dr Florida Clements. A 3rd individual has been offered a board position, but has yet to accept. Board papers and delegated authority <ul style="list-style-type: none"> The Chair had discussed with DH the delegated authorities and papers being circulated to the board. It was felt that these papers should not be circulated and are considered as BAU, which can be covered in the CEO's board update. <ul style="list-style-type: none"> Dark Skies - It was agreed that expanding Dark Skies is an opportunity for the island in terms 		Chair	

	<p>of marketing, but that DEFA will need to take the lead on accreditation. The proposal will go to a stakeholder meeting in July. AP - MA to interface with DEFA</p> <ul style="list-style-type: none"> ▪ Aviation Heritage - Aviation Heritage case was not supported. AP - NW to liaise with the applicant. ▪ Celtic and Viking Routes - A paper had been drafted, but was too late for circulation. As with the previous papers, it was felt this matter fell under BAU. AP - DH to review and make decision. <ul style="list-style-type: none"> • ML pointed out the role of the Board was to be involved in decision making, and there was a discussion on including decisions in the CEO Operational Report. CL suggested a brief email at the time to forewarn Board members in case further enquiries are made directly to them. BT suggested transparency on the website to encourage proposals of substance in and in line with strategy. • The Chair welcomed Melanie Allen, the new Director of Marketing & Communications. Her expertise will be very valuable moving forwards. • Discussions are underway with [REDACTED] following a site visit [REDACTED] (Business Agency). Potential sites matching the topographical requirements of [REDACTED] are being used to identify potential Isle of Man sites. AP - Steve Moore to come back to DH with details of potential sites. • Destination First <ul style="list-style-type: none"> ○ Board members have been appointed, with RC acting as Chair. <p>DfE CO</p> <ul style="list-style-type: none"> • TT - Thank you to all who assisted this year. The team is collating broad story for how the island responds to the event and plan to release statistics in July. There was a film partnership announced with significant external investment. • Concerns raised by hospitality sector in relation to staffing struggles and an emergency support package was announced just before the TT. Applications will close in the next few days and approximately 500 applicants are expected. • Finance IOM - South Africa remains a key focus and a gala was held last week. Another key focus is sustainable finance with work ongoing with Irish Institute of Sustainable Finance. Next International Assessment in 2026 and work is ongoing into evidence for this • Digital IOM - e-gaming licencing pipeline is still strong. Innovation Challenge ran after TT and was a successful event showcasing new technologies and opportunities. AI remains a key theme moving into the future. • Business IOM - First phase of Engineering and Manufacturing Strategic review is complete, with ten companies participating. Food and Beverage remains a strong industry area, though the recent event was cancelled by DEFA. Local Economy Strategy is currently being drafted. 			<p>DH</p> <p>DH</p> <p>DH</p> <p>Steve Moore / DH</p>
				<p>DfE CO</p>

	<ul style="list-style-type: none"> General - Update on air services to follow from Andy Stewart, committee still taking evidence on sea services. Immigration issues ongoing with prosecutions of those abusing the work permit system. Island Infrastructure Scheme has seen the announcement of new developments in recent days. <p>Steam Packet</p> <ul style="list-style-type: none"> Ongoing select committee around sea services agreement and waiting for outcome of this. Paper submitted to the DOI about the long term strategy for sea services, but no decision on this yet. Ongoing issues and misconceptions around exporting off the island. Discussion around Steam Packet prices, as there have been comments about prices being high. Select Committee on the sea services agreement has concluded, with recommendations on pricing to follow. Steam Packet keen to grow current Irish routes, but there seems to be limited demand from the Irish market, and this is corroborated by low demand on flights. <p>Airport</p> <ul style="list-style-type: none"> Belfast air routes will no longer be served by EasyJet or Emerald after the summer period. Talks are ongoing with Loganair, however demand is potentially too low for them. Emerald are focused on Dublin routes. EasyJet have raised the issue that APD is too high and comments were made at Routes that the rate of APD charged on the island is higher than anywhere else in the British Isles. EasyJet to make the Bristol route seasonal, which is a possible warning sign for low numbers. This also means numbers at the airport will decrease this year. Moving into the summer season and there have been recent issues with resilience across the wider aviation network; <ul style="list-style-type: none"> Air traffic controller sickness at Ronaldsway Air traffic controller sickness at Gatwick EasyJet aircraft changes due to scheduling General lack of new aircraft in the system, due to issues upstream with manufacturing. This means airlines are struggling to source new aircraft to replace existing and to develop new routes. Charters are doing well. <p>CEO Update</p> <ul style="list-style-type: none"> Accommodation capacity presentation from DH, showing occupancy increases for serviced and non-serviced accommodation in off peak but significantly more in peak periods. Visitor trends show that there is a shortfall of visitors in 2024 Q1 compared to 2016/2017/2018 Q1 figures. Likely to be linked to air routes being reduced over the winter period this year. Discussion about how to boost numbers over the winter period with a focus on North West of the UK. High air passenger duty (APD), wet spring, Early Easter are all believed to have contributed to this drop in numbers. This will put our 330k visitor target under pressure. AP - DH to 				
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DH

	<p>liaise with Andy Stewart on APD as per his Air Strategy Update.</p> <ul style="list-style-type: none"> • BT advised the plan is eventually to replace the Manannan with a year-round vessel. • GC advised that air routes may be difficult, as EasyJet are targeting the European market, not the domestic market. • Slight drop in Homestay space this year, but things will improve next year, and JK highlighted positives and the marketing opportunities for the next year. Some issues around unregistered properties operating this year, which is in hand. 			
VM 13-24	<p>Visit Performance Review (standing item) & Passenger Survey</p> <ul style="list-style-type: none"> • Paper attached and accepted as read. • DH elaborated in the Budget update. • DH pleased that MA is now in place as Director of Marketing and Communications. 	Paper Attached	DH	
VM 14-24	<p>CEO Visit Board & 2024 Targets</p> <ul style="list-style-type: none"> • Paper attached and accepted as read. 	Paper Attached	DH	
VM 15-24	<p>Budgets Update - 2023/2024 and 2024/2025</p> <p>2023/2024</p> <ul style="list-style-type: none"> • Marketing came in under budget, with a number of campaigns being successfully delivered, including ITT campaign, which unfortunately did not hit the 23/24 P&L. • Travel Trade campaign over the last year has shown that island may not yet be in best place to capitalise on this. • Agency has been running understaffed for much of the year, which brought the payroll bill in under budget, but has been difficult to manage. <p>2024/2025</p> <ul style="list-style-type: none"> • Agency asked to defer spending 10% of budget - £260,000. • Visit Agency Team staffing now includes the Welcome Centre Staff. It is the intention to move Visit Agency staff located in St George's Court to the Sea Terminal. • ML clarified the potential for additional DFE funding outside of the annual budget - Challenge Fund, Economic Strategy Board. • Government PR firm contract is under review, and the Visit agency rely on them for external reach. In relation to the £5.8 billion reach figure which was queried by the Chair, given by a statement by the Minister in Tynwald. ML agreed that Visit could use whatever metrics were appropriate in its industry, but given the lack of understanding of reach, that these should be for the Board and self-management rather than being used at Tynwald. • CM advised that there is a Newcastle-Gateshead DCMS pilot of the LVEP programme that may contain useful learning on tourism budget management. Although she pointed out that the way Visit is currently funded on the IoM is way ahead of the UK model. 	Paper Attached	DH	

	<ul style="list-style-type: none"> DCB advised that funding in UK regional tourism boards is more piecemeal and difficult to manage, as applications are made from different funding pots. 			
VM 16-24	AI Presentation <ul style="list-style-type: none"> AI video presented showing AI tool interacting with a user searching the Visit Isle of Man website. The tool can be limited to drawing its information from the website, rather than the wider internet, ensuring data used is current and accurate. The tool is envisaged to sit on the Visit Isle of Man website. GC raised possible issues with recommendations of specific accommodation or businesses. Governance methodology will be established by the Digital Agency. ML raised the example of someone asking for a hotel room and being provided with a list to ring through. It would be better to be able to narrow these down to those with availability for the customer. MVP to be produced testing the system using the steam train, possibly the wildlife park, possibly something from MNH and maybe 1 or 2 of the hotels. The goal is to create a booking service as part of the tool. AP - Pilot expected to take place in Q4 of 2024 and DH to update at that stage. Discussion about partnering with transport firms, but the tool is not at that stage yet. DH stated there are travel companies that Visit could partner. BT suggested the AI tool may be of use to Welcome Centre staff allowing them to use on calls to members of the public. LM suggested visuals would be beneficial alongside the text-based information, but this may sit in webpages or emails created by the tool as follow up. 	Video	DH	DH
VM 17-24	PR & Marketing Update <ul style="list-style-type: none"> Presentation from Melanie Allen about her first six weeks in post. Meetings with stakeholders have taken place to understand broader marketing and communications activity and to look at opportunities for collaboration to develop the Island's wider profile with a focus on aspiration and awareness building. Focus on target audiences and perceptions of the island, balanced with the UK's latest visitor travel trends, such as marine, ecotourism, astro-tourism, multigenerational travel. Currently developing digital marketing operations to expand use of a range of social media platforms through a test and learn strategy. Quarterly Marketing Meetings established for collaboration with TT, Airport, Steam Packet to explore marketing opportunities, identify joint market segmentation and visitor profiles. Establishing a data led marketing approach. Culture blog post received the most engagement by some margin, meeting to be set up with MNH. ITT campaign was very successful and grew organically across platforms with increased engagement. Some programmes for the 2024/2025 year will require additional funding to achieve the KPI targets set. 	Presentat ion	Melanie Allen	

	<ul style="list-style-type: none"> Real time Dashboard is being looked into alongside a new website and mechanisms to increase bookability. 			
VM 18-24	<p>Airline Strategy Presentation</p> <ul style="list-style-type: none"> Engagement presentation of Strategic Air Services Policy. Covid impacted the island significantly and direct subvention was implemented. This has been ongoing since that time, with tactical interventions being made. Decision to set up a strategic policy position going forward. The island operates an open skies policy, along with many other countries. This means any operator can fly to and from the island and there is little that can be done to prevent this. A pro is that it improves competition, but a significant con for the island is that commercial operator aims do not necessarily align with island air connectivity. The Steer report commissioned by the government concurred and advised that full market freedoms can be detrimental to small markets and the Isle of Man. Steer report identified key routes for leisure and business customers, and highlighted their respective priorities. There has been a shift in recent years to lower frequency and higher capacity flights. Potential commercial levers and options were highlighted and respective risks identified. Request for feedback from the Board <ul style="list-style-type: none"> JK raised that Bristol airport market is very important from Island Escapes perspective. Andy Stewart sees a role for Visit Agency to aid in boosting air routes GC commented that route subvention has become normalised in other regions, but is a new concept on the island, meaning we are struggling to compete. Next steps: report to go to the Council of Ministers, in order for them to determine air services policy. Strategic approach will then be determined, likely with a more commercial than regulatory focus. 	Presentat ion	Andy Stewart	
VM 19-24	<p>AOB</p> <p>Minimum Wage / Living Wage</p> <ul style="list-style-type: none"> BM, whilst not in attendance, did discuss MW/LW with the chair. Government minimum wage committee pragmatic findings should be made available to the board. AP - RC to request MWC completed report. Concerns in the business community about the tapering of the minimum wage. Discussions took place around minimum wage with BT pointing out that many were already paying living wage to get quality team members. General consensus around the industry being split on this point. <p>Papers for Decision - TEDS - FC Isle of Man</p> <ul style="list-style-type: none"> Comments to be passed to DH after the board. BT, RF, and GC requested additional information and access to accounts. RF commented that it is a large proportion of the TEDS fund 		RC	RC

	<p>being requested, and suggested potentially the Challenge Fund should be the source of funding applied for. Raised issue of commercial sponsoring during away matches.</p> <ul style="list-style-type: none"> • DCB raised the issue that the TEDS fund should be focused on supporting new events, rather than existing ones, which was acknowledged. Comments to be passed to DH after the board. AP - All to pass comments to DH after the board. • BT, RF, and GC requested additional financial information from Mike Doherty, possibly with access to accounts. AP - Mike Doherty to provide financial information to board members. <p>Farewell to departing board members</p> <ul style="list-style-type: none"> • Farewell gifts were presented to the departing Chair (RC), DCB, and RF. 			<p>All</p> <p>Mike Doherty</p>
	<p>Next Meeting Dates: 13th September 2024 6th December 2024</p>			
	<p>Close</p>			

Action Summary

Ref	Description	Owner	Due Date	Status
Brought forward				
VM-33-22-4	Bee Gees and possible exhibition on Island MNH to liaise with Liverpool City Council and explore ways in which they promote their links to the Beatles and possible opportunities for MNH and links to the Bee Gees Update 28/06/24 - CL has confirmed that this is still an opportunity and will progress.	CL/CM	SEP 2024	Ongoing
VM-25-23-1	Current condition of public rights of way The Public Rights of Way Group will be providing a report and recommendations to Tynwald in May 2024. Expectation that this will be shared with RC and DH. Update 28/06/24 - still ongoing issues with footpaths, RC to raise with DOI as part of DFB	DFB (Destination First Board)		CLOSED
VM-34-23-1	Heysham ferry terminal upgrade & Morecambe Eden Project discussion Meeting with David Morris (Morecambe MP) to be rearranged in May Update 28/06/24 – No contact from David Morris, likely due to ongoing UK election. DH to liaise with new constituency MP – Lizzi Collinge	DH	SEP 2024	Ongoing
VM 36-23-1	Steam Packet business and marketing plan Action combined with VM- 38-23-1/ VM-39-23-2/ VM-39-23-3. Meeting to be scheduled with BT/Steam Packet in order to discuss overarching business & marketing plans.	DH	SEP 2024	Ongoing
WS-2	Accommodation and events strategy Request to create a graph similar to the ones shown in the meeting to show the curve for types of visitor including groups. NB please note segmentation will be varied across the industry. Information received from BM & JK. Graphs to inform the Event strategy and Travel Trade targets. Update 28/06/24 - Waiting for MICE research to come back. Not expected to be ready for September board, so possible October workshop - DH to advise	DH	OCT 2024	Ongoing
VM-02-24-1	Liverpool ferry terminal opening Visit IOM to discuss plan for the new ferry terminal launch with external comms. Update 28/06/24 - Visit Isle of Man to establish visual Isle of Man presence	DH	SEP 2024	Ongoing
VM-02-24-2	Destination First Board EOI to be issued to members of public in next week Update 28/06/24 - Board has been set up and first workshop set up for 23rd July 2024	DH		CLOSED
VM-02-24-3	HiT Scotland Business Agency to advise of decision Update 28/06/24 - Passed to business Agency to progress	RC/TC		CLOSED
	Parking Permits Permits for properties had fallen off previous AP list – passed to DFB	DFB		CLOSED

New				
VM-12-24-1	Dark Skies MA to interface with DEFA regarding accreditation after their stakeholder meeting in July.	MA	SEP 2024	New Complete
VM-12-24-2	Aviation Heritage NW to liaise with the aviation heritage applicant to advise of board decision.	NW	SEP 2024	New Complete
VM-12-24-3	Celtic and Viking Routes DH to review Celtic and Viking Routes proposal and make decision.	DH	SEP 2024	New
VM-12-24-4	Zipworld Steve Moore is looking into potential sites for IOM base Zipworld attraction and to come back to DH with details of potential sites.	Steve Moore / DH	SEP 2024	New
VM-12-24-5	Airline Strategy DH to liaise with Andy Stewart on APD as per his Air Strategy Update.	DH	SEP 2024	New Complete
VM-16-24	AI Pilot Pilot expected to take place in Q4 of 2024 and DH to update at that stage.	DH	Q4 2024	New
VM-19-24-1	Government minimum wage committee Pragmatic findings should be made available to the board and DH to request MWC completed report.	DH	JULY 2024	New
VM-19-24-2	FCIOM Funding Paper Comments on proposal to be passed to DH after the board.	ALL	JULY 2024	New Complete
VM-19-24-3	FCIOM Financial Information Mike Doherty to provide financial information to board members.	Mike Doherty	JULY 2024	New Complete