

MINUTES OF THE 454th MEETING OF THE VISITENGLAND ADVISORY BOARD (VEAB)

TUESDAY 14th March 2023 at 1000

Boardroom, 3 Grosvenor Gardens, SW1W 0BD

Present: Fiona Pollard (Chair), Interim VEAB Chair
Sarah Fowler (SF), Board Member
Allan Lambert (AL), Board Member
Dr Andy Wood (AW), Board Member
Nigel Wilkinson (NW), Board Member
Laura Backhouse (LB), DCMS Observer (part attendance)
Hanna Ostling (HO), DCMS Observer (part attendance)
Andrew Huggins (AH), Board Apprentice

In Attendance: Patricia Yates (CEO), Chief Executive/ BTA Accounting Officer
Andrew Stokes (AS), England and Commercial Director
Serena Jacobs (SJ), Finance Director
Lyndsey Turner-Swift (LTS), Deputy Director England
Suzy Faulkner (SFa), Head of Product Development and Distribution
Debra Lang (DL), Professional Services Director
Henry Bankes (HB), General Counsel and Company Secretary
Richard Nicholls (RN), Head of Research and Forecasting
Satpal Chana (SC), Head of Data and Analytics
Ross Calladine (RC), Head of Business Support
Evelyn White (EW), Company Secretarial Executive (minutes)

1.0 Welcome and Introductions

1.1 Apologies for absence

1. Apologies were received from Nadine Thomson.

1.2 Register of Interests

2. The Chair reported she had resigned as a Director of Heritage Events Limited and Eagle-Eyed Ventures Ltd and requested the register was updated according.

1.3 Minutes from the last meeting (21st November 2022)

3. The minutes from the last meeting were approved.

1.4 Action Tracker

4. Each action was reviewed and its status updated on the action tracker.

2.0 Review of Strategic Matters

2.1 BTA

5. The Chair gave an overview of the main items discussed at the last BTA Board held on 31st January 2023:
- Emir Feisal, the ALB Review Lead, attended the meeting where the Terms of Reference were discussed and views shared by the Board. These were currently with the Secretary of State for approval, and it was anticipated the draft report would be available by the end of May.
 - The 2023-24 budget was approved.
 - The 2023-24 corporate priorities were presented, where more focus will be given on measurable KPIs and this was welcomed by the Board.

2.2 Audit and Risk Committee (ARC)

6. NW gave an overview of the main items discussed at the last ARC meeting held on 22nd November 2022:
- Updated ARC Terms of Reference were approved.
 - Internal audit (GIAA): work was continuing on cyber security and further areas of focus included Grants Management and international offices.
 - External audit (NAO): a change in auditing standards was made to increase emphasis on the review of risk assessments.
 - Corporate Risk Register: NW fed back to ARC the observations made at the last VEAB on the volume of residual red and amber risks.
 - The Indian Subsidiary continued to be addressed in relation to compliance.
 - Annual ARC Effectiveness Questionnaire: ARC members were asked to complete these, the results of which will be presented at the next meeting (March).
 - Carol Hui announced she was stepping down from BTA Board and ARC Chair in June. VEAB registered their appreciation and thanks to Carol on the significant improvements made during her leadership.
 - The next meeting was on the 17th March and would cover; the Annual Report and Accounts; deep dive on International Offices; Corporate Risk Register Review; and seek to approve the Delegated Authority policy.

2.3 Remuneration and People Committee (RPC)

7. The Chair provided an overview of the main items discussed at the last RPC on 17th January 2023:
- i. PWC had been appointed as independent pensions advisor.
 - ii. The vacancies at BTA Board and RPC were being advertised, and it was hoped that the BTA Board campaign would yield a new ARC Chair.
 - iii. Organisational Design was reported as being on track; the Directors and Deputy Directors structure was being rolled out.
 - iv. The Target Operating Model was progressing steadily; activity and capabilities were being scoped before advancing implementation.
 - v. An update on the Estates Strategy was given, where recommendation on the proposed office locations were being considered and would be presented to the BTA Board on 21st March.

3.0 Review of Strategic Matters

3.1 Political

8. The CEO gave an overview of current political priorities:
 - i. Julia Lopez MP had been appointed the new Tourism Minister.
 - ii. The CEO and BTA Chair were scheduled to meet with Lucy Frazer MP, Secretary of State for Culture, Media and Sport.
 - iii. GREAT Programme Board – a campaign bid for domestic marketing aligned to the Prime Minister’s priorities had been submitted.
 - iv. Inter Ministerial Group (IMG) – the BTA Chair attended the recent meeting which focused on competitiveness. The next meeting would lead on productivity; the CEO and NW were supporting this through the Tourism Industry Council (TIC).
 - v. Electronic Travel Authorisation scheme – it was announced the first scheme would launch in the GCC in October 2023.
 - vi. France UK Summit – the policy issue concerning visas for school trips was raised, which was with the Home Office for further discussion.

3.2 CEO report

9. The CEO shared an update on her current priorities:
 - i. LTS was appointed Deputy Director VisitEngland (VE). The remaining Deputy Director selection process was underway, with the intention to recruit all posts internally.
 - ii. Estates Strategy – the project team had now visited the final contender cities and were preparing a report for the next BTA Board.
 - iii. England Tourism Week (ETW) – this was launching next week; a full programme of activity was planned with support from a cross-section of stakeholders.
 - iv. International campaigns – campaigns had launched in France, Germany, Spain and GCC. A dedicated campaign in the US played on regional accents using new interactive techniques.
 - v. CEO visit to USA – the purpose of this visit was to observe firsthand the progress of recovery. There was a unanimous view that overseas travel was being prioritised, and that luxury travel in particular was strong. The UK was now the most popular European destination of travel in the USA. It was reported that supply costs had gone up by 20-30%, which consumers were prepared to pay, but there was a high expectation for service and quality to similarly improve and this was being closely monitored. There was a drive to create more travel in the ‘shoulder period’ (November-March) given the better price point, which had resulted in the instigation of a review of marketing to ensure it is best optimised to support that.
10. NW welcomed the focus to marketing shoulder months, that it would prove encouraging for productivity, and also noted that this period could also potentially include October and April, as these were periods when occupancy levels were lower.

3.3 Strategy and Business Plan update

11. LTS shared a paper on the Q4 progress and the priorities for 2023-24 and sought agreement to align future reports with the refreshed dashboard used by the BTA Board, which is focused more on performance and measuring achievements, which was agreed. The highlights from Q4 were reported as:
 - i. Sustainability strategy – the recruitment process for a Senior Sustainability Manager had successfully selected a candidate who was due to start in May; SF was thanked for her specialist support during this process.

- ii. The DMO Review and accessibility were noted as key areas and would be reported on in more detail under dedicated agenda items (item 5.5 and 6).
 - iii. Consumer brand – a full update was due to be discussed at the next VEAB in June. It was currently at research stage; these learnings would inform a brand to work with partners. AW recognised this as an opportunity to work with LVEPs (Local Visitor Economy Partnerships) by adding regional value and centralise knowledge.
 - iv. ITB Berlin 2023 – feedback had been received that there was a need to improve the England content and to consider how to get the best out of our presence going forward. The CEO cautioned that content was an issue across the organisation, that we currently didn't have access to a range of timely assets. Part of this issue was due to the structure of brand and content being in the same place, which isn't compatible with industry. Robin Johnson, Marketing Director was currently reviewing this to seek improvement. NW highlighted the value of more regional product being included.
12. The Chair welcomed the request to streamline formats with the BTA Board and also underlined the value of the focus on monitoring performance against plan
13. LTS turned to the 2023-24 VE priorities and gave emphasis to the following areas:
- i. Embedding DMO landscape – VE will be focused on supporting the delivery of the LVEP programme and collaboration and looking at how VisitBritain (VB) and VE will work with this new landscape, by considering the opportunities, challenges and requirements across the organisation and the LVEPs. NW sought clarity on whether there would more DMO pilots; AS advised there was potential for a second pilot if it was funded by local government, but this was not yet confirmed.
 - ii. Development of the sustainable visitor economy strategy – plans were underway to facilitate a deep dive at a future VEAB to focus on sustainability. AW suggested consulting with other organisations who had carried out research into SME growth and mid-sized businesses, to seek common themes. NW flagged that these were also workstreams at TIC and remarked on the benefits of a joined up approach. SF recognised the link to decarbonisation and how tourism can contribute to net zero by 2050. It was noted that by connecting infrastructure into the VE strategy, that this would align more closely.
 - iii. England Academy – SFa advised that three different suppliers had been commissioned to produce the content for the Travel Trade, Ecommerce and Digital Marketing modules, which were due at the end of March.
14. The Board welcomed this overview and agreed the direction of the strategy and business plan.

3.4 Budget

15. SJ took the Budget 2023-24 papers as read, adding there were subsequent small changes due to some movable components e.g. Irrecoverable VAT, creating budget pressures which have to be managed. Those relevant to VEAB were reported as:
- A further £250k was being added to the Retail contribution budget.
 - Transformation programme – £250k retail funds above have been ringfenced for the Learning Management System and VisitEngland website.
16. The high-level budget was due to be presented to the BTA Board next week for approval. The Chair sought assurance on transformation funds and delivery, which SJ acknowledged was being closely monitored with DCMS to ensure delivery of the programme within the initial funding provisions and that, despite budget pressures, management were on track to deliver the full programme by March 2025.

3.5 Commercial income

17. AS shared a paper bringing Board members up to speed on the commercial activity and to also highlight the different types of commercial activity between net cash contributors and investment generation. The paper was also being presented to the BTA Board next week. The following observations and additions were made:
- i. Board members sought clarity on the scale and scope of the commercial ambition and were mindful of inherent constraints. The CEO stated that currently the approach was to optimise capacity, by building on partnership opportunities and developing product.
 - ii. It was recognised that a large proportion of our commercial revenue in the past was due to being the key seller of Oystercards to overseas visitors.
 - iii. The growth of products in the retail shop had exceeded expectations, and there were aspirations to move towards a product range with greater regional content. The CEO pointed out that to achieve/ exceed 2019 levels, a strong commercial focus was required. Board members encouraged focus on the customer journey and to seek opportunities through this cycle of activity e.g. tactical opportunities. NW commented on a recent Booking.com event he had attended which highlighted the considerable resource available to commercial enterprises and cautioned that the retail shop was appropriately resourced. It was also discussed that the power of the VE brand, one of trust and knowledge, which should not be underestimated when agreeing commercial partnerships.

ACTION: The Chair asked Board members to give further feedback or suggestions on any commercial activity to Andrew Stokes before the BTA Board (21/03/23).

4.0 Activity for Board Feedback

4.1 People and Organisational Design

18. DL informed the Board of progress in relation to Organisational Design, Culture and the People Strategy, and took the paper as read. A key activity that included both VE and VB was an exercise on culture, vision and values, which would feed into the new organisational purpose and define our new values. Once these are established, a 'rich picture' will be produced to bring together all outputs to enable a visual display on the intranet to drive the ethos of one global team.
19. The Staff Survey results had applied focus to specific areas of activity, in particular, the Learning and Development strategy, and the delivery of a global benchmarking. The Wellbeing Package was also being reviewed, both financial and non-financial aspects. NW referred to the recent staff survey results and sought clarity on the 'Taking Action' column. DL explained this was thought to be lower due to good news/messaging not being amplified sufficiently, and also considered it to be linked to pay and benefits – these learnings were being picked up in future projects e.g. development of the 'rich picture' and benchmarking exercise.
20. DL provided an overview of the Estates Strategy, noting it would be rolled out over a period of 5 years. The contending cities were currently undergoing in-depth scrutiny - it was noted that sustainability, accessibility and maintaining our brand were all important principles, and that there were limitations set by the Government's remit. The transition would be supported by the Hybrid Working Policy, to build on current practices and to encourage more thought on planning working patterns e.g. the 'locate for your day' strategy. The use of digital tools would also be further optimised to maintain a strong team dynamic. The impact to staff was being closely monitored through the RPC. Board members were complimentary of this approach and concurred with the plans being developed to carefully support all staff throughout the transition.

4.2 DMO Review

21. LTS took the paper as read and highlighted the progress made to date, which was recapped as follows:
- i. The programme launched on the 17th February 2023 with targeted communications to DMOs. Collaboration agreements for the North East LVEPs had also been signed. The North East pilot was reported to be progressing well.
 - ii. 12 applications had been received and were currently being assessed. A key challenge identified was regarding financial stability, and ways to support and improve this information were being addressed. It was also recognised that the longevity of funding would need to be closely monitored, in particular in relation to ongoing local government commitments.
 - iii. In light of feedback from the initial consultation last year, the LVEP Programme Awards Panel (in January) had agreed the partnership boundaries to guide DMOs applying to become partnership LVEPs. It was also agreed that geographic overlaps, aligned to the principles in the review, would not be considered at this stage.
 - iv. Benefits of accreditation were highlighted and included; enhanced relationship with VE, provision of knowledge/expertise and access to guidance and support; marketing and business events opportunities; the use of VE branding to boost reputations; and in addition to the local benefits of having a nationally recognised status as the 'go to' body for the visitor economy in the area.
 - v. The Regional Development Team was now at full complement and the Awards Panel was due to meet on 28th March to consider the 12 new applications. It was recognised that the action plan template was important to setting out the joint commitment which would be completed with awarded LVEPs over the next few months.
22. SF commented on the need to ensure that sustainability and accessibility were included across the programme as were key to the future. LTS confirmed these would be embedded as core growth and performance principles, and were considered integral to the action plan and successful working of the DDP pilot.
23. NW commended the team on the progress made, and emphasised the importance of accreditation to the applicant, that it provided clarity on a much needed model. He suggested that a review mechanism should be incorporated to formally assess performance and underlined the importance of raising financial matters as part of that review. AS concurred that the structure will develop with review points (quarterly), and that the annual growth plan was also expected to be a timely review point.

4.3 Domestic data review

24. Richard Nicholls (RN) and Satpal Chana (SC) joined the meeting to seek approval on the proposed Domestic Data Review recommendations that had been shared with Board members. The key findings revealed that a mixed method approach would best meet user needs. It was recognised that timeliness and regional granularity needed to be improved from existing data sources, and that new data sources could add value e.g. card spending data and mobile data. ONS had agreed to combine the outbound component of International Passenger Survey with the domestic survey, which would achieve a significant cost savings that would be repurposed into acquiring new data sources. Progress was already being made on expanding data sources and scoping new sources, specifically to partner with industry. It was also recognised that the DMO review would offer new opportunities, by understanding user needs better and in turn, would establish new accessible data. NW acknowledged this as another benefit to the LVEP programme that should be amplified.

25. The Chair sought insight on the mechanisms used to gather national data and sought assurances that the most up-to-date data could now be reached. RN advised that card spend data would enhance the capture of national and regional level data, and that focus on behavioural data sources would achieve more timely data. SC supported this by confirming that the technology will be in place to compliment the model and would reduce the time to make data available.
26. AW recognised that this data, particularly where granular, could be a saleable proposition. AL suggested more clarity on what each project was aiming to deliver in order to visualise the opportunities; RN advised he could share a new data source plan that outlines more clearly the aim and achievements.
27. The Chair concluded that the Board agreed with the recommendations, and asked that the feedback from Board members was included in the future plan.

5.0 Deep dive

5.1 Accessibility

28. Ross Calladine (RC) was introduced to the Board and presented on the refreshed approach to leading and facilitating an accessible tourism industry. He underlined the key role was to lead industry towards achieving the ambition for the UK to become **the most accessible tourism destination in Europe by 2025** (Tourism Recovery Plan). The National Accessible Scheme (NAS) review has informed the next steps in order to give focus and recommended this scheme close as it no longer reflected the requirements of the target audience. A new phase of the Accessibility Guides initiatives, to provide a quality whole-of-industry solution, would now drive forward VE ambition. The opportunities linked to the LVEP Programme were acknowledged, which would enable learning modules hosted on the new England Academy and the expansion of the Destination Toolkit.
29. The Chair congratulated RC on his achievements as a recognised industry leader and on developments made to drive the ambition, and was keen to understand the audience that was being reached. RC advised steps were being made to broaden current engagement, to encourage our supporters to advocate our good practice. NW enquired on the feedback from NAS now it was closing. RC advised this had been managed carefully to protect relationships and were already involving this network in our new initiatives. AW observed the benefits of linking this to the LVEP Programme as a social return on investment, and whether advancements beyond accessibility could be linked to this. RC reassured that the network and other connections would keep abreast of the latest guidance, and noted the importance of clear focus whilst being sensitive to conflicts between groups.
30. SF volunteered to work with RC as VEAB lead on Accessibility. Board members welcomed the opportunity to advocate on accessible tourism and offered to support RC where possible.

6.0 Papers for noting/ comment

31. The Chair reported on the activity in relation to English Tourism Week and the enthusiasm that would be created through visits and speaking engagements during this time, and asked Board members for their continued support, particularly through social media.

7.0 Any Other Business

32. The Chair flagged that dates for the NED induction programme were available, and encouraged Board members to attend this if they had not already done so.
33. The Chair confirmed that the advert to recruit a permanent Chair of VEAB was now live and encourage Board members who were interested to come forward, and highlighted that one benefit from this role was enhanced information flows which would assist with executive careers.
34. The Chair asked Board members to return their appraisal forms as soon as possible.
35. AS raised that the Excellence awards were seeking Board members to agree the nomination for the award of outstanding contributions to tourism. Board members deliberated options and a recommendation was agreed.

The meeting closed at 1315.

The date of the next meeting is the 13th June 2023 at 1000.