



# Jersey Tourism

## A Year in Review 2010





## Jersey Tourism Annual Report

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# Foreword from the Minister for Economic Development

We should take much satisfaction from the performance of the industry in 2010 with an outcome which in terms of visitor numbers was very similar to the previous year despite the many external difficulties which affected the market.

Whilst it might have been possible to predict the ongoing financial crisis, the football world cup and the general election in our main market, the UK, the volcanic ash problem which closed airspace for days on end provided a challenge which we could not have anticipated and which not only cost the Island thousands of visitors but also had a dramatic affect on consumer confidence during the early Summer holiday booking period.

We are fortunate that during this crisis that we had ferry services as an alternative to the network of air routes to enable the repatriation of both visitors and local residents and that Condor were so accommodating in providing additional capacity.

The success and to a large extent the survival of the visitor economy is dependent upon the investment which the Government of Jersey makes in the destination marketing programme. This was again demonstrated in 2010 when a significant additional investment was made at the beginning of July to boost the high summer season which at that time was flagging in the wake of the problems.

The decision to invest in an unprecedented television campaign at the beginning of July to provide an immediate uplift in enquiries and subsequent bookings proved to be correct and the stimulus campaign is regarded by the members of the industry as the catalyst which saved the season.

Tourism statistics show that the shortfall which had been evident during April and May was eliminated and subsequently volumes reached and in fact slightly improved upon 2009 levels for the high season.

Business visitor levels which had been in decline since the beginning of the recession showed an upturn and from April, produced monthly increases which culminated in an end of year increase of 13.9%, some 9,000 visitors. The value of this market should not be underestimated as business visitors tend to be higher yield and are very welcome when yields in the leisure sector are being challenged.

The success and future development of the visitor economy is totally reliant on the quality and distribution of the transportation network. We are fortunate, particularly at a time when operators are facing such difficult financial circumstances, to have retained the large majority of our air and sea routes and even managed to add new services from both the UK and Germany.

I would like to take this opportunity of recognising the very valuable contribution to tourism made by industry members to the Tourism Development Fund, the Jersey Conference Bureau and the Tourism Marketing Panel. It is vital that we continue to benefit from the expertise which is provided to these bodies which enables planning and decisions to be made with input from as broad a range of industry as possible.

The 2010 event programme provided vitality, variety and diversity throughout the year and particularly during the Summer months. The Tour De Bretagne which has not previously taken place outside of France was a major highlight with many European professional teams providing a level of sporting achievement and competition rarely seen in Jersey. The coverage generated by the French media was also extremely valuable with television and press coverage throughout France.

The Air Display and Battle of Flowers once again proved to be major attractions which to no small degree is due to the efforts of the many volunteers who freely give their time and skill to ensure the success of these and other events.

The Industry in Jersey is diverse and interrelated and no one sector would survive and prosper without the others. It is therefore vital that we continue to work in partnership to build on our many strengths which are enhanced by the quality and beauty of the Island, coupled with the warmth of welcome which we consistently offer to our visitors.

I would also like to take the opportunity of recognising the contribution of my two Ministerial colleagues, Connétable Len Norman and Senator Paul Routier who join me in thanking all of the departmental staff for their superb efforts throughout the year.

**Senator Alan Maclean**  
**Minister for Economic Development**

## 2010 Annual Report

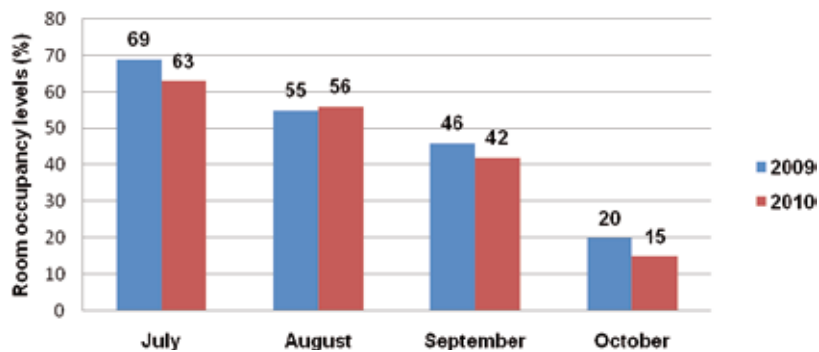
The success of the £550k stimulus funding marketing activity provided a double benefit for tourism in that not only did it produce the sales volumes which were so desperately needed, but it also showed that additional expenditure late in the season could achieve a very positive outcome.

The media breakdown for the additional advertising provided a £250k burst of national television which aired from the 1st July, national magazines with a budget of £89k during July and August, national press branding during July and August with a budget of £55k, a Classic FM radio campaign at £106k, and a direct mail campaign funded by the Jersey Hospitality Association valued at £50k.

The graph below shows the forward booking position as measured through the forward booking survey and clearly shows the improvement which took place as a result of the advertising campaign which commenced at the beginning of July.

At this time, forward bookings for Jersey's important peak period were looking weak compared to previous years.

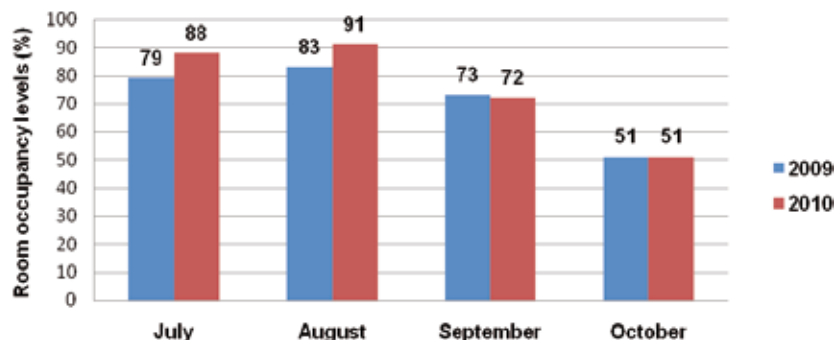
Room occupancy as at 1st July 2010 for the main season 2010 vs. 2009



### Actual Occupancy

Actual room occupancy following the deployment of the additional campaign activity for the same 4 months provide a significant improvement when set both against the earlier position and when compared with 2009.

Achieved room occupancy for the main season 2010 vs. 2009



### **Luxury Jersey**

During 2010 significant progress was achieved in the development of a relationship with the Luxury Jersey Hotel group which will lead to joint marketing in addition to promote the quality product of the members principally through the website. This is an initiative which is capable of further development and work is in progress to encourage other similar special interest sectors.

### **Industry Communications**

Tourism Week, the electronic newsletter published by the Department has increased its circulation to more than 2k recipients and has become a very important and well received information tool across the industry. Further industry wide communications were undertaken through speaker sessions with expert sessions which included customer segmentation and electronic mailing. These proved to be extremely popular and were well attended.

### **Transportation**

Jersey, in common with most other destinations, has a high level of dependency on its air and sea services. It is therefore of vital importance that routes are maintained with a significant effort being made to ensure that the network meets existing and future customer needs.

In 2010 a review of the Manche Iles service which operates from Granville and Carteret resulted in a new operator and a slightly reduced service, but one which was financially more viable for the Conseil de La Manche, who fund the operation. Most other ferry services operated as normal on both Northern and Southern routes producing an overall increase in passenger numbers of 3.3% and a very satisfactory 6% increase on the Southern route.

Air routes from Germany expanded with increased services by Air Berlin and Lufthansa from Dusseldorf and these are set to grow further as the German market continues to expand. The Paris air route continued to decline in the wake of competition from the sea routes.

From the UK, a new service from Bournemouth with BMI Baby unfortunately only lasted only a few weeks, but Jet 2 successfully operated a new Summer service from Blackpool. Overall, air arrivals were 1.8% down mainly as a result of reduced numbers from Heathrow and Gatwick.

### **David de Carteret**

**Director of Tourism & Marketing**

## Jersey Tourism Marketing 2010

The unprecedented global events in 2010 had a severe negative impact on the early marketing effort and bookings in the UK. Nevertheless, with the benefit of additional funding which enabled the Department to increase marketing during the summer months, and by working together with trade and accommodation providers, enquiries and bookings were boosted, in what was an exceptionally challenging year.

The timing of the main Summer campaign is critical; with the key holiday research and consideration period starting at Christmas and usually running for approximately 90 days before it peaks. Therefore, it is essential that Jersey is positioned as a holiday destination to core audiences at this time of increased opportunity.

The communications strategy for 2010 commenced in January with an outdoor poster campaign. This outdoor campaign consisted of 400, 48-sheet sites, which are the motorway-style posters and 250, 6-sheet sites. The sites were secured on major roads leading to key UK departure points. This media had been tested during spring 2009 with great results.

However, despite these marketing efforts, the first half of 2010 showed a major decline until the TV campaign was launched, timed to start as soon as the football World Cup finished in July. In total, 12.2 million adults saw one of the Jersey TV commercials and performance in terms of programme access, peak delivery and centre break opportunities were high across the campaign.

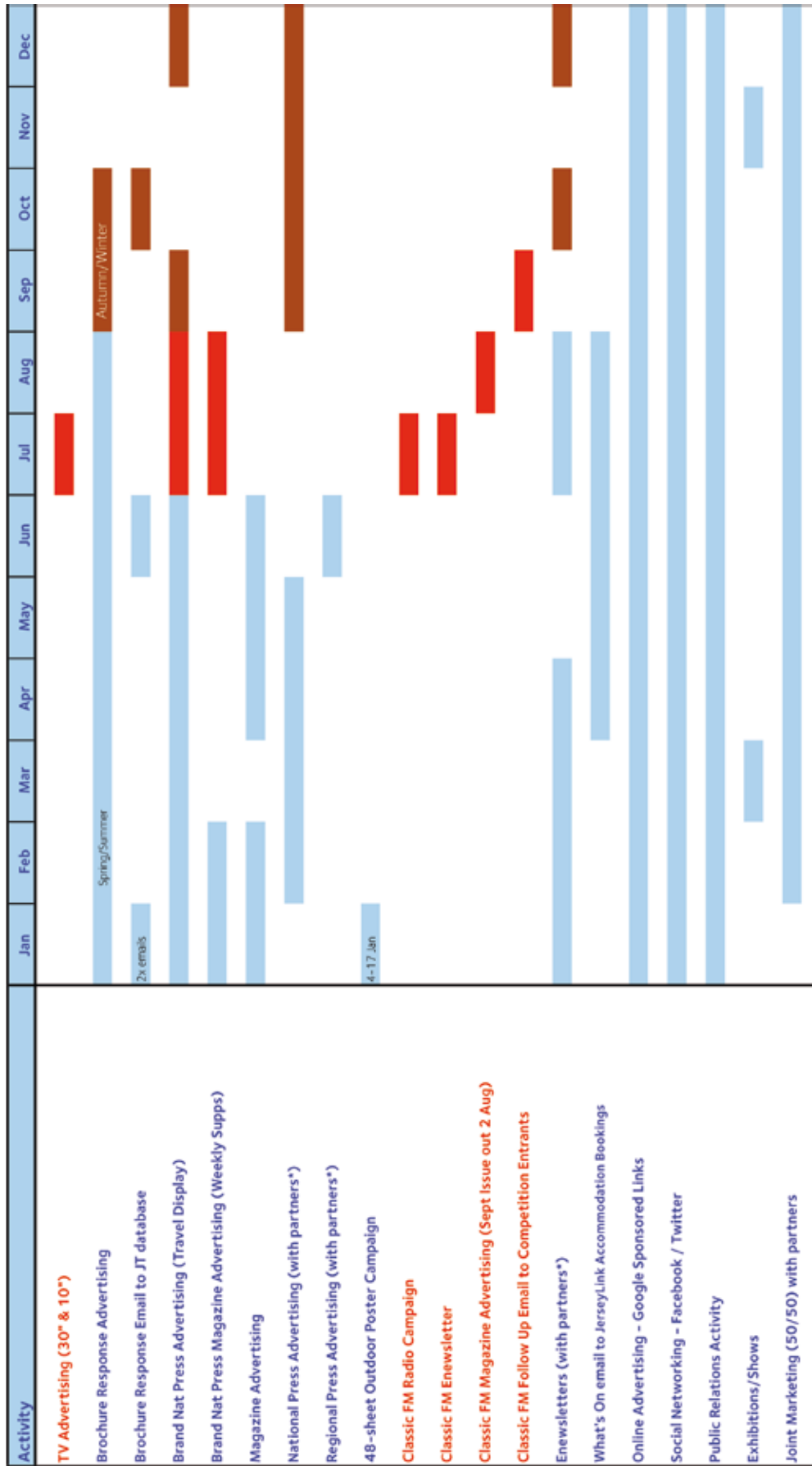
To support the outdoor campaign and TV, a national press campaign was deployed with nearly 200 advertisements across 14 newspaper titles, with a further 44 ads appearing in 19 magazine and supplement titles such as BBC Countryfile, Coast and Lonely Planet, together with online and email campaigns, which together generated 1.2 million website visits to jersey.com.

One of the benefits of the recession has been the decrease in the cost of advertising. This enabled the budget to gain a greater presence in the market compared to other competing destinations, with Jersey being the 4th highest spending destination in the British Isles and Guernsey being in 6th place.

During 2010, Jersey Tourism launched a number of new initiatives aimed at supporting tourism partners. The speaker series proved very popular with keynote speakers covering topical subjects such as email marketing, how to segment and target customers and social network marketing. The positive feedback from these events has resulted in a further speaker series being planned for 2011.

The Department also held a 'Meet the Team' event, giving tourism partners the opportunity to see and discuss both the planning and implementation of all aspects of the work and discuss how closer co-operation might be achieved, to enhance future marketing efforts. At the event, the new 'PartnerJersey' programme was launched, a marketing support programme designed to provide affordable marketing access to all local tourism businesses.

## JERSEY TOURISM 2010 UK CAMPAIGN ACTIVITY



\* Subject to demand

Media purchase expenditure:  
 Press & Magazine Advertising £554,000  
**Stimulus Funding Activity £450,000**  
 Outdoor Poster Campaign £120,000

## Public Relations Activity – 2010

Jersey celebrated another successful year of editorial coverage in 2010, with campaigns undertaken primarily in the UK, Ireland, France and Germany. Other international activity was conducted principally with industry partners and VisitBritain, the national agency promoting incoming tourism to Britain.

A key element of the PR campaign is the facilitation of media to the island. In 2010 the team facilitated visits covering 161 print media, 20 TV and 8 radio productions and 40 web sites. Other international media visits included those from Switzerland, Belgium, Spain, Finland, Czech Republic, China, Japan, Norway, Russia, Israel, Brazil, USA and Canada.

### UK

Seventy Seven was appointed to represent Jersey as the new UK PR agency at the beginning of the year, following an extensive review of public relations activity. The aims were to go beyond delivering some well-known truths about Jersey as a destination i.e. that it's clean, safe, scenic, relaxing.

A focus was to communicate a new sense of vitality about Jersey as an island delivering a clearer sense of 'brand Jersey' by finding some unpredictable ways of delivering the well-known, to really get some cut through in media relations and add some more unexpected and less predictable layers of communications.

Activity was conducted nationally and regionally, with tourism industry partners, in conjunction with the main Jersey Tourism advertising campaign.

#### Summary of exposure

- 738 articles generated
- Advertising equivalent value £6,852,802
- 428,863,940 opportunities to see
- Cost per thousand opportunities to see £0.39
- 65% of all UK adults were reached by the coverage. The audience most reached was one of our key target audiences, empty nesters, those whose children have left home

On average, UK adult and target audience members were exposed to Jersey Tourism UK coverage 12 times;

- 43% with a core message
- 62% with a brand message
- 63% with a call to action
- 30% of all national coverage was strongly favourable; driven by photographs of Jersey's landscape
- 71% of strongly favourable national pieces featured a photograph
- 62% of coverage featuring an event was strongly favourable, compared to 21% in 2009. This also exceeded the average proportion of strongly favourable articles for all 2010 coverage, demonstrating the positive nature of event coverage

### TV Coverage

Jersey received significant TV coverage again in 2010 which included:

- BBC One – ‘Countryfile’ with 7 million viewers
- BBC One – ‘The Apprentice’ winning team at the Atlantic
- BBC One – ‘Saturday Kitchen’ Shaun Rankin and Mark Jordan
- BBC Two – ‘Coast’ repeat of 2007 programme
- ITV – ‘GMTV’ weather campaign
- Five TV – ‘Gadget Show’ 1.4 million viewers
- Yesterday – ‘The Channel Islands at War’ John Nettles occupation documentaries
- Satellite TV – PGA Golf
- Sky – ‘Southern Softies’

### The Apprentice

Jersey Tourism worked in partnership with the Jersey’s Atlantic Hotel on their TV initiative with this highly popular BBC One programme. Lord Sugar’s prize for the week’s winners was a VIP trip to Jersey which included a gourmet lunch at the Atlantic Hotel and low water walk to the oyster beds.

Coverage surrounding Jersey generated an advertising equivalent of £341,292. All of these articles were strongly favourable and featured the ‘Gastronome’s Paradise’ message with the local produce described as ‘truly memorable’ Daily Telegraph Online.

Research has shown that people who take regular short break holidays are 3% more likely than the national average to tune into the BBC on a regular basis, showing that The Apprentice helped to maximize Jersey Tourism’s exposure to potential holiday makers.

The Mail Online, documenting a journalist’s trip following in the footsteps of The Apprentice winners, reported that ‘Jersey is a little slice of paradise’.

All print or online articles concerning the BBC’s, The Apprentice TV show, featured photography, boosting the favourability for ‘time out / indulgence’ coverage to 40% strongly favourable.

A further 80% of The Apprentice coverage included the [www.jersey.com](http://www.jersey.com) URL.

### Weather Campaign

Jersey Tourism established that all too often, Jersey was missed off the national weather map – given neither a weather marker nor a temperature symbol. Even worse, when the map was panned across the country, to view the regions, Jersey was also left off. How could anyone know how fabulous our Jersey weather is?

The team calculated the total loss that this low awareness of our weather might be having on its tourism industry – potentially running into millions of pounds. Research established that Jersey was given a temperature marker in just 30% of forecasts and the local weather was mentioned specifically in just 5% of national forecasts. A campaign which was launched, calling for the island to be put on the map, gathered 1,100 signatures of support.

The media response to the campaign was phenomenal! In total, 136 articles appeared across the UK media. All were supportive of the call for Jersey’s place on the map. Even the BBC covered the call for action with spokes people appearing on every national BBC radio station. Meanwhile, GMTV focused in on Jersey in their weather bulletins, giving us a dedicated forecast.

The weather campaign coverage accounted for 18% of all coverage for 2010.

On the BBC website, it was referred to as 'Sunshine PR success for Tourism'.

97% of all weather campaign coverage delivered at least one message, with 83% of articles delivering more than one message. This significantly exceeds the average percentage of articles to deliver a key message across the leisure industry of 56% (source: Metrica).

43% of empty nesters and 37% of all UK Adults were exposed to Jersey weather messages, an average of 4 times.

The weather campaign boosted delivery of the Jersey's 'sunshine culture' message, which featured in 62% of Jersey weather coverage, and consequently was the most prominent message in all coverage throughout the year, delivered in 39% of articles in 2010.

44% of coverage in the South East featured a Jersey brand message, five percentage points higher than the average for 2010. This was driven by the weather campaign and its claim that Jersey's sunny weather is not represented on British forecast maps.

The message was also boosted by positive summer reviews:

'With so much to offer and to explore, Jersey is a welcome break in a climate free from the hassle of Continental travel but with the sunshine associated with going abroad.' Your Dover

The weather campaign won the National Chartered Institute for Travel Marketing Award for 'Best Domestic PR Campaign 2010' and was short listed for the UK Chartered Institute of Public Relations 'Best Consumer Campaign' and 'Best Media Relations Campaign' Excellence Awards.

## France

The new Paris based public relations agency Jersey Tourism appointed in 2010, Agenda, achieved exceptional results. During the year 63 items were generated, totalling a readership of 95,427,597:

- Three TV programmes
- 35 on line articles
- 25 print articles
- National press 10
- Regional press 15

Highlights included items covering key product areas and subjects such as leisure cycling, quirky historic accommodation, Durrell, Jersey for families, Battle of Flowers, day trips and Fete de Noue.

### Amongst the media titles were;

Voyage.aol.fr, tourmagazine.fr, La Manche Libre, Ouest France, Tour Hebdo, L'Echo Touristique, Le Figaro Magazine, Ouestfrance.fr, France Soir, Cotes d'Armor, France 3, Madame Figaro, Les Inrockuptibles, L'Express, Tele 7 Jours Jeux, La Presse de la Manche and Agence Bretagne Presse.

## Tour de Bretagne

Jersey Tourism brought the Tour de Bretagne (TDB) to Jersey as part of its 2010 French and European marketing strategy.

The communications' reach from hosting the event and the ongoing increase in French business was exceptional. 24,000 French visitors had stayed in Jersey by the end of July, an increase of 13.4% on 2009, spending £5.52 million while in the island, an increase in market value of 19% in one year.

The campaign achieved an advertising value equivalent of £280,000 (€300,000) a return on investment of 4:1 on the £70,000 marketing budget and 75:1 on market value which included daily news coverage of the event France 3 TV.

The legacy of the event has extended to forging an alliance with Durrell as the race has adopted a gorilla as its mascot. Significantly the race has created a high level political entrée at Regional level of Brittany, having attracted the personal visit of President Jean Yves Le Drian.

### Germany

In Germany, where the direct destination advertising activity was limited to a national radio campaign and consumer newsletters, public relations play a major communications role.

Activity was conducted nationally and regionally, concentrating on catchment areas of direct seasonal and charter flights to the island, alongside joint travel trade promotions.

#### Results

- 908 articles were generated, an increase of 8% year on year
- Advertising equivalent value £5.26 million
- Circulation 61.5 million
- 153 million opportunities to see, nearly twice the population of Germany!
- The majority of the articles appeared in regional papers
- Around 12% were published in nation-wide publications; magazines, newspapers, radio, TV and on-line
- 73% of the total circulation, 44.6 million, has been achieved through nation-wide publications, 111.5 million opportunities to see the coverage
- The volume of articles from published press appeared in the months of March, May, July, with a peak in August featuring the Autumn Walking Week
- All publications in 2010 were extremely positive about Jersey

#### Key Stories

- 52% of all published articles featured the Autumn Walking Week
- 35% reported about the new publication of the German Island Guide
- 10% reported about the Battle of Flowers
- Others included gardens, the ITEX walk, sailing, kayaking and Durrell

#### TV broadcasts

Jersey reaped the benefits again this year from repeat broadcasts, plus some promotional trailers, for which we were only required to provide footage;

- WDR TV 'Frühling auf Jersey' (Spring in Jersey) a 10 minute broadcast produced by Andrea Tebart, during her visit in July 2003
- NDR TV 'Weltreisen: Jersey – Paradies im Ärmelkanal' (Paradise in the Channel) a 30 minute film produced by Edith Heitkampfer in May 2006, focusing on vintage cars and the beauty of the island. The broadcast attracted 50,000 viewers
- WDR TV 'Natur pur auf der Blumeninsel im Kanal' (Pure nature on the blooming island in the Channel) produced by Klaus Bergner in August 2009. Broadcast on 18th May it achieved £ 1.18 million in advertising equivalent value
- Sonnenklar TV – Five 30 second trailers including Jersey coast, countryside, Mayfair Hotel, Durrell and museums – 2,000 viewers
- Hessischer Rundfunk – 30 minute broadcast about the Channel Islands with 110,000 viewers

### Radio broadcasts

A number of radio features were broadcast including;

- 'INFOradio rbb' featuring the Berlin flight and connections with Air Berlin via Dusseldorf
- In cooperation with the nation-wide radio station 'Klassik Radio' Jersey was featured in a one hour broadcast plus competition – 2.9 million listeners
- In cooperation with Air Berlin, Jersey featured in a one hour radio broadcast including interviews in Antenne Dusseldorf and going on air in all Air Berlin airport lounges
- MDR radio 'Jersey – Blühende Kanalinsel im Frühjahr' (Blooming island in Spring) included an interview with Kiki Mueller our German PR agent, recorded on ITB 2010

## Product Development

Product Development has the primary objective of developing reasons to encourage new, and sustain existing visitor business to Jersey, to support the core values of Jersey's brand, enhance the visitor's on island holiday experience and increase on island spend.

The primary focus is on developing 'on brand' activity mainly in the shoulder months which is attractive to visitors – both potential visitors and those that have already chosen to visit. Jersey has a reputation for being a very real and genuine place, a beautiful natural destination that is seen as precious and unique. The brand promise is that those who visit will be enriched by the experience that is Jersey.

There are currently five areas of work;

- Longer term product development
- Developing programmes of activity throughout the year
- Developing a programme of festivals and events
- Supporting external event organisers, and;
- Creating promotional opportunities including PR exposure

### Long Term Product Development

Key product areas or 'tourism experiences' include heritage, food, floral, walking, soft adventure/active, art and culture – 'products' that Jersey has in abundance and which are of a really high quality.

The department has the objective of developing longer term 'products' to drive new business to the island. A major area of development has been the walking product. Initiatives such as the implementation of the green lane network and investment in walking routes, guided walks and walking festivals has resulted in 33% of visitors participating in scenic walks (2008 Visitor survey).

2010 saw the development of a new 'Channel Island Way' a 115 mile walk around five of the Channel Islands – Jersey, Guernsey, Alderney, Sark and Herm. This work will bear fruit in spring 2011 when the 'Way' will be launched.

### Annual Programmes of Activity

Each year programmes of activity are developed based on key tourism experiences. The aim is to expose a 'hidden' Jersey to visitors so they can experience island life and 'get under the skin' of the place. A good example of this is the guided walking programme which delivers over 300 guided walks per annum. The walks are the best means of exposing visitors to Jersey's heritage and culture including farm tours, occupation memories, food trails and access to private gardens and homes.

A development in 2010 was the 'Dawn and Dusk' programme – a series of events that took place at twilight. These activities were quirky and unique and included an event at dusk at St Catherine's Breakwater, evening tours around Corbière lighthouse, 'Moonwalks' on the East coast, ghost walks, sunset concerts and a concert at daybreak. The earliest activity was a 'Dawn Chorus' walk with Mike Stentiford MBE at 4.30am with over 80 participants. These activities were organised in conjunction with the National Trust for Jersey, local Blue Badge Guides and industry partners and were all very well received despite the time of day!

Over 40 local farm and craft markets have been staged at St Aubin and in the evenings throughout the Spring and Summer in Weighbridge Place. These provide animation, colour and activity and offer the visitor opportunities to purchase locally made artisanal goods and produce.

The programme includes the Howard Davis Park music programme and Jersey's entry into the Britain in Bloom event. In 2010, St Brelade won Gold in the European 'Entente Florale' and Grouville was nominated in the 'Champion of Champions' award – both extremely prestigious and which put Jersey very firmly on the international and national floral 'stage'.

### Festivals and Events

Jersey Tourism's existing event strategy is to drive business throughout the year through a programme of festival and events linked to key product areas. Events showcase the products that are available year round and celebrate what Jersey has to offer.

The Product Team within Jersey Tourism organises Liberation Day, Gorey Fete de la Mer, the Spring and Autumn Walking Weeks, June in Bloom, Jersey in Bloom, the Black Butter event at the Elms in conjunction with the National Trust for Jersey and La Fete de Noué. These festivals have been developed over the years, primarily in the shoulder months and are aimed at our target audience of 45+ higher spending couples.

Over 40 large events take place in Jersey each year.

## Visitor Centre

2010 brought the visitor numbers in the centre back to equivalent figures for 2006 ie over 125,000 visits showing an increase of nearly 2,000 over the previous year and with them an increase in net income of retail items (approximately £80k).

£4k of goods were despatched from the Visitor Centre prior to visitors arrival after having seen either the main guide or the Shop On Line.

Sales of the Jerseypass through the centre were up by 26% on those of 2009 with an increase in value of sales of £20k and we also experienced visitors buying them in 2010 for use in 2011 as they were now confident in the value of the product.

## The Conference Market

The conference and incentive market is one of the most competitive and competition has been intense. The economic climate affecting corporate events and the reduction in UK public sector events had resulted in large price discounting by venues in the UK provinces.

After an increase in 2009, due to several large forward booked association events, a reduction was anticipated. This was fairly minimal as residential conference delegates decreased from 9,241 in 2009 to 9,221 in 2010.

The number of events was 292 compared with 304 the previous year. The number of association delegates fell from 5,552 to 3,816. However the number of corporate delegates rose from 3,689 to 5,405.

The number of bed nights sold decreased to 33,363 from 38,097. This reduction is due to the difference in type of delegates. Association delegates tend to stay longer however their contribution to the local economy is not usually as large as corporate delegates.

# Financial Report

	2010 Actual £000	2009 Actual £000
<b>Corporate</b>		
Strategy and Policy*	587	1,053
Research and Planning	130	221
<b>Communications</b>		
Advertising and Media	2,176	2,181
Distribution	403	247
Marketing Services	572	540
Product Development	757	822
<b>Market Development</b>		
Public Relations	512	553
Trade Relations	668	691
Consumer and Media Relations	972	895
Visitor Services	385	301
<b>Net Revenue Expenditure</b>	<b>£ 7,162</b>	<b>£ 7,504</b>

\* 2009 Strategy and Policy restated - £79k grant to Bureau de Jersey transferred to Jersey Enterprise.

Note: The above figures include direct salaries and an allocation of Economic Development Department (EDD) overheads.

## Key Financial Results

Total revenue expenditure for 2010 was £7,162, a decrease of £342k (5%) compared with 2009.

### Corporate expenditure decreased by £557k (-44%)

The decrease in Corporate Strategy and Policy expenditure was mainly due to a reduction in route development (409k). In addition, there was a reduction in web development (£48k).

### Communications expenditure increased by £118k (3%)

The increase is mainly due to slight increases in digital marketing and development and Jersey Pass during 2010

Due to the ongoing difficult trading conditions that the island is experiencing an additional budget (500k) was received from the Economic Stimulus Fund for additional marketing spend.

### Market Development expenditure increased by £97k (4%)

The increase in Market development is partly due to a slight reduction of sales in the Visitor Services Centre and Central Reservations (50k) and an increase in advertising.

## **Notes on Volume and Value Calculations**

### **Visitor volume**

In order to calculate total visitor volume estimates, a year-long exit survey is commissioned which covers all air and sea routes departing from Jersey. This was first undertaken between 1997 and 1998 and then repeated in 2003, 2005, 2007 and 2009.

Due to the fast-changing nature of routes and passenger profiles, it was decided in 2003 to undertake the passenger exit survey every 2 years, with estimates being made in the intervening year based upon the previous year's results.

The most recent passenger exit survey was undertaken throughout 2009 and covered over 108,000 departing passengers (nearly 10% of total departing passengers by air and sea). The survey data provides a passenger breakdown on each route as follows:

- Resident, visitor or returning visitor (i.e. visited somewhere else during their stay in Jersey and therefore double counted in arrivals data)
- Purpose of visit, length of stay and country of residence

The methodology is very similar to that of the International Passenger Survey undertaken in the UK and interview shifts are carefully planned to reflect passenger throughput at the harbours and airport. A larger coverage of passengers is achieved in the Jersey survey, thus making the results more statistically reliable.

2010 visitor volume figures are based upon results from the 2009 exit survey.

### **Visitor expenditure**

Visitor expenditure estimates are based upon the most recent visitor expenditure survey undertaken in 2007 and applying Jersey's RPI figures for the ensuing years.

**N.B. The States Statistics Unit are familiar with and supportive of all methodologies used to calculate visitor volume and value.**

# SUMMARY OF TOP-LINE FIGURES 2005 - 2010

	<u>2005 Jersey Travel Survey</u>		<u>2007 Jersey Travel Survey</u>		<u>2009 Jersey Travel Survey</u>		
	<u>2005</u>	<u>2006</u>	<u>2007</u>	<u>2008</u>	<u>2009</u>	<u>2010</u>	<u>2010 vs. 2009</u>
<b>On-Island Visitor Expenditure</b>	<b>£220 million</b>	<b>£221 million</b>	<b>£234 million</b>	<b>£239 million</b>	<b>£226 million</b>	<b>£230 million</b>	<b>1.7%</b>
<b>On-Island Visitor Expenditure Reflated to 2010 levels</b>	<b>£260 million</b>	<b>£253 million</b>	<b>£256 million</b>	<b>£250 million</b>	<b>£230 million</b>	<b>£230 million</b>	<b>-0.1%</b>
<b>Total Tourism Visitor Volume</b>	<b>752,300</b>	<b>728,500</b>	<b>739,300</b>	<b>726,400</b>	<b>680,800</b>	<b>685,200</b>	<b>0.7%</b>
<b>Total bed nights sold over year</b>	<b>2.14 million</b>	<b>2.07 million</b>	<b>2.08 million</b>	<b>2.03 million</b>	<b>1.77 million</b>	<b>1.76 million</b>	<b>-0.6%</b>
<b>Total room nights sold over year</b>	<b>1.04 million</b>	<b>1.02 million</b>	<b>1.03 million</b>	<b>1.00 million</b>	<b>0.86 million</b>	<b>0.88 million</b>	<b>2.2%</b>
Staying Leisure Visitor Volume	380,900	368,200	375,900	362,300	338,500	335,150	-1.0%
Staying Leisure Visitor Average Stay	4.8	4.8	4.6	4.4	4.4	4.3	-1.1%
Staying Leisure Visitor On-Island Expenditure	£155 million	£155 million	£160 million	£158 million	£149 million	£149 million	-0.2%
Staying Leisure Visitor On-Island Expenditure Reflated to 2010 levels	£184 million	£178 million	£176 million	£166 million	£152 million	£149 million	-2.0%
Staying Business Visitor Volume	56,600	61,600	71,900	69,700	57,700	65,600	13.6%
Staying Business Visitor Average Stay	2.2	2.1	2.2	2.3	2.3	2.4	3.5%
Staying Business Visitor On-Island Expenditure	£17 million	£19 million	£24 million	£25 million	£21 million	£26 million	20.3%
Staying Business Visitor On-Island Expenditure Reflated to 2010 levels	£20 million	£21 million	£26 million	£26 million	£22 million	£26 million	18.7%
Staying Conference Visitor Volume	5,900	8,800	9,700	9,200	9,200	9,200	-0.2%
Staying Conference Visitor Average Stay	3.2	3.4	3.0	4.0	4.1	3.7	-11.4%
Staying Conference Visitor On-Island Expenditure	£3.1 million	£5.0 million	£5.3 million	£5.5 million	£5.6 million	£5.6 million	0.3%
Staying Conference Visitor On-Island Expenditure Reflated to 2010 levels	£3.8 million	£5.9 million	£5.9 million	£5.8 million	£5.7 million	£5.6 million	-1.4%
Day Trip Visitor Volume	145,700	139,400	141,900	143,200	134,500	135,300	0.6%
Day Trip Visitor On-Island Expenditure	£6.7 million	£6.3 million	£7.5 million	£7.9 million	£7.7 million	£7.8 million	1.5%
Day Trip Visitor On-Island Expenditure Reflated to 2010 levels	£7.2 million	£6.7 million	£8.0 million	£8.0 million	£7.7 million	£7.7 million	1.7%
Hospitality sector <u>companies</u> tax revenue <sup>1</sup>	5.9 million	5.3 million	5.5 million	n/a	n/a	n/a	
Hospitality sector jobs <sup>2</sup>	6,140	6,190	6,260	6,110	6,060	6,040	-0.3%
Registered accommodation establishments	166	161	159	145	142	141	-0.7%
Registered tourism bed spaces <sup>3</sup>	13,400	13,100	13,100	12,800	12,000	11,900	-1.2%
Total bed nights available over year	3,394,400	3,395,800	3,351,300	3,485,600	3,345,500	3,274,600	-2.1%
Average yearly bed space occupancy	63%	61%	62%	58%	53%	54%	+1 % point
Average yearly room space occupancy	70%	67%	69%	65%	58%	59%	+1 % point
August bed space occupancy	89%	82%	84%	83%	81%	85%	+4 % points
August room space occupancy	92%	88%	90%	87%	82%	91%	+9 % points
Total booking revenue generated by JerseyLink	£1.3 million	£1.5 million	£1.6 million	£1.2 million	£1.1 million	£1.0 million	-8.4%
Total visits to www.jersey.com <sup>4</sup>	n/a	n/a	n/a	920,300	1,287,700	1,451,900	12.8%

<sup>1</sup> Tax figures are based on "Income Tax Charged to Companies" and does not represent the whole of the tourism sector, or tourism's overall contribution to Jersey's economy. The Hospitality sector is defined by the Comptroller of Income Tax Hotels and Restaurants. Tax revenue from retail, transport and other service industries, together with indirect tax revenue from those servicing tourism related businesses is not included. Tax paid by individuals working within the industry is also not included.

<sup>2</sup> The Hospitality sector as defined by the Manpower Survey consists of tourism related accommodation, restaurants and bars. The figures are from the Manpower Survey, June 2010 (Statistics Unit). Again the hospitality sector alone does not constitute the full impact of tourism upon employment in Jersey.

<sup>3</sup> Includes hotels, guest houses, self catering, hostels and campsites registered with Jersey Tourism.

<sup>4</sup> Source: Google Analytics.

## Jersey Tourism 2010

This report is designed to give the reader an insight into and understanding of the Tourism Industry in Jersey, focusing on Visitor Volumes, Expenditure and Profile.

This report also covers registered bed stock, accommodation performance, JerseyLink Bookings, Internet Usage and Passenger Arrivals.

More detailed tables and information can be found in the appendices.

### 1. Tourism Volume and Expenditure Estimates

#### 1.1 Introduction

This section of the Annual Report outlines the volume and value of tourism to Jersey.

Visitor numbers are best estimates based upon passenger arrivals, completed visitor registration cards, declarations from various sources and the results of the Jersey Travel Surveys (see Section 9 – Guide to data sources).

Visitor Expenditure estimates refer to direct visitor spend whilst in Jersey and are based upon reflat results from the 2007 Travel Survey. Expenditure figures do not include passenger landing fees, travel to Jersey or revenue generated into the economy through employment and capital and/or revenue expenditure.

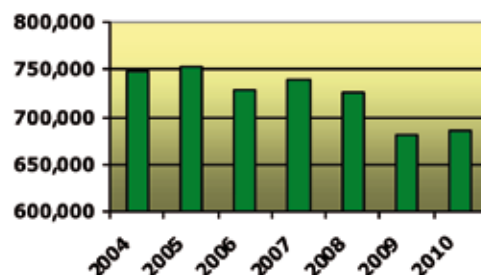
The following summary of 2010 results emphasises the importance and impact of the tourism industry in Jersey.

- 685,200 Visitors.
- 335,100 Visitors staying in paid accommodation for leisure purposes.
- 74% of staying leisure visitors were from the UK representing 81% of total staying leisure visitor bed nights sold.
- Almost 1.8 Million overnight stays (bed nights sold) in paid accommodation (excluding visiting yachts).
- £230 million estimated on-island visitor spend.
- £115 million estimated visitor spend on accommodation.

#### 1.2 Total Visitor estimates

Figure 1 below shows that the number of visitors increased by 1% from 680,800 in 2009 to 685,200 in 2010, following a fall of 6% between 2009 and 2008.

**Figure 1 Total visitor volume 2004-2010**

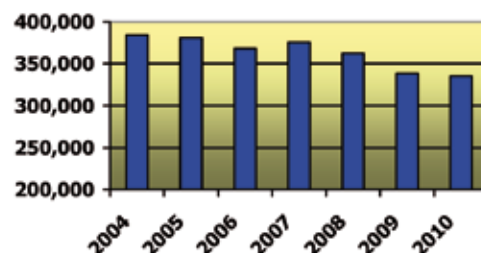


A full breakdown of total visitor numbers can be found in **Appendix 1** of the 2010 Annual Report at [www.jersey.com/marketinginfo](http://www.jersey.com/marketinginfo).

#### 1.3 Staying Leisure Visitors

Figure 2 below shows how total staying leisure visitor volume decreased by 1% from 338,500 in 2009 to 335,100 in 2010, following a fall of 7% between 2009 and 2008.

**Figure 2 Staying leisure visitors 2004-2010**



More detailed analysis of the staying leisure visitor market can be found in Section 2 (Profile of Staying Leisure Visitors), later in this report.

### 1.4 Visitors Staying with Friends and Relatives (VFR)

The number of visitors staying with friends and relatives decreased by -2.4% from 101,000 in 2009 to 98,600 in 2010. In addition to this, circa 5% of leisure visitors staying in paid accommodation claim a visit to friends and relatives as their main purpose of visit, with a further 6% claiming this to be a secondary purpose (Staying Leisure Visitor Survey 2008).

Based upon the 2009 Travel Survey it is estimated that 89% of the VFR market travelled to Jersey by air and the breakdown by country of residence was as follows:

**Table 1 Visiting friends and relatives (VFR) volumes by market 2010**

	Volume	%
UK	79,260	80%
Other CI	3,520	4%
Ireland	2,810	3%
France	2,970	3%
Portugal	1,490	2%
Other	8,560	8%

Those staying with friends and relatives spend slightly longer in Jersey than visitors in paid accommodation, with an average length of stay in 2010 of 6.1 nights. The VFR market therefore accounted for 601,520 overnights stays (bed nights) in Jersey in 2010.

### 1.5 Language Students

Visiting language student numbers increased by 10% from 2,680 in 2009 to 2,950 in 2010.

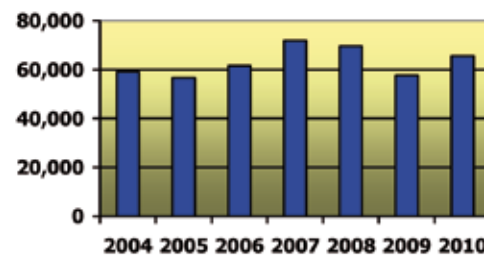
Language students in 2010 are estimated to have stayed in Jersey for an average of 16 nights, with the total market accounting for 46,000 nights. The majority of students stay with host families which puts a constraint upon the maximum size the language student market can achieve.

### 1.6 Business Visitors

The business market is estimated to have increased by 7.8% from 88,900 in 2009 to 95,900 in 2010.

In 2010 the number of staying (one or more nights) business visitors increased by 13.5% to 65,600, with business day visits decreasing by 3% to 30,300.

**Figure 3 Staying business visitors 2004-2010**



The increase in staying business visitor volume, coupled with a slight decrease in average stay accounted for 154,700 bed nights sold, 18% more than in 2009.

**Table 2 Staying business visitor volumes by market 2010**

	Volume	%
UK	55,900	85%
Other CI	2,130	3%
France	2,030	3%
Ireland	820	1%
Other	4,720	8%

### 1.7 Visiting Conference Delegates

Residential conference delegate numbers decreased marginally from 9,240 in 2009 to 9,220 in 2010.

The number of conferences decreased by 12 from 304 in 2009 to 292 in 2010. The number of Corporate delegates was 5,400, while the number of Association delegates was 3,800.

However, the number of bed nights sold decreased by 11.5% from 38,100 in 2009 to 33,700.

Further details can be obtained from Hamish Reid at the Jersey Conference Bureau.  
[www.jerseyconferences.co.uk](http://www.jerseyconferences.co.uk)

### 1.8 Visiting Yachtsman

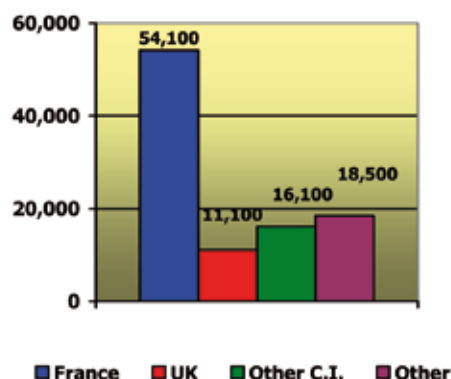
The number of visiting yachtsmen increased by 8.5% from 21,400 in 2009 to 23,200 in 2010, staying an average of 2.2 nights, slightly lower than in 2009.

Further details can be obtained from Jersey Harbours.  
[www.jersey-harbours.com](http://www.jersey-harbours.com)

## 1.9 Leisure Day Trips

Leisure day trip visits increased by 1.5% from 98,400 in 2009 to 99,900 in 2010.

**Figure 4**  
Breakdown of leisure day trip visitors by market



Source: 2009 Travel Survey

## 1.10 Visitor Expenditure Estimates

Total on-Island expenditure in 2010 is estimated at £230 million.

In real terms, if the total 2009 expenditure figures are reflatd to 2010 values, tourism expenditure in Jersey in 2010 decreased by 0.1%.

Table 2 shows a breakdown of estimated on-Island visitor expenditure by visitor type 2010 vs. 2009.

**Table 3 Total visitor spend 2010 vs. 2009**

	2009 value of market 000's	2010 value of market 000's	% change
Staying Leisure Visitors	£149,125	£148,778	0%
Visiting friends/relatives	£27,588	£27,033	-2%
Language students	£2,269	£2,678	18%
Leisure day visitors	£5,373	£5,493	2%
Visiting yachtsmen	£1,999	£2,091	5%
Business visitors	£23,275	£27,590	19%
Conference delegates	£5,596	£5,613	0%
Other visitors	£10,833	£10,689	-1%
<b>Total visitor spend</b>	<b>£226,059</b>	<b>£229,965</b>	<b>2%</b>

N.B. 2009 figures are not reflatd.

Table 3 shows a breakdown of estimated on-Island visitor expenditure per visitor by visitor type 2010 vs. 2009.

**Table 4 Spend per Visitor 2010 vs. 2009**

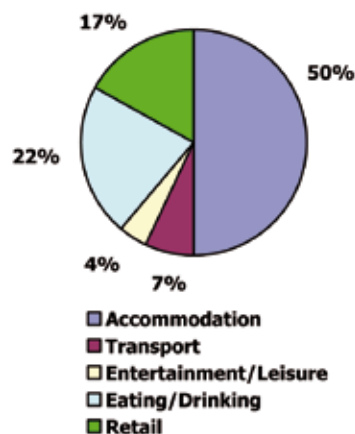
	2009 spend per visitor	2010 spend per visitor	% change
Staying Leisure Visitors	£441	£444	1%
Visiting friends/relatives	£273	£274	0%
Language students	£846	£908	7%
Leisure day visitors	£55	£55	1%
Visiting yachtsmen	£93	£90	-4%
Business visitors	£262	£288	10%
Conference delegates	£606	£609	1%
Other visitors	£522	£525	1%
<b>Average spend per visitor</b>	<b>£332</b>	<b>£336</b>	<b>1%</b>

N.B. Figures have been rounded.  
N.B. 2009 figures are not reflatd.

## Breakdown of on-Island visitor spend 2010

The 2007 Travel Survey asked respondents how much they had spent on various aspects of their visit. This makes it possible to break down estimated visitor expenditure into the following categories:

**Figure 5 Breakdown of on-Island visitor expenditure 2010 - £230m**



Source: 2007 Visitor Expenditure Survey

The above shows that half of visitor expenditure is on the accommodation element of a stay in Jersey, although this percentage is reduced by visitors who do not stay in paid accommodation (VFR, day trips etc.). 22% of visitor expenditure is spent in restaurants, pubs and cafés, 7% on on-Island transport, and 17% on miscellaneous items which are mainly retail.

Visitor expenditure estimates are based upon the most recent visitor expenditure survey undertaken in 2007, but reflatd to 2010 using Jersey's RPI.

### 1.11 Tax Revenue

The following figures show estimates of the tax contribution of the hospitality sector for the years 1999 to 2007.

**Table 5. Tax revenues from companies**

<b>1999</b>	<b>£5.9 million</b>
<b>2000</b>	<b>£5.2 million</b>
<b>2001</b>	<b>£4.9 million</b>
<b>2002</b>	<b>£5.0 million</b>
<b>2003</b>	<b>£5.0 million</b>
<b>2004</b>	<b>£5.9 million</b>
<b>2005</b>	<b>£5.9 million</b>
<b>2006</b>	<b>£5.3 million</b>
<b>2007</b>	<b>£5.5 million</b>

In 2007, tax revenues from companies in the hospitality sector (strictly "Hotels, restaurants and bars") was £5.5 million which represented 2.3% of total income tax from companies. By far the largest contribution to tax comes from the finance sector.

Tax figures are accrued one year in arrears and do not represent the whole of the tourism sector, or tourism's overall contribution to Jersey's economy.

The Hospitality sector is defined by the Comptroller of Income Tax as all "Hotels, restaurants and bars". Tax revenue from retail, transport and other service industries, together with indirect tax revenue from those servicing tourism related businesses is not included.

*Tax revenue figures for previous years have not been reflatd for direct comparison with 2007.*

## 2. Profile of Staying Leisure Visitors

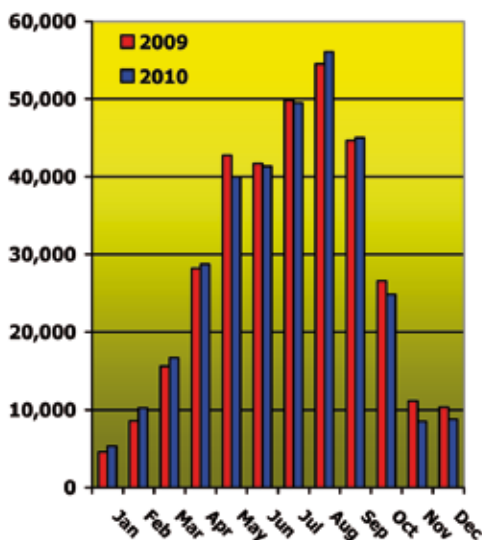
The following tables concentrate on **staying leisure visitor** trends, with the data derived from those visitors staying in registered accommodation that filled in visitor registration cards and stated that their main purpose of visit was "holiday" or "sport".

### 2.1 Visitors by Month

As volumes are measured based on the day of arrival, some months are affected by changes in the number of weekends falling within the month in a particular year.

Figure 5 shows that 2010 visitor numbers started off better than 2009, but May performance was down. August visitor numbers showed an increase on 2009, but from October onwards there were year-on-year decreases.

**Figure 6 Staying leisure visitor arrivals by month 2009 and 2010.**



Source: Visitor registration cards

Different markets have different seasonal visit patterns. The French market shows higher peaks in April, May and June, and the markets reliant upon summer charter services show a relatively smaller season from June to September.

### 2.2 Party Composition

The table below shows a breakdown of adults and children under 16 by source market.

**Table 6 Staying leisure visitors - 2010 party composition.**

	Adults (over 16)	Children (under 16)	Total Visitors
UK	233,250	16,410	249,660
Ireland	4,020	360	4,380
Other CI	15,070	1,370	16,440
France	33,130	3,780	36,910
Germany	10,440	360	10,800
Benelux	4,680	420	5,100
Other	11,330	530	11,860
<b>Total</b>	<b>311,920</b>	<b>23,230</b>	<b>335,150</b>

In 2010, children accounted for over 6.9% of total staying leisure visitors, a slightly smaller percentage than in 2008 and 2009.

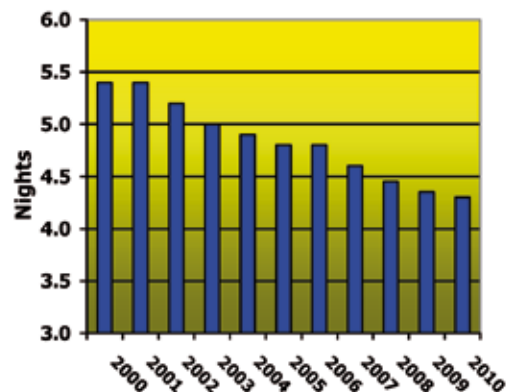
### 2.3 Average Length of Stay

Like the majority of destinations, Jersey has experienced a general trend towards shorter stay breaks and multiple holiday taking.

*For a more detailed breakdown of lengths of stay by market please refer to **Appendix 6***

The following graph illustrates the overall trend from 2000 to 2010.

**Figure 7 Staying leisure visitors – average stay 2000-2010**



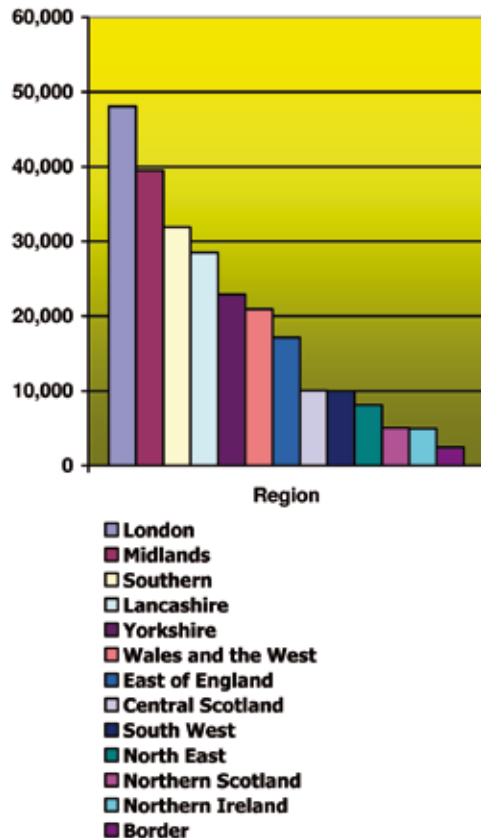
Source: Visitor registration cards

## 2.4 Region of Residence

### 2.4.1 UK

UK postcodes have been data inputted from completed visitor registration cards. From the postcode it has been possible to continuously measure changes in the regionality of UK visitors.

**Figure 8 Volumes of staying leisure visitors from the UK by ISBA region in 2010**



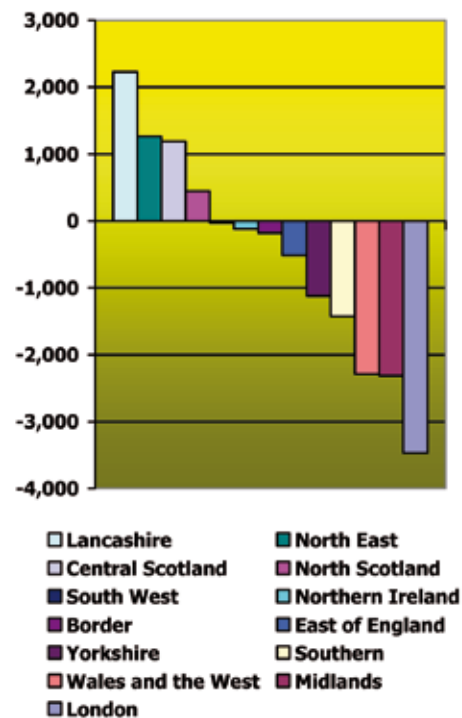
There have been some significant changes in the regional distribution of visitors by ISBA region between 2005 and 2010. These changes are partly reflective of the changes to capacity on certain routes and of some new routes being introduced, as well as discontinued routes.

Table 6 and Figure 8 opposite show the changes in volumes of visitors by ISBA region between 2010 and 2009.

**Table 7 Visitor volume changes 2010 vs. 2009**

Lancashire	2,230
North East	1,260
Central Scotland	1,190
North Scotland	450
South West	-30
Northern Ireland	-120
Border	-180
East England	-510
Yorkshire	-1,120
Southern	-1,430
Wales & West	-2,290
Midlands	-2,310
London	-3,470

**Figure 9 Visitor volume changes 2010 vs. 2009**



Compared to the UK's population distribution, Jersey had highest penetration in 2010 in the Southern, Southwest and Wales & West regions, followed by the Midlands, East England and London regions.

In 2010, 48% of Jersey's visitors came from the London, Midlands, and Southern regions.

For more detailed analysis of the ISBA region profiles, please refer to the **Appendix 3**.

## 2.4.2 France

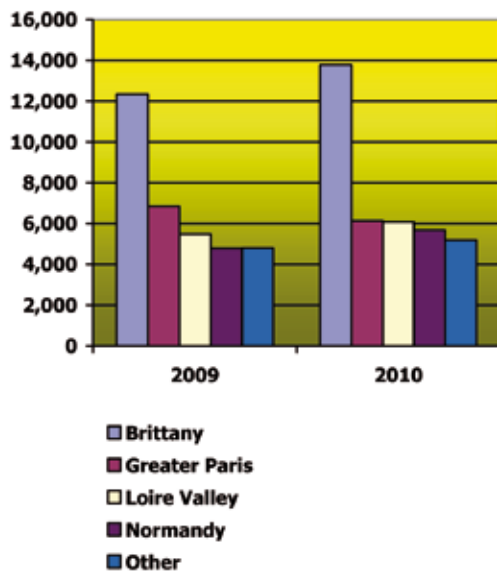
The first two digits of French postcodes from returned visitor registration cards have also been captured so that a continuous monitor of visitors from French Départements has been possible. Départements are grouped into French regions.

Table 7 and Figure 9 show the distribution of French staying leisure visitors between 2009 and 2010.

**Table 8 French visitors by region 2010 vs. 2009**

	2009	2010	Change 10/09	Change 10/09
Brittany	12,330	13,800	12%	1,470
Greater Paris	6,850	6,140	-10%	710
Loire Valley	5,480	6,090	11%	610
Normandy	4,790	5,690	19%	900
South East	890	1,200	3%	310
South West	860	920	2%	60
Other	3,060	3,070	0%	10
<b>Total</b>	<b>34,260</b>	<b>36,910</b>	<b>8%</b>	<b>2,650</b>

**Figure 10 French visitors by region 2010 vs. 2009**



For more detailed analysis of the French regional profiles, please refer to the **Appendix 4**.

## 2.5 MOSAIC Profile of UK Staying Leisure Visitors

MOSAIC profiling is a system based upon UK postcodes to classify the types of UK visitor to Jersey.

Table 9 shows the geo-demographic profile of visitors to Jersey in 2010. The higher the index figure (this is the proportion of Jersey visitors compared to the UK population for each Mosaic Group), the more likely Jersey is to attract visitors from that particular Mosaic group.

**Table 9 Mosaic groups of UK visitors 2010**

MOSAIC Group	% UK Households	Jersey Visitors	Index 2010
<b>Symbols of Success</b>	9.6%	19.8%	<b>2.1</b>
<b>Happy Families</b>	10.8%	12.2%	<b>1.1</b>
<b>Suburban Comfort</b>	15.1%	21.6%	<b>1.4</b>
<b>Ties of Community</b>	16.0%	11.3%	<b>0.7</b>
<b>Urban Intelligence</b>	7.2%	5.6%	<b>0.8</b>
<b>Welfare Borderline</b>	6.4%	1.6%	<b>0.3</b>
<b>Municipal Dependency</b>	6.7%	1.8%	<b>0.3</b>
<b>Blue Collar Enterprise</b>	11.0%	6.4%	<b>0.6</b>
<b>Twilight Subsistence</b>	3.9%	1.8%	<b>0.5</b>
<b>Grey Perspectives</b>	7.9%	9.4%	<b>1.2</b>
<b>Rural Isolation</b>	5.4%	8.2%	<b>1.5</b>

For more detailed analysis and definitions of the Mosaic profiles please refer to **Appendix 5**.

## 2.6 Additional Visitor Profiling

The most notable points from the tables are that:

- The average length of stay fell from 4.35 nights in 2009 to 4.30 nights in 2010. The average stay for UK visitors fell from 4.75 nights in 2009 to 4.70 in 2010.
- The percentage of visitors booking their holiday through a tour operator was 49% in 2010; representing a slight fall from 52% in 2009 and 53% in 2008.
- The percentage of first time visitors in 2010 increased from 45% to 49%. This figure had been consistent over the previous 4 years.
- In 2010 there was a continued increase in the proportion of visitors booking at short notice. 36% of visitors booked less than one month before arrival compared to 35% in 2009.
- Between 2006 and 2010 the percentage of staying leisure visitors travelling by air to Jersey has consistently hovered around the 72-73% mark. In 2010 71% of staying leisure visitors travelled to Jersey by air.
- There had been a gradual increase in the average age or age profile of staying leisure visitors in previous years. This trend reversed in 2003 with the overall average adult age dropping to 52 years and, since 2003 the average adult age has remained at 53 to 54 years. It is also noteworthy that UK visitors are generally older than most European visitors.

*For more detailed analysis of visitor profiles by market, please refer to **Appendices 6, 7 and 8.***

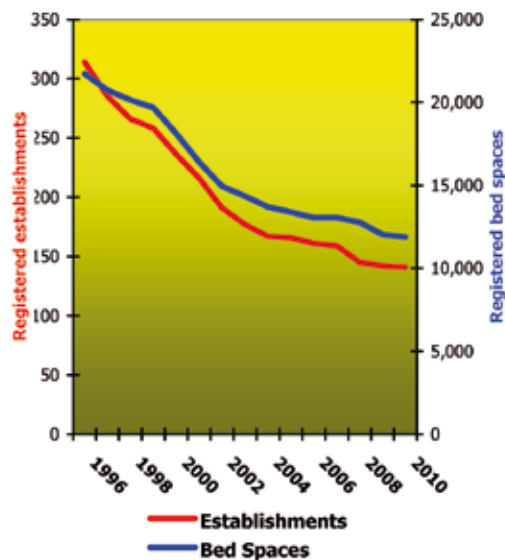
### 3. Registered Bed Stock

In recent years, Jersey's registered tourist bed stock has undergone some major changes. Total bed space capacity reached a peak of over 27,000 in the mid 1970's, with guest houses accounting for over a third of this total. A total capacity of over 27,000 bed spaces was maintained until the late 1980's.

The increasingly competitive climate in the tourism market and on-Island pressures for housing led to a sharp decline in registered tourist establishments and bed spaces throughout the 1990's.

However, in recent years the decline has slowed, although the registered number of bed spaces is still falling.

**Figure 11 Registered establishments and bed spaces 1996-2010**

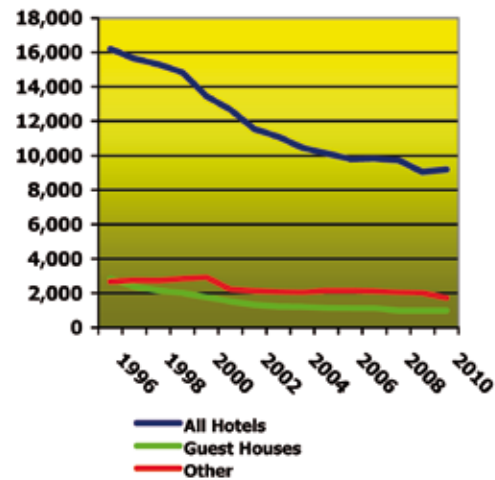


**In 2010, Jersey had 141 registered establishments, representing 11,900 tourist bed spaces.** Hotels accounted for 77% of the total bed stock in 2010.

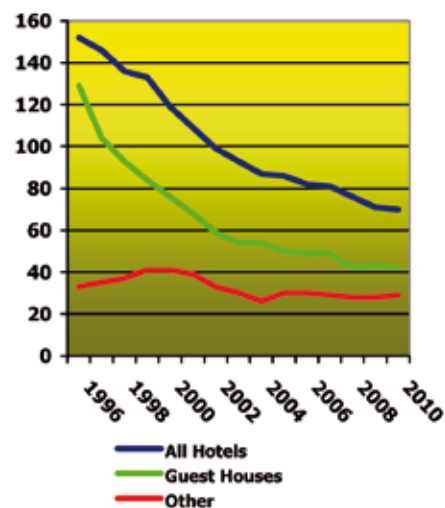
Compared to 2009, the number of bed spaces increased for hotels, guest houses and self-catering. However, a fall in camping spaces meant an overall decline in registered tourist bed spaces.

Figures 11 and 12 demonstrate that the largest fall in bed spaces has occurred in the hotel sector and that the largest fall in establishment numbers has been in the guest house sector. This has inevitably resulted in an increase in the average number of bed spaces per establishment from 64 in 1993 to 84 in 2010.

**Figure 12 Distribution of bed spaces 1996-2010**



**Figure 13 Distribution of establishments 1996-2010**



More detailed data with regard to registered bed stock and establishments can be found in **Appendix 9**.

#### 4. Accommodation Performance Indicators

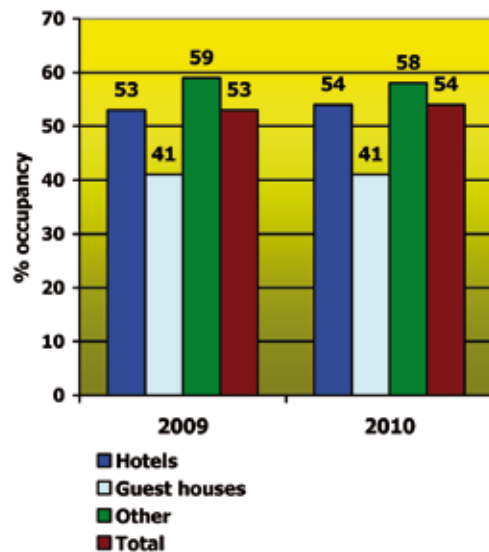
This section shows the performance in terms of bed and room nights sold, and occupancy levels achieved, in the accommodation sector.

Bed and room nights available are a measure of the number of registered bed spaces and rooms multiplied by the number of days an establishment is effectively trading for "tourism" purposes. A number of establishments are effectively trading as residential lodging houses for part of the year and are therefore excluded from the figures during those periods. Bed space and room occupancy is a measure of bed spaces and rooms occupied versus bed spaces and rooms available.

#### 4.1 Bed Occupancy

By taking into account Jersey's total beds available (open), and comparing the estimated numbers of staying visitors and their respective lengths of stay, shows the following estimates for total bed space occupancy 2010 vs. 2009.

**Figure 14 Bed space occupancy 2010 vs.2009**

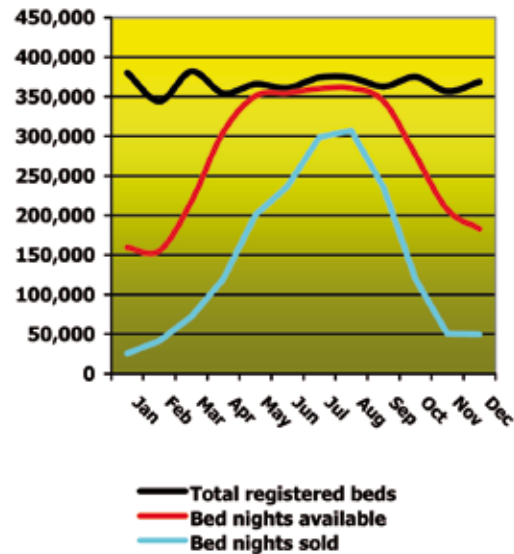


In 2010, total bed space occupancy averaged 54%, compared to 53% in 2009. Bed nights sold in all accommodation decreased by 0.6% to 1,755,400 and total bed night availability fell by 2.1% to 3,274,600.

#### 4.1.1 Monthly Occupancy

Figure 14 illustrates the seasonality of tourism in terms of registered beds, the number of beds that are available (open) for tourism purposes and number of bed nights sold across the year.

**Figure 15 Bed spaces**

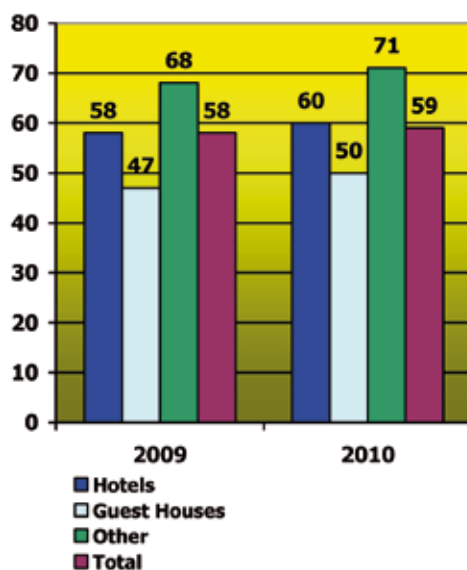


## 4.2 Room Occupancy

Since 2001 Jersey Tourism has also measured room occupancy. Many operators prefer to use room occupancy data as opposed to bed occupancy data and many like to use both. Jersey Tourism will continue to provide both room and bed data in its Annual Report as well as in its monthly reports.

By taking into account Jersey's total room capacity, and comparing the estimated numbers of staying visitors and their respective lengths of stay, the following shows estimates for total room occupancy 2010 vs. 2009.

**Figure 16 Room space occupancy 2010 vs. 2009**



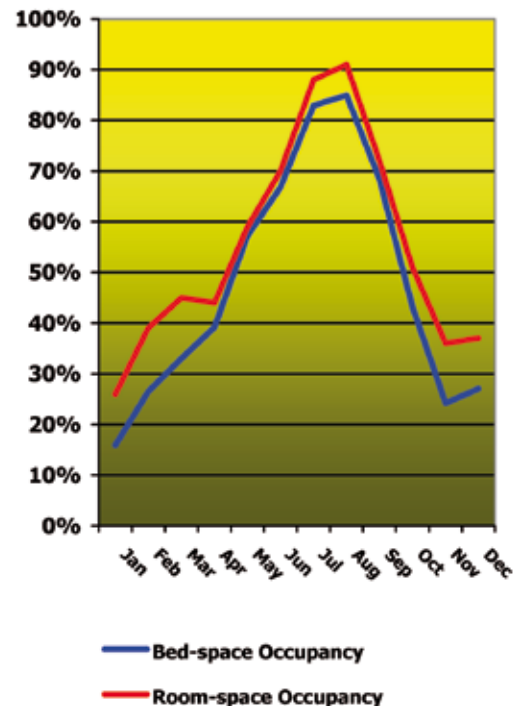
In 2010 total room occupancy averaged 59%; a slight rise from 58% in 2009. Rooms sold in all accommodation increased by 2.2% to 881,800 while total rooms available decreased by 0.2% to 1,483,300.

For more detailed data with regard to *bed and room space occupancy* please refer to **Appendices 10 and 11**.

## 4.3 Room vs. Bed Occupancy

Figure 16 shows how room occupancy is much higher in most months outside the main summer season. This illustrates the importance of business and conference tourism, where the majority of overnight stays are based on single rooms or single-occupied rooms; and represents a higher proportion of room sales compared to staying leisure visitors.

**Figure 17 Bed and room occupancy 2010**



## 5.1 JerseyLink Bookings

JerseyLink is a computerised accommodation central reservations system set up by Jersey Tourism to enable industry partners to sell any spare room capacity they might have. Circ. 90% of Jersey's registered bed stock has computer access to the system.

**Table 10 Jersey Link bookings 2010 vs. 2009**

Number of bookings	2009	2010	10 vs. 09
<b>Hotels</b>	2,374	2,395	1%
<b>Guest Accommodation</b>	1,831	1,625	-11%
<b>Self Catering</b>	144	112	-22%
<b>TOTAL</b>	<b>4,349</b>	<b>4,132</b>	<b>-5%</b>

Number of visitors	2009	2010	10 vs. 09
<b>Hotels</b>	4,972	5,183	4%
<b>Guest Accommodation</b>	3,779	3,496	-7%
<b>Self Catering</b>	429	313	-27%
<b>TOTAL</b>	<b>9,180</b>	<b>8,992</b>	<b>-2%</b>

Number of bed nights	2009	2010	10 vs. 09
<b>Hotels</b>	16,220	15,317	-6%
<b>Guest Accommodation</b>	12,045	10,443	-13%
<b>Self Catering</b>	2,176	1,513	-30%
<b>TOTAL</b>	<b>30,441</b>	<b>27,273</b>	<b>-10%</b>

Revenue	2009	2010	10 vs. 09
<b>Hotels</b>	£709,695	£661,222	-7%
<b>Guest Accommodation</b>	£375,778	£342,851	-9%
<b>Self Catering</b>	£60,073	£45,249	-25%
<b>TOTAL</b>	<b>£1,145,546</b>	<b>1,049,322</b>	<b>-8%</b>

The above tables show a 5% decrease in bookings, resulting in a 2% decrease in visitors and 10% decrease in bed nights sold through the system. Revenue in 2010 decreased by 8% to £1,049,300 compared to 2009, producing an average per person per night rate of £38.47, an increase on 2009 of £0.84 (+2%). Average party size increased slightly to 2.2 people, and average stay was down from 3.3 to 3.0 nights in 2010. Average length of stay is less for Jersey Link bookings than the overall staying leisure visitor average of 4.3 nights.

JerseyLink bookings accounted for 1.6% of total bed nights sold in 2010, compared to over 1.7% in 2009.

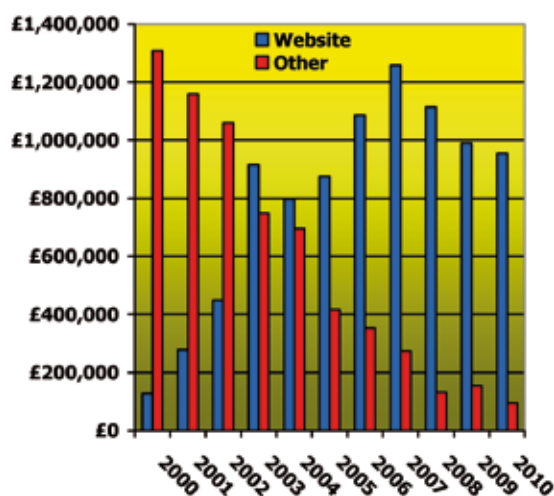
The tables also demonstrate the importance of Jersey Link to the guest house sector, where the number of bookings is disproportionate to the number of beds represented within the sector.

## 5.2 JerseyLink Bookings on the Internet

- 86% of all JerseyLink bookings were made on the Internet in 2010 compared to 80% in 2009, 80% in 2008, 76% in 2007, 70% in 2006, 60% in 2005, 45% in 2004, 48% in 2003, 26% in 2002, 15% in 2001 and 7% in 2000.
- 91% of all JerseyLink booking value was made on the Internet in 2010, compared to 86% in 2009, 86% in 2008, 82% in 2007, 75% in 2006, 68% in 2005, 53% in 2004, 55% in 2003, 30% in 2002, 19% in 2001 and 9% in 2000.

The average revenue per internet booking was £269 compared to £161 for other bookings made through JerseyLink. This further highlights the importance of the internet.

**Figure 18**  
**JerseyLink Bookings Revenue 2000 – 2010**



More detailed data can be found in **Appendices 12 and 13**.

## 6. Internet Usage

The internet has become a very successful tool in enhancing the way people plan and book their holidays and it will continue to rapidly change the structure of the travel trade as more consumers get access to this channel of communication.

### 6.1 [www.jersey.com](http://www.jersey.com)

Jersey Tourism has its own website, [www.jersey.com](http://www.jersey.com), which went live in March 1999. A new version of the site was launched in April 2008, and the software that tracks site usage was upgraded. Direct year-on-year comparisons are therefore subject to changes in the way in which the data has been collected.

In 2010, there were nearly 1.5 million "Total Unique Visitors" (Google Analytics) to the site.

### 6.2 Internet usage by Jersey visitors

**Table 11 Internet usage by Jersey staying leisure visitors, 2000 - 2008**

	Have internet access and have used it for holiday information			
	2000	2004	2006	2008
UK	32%	51%	64%	70%
Ireland	41%	67%		
Guernsey	38%	75%		
France	33%	72%	84%	
Germany	39%	66%	77%	
Netherlands	45%	81%		
Belgium	49%	67%		
Switzerland	54%	73%		

Source: Staying Leisure Visitor Surveys

	Have internet access but have not used it for holiday information			
	2000	2004	2006	2008
UK	15%	6%	4%	5%
Ireland	18%	7%		
Guernsey	21%	2%		
France	14%	6%	3%	
Germany	13%	6%	5%	
Netherlands	21%	6%		
Belgium	12%	6%		
Switzerland	12%	6%		

	No internet access and never used it for holiday information			
	2000	2004	2006	2008
UK	53%	43%	32%	25%
Ireland	41%	26%		
Guernsey	41%	23%		
France	53%	22%	13%	
Germany	48%	28%	18%	
Netherlands	34%	13%		
Belgium	39%	27%		
Switzerland	34%	21%		

Source: Staying Leisure Visitor Surveys 2000, 2004, 2006 & 2008

NB. The 2008 survey was for UK visitors only.

It is evident from earlier surveys that Jersey's European visitors have a higher level of internet access than their UK counterparts. Significant increases between 2000 and 2006 in access and use for holiday information have been recorded in all countries. It is notable that there has been a greater level of growth in access and use for holiday information by European than by UK visitors. The overall increase in use of the internet as a holiday planner and source of information can be partly attributable to the improved quality of specialised travel, low cost travel and destination websites.

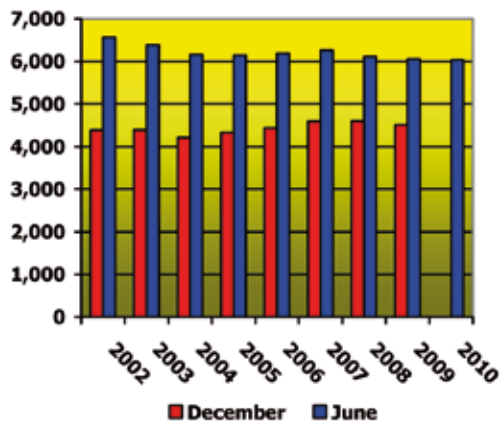
## 7. Employment in the Hospitality Sector

The figures within this section are provided by the States Statistics Unit quarterly Manpower Survey, in which almost all businesses in Jersey report the number of staff employed in their undertaking. For a number of reasons it is not possible to accurately determine the total number of jobs in Jersey that are dependent upon the tourism industry, but employment in hotels, restaurants and bars will give a broad approximation to the employment directly generated by tourism.

### Manpower Returns

Figure 20 below shows the number of employees in the hospitality sector between 2002 and 2010. From 2002 to 2004 the underlying trend in employment had been downward, but the rate of decline slowed, and in both 2006 and 2007 employee numbers increased slightly. There was, however, a small decrease in 2008 of 150 and further decreases in June 2009 and 2010 of 50 and 20 employees respectively.

**Figure 19 Total staff employed in the hospitality sector 2002 – 2010**



Source: States Statistics Unit

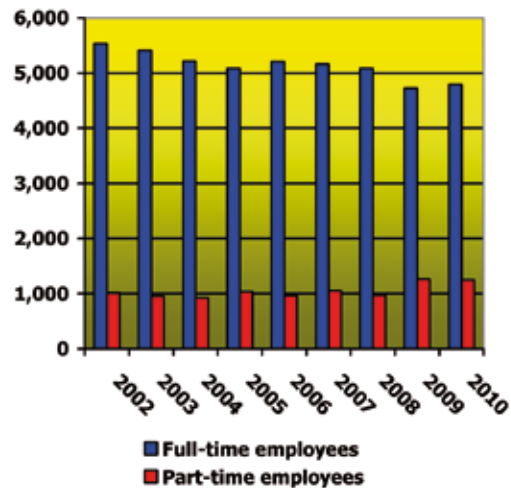
The difference between the number of staff employed in June 2010 and December 2009, some 1,530, would indicate the seasonal nature of tourism employment. The equivalent figure in 2009 was 1,460.

Measured against staff employed in all sectors, the percentage attributable to the hospitality sector has fallen from 17% in June 1997 to 13% in June 2009 and 12% in June 2010. In recent years there has been a steadying in the numbers of staff employed since numbers began to fall in the 1990's.

Figure 21 below shows how the decline in hospitality sector employment since 2002 has been in full-time employment rather than in part-time employment. In 2010, both full-time and part-time employment was at a very similar level to 2009.

In 2002, full-time employees accounted for 85% of all those employed in hotels, restaurants and bars, compared to 79% in 2010.

**Figure 20 Full-time vs. part-time posts (June) 2002 – 2010**



Source: States Statistics Unit

For more detailed information please visit The Statistics Unit's website at [www.gov.je/statistics](http://www.gov.je/statistics)

## 8. Passenger Arrivals

In 2010, passenger arrivals through Jersey's airport decreased by 13,600 (1.8%) and passengers through Jersey harbour terminals increased by 12,100 (2.2%).

Figure 22 details a breakdown of arrivals by air and sea against the total for each year.

**Figure 21 Total passenger arrivals 2002 – 2010**

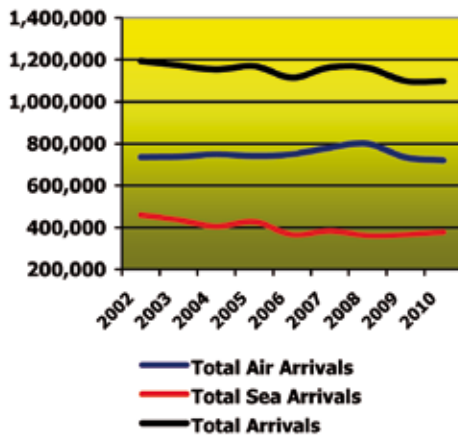
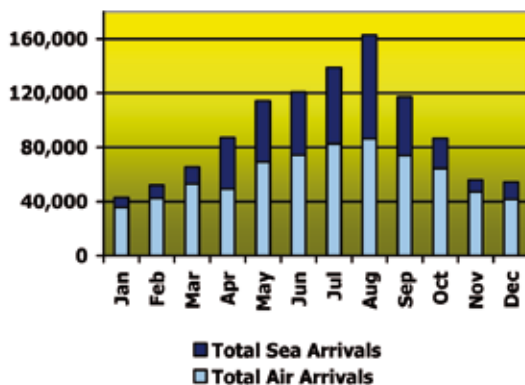


Figure 23 shows arrivals by month during 2010. The pattern of higher arrivals during the summer months reflects the seasonality of the "tourist" season.

**Figure 22  
Total air & sea arrivals by month for 2010**



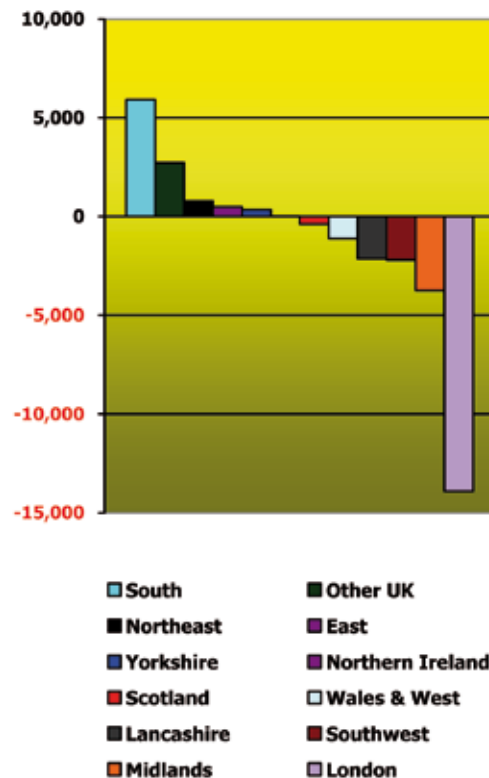
As in recent years, 2010 again saw some significant changes in arrivals patterns.

5 regions showed increases in passenger arrivals, compared with 2009 where only 2 increased. The highest increase was in the South (almost 6,000 more). This is due to the increase in air arrivals from Bournemouth and Southampton.

Passenger arrivals from London were down in 2010 by nearly 14,000. Gatwick saw a slight decrease in passenger numbers and there was the continuing loss on the London Heathrow route. There was also a decrease of 3,800 on the routes from the Midlands.

Figure 24 illustrates the impact of operators in 2010 vs. 2009 by region.

**Figure 23 Changes in UK air arrivals by region 2010 vs. 2009**



For more detailed arrivals data please refer to Appendices 15 to 18.

## 9. Guide to Data Sources and Notes

### Figures

Where it is felt to be appropriate, figures within the text and tables have been rounded. This may mean that some totals and percentages may not totally agree or, in the case of percentages, add up to 100%.

### Seasons

Where seasons are referred to, the following is applied:

Spring = April, May and June

Summer = July and August

Autumn = September and October

Winter = November, December, January, February and March

### Passenger arrivals

Detailed monthly passenger arrivals figures by route are provided by Jersey Airport and by Jersey Harbours. Passenger arrivals figures include returning Jersey residents, returning visitors (who may have taken a day trip or other trip away from Jersey during their stay and are therefore counted twice) and arriving visitors. The tables, graphs and figures have been produced by Jersey Tourism.

### Visitor volume, value and profiles

The sources used in estimating visitor volume are declared beneath the relevant tables in the appendices.

### Visitor Registration Scheme

The basis of staying leisure and business visitors is the Visitor Registration database. All guests who stay in registered accommodation in Jersey are required by law to complete details of their stay on a standard Visitor Registration Card. These cards are returned to Jersey Tourism at regular intervals and the details are data inputted. Despite the legal requirement to declare all guests, the results are still affected by the non-return or late return of some cards and the partial or non-completion of cards by some visitors. Over the years the true extent of visitors not declared on visitor registration cards has been determined by the 1997/98, 2003, 2005, 2007 and 2009 Jersey Travel Surveys, and multipliers have been applied accordingly to the database results to compensate for this in the staying visitor estimates.

### The Jersey Travel Surveys

Realising the limitations of the Visitor Registration Scheme in determining total visitor volume, as well as changing trends in the profile of visitors, Jersey Tourism commissioned a year-long exit survey in 2009 to measure visitor volume in order to update data gathered from the most recent previous survey undertaken in 2007. Similar in methodology to the UK International Passenger Survey and many other exit surveys carried out internationally, throughout 2009, over 50,000 departing passengers, representing 108,000 (9.8%) of total departing passengers, were asked whether they were a resident or visitor to Jersey, whether they were departing at the end of their stay, their purpose of visit and country of residence. The results were calibrated against total passenger numbers on individual routes and consolidated to determine total visitor volumes.

In 2007, a smaller sample of 18,620 departing visitors, with adequate sub-sample sizes to measure individual markets, were asked detailed questions about their expenditure whilst in Jersey. Results from this survey determined the on-island expenditure figures for 2007. Changes in visitor profile, such as length of stay, and Jersey's RPI figures have been used to update some elements of expenditure estimates as accurately as possible.

Prior to these exit surveys, Jersey Tourism had no accurate way of measuring total visitor volume and concentrated rather on the staying leisure market, estimates of which came from returned Visitor Registration Cards. Visitor expenditure estimates were previously derived from a 4-yearly postal survey of staying leisure visitors, with other markets being excluded. As the methodology for the measurement of visitor volume and visitor expenditure has completely changed, Jersey does not, unfortunately, have historical data that can be readily compared prior to 1997.

### **Staying Leisure Visitor Surveys 2006 and 2008**

Several references are made to the Staying Leisure Visitor Surveys within the report. A sample of 6,000 visiting parties who stayed in registered accommodation for leisure purposes throughout 2006 was sent an eight-page, self-completion questionnaire. An excellent response rate of 55% (returned questionnaires) was achieved, with adequate sub-samples for Jersey's main generating markets. The 2008 Survey only covered visitors from the UK.

The data provides a rich source of additional information on Jersey's main source leisure markets and results for specific questions within the survey are available upon request. A summary report of the main findings is available on Jersey Tourism's website [www.jersey.com/marketinginfo](http://www.jersey.com/marketinginfo).

### **Employment figures**

As mentioned within the report, employment figures are provided by the States of Jersey Statistics Unit. The figures come from the twice yearly Manpower Survey. The tables, graphs and interpretation from the figures have been produced by Jersey Tourism.

### **Registered bed stock**

All tourism establishments that take five or more guests for reward are required to register with Jersey Tourism. Figures for establishments, rooms and bed spaces are therefore provided by the Jersey Tourism Inspectorate. Due to the continuously changing numbers of registered properties and rooms, the figures within this report may not be equivalent to previously released figures as they depend upon the exact date that they were recorded.

2006 heralded a change in the system used for grading registered establishments. Although the Economic Development Department remains responsible for the Registration standards, grading is no longer mandatory. Establishments can choose to be graded or remain as registered only. Jersey Tourism only publishes the grades achieved under the harmonised schemes operated by either the AA or VisitBritain (Jersey Quality Assured).

### **Accommodation occupancy, bed/room nights available and bed/room nights sold**

Bed and room nights available take into account registered bed spaces and rooms, and opening and closing dates for each establishment. Bed and room nights sold are a measure of the number of persons multiplied by their length of stay. By comparing bed and room nights sold against bed and room nights available it is possible to determine bed and room space occupancy levels.

### **Other Sources used within the 2010 Annual Report.**

Jersey Conference Bureau  
[www.jerseyconferences.co.uk](http://www.jerseyconferences.co.uk)

Jersey Met Office  
[www.jerseymet.gov.je](http://www.jerseymet.gov.je)

Jersey Harbours  
[www.jersey-harbours.com](http://www.jersey-harbours.com)

Statistics Unit  
[www.gov.je/ChiefMinister/Statistics](http://www.gov.je/ChiefMinister/Statistics)

**For other statistics and research please visit**  
[www.jersey.com/marketinginfo](http://www.jersey.com/marketinginfo)

## Appendix 1

## VISITOR VOLUMES 1997 - 2010

STAYING HOLIDAY/LEISURE VISITORS																
	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	Change 10/09	Average '06-'10
UK	462,000	432,430	417,810	399,200	384,660	349,100	302,420	306,760	300,900	289,200	295,040	282,810	255,990	249,660	-2.5%	274,980
IRELAND	15,470	12,870	13,230	11,920	9,500	7,330	6,950	5,140	5,600	4,990	4,160	5,760	5,570	4,380	-21.4%	4,970
OTHER CI	13,350	12,600	13,210	12,850	13,640	14,500	15,380	15,180	16,770	15,280	15,320	16,470	16,590	16,440	-0.9%	16,020
FRANCE	39,060	33,310	32,260	31,770	28,810	29,920	29,300	29,960	31,370	31,450	33,400	32,070	34,260	36,910	7.7%	33,620
GERMANY	16,630	15,730	17,110	15,700	10,820	10,090	8,960	10,240	9,460	10,680	9,640	8,850	9,260	10,800	16.6%	9,850
NORWAY	9,700	5,290	4,040	3,820	2,170	1,330	810	790	650	470	460	810	420	590	40.5%	550
SWEDEN	6,100	5,080	2,520	1,840	1,430	1,250	560	960	900	1,210	1,140	930	570	460	-19.3%	860
NETHERLANDS	5,520	5,160	5,510	5,250	3,730	3,630	3,520	3,660	3,450	3,420	3,940	2,960	3,150	3,570	13.3%	3,410
BELGIUM	4,180	3,810	4,370	3,100	2,580	2,310	2,280	2,760	2,730	2,100	2,070	1,730	1,610	1,530	-5.0%	1,810
SWITZERLAND	3,200	3,580	3,280	2,920	2,470	2,300	1,830	2,020	2,030	1,820	1,900	1,810	2,000	1,910	-4.5%	1,890
FINLAND	2,530	2,600	390	530	260	190	90	130	100	440	180	110	150	220	46.7%	220
DENMARK	1,710	1,420	1,310	1,070	700	620	380	410	440	490	430	420	410	460	12.2%	440
AUSTRIA	1,370	1,560	1,790	1,030	910	720	560	550	380	530	950	630	410	340	-34.9%	620
SPAIN	450	320	260	320	310	410	340	290	380	370	390	360	420	360	-14.3%	380
PORTUGAL	270	290	270	350	270	340	300	170	260	90	230	250	380	220	-42.1%	230
ITALY	420	390	370	330	240	370	290	240	230	210	330	240	460	340	-26.1%	300
CANADA	1,740	1,590	1,220	1,330	970	780	690	720	610	680	730	710	480	670	39.6%	650
USA	1,900	1,810	1,860	1,680	1,480	1,280	1,160	1,120	1,170	1,090	1,130	880	1,110	1,350	21.6%	1,110
AUSTRALIA <sup>1</sup>			790	1,250	1,060	890	720	970	890	880	1,020	1,030	910	1,110	22.0%	990
OTHER	4,890	3,800	2,710	2,880	2,640	2,310	2,470	2,610	2,780	3,400	3,500	3,760	4,060	3,760	-7.4%	3,500
TOTAL STAYING LEISURE <sup>2</sup>																
	590,490	543,640	524,310	499,140	468,650	429,670	378,850	384,540	380,930	368,160	375,860	362,280	338,430	335,150	-1.0%	355,980
VISITING FRIENDS/RELATIVES <sup>3</sup>																
LANGUAGE STUDENTS <sup>4</sup>	62,440	68,320	74,860	78,540	81,780	86,470	89,380	95,220	100,550	90,110	81,710	95,470	101,010	98,610	-2.4%	93,380
BUSINESS VISITORS <sup>5</sup>	4,370	4,260	3,020	2,680	2,560	2,230	2,300	2,070	1,930	2,500	2,230	2,850	2,680	2,950	10.1%	2,640
CONFERENCE DELEGATES <sup>6</sup>	89,430	96,940	105,720	107,940	100,500	104,550	93,140	83,190	76,390	87,290	104,010	105,430	88,910	95,850	7.8%	96,300
LEISURE DAYTRIPPERS <sup>8</sup>	15,130	16,330	13,220	16,030	13,020	13,890	4,250	5,480	5,920	8,780	9,690	9,190	9,240	9,220	-0.2%	9,220
OTHER <sup>9</sup>	27,670	26,650	27,480	25,190	25,850	23,600	25,830	24,230	24,350	24,030	21,070	19,920	21,420	23,230	8.5%	21,930
TOTAL VISITORS	160,000	165,290	153,690	135,330	141,110	135,500	117,370	110,980	115,690	100,880	94,050	96,730	98,360	99,870	1.5%	97,980
OTHER <sup>9</sup>	35,380	36,330	35,330	34,870	36,870	37,510	37,480	41,360	46,510	46,790	50,660	34,520	20,740	20,360	-1.8%	34,610
TOTAL VISITORS	984,910	957,760	937,630	899,720	870,340	833,420	748,600	747,070	752,270	728,540	739,280	726,390	680,790	685,240	0.7%	712,050

<sup>1</sup> Prior to 1999, Australia was classified within "Other".<sup>2</sup> Staying leisure visitors are based upon returns of visitor registration cards and the 1997, 2003/4, 2005, 2007 and 2009 Travel Surveys and refer to those staying in paid accommodation.<sup>3</sup> VFR estimates refer to those staying with friends and relatives, and not those who stay in paid accommodation. The estimates are based upon the 1997, 2003/4, 2005, 2007 and 2009 Travel Surveys.<sup>4</sup> Language student numbers are based upon declarations from language schools.<sup>5</sup> Business visitor estimates are based upon returns of visitor registration cards and the 1997, 2003/4, 2005, 2007 and 2009 Travel Surveys.<sup>6</sup> Conference figures are supplied by the Jersey Conference Bureau.<sup>7</sup> Visiting yacht figures are supplied by the Jersey Harbours.<sup>8</sup> Leisure day trips are estimated from the results of the 1997, 2003/4, 2005, 2007 and 2009 Travel Surveys.<sup>9</sup> "Other" may refer to business or leisure visits (e.g. specific events, deliveries, visiting bands, weddings, funerals, educational trips etc.). The 2009 Travel Survey had a tighter definition of "Other" than previous surveys, with many respondents being reclassified as leisure or business visitors.

## Appendix 2

### BREAKDOWN OF ON-ISLAND VISITOR EXPENDITURE ESTIMATES BY SOURCE MARKET FOR 2009 AND 2010

	2009		2010		2010 vs. 2009	
	Spend per Visitor	Value of Market £000's	Spend per Visitor	Value of Market £000's	% Change Spend per Visitor	% Change Value of Market
<b><u>Staying Holiday/Leisure Visitors</u></b>						
UK	£472	£120,738	£476	£118,834	1%	-2%
Ireland	£551	£3,071	£568	£2,485	3%	-19%
Other C.I.	£282	£4,686	£280	£4,596	-1%	-2%
France	£232	£7,964	£245	£9,025	5%	13%
Germany	£516	£4,780	£529	£5,713	3%	20%
Benelux	£456	£2,174	£455	£2,320	0%	7%
Other	£476	£5,712	£490	£5,806	3%	2%
<b><u>Staying Leisure Total</u><sup>1</sup></b>	<b>£441</b>	<b>£149,125</b>	<b>£444</b>	<b>£148,778</b>	<b>1%</b>	<b>0%</b>
<b><u>Visiting friends/relatives</u><sup>1</sup></b>	<b>£273</b>	<b>£27,588</b>	<b>£274</b>	<b>£27,033</b>	<b>0%</b>	<b>-2%</b>
<b><u>Language students</u><sup>2</sup></b>	<b>£846</b>	<b>£2,269</b>	<b>£908</b>	<b>£2,678</b>	<b>7%</b>	<b>18%</b>
Daytrippers - French	£50	£2,625	£50	£2,714	1%	3%
Daytrippers - UK	£42	£490	£43	£472	1%	-4%
Daytrippers - Other C.I.	£98	£1,579	£98	£1,581	0%	0%
Daytrippers - Other	£39	£680	£39	£726	2%	7%
<b><u>Daytrippers - Total</u><sup>1</sup></b>	<b>£55</b>	<b>£5,373</b>	<b>£55</b>	<b>£5,493</b>	<b>1%</b>	<b>2%</b>
<b><u>Visiting yachtsmen</u><sup>3</sup></b>	<b>£93</b>	<b>£1,999</b>	<b>£90</b>	<b>£2,091</b>	<b>-4%</b>	<b>5%</b>
Business - Day visitors	£62	£1,948	£64	£1,927	2%	-1%
Business - Staying visitors	£370	£21,327	£391	£25,664	6%	20%
<b><u>Business visitors - Total</u><sup>1</sup></b>	<b>£262</b>	<b>£23,275</b>	<b>£288</b>	<b>£27,591</b>	<b>10%</b>	<b>19%</b>
Conference - Association	£558	£3,098	£515	£1,966	-8%	-37%
Conference - Corporate	£677	£2,498	£675	£3,647	0%	46%
<b><u>Conference delegates - Total</u><sup>4</sup></b>	<b>£606</b>	<b>£5,596</b>	<b>£609</b>	<b>£5,613</b>	<b>1%</b>	<b>0%</b>
Other - Day visitors	£77	£383	£77	£397	0%	4%
Other - Staying visitors	£662	£10,450	£676	£10,292	2%	-2%
<b><u>Other visitors - Total</u><sup>1</sup></b>	<b>£522</b>	<b>£10,833</b>	<b>£525</b>	<b>£10,689</b>	<b>1%</b>	<b>-1%</b>
<b>Total Visitors</b>	<b>£332</b>	<b>£226,059</b>	<b>£336</b>	<b>£229,965</b>	<b>1%</b>	<b>2%</b>

<sup>1</sup> Expenditure is calculated by using results from the 2007 Jersey Travel Survey and applying RPI increases/decreases.

<sup>2</sup> Expenditure is calculated from a study carried out amongst language students to the UK and applying RPI increases/decreases.

<sup>3</sup> Expenditure is calculated by using results from the 2007 Visiting Yachts Survey and applying RPI increases/decreases.

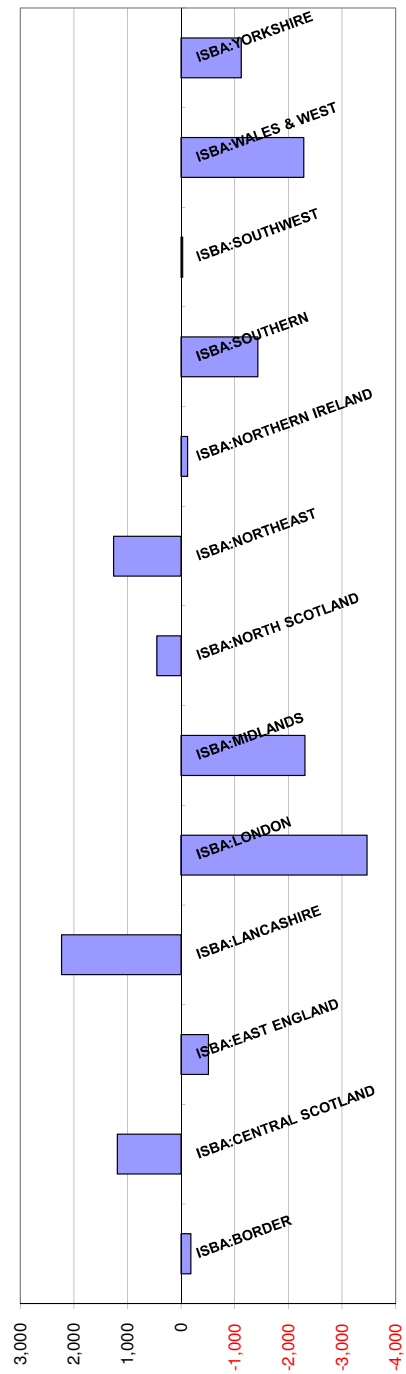
<sup>4</sup> Expenditure is calculated by using results from the 2007 Jersey Travel Survey and research into conference delegate rates and applying RPI increases/decreases.

### Appendix 3 UK Staying Leisure Visitors by ISBA Region 2006 - 2010

REGION	UK Households	2006	Market Share	2007	Market Share	2008	Market Share	2009	Market Share	2010	Market Share	% Change 10/09	Vol. Change 10/09	2010 Index
ISBA-BORDER	1.2%	2,400	1%	2,330	1%	2,390	1%	2,610	1%	2,430	1%	-6.9%	-180	0.81
ISBA-CENTRAL SCOTLAND	6.3%	10,353	4%	10,980	4%	10,020	4%	8,890	3%	10,080	4%	13.4%	1,190	0.64
ISBA-EAST ENGLAND	6.7%	21,459	7%	22,920	8%	20,502	8%	17,690	7%	17,180	7%	-2.9%	-510	1.03
ISBA-LANCASHIRE	11.6%	27,676	10%	25,080	9%	29,520	10%	26,290	10%	28,520	11%	8.5%	2,230	0.98
ISBA-LONDON	19.4%	48,094	17%	53,200	18%	51,420	18%	51,540	20%	48,070	19%	-6.7%	-3,470	0.99
ISBA-MIDLANDS	15.4%	54,370	19%	55,850	19%	45,873	18%	41,790	16%	39,480	16%	-5.5%	-2,310	1.03
ISBA-NORTH SCOTLAND	2.1%	3,760	1%	3,920	1%	4,580	2%	4,640	2%	5,090	2%	9.7%	450	0.97
ISBA-NORTHEAST	5.1%	11,944	4%	7,820	3%	8,960	3%	6,890	3%	8,150	3%	18.3%	1,260	0.64
ISBA-NORTHERN IRELAND	2.4%	4,512	2%	4,340	1%	3,123	1%	5,080	2%	4,960	2%	-2.4%	-120	0.83
ISBA-SOUTHERN	9.2%	35,890	12%	35,820	12%	34,500	12%	33,330	13%	31,900	13%	-4.3%	-1,430	1.39
ISBA-SOUTHWEST	3.0%	12,551	4%	12,300	4%	11,620	4%	10,020	4%	9,990	4%	-0.3%	-30	1.33
ISBA-WALES & WEST	7.7%	24,756	9%	28,970	10%	24,630	9%	23,210	9%	20,920	8%	-9.9%	-2,290	1.09
ISBA-YORKSHIRE	9.9%	31,436	11%	31,510	11%	28,370	10%	24,000	9%	22,880	9%	-4.7%	-1,120	0.93
<b>TOTAL</b>		<b>289,200</b>		<b>295,040</b>		<b>282,610</b>		<b>255,990</b>		<b>249,660</b>		<b>-2.5%</b>	<b>-6,330</b>	

ISBA regions approximate to the non-overlap UK ITV areas before consolidation and are determined by postcodes.

Visitor volume changes by ISBA region 2010 vs.2009



## Appendix 4

French Staying Leisure Visitors by Region 2006-2010

	<u>2006</u>	<u>% market share</u>	<u>2007</u>	<u>% market share</u>	<u>2008</u>	<u>% market share</u>	<u>2009</u>	<u>% market share</u>	<u>2010</u>	<u>% market share</u>	Change 10/09	Average 2006-2010
BRITTANY	9,910	32%	10,710	32%	11,280	35%	12,330	35%	13,800	37%	12%	11,610
GREATER PARIS	6,260	20%	6,350	19%	6,050	19%	6,850	19%	6,140	17%	-10%	6,330
NORMANDY	5,220	17%	5,560	17%	4,780	15%	4,790	15%	5,690	15%	19%	5,210
LOIRE VALLEY	5,630	18%	5,810	17%	5,480	17%	5,480	17%	6,090	17%	11%	5,700
SOUTH EAST	880	3%	940	3%	830	3%	890	3%	1,200	3%	35%	950
SOUTH WEST	820	3%	910	3%	800	3%	860	3%	920	2%	7%	860
MEDITERRANEAN	570	2%	650	2%	640	2%	690	2%	610	2%	-12%	630
POITOU-CHARENTES	570	2%	660	2%	550	2%	580	2%	590	2%	2%	590
NORTH EAST	440	1%	470	1%	450	1%	480	1%	520	1%	8%	470
NORTH	440	1%	490	1%	380	1%	410	1%	560	2%	36%	460
PICARDY	380	1%	380	1%	480	2%	520	2%	320	1%	-38%	420
BURGUNDY	190	1%	240	1%	190	1%	210	1%	210	1%	0%	210
CHAMPAGNE	160	1%	230	1%	160	1%	170	1%	260	1%	53%	200
TOTAL	31,450		33,400		32,070		34,260		36,910		8%	33,620

French regions represent grouped départements, which are determined by the first two digits of French postcodes.

## Appendix 5

**MOSAIC profile of UK Staying Leisure Visitors 2007 - 2010**

Type	Group	% Households	Type Description	% Households	2007	2008	2009	2010	Index 2010
1	Symbols of Success	9.6%	Global Connections	0.7%	0.7%	0.8%	0.8%	0.8%	1.07
2			Cultural Leadership	0.9%	1.3%	1.4%	1.4%	1.4%	1.55
3			Corporate Chieftains	1.1%	2.7%	2.7%	3.1%	3.1%	2.73
4			Golden Empty Nesters	1.3%	3.0%	2.9%	3.0%	3.0%	2.28
5			Provincial Privilege	1.7%	3.2%	3.2%	3.3%	3.4%	2.02
6			High Technologists	1.8%	3.8%	3.8%	4.2%	4.0%	2.22
7			Semi-rural Seclusion	2.0%	3.8%	3.9%	4.1%	4.1%	2.01
8	Happy Families	10.8%	Just Moving In	0.9%	0.4%	0.4%	0.5%	0.5%	0.60
9			Fledgling Nurseries	1.2%	1.5%	1.5%	1.5%	1.5%	1.29
10			Upscale New Owners	1.4%	2.5%	2.4%	2.5%	2.4%	1.81
11			Families Making Good	2.3%	2.9%	2.9%	2.8%	2.8%	1.21
12			Middle Rung Families	2.9%	3.5%	3.5%	3.4%	3.5%	1.22
13			Burdened Optimists	2.0%	1.4%	1.5%	1.4%	1.3%	0.66
14			In Military Quarters	0.2%	0.1%	0.1%	0.1%	0.1%	0.76
15	Suburban Comfort	15.1%	Close to Retirement	2.8%	5.3%	5.2%	5.3%	5.4%	1.91
16			Conservative Values	2.8%	4.6%	4.5%	4.3%	4.2%	1.48
17			Small Time Business	2.9%	4.4%	4.4%	4.3%	4.3%	1.48
18			Sprawling Subtopia	3.1%	4.0%	4.0%	3.8%	3.9%	1.27
19			Original Suburbs	2.4%	3.4%	3.3%	3.5%	3.5%	1.45
20			Asian Enterprise	1.0%	0.5%	0.5%	0.4%	0.4%	0.36
21	Ties of Community	16.0%	Respectable Rows	2.7%	2.5%	2.6%	2.5%	2.5%	0.96
22			Affluent Blue Collar	3.1%	4.0%	4.0%	3.6%	3.7%	1.20
23			Industrial grit	3.8%	3.1%	3.0%	2.7%	2.7%	0.70
24			Coronation Street	2.8%	1.1%	1.1%	1.0%	1.0%	0.34
25			Town Centre Refuge	1.1%	0.7%	0.7%	0.6%	0.6%	0.56
26			South Asian Industry	0.9%	0.1%	0.1%	0.1%	0.1%	0.13
27			Settled Minorities	1.6%	0.6%	0.6%	0.7%	0.6%	0.40
28	Urban Intelligence	7.2%	Counter Cultural Mix	1.4%	0.7%	0.7%	0.7%	0.7%	0.53
29			City Adventurers	1.3%	1.0%	1.1%	1.2%	1.1%	0.88
30			New Urban Colonists	1.4%	1.3%	1.4%	1.5%	1.4%	1.03
31			Caring Professionals	1.1%	0.9%	0.9%	0.9%	0.9%	0.80
32			Dinky Developments	1.1%	0.7%	0.7%	0.7%	0.7%	0.66
33			Town Gown Transition	0.8%	0.4%	0.4%	0.4%	0.4%	0.49
34			University Challenge	0.3%	0.1%	0.2%	0.1%	0.2%	0.66
35	Welfare Borderline	6.4%	Bedsit Beneficiaries	0.7%	0.2%	0.3%	0.3%	0.2%	0.34
36			Metro Multiculture	1.7%	0.4%	0.5%	0.4%	0.4%	0.26
37			Upper Floor Families	1.7%	0.5%	0.5%	0.4%	0.4%	0.24
38			Tower Block Living	0.5%	0.1%	0.1%	0.1%	0.1%	0.14
39			Dignified Dependency	1.3%	0.4%	0.4%	0.4%	0.4%	0.28
40			Sharing a Staircase	0.5%	0.1%	0.1%	0.1%	0.1%	0.19
41	Municipal Dependency	6.7%	Families on Benefits	1.2%	0.3%	0.3%	0.3%	0.3%	0.21
42			Low Horizons	26.4%	0.7%	0.8%	0.7%	0.7%	0.03
43			Ex-Industrial Legacy	2.9%	1.0%	1.0%	0.9%	0.9%	0.31
44	Blue Collar Enterprise	11.0%	Rustbelt Resilience	3.0%	1.5%	1.5%	1.4%	1.4%	0.46
45			Older Right to Buy	2.7%	1.8%	1.8%	1.7%	1.7%	0.65
46			White Van Culture	3.2%	2.5%	2.6%	2.3%	2.3%	0.73
47			New Town Materialism	2.2%	1.1%	1.0%	1.0%	1.0%	0.44
48	Twilight Subsistence	3.9%	Old People in Flats	0.8%	0.3%	0.3%	0.3%	0.3%	0.35
49			Low Income Elderly	1.6%	1.1%	1.1%	1.1%	1.1%	0.65
50			Cared for Pensioners	1.4%	0.6%	0.6%	0.5%	0.5%	0.35
51	Grey Perspectives	7.9%	Sepia Memories	0.8%	0.6%	0.6%	0.6%	0.6%	0.76
52			Childfree Serenity	1.3%	1.3%	1.4%	1.4%	1.5%	1.13
53			High Spending Elders	1.5%	2.7%	2.6%	2.7%	2.8%	1.84
54			Bungalow Retirement	1.3%	1.7%	1.6%	1.6%	1.6%	1.29
55			Small Town Seniors	2.7%	2.8%	2.8%	2.8%	2.9%	1.06
56			Tourist Attendants	0.3%	0.3%	0.3%	0.3%	0.3%	1.00
57	Rural Isolation	5.4%	Summer Playgrounds	0.3%	0.3%	0.3%	0.3%	0.3%	1.04
58			Greenbelt Guardians	1.7%	3.4%	3.5%	3.7%	3.7%	2.13
59			Parochial Villagers	1.6%	1.8%	1.9%	2.0%	1.9%	1.14
60			Pastoral Symphony	1.3%	1.7%	1.8%	1.8%	1.9%	1.42
61			Upland Hill Farmers	0.4%	0.4%	0.4%	0.4%	0.5%	1.18

MOSAIC is a geodemographic profiling system based upon UK postcodes.

This table shows the geo-demographic profile of visitors to Jersey between 2007 and 2010. The higher the index figure (this is the proportion of Jersey visitors compared to the UK population for each Mosaic Group), the more likely Jersey is to attract visitors from a particular Mosaic group.

## Appendix 6

## Length of Stay and Average Stay - Profile of Staying Leisure Visitors 2006 - 2010

COUNTRY	Stay															Average Stay				
	1 - 3 Nights					4 - 6 Nights					7 Nights					8+ Nights				
	2006	2007	2008	2009	2010	2006	2007	2008	2009	2010	2006	2007	2008	2009	2010	2006	2007	2008	2009	2010
UK	34%	36%	38%	39%	41%	26%	26%	25%	25%	26%	32%	30%	29%	28%	26%	8%	8%	7%	8%	7%
IRELAND	29%	30%	35%	34%	38%	28%	26%	31%	27%	27%	35%	37%	29%	31%	26%	7%	7%	6%	8%	9%
OTHER CI	94%	92%	93%	91%	93%	5%	7%	6%	7%	6%	1%	2%	1%	2%	1%	0%	0%	1%	0%	0%
FRANCE	89%	89%	88%	89%	89%	8%	8%	8%	8%	9%	2%	2%	2%	2%	2%	1%	1%	2%	1%	1%
GERMANY	21%	21%	24%	25%	26%	25%	27%	28%	26%	24%	36%	35%	32%	33%	37%	18%	17%	15%	15%	14%
NORWAY	31%	34%	45%	32%	47%	43%	44%	34%	35%	20%	12%	10%	7%	20%	21%	13%	12%	14%	13%	11%
SWEDEN	25%	25%	25%	25%	41%	66%	62%	64%	58%	32%	7%	9%	8%	8%	11%	3%	4%	4%	8%	16%
HOLLAND	31%	34%	36%	37%	41%	28%	28%	29%	23%	26%	30%	29%	26%	26%	24%	11%	10%	9%	15%	9%
BELGIUM	44%	57%	53%	52%	52%	36%	27%	31%	32%	32%	12%	10%	11%	10%	11%	8%	6%	5%	6%	5%
SWITZERLAND	36%	41%	44%	44%	40%	29%	23%	27%	32%	30%	25%	26%	18%	13%	20%	10%	9%	11%	11%	10%
FINLAND	80%	47%	38%	40%	44%	15%	27%	44%	44%	42%	2%	9%	8%	7%	8%	3%	16%	9%	9%	5%
DENMARK	22%	45%	55%	57%	61%	29%	16%	35%	16%	17%	40%	31%	6%	19%	10%	9%	8%	4%	7%	12%
AUSTRIA	53%	45%	50%	54%	42%	24%	32%	20%	21%	20%	12%	17%	20%	16%	29%	11%	7%	10%	9%	10%
SPAIN	49%	60%	45%	48%	61%	33%	25%	36%	24%	23%	9%	5%	10%	6%	8%	9%	10%	9%	21%	8%
PORTUGAL	47%	57%	47%	45%	65%	18%	13%	25%	30%	19%	22%	16%	14%	7%	9%	13%	14%	15%	18%	6%
ITALY	55%	48%	46%	39%	64%	28%	32%	40%	54%	21%	7%	9%	6%	3%	8%	10%	11%	8%	4%	7%
CANADA	41%	46%	45%	47%	50%	36%	27%	30%	29%	30%	13%	10%	10%	7%	9%	10%	17%	14%	17%	11%
USA	59%	60%	53%	68%	71%	26%	28%	35%	23%	21%	8%	7%	6%	4%	4%	7%	5%	7%	5%	4%
AUSTRALIA	56%	61%	56%	59%	56%	29%	26%	26%	26%	29%	9%	8%	7%	7%	9%	5%	5%	11%	9%	6%
OTHER	51%	56%	58%	65%	62%	26%	24%	23%	21%	21%	12%	10%	7%	7%	11%	1%	10%	12%	7%	6%
TOTAL	43%	45%	45%	47%	48%	23%	23%	23%	23%	23%	27%	26%	25%	23%	22%	7%	7%	7%	7%	6%

Percentages are derived from all those completing relevant sections of Visitor Registration Cards.

Percentages may not add up to 100% due to rounding.

## Appendix 7

## Travel &amp; Booking Patterns - Profile of Staying Leisure Visitors 2006 - 2010

COUNTRY	% Tour Operator												% First Time Visitors					When booked												Travel						
																		1 - 3 months						> 3 months					By Air							
	2006	2007	2008	2009	2010		2006	2007	2008	2009	2010		2006	2007	2008	2009	2010		2006	2007	2008	2009	2010		2006	2007	2008	2009	2010		2006	2007	2008	2009	2010	
UK	49%	51%	53%	52%	49%		41%	40%	43%	44%	47%		26%	31%	28%	29%	29%		38%	34%	37%	38%	37%		36%	34%	36%	32%	34%		82%	82%	82%	81%	81%	
	34%	40%	43%	41%	38%		44%	40%	46%	51%	50%		34%	35%	33%	33%	40%		44%	30%	39%	38%	34%		22%	35%	28%	29%	27%		97%	96%	97%	94%	94%	
	53%	56%	50%	49%	42%		7%	8%	8%	10%	13%		56%	67%	62%	59%	60%		36%	23%	30%	32%	29%		8%	9%	9%	9%	11%		50%	50%	50%	51%	52%	
FRANCE	66%	64%	61%	62%	61%		66%	66%	66%	60%	61%		61%	62%	61%	62%	60%		31%	28%	31%	31%	32%		8%	9%	8%	7%	8%		6%	5%	5%	5%	10%	8%
GERMANY	59%	63%	62%	62%	65%		85%	84%	83%	78%	79%		27%	27%	23%	25%	22%		34%	33%	34%	36%	33%		39%	40%	42%	39%	45%		56%	52%	53%	58%	65%	
NORWAY	36%	63%	38%	33%	35%		61%	66%	63%	63%	62%		33%	28%	26%	28%	31%		38%	40%	25%	37%	44%		30%	32%	49%	35%	25%		78%	49%	72%	75%	66%	
SWEDEN	64%	67%	66%	66%	49%		75%	76%	70%	66%	57%		62%	61%	52%	31%	36%		22%	18%	21%	41%	42%		16%	20%	27%	28%	22%		48%	53%	34%	49%	65%	
HOLLAND	57%	58%	56%	56%	55%		79%	83%	80%	74%	78%		35%	29%	32%	34%	35%		38%	40%	38%	35%	40%		27%	32%	30%	30%	25%		55%	51%	48%	51%	51%	
BELGIUM	58%	50%	49%	50%	58%		82%	78%	78%	72%	72%		42%	49%	43%	42%	45%		41%	29%	36%	34%	32%		18%	21%	21%	24%	22%		32%	24%	28%	34%	35%	
SWITZERLAND	48%	56%	55%	55%	59%		75%	72%	70%	63%	74%		45%	45%	41%	35%	39%		38%	34%	39%	43%	36%		17%	21%	21%	28%	25%		69%	73%	75%	79%	78%	
FINLAND	81%	39%	58%	56%	55%		87%	75%	71%	76%	74%		51%	38%	58%	39%	64%		45%	48%	28%	41%	22%		4%	14%	14%	20%	14%		93%	81%	73%	70%	56%	
DENMARK	38%	48%	42%	40%	32%		64%	68%	83%	62%	55%		44%	53%	42%	45%	37%		28%	25%	37%	32%	34%		28%	23%	21%	22%	29%		68%	75%	40%	57%	60%	
AUSTRIA	55%	60%	56%	55%	47%		84%	81%	83%	73%	75%		41%	26%	23%	32%	23%		38%	46%	36%	38%	31%		21%	28%	41%	30%	46%		62%	64%	57%	68%	67%	
SPAIN	29%	43%	35%	36%	39%		55%	47%	40%	51%	50%		55%	60%	49%	61%	59%		25%	25%	37%	21%	22%		20%	15%	14%	18%	19%		64%	73%	76%	77%	67%	
PORTUGAL	14%	25%	30%	28%	25%		36%	46%	59%	45%	57%		63%	66%	76%	50%	64%		38%	19%	21%	42%	25%		0%	15%	3%	9%	11%		82%	88%	75%	90%	76%	
ITALY	23%	43%	34%	33%	24%		69%	68%	76%	79%	67%		61%	46%	62%	61%	59%		31%	44%	27%	28%	28%		7%	9%	11%	11%	13%		61%	61%	57%	72%	49%	
CANADA	48%	55%	48%	48%	44%		70%	69%	70%	59%	64%		39%	41%	37%	35%	34%		37%	29%	35%	42%	39%		24%	30%	29%	22%	27%		81%	77%	70%	83%	70%	
USA	36%	42%	42%	41%	38%		30%	63%	73%	53%	68%		31%	46%	43%	45%	43%		40%	34%	35%	40%	40%		24%	21%	22%	15%	17%		78%	82%	82%	82%	78%	
AUSTRALIA	43%	39%	45%	41%	37%		64%	55%	65%	57%	60%		38%	54%	42%	44%	38%		36%	23%	30%	34%	30%		27%	23%	28%	23%	31%		80%	66%	71%	71%	67%	
OTHER	37%	38%	49%	47%	37%		62%	63%	64%	62%	58%		58%	62%	49%	46%	47%		31%	23%	34%	39%	34%		11%	15%	17%	15%	19%		75%	75%	77%	88%	82%	
TOTAL	51%	53%	53%	52%	49%		45%	44%	46%	45%	49%		31%	36%	33%	35%	36%		37%	33%	36%	37%	34%		32%	31%	32%	28%	30%		73%	73%	72%	72%	71%	

Percentages are derived from all those completing relevant sections of Visitor Registration Cards.

Percentages may not add up to 100% due to rounding.

## Appendix 8

## Age Groups and Average Age - Profile of Staying Leisure Visitors 2006 - 2010

COUNTRY	16 - 24										25-34					35 - 44					45 - 54					55 - 64					65 - 74					75+					Average Adult Age				
	2006	2007	2008	2009	2010	2006	2007	2008	2009	2010	2006	2007	2008	2009	2010	2006	2007	2008	2009	2010	2006	2007	2008	2009	2010	2006	2007	2008	2009	2010	2006	2007	2008	2009	2010	2006	2007	2008	2009	2010					
UK	2%	3%	3%	3%	3%	7%	7%	8%	8%	9%	15%	15%	14%	14%	13%	20%	21%	21%	21%	20%	24%	24%	24%	24%	24%	20%	19%	19%	19%	20%	11%	11%	11%	11%	12%	56	55	55	55	56					
	4%	6%	4%	5%	3%	16%	17%	19%	19%	18%	20%	18%	19%	20%	18%	22%	21%	23%	18%	20%	21%	20%	21%	23%	12%	14%	11%	12%	13%	4%	5%	4%	5%	5%	49	49	48	48	50						
	16%	17%	19%	18%	17%	23%	23%	22%	23%	22%	22%	21%	20%	20%	20%	18%	18%	18%	20%	19%	12%	13%	12%	11%	13%	6%	6%	6%	7%	2%	2%	2%	2%	2%	41	42	41	42	41						
	6%	6%	6%	7%	17%	15%	16%	17%	15%	22%	22%	21%	22%	19%	26%	26%	25%	24%	26%	18%	20%	20%	20%	20%	20%	8%	8%	8%	9%	3%	3%	3%	3%	3%	47	47	47	46	47						
FRANCE	1%	2%	2%	2%	2%	7%	6%	8%	7%	5%	19%	19%	18%	19%	15%	25%	25%	24%	24%	27%	23%	22%	21%	21%	24%	20%	21%	21%	21%	21%	6%	5%	6%	6%	7%	54	53	54	53	55					
	4%	5%	2%	3%	11%	6%	3%	5%	6%	9%	9%	15%	16%	15%	19%	27%	23%	26%	23%	27%	34%	32%	31%	32%	20%	13%	19%	17%	18%	10%	5%	3%	2%	3%	4%	54	54	50	54	51					
	2%	3%	2%	2%	6%	8%	9%	7%	5%	12%	9%	12%	10%	14%	18%	28%	19%	29%	31%	30%	35%	36%	35%	34%	30%	23%	12%	18%	12%	10%	8%	5%	5%	3%	1%	56	53	55	54	51					
	2%	2%	2%	2%	6%	9%	8%	9%	10%	6%	23%	19%	18%	15%	15%	30%	32%	27%	28%	29%	24%	24%	28%	26%	32%	9%	10%	12%	11%	11%	2%	6%	4%	5%	4%	50	51	51	51	53					
HOLLAND	3%	5%	4%	4%	6%	10%	9%	12%	10%	8%	17%	20%	18%	18%	19%	29%	29%	35%	33%	31%	21%	21%	19%	20%	26%	15%	12%	9%	10%	8%	5%	4%	5%	2%	52	49	49	48	49						
	2%	3%	6%	5%	5%	15%	14%	13%	12%	11%	18%	27%	21%	22%	18%	24%	21%	23%	23%	22%	23%	20%	21%	22%	20%	14%	11%	10%	11%	17%	4%	4%	6%	5%	7%	51	48	49	48	52					
	4%	3%	3%	3%	0%	13%	2%	9%	9%	18%	20%	33%	20%	25%	33%	33%	21%	45%	35%	37%	22%	28%	15%	17%	4%	6%	11%	8%	10%	8%	2%	2%	0%	1%	0%	46	49	46	45	45					
	3%	5%	4%	5%	4%	8%	2%	6%	5%	6%	9%	8%	12%	11%	15%	28%	39%	31%	29%	17%	30%	24%	29%	32%	29%	15%	14%	12%	12%	25%	8%	7%	6%	5%	54	56	52	55	45						
DENMARK	2%	3%	3%	3%	2%	10%	4%	7%	8%	8%	18%	19%	13%	15%	16%	27%	24%	25%	32%	25%	24%	26%	19%	18%	21%	14%	20%	26%	20%	24%	4%	7%	5%	4%	4%	51	53	55	52	54					
	4%	7%	11%	9%	3%	17%	17%	19%	17%	8%	19%	26%	16%	22%	17%	17%	15%	19%	16%	29%	22%	17%	15%	16%	20%	17%	12%	15%	15%	18%	3%	7%	5%	4%	4%	49	48	49	52	49					
	7%	10%	17%	15%	7%	35%	38%	33%	29%	29%	16%	21%	25%	21%	24%	14%	13%	13%	18%	27%	14%	11%	9%	10%	9%	0%	7%	1%	5%	4%	14%	0%	2%	2%	0%	41	39	38	44	41					
	4%	10%	10%	9%	9%	20%	18%	16%	18%	17%	32%	24%	38%	32%	17%	26%	17%	15%	20%	25%	13%	18%	14%	14%	20%	4%	12%	6%	8%	1%	1%	0%	1%	4%	44	46	42	42	47						
ITALY	3%	5%	4%	4%	4%	2%	3%	6%	5%	8%	9%	8%	10%	9%	6%	9%	13%	14%	19%	17%	27%	24%	27%	24%	24%	31%	22%	25%	24%	24%	18%	26%	14%	15%	16%	62	61	57	55	58					
	4%	0%	0%	3%	4%	11%	7%	12%	9%	10%	11%	12%	17%	14%	10%	24%	16%	18%	22%	17%	28%	32%	23%	22%	25%	17%	21%	21%	20%	22%	6%	11%	10%	10%	53	57	53	52	56						
	4%	4%	4%	4%	2%	9%	10%	12%	11%	9%	12%	9%	9%	10%	10%	19%	17%	18%	20%	15%	32%	38%	28%	28%	30%	20%	18%	22%	21%	28%	5%	5%	7%	6%	54	54	54	53	57						
	14%	13%	16%	15%	8%	20%	25%	23%	22%	21%	16%	16%	17%	17%	17%	16%	17%	15%	13%	19%	16%	14%	16%	17%	19%	13%	10%	11%	12%	14%	4%	4%	3%	4%	2%	45	44	43	45	46					
CANADA	4%	4%	4%	5%	4%	9%	9%	10%	9%	10%	16%	16%	15%	15%	14%	21%	21%	21%	22%	21%	23%	23%	23%	23%	23%	23%	18%	17%	17%	17%	10%	10%	9%	9%	10%	54	53	53	53	54					
	3%	5%	4%	4%	4%	2%	3%	6%	5%	8%	9%	8%	10%	9%	6%	9%	13%	14%	19%	17%	27%	24%	27%	24%	24%	31%	22%	25%	24%	24%	18%	26%	14%	15%	16%	62	61	57	55	58					
	4%	0%	0%	3%	4%	11%	7%	12%	9%	10%	11%	12%	17%	14%	10%	24%	16%	18%	22%	17%	28%	32%	23%	22%	25%	17%	21%	21%	20%	22%	6%	11%	10%	10%	53	57	53	52	56						
	4%	4%	4%	4%	2%	9%	10%	12%	11%	9%	12%	9%	9%	10%	10%	19%	17%	18%	20%	15%	32%	38%	28%	28%	30%	20%	18%	22%	21%	28%	5%	5%	7%	6%	54	54	54	53	57						
AUSTRALIA	4%	4%	4%	4%	2%	9%	10%	12%	11%	9%	12%	9%	9%	10%	10%	19%	17%	18%	20%	15%	32%	38%	28%	28%	30%	20%	18%	22%	21%	28%	5%	5%	7%	6%	54	54	54	53	57						
	14%	13%	16%	15%	8%	20%	25%	23%	22%	21%	16%	16%	17%	17%	17%	16%	17%	15%	13%	19%	16%	14%	16%	17%	19%	13%	10%	11%	12%	14%	4%	4%	3%	4%	2%	45	44	43	45	46					
	4%	10%	10%	9%	9%	20%	18%	16%	18%	17%	32%	24%	38%	32%	17%	26%	17%	15%	20%	25%	4%	12%	6%	8%	20%	4%	12%	6%	8%	1%	1%	0%	1%	4%	44	46	42	42	47						
	3%	5%	4%	4%	4%	2%	3%	6%	5%	8%	9%	8%	10%	9%	6%	9%	13%	14%	19%	17%	27%	24%	27%	24%	24%	31%	22%	25%	24%	24%	18%	26%	14%	15%	16%	62	61	57	55	58					
USA	4%	0%	0%	3%	4%	11%	7%	12%	9%	10%	11%	12%	17%	14%	10%	24%	16%	18%	22%	17%	28%	32%	23%	22%	25%	17%	21%	21%	20%	22%	6%	11%	10%	10%	53	57	53	52	56						
	4%	4%	4%	4%	2%	9%	10%	12%	11%	9%	12%	9%	9%	10%	10%	19%	17%	18%	20%	15%	32%	38%	28%	28%	30%	20%	18%	22%	21%	28%	5%	5%	7%	6%	54	54	54	53	57						
	4%	4%	4%	4%	2%	9%	10%	12%	11%	9%	12%	9%	9%	10%	10%	19%	17%	18%	20%	15%	32%	38%	28%	28%	30%	20%	18%	22%	21%	28%	5%	5%	7%	6%	54	54	54	53	57						
	14%	13%	16%	15%	8%	20%	25%	23%	22%	21%	16%	16%	17%	17%	17%	16%	17%	15%	13%	19%	16%	14%	16%	17%	19%	13%	10%	11%	12%	14%	4%	4%	3%	4%	2%	45	44	43	45	46					
OTHER	4%	4%	4%	4%	2%	9%	10%	12%	11%	9%	12%	9%	9%	10%	10%	19%	17%	18%	20%	15%	32%	38%	28%	28%	30%	20%	18%	22%	21%	28%	5%	5%	7%	6%	54	54	54	53	57						
	14%	13%	16%	15%	8%	20%	25%	23%	22%	21%	16%	16%	17%	17%	17%	16%	17%	15%	13%	19%	16%	14%	16%	17%	19%	13%	10%	11%	12%	14%	4%	4%	3%	4%	2%	45	44	43	45	46					
	4%	10%	10%	9%	9%	20%	18%	16%	18%	17%	32%	24%	38%	32%	17%	26%	17%	15%	20%	25%	4%	12%	6%	8%	20%	4%	12%	6%	8%	1%	1%	0%	1%	4%	44	46	42	42	47						
	3%	5%	4%	4%	4%	2%	3%	6%	5%	8%	9%	8%	10%	9%	6%	9%	13%	14%	19%	17%	27%	24%	27%	24%	24%	31%	22%	25%	24%	24%	18%	26%	14%	15%	16%	62	61	57	55	58					
CANADA	4%	0%	0%	3%	4%	11%	7%	12%	9%	10%	11%	12%	17%	14%	10%	24%	16%	18%	22%	17%	28%	32%	23%	22%	25%	17%	21%	21%	20%	22%	6%	11%	10%	10%	53	57	53	52	56						
	4%	4%	4%	4%	2%	9%	10%	12%	11%	9%	12%	9%	9%	10%	10%	19%	17%	18%	20%	15%	32%	38%	28%	28%	30%	20%	18%	22%	21%	28%	5%	5%	7%	6%	54	54	54	53	57						
	4%	4%	4%	4%	2%	9%	10%	12%	11%	9%	12%	9%	9%	10%	10%	19%	17%	18%	20%	15%	32%	38%	28%	28%	30%	20%	18%	22%	21%	28%	5%	5%	7%	6%	54	54	54	53	57						
	14%	13%	16%	15%	8%	20%	25%	23%	22%	21%	16%	16%	17%	17%	17%	16%	17%	15%	13%	19%	16%	14%	16%	17%	19%	13%	10%	11%	12%	14%	4%	4%	3%	4%	2%	45	44	43	45	46					
TOTAL	4%	4%	4%	5%	4%	9%	9%	10%	9%	10%	16%	16%	15%	15%	14%	21%	21%	21%	22%	21%	23%	23%	23%	23%	23%	23%	18%	17%	17%	17%	10%	10%	9%	9%	10%	54	53	53	53	54					

Percentages are derived from all those completing relevant sections of Visitor Registration Cards.

Percentages may not add up to 100% due to rounding.

## Appendix 9

Accommodation Establishments by Category 1992 – 2010

	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Hotels	167	168	166	163	152	146	136	133	119	109	99	93	87	86	82	81	76	71	70
Guest Houses	198	188	168	150	129	104	93	84	76	68	59	54	54	50	49	49	42	43	42
Holiday Villages	2	2	2	2	2	2	2	2	2	0	0	0	0	0	0	0	0	0	0
Self-Catering	20	20	21	23	27	29	31	35	35	35	29	26	21	25	25	24	22	24	24
Campsites	6	6	6	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4
Youth Hostel													1	1	1	1	1	0	1
<b>Total</b>	<b>393</b>	<b>384</b>	<b>363</b>	<b>342</b>	<b>314</b>	<b>285</b>	<b>266</b>	<b>258</b>	<b>236</b>	<b>216</b>	<b>191</b>	<b>177</b>	<b>167</b>	<b>166</b>	<b>161</b>	<b>159</b>	<b>145</b>	<b>142</b>	<b>141</b>

Accommodation Bed Spaces by Category 1992 – 2010

	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Hotels	16,852	16,875	16,609	16,531	16,200	15,628	15,302	14,828	13,444	12,660	11,532	11,082	10,465	10,138	9,804	9,840	9,746	9,045	9,199
Guest Houses	4,279	4,104	3,657	3,274	2,844	2,366	2,124	2,006	1,752	1,520	1,305	1,201	1,194	1,133	1,117	1,110	977	982	984
Holiday Villages	823	823	823	821	821	807	769	769	769	0	0	0	0	0	0	0	0	0	0
Self-Catering	316	332	365	433	595	687	703	828	897	958	860	814	684	767	772	736	674	760	922
Campsites	2,500	2,500	2,500	1,050	1,250	1,250	1,250	1,250	1,250	1,250	1,250	1,250	1,250	1,250	1,250	1,250	1,250	1,250	758
Youth Hostel													110	110	110	114	114	0	24
<b>Total</b>	<b>24,770</b>	<b>24,634</b>	<b>23,954</b>	<b>22,109</b>	<b>21,710</b>	<b>20,738</b>	<b>20,148</b>	<b>19,681</b>	<b>18,112</b>	<b>16,388</b>	<b>14,947</b>	<b>14,347</b>	<b>13,703</b>	<b>13,398</b>	<b>13,053</b>	<b>13,050</b>	<b>12,771</b>	<b>12,037</b>	<b>11,887</b>

N.B. Self-catering attached to hotels/guest houses appear within the hotel/guest house totals. Figures may not agree with previous figures due to being measured at a different time of the year.

## Appendix 10

**Bed space occupancy 2009 and 2010**

<u>2009</u>	<u>Jan</u>	<u>Feb</u>	<u>Mar</u>	<u>Apr</u>	<u>May</u>	<u>Jun</u>	<u>Jul</u>	<u>Aug</u>	<u>Sep</u>	<u>Oct</u>	<u>Nov</u>	<u>Dec</u>	<u>Year</u>
Bed nights available	166,855	176,845	218,005	297,621	356,809	357,620	377,891	376,588	357,511	276,784	198,416	184,527	3,345,472
Bed nights sold	26,577	41,216	72,820	120,392	213,014	234,263	289,951	303,419	240,367	121,540	51,920	50,625	1,766,104
<b>Total bed occupancy</b>	<b>15.93%</b>	<b>23.31%</b>	<b>33.40%</b>	<b>40.45%</b>	<b>59.70%</b>	<b>65.51%</b>	<b>76.73%</b>	<b>80.57%</b>	<b>67.23%</b>	<b>43.91%</b>	<b>26.17%</b>	<b>27.44%</b>	<b>52.79%</b>
Hotel bed nights available	139,449	147,189	173,801	241,800	277,113	271,830	280,303	279,000	267,721	227,148	170,123	158,214	2,633,691
Guest House bed nights available	9,600	10,796	18,175	22,189	27,678	27,030	29,016	29,016	28,080	23,766	11,410	10,611	247,367
Serviced bed nights available	149,049	157,985	191,976	263,989	304,791	298,860	309,319	308,016	295,801	250,914	181,533	168,825	2,881,058
Unserviced bed nights available	17,806	18,860	26,029	33,632	52,018	58,760	68,572	68,572	61,710	25,870	16,883	15,702	464,414
Bed nights sold in serviced accommodation	23,295	37,266	68,084	110,142	182,059	196,624	230,404	236,271	206,681	108,728	47,905	46,400	1,493,859
Total bed occupancy in serviced	15.63%	23.59%	35.46%	41.72%	59.73%	65.79%	74.49%	76.71%	69.87%	43.33%	26.39%	27.48%	51.85%
Hotel bed nights sold	21,962	35,726	63,645	104,161	167,850	181,409	213,723	219,288	192,407	102,083	45,715	44,398	1,392,367
Guest House bed nights sold	1,333	1,540	4,439	5,981	14,209	15,215	16,681	16,983	14,274	6,645	2,190	2,002	101,492
Hotel bed space occupancy	15.75%	24.27%	36.62%	43.08%	60.57%	66.74%	76.25%	78.60%	71.87%	44.94%	26.87%	28.06%	52.87%
Guest House bed space occupancy	13.89%	14.26%	24.42%	26.95%	51.34%	56.29%	57.49%	58.53%	50.83%	27.96%	19.19%	18.87%	41.03%
Other bed nights sold	3,282	3,950	4,736	10,250	30,955	37,639	59,547	67,148	33,686	12,812	4,015	4,225	272,245
Other bed space occupancy	18.43%	20.94%	18.20%	30.48%	59.51%	64.06%	86.84%	97.92%	54.59%	49.52%	23.78%	26.91%	58.62%
<b>2010</b>	<b>Jan</b>	<b>Feb</b>	<b>Mar</b>	<b>Apr</b>	<b>May</b>	<b>Jun</b>	<b>Jul</b>	<b>Aug</b>	<b>Sep</b>	<b>Oct</b>	<b>Nov</b>	<b>Dec</b>	<b>Year</b>
Bed nights available	159,210	155,479	217,665	305,065	350,770	354,630	360,251	360,840	344,049	276,198	207,451	182,986	3,274,594
Bed nights sold	25,376	41,191	71,979	119,467	200,724	236,879	298,766	306,586	235,301	119,363	50,254	49,538	1,755,424
<b>Total bed occupancy</b>	<b>15.94%</b>	<b>26.49%</b>	<b>33.07%</b>	<b>39.16%</b>	<b>57.22%</b>	<b>66.80%</b>	<b>82.93%</b>	<b>84.96%</b>	<b>68.39%</b>	<b>43.22%</b>	<b>24.22%</b>	<b>27.07%</b>	<b>53.61%</b>
Hotel bed nights available	137,001	132,984	174,131	246,007	277,418	277,350	280,612	280,612	271,078	226,414	172,319	146,879	2,622,805
Guest House bed nights available	9,555	9,900	17,509	24,620	27,027	27,360	27,745	28,334	27,420	22,296	11,981	9,689	243,436
Serviced bed nights available	146,556	142,884	191,640	270,627	304,445	304,710	308,357	308,946	298,498	248,710	184,300	156,568	2,866,241
Unserviced bed nights available	12,654	12,595	26,025	34,438	46,325	49,920	51,894	51,894	45,551	27,488	23,151	26,418	408,353
Bed nights sold in serviced accommodation	23,348	37,055	66,900	109,289	170,054	202,657	254,427	256,008	203,401	105,819	46,251	44,515	1,519,724
Total bed occupancy in serviced	15.93%	25.93%	34.91%	40.38%	55.86%	66.51%	82.51%	82.86%	68.14%	42.55%	25.10%	28.43%	53.02%
Hotel bed nights sold	22,058	35,345	63,395	103,275	158,419	188,629	235,475	236,885	190,137	98,852	43,877	42,841	1,419,188
Guest House bed nights sold	1,290	1,710	3,505	6,014	11,635	14,028	18,952	19,123	13,264	6,967	2,374	1,674	100,536
Hotel bed space occupancy	16.10%	26.58%	36.41%	41.98%	57.10%	68.01%	83.91%	84.42%	70.14%	43.66%	25.46%	29.17%	54.11%
Guest House bed space occupancy	13.50%	17.27%	20.02%	24.43%	43.05%	51.27%	68.31%	67.49%	48.37%	31.25%	19.81%	17.28%	41.30%
Other bed nights sold	2,028	4,136	5,079	10,178	30,670	34,222	44,339	50,578	31,900	13,544	4,003	5,023	235,700
Other bed space occupancy	16.03%	32.84%	19.52%	29.55%	66.21%	68.55%	85.44%	94.00%	70.03%	49.27%	17.29%	19.01%	57.72%

## Appendix 11

**Room space occupancy 2009 and 2010**

	2009												2010													
	Room nights available												Room nights available													
	Room nights sold												Room nights sold													
	Room night occupancy												Room night occupancy													
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Year
Hotel room nights available	67,499	69,697	84,752	117,035	134,862	132,360	136,493	135,842	130,346	110,454	79,999	70,414	1,269,753	66,149	63,956	84,980	119,577	139,114	135,060	136,524	131,844	110,122	84,577	71,877	1,280,304	
Guest House room nights available	4,745	5,317	9,030	11,073	13,716	13,380	14,326	14,322	13,860	11,743	6,250	4,510	122,272	4,750	4,886	8,591	11,106	13,702	13,470	13,315	13,609	13,400	11,001	5,735	4,835	118,400
Serviced room nights available	72,244	75,014	93,782	128,108	148,578	145,740	150,819	150,164	144,206	122,197	86,249	74,924	1,392,025	70,899	68,842	93,571	130,683	152,816	148,530	149,839	150,133	145,244	121,123	90,312	76,712	1,398,704
Other room nights available	5,739	5,846	7,636	8,540	10,788	9,300	8,773	8,773	8,400	7,688	6,678	6,204	94,365	3,575	5,724	7,714	7,782	8,043	7,920	8,463	8,160	7,232	5,220	6,295	84,591	
Room nights sold in serviced accom	17,605	25,664	41,639	57,340	93,281	100,556	117,841	122,445	103,855	61,274	30,613	27,134	799,247	17,610	25,545	41,266	56,869	88,623	103,186	131,647	135,747	103,027	60,136	31,097	26,603	821,356
Total room occupancy in serviced	24.37%	34.21%	44.40%	44.76%	62.78%	69.00%	78.13%	81.54%	72.02%	50.14%	35.49%	36.21%	57.42%	24.84%	37.11%	44.10%	43.52%	57.99%	69.47%	87.86%	90.42%	70.93%	49.65%	34.43%	34.68%	58.72%
Hotel room nights sold	16,503	24,377	38,890	53,265	85,914	92,819	108,146	113,389	96,464	56,785	29,174	25,930	741,657	66,149	63,956	84,980	119,577	139,114	135,060	136,524	131,844	110,122	84,577	71,877	1,280,304	
Guest House room nights sold	1,102	1,287	2,750	4,075	7,367	7,737	9,695	9,056	7,391	4,489	1,440	1,203	57,591	4,750	4,886	8,591	11,106	13,702	13,470	13,315	13,609	13,400	11,001	5,735	4,835	118,400
Hotel room occupancy	24.45%	34.98%	45.89%	45.51%	63.71%	70.13%	79.23%	83.47%	74.01%	51.41%	36.47%	36.83%	58.41%	24.45%	34.98%	45.89%	45.51%	63.71%	70.13%	79.23%	83.47%	74.01%	51.41%	36.47%	36.83%	58.41%
Guest House room occupancy	23.22%	24.20%	30.45%	36.80%	53.71%	57.83%	67.67%	63.23%	53.32%	38.23%	23.03%	26.68%	47.10%	23.22%	24.20%	30.45%	36.80%	53.71%	57.83%	67.67%	63.23%	53.32%	38.23%	23.03%	26.68%	47.10%
Other room nights sold	2,735	3,296	3,947	4,257	6,807	7,786	7,634	8,671	7,364	4,590	3,275	3,558	63,920	3,575	5,724	7,714	7,782	8,043	7,920	8,463	8,160	7,232	5,220	6,295	84,591	
Other room occupancy	47.66%	56.38%	51.69%	49.85%	63.10%	83.72%	87.02%	98.84%	87.67%	59.70%	49.04%	57.35%	67.74%	47.66%	56.38%	51.69%	49.85%	63.10%	83.72%	87.02%	98.84%	87.67%	59.70%	49.04%	57.35%	67.74%
Room nights available	74,474	74,566	101,285	138,465	160,859	156,450	158,302	158,596	153,404	128,355	95,532	83,007	1,483,295	74,474	74,566	101,285	138,465	160,859	156,450	158,302	158,596	153,404	128,355	95,532	83,007	1,483,295
Room nights sold	19,493	28,932	45,398	61,096	94,462	110,031	139,028	143,797	109,972	65,218	34,014	30,399	881,840	19,493	28,932	45,398	61,096	94,462	110,031	139,028	143,797	109,972	65,218	34,014	30,399	881,840
Room night occupancy	26%	39%	45%	44%	59%	70%	88%	91%	72%	51%	36%	37%	59%	26%	39%	45%	44%	59%	70%	88%	91%	72%	51%	36%	37%	59%
Hotel room nights available	66,149	63,956	84,980	119,577	139,114	135,060	136,524	131,844	131,844	110,122	84,577	71,877	1,280,304	66,149	63,956	84,980	119,577	139,114	135,060	136,524	131,844	110,122	84,577	71,877	1,280,304	
Guest House room nights available	4,750	4,886	8,591	11,106	13,702	13,470	13,315	13,609	13,400	11,001	5,735	4,835	118,400	4,750	4,886	8,591	11,106	13,702	13,470	13,315	13,609	13,400	11,001	5,735	4,835	118,400
Serviced room nights available	70,899	68,842	93,571	130,683	152,816	148,530	149,839	150,133	145,244	121,123	90,312	76,712	1,398,704	70,899	68,842	93,571	130,683	152,816	148,530	149,839	150,133	145,244	121,123	90,312	76,712	1,398,704
Other room nights available	3,575	5,724	7,714	7,782	8,043	7,920	8,463	8,463	8,160	7,232	5,220	6,295	84,591	3,575	5,724	7,714	7,782	8,043	7,920	8,463	8,160	7,232	5,220	6,295	84,591	
Room nights sold in serviced accom	17,610	25,545	41,266	56,869	88,623	103,186	131,647	135,747	103,027	60,136	31,097	26,603	821,356	17,610	25,545	41,266	56,869	88,623	103,186	131,647	135,747	103,027	60,136	31,097	26,603	821,356
Total room occupancy in serviced	24.84%	37.11%	44.10%	43.52%	57.99%	69.47%	87.86%	90.42%	70.93%	49.65%	34.43%	34.68%	58.72%	24.84%	37.11%	44.10%	43.52%	57.99%	69.47%	87.86%	90.42%	70.93%	49.65%	34.43%	34.68%	58.72%
Hotel room nights sold	16,539	24,023	38,379	52,785	82,138	96,001	120,669	125,316	96,068	55,380	29,545	25,557	762,400	16,539	24,023	38,379	52,785	82,138	96,001	120,669	125,316	96,068	55,380	29,545	25,557	762,400
Guest House room nights sold	1,104	1,522	2,887	4,084	6,485	7,185	10,978	10,431	6,959	4,756	1,552	1,046	58,989	1,104	1,522	2,887	4,084	6,485	7,185	10,978	10,431	6,959	4,756	1,552	1,046	58,989
Hotel room occupancy	25.00%	37.56%	45.16%	44.14%	59.04%	71.08%	88.39%	91.79%	72.86%	50.29%	34.93%	35.56%	59.55%	25.00%	37.56%	45.16%	44.14%	59.04%	71.08%	88.39%	91.79%	72.86%	50.29%	34.93%	35.56%	59.55%
Guest House room occupancy	23.24%	31.15%	33.60%	36.77%	47.33%	53.34%	82.45%	76.65%	51.93%	43.23%	27.06%	21.63%	49.82%	23.24%	31.15%	33.60%	36.77%	47.33%	53.34%	82.45%	76.65%	51.93%	43.23%	27.06%	21.63%	49.82%
Other room nights sold	1,850	3,837	4,132	4,227	5,839	6,845	7,381	8,050	6,945	5,082	2,917	3,796	60,451	1,850	3,837	4,132	4,227	5,839	6,845	7,381	8,050	6,945	5,082	2,917	3,796	60,451
Other room occupancy	51.75%	59.17%	53.56%	54.32%	72.60%	86.45%	87.21%	95.12%	85.11%	70.27%	55.88%	60.30%	71.46%	51.75%	59.17%	53.56%	54.32%	72.60%	86.45%	87.21%	95.12%	85.11%	70.27%	55.88%	60.30%	71.46%

## Appendix 12

### Jersey Link - Jersey Tourism Central Reservations 2006-2010

		BOOKINGS			No. of People	No. of Bednights	Value of Bookings	Value per Bednight
		VSC	Web	Total				
2006	January	51	354	405	908	3,317	£103,264	£31.13
	February	54	368	422	961	3,707	£114,409	£30.86
	March	119	468	587	1,321	4,641	£149,230	£32.15
	April	153	402	555	1,267	3,992	£135,845	£34.03
	May	181	441	622	1,364	4,743	£168,505	£35.53
	June	207	446	653	1,328	4,443	£164,434	£37.01
	July	286	507	793	1,712	5,964	£227,139	£38.09
	August	320	401	721	1,559	4,739	£173,301	£36.57
	September	231	250	481	928	2,724	£93,229	£34.23
	October	101	234	335	664	1,937	£55,955	£28.89
	November	75	167	242	442	1,257	£39,108	£31.11
	December	34	127	161	327	1,138	£35,412	£31.12
	<b>Total</b>	<b>1,812</b>	<b>4,165</b>	<b>5,977</b>	<b>12,781</b>	<b>42,602</b>	<b>£1,459,831</b>	<b>£34.27</b>
2007	January	51	369	420	967	3,392	£112,960	£33.30
	February	77	413	490	1,111	4,291	£144,525	£33.68
	March	81	515	596	1,332	4,718	£169,210	£35.86
	April	124	470	594	1,327	4,233	£150,781	£35.62
	May	165	610	775	1,648	5,428	£200,064	£36.86
	June	190	531	721	1,510	4,923	£194,736	£39.56
	July	190	520	710	1,561	5,104	£210,947	£41.33
	August	209	472	681	1,428	4,539	£177,337	£39.07
	September	194	305	499	956	2,806	£98,957	£35.27
	October	76	209	285	609	1,769	£49,130	£27.77
	November	44	121	165	333	957	£30,162	£31.52
	December	13	68	81	173	575	£16,845	£29.30
	<b>Total</b>	<b>1,414</b>	<b>4,603</b>	<b>6,017</b>	<b>12,955</b>	<b>42,735</b>	<b>£1,555,654</b>	<b>£36.40</b>
2008	January	39	291	330	702	2,822	£98,170	£34.79
	February	35	362	397	932	3,575	£122,891	£34.38
	March	48	326	374	810	2,888	£104,160	£36.07
	April	45	365	410	898	2,910	£110,190	£37.87
	May	91	445	536	1,096	3,649	£141,672	£38.82
	June	115	429	544	1,148	4,016	£162,969	£40.58
	July	156	420	576	1,238	4,004	£165,321	£41.29
	August	161	384	545	1,122	3,415	£134,739	£39.46
	September	104	205	309	589	1,584	£57,204	£36.11
	October	39	115	154	307	814	£25,491	£31.32
	November	20	86	106	204	589	£19,494	£33.10
	December	22	69	91	178	454	£14,531	£32.01
	<b>Total</b>	<b>875</b>	<b>3,497</b>	<b>4,372</b>	<b>9,224</b>	<b>30,720</b>	<b>£1,156,832</b>	<b>£37.66</b>
2009	January	22	230	252	573	2,615	£91,952	£35.16
	February	31	303	334	750	2,684	£97,397	£36.29
	March	32	336	368	836	2,930	£111,629	£38.10
	April	83	402	485	1,081	3,825	£151,689	£39.66
	May	94	471	565	1,210	4,158	£168,120	£40.43
	June	94	459	553	1,185	3,921	£168,376	£42.94
	July	100	502	602	1,269	4,251	£180,886	£42.55
	August	113	455	568	1,172	3,396	£144,377	£42.51
	September	110	262	372	733	2,068	£76,514	£37.00
	October	19	125	144	288	806	£25,820	£32.03
	November	16	88	104	193	589	£19,573	£33.23
	December	22	69	91	178	454	£14,531	£32.01
	<b>Total</b>	<b>872</b>	<b>3,477</b>	<b>4,349</b>	<b>9,180</b>	<b>30,441</b>	<b>£1,145,546</b>	<b>£37.63</b>
2010	January	9	204	213	484	1,954	£68,186	£34.90
	February	17	240	257	579	1,925	£67,602	£35.12
	March	28	414	442	999	3,338	£120,484	£36.09
	April	50	394	444	1,045	3,156	£115,553	£36.61
	May	65	346	411	894	2,787	£108,261	£38.84
	June	88	419	507	1,070	3,352	£135,824	£40.52
	July	115	582	697	1,492	4,601	£193,504	£42.06
	August	104	438	542	1,193	3,079	£127,405	£41.38
	September	71	257	328	641	1,682	£59,961	£35.65
	October	19	120	139	313	792	£29,314	£37.01
	November	12	102	114	223	657	£23,730	£36.12
	December	13	55	68	124	329	£12,813	£38.95
	<b>Total</b>	<b>589</b>	<b>3,543</b>	<b>4,132</b>	<b>8,992</b>	<b>27,273</b>	<b>£1,049,322</b>	<b>£38.47</b>
2010 vs. 2009		-32%	2%	-5%	-2%	-10%	-8%	2%

VSC = Visitor Services Centre, Jersey Tourism  
Web = Jersey Tourism Website - [www.jersey.com](http://www.jersey.com)

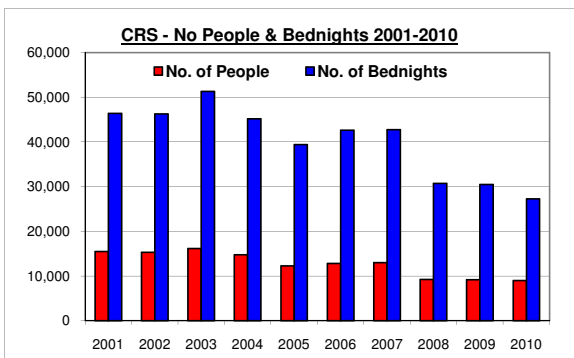
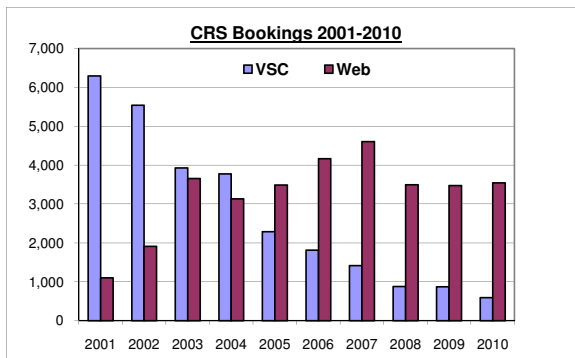
N.B. This data is collated based on monthly reports. Any booking modifications made after the release of these figures will have slightly altered the actual achieved data that is reported on in section 5.1 of the report. The yearly totals above include the adjustments.

To receive notification of updated or new information, please visit and register at [www.jersey.com/marketinginfo](http://www.jersey.com/marketinginfo)

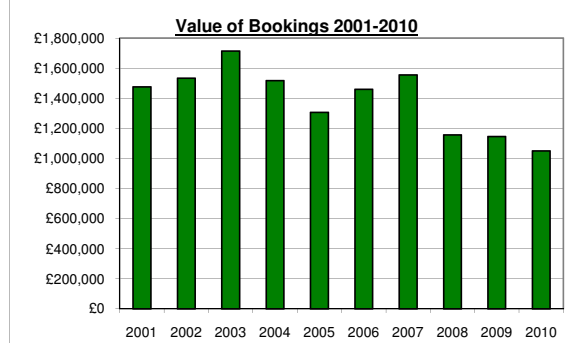
## Appendix 13

### JerseyLink - Jersey Tourism Central Reservations

	BOOKINGS			No. of People	No. of Bednights	Value of Bookings	Value per Bednight
	VSC	Web	Total				
2001	6,294	1,102	7,396	15,487	46,346	£1,476,600	£31.86
2002	5,538	1,912	7,450	15,308	46,228	£1,534,316	£33.19
2003	3,926	3,655	7,581	16,142	51,268	£1,714,211	£33.44
2004	3,777	3,130	6,907	14,748	45,153	£1,518,286	£33.63
2005	2,289	3,487	5,776	12,255	39,376	£1,306,853	£33.19
2006	1,812	4,165	5,977	12,781	42,602	£1,459,831	£34.27
2007	1,414	4,603	6,017	12,955	42,735	£1,555,654	£36.40
2008	875	3,497	4,372	9,224	30,720	£1,156,832	£37.66
2009	872	3,477	4,349	9,180	30,441	£1,145,546	£37.63
2010	589	3,543	4,132	8,992	27,273	£1,049,332	£38.47



VSC = Visitor Services Centre, Jersey Tourism  
Web = Jersey Tourism Website - [www.jersey.com](http://www.jersey.com)



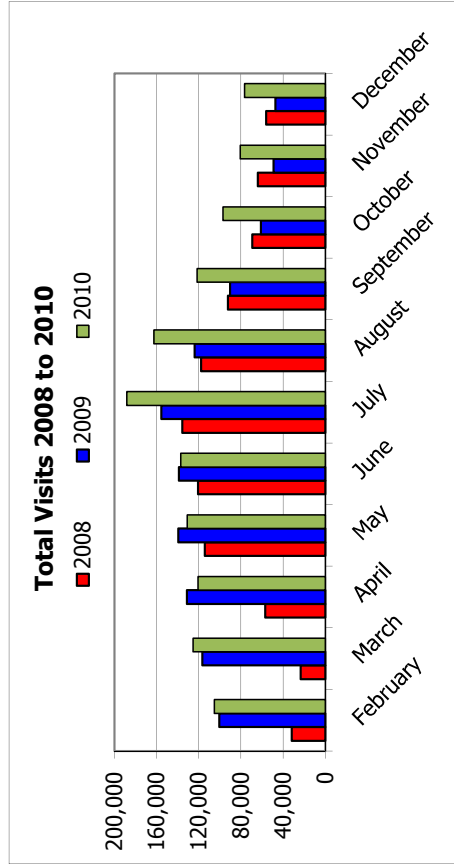
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## Appendix 14.1

### Visits to [www.jersey.com](http://www.jersey.com) 2008 - 2010

	<b>2008</b>	<b>2009</b>	<b>2010</b>
<b>January</b>	37,811	133,488	105,749
<b>February</b>	31,775	100,419	105,249
<b>March</b>	23,273	116,726	125,271
<b>April</b>	57,127	131,164	120,640
<b>May</b>	114,242	139,506	131,082
<b>June</b>	120,737	138,809	136,978
<b>July</b>	135,643	155,626	188,311
<b>August</b>	117,762	123,990	162,627
<b>September</b>	92,250	90,271	121,632
<b>October</b>	69,374	61,126	96,894
<b>November</b>	64,121	49,174	80,748
<b>December</b>	56,209	47,420	76,693
<b>Total</b>	<b>920,324</b>	<b>1,287,719</b>	<b>1,451,874</b>

source: Google Analytics



**Visits to [www.jersey.com](http://www.jersey.com) by country of residence**

**Source: Google Analytics**

## Appendix 15

## Total Passenger Arrivals 2002 - 2010

	TOTAL AIR ARRIVALS												TOTAL SEA ARRIVALS												TOTAL ARRIVALS											
	2002	2003	2004	2005	2006	2007	2008	2009	2010	2002	2003	2004	2005	2006	2007	2008	2009	2010	2002	2003	2004	2005	2006	2007	2008	2009	2010	2002	2003	2004	2005	2006	2007	2008	2009	2010
JAN	38,160	37,920	38,984	38,482	38,803	41,646	43,417	39,895	35,659	6,970	6,830	5,924	6,768	7,022	7,345	6,669	6,800	7,432	45,130	44,750	42,308	45,250	45,825	48,991	50,086	46,695	45,130	44,750	42,308	45,250	45,825	48,991	50,086	46,695	43,091	
FEB	40,840	40,300	41,894	40,486	41,593	44,208	49,938	42,565	42,776	8,200	8,070	9,857	11,609	8,731	8,655	10,057	9,002	9,559	48,040	48,170	51,541	52,095	50,324	52,863	59,995	51,567	48,040	48,170	51,541	52,095	50,324	52,863	59,995	51,567	51,935	
MAR	51,730	51,310	51,014	52,667	52,633	55,439	60,622	52,914	52,865	17,880	15,480	11,597	18,616	11,516	12,484	11,686	12,348	12,480	69,620	66,770	62,611	71,283	64,149	70,631	73,306	64,600	69,620	66,770	62,611	71,283	64,149	70,631	73,306	64,600	65,215	
APR	59,230	65,320	63,609	57,454	62,498	62,562	66,570	60,142	49,284	35,840	42,930	39,630	34,738	35,192	38,785	32,080	34,125	37,803	94,070	108,250	103,239	92,192	98,040	101,347	99,050	94,267	94,070	108,250	103,239	92,192	98,040	101,347	99,050	94,267	87,087	
MAY	71,890	74,680	74,147	74,492	69,421	73,530	81,287	71,399	69,284	52,380	53,020	47,556	48,451	40,182	45,807	47,905	45,058	44,835	124,270	127,680	122,003	122,943	109,603	119,417	129,192	114,119	124,270	127,680	122,003	122,943	109,603	119,417	129,192	114,119	114,119	
JUN	81,190	75,300	76,232	75,268	76,736	79,165	78,557	72,778	74,339	68,440	57,970	55,019	59,220	47,822	49,305	48,531	45,537	46,485	149,330	133,270	131,251	131,488	124,558	128,470	127,088	118,315	149,330	133,270	131,251	131,488	124,558	128,470	127,088	118,315	120,624	
JUL	79,800	82,060	85,930	84,766	84,076	83,093	86,307	80,546	82,698	70,440	62,690	63,616	63,364	54,421	54,952	53,424	54,045	56,241	150,240	144,710	148,746	148,150	138,497	138,045	139,731	134,591	150,240	144,710	148,746	148,150	138,497	138,045	139,731	134,591	138,939	
AUG	87,650	89,050	84,852	83,971	82,740	89,233	92,544	84,332	86,408	90,640	84,020	74,035	83,258	66,818	71,686	72,516	75,513	76,363	178,290	173,070	158,887	167,129	149,558	160,919	165,060	159,845	178,290	173,070	158,887	167,129	149,558	160,919	165,060	159,845	162,771	
SEP	73,030	71,940	76,518	76,000	76,835	79,833	77,639	72,714	74,003	58,510	52,770	50,047	53,952	48,779	47,327	38,751	42,786	43,253	131,540	124,710	126,565	129,852	125,614	127,260	116,390	115,500	131,540	124,710	126,565	129,852	125,614	127,260	116,390	115,500	117,286	
OCT	60,160	59,350	66,041	62,342	63,127	65,238	64,671	61,009	64,331	26,440	32,140	24,658	29,974	23,206	23,983	20,126	22,766	22,354	86,600	90,490	90,099	91,316	86,333	89,231	84,797	86,851	86,600	90,490	90,099	91,316	86,333	89,231	84,797	83,775	86,851	
NOV	48,590	46,650	46,618	49,812	52,628	56,720	50,581	49,047	47,220	11,580	10,010	11,870	11,315	11,017	11,928	8,705	7,676	8,629	60,190	56,660	58,488	61,127	63,645	68,648	59,286	56,723	60,190	56,660	58,488	61,127	63,645	68,648	59,286	56,723	55,849	
DEC	44,060	44,540	45,302	46,285	45,269	50,886	47,721	46,481	41,782	12,270	9,190	11,442	10,278	10,882	8,769	9,169	10,690	12,455	56,330	53,730	55,744	56,563	59,151	59,523	55,890	57,171	56,330	53,730	55,744	56,563	59,151	59,523	55,890	57,171	54,237	
SUMMER	167,450	171,110	170,792	168,637	166,816	172,326	178,851	164,878	168,106	151,680	146,670	137,851	146,642	121,209	126,688	125,940	129,558	132,604	328,530	317,780	308,633	315,279	288,055	288,964	304,791	294,436	328,530	317,780	308,633	315,279	288,055	288,964	304,791	294,436	301,710	
SPRING	211,310	215,280	213,988	207,214	208,655	215,257	226,814	204,319	192,907	156,660	153,920	142,505	139,409	123,546	133,677	126,516	124,720	129,123	387,970	369,200	356,493	346,623	332,201	349,234	355,330	329,039	387,970	369,200	356,493	346,623	332,201	349,234	355,330	329,039	322,030	
AUTUMN	133,190	130,290	142,559	138,342	139,862	145,171	142,310	133,723	138,334	84,950	84,910	74,705	82,836	71,985	71,320	58,877	65,552	66,807	218,140	215,200	217,284	221,168	211,947	216,491	201,187	198,275	218,140	215,200	217,284	221,168	211,947	216,491	201,187	198,275	203,941	
WINTER	223,370	220,720	221,802	227,739	233,326	246,899	252,479	230,902	219,902	56,910	50,390	49,890	55,596	49,168	51,757	47,084	45,854	59,405	280,290	271,090	271,090	271,692	296,318	293,094	300,656	276,756	280,290	271,090	271,692	296,318	293,094	300,656	276,756	270,327		
YEAR	735,320	737,400	746,131	741,925	749,389	781,653	800,454	733,622	720,249	499,600	435,860	404,951	427,463	386,938	383,892	360,417	365,684	377,759	1,949,920	1,773,260	1,745,082	1,765,345	1,715,297	1,763,345	1,763,371	1,699,506	1,949,920	1,773,260	1,745,082	1,765,345	1,715,297	1,763,345	1,763,371	1,699,506	1,699,008	

Figures are based upon detailed reports provided by the Harbour Office and Jersey Airport.

N.B. Figures are for all passenger arrivals and include returning residents, day trippers and business visitors.

Monthly totals are effected by the number of weekends that fall in a particular month.

Summer = July and August, Spring = April to June, Autumn = September and October, Winter = January to March and November to December

## Appendix 16

## Passenger Arrivals from the UK 2002 - 2010

	TOTAL UK AIR ARRIVALS												TOTAL UK SEA ARRIVALS												TOTAL UK ARRIVALS																																																																																																																																																																																																																																																																																																																																																																																																																																				
	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040																																																																																																																																																																																																																																																																																																																																																																																																																						
JAN	29,871	30,113	30,447	31,788	32,076	34,546	35,850	32,077	29,084	2,202	2,032	1,588	1,244	1,507	1,581	1,453	1,337	1,664	32,073	32,145	32,035	33,032	33,583	36,107	37,303	33,414	32,073	32,145	32,035	33,032	33,583	36,107	37,303	33,414	32,073	32,145	32,035	33,032	33,583	36,107	37,303	33,414	30,728																																																																																																																																																																																																																																																																																																																																																																																																																		
FEB	32,622	32,177	35,298	33,881	33,320	37,030	41,709	34,985	35,193	2,720	2,484	2,510	2,418	1,837	1,719	2,062	1,753	2,454	35,342	34,661	37,808	36,289	37,157	38,749	43,771	36,738	37,647	35,942	34,661	37,808	36,289	37,157	38,749	43,771	36,738	37,647	35,942	34,661	37,808	36,289	37,157	38,749	43,771	36,738	37,647																																																																																																																																																																																																																																																																																																																																																																																																																
MAR	42,379	42,011	44,972	44,855	44,473	47,577	52,244	44,870	43,912	6,515	5,043	4,262	5,541	3,151	3,507	3,238	3,401	3,335	48,884	47,054	47,234	50,396	47,624	51,084	55,482	47,871	47,247	48,884	47,054	47,234	50,396	47,624	51,084	55,482	47,871	47,247	48,884	47,054	47,234	50,396	47,624	51,084	55,482	47,871	47,247																																																																																																																																																																																																																																																																																																																																																																																																																
APR	47,516	55,714	54,972	49,274	54,183	55,642	56,638	50,513	41,125	10,569	10,763	9,406	8,755	8,492	8,387	6,508	8,523	11,591	58,085	66,477	64,378	58,029	62,675	64,039	63,146	59,036	52,716	58,085	66,477	64,378	58,029	62,675	64,039	63,146	59,036	52,716	58,085	66,477	64,378	58,029	62,675	64,039	63,146	59,036	52,716																																																																																																																																																																																																																																																																																																																																																																																																																
MAY	59,830	65,440	64,237	65,257	59,907	65,454	69,398	61,135	58,428	12,692	13,045	10,063	10,576	9,936	9,347	10,049	10,186	9,419	72,582	78,485	74,300	75,533	69,303	74,801	79,447	71,321	67,847	72,582	78,485	74,300	75,533	69,303	74,801	79,447	71,321	67,847	72,582	78,485	74,300	75,533	69,303	74,801	79,447	71,321	67,847																																																																																																																																																																																																																																																																																																																																																																																																																
JUN	69,682	66,653	66,233	65,249	66,231	68,156	66,995	61,687	62,999	18,216	13,753	12,589	12,185	10,002	10,377	9,451	11,093	9,343	87,888	79,406	78,822	77,434	76,233	78,533	76,446	72,760	72,342	87,888	79,406	78,822	77,434	76,233	78,533	76,446	72,760	72,342	87,888	79,406	78,822	77,434	76,233	78,533	76,446	72,760	72,342																																																																																																																																																																																																																																																																																																																																																																																																																
JUL	69,104	71,535	75,181	74,421	74,504	73,354	73,844	68,830	70,529	20,264	18,379	17,301	15,910	13,177	13,596	12,825	14,117	12,558	89,388	88,914	92,492	90,321	87,381	87,250	86,669	82,947	83,387	89,388	88,914	92,492	90,321	87,381	87,250	86,669	82,947	83,387	89,388	88,914	92,492	90,321	87,381	87,250	86,669	82,947																																																																																																																																																																																																																																																																																																																																																																																																																	
AUG	77,389	80,054	75,975	73,975	73,244	79,444	80,493	73,282	75,280	24,695	22,574	21,683	22,133	17,759	17,243	18,994	19,859	18,600	102,084	102,628	97,658	96,108	91,003	96,687	99,487	93,121	93,860	102,084	102,628	97,658	96,108	91,003	96,687	99,487	93,121	93,860	102,084	102,628	97,658	96,108	91,003	96,687	99,487	93,121	93,860																																																																																																																																																																																																																																																																																																																																																																																																																
SEP	63,084	62,915	66,917	66,297	67,205	70,377	65,240	62,334	62,649	16,409	15,170	13,466	12,281	10,442	10,214	9,013	10,785	10,085	79,493	78,085	80,403	78,588	77,647	80,591	74,253	73,119	72,734	79,493	78,085	80,403	78,588	77,647	80,591	74,253	73,119	72,734	79,493	78,085	80,403	78,588	77,647	80,591	74,253	73,119	72,734																																																																																																																																																																																																																																																																																																																																																																																																																
OCT	51,495	49,673	56,012	52,934	54,042	56,778	54,352	52,837	54,404	10,191	10,382	8,226	8,680	8,387	8,122	6,720	7,435	7,586	61,686	60,065	64,238	61,614	62,429	64,900	61,072	61,990	61,686	60,065	64,238	61,614	62,429	64,900	61,072	60,022	61,990	61,686	60,065	64,238	61,614	62,429	64,900	61,072	60,022	61,990	61,686	60,065	64,238	61,614	62,429	64,900	61,072	60,022	61,990																																																																																																																																																																																																																																																																																																																																																																																																								
NOV	39,334	38,455	38,345	41,683	44,846	47,682	41,830	40,975	39,480	4,469	3,306	3,455	3,018	3,034	2,835	1,975	2,259	2,475	43,833	41,761	41,800	44,701	47,880	50,527	43,805	42,934	43,833	41,761	41,800	44,701	47,880	50,527	43,805	42,934	43,833	41,761	41,800	44,701	47,880	50,527	43,805	42,934	43,833	41,761	41,800	44,701	47,880	50,527	43,805	42,934	43,833	41,761	41,800	44,701	47,880	50,527	43,805	42,934	43,833	41,761	41,800	44,701	47,880	50,527	43,805	42,934	43,833	41,761	41,800	44,701	47,880	50,527	43,805	42,934	43,833	41,761	41,800	44,701	47,880	50,527	43,805	42,934	43,833	41,761	41,800	44,701	47,880	50,527	43,805	42,934	43,833	41,761	41,800	44,701	47,880	50,527	43,805	42,934	43,833	41,761	41,800	44,701	47,880	50,527	43,805	42,934	43,833	41,761	41,800	44,701	47,880	50,527	43,805	42,934	43,833	41,761	41,800	44,701	47,880	50,527	43,805	42,934	43,833	41,761	41,800	44,701	47,880	50,527	43,805	42,934	43,833	41,761	41,800	44,701	47,880	50,527	43,805	42,934	43,833	41,761	41,800	44,701	47,880	50,527	43,805	42,934	43,833	41,761	41,800	44,701	47,880	50,527	43,805	42,934	43,833	41,761	41,800	44,701	47,880	50,527	43,805	42,934	43,833	41,761	41,800	44,701	47,880	50,527	43,805	42,934	43,833	41,761	41,800	44,701	47,880	50,527	43,805	42,934	43,833	41,761	41,800	44,701	47,880	50,527	43,805	42,934	43,833	41,761	41,800	44,701	47,880	50,527	43,805	42,934	43,833	41,761	41,800	44,701	47,880	50,527	43,805	42,934	43,833	41,761	41,800	44,701	47,880	50,527	43,805	42,934	43,833	41,761	41,800	44,701	47,880	50,527	43,805	42,934	43,833	41,761	41,800	44,701	47,880	50,527	43,805	42,934	43,833	41,761	41,800	44,701	47,880	50,527	43,805	42,934	43,833	41,761	41,800	44,701	47,880	50,527	43,805	42,934	43,833	41,761	41,800	44,701	47,880	50,527	43,805	42,934	43,833	41,761	41,800	44,701	47,880	50,527	43,805	42,934	43,833	41,761	41,800	44,701	47,880	50,527	43,805	42,934	43,833	41,761	41,800	44,701	47,880	50,527	43,805	42,934	43,833	41,761	41,800	44,701	47,880	50,527	43,805	42,934	43,833	41,761	41,800	44,701	47,880	50,527	43,805	42,934	43,833	41,761	41,800	44,701	47,880	50,527	43,805	42,934	43,833	41,761	41,800	44,701	47,880	50,527	43,805	42,934	43,833	41,761	41,800	44,701	47,880	50,527	43,805	42,934	43,833	41,761	41,800	44,701	47,880	50,527	43,805	42,934	43,833	41,761	41,800	44,701	47,880	50,527	43,805	42,934	43,833	41,761	41,800	44,701	47,880	50,527	43,805	42,934	43,833	41,761	41,800	44,701	47,880	50,527	43,805	42,934	43,833	41,761	41,800	44,701	47,880	50,527	43,805	42,934	43,833	41,761	41,800	44,701	47,880	50,527	43,805	42,934	43,833	41,761	41,800	44,701	47,880	50,527	43,805	42,934	43,833	41,761	41,800	44,701	47,880	50,527	43,805	42,934	43,833	41,761	41,800	44,701	47,880	50,527	43,805	42,934	43,833	41,761	41,800	44,701	47,880	50,527	43,805	42,934	43,833	41,761	41,800	44,701	47,880	50,527	43,805	42,934	43,833	41,761	41,800	44,701	47,880	50,527	43,805	42,934	43,833	41,761	41,800	44,701	47,880	50,527	43,805	42,934	43,833	41,761	41,800	44,701	47,880	50,527	43,805	42,934	43,833	41,761	41,800	44,701	47,880	50,527	43,805	42,934	43,833	41,761	41,800	44,701	47,880	50,527	43,805	42,934	43,833	41,761	41,800</

Figures are based upon detailed reports provided by the Harbour Office and Jersey Airport.

N.B. Figures are for all passenger arrivals and include returning residents, day trippers and business visitors.

Monthly totals are effected by the number of weekends that fall in a particular month.

Summer = July and August, Spring = April to June, Autumn = September and October, Winter = January to March and November to December

## Appendix 17

## Inter-Island Passenger Arrivals 2002 - 2010

	TOTAL INTER-ISLAND AIR ARRIVALS												TOTAL INTER-ISLAND SEA ARRIVALS												TOTAL INTER-ISLAND ARRIVALS											
	2002	2003	2004	2005	2006	2007	2008	2009	2010	2002	2003	2004	2005	2006	2007	2008	2009	2010	2002	2003	2004	2005	2006	2007	2008	2009	2010	2002	2003	2004	2005	2006	2007	2008	2009	2010
JAN	5,999	5,191	4,716	5,051	4,885	5,300	5,603	5,095	4,275	330	279	731	220	533	414	345	261	473	5,729	5,470	5,447	5,271	5,368	5,714	5,948	5,356	4,748	6,438	6,942	6,571	6,568	5,810	6,390	6,619	6,223	5,954
FEB	5,633	6,217	5,565	5,188	5,051	5,691	6,049	5,396	5,376	805	625	1,006	1,380	799	689	570	827	578	9,131	7,903	8,008	8,650	7,890	8,803	7,995	7,506	8,599	12,421	13,351	11,464	11,164	10,120	10,892	10,802	9,768	8,649
MAR	6,823	6,888	6,576	6,154	6,869	7,296	7,071	6,589	7,612	2,308	1,015	1,432	2,496	1,221	1,547	924	917	987	15,047	15,063	14,003	13,051	11,350	13,358	14,635	12,894	13,508	19,014	14,981	14,139	14,529	14,483	14,416	14,400	13,463	12,224
APR	7,106	6,088	6,022	5,781	5,588	5,873	7,249	5,705	5,644	5,315	7,253	5,442	5,383	4,532	5,019	3,553	4,063	3,005	18,649	17,668	16,090	16,097	14,074	14,006	14,846	15,215	15,094	23,386	18,840	15,817	17,615	17,350	13,668	17,461	18,256	17,981
MAY	6,938	5,592	6,410	5,927	5,948	6,044	7,052	5,635	6,360	8,109	9,471	7,593	7,124	5,502	7,314	7,583	7,259	7,148	15,047	15,063	14,003	13,051	11,350	13,358	14,635	12,894	13,508	19,014	14,981	14,139	14,529	14,483	14,416	14,400	13,463	12,224
JUN	5,972	5,470	6,356	6,356	6,827	7,151	7,143	7,023	6,534	13,042	9,511	7,783	8,173	7,656	7,265	7,257	6,440	5,690	8,381	8,179	8,302	7,741	7,551	8,632	7,889	7,837	8,037	7,071	6,969	7,214	6,823	7,056	6,511	6,538	6,889	6,579
JUL	5,965	6,016	6,164	5,888	5,882	5,818	7,019	6,221	6,597	12,684	11,652	9,926	10,209	8,192	8,188	7,827	8,994	8,507	17,606	13,923	13,692	14,986	14,889	13,925	12,583	12,774	13,412	12,109	14,181	10,995	12,102	10,097	11,000	9,885	9,077	9,917
AUG	5,912	4,642	5,127	5,905	5,679	5,854	6,372	5,313	5,760	17,424	14,188	10,690	12,110	11,671	12,514	11,089	12,943	12,221	23,386	18,840	15,817	17,615	17,350	13,668	17,461	18,256	17,981	23,386	18,840	15,817	17,615	17,350	13,668	17,461	18,256	17,981
SEP	6,721	5,921	6,211	6,339	6,295	6,400	7,243	6,564	7,012	10,885	8,002	7,481	8,647	8,594	7,525	5,340	6,210	6,400	17,606	13,923	13,692	14,986	14,889	13,925	12,583	12,774	13,412	12,109	14,181	10,995	12,102	10,097	11,000	9,885	9,077	9,917
OCT	6,448	6,462	6,903	6,443	6,711	6,613	7,389	6,694	7,020	5,661	7,719	4,092	5,659	3,386	4,387	2,496	2,383	2,897	12,109	14,181	10,995	12,102	10,097	11,000	9,885	9,077	9,917	8,381	8,179	8,302	7,741	7,551	8,632	7,889	7,837	8,037
NOV	7,494	6,997	7,423	6,907	6,915	7,564	7,058	7,131	6,801	887	1,182	879	834	636	1,068	631	706	1,236	8,381	8,179	8,302	7,741	7,551	8,632	7,889	7,837	8,037	7,071	6,969	7,214	6,823	7,056	6,511	6,538	6,889	6,579
DEC	5,484	5,125	5,729	5,133	5,325	5,274	5,360	5,395	4,592	1,987	1,244	1,485	1,490	1,731	1,037	1,158	1,504	1,887	7,071	6,969	7,214	6,823	7,056	6,511	6,538	6,889	6,579	7,071	6,969	7,214	6,823	7,056	6,511	6,538	6,889	6,579
SUMMER	11,877	10,658	11,291	11,393	11,561	11,672	13,391	11,534	12,347	30,108	25,850	20,616	22,319	19,863	20,702	18,916	21,937	20,728	41,985	36,508	31,907	33,712	31,424	32,374	32,307	33,471	33,075	41,985	36,508	31,907	33,712	31,424	32,374	32,307	33,471	33,075
SPRING	20,016	17,160	18,798	18,064	18,263	19,088	21,444	18,383	18,538	26,466	26,235	20,818	20,690	17,690	19,898	18,393	17,762	15,843	46,482	43,395	39,606	38,744	35,953	38,666	39,637	36,125	34,381	46,482	43,395	39,606	38,744	35,953	38,666	39,637	36,125	34,381
AUTUMN	13,169	12,383	13,114	12,782	13,006	13,013	14,632	13,258	14,032	16,546	15,721	11,573	14,306	11,980	11,912	7,836	8,563	9,297	29,715	28,104	24,687	27,088	24,986	24,925	22,468	21,851	23,329	29,715	28,104	24,687	27,088	24,986	24,925	22,468	21,851	23,329
WINTER	30,833	30,418	30,009	28,433	28,795	31,085	31,161	29,668	28,656	5,917	4,345	5,533	6,420	4,890	4,765	3,658	4,215	5,261	36,750	34,763	35,542	34,853	33,675	35,850	34,789	33,811	33,917	36,750	34,763	35,542	34,853	33,675	35,850	34,789	33,811	33,917
YEAR	75,895	70,619	73,202	70,672	71,625	74,838	80,628	72,751	73,573	78,037	72,151	58,540	63,725	54,413	56,877	48,773	52,507	51,129	154,932	142,770	131,742	134,397	126,038	131,815	123,401	125,298	124,702	154,932	142,770	131,742	134,397	126,038	131,815	123,401	125,298	124,702

Figures are based upon detailed reports provided by the Harbour Office and Jersey Airport.

N.B. Figures are for all passenger arrivals and include returning residents, day trippers and business visitors.

Monthly totals are effected by the number of weekends that fall in a particular month.

Summer = July and August, Spring = April to June, Autumn = September and October, Winter = January to March and November to December

## Appendix 18

## Continental Passenger Arrivals 2002 - 2010

	TOTAL CONTINENTAL AIR ARRIVALS										TOTAL CONTINENTAL SEA ARRIVALS										TOTAL CONTINENTAL ARRIVALS															
	2002	2003	2004	2005	2006	2007	2008	2009	2010	2002	2003	2004	2005	2006	2007	2008	2009	2010	2002	2003	2004	2005	2006	2007	2008	2009	2010	2002	2003	2004	2005	2006	2007	2008	2009	2010
JAN	2,993	2,617	1,821	1,643	1,892	1,800	1,964	2,723	2,320	4,439	4,520	5,005	5,304	4,982	5,370	4,871	5,202	5,295	7,332	7,137	4,826	6,947	6,874	7,170	6,895	7,985	7,332	7,137	4,826	6,947	6,874	7,170	6,895	7,985	7,615	
FEB	2,598	1,907	1,021	1,417	1,222	1,487	2,180	2,194	1,807	4,678	5,763	6,141	7,811	6,135	6,237	7,425	6,422	6,527	7,266	7,670	7,162	9,228	7,357	7,724	9,605	8,606	8,334	7,162	9,228	7,357	7,724	9,605	8,606	8,334		
MAR	2,527	2,410	1,466	1,658	1,461	606	1,507	1,855	1,341	9,063	9,404	5,903	10,579	7,144	10,138	8,322	7,368	8,028	11,590	11,814	7,369	12,237	8,635	10,744	9,829	9,223	9,369	7,369	12,237	8,635	10,744	9,829	9,223	9,369		
APR	3,608	3,908	2,615	2,999	2,727	1,047	3,083	3,924	2,515	19,953	24,910	24,782	20,600	22,518	25,369	22,019	21,539	23,207	23,561	28,418	27,397	22,999	25,245	26,416	25,102	25,463	25,722	23,561	28,418	27,397	22,999	25,245	26,416	25,102	25,463	
MAY	5,064	3,626	3,500	3,398	3,666	2,032	4,837	4,629	4,496	31,576	30,565	30,200	30,751	25,284	29,226	30,273	27,613	27,562	36,640	34,131	33,700	34,059	28,950	31,258	35,110	32,242	32,078	36,640	34,131	33,700	34,059	28,950	31,258	35,110	32,242	
JUN	5,539	4,173	3,643	3,663	3,678	3,858	4,419	4,088	4,804	37,184	34,704	34,647	37,265	33,052	32,588	32,772	30,934	31,452	42,723	38,877	38,290	39,525	33,842	35,521	36,242	36,256	36,256	38,290	39,525	33,842	35,521	36,242	36,256	36,256		
JUL	4,730	4,513	4,585	4,467	3,990	3,921	5,444	5,495	5,582	37,492	32,616	36,589	37,265	33,052	32,588	32,772	30,934	31,452	42,723	38,877	38,290	39,525	33,842	35,521	36,242	36,256	36,256	38,290	39,525	33,842	35,521	36,242	36,256	36,256		
AUG	4,349	4,355	3,750	4,391	3,817	3,935	5,679	5,757	5,388	48,519	47,245	41,662	49,015	37,388	41,929	42,430	42,711	45,385	52,868	51,600	45,412	53,406	41,205	45,864	48,112	48,468	50,773	52,868	51,600	45,412	53,406	41,205	45,864	48,112	48,468	
SEP	3,228	3,108	3,390	3,364	3,335	3,156	5,166	3,816	4,342	31,214	29,602	29,080	32,914	29,743	29,588	24,398	25,791	26,748	34,442	32,710	32,470	36,278	33,078	32,744	29,554	29,607	31,090	34,442	32,710	32,470	36,278	33,078	32,744	29,554	29,607	
OCT	2,212	2,217	3,126	2,965	2,374	1,847	2,930	1,728	2,907	10,588	14,029	12,340	14,635	11,433	11,484	10,910	12,948	11,871	12,800	16,246	15,466	17,600	13,807	13,331	13,540	14,778	12,800	16,246	15,466	17,600	13,807	13,331	13,540	14,778		
NOV	1,749	1,196	850	1,222	867	1,464	1,693	1,241	959	6,195	5,519	7,596	7,463	7,347	8,025	6,099	4,711	4,918	7,944	6,715	8,386	8,685	8,214	9,489	7,792	5,877	7,944	6,715	8,386	8,685	8,214	9,489	7,792	5,877		
DEC	1,287	972	755	760	838	1,157	1,703	1,137	979	7,888	5,532	7,540	6,657	6,699	5,577	5,723	6,712	7,029	9,195	6,324	8,295	7,417	7,697	6,724	7,849	8,038	9,195	6,324	8,295	7,417	7,697	6,724	7,849	8,038		
SUMMER	9,079	8,868	8,335	8,658	7,807	7,856	11,123	11,252	10,970	86,011	79,861	78,251	86,290	70,440	74,797	75,205	73,645	80,261	95,080	88,729	86,586	95,138	78,247	82,653	86,328	84,897	91,231	95,080	88,729	86,586	95,138	78,247	82,653	86,328	84,897	
SPRING	14,211	11,307	9,758	9,370	10,071	6,837	12,339	12,641	11,815	85,713	90,119	89,629	87,213	77,966	86,259	84,115	77,156	82,241	102,924	101,426	99,397	96,593	88,037	93,195	96,454	89,797	94,056	102,924	101,426	99,397	96,593	88,037	93,195	96,454	89,797	
AUTUMN	5,440	5,325	6,516	6,329	5,709	5,003	8,086	5,544	7,249	41,802	43,631	41,420	47,549	41,176	41,072	35,308	38,739	38,619	47,242	48,956	47,936	53,878	46,885	46,075	43,394	44,283	45,868	47,242	48,956	47,936	53,878	46,885	46,075	43,394	44,283	
WINTER	11,044	9,102	5,913	6,700	6,310	6,514	9,050	9,140	7,405	32,273	30,598	30,125	37,814	32,467	35,347	32,440	30,415	31,797	43,317	39,680	36,038	44,514	38,777	41,861	41,690	39,555	39,203	43,317	39,680	36,038	44,514	38,777	41,861	41,690	39,555	
YEAR	39,774	34,602	30,522	31,257	29,897	26,310	40,598	38,977	37,440	245,799	244,169	239,425	256,856	222,049	237,474	227,068	219,955	232,916	288,573	276,771	269,947	290,113	251,946	263,784	267,666	259,532	270,358	288,573	276,771	269,947	290,113	251,946	263,784	267,666	259,532	

Figures are based upon detailed reports provided by the Harbour Office and Jersey Airport.

N.B. Figures are for all passenger arrivals and include returning residents, day trippers and business visitors.

Monthly totals are effected by the number of weekends that fall in a particular month.

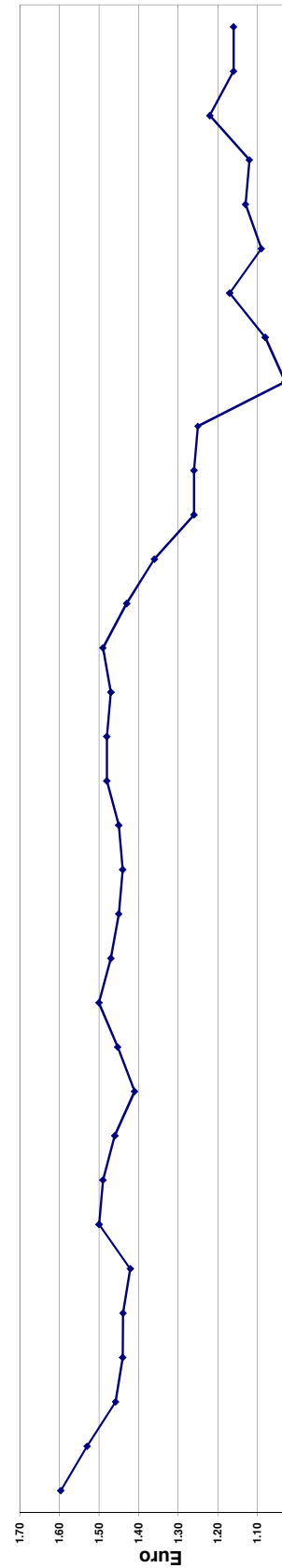
Summer = July and August, Spring = April to June, Autumn = September and October, Winter = January to March and November to December

## Appendix 19

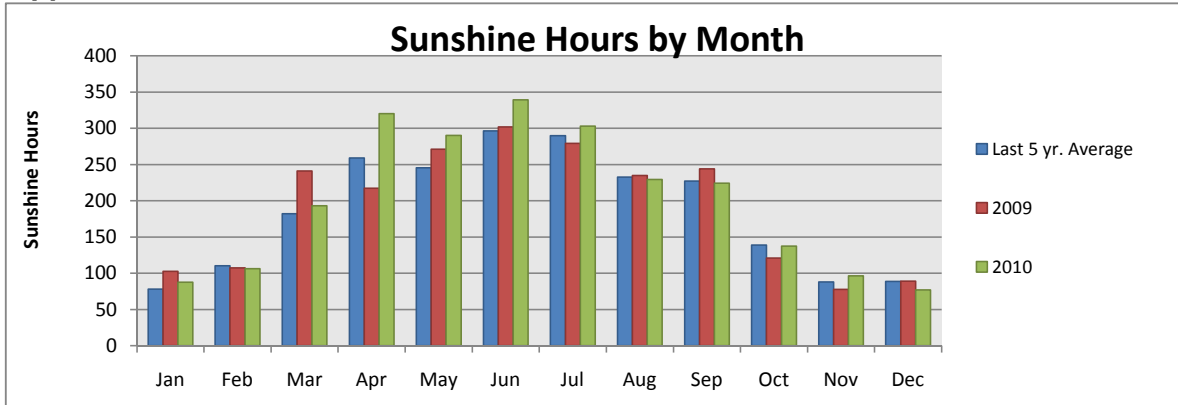
### Selected exchange rates against sterling since September 2002

	Dan	Nor	Swe	Swtz	Euro	USA	Can	Aus	Japan
2002 Sep	11.86	11.68	14.61	2.34	1.60	1.56	2.46	2.87	190.96
2002 Dec	11.40	11.16	14.05	2.23	1.53	1.60	2.53	2.85	190.13
2003 Mar	10.83	11.51	13.43	2.15	1.46	1.57	2.30	2.61	188.32
2003 Jun	10.73	11.96	13.25	2.23	1.44	1.65	2.23	2.48	197.39
2003 Sep	10.69	11.66	12.84	2.22	1.44	1.66	2.25	2.46	184.51
2003 Dec	10.58	11.96	12.89	2.22	1.42	1.78	2.33	2.38	190.39
2004 Mar	11.14	12.64	13.88	2.34	1.50	1.83	2.39	2.42	193.02
2004 Jun	11.09	12.48	13.61	2.28	1.49	1.81	2.43	2.62	195.13
2004 Sep	10.87	12.21	13.22	2.27	1.46	1.80	2.29	2.52	199.41
2004 Dec	10.49	11.64	12.71	2.18	1.41	1.92	2.32	2.47	197.96
2005 Mar	10.82	11.89	13.27	2.25	1.45	1.88	2.29	2.44	202.24
2005 Jun	11.14	11.82	14.12	2.31	1.50	1.80	2.21	2.37	199.06
2005 Sep	10.94	11.48	13.69	2.28	1.47	1.76	2.06	2.32	199.19
2005 Dec	10.77	11.95	13.18	2.24	1.45	1.88	2.34	2.43	195.00
2006 Mar	10.73	11.46	13.53	2.27	1.44	1.75	2.03	2.45	200.79
2006 Jun	10.78	11.42	13.35	2.26	1.45	1.81	2.02	2.48	210.51
2006 Sep	11.02	12.13	13.67	2.39	1.48	1.87	2.08	2.51	220.82
2006 Dec	11.06	12.19	13.39	2.39	1.48	1.96	2.28	2.48	233.20
2007 Mar	10.97	11.94	13.73	2.39	1.47	1.96	2.27	2.43	231.44
2007 Jun	11.05	11.85	13.76	2.46	1.49	2.00	2.31	2.36	247.77
2007 Sep	10.66	11.09	13.20	2.37	1.43	2.02	2.03	2.30	234.08
2007 Dec	10.11	10.79	12.81	2.25	1.36	1.99	1.95	2.27	225.43
2008 Mar	9.41	10.17	11.85	1.99	1.26	1.99	2.03	2.17	196.35
2008 Jun	9.43	10.09	11.91	2.03	1.26	1.99	2.01	2.07	211.39
2008 Sep	9.35	10.44	12.19	1.98	1.25	1.81	1.87	2.22	189.73
2008 Dec	7.70	10.75	11.37	1.53	1.03	1.43	1.77	2.06	130.33
2009 Mar	8.04	9.68	11.85	1.63	1.08	1.43	1.80	2.06	141.57
2009 Jun	8.74	10.60	12.76	1.79	1.17	1.65	1.91	2.04	156.90
2009 Sep	8.15	9.28	11.18	1.66	1.09	1.60	1.72	1.81	143.20
2009 Dec	8.39	9.37	11.57	1.67	1.13	1.62	1.70	1.80	150.51
2010 Mar	8.36	9.02	10.93	1.59	1.12	1.52	1.54	1.66	141.83
2010 Jun	9.06	9.70	11.60	1.61	1.22	1.50	1.59	1.76	132.38
2010 Sep	8.62	9.28	10.65	1.54	1.16	1.57	1.62	1.63	131.41
2010 Dec	8.68	9.09	10.50	1.46	1.16	1.56	1.55	1.52	126.60

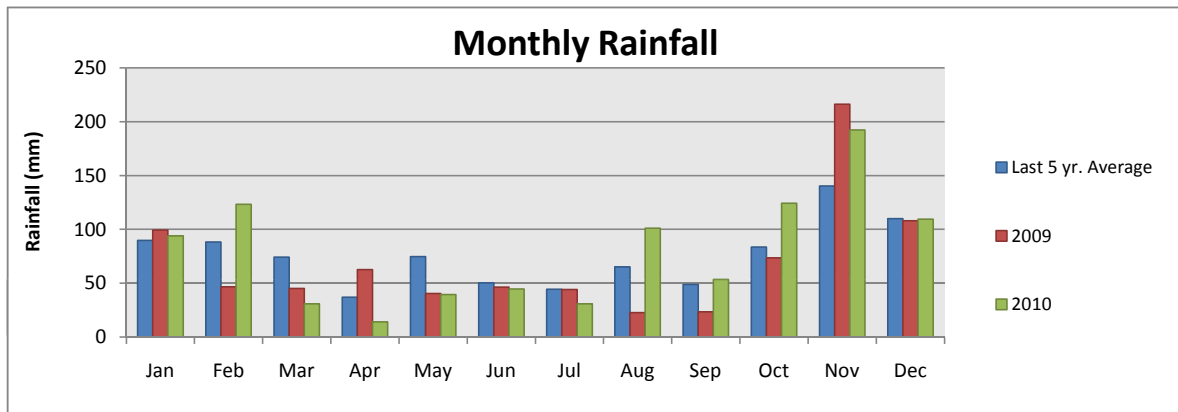
£ Sterling vs. Euro 2002 – 2010



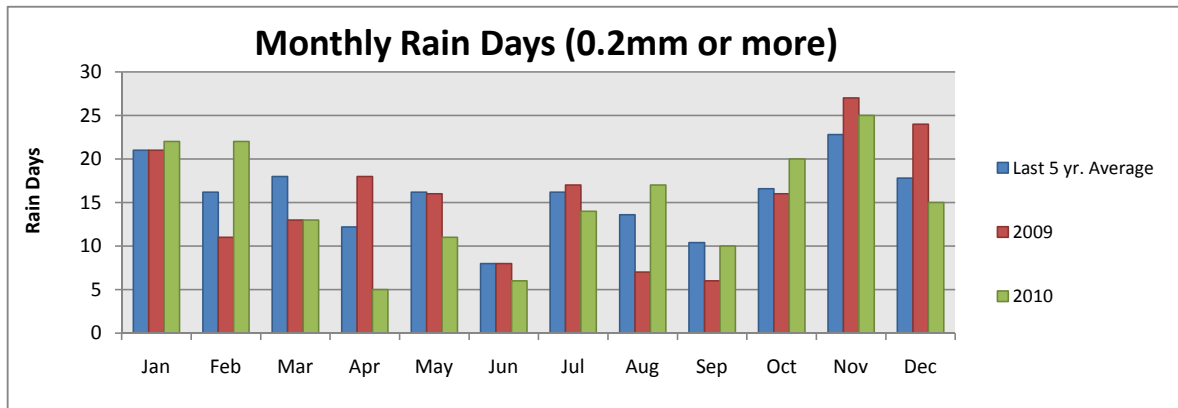
## Appendix 20



Figures are recorded at Fort Regent



Figures are recorded at St. Louis Observatory



Figures are recorded at St. Louis Observatory

Source: Jersey Meteorological Department

[www.jerseymet.gov.je](http://www.jerseymet.gov.je)

## VISITOR REGISTRATION CARD

0362784

UNDER THE PROVISIONS OF THE IMMIGRATION (HOTEL RECORDS) (JERSEY) ORDER 1999 & TOURISM (GENERAL PROVISIONS) (JERSEY) ORDER 1990: ONE CARD MUST BE COMPLETED PER OCCUPIED ROOM.

NUMBER IN ROOM	Adults	Children under 16	VRC
<b>FIRST ADULT (16+)</b> (full name and nationality must be completed for all adults within a room)			
Surname			
Forename			
Title (Mr/s etc.)			
Nationality			
<b>SECOND ADULT (16+)</b>			
Surname			
Forename			
Nationality			
<b>THIRD ADULT (16+)</b>			
Surname			
Forename			
Nationality			
<b>FOURTH ADULT (16+)</b>			
Surname			
Forename			
Nationality			

ARRIVAL DATE	DEPARTURE DATE	
DD MM YY	DD MM YY	DD MM YY
20	20	20
<b>MAIN PURPOSE OF VISIT</b> (First adult only)		
<input type="checkbox"/> Holiday	<input type="checkbox"/> Sport	<input type="checkbox"/> Other
<input type="checkbox"/> Business	<input type="checkbox"/> Conference	<input type="checkbox"/>
<b>COUNTRY OF RESIDENCE</b> (First adult only)		
<input type="checkbox"/> U.K.	<input type="checkbox"/> Ireland	<input type="checkbox"/> Jersey
<input type="checkbox"/> Other (please state)	<input type="checkbox"/> Other C.I.	<input type="checkbox"/>
<b>HOME ADDRESS</b>		
House No.	Postcode	
House Address		
<b>WHEN DID YOU BOOK YOUR VISIT?</b>		
Less than 1 month ago	<input type="checkbox"/> 1-3 months ago	<input type="checkbox"/> More than 3 months ago
<b>DID YOU BOOK YOUR ACCOMMODATION DIRECT WITH THE ESTABLISHMENT?</b>		
No	<input type="checkbox"/>	Yes <input type="checkbox"/>
<b>HOW DID YOU TRAVEL TO JERSEY?</b>		
By air	<input type="checkbox"/>	By sea <input type="checkbox"/>
<b>HAVE YOU VISITED JERSEY BEFORE?</b>		
No	<input type="checkbox"/>	Yes <input type="checkbox"/>

SIGNATURE

If you do not wish to receive further information from Jersey Tourism or associated companies, please tick this box. ☐

THANK YOU FOR YOUR CO-OPERATION. WE WISH YOU A PLEASANT STAY.



