Jersey Tourism

Some Interesting Figures from 2013

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R.105/2014

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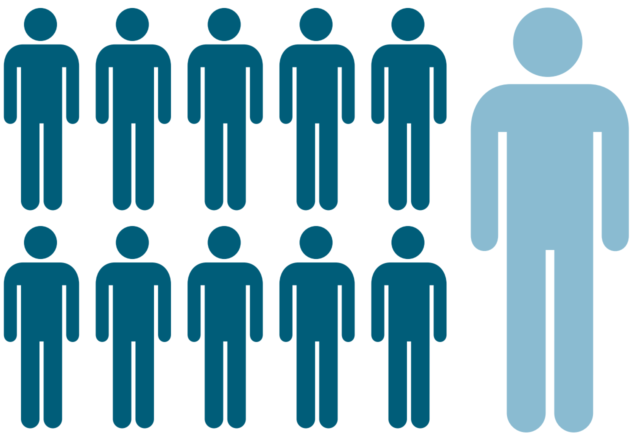


There are 10 visitors to Jersey
for every local resident.

SINCE **2009** GERMAN SPEAKING MARKETS, HAVE **GROWN** EVERY YEAR FROM **11,890** TO **18,360**

100k

Visits to friends and relations

149k +

Day trip visitors in 2013

11

THE AVERAGE NUMBER OF TIMES **90%** OF **ABC1 ADULTS** SAW THE **UK CAMPAIGN**

JERSEY RECEIVED

1,364

PIECES OF PR COVERAGE

LEISURE VISITORS LENGTH OF STAY HAS BEEN STATIC FOR THE PAST **4** YEARS AT AN AVERAGE OF **4.3** NIGHTS

Visitors spend £228m. in Jersey providing GST receipts of over £11m

JERSEY HAD

207

MEDIA VISITS IN 2013

Contents

Foreword from the Minister for Economic Development

The main features for which the 2013 season will be remembered are the recovery which took place as the weather improved in June as UK consumers responded to better economic news following years of low confidence, which had been affecting tourism to Jersey as well as other destinations.

Our statistics provide a mixed picture with a reduction in staying leisure visitors from the UK and Ireland and increases from a number of European source markets such as Germany, Switzerland and France. Overall the value of on-Island spend by visitors matched the 2012 levels at nearly £228m.

As the dominant source market for Jersey, the performance in the UK is always going to have a strong impact on the final result , and therefore the improvement in that economy can only be good news for Jersey going forward. Analysis of statistics showing UK resident trips abroad shows that in 2013 some 58.03m Britons travelled, still significantly down from the 69m.who travelled in 2008 before the effects of the recession started to impact. Jersey , despite some loss in volume has clearly fared more favourably than many other destinations during that 5 year period.

It is pleasing to note that increases were once again achieved in France, our nearest market after a poor year in 2012 when the coastal area of Brittany and Normandy had suffered from poor weather and the French recession. Germany continued to grow for the fifth year in succession reaching 14k. visitors with an average spend of over £800 per person.

Overall whilst the visitor economy has perhaps not been flourishing during the years of economic downturn we should take comfort from the fact that our market share has remained constant and that the industry is now in good shape to seize the growth opportunities which will no doubt emerge with an improving economic situation in the UK .

In the medium term a significant opportunity for Jersey lies in Europe and Scandinavia where there is an awareness of the Island and increasing demand for shorter holidays and more frequent breaks.

However breaking into these markets will require direct flights connecting Jersey on a point to point basis including some midweek connections to increase short stay options. For these new potential markets to be developed and sustained further investment will also be required in consumer marketing and trade support. These actions are likely to require investment from the industry as well as Government to build a partnership approach which will also require input from the Ports of Jersey in facilitating new air services.

Longer haul markets such as China and Russia also have potential, particularly if trading links are opened for financial and other services with the Island which can support the tourism offering.

One local handling agent is already promoting Jersey in Russian speaking markets, resulting in increasing numbers from the Ukraine region and a website has been developed in Mandarin in preparation for increased numbers of Chinese who will be attracted to Britain once visa restrictions are eased.

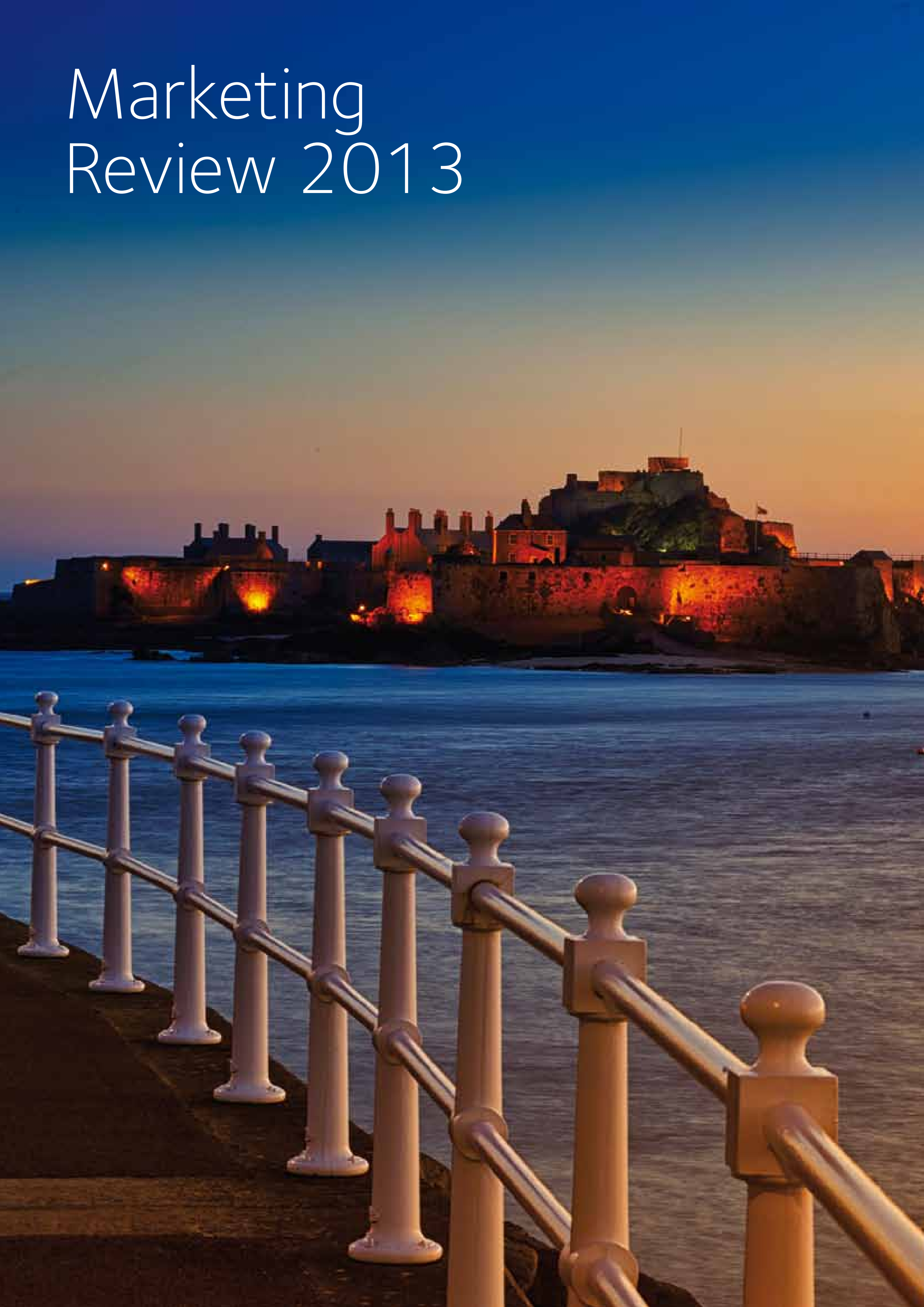
However for new overseas markets be developed there is more than just the travel package to be considered, and whilst Jersey has many attractive attributes with which to attract new clients there are also considerations of itinerary planning, language and guiding skills and tax rebates to be considered if we wish to be competitive .

During 2013 the Island has once again benefitted from a varied and comprehensive events programme which has provided animation and entertainment for both our local residents and visitors. Many events such as the Battle of Flowers and Air Display are only made possible because of the hours of voluntary work which are undertaken by the many who give their time and expertise and to whom we extend our since thanks. I would also like to include in this the honorary police and others who are such a necessary component of our outdoor event programme.

I would also like to take this opportunity of recognising the valuable contribution of my two Ministerial colleagues, Deputy Carolyn Labey and deputy James Baker who join me in thanking the all of the departmental staff for their superb efforts throughout another challenging year for tourism in Jersey.

Senator Alan Maclean
Minister for Economic Development

Marketing Review 2013



Jersey Tourism continues to invest significantly into the UK market, the main source of tourism to the Island. In addition to the impact on market development this investment also protects and supports route development of the essential air and sea links so important to island life. However, the UK market is highly competitive, with many new emerging destinations increasing consumer choice. The continued march of low-cost carriers opening new European routes and cut-price 'sunshine' destinations, along with deep discounting including in the burgeoning cruise market, presents many challenges for Jersey as a holiday destination.

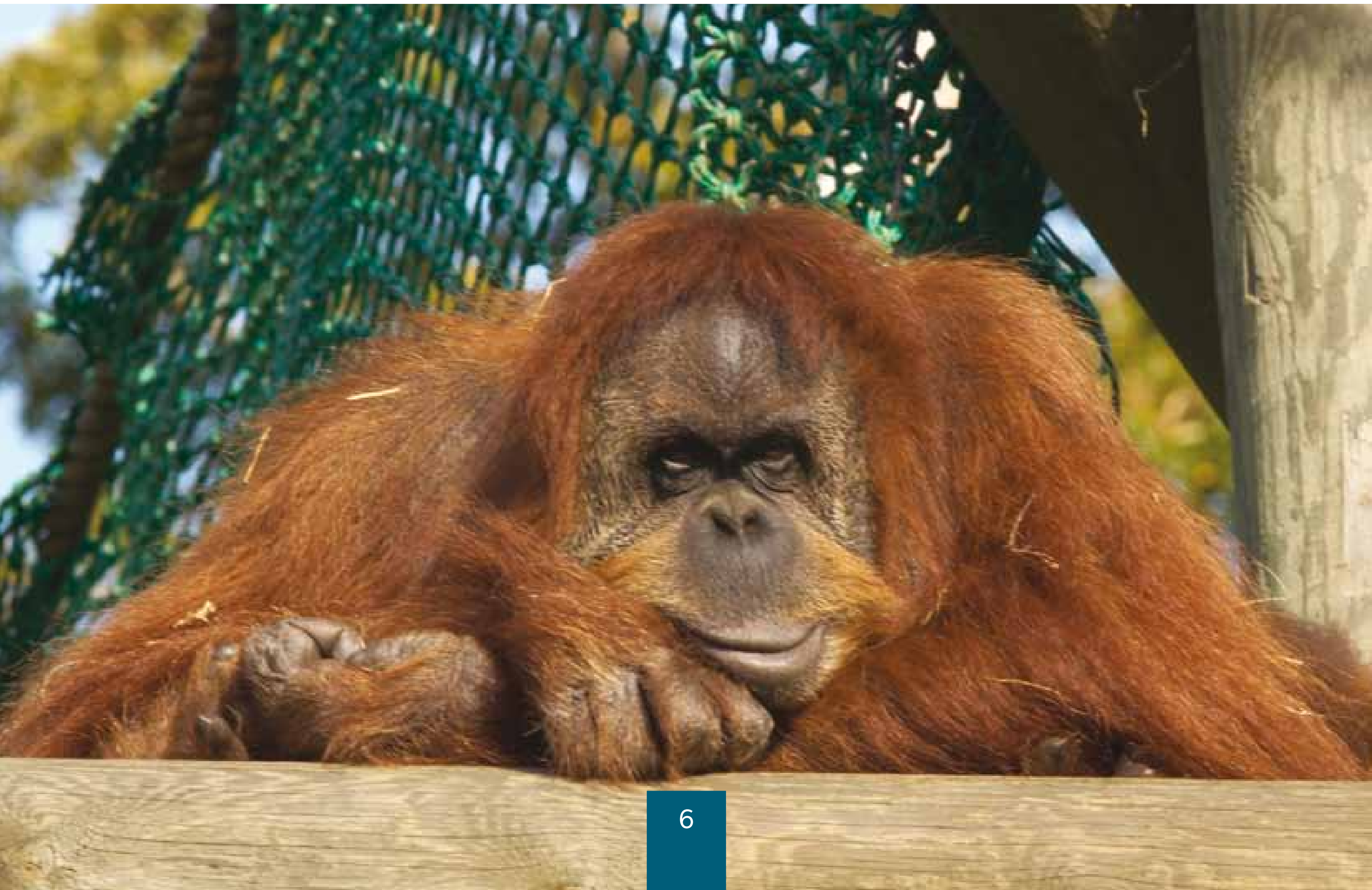
Whilst these challenges exist, it should not be forgotten that Jersey is a fantastic holiday destination, with a superb selection of travel and accommodation options and an ever-increasing number of trade partners offering packages. The beautiful natural environment, together with unique attractions such as Durrell Wildlife and the Jersey War Tunnels, leaves Jersey perfectly placed as an island getaway.

This natural environment and rich history also provide great opportunities within European markets for growth, principally in France and Germany. France still has ongoing economic pressures but 2013 saw French staying leisure visitors grow by 2% which was above the tourist trend in the west of France from which the majority of French visitors arrive.This growth was achieved following a significant marketing effort with carriers. Jersey suffered a period of negative press as a tax haven during the year, following the discovery of a key French politician investing in Jersey to minimize his tax in France. France also blacklisted Jersey as a tax haven for a period, which led to the island needing to defend its position until the blacklisting was lifted.

Germany has the strongest economy in Europe and continued efforts with German trade partners have encouraged 5 years of constant growth and a consequent improvement in market value.

Increased resources were placed into Europe, including the appointment of a PR partner in Amsterdam, following the launch of a new direct air link to the capital in early 2013. However, it was disappointing that the Dutch market for leisure visitors reduced during the year, impacted by the loss of the weekend direct charter flight service from Rotterdam.

Following various trips to China by the Economic Development (ED) Minister and ED Officers, China has been identified as a growth opportunity. A partnership has been developed with a trade partner and work has begun on a Chinese information website and a Chinese leaflet was produced in Mandarin for the first time.



UK Market

In 2013 UK visitor volume declined by 3.1%, spend per visitor increased by 2% and the value of the market reduced by -1%. This is only the second year that the overall value of the UK market has declined although perhaps not surprising following 5 consecutive years of economic difficulty in the UK. Overall GVA performance for the hotels , restaurants and bars sector grew by 3%, the only sector to show any growth in 2013 in Jersey.

The Industry has been fortunate that tourism marketing budgets have not been significantly reduced despite reduction in other areas of Government. This has enabled the deployment of a strategy to maintain the highest level of investment into TV marketing throughout the global recession, when many competitors have reduced marketing investment.

It is well documented that brands that increase or maintain advertising during a recession, when competitors are cutting back, can improve market share and return on investment at lower cost than during buoyant economic times. Uncertain consumers need the reassurance of known brands and with more consumers at home watching television, higher than expected audiences were delivered from the TV campaign at lower cost-per-thousand impressions.

For the longer term, excellent foundations have been laid upon which to build through consistent messaging through well targeted campaigns to key audiences.

TV remains a primary medium for the UK audience; it is the most compelling tool to visually communicate the island's key attributes.

TV delivery has been increased by 17%, maintaining investment at a consistent level. As a result, higher than predicted audience levels, coverage and frequency were exceeded across all stations and regions.

Jersey Tourism continued to use the 'Meet the Locals' theme from 2012 into 2013, to gain additional leverage and return on investment from the TV advertising. The campaign included four island ambassadors, enabling potential visitors to learn about their love of the island, experienced further through individual video clips of each of our ambassadors on jersey.com and YouTube.

A pattern of TV activity provided presence from Christmas 2012 to May 2013, using a 2 weeks-on, 2 weeks-off pattern. This was subsequently extended to include July, providing a late summer boost. The broad target market of ABC1 Adults, 21.4 million people were reached on TV, providing an average opportunity to see of 9.1 times. (81.8%).

Condor Ferries joined forces as part of the TV campaign. This increased buying power and as both ads ran during the same commercial break in key regions, both the Island and Condor Ferries benefited from an increase in awareness.

TV was supported with magazines and national press, to increase frequency of exposure. The press market remained depressed, enabling an increase in frequency which achieved a saving of 76% against rate card prices. Branding press reached 6.7 million of Jersey's primary market an average of 6 times. With TV and Press combined, the UK campaign reached an estimated 90% of ABC1 Adults market, who on average saw the advertising 11 times each, this excludes the extra frequency generated by our co-funded partner opportunities.

The distribution of pureJersey and stayJersey publications was supported by a dedicated brochure response campaign, from January through to April. Brand advertising was also supported through a range of digital activity.

In addition to daily posts on Facebook and Twitter, month-long social media campaigns were run promoting key product messages ran May/June and November/December, to increase engagement amongst Jersey Tourism's 30k plus Facebook community.

Jersey Tourism was shortlisted for 'Best Use of Social Media' in the 2013 Travolution Awards, together with travel heavy-weights P&O Ferries and TUI UK & Ireland (First Choice). Jersey Tourism was also shortlisted for 'Best Use of Media' at the CIM Jersey Awards.

Search engine optimisation [SEO] and pay per click [PPC] activity continued throughout the year via Google and Bing, with campaigns run through Microsoft (msn) and Tribal Fusion/Exponential in February/March. Banner display advertising similar to Google activity was used to extend the reach of online marketing across different networks, targeting the Top 5 Mosaic groups.

Throughout the year, 18 enewsletters were sent to selected 'warm' Jersey Tourism database contacts (over 120,000), which had either expressed an interest in visiting Jersey or had visited. enewsletters focused on the unique aspects of Jersey that appeal to key audiences, combined with partner offers to communicate value and encourage conversion from enquiries to bookings.

Brochure response and product-specific emails, including walking, were sent to selected contacts at key times of the year, in addition to the industry-focused enewsletter 'Tourism Week', distributed each Friday.

Jersey Pass

Jersey Pass was promoted for the fifth consecutive year and proved to be popular with both consumers and the industry. The scheme is designed to support the Island's attractions in one comprehensive marketing scheme. The scheme supported 16 attractions in 2013 and created over 20,000 visits.

- Total Passes Sold: **3,285**
- Total Number of Visits: **20,547**
- Total Number of Pass Days: **15,203**
- Total Value of Passes Sold: **£161,596.00**
- Number of Visits per Day: **1.35**

Trade Support

Booking patterns show that 61% of visitors claim to have booked via a tour operator, the third successive year this volume has increased and a 13 point increase over the 3 year period. This demonstrates the reliance of the Jersey industry on trade partners to deliver customers.

It is therefore important that ongoing investment into trade support for tour operators be maintained. This support has seen significant investment into 50/50 marketing trade support, partnership advertising opportunities, as well as opportunities to attend exhibitions.

Jersey Tourism attended trade and consumer exhibitions throughout the year in the UK and Europe, including World Travel Market, ITB in Germany and Vakantiebeurs in Holland.

Jersey Tourism worked with hoteliers on jointly funded seasonal campaigns to drive incremental business during the summer and autumn, using direct mail, email, social media, press and online advertising.

Tactical price-led offers featured in national press classified sections, supported through 50/50 joint marketing funding with tour operators and through Jersey Tourism's partner marketing opportunities programme.

During the Rugby season, Jersey Tourism worked with the industry to support bookings for the home matches for the Jersey Rugby Club, featuring a dedicated page on jersey.com and with regional press ads in the regions from which visiting supporters were coming.

Towards the latter part of the year, Jersey Tourism worked with the industry to support Tennerfest, featuring a dedicated area on jersey.com, supported by Google and Bing PPC, Facebook ads, social media mentions and banners across jersey.com.

Jersey Tourism supported the promotion of La Fête dé Noué (Christmas Festival) in Guernsey, featuring a dedicated page on jersey.com, radio campaign, press ads and online banner ads, supported with a competition to win a 2 night break to Jersey from Guernsey. Partners included Condor Ferries and the Royal Yacht Hotel.

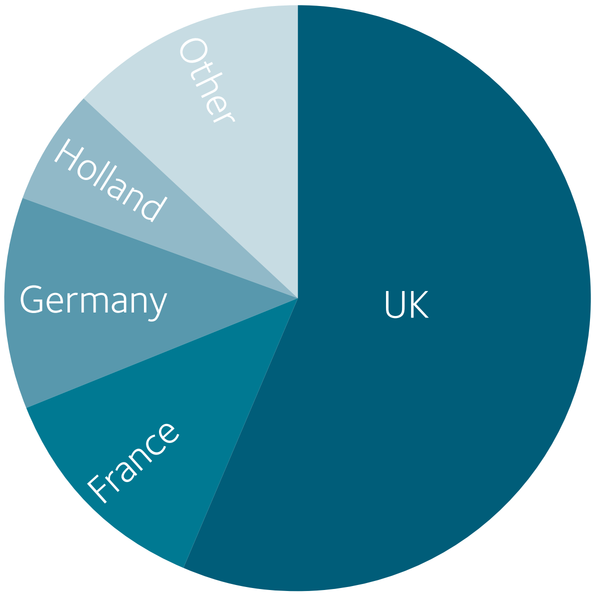
PR Activity

Overview

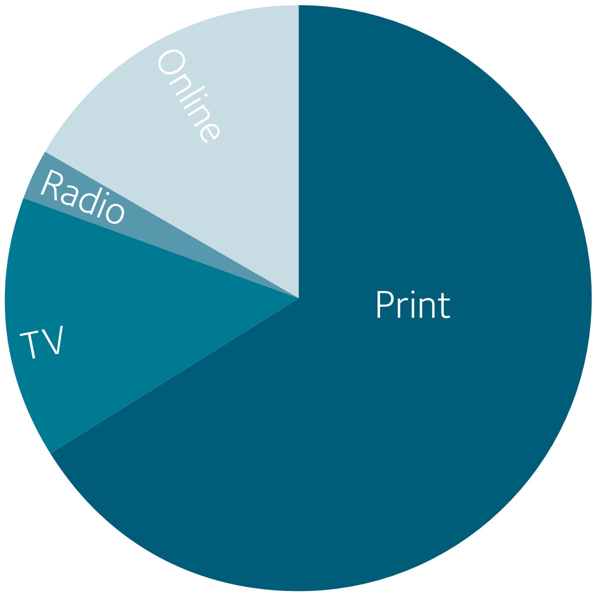
PR activity was conducted primarily in the key markets of the UK, France and Germany where PR agencies are employed. A new agency was appointed in the Netherlands in August and the Department worked alongside trade partners in other European markets and worldwide in conjunction with VisitBritain.

Media visits

A key element of the PR activity is to facilitate visiting media and supporting journalists with press packs, itineraries and, when appropriate, guiding services along with travel and accommodation support. Broadcast media are a priority and support was provided for 10 UK TV crews.



Total visits by country



Total visits by media type

Country	Print	TV	Radio	Online	**Total**
UK	79	10	6	23	**117**
France	18	6	0	2	**26**
Germany	17	6	0	1	**24**
Holland	11	0	0	2	**13**
Other worldwide*	12	9	0	6	**27**
Totals	**137**	**30**	**6**	**34**	**207**

* Other - includes visits from Austria, Belgium, Denmark, Switzerland, Portugal, China, Dubai and the USA.

Media coverage

Media coverage is achieved in conjunction with partner PR activities. The amount of coverage achieved is summarized as follows;

Country	Number of articles	Opportunities to see the articles
UK	600	576,816,637
France	82	161,394,124
Germany	669	242,700,000
Holland	13	2,417,426
Totals	**1364**	**662,968,993**

Broadcast coverage is a key component of the PR activity, with programmes aired in the UK, France and Germany, as follows:

UK Ten TV & radio programmes including:
- BBC One - Antiques Road Trip
- BBC Two - Coast, Hairy Bikers and Ice Age & Mammoth
- ITV 1 - Ade in Britain and Hungry Sailors
- Channel 4 – Time Team
- BBC Radio 4 – The Reunion

France Two TV programmes including:
- Thalassa /France 3 National on the sea
- ARTE TV German-French TV – Cuisine des terroirs (cooking programme)

Germany Two TV programmes including:
- NDR - Mare
- ARTE - Zu Tisch

French Market

The main objective was to build upon existing awareness of the destination and to give immediate and compelling reasons to visit, focusing on the British eccentricity which appeals to the French market.

The campaign concentrated on the key area of the West of France, but also supported the new direct air link from Paris. A unique creative concept was developed for the French market, with very strong partner support. The general situation in France was described as 'gloomy' and as a result, the creative was adapted to provide reasons to escape for 'absolutely fabulous weekends', providing a more immediate promise of a British escape.

The main target audience of couples aged 45+ with dual income, no children, and AB1's with high disposable income. According to research, key spending for this target group list travel and tourism as the number one main household spend. This group of young senior people generally like to travel in France or close to France.

Key to the communications strategy was a successful billboard campaign in the West of France, supplemented by a direct mail campaign. This was sent to a 3rd party database reaching 30,000 high-income people in the regions of Bretagne, Basse Normandie and Pays de la Loire.

A small press campaign was employed , buying full page space with high-end magazines Elle, Madame Figaro and Figaro Magazine in the Pays de la Loire, Bretagne, Normandie and IDF regions. IDF is considered the wealthiest and most populated of the twenty-seven administrative regions of France.

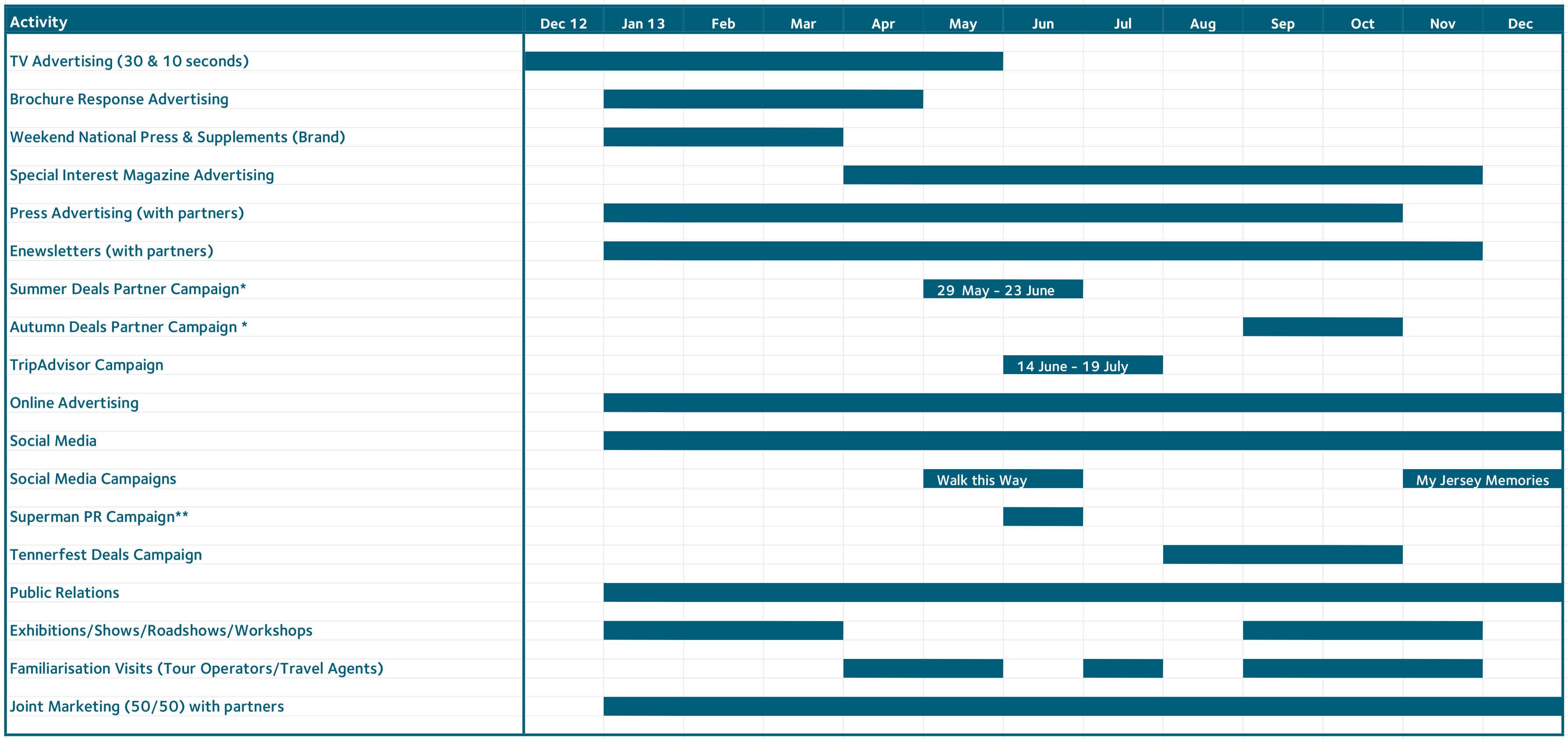
The digital effort in France utilised the 'i-love-jersey' campaign-led website, along with social media, SEO and PPC. This website links into Jersey.com/fr which contains more destination information. Social media is considered to be an effective way to interact and introduce all that Jersey has to offer and this will be developed further through the French Facebook community of over 13,500 followers.

Online UK Consumer Activity Jan – Dec 2013

Web	Social	Email	Device Used
1,219,154 Visits	33,735 Facebook Likes	119,000 Subscribers	806,269 web visits via desktop
2,266 Guestlink Bookings	7,400 Twitter Followers	2,031,004 Emails Delivered	280,091 web visits via tablet
66.63% New Visits	85,476 YouTube Minutes Watched	20.22* Average Click to Open Rate	125,198 web visits via mobile

* Click to open rate is the number of click-throughs as a percentage of the total number of recipients who opened it

JERSEY TOURISM 2013 UK CAMPAIGN ACTIVITY



* Joint campaign with Dolan, Morvan & Seymour Hotels
** Superman Premiere in Jersey on 14 June

Product Development and Events

Product Development Team

The Product Development team within Jersey Tourism 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 (including the local domestic economy).

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

There are currently four areas of work for the team;

1. General product development

2. Developing a programme of activity throughout the year

3. A Festival and events programme

4. Supporting external event organisers.

Subsidiary activity includes managing the content of www.jersey.com/events, animating ports of entry and other areas of the island and producing supporting documentation, print and promotional materials. The team currently provides the 'What's on' publication's diary content.

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 team has the objective of developing longer term 'products' to drive new business to the island. Examples include developing the island wide cycle network, amending marriage laws and the development of the 'active' product for example. A major area of development has been around the walking product. Initiatives such as the creation of the Channel Island Way, walking festivals and development of off and on-line walking routes and trails has contributed to a third of staying leisure visitors participating in scenic walks with a further 2.63% taking part in the guided walking programme.

In 2013 the team worked on an EU project 'Cycle West' with partners from the UK, Normandy and Brittany to develop the 'Tour de Manche' cycle routes from France to the UK via Jersey ('Petite Tour de Manche'). The aim of the project was to encourage staying leisure visitors to cycle around the south west of England, northern France and Jersey. The project included the development of a family route and a coastal cycling route which will be marketed on line (via Sustrans and British Cycling and tourism websites, France Velo Tourism etc.,) and in two newly commissioned guide books; one in French and one in English. Technical meetings took place in Roscoff, St Malo and Cherbourg with partners and technical and editorial visits were hosted on island.

The island wide cycle network way marking signs were updated and replaced (circa 700).

Annual Programmes of Activity

Each year the team develops a programme of activity 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 is the guided walking programme which delivers nearly 400 guided walks per annum. The walks focus on exposing visitors to our heritage and culture including farm tours, occupation memories, food trails and access to private gardens and homes.

To promote Genuine Jersey and other local products, 40+ local farm and craft markets have been staged at St Aubin and in the Royal Square. These provide animation, colour and activity and offer the visitor opportunities to purchase locally made goods. The markets also create reasons to visit St Helier. As at December 2013, 165 producers were members of Genuine Jersey.

The team manages the open garden programme, Howard Davis Park music programme and administers Jersey's entry into the Britain in Bloom event. In 2013 there were insufficient parish entries to compete nationally but both St Helier and St Brelade were entered into the winners' competition as a result of the 2012 entry. A workshop was staged with visiting UK experts to maintain momentum for Bloom groups and coordinators.

Jersey Comes to London

In 2013 the team staged a 'Jersey Comes to London' media event in the capital. This included an event at the headquarters of the Hearst building in Carnaby Street and at the headquarters of IPC magazines in Southwark.

Hearst publishes a variety of magazines including Country Living, House Beautiful, Cosmopolitan, Harper's Bazaar and Red. IPC magazines include Country Life, Woman's Weekly, and Woman's Own, Homes and Gardens and a wide range of specialist publications.

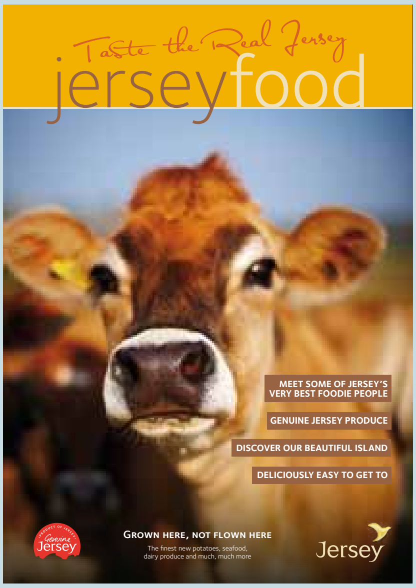
The event was designed to showcase Jersey's food offering, specifically the Island's seafood, dairy produce and Jersey Royal potatoes, and Genuine Jersey products including La Mare, Jersey Dairy, locally produced cider and Liberation ales and to promote the island as a visitor destination. Richard Allen, Michelin star chef from the Grand Hotel, Kazz Padidar, local forager and guide together with John Garton from the Genuine Jersey products Association attended. Over 30 editors came to the two sessions.

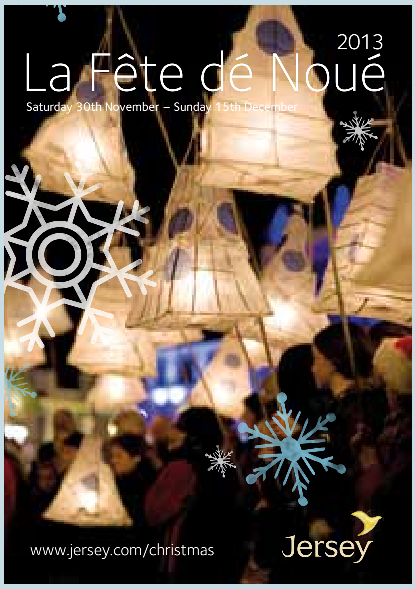
Festivals and Events

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 staged Liberation Day, the spring and autumn Walking Weeks, the Jersey Food festival, June in Bloom, the Black Butter event at the Elms, the Hidden Treasures heritage festival and La Fete de Noué. These festivals take place primarily in the shoulder months and are aimed at our target audience of 45+ higher spending couples.

Over 40 large events take place each year and the Product Development team will have contributed in some way, either through direct funding and collaboration (Battle, Air Display, Faisie d'Cidre) or through marketing and promotion. The team provides advice and guidance to event organisers, many of whom are volunteers.






Jersey
Jersey

Visitor Services

The Visitor Services team once again welcomed many thousands of visitors into the island, through the doors of the visitor centre at Liberation Place. While the season started with high numbers of French day trippers, the weather across the UK delayed the start of the number of UK visitors to the centre. These figures showed an approximate reduction of approx. 1.5%

However the staff in centre were fully occupied by assisting the marketing team at various well attended exhibitions in Europe. Ie ITB in Berlin and Vakantiebeurs in Holland. At both of these venues, the wealth of language skills and knowledge was much appreciated by the thousands of attendees. One of the team was also asked to join two others from Tourism to act as a Delegate Liaison Officer at the prestigious British & Irish Council held at the L'Horizon in November. The island was also represented at the Condor open day held in Weymouth to mark the reopening of this important port. This event was attended by just under 3,000 visitors in the space of a matter of hours showing the importance of this transport link.

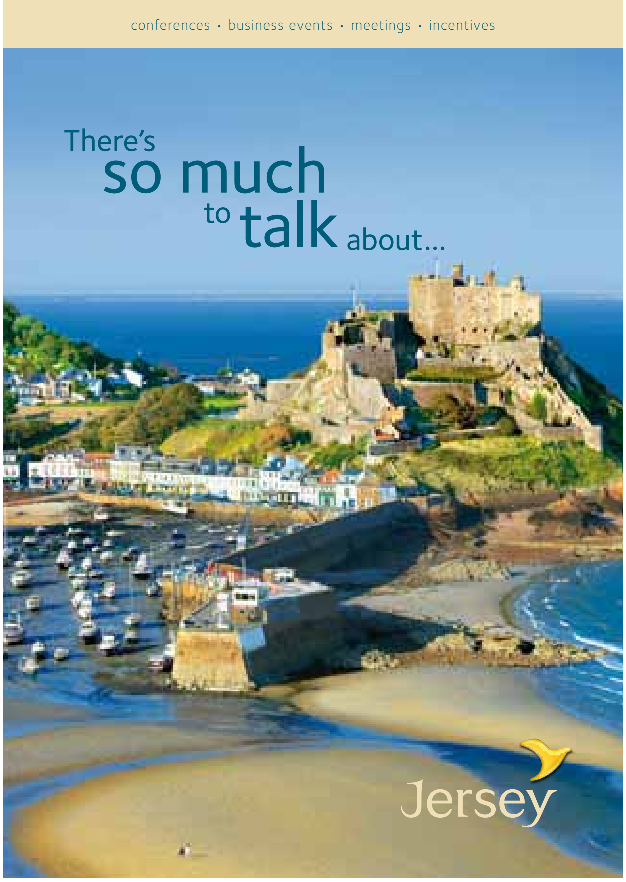
With the slight downturn in total visitor numbers to the centre the retail figures remained strong at £150k net income with an average spend of £2.05 and on line shopping maintained remained steady at £6k due in part to the agreement with one publishing house to act as their distribution and despatch dept for the Jersey calendar.

2013 saw the first full on line booking system for Battle of Flowers ticket sales. Jersey Tourism staff trained the BOF part time team members for this major event and oversaw the operation of the sales outlet in a remote office location on the Esplanade. Advance ticket sales were up on previous years and the Day Parade was a sell out due in part to the ease of booking.

VISITOR SERVICES WELCOMED UP TO

2000

VISITORS PER DAY IN HIGH SEASON



Jersey Conference Bureau

The value of business events and visiting delegates increased to £3.5 million from £3.2 million in 2012.

Only the Partners of the Conference Bureau submit business events returns to Island Ark and the number of bed nights, delegates numbers and spend is calculated from these returns.

The number of actual visiting delegates dropped slightly from 6,332 to 5,964 however they stayed on average longer, 3.66 nights, than the previous year (3.44 nights) and bed nights increased marginally from 21,823 to 21,831.

3,444 delegates attended Association events and 2,520 delegates attended Corporate events.

Investment through the Bureau from the private sector was £50,817 against a budget of £100,000 and the Bureau received a total of £220,500 as budgeted from Jersey Tourism/EDD.

Further information can be obtained from the Bureau's 2013 Annual Review which can be obtained by e-mailing hamish@jersey.com or by contacting Hamish Reid on 07787 503130.

Financial Report

	2013 Actual £000	2012 Actual £000
Corporate		
Strategy and Policy	468	638
Research and Planning	92	99
Communications		
Advertising and Media	2,267	2,014
Distribution	439	540
Marketing Services	166	211
Product Development	705	740
Market Development		
Trade Relations	374	407
Consumer and Media Relations	1,334	1,386
Visitor Services	278	320
Net Revenue Expenditure	**£ 6,123**	**£6,355**

Note: The above figures include direct salaries and an allocation of Economic Development Department (EDD) overheads (£365k).

Key Financial Results
Total revenue expenditure for 2012 was £6,124 a decrease of £231k (-3.63%) compared with 2012

The Tourism Department received additional carry forward funding of £271k in 2013.

Corporate expenditure decreased by £177k (-24.0%)
The decrease in Corporate Strategy and Policy expenditure was mainly due to a decrease in route development (£195k).

Communications expenditure increased by £72k (0.2%)
There was an increase in marketing expenditure in the German Market

Market Development expenditure decreased by £127k (-6.0%)
There was a slight reduction in Consumer & Media Relations for 2013 (85k) mainly due to a re-prioritisation and more favourable terms and a slight reduction in Visitor Services staff costs for 2013 (42k.)

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, 2009 and again throughout 2012.

In years when a Passenger Exit Survey is not undertaken, estimates are made in the intervening years based upon the previous survey's results. These are then revised when new survey data becomes available.

The most recent passenger exit survey was undertaken throughout 2012 and covered over 137,000 departing passengers (nearly 13% of total departing passengers by air and sea). The survey data provides a passenger breakdown on each route as follows:

- Resident, visitor, transit 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 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 across the whole year. A larger coverage of passengers is achieved in the Jersey survey, thus making the results more statistically reliable.

2010 and 2011 visitor volume figures have been updated based upon results from the 2009 and 2012 Exit Surveys. The tourism volume estimates for 2013 are based upon the results from the 2012 Exit Survey, as well as additional information from other sources.

Visitor expenditure

Visitor expenditure estimates are based upon the most recent visitor expenditure survey undertaken throughout 2012. Previous estimates for 2008 to 2011 were based upon the 2007 Visitor Expenditure Survey and applying Jersey's RPI figures for the ensuing years. These estimates have now been updated based upon results from the more recent data from the 2012 Visitor Expenditure Survey which covered 10,900 departing visitors from 5,045 detailed interviews.

2013 visitor expenditure estimates are also based upon the 2012 Visitor Expenditure Survey, using Jersey's September 2013 RPI figures to update the figures from that survey.

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

SUMMARY OF TOPLINE FIGURES 2009 - 2013

	2009 Jersey Travel Survey 2009	2010	2011	2012 Jersey Travel Survey 2012	2013	2013 vs. 2012
On-Island Visitor Expenditure	£221 million	£225 million	£231 million	£227 million	£228 million	0.2%
On-Island Visitor Expenditure Reflated to 2013 levels	£247 million	£248 million	£241 million	£230 million	£228 million	-1.2%
Total Tourism Visitor Volume	680,800	690,100	699,900	688,300	681,900	-0.9%
Total bed nights sold over year	1.77 million	1.73 million	1.77 million	1.68 million	1.68 million	-0.3%
Total room nights sold over year	0.86 million	0.90 million	0.93 million	0.90 million	0.90 million	-0.6%
Staying Leisure Visitor Volume	338,500	335,500	339,700	333,200	325,800	-2.2%
Staying Leisure Visitor Average Stay	4.4	4.3	4.3	4.3	4.3	0.5%
Staying Leisure Visitor On-Island Expenditure	£148 million	£151 million	£159 million	£159 million	£157 million	-1.1%
Staying Leisure Visitor On-Island Expenditure Reflated to 2013 levels	£166 million	£166 million	£165 million	£161 million	£157 million	-2.4%
Staying Business Visitor Volume	57,700	66,100	66,500	67,100	69,700	3.9%
Staying Business Visitor Average Stay	2.3	2.4	2.3	2.2	2.2	1.4%
Staying Business Visitor On-Island Expenditure	£20 million	£24 million	£23 million	£23 million	£25 million	6.3%
Staying Business Visitor On-Island Expenditure Reflated to 2013 levels	£23 million	£27 million	£24 million	£24 million	£25 million	4.8%
Staying Conference Visitor Volume	9,200	9,200	9,300	6,300	6,000	-5.8%
Staying Conference Visitor Average Stay	4.1	3.7	3.6	3.5	3.7	6.1%
Staying Conference Visitor On-Island Expenditure	£5.4 million	£5.3 million	£5.2 million	£3.2 million	£3.5 million	7.2%
Staying Conference Visitor On-Island Expenditure Reflated to 2013 levels	£6.1 million	£5.8 million	£5.4 million	£3.3 million	£3.5 million	5.7%
Day Trip Visitor Volume	134,500	140,100	145,900	149,300	149,600	0.3%
Day Trip Visitor On-Island Expenditure	£7.4 million	£7.9 million	£8.5 million	£8.9 million	£9.1 million	2.1%
Day Trip Visitor On-Island Expenditure Reflated to 2013 levels	£8.3 million	£8.7 million	£8.9 million	£9.0 million	£9.1 million	0.7%
Hospitality sector jobs [1]	6,060	6,040	6,320	6,330	6,540	3.3%
Registered accommodation establishments	142	141	143	140	141	0.7%
Registered tourism bed spaces [2]	12,000	11,900	12,000	11,800	11,700	-0.5%
Total bed nights available over year	3,345,500	3,265,400	3,284,100	3,322,000	3,379,000	1.7%
Average yearly bed space occupancy	53%	53%	54%	51%	50%	-2.0%
Average yearly room space occupancy	58%	61%	62%	60%	60%	-0.9%
August bed space occupancy	81%	83%	82%	78%	79%	0.5%
August room space occupancy	82%	91%	88%	85%	87%	2.4%
Total booking revenue generated by JerseyLink	£1.1 million	£1.0 million	£1.1 million	£0.8 million	£0.8 million	-3.8%
Total visits to www.jersey.com [3]	1,287,700	1,451,900	2,025,700	2,249,300	2,275,400	1.2%

For reflating previous years, Jersey's September RPI (X) figures have been used.

[1] 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 2013 (Statistics Unit). The hospitality sector alone does not constitute the full impact of tourism upon employment in Jersey.

[2] Includes hotels, guest houses, self catering, hostels and campsites registered with Jersey Tourism.

[3] Source: Google Analytics.

Jersey Tourism 2013

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 and Notes).

Visitor expenditure estimates refer to direct visitor spend whilst in Jersey and are based upon results from the 2012 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.

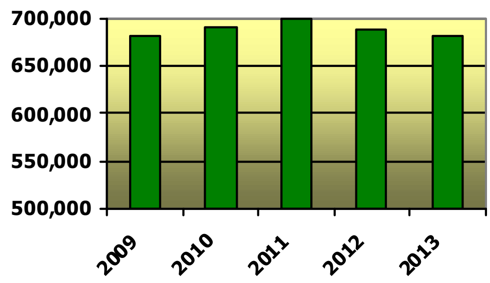
The following summary of 2013 results emphasises the importance and impact of the tourism industry in Jersey.

- 681,900 Visitors.
- 325,750 Visitors staying in paid accommodation for leisure purposes.
- 72% of staying leisure visitors were from the UK, representing 79% of total staying leisure visitor bed nights sold.
- Almost 1.7 Million overnight stays (bed nights sold) in paid accommodation (excluding visiting yachts).
- £228 million estimated on-island visitor spend.
- £117 million estimated visitor spend on accommodation.

1.2 Total Visitor estimates

Figure 1 below shows that the number of visitors decreased by 0.9% from 688,300 in 2012 to 681,900 in 2013, following a decrease of 1.7% between 2011 and 2012.

Figure 1 Total visitor volume 2009-2013

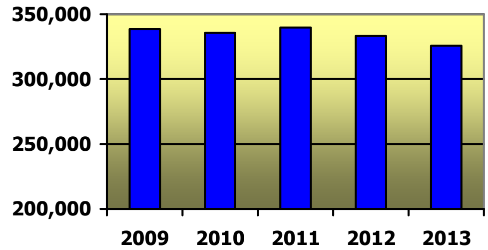


*A full breakdown of total visitor numbers can be found in **Appendix 1**.*

1.3 Staying Leisure Visitors

Figure 2 below shows how total staying leisure visitor volume decreased by 2.2% from 333,200 in 2012 to 325,750 in 2013, following a decrease of 1.9% between 2012 and 2011.

Figure 2 Staying leisure visitors 2009-2013



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

1.4 Visitors Staying with Friends and Relatives (VFR)

The number of visitors staying with friends and relatives decreased by 0.7% from 100,600 in 2012 to 99,800 in 2013. 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 2012 Travel Survey it is estimated that 88% 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 2013

	Volume	%
UK	**83,700**	**84%**
Ireland	**3,300**	**3%**
France	**3,200**	**3%**
Other CI	**2,100**	**2%**
Portugal	**1,000**	**1%**
Other	**6,700**	**7%**

Those staying with friends and relatives spend slightly longer in Jersey than visitors in paid accommodation, with an average length of stay of 6.0 nights. The VFR market therefore accounted for 597,000 overnight stays in Jersey in 2013.

1.5 Language Students

Visiting language student numbers increased by 3.9% from 3,350 in 2012 to 3,480 in 2013.

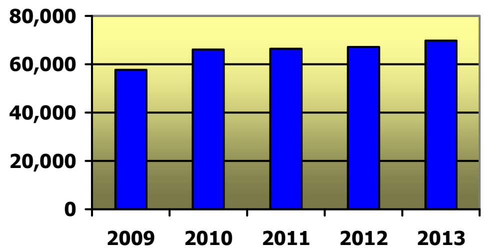
Language students in 2013 are estimated to have stayed in Jersey for an average of 12.5 nights, with the total market accounting for 43,600 nights in Jersey. The majority of students stay with host families which puts a constraint upon the maximum size the language student market can achieve.

1.6 Business Visitors

The business market is estimated to have increased by 2.6% from 109,800 in 2012 to 112,700 in 2013.

In 2013 the number of staying (one or more nights) business visitors increased by 3.9% to 69,750, with business day visits increasing by 0.6% to 42,900.

Figure 3 Staying business visitors 2009-2013



The increase in staying business visitor volume, coupled with a small increase in average stay accounted for 155,500 bed nights sold, 5.3% more than in 2012.

Table 2 Staying business visitor volumes by market 2013

	Volume	%
UK	**56,500**	**81%**
Other CI	**5,100**	**7%**
France	**1,600**	**2%**
Ireland	**700**	**1%**
Switzerland	**800**	**1%**
Other	**5,100**	**7%**

1.7 Visiting Conference Delegates

Residential conference delegate numbers decreased by 5.8% from 6,330 in 2012 to 5,960.

The number of conferences/events decreased by 22 from 257 in 2012 to 235 in 2013. The number of Corporate delegates was 2,500, while the number of Association delegates was 3,460.

The number of bed nights sold remained at the same level as 2012 at 21,800.

Further details can be obtained from Hamish Reid at the Jersey Conference Bureau. www.jerseyconferences.co.uk

1.8 Visiting Yachtsman

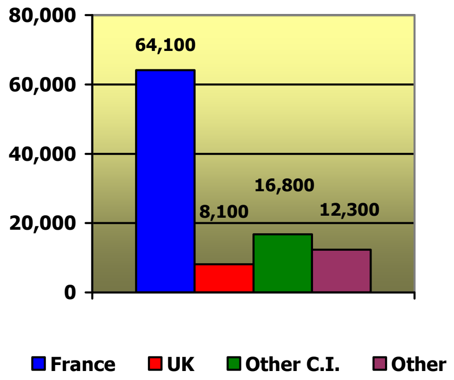
The number of visiting yachtsmen decreased by 3.3% from 20,500 in 2012 to 19,850 in 2013, staying an average of 2.2 nights, the same as in 2012.

Further details can be obtained from Jersey Harbours. www.portofjersey.je

1.9 Leisure Day Trips

Leisure day trip visits increased by 0.1% from 101,200 in 2012 to 101,300 in 2013.

Figure 4
Breakdown of leisure day trip visitors by market



Source: 2012 Travel Survey

1.10 Visitor Expenditure Estimates

Total on-Island expenditure in 2013 is estimated at £228 million.

Tourism expenditure in Jersey in 2013 has increased by 0.2% compared to 2012.

Table 3 shows a breakdown of estimated on-Island visitor expenditure by visitor type 2012 vs. 2013.

Table 3 Total visitor spend 2012 vs. 2013

	2012 value of market 000's	2013 value of market 000's	% change
Staying Leisure Visitors	£158,892	£157,201	-1.1%
Visiting friends/relatives	£22,366	£22,713	1.5%
Language students	£3,186	£3,316	4.1%
Leisure day visitors	£5,035	£5,125	1.8%
Visiting yachtsmen	£2,210	£2,139	-3.2%
Business visitors	£27,110	£28,688	5.8%
Conference delegates	£3,222	£3,454	7.2%
Other visitors	£5,213	£5,106	-2.1%
Total visitor spend	**£227,233**	**£227,741**	**0.2%**

N.B. 2012 figures are not reflated.

Table 4 shows a breakdown of estimated on-Island visitor expenditure per visitor by visitor type 2012 vs. 2013.

Table 4 Spend per Visitor 2012 vs. 2013

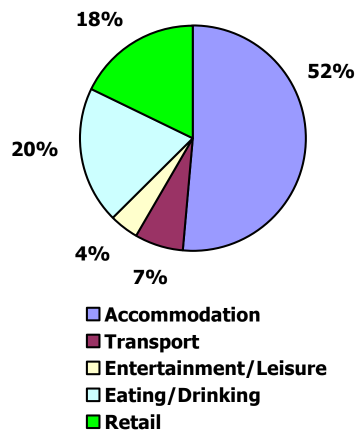
	2012 spend per visitor	2013 spend per visitor	% change
Staying Leisure Visitors	£477	£483	1.2%
Visiting friends/relatives	£222	£228	2.3%
Language students	£951	£953	0.2%
Leisure day visitors	£50	£51	1.7%
Visiting yachtsmen	£108	£108	0.1%
Business visitors	£247	£255	3.1%
Conference delegates	£509	£579	13.8%
Other visitors	£393	£392	-0.3%
Average spend per visitor	**£330**	**£334**	**1.2%**

N.B. Figures have been rounded.
N.B. 2012 figures are not reflated.

Breakdown of on-Island visitor spend 2013

The 2012 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 2013



Source: 2012 Visitor Expenditure Survey

The above shows that over 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.). 20% of visitor expenditure is spent in restaurants, pubs and cafés, 7% on on-Island transport, 4% on entertainment and leisure, and 18% on miscellaneous items which are mainly retail.

Visitor expenditure estimates are based upon the most recent visitor expenditure survey undertaken in 2012 with figures reflated using the September 2013 RPI figures.

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

1999	**£5.9 million**
2000	**£5.2 million**
2001	**£4.9 million**
2002	**£5.0 million**
2003	**£5.0 million**
2004	**£5.9 million**
2005	**£5.9 million**
2006	**£5.3 million**
2007	**£5.5 million**

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 reflated for direct comparison with 2007.

No data has been provided subsequent to 2007.

2. Profile of Staying Leisure Visitors

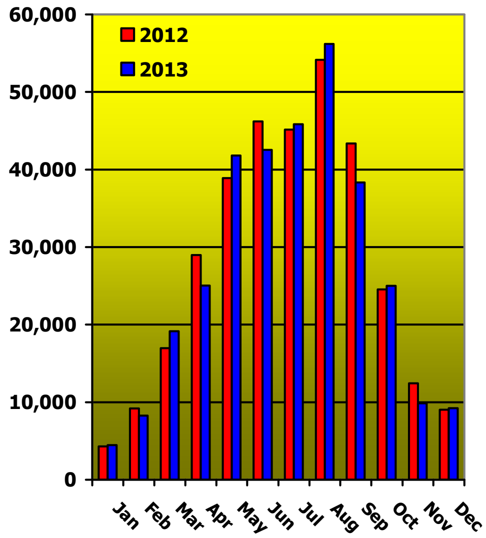
The following tables show **staying leisure visitor** trends, with the data derived from those visitors staying in registered accommodation that filled in visitor registration cards and stated that their main purpose of visit was "holiday" or "sport".

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 6 shows that 2013 started well, followed by a weaker performance in April, but then an equivalent increase in May. The main falls in 2013 were in the shoulder months of June and September, as well as November. The peak summer months of July and August both showed increases over 2012.

Figure 6 Staying leisure visitor arrivals by month 2012 and 2013.



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 - 2013 party composition.

	Adults (over 16)	Children (under 16)	Total Visitors
UK	218,200	15,500	233,700
Ireland	2,800	300	3,100
Other CI	18,700	2,000	20,700
France	33,000	4,500	37,500
Germany	13,700	500	14,200
Benelux	3,400	200	3,600
Other	12,300	700	13,000
Total	**302,100**	**23,700**	**325,800**

In 2013, children accounted for 7% of total staying leisure visitors, a slightly lower percentage than the 8% in 2012.

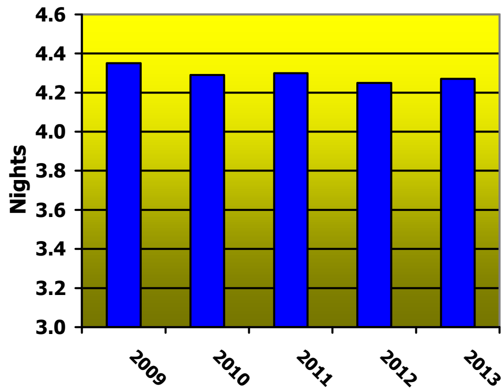
2.3 Average Length of Stay

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 2009 to 2013. Average stay has remained steady at around 4.3 nights over the last 5 years.

Figure 7 Staying leisure visitors – average stay 2009-2013



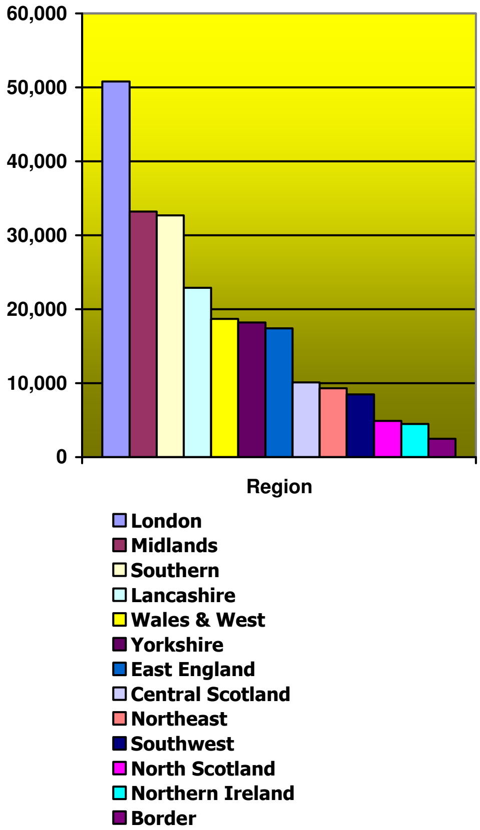
Source: Visitor registration cards

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 2013



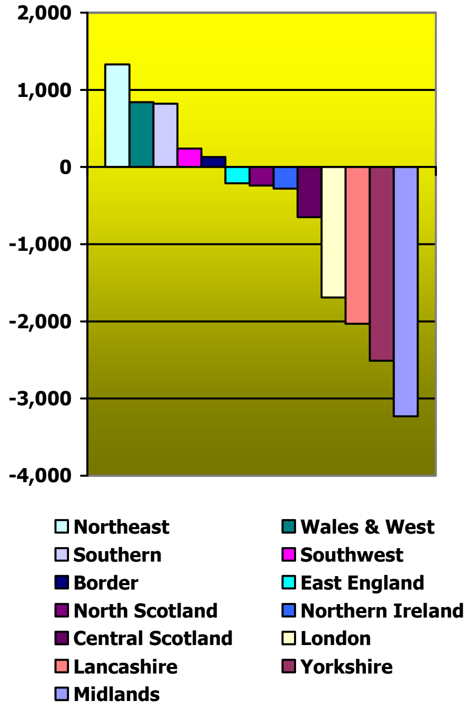
There have been some significant changes in the regional distribution of visitors by ISBA region between 2009 and 2013. These changes are partly reflective of the changes to capacity on certain routes and of some new routes being introduced, as well as discontinued routes.

Table 7 and Figure 9 opposite show the changes in volumes of visitors by ISBA region between 2013 and 2012.

Table 7 Visitor volume changes 2013 vs. 2012

Northeast	1,330
Wales & West	840
Southern	820
Southwest	240
Border	130
East England	-210
North Scotland	-240
Northern Ireland	-280
Central Scotland	-650
London	-1,690
Lancashire	-2,030
Yorkshire	-2,510
Midlands	-3,230

Figure 9 Visitor volume changes 2013 vs. 2012



Compared to the UK's population distribution, Jersey again had highest penetration in 2013 in the Southern and Southwest regions, followed by the London and East England regions.

In 2013, 50% of Jersey's UK visitors AGAIN 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

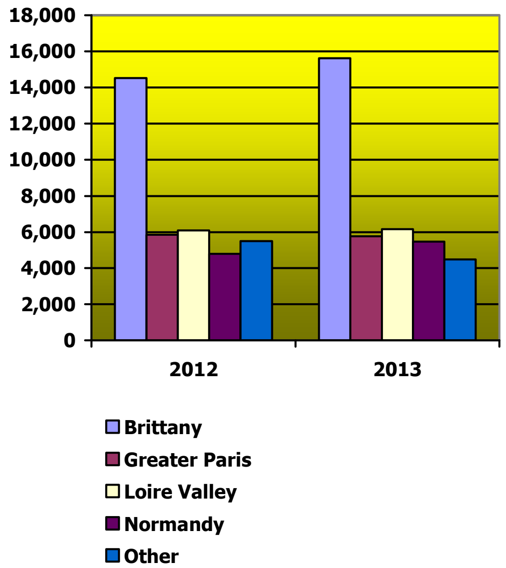
The first two digits of French postcodes from returned visitor registration cards have also been captured so that a continuous monitor of visitors from French Départements has been possible. Départements are grouped into French regions.

Table 8 and Figure 10 show the distribution of French staying leisure visitors between 2012 and 2013.

Table 8 French visitors by region 2013 vs. 2012

	2012	2013	Change 13/12	Change 13/12
Brittany	14,520	15,620	8%	1,100
Greater Paris	5,860	5,770	-2%	-90
Normandy	4,780	5,470	14%	690
Loire Valley	6,100	6,170	1%	70
South East	1,230	1,000	-19%	-230
South West	940	920	-2%	-20
Other	3,330	2,560	-23%	-770
Total	36,760	37,510	2%	750

Figure 10 French visitors by region 2013 vs. 2012



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. The groups were completely revised in 2011, and these new groups have been used since then.

Table 9 shows the geo-demographic profile of visitors to Jersey in 2013. 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 2013

MOSAIC Group	% UK Households	Jersey Visitors	Index 2012
Alpha Territory	3.5%	7.1%	**2.0**
Professional Rewards	8.2%	17.9%	**2.2**
Rural Solitude	4.4%	6.6%	**1.5**
Small Town Diversity	8.8%	11.6%	**1.3**
Active Retirement	4.4%	5.6%	**1.3**
Suburban Mindsets	11.2%	13.7%	**1.2**
Careers and Kids	5.8%	7.4%	**1.3**
New Homemakers	5.9%	2.9%	**0.5**
Ex-Council Community	8.7%	5.2%	**0.6**
Claimant Cultures	5.2%	1.6%	**0.3**
Upper Floor Living	5.2%	1.5%	**0.3**
Elderly Needs	6.0%	2.5%	**0.4**
Industrial Heritage	7.4%	6.9%	**0.9**
Terrace Melting Pot	7.0%	2.7%	**0.4**
Liberal Opinions	8.5%	6.9%	**0.8**

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 in the appendices are that:

- The average length of stay remained constant at 4.3 between 2012 and 2013. The average stay for UK visitors remained at the same level of 4.7 nights in 2013. French stay has fallen to an average of 2.0 nights and German stay has fallen to 6.1 nights.

- The percentage of visitors booking their holiday through a tour operator was 61% in 2013; representing an increase from 55% in 2011, and 59% in 2012.

- The percentage of first time visitors in 2013 remained the same at 47%. This figure has been fairly consistent over the past 5 years.

- In 2013 the booking lead time has remained at a very similar level to 2012 and 2011. 33% of visitors booked their accommodation less than one month before arrival, 36% between 1 and 3 months before and 31% over 3 months in advance.

- Between 2011 and 2012 the percentage of staying leisure visitors travelling by air to Jersey increased from 67% to 71%. In 2013, this has fallen back again, with 69% of staying leisure visitors travelling by air to Jersey.

- The average adult age continues to climb very gradually and was up by one year to 55 in 2013. UK visitors at 57 are generally older than most European visitors.

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

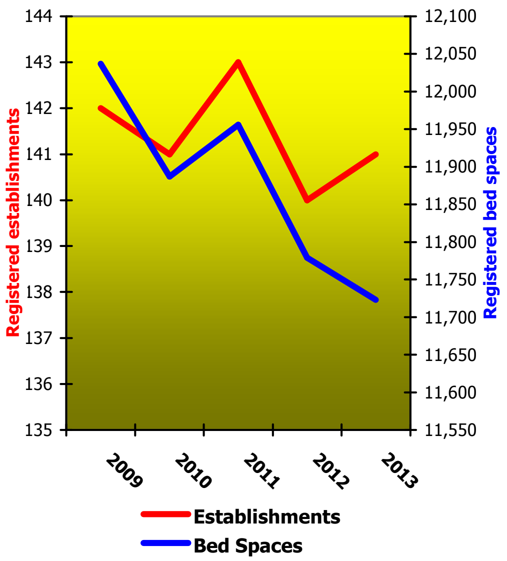
3. Registered Bed Stock

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 number of registered accommodation establishments has remained steady at around 140, while the number of available bed spaces has fallen very gradually.

Figure 11 Registered establishments and bed spaces 2009-2013



In 2013, Jersey had 141 registered establishments, representing almost just over 11,700 tourist bed spaces. Hotels accounted for 77% of the total bed stock in 2013.

Compared to 2012, the number of registered bed spaces increased for campsites, youth hostels and self catering, but fell for hotels and guest houses.

The largest fall in bed spaces over the past 5 years has been from campsites. There have been increases in the number of self catering and youth hostel bed spaces, while the number of hotel and guest house bed spaces has remained steady. The average number of bed spaces per establishment was 83 in 2013.

Figure 12
Distribution of bed spaces 2009-2013

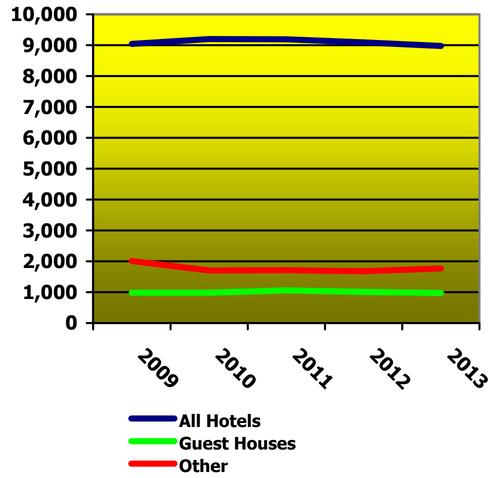
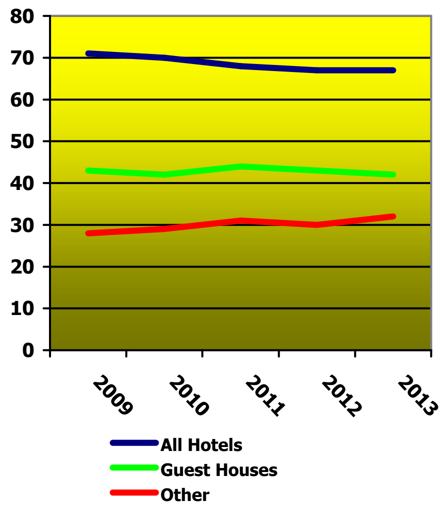


Figure 13
Distribution of establishments 2009-2013



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

4. Accommodation Performance Indicators

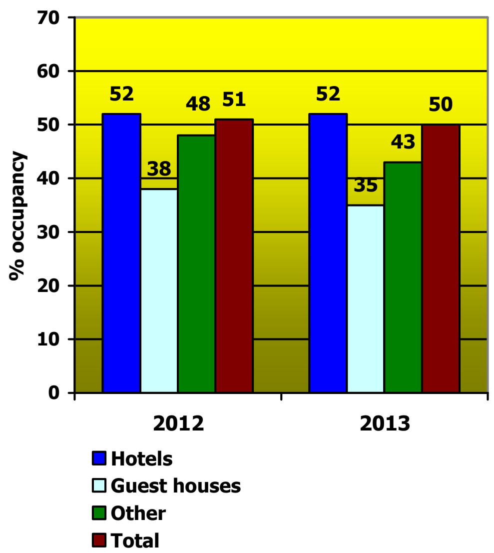
This section shows the performance in terms of bed and room nights sold, and occupancy levels achieved, in the accommodation sector.

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 2013 vs. 2012.

Figure 14 Bed space occupancy 2013 vs.2012

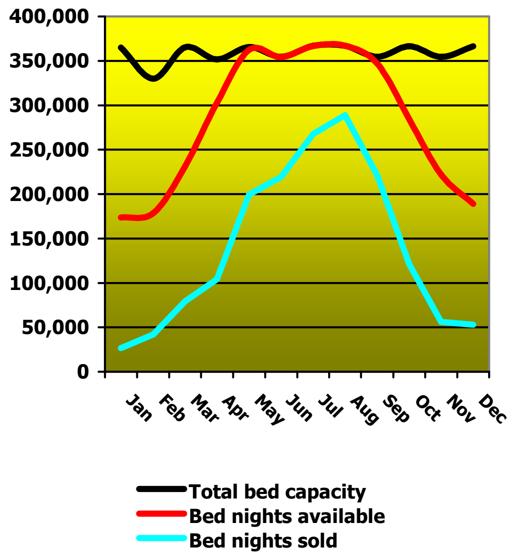


In 2013, total bed space occupancy averaged 50%, compared to 51% in 2012. Bed nights sold in all accommodation decreased by just 0.3% to 1,678,800 while total bed night availability increased by 1.7% to 3,378,700 primarily due to more bed capacity in non-serviced accommodation.

4.1.1 Monthly Bed Occupancy

Figure 15 illustrates the seasonality of tourism in terms of total bed capacity, the number of beds that are available (open) for tourism purposes and number of bed nights sold across the year.

Figure 15 Bed spaces – available and sold

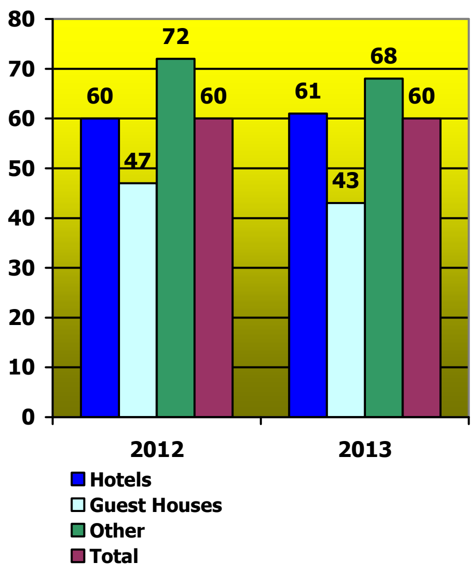


4.2 Room Occupancy

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 2013 vs. 2012.

Figure 16 Room space occupancy 2013 vs. 2012



In 2013 total room occupancy averaged 60%; the same figure as in 2012. Rooms sold in all accommodation decreased by 0.6% to 897,000 while total rooms available increased by 0.3% to 1,501,800.

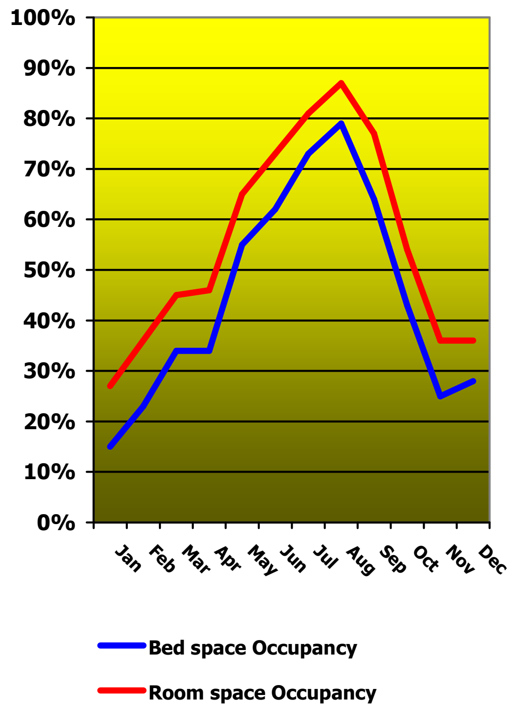
N.b. Room occupancy excludes campsites, which are included in bed space occupancy.

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

Figure 17 Bed and room occupancy 2013



5.1 JerseyLink Bookings

JerseyLink is a central accommodation reservations system set up by Jersey Tourism to enable industry partners to sell any spare room capacity they might have. Circa. 85% of Jersey's registered bed stock is connected to the system.

Table 10 Jersey Link bookings 2012 vs. 2013

	2012	2013	13 vs. 12
Number of bookings	2,900	2,600	-9%
Number of bed nights	20,800	20,500	-2%
Revenue	£830,600	£798,700	-4%

The above table shows a 9% decrease in bookings, resulting in a decrease of 2% in bed nights sold through the system in 2013. Revenue in 2013 decreased by 4% to £798,700 compared to 2012, producing an average per person per night rate of £38.98, a decrease on 2012 of £0.91 (-2.3%).

JerseyLink bookings accounted for 1.22% of total bed nights sold in 2013, compared to 1.23% in 2012.

NB: In October 2011, the software powering the JerseyLink system was replaced. Following an extensive tender process, the legacy software provided by Chauntry Corporation was replaced with a web based solution provided by NVG. The accommodation sector received training to aid the transition.

Figure 18
JerseyLink Bookings Revenue 2009 – 2013

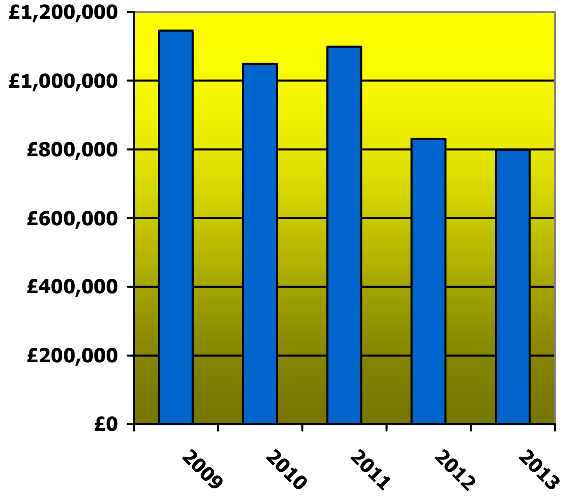
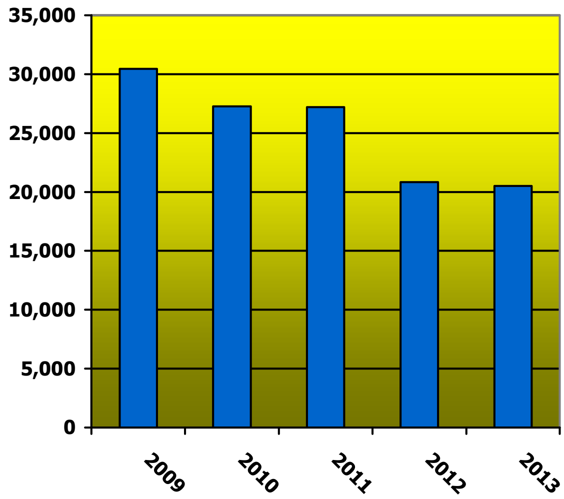


Figure 19
JerseyLink Bednights Sold 2009 – 2013



More detailed data can be found in ***Appendix 12.***

6. Internet Usage

Staying Leisure Visitor Surveys over the past decade have shown a dramatic rise in the number of staying leisure visitors to Jersey who have internet access and use it for holiday information and bookings.

Significant increases in access and use for holiday information have been recorded in all countries over many years. 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 (Source: Staying Leisure Visitor Surveys). However, Jersey's main markets of the UK, France and Germany all have very high levels of internet penetration, with each country having in excess of 80% of their population using the internet.

6.1 www.jersey.com

Jersey.com has been in existence as the official Jersey Tourism website since March 1999, and the current version of the site was launched in April 2008. Site content is published in English, French and German.

The website offers a number of tools including Accommodation Reservations, Festival & Event search, Flight search, Weather information, Brochure Request facility, Restaurant listings, Attractions, Activities and a wealth of content about what Jersey has to offer visitors and to enable holiday planning.

In 2013, there were nearly 2.3 million visits to the site, compared to 2.2 million in 2012. 54% of site traffic in 2013 came from the UK, followed by 11% from France, and the Accommodation Search facility was the most visited area of the website.

Source: Google Analytics

6.2 Website Usage

Table 11 Website Visits, 2011 - 2013

	2011	2012	2013
Visits	2,025,739	2,249,266	2,275,371
Unique Visitors	1,424,113	1,494,777	1,502,351

Visits to Jersey.com by Market, 2011 - 2013

	2011	2012	2013
UK	1,061,659	1,210,474	1,219,154
France	286,356	282,886	256,360
Germany	91,846	89,798	94,565

Source: Google Analytics

6.3 www.I-love-Jersey.fr

I-love-Jersey.fr is primarily used in the French market and in 2013 there were 46,800 visits to the site and 112,000 page views.

There were 8,620 fans, with a typical profile being 38 year old females living in Paris.

Source: LMY&R

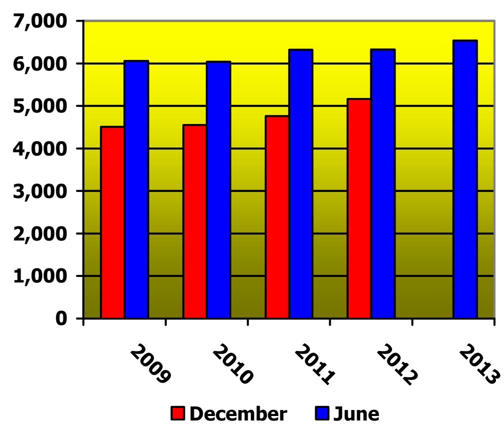
7. Employment in the Hospitality Sector

The figures within this section are provided by the States Statistics Unit 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 2009 and 2013. There has been increased total employment in the sector over the past 5 years and June 2013 saw an increase of over 200 staff employed compared to June 2012.

Figure 20 Total staff employed in the hospitality sector 2009 – 2013



Source: States Statistics Unit

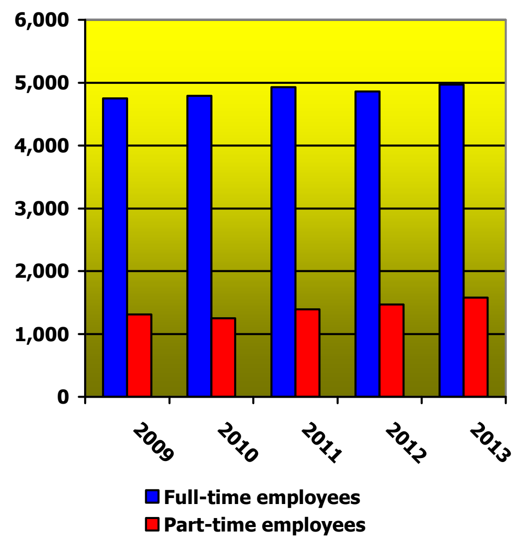
The difference between the number of staff employed in June 2013 and December 2012, some 1,380, would indicate the seasonal nature of tourism employment. The equivalent figure in 2012 was 1,570.

Measured against staff employed in all sectors, the percentage attributable to the hospitality sector in the June reports has risen from 12% in 2009 to 13% in 2013. In line with the similar numbers of accommodation providers over 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 the trends in full-time and part-time employment since 2009. In 2013, both full-time and part-time staff numbers increased compared to 2012.

In 2013, full-time employees accounted for 76% of all those employed in hotels, restaurants and bars, compared to 78% in 2009.

Figure 21 Full-time vs. part-time posts (June) 2009 – 2013



Source: States Statistics Unit

For more detailed information please visit The Statistics Unit's website at www.gov.je/statistics

8. Passenger Arrivals

In 2013, passenger arrivals through Jersey's airport decreased by 7,200 (-1.0%) and passengers through Jersey's harbour terminals increased by 10,100 (2.8%).

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

Figure 22 Total passenger arrivals 2009 – 2013

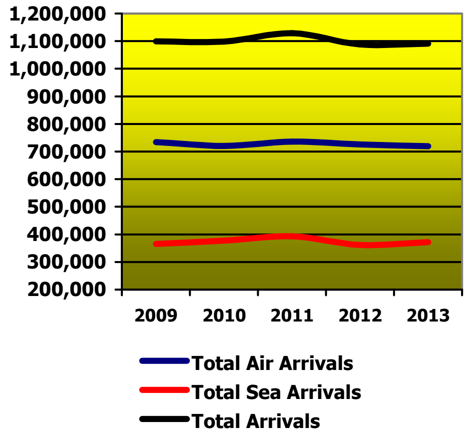
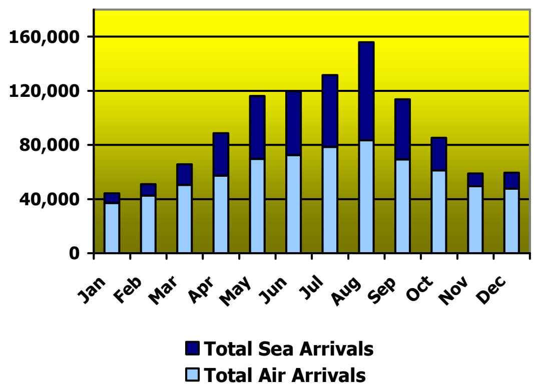


Figure 23 shows arrivals by month during 2013. The pattern of higher arrivals during the summer months reflects the seasonality of the "tourist" season.

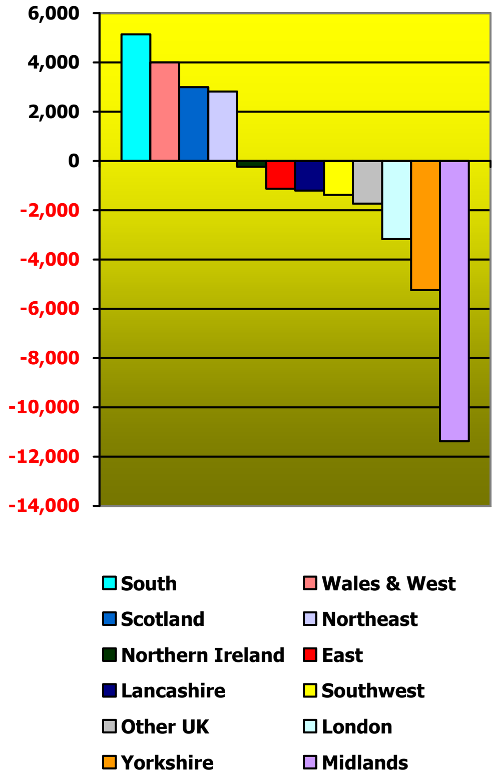
Figure 23
Total air & sea arrivals by month for 2013



As in recent years, 2013 again saw some significant changes in arrivals patterns.

4 UK regions showed increases in passenger arrivals. The highest increase was from the South region (+5,100), mainly due to increases in passenger numbers on the Southampton route. There was also an increase of 4,000 passengers from Wales & West due to increases on both the Bristol and Cardiff routes. The main regional falls in passenger numbers have been from Yorkshire (-5,200) and the Midlands (-11,400), mainly due to falls on the East Midlands route. In 2012, the Midlands also saw the largest fall in passenger volume.

Figure 24 Changes in UK air arrivals by region 2013 vs. 2012



For more detailed arrivals data please refer to ***Appendices 14.1 to 14.4.***

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, 2009 and 2012 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 2012 to measure visitor volume in order to update data gathered from the most recent previous survey undertaken in 2009. Similar in methodology to the UK International Passenger Survey and many other exit surveys carried out internationally, throughout 2012, 61,600 departing passengers, representing 137,000 (12.6%) 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.

Also throughout 2012, a smaller sample of 5,045 representing 10,900 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 2012. 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.

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 Jersey Tourism. 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 2013 Annual Report.

Jersey Conference Bureau
www.jerseyconferences.co.uk

Jersey Met Office
www.jerseymet.gov.je

Jersey Harbours
www.portofjersey.je

Statistics Unit
www.gov.je/Statistics

For other statistics and research please visit www.jersey.com/statistics

Appendix 1

VISITOR VOLUMES 2009 - 2013

STAYING HOLIDAY/LEISURE VISITORS	2009	2010	2011	2012	2013	*Change 13/12*	Average '09-'13
UK	255,990	250,680	245,940	241,130	233,650	***-3.1%***	245,480
IRELAND	5,570	4,440	4,100	3,760	3,130	***-16.8%***	4,200
OTHER CI	16,590	16,340	18,850	20,090	20,710	***3.1%***	18,520
FRANCE	34,260	36,510	40,050	36,760	37,510	***2.0%***	37,020
GERMANY	9,260	10,680	13,090	13,850	14,170	***2.3%***	12,210
NORWAY	420	580	730	1,160	880	***-24.1%***	750
SWEDEN	570	460	500	430	590	***37.2%***	510
NETHERLANDS	3,150	3,550	3,290	2,520	2,370	***-6.0%***	2,980
BELGIUM	1,610	1,520	1,450	1,450	1,280	***-11.7%***	1,460
SWITZERLAND	2,000	1,900	2,220	2,250	2,790	***24.0%***	2,230
FINLAND	150	220	210	170	150	***-11.8%***	180
DENMARK	410	450	520	290	320	***10.3%***	400
AUSTRIA	630	410	870	1,240	1,400	***12.9%***	910
SPAIN	420	360	480	310	290	***-6.5%***	370
PORTUGAL	380	220	160	250	200	***-20.0%***	240
ITALY	460	340	340	260	280	***7.7%***	340
CANADA	480	670	650	860	740	***-14.0%***	680
USA	1,110	1,340	1,210	1,120	1,090	***-2.7%***	1,170
AUSTRALIA	910	1,110	1,300	1,540	1,540	***0.0%***	1,280
OTHER	4,060	3,730	3,720	3,780	2,670	***-29.4%***	3,590
TOTAL STAYING LEISURE [1]	**338,460**	**335,520**	**339,690**	**333,210**	**325,750**	***-2.2%***	**334,530**
						Change 13/12	**Average '09-'13**
VISITING FRIENDS/RELATIVES [2]	101,010	99,780	101,740	100,570	99,830	***-0.7%***	100,590
LANGUAGE STUDENTS [3]	2,680	2,950	3,200	3,350	3,480	***3.9%***	3,130
BUSINESS VISITORS [4]	88,910	99,720	103,830	109,830	112,690	***2.6%***	103,000
CONFERENCE DELEGATES [5]	9,240	9,220	9,330	6,330	5,960	***-5.8%***	8,020
VISITING YACHTSMEN [6]	21,420	23,230	23,420	20,520	19,850	***-3.3%***	21,690
LEISURE DAYTRIPPERS [7]	98,360	101,250	103,250	101,230	101,340	***0.1%***	101,090
OTHER [8]	20,740	18,380	15,420	13,260	13,030	***-1.7%***	16,170
TOTAL VISITORS	**680,820**	**690,050**	**699,880**	**688,300**	**681,930**	***-0.9%***	**688,220**

[1] Staying leisure visitors are based upon returns of visitor registration cards and the 2009 and 2012 Travel Surveys and refer to those staying in paid accommodation.
[2] VFR estimates refer to those staying with friends and relatives, and not those who stay in paid accommodation. The estimates are based upon the 2009 and 2012 Travel Surveys.
[3] Language student numbers are based upon declarations from language schools.
[4] Business visitor estimates are based upon returns of visitor registration cards and the 2009 and 2012 Travel Surveys.
[5] Conference figures are supplied by the Jersey Conference Bureau and the hotels active in the Conference, Meetings and Incentives market.
[6] Visiting yacht figures are supplied by the Jersey Harbours.
[7] Leisure day trips are estimated from the results of the 2009 and 2012 Travel Surveys.
[8] 'Other' may refer to business or leisure visits (e.g. specific events, deliveries, visiting bands, weddings, funerals, educational trips etc.).
The 2009 and 2012 Travel Surveys had a tighter definition of "Other" than previous Exit Surveys, with many respondents being reclassified as leisure or business visitors.

Appendix 2

BREAKDOWN OF ON-ISLAND VISITOR EXPENDITURE ESTIMATES BY SOURCE MARKET FOR 2012 AND 2013

	2012		2013		2013 vs. 2012	
	Spend per Visitor	Value of Market £000's	Spend per Visitor	Value of Market £000's	% Change Spend per Visitor	% Change Value of Market
Staying Holiday/Leisure Visitors						
UK	£495	£119,329	£506	£118,154	2%	-1%
Ireland	£478	£1,796	£472	£1,476	-1%	-18%
Other C.I.	£245	£4,930	£249	£5,160	2%	5%
France	£281	£10,346	£275	£10,317	-2%	0%
Germany	£807	£11,180	£802	£11,359	-1%	2%
Benelux	£496	£1,971	£469	£1,863	-5%	-5%
Other	£684	£9,341	£703	£8,871	3%	-5%
Staying Leisure Total [1]	**£477**	**£158,892**	**£483**	**£157,201**	**1%**	**-1%**
Visiting friends/relatives [1]	**£222**	**£22,366**	**£228**	**£22,713**	**3%**	**2%**
Language students [2]	**£951**	**£3,186**	**£953**	**£3,316**	**0%**	**4%**
Daytrippers - French	£44	£2,773	£45	£2,854	2%	3%
Daytrippers - UK	£45	£368	£46	£373	2%	1%
Daytrippers - Other C.I.	£85	£1,469	£87	£1,461	2%	-1%
Daytrippers - Other	£35	£425	£36	£436	3%	3%
Daytrippers - Total [1]	**£50**	**£5,035**	**£51**	**£5,125**	**2%**	**2%**
Visiting yachtsmen [3]	£108	£2,210	£108	£2,139	0%	-3%
Business - Day visitors	£85	£3,621	£87	£3,715	2%	3%
Business - Staying visitors	£350	£23,489	£358	£24,973	2%	6%
Business visitors - Total [1]	**£247**	**£27,110**	**£255**	**£28,688**	**3%**	**6%**
Conference - Association	£652	£2,090	£695	£2,405	7%	15%
Conference - Corporate	£362	£1,132	£418	£1,048	15%	-7%
Conference delegates - Total [4]	**£509**	**£3,222**	**£579**	**£3,454**	**14%**	**7%**
Other - Day visitors	£50	£266	£51	£273	2%	3%
Other - Staying visitors	£625	£4,947	£631	£4,833	1%	-2%
Other visitors - Total [1]	**£393**	**£5,213**	**£392**	**£5,106**	**0%**	**-2%**
Total Visitors	**£330**	**£227,233**	**£334**	**£227,741**	**1%**	**0%**

[1] Expenditure is calculated by using results from the 2012 Jersey Travel Survey. 2013 estimates have been updated based on Jersey's September RPI.

[2] Expenditure is estimated based upon local tuition fees and estimated additional on-Island spend.

[3] Expenditure is calculated by using results from the 2012 Visiting Yachts Survey. 2013 estimates have been updated based on Jersey's September RPI.

[4] Expenditure is calculated by using results from the 2012 Jersey Travel Survey, Jersey's September RPI and ongoing research into conference delegate rates.

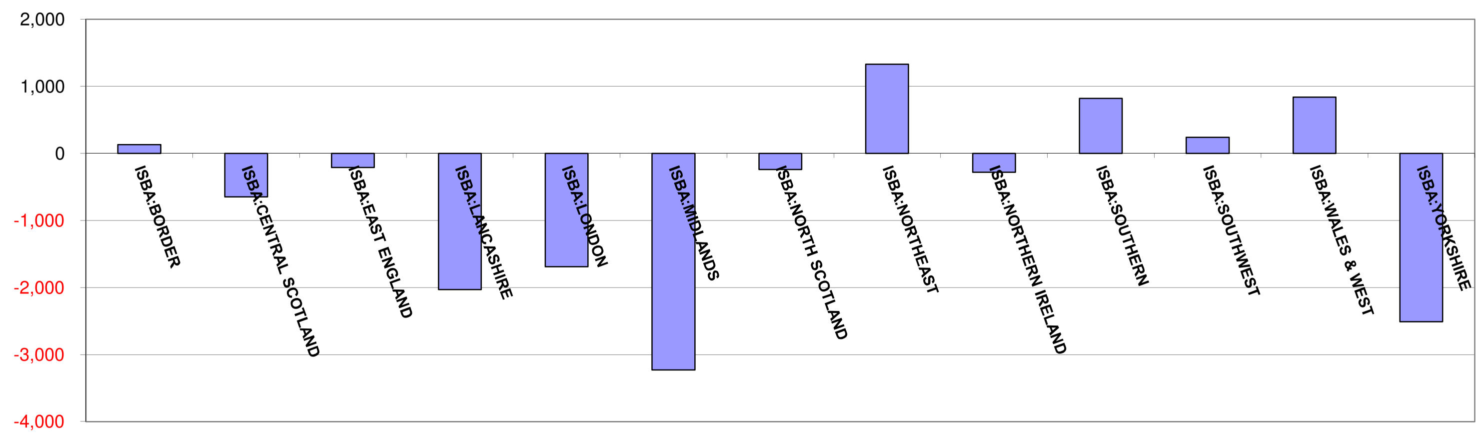
N.b. 2012 figures in the above table have not been reflated to 2013 prices.

Appendix 3 UK Staying Leisure Visitors by ISBA Region 2009 - 2013

REGION	UK Households	2009	Market Share	2010	Market Share	2011	Market Share	2012	Market Share	2013	Market Share	% Change 13/12	Vol. Change 13/12	2013 Index
ISBA:BORDER	1.2%	2,610	1%	2,440	1%	2,670	1%	2,400	1%	2,530	1%	5.4%	130	0.90
ISBA:CENTRAL SCOTLAND	6.3%	8,890	4%	10,120	4%	10,110	4%	10,770	4%	10,120	4%	-6.0%	-650	0.69
ISBA:EAST ENGLAND	6.7%	17,690	7%	17,250	7%	16,680	7%	17,640	7%	17,430	7%	-1.2%	-210	1.11
ISBA:LANCASHIRE	11.6%	26,290	10%	28,640	12%	27,540	11%	24,890	10%	22,860	10%	-8.2%	-2,030	0.84
ISBA:LONDON	19.4%	51,550	21%	48,270	20%	47,630	20%	52,480	22%	50,790	22%	-3.2%	-1,690	1.12
ISBA:MIDLANDS	15.4%	41,790	17%	39,640	16%	38,950	16%	36,420	15%	33,190	14%	-8.9%	-3,230	0.92
ISBA:NORTH SCOTLAND	2.1%	4,640	2%	5,110	2%	5,080	2%	5,130	2%	4,890	2%	-4.7%	-240	1.00
ISBA:NORTHEAST	5.1%	6,890	3%	8,180	3%	8,190	3%	7,930	3%	9,260	4%	16.8%	1,330	0.78
ISBA:NORTHERN IRELAND	2.4%	5,080	2%	4,980	2%	5,010	2%	4,780	2%	4,500	2%	-5.9%	-280	0.80
ISBA:SOUTHERN	9.2%	33,330	13%	32,030	13%	32,980	14%	31,830	13%	32,650	14%	2.6%	820	1.52
ISBA:SOUTHWEST	3.0%	10,020	4%	10,030	4%	9,970	4%	8,250	3%	8,490	4%	2.9%	240	1.21
ISBA:WALES & WEST	7.7%	23,210	9%	21,010	9%	19,140	8%	17,900	7%	18,740	8%	4.7%	840	1.04
ISBA:YORKSHIRE	9.9%	24,000	10%	22,980	9%	21,990	9%	20,710	9%	18,200	8%	-12.1%	-2,510	0.79
TOTAL		255,990		250,680		245,940		241,130		233,650		-3.1%	-7,480	

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

Visitor volume changes by ISBA region 2013 vs. 2012



Appendix 4

French Staying Leisure Visitors by Region 2009-2013

	2009	% market share	2010	% market share	2011	% market share	2012	% market share	2013	% market share	Change 13/12
BRITTANY	12,810	35%	13,650	34%	14,960	41%	14,520	39%	15,620	42%	***8%***
GREATER PARIS	5,660	16%	6,070	15%	7,050	19%	5,860	16%	5,770	15%	***-2%***
NORMANDY	5,220	14%	5,630	14%	5,540	15%	4,780	13%	5,470	15%	***14%***
LOIRE VALLEY	5,910	16%	6,030	15%	6,510	18%	6,100	16%	6,170	16%	***1%***
SOUTH EAST	910	2%	1,190	3%	1,320	4%	1,230	3%	1,000	3%	***-19%***
SOUTH WEST	890	2%	910	2%	1,100	3%	940	3%	920	2%	***-2%***
MEDITERRANEAN	610	2%	600	1%	920	3%	590	2%	530	1%	***-10%***
POITOU-CHARENTES	530	1%	580	1%	680	2%	850	2%	510	1%	***-40%***
NORTH EAST	490	1%	510	1%	600	2%	520	1%	440	1%	***-15%***
NORTH	500	1%	550	1%	510	1%	460	1%	370	1%	***-20%***
PICARDY	380	1%	320	1%	410	1%	360	1%	320	1%	***-11%***
BURGUNDY	170	0%	210	1%	220	1%	310	1%	240	1%	***-23%***
CHAMPAGNE	180	0%	260	1%	230	1%	240	1%	150	0%	***-38%***
TOTAL	**34,260**		**36,510**		**40,050**		**36,760**		**37,510**		***2%***

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 2009 - 2013

Type	Group	% Households	Type Description	% Households	2009	2010	2011	2012	2013	Index 2013
1	Alpha Territory	3.5%	Global Power Brokers	0.3%	0.4%	0.4%	0.4%	0.3%	0.3%	0.91
2			Voices of Authority	1.2%	1.8%	1.8%	1.8%	1.9%	1.8%	1.56
3			Business Class	1.5%	3.3%	3.3%	3.4%	3.3%	3.7%	2.50
4			Serious Money	0.6%	1.4%	1.4%	1.5%	1.4%	1.3%	2.31
5	Professional Rewards	8.2%	Mid-Career Climbers	2.3%	4.0%	4.0%	4.0%	3.9%	4.1%	1.77
6			Yesterday's Captains	1.8%	4.3%	4.5%	4.3%	4.1%	4.7%	2.53
7			Distinctive Success	0.5%	1.6%	1.5%	1.6%	1.6%	1.3%	2.69
8			Dormitory Villagers	1.3%	3.3%	3.3%	3.3%	3.2%	3.4%	2.63
9			Escape to the Country	1.3%	2.4%	2.4%	2.6%	2.5%	2.4%	1.80
10			Parish Guardians	1.0%	2.0%	2.0%	2.1%	1.9%	2.0%	1.97
11	Rural Solitude	4.4%	Squires Among Locals	0.9%	2.1%	2.0%	2.0%	2.1%	2.0%	2.32
12			Country Loving Elders	1.3%	1.6%	1.6%	1.8%	1.6%	1.8%	1.38
13			Modern Agribusiness	1.4%	1.7%	1.6%	1.7%	1.5%	1.6%	1.21
14			Farming Today	0.5%	0.9%	0.9%	1.0%	0.9%	0.8%	1.55
15			Upland Struggle	0.3%	0.4%	0.4%	0.5%	0.4%	0.4%	1.23
16	Small Town Diversity	8.8%	Side Street Singles	1.2%	1.1%	1.1%	1.2%	1.1%	1.0%	0.88
17			Jack of All Trades	2.0%	2.5%	2.6%	2.5%	2.5%	2.5%	1.26
18			Hardworking Families	2.6%	3.4%	3.5%	3.3%	3.3%	3.5%	1.31
19			Innate Conservatives	3.0%	4.5%	4.6%	4.5%	4.7%	4.6%	1.57
20	Active Retirement	4.4%	Golden Retirement	0.7%	1.2%	1.2%	1.1%	1.1%	1.2%	1.75
21			Bungalow Quietude	1.8%	2.3%	2.3%	2.2%	2.2%	2.3%	1.29
22			Beachcombers	0.6%	1.0%	0.9%	0.9%	0.9%	1.0%	1.70
23			Balcony Downsizers	1.3%	1.1%	1.2%	1.1%	1.2%	1.1%	0.87
24	Suburban Mindsets	11.2%	Garden Suburbia	2.1%	3.9%	3.7%	3.9%	3.8%	4.2%	1.97
25			Production Managers	2.6%	3.9%	4.1%	3.9%	3.8%	4.1%	1.56
26			Mid-Market Families	2.7%	2.7%	2.6%	2.7%	2.7%	2.6%	0.97
27			Shop Floor Affluence	2.7%	2.4%	2.4%	2.5%	2.5%	2.3%	0.85
28			Asian Attainment	1.0%	0.4%	0.4%	0.4%	0.5%	0.5%	0.50
29	Careers and Kids	5.8%	Footloose Managers	1.7%	2.5%	2.4%	2.5%	2.5%	2.3%	1.35
30			Soccer Dads and Mums	1.3%	1.4%	1.5%	1.5%	1.4%	1.4%	1.05
31			Domestic Comfort	1.1%	2.5%	2.4%	2.3%	2.4%	2.2%	2.06
32			Childcare Years	1.5%	1.5%	1.4%	1.4%	1.4%	1.4%	0.90
33			Military Dependants	0.2%	0.1%	0.1%	0.1%	0.1%	0.1%	0.62
34	New Homemakers	5.9%	Buy-to-Let Territory	1.8%	0.7%	0.7%	0.6%	0.7%	0.7%	0.37
35			Brownfield Pioneers	1.4%	0.6%	0.7%	0.6%	0.6%	0.6%	0.47
36			Foot on the Ladder	2.4%	1.6%	1.5%	1.7%	1.6%	1.4%	0.58
37			First to Move In	0.4%	0.2%	0.3%	0.4%	0.4%	0.2%	0.62
38	Ex-Council Community	8.7%	Settled Ex-Tenants	2.1%	1.1%	1.1%	1.1%	1.0%	1.1%	0.52
39			Choice Right to Buy	1.7%	1.5%	1.6%	1.5%	1.6%	1.6%	0.92
40			Legacy of Labour	2.7%	1.1%	1.1%	1.1%	1.2%	1.1%	0.41
41			Stressed Borrowers	2.2%	1.4%	1.4%	1.3%	1.4%	1.4%	0.64
42	Claimant Cultures	5.2%	Worn-Out Workers	2.3%	0.7%	0.8%	0.7%	0.8%	0.8%	0.35
43			Streetwise Kids	1.1%	0.4%	0.4%	0.3%	0.4%	0.4%	0.37
44			New Parents in Need	1.8%	0.4%	0.3%	0.3%	0.4%	0.4%	0.21
45	Upper Floor Living	5.2%	Small Block Singles	1.8%	0.3%	0.3%	0.3%	0.3%	0.3%	0.15
46			Tenement Living	0.8%	0.3%	0.2%	0.3%	0.3%	0.3%	0.31
47			Deprived View	0.5%	0.1%	0.1%	0.1%	0.1%	0.1%	0.14
48			Multicultural Towers	1.1%	0.3%	0.4%	0.3%	0.4%	0.4%	0.34
49			Re-Housed Migrants	1.0%	0.3%	0.3%	0.3%	0.4%	0.4%	0.44
50	Elderly Needs	6.0%	Pensioners in Blocks	1.3%	0.4%	0.4%	0.4%	0.4%	0.4%	0.33
51			Sheltered Seniors	1.1%	0.4%	0.5%	0.4%	0.4%	0.4%	0.32
52			Meals on Wheels	0.9%	0.5%	0.5%	0.5%	0.5%	0.5%	0.55
53			Low Spending Elders	2.7%	1.4%	1.4%	1.4%	1.3%	1.2%	0.47
54	Industrial Heritage	7.4%	Clocking Off	2.3%	2.8%	2.8%	2.7%	2.6%	2.7%	1.20
55			Backyard Regeneration	2.1%	2.2%	2.4%	2.3%	2.3%	2.0%	0.99
56			Small Wage Owners	3.1%	2.2%	2.2%	2.2%	2.1%	2.2%	0.71
57	Terrace Melting Pot	7.0%	Back-to-Back Basics	2.0%	0.9%	0.8%	0.9%	0.8%	0.8%	0.40
58			Asian Identifiers	0.9%	0.1%	0.1%	0.2%	0.1%	0.1%	0.09
59			Low-Key Starters	2.7%	1.2%	1.1%	1.0%	1.1%	0.9%	0.34
60			Global Fusion	1.4%	0.7%	0.7%	0.7%	0.8%	0.9%	0.61
61	Liberal Opinions	8.5%	Convivial Homeowners	1.7%	1.7%	1.7%	1.7%	1.8%	1.8%	1.08
62			Crash Pad Professionals	1.1%	1.3%	1.3%	1.2%	1.3%	1.3%	1.22
63			Urban Cool	1.1%	1.3%	1.3%	1.3%	1.5%	1.3%	1.17
64			Bright Young Things	1.5%	1.2%	1.1%	1.1%	1.3%	1.3%	0.83
65			Anti-Materialists	1.0%	0.4%	0.5%	0.5%	0.5%	0.5%	0.50
66			University Fringe	0.9%	0.6%	0.6%	0.6%	0.5%	0.5%	0.57
67			Study Buddies	1.1%	0.1%	0.2%	0.2%	0.2%	0.2%	0.15

MOSAIC is a geodemographic profiling system based upon UK postcodes.

This table shows the geo-demographic profile of visitors to Jersey between 2008 and 2012. 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 2009 - 2013

COUNTRY	Stay																				Average Stay				
	1 - 3 Nights					4 - 6 Nights					7 Nights					8+ Nights					Nights				
	2009	2010	2011	2012	2013	2009	2010	2011	2012	2013	2009	2010	2011	2012	2013	2009	2010	2011	2012	2013	2009	2010	2011	2012	2013
UK	39%	41%	40%	41%	39%	25%	26%	28%	28%	30%	28%	26%	26%	25%	25%	8%	7%	7%	6%	6%	4.8	4.7	4.8	4.7	4.7
IRELAND	34%	38%	34%	38%	38%	27%	27%	28%	23%	27%	31%	26%	30%	31%	29%	8%	9%	7%	8%	6%	5.0	5.0	5.0	4.9	4.8
OTHER CI	91%	93%	93%	93%	93%	7%	6%	5%	6%	5%	2%	1%	1%	1%	1%	0%	0%	0%	1%	0%	2.0	1.9	1.9	1.9	1.9
FRANCE	89%	89%	88%	89%	89%	8%	9%	9%	9%	9%	2%	2%	2%	2%	2%	1%	1%	1%	1%	1%	2.1	2.1	2.1	2.1	2.0
GERMANY	25%	26%	23%	22%	21%	26%	24%	31%	19%	20%	33%	37%	34%	47%	48%	15%	14%	13%	12%	11%	5.9	5.9	5.9	6.2	6.1
NORWAY	32%	47%	57%	25%	35%	35%	20%	25%	11%	23%	20%	21%	8%	61%	34%	13%	11%	10%	3%	8%	5.1	4.7	4.5	5.7	5.1
SWEDEN	25%	41%	30%	61%	30%	58%	32%	30%	23%	55%	8%	11%	12%	10%	8%	8%	16%	28%	6%	7%	4.3	4.8	6.7	3.7	4.4
HOLLAND	37%	41%	41%	42%	49%	23%	26%	23%	26%	26%	26%	24%	28%	26%	18%	15%	9%	7%	7%	7%	5.1	4.9	4.9	4.8	4.4
BELGIUM	52%	52%	54%	53%	54%	32%	32%	32%	31%	32%	10%	11%	10%	14%	10%	6%	5%	4%	3%	3%	3.7	3.7	3.7	3.9	3.7
SWITZERLAND	44%	40%	36%	38%	40%	32%	30%	35%	33%	32%	13%	20%	19%	20%	18%	11%	10%	9%	9%	10%	4.4	4.9	4.9	4.9	4.8
FINLAND	40%	44%	60%	51%	52%	44%	42%	20%	35%	24%	7%	8%	10%	9%	20%	9%	5%	10%	5%	3%	4.1	3.8	4.2	3.8	3.8
DENMARK	57%	61%	65%	51%	54%	16%	17%	17%	21%	19%	19%	10%	12%	19%	22%	7%	12%	6%	8%	5%	4.0	4.0	3.7	4.6	3.9
AUSTRIA	54%	42%	50%	53%	49%	21%	20%	15%	19%	16%	16%	29%	29%	25%	31%	9%	10%	6%	3%	4%	4.2	4.9	4.7	4.1	4.5
SPAIN	48%	61%	63%	58%	53%	24%	23%	20%	25%	31%	6%	8%	8%	8%	5%	21%	8%	9%	9%	12%	5.2	3.9	4.0	3.9	4.4
PORTUGAL	45%	65%	49%	60%	45%	30%	19%	29%	15%	31%	7%	9%	8%	10%	11%	18%	6%	14%	16%	14%	4.9	3.6	5.0	4.9	5.0
ITALY	39%	64%	64%	59%	62%	54%	21%	19%	30%	19%	3%	8%	7%	4%	10%	4%	7%	10%	7%	10%	4.2	3.5	4.0	4.0	4.1
CANADA	47%	50%	47%	44%	39%	29%	30%	24%	28%	36%	7%	9%	9%	7%	6%	17%	11%	21%	21%	19%	5.0	4.4	4.7	5.0	5.0
USA	68%	71%	63%	63%	64%	23%	21%	25%	23%	25%	4%	4%	6%	8%	7%	5%	4%	6%	6%	4%	3.3	3.1	3.7	3.6	3.4
AUSTRALIA	59%	56%	58%	61%	60%	26%	29%	29%	25%	29%	7%	9%	8%	8%	7%	9%	6%	5%	6%	4%	3.8	4.0	3.8	3.7	3.7
OTHER	65%	62%	58%	59%	55%	21%	21%	24%	25%	28%	7%	11%	10%	9%	8%	7%	6%	8%	7%	9%	3.5	3.7	4.0	3.8	4.2
TOTAL	47%	48%	48%	49%	48%	23%	23%	24%	24%	25%	23%	22%	22%	22%	22%	7%	6%	6%	6%	5%	4.4	4.3	4.3	4.3	4.3

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 & Booking Patterns - Profile of Staying Leisure Visitors 2009 - 2013

COUNTRY	% Tour Operator					% First Time Visitors					When booked < 1 month					1 - 3 months					> 3 months					Travel By Air				
	2009	2010	2011	2012	2013	2009	2010	2011	2012	2013	2009	2010	2011	2012	2013	2009	2010	2011	2012	2013	2009	2010	2011	2012	2013	2009	2010	2011	2012	2013
UK	52%	49%	55%	58%	60%	44%	47%	44%	44%	45%	29%	29%	29%	29%	29%	38%	37%	35%	35%	36%	32%	34%	36%	35%	35%	81%	81%	78%	82%	80%
IRELAND	41%	38%	45%	48%	54%	51%	50%	49%	45%	48%	33%	40%	36%	37%	32%	38%	34%	33%	32%	39%	29%	27%	30%	31%	29%	94%	94%	95%	95%	95%
OTHER CI	49%	42%	45%	48%	52%	10%	13%	11%	12%	10%	59%	60%	59%	56%	54%	32%	29%	29%	32%	31%	9%	11%	12%	12%	14%	51%	52%	45%	51%	51%
FRANCE	62%	61%	65%	67%	68%	60%	61%	61%	62%	59%	62%	60%	60%	56%	59%	31%	32%	32%	34%	32%	7%	8%	8%	10%	9%	10%	8%	6%	6%	6%
GERMANY	62%	65%	68%	73%	71%	78%	79%	78%	80%	82%	25%	22%	19%	19%	18%	36%	33%	34%	38%	40%	39%	45%	47%	43%	43%	58%	65%	65%	71%	69%
NORWAY	33%	35%	51%	80%	82%	63%	62%	39%	75%	65%	28%	31%	41%	35%	31%	37%	44%	40%	34%	31%	35%	25%	20%	31%	38%	75%	66%	71%	64%	77%
SWEDEN	66%	49%	58%	65%	78%	66%	57%	72%	61%	37%	31%	36%	29%	37%	57%	41%	42%	36%	40%	27%	28%	22%	35%	23%	16%	49%	65%	67%	68%	64%
HOLLAND	56%	55%	57%	59%	58%	74%	78%	80%	82%	78%	34%	35%	31%	32%	37%	35%	40%	40%	39%	40%	30%	25%	29%	29%	24%	51%	51%	53%	56%	49%
BELGIUM	50%	58%	60%	64%	68%	72%	72%	77%	69%	71%	42%	45%	39%	31%	40%	34%	32%	34%	35%	36%	24%	22%	27%	34%	24%	34%	35%	21%	31%	31%
SWITZERLAND	55%	59%	65%	61%	62%	63%	74%	63%	69%	71%	35%	39%	28%	30%	34%	43%	36%	41%	41%	34%	28%	25%	31%	29%	32%	79%	78%	77%	75%	74%
FINLAND	56%	55%	71%	67%	72%	76%	74%	61%	77%	72%	39%	64%	24%	42%	33%	41%	22%	59%	46%	41%	20%	14%	18%	12%	26%	70%	56%	62%	56%	78%
DENMARK	40%	32%	39%	50%	58%	62%	55%	64%	63%	69%	45%	37%	43%	32%	39%	32%	34%	31%	43%	29%	22%	29%	26%	25%	32%	57%	60%	51%	71%	73%
AUSTRIA	55%	47%	67%	77%	78%	73%	75%	68%	62%	66%	32%	23%	29%	28%	19%	38%	31%	46%	57%	32%	30%	46%	26%	16%	49%	68%	67%	60%	71%	76%
SPAIN	36%	39%	51%	41%	38%	51%	50%	51%	55%	42%	61%	59%	58%	52%	42%	21%	22%	24%	32%	33%	18%	19%	18%	16%	25%	77%	67%	55%	76%	64%
PORTUGAL	28%	25%	24%	23%	20%	45%	57%	42%	34%	35%	50%	64%	69%	53%	62%	42%	25%	21%	34%	21%	9%	11%	10%	13%	17%	90%	76%	92%	80%	87%
ITALY	33%	24%	32%	30%	32%	79%	67%	69%	72%	59%	61%	59%	56%	48%	35%	28%	28%	25%	34%	46%	11%	13%	19%	17%	19%	72%	49%	56%	71%	75%
CANADA	48%	44%	58%	56%	57%	59%	64%	66%	69%	69%	35%	34%	27%	33%	25%	42%	39%	41%	34%	40%	22%	27%	32%	32%	35%	83%	70%	75%	74%	76%
USA	41%	38%	40%	42%	38%	53%	68%	65%	61%	67%	45%	43%	41%	42%	34%	40%	40%	35%	34%	34%	15%	17%	24%	24%	32%	82%	78%	72%	78%	76%
AUSTRALIA	41%	37%	46%	48%	54%	57%	60%	67%	58%	59%	44%	38%	37%	39%	31%	34%	30%	33%	32%	33%	23%	31%	30%	28%	36%	71%	67%	67%	69%	72%
OTHER	47%	37%	41%	50%	45%	62%	58%	63%	60%	57%	46%	47%	44%	49%	52%	39%	34%	32%	31%	29%	15%	19%	24%	20%	19%	88%	82%	78%	85%	82%
TOTAL	52%	49%	55%	59%	61%	45%	49%	47%	47%	47%	35%	36%	34%	34%	33%	37%	34%	34%	35%	36%	28%	30%	32%	31%	31%	72%	71%	67%	71%	69%

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 2009 - 2013

COUNTRY	Age Groups (years)																			
	16 - 24					25-34					35 - 44					45 - 54				
	2009	2010	2011	2012	2013	2009	2010	2011	2012	2013	2009	2010	2011	2012	2013	2009	2010	2011	2012	2013
UK	3%	3%	3%	3%	3%	8%	9%	8%	8%	8%	14%	13%	12%	12%	11%	21%	20%	20%	19%	19%
IRELAND	5%	3%	4%	4%	3%	19%	18%	16%	12%	13%	20%	18%	17%	18%	19%	18%	20%	21%	20%	21%
OTHER CI	18%	17%	18%	15%	14%	23%	22%	22%	21%	23%	20%	20%	19%	20%	19%	20%	19%	18%	21%	21%
FRANCE	6%	7%	7%	7%	7%	17%	15%	15%	15%	16%	22%	19%	20%	20%	20%	24%	26%	26%	24%	23%
GERMANY	2%	2%	2%	2%	1%	7%	5%	6%	5%	5%	19%	15%	13%	14%	11%	24%	27%	25%	29%	29%
NORWAY	3%	11%	12%	4%	3%	6%	9%	13%	9%	9%	15%	19%	21%	15%	9%	23%	27%	17%	22%	23%
SWEDEN	2%	6%	10%	3%	7%	7%	5%	9%	5%	9%	10%	14%	10%	12%	13%	29%	31%	22%	26%	30%
HOLLAND	2%	2%	3%	3%	3%	10%	6%	8%	7%	8%	18%	15%	14%	14%	14%	28%	29%	29%	25%	25%
BELGIUM	4%	6%	3%	3%	5%	10%	8%	12%	10%	9%	18%	19%	13%	16%	18%	33%	31%	32%	26%	28%
SWITZERLAND	5%	5%	2%	3%	4%	12%	11%	10%	9%	9%	22%	18%	16%	16%	14%	23%	22%	28%	29%	32%
FINLAND	3%	0%	24%	4%	3%	9%	18%	7%	15%	18%	25%	33%	31%	26%	21%	35%	37%	25%	28%	42%
DENMARK	5%	4%	5%	2%	5%	5%	6%	8%	6%	8%	11%	15%	14%	17%	8%	29%	17%	21%	26%	24%
AUSTRIA	2%	3%	5%	4%	4%	8%	8%	6%	8%	6%	15%	16%	13%	10%	15%	32%	25%	34%	25%	34%
SPAIN	9%	3%	6%	2%	1%	17%	8%	15%	10%	9%	22%	17%	19%	16%	16%	16%	29%	26%	16%	33%
PORTUGAL	15%	7%	6%	12%	5%	29%	29%	23%	26%	18%	21%	24%	17%	28%	20%	18%	27%	25%	14%	23%
ITALY	9%	9%	4%	7%	6%	18%	17%	17%	18%	24%	32%	17%	22%	26%	26%	20%	25%	23%	22%	15%
CANADA	4%	4%	3%	3%	2%	5%	8%	6%	5%	5%	9%	6%	7%	8%	9%	19%	17%	12%	16%	11%
USA	3%	4%	5%	2%	3%	9%	10%	7%	9%	10%	14%	10%	15%	13%	11%	22%	17%	12%	14%	17%
AUSTRALIA	4%	2%	2%	3%	3%	11%	9%	8%	8%	8%	10%	10%	8%	11%	9%	20%	15%	17%	17%	15%
OTHER	15%	8%	11%	11%	6%	22%	21%	22%	21%	22%	17%	17%	19%	14%	20%	13%	19%	17%	18%	18%
TOTAL	5%	4%	4%	4%	4%	9%	10%	10%	10%	10%	15%	14%	14%	14%	13%	22%	21%	21%	21%	20%

COUNTRY	Age Groups (years)															Average Adult Age				
	55 - 64					65 - 74					75+					Years				
	2009	2010	2011	2012	2013	2009	2010	2011	2012	2013	2009	2010	2011	2012	2013	2009	2010	2011	2012	2013
UK	24%	24%	23%	22%	23%	19%	20%	21%	22%	24%	11%	12%	13%	13%	14%	55	56	56	56	57
IRELAND	21%	23%	21%	22%	22%	12%	13%	14%	17%	18%	5%	5%	6%	6%	5%	48	50	50	52	52
OTHER CI	11%	13%	13%	13%	13%	6%	7%	7%	7%	8%	2%	2%	2%	2%	2%	42	41	41	42	42
FRANCE	20%	20%	20%	20%	20%	8%	9%	9%	10%	10%	3%	3%	3%	4%	3%	46	47	47	48	47
GERMANY	21%	24%	23%	25%	25%	21%	21%	24%	19%	19%	6%	7%	8%	7%	8%	53	55	56	55	56
NORWAY	32%	20%	17%	22%	28%	18%	10%	14%	22%	23%	3%	4%	5%	7%	5%	50	48	47	54	55
SWEDEN	35%	34%	27%	39%	28%	12%	10%	20%	11%	11%	5%	1%	3%	3%	1%	54	51	51	54	50
HOLLAND	26%	32%	31%	33%	32%	11%	11%	11%	14%	14%	5%	4%	5%	4%	5%	51	53	52	53	53
BELGIUM	20%	26%	24%	29%	29%	10%	8%	10%	11%	9%	5%	2%	6%	5%	2%	48	49	51	52	50
SWITZERLAND	22%	20%	23%	22%	22%	11%	17%	17%	16%	12%	5%	7%	5%	4%	7%	49	52	52	52	52
FINLAND	17%	4%	8%	20%	12%	10%	8%	5%	7%	3%	1%	0%	0%	0%	0%	46	45	40	46	45
DENMARK	32%	29%	32%	21%	25%	12%	25%	19%	26%	22%	6%	5%	2%	2%	9%	55	55	53	53	55
AUSTRIA	18%	21%	19%	26%	25%	20%	24%	17%	23%	12%	5%	4%	6%	4%	4%	52	54	52	54	52
SPAIN	16%	20%	13%	36%	21%	15%	18%	17%	12%	14%	5%	4%	4%	7%	6%	49	52	49	54	52
PORTUGAL	10%	9%	11%	10%	18%	5%	4%	17%	10%	12%	2%	0%	2%	0%	3%	44	41	47	41	47
ITALY	14%	20%	26%	16%	12%	6%	8%	8%	9%	11%	1%	4%	0%	1%	6%	42	47	47	45	46
CANADA	24%	24%	25%	20%	31%	24%	24%	25%	29%	22%	15%	16%	22%	20%	21%	55	58	61	60	62
USA	22%	25%	25%	26%	24%	20%	25%	29%	27%	24%	10%	10%	8%	8%	13%	52	56	56	56	57
AUSTRALIA	28%	30%	30%	29%	29%	21%	28%	27%	26%	31%	6%	6%	8%	6%	6%	53	57	57	56	57
OTHER	17%	19%	15%	19%	18%	12%	14%	11%	12%	13%	4%	2%	4%	4%	3%	45	46	45	46	47
TOTAL	23%	23%	22%	22%	22%	17%	18%	19%	19%	20%	9%	10%	10%	10%	11%	53	54	54	54	55

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 2009 – 2013

	2009	2010	2011	2012	2013
Hotels	71	70	68	67	67
Guest Houses	43	42	44	43	42
Self-Catering	24	24	25	25	26
Campsites	4	4	4	3	4
Youth Hostel	0	1	2	2	2
Total	**142**	**141**	**143**	**140**	**141**

Accommodation Bed Spaces by Category 2009 – 2013

	2009	2010	2011	2012	2013
Hotels	9,045	9,199	9,189	9,089	8,976
Guest Houses	982	984	1,055	1,011	977
Self-Catering	760	922	870	928	983
Campsites	1,250	758	762	612	636
Youth Hostel	0	24	80	139	151
Total	**12,037**	**11,887**	**11,956**	**11,779**	**11,723**

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 2012 and 2013

2012	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Year
Bed nights available	163,130	178,217	210,083	305,420	353,209	346,455	360,988	362,500	340,430	278,579	222,639	200,376	**3,322,026**
Bed nights sold	29,112	48,696	76,005	116,416	190,295	230,527	260,242	283,809	226,566	112,394	56,274	54,121	**1,684,457**
Total bed occupancy	**18%**	**27%**	**36%**	**38%**	**54%**	**67%**	**72%**	**78%**	**67%**	**40%**	**25%**	**27%**	**51%**
Hotel bed nights available	126,333	141,773	166,171	241,271	275,272	267,180	278,690	278,473	266,496	225,422	185,594	163,570	**2,616,245**
Guest House bed nights available	10,621	10,775	16,292	21,424	26,447	26,790	27,661	28,646	24,897	20,604	12,852	10,808	**237,817**
Serviced bed nights available	136,954	152,548	182,463	262,695	301,719	293,970	306,351	307,119	291,393	246,026	198,446	174,378	**2,854,062**
Unserviced bed nights available	26,176	25,669	27,620	42,725	51,490	52,485	54,637	55,381	49,037	32,553	24,193	25,998	**467,964**
Bed nights sold in serviced accommodation	23,954	40,859	67,201	103,352	172,927	198,740	222,263	239,636	192,977	99,350	51,586	47,688	**1,460,533**
Total bed occupancy in serviced	17%	27%	37%	39%	57%	68%	73%	78%	66%	40%	26%	27%	**51%**
Hotel bed nights sold	22,618	38,743	63,464	97,757	161,279	185,743	206,220	222,804	181,408	94,039	49,263	46,107	**1,369,445**
Guest House bed nights sold	1,336	2,116	3,737	5,595	11,648	12,997	16,043	16,832	11,569	5,311	2,323	1,581	**91,088**
Hotel bed space occupancy	18%	27%	38%	41%	59%	70%	74%	80%	68%	42%	27%	28%	**52%**
Guest House bed space occupancy	13%	20%	23%	26%	44%	49%	58%	59%	46%	26%	18%	15%	**38%**
Other bed nights sold	5,158	7,837	8,804	13,064	17,368	31,787	37,979	44,173	33,589	13,044	4,688	6,433	**223,924**
Other bed space occupancy	20%	31%	32%	31%	34%	61%	70%	80%	68%	40%	19%	25%	**48%**

2013	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Year
Bed nights available	173,694	178,473	231,360	302,608	362,357	354,203	366,675	367,054	347,141	284,261	221,939	188,950	**3,378,715**
Bed nights sold	26,592	41,894	79,297	104,302	199,343	219,484	267,856	288,880	221,179	120,886	56,126	52,989	**1,678,828**
Total bed occupancy	**15%**	**23%**	**34%**	**34%**	**55%**	**62%**	**73%**	**79%**	**64%**	**43%**	**25%**	**28%**	**50%**
Hotel bed nights available	135,286	143,860	180,754	234,108	276,011	267,990	276,923	277,233	267,189	222,937	181,739	153,611	**2,617,641**
Guest House bed nights available	9,477	10,777	18,980	21,705	26,835	26,640	27,396	27,528	25,560	21,197	12,388	10,846	**239,329**
Serviced bed nights available	144,763	154,637	199,734	255,813	302,846	294,630	304,319	304,761	292,749	244,134	194,127	164,457	**2,856,970**
Unserviced bed nights available	28,931	23,836	31,626	46,795	59,511	59,573	62,356	62,293	54,392	40,127	27,812	24,493	**521,745**
Bed nights sold in serviced accommodation	22,579	36,629	71,630	92,393	175,509	190,663	230,727	243,618	188,793	103,370	50,547	45,605	**1,452,063**
Total bed occupancy in serviced	16%	24%	36%	36%	58%	65%	76%	80%	64%	42%	26%	28%	**51%**
Hotel bed nights sold	21,592	35,600	68,598	87,669	165,184	178,819	215,958	226,993	178,233	98,250	48,308	44,025	**1,369,229**
Guest House bed nights sold	987	1,029	3,032	4,724	10,325	11,844	14,769	16,625	10,560	5,120	2,239	1,580	**82,834**
Hotel bed space occupancy	16%	25%	38%	37%	60%	67%	78%	82%	67%	44%	27%	29%	**52%**
Guest House bed space occupancy	10%	10%	16%	22%	38%	44%	54%	60%	41%	24%	18%	15%	**35%**
Other bed nights sold	4,013	5,265	7,667	11,909	23,834	28,821	37,129	45,262	32,386	17,516	5,579	7,384	**226,765**
Other bed space occupancy	14%	22%	24%	25%	40%	48%	60%	73%	60%	44%	20%	30%	**43%**

Appendix 11

Room space occupancy 2012 and 2013

2012	**Jan**	**Feb**	**Mar**	**Apr**	**May**	**Jun**	**Jul**	**Aug**	**Sep**	**Oct**	**Nov**	**Dec**	**Year**
Room nights available	74,104	81,762	96,795	136,769	157,031	153,275	160,049	160,485	152,180	128,882	103,608	92,059	**1,496,999**
Room nights sold	22,542	33,373	47,633	66,625	101,031	115,830	124,901	135,792	119,337	66,010	37,250	31,835	**902,159**
Room night occupancy	**30%**	**41%**	**49%**	**49%**	**64%**	**76%**	**78%**	**85%**	**78%**	**51%**	**36%**	**35%**	**60%**
Hotel room nights available	61,191	69,158	80,768	117,370	134,189	130,260	136,214	136,121	130,228	110,012	90,177	79,277	**1,274,965**
Guest House room nights available	5,077	5,187	8,130	10,715	13,301	13,410	13,734	14,263	12,305	10,013	6,152	5,216	**117,503**
Serviced room nights available	66,268	74,345	88,898	128,085	147,490	143,670	149,948	150,384	142,533	120,025	96,329	84,493	**1,392,468**
Other room nights available	7,836	7,417	7,897	8,684	9,541	9,605	10,101	10,101	9,647	8,857	7,279	7,566	**104,531**
Room nights sold in serviced accom	18,370	27,810	41,388	60,597	94,331	108,473	115,861	126,807	111,585	60,990	33,080	27,288	**826,580**
Total room occupancy in serviced	28%	37%	47%	47%	64%	76%	77%	84%	78%	51%	34%	32%	**59%**
Hotel room nights sold	17,248	26,103	38,364	56,926	87,693	100,903	106,469	117,549	104,652	57,307	31,555	26,238	**771,007**
Guest House room nights sold	1,122	1,707	3,024	3,671	6,638	7,570	9,392	9,258	6,933	3,683	1,525	1,050	**55,573**
Hotel room occupancy	28%	38%	47%	49%	65%	77%	78%	86%	80%	52%	35%	33%	**60%**
Guest House room occupancy	22%	33%	37%	34%	50%	56%	68%	65%	56%	37%	25%	20%	**47%**
Other room nights sold	4,172	5,563	6,245	6,028	6,700	7,357	9,040	8,985	7,752	5,020	4,170	4,547	**75,579**
Other room occupancy	53%	75%	79%	69%	70%	77%	89%	89%	80%	57%	57%	60%	**72%**

2013	**Jan**	**Feb**	**Mar**	**Apr**	**May**	**Jun**	**Jul**	**Aug**	**Sep**	**Oct**	**Nov**	**Dec**	**Year**
Room nights available	78,627	82,394	105,411	134,001	157,881	154,155	159,437	159,512	152,849	128,376	102,676	86,460	**1,501,779**
Room nights sold	21,330	30,021	47,412	61,447	102,257	112,340	129,305	138,225	117,262	69,785	36,478	31,222	**897,084**
Room night occupancy	**27%**	**36%**	**45%**	**46%**	**65%**	**73%**	**81%**	**87%**	**77%**	**54%**	**36%**	**36%**	**60%**
Hotel room nights available	65,688	70,134	88,006	114,123	134,882	130,980	135,346	135,346	130,432	108,362	88,154	74,029	**1,275,482**
Guest House room nights available	4,795	5,790	8,959	10,656	13,273	13,230	13,587	13,671	12,623	10,459	6,363	5,183	**118,589**
Serviced room nights available	70,483	75,924	96,965	124,779	148,155	144,210	148,933	149,017	143,055	118,821	94,517	79,212	**1,394,071**
Other room nights available	8,144	6,470	8,446	9,222	9,726	9,945	10,504	10,495	9,794	9,555	8,159	7,248	**107,708**
Room nights sold in serviced accom	18,110	26,352	42,425	56,136	95,591	104,982	120,307	129,030	109,516	63,349	31,674	26,596	**824,068**
Total room occupancy in serviced	26%	35%	44%	45%	65%	73%	81%	87%	77%	53%	34%	34%	**59%**
Hotel room nights sold	17,174	25,364	39,898	52,705	89,543	98,048	111,636	119,772	103,121	59,660	30,230	25,440	**772,591**
Guest House room nights sold	936	988	2,527	3,431	6,048	6,934	8,671	9,258	6,395	3,689	1,444	1,156	**51,477**
Hotel room occupancy	26%	36%	45%	46%	66%	75%	82%	88%	79%	55%	34%	34%	**61%**
Guest House room occupancy	20%	17%	28%	32%	46%	52%	64%	68%	51%	35%	23%	22%	**43%**
Other room nights sold	3,220	3,669	4,987	5,311	6,666	7,358	8,998	9,195	7,746	6,436	4,804	4,626	**73,016**
Other room occupancy	40%	57%	59%	58%	69%	74%	86%	88%	79%	67%	59%	64%	**68%**

Appendix 12

Jersey Link - Jersey Tourism Central Reservations 2009-2013

		Bookings	Bednights	Revenue	Value per Bednight
2009	January	252	2,615	£91,952	£35.16
	February	334	2,684	£97,397	£36.29
	March	368	2,930	£111,629	£38.10
	April	485	3,825	£151,689	£39.66
	May	565	4,158	£168,120	£40.43
	June	553	3,921	£168,376	£42.94
	July	602	4,251	£180,886	£42.55
	August	568	3,396	£144,377	£42.51
	September	372	2,068	£76,514	£37.00
	October	144	806	£25,820	£32.03
	November	104	589	£19,573	£33.23
	December	91	454	£14,531	£32.01
	Total	**4,349**	**30,441**	**£1,145,546**	**£37.63**
2010	January	213	1,954	£68,186	£34.90
	February	257	1,925	£67,602	£35.12
	March	442	3,338	£120,484	£36.09
	April	444	3,156	£115,553	£36.61
	May	411	2,787	£108,261	£38.84
	June	507	3,352	£135,824	£40.52
	July	697	4,601	£193,504	£42.06
	August	542	3,079	£127,405	£41.38
	September	328	1,682	£59,961	£35.65
	October	139	792	£29,314	£37.01
	November	114	657	£23,730	£36.12
	December	68	329	£12,813	£38.95
	Total	**4,132**	**27,273**	**£1,049,322**	**£38.47**
2011	January	260	2,504	£93,810	£37.46
	February	285	2,459	£86,732	£35.27
	March	355	2,666	£104,334	£39.14
	April	365	2,386	£92,541	£38.78
	May	540	3,680	£152,603	£41.47
	June	493	3,365	£144,649	£42.99
	July	620	4,127	£182,336	£44.18
	August	529	3,419	£146,542	£42.86
	September	298	1,364	£51,578	£37.81
	October	92	591	£20,574	£34.81
	November	79	474	£18,194	£38.38
	December	61	510	£21,269	£41.70
	Total	**3,948**	**27,194**	**£1,099,175**	**£40.49**
2012	January	226	2,037	£78,804	£38.69
	February	189	1,652	£65,057	£39.38
	March	272	2,103	£81,966	£38.98
	April	306	2,263	£95,363	£42.14
	May	311	2,307	£87,995	£38.14
	June	311	2,065	£86,067	£41.68
	July	376	2,836	£116,817	£41.19
	August	389	2,398	£102,817	£42.88
	September	209	1,199	£45,227	£37.72
	October	122	636	£21,610	£33.98
	November	104	776	£25,588	£32.97
	December	80	564	£23,288	£41.29
	Total	**2,895**	**20,836**	**£ 830,599**	**£39.86**
2013	January	196	2208	£ 87,177	£ 39.48
	February	184	1899	£ 72,088	£ 37.96
	March	263	2256	£ 92,763	£ 41.12
	April	326	2742	£ 105,518	£ 38.48
	May	285	2059	£ 78,830	£ 38.29
	June	318	2258	£ 92,840	£ 41.12
	July	356	2435	£ 99,785	£ 40.98
	August	330	2065	£ 78,530	£ 38.03
	September	161	1011	£ 38,660	£ 38.24
	October	100	612	£ 21,017	£ 34.34
	November	66	434	£ 15,526	£ 35.77
	December	54	529	£ 15,988	£ 30.22
	Total	**2639**	**20508**	**£ 798,722**	**£ 38.95**
	2013 vs. 2012	-9%	-2%	-4%	-2%

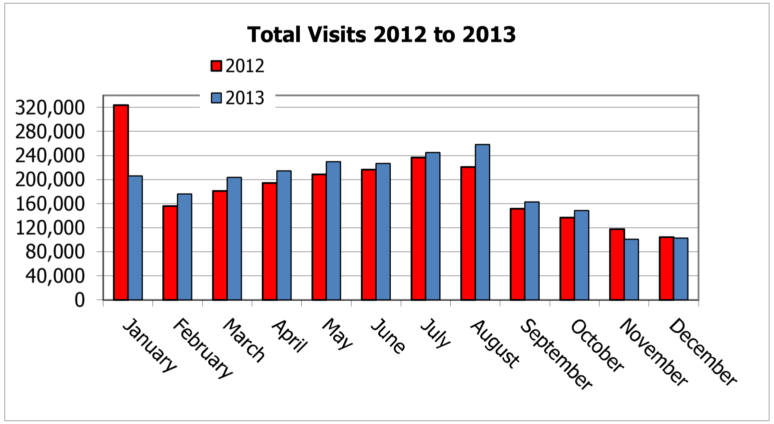
N.B. This data is collated based on monthly reports. Any booking modifications made after the release of these figures will have slightly altered the actual achieved data that is reported on in section 5.1 of the report. The yearly totals above include the adjustments.

Appendix 13.1

Visits to www.jersey.com, 2009 - 2013

	2009	2010	2011	2012	2013
January	133,488	105,749	145,846	323,963	206,037
February	100,419	105,249	119,739	156,196	175,943
March	116,726	125,271	140,532	181,010	203482
April	131,164	120,640	152,430	194,387	214709
May	139,506	131,082	190,556	208,798	229711
June	138,809	136,978	197,386	216,700	227061
July	155,626	188,311	208,874	236,774	245082
August	123,990	162,627	211,469	221,043	258258
September	90,271	121,632	142,766	151,613	162686
October	61,126	96,894	197,729	136,941	148674
November	49,174	80,748	163,300	117,449	100,920
December	47,420	76,693	155,112	104,392	102808
Total	**1,287,719**	**1,451,874**	**2,025,739**	**2,249,266**	**2,275,371**

source: Google Analytics



Appendix 13.2

Visits to www.jersey.com by country of residence

	UK					France					Germany				
	2009	**2010**	**2011**	**2012**	**2013**	**2009**	**2010**	**2011**	**2012**	**2013**	**2009**	**2010**	**2011**	**2012**	**2013**
January	96,305	63,936	91,060	226,010	122,268	6,228	7,779	11,739	26,796	16,242	4,412	4,976	7,121	12,452	12,189
February	60,089	58,870	66,040	84,153	96,226	8,826	11,233	15,448	22,011	20,924	8,480	7,520	4,861	7,514	9,175
March	69,625	71,914	74,219	96,784	105,946	12,498	15,098	19,099	28,141	25,119	9,493	6,661	5,914	7,469	9,086
April	77,990	60,769	72,465	99,028	117,834	17,426	18,723	31,816	35,361	31,062	6,094	6,698	5,101	8,185	8,976
May	84,225	66,734	99,278	111,347	129,559	15,777	19,926	30,380	28,529	27,460	8,321	8,154	6,726	7,023	8,794
June	85,851	72,429	100,238	113,781	129,102	12,184	20,189	26,257	29,049	21,117	6,009	6,944	19,311	7,936	9,280
July	90,011	105,932	110,072	128,623	135,545	20,362	29,514	33,331	28,874	28,307	6,039	6,610	8,189	8,678	8,504
August	73,718	87,866	107,026	115,524	140,278	12,852	22,893	30,723	28,181	30,028	4,678	5,379	6,739	8,318	11,015
September	50,044	66,206	70,998	79,385	88,457	9,550	13,182	20,554	16,173	17,757	3,144	3,756	4,203	4,431	5,326
October	26,365	44,963	104,412	63,893	70,731	9,799	14,112	30,217	17,983	17,186	2,723	2,915	6,440	3,914	4,144
November	18,179	34,003	84,540	50,483	38,536	6,493	11,615	18,997	10,773	10,591	2,485	2,920	7,322	4,681	4,369
December	17,211	32,257	80,911	41,463	44,672	6,298	11,414	17,395	11,015	10,567	2,670	2,604	9,919	9,197	3,707
Total	**749,613**	**765,879**	**1,061,259**	**1,210,474**	**1,219,154**	**138,293**	**195,678**	**285,956**	**282,886**	**256,360**	**64,548**	**65,137**	**91,846**	**89,798**	**94,565**

Source: Google Analytics

Appendix 14.1

Total Passenger Arrivals 2009 - 2013

	TOTAL AIR ARRIVALS					TOTAL SEA ARRIVALS					TOTAL ARRIVALS				
	2009	2010	2011	2012	2013	2009	2010	2011	2012	2013	2009	2010	2011	2012	2013
JAN	39,895	35,659	38,680	39,735	37,156	6,800	7,432	8,138	7,905	7,133	46,695	43,091	46,818	47,640	44,289
FEB	42,565	42,376	41,755	39,339	42,600	9,002	9,559	10,660	11,022	8,511	51,567	51,935	52,415	50,361	51,111
MAR	52,914	52,865	50,441	53,117	50,494	11,686	12,350	14,804	15,590	15,272	64,600	65,215	65,245	68,707	65,766
APR	60,142	49,284	61,139	59,965	57,207	34,125	37,803	38,752	33,361	31,423	94,267	87,087	99,891	93,326	88,630
MAY	71,399	69,284	69,560	67,386	69,693	45,058	44,835	44,045	41,713	46,507	116,457	114,119	113,605	109,099	116,200
JUN	72,778	74,339	74,559	76,292	72,475	45,537	46,485	48,894	46,871	47,326	118,315	120,824	123,453	123,163	119,801
JUL	80,546	82,698	83,719	78,031	78,445	54,045	56,241	59,002	49,555	53,211	134,591	138,939	142,721	127,586	131,656
AUG	84,332	86,408	84,381	84,069	83,320	75,513	76,363	72,343	65,171	72,590	159,845	162,771	156,724	149,240	155,910
SEP	72,714	74,003	74,081	72,189	69,223	42,786	43,253	43,100	45,087	44,575	115,500	117,256	117,181	117,276	113,798
OCT	61,009	64,331	63,617	58,448	61,236	22,766	22,354	32,203	22,511	24,116	83,775	86,685	95,820	80,959	85,352
NOV	49,047	47,220	46,662	50,213	49,428	7,676	8,629	9,359	11,700	9,429	56,723	55,849	56,021	61,913	58,857
DEC	46,481	41,782	47,000	47,375	47,716	10,690	12,455	11,677	11,401	11,849	57,171	54,237	58,677	58,776	59,565
SUMMER	164,878	169,106	168,100	162,100	161,765	129,558	132,604	131,345	114,726	125,801	294,436	301,710	299,445	276,826	287,566
SPRING	204,319	192,907	205,258	203,643	199,375	124,720	129,123	131,691	121,945	125,256	329,039	322,030	336,949	325,588	324,631
AUTUMN	133,723	138,334	137,698	130,637	130,459	65,552	65,607	75,303	67,598	68,691	199,275	203,941	213,001	198,235	199,150
WINTER	230,902	219,902	224,538	229,779	227,394	45,854	50,425	54,638	57,618	52,194	276,756	270,327	279,176	287,397	279,588
YEAR	**733,822**	**720,249**	**735,594**	**726,159**	**718,993**	**365,684**	**377,759**	**392,977**	**361,887**	**371,942**	**1,099,506**	**1,098,008**	**1,128,571**	**1,088,046**	**1,090,935**

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 14.2

Passenger Arrivals from the UK 2009 - 2013

	TOTAL UK AIR ARRIVALS					TOTAL UK SEA ARRIVALS					TOTAL UK ARRIVALS				
	2009	2010	2011	2012	2013	2009	2010	2011	2012	2013	2009	2010	2011	2012	2013
JAN	32,077	29,064	31,864	32,363	30,261	1,337	1,664	1,982	1,838	1,718	33,414	30,728	33,846	34,201	31,979
FEB	34,985	35,193	35,120	32,672	35,253	1,753	2,454	2,372	2,714	1,856	36,738	37,647	37,492	35,386	37,109
MAR	44,470	43,912	41,808	44,573	42,676	3,401	3,335	3,171	3,505	4,096	47,871	47,247	44,979	48,078	46,772
APR	50,513	41,125	51,859	51,591	48,707	8,523	11,591	9,884	8,242	7,955	59,036	52,716	61,743	59,833	56,662
MAY	61,135	58,428	59,271	56,741	58,991	10,186	10,105	10,357	8,866	11,144	71,321	68,533	69,628	65,607	70,135
JUN	61,667	62,999	63,169	65,428	61,037	11,093	9,343	11,229	10,462	10,301	72,760	72,342	74,398	75,890	71,338
JUL	68,830	70,529	71,845	66,291	66,880	14,117	12,858	15,416	12,123	13,770	82,947	83,387	87,261	78,414	80,650
AUG	73,262	75,260	73,118	72,851	71,060	19,859	18,757	20,205	16,405	18,204	93,121	94,017	93,323	89,256	89,264
SEP	62,334	62,649	63,382	61,859	59,742	10,785	10,105	10,771	11,502	10,583	73,119	72,754	74,153	73,361	70,325
OCT	52,587	54,404	54,349	50,568	51,912	7,435	7,586	8,802	6,753	5,962	60,022	61,990	63,151	57,321	57,874
NOV	40,675	39,460	38,570	42,646	41,361	2,259	2,475	2,372	2,971	2,667	42,934	41,935	40,942	45,617	44,028
DEC	39,959	36,211	40,437	41,646	40,839	2,474	3,439	3,042	2,680	2,501	42,433	39,650	43,479	44,326	43,340
SUMMER	142,092	145,789	144,963	139,142	137,940	33,976	31,615	35,621	28,528	31,974	176,068	177,404	180,584	167,670	169,914
SPRING	173,315	162,552	174,299	173,760	168,735	29,802	31,039	31,470	27,570	29,400	203,117	193,591	205,769	201,330	198,135
AUTUMN	114,921	117,053	117,731	112,427	111,654	18,220	17,691	19,573	18,255	16,545	133,141	134,744	137,304	130,682	128,199
WINTER	192,166	183,840	187,799	193,900	190,390	11,224	13,367	12,939	13,708	12,838	203,390	197,207	200,738	207,608	203,228
YEAR	**622,494**	**609,234**	**624,792**	**619,229**	**608,719**	**93,222**	**93,712**	**99,603**	**88,061**	**90,757**	**715,716**	**702,946**	**724,395**	**707,290**	**699,476**

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 affected 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 14.3

Inter-Island Passenger Arrivals 2009 - 2013

	TOTAL INTER-ISLAND AIR ARRIVALS					TOTAL INTER-ISLAND SEA ARRIVALS					TOTAL INTER-ISLAND ARRIVALS				
	2009	2010	2011	2012	2013	2009	2010	2011	2012	2013	2009	2010	2011	2012	2013
JAN	5,095	4,275	4,904	5,368	4,584	261	473	550	481	449	5,356	4,748	5,454	5,849	5,033
FEB	5,396	5,376	5,523	5,171	5,511	827	578	1,241	1,506	746	6,223	5,954	6,764	6,677	6,257
MAR	6,589	7,612	7,510	6,663	6,086	917	987	1,561	1,855	1,479	7,506	8,599	9,071	8,518	7,565
APR	5,705	5,644	6,074	5,824	5,489	4,063	3,005	5,631	4,939	4,612	9,768	8,649	11,705	10,763	10,101
MAY	5,635	6,360	6,693	6,079	6,090	7,259	7,148	7,651	8,066	8,213	12,894	13,508	14,344	14,145	14,303
JUN	7,023	6,534	7,027	5,839	6,043	6,440	5,690	7,141	7,488	8,852	13,463	12,224	14,168	13,327	14,895
JUL	6,221	6,587	6,749	6,749	5,735	8,994	8,507	11,533	8,298	10,111	15,215	15,094	18,282	15,047	15,846
AUG	5,313	5,760	5,801	5,723	5,570	12,943	12,221	13,660	11,696	13,300	18,256	17,981	19,461	17,419	18,870
SEP	6,564	7,012	6,888	6,284	5,893	6,210	6,400	7,487	6,861	8,359	12,774	13,412	14,375	13,145	14,252
OCT	6,694	7,020	6,756	5,832	6,778	2,383	2,897	6,369	3,783	4,199	9,077	9,917	13,125	9,615	10,977
NOV	7,131	6,801	7,403	6,371	6,591	706	1,236	1,775	1,304	1,200	7,837	8,037	9,178	7,675	7,791
DEC	5,385	4,592	5,441	4,709	5,272	1,504	1,987	1,818	1,904	1,518	6,889	6,579	7,259	6,613	6,790
SUMMER	11,534	12,347	12,550	12,472	11,305	21,937	20,728	25,193	19,994	23,411	33,471	33,075	37,743	32,466	34,716
SPRING	18,363	18,538	19,794	17,742	17,622	17,762	15,843	20,423	20,493	21,677	36,125	34,381	40,217	38,235	39,299
AUTUMN	13,258	14,032	13,644	12,116	12,671	8,593	9,297	13,856	10,644	12,558	21,851	23,329	27,500	22,760	25,229
WINTER	29,596	28,656	30,781	28,282	28,044	4,215	5,261	6,945	7,050	5,392	33,811	33,917	37,726	35,332	33,436
YEAR	**72,751**	**73,573**	**76,769**	**70,612**	**69,642**	**52,507**	**51,129**	**66,417**	**58,181**	**63,038**	**125,258**	**124,702**	**143,186**	**128,793**	**132,680**

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 14.4

Continental Passenger Arrivals 2009 - 2013

	TOTAL CONTINENTAL AIR ARRIVALS					TOTAL CONTINENTAL SEA ARRIVALS					TOTAL CONTINENTAL ARRIVALS				
	2009	2010	2011	2012	2013	2009	2010	2011	2012	2013	2009	2010	2011	2012	2013
JAN	2,723	2,320	1,912	2,004	2,311	5,202	5,295	5,606	5,586	4,966	7,925	7,615	7,518	7,590	7,277
FEB	2,184	1,807	1,112	1,496	1,836	6,422	6,527	7,047	6,802	5,909	8,606	8,334	8,159	8,298	7,745
MAR	1,855	1,341	1,123	1,881	1,732	7,368	8,028	10,072	10,230	9,697	9,223	9,369	11,195	12,111	11,429
APR	3,924	2,515	3,206	2,550	3,011	21,539	23,207	23,237	20,180	18,856	25,463	25,722	26,443	22,730	21,867
MAY	4,629	4,496	3,596	4,566	4,612	27,613	27,582	26,037	24,781	27,150	32,242	32,078	29,633	29,347	31,762
JUN	4,088	4,806	4,363	5,025	5,395	28,004	31,452	30,524	28,921	28,173	32,092	36,258	34,887	33,946	33,568
JUL	5,495	5,582	5,125	4,991	5,830	30,934	34,876	32,053	29,134	29,330	36,429	40,458	37,178	34,125	35,160
AUG	5,757	5,388	5,462	5,495	6,690	42,711	45,385	38,478	37,067	41,086	48,468	50,773	43,940	42,562	47,776
SEP	3,816	4,342	3,811	4,046	3,588	25,791	26,748	24,842	26,727	25,633	29,607	31,090	28,653	30,773	29,221
OCT	1,728	2,907	2,512	2,048	2,546	12,948	11,871	17,032	11,975	13,955	14,676	14,778	19,544	14,023	16,501
NOV	1,241	959	689	1,196	1,476	4,711	4,918	5,212	7,425	5,562	5,952	5,877	5,901	8,621	7,038
DEC	1,137	979	1,122	1,020	1,605	6,712	7,029	6,817	6,817	7,830	7,849	8,008	7,939	7,837	9,435
SUMMER	11,252	10,970	10,587	10,486	12,520	73,645	80,261	70,531	66,201	70,416	84,897	91,231	81,118	76,687	82,936
SPRING	12,641	11,817	11,165	12,141	13,018	77,156	82,241	79,798	73,882	74,179	89,797	94,058	90,963	86,023	87,197
AUTUMN	5,544	7,249	6,323	6,094	6,134	38,739	38,619	41,874	38,702	39,588	44,283	45,868	48,197	44,796	45,722
WINTER	9,140	7,406	5,958	7,597	8,960	30,415	31,797	34,754	36,860	33,964	39,555	39,203	40,712	44,457	42,924
YEAR	**38,577**	**37,442**	**34,033**	**36,318**	**40,632**	**219,955**	**232,918**	**226,957**	**215,645**	**218,147**	**258,532**	**270,360**	**260,990**	**251,963**	**258,779**

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.
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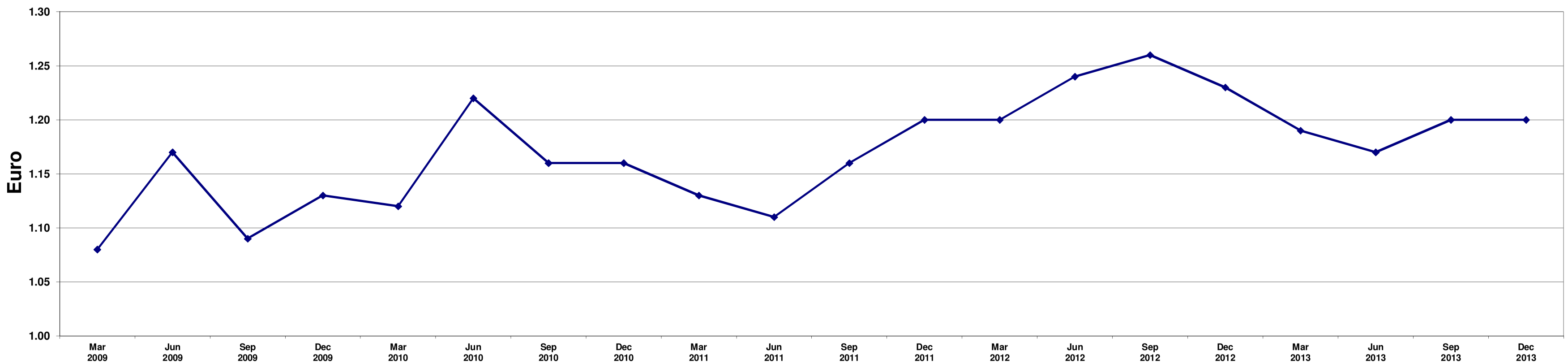
Appendix 15

Selected exchange rates against sterling since March 2009

		Den	Nor	Swe	Swz	Euro	USA	Can	Aus	Japan
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	158.90
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
2011	Mar	8.44	8.88	10.13	1.47	1.13	1.60	1.56	1.55	132.95
2011	Jun	8.25	8.63	10.13	1.35	1.11	1.61	1.55	1.50	129.57
2011	Sep	8.65	9.13	10.66	1.41	1.16	1.56	1.62	1.60	120.35
2011	Dec	8.90	9.28	10.72	1.46	1.20	1.55	1.59	1.52	119.71
2012	Mar	8.93	9.12	10.59	1.44	1.20	1.60	1.60	1.55	132.70
2012	Jun	9.22	9.36	10.87	1.49	1.24	1.57	1.60	1.53	125.37
2012	Sep	9.37	9.26	10.61	1.52	1.26	1.61	1.59	1.56	126.05
2012	Dec	9.20	9.09	10.66	1.48	1.23	1.60	1.59	1.54	132.10
2013	Mar	8.84	8.89	9.92	1.44	1.19	1.60	1.60	1.55	132.70
2013	Jun	8.72	9.23	10.19	1.44	1.17	1.57	1.60	1.53	125.37
2013	Sep	8.93	9.70	10.41	1.46	1.20	1.61	1.59	1.56	126.05
2013	Dec	8.92	10.03	10.59	1.46	1.20	1.60	1.59	1.54	132.10

£ Sterling vs. Euro 2009 - 2013



Appendix 16

SUNSHINE (hours) FORT REGENT Signal Station							
	2009	2010	2011	2012	2013	2009 to 2013 ave.	1981 to 2013 ave.
Jan	102.4	87.4	88.9	78.3	55.0	82.4	71.3
Feb	107.3	106.4	87.8	104.6	109.3	103.1	97.1
Mar	241.1	193.2	190.1	228.4	141.5	198.9	143.8
Apr	217.3	320.2	282.4	253.5	231.1	260.9	208.3
May	271.1	290.2	300.8	267.6	231.0	272.1	243.9
Jun	301.9	339.2	257.1	211.2	229.9	267.9	254.5
Jul	279.0	302.9	283.6	260.5	337.9	292.8	266.4
Aug	234.7	229.4	237.9	271.1	306.8	256.0	246.7
Sep	243.8	224.0	213.0	219.8	178.0	215.7	193.5
Oct	120.9	137.3	137.5	106.4	152.6	130.9	125.0
Nov	77.6	96.2	105.1	104.2	63.6	89.3	85.7
Dec	89.0	76.9	51.6	75.5	89.9	76.6	67.6
Year	2286.1	2403.3	2235.8	2181.1	2126.6	2246.6	2003.8

RAINFALL (mm) MAISON ST LOUIS Observatory							
	2009	2010	2011	2012	2013	2009 to 2013 ave.	1981 to 2013 ave.
Jan	99.4	93.9	53.8	56.6	123.4	85.4	91.1
Feb	46.6	123.3	72.2	24.0	67.9	66.8	69.4
Mar	45.0	30.9	27.6	30.4	147.0	56.2	69.3
Apr	62.7	14.0	0.2	112.8	55.8	49.1	56.2
May	40.5	39.4	18.0	69.8	67.1	47.0	54.4
Jun	46.3	44.6	44.8	91.6	23.5	50.2	48.7
Jul	44.2	30.8	91.8	58.2	34.4	51.9	45.8
Aug	22.7	101.0	43.0	67.0	23.6	51.5	50.7
Sep	23.3	53.5	66.0	63.8	46.9	50.7	62.3
Oct	73.4	124.3	40.2	176.1	134.6	109.7	105.8
Nov	216.3	192.4	27.0	132.0	148.7	143.3	105.9
Dec	107.9	109.4	247.4	202.8	119.4	157.4	120.6
Year	828.3	957.5	732.0	1085.1	992.3	919.0	880.2

RAIN DAYS (0.2 mm or more) MAISON ST LOUIS Observatory							
	2009	2010	2011	2012	2013	2009 to 2013 ave.	1981 to 2013 ave.
Jan	21	22	16	21	26	21.2	19.5
Feb	11	22	21	13	17	16.8	15.6
Mar	13	13	8	10	18	12.4	15.7
Apr	18	5	1	19	16	11.8	13.7
May	16	11	8	14	16	13.0	12.8
Jun	8	6	14	22	13	12.6	10.8
Jul	17	14	13	14	9	13.4	11.4
Aug	7	17	16	15	12	13.4	11.2
Sep	6	10	14	13	15	11.6	12.5
Oct	16	20	19	26	25	21.2	18.7
Nov	27	25	14	22	22	22.0	19.5
Dec	24	15	23	27	24	22.6	19.9
Year	184	180	167	216	213	192.0	181.3

MEAN DAILY AIR TEMPERATURE (Degrees Celsius) MAISON ST LOUIS Observatory							
	2009	2010	2011	2012	2013	2009 to 2013 ave.	1981 to 2013 ave.
Jan	4.5	4.4	6.6	8.3	6.3	6.0	6.6
Feb	6.1	6.0	8.5	5.7	5.3	6.3	6.5
Mar	8.8	7.8	9.0	10.3	6.1	8.4	8.5
Apr	11.2	11.3	13.8	9.7	9.2	11.0	10.4
May	13.5	13.0	14.0	13.3	12.0	13.2	13.4
Jun	16.8	16.7	15.6	16.1	14.7	16.0	16.0
Jul	18.1	18.7	17.0	18.1	19.2	18.2	18.1
Aug	18.3	17.5	17.5	18.6	18.7	18.1	18.3
Sep	16.8	16.1	17.5	15.7	16.6	16.5	16.5
Oct	14.2	13.6	14.6	13.3	14.9	14.1	13.5
Nov	11.4	9.0	12.4	9.4	9.6	10.4	10.0
Dec	6.9	4.2	9.0	8.3	8.5	7.4	7.4
Year	12.2	11.5	13.0	12.2	11.8	12.1	12.1

Appendix 17

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

FIRST ADULT (16+) (full name and nationality must be completed for all adults within a room)

Surname

Forename

Title (Mr/s etc.) — Date of birth DD MM 19YY

Nationality

SECOND ADULT (16+)

Surname

Forename

Nationality

THIRD ADULT (16+)

Surname

Forename

Nationality

FOURTH ADULT (16+)

Surname

Forename

Nationality

ARRIVAL DATE DD MM 20YY

DEPARTURE DATE DD MM 20YY

MAIN PURPOSE OF VISIT (First adult only) Holiday ☐ Sport ☐ Business ☐ Conference ☐ Other ☐

COUNTRY OF RESIDENCE (First adult only) U.K. ☐ Ireland ☐ Jersey ☐ Other C.I. ☐ Other (please state)

HOME ADDRESS

House No. Postcode

House Address

WHEN DID YOU BOOK YOUR VISIT?
Less than 1 month ago ☐ 1-3 months ago ☐ More than 3 months ago ☐

DID YOU BOOK YOUR ACCOMMODATION DIRECT WITH THE ESTABLISHMENT?
No ☐ Yes ☐

HOW DID YOU TRAVEL TO JERSEY?
By air ☐ By sea ☐

HAVE YOU VISITED JERSEY BEFORE?
No ☐ Yes ☐

SIGNATURE

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

JERSEY

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

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