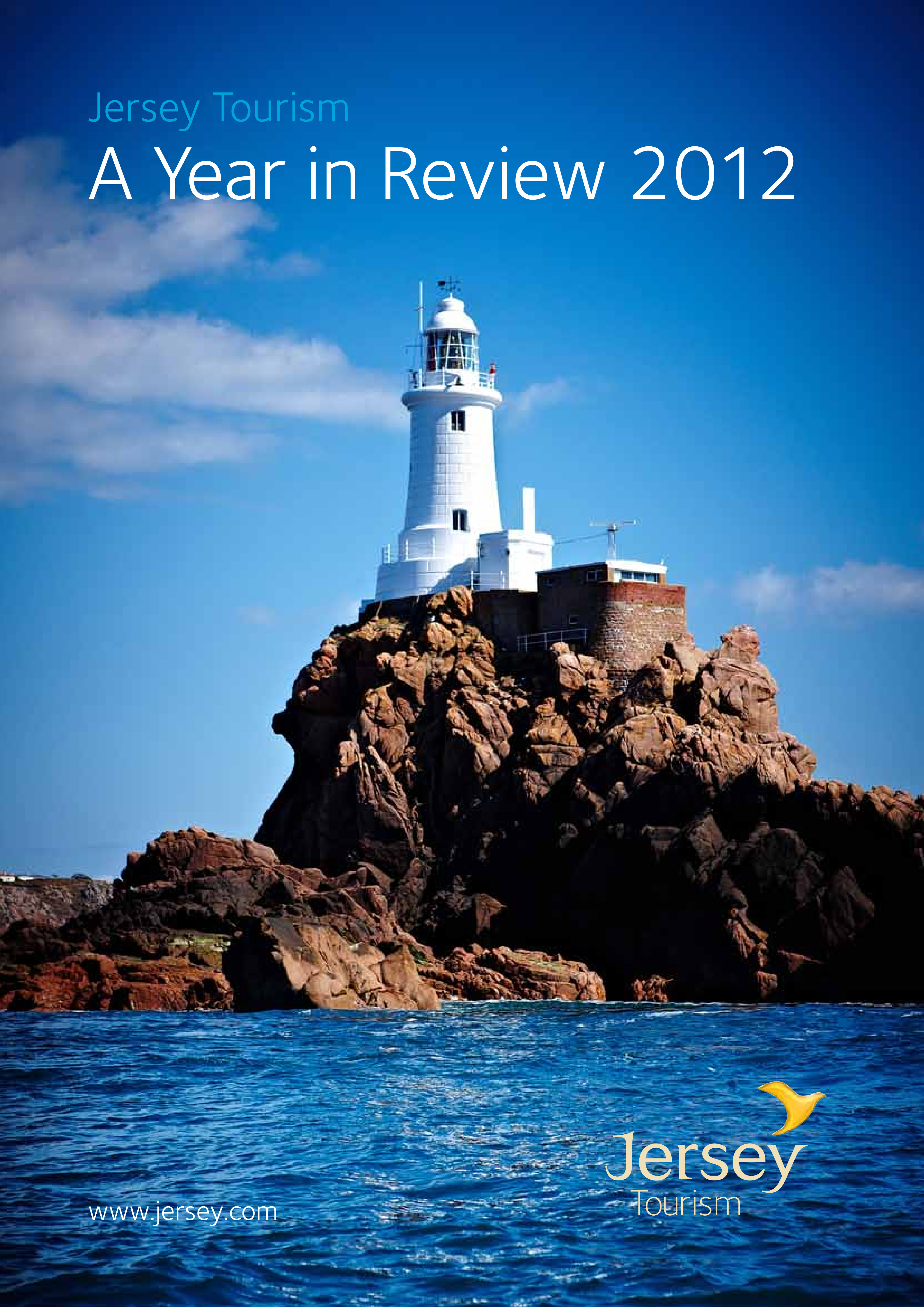
Jersey Tourism

A Year in Review 2012



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Jersey Tourism

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Foreword from the Minister for Economic Development

The tourism industry in Jersey performed well in 2012 against the background of external factors and difficult trading conditions. In the UK, our main source market, several major events compounded the difficulty of operating with the financial pressure which we and indeed all destinations have now been experiencing for a number of years. The Queen's Jubilee celebrations, the Olympic and Paralympic Games and the European Football championships were all major distractions which affected consumer holiday decisions and all occurred in short order during the early and mid summer period making trading conditions for the industry even more challenging than otherwise they might have been.

The final result for staying leisure visitors showed a decline in volume of 1.9% and an increase of 5.8% for staying business visitors. These figures contributed to an overall reduction in volume of 1.7% and an on Island expenditure of nearly £230m. Continental Europe produced a mixed performance with notable further growth in Germany of some 6% but a reduction of 8% from France. The Scandinavian region demonstrated some growth potential following the introduction of a charter series from Norway.

Europe however still presents Jersey with a significant growth opportunity which can be exploited if carriers can be persuaded to provide the direct transport links which are essential to market development. We will continue to support the new opportunities which are presented both with incentives to the carriers and with marketing support through the travel trade.

I sincerely hope that the measures which we have taken in 2012, including financial incentives to encourage more local people to work in the industry will be successful. This is important for the Jersey economy, and is also good for visitors who will benefit from engaging more with local residents during their stay.

The Tourism Department has continued to benefit significantly from the input by private sector representatives who have contributed time, energy, and expertise to the Tourism Development Panel, The Tourism Marketing Panel and the Jersey Conference Bureau during the year. We are particularly grateful to those who have served in an honorary capacity for the overall good of the industry. During 2013, involvement by the private sector members will be enhanced with the introduction of the Tourism Shadow Board whose first task will be to advise on the development of future strategy following the publication of the Oxera Economic Study and the Green consultation paper which was placed in the public domain during the Summer of 2012.

Jersey continues to provide many leisure activities and entertainments for visitors and local residents which are much appreciated as they increase the level of enjoyment to enhance the visitors stay and create reasons for them to come in the first place. These all help to supplement the natural attractions of our beautiful Island.

Many are provided commercially by the private sector organisations and often through the efforts of many volunteers who give tirelessly of their time to benefit the Island. The International Air Display and the Jersey Battle of Flowers are both excellent examples of the latter and I would like to offer my sincere thanks to all who contribute to the success of these and other events.

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

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

Senator Alan Maclean
Minister for Economic Development

2012 Annual Report

Transportation

Jersey received 1.089m passengers through the Ports in 2012, of which 362k roughly one third travelled by sea and 726k by air.

As an island destination we are totally reliant upon the transport services and therefore significant efforts are made by the Ports of Jersey and Jersey Tourism to secure new services and to maximise the volumes of passengers generated.

There are however many external factors which affect the provision of these services which are outside of the control of the Island including Air Passenger Duty which has been steadily increasing thereby increasing the cost of air travel. Through Economic Development, investment has been made in the development of new routes in both the UK and Europe where it has been necessary to provide stimulus to generate the new services.

Of particular note during the year were:

- The London group of airports accounted for 11,500 additional passengers due mainly to increases on London City and Southend.
- 50% of all air passengers arrive from the London catchment area.
- East Midlands and Manchester declined in the wake of the cessation of Bmibaby services.
- The closure of Weymouth harbour for remedial work had a significant affect on volumes by sea from the UK South Coast.
- The tour operator charter from Oslo opened the Norwegian market.
- German air figures were boosted by new charter services from Hamburg and Munich.
- France sea passenger numbers showed a decline for the second year in succession following strong growth in 2010.

Consultation results

An industry wide consultation was carried out in the form of a self completion questionnaire to enable a broad section of views to be gathered prior to the preparation of a new Tourism Strategy.

The following are the top line results which were received in response to the key priority questions.

Priority 1

- **88% of all respondents believed that Jersey should be developed into a year round Staying Leisure visitor economy, 11% disagreed.**

Specific policy responses

- 80% agreed that future strategies should be prioritised to grow the off peak season, whilst maintaining high season numbers.
- 96% agreed that the future event programme should be prioritised towards activity which will demonstrate ability to attract additional visitors.
- 71% agreed that all on Island events should be reviewed and that non essential investment should be redirected to the off peak.
- 83% agreed that all States bodies should be aligned to policies which develop a stronger year round visitor economy.
- 90% agreed that government should invest in partnerships and joint ventures with industry bodies to enhance off peak business.
- 91% agreed that Government should invest further in market segments which are not related to high season such as conferences and sports.

Priority 2

- 89% agreed that increased value should be generated from the Staying Leisure Visitor Economy, 5% disagreed.

Specific Policy responses

- 88% agreed that Government should identify and target a new proposition to attract higher value source market clients.
- 77% agreed that public sector investment should be aligned to the enhancement of quality of service which would result in higher productivity and revenues.
- 65% agreed that Governments future product investment be aligned to improving new or existing products rather than maintaining existing lower value products.
- 44% agreed that Government should develop policies to allow for lower value operations and or products to exit the market by encouraging future investment in new higher value activity, 36% disagreed.
- 78% agreed that Government should, through a business engagement programme, develop a tourism specific initiative to report on business performance.
- 67% agreed that Government's future route development be targeted to new higher value markets.

Priority 3

- 75% agreed that the number of locals employed in the sector should be increased, 12% disagreed.

Specific Policy responses

- 84% agreed that industry awareness and image should be developed in schools and colleges.
- 85% agreed that Government should improve employment gateways through traineeships and apprenticeships.
- 97% agreed that career progression should be achieved through a Hospitality Management programme.
- 91% agreed that an international exchange programme should be developed with an hotel group.
- 60% agreed that work should be undertaken with the population office to increase the percentage of locally qualified licences under the Regulation of Undertakings Law.

Priority 4

- 89% agreed that investments within the staying leisure visitor economy should be maximised, 5% disagreed.

Specific Policy responses

- 79% thought that the Government's future public sector investment strategy should be targeted towards developing the Staying Leisure Visitor economy.
- 67% agreed that Government should embrace technology and digital advances and move away from paper and printed material.
- 86% agreed that the eligibility criteria of the Tourism Development Fund should be aligned to the priorities and policies of the new Tourism strategy.
- 67% agreed that Government should have more timely monitoring and reporting on business performance.

N. Europe and other emerging markets

Identifying and growing new source markets is a priority for the tourism industry in Jersey. However this is not easily achieved in a highly competitive industry in which consumer recognition can take both time and a significant investment. In Germany which is currently the best performing market in terms of growth the trade network has been in place for many years and consumer marketing has been undertaken on an annual basis.

A key determinant of whether a market can be developed is the availability of convenient transport. New services into Amsterdam and Paris operating on a year round basis are crucial to market development within the Paris catchment area and in Holland and Belgium. The charter series which started from Oslo in 2012 is set to continue but all of these opportunities will require new marketing support if they are going to grow and be successful.

During 2012 Jersey made its first overseas marketing mission to one of the BRIC countries with a visit to China in association with Economic Development and private sector representatives. This was essentially a fact finding initiative which took advantage of Jersey Government investment in the country coupled with high ranking contacts. Work will continue in the Chinese market with a Chinese language website and through inviting trade contacts to the Island for familiarisation visits.

The Russian market has also been identified as having potential and a joint venture with a Jersey based ground handler is producing some early results in that market. It will be a slow development working through the channels of Visitbritain who provide a number of marketing opportunities in the region.

However the most likely area for future growth will be Northern Europe including Scandinavia where there is an existing brand awareness for Jersey and from which flying programmes are likely to be practical. Several years ago significant numbers of visitors were attracted from both Norway and Sweden and recent market analysis would suggest that there is some growth potential which could be exploited if resources could be made available.

The USA also has some potential for regular visitors to Britain who are seeking to explore further than the usual cities such as London and Edinburgh. In these new markets there is an option to work with the other agencies which are promoting the Island for finance and relocation.

Destination Jersey - Travel Trade Workshop

Destination Jersey was held over three days starting with a welcome dinner at the Jersey War Tunnels on Monday and concluding with a half day tour of the Island with lunch at the Radisson Blu Waterfront Hotel on Wednesday.

The Destination Jersey Workshop was held on Tuesday 15th May, with over 70 tour operators from Austria, Belgium, France, Germany, Netherlands, Norway, Switzerland and the UK and around 120 local suppliers participating in a total of 1,530 appointments. This proved an extremely effective event for tour operators to meet with key suppliers to develop programmes, receive prices, find new package suggestions, gather events information and discuss allocations.

There were also opportunities to develop working relationships throughout the three day event, whilst discovering the unique character of Jersey and its food and entertainment.

David de Carteret
Director of Tourism & Marketing

Marketing Review 2012

Introduction

Planning the 2012 UK campaign had to take into account the massive impact that events can have on travel. As 2012 dawned, the UK media was full of British patriotism for the Queen's Diamond Jubilee in June, which included an extra bank holiday. The hype for London 2012 Olympics, the greatest show on earth, would dominate the summer, added to this, the European Cup Football Championship kicked off on 8th June.

The first hurdle was to plan and anticipate the media landscape, which was likely to have large swings in prices, as the major brands came into the market to capture inflated audiences due to these events. From the beginning of June, when the Queen's Diamond Jubilee celebrations ran, to the Euro 2012 final on 1st July, the audience would be distracted and advertising costs were expected to soar. This provided a window of opportunity until the Olympics started on 27th July.

These significant distractions and pressures were out of Jersey's control, but with every threat there is an opportunity. Some of the target audience were not interested in football or the Olympics and would want to get away from it all. The Olympic Torch Relay visited Jersey and offered a great national PR opportunity to put Jersey on the map.

UK Market

TV remains a primary medium for the UK campaign, as it is the most compelling tool to visually communicate the Island's key attributes. However, it requires significant investment, which had been made possible by re-allocating a proportion of the budget from press to TV advertising.

Building on a successful 2011 campaign, the 2012 TV campaign was further developed to include four Island ambassadors, enabling potential visitors to 'Meet the Locals' and learn about their love of the Island, experienced further through individual video clips of each of our ambassadors on YouTube.

Timing of TV activity remains as always a difficult decision, balancing the need to present Jersey to the audience as early as possible for customers to put the Island on their consideration list, with saving resources until later when customers are more likely to be booking. A schedule of TV activity was planned, providing a presence from January to April, using a 2 weeks-on, 2 weeks-off pattern. Due to inflated media costs, it was not possible to purchase airtime in May or June, but subsequently in early July, prior to the Olympic Games, in order to boost late summer bookings.

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.

The overall reach of the 2012 TV campaign was 7.7 million ABC1 Adults, which was 89.9% of this target audience, down from 92.9% in 2011, with an average frequency of 9.1 times, down from 12.2 in 2011. Our overall TV coverage reduced by 2.8% compared to 2011, due to an increase in the cost of airtime, which subsequently reduced the campaign reach.

TV advertising was supported by a brand campaign in the national press weekend travel sections to increase frequency and exposure. This budget had originally been planned for a targeted magazine campaign, but was re-allocated to support the main season business, which was underperforming.

205 press ads ran in 2012 at a rate card value of £2 million providing a mix of travel display pages, weekend newspaper supplements and magazines including M&S Food and Your M&S. 202 joint partner ads ran at a rate card value of £228,000, using mostly national titles with partners choosing the Daily Mail and Mail on Sunday for 102 of these insertions, half of all joint advertising placed. Classified advertising in partnership with trade businesses increased, but investment into these subsidised marketing opportunities remained disappointingly low.

Press advertising remained good value, with lots of late deals becoming available during the year, in contrast to TV media buying. Even with a reduced budget, it was possible to increase press coverage, which led to the overall coverage increasing by 0.4%.

As part of the social media communications plan, in June 2012 Jersey Tourism launched a month-long competition-led Facebook and digital campaign to target walkers and raise awareness of Jersey as a fantastic place for walking. To set the campaign apart and attract maximum attention, Jersey Tourism partnered with Merrell, the international outdoor clothing manufacturer, in addition to local partner brands. Through an integrated mix of activity, the campaign went on to deliver exceptional results in terms of community growth, engagement and visits to the Island. It achieved over 16,000 entries to the competition, over 2,600 email sign ups, almost 147,000 story impressions, a monthly engagement score of 9,343, 10,160 pieces of content shared and a 56% increase in Jersey Facebook users. 875 walkers attended Autumn Walking Week in September, spending over £400,000 while in the Island.

During the course of the year, a variety of emarketing activity was undertaken. This included:

- 9 destination and special offer emails, sent to the UK database of over 98,000 contacts.
- 2 walking emails to promote Spring and Autumn Walking Weeks, sent to the walking database of over 93,000 contacts.
- 1 email to promote La Fête dé Noué, sent to the Guernsey database of 900 contacts.
- 22 different industry partners took part in advertising using emails, some appeared in more than one email.
- 270,547 emails were sent by industry partners using the emailJersey platform.

Jersey Pass

Jersey Pass is in its fourth year of operation – a scheme designed to support the Island's attractions in one comprehensive marketing scheme. The scheme supported 16 attractions in 2012 and created nearly 31,000 visits.

- Total Passes Sold: 5,091
- Total Number of Visits: 30,611
- Total Number of Pass Days: 24,916
- Total Value of Passes Sold: £233,730
- Number of Visits per Day: 1.23

Online UK Consumer Activity

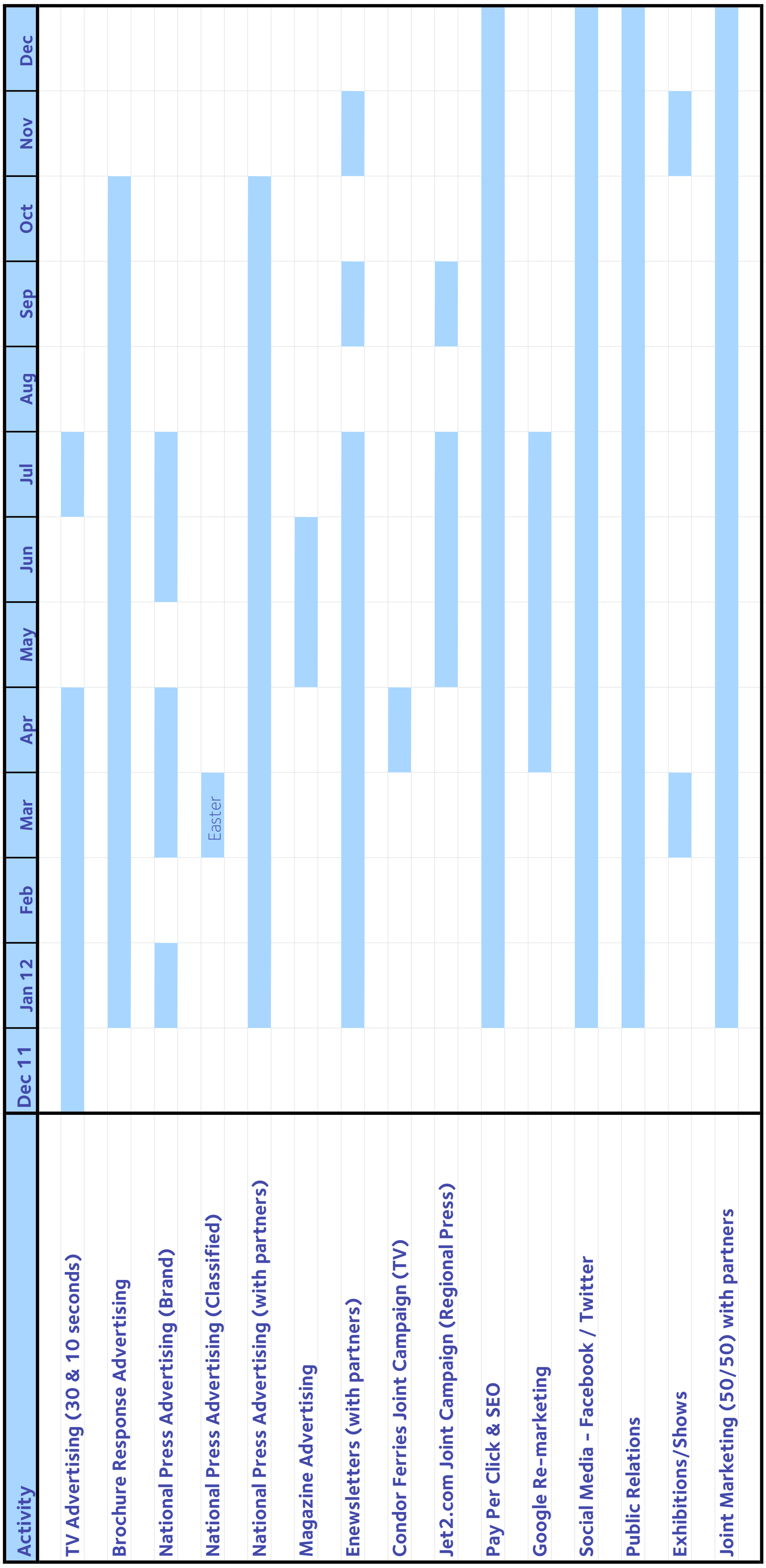
Web	Social	Email	Mobile
2,249,266 Visits	21,277 Facebook Likes	98,000 Subscribers	301 Visits*
2,895 Guestlink Bookings	5404 Twitter Followers	882,000 Emails Delivered	1,362 Views of Ambassador YouTube Clips via Augmented Reality**
64.25% New Visits	145,000 YouTube Channel Views	20.16%† Average Click to Open Rate	160% Increase in Mobile Devices Accessing jersey.com

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

* Launch of mobile site in latter part of 2012.

** Use of Augmented Reality Technology in National Press Campaign.

JERSEY TOURISM 2012 UK CAMPAIGN ACTIVITY



Public Relations Activity

UK Market

The PR strategy was set to achieve coverage that would attract both more of the current consumption audience (made up largely of ABC1 55+ UK adults, the audience for the largest proportion of UK advertising and marketing spend and the group who are currently most likely to travel to the Island) and the future growth audience (made up of a combination of ABC1 UK adults who have families and a younger group of 25-44 ABC1 UK adults). Results for the year include:

- Over 35 journalists visited the Island
- 695 pieces of coverage (97% favourable)
- 'Opportunities to see' number was 750,340,705 (up on 2011's 748,770,430)
- The target was 500,000,000
- Cost per thousand reached was £0.22 (improvement on 2011's £0.30)
- 70% of coverage included a call-to-action
- Highlights included coverage in:
    - National Geographic
    - The Sunday Times Travel
    - Grazia
    - Olive
    - 12 pieces promoted La Fête dé Noué
    - The Independent
    - The Financial Times
    - The Sun
    - Metro
    - 17 pieces promoted the Food Festival
- 84% of UK adults were reached by PR coverage in 2012, a 4% increase from 2011

The focus for the year was to up-weight quality press trips (i.e. reduce numbers but improve quality of journalists visited) and continue to communicate key messages and brand values. The opportunities presented by Jersey's event calendar were maximised, widening awareness of new openings and local attractions, by working collectively with partners.

German Market

The German market continued to perform well in 2012 and increased by 5.8%. Of the three major markets, the German market was the only one to increase business. During 2011 a perceptions survey was undertaken to check assumptions and performance of Jersey campaigns within Germany. Unprompted awareness of Jersey was 32%, with a further 7% stating that they would consider Jersey for a holiday in the next year. An astonishing 61% had heard or read something about Jersey, which is an exceptional result. More than half of those who had heard of Jersey stated that they 'want to go there'. The majority of holidays in Germany are booked with a travel agent.

The campaign was led by a very successful national radio campaign, and also featured prize competitions in partnership with airlines, online consumer advertising, email marketing and social media activities. With a limited campaign budget, it is vital to support this activity with a strong PR presence.

The radio campaign ran from the beginning of April until the first week of May, with 4 different 20" adverts, 2 of which targeted a younger audience. The campaign was designed to increase awareness and demand for Jersey and to promote departure points for direct flight charters. The campaign was national but up-weighted with extra local stations within catchment areas of departure points.

ITB Berlin featured as an important tool in the German business development efforts. ITB is the world's largest tourism exhibition with over 113,000 trade visitors and 172,000 consumer visitors. In 2012, Stand space was increased to accommodate more Jersey businesses who travelled to Berlin. The Jersey Tourism team had 32 trade meetings with airlines and tour operators and 22 PR meetings with a range of television, radio and press journalists.

20,000 copies of the 'Island Guide' in German were produced and provided to travel agencies and tour operators to help support their sales efforts, and also to introduce customers who have pre booked to activities in Jersey before arrival. 8,000 email contacts received the regular e-newsletter and 1,500 fans followed the German Facebook page.

Joint marketing activities are a key part of the strategy in Germany. Partnership marketing with major tour operators such as DERTOUR, TUI Wolters, Wikinger Reisen, Globalis and Troll Tours, along with airlines such as Lufthansa and AirBerlin is a core objective. Activities included travel agent training, print and online media campaigns, prize competitions and trade enewsletters. A further opportunity was taken with AirBerlin to re-build a Jersey landing page on their website by writing and editing copy and featured in the AirBerlin newsletter to 640,000 subscribers, when the new site went live. Assistance was also provided to the carrier to produce and distribute 50,000 city cards with a raffle to win a holiday to Jersey, which attracted over 10,000 entries.

In the PR campaign, 7 individual press trips were invited and delivered and 12 press releases were issued to the German media. Two TV production projects, 'Cruise into happiness' for ZDF and 'NDR Northseareport' for NDR were filmed on location in the Island. During the year, PR activity achieved a circulation of over 8.14 million equating to 46 million reader contacts.

French Market

France, like the UK, suffered from the economic downturn in 2012. However, the severity of the government austerity measures led to public disquiet and uncertainty.

A presidential election was held in France on 22nd April 2012, with a second round run-off held on 6th May.

France's unemployment rate rose to its highest level in 13 years in 2012. The rise in unemployment to 10.2% was indicative of its weak economic position, as the country registered zero growth in 2012.

The Presidential elections dominated the media and minds of the audience. The May holidays in France are a key travel period for Jersey, which was severely impacted due to the French public not wanting to plan or book holidays until they had some certainty about the future. Added to this, was the worst weather experienced for many years, which led to major tour companies slashing prices to tempt customers to warmer destinations.

According to the 2012 Protourisme Survey, tourist activity decreased by almost 30% in some regions. French tourists were looking for sun, leading to very good tourist activity on the Côte d'Azur. Despite an excellent booking rate in Parisian hotels in the summer, tourist activity decreased by 10% in France compared to 2011. Our nearest neighbours in St Malo reported around 30% loss in footfall to the city, this in turn resulted in day trip and staying leisure visitor business also reducing.

The public relations effort in France resulted in Jersey Tourism securing a total of 66 articles for Jersey - 48% in print, 40% online and 12% on TV, reaching over 52 million readers/viewers.

The main highlights of the campaign were the special Jersey programmes broadcast on two regional TV stations, TV Rennes with Métropolitain, a 26 minute programme broadcast on 11th May, and France 3 Basse-Normandie with 5 short programmes broadcast from 16th to 20th July during the evening news.

In addition, two press visits in May and June resulted in excellent coverage in travel blogs L'Esprit du Voyage and Koming Up, both journalists publishing three articles each, with a strong focus on gastronomy and 'deluxe' or luxury accommodation in Jersey.

Print coverage included two press visits which took place in May and resulted in the best articles published in 2012. The first one was a 10-page feature about the Breton-Jersey relationships published in regional Breton magazine Armen. The second was a double page feature in national daily newspaper La Croix about walking, general tourism and Jersey Parishes, published early July.

As in previous years, the regional press, particularly Ouest France, was very supportive and published many articles about major events happening in Jersey throughout the year, following the various press releases issued.

Jersey has developed a unique branding position in France based on research which demonstrated French attitudes to the Island. A campaign website which supports the branding at i-love-jersey.fr. New innovation was a key feature within the French marketing campaign and resulted in the production of a 1' 40" YouTube video clip to start the campaign and used a 30" cut-down version on 'catch-up TV', a French version of iPlayer and Cinema advertising. The video clip had more than 24,000 views during 2012 with great feedback.

A Jersey iPhone app in the iTunes store was launched which received 1,350 downloads and the Facebook page attracted nearly 9,000 Mentions J'aime (likes). The campaign used billboards as a main feature, with a phased approach of bus shelters and large format billboards.

The Department continued to work closely with the main ferry carrier and travel partners, specifically Condor Ferries to increase activity through a June campaign, in an attempt to win back business lost from April and May. Working together, a number of trade groups, including top selling Thomas Cook travel agents were hosted from the Paris region who visited a number of the Island's hotels and attractions.

Product Development

The Product Development team exists to create activities and events that drive new business to Jersey to enhance visitors' on Island holiday experience and where possible, increase on Island spend.

Its primary focus is to develop 'on brand' activity mainly in the shoulder months which is attractive to visitors – both potential visitors and those that have already chosen to visit. The brand promise is that those who visit will be enriched by the 'Jersey' experience.

There are currently five areas of work;

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

Longer Term Product Development

Walking and cycling remain key areas of development and 2012 saw continued work on 'Cycle West' the Anglo/French cycling project funded by the EU.

The project manager, Isabelle Parfitt who is based within Brittany Tourist board, with representatives from the UK, came to Jersey for a technical visit at the beginning of the year. Two routes have been developed for La Petit Tour de Manche, a family route to Corbiere and a coastal route (77 km/48 m). Mark Porter, a journalist also came to the Island to develop copy for a specific Cycle Guide.

Meetings took place in St Malo, Cherbourg and Weymouth to review progress on the project and specific marketing activity.

Annual Programmes of Activity

Programmes of activity are developed based on key tourism experiences. The aim is to expose a 'hidden' Jersey to visitors so they can experience Island life.

The annual guided walking programme, in conjunction with the Jersey Tour Guides Association delivered a weekly programme of over 300 guided walks.

Farm and craft markets were staged in St Aubin and Weighbridge Place throughout the spring and summer and 2012 saw this activity extended to the Royal Square.

The team managed the Howard Davis Park music programme and 2012 saw over 55 performances of live music, theatre and film for visitors to enjoy. The team also co-ordinated the diary of Open Gardens throughout the year and Jersey's entry into the Royal Horticultural Society's 'Britain in Bloom' competition via the local competition 'Jersey In Bloom'. In 2012, six parishes entered the competition.

Festivals and Events

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

The Team organised Liberation Day, the Jersey Food Festival, the spring and autumn Walking Weeks, June in Bloom, the Black Butter event at the Elms in conjunction with the National Trust for Jersey and La Fête dé Noué. These festivals have been developed over the years, primarily in the shoulder months and are aimed at our target audience of 55+ higher spending couples.

New for 2012 was the introduction of 'Hidden Treasures' a new festival in which the National Trust, Jersey Heritage and the Société Jersiaise joined forces with Jersey Tourism to create an event to celebrate Jersey's heritage offering. The festival offered visitors free access to a wide range of properties and included unique events and activities. A highlight of the event was the first public viewing by over 3000 visitors of the hoard of Celtic coins unearthed earlier in the year.

The team were also charged with delivering the public event at the Waterfront for the Queen's Diamond Jubilee celebrations where over 30,000 people gathered to watch live entertainment, a concert screened from Fort Regent, a food fair and fireworks.

Another highlight was the arrival of the Olympic Torch to Jersey which was organised by Jersey Tourism. The Product team created an event at the Weighbridge where the official cauldron was lit and a formal presentation made. An estimated 20,000 people turned out to enjoy the occasion.

The walking festivals continued to deliver business to Jersey at very low costs and 818 visitors took part in the spring event with 720 participants in the autumn event.

The 2012 programme of events was delivered on time and despite bad weather especially in May for the Food festival attracted enthusiastic audiences.

Visitor Services Centre

The customer facing outlet of Jersey Tourism experienced an interesting year during 2012 with major events taking place throughout the year to celebrate the Olympics and the Jubilee and whilst visitor numbers to the Island may have shown a slight decline, the percentage of those visitors coming to the centre remained static.

As a result of the above 2012 was a very productive year for the attractions who participated in the Jerseypass scheme with an increase in online voucher sales of 120% however sales in the office were down by approximately 20%. This can be attributed to the online sales offer of a 20% discount on the pre purchase price of a 6 day pass. However, as a result of this year's trading, all of the attractions have already been contracted for 2013 and some other outlets have come on board with special offers which makes the Jersey Pass an even more attractive proposition for visitors.

The Jerseypass was also given to the 100 Front of House staff who attended the Discovery Training Days at the beginning of the year. This enabled the new members of the industry to visit the participating attractions in their own time which then gave them the confidence to talk to their guests about the various attractions with confidence.

The emphasis for this year's training days was on the many events taking place to celebrate both the Olympics, the Diamond Jubilee, the discovery of 'The Hoard', together with launching the Jersey Food Festival, an event which is expected to grow and become an annual addition to the calendar. Again the participants were motivated and enthused by team members from the Visitor Services Centre, Product Development and Marketing teams and we were delighted to see some 'old faces' attending as they commented that they had found the days to be an invaluable training aid for the new season each year and they always learnt something new!

Chelsea Flower Show

March 2012 was also notable for a last minute invitation to the Chelsea Flower Show. We were invited to join the teams from both the Jersey Farmers Union and St Helier Parks and Gardens who were exhibiting, to act as a support team to distribute tourism information at this prestigious event which welcomed 157,000 visitors.

We were delighted to be in Chelsea when the Farmers Union won Best in Show and St Helier Parks and Gardens won Silver Gilt and to be on the stands when so many visitors came to tell of their previous visits to the Island and also wanting current information to plan their next visit. Having trained personnel on the stands was vital in the promotion of the Island.

Battle of Flowers

Once again the staff from The Centre were able to assist the Battle of Flowers association with ticket sales through an outlet in Liberty Wharf and also trained the staff that were then selling in the second outlet at Marks & Spencer. This is always a challenging but enjoyable time which resulted in ticket sales through our office of approximately £70,000. This may change in the future with the onset of online ticketing but the event will still be promoted in The Centre as usual.

Accommodation Sales

The online booking system for accommodation providers generated over £830k of sales. This was a downturn in actual bookings on the previous year however it was noted that the yield per booking had increased. By the end of the year 129 properties were connected to Guestlink and plans are in place to expand the usage of the NVG product to include conference booking ability and retailing online.

Jersey Conference Bureau

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

The number of staying delegates decreased by 32% to 6,332 from 9,326 delegates in the previous year.

The number of events was similar at 257 events compared with 258 the previous year.

The number of association bednights decreased by 26% to 15,607. The number of corporate bednights decreased by 56% to 6,216.

The number of bednights sold decreased from 33,830 to 21,823.

The Jersey Conference Bureau is operated as a Public, Private Partnership with the majority funding being provided by the Economic Development Department. 2012 industry input to match funding initiatives was £13,095 with 10 industry suppliers involved in match funding projects. Overall industry financial support, including partnership fees, was £45,288. This is a decrease from £99,563 in 2011 of 55%.

Further information can be obtained from www.jerseyconferences.com

Financial Report

	2012 Actual £000	2011 Actual £000
Corporate		
Strategy and Policy	638	461
Research and Planning	99	169
Communications		
Advertising and Media	2,014	2,003
Distribution	540	586
Marketing Services	211	281
Product Development	740	652
Market Development		
Trade Relations	407	677
Consumer and Media Relations	1,386	1,526
Visitor Services	320	266
Net Revenue Expenditure	**£ 6,355**	**£ 6,621**

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

Key Financial Results

Total revenue expenditure for 2012 was £6,355 a decrease of £266k (-4.0%) compared with 2011.

Corporate expenditure increased by £107k (-17.0%)

The increase in Corporate Strategy and Policy expenditure was mainly due to an increase in route development (97k).

Communications expenditure decreased by £17k (-0.5%)

There was an increase in Product Development (£88k) mainly due to additional events including the Diamond Jubilee and the Olympic Torch.

This was offset by a slight decrease in Marketing and Distribution mainly due to a reduction in mailing costs.

Market Development expenditure decreased by £356k (-6.8%)

There was a slight reduction in Consumer and Media Relations overheads and staff for 2012 (106k). There was also a reduction of trade relations partnership advertising (136k) together with more favourable terms for European advertising costs (£40k).

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.

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.

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 2008 - 2012

	2008	2009 Jersey Travel Survey 2009	2010	2011	2012 Jersey Travel Survey 2012	2012 vs. 2011
On-Island Visitor Expenditure	£234 million	£221 million	£225 million	£231 million	£227 million	-1.6%
On-Island Visitor Expenditure Reflated to 2012 levels	£265 million	£244 million	£244 million	£238 million	£227 million	-4.4%
Total Tourism Visitor Volume	726,400	680,800	690,100	699,900	688,300	-1.7%
Total bed nights sold over year	2.03 million	1.77 million	1.73 million	1.77 million	1.70 million	-4.1%
Total room nights sold over year	1.00 million	0.86 million	0.90 million	0.93 million	0.89 million	-3.6%
Staying Leisure Visitor Volume	362,300	338,500	335,500	339,700	333,200	-1.9%
Staying Leisure Visitor Average Stay	4.4	4.4	4.3	4.3	4.3	-1.4%
Staying Leisure Visitor On-Island Expenditure	£157 million	£148 million	£151 million	£159 million	£159 million	0.2%
Staying Leisure Visitor On-Island Expenditure Reflated to 2012 levels	£178 million	£164 million	£163 million	£163 million	£159 million	-2.6%
Staying Business Visitor Volume	69,700	57,700	66,100	66,500	67,200	1.1%
Staying Business Visitor Average Stay	2.3	2.3	2.4	2.3	2.2	-2.2%
Staying Business Visitor On-Island Expenditure	£24 million	£20 million	£24 million	£23 million	£23 million	0.0%
Staying Business Visitor On-Island Expenditure Reflated to 2012 levels	£28 million	£22 million	£26 million	£24 million	£23 million	-2.8%
Staying Conference Visitor Volume	9,200	9,200	9,200	9,300	6,300	-32.1%
Staying Conference Visitor Average Stay	4.0	4.1	3.7	3.6	3.5	-5.0%
Staying Conference Visitor On-Island Expenditure	£5.4 million	£5.4 million	£5.3 million	£5.2 million	£3.2 million	-37.5%
Staying Conference Visitor On-Island Expenditure Reflated to 2012 levels	£6.2 million	£6.0 million	£5.7 million	£5.3 million	£3.2 million	-39.3%
Day Trip Visitor Volume	143,200	134,500	140,100	145,900	149,300	2.3%
Day Trip Visitor On-Island Expenditure	£7.6 million	£7.4 million	£7.9 million	£8.5 million	£8.9 million	5.1%
Day Trip Visitor On-Island Expenditure Reflated to 2012 levels	£8.6 million	£8.2 million	£8.6 million	£8.7 million	£8.9 million	2.1%
Hospitality sector jobs [1]	6,110	6,060	6,040	6,320	6,320	0.0%
Registered accommodation establishments	145	142	141	143	140	-2.1%
Registered tourism bed spaces [2]	12,800	12,000	11,900	12,000	11,800	-1.5%
Total bed nights available over year	3,485,600	3,345,500	3,265,400	3,284,100	3,322,000	1.2%
Average yearly bed space occupancy	58%	53%	53%	54%	51%	-5.1%
Average yearly room space occupancy	65%	58%	61%	62%	60%	-4.1%
August bed space occupancy	83%	81%	83%	82%	78%	-4.1%
August room space occupancy	87%	82%	91%	88%	85%	-4.1%
Total booking revenue generated by JerseyLink	£1.2 million	£1.1 million	£1.0 million	£1.1 million	£0.8 million	-24.4%
Total visits to www.jersey.com [3]	920,300	1,287,700	1,451,900	2,025,700	2,249,300	11.0%

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 2012 (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 2012

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.

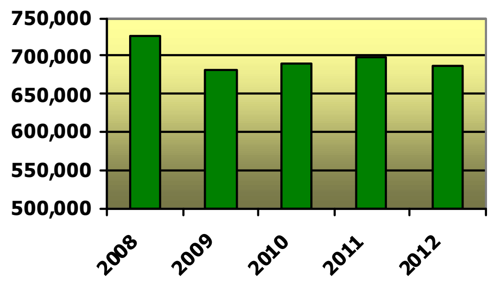
The following summary of 2012 results emphasises the importance and impact of the tourism industry in Jersey.

- 688,300 Visitors.
- 333,200 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).
- £227 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 1.7% from 699,900 in 2011 to 688,300 in 2012, following an increase of 1.4% between 2010 and 2011.

Figure 1 Total visitor volume 2008-2012

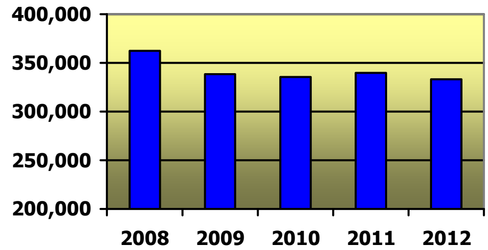


*A full breakdown of total visitor numbers can be found in **Appendix 1**.*

1.3 Staying Leisure Visitors

Figure 2 below shows how total staying leisure visitor volume decreased by 1.9% from 339,700 in 2011 to 333,200 in 2012, following an increase of 1.2% between 2011 and 2010.

Figure 2 Staying leisure visitors 2008-2012



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 1.1% from 101,700 in 2011 to 100,600 in 2012. 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 2012

	Volume	%
UK	**84,400**	**84%**
Ireland	**3,300**	**3%**
France	**3,100**	**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 601,400 overnight stays in Jersey in 2012.

1.5 Language Students

Visiting language student numbers increased by 4.7% from 3,200 in 2011 to 3,350 in 2012.

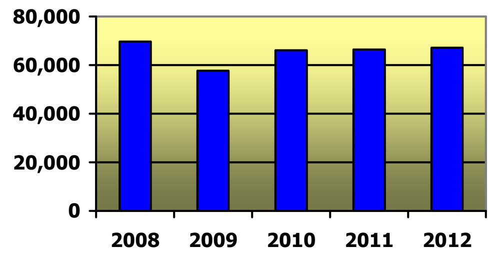
Language students in 2012 are estimated to have stayed in Jersey for an average of 12.7 nights, with the total market accounting for 42,500 nights. The majority of students stay with host families which puts a constraint upon the maximum size the language student market can achieve.

1.6 Business Visitors

The business market is estimated to have increased by 5.8% from 103,800 in 2011 to 109,800 in 2012.

In 2012 the number of staying (one or more nights) business visitors increased by 1.1% to 67,150, with business day visits increasing by 14% to 42,700.

Figure 3 Staying business visitors 2008-2012



The increase in staying business visitor volume, coupled with a small decrease in average stay accounted for 147,700 bed nights sold, 1.2% less than in 2011.

Table 2 Staying business visitor volumes by market 2012

	Volume	%
UK	**56,550**	**84%**
Other CI	**3,500**	**5%**
France	**1,650**	**2%**
Ireland	**650**	**1%**
Switzerland	**600**	**1%**
Other	**4,200**	**6%**

1.7 Visiting Conference Delegates

Residential conference delegate numbers decreased by 32% from 9,330 in 2011 to 6,330.

The number of conferences/events decreased by just 1 from 258 in 2011 to 257 in 2012. The number of Corporate delegates was 3,130, while the number of Association delegates was 3,200.

The number of bed nights sold decreased by 35% from 33,800 in 2011 to 21,800.

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

1.8 Visiting Yachtsman

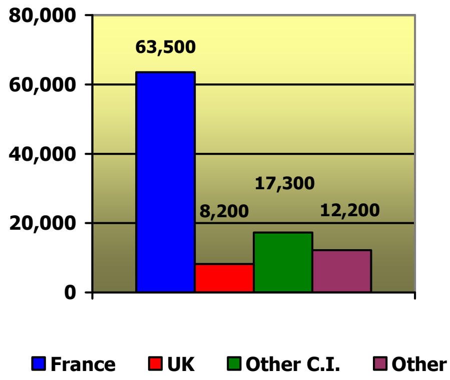
The number of visiting yachtsmen decreased by 12% from 23,400 in 2011 to 20,500 in 2012, staying an average of 2.2 nights, the same as in 2011.

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

1.9 Leisure Day Trips

Leisure day trip visits decreased by 2% from 103,250 in 2011 to 101,200 in 2012.

Figure 4
Breakdown of leisure day trip visitors by market



Source: 2012 Travel Survey

1.10 Visitor Expenditure Estimates

Total on-Island expenditure in 2012 is estimated at £227 million.

Tourism expenditure in Jersey in 2012 has decreased by 1.6% compared to 2011.

Table 3 shows a breakdown of estimated on-Island visitor expenditure by visitor type 2011 vs. 2012.

Table 3 Total visitor spend 2011 vs. 2012

	2011 value of market 000's	2012 value of market 000's	% change
Staying Leisure Visitors	£158,603	£158,892	0%
Visiting friends/relatives	£23,365	£22,366	-4%
Language students	£3,116	£3,186	2%
Leisure day visitors	£5,236	£5,035	-4%
Visiting yachtsmen	£2,379	£2,210	-7%
Business visitors	£26,460	£27,110	2%
Conference delegates	£5,157	£3,222	-38%
Other visitors	£6,698	£5,213	-22%
Total visitor spend	**£231,014**	**£227,233**	**-2%**

N.B. 2011 figures are not reflated.

Table 4 shows a breakdown of estimated on-Island visitor expenditure per visitor by visitor type 2011 vs. 2012.

Table 4 Spend per Visitor 2011 vs. 2012

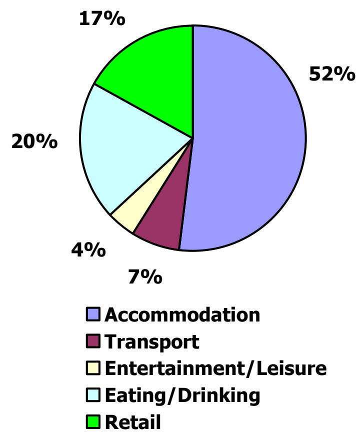
	2011 spend per visitor	2012 spend per visitor	% change
Staying Leisure Visitors	£467	£477	2%
Visiting friends/relatives	£230	£222	-3%
Language students	£974	£951	-2%
Leisure day visitors	£51	£50	-2%
Visiting yachtsmen	£102	£108	6%
Business visitors	£255	£247	-3%
Conference delegates	£553	£509	-8%
Other visitors	£434	£393	-9%
Average spend per visitor	**£330**	**£330**	**0%**

N.B. Figures have been rounded.
N.B. 2011 figures are not reflated.

Breakdown of on-Island visitor spend 2012

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 2012



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 17% on miscellaneous items which are mainly retail.

Visitor expenditure estimates are based upon the most recent visitor expenditure survey undertaken in 2012.

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

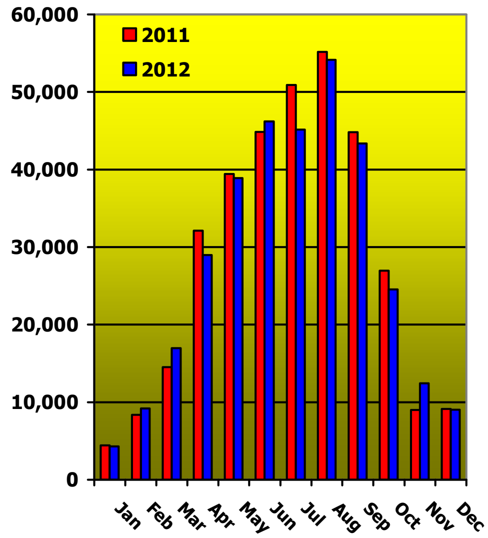
The following tables show **staying leisure visitor** trends, with the data derived from those visitors staying in registered accommodation that filled in visitor registration cards and stated that their main purpose of visit was "holiday" or "sport".

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 2012 started well, followed by a weaker performance in April. The main fall in 2012 was in July, although August to October were also slightly down compared to 2011. The year ended with a strong performance in November, and a similar level of visitors to 2011 in December.

Figure 6 Staying leisure visitor arrivals by month 2011 and 2012.



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 - 2012 party composition.

	Adults (over 16)	Children (under 16)	Total Visitors
UK	223,000	18,100	241,100
Ireland	3,500	300	3,800
Other CI	18,300	1,800	20,100
France	32,400	4,400	36,800
Germany	13,300	500	13,800
Benelux	3,700	300	4,000
Other	12,700	900	13,600
Total	**306,900**	**26,300**	**333,200**

In 2012, children accounted for 8% of total staying leisure visitors, a slightly larger percentage than the 7% in 2011.

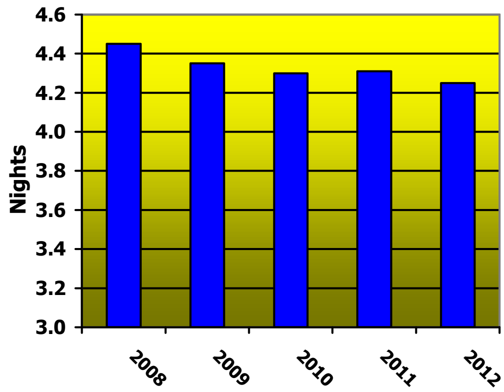
2.3 Average Length of Stay

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 2008 to 2012.

Figure 7 Staying leisure visitors – average stay 2008-2012



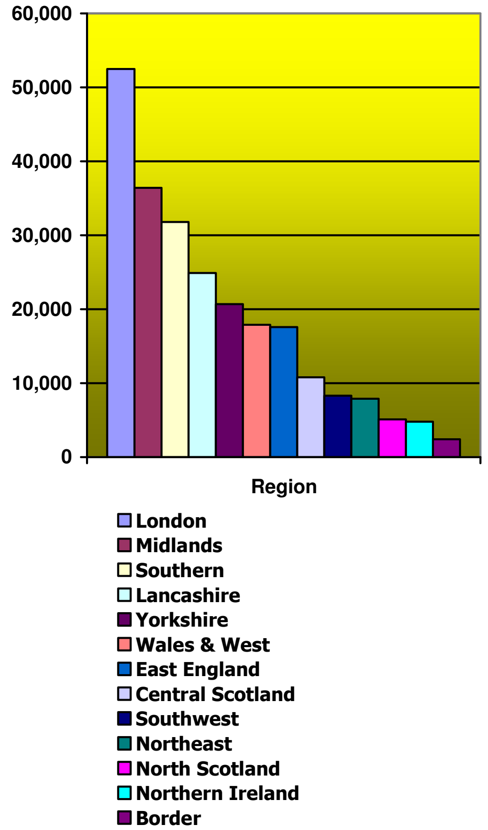
Source: Visitor registration cards

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 2012



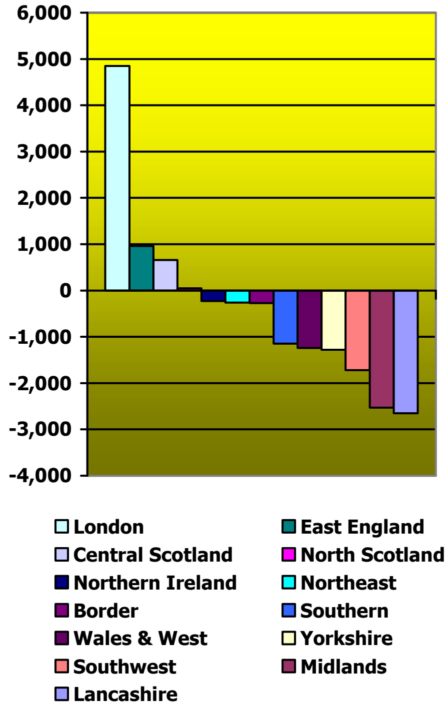
There have been some significant changes in the regional distribution of visitors by ISBA region between 2008 and 2012. These changes are partly reflective of the changes to capacity on certain routes and of some new routes being introduced, as well as discontinued routes.

Table 7 and Figure 9 opposite show the changes in volumes of visitors by ISBA region between 2012 and 2011.

Table 7 Visitor volume changes 2012 vs. 2011

London	4,850
East England	960
Central Scotland	660
North Scotland	50
Northern Ireland	-230
Northeast	-260
Border	-270
Southern	-1,150
Wales & West	-1,240
Yorkshire	-1,280
Southwest	-1,720
Midlands	-2,530
Lancashire	-2,650

Figure 9 Visitor volume changes 2012 vs. 2011



Compared to the UK's population distribution, Jersey had highest penetration in 2012 in the Southern and Southwest regions, followed by the London and East England regions.

In 2012, 50% of Jersey's UK visitors came from the London, Midlands, and Southern regions.
*For more detailed analysis of the ISBA region profiles, please refer to the **Appendix 3**.*

2.4.2 France

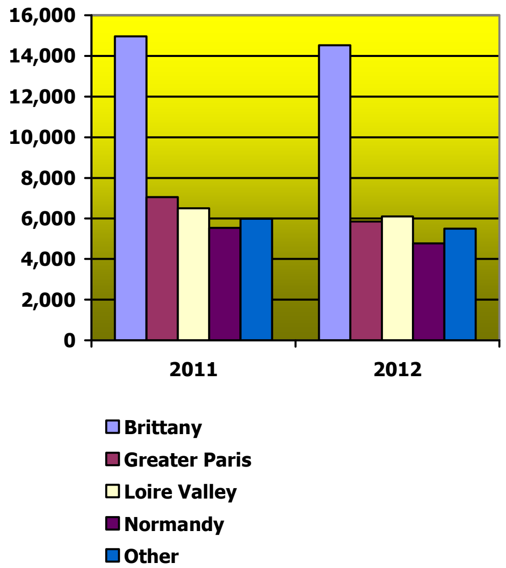
The first two digits of French postcodes from returned visitor registration cards have also been captured so that a continuous monitor of visitors from French Départements has been possible. Départements are grouped into French regions.

Table 8 and Figure 10 show the distribution of French staying leisure visitors between 2011 and 2012.

Table 8 French visitors by region 2012 vs. 2011

	2011	2012	Change 12/11	Change 12/11
Brittany	14,960	14,520	-3%	-440
Greater Paris	7,050	5,860	-17%	-1,190
Normandy	5,540	4,780	-14%	-760
Loire Valley	6,510	6,100	-6%	-410
South East	1,320	1,230	-7%	-90
South West	1,100	940	-15%	-160
Other	3,570	3,330	-7%	-240
Total	40,050	36,760	-8%	-3,290

Figure 10 French visitors by region 2012 vs. 2011



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 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 that particular Mosaic group.

Table 9 Mosaic groups of UK visitors 2012

MOSAIC Group	% UK Households	Jersey Visitors	Index 2012
Alpha Territory	3.5%	6.9%	**2.0**
Professional Rewards	8.2%	17.3%	**2.1**
Rural Solitude	4.4%	6.5%	**1.5**
Small Town Diversity	8.8%	11.5%	**1.3**
Active Retirement	4.4%	5.4%	**1.2**
Suburban Mindsets	11.2%	13.3%	**1.2**
Careers and Kids	5.8%	7.8%	**1.3**
New Homemakers	5.9%	3.4%	**0.6**
Ex-Council Community	8.7%	5.2%	**0.6**
Claimant Cultures	5.2%	1.6%	**0.3**
Upper Floor Living	5.2%	1.4%	**0.3**
Elderly Needs	6.0%	2.7%	**0.5**
Industrial Heritage	7.4%	7.0%	**1.0**
Terrace Melting Pot	7.0%	2.9%	**0.4**
Liberal Opinions	8.5%	7.1%	**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 2011 and 2012. The average stay for UK visitors decreased from 4.8 nights in 2011 to 4.7 in 2012. German stay has increased from 5.9 to 6.2 nights in 2012.

- The percentage of visitors booking their holiday through a tour operator was 59% in 2012; representing an increase from 49% in 2010, and 55% in 2011.

- The percentage of first time visitors in 2012 remained the same at 47%. This figure has been fairly consistent over the past 5 years.

- In 2012 the booking lead time has remained at a very similar level to 2011. 34% of visitors booked their accommodation less than one month before arrival, 35% between 1 and 3 months before and 31% over 3 months in advance.

- Between 2008 and 2010 the percentage of staying leisure visitors travelling by air to Jersey consistently hovered around the 72% mark but fell to 67% in 2011. In 2012, this has risen again, with 71% of staying leisure visitors travelling by air to Jersey.

- Since 2010 the average adult age has remained at 54 years. UK visitors at 56 are generally older than most European visitors.

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

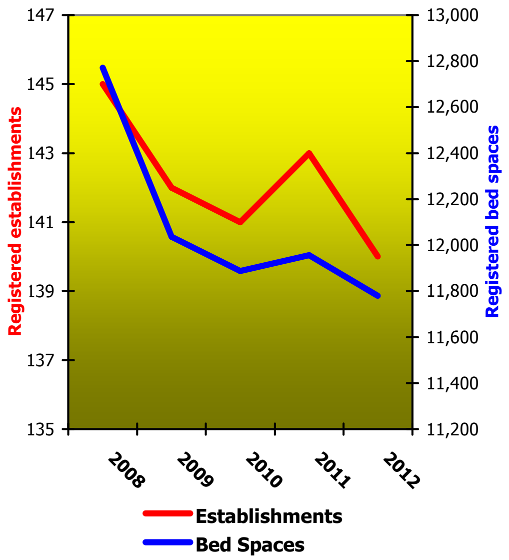
3. Registered Bed Stock

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

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

However, in recent years the decline has slowed. After a small increase in 2011 the registered number of bed spaces has fallen back again slightly in 2012.

Figure 11 Registered establishments and bed spaces 2008-2012



In 2012, Jersey had 140 registered establishments, representing almost 11,800 tourist bed spaces. Hotels accounted for 77% of the total bed stock in 2012.

Compared to 2011, the number of registered bed spaces increased for youth hostels and self catering, but fell for campsites, hotels and guest houses.

The largest fall in bed spaces over the past 5 years has been from campsites and hotels. There have been increases in the number of guest house, self catering and youth hostel bed spaces. Hotel bed spaces have fallen by 7% over the past 5 years. The average number of bed spaces per establishment was 84 in 2012 and has stayed at this level for the past 4 years.

Figure 12
Distribution of bed spaces 2008-2012

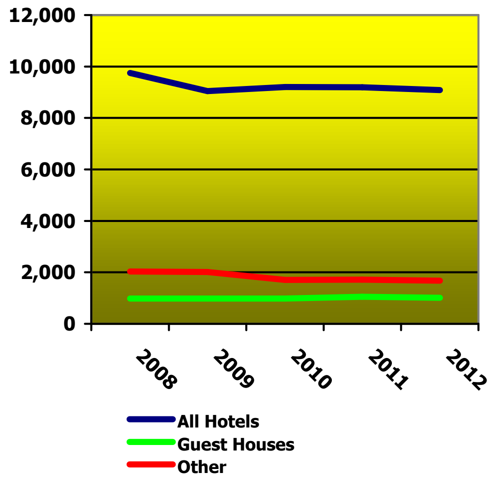
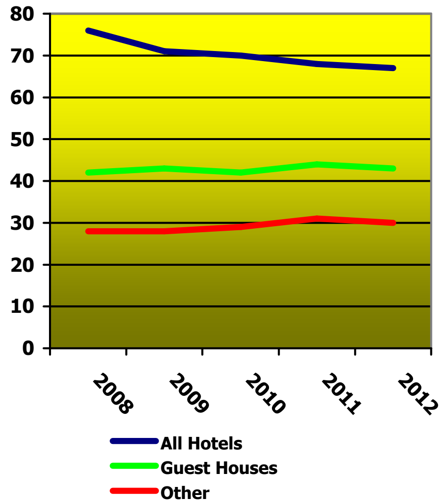


Figure 13
Distribution of establishments 2008-2012



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

4. Accommodation Performance Indicators

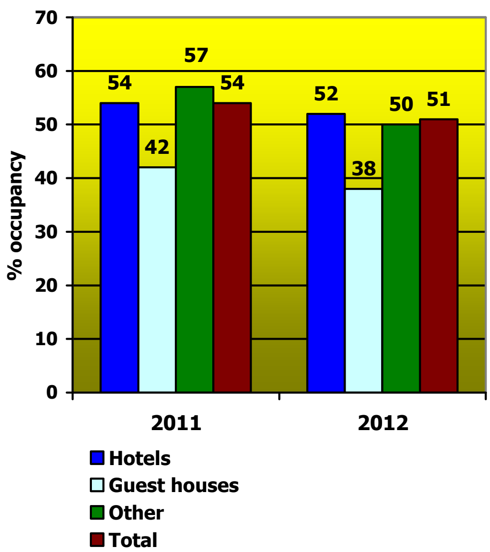
This section shows the performance in terms of bed and room nights sold, and occupancy levels achieved, in the accommodation sector.

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 2012 vs. 2011.

Figure 14 Bed space occupancy 2012 vs.2011

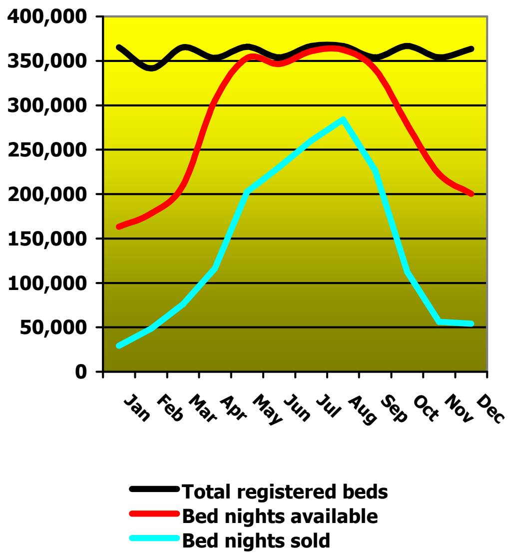


In 2012, total bed space occupancy averaged 51%, compared to 54% in 2011. Bed nights sold in all accommodation decreased by 4.1% to 1,696,600 and total bed night availability increased by 1.2% to 3,322,000 due to more beds being open outside of the main season.

4.1.1 Monthly Bed Occupancy

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

Figure 15 Bed spaces – available and sold

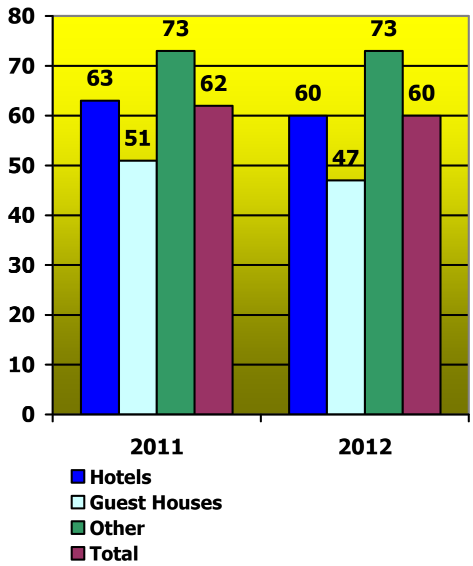


4.2 Room Occupancy

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 2012 vs. 2011.

Figure 16 Room space occupancy 2012 vs. 2011



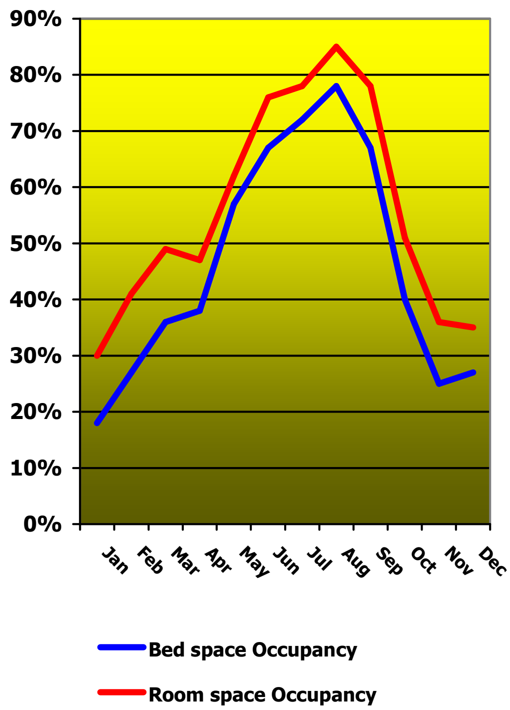
In 2012 total room occupancy averaged 60%; a slight fall from 62% in 2011. Rooms sold in all accommodation decreased by 3.6% to 894,800 while total rooms available increased by 0.5% to 1,497,000.

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 2012



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 2011 vs. 2012

	2011	2012	12 vs. 11
Number of bookings	3,900	2,900	-27%
Number of bed nights	27,200	20,800	-23%
Revenue	£1,099,200	£830,600	-24%

The above table shows a 27% decrease in bookings, resulting in a decrease of 23% in bed nights sold through the system in 2012. Revenue in 2012 decreased by 24% to £830,600 compared to 2011, producing an average per person per night rate of £39.86, a decrease on 2011 of £0.63 (-1.6%).

JerseyLink bookings accounted for 1.23% of total bed nights sold in 2012, compared to 1.54% in 2011.

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 2008 – 2012

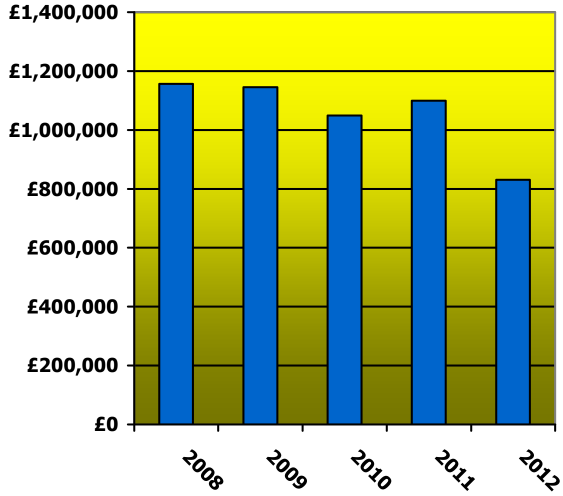
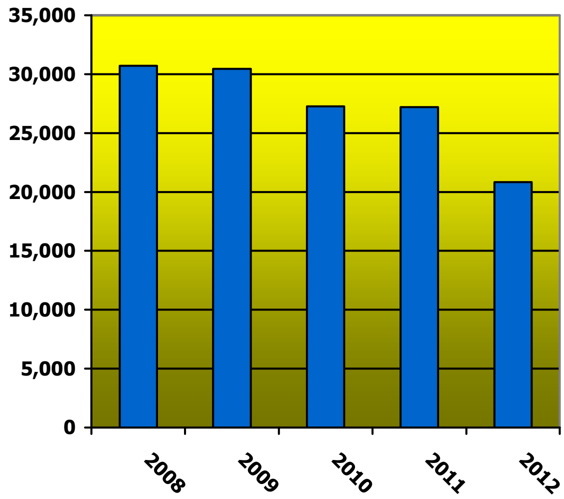


Figure 19
JerseyLink Bednights Sold 2008 – 2012



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 2012, there were over 2.2 million visits to the site, compared to 2.0 million in 2011. 54% of site traffic in 2012 came from the UK, followed by 13% 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, 2010 - 2012

	2010	2011	2012
Visits	1,451,874	2,025,739	2,249,266
Unique Visitors	990,660	1,424,113	1,494,777

Visits to Jersey.com by Market, 2010 - 2012

	2010	2011	2012
UK	765,879	1,061,659	1,210,474
France	195,678	286,356	282,886
Germany	65,137	91,846	89,798

Source: Google Analytics

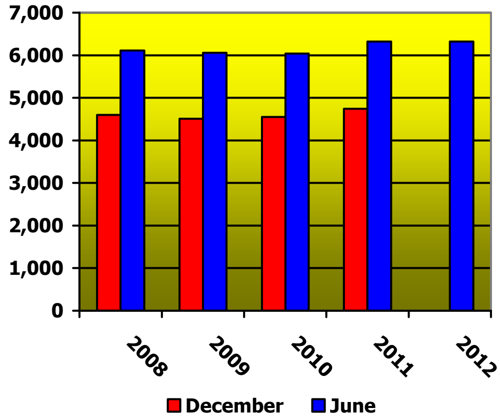
7. Employment in the Hospitality Sector

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

Manpower Returns

Figure 20 below shows the number of employees in the hospitality sector between 2008 and 2012. There has been increased total employment in the sector over the past 4 years and June 2012 saw the same number of total staff employed as in June 2011.

Figure 20 Total staff employed in the hospitality sector 2008 – 2012



Source: States Statistics Unit

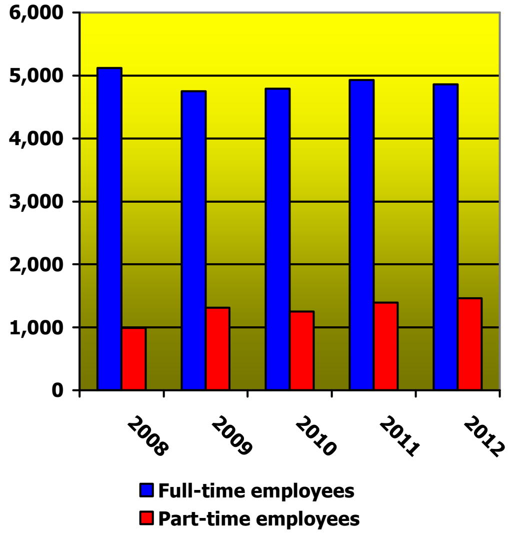
The difference between the number of staff employed in June 2012 and December 2011, some 1,580, would indicate the seasonal nature of tourism employment. The equivalent figure in 2011 was 1,770.

Measured against staff employed in all sectors, the percentage attributable to the hospitality sector in the June reports has risen from 12% in 2008 to 13% in 2012. 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 2008. In 2012, full-time staff numbers fell slightly while part-time employment increased slightly.

In 2012, full-time employees accounted for 77% of all those employed in hotels, restaurants and bars, compared to 84% in 2008.

Figure 21 Full-time vs. part-time posts (June) 2008 – 2012



Source: States Statistics Unit

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

8. Passenger Arrivals

In 2012, passenger arrivals through Jersey's airport decreased by 9,400 (-1.3%) and passengers through Jersey's harbour terminals decreased by 30,500 (-7.8%).

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

Figure 22 Total passenger arrivals 2008 – 2012

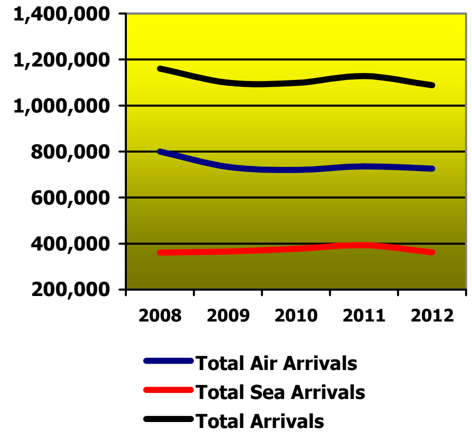
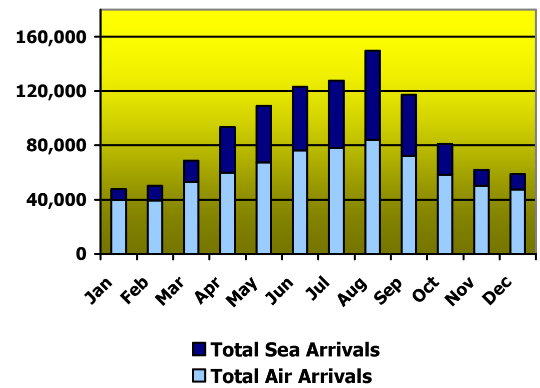


Figure 23 shows arrivals by month during 2012. The pattern of higher arrivals during the summer months reflects the seasonality of the "tourist" season.

Figure 23
Total air & sea arrivals by month for 2012

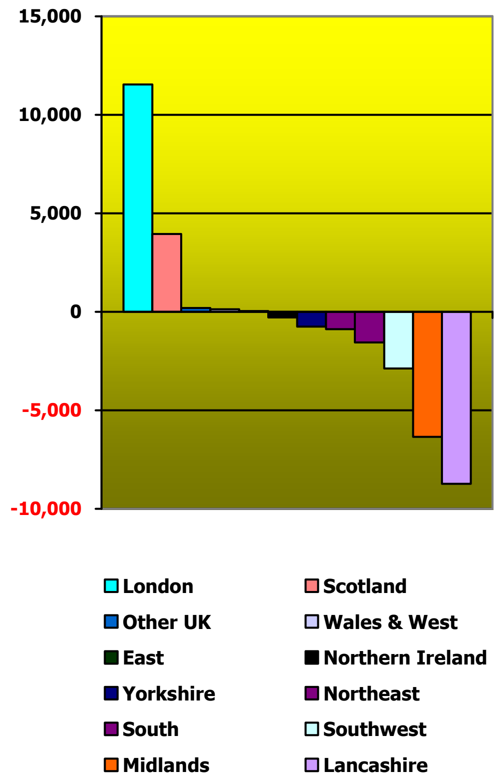


As in recent years, 2012 again saw some significant changes in arrivals patterns.

4 UK regions showed increases in passenger arrivals. The highest increase was from Greater London (+11,500), mainly due to large increases in passenger numbers on the London City and Southend routes. There was also an increase of 4,000 passengers from Scotland due to the Glasgow route. The main regional falls in passenger numbers have been from Lancashire (-8,700) and the Midlands (-6,350).

Figure 24 illustrates the impact of operators in 2012 vs. 2011 by region.

Figure 24 Changes in UK air arrivals by region 2012 vs. 2011



*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 the Jersey Tourism Inspectorate. Due to the continuously changing numbers of registered properties and rooms, the figures within this report may not be equivalent to previously released figures as they depend upon the exact date that they were recorded.

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

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

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

Other Sources used within the 2012 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 2008 - 2012

STAYING HOLIDAY/LEISURE VISITORS	2008	2009	2010	2011	2012	*Change 12/11*	Average '08-'12
UK	282,820	255,990	250,680	245,940	241,130	*-2.0%*	255,310
IRELAND	5,770	5,570	4,440	4,100	3,760	*-8.3%*	4,730
OTHER CI	16,470	16,590	16,340	18,850	20,090	*6.6%*	17,670
FRANCE	32,070	34,260	36,510	40,050	36,760	*-8.2%*	35,930
GERMANY	8,850	9,260	10,680	13,090	13,850	*5.8%*	11,150
NORWAY	810	420	580	730	1,160	*58.9%*	740
SWEDEN	930	570	460	500	430	*-14.0%*	580
NETHERLANDS	2,960	3,150	3,550	3,290	2,520	*-23.4%*	3,090
BELGIUM	1,730	1,610	1,520	1,450	1,450	*0.0%*	1,550
SWITZERLAND	1,810	2,000	1,900	2,220	2,250	*1.4%*	2,040
FINLAND	110	150	220	210	170	*-19.0%*	170
DENMARK	420	410	450	520	290	*-44.2%*	420
AUSTRIA	580	630	410	870	1,240	*42.5%*	750
SPAIN	360	420	360	480	310	*-35.4%*	390
PORTUGAL	250	380	220	160	250	*56.3%*	250
ITALY	240	460	340	340	260	*-23.5%*	330
CANADA	710	480	670	650	860	*32.3%*	670
USA	880	1,110	1,340	1,210	1,120	*-7.4%*	1,130
AUSTRALIA	1,030	910	1,110	1,300	1,540	*18.5%*	1,180
OTHER	3,500	4,060	3,730	3,720	3,780	*1.6%*	3,760
TOTAL STAYING LEISURE [1]	**362,280**	**338,460**	**335,520**	**339,690**	**333,210**	*-1.9%*	**341,830**

	2008	2009	2010	2011	2012	*Change 12/11*	Average '08-'12
VISITING FRIENDS/RELATIVES [2]	95,470	101,010	99,780	101,740	100,570	*-1.1%*	99,710
LANGUAGE STUDENTS [3]	2,850	2,680	2,950	3,200	3,350	*4.7%*	3,010
BUSINESS VISITORS [4]	105,430	88,910	99,720	103,830	109,830	*5.8%*	101,540
CONFERENCE DELEGATES [5]	9,190	9,240	9,220	9,330	6,330	*-32.2%*	8,660
VISITING YACHTSMEN [6]	19,920	21,420	23,230	23,420	20,520	*-12.4%*	21,700
LEISURE DAYTRIPPERS [7]	96,730	98,360	101,250	103,250	101,230	*-2.0%*	100,160
OTHER [8]	34,520	20,740	18,380	15,420	13,260	*-14.0%*	20,460
TOTAL VISITORS	**726,390**	**680,820**	**690,050**	**699,880**	**688,300**	*-1.7%*	**697,070**

[1] Staying leisure visitors are based upon returns of visitor registration cards and the 2007, 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 2007, 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 2007, 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 2007, 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 2011 AND 2012

	2011		2012		2012 vs. 2011	
	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	£492	£120,983	£495	£119,329	1%	-1%
Ireland	£493	£2,022	£478	£1,796	-3%	-11%
Other C.I.	£247	£4,646	£245	£4,930	-1%	6%
France	£273	£10,928	£281	£10,346	3%	-5%
Germany	£718	£9,394	£807	£11,180	12%	19%
Benelux	£481	£2,282	£496	£1,971	3%	-14%
Other	£646	£8,347	£684	£9,341	6%	12%
Staying Leisure Total [1]	**£467**	**£158,603**	**£477**	**£158,892**	**2%**	**0%**
Visiting friends/relatives [1]	**£230**	**£23,365**	**£222**	**£22,366**	**-3%**	**-4%**
Language students [2]	**£974**	**£3,116**	**£951**	**£3,186**	**-2%**	**2%**
Daytrippers - French	£44	£2,388	£44	£2,773	0%	16%
Daytrippers - UK	£44	£482	£45	£368	2%	-24%
Daytrippers - Other C.I.	£87	£1,720	£85	£1,469	-2%	-15%
Daytrippers - Other	£35	£647	£35	£425	0%	-34%
Daytrippers - Total [1]	**£51**	**£5,236**	**£50**	**£5,035**	**-2%**	**-4%**
Visiting yachtsmen [3]	£102	£2,379	£108	£2,210	6%	-7%
Business - Day visitors	£79	£2,970	£85	£3,621	8%	22%
Business - Staying visitors	£353	£23,490	£350	£23,489	-1%	-0%
Business visitors - Total [1]	**£255**	**£26,460**	**£247**	**£27,110**	**-3%**	**2%**
Conference - Association	£782	£2,543	£652	£2,090	-17%	-18%
Conference - Corporate	£430	£2,614	£362	£1,132	-16%	-57%
Conference delegates - Total [4]	**£553**	**£5,157**	**£509**	**£3,222**	**-8%**	**-38%**
Other - Day visitors	£55	£286	£50	£266	-9%	-7%
Other - Staying visitors	£630	£6,412	£625	£4,947	-1%	-23%
Other visitors - Total [1]	**£434**	**£6,698**	**£393**	**£5,213**	**-9%**	**-22%**
Total Visitors	**£330**	**£231,014**	**£330**	**£227,233**	**0%**	**-2%**

[1] Expenditure is calculated by using results from the 2012 Jersey Travel Survey. 2011 estimates have also been updated based on this Survey.

[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. 2011 estimates have also been updated based on this Survey.

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

N.b. 2011 figures have not been reflated to 2012 prices.

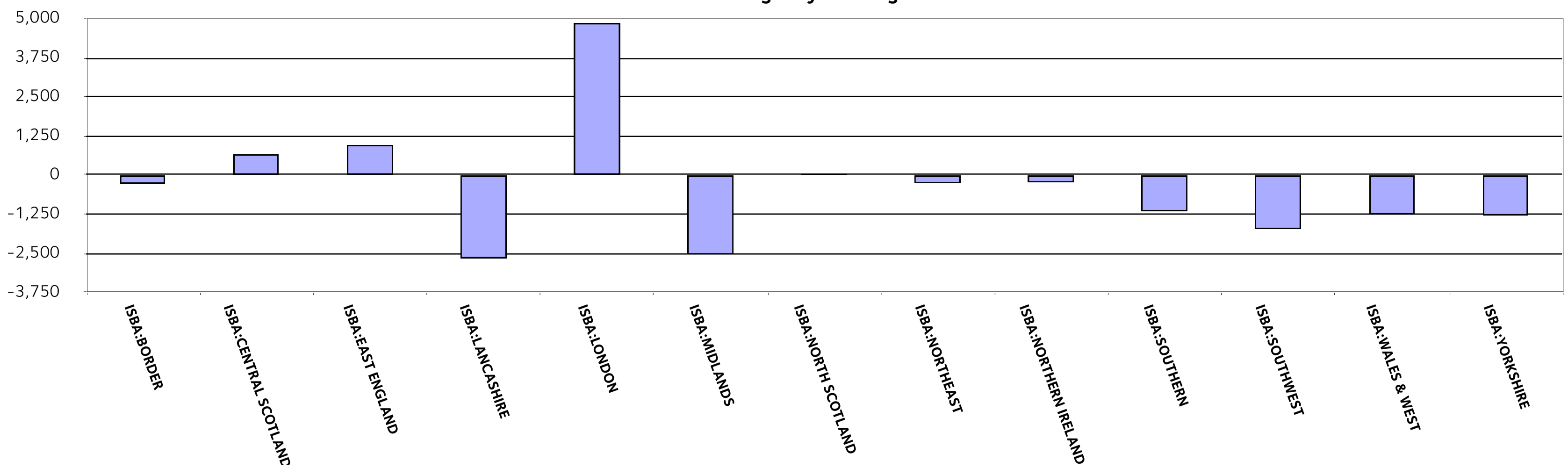
Appendix 3

UK Staying Leisure Visitors by ISBA Region 2008 - 2012

REGION	UK Households	2008	Market Share	2009	Market Share	2010	Market Share	2011	Market Share	2012	Market Share	% Change 12/11	Vol. Change 12/11	2012 Index
ISBA:BORDER	**1.2%**	3,390	1%	2,610	1%	2,440	1%	2,670	1%	2,400	1%	**-10.1%**	**-270**	**0.83**
ISBA:CENTRAL SCOTLAND	**6.3%**	17,820	6%	8,890	3%	10,120	4%	10,110	4%	10,770	4%	**6.5%**	**660**	**0.71**
ISBA:EAST ENGLAND	**6.7%**	18,950	7%	17,690	7%	17,250	7%	16,680	7%	17,640	7%	**5.8%**	**960**	**1.09**
ISBA:LANCASHIRE	**11.6%**	32,810	12%	26,290	10%	28,640	11%	27,540	11%	24,890	10%	**-9.6%**	**-2,650**	**0.89**
ISBA:LONDON	**19.4%**	54,870	19%	51,550	20%	48,270	19%	47,630	19%	52,480	22%	**10.2%**	**4,850**	**1.12**
ISBA:MIDLANDS	**15.4%**	43,550	15%	41,790	16%	39,640	16%	38,950	16%	36,420	15%	**-6.5%**	**-2,530**	**0.98**
ISBA:NORTH SCOTLAND	**2.1%**	5,940	2%	4,640	2%	5,110	2%	5,080	2%	5,130	2%	**1.0%**	**50**	**1.01**
ISBA:NORTHEAST	**5.1%**	14,420	5%	6,890	3%	8,180	3%	8,190	3%	7,930	3%	**-3.2%**	**-260**	**0.64**
ISBA:NORTHERN IRELAND	**2.4%**	6,790	2%	5,080	2%	4,980	2%	5,010	2%	4,780	2%	**-4.6%**	**-230**	**0.83**
ISBA:SOUTHERN	**9.2%**	26,020	9%	33,330	13%	32,030	13%	32,980	13%	31,830	13%	**-3.5%**	**-1,150**	**1.43**
ISBA:SOUTHWEST	**3.0%**	8,480	3%	10,020	4%	10,030	4%	9,970	4%	8,250	3%	**-17.3%**	**-1,720**	**1.14**
ISBA:WALES & WEST	**7.7%**	21,780	8%	23,210	9%	21,010	8%	19,140	8%	17,900	7%	**-6.5%**	**-1,240**	**0.96**
ISBA:YORKSHIRE	**9.9%**	28,000	10%	24,000	9%	22,980	9%	21,990	9%	20,710	9%	**-5.8%**	**-1,280**	**0.87**
TOTAL		**282,820**		**255,990**		**250,680**		**245,940**		**241,130**		**-2.0%**	**-4,810**	

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

Visitor volume changes by ISBA region 2012 vs.2011



Appendix 4

French Staying Leisure Visitors by Region 2008-2012

	2008	*% market share*	**2009**	*% market share*	**2010**	*% market share*	**2011**	*% market share*	**2012**	*% market share*	**Change 12/11**
BRITTANY	11,350	35%	12,810	37%	13,650	37%	14,960	37%	14,520	39%	*-3%*
GREATER PARIS	5,930	18%	5,660	17%	6,070	17%	7,050	18%	5,860	16%	*-17%*
NORMANDY	4,750	15%	5,220	15%	5,630	15%	5,540	14%	4,780	13%	*-14%*
LOIRE VALLEY	5,610	17%	5,910	17%	6,030	17%	6,510	16%	6,100	17%	*-6%*
SOUTH EAST	810	3%	910	3%	1,190	3%	1,320	3%	1,230	3%	*-7%*
SOUTH WEST	810	3%	890	3%	910	2%	1,100	3%	940	3%	*-15%*
MEDITERRANEAN	620	2%	610	2%	600	2%	920	2%	590	2%	*-36%*
POITOU-CHARENTES	550	2%	530	2%	580	2%	680	2%	850	2%	*25%*
NORTH EAST	470	1%	490	1%	510	1%	600	1%	520	1%	*-13%*
NORTH	380	1%	500	1%	550	2%	510	1%	460	1%	*-10%*
PICARDY	470	1%	380	1%	320	1%	410	1%	360	1%	*-12%*
BURGUNDY	180	1%	170	0%	210	1%	220	1%	310	1%	*41%*
CHAMPAGNE	140	0%	180	1%	260	1%	230	1%	240	1%	*4%*
TOTAL	**32,070**		**34,260**		**36,510**		**40,050**		**36,760**		*-8%*

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 2008 - 2012

Type	Group	% Households	Type Description	% Households	2008	2009	2010	2011	2012	Index 2012
1	Alpha Territory	3.5%	Global Power Brokers	0.3%	0.4%	0.4%	0.4%	0.4%	0.3%	1.15
2			Voices of Authority	1.2%	1.7%	1.8%	1.8%	1.8%	1.9%	1.59
3			Business Class	1.5%	2.9%	3.3%	3.3%	3.4%	3.3%	2.20
4			Serious Money	0.6%	1.3%	1.4%	1.4%	1.5%	1.4%	2.41
5	Professional Rewards	8.2%	Mid-Career Climbers	2.3%	3.9%	4.0%	4.0%	4.0%	3.9%	1.71
6			Yesterday's Captains	1.8%	4.2%	4.3%	4.5%	4.3%	4.1%	2.22
7			Distinctive Success	0.5%	1.5%	1.6%	1.5%	1.6%	1.6%	3.43
8			Dormitory Villagers	1.3%	2.9%	3.3%	3.3%	3.3%	3.2%	2.51
9			Escape to the Country	1.3%	2.3%	2.4%	2.4%	2.6%	2.5%	1.89
10			Parish Guardians	1.0%	1.9%	2.0%	2.0%	2.1%	1.9%	1.95
11	Rural Solitude	4.4%	Squires Among Locals	0.9%	1.9%	2.1%	2.0%	2.0%	2.1%	2.45
12			Country Loving Elders	1.3%	1.7%	1.6%	1.6%	1.8%	1.6%	1.20
13			Modern Agribusiness	1.4%	1.6%	1.7%	1.6%	1.7%	1.5%	1.14
14			Farming Today	0.5%	0.8%	0.9%	0.9%	1.0%	0.9%	1.63
15			Upland Struggle	0.3%	0.4%	0.4%	0.4%	0.5%	0.4%	1.18
16	Small Town Diversity	8.8%	Side Street Singles	1.2%	1.1%	1.1%	1.1%	1.2%	1.1%	0.93
17			Jack of All Trades	2.0%	2.8%	2.5%	2.6%	2.5%	2.5%	1.24
18			Hardworking Families	2.6%	3.4%	3.4%	3.5%	3.3%	3.3%	1.24
19			Innate Conservatives	3.0%	4.6%	4.5%	4.6%	4.5%	4.7%	1.58
20	Active Retirement	4.4%	Golden Retirement	0.7%	1.1%	1.2%	1.2%	1.1%	1.1%	1.70
21			Bungalow Quietude	1.8%	2.4%	2.3%	2.3%	2.2%	2.2%	1.25
22			Beachcombers	0.6%	0.8%	1.0%	0.9%	0.9%	0.9%	1.47
23			Balcony Downsizers	1.3%	1.0%	1.1%	1.2%	1.1%	1.2%	0.91
24	Suburban Mindsets	11.2%	Garden Suburbia	2.1%	3.7%	3.9%	3.7%	3.9%	3.8%	1.80
25			Production Managers	2.6%	4.1%	3.9%	4.1%	3.9%	3.8%	1.46
26			Mid-Market Families	2.7%	2.9%	2.7%	2.6%	2.7%	2.7%	0.99
27			Shop Floor Affluence	2.7%	2.5%	2.4%	2.4%	2.5%	2.5%	0.91
28			Asian Attainment	1.0%	0.5%	0.4%	0.4%	0.4%	0.5%	0.49
29	Careers and Kids	5.8%	Footloose Managers	1.7%	2.4%	2.5%	2.4%	2.5%	2.5%	1.50
30			Soccer Dads and Mums	1.3%	1.4%	1.4%	1.5%	1.5%	1.4%	1.05
31			Domestic Comfort	1.1%	2.4%	2.5%	2.4%	2.3%	2.4%	2.19
32			Childcare Years	1.5%	1.4%	1.5%	1.4%	1.4%	1.4%	0.93
33			Military Dependants	0.2%	0.1%	0.1%	0.1%	0.1%	0.1%	0.66
34	New Homemakers	5.9%	Buy-to-Let Territory	1.8%	0.7%	0.7%	0.7%	0.6%	0.7%	0.41
35			Brownfield Pioneers	1.4%	0.6%	0.6%	0.7%	0.6%	0.6%	0.43
36			Foot on the Ladder	2.4%	1.8%	1.6%	1.5%	1.7%	1.6%	0.68
37			First to Move In	0.4%	0.1%	0.2%	0.3%	0.4%	0.4%	1.21
38	Ex-Council Community	8.7%	Settled Ex-Tenants	2.1%	1.2%	1.1%	1.1%	1.1%	1.0%	0.49
39			Choice Right to Buy	1.7%	1.7%	1.5%	1.6%	1.5%	1.6%	0.95
40			Legacy of Labour	2.7%	1.3%	1.1%	1.1%	1.1%	1.2%	0.44
41			Stressed Borrowers	2.2%	1.5%	1.4%	1.4%	1.3%	1.4%	0.63
42	Claimant Cultures	5.2%	Worn-Out Workers	2.3%	1.0%	0.7%	0.8%	0.7%	0.8%	0.34
43			Streetwise Kids	1.1%	0.4%	0.4%	0.4%	0.3%	0.4%	0.37
44			New Parents in Need	1.8%	0.4%	0.4%	0.3%	0.3%	0.4%	0.23
45	Upper Floor Living	5.2%	Small Block Singles	1.8%	0.3%	0.3%	0.3%	0.3%	0.3%	0.17
46			Tenement Living	0.8%	0.3%	0.3%	0.2%	0.3%	0.3%	0.33
47			Deprived View	0.5%	0.1%	0.1%	0.1%	0.1%	0.1%	0.14
48			Multicultural Towers	1.1%	0.3%	0.3%	0.4%	0.3%	0.4%	0.34
49			Re-Housed Migrants	1.0%	0.3%	0.3%	0.3%	0.3%	0.4%	0.37
50	Elderly Needs	6.0%	Pensioners in Blocks	1.3%	0.4%	0.4%	0.4%	0.4%	0.4%	0.32
51			Sheltered Seniors	1.1%	0.6%	0.4%	0.5%	0.4%	0.4%	0.40
52			Meals on Wheels	0.9%	0.5%	0.5%	0.5%	0.5%	0.5%	0.56
53			Low Spending Elders	2.7%	1.5%	1.4%	1.4%	1.4%	1.3%	0.50
54	Industrial Heritage	7.4%	Clocking Off	2.3%	2.9%	2.8%	2.8%	2.7%	2.6%	1.16
55			Backyard Regeneration	2.1%	2.4%	2.2%	2.4%	2.3%	2.3%	1.11
56			Small Wage Owners	3.1%	2.4%	2.2%	2.2%	2.2%	2.1%	0.69
57	Terrace Melting Pot	7.0%	Back-to-Back Basics	2.0%	1.0%	0.9%	0.8%	0.9%	0.8%	0.43
58			Asian Identifiers	0.9%	0.1%	0.1%	0.1%	0.2%	0.1%	0.13
59			Low-Key Starters	2.7%	1.3%	1.2%	1.1%	1.0%	1.1%	0.42
60			Global Fusion	1.4%	0.7%	0.7%	0.7%	0.7%	0.8%	0.53
61	Liberal Opinions	8.5%	Convivial Homeowners	1.7%	1.7%	1.7%	1.7%	1.7%	1.8%	1.08
62			Crash Pad Professionals	1.1%	1.2%	1.3%	1.3%	1.2%	1.3%	1.23
63			Urban Cool	1.1%	1.2%	1.3%	1.3%	1.3%	1.5%	1.33
64			Bright Young Things	1.5%	1.0%	1.2%	1.1%	1.1%	1.3%	0.85
65			Anti-Materialists	1.0%	0.5%	0.4%	0.5%	0.5%	0.5%	0.52
66			University Fringe	0.9%	0.5%	0.6%	0.6%	0.6%	0.5%	0.56
67			Study Buddies	1.1%	0.2%	0.1%	0.2%	0.2%	0.2%	0.14

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 2008 - 2012

COUNTRY	Stay																				Average Stay				
	1 - 3 Nights					4 - 6 Nights					7 Nights					8+ Nights					Nights				
	2008	2009	2010	2011	2012	2008	2009	2010	2011	2012	2008	2009	2010	2011	2012	2008	2009	2010	2011	2012	2008	2009	2010	2011	2012
UK	38%	39%	41%	40%	41%	25%	25%	26%	28%	28%	29%	28%	26%	26%	25%	7%	8%	7%	7%	6%	4.8	4.8	4.7	4.8	4.7
IRELAND	35%	34%	38%	34%	38%	31%	27%	27%	28%	23%	29%	31%	26%	30%	31%	6%	8%	9%	7%	8%	4.8	5.0	5.0	5.0	4.9
OTHER CI	93%	91%	93%	93%	93%	6%	7%	6%	5%	6%	1%	2%	1%	1%	1%	1%	0%	0%	0%	1%	1.9	2.0	1.9	1.9	1.9
FRANCE	88%	89%	89%	88%	89%	8%	8%	9%	9%	9%	2%	2%	2%	2%	2%	2%	1%	1%	1%	1%	2.1	2.1	2.1	2.1	2.1
GERMANY	24%	25%	26%	23%	22%	28%	26%	24%	31%	19%	32%	33%	37%	34%	47%	15%	15%	14%	13%	12%	5.9	5.9	5.9	5.9	6.2
NORWAY	45%	32%	47%	57%	25%	34%	35%	20%	25%	11%	7%	20%	21%	8%	61%	14%	13%	11%	10%	3%	4.6	5.1	4.7	4.5	5.7
SWEDEN	25%	25%	41%	30%	61%	64%	58%	32%	30%	23%	8%	8%	11%	12%	10%	4%	8%	16%	28%	6%	4.0	4.3	4.8	6.7	3.7
HOLLAND	36%	37%	41%	41%	42%	29%	23%	26%	23%	26%	26%	26%	24%	28%	26%	9%	15%	9%	7%	7%	4.9	5.1	4.9	4.9	4.8
BELGIUM	53%	52%	52%	54%	53%	31%	32%	32%	32%	31%	11%	10%	11%	10%	14%	5%	6%	5%	4%	3%	3.7	3.7	3.7	3.7	3.9
SWITZERLAND	44%	44%	40%	36%	38%	27%	32%	30%	35%	33%	18%	13%	20%	19%	20%	11%	11%	10%	9%	9%	4.7	4.4	4.9	4.9	4.9
FINLAND	38%	40%	44%	60%	51%	44%	44%	42%	20%	35%	8%	7%	8%	10%	9%	9%	9%	5%	10%	5%	4.4	4.1	3.8	4.2	3.8
DENMARK	55%	57%	61%	65%	51%	35%	16%	17%	17%	21%	6%	19%	10%	12%	19%	4%	7%	12%	6%	8%	3.8	4.0	4.0	3.7	4.6
AUSTRIA	50%	54%	42%	50%	53%	20%	21%	20%	15%	19%	20%	16%	29%	29%	25%	10%	9%	10%	6%	3%	4.6	4.2	4.9	4.7	4.1
SPAIN	45%	48%	61%	63%	58%	36%	24%	23%	20%	25%	10%	6%	8%	8%	8%	9%	21%	8%	9%	9%	4.3	5.2	3.9	4.0	3.9
PORTUGAL	47%	45%	65%	49%	60%	25%	30%	19%	29%	15%	14%	7%	9%	8%	10%	15%	18%	6%	14%	16%	4.7	4.9	3.6	5.0	4.9
ITALY	46%	39%	64%	64%	59%	40%	54%	21%	19%	30%	6%	3%	8%	7%	4%	8%	4%	7%	10%	7%	4.3	4.2	3.5	4.0	4.0
CANADA	45%	47%	50%	47%	44%	30%	29%	30%	24%	28%	10%	7%	9%	9%	7%	14%	17%	11%	21%	21%	4.8	5.0	4.4	4.7	5.0
USA	53%	68%	71%	63%	63%	35%	23%	21%	25%	23%	6%	4%	4%	6%	8%	7%	5%	4%	6%	6%	3.9	3.3	3.1	3.7	3.6
AUSTRALIA	56%	59%	56%	58%	61%	26%	26%	29%	29%	25%	7%	7%	9%	8%	8%	11%	9%	6%	5%	6%	4.1	3.8	4.0	3.8	3.7
OTHER	58%	65%	62%	58%	59%	23%	21%	21%	24%	25%	7%	7%	11%	10%	9%	12%	7%	6%	8%	7%	4.1	3.5	3.7	4.0	3.8
TOTAL	45%	47%	48%	48%	49%	23%	23%	23%	24%	24%	25%	23%	22%	22%	22%	7%	7%	6%	6%	6%	4.4	4.4	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 2008 - 2012

COUNTRY											When booked															Travel				
	% Tour Operator					% First Time Visitors					< 1 month					1 - 3 months					> 3 months					By Air				
	2008	2009	2010	2011	2012	2008	2009	2010	2011	2012	2008	2009	2010	2011	2012	2008	2009	2010	2011	2012	2008	2009	2010	2011	2012	2008	2009	2010	2011	2012
UK	53%	52%	49%	55%	58%	43%	44%	47%	44%	44%	28%	29%	29%	29%	29%	37%	38%	37%	35%	35%	36%	32%	34%	36%	35%	82%	81%	81%	78%	82%
IRELAND	43%	41%	38%	45%	48%	46%	51%	50%	49%	45%	33%	33%	40%	36%	37%	39%	38%	34%	33%	32%	28%	29%	27%	30%	31%	97%	94%	94%	95%	95%
OTHER CI	50%	49%	42%	45%	48%	8%	10%	13%	11%	12%	62%	59%	60%	59%	56%	30%	32%	29%	29%	32%	9%	9%	11%	12%	12%	50%	51%	52%	45%	51%
FRANCE	61%	62%	61%	65%	67%	66%	60%	61%	61%	62%	61%	62%	60%	60%	56%	31%	31%	32%	32%	34%	8%	7%	8%	8%	10%	5%	10%	8%	6%	6%
GERMANY	62%	62%	65%	68%	73%	83%	78%	79%	78%	80%	23%	25%	22%	19%	19%	34%	36%	33%	34%	38%	42%	39%	45%	47%	43%	53%	58%	65%	65%	71%
NORWAY	38%	33%	35%	51%	80%	63%	63%	62%	39%	75%	26%	28%	31%	41%	35%	25%	37%	44%	40%	34%	49%	35%	25%	20%	31%	72%	75%	66%	71%	64%
SWEDEN	66%	66%	49%	58%	65%	70%	66%	57%	72%	61%	52%	31%	36%	29%	37%	21%	41%	42%	36%	40%	27%	28%	22%	35%	23%	34%	49%	65%	67%	68%
HOLLAND	56%	56%	55%	57%	59%	80%	74%	78%	80%	82%	32%	34%	35%	31%	32%	38%	35%	40%	40%	39%	30%	30%	25%	29%	29%	48%	51%	51%	53%	56%
BELGIUM	49%	50%	58%	60%	64%	78%	72%	72%	77%	69%	43%	42%	45%	39%	31%	36%	34%	32%	34%	35%	21%	24%	22%	27%	34%	28%	34%	35%	21%	31%
SWITZERLAND	55%	55%	59%	65%	61%	70%	63%	74%	63%	69%	41%	35%	39%	28%	30%	39%	43%	36%	41%	41%	21%	28%	25%	31%	29%	75%	79%	78%	77%	75%
FINLAND	58%	56%	55%	71%	67%	71%	76%	74%	61%	77%	58%	39%	64%	24%	42%	28%	41%	22%	59%	46%	14%	20%	14%	18%	12%	73%	70%	56%	62%	56%
DENMARK	42%	40%	32%	39%	50%	83%	62%	55%	64%	63%	42%	45%	37%	43%	32%	37%	32%	34%	31%	43%	21%	22%	29%	26%	25%	40%	57%	60%	51%	71%
AUSTRIA	56%	55%	47%	67%	77%	83%	73%	75%	68%	62%	23%	32%	23%	29%	28%	36%	38%	31%	46%	57%	41%	30%	46%	26%	16%	57%	68%	67%	60%	71%
SPAIN	35%	36%	39%	51%	41%	40%	51%	50%	51%	55%	49%	61%	59%	58%	52%	37%	21%	22%	24%	32%	14%	18%	19%	18%	16%	76%	77%	67%	55%	76%
PORTUGAL	30%	28%	25%	24%	23%	59%	45%	57%	42%	34%	76%	50%	64%	69%	53%	21%	42%	25%	21%	34%	3%	9%	11%	10%	13%	75%	90%	76%	92%	80%
ITALY	34%	33%	24%	32%	30%	76%	79%	67%	69%	72%	62%	61%	59%	56%	48%	27%	28%	28%	25%	34%	11%	11%	13%	19%	17%	57%	72%	49%	56%	71%
CANADA	48%	48%	44%	58%	56%	70%	59%	64%	66%	69%	37%	35%	34%	27%	33%	35%	42%	39%	41%	34%	29%	22%	27%	32%	32%	70%	83%	70%	75%	74%
USA	42%	41%	38%	40%	42%	73%	53%	68%	65%	61%	43%	45%	43%	41%	42%	35%	40%	40%	35%	34%	22%	15%	17%	24%	24%	82%	82%	78%	72%	78%
AUSTRALIA	45%	41%	37%	46%	48%	65%	57%	60%	67%	58%	42%	44%	38%	37%	39%	30%	34%	30%	33%	32%	28%	23%	31%	30%	28%	71%	71%	67%	67%	69%
OTHER	49%	47%	37%	41%	50%	64%	62%	58%	63%	60%	49%	46%	47%	44%	49%	34%	39%	34%	32%	31%	17%	15%	19%	24%	20%	77%	88%	82%	78%	85%
TOTAL	53%	52%	49%	55%	59%	46%	45%	49%	47%	47%	33%	35%	36%	34%	34%	36%	37%	34%	34%	35%	32%	28%	30%	32%	31%	72%	72%	71%	67%	71%

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

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

Appendix 8

Age Groups and Average Age - Profile of Staying Leisure Visitors 2008 - 2012

Age Groups (years)

COUNTRY	16 - 24					25-34					35 - 44					45 - 54				
	2008	2009	2010	2011	2012	2008	2009	2010	2011	2012	2008	2009	2010	2011	2012	2008	2009	2010	2011	2012
UK	3%	3%	3%	3%	3%	8%	8%	9%	8%	8%	14%	14%	13%	12%	12%	21%	21%	20%	20%	19%
IRELAND	4%	5%	3%	4%	4%	19%	19%	18%	16%	12%	19%	20%	18%	17%	18%	23%	18%	20%	21%	20%
OTHER CI	19%	18%	17%	18%	15%	22%	23%	22%	22%	21%	20%	20%	20%	19%	20%	18%	20%	19%	18%	21%
FRANCE	6%	6%	7%	7%	7%	16%	17%	15%	15%	15%	21%	22%	19%	20%	20%	25%	24%	26%	26%	24%
GERMANY	2%	2%	2%	2%	2%	8%	7%	5%	6%	5%	18%	19%	15%	13%	14%	24%	24%	27%	25%	29%
NORWAY	2%	3%	11%	12%	4%	5%	6%	9%	13%	9%	16%	15%	19%	21%	15%	26%	23%	27%	17%	22%
SWEDEN	2%	2%	6%	10%	3%	7%	7%	5%	9%	5%	12%	10%	14%	10%	12%	19%	29%	31%	22%	26%
HOLLAND	2%	2%	2%	3%	3%	9%	10%	6%	8%	7%	19%	18%	15%	14%	14%	27%	28%	29%	29%	25%
BELGIUM	4%	4%	6%	3%	3%	12%	10%	8%	12%	10%	18%	18%	19%	13%	16%	35%	33%	31%	32%	26%
SWITZERLAND	6%	5%	5%	2%	3%	13%	12%	11%	10%	9%	21%	22%	18%	16%	16%	23%	23%	22%	28%	29%
FINLAND	3%	3%	0%	24%	4%	9%	9%	18%	7%	15%	20%	25%	33%	31%	26%	45%	35%	37%	25%	28%
DENMARK	4%	5%	4%	5%	2%	6%	5%	6%	8%	6%	12%	11%	15%	14%	17%	31%	29%	17%	21%	26%
AUSTRIA	3%	2%	3%	5%	4%	7%	8%	8%	6%	8%	13%	15%	16%	13%	10%	25%	32%	25%	34%	25%
SPAIN	11%	9%	3%	6%	2%	19%	17%	8%	15%	10%	16%	22%	17%	19%	16%	19%	16%	29%	26%	16%
PORTUGAL	17%	15%	7%	6%	12%	33%	29%	29%	23%	26%	25%	21%	24%	17%	28%	13%	18%	27%	25%	14%
ITALY	10%	9%	9%	4%	7%	16%	18%	17%	17%	18%	38%	32%	17%	22%	26%	15%	20%	25%	23%	22%
CANADA	5%	4%	4%	3%	3%	6%	5%	8%	6%	5%	10%	9%	6%	7%	8%	14%	19%	17%	12%	16%
USA	0%	3%	4%	5%	2%	12%	9%	10%	7%	9%	17%	14%	10%	15%	13%	18%	22%	17%	12%	14%
AUSTRALIA	4%	4%	2%	2%	3%	12%	11%	9%	8%	8%	9%	10%	10%	8%	11%	18%	20%	15%	17%	17%
OTHER	16%	15%	8%	11%	11%	23%	22%	21%	22%	21%	17%	17%	17%	19%	14%	15%	13%	19%	17%	18%
TOTAL	4%	5%	4%	4%	4%	10%	9%	10%	10%	10%	15%	15%	14%	14%	14%	21%	22%	21%	21%	21%

COUNTRY	55 - 64					65 - 74					75+					Average Adult Age (Years)				
	2008	2009	2010	2011	2012	2008	2009	2010	2011	2012	2008	2009	2010	2011	2012	2008	2009	2010	2011	2012
UK	24%	24%	24%	23%	22%	19%	19%	20%	21%	22%	11%	11%	12%	13%	13%	55	55	56	56	56
IRELAND	20%	21%	23%	21%	22%	11%	12%	13%	14%	17%	4%	5%	5%	6%	6%	48	48	50	50	52
OTHER CI	12%	11%	13%	13%	13%	6%	6%	7%	7%	7%	2%	2%	2%	2%	2%	41	42	41	41	42
FRANCE	20%	20%	20%	20%	20%	8%	8%	9%	9%	10%	3%	3%	3%	3%	4%	47	46	47	47	48
GERMANY	21%	21%	24%	23%	25%	21%	21%	21%	24%	19%	6%	6%	7%	8%	7%	54	53	55	56	55
NORWAY	31%	32%	20%	17%	22%	17%	18%	10%	14%	22%	2%	3%	4%	5%	7%	54	50	48	47	54
SWEDEN	36%	35%	34%	27%	39%	18%	12%	10%	20%	11%	5%	5%	1%	3%	3%	55	54	51	51	54
HOLLAND	28%	26%	32%	31%	33%	12%	11%	11%	11%	14%	4%	5%	4%	5%	4%	51	51	53	52	53
BELGIUM	19%	20%	26%	24%	29%	9%	10%	8%	10%	11%	4%	5%	2%	6%	5%	49	48	49	51	52
SWITZERLAND	21%	22%	20%	23%	22%	10%	11%	17%	17%	16%	6%	5%	7%	5%	4%	49	49	52	52	52
FINLAND	15%	17%	4%	8%	20%	8%	10%	8%	5%	7%	0%	1%	0%	0%	0%	49	46	45	40	46
DENMARK	29%	32%	29%	32%	21%	12%	12%	25%	19%	26%	6%	6%	5%	2%	2%	52	55	55	53	53
AUSTRIA	19%	18%	21%	19%	26%	26%	20%	24%	17%	23%	7%	5%	4%	6%	4%	55	52	54	52	54
SPAIN	15%	16%	20%	13%	36%	15%	15%	18%	17%	12%	5%	5%	4%	4%	7%	48	49	52	49	54
PORTUGAL	9%	10%	9%	11%	10%	1%	5%	4%	17%	10%	2%	2%	0%	2%	0%	38	44	41	47	41
ITALY	14%	14%	20%	26%	16%	6%	6%	8%	8%	9%	0%	1%	4%	0%	1%	42	42	47	47	45
CANADA	27%	24%	24%	25%	20%	25%	24%	24%	25%	29%	14%	15%	16%	22%	20%	57	55	58	61	60
USA	23%	22%	25%	25%	26%	21%	20%	25%	29%	27%	10%	10%	10%	8%	8%	53	52	56	56	56
AUSTRALIA	28%	28%	30%	30%	29%	22%	21%	28%	27%	26%	7%	6%	6%	8%	6%	54	53	57	57	56
OTHER	16%	17%	19%	15%	19%	11%	12%	14%	11%	12%	3%	4%	2%	4%	4%	43	45	46	45	46
TOTAL	23%	23%	23%	22%	22%	17%	17%	18%	19%	19%	9%	9%	10%	10%	10%	53	53	54	54	54

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

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

Appendix 9

Accommodation Establishments by Category 2008 – 2012

	2008	2009	2010	2011	2012
Hotels	76	71	70	68	67
Guest Houses	42	43	42	44	43
Self-Catering	22	24	24	25	25
Campsites	4	4	4	4	3
Youth Hostel	1	0	1	2	2
Total	**145**	**142**	**141**	**143**	**140**

Accommodation Bed Spaces by Category 2008 – 2012

	2008	2009	2010	2011	2012
Hotels	9,746	9,045	9,199	9,189	9,089
Guest Houses	977	982	984	1,055	1,011
Self-Catering	674	760	922	870	928
Campsites	1,250	1,250	758	762	612
Youth Hostel	114	0	24	80	139
Total	**12,771**	**12,037**	**11,887**	**11,956**	**11,779**

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 2011 and 2012

2011	**Jan**	**Feb**	**Mar**	**Apr**	**May**	**Jun**	**Jul**	**Aug**	**Sep**	**Oct**	**Nov**	**Dec**	**Year**
Bed nights available	162,612	170,266	204,640	287,012	350,691	350,703	364,045	364,947	345,292	280,904	217,249	185,782	**3,284,143**
Bed nights sold	26,010	45,086	70,764	122,777	204,170	247,251	289,348	298,041	237,482	120,200	53,131	54,085	**1,768,345**
Total bed occupancy	**16%**	**26%**	**35%**	**43%**	**58%**	**71%**	**79%**	**82%**	**69%**	**43%**	**24%**	**29%**	54%
Hotel bed nights available	132,804	140,119	166,092	227,354	275,774	270,480	279,496	279,496	268,294	225,631	181,114	149,920	**2,596,574**
Guest House bed nights available	10,566	12,003	18,196	21,546	26,728	28,100	28,768	29,605	27,766	21,481	12,720	11,838	**249,317**
Serviced bed nights available	143,370	152,122	184,288	248,900	302,502	298,580	308,264	309,101	296,060	247,112	193,834	161,758	**2,845,891**
Unserviced bed nights available	19,242	18,144	20,352	38,112	48,189	52,123	55,781	55,846	49,232	33,792	23,415	24,024	**438,252**
Bed nights sold in serviced accommodation	22,710	40,666	65,529	108,694	170,423	207,830	246,782	251,334	203,186	104,309	48,127	46,886	**1,516,476**
Total bed occupancy in serviced	16%	27%	36%	44%	56%	70%	80%	81%	69%	42%	25%	29%	**53%**
Hotel bed nights sold	21,551	38,198	61,514	102,387	159,195	192,773	227,905	232,110	189,201	98,062	45,463	44,544	**1,412,903**
Guest House bed nights sold	1,159	2,468	4,015	6,307	11,228	15,057	18,877	19,224	13,985	6,247	2,664	2,342	**103,573**
Hotel bed space occupancy	16%	27%	37%	45%	58%	71%	82%	83%	71%	43%	25%	30%	**54%**
Guest House bed space occupancy	11%	21%	22%	29%	42%	54%	66%	65%	50%	29%	21%	20%	**42%**
Other bed nights sold	3,300	4,420	5,235	14,083	33,747	39,421	42,566	46,707	34,296	15,891	5,004	7,199	**251,869**
Other bed space occupancy	17%	24%	26%	37%	70%	76%	76%	84%	70%	47%	21%	30%	**57%**
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	202,477	230,527	260,242	283,809	226,566	112,394	56,274	54,121	**1,696,639**
Total bed occupancy	**18%**	**27%**	**36%**	**38%**	**57%**	**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	29,550	31,787	37,979	44,173	33,589	13,044	4,688	6,433	**236,106**
Other bed space occupancy	20%	31%	32%	31%	57%	61%	70%	80%	68%	40%	19%	25%	**50%**

Appendix 11

Room space occupancy 2011 and 2012

2011	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Year
Room nights available	76,765	80,219	97,121	131,195	155,875	154,942	160,555	160,949	153,918	129,286	101,389	86,795	**1,489,009**
Room nights sold	20,286	32,281	47,918	67,780	94,942	121,844	137,642	142,030	123,893	71,810	35,704	32,157	**928,287**
Room night occupancy	**26%**	**40%**	**49%**	**52%**	**61%**	**79%**	**86%**	**88%**	**80%**	**56%**	**35%**	**37%**	**62%**
Hotel room nights available	64,897	68,528	81,267	112,975	134,845	132,150	136,555	136,555	131,086	109,993	88,149	73,828	**1,270,828**
Guest House room nights available	5,088	5,938	9,125	11,442	13,249	13,930	14,198	14,694	13,758	10,474	6,096	5,619	**123,611**
Serviced room nights available	69,985	74,466	90,392	124,417	148,094	146,080	150,753	151,249	144,844	120,467	94,245	79,447	**1,394,439**
Other room nights available	6,780	5,753	6,729	6,778	7,781	8,862	9,802	9,700	9,074	8,819	7,144	7,348	**94,570**
Room nights sold in serviced accom	17,817	28,791	43,491	62,492	88,346	114,424	128,982	133,019	116,703	66,080	31,355	27,354	**858,854**
Total room occupancy in serviced	25%	39%	48%	50%	60%	78%	86%	88%	81%	55%	33%	34%	**62%**
Hotel room nights sold	16,725	26,786	40,291	57,775	81,789	105,706	118,231	122,698	108,646	61,979	29,820	25,854	**796,300**
Guest House room nights sold	1,092	2,005	3,200	4,717	6,557	8,718	10,751	10,321	8,057	4,101	1,535	1,500	**62,554**
Hotel room occupancy	26%	39%	50%	51%	61%	80%	87%	90%	83%	56%	34%	35%	**63%**
Guest House room occupancy	21%	34%	35%	41%	49%	63%	76%	70%	59%	39%	25%	27%	**51%**
Other room nights sold	2,469	3,490	4,427	5,288	6,596	7,420	8,660	9,011	7,190	5,730	4,349	4,803	**69,433**
Other room occupancy	36%	61%	66%	78%	85%	84%	88%	93%	79%	65%	61%	65%	**73%**
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	63,695	96,625	115,830	124,901	135,792	119,337	66,010	37,250	31,835	**894,823**
Room night occupancy	**30%**	**41%**	**49%**	**47%**	**62%**	**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	57,667	89,501	108,473	115,861	126,807	111,585	60,990	33,080	27,288	**818,820**
Total room occupancy in serviced	28%	37%	47%	45%	61%	76%	77%	84%	78%	51%	34%	32%	**59%**
Hotel room nights sold	17,248	26,103	38,364	53,996	82,863	100,903	106,469	117,549	104,652	57,307	31,555	26,238	**763,247**
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%	46%	62%	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	7,124	7,357	9,040	8,985	7,752	5,020	4,170	4,547	**76,003**
Other room occupancy	53%	75%	79%	69%	75%	77%	89%	89%	80%	57%	57%	60%	**73%**

Appendix 12

Jersey Link - Jersey Tourism Central Reservations 2008-2012

		Bookings	Bednights	Revenue	Value per Bednight
2008	**January**	330	2,822	£98,170	£34.79
	February	397	3,575	£122,891	£34.38
	March	374	2,888	£104,160	£36.07
	April	410	2,910	£110,190	£37.87
	May	536	3,649	£141,672	£38.82
	June	544	4,016	£162,969	£40.58
	July	576	4,004	£165,321	£41.29
	August	545	3,415	£134,739	£39.46
	September	309	1,584	£57,204	£36.11
	October	154	814	£25,491	£31.32
	November	106	589	£19,494	£33.10
	December	91	454	£14,531	£32.01
	Total	**4,372**	**30,720**	**£1,156,832**	**£37.66**
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**
	2012 vs. 2011	**-27%**	**-23%**	**-24%**	**-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

Total Passenger Arrivals 2008 - 2012

	TOTAL AIR ARRIVALS					TOTAL SEA ARRIVALS					TOTAL ARRIVALS				
	2008	2009	2010	2011	2012	2008	2009	2010	2011	2012	2008	2009	2010	2011	2012
JAN	43,417	39,895	35,659	38,680	39,735	6,669	6,800	7,432	8,138	7,905	50,086	46,695	43,091	46,818	47,640
FEB	49,938	42,565	42,376	41,755	39,339	10,057	9,002	9,559	10,660	11,022	59,995	51,567	51,935	52,415	50,361
MAR	60,822	52,914	52,865	50,441	53,117	12,484	11,686	12,350	14,804	15,590	73,306	64,600	65,215	65,245	68,707
APR	66,970	60,142	49,284	61,139	59,965	32,080	34,125	37,803	38,752	33,361	99,050	94,267	87,087	99,891	93,326
MAY	81,287	71,399	69,284	69,560	67,386	47,905	45,058	44,835	44,045	41,713	129,192	116,457	114,119	113,605	109,099
JUN	78,557	72,778	74,339	74,559	76,292	48,531	45,537	46,485	48,894	46,871	127,088	118,315	120,824	123,453	123,163
JUL	86,307	80,546	82,698	83,719	78,031	53,424	54,045	56,241	59,002	49,555	139,731	134,591	138,939	142,721	127,586
AUG	92,544	84,332	86,408	84,381	84,069	72,516	75,513	76,363	72,343	65,705	165,060	159,845	162,771	156,724	149,774
SEP	77,639	72,714	74,003	74,081	72,189	38,751	42,786	43,253	43,100	45,113	116,390	115,500	117,256	117,181	117,302
OCT	64,671	61,009	64,331	63,617	58,448	20,126	22,766	22,354	32,203	22,511	84,797	83,775	86,685	95,820	80,959
NOV	50,581	49,047	47,220	46,662	50,213	8,705	7,676	8,629	9,359	11,700	59,286	56,723	55,849	56,021	61,913
DEC	47,721	46,481	41,782	47,000	47,375	9,169	10,690	12,455	11,677	11,401	56,890	57,171	54,237	58,677	58,776
SUMMER	178,851	164,878	169,106	168,100	162,100	125,940	129,558	132,604	131,345	115,260	304,791	294,436	301,710	299,445	277,360
SPRING	226,814	204,319	192,907	205,258	203,643	128,516	124,720	129,123	131,691	121,945	355,330	329,039	322,030	336,949	325,588
AUTUMN	142,310	133,723	138,334	137,698	130,637	58,877	65,552	65,607	75,303	67,624	201,187	199,275	203,941	213,001	198,261
WINTER	252,479	230,902	219,902	224,538	229,779	47,084	45,854	50,425	54,638	57,618	299,563	276,756	270,327	279,176	287,397
YEAR	**800,454**	**733,822**	**720,249**	**735,594**	**726,159**	**360,417**	**365,684**	**377,759**	**392,977**	**362,447**	**1,160,871**	**1,099,506**	**1,098,008**	**1,128,571**	**1,088,606**

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 13.2

Passenger Arrivals from the UK 2008 - 2012

	TOTAL UK AIR ARRIVALS					TOTAL UK SEA ARRIVALS					TOTAL UK ARRIVALS				
	2008	2009	2010	2011	2012	2008	2009	2010	2011	2012	2008	2009	2010	2011	2012
JAN	35,850	32,077	29,064	31,864	32,363	1,453	1,337	1,664	1,982	1,838	37,303	33,414	30,728	33,846	34,201
FEB	41,709	34,985	35,193	35,120	32,672	2,062	1,753	2,454	2,372	2,714	43,771	36,738	37,647	37,492	35,386
MAR	52,244	44,470	43,912	41,808	44,573	3,238	3,401	3,335	3,171	3,505	55,482	47,871	47,247	44,979	48,078
APR	56,638	50,513	41,125	51,859	51,591	6,508	8,523	11,591	9,884	8,242	63,146	59,036	52,716	61,743	59,833
MAY	69,398	61,135	58,428	59,271	56,741	10,049	10,186	9,419	10,357	8,156	79,447	71,321	67,847	69,628	64,897
JUN	66,995	61,667	62,999	63,169	65,428	9,451	11,093	9,343	11,229	10,450	76,446	72,760	72,342	74,398	75,878
JUL	73,844	68,830	70,529	71,845	66,291	12,825	14,117	12,858	15,416	12,063	86,669	82,947	83,387	87,261	78,354
AUG	80,493	73,262	75,260	73,118	72,851	18,994	19,859	18,600	20,205	16,195	99,487	93,121	93,860	93,323	89,046
SEP	65,240	62,334	62,649	63,382	61,859	9,013	10,785	10,085	10,771	10,136	74,253	73,119	72,734	74,153	71,995
OCT	54,352	52,587	54,404	54,349	50,568	6,720	7,435	7,586	8,802	6,753	61,072	60,022	61,990	63,151	57,321
NOV	41,830	40,675	39,460	38,570	42,646	1,975	2,259	2,475	2,372	2,971	43,805	42,934	41,935	40,942	45,617
DEC	40,635	39,959	36,211	40,437	41,646	2,288	2,474	3,439	3,042	2,680	42,923	42,433	39,650	43,479	44,326
SUMMER	154,337	142,092	145,789	144,963	139,142	31,819	33,976	31,458	35,621	28,258	186,156	176,068	177,247	180,584	167,400
SPRING	193,031	173,315	162,552	174,299	173,760	26,008	29,802	30,353	31,470	26,848	219,039	203,117	192,905	205,769	200,608
AUTUMN	119,592	114,921	117,053	117,731	112,427	15,733	18,220	17,671	19,573	16,889	135,325	133,141	134,724	137,304	129,316
WINTER	212,268	192,166	183,840	187,799	193,900	11,016	11,224	13,367	12,939	13,708	223,284	203,390	197,207	200,738	207,608
YEAR	**679,228**	**622,494**	**609,234**	**624,792**	**619,229**	**84,576**	**93,222**	**92,849**	**99,603**	**85,703**	**763,804**	**715,716**	**702,083**	**724,395**	**704,932**

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 13.3

Inter-Island Passenger Arrivals 2008 - 2012

	TOTAL INTER-ISLAND AIR ARRIVALS					TOTAL INTER-ISLAND SEA ARRIVALS					TOTAL INTER-ISLAND ARRIVALS				
	2008	2009	2010	2011	2012	2008	2009	2010	2011	2011	2008	2009	2010	2011	2012
JAN	5,603	5,095	4,275	4,904	5,368	345	261	473	550	481	5,714	5,948	5,356	4,748	5,849
FEB	6,049	5,396	5,376	5,523	5,171	570	827	578	1,241	1,506	6,390	6,619	6,223	5,954	6,677
MAR	7,071	6,589	7,612	7,510	6,663	924	917	987	1,561	1,855	8,803	7,995	7,506	8,599	8,518
APR	7,249	5,705	5,644	6,074	5,824	3,553	4,063	3,005	5,631	4,939	10,892	10,802	9,768	8,649	10,763
MAY	7,052	5,635	6,360	6,693	6,079	7,583	7,259	7,148	7,651	8,066	13,358	14,635	12,894	13,508	14,145
JUN	7,143	7,023	6,534	7,027	5,839	7,257	6,440	5,690	7,141	7,488	14,416	14,400	13,463	12,224	13,327
JUL	7,019	6,221	6,587	6,749	6,749	7,827	8,994	8,507	11,533	8,298	14,006	14,846	15,215	15,094	15,047
AUG	6,372	5,313	5,760	5,801	5,723	11,089	12,943	12,221	13,660	11,696	18,368	17,461	18,256	17,981	17,419
SEP	7,243	6,564	7,012	6,888	6,284	5,340	6,210	6,400	7,487	6,861	13,925	12,583	12,774	13,412	13,145
OCT	7,389	6,694	7,020	6,756	5,832	2,496	2,383	2,897	6,369	3,783	11,000	9,885	9,077	9,917	9,615
NOV	7,058	7,131	6,801	7,403	6,371	631	706	1,236	1,775	1,304	8,632	7,689	7,837	8,037	7,675
DEC	5,380	5,385	4,592	5,441	4,709	1,158	1,504	1,987	1,818	1,904	6,311	6,538	6,889	6,579	6,613
SUMMER	13,391	11,534	12,347	12,550	12,472	18,916	21,937	20,728	25,193	19,994	32,374	32,307	33,471	33,075	32,466
SPRING	21,444	18,363	18,538	19,794	17,742	18,393	17,762	15,843	20,423	20,493	38,666	39,837	36,125	34,381	38,235
AUTUMN	14,632	13,258	14,032	13,644	12,116	7,836	8,593	9,297	13,856	10,644	24,925	22,468	21,851	23,329	22,760
WINTER	31,161	29,596	28,656	30,781	28,282	3,628	4,215	5,261	6,945	7,050	35,850	34,789	33,811	33,917	35,332
YEAR	**80,628**	**72,751**	**73,573**	**76,769**	**70,612**	**48,773**	**52,507**	**51,129**	**66,417**	**58,181**	**131,815**	**129,401**	**125,258**	**124,702**	**128,793**

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 13.4

Continental Passenger Arrivals 2008 - 2012

	TOTAL CONTINENTAL AIR ARRIVALS					TOTAL CONTINENTAL SEA ARRIVALS					TOTAL CONTINENTAL ARRIVALS				
	2008	**2009**	**2010**	**2011**	**2012**	**2008**	**2009**	**2010**	**2011**	**2012**	**2008**	**2009**	**2010**	**2011**	**2012**
JAN	1,964	2,723	2,320	1,912	2,004	4,871	5,202	5,295	5,606	5,586	6,835	7,925	7,615	7,518	7,590
FEB	2,180	2,184	1,807	1,112	1,496	7,425	6,422	6,527	7,047	6,802	9,605	8,606	8,334	8,159	8,298
MAR	1,507	1,855	1,341	1,123	1,881	8,322	7,368	8,028	10,072	10,230	9,829	9,223	9,369	11,195	12,111
APR	3,083	3,924	2,515	3,206	2,550	22,019	21,539	23,207	23,237	20,180	25,102	25,463	25,722	26,443	22,730
MAY	4,837	4,629	4,496	3,596	4,566	30,273	27,613	27,582	26,037	24,781	35,110	32,242	32,078	29,633	29,347
JUN	4,419	4,088	4,804	4,363	5,025	31,823	28,004	31,452	30,524	28,921	36,242	32,092	36,256	34,887	33,946
JUL	5,444	5,495	5,582	5,125	4,991	32,772	30,934	34,876	32,053	29,134	38,216	36,429	40,458	37,178	34,125
AUG	5,679	5,757	5,388	5,462	5,495	42,433	42,711	45,385	38,478	37,591	48,112	48,468	50,773	43,940	43,086
SEP	5,156	3,816	4,342	3,811	4,046	24,398	25,791	26,748	24,842	26,727	29,554	29,607	31,090	28,653	30,773
OCT	2,930	1,728	2,907	2,512	2,048	10,910	12,948	11,871	17,032	11,975	13,840	14,676	14,778	19,544	14,023
NOV	1,693	1,241	959	689	1,196	6,099	4,711	4,918	5,212	7,425	7,792	5,952	5,877	5,901	8,621
DEC	1,706	1,137	979	1,122	1,020	5,723	6,712	7,029	6,817	6,817	7,429	7,849	8,008	7,939	7,837
SUMMER	11,123	11,252	10,970	10,587	10,486	75,205	73,645	80,261	70,531	66,725	86,328	84,897	91,231	81,118	77,211
SPRING	12,339	12,641	11,815	11,165	12,141	84,115	77,156	82,241	79,798	73,882	96,454	89,797	94,056	90,963	86,023
AUTUMN	8,086	5,544	7,249	6,323	6,094	35,308	38,739	38,619	41,874	38,702	43,394	44,283	45,868	48,197	44,796
WINTER	9,050	9,140	7,406	5,958	7,597	32,440	30,415	31,797	34,754	36,860	41,490	39,555	39,203	40,712	44,457
YEAR	**40,598**	**38,577**	**37,440**	**34,033**	**36,318**	**227,068**	**219,955**	**232,918**	**226,957**	**216,169**	**267,666**	**258,532**	**270,358**	**260,990**	**252,487**

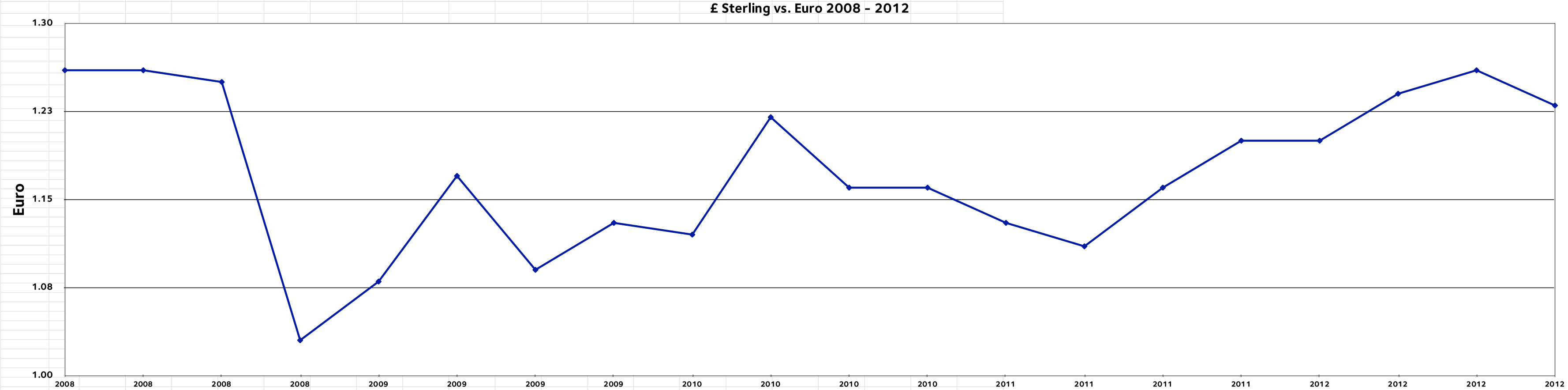
Figures are based upon detailed reports provided by the Harbour Office and Jersey Airport.
N.B. Figures are for all passenger arrivals and include returning residents, day trippers and business visitors.
Monthly totals are effected by the number of weekends that fall in a particular month.
Summer = July and August, Spring = April to June, Autumn = September and October, Winter = January to March and November to December

Appendix 14

Selected exchange rates against sterling since March 2008

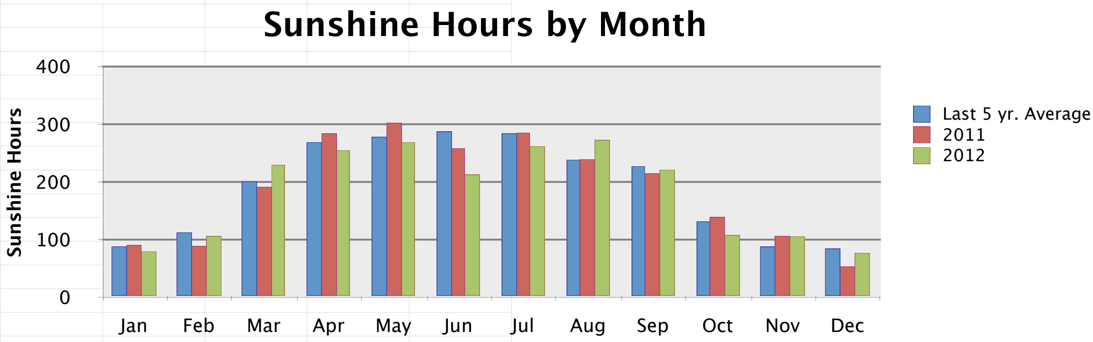
		Den	Nor	Swe	Swz	Euro	USA	Can	Aus	Japan
2008	Mar	9.41	10.17	11.85	1.99	1.26	1.99	2.03	2.17	198.35
2008	Jun	9.43	10.09	11.91	2.03	1.26	1.99	2.01	2.07	211.39
2008	Sep	9.35	10.44	12.19	1.98	1.25	1.81	1.87	2.22	189.73
2008	Dec	7.70	10.75	11.37	1.53	1.03	1.43	1.77	2.06	130.33
2009	Mar	8.04	9.68	11.85	1.63	1.08	1.43	1.80	2.06	141.57
2009	Jun	8.74	10.60	12.76	1.79	1.17	1.65	1.91	2.04	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

£ Sterling vs. Euro 2008 - 2012

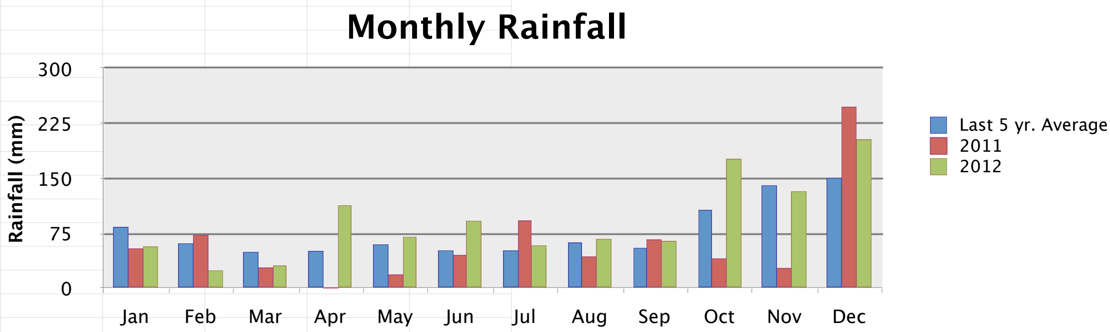


Source: www.xe.com

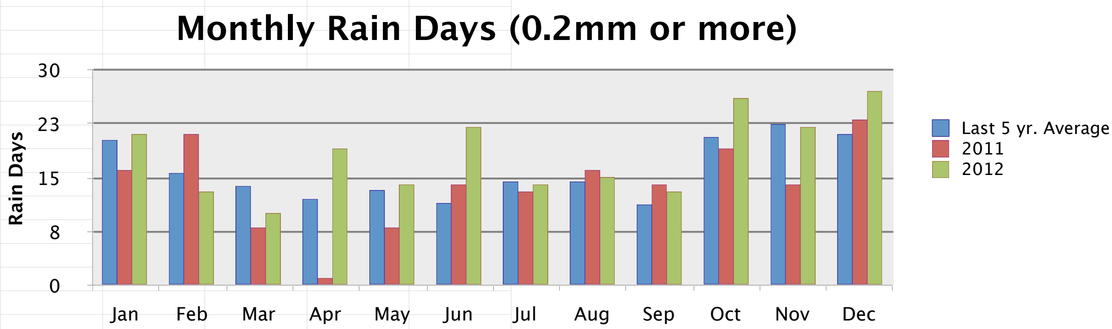
Appendix 15



Figures are recorded at Fort Regent



Figures are recorded at St. Louis Observatory



Figures are recorded at St. Louis Observatory

Source: Jersey Meteorological Department

www.jerseymet.gov.je

Appendix 16

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 19 YY

Nationality

SECOND ADULT (16+)

Surname

Forename

Nationality

THIRD ADULT (16+)

Surname

Forename

Nationality

FOURTH ADULT (16+)

Surname

Forename

Nationality

ARRIVAL DATE DD MM 20 YY

DEPARTURE DATE DD MM 20 YY

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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