

Jersey Tourism

A Year in Review 2011



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Jersey
Tourism

Jersey Tourism Annual Report

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Foreword from the Minister for Economic Development

It seems unbelievable that we have now been enduring the difficulties associated with the global financial crisis for 4 years and that during that time the Tourism Industry has both responded and in many areas flourished against the background of extreme economic difficulty. In 2011 business levels have been maintained overall and stimulated by growth from European markets whilst the quality of the Jersey product has continued to improve following significant levels of investment by a broad range of businesses within the sector.

Germany, which is Jersey's fastest growing market, produced an increase of 23% in staying leisure visitors taking the size of the market to over 13k producing an on-Island expenditure of £7.5m. This increase corresponded with a significantly enlarged flying programme during the Summer months from key German cities and looks set to continue to expand into the future. In France, Jersey's second fastest growing European source market, 40.5k staying leisure visitors were attracted, achieving a growth of nearly 10% producing an on-Island spend of £10.5m.

Both France and Germany are countries in which the Department has invested over long periods in marketing and where trade links have been developed to support these excellent performances.

Business visitors enjoyed growth on 2010 partly as a result of the early year. Supermarket fitting out accounted for significant numbers of room nights and for the remainder of the year maintained satisfactory levels to show an overall performance which was up on 2010.

The transition to higher quality accommodation is encouraging increased spend among our visitors and overall it is estimated that visitors of all categories spent £242m within the Island, underpinning the value of the sector to our economic well being as well as supporting the social infrastructure. This on Island expenditure will translate into £12m of tax revenue through GST, providing a good return on States investment.

Whilst the States of Jersey has been responding to the Comprehensive Spending Review which has been implemented to cover a 3 year period from 2011 to 2013 with cuts across all departments I have protected the Tourism budget in recognition of the very valuable contribution which the industry makes to our economy. It should also be noted that the sector employs an estimated 6k people and these jobs are vital at this time. I was also able to supplement the Tourism budget for marketing in 2011 with an additional £500k which was diverted from under spends from elsewhere in the Economic Development Department.

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 events. Sadly in 2010 poor weather prevented the air display from flying, particularly after all of the hard work had been undertaken and costs incurred.

I would like to take this opportunity of recognising the very valuable contribution to Tourism made by industry members to the Tourism Development Fund, the Jersey Conference Bureau and the Tourism Marketing Panel. It is vital that we continue to benefit from the expertise which is provided to these bodies which enables planning and decisions to be made with input from as broad a range of industry as possible. The Industry in Jersey is diverse and interrelated and no one sector would survive and prosper without the others. It is therefore vital that we continue to work in partnership to build on our many strengths which are enhanced by the quality and beauty of the Island coupled with the warmth of welcome which we consistently offer to our visitors.

I would also like to take the opportunity of recognising the contribution of my two Ministerial colleagues who served with me until the new Government was formed in December 2011, Connetable Len Norman and Senator Paul Routier who join me in thanking all of the departmental staff for their superb efforts throughout the year.

Senator Alan Maclean
Minister for Economic Development

2011 Annual Report

Against the background of reducing volumes of UK visitors taking overseas holidays and the ongoing unfavourable exchange rates for Sterling against the Euro Jersey performed well in the UK market.

With a strong advertising campaign led by national television and boosted by an additional £0.5m in early Summer the high season and autumn periods achieved particularly good results.

Length of stay averages were very similar to 2010, and in profiling terms the points of note were increases in the percentage travelling with a tour operator and those travelling by sea. Compared to 2010 the month of most improved occupancy was June, with November and December recording reductions perhaps indicating increasing the trend in seasonality.

Transportation

The arrival figures for 2011 show a healthy increase of over 30k and provide a potential indicator of confidence returning to the travel industry. Whilst these figures are a combination of all movements including local residents, and business visitors as well as leisure visitors they showed improvement for most months of the year by both air and sea. Inter-Island movements were particularly noteworthy with a 20k increase resulting in the highest ever recorded number of passengers.

From the UK air transportation has followed a similar pattern to previous years with some changes to operators on regional services but overall a comprehensive spread of services being maintained. The loss of the direct service to Plymouth following the closure of the airport will reduce capacity to the South West which has traditionally been a good source of business for Jersey.

Despite the loss of the direct Paris service the European network is expanding, resulting in increases from both Germany and Switzerland. Air capacity increased by 28% from Germany with additional support from Air Berlin and Lufthansa.

Passenger numbers from St Malo were affected by the cessation of the passenger ferry Jacques Cartier which ended in 2010 and which brought good volumes of French day excursionists.

The German Market

Out performed all other market segments in terms of volume increases in 2011 which is particularly welcome for the visitor economy as German visitors stay for an average of 5.9 nights and spend an average of £565 during their stay.

The increases were generated by a number of complimentary factors including increased flight capacity by Lufthansa & Air Berlin whose schedules encouraged longer duration stays whilst larger aircraft led to 28% capacity in 2011 compared to 2010

Trend Tours a new tour operator for Jersey provided nearly 1,500 German guests with Flybe in 2011 with flight connections via the UK.

An additional radio campaign in the Frankfurt catchment area generated increased booking volumes for TUI Wolters charter service.

Tui Wolters and Detour, Jersey's main tour operator partners in Germany produced excellent results in 2011 and are anticipating further growth in this market in 2012.

Industry Events

A programme of events, each with a specific interest, was introduced to bring members of the industry together to discuss specific items of interest. The full list undertaken in 2011 is shown below. As these have all been offered to the industry free of charge and at cost to Tourism they represent a significant learning opportunity for which greater numbers of participants might have been expected. The programme will be continued in 2012 as the programme provides a significant benefit for those who attend.

2011 Speaker Series

Meet the team event - 18 January

Tourism Speaker Series - How do Jersey visitors search online - Hitwise - 11/5/11

Tourism Speaker Series - Social Media Revolution in Travel - VB 25/5/11

Tourism Speaker Series - The Olympics - Golden Opportunity or Serious Threat? The Tourism Business 6/8/11

Come and meet... The Daily Mail 12/7/11

Jersey Travel Survey

After a gap of 4 years, a year long travel survey covering all of Jersey's visitors was commissioned to provide up to date information on visitor volume and expenditure. The study will be undertaken as an exit survey at the Ports of Jersey and will as a minimum provide detail on the following. The results will be available at the end of 2012.

- Determine the passenger composition of each of Jersey's main air and sea transport routes by season and across the year
- Consolidate this information in order to calculate visitor volume over a one-year period, broken down into different visitor segments
- Provide information on resident travel movements on each main route
- Evaluate detailed visitor expenditure broken down by different, specified visitor segments
- Determine the prices paid by visitors for travel to and from the Island
- Provide basic profiling information for visitor segments (age, party size, country of residence, average stay, how they booked and travelled)

David de Carteret

Director of Tourism & Marketing

Marketing – 2011 Annual Report

Advertising Campaign

In order to increase Jersey's visibility and appeal as a holiday destination, Jersey Tourism's marketing communications strategy significantly changed in 2011 to reflect a shift towards TV advertising. This resulted in a major investment in this media channel, with reductions in other media choices, most notably national press advertising.

To support the TV commercial, new footage was filmed and local singer/songwriter, Nerina Pallot, agreed to provide the soundtrack from her single 'butterfly' and the voiceover. The advert also introduced a new positioning statement for Jersey, 'the warmest place in the British isles'.

The gross value of the TV campaign was in excess of £1.2 million and was bought in a declining market as the ongoing global recession continued, achieving great value for money in terms of media exposure. This level of investment into TV resulted in a reduction in press advertising by nearly 78%. The TV campaign commenced on 10 January and with the help of additional funding, continued until mid-July.

This proved to be a successful strategy. Reach estimates for the TV campaign were exceeded in all areas of the country, with an overall coverage of 7.5 million ABC1 55+ adults. 93% of this target audience saw the Jersey ad, on average, 12 times each. Across the broader market, the campaign reached a total of 22 million ABC1 adults, who on average, saw the ad 9 times each.

Advertising tracking research showed that prompted ad awareness increased across all target groups by 3%, with the biggest increase being in the post-family audience which increased by 4%. This research also showed one of the best unbranded recalls over the past 5 years, with 25% of UK adults remembering the TV ad. This research also recorded the highest spontaneous perception of Jersey for 'nice beaches' followed by 'expensive'. References to 'warm weather' and 'sunny' also showed marked increases, both featuring in the campaign.

Although the press campaign was much smaller than in previous years, it still played a key role in supporting TV and some brand press advertising took place in the early part of the year. In addition to this, Jersey Tourism provided subsidised advertising opportunities for the industry. Ten partners took up this opportunity during the year and 121 ads were placed in 8 national titles with partners contributing £32,000.

The campaign was also supported by a year-round e-marketing programme, with 11 emails campaigns, amounting to 835,000 messages, to previous enquirers and visitors, 15 partners participated and contributed £10,400. The most popular and cost effective advertising provided for partners during the year was the special offers pages on Jersey.com. 13 partners booked year-round ads, as well as many more ad-hoc offers throughout the season.

The overall campaign was complemented by dedicated brochure response advertising, joint promotions and marketing with transport providers and tour operators, search engine optimisation and online advertising, social media and key exhibitions.

JerseyPass

JerseyPass continued to expand during its third year of operation, this scheme having been designed to support Jersey's attractions in one comprehensive marketing scheme. The scheme supported 16 attractions in 2011 and created nearly 27,000 visits.

- Total Passes Sold: 4,595
- Total Number of Visits: 26,968
- Total Number of Pass Days: 19,253
- Total Value of Passes Sold: £185,000
- Number of Visits per Day: 1.40

Retail pricing of the cards was maintained at the same level as 2010 in order to drive footfall into attractions and achieved a 3% increase in revenue over the year.

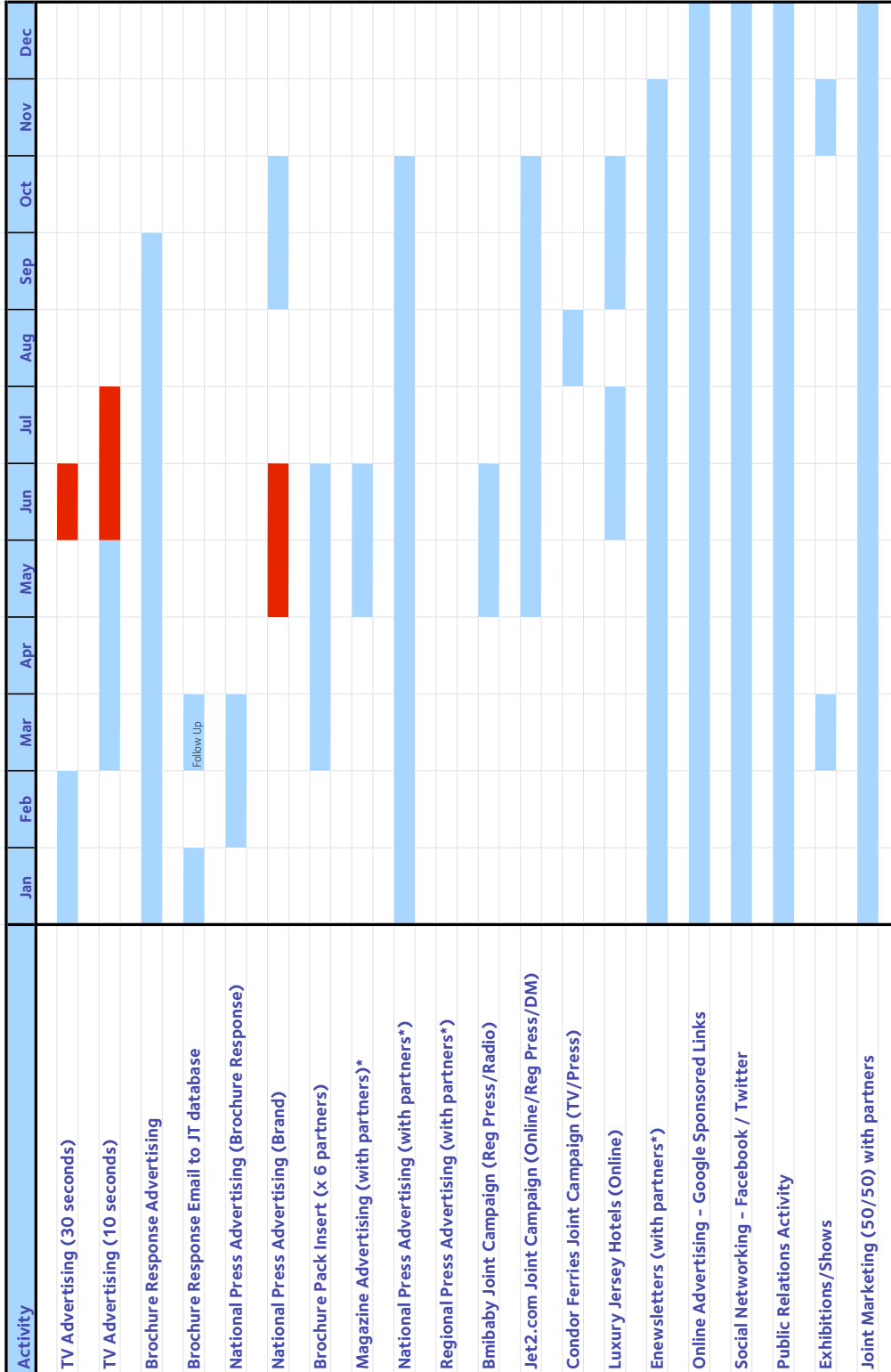
Jersey Link

Jersey Tourism operates an online accommodation booking system primarily for staying leisure visitors. The system has an agent interface via the Visitor Centre for customers wishing to enquire and book by telephone or in person. This central reservations system (CRS) is branded as 'JerseyLink' and had been in place since 1994 allowing contracted accommodation proprietors (approximately 87% of Jersey's establishments) to access the system via a secure web based administration system to login and sell their accommodation; using Jersey Tourism as an intermediary.

The software driving the system was updated in 2011. The previous system had served the industry well for many years and was a proven application, particularly in the manner in which it interfaced with www.jersey.com, but in light of changes to business operations on the internet, the technology needed to be replaced to reflect new business practice .

The new operating system also provided a solution to the corporate requirement to meet PCI Compliance standards, whilst search engine visibility was improved and the usability of the system was also improved to meet customers expectations. The new software also provided greater control to proprietors whilst reducing the administrative burden on Jersey Tourism in managing the system. The provider of the system, NVG, is a UK based firm specialising in software solutions for the Tourism industry and since going live in October 2011 has help as significantly increase online presence and drive traffic and sales into Jersey.com.

JERSEY TOURISM 2011 UK CAMPAIGN ACTIVITY



* Subject to demand
Additional Funding

Public Relations Activity

The public relations team celebrated another successful year of editorial coverage in 2011, with campaigns undertaken primarily in the UK, Ireland, France and Germany. Other international activity was conducted principally with industry partners and VisitBritain, the national agency promoting incoming tourism to Britain.

A key element of the PR campaign is the facilitation of media to the island. In 2011 the team facilitated visits covering 125 print media, 16 TV & 5 radio productions and 23 on line. Other international media visits included those from Holland, Belgium, Austria, Switzerland, China and the USA.

UK

The focus was to continue to communicate the sense of vitality about Jersey as an island, deliver a clearer sense of “brand Jersey” by finding some unpredictable ways of delivering the well-known, and add some more unexpected and less predictable layers of communications.

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

Amongst the outstanding highlights ITV1 Jersey featured in a ‘Country Wise’ episode in June on ITV, where Paul Heiney, historian Bettany Hughes, horticulturist Rachel de Thame and chef Mike Robinson explored the island and praised it for its local produce and scenery.

The weather campaign challenging Jersey the right to the claim “warmest place in the British Isles” continued to generate high levels of exposure and the innovative Inaugural Mymemory.com World Beach Art Championships achieved extensive international exposure that is due to yield further benefit in 2012 with programmes scheduled for broadcast on BBC Coast in Spring

Summary of exposure

- 725 articles generated
- Advertising equivalent value £7,132,294
- 563,311,201 opportunities to see
- Cost per thousand opportunities to see £0.30 a reduction of 9 pence
- 65% of all UK adults were reached by the coverage. The audience most reached was one of our key target audiences, empty nesters, those whose children have left home.

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

- 44% with a core message
- 59% with a brand message
- 74% with a call to action

What was said:

- “The rosettes, alongside two Michelin-starred restaurants have now confirmed the Island’s image as what it calls a ‘culinary powerhouse’ and has the most AA awards by head of population.”
Travel Daily
- “Just a 45 minute flight away from London, I’d found a small and perfectly-formed paradise.”
Sunday Daily Star

Key stories

- EasyJet, the UK's biggest airline in terms of passenger numbers, classifies Jersey airport as category B, which translates as 'slightly out of the ordinary'.
- EasyJet is to operate flights from Glasgow to Jersey during the summer three times a week.
- Tourism officials from the Isles of Scilly lodge a complaint about Jersey Tourism's claim that it is the warmest place in the British Isles.
- The Channel Island Way guidebook is launched, showcasing the best routes for walkers who are island hopping; 48 of the walks apply to Jersey and enjoy frequent public transport access.
- The first ever Worldwide Beach Art Championships are held in Jersey.
- EasyJet launches a new route from London Southend to Jersey in May 2012.

Key findings

An average of 60 items per month were generated for Jersey Tourism. April was the most prolific month for coverage, generating 97 articles. Coverage was driven by a complaint lodged by tourism officials for the Isle of Scilly against Jersey's claim that they are the 'warmest place in the British Isles'. The story accounted for a quarter of pieces with some of the items also counting towards strongly unfavourable coverage for the month.

The volume of event coverage in 2011 exceeded the total from 2010 by 49 items.

Q2 was the most prolific quarter for coverage, outperforming the target, with items driven by the Liberation Day event and several strongly favourable reviews of Jersey: "During my stay I feasted on the best seafood I have ever tasted, including a delicious scallop risotto at Castle Green gastro pub in St Martin. I ate my meal while enjoying the glorious panoramic views of the Royal Bay of Grouville on my first night and was already planning to return to Jersey" (Eastern Daily Press).

The proportion of articles featuring a brand message in 2011 (59%) was well in excess of the yearly target (40%).

In line with the previous year, three quarters of coverage delivered at least one message, significantly exceeding the industry average for the leisure sector at 56% (source: Metrica Numbers).

'Sunshine Culture' was the most prolific brand message, appearing in 32% of coverage, while 'Perfect for Outdoor Folks' achieved the highest number of deliveries; both messages were driven by the Walking Festivals and featured mentions of 'short breaks' in 40% of items.

Half of coverage during the year featured a mention of a holiday type, the most prolific being 'short breaks' appearing in 38% of articles. 97% of items to include a holiday type also featured an impact measure.

'Family holiday' featured prominently over the summer months, peaking in July, with 18 mentions. Travel Weekly reports on the growing appeal of family holidays in Jersey, outlining its attractions and noting that the Island is also starting to appeal to younger people: "I went on a family trip [...] in May and was blown away by Jersey – it's a hidden gem on our doorstep" (Gail Herring).

One third of print articles featured photography, enhancing the quality of coverage for Jersey and the impact on the reader. 66% of print articles featuring an image were strongly favourable, 34 percentage points higher than the average for the year.

Three articles addressed the August Jersey murders. The potentially unfavourable impact of these pieces was minimised by quotations from local policemen who emphasised the rarity of such events and reaffirmed that the Island is "one of the safest places in the Western world" (The Times and The Times Online).

50% of 'Time Out/Indulgence' items were strongly favourable, while over a quarter of articles featured an event or festival: "The Battle of Flowers engenders a terrific sense of community throughout the parishes who compete to make the most artistically inspired float, bedecked in flowers cultivated on the Island" (Real Travel).

Strongly favourable 'Explore (Outdoors)' coverage included a feature in The Sun, noting that: "Jersey is an adrenaline-charged destination for the young, fit and fearless".

90% of articles containing an event also delivered at least one message, the most prolific being 'Thriving Creative Scene'.

The Liberation Festival achieved several favourable pieces, with the Guernsey Weekly Press noting that: "It's a great event for Channel Island Tourism too. Last year the festival attracted national and international coverage from music critics who were bowled over by both the quality of the acts and the beauty of the islands. The Liberation Music Festival is now a significant date in the cultural calendar of the British Isles".

October was the most prolific month in terms of event coverage, three quarter of items relating to the first edition of the World Beach Art Championships.

The Walking Festivals achieved coverage throughout the year, peaking in May and September, when the 'Walking Weeks' take place. Mentioned amongst the best walking festivals in the UK, hikers can choose between "woodland wanders, seaside strolls and foodie trails", with up to 55 guided tours.

October achieved a high proportion of event coverage (second most prolific month with 26 mentions), driven by the World Beach Art Championships, the first edition of which took place in Jersey.

Impact measures

74% of coverage featured at least one 'call to action' in 2011, maximising the tangible impact of coverage, and far exceeding the target of 65%. This also represents an 11 percentage point increase from 2010.

38% of coverage with an impact was strongly favourable. This is six percentage points higher than the average for the year, demonstrating the positive effect impact measures can have on coverage.

The proportion of articles to feature the brand URL (11%) was above the yearly target, boosted by recommendations of Jersey Walking Festivals.

Mentions of 'Jersey Tourism partners' peaked in Q2, featuring in over two thirds of coverage.

42% of pieces concerning the Branchage Film Festival featured photography, while 82% included the 'Culture/Heritage' product cluster, boosting its favourability to 78% strongly favourable.

'Time out/indulgence' product cluster coverage to feature a photography was driven by the Liberation Day event and Walking Festivals.

16 items of broadcast were achieved during the year, including pieces on BBC1 (2,878,680 viewers), Channel 4 (863,604 viewers) and ITV (863,604 viewers).

TV Coverage

Jersey received significant TV coverage once again, some highlights include;

- ITV - "Country Wise" - Paul Heiney, historian Bettany Hughes, horticulturist Rachel de Thame and chef Mike Robinson explored the Island and praised it for its local produce and scenery.
- Channel Four - "Time Team" Secrets of Mont Orgueil castle and a WWII anti aircraft battery at the Jersey War Tunnels site were revealed to 2.1 million viewers over two programmes filmed in 2010 covering. It was also broadcast in Australia.
- BBC One - "Antiques Road Show" filmed at Samares Manor first was repeated.
- BBC One - "Saturday kitchen" saw Shaun Rankin & Mark Jordan back in action again with their culinary talents.
- ITV - "This Morning" - Presenter Phil Vickery took to the beach to cook a meal using locally sourced fish and produce.
- BBC Two - Digging for Britain filmed archaeologists discovering new finds in the La Cotte cave.

France

The Paris based public relations Agenda agency together with the in-house team achieved exceptional results.

During the year 75 items were generated, totalling a readership of 74 257 948;

- 1 TV programme (TF1)
- 3 radio programmes
- 40 on line articles
- 31 print articles
- National Press 18
- Regional Press 13

Highlights included items covering key product areas and subjects such as leisure cycling, walking, quirky historic accommodation, Grassroots festival, deluxe hotels, Jersey gardens, Summer festivals, Beach Art Championship, day trips, spas, Tennerfest and Fete de Noue.

Amongst the media titles were;

TF1 (1st TV station), Ouest France, Le Parisien, Version Femina, Le Figaro Magazine, Votre Beauté Magazine, tourmagazine.fr, La Manche Libre, Tour Hebdo, L'Écho Touristique, Vertu magazine, La Presse de la Manche, Weva, Grands Reportages, Maximoto, La Vie est Belle Voyages, Hôtel & Lodge, Ouestfrance.fr, Golf Européen, youvox.fr, Tendence Ouest radio, routard.com, Normandie Junior and Agence Bretagne Presse.

Germany

In 2011 the advertising and marketing campaign focused on radio, online activities and working with trade partners. Public relations was the main communication channel for print and TV. Activities ran nation-wide to increase the awareness and visibility of Jersey as a holiday destination for German visitors and regionally in areas served by direct flight connections.

Results

- 1,182 articles were published, a 30% increase year on year.
- Circulation achieved 118 million.
- Total advertising equivalent value achieved £5.5 million.
- 300 million opportunities to see were generated.
- The majority of the articles appeared in newspapers and online.
- January to June saw the greatest volume of coverage.
- 15% of all publications referred to journalist visits.
- 34% related to published press releases and feature stories.

All articles were extremely positive about Jersey.

Key Stories

- 39% featured the Motoring Festival.
- 45% reported the Battle of Flowers.
- Others included; Spring Walking Week, the My Memory World Beach Art Championship, the increasing number of German visitors to Jersey and flight connections.

TV & Radio broadcasts

- HR TV - 30 min regional TV programme about Jersey broadcast on 29th April in the Rhine-Main area.
- HR TV - "Service: Reisen". Repetition of a 30 minute film about the Channel Islands broadcast on 10th May.
- MDR TV - 43 minute film about Durrell Wildlife Conservation Trust broadcast on 5th August.
- 1 hour radio interview about Jersey, with Jersey's German PR representative, broadcast via Antenne Dusseldorf, and in all Air Berlin lounges to support nonstop flights with Air Berlin from Dusseldorf to Jersey.
- Journalist Reiner Veit produced a one hour radio feature about Jersey aired on 2nd July on RBB Inforadio, in Berlin and surrounding area.

Social Media

Increased activity with social media;

- Ongoing communication has resulted in the number of friends on the German Jersey Facebook account increasing by 627% from 111 to 1019.
- Twitter, by far less popular, was also used to communicate news to 65 followers.
- The leading weekly paper "DIE ZEIT" created an app for iPad and iPhone, with a free download sample using an issue with a major travel article. The article, which was written by Rüdiger Dilloo about Jersey, achieved over 37,000 downloads.

Product Development

The key Product Development function is to create activities and events that drive new business to Jersey, enhance visitors' on Island holiday experience and increase on Island spend.

The primary focus is on developing 'on brand' activity mainly in the shoulder months which is attractive to visitors – both potential visitors and those that have already chosen to visit. 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

Work continues on developing walking and cycling and 2011 saw the launch of the 'Channel Island Way' a 115 mile walk around five of the Channel Islands - Jersey, Guernsey, Alderney, Sark and Herm which has already delivered extensive pr opportunities including the National Geographic magazine and exposure in numerous walking blogs. This project was the first inter island development project for many years.

At the end of 2011, Jersey was invited to participate in Cycle West an Anglo/French cycling project which is being funded (€8 million) by the EU. The project aims to deliver three cycle itineraries; 'Velodysey' - a city to city route from Nantes, 'Tour de Manche' - a 700 km/430 mile route across northern France and the south west of the UK (e.g. Roscoff to Plymouth/Cherbourg to Poole) and 'Petit Tour de Manche' - which encourages cyclists to cycle from Saint Malo to Weymouth via Jersey. This project will involve participation in an extensive marketing/social media campaign across Brittany and the South West and Jersey will feature on the French and UK national cycling websites.

Annual Programmes of Activity

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

The annual guided walking programme, delivered in conjunction with the Jersey Tour Guides Association delivered over 300 guided walks per annum. The walks expose visitors to Jersey's heritage and culture including the occupation, food trails, heritage sites and access to private homes and gardens.

In 2011 Over 40 local farm and craft markets were staged in St Aubin and at the Weighbridge Place throughout the spring and summer. These provided animation, colour and activity and offered the visitor opportunities to purchase locally made goods and produce.

The team managed the Howard Davis Park music programme and 2011 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 which offers access to stunning private gardens rarely open to the public and Jersey's entry into the Royal Horticultural Society's 'Britain in Bloom' competition and the local competition 'Jersey in Bloom'. In 2011, seven parishes entered the competition. The overall winner of 'Best Parish' was the Parish of St Helier with a Gold Award and the winner of 'Best Coastal Parish' was the Parish of Grouville also with a Gold Award.

Festivals and Events

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

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

New for 2011 was the introduction of a Jersey Food festival. The festival was a week long celebration of the Jersey Royal new potato, seafood and dairy produce, highlights of which included fine dining in Michelin starred restaurants, low water rambles, foraging, food and ale trails, tutored tastings, brewery and dairy tours. The festival involved participation from Genuine Jersey and other local producers, Michelin starred chefs as well as businesses such as Albert Bartlett, Jersey Dairy and the local fishing industry and would not have been possible without the support and commitment from the local Tourism industry.

2011 was an important milestone in the history of Trinity Manor. It commemorated 100 years since the manor was extensively remodelled having been designed by the renowned architect Sir Reginald Blomfield (1856 – 1942) - one of the most successful and prolific of Edwardian architects. Owners Mr and Mrs Paul Bell invited the team to assist them in delivering a traditional 'Country Fair' in July. Highlights of the event included a horse show, produce and craft fair, beer tent with specially brewed Trinity Manor centenary beer, a food village and a programme of music and street theatre alongside more traditional pursuits such as coconut shy.

The walking festivals continued to deliver business to Jersey at very low costs and 1077 visitors took part in the spring event with 914 participants in the autumn event.

Then 2011 programme of events was delivered on time and within budget with large attendances despite bad weather at the International Air Display and La Fete de Noue.

Visitor Services Centre

Visitor & Retail

The visitor centre maintains a high quality free service to visitors seven days per week during the Summer months and in 2011 was open for 339 days.

While the total visitors number to the Island increased by 0.5% during 2011 on 2010 the centre recorded an increase of over 15% of those visitors using the Visitor Service Centre with over 18% of total arrivals to the Island in August of this year.

However, despite a slight increase in the amount of income to the centre the average spend per head reduced marginally to £2.10. These figures can be attributed in some part to the high numbers of young school groups visiting the centre that historically are not big spenders. But these statistics taken in the context of the current economic climate are being viewed positively.

During 2011, more products from the members of Genuine Jersey were secured to display and sell in the centre and these proved very popular especially the Christmas themed goods. The centre also started stocking the Diamond Jubilee and Olympic merchandise as, we understand, the first outlet in Jersey to do so and is currently the only official retailer for Team GB merchandise. .

Jersey Pass

This scheme proved beneficial to all those who participated. The visitors, attractions, retailers of the pass and also those who offered special value deals. We saw an overall increase in both sales of the pass and revenue collected as the pass becomes more widely known and recognised with sales in excess of £83k being recorded.

Guestlink System

2011 saw the transfer of the on line accommodation booking system transfer from Chantry to the Guestlink system. This system is widely used through UK Tourist Information Centres and has the capacity to interface with other booking engines, in effect giving hotels and guest hotels the ability to update their availability across more than one booking system at one time. This also gives the availability to sell by room, by person and can also accommodate hostel type accommodation so we are confident we will see an increase of traffic through our on line booking system during the next season.

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 increased by just over 1% from 9221 delegates to 9326 delegates.

The number of events was down to 258 compared with 292 the previous year. The number of association delegates rose from 3,816 to 4,012. The number of corporate delegates decreased from 5,405 to 5,314.

There were some notably high profile international conferences held in the Island including the International Whaling Convention, The Red Ensign Conference and The Federation of Small Businesses.

The number of bed nights sold increased marginally to 33,830 from 33,363. Association delegates tend to stay longer however their contribution to the local economy is not usually as large as corporate delegates.

The Jersey Conference Bureau is operated as a Public, Private Partnership with the majority funding being provided by the Economic Development Department.

Further information can be obtained from www.jerseyconferences.com

Association 4012. 19452 bednights Corporate 5314. 14378 bednights

Financial Report

	2011 Actual £000	2010 Actual £000
Corporate		
Strategy and Policy	461	587
Research and Planning	169	130
Communications		
Advertising and Media	2,003	2,176
Distribution	586	403
Marketing Services	281	572
Product Development	652	757
Market Development		
Public Relations	525	512
Trade Relations	677	668
Consumer and Media Relations	1,001	972
Visitor Services	266	385
Net Revenue Expenditure	£ 6,621	£ 7,162

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

Key Financial Results

Total revenue expenditure for 2011 was £6,621, a decrease of £541k (-7.5%) compared with 2010

Corporate expenditure decreased by £126k (-21%)

The decrease in Corporate Strategy and Policy expenditure was mainly due to a reduction in route development (71k). In addition, there was a reduction in the grant to Jersey Conference Bureau (£25k).

Communications expenditure decreased by £386k (-9.8%)

The decrease is mainly due to a reduction in brochure costs and in 2010 there was a provision made of £265k

Market Development expenditure decreased by £68k (-2.7%)

The decrease in Market development is partly due to a slight increase in sales in the Visitor Services Centre and a reduction in staff costs

Notes on Volume and Value Calculations

Visitor volume

In order to calculate total visitor volume estimates, a year-long exit survey is commissioned which covers all air and sea routes departing from Jersey. This was first undertaken between 1997 and 1998 and then repeated in 2003, 2005, 2007 and 2009. It is currently being undertaken again throughout 2012.

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

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

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

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

2011 visitor volume figures are based upon results from the 2009 exit survey.

Visitor expenditure

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

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

SUMMARY OF TOP-LINE FIGURES 2007 - 2011

	<u>2007 Jersey Travel Survey</u>		<u>2009 Jersey Travel Survey</u>			
	<u>2007</u>	<u>2008</u>	<u>2009</u>	<u>2010</u>	<u>2011</u>	<u>2011 vs. 2010</u>
On-Island Visitor Expenditure	£234 million	£239 million	£226 million	£229 million	£242 million	5.8%
On-Island Visitor Expenditure Reflated to 2011 levels	£270 million	£264 million	£243 million	£242 million	£242 million	0.0%
Total Tourism Visitor Volume	739,300	726,400	680,800	682,700	689,700	1.0%
Total bed nights sold over year	2.08 million	2.03 million	1.77 million	1.73 million	1.77 million	2.3%
Total room nights sold over year	1.03 million	1.00 million	0.86 million	0.90 million	0.93 million	2.9%
Staying Leisure Visitor Volume	375,900	362,300	338,500	332,600	334,400	0.5%
Staying Leisure Visitor Average Stay	4.6	4.4	4.4	4.3	4.3	0.2%
Staying Leisure Visitor On-Island Expenditure	£160 million	£158 million	£149 million	£148 million	£158 million	6.7%
Staying Leisure Visitor On-Island Expenditure Reflated to 2011 levels	£186 million	£176 million	£161 million	£156 million	£158 million	0.7%
Staying Business Visitor Volume	71,900	69,700	57,700	65,600	65,900	0.5%
Staying Business Visitor Average Stay	2.2	2.3	2.3	2.4	2.3	-4.7%
Staying Business Visitor On-Island Expenditure	£24 million	£25 million	£21 million	£26 million	£26 million	1.5%
Staying Business Visitor On-Island Expenditure Reflated to 2011 levels	£28 million	£28 million	£23 million	£27 million	£26 million	-4.2%
Staying Conference Visitor Volume	9,700	9,200	9,200	9,200	9,300	1.1%
Staying Conference Visitor Average Stay	3	4.0	4.1	3.7	3.6	-0.5%
Staying Conference Visitor On-Island Expenditure	£5.3 million	£5.5 million	£5.6 million	£5.6 million	£5.7 million	1.3%
Staying Conference Visitor On-Island Expenditure Reflated to 2011 levels	£6.2 million	£6.2 million	£6.1 million	£6.0 million	£5.7 million	-4.8%
Day Trip Visitor Volume	141,900	143,200	134,500	135,300	137,800	1.8%
Day Trip Visitor On-Island Expenditure	£7.5 million	£7.9 million	£7.7 million	£7.8 million	£8.5 million	8.3%
Day Trip Visitor On-Island Expenditure Reflated to 2011 levels	£8.3 million	£8.3 million	£8.0 million	£8.1 million	£8.5 million	3.9%
Hospitality sector <u>companies</u> tax revenue ¹	5.5 million	n/a	n/a	n/a	n/a	
Hospitality sector jobs ²	6,260	6,110	6,060	6,040	6,150	1.8%
Registered accommodation establishments	159	145	142	141	143	1.4%
Registered tourism bed spaces ³	13,100	12,800	12,000	11,900	12,000	0.6%
Total bed nights available over year	3,351,300	3,485,600	3,345,500	3,265,400	3,284,100	0.6%
Average yearly bed space occupancy	62%	58%	53%	53%	54%	1.7%
Average yearly room space occupancy	69%	65%	58%	61%	62%	2.5%
August bed space occupancy ⁴	84%	83%	81%	83%	82%	-1.2%
August room space occupancy	90%	87%	82%	91%	88%	-2.7%
Total booking revenue generated by JerseyLink	£1.6 million	£1.2 million	£1.1 million	£1.0 million	£1.1 million	4.7%
Total visits to www.jersey.com	n/a	920,300	1,287,700	1,451,900	2,025,700	39.5%

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

² 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 2011 (Statistics Unit). Again the hospitality sector alone does not constitute the full impact of tourism upon employment in Jersey.

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

⁴ Source: Google Analytics.

Jersey Tourism 2011

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

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

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

1. Tourism Volume and Expenditure Estimates

1.1 Introduction

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

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

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

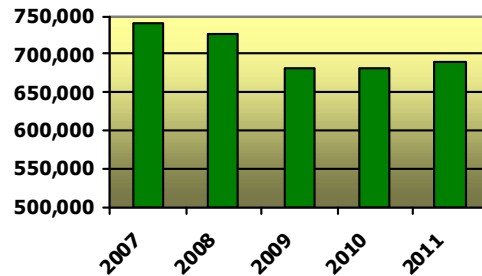
The following summary of 2011 results emphasises the importance and impact of the tourism industry in Jersey.

- 689,700 Visitors.
- 334,400 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 1.8 Million overnight stays (bed nights sold) in paid accommodation (excluding visiting yachts).
- £242 million estimated on-island visitor spend.
- £121 million estimated visitor spend on accommodation.

1.2 Total Visitor estimates

Figure 1 below shows that the number of visitors increased by 1% from 682,700 in 2010 to 689,700 in 2011, following an increase of 0.3% between 2009 and 2010.

Figure 1 Total visitor volume 2007-2011

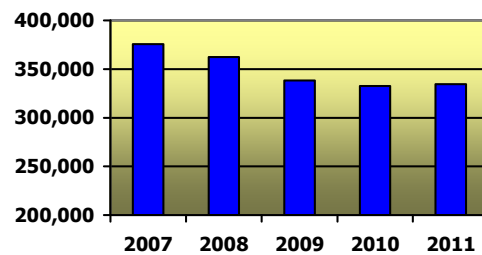


A full breakdown of total visitor numbers can be found in **Appendix 1** of the 2011 Annual Report at www.jersey.com/marketinginfo.

1.3 Staying Leisure Visitors

Figure 2 below shows how total staying leisure visitor volume increased by 0.5% from 332,600 in 2010 to 334,400 in 2011, following a fall of 1.7% between 2010 and 2009.

Figure 2 Staying leisure visitors 2007-2011



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

1.4 Visitors Staying with Friends and Relatives (VFR)

The number of visitors staying with friends and relatives increased by 2.9% from 98,600 in 2010 to 101,500 in 2011. In addition to this, circa 5% of leisure visitors staying in paid accommodation claim a visit to friends and relatives as their main purpose of visit, with a further 6% claiming this to be a secondary purpose (Staying Leisure Visitor Survey 2008).

Based upon the 2009 Travel Survey it is estimated that 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 2011

	<u>Volume</u>	<u>%</u>
UK	81,520	80%
Other CI	4,040	4%
Ireland	2,800	3%
France	2,910	3%
Portugal	1,510	1%
Other	8,690	9%

Those staying with friends and relatives spend slightly longer in Jersey than visitors in paid accommodation, with an average length of stay of 6.1 nights. The VFR market therefore accounted for 619,000 overnights stays (bed nights) in Jersey in 2011.

1.5 Language Students

Visiting language student numbers increased by 9% from 2,950 in 2010 to 3,200 in 2011.

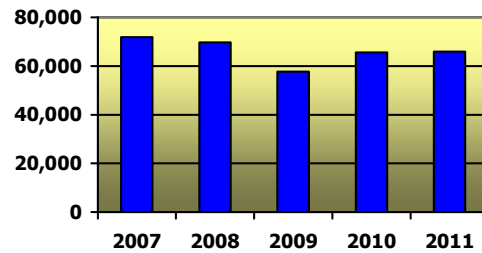
Language students in 2011 are estimated to have stayed in Jersey for an average of 13.8 nights, with the total market accounting for 44,100 nights. The majority of students stay with host families which puts a constraint upon the maximum size the language student market can achieve.

1.6 Business Visitors

The business market is estimated to have increased by 2.4% from 95,900 in 2010 to 98,200 in 2011.

In 2011 the number of staying (one or more nights) business visitors increased by 0.5% to 65,900, with business day visits increasing by 6.5% to 32,300.

Figure 3 Staying business visitors 2007-2011



The increase in staying business visitor volume, coupled with a decrease in average stay accounted for 148,300 bed nights sold, 4% less than in 2010.

Table 2 Staying business visitor volumes by market 2011

	<u>Volume</u>	<u>%</u>
UK	55,490	84%
Other CI	3,410	5%
France	1,630	2%
Ireland	630	1%
Other	4,740	7%

1.7 Visiting Conference Delegates

Residential conference delegate numbers increased by 1% from 9,220 in 2010 to 9,330.

The number of conferences decreased by 34 from 292 in 2010 to 258 in 2011. The number of Corporate delegates was 6,100, while the number of Association delegates was 3,300.

However, the number of bed nights sold increased by 0.5% from 33,700 in 2010 to 33,800.

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

1.8 Visiting Yachtsman

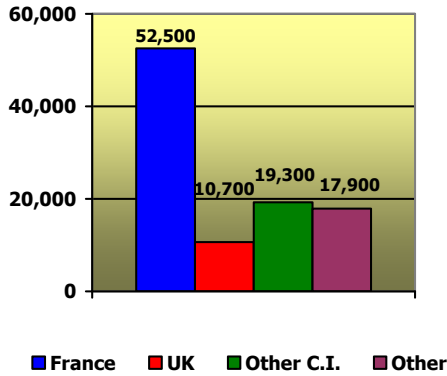
The number of visiting yachtsmen increased by 1% from 23,200 in 2010 to 23,400 in 2011, staying an average of 2.2 nights, the same as in 2010.

Further details can be obtained from Jersey Harbours. www.jersey-harbours.com

1.9 Leisure Day Trips

Leisure day trip visits increased by 1% from 99,900 in 2010 to 100,400 in 2011.

Figure 4
Breakdown of leisure day trip visitors by market



Source: 2009 Travel Survey

1.10 Visitor Expenditure Estimates

Total on-Island expenditure in 2011 is estimated at £242 million.

In real terms, if the total 2010 expenditure figures are reflatd to 2011 values, tourism expenditure in Jersey in 2011 was at the same level as 2010.

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

Table 3 Total visitor spend 2011 vs. 2010

	2010 value of market 000's	2011 value of market 000's	% change
Staying Leisure Visitors	£147,617	£157,533	7%
Visiting friends/relatives	£27,033	£29,113	8%
Language students	£2,678	£2,709	1%
Leisure day visitors	£5,493	£5,932	8%
Visiting yachtsmen	£2,091	£2,273	9%
Business visitors	£27,590	£28,174	2%
Conference delegates	£5,613	£5,685	1%
Other visitors	£10,689	£10,542	-1%
Total visitor spend	£228,804	£241,961	6%

N.B. 2010 figures are not reflatd.

Table 3 shows a breakdown of estimated on-Island visitor expenditure per visitor by visitor type 2011 vs. 2010.

Table 4 Spend per Visitor 2011 vs. 2010

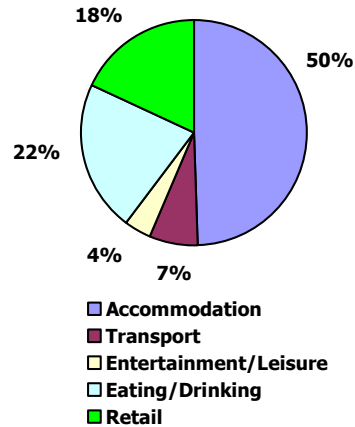
	2010 spend per visitor	2011 spend per visitor	% change
Staying Leisure Visitors	£444	£471	6%
Visiting friends/relatives	£274	£287	5%
Language students	£908	£847	-7%
Leisure day visitors	£55	£59	7%
Visiting yachtsmen	£90	£97	8%
Business visitors	£288	£287	0%
Conference delegates	£609	£610	0%
Other visitors	£525	£548	4%
Average spend per visitor	£335	£351	5%

N.B. Figures have been rounded.
N.B. 2010 figures are not reflatd.

Breakdown of on-Island visitor spend 2011

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

Figure 5 Breakdown of on-Island visitor expenditure 2011



Source: 2007 Visitor Expenditure Survey

The above shows that half of visitor expenditure is on the accommodation element of a stay in Jersey, although this percentage is reduced by visitors who do not stay in paid accommodation (VFR, day trips etc.). 22% of visitor expenditure is spent in restaurants, pubs and cafés, 7% on on-Island transport, and 18% on miscellaneous items which are mainly retail.

Visitor expenditure estimates are based upon the most recent visitor expenditure survey undertaken in 2007, but reflatd to 2011 using Jersey's RPI.

1.11 Tax Revenue

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

Table 5. Tax revenues from companies

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 reflatd for direct comparison with 2007.

No data has been provided subsequent to 2007.

2. Profile of Staying Leisure Visitors

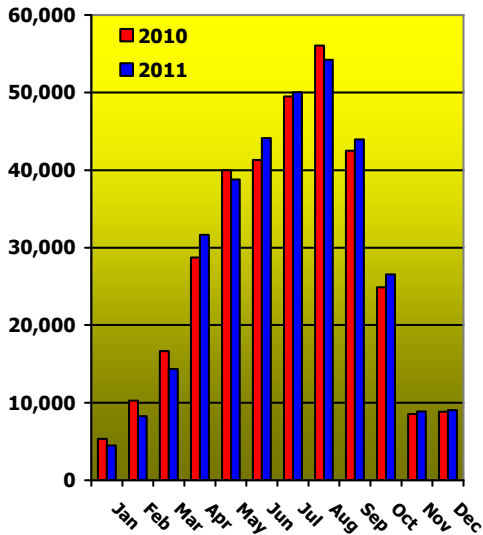
The following tables show **staying leisure visitor** trends, with the data derived from those visitors staying in registered accommodation that filled in visitor registration cards and stated that their main purpose of visit was "holiday" or "sport".

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 2011 started slowly, followed by a strong performance in April and June. Summer visitor numbers were similar to 2010, and the year ended strongly from September onward.

Figure 6 Staying leisure visitor arrivals by month 2010 and 2011.



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 - 2011 party composition.

	Adults (over 16)	Children (under 16)	Total Visitors
UK	223,980	15,500	239,480
Ireland	3,700	300	4,000
Other CI	17,580	1,520	19,090
France	36,080	4,510	40,580
Germany	12,700	560	13,260
Benelux	4,490	320	4,810
Other	12,410	790	13,200
Total	310,930	23,490	334,410

In 2011, children accounted for 7% of total staying leisure visitors, a slightly larger percentage than in 2010.

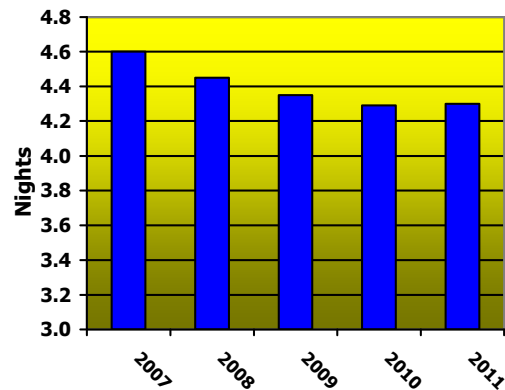
2.3 Average Length of Stay

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 2007 to 2011.

Figure 7 Staying leisure visitors – average stay 2007-2011



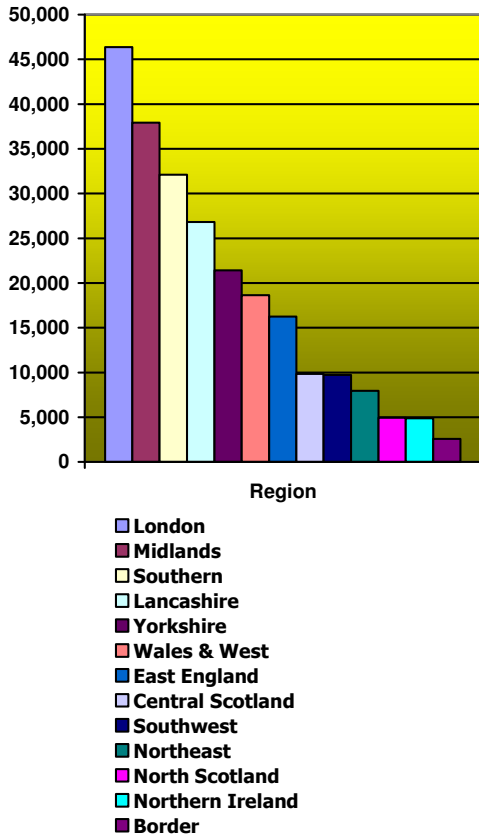
Source: Visitor registration cards

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 2011



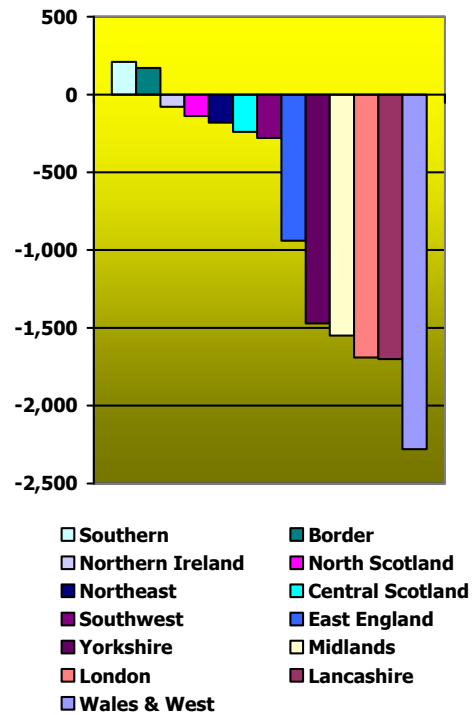
There have been some significant changes in the regional distribution of visitors by ISBA region between 2007 and 2011. These changes are partly reflective of the changes to capacity on certain routes and of some new routes being introduced, as well as discontinued routes.

Table 7 and Figure 9 opposite show the changes in volumes of visitors by ISBA region between 2011 and 2010.

Table 7 Visitor volume changes 2011 vs. 2010

Southern	210
Border	170
Northern Ireland	-80
North Scotland	-140
Northeast	-180
Central Scotland	-240
Southwest	-280
East England	-940
Yorkshire	-1,470
Midlands	-1,550
London	-1,690
Lancashire	-1,700
Wales & West	-2,280

Figure 9 Visitor volume changes 2011 vs. 2010



Compared to the UK's population distribution, Jersey had highest penetration in 2011 in the Southern and Southwest regions, followed by the Midlands, East England and Wales & West regions.

In 2011, 49% of Jersey's visitors came from the London, Midlands, and Southern regions.

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

2.4.2 France

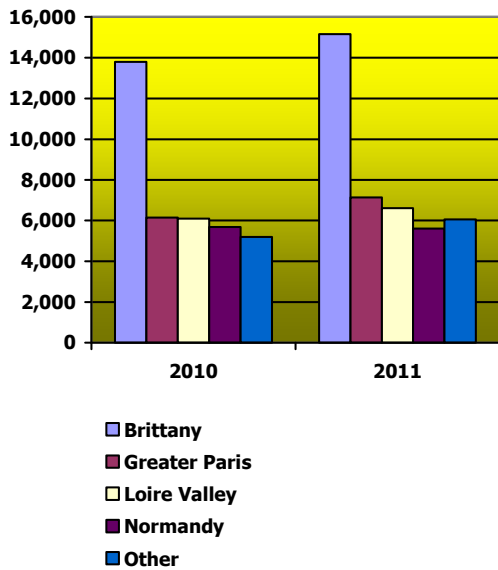
The first two digits of French postcodes from returned visitor registration cards have also been captured so that a continuous monitor of visitors from French Départements has been possible. Départements are grouped into French regions.

Table 8 and Figure 10 show the distribution of French staying leisure visitors between 2010 and 2011.

Table 8 French visitors by region 2011 vs. 2010

	2010	2011	Change 11/10	Change 11/10
Brittany	13,800	15,160	10%	1,360
Greater Paris	6,140	7,140	16%	1,000
Normandy	5,690	5,610	-1%	-80
Loire Valley	6,090	6,600	8%	510
South East	1,200	1,340	12%	140
South West	920	1,110	21%	190
Other	3,070	3,600	17%	530
Total	36,910	40,560	10%	3,670

Figure 10 French visitors by region 2011 vs. 2010



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.

Table 9 shows the geo-demographic profile of visitors to Jersey in 2011. 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 2011

MOSAIC Group	% UK Households	Jersey Visitors	Index 2011
Alpha Territory	3.5%	7.0%	2.0
Professional Rewards	8.2%	17.8%	2.2
Rural Solitude	4.4%	6.9%	1.6
Small Town Diversity	8.8%	11.3%	1.3
Active Retirement	4.4%	5.4%	1.2
Suburban Mindsets	11.2%	13.4%	1.2
Careers and Kids	5.8%	7.8%	1.3
New Homemakers	5.9%	3.4%	0.6
Ex-Council Community	8.7%	5.0%	0.6
Claimant Cultures	5.2%	1.4%	0.3
Upper Floor Living	5.2%	1.3%	0.3
Elderly Needs	6.0%	2.7%	0.5
Industrial Heritage	7.4%	7.2%	1.0
Terrace Melting Pot	7.0%	2.8%	0.4
Liberal Opinions	8.5%	6.6%	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 2010 and 2011. The average stay for UK visitors increased from 4.7 nights in 2010 to 4.8 in 2011, but the increase in volume of short stay French visitors brought down the overall average stay.
- The percentage of visitors booking their holiday through a tour operator was 55% in 2011; representing an increase from 49% in 2010, with 52% in 2009.
- The percentage of first time visitors in 2011 decreased from 49% to 47%. This figure had been consistent over the previous 4 years.
- In 2011 there was a decrease in the proportion of visitors booking at short notice, contrary to recent trends. 34% of visitors booked less than one month before arrival compared to 36% in 2010.
- Between 2007 and 2010 the percentage of staying leisure visitors travelling by air to Jersey consistently hovered around the 72-73% mark. However, in 2011 67% of staying leisure visitors travelled to Jersey by air. Again, this overall figure has been brought down by an increase in French visitors, 94% of who travelled by sea in 2011.
- There had been a gradual increase in the average age or age profile of staying leisure visitors in previous years. This trend reversed in 2003 with the overall average adult age dropping to 52 years and, since 2003 the average adult age has remained at 53 to 54 years. It is also noteworthy that UK visitors are generally older than most European visitors.

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

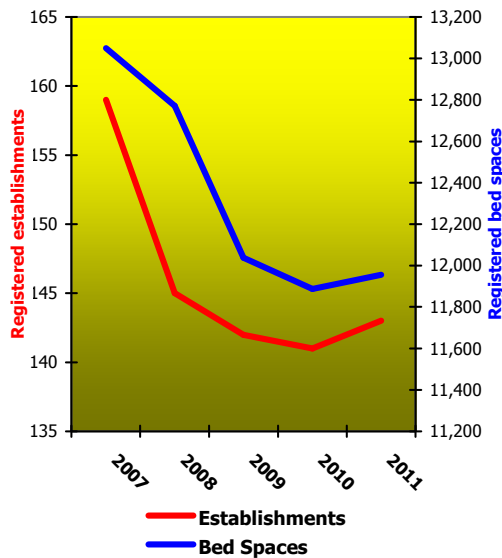
3. Registered Bed Stock

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

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

However, in recent years the decline has slowed, and this year the registered number of bed spaces has increased slightly.

Figure 11 Registered establishments and bed spaces 2007-2011



In 2011, Jersey had 143 registered establishments, representing almost 12,000 tourist bed spaces. Hotels accounted for 77% of the total bed stock in 2011.

Compared to 2010, the number of bed spaces increased for guest houses, camping and youth hostels. Despite a fall in self-catering spaces, there was an overall increase in registered tourist bed spaces.

Figures 12 and 13 demonstrate that the largest fall in bed spaces has occurred in the self-catering sector and that the largest fall in establishment numbers has been in the hotel sector. This has inevitably resulted in an increase in the average number of bed spaces per establishment from 82 in 2007 to 84 in 2011.

Figure 12 Distribution of bed spaces 2007-2011

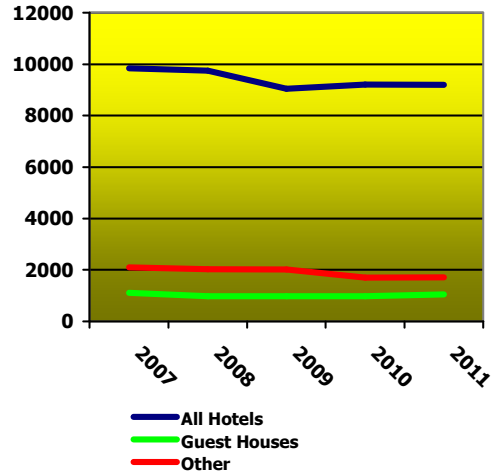
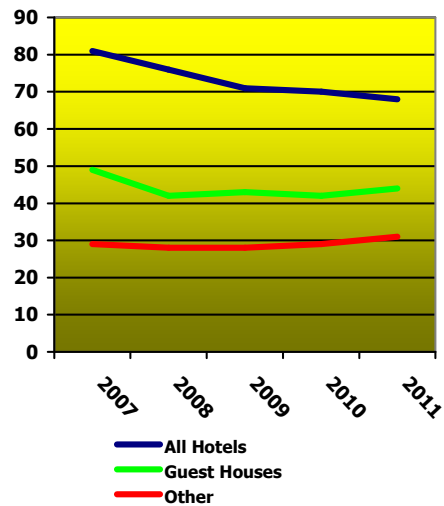


Figure 13 Distribution of establishments 2007-2011



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

4. Accommodation Performance Indicators

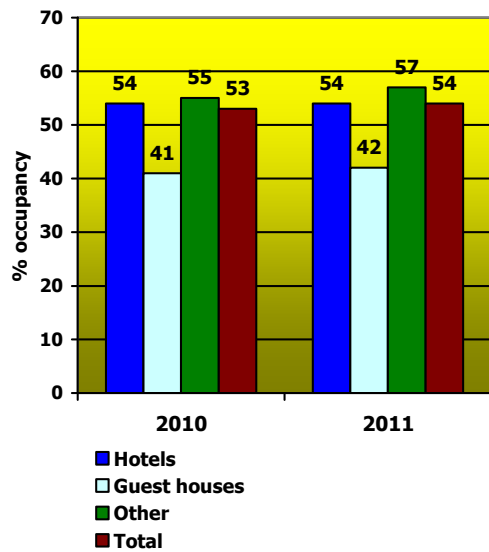
This section shows the performance in terms of bed and room nights sold, and occupancy levels achieved, in the accommodation sector.

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 2011 vs. 2010.

Figure 14 Bed space occupancy 2011 vs.2010

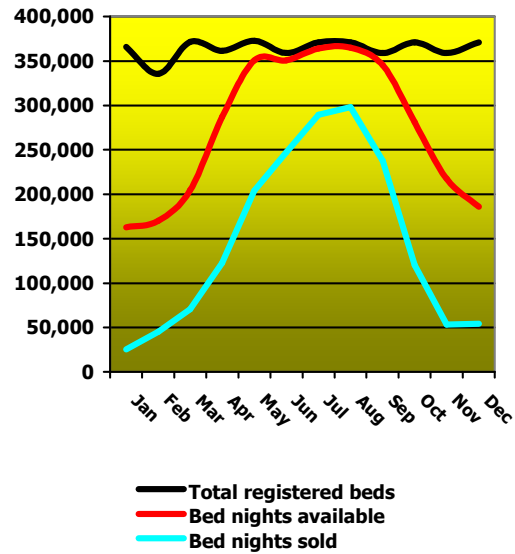


In 2011, total bed space occupancy averaged 54%, compared to 53% in 2010. Bed nights sold in all accommodation increased by 2.3% to 1,767,700 and total bed night availability increased by 0.6% to 3,284,100.

4.1.1 Monthly 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

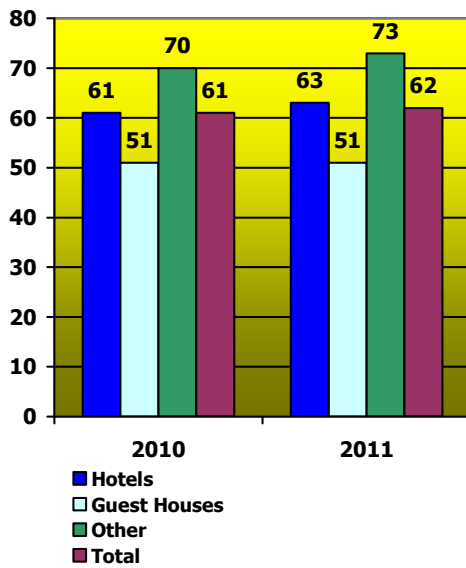


4.2 Room Occupancy

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 2011 vs. 2010.

Figure 16 Room space occupancy 2011 vs. 2010



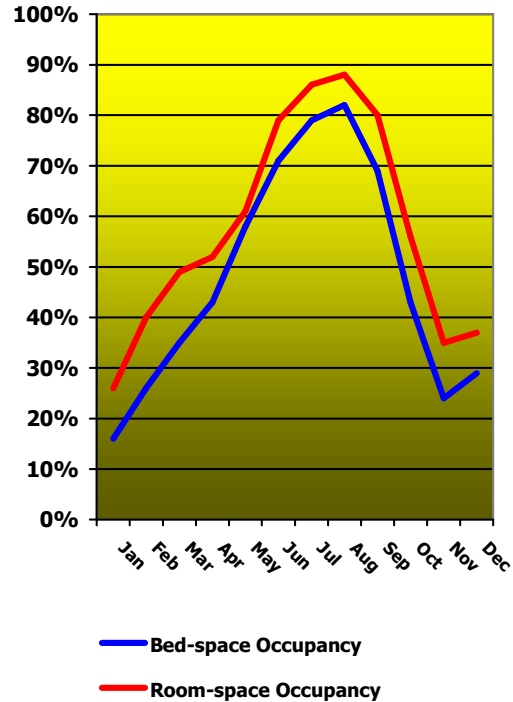
In 2011 total room occupancy averaged 62%; a slight rise from 61% in 2010. Rooms sold in all accommodation increased by 2.9% to 928,300 while total rooms available increased by 0.3% to 1,489,000.

*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 and conference tourism, where the majority of overnight stays are based on single rooms or single-occupied rooms; and represents a higher proportion of room sales compared to staying leisure visitors.

Figure 17 Bed and room occupancy 2011



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. Circ. 85% of Jersey’s registered bed stock is connected to the system.

Table 10 Jersey Link bookings 2011 vs. 2010

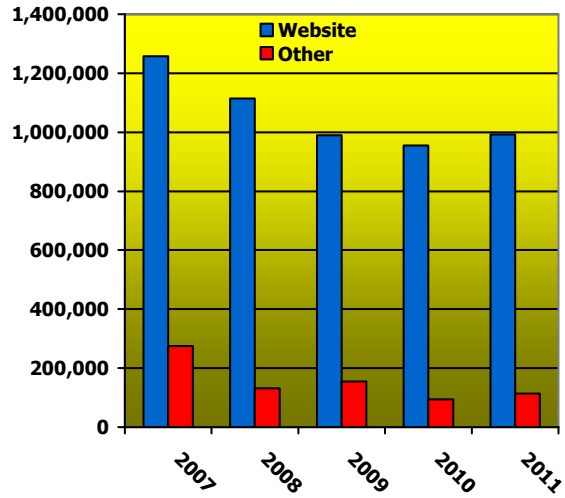
	2010	2011	11 vs. 10
Number of bookings	4,100	3,900	-4%
Number of bed nights	27,300	27,200	0%
Revenue	£1,049,300	£1,099,200	5%

The above table shows a 4% decrease in bookings, resulting in a marginal decrease in bed nights sold through the system. Revenue in 2011 increased by 5% to £1,099,200 compared to 2010, producing an average per person per night rate of £40.49, an increase on 2010 of £2.02 (+5%).

JerseyLink bookings accounted for 1.54% of total bed nights sold in 2011, compared to 1.58% in 2010.

NB: In October 2011, the software powering the JerseyLink system was replaced. Following an extensive tender process, the legacy software provided by Chantry 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 2007 – 2011



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

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 2011, there were over 2 million Visits to the site, compared to 1.4 million in 2010, and 1.42 Unique Visitors. 52% of site traffic in 2011 came from the UK, followed by 14% 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, 2009 - 2011

	2009	2010	2011
Visits	1,287,719	1,451,874	2,025,739
Unique Visitors	875,479	990,660	1,424,113

Visits to Jersey.com by Market, 2009 - 2011

	2009	2010	2011
UK	749,613	765,879	1,061,659
France	138,293	195,678	286,356
Germany	64,548	65,137	88,846

Source: Google Analytics

2011 saw 132,965 visits to Jersey.com by users of mobile devices, representing a 322% increase on 2010. The most popular devices being used were Apple's iPad and iPhone. This trend is expected to continue apace in 2012 and beyond.

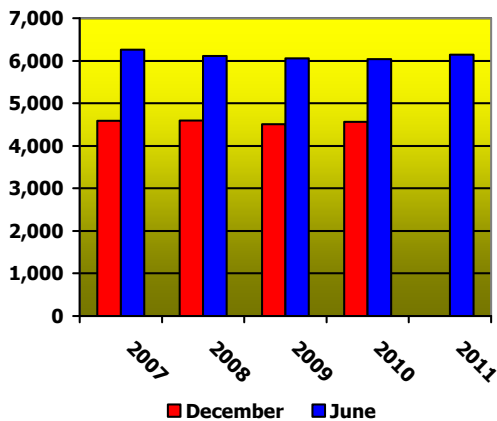
7. Employment in the Hospitality Sector

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 19 below shows the number of employees in the hospitality sector between 2007 and 2011. There was a small decrease in 2008 and further decreases in June 2009 and 2010. However, June 2011 saw a slight increase of 110 total staff.

Figure 19 Total staff employed in the hospitality sector 2007 – 2011



Source: States Statistics Unit

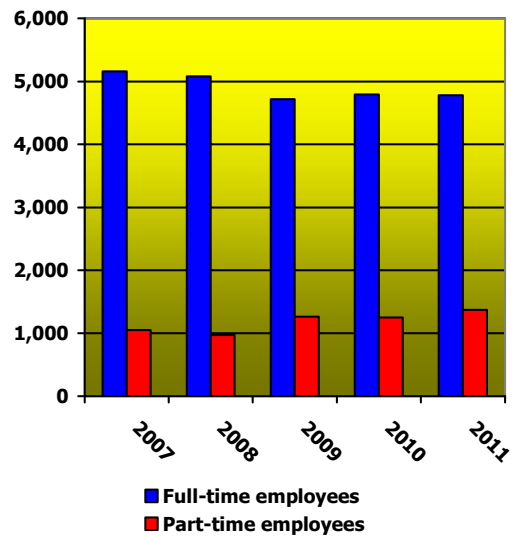
The difference between the number of staff employed in June 2011 and December 2010, some 1,590, would indicate the seasonal nature of tourism employment. The equivalent figure in 2010 was 1,530.

Measured against staff employed in all sectors, the percentage attributable to the hospitality sector in the June reports has fallen from 13% in 2007 to 12% in 2008, and has remained at 12% in every June report since then. There has been a steadying in the numbers of staff employed since numbers began to fall in the 1990's.

Figure 20 below shows the trends in full-time and part-time employment since 2007. In 2011, both full-time and part-time employment were at a very similar level to 2010.

In 2007, full-time employees accounted for 83% of all those employed in hotels, restaurants and bars, compared to 78% in 2011.

Figure 20 Full-time vs. part-time posts (June) 2007 – 2011



Source: States Statistics Unit

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

8. Passenger Arrivals

In 2011, passenger arrivals through Jersey's airport increased by 15,300 (2.1%) and passengers through Jersey harbour terminals increased by 15,200 (4.0%).

Figure 21 details a breakdown of arrivals by air and sea against the total for each year.

Figure 21 Total passenger arrivals 2007 – 2011

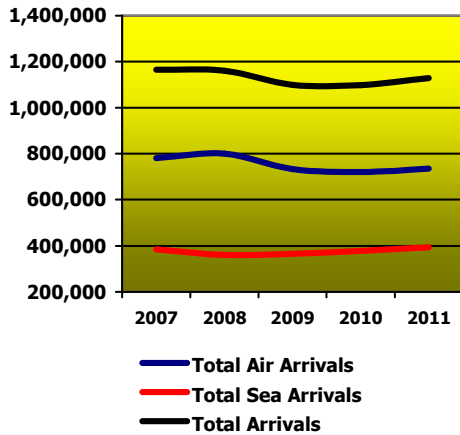
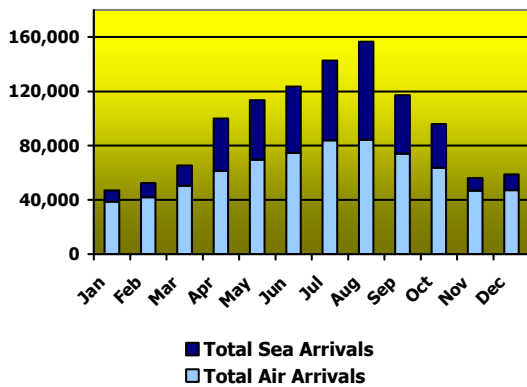


Figure 22 shows arrivals by month during 2011. The pattern of higher arrivals during the summer months reflects the seasonality of the "tourist" season.

Figure 22 Total air & sea arrivals by month for 2011

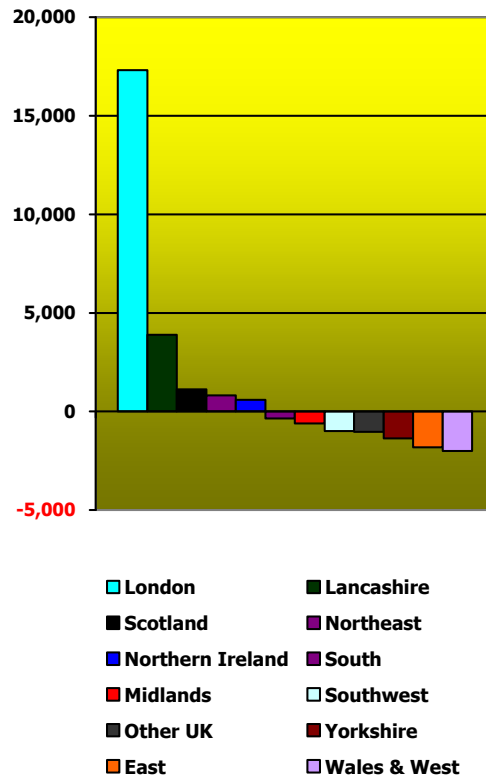


As in recent years, 2011 again saw some significant changes in arrivals patterns.

5 regions showed increases in passenger arrivals. The highest increase was in Greater London (+17,300), mainly due to an increase of 7% in passenger numbers on the Gatwick route. There was a decrease of 2,000 on the routes from Wales and the West, as well as a decrease of 1,800 from the East. The loss of the Plymouth route affected the Southwest figures (1,000 down on 2010).

Figure 23 illustrates the impact of operators in 2011 vs. 2010 by region.

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



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

9. Guide to Data Sources and Notes

Figures

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

Seasons

Where seasons are referred to, the following is applied:

Spring = April, May and June

Summer = July and August

Autumn = September and October

Winter = November, December, January, February and March

Passenger arrivals

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

Visitor volume, value and profiles

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

Visitor Registration Scheme

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

The Jersey Travel Surveys

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

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

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

Staying Leisure Visitor Surveys 2006 and 2008

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

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

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 2011 Annual Report.

Jersey Conference Bureau
www.jerseyconferences.co.uk

Jersey Met Office
www.jerseymet.gov.je

Jersey Harbours
www.jersey-harbours.com

Statistics Unit
www.gov.je/ChiefMinister/Statistics

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

Appendix 1

VISITOR VOLUMES 2007 - 2011

STAYING HOLIDAY/LEISURE VISITORS	2007					2008					2009					2010					2011					Change		Average		
																										11/10	'07-'11	11/10	'07-'11	
UK	295,040	282,810	255,990	247,340	239,480	282,810	255,990	247,340	239,480	239,480	282,810	255,990	247,340	239,480	239,480	282,810	255,990	247,340	239,480	239,480	239,480	282,810	255,990	247,340	239,480	239,480	-3.2%	264,130	4,770	4,770
IRELAND	4,160	5,760	4,380	4,380	4,000	5,760	4,380	4,380	4,000	4,000	5,760	4,380	4,380	4,000	4,000	5,760	4,380	4,380	4,000	4,000	4,000	5,760	4,380	4,380	4,000	4,000	-8.7%	16,780	16,780	16,780
OTHER CI	15,320	16,470	16,590	16,450	19,090	16,470	16,590	16,450	19,090	19,090	16,470	16,590	16,450	19,090	19,090	16,470	16,590	16,450	19,090	19,090	19,090	16,470	16,590	16,450	19,090	19,090	16.0%	35,410	35,410	35,410
FRANCE	33,400	32,070	34,260	36,750	40,580	32,070	34,260	36,750	40,580	40,580	32,070	34,260	36,750	40,580	40,580	32,070	34,260	36,750	40,580	40,580	40,580	32,070	34,260	36,750	40,580	40,580	10.4%	10,350	10,350	10,350
GERMANY	9,640	8,850	9,260	10,750	13,260	8,850	9,260	10,750	13,260	13,260	8,850	9,260	10,750	13,260	13,260	8,850	9,260	10,750	13,260	13,260	13,260	8,850	9,260	10,750	13,260	13,260	23.3%	600	600	600
NORWAY	460	810	420	590	740	810	420	590	740	740	810	420	590	740	740	810	420	590	740	740	740	810	420	590	740	740	25.4%	720	720	720
SWEDEN	1,140	930	570	460	510	930	570	460	510	510	930	570	460	510	510	930	570	460	510	510	510	930	570	460	510	510	10.9%	3,390	3,390	3,390
NETHERLANDS	3,940	2,960	3,150	3,570	3,340	2,960	3,150	3,570	3,340	3,340	2,960	3,150	3,570	3,340	3,340	2,960	3,150	3,570	3,340	3,340	3,340	2,960	3,150	3,570	3,340	3,340	-6.4%	1,680	1,680	1,680
BELGIUM	2,070	1,730	1,610	1,530	1,470	1,730	1,610	1,530	1,470	1,470	1,730	1,610	1,530	1,470	1,470	1,730	1,610	1,530	1,470	1,470	1,470	1,730	1,610	1,530	1,470	1,470	-3.9%	1,970	1,970	1,970
SWITZERLAND	1,900	1,810	2,000	1,910	2,250	1,810	2,000	1,910	2,250	2,250	1,810	2,000	1,910	2,250	2,250	1,810	2,000	1,910	2,250	2,250	2,250	1,810	2,000	1,910	2,250	2,250	17.8%	1,700	1,700	1,700
FINLAND	180	110	150	220	210	110	150	220	210	210	110	150	220	210	210	110	150	220	210	210	210	110	150	220	210	210	-4.5%	450	450	450
DENMARK	430	420	410	460	520	420	410	460	520	520	420	410	460	520	520	420	410	460	520	520	520	420	410	460	520	520	13.0%	690	690	690
AUSTRIA	950	580	630	420	880	580	630	420	880	880	580	630	420	880	880	580	630	420	880	880	880	580	630	420	880	880	109.5%	400	400	400
SPAIN	390	360	420	360	490	360	420	360	490	490	360	420	360	490	490	360	420	360	490	490	490	360	420	360	490	490	36.1%	250	250	250
PORTUGAL	230	250	380	220	160	250	380	220	160	160	250	380	220	160	160	250	380	220	160	160	160	250	380	220	160	160	-27.3%	340	340	340
ITALY	330	240	460	340	340	240	460	340	340	340	240	460	340	340	340	240	460	340	340	340	340	240	460	340	340	340	0.0%	650	650	650
CANADA	730	710	480	670	660	710	480	670	660	660	710	480	670	660	660	710	480	670	660	660	660	710	480	670	660	660	-1.5%	1,140	1,140	1,140
USA	1,130	880	1,110	1,350	1,230	880	1,110	1,350	1,230	1,230	880	1,110	1,350	1,230	1,230	880	1,110	1,350	1,230	1,230	1,230	880	1,110	1,350	1,230	1,230	-8.9%	1,100	1,100	1,100
AUSTRALIA	1,020	1,030	910	1,110	1,440	1,030	910	1,110	1,440	1,440	1,030	910	1,110	1,440	1,440	1,030	910	1,110	1,440	1,440	1,440	1,030	910	1,110	1,440	1,440	29.7%	29,100	29,100	29,100
OTHER	3,400	3,500	4,060	3,770	3,770	3,400	3,500	4,060	3,770	3,770	3,400	3,500	4,060	3,770	3,770	3,400	3,500	4,060	3,770	3,770	3,770	3,400	3,500	4,060	3,770	3,770	0.3%	3,700	3,700	3,700
TOTAL STAYING LEISURE ¹	375,860	362,280	338,430	332,640	334,420	362,280	338,430	332,640	334,420	334,420	362,280	338,430	332,640	334,420	334,420	362,280	338,430	332,640	334,420	334,420	362,280	338,430	332,640	334,420	334,420	0.5%	348,730	348,730	348,730	
VISITING FRIENDS/RELATIVES ²	81,710	95,470	101,010	98,610	101,470	95,470	101,010	98,610	101,470	101,470	95,470	101,010	98,610	101,470	101,470	95,470	101,010	98,610	101,470	101,470	101,470	95,470	101,010	98,610	101,470	101,470	2.9%	95,650	95,650	95,650
LANGUAGE STUDENTS ⁴	2,230	2,850	2,680	2,850	3,200	2,850	2,680	2,850	3,200	3,200	2,850	2,680	2,850	3,200	3,200	2,850	2,680	2,850	3,200	3,200	3,200	2,850	2,680	2,850	3,200	3,200	8.5%	2,780	2,780	2,780
BUSINESS VISITORS ⁴	104,010	105,430	88,910	95,850	98,170	105,430	88,910	95,850	98,170	98,170	105,430	88,910	95,850	98,170	98,170	105,430	88,910	95,850	98,170	98,170	98,170	105,430	88,910	95,850	98,170	98,170	2.4%	98,470	98,470	98,470
CONFERENCE DELEGATES ⁵	9,690	9,190	9,240	9,220	9,330	9,190	9,240	9,220	9,330	9,330	9,190	9,240	9,220	9,330	9,330	9,190	9,240	9,220	9,330	9,330	9,330	9,190	9,240	9,220	9,330	9,330	1.2%	9,330	9,330	9,330
VISITING YACHTSMEN ⁶	21,070	19,920	21,420	23,230	23,420	19,920	21,420	23,230	23,420	23,420	19,920	21,420	23,230	23,420	23,420	19,920	21,420	23,230	23,420	23,420	23,420	19,920	21,420	23,230	23,420	23,420	0.8%	21,810	21,810	21,810
LEISURE DAYTRIPPERS ⁷	94,050	96,730	98,360	99,870	100,440	96,730	98,360	99,870	100,440	100,440	96,730	98,360	99,870	100,440	100,440	96,730	98,360	99,870	100,440	100,440	100,440	96,730	98,360	99,870	100,440	100,440	0.6%	97,890	97,890	97,890
OTHER ⁸	50,660	34,520	20,740	20,360	19,230	34,520	20,740	20,360	19,230	19,230	34,520	20,740	20,360	19,230	19,230	34,520	20,740	20,360	19,230	19,230	19,230	34,520	20,740	20,360	19,230	19,230	-5.6%	29,100	29,100	29,100
TOTAL VISITORS	739,280	726,390	680,790	682,730	689,680	726,390	680,790	682,730	689,680	689,680	726,390	680,790	682,730	689,680	689,680	726,390	680,790	682,730	689,680	689,680	726,390	680,790	682,730	689,680	689,680	1.0%	703,770	703,770	703,770	

¹ Staying leisure visitors are based upon returns of visitor registration cards and the 2007 and 2009 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 and 2009 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 and 2009 Travel Surveys.

⁵ Conference figures are supplied by the Jersey Conference Bureau.

⁶ Visiting yacht figures are supplied by the Jersey Harbours.

⁷ Leisure day trips are estimated from the results of the 2007 and 2009 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 Travel Survey had a tighter definition of "Other" than previous surveys, with many respondents being reclassified as leisure or business visitors.

Appendix 2

BREAKDOWN OF ON-ISLAND VISITOR EXPENDITURE ESTIMATES BY SOURCE MARKET FOR 2010 AND 2011

	2010		2011		2011 vs. 2010	
	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	£476	£117,732	£510	£122,049	7%	4%
Ireland	£568	£2,485	£600	£2,397	6%	-4%
Other C.I.	£280	£4,600	£289	£5,521	3%	20%
France	£245	£8,985	£258	£10,486	5%	17%
Germany	£529	£5,686	£565	£7,486	7%	32%
Benelux	£455	£2,320	£478	£2,301	5%	-1%
Other	£490	£5,808	£553	£7,293	13%	26%
Staying Leisure Total¹	£444	£147,617	£471	£157,533	6%	7%
Visiting friends/relatives¹	£274	£27,033	£287	£29,113	5%	8%
Language students²	£908	£2,678	£847	£2,709	-7%	1%
Daytrippers - French	£50	£2,714	£52	£2,751	4%	1%
Daytrippers - UK	£43	£472	£44	£476	2%	1%
Daytrippers - Other C.I.	£98	£1,581	£102	£1,966	4%	24%
Daytrippers - Other	£39	£726	£41	£738	5%	2%
Daytrippers - Total¹	£55	£5,493	£59	£5,932	7%	8%
Visiting yachtsmen³	£90	£2,091	£97	£2,273	8%	9%
Business - Day visitors	£64	£1,927	£66	£2,123	3%	10%
Business - Staying visitors	£391	£25,664	£395	£26,050	1%	2%
Business visitors - Total¹	£288	£27,591	£287	£28,174	0%	2%
Conference - Association	£515	£1,966	£786	£2,553	53%	30%
Conference - Corporate	£675	£3,647	£515	£3,132	-24%	-14%
Conference delegates - Total⁴	£609	£5,613	£610	£5,685	0%	1%
Other - Day visitors	£77	£397	£80	£408	4%	3%
Other - Staying visitors	£676	£10,292	£716	£10,134	6%	-2%
Other visitors - Total¹	£525	£10,689	£548	£10,542	4%	-1%
Total Visitors	£335	£228,804	£351	£241,961	5%	6%

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

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

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

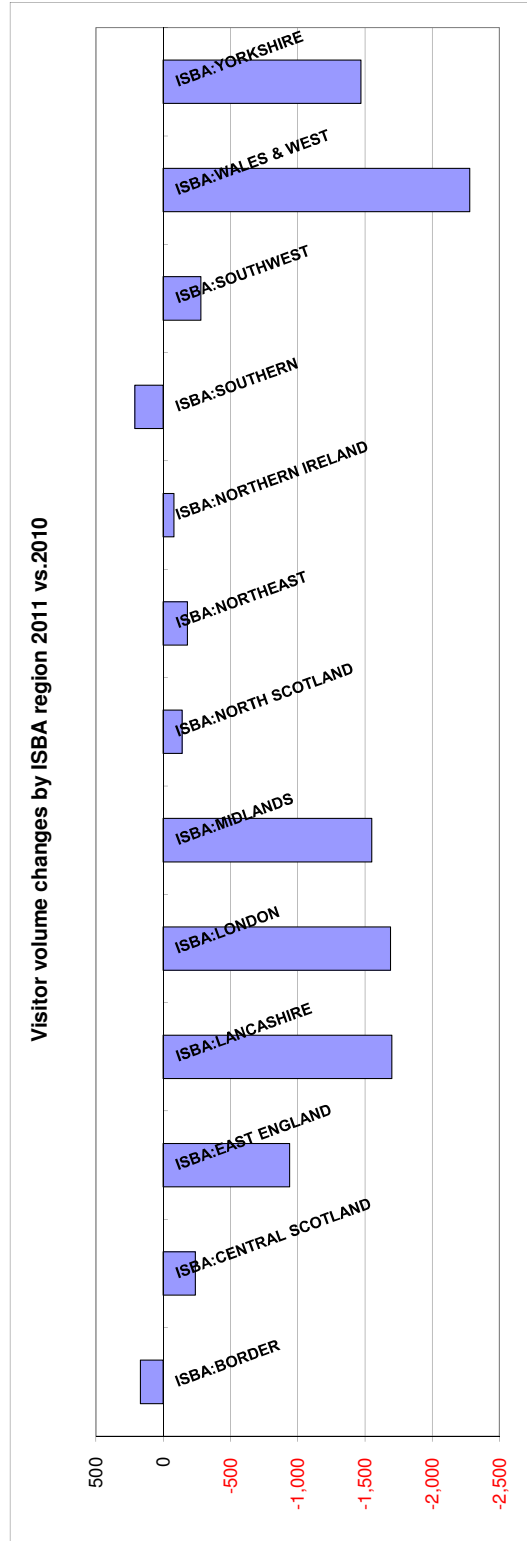
⁴ Expenditure is calculated by using results from the 2007 Jersey Travel Survey and research into conference delegate rates and applying RPI increases/decreases.

N.b. 2010 figures have not been related to 2011 prices.

Appendix 3 UK Staying Leisure Visitors by ISBA Region 2007 - 2011

REGION	UK Households		2007		2008		2009		2010		2011		2011		2011 Index
	Market Share	Share	Market	Share	Market	Share	Market	Share	Market	Share	Market	Share	% Change 11/10	Vol. Change 11/10	
ISBA: BORDER	1.2%	2,330	1%	3,390	1%	2,610	1%	2,430	1%	2,600	1%	2,600	7.0%	170	0.83
ISBA: CENTRAL SCOTLAND	6.3%	10,880	4%	17,820	4%	8,890	3%	10,080	4%	9,840	4%	9,840	-2.4%	-240	0.63
ISBA: EAST ENGLAND	6.7%	22,920	8%	18,950	8%	17,690	7%	17,180	7%	16,240	7%	16,240	-5.5%	-940	1.04
ISBA: LANCASHIRE	11.6%	25,080	9%	32,810	10%	26,290	10%	28,520	11%	26,820	11%	26,820	-6.0%	-1,700	0.95
ISBA: LONDON	19.4%	53,200	18%	54,870	18%	51,540	20%	48,070	19%	46,380	19%	46,380	-3.5%	-1,690	0.98
ISBA: MIDLANDS	15.4%	55,850	18%	43,550	18%	41,790	16%	39,480	16%	37,930	16%	37,930	-3.9%	-1,550	1.04
ISBA: NORTH SCOTLAND	2.1%	3,920	1%	5,940	2%	4,640	2%	5,090	2%	4,950	2%	4,950	-2.8%	-140	0.95
ISBA: NORTHEAST	5.1%	7,820	3%	14,420	3%	6,890	3%	8,150	3%	7,970	3%	7,970	-2.2%	-180	0.59
ISBA: NORTHERN IRELAND	2.4%	4,340	1%	6,790	1%	5,080	2%	4,960	2%	4,880	2%	4,880	-1.6%	-80	0.83
ISBA: SOUTHERN	9.2%	35,820	12%	26,020	12%	33,330	13%	31,900	13%	32,110	13%	32,110	0.7%	210	1.41
ISBA: SOUTHWEST	3.0%	12,300	4%	8,480	4%	10,020	4%	9,990	4%	9,710	4%	9,710	-2.8%	-280	1.33
ISBA: WALES & WEST	7.7%	28,970	10%	21,780	9%	23,210	9%	20,920	8%	18,640	8%	18,640	-10.9%	-2,280	1.04
ISBA: YORKSHIRE	9.9%	31,510	11%	28,000	10%	24,000	9%	22,880	9%	21,410	9%	21,410	-6.4%	-1,470	0.91
TOTAL		295,040		282,820		255,980		249,650		239,480		239,480	-4.1%	-10,170	

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



Appendix 4

French Staying Leisure Visitors by Region 2007-2011

	2007	% market share	2008	% market share	2009	% market share	2010	% market share	2011	% market share	Change 11/10	Average 2007-2011
BRITTANY	10,710	32%	11,280	35%	12,330	35%	13,800	37%	15,160	37%	10%	12,660
GREATER PARIS	6,350	19%	6,050	19%	6,850	19%	6,140	17%	7,140	18%	16%	6,510
NORMANDY	5,560	17%	4,780	15%	4,790	15%	5,690	15%	5,610	14%	-1%	5,290
LOIRE VALLEY	5,810	17%	5,480	17%	5,480	17%	6,090	17%	6,600	16%	8%	5,900
SOUTH EAST	940	3%	830	3%	890	3%	1,200	3%	1,340	3%	12%	1,040
SOUTH WEST	910	3%	800	3%	860	3%	920	2%	1,110	3%	21%	920
MEDITERRANEAN	650	2%	640	2%	690	2%	610	2%	930	2%	52%	700
POITOU-CHARENTES	660	2%	550	2%	580	2%	590	2%	690	2%	17%	610
NORTH EAST	470	1%	450	1%	480	1%	520	1%	610	2%	17%	510
NORTH	490	1%	380	1%	410	1%	560	2%	520	1%	-7%	480
PICARDY	380	1%	480	2%	520	2%	320	1%	420	1%	31%	420
BURGUNDY	240	1%	190	1%	210	1%	210	1%	220	1%	5%	210
CHAMPAGNE	230	1%	160	1%	170	1%	260	1%	230	1%	-12%	210
TOTAL	33,400		32,070		34,260		36,910		40,560		10%	35,440

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 - 2011

Type	Group	% Households	Type Description	% Households	2008	2009	2010	2011	Index 2011
1	Alpha Territory	3.5%	Global Power Brokers	0.3%	0.4%	0.4%	0.4%	0.4%	1.23
2			Voices of Authority	1.2%	1.7%	1.8%	1.8%	1.8%	1.53
3			Business Class	1.5%	2.9%	3.3%	3.3%	3.4%	2.24
4			Serious Money	0.6%	1.3%	1.4%	1.4%	1.5%	2.63
5	Professional Rewards	8.2%	Mid-Career Climbers	2.3%	3.9%	4.0%	4.0%	4.0%	1.72
6			Yesterday's Captains	1.8%	4.2%	4.3%	4.5%	4.3%	2.34
7			Distinctive Success	0.5%	1.5%	1.6%	1.5%	1.6%	3.23
8			Dormitory Villagers	1.3%	2.9%	3.3%	3.3%	3.3%	2.53
9			Escape to the Country	1.3%	2.3%	2.4%	2.4%	2.6%	1.97
10			Parish Guardians	1.0%	1.9%	2.0%	2.0%	2.1%	2.14
11	Rural Solitude	4.4%	Squires Among Locals	0.9%	1.9%	2.1%	2.0%	2.0%	2.38
12			Country Loving Elders	1.3%	1.7%	1.6%	1.6%	1.8%	1.36
13			Modern Agribusiness	1.4%	1.6%	1.7%	1.6%	1.7%	1.23
14			Farming Today	0.5%	0.8%	0.9%	0.9%	1.0%	1.79
15			Upland Struggle	0.3%	0.4%	0.4%	0.4%	0.5%	1.35
16	Small Town Diversity	8.8%	Side Street Singles	1.2%	1.1%	1.1%	1.1%	1.2%	0.99
17			Jack of All Trades	2.0%	2.8%	2.5%	2.6%	2.5%	1.24
18			Hardworking Families	2.6%	3.4%	3.4%	3.5%	3.3%	1.24
19			Innate Conservatives	3.0%	4.6%	4.5%	4.6%	4.5%	1.50
20	Active Retirement	4.4%	Golden Retirement	0.7%	1.1%	1.2%	1.2%	1.1%	1.71
21			Bungalow Quietude	1.8%	2.4%	2.3%	2.3%	2.2%	1.21
22			Beachcombers	0.6%	0.8%	1.0%	0.9%	0.9%	1.52
23			Balcony Downsize	1.3%	1.0%	1.1%	1.2%	1.1%	0.88
24	Suburban Mindsets	11.2%	Garden Suburbia	2.1%	3.7%	3.9%	3.7%	3.9%	1.82
25			Production Managers	2.6%	4.1%	3.9%	4.1%	3.9%	1.50
26			Mid-Market Families	2.7%	2.9%	2.7%	2.6%	2.7%	0.98
27			Shop Floor Affluence	2.7%	2.5%	2.4%	2.4%	2.5%	0.90
28			Asian Attainment	1.0%	0.5%	0.4%	0.4%	0.4%	0.45
29	Careers and Kids	5.8%	Footloose Managers	1.7%	2.4%	2.5%	2.4%	2.5%	1.50
30			Soccer Dads and Mums	1.3%	1.4%	1.4%	1.5%	1.5%	1.08
31			Domestic Comfort	1.1%	2.4%	2.5%	2.4%	2.3%	2.10
32			Childcare Years	1.5%	1.4%	1.5%	1.4%	1.4%	0.93
33			Military Dependents	0.2%	0.1%	0.1%	0.1%	0.1%	0.74
34	New Homemakers	5.9%	Buy-to-Let Territory	1.8%	0.7%	0.7%	0.7%	0.6%	0.34
35			Brownfield Pioneers	1.4%	0.6%	0.6%	0.7%	0.6%	0.45
36			Foot on the Ladder	2.4%	1.8%	1.6%	1.5%	1.7%	0.73
37			First to Move In	0.4%	0.1%	0.2%	0.3%	0.4%	1.12
38	Ex-Council Community	8.7%	Settled Ex-Tenants	2.1%	1.2%	1.1%	1.1%	1.1%	0.52
39			Choice Right to Buy	1.7%	1.7%	1.5%	1.6%	1.5%	0.86
40			Legacy of Labour	2.7%	1.3%	1.1%	1.1%	1.1%	0.40
41			Stressed Borrowers	2.2%	1.5%	1.4%	1.4%	1.3%	0.61
42	Claimant Cultures	5.2%	Worn-Out Workers	2.3%	1.0%	0.7%	0.8%	0.7%	0.32
43			Streetwise Kids	1.1%	0.4%	0.4%	0.4%	0.3%	0.33
44			New Parents in Need	1.8%	0.4%	0.4%	0.3%	0.3%	0.19
45	Upper Floor Living	5.2%	Small Block Singles	1.8%	0.3%	0.3%	0.3%	0.3%	0.18
46			Tenement Living	0.8%	0.3%	0.3%	0.2%	0.3%	0.36
47			Deprived View	0.5%	0.1%	0.1%	0.1%	0.1%	0.15
48			Multicultural Towers	1.1%	0.3%	0.3%	0.4%	0.3%	0.30
49	Elderly Needs	6.0%	Re-Housed Migrants	1.0%	0.3%	0.3%	0.3%	0.3%	0.33
50			Pensioners in Blocks	1.3%	0.4%	0.4%	0.4%	0.4%	0.33
51			Sheltered Seniors	1.1%	0.6%	0.4%	0.5%	0.4%	0.38
52			Meals on Wheels	0.9%	0.5%	0.5%	0.5%	0.5%	0.56
53	Industrial Heritage	7.4%	Low Spending Elders	2.7%	1.5%	1.4%	1.4%	1.4%	0.51
54			Clocking Off	2.3%	2.9%	2.8%	2.8%	2.7%	1.20
55			Backyard Regeneration	2.1%	2.4%	2.2%	2.4%	2.3%	1.11
56	Terrace Melting Pot	7.0%	Small Wage Owners	3.1%	2.4%	2.2%	2.2%	2.2%	0.70
57			Back-to-Back Basics	2.0%	1.0%	0.9%	0.8%	0.9%	0.46
58			Asian Identifiers	0.9%	0.1%	0.1%	0.1%	0.2%	0.17
59	Liberal Opinions	8.5%	Low-Key Starters	2.7%	1.3%	1.2%	1.1%	1.0%	0.38
60			Global Fusion	1.4%	0.7%	0.7%	0.7%	0.7%	0.49
61			Convivial Homeowners	1.7%	1.7%	1.7%	1.7%	1.7%	1.00
62	Liberal Opinions	8.5%	Crash Pad Professionals	1.1%	1.2%	1.3%	1.3%	1.2%	1.13
63			Urban Cool	1.1%	1.2%	1.3%	1.3%	1.3%	1.22
64			Bright Young Things	1.5%	1.0%	1.2%	1.1%	1.1%	0.75
65			Anti-Materialists	1.0%	0.5%	0.4%	0.5%	0.5%	0.50
66			University Fringe	0.9%	0.5%	0.6%	0.6%	0.6%	0.60
67			Study Buddies	1.1%	0.2%	0.1%	0.2%	0.2%	0.15

MOSAIC is a geodemographic profiling system based upon UK postcodes.

This table shows the geo-demographic profile of visitors to Jersey between 2008 and 2011. 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 2007 - 2011

COUNTRY	Stay																				Average Stay				
	1 - 3 Nights					4 - 6 Nights					7 Nights					8+ Nights					Nights				
	2007	2008	2009	2010	2011	2007	2008	2009	2010	2011	2007	2008	2009	2010	2011	2007	2008	2009	2010	2011	2007	2008	2009	2010	2011
UK	36%	38%	39%	41%	40%	26%	25%	25%	26%	28%	30%	29%	28%	26%	26%	8%	7%	8%	7%	7%	4.9	4.8	4.8	4.7	4.8
IRELAND	30%	35%	34%	38%	34%	26%	31%	27%	27%	28%	37%	29%	31%	26%	30%	7%	6%	8%	9%	7%	5.2	4.8	5.0	5.0	5.0
OTHER CI	92%	93%	91%	93%	93%	7%	6%	7%	6%	5%	2%	1%	2%	1%	1%	0%	1%	0%	0%	0%	1.9	1.9	2.0	1.9	1.9
FRANCE	89%	88%	89%	89%	88%	8%	8%	8%	9%	9%	2%	2%	2%	2%	2%	1%	2%	1%	1%	1%	2.1	2.1	2.1	2.1	2.1
GERMANY	21%	24%	25%	26%	23%	27%	28%	26%	24%	31%	35%	32%	33%	37%	34%	17%	15%	15%	14%	13%	6.1	5.9	5.9	5.9	5.9
NORWAY	34%	45%	32%	47%	57%	44%	34%	35%	20%	25%	10%	7%	20%	21%	8%	12%	14%	13%	11%	10%	4.7	4.6	5.1	4.7	4.5
SWEDEN	25%	25%	25%	41%	30%	62%	64%	58%	32%	30%	9%	8%	8%	11%	12%	4%	4%	8%	16%	28%	4.1	4.0	4.3	4.8	6.7
HOLLAND	34%	36%	37%	41%	41%	28%	29%	23%	26%	23%	29%	26%	26%	24%	28%	10%	9%	15%	9%	7%	5.1	4.9	5.1	4.9	4.9
BELGIUM	57%	53%	52%	52%	54%	27%	31%	32%	32%	32%	10%	11%	10%	11%	10%	6%	5%	6%	5%	4%	3.7	3.7	3.7	3.7	3.7
SWITZERLAND	41%	44%	44%	40%	36%	23%	27%	32%	30%	35%	26%	18%	13%	20%	19%	9%	11%	11%	10%	9%	4.8	4.7	4.4	4.9	4.9
FINLAND	47%	38%	40%	44%	60%	27%	44%	44%	42%	20%	9%	8%	7%	8%	10%	16%	9%	9%	5%	10%	4.5	4.4	4.1	3.8	4.2
DENMARK	45%	55%	57%	61%	65%	16%	35%	16%	17%	17%	31%	6%	19%	10%	12%	8%	4%	7%	12%	6%	4.7	3.8	4.0	4.0	3.7
AUSTRIA	45%	50%	54%	42%	50%	32%	20%	21%	20%	15%	17%	20%	16%	29%	29%	7%	10%	9%	10%	6%	4.5	4.6	4.2	4.9	4.7
SPAIN	60%	45%	48%	61%	63%	25%	36%	24%	23%	20%	5%	10%	6%	8%	8%	10%	9%	21%	8%	9%	4.0	4.3	5.2	3.9	4.0
PORTUGAL	57%	47%	45%	65%	49%	13%	25%	30%	19%	29%	16%	14%	7%	9%	8%	14%	15%	18%	6%	14%	4.4	4.7	4.9	3.6	5.0
ITALY	48%	46%	39%	64%	64%	32%	40%	54%	21%	19%	9%	6%	3%	8%	7%	11%	8%	4%	7%	10%	4.2	4.3	4.2	3.5	4.0
CANADA	46%	45%	47%	50%	47%	27%	30%	29%	30%	24%	10%	10%	7%	9%	9%	17%	14%	17%	11%	21%	5.1	4.8	5.0	4.4	4.7
USA	60%	53%	68%	71%	63%	28%	35%	23%	21%	25%	7%	6%	4%	4%	6%	5%	7%	5%	4%	6%	3.5	3.9	3.3	3.1	3.7
AUSTRALIA	61%	56%	59%	56%	58%	26%	26%	26%	29%	29%	8%	7%	7%	9%	8%	5%	11%	9%	6%	5%	3.6	4.1	3.8	4.0	3.8
OTHER	56%	58%	65%	62%	58%	24%	23%	21%	21%	24%	10%	7%	7%	11%	10%	10%	12%	7%	6%	8%	4.1	4.1	3.5	3.7	4.0
TOTAL	45%	45%	47%	48%	48%	23%	23%	23%	23%	24%	26%	25%	23%	22%	22%	7%	7%	7%	6%	6%	4.6	4.4	4.4	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 2007 - 2011

COUNTRY	% Tour Operator					% First Time Visitors					When booked					Travel By Air														
						< 1 month					1 - 3 months					> 3 months														
	2007	2008	2009	2010	2011	2007	2008	2009	2010	2011	2007	2008	2009	2010	2011	2007	2008	2009	2010	2011	2007	2008	2009	2010	2011					
UK	51%	53%	52%	49%	55%	40%	43%	44%	47%	44%	31%	28%	29%	29%	29%	34%	37%	38%	37%	35%	34%	36%	32%	34%	36%	82%	82%	81%	81%	78%
IRELAND	40%	43%	41%	38%	45%	40%	46%	51%	50%	49%	35%	33%	33%	40%	36%	30%	39%	38%	34%	33%	35%	28%	29%	27%	30%	96%	97%	94%	94%	95%
OTHER CI	56%	50%	49%	42%	45%	8%	8%	10%	13%	11%	67%	62%	59%	60%	59%	23%	30%	32%	29%	29%	9%	9%	9%	11%	12%	50%	50%	51%	52%	45%
FRANCE	64%	61%	62%	61%	65%	66%	66%	60%	61%	61%	62%	61%	62%	60%	60%	28%	31%	31%	32%	32%	9%	8%	7%	8%	8%	5%	5%	10%	8%	6%
GERMANY	63%	62%	62%	65%	68%	84%	83%	78%	79%	78%	27%	23%	25%	22%	19%	33%	34%	36%	33%	34%	40%	42%	39%	45%	47%	52%	53%	58%	65%	65%
NORWAY	63%	38%	33%	35%	51%	66%	63%	63%	62%	39%	28%	26%	28%	31%	41%	40%	25%	37%	44%	40%	32%	49%	35%	25%	20%	49%	72%	75%	66%	71%
SWEDEN	67%	66%	66%	49%	58%	76%	70%	66%	57%	72%	61%	52%	31%	36%	29%	18%	21%	41%	42%	36%	20%	27%	28%	22%	35%	53%	34%	49%	65%	67%
HOLLAND	58%	56%	56%	55%	57%	83%	80%	74%	78%	80%	29%	32%	34%	35%	31%	40%	38%	35%	40%	40%	32%	30%	30%	25%	29%	51%	48%	51%	51%	53%
BELGIUM	50%	49%	50%	58%	60%	78%	78%	72%	72%	77%	49%	43%	42%	45%	39%	29%	36%	34%	32%	34%	21%	21%	24%	22%	27%	24%	28%	34%	35%	21%
SWITZERLAND	56%	55%	55%	59%	65%	72%	70%	63%	74%	63%	45%	41%	35%	39%	28%	34%	39%	43%	36%	41%	21%	21%	28%	25%	31%	73%	75%	79%	78%	77%
FINLAND	39%	58%	56%	55%	71%	75%	71%	76%	74%	61%	38%	58%	39%	64%	24%	48%	28%	41%	22%	59%	14%	14%	20%	14%	18%	81%	73%	70%	56%	62%
DENMARK	48%	42%	40%	32%	39%	68%	83%	62%	55%	64%	53%	42%	45%	37%	43%	25%	37%	32%	34%	31%	23%	21%	22%	29%	26%	75%	40%	57%	60%	51%
AUSTRIA	60%	56%	55%	47%	67%	81%	83%	73%	75%	68%	26%	23%	32%	23%	29%	46%	36%	38%	31%	46%	28%	41%	30%	46%	26%	64%	57%	68%	67%	60%
SPAIN	43%	35%	36%	39%	51%	47%	40%	51%	50%	51%	60%	48%	61%	59%	58%	25%	37%	21%	22%	24%	15%	14%	18%	19%	18%	73%	76%	77%	67%	55%
PORTUGAL	25%	30%	28%	25%	24%	46%	59%	45%	57%	42%	66%	76%	50%	64%	69%	19%	21%	42%	25%	21%	15%	3%	9%	11%	10%	88%	75%	90%	76%	92%
ITALY	43%	34%	33%	24%	32%	66%	76%	79%	67%	69%	46%	62%	61%	59%	56%	44%	27%	28%	28%	25%	9%	11%	11%	13%	19%	61%	57%	72%	49%	56%
CANADA	55%	48%	48%	44%	58%	69%	70%	59%	64%	66%	41%	37%	35%	34%	27%	29%	35%	42%	39%	41%	30%	29%	22%	27%	32%	77%	70%	83%	70%	75%
USA	42%	42%	41%	38%	40%	63%	73%	53%	66%	65%	46%	43%	45%	43%	41%	34%	35%	40%	40%	35%	21%	22%	15%	17%	24%	82%	82%	82%	78%	72%
AUSTRALIA	39%	45%	41%	37%	46%	55%	65%	57%	60%	67%	54%	42%	44%	38%	37%	23%	30%	34%	30%	33%	23%	28%	23%	31%	30%	66%	71%	71%	67%	67%
OTHER	38%	49%	47%	37%	41%	63%	64%	62%	56%	63%	62%	48%	46%	47%	44%	23%	34%	39%	34%	32%	15%	17%	15%	19%	24%	75%	77%	88%	82%	78%
TOTAL	53%	53%	52%	49%	55%	44%	46%	45%	49%	47%	36%	33%	35%	36%	34%	33%	36%	37%	34%	34%	31%	32%	28%	30%	32%	73%	72%	72%	71%	67%

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 2007 - 2011

COUNTRY	Age Groups (Years)												Average Adult Age																	
	16-24			25-34			35-44			45-54			55-64			65-74			75+			Years								
	2007	2008	2009	2007	2008	2009	2007	2008	2009	2007	2008	2009	2007	2008	2009	2007	2008	2009	2007	2008	2009	2007	2008	2009	2007	2008	2009	2010	2011	
UK	3%	3%	3%	8%	8%	9%	15%	14%	14%	21%	21%	20%	20%	20%	20%	24%	24%	24%	23%	23%	23%	24%	24%	24%	11%	11%	11%	12%	13%	
IRELAND	6%	4%	5%	17%	19%	18%	18%	19%	20%	21%	23%	18%	21%	23%	21%	20%	20%	21%	21%	21%	21%	23%	23%	21%	5%	4%	5%	6%	6%	
OTHER CI	17%	19%	18%	23%	22%	22%	21%	20%	20%	18%	18%	19%	18%	18%	18%	13%	12%	11%	13%	13%	13%	6%	6%	7%	2%	2%	2%	2%	2%	
FRANCE	6%	6%	7%	15%	16%	17%	22%	21%	22%	26%	25%	24%	26%	26%	26%	20%	20%	20%	20%	20%	20%	8%	8%	9%	3%	3%	3%	3%	3%	
GERMANY	2%	2%	2%	6%	8%	7%	6%	19%	18%	13%	25%	24%	24%	24%	27%	25%	21%	21%	24%	23%	23%	21%	21%	21%	5%	6%	7%	8%	5%	
NORWAY	5%	2%	3%	3%	5%	6%	9%	13%	15%	19%	21%	23%	26%	23%	27%	17%	32%	31%	20%	17%	17%	19%	17%	18%	3%	2%	3%	4%	5%	
SWEDEN	3%	2%	2%	9%	7%	7%	9%	12%	10%	14%	10%	28%	19%	29%	31%	22%	35%	36%	34%	31%	31%	12%	12%	12%	5%	5%	5%	1%	3%	
HOLLAND	2%	2%	2%	8%	9%	10%	8%	19%	18%	15%	14%	32%	27%	28%	29%	29%	24%	26%	32%	24%	24%	10%	12%	11%	6%	4%	5%	4%	5%	
BELGIUM	5%	4%	4%	9%	12%	10%	20%	18%	18%	19%	13%	29%	35%	33%	31%	32%	21%	19%	20%	26%	24%	12%	9%	10%	4%	4%	5%	4%	5%	
SWITZERLAND	3%	6%	5%	14%	13%	12%	11%	10%	11%	10%	16%	21%	23%	23%	22%	28%	20%	21%	20%	23%	23%	11%	10%	11%	4%	6%	5%	7%	5%	4%
FINLAND	3%	3%	3%	9%	9%	9%	18%	7%	33%	20%	33%	31%	45%	35%	37%	25%	28%	15%	17%	4%	8%	11%	8%	10%	0%	0%	0%	0%	0%	0%
DENMARK	5%	4%	5%	2%	6%	5%	8%	8%	8%	11%	15%	14%	39%	31%	29%	17%	24%	29%	32%	29%	32%	14%	12%	12%	7%	6%	6%	5%	2%	5%
AUSTRIA	3%	3%	2%	4%	7%	8%	8%	19%	13%	15%	13%	24%	25%	32%	25%	34%	26%	19%	18%	21%	19%	20%	26%	20%	4%	7%	5%	4%	6%	5%
SPAIN	7%	11%	9%	3%	17%	19%	8%	15%	26%	16%	17%	15%	19%	15%	16%	29%	17%	15%	16%	20%	13%	12%	15%	15%	7%	5%	5%	4%	4%	4%
PORTUGAL	10%	17%	15%	7%	38%	33%	29%	29%	21%	25%	21%	13%	18%	27%	25%	11%	9%	10%	9%	11%	11%	7%	1%	5%	0%	2%	0%	2%	3%	4%
ITALY	10%	10%	9%	9%	18%	17%	17%	17%	24%	38%	32%	17%	22%	17%	15%	20%	18%	14%	14%	20%	26%	12%	6%	6%	1%	0%	1%	4%	0%	4%
CANADA	5%	5%	4%	3%	6%	5%	8%	6%	8%	10%	9%	6%	7%	13%	14%	19%	17%	24%	27%	24%	25%	22%	25%	24%	26%	14%	15%	16%	22%	22%
USA	0%	0%	3%	4%	5%	10%	7%	12%	17%	14%	10%	15%	16%	18%	22%	17%	32%	23%	22%	25%	25%	21%	21%	20%	11%	10%	10%	8%	8%	5%
AUSTRALIA	4%	4%	4%	2%	10%	12%	11%	9%	9%	10%	10%	8%	17%	18%	20%	15%	38%	28%	28%	30%	30%	18%	22%	21%	5%	7%	6%	6%	8%	5%
OTHER	13%	16%	15%	8%	25%	23%	22%	21%	16%	17%	17%	19%	17%	15%	13%	19%	14%	16%	17%	19%	15%	10%	11%	12%	4%	3%	4%	2%	4%	4%
TOTAL	4%	4%	5%	4%	9%	10%	10%	9%	16%	15%	15%	14%	14%	21%	21%	21%	23%	23%	23%	22%	17%	17%	17%	10%	9%	9%	10%	10%	10%	

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 2007 – 2011

	<u>2007</u>	<u>2008</u>	<u>2009</u>	<u>2010</u>	<u>2011</u>
Hotels	81	76	71	70	68
Guest Houses	49	42	43	42	44
Holiday Villages	0	0	0	0	0
Self-Catering	24	22	24	24	25
Campsites	4	4	4	4	4
Youth Hostel	1	1	0	1	2
Total	159	145	142	141	143

Accommodation Bed Spaces by Category 2007 – 2011

	<u>2007</u>	<u>2008</u>	<u>2009</u>	<u>2010</u>	<u>2011</u>
Hotels	9,840	9,746	9,045	9,199	9,189
Guest Houses	1,110	977	982	984	1,055
Holiday Villages	0	0	0	0	0
Self-Catering	736	674	760	922	870
Campsites	1,250	1,250	1,250	758	762
Youth Hostel	114	114	0	24	80
Total	13,050	12,771	12,037	11,887	11,956

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 2010 and 2011

	2010	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Year
Bed nights available	159,210	155,479	132,984	174,131	246,007	277,418	277,350	280,612	280,612	271,078	226,414	172,319	146,879	2,622,805
Bed nights sold	25,376	41,191	9,900	71,979	119,467	200,724	236,879	280,207	298,147	235,301	119,363	50,206	49,538	1,728,378
Total bed occupancy	16%	26%	33%	39%	57%	67%	78%	83%	68%	43%	25%	28%	53%	53%
Hotel bed nights available	137,001	132,984	174,131	246,007	277,418	277,350	280,612	280,612	280,612	271,078	226,414	172,319	146,879	2,622,805
Guest House bed nights available	9,555	9,900	17,509	24,620	27,027	27,360	27,745	28,334	28,334	27,420	22,296	11,981	9,689	243,436
Serviced bed nights available	148,556	142,884	191,640	270,627	304,445	304,710	308,357	308,946	308,946	298,498	248,710	184,300	156,568	2,866,241
Unserviced bed nights available	12,654	12,595	26,025	34,438	46,325	49,920	51,894	51,894	51,894	45,551	27,488	18,651	21,768	399,203
Bed nights sold in serviced accommodation	23,348	37,055	66,900	109,289	170,054	202,657	242,173	256,008	256,008	203,401	105,819	46,251	44,515	1,507,470
Total bed occupancy in serviced	16%	26%	35%	40%	56%	67%	79%	83%	68%	43%	25%	28%	53%	53%
Hotel bed nights sold	22,058	35,345	63,395	103,275	158,419	188,629	224,367	236,885	190,137	98,852	43,877	42,841	1,408,080	1,408,080
Guest House bed nights sold	1,290	1,710	3,505	6,014	11,635	14,028	17,806	19,123	13,264	6,967	2,374	1,674	1,674	99,390
Hotel bed space occupancy	16%	27%	36%	42%	57%	68%	80%	84%	70%	44%	25%	29%	29%	54%
Guest House bed space occupancy	14%	17%	20%	24%	43%	51%	64%	67%	48%	31%	20%	20%	17%	41%
Other bed nights sold	2,028	4,136	5,079	10,178	30,670	34,222	38,034	42,139	31,900	13,544	3,955	5,023	5,023	220,908
Other bed space occupancy	16%	33%	20%	30%	66%	69%	73%	81%	70%	49%	21%	23%	23%	55%
2011														
Bed nights available	162,612	170,266	140,119	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	25,337	45,086	70,764	122,777	204,170	247,251	289,348	289,348	298,041	237,482	120,200	53,131	54,085	1,767,672
Total bed occupancy	16%	26%	35%	43%	58%	71%	79%	79%	82%	69%	43%	24%	29%	54%
Hotel bed nights available	132,804	140,119	166,092	227,354	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	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	296,060	247,112	193,834	161,758	2,243,187
Unserviced bed nights available	19,242	18,144	20,352	38,112	48,189	52,123	55,781	55,846	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	251,334	203,186	104,309	48,127	46,886	1,317,154
Total bed occupancy in serviced	16%	27%	36%	44%	56%	70%	80%	81%	81%	69%	42%	25%	29%	59%
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	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	2,342	103,573
Hotel bed space occupancy	16%	27%	37%	45%	58%	71%	82%	83%	70%	43%	25%	30%	30%	54%
Guest House bed space occupancy	11%	21%	22%	29%	42%	50%	66%	65%	51%	31%	21%	21%	20%	42%
Other bed nights sold	2,627	4,420	5,235	14,083	33,747	39,421	42,566	46,707	34,296	15,891	5,004	7,199	7,199	251,196
Other bed space occupancy	14%	24%	26%	37%	70%	76%	76%	84%	70%	47%	21%	21%	30%	57%

Appendix 11

Room space occupancy 2010 and 2011

	2010	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Year
Room nights available	74,474	74,566	101,285	138,465	160,859	156,450	158,302	158,302	158,524	153,404	128,355	96,089	83,007	1,483,852
Room nights sold	19,493	28,932	45,398	61,096	94,462	118,261	132,672	132,672	143,797	124,315	69,756	34,014	29,953	902,149
Room night occupancy	26%	39%	45%	44%	59%	76%	84%	84%	91%	81%	54%	35%	36%	61%
Hotel room nights available	66,149	63,956	84,980	119,577	139,114	135,060	136,524	136,524	136,524	131,844	110,122	84,577	71,877	1,280,304
Guest House room nights available	4,750	4,886	8,591	11,106	13,702	13,470	13,315	13,315	13,609	13,400	11,001	5,735	4,835	118,400
Serviced room nights available	70,899	68,842	93,571	130,683	152,816	148,530	149,839	149,839	150,133	145,244	121,123	90,312	76,712	1,398,704
Other room nights available	3,575	5,724	7,714	7,782	8,043	7,920	8,463	8,463	8,463	8,160	7,232	5,777	6,295	85,148
Room nights sold in serviced accom	17,610	25,545	41,266	56,869	88,623	111,416	125,291	125,291	135,747	117,370	64,674	31,097	26,917	842,425
Total room occupancy in serviced	25%	37%	44%	44%	58%	75%	84%	84%	90%	81%	53%	34%	35%	60%
Hotel room nights sold	16,539	24,023	38,379	52,785	82,138	103,231	114,977	114,977	125,316	109,680	59,918	29,545	25,557	782,088
Guest House room nights sold	1,104	1,522	2,887	4,084	6,485	8,185	10,314	10,314	10,431	7,690	4,756	1,552	1,360	60,370
Hotel room occupancy	25%	38%	45%	44%	59%	76%	84%	84%	92%	83%	54%	35%	36%	61%
Guest House room occupancy	23%	31%	34%	37%	47%	61%	77%	77%	77%	57%	43%	27%	28%	51%
Other room nights sold	1,850	3,387	4,132	4,227	5,839	6,845	7,381	7,381	8,050	6,945	5,082	2,917	3,036	59,691
Other room occupancy	52%	59%	54%	54%	73%	86%	87%	87%	95%	85%	70%	50%	48%	70%
2011														
Room nights available	76,765	80,219	97,121	131,195	155,875	154,942	160,555	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	137,642	142,030	123,893	71,810	35,704	32,157	928,287
Room night occupancy	26%	40%	49%	52%	61%	79%	86%	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	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	14,198	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	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	9,802	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	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%	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	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	10,751	10,321	8,057	4,101	1,535	1,500	62,554
Hotel room occupancy	26%	39%	50%	51%	61%	80%	87%	87%	90%	83%	56%	34%	35%	63%
Guest House room occupancy	21%	34%	35%	41%	49%	63%	76%	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	8,660	9,011	7,190	5,730	4,349	4,803	69,433
Other room occupancy	36%	61%	66%	78%	85%	84%	88%	88%	93%	79%	65%	61%	65%	73%

Appendix 12

Jersey Link - Jersey Tourism Central Reservations 2007-2011

	Bookings	Bednights	Revenue	Value per Bednight	
2007	January	420	3,392	£112,960	£33.30
	February	490	4,291	£144,525	£33.68
	March	596	4,718	£169,210	£35.86
	April	594	4,233	£150,781	£35.62
	May	775	5,428	£200,064	£36.86
	June	721	4,923	£194,736	£39.56
	July	710	5,104	£210,947	£41.33
	August	681	4,539	£177,337	£39.07
	September	499	2,806	£98,957	£35.27
	October	285	1,769	£49,130	£27.77
	November	165	957	£30,162	£31.52
	December	81	575	£16,845	£29.30
Total	6,017	42,735	£1,555,654	£36.40	
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	
2011 vs. 2010	-4%	0%	5%	5%	

VSC = Visitor Services Centre, Jersey Tourism
 Web = Jersey Tourism Website - www.jersey.com

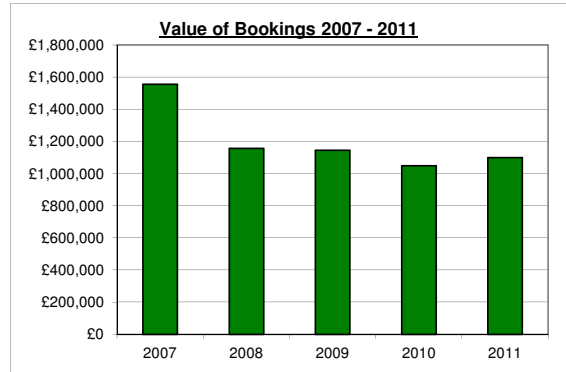
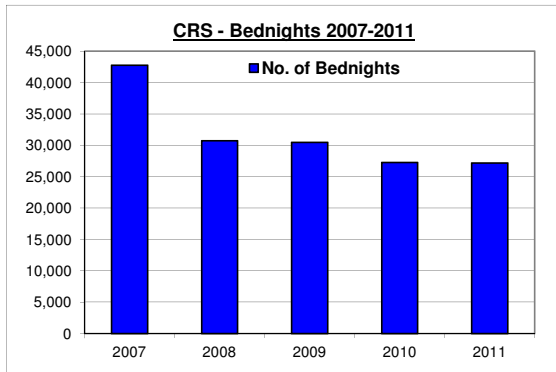
N.B. This data is collated based on monthly reports. Any booking modifications made after the release of these figures will have slightly altered the actual achieved data that is reported on in section 5.1 of the report. The yearly totals above include the adjustments.

To receive notification of updated or new information, please visit and register at www.jersey.com/marketinginfo

Appendix 13

JerseyLink - Jersey Tourism Central Reservations

	No. of Bednights	Value of Bookings	Value per Bednight
2007	42,735	£1,555,654	£36
2008	30,720	£1,156,832	£38
2009	30,441	£1,145,546	£38
2010	27,273	£1,049,332	£38
2011	27,194	£1,099,175	£40

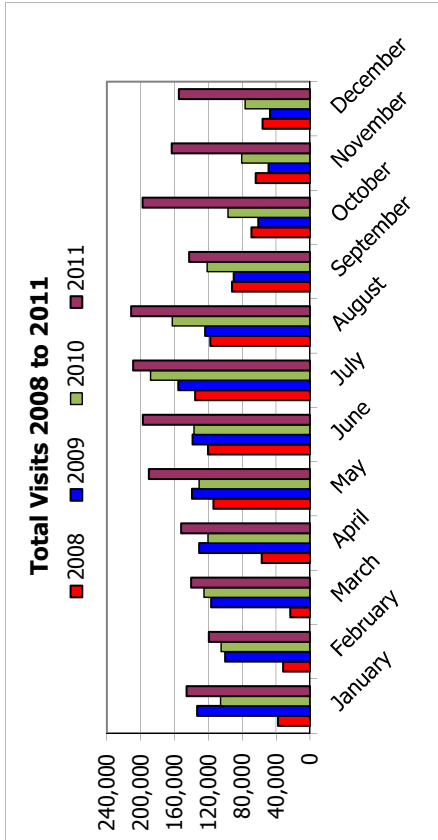


To receive notification of updated or new information, please visit and register at www.jersey.com/marketinginfo

Appendix 14.1

Visits to www.jersey.com 2008 - 2011

	2008	2009	2010	2011
January	37,811	133,488	105,749	145,846
February	31,775	100,419	105,249	119,739
March	23,273	116,726	125,271	140,532
April	57,127	131,164	120,640	152,430
May	114,242	139,506	131,082	190,556
June	120,737	138,809	136,978	197,386
July	135,643	155,626	188,311	208,874
August	117,762	123,990	162,627	211,469
September	92,250	90,271	121,632	142,766
October	69,374	61,126	96,894	197,729
November	64,121	49,174	80,748	163,300
December	56,209	47,420	76,693	155,112
Total	920,324	1,287,719	1,451,874	2,025,739



source: Google Analytics

Appendix 14.2

Visits to www.jersey.com by country of residence

	UK			France			Germany			
	2008	2009	2010	2008	2009	2010	2008	2009	2010	2011
January		96,305	63,936		6,228	7,779		4,412	4,976	7,121
February		60,089	58,870		8,826	11,233		8,480	7,520	4,861
March		69,625	71,914		12,498	15,098		9,493	6,661	5,914
April	42,092	77,990	60,769	5,088	17,426	18,723	1,898	6,094	6,698	5,101
May	86,306	84,225	66,734	8,106	15,777	19,926	3,707	8,321	8,154	6,726
June	92,527	85,851	72,429	6,988	12,184	20,189	4,508	6,009	6,944	19,311
July	103,435	90,011	105,932	9,196	20,362	29,514	4,899	6,039	6,610	8,189
August	90,998	73,718	87,866	7,816	12,852	22,893	4,182	4,678	5,379	6,739
September	71,224	50,044	66,206	4,503	9,550	13,182	3,225	3,144	3,756	4,203
October	48,294	26,365	44,963	6,502	9,799	14,112	2,268	2,723	2,915	6,440
November	39,369	18,179	34,003	4,450	6,493	11,615	2,357	2,485	2,920	7,322
December	31,030	17,211	32,257	4,445	6,298	11,414	2,188	2,670	2,604	9,919
Total	605,275	749,613	765,879	57,094	138,293	195,678	29,232	64,548	65,137	91,846

Source: Google Analytics

Appendix 15

Total Passenger Arrivals 2007 - 2011

	TOTAL AIR ARRIVALS					TOTAL SEA ARRIVALS					TOTAL ARRIVALS				
	2007	2008	2009	2010	2011	2007	2008	2009	2010	2011	2007	2008	2009	2010	2011
JAN	41,646	43,417	39,895	35,659	38,680	7,345	6,669	6,800	7,432	8,138	48,991	50,086	46,695	43,091	46,818
FEB	44,208	49,938	42,565	42,376	41,755	8,655	10,057	9,002	9,559	10,660	52,863	59,995	51,567	51,935	52,415
MAR	55,439	60,822	52,914	52,865	50,441	15,192	12,484	11,686	12,350	14,804	70,631	73,306	64,600	65,215	65,245
APR	62,562	66,970	60,142	49,284	61,139	38,785	32,080	34,125	37,803	38,752	101,347	99,050	94,267	87,087	99,891
MAY	73,530	81,287	71,399	69,284	69,560	45,887	47,905	45,058	44,835	44,045	119,417	129,192	116,457	114,119	113,605
JUN	79,165	78,557	72,778	74,339	74,559	49,305	48,531	45,537	46,485	48,894	128,470	127,088	118,315	120,824	123,453
JUL	83,093	86,307	80,546	82,698	83,719	54,952	53,424	54,045	56,241	59,002	138,045	139,731	134,591	138,939	142,721
AUG	89,233	92,544	84,332	86,408	84,381	71,686	72,516	75,513	76,363	72,343	160,919	165,060	159,845	162,771	156,724
SEP	79,933	77,639	72,714	74,003	74,081	47,327	38,751	42,786	43,253	43,100	127,260	116,390	115,500	117,256	117,181
OCT	65,238	64,671	61,009	64,331	63,617	23,983	20,126	22,766	22,354	32,203	89,231	84,797	83,775	86,685	95,820
NOV	56,720	50,581	49,047	47,220	46,662	11,928	8,705	7,676	8,629	9,359	68,648	59,286	56,723	55,849	56,021
DEC	50,886	47,721	46,481	41,782	47,000	8,637	9,169	10,690	12,455	11,677	59,523	56,890	57,171	54,237	58,677
SUMMER	172,326	178,851	164,878	169,106	168,100	126,638	125,940	129,558	132,604	131,345	298,964	304,791	294,436	301,710	299,445
SPRING	215,257	226,814	204,319	192,907	205,258	139,977	128,516	124,720	129,123	131,691	349,234	355,330	329,039	322,030	336,949
AUTUMN	145,171	142,310	133,723	138,334	137,698	71,320	58,877	65,552	65,607	75,303	216,491	201,187	199,275	203,941	213,001
WINTER	248,899	252,479	230,902	219,902	224,538	51,757	47,084	45,854	50,425	54,638	300,656	299,563	276,756	270,327	279,176
YEAR	781,653	800,454	733,822	720,249	735,594	383,692	360,417	365,684	377,759	392,977	1,165,345	1,160,871	1,099,506	1,098,008	1,128,571

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

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

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

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

Appendix 16

Passenger Arrivals from the UK 2007 - 2011

	TOTAL UK AIR ARRIVALS					TOTAL UK SEA ARRIVALS					TOTAL UK ARRIVALS				
	2007	2008	2009	2010	2011	2007	2008	2009	2010	2011	2007	2008	2009	2010	2011
JAN	34,546	35,850	32,077	29,064	31,864	1,561	1,453	1,337	1,664	1,982	36,107	37,303	33,414	30,728	33,846
FEB	37,030	41,709	34,985	35,193	35,120	1,719	2,062	1,753	2,454	2,372	38,749	43,771	36,738	37,647	37,492
MAR	47,577	52,244	44,470	43,912	41,808	3,507	3,238	3,401	3,335	3,171	51,084	55,482	47,871	47,247	44,979
APR	55,642	56,638	50,513	41,125	51,859	8,397	6,508	8,523	11,591	9,884	64,039	63,146	59,036	52,716	61,743
MAY	65,454	69,398	61,135	58,428	59,271	9,347	10,049	10,186	9,419	10,357	74,801	79,447	71,321	67,847	69,628
JUN	68,156	66,995	61,667	62,999	63,169	10,377	9,451	11,093	9,343	11,229	78,533	76,446	72,760	72,342	74,398
JUL	73,354	73,844	68,830	70,529	71,845	13,896	12,825	14,117	12,858	15,416	87,250	86,669	82,947	83,387	87,261
AUG	79,444	80,493	73,262	75,260	73,118	17,243	18,994	19,859	18,600	20,205	96,687	99,487	93,121	93,860	93,323
SEP	70,377	65,240	62,334	62,649	63,382	10,214	9,013	10,785	10,085	10,771	80,591	74,253	73,119	72,734	74,153
OCT	56,778	54,352	52,587	54,404	54,349	8,122	6,720	7,435	7,586	8,802	64,900	61,072	60,022	61,990	63,151
NOV	47,692	41,830	40,675	39,460	38,570	2,835	1,975	2,259	2,475	2,372	50,527	43,805	42,934	41,935	40,942
DEC	44,455	40,635	39,959	36,211	40,437	2,023	2,288	2,474	3,439	3,042	46,478	42,923	42,433	39,650	43,479
SUMMER	152,798	154,337	142,092	145,789	144,963	31,139	31,819	33,976	31,458	35,621	183,937	186,156	176,068	177,247	180,584
SPRING	189,252	193,031	173,315	162,552	174,299	28,121	26,008	29,802	30,353	31,470	217,373	219,039	203,117	192,905	205,769
AUTUMN	127,155	119,592	114,921	117,053	117,731	18,336	15,733	18,220	17,671	19,573	145,491	135,325	133,141	134,724	137,304
WINTER	211,300	212,268	192,166	183,840	187,799	11,645	11,016	11,224	13,367	12,939	222,945	223,284	203,390	197,207	200,738
YEAR	680,505	679,228	622,494	609,234	624,792	89,241	84,576	93,222	92,849	99,603	769,746	763,804	715,716	702,083	724,395

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

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

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

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

Appendix 17

Inter-Island Passenger Arrivals 2007 - 2011

	TOTAL INTER-ISLAND AIR ARRIVALS					TOTAL INTER-ISLAND SEA ARRIVALS					TOTAL INTER-ISLAND ARRIVALS				
	2007	2008	2009	2010	2011	2007	2008	2009	2010	2011	2007	2008	2009	2010	2011
JAN	5,300	5,603	5,095	4,275	4,904	414	345	261	473	550	5,714	5,948	5,356	4,748	5,454
FEB	5,691	6,049	5,396	5,376	5,523	699	570	827	578	1,241	6,390	6,619	6,223	5,954	6,764
MAR	7,256	7,071	6,589	7,612	7,510	1,547	924	917	987	1,561	8,803	7,995	7,506	8,599	9,071
APR	5,873	7,249	5,705	5,644	6,074	5,019	3,553	4,063	3,005	5,631	10,892	10,802	9,768	8,649	11,705
MAY	6,044	7,052	5,635	6,360	6,693	7,314	7,583	7,259	7,148	7,651	13,358	14,635	12,894	13,508	14,344
JUN	7,151	7,143	7,023	6,534	7,027	7,265	7,257	6,440	5,690	7,141	14,416	14,400	13,463	12,224	14,168
JUL	5,818	7,019	6,221	6,587	6,749	8,188	7,827	8,994	8,507	11,533	14,006	14,846	15,215	15,094	18,282
AUG	5,854	6,372	5,313	5,760	5,801	12,514	11,089	12,943	12,221	13,660	18,368	17,461	18,256	17,981	19,461
SEP	6,400	7,243	6,564	7,012	6,888	7,525	5,340	6,210	6,400	7,487	13,925	12,583	12,774	13,412	14,375
OCT	6,613	7,389	6,694	7,020	6,756	4,387	2,496	2,383	2,897	6,369	11,000	9,885	9,077	9,917	13,125
NOV	7,564	7,058	7,131	6,801	7,403	1,068	631	706	1,236	1,775	8,632	7,689	7,837	8,037	9,178
DEC	5,274	5,380	5,385	4,592	5,441	1,037	1,158	1,504	1,987	1,818	6,311	6,538	6,889	6,579	7,259
SUMMER	11,672	13,391	11,534	12,347	12,550	20,702	18,916	21,937	20,728	25,193	32,374	32,307	33,471	33,075	37,743
SPRING	19,068	21,444	18,363	18,538	19,794	19,598	18,393	17,762	15,843	20,423	38,666	39,837	36,125	34,381	40,217
AUTUMN	13,013	14,632	13,258	14,032	13,644	11,912	7,836	8,593	9,297	13,856	24,925	22,468	21,851	23,329	27,500
WINTER	31,085	31,161	29,596	28,656	30,781	4,765	3,628	4,215	5,261	6,945	35,850	34,789	33,811	33,917	37,726
YEAR	74,838	80,628	72,751	73,573	76,769	56,977	48,773	52,507	51,129	66,417	131,815	129,401	125,258	124,702	143,186

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

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

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

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Appendix 18 Continental Passenger Arrivals 2007 - 2011

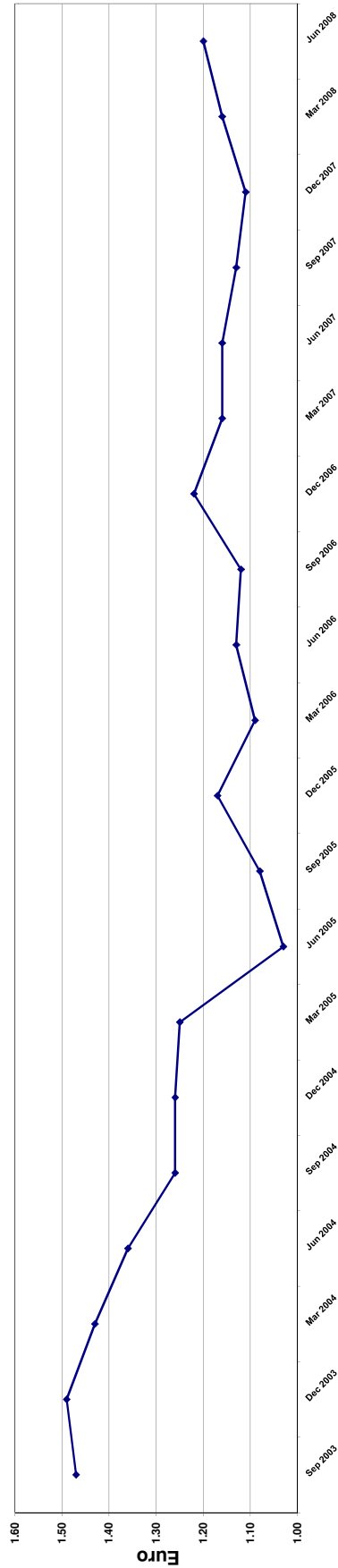
	TOTAL CONTINENTAL AIR ARRIVALS					TOTAL CONTINENTAL SEA ARRIVALS					TOTAL CONTINENTAL ARRIVALS				
	2007	2008	2009	2010	2011	2007	2008	2009	2010	2011	2007	2008	2009	2010	2011
JAN	1,800	1,964	2,723	2,320	1,912	5,370	4,871	5,202	5,295	5,606	7,170	6,835	7,925	7,615	7,518
FEB	1,487	2,180	2,184	1,807	1,112	6,237	7,425	6,422	6,527	7,047	7,724	9,605	8,606	8,394	8,159
MAR	606	1,507	1,855	1,341	1,123	10,138	8,322	7,368	8,028	10,072	10,744	9,829	9,223	9,369	11,195
APR	1,047	3,083	3,924	2,515	3,206	25,369	22,019	21,539	23,207	23,237	26,416	25,102	25,463	25,722	26,443
MAY	2,032	4,837	4,629	4,496	3,596	29,226	30,273	27,613	27,582	26,037	31,258	35,110	32,242	32,078	29,633
JUN	3,858	4,419	4,088	4,804	4,363	31,663	31,823	28,004	31,452	30,524	35,521	36,242	32,092	36,256	34,887
JUL	3,921	5,444	5,495	5,582	5,125	32,868	32,772	30,934	34,876	32,053	36,789	38,216	36,429	40,458	37,178
AUG	3,935	5,679	5,757	5,388	5,462	41,929	42,433	42,711	45,385	38,478	45,864	48,112	48,468	50,773	43,940
SEP	3,156	5,156	3,816	4,342	3,811	29,588	24,398	25,791	26,748	24,842	32,744	29,554	29,607	31,090	28,653
OCT	1,847	2,930	1,728	2,907	2,512	11,484	10,910	12,948	11,871	17,032	13,331	13,840	14,676	14,778	19,544
NOV	1,464	1,693	1,241	959	689	8,025	6,099	4,711	4,918	5,212	9,489	7,792	5,952	5,877	5,901
DEC	1,157	1,706	1,137	979	1,122	5,577	5,723	6,712	7,029	6,817	6,734	7,429	7,849	8,008	7,939
SUMMER	7,856	11,123	11,252	10,970	10,587	74,797	75,205	73,645	80,261	70,531	82,653	86,328	84,897	91,231	81,118
SPRING	6,937	12,339	12,641	11,815	11,165	86,258	84,115	77,156	82,241	79,798	93,195	96,454	89,797	94,056	90,963
AUTUMN	5,003	8,086	5,544	7,249	6,323	41,072	35,308	38,739	38,619	41,874	46,075	43,394	44,283	45,868	48,197
WINTER	6,514	9,050	9,140	7,406	5,958	35,347	32,440	30,415	31,797	34,754	41,861	41,490	39,555	39,203	40,712
YEAR	26,310	40,598	38,577	37,440	34,033	237,474	227,068	219,955	232,918	226,957	263,784	267,666	258,532	270,358	260,990

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

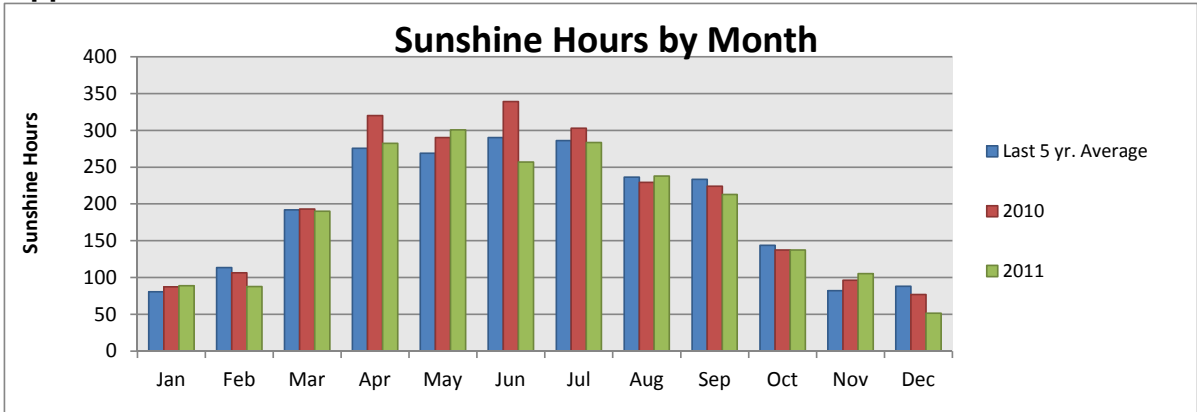
Appendix 19 Selected exchange rates against sterling since March 2007

	Den	Nor	Swe	Swz	Euro	USA	Can	Aus	Japan
2007 Mar	10.97	11.94	13.73	2.39	1.47	1.96	2.27	2.43	231.44
2007 Jun	11.05	11.85	13.76	2.46	1.49	2.00	2.31	2.36	247.77
2007 Sep	10.66	11.09	13.20	2.37	1.43	2.02	2.03	2.30	234.08
2007 Dec	10.11	10.79	12.81	2.25	1.36	1.99	1.95	2.27	225.43
2008 Mar	9.41	10.17	11.85	1.99	1.26	1.99	2.03	2.17	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	153.90
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	125.60
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

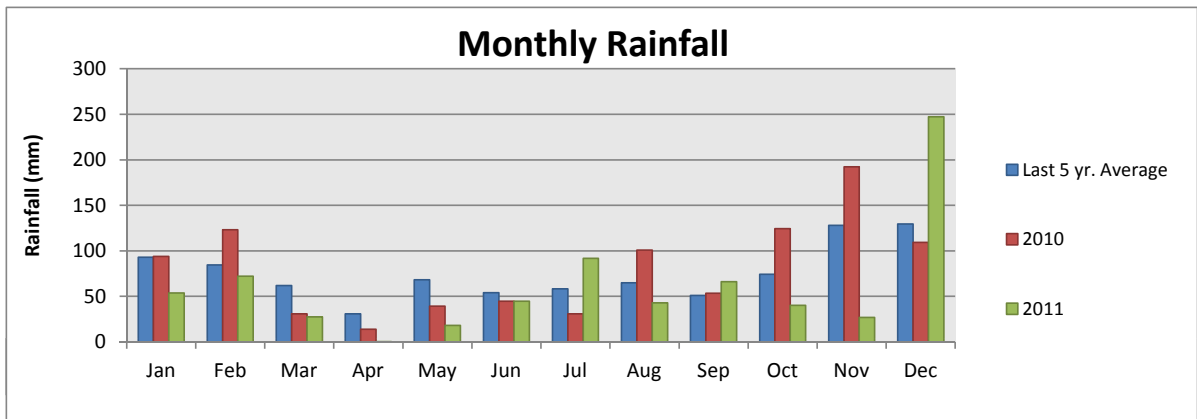
£ Sterling vs. Euro 2007 - 2011



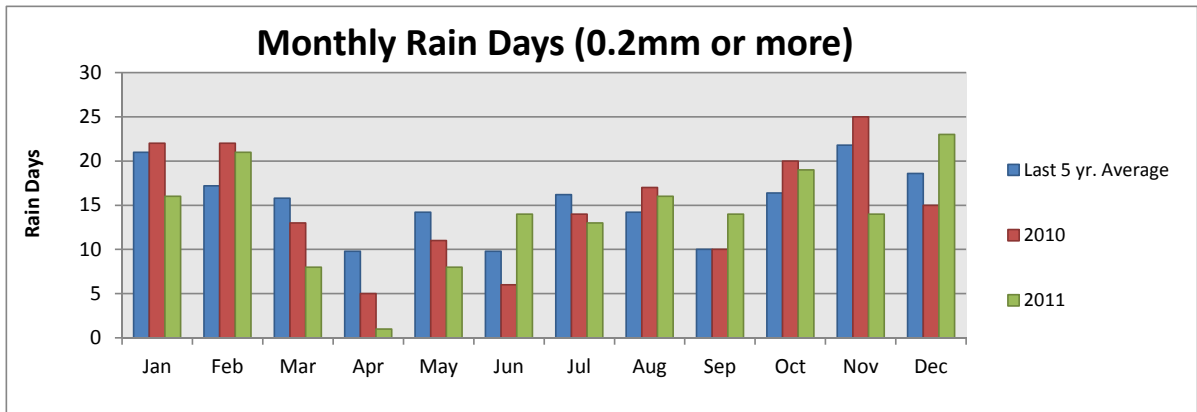
Appendix 20



Figures are recorded at Fort Regent



Figures are recorded at St. Louis Observatory




Figures are recorded at St. Louis Observatory

Source: Jersey Meteorological Department

www.jerseymet.gov.je

Appendix 21



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	ARRIVAL DATE	DEPARTURE DATE
<p>FIRST ADULT (16+) (full name and nationality must be completed for all adults within a room)</p> <p>Surname</p> <p>Forename</p> <p>Title (Mr/s etc.)</p> <p>Date of birth</p> <p>Nationality</p>				<p>DD MM YY</p> <p>DD MM YY</p>	
<p>SECOND ADULT (16+)</p> <p>Surname</p> <p>Forename</p> <p>Nationality</p>				<p>DD MM YY</p> <p>DD MM YY</p>	
<p>THIRD ADULT (16+)</p> <p>Surname</p> <p>Forename</p> <p>Nationality</p>				<p>DD MM YY</p> <p>DD MM YY</p>	
<p>FOURTH ADULT (16+)</p> <p>Surname</p> <p>Forename</p> <p>Nationality</p>				<p>DD MM YY</p> <p>DD MM YY</p>	

MAIN PURPOSE OF VISIT (First adult only) Holiday Business Sport 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.

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

