

Jersey Tourism  
A Year in Review 2007



# Jersey Tourism Annual Report

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# Foreword from the Minister for Economic Development

In addition to its valuable contribution to the economy with visitor spend in the order of £234m, the industry makes a valuable contribution to the social and cultural well being of the residents by underpinning the viability and quality of restaurants, entertainment, leisure facilities and transport links to the Island. A Jersey without the vibrancy of the visitor economy would be a far less attractive environment in which to live and work.

In addition the tourism industry has played its part in the overall economic success of Jersey during 2007 by achieving increased visitor numbers for the first time in a number of years, showing that the industry is capable of recovery and making an increased contribution to the economy. Our policies of encouraging closer integration through States departments and particularly the Airport and Harbour within Economic Development are having a positive affect on the route network and through that and successful marketing campaigns are making Jersey more attractive to potential visitors.

The future continues to look bright with positive early year arrivals data in 2008 which when coupled with the enormous investments which have been made in the Jersey product should sustain a continuation of the growth in visitor numbers. The jersey.com website has been completely rebuilt during the past year and now stands proudly at the heart of everything that we do enjoying high levels of customer satisfaction and providing significantly improved channels to market for suppliers throughout the Industry.

The future structure of the tourism and marketing organisation within Economic Development will be decided later this year following consultants reports and discussions with the industry. The concept of a public, private, partnership operating with an independent board is under consideration with the objective of raising additional revenue for marketing from the industry which would then enjoy increased influence over the organisation and its activities. Many examples of organisations successfully operating partnerships for tourism promotion can be found throughout the UK.

I have always strongly supported the promotion of event led tourism, which is capable of attracting increased numbers of visitors to the island as well as adding enjoyment for local residents. The leading high profile events, the Liberation Festival, the Battle of Flowers, the International Air Display and La Fête de Noué all depend upon the enthusiasm of local people who give their time and energy to ensure the overall success of these important festivals and who deserve a strong vote of thanks.

With continuing high levels of customer satisfaction, and increasing confidence being shown in the industry through private sector investment Jersey is well placed to challenge for further increases to volumes of both business and leisure visitors and I am confident of our future success.

On behalf of the Ministerial team at Economic Development I would like to thank everyone in the industry and particularly the staff within the department for their contribution in 2007 and for helping to make it a turning point for the future success of tourism in Jersey.



Philip Ozouf  
Minister for Economic Development.

# Jersey Tourism Annual Report 2007

Several of the long awaited investment projects were completed in 2007 resulting in the opening of the Royal Yacht at the Weighbridge and the Radisson on the St Helier Waterfront. These fabulous new hotels are now contributing to the quality of the Jersey offering which has significantly improved in the recent past through these and other investments and which will continue to enhance visitor satisfaction and numbers.

The emergence of new products coupled with very successful marketing campaigns has resulted in growth in the visitor economy with an increase of 2.1% in staying leisure visitor numbers, the first growth in this category for a number of years. Business visitors have also grown by a significant 17% to 72,000, the highest level for several years. With a strong Euro the prospects for expanding European markets are good, particularly from the nearby French coast from which we have such strong transport links.

Success in the leisure market is dependent upon direct and affordable transport links as well as good destination marketing. Jersey continues to be well served from an increasing number of UK airports with a large proportion of relatively low cost flights from regional carriers and by tour operator charters. Whilst some of the brand names have changed during the year, the overall range and choice has been maintained and improved with new services to a number of airports including Heathrow which had not been served for some years. By sea the number of links to the nearby French coast has expanded with two new ferry operations complimenting the two previously operated services.

In October the department moved into new offices in Liberation Place at the Western end of the Island site. The new facilities are much improved, particularly the visitor services centre which is bright and modern and uses some of the latest technology to enhance the quality of service to our visitors. It may take some time for visitors to become familiar with the new location but once the remainder of Island site has been completed and opened later in 2008 the visitor experience should be significantly enhanced.

A new Jersey Pass is being introduced for the summer of 2008 and this scheme should benefit participating attraction owners by increasing visitor numbers as well as our customers by providing increased value. The pass will be sold in advance by tour operators and from the Visitor Services Centre providing multiple entries for an inclusive price. The concept has proved to be highly successful in cities such as London, Paris and New York and has been tailored to suit the Jersey market.

The new destination brand featuring the golden bird and 'life enriching' strap-line was introduced with the autumn campaign following an extensive programme of market research which indicated that it would be well received among Jersey's target audience. The new look is also featuring on the jersey.com website which sits at the heart of marketing and communications and which has been totally re-engineered to provide improved navigation for consumers and a significantly enlarged range of selling opportunities for industry partners.

## UK Marketing Campaign

Significant changes were made to the advertising in 2007 following the development of a new advertising strategy and campaign with a new agency.

The 2007 "Live the Life" campaign majored with a new 30 second TV commercial which broke mid-January and continued for 3 weeks. The commercials were then off air for a week, reappearing with a mix of 30 and 10 second ads for one week, followed by 10 second commercials until early March. This was the first time, for many years, that Jersey had a significant presence on TV for a 6 week period with a dedicated brand commercial during a key consideration time for holiday decisions. This was reinforced with a heavy-weight national press campaign from January through to March.

Four direct mail and e-mail campaigns were run as part of the integrated mix of activity during the year, with a similar look and feel of the TV, press and pure Jersey magazine, to ensure synergy across the campaign. All activity, where possible, was supported with partner offers to give an immediate and tactical call-to-action. Additional activity complemented the UK campaign, including national and regional press with partners, a tactical press campaign to drive business into jersey.com special offers, online pay per click and search engine optimisation. In addition to this, a direct mail campaign was employed to reconnect with customers that had not been in touch within the last 4 years - this small campaign generated a 7% response and 3% conversion.

The TV advertisement alone was seen by 17 million viewers within Jersey's target audience at least 3 times, buy in from the industry during 2007 was up 30% on 2006, and the awareness of Jersey rose from just 2% to 7% by the year end, a massive increase considering our marketing budget, leading to an increase of 1.5% in total visitors to the island.

Performance is monitored using several key metrics that are detailed within this report, such as web (unique) visits, JerseyLink accommodation bookings and monthly staying leisure visitor volumes and spend per visitor. Each campaign is also measured through response rates and conversion levels.

## Advertising Tracking Survey

Advertising tracking took place in three waves, to measure the effectiveness of the campaign in creating awareness of Jersey. The first wave took place in November 2006 and created the benchmark. The second wave ran in March 2007 after the "burst" of advertising activity and the final wave ran in June, to assess how the continued "drip" of the campaign was retaining awareness of Jersey in the marketplace. Key results were:

- Prompted ad recall showed a significant uplift mid-wave, from 2% to 10% with some settling back to 6% in June.
- Only Euro Disney, Centre Parcs and Wales showed similar significant shifts, but with very different expenditure.
- Visually prompted awareness from unbranded ads rose significantly for the TV advertising (from 12% to 18%) and directionally for the press ads (from 17% to 21%)
- Ad recognition was highest mid-wave (41% of those recalling the ad)
- Ad response for those correctly identifying the ad was strongest at the final post-wave (31%)

## Brochure Distribution

The target for brochure requests for 2007 was 100,000, and this was exceeded by nearly 23,000. Whilst this is an excellent achievement in terms of consumer interest, care has to be taken to ensure that conversion arises from additional requests. However the new format of pureJersey is being very well received by both consumers and partners.

## France & Germany

The French campaign consisted of outdoor posters, press and online. Posters work extremely well in France and are targeted at French Holiday makers in the Brittany and Normandy areas. Joint marketing with the ferry operators is also an effective method of increasing demand from France, particularly for the day excursion market which requires tactical support throughout the summer months.

The Press included “wraps” on the TV magazine for Brittany & Normandy, TV Magazine IDF. The online campaign was targeted at six key websites and was displayed to six million web visitors, which converted into a 6% increase in leisure visitors.

The Germany campaign was targeted around direct departure points, Düsseldorf, Hanover, Frankfurt and Munich. Capacity was increased with bigger aircraft being used to service the Islands from this key market.

The German campaign focused on the trade with trade press ads and exhibitions. The consumer campaign was a mix of Radio and press, usually in conjunction with trade partners.

pureJersey and our main guides and website are translated into both French and German.

## Public Relations

Extensive public relations campaigns were undertaken in our three main target markets of the UK, France and Germany. In the UK this activity was conducted nationally and regionally in conjunction with the main tourism advertising campaign, with a particular emphasis on communicating new product areas and messages not easily conveyed through advertising.

In France the Jersey activity was run alongside an online and poster advertising campaign. It was concentrated in the Grand Ouest region, which is where the majority of visitors and travel links originate from. The “Tour de Bretagne” cycling tour ventured out of Brittany for the first time to stage time trials in Jersey. The highly successful event resulted in significant TV and radio coverage.

In Germany public relations is the main tourism promotional activity, being supported only by joint trade advertising and promotions. Activity was conducted nationally and regionally within catchment areas of direct seasonal charter flights to the island.

Subsidiary activities were conducted in the Netherlands, Belgium, Ireland, plus the rest of the world in conjunction with Visitbritain, the national tourism promotion agency for the United Kingdom.

### Media visits

A key element of the PR activity is inspiring targeted media to visit Jersey and bring it to life through media exposure. In 2007 visits managed by the team covered;

Country	Print titles	Television productions	Radio programmes	Online Media	Totals
UK	106	13	4	17	140
France	12	5	2		19
Germany	21	3	2	2	28
Benelux	12			1	13
Other	16				16
Totals	167	21	8	20	216

Apart from the organisation and facilitation of the above, including the Tour de Bretagne, other elements of the campaigns covered exhibitions, radio campaigns, route launches, press releases etc.

### Media exposure

All tourism media exposure in the UK, France and Germany is measured and evaluated by an independent agency, which produced the following results.

UK – 915 items of coverage were generated including 10 TV programmes several of which were repeated several times.

Highlights were;

- BBC – Coast – Third series
- BBC – The Nature of Britain – Alan Titchmarsh
- BBC – Country file
- BBC – Food heroes – Rick Steins
- Sky – Dream Fishing – John Wilson
- BBC – Chelsea Flower Show – Eric Young Orchid Foundation

The cost per thousand people reached is calculated at £7.51. Bench marked against standard industry indicators this represents a high return on investment.

A limited amount of analysis was undertaken on French and German coverage;

- In France 123 items of coverage were generated, all which were favourable, the highlight being the Tour de France time trials, which generated 17 items of broadcast coverage alone.
- In Germany 238 items of coverage were generated, all with positive coverage, including eight television programmes.

During 2008 the campaigns will continue in the same country markets as in 2007, with additional activity in Switzerland, to support the new Swiss direct air services. Regional media coverage in the UK and Ireland will continue to be focused on catchment areas of scheduled and charter flights, particularly supporting new routes and operators. The same applies in Germany where a new scheduled service will operate from Düsseldorf during the summer months.

A PR forum has been set up between tourism and tourism PR partners, through which the department will seek to deliver more effective PR to the benefit of all.

## Product Development and Events

In 2007 over 40 events took place throughout the year. Whilst involved in the majority, of these, 12 were specifically organised by the Tourism events team, including a new event to mark Liberation Day to attract new business to the Island. Highlights included 'Easter at the Elms', 'the spring and autumn walking weeks, a Black Butter event and La Fête de Noué all of which attracted increased numbers of visitors to Jersey in the shoulder season and which underpinned and supported the Jersey brand.

'High season' activities to provide animation and enhance the visitor experience included the newly developed Jersey Street Theatre Festival, which took place in and around St. Helier, the 'Out of the Blue' maritime festival at the Harbour and the 'Wet & Wild' festival which showcased the island's every growing 'active' product.

The influence of festivals and events was measured in the 2006 Visitor Survey with 8% of UK visitors indicating that the main purpose of their visit was to attend a festival and/or an event. 11% of winter visitors confirmed that they were influenced to some extent by a festival or event.

## Grants and Sponsorships

Jersey Tourism granted financial assistance to over 19 external event organisers. This process involves developing relationships, issuing sponsorship contracts and providing assistance during the actual event where necessary before undertaking post event analysis and evaluation. New events included the Jersey Seniors Open golfing event – part of the PGA programme which returns to the island in 2008 and a new food event in February/March called 'Winter Warmers'.

In addition to the specific events programme supported by the department, grants were provided for the Arts Centre and a programme of art and cultural entertainment at Howard Davis Park.

## Branding and Distribution

New projects included the branding of the new Connex bus station, the Airport arrivals area (phase I) and the Albert Pier terminal for visiting French passengers. This work will continue in 2008 with Phase II of the Airport branding project and enhanced brochure distribution in the arrivals area. Work continues on improving the visitor experience and improvements were made to areas such as Gorey with new flags and banners and the development of ideas for a public realm strategy.

## Product Development

Aside from the festival and event development, the team continued to work closely with other agencies such as 'Art in the Frame', the National Trust for Jersey, Jersey Heritage, Genuine Jersey and the Planning and Environment department on developing arts and heritage tourism, walking and cycling routes, green initiatives and further promotion of local products and services including 'Farmers' Markets and Genuine Jersey food events.

Jersey's entry to the Britain in Bloom competition is managed through Jersey Tourism and national success was achieved in 2007 with the Parish of Grouville winning the 'Best Small Town' and RHS Floral Excellence award.

An Events Manual was also developed for external event organisers which can be found on [www.jersey.com](http://www.jersey.com).

## The Conference Market

The number of staying conference delegates increased to 9,800 from 6,800 in 2006.

Corporate delegates continue to make up the bulk of staying delegates contributing 90% of the total number. The overall number of events rose from 251 to 311.

The majority of events are for smaller functions of less than 50 delegates, with the number of 100+ delegates remaining static at 10.

The new meeting and bedroom facilities, particularly in the 4star market were pivotal in securing this success. Of particular note was a major pharmaceutical conference held over 3 separate weeks in February and March bringing in over 1300 delegates to the Island.

The Conference Bureau's marketing was awarded with success at the Meetings Industry Marketing Awards receiving the Silver award for print advertising and the Gold for Destination Brochure beating competition from over 100 other entries. Looking forward the next two years are anticipated to be positive with substantial conferences booked from the Association and Rotary markets.

# Financial Report

	"2007 Actual £000"	"2006 Actual £000"
<b>Corporate</b>		
Strategy and Policy	1,794	506
Research and Planning	253	182
<b>Communications</b>		
Advertising and Media	2,247	1,717
Distribution	214	307
Marketing Services	551	164
Product Development	989	860
<b>Market Development</b>		
Public Relations	549	557
Trade Relations	386	1,634
Consumer and Media Relations	885	346
Visitor Services	282	303
Net Revenue Expenditure	£ 8,150	£ 6,576

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

## Key Financial Results

Total net revenue expenditure for 2007 increased by £1.6 million (+24%) when compared with 2006.

The majority of this increase can be attributed to the provision and successful implementation of a comprehensive external transport strategy. 2007 saw unprecedented supplier demand for new air and sea routes for which the Department provided seed funds, subsidies and marketing support to capitalise on this demand. Additionally, roll out of the Island Brand and launch of the Jersey.com website also contributed to the increased spend in 2007 as compared to 2006

### Corporate expenditure increased by £1.4 million (+198%)

The increase in Corporate Strategy and Policy expenditure relates to air and sea route development (£750,000), which resulted in a 4.5% increase in visitor traffic in 2007. Additionally, relocation to the new Tourism Building at Liberation Place incurred one-off costs of £325,000 and £50,000 was spent on planning and professional fees for relocating the other sections of the Department to Jubilee Wharf. Corporate Research and Planning expenditure increased by £71,000 as a result of the Visitor Exit Survey, which is conducted once every few years.

### Communications expenditure increased by £954,000 (+31%)

Advertising & Media spend increased by £530,000 primarily due to incorporation of the Jersey Royals marketing campaign into the main Island Brand marketing campaign. Moreover, reallocation of the joint marketing spend from Trade Relations led to an increase in this area in 2007. The development of the Jersey.com website also contributed to the increase in Marketing Services expenditure.

### Market Development expenditure reduced by £739,000 (-26%)

Trade Relations expenditure decreased by £1.2 million, which was offset somewhat by the reallocation of spend to Consumer and Media Relations. However, the decrease is mainly due to the movement of a large proportion of the promotional expenditure to the Marketing Services area.

# 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 and 2007.

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 2007 and covered over 100,000 departing passengers (nearly 9% 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 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.

2007 visitor volume figures are based upon results from the 2007 exit survey. Following advice from the States of Jersey Statistics Unit, 2006 visitor volume estimates were revised based upon a statistical smoothing process using data from the 2007 survey.

## Visitor expenditure

Visitor expenditure estimates are based upon the most recent visitor expenditure survey undertaken in 2007.

**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 2003 - 2007

	2003 Jersey Travel Survey		2005 Jersey Travel Survey		2007 Jersey Travel Survey	
	2003	2004	2005	2006	2007	2007 vs. 2006
On-Island Visitor Expenditure	£213 million	£222 million	£220 million	£221 million	£234 million	5.9%
On-Island Visitor Expenditure Reflated to 2007 levels	£247 million	£243 million	£236 million	£230 million	£234 million	1.9%
<b>Total Tourism Visitor Volume</b>	<b>749,000</b>	<b>747,000</b>	<b>752,300</b>	<b>728,500</b>	<b>739,300</b>	<b>1.5%</b>
<b>Total bed nights sold over year</b>	<b>2.19 million</b>	<b>2.19 million</b>	<b>2.14 million</b>	<b>2.07 million</b>	<b>2.08 million</b>	<b>0.4%</b>
<b>Total room nights sold over year</b>	<b>1.08 million</b>	<b>1.06 million</b>	<b>1.04 million</b>	<b>1.02 million</b>	<b>1.03 million</b>	<b>0.8%</b>
Staying Leisure Visitor Volume	378,900	384,500	380,900	368,200	375,900	2.1%
Staying Leisure Visitor Average Stay	5.0	4.9	4.8	4.8	4.6	-4.2%
Staying Leisure Visitor On-Island Expenditure	£153 million	£157 million	£155 million	£155 million	£160 million	3.5%
Staying Leisure Visitor On-Island Expenditure Reflated to 2007 levels	£178 million	£172 million	£167 million	£162 million	£160 million	-0.4%
Staying Business Visitor Volume	64,100	59,100	56,600	61,600	72,000	16.8%
Staying Business Visitor Average Stay	2.1	2.2	2.2	2.1	2.2	4.8%
Staying Business Visitor On-Island Expenditure	£18 million	£17 million	£17 million	£19 million	£24 million	27.5%
Staying Business Visitor On-Island Expenditure Reflated to 2007 levels	£21 million	£20 million	£18 million	£19 million	£24 million	22.7%
Staying Conference Visitor Volume	4,200	5,500	5,900	8,800	9,700	10.2%
Staying Conference Visitor Average Stay	2.9	4.3	3.2	3.4	3.0	-11.8%
Staying Conference Visitor On-Island Expenditure	£2 million	£4 million	£3 million	£5 million	£5 million	5.9%
Staying Conference Visitor On-Island Expenditure Reflated to 2007 levels	£2 million	£4 million	£3 million	£5 million	£5 million	1.9%
Day Trip Visitor Volume	160,200	147,500	145,700	139,400	141,900	1.8%
Day Trip Visitor On-Island Expenditure	£8 million	£7 million	£7 million	£6 million	£8 million	19.8%
Day Trip Visitor On-Island Expenditure Reflated to 2007 levels	£8 million	£7 million	£7 million	£6 million	£8 million	15.3%
Hospitality sector <i>companies</i> tax revenue <sup>1</sup>	5.0 million	5.9 million	5.9 million	5.3 million	n/a	
Hospitality sector jobs <sup>2</sup>	6,360	6,130	6,110	6,160	6,210	0.2%
Registered accommodation establishments	178	168	166	161	159	-1.2%
Registered tourism bed spaces <sup>3</sup>	14,347	13,710	13,400	13,100	13,100	0.0%
Total bed nights available over year	3,416,500	3,425,300	3,394,400	3,395,800	3,351,300	-1.3%
Average yearly bed space occupancy	64%	64%	63%	61%	62%	+1 % point <sup>5</sup>
Average yearly room space occupancy	70%	70%	70%	67%	70%	+3 % points <sup>5</sup>
August bed space occupancy	91%	91%	89%	82%	84%	+2 % points <sup>5</sup>
August room space occupancy	92%	93%	92%	88%	90%	+2 % points <sup>5</sup>
Total booking revenue generated by JerseyLink	£1.7 million	£1.5 million	£1.3 million	£1.5 million	£1.6 million	6.6%
www.jersey.com - Total Unique Visitors <sup>4</sup>				1,417,800	1,602,000	13.0% <sup>4</sup>
www.jersey.com - Visitors who visited once - visitors identified by PC IP address and cookies, excluding any repeat visits	504,000	609,000	735,000	1,145,000	1,326,000	15.8%

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

<sup>2</sup> The Hospitality sector as defined by the Manpower Survey consists of tourism related accommodation, restaurants and bars. The figures are from the Manpower Survey, June 2007 (Statistics Unit, Policy and Resources Department). Again the hospitality sector alone does not constitute the full impact of tourism upon employment in Jersey.

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

<sup>4</sup> Total number of visitors identified by PC IP address and cookies, including repeats. Total Visitors stats were not calculated in this way pre 2006.

<sup>5</sup> % point/s refers to the change in percentage from one time period to another as opposed to a measurement of percentage change e.g. Average yearly bed space occupancy was 61% in 2006 and 62% in 2007 - this means that occupancy was 1% point higher in 2007 than it was in 2006.

For the full report and more detailed information, please visit

[www.jersey.com/marketinginfo](http://www.jersey.com/marketinginfo)

## Jersey Tourism 2007

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, Jersey Link Bookings, Internet Usage and Passenger Arrivals.

More detailed tables and information can be found in the appendices within the web-based version of this report at: [www.jersey.com/marketinginfo](http://www.jersey.com/marketinginfo) under "Annual Report - 2007".

### 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 Survey (see Section 9 – Guide to data sources).

Visitor Expenditure estimates refer to direct visitor spend whilst in Jersey and are based upon 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.

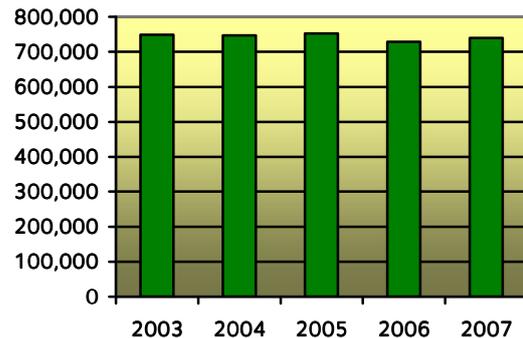
The following summary of 2007 results emphasises the importance and impact of tourism in Jersey.

- 739,300 Visitors.
- 375,900 Visitors staying in paid accommodation for leisure purposes.
- 78% of staying leisure visitors were from the UK representing 85% of total staying leisure visitor bed nights sold.
- 2.1 Million overnight stays (bed nights sold) in paid accommodation (excluding visiting yachts).
- £234 million estimated on-island spend.
- £122 million estimated visitor spend on accommodation.

#### 1.2 Total Visitor estimates

Figure 1 below shows that the number of visitors increased by 1.5% from 728,500 in 2006 to 739,300 in 2007; a reverse of 2006 vs. 2005 which saw a year on year decrease of 3.2%.

Figure 1 Total visitor volume 2003–2007

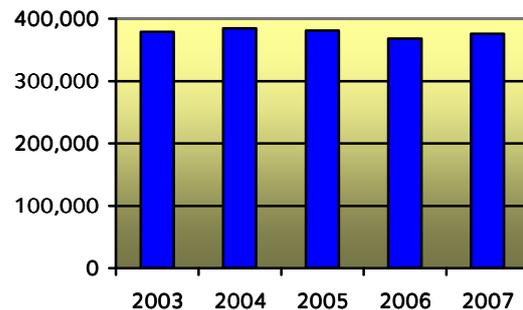


A full breakdown of total visitor numbers can be found in **Appendix 1** in the 2007 Annual Report at [www.jersey.com/marketinginfo](http://www.jersey.com/marketinginfo).

#### 1.3 Staying Leisure Visitors Estimates

Figure 2 below shows how total staying leisure visitor volume increased by 2.1% from 368,200 in 2006 to 375,900 in 2007.

Figure 2 Staying leisure visitor volume 2003–2007



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

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

The number of visitors staying with friends and relatives decreased by 9% from 90,100 in 2006 to 81,700 in 2007. In addition to this, 4% of leisure visitors staying in registered accommodation claimed a visit to friends and relatives was their main purpose of visit, with a further 6% claiming this to be a secondary purpose (Staying Leisure Visitor Survey 2006).

Based upon the 2007 Travel Survey it is estimated that 89% of the VFR market traveled to Jersey by air and the breakdown by country of residence is as follows:

Table 1 Visiting friends and relatives (VFR) volumes by market 2007

UK	64,650
France	5,120
Ireland	2,000
Other CI	1,500
USA	860
Poland	840
Australia	680
Spain	640
Portugal	540
Canada	490
Switzerland	460
Germany	370
Holland	310
Italy	260
Sweden	170
Norway	130
Other	2,670

Those staying with friends and relatives spend slightly longer in Jersey than visitors in paid accommodation, with an average length of stay in 2007 of 6 nights. The VFR market therefore accounted for 492,000 bed nights in Jersey in 2007.

## 1.5 Language Students

Visiting language student numbers decreased by 11% from 2,500 in 2006 to 2,200 in 2007.

Language students in 2007 are estimated to have stayed in Jersey for an average of 13 nights, with the total market accounting for 28,900 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 was estimated to have increased by 19% from 87,300 in 2006 to 104,000. In 2007 The number of staying (one or more nights) business visitors increased by 17% to 71,950, and business day visits increasing by 25% to 32,060.

The increase in staying business visitor volume, coupled with a slight increase in average stay accounted for 158,000 bed nights sold, 20% more than in 2006.

## 1.7 Visiting Conference Delegates

Residential conference delegate numbers increased by 10% from 8,800 in 2006 to 9,700 in 2007.

The number of conferences increased by 9% from 290 in 2006 to 310 in 2007. The number of Corporate delegates was 8,844 while the number of Association delegates was 848.

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

## 1.8 Visiting Yachtsman

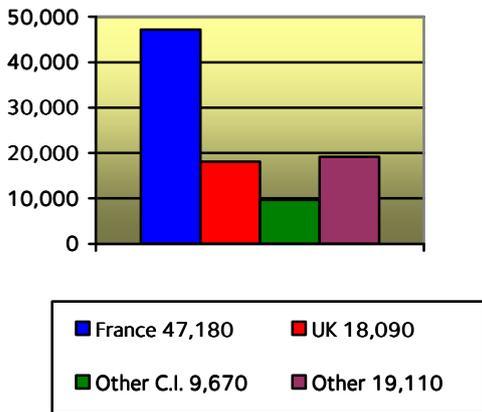
The number of visiting yachtsmen decreased by 13% from 24,000 in 2006 to 21,100 in 2007, staying an average of 2.4 nights, the same as in 2006.

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

### 1.9 Leisure Day Trips

Leisure day trip visits decreased by 7% from 100,900 in 2006 to 94,100 in 2007.

Figure 3 Breakdown of leisure day trip visitors by market



### 1.10 Visitor Expenditure Estimates

Total on-Island expenditure in 2007 is estimated at £234 million.

In real terms, if the total 2006 expenditure figures are reflatd to 2007 values, tourism expenditure in Jersey in 2007 increased by 2%.

Table 2 shows a breakdown of estimated on-Island visitor expenditure by visitor type 2007 vs. 2006.

Table 2 Total Spend 2007 vs. 2006

	2006 Value of Market 000's	2007 Value of Market 000's	% Change Value of Market
Staying Leisure Visitors	£154,938	£160,356	3%
Visiting friends/relatives	£19,753	£20,291	3%
Language students	£1,153	£1,531	33%
Leisure Daytrippers	£4,639	£4,505	-3%
Visiting yachtsmen	£2,278	£1,929	-15%
Business visitors	£19,703	£25,530	30%
Conference delegates	£5,030	£5,326	6%
Other visitors	£13,585	£14,569	7%
Total Spend	£221,079	£234,036	6%

N.B. 2006 figures are not reflatd.

Table 3 shows a breakdown of estimated on-Island visitor expenditure per visitor by visitor type 2007 vs. 2006.

Table 3 Spend per Visitor 2007 vs. 2006

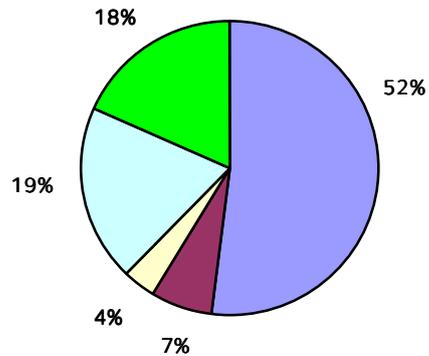
	2006 Spend per Visitor	2007 Spend per Visitor	% Change Value of Market
Staying Leisure Visitors	£421	£427	1%
Visiting friends/relatives	£219	£248	13%
Language students	£461	£687	49%
Leisure Daytrippers	£46	£48	4%
Visiting yachtsmen	£95	£92	-3%
Business visitors	£226	£245	8%
Conference delegates	£573	£550	-4%
Other visitors	£290	£288	-1%
Average Spend per Visitor	£303	£317	5%

N.b. 2006 figures are not reflatd.

### Breakdown of on-Island visitor spend 2007

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 4 Breakdown of on-Island visitor expenditure 2007 - £234m



The above shows that more than half (52%) 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.). 19% 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.

*A more detailed breakdown of visitor expenditure can be found in **Appendix 2** of the 2007 Annual Report on [www.jersey.com/marketinginfo](http://www.jersey.com/marketinginfo)*

## 1.11 Tax Revenue

The following figures show estimates of the tax contribution of companies in the hospitality sector for the years 1999 to 2006.

Table 4 Tax revenues from companies

	Companies
1999	£5.9m
2000	£5.2m
2001	£4.9m
2002	£5.0m
2003	£5.0m
2004	£5.9m
2005	£5.9m
2006	£5.3m

The hospitality sector represented 2.4% of total company tax returns in 2006.

Tax revenue from individuals who work in the hospitality sector are not included and tax revenue from individuals by sector are not published.

## 2. Profile of Staying Leisure Visitors

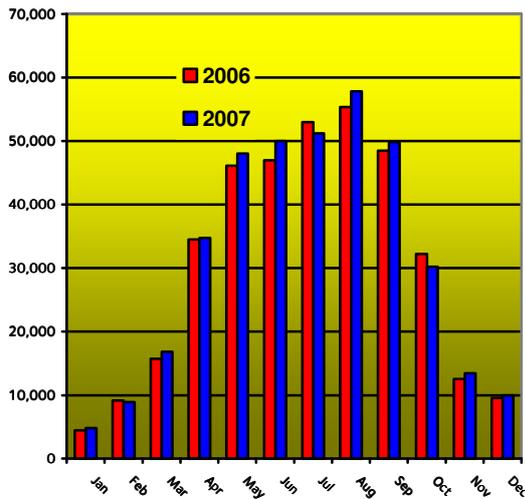
The following tables concentrate on **staying leisure visitor** trends, with the data derived from those visitors staying in registered accommodation that filled in visitor cards and stated that their main purpose of visit was “holiday” or “sport”.

### 2.1 Visitors by Month

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

Figure 5 shows that apart from February, July and October, all other months showed increased volumes of staying leisure visitors compared to the same month in 2006.

**Figure 5 Staying leisure visitor arrivals by month 2006 and 2007.**



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 5 Staying leisure visitors – 2007 party composition.**

	Adults (over 16)	Children (under 16)	Total Visitors
UK	272,950	22,100	295,060
Ireland	3,750	400	4,150
Other CI	13,880	1,430	15,310
France	29,400	3,990	33,400
Germany	9,230	410	9,640
Benelux	5,460	550	6,010
Other	11,760	540	12,300
<b>Total</b>	<b>346,440</b>	<b>29,420</b>	<b>375,860</b>

In 2007, children accounted for over 8% of total staying leisure visitors, the same percentage as in 2005 and 2006.

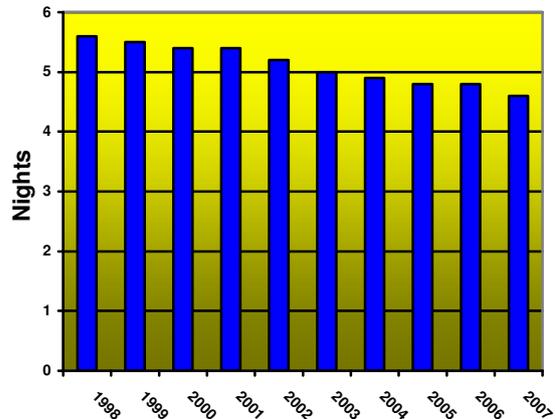
### 2.3 Average Length of Stay

Like the majority of destinations, Jersey has experienced a general consumer 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** of the 2007 Annual report on: [www.jersey.com/marketinginfo](http://www.jersey.com/marketinginfo)

The following graph illustrates the overall trend from 1998 to 2007.

**Figure 6 Staying leisure visitors – average stay 1998-2007**

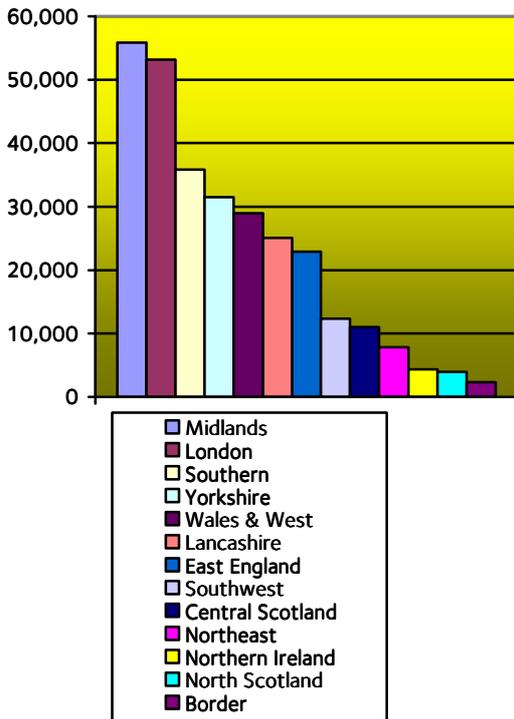


## 2.4 Region of Residence

### 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 7 Volumes of staying leisure visitors from the UK by ISBA region in 2007.



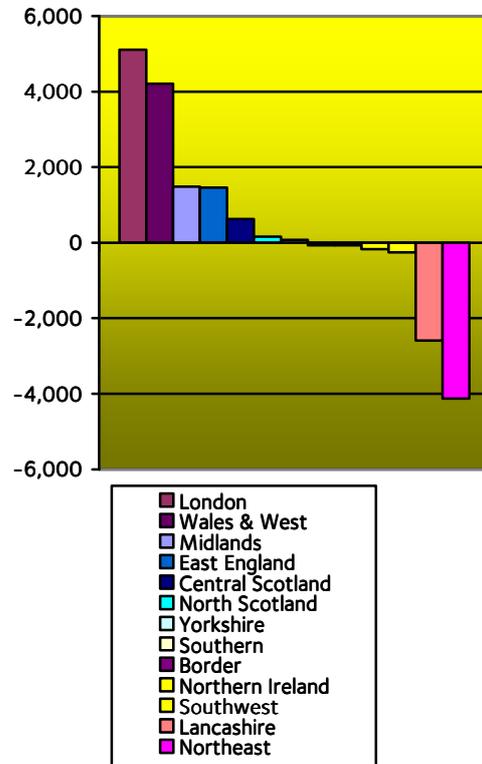
There have been some significant changes in the regional distribution of visitors by ISBA region between 2004 and 2007. These changes are partly reflective of the changes to capacity on certain routes and to some new routes being introduced, as well as being lost.

Table 6 and Figure 8 opposite show the changes in volumes of visitors by ISBA region between 2007 and 2006.

Table 6 Visitor volume changes 2007 vs. 2006

London	5,110
Wales & West	4,210
Midlands	1,480
East England	1,460
Central Scotland	630
North Scotland	160
Yorkshire	70
Southern	-70
Border	-70
Northern Ireland	-170
Southwest	-250
Lancashire	-2,600
Northeast	-4,120

Figure 8 Visitor volume changes 2007 vs. 2006



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

In 2007, 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** of the 2007 Annual Report on [www.jersey.com/marketinginfo](http://www.jersey.com/marketinginfo)

### 2.4.2 France

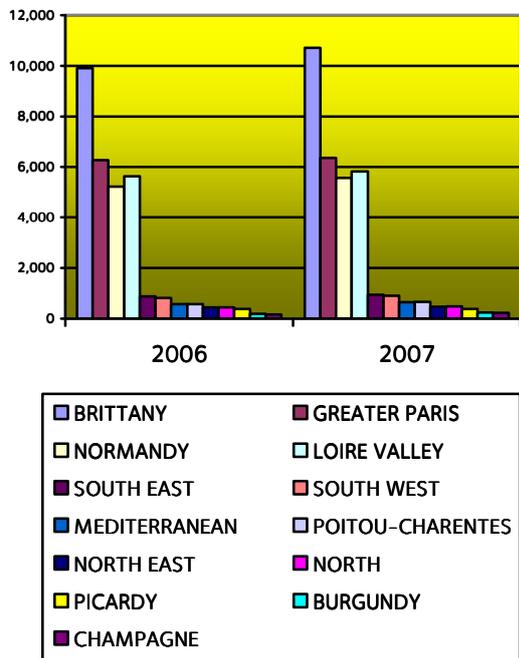
The first two digits of French postcodes from returned visitor registration cards have also been captured so that a continuous monitor of visitors from French Départements has been possible. Départements are grouped into French regions.

Table 7 and Figure 9 show the distribution of French staying leisure visitors between 2006 and 2007. There was an increase in visitors from all of the main staying leisure visitor generating regions.

Table 7 French visitors by region 2007 vs. 2006

	2006	2007	Change 07/06	Change 07/06
Brittany	9,910	10,710	8%	800
Greater Paris	6,260	6,350	1%	90
Normandy	5,220	5,560	7%	340
Loire Valley	5,630	5,810	3%	180
South East	880	940	7%	60
South West	820	910	11%	90
Other	2,750	3,120	14%	370
Total	31,470	33,400	6%	1,930

Figure 9 French visitors by region 2006 vs. 2007



For more detailed analysis of the French regional profiles, please refer to the **Appendix 4** of the 2007 Annual Report on [www.jersey.com/marketinginfo](http://www.jersey.com/marketinginfo)

### 2.5 ACORN Profile of UK Staying Leisure Visitors

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

The "A" group represent wealthier neighborhoods, going down to the "E" group which represent predominantly low income areas.

Table 8 Acorn groups of visitors 2003-2007

Acorn Group	2003	2004	2005	2006	2007
A	38.9%	39.1%	39.8%	40.0%	41.1%
B	8.7%	8.3%	8.0%	8.1%	9.0%
C	31.8%	32.1%	31.9%	32.6%	31.8%
D	10.6%	10.6%	10.2%	9.5%	8.7%
E	9.7%	9.6%	9.9%	9.6%	9.1%
Unclassified	0.3%	0.3%	0.3%	0.3%	0.3%

The overall proportion of visitors from the "A" group has seen a slight increase over the past few years, and represented over 40% of staying leisure visitors from the UK to Jersey in 2007.

For more detailed analysis of the Acorn profiles please refer to **Appendix 5** and for definitions of ACORN groups and broad classifications into socio-economic groupings **Appendix 20** in the 2007 Annual Report on [www.jersey.com/marketinginfo](http://www.jersey.com/marketinginfo)

## 2.6 Additional Visitor Profiling

The most notable points from the tables are that:

- In 2007 average length of stay fell from 4.8 nights in 2005 and 2006 to 4.6 nights in 2007. Average stay for UK visitors fell from 5.2 nights in 2006 to 4.9 nights in 2007.
- After several years of decline in the percentage of people booking their holiday through a tour operator, both 2006 and 2007 saw increases in the percentage choosing this method of booking. In 2007 53% of staying leisure visitors booked through a tour operator.
- After many years of decline, the percentage of first time visitors increased in 2004 to 44% and since then has remained at the 44-45% mark.
- In 2007 there was a significant increase in the proportion of visitors booking at shorter notice. 36% of visitors booked less than one month before arrival compared to 31% in 2006.
- Between 2002 and 2005 the percentage of staying leisure visitors travelling by air to Jersey consistently hovered around the 70-71% mark; but in 2006 this rose to 73% and remained at 73% in 2007.
- There had been a gradual increase in the average age or age profile of staying leisure visitors in previous years. This trend slowed in 2003 with the overall average adult age dropping to 52 years compared to 54 years in 2002. 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** in the 2007 Annual Report on [www.jersey.com/marketinginfo](http://www.jersey.com/marketinginfo)*

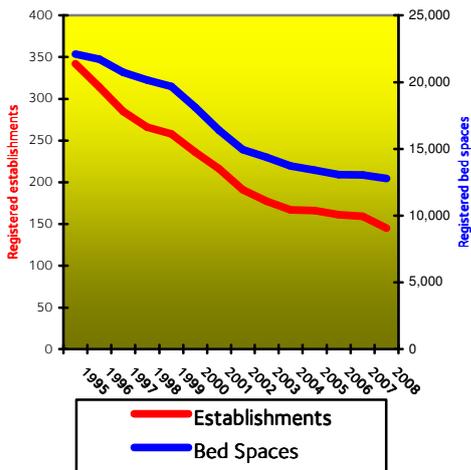
### 3. Registered Bed Stock

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 there are signs that the industry is willing and able to invest in the future. There have been a variety of investments both in new and existing establishments over the last few years, with more in the planning process for the future.

Figure 10 Registered establishments and bed spaces 1995 -2008



In 2007, Jersey had 159 registered establishments, representing over 13,000 tourist bed spaces. Hotels accounted for 75% of the total bed stock in 2007.

Figures 11 and 12 demonstrate that the largest fall in bed spaces has occurred in the hotel sector and that the largest fall in establishment numbers has been in the guest house sector. This has inevitably resulted in an increase in the average number of bed spaces per establishment from 64 in 1993 to 82 in 2007.

Figure 11 Distribution of bed spaces 1995-2008

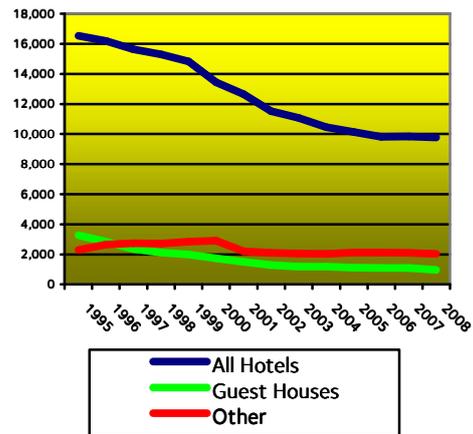
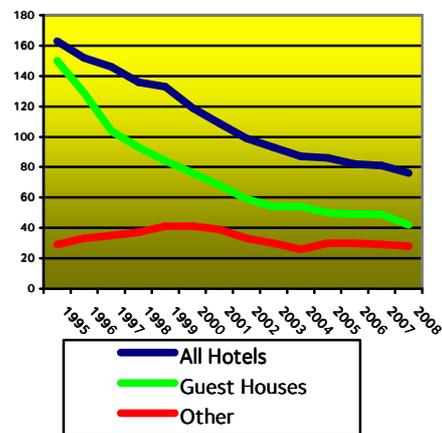


Figure 12 Distribution of establishments 1995-2008



More detailed data with regard to registered bed stock and establishments can be found in **Appendix 9** of the 2007 Annual Report on [www.jersey.com/marketinginfo](http://www.jersey.com/marketinginfo)

#### 4. Accommodation Performance Indicators

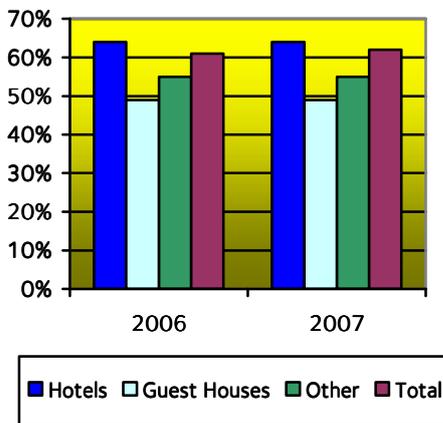
This section endeavours to measure the performance in terms of bed and room nights sold, and occupancy levels achieved in the accommodation sector.

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, Jersey Tourism has made the following estimates for total bed space occupancy 2007 vs. 2006.

Figure 13 Bed space occupancy 2007 vs.2006

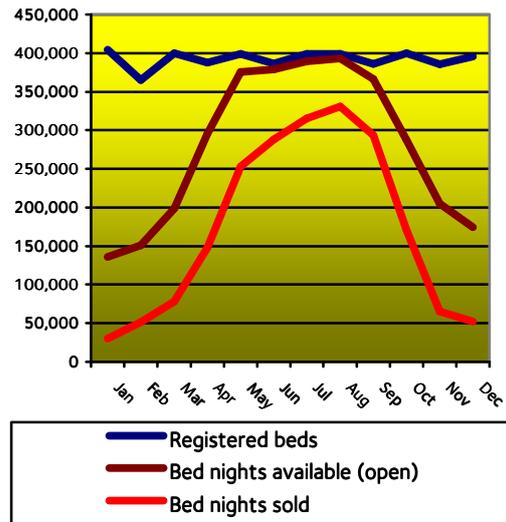


**In 2007, total bed space occupancy averaged 62%, compared to 61% in 2006.** Bed nights sold in all accommodation increased slightly to 2,076,000 and total bed night availability fell slightly to 3,350,000.

#### 4.1.1 Monthly Occupancy

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

Figure 14 Bed spaces - 2007

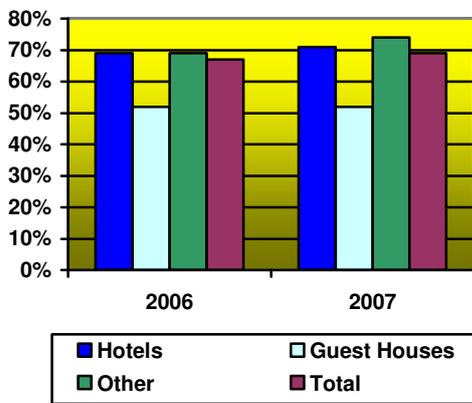


### 4.2 Room Occupancy

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, Jersey Tourism has made the following estimates for total room occupancy 2007 vs. 2006.

Figure 15 Room space occupancy 2007 vs. 2006



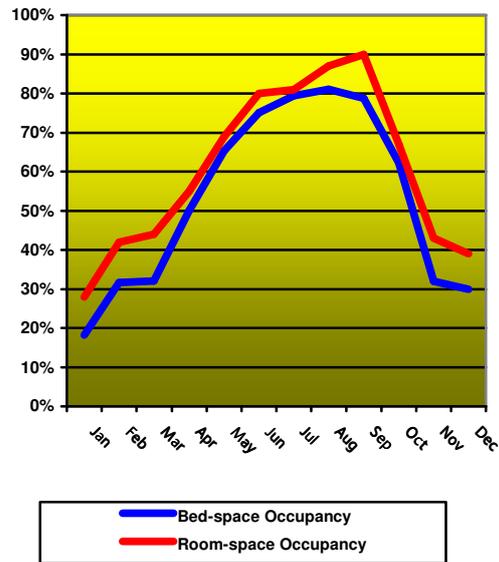
Between 2003 and 2005, room occupancy averaged 70%, but fell to 67% in 2006. **In 2007 total room occupancy was 70%.** Rooms sold in all accommodation increased slightly to 1,027,000 while total rooms available fell slightly to 1,481,000.

*For more detailed data with regard to **bed and room space occupancy** please refer to **Appendices 10 and 11** of the 2007 Annual Report on [www.jersey.com/marketinginfo](http://www.jersey.com/marketinginfo)*

### 4.3 Room vs. Bed Occupancy

Figure 16 shows how room occupancy is approximately between five and ten percentage points 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 sales compared to staying leisure visitors.

Figure 16 Bed and room occupancy 2007



### 5.1 Jersey Link Bookings

Jersey Link is a computerised accommodation central reservations system set up by Jersey Tourism to enable industry partners to sell any spare room capacity they might have.

In 2007, 117 establishments, managing over 10,000 bed spaces, or 89% of the total registered bed stock, had computer access to the system.

**Table 9 Jersey Link bookings 2007 vs. 2006**

Number of bookings	2006	2007	07 vs. 06
Hotels	3,575	3,332	-7%
Guest Accommodation	2,239	2,467	10%
Self Catering	121	148	22%
Camping	4	13	225%
<b>TOTAL</b>	<b>5,939</b>	<b>5,960</b>	<b>0%</b>

Number of visitors	2006	2007	07 vs. 06
Hotels	7,549	7,110	-6%
Guest/Acc	4,775	5,215	9%
S/C	341	429	26%
Camping	10	48	380%
<b>TOTAL</b>	<b>12,675</b>	<b>12,802</b>	<b>1%</b>

Number of bednights	2006	2007	07 vs. 06
Hotels	24,795	22,798	-8%
Guest/Acc	14,869	16,506	11%
S/C	2,230	2,542	14%
Camping	26	221	750%
<b>TOTAL</b>	<b>41,920</b>	<b>42,067</b>	<b>0%</b>

Revenue	2006	2007	07 vs. 06
Hotels	£991,813	£973,418	-2%
Guest/Acc	£395,675	£489,390	24%
S/C	£50,626	£66,777	32%
Camping	£402	£2,726	578%
<b>TOTAL</b>	<b>£1,438,516</b>	<b>£1,532,311</b>	<b>7%</b>

The above tables show similar levels in bookings and number of bednights, a 1% increase in people and an 7% increase in revenue. Revenue in 2007 increased 7% to £1,532,311 compared to 2006, producing an average per person per night rate of £36.40, an increase on 2006 of £2.13. Average party size remained at 2.1 people, and average stay remained at 3.3 nights in 2007. Average length of stay is significantly less for Jersey Link bookings than the overall staying leisure visitor average of 4.6 nights.

Jersey Link bookings accounted for over 2% of total bed nights sold in 2007, a similar level to that achieved in 2006.

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

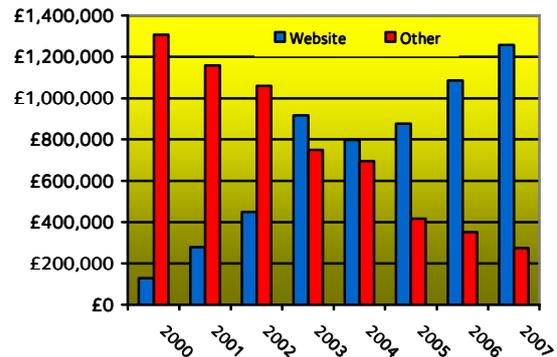
### 5.2 Jersey Link Bookings on the Internet

As in 2005 and 2006, 2007 saw a notable increase in the proportion of bookings and their value made on the Internet.

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

The average revenue per internet booking was £276 compared to £196 for other bookings made through Jersey Link. This further highlights the importance of the internet.

**Figure 17 Jersey Link Bookings Revenue 2000 – 2007**



More detailed data can be found in **Appendices 12 and 13** of the 2007 Annual Report on [www.jersey.com/marketinginfo](http://www.jersey.com/marketinginfo)

## 6. Internet Usage

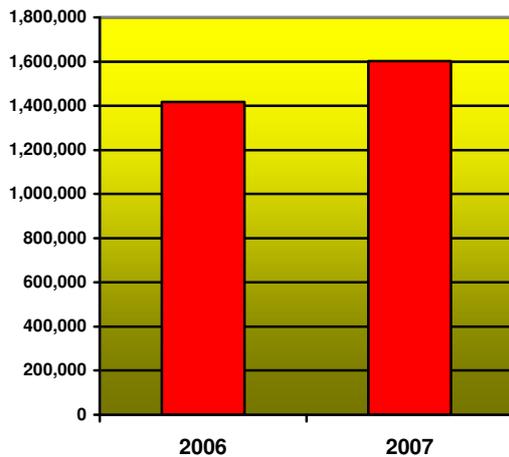
The internet has become a very successful tool in enhancing the way people plan and book their holidays and it will continue to rapidly change the structure of the travel trade as more consumers get access to this channel of communication.

### 6.1 www.jersey.com

Jersey Tourism has its own website, [www.jersey.com](http://www.jersey.com), which went live in March 1999. A new version of the site will be launched in early 2008.

In 2007, there were over 1.6 million **"Total Unique Visitors"** (visitors identified by PC IP address and cookies, excluding any repeat visits) to the site compared 1.4 million in 2006, an increase of 13%.

Figure 19 "Total Unique Visitors" 2006-2007  
[www.jersey.com](http://www.jersey.com)



More detailed data can be found in **Appendix 14** of the 2007 Annual Report on [www.jersey.com/marketinginfo](http://www.jersey.com/marketinginfo)

### 6.2 Internet usage by Jersey visitors

Table 10 Internet usage by Jersey staying leisure visitors, 2000 - 2006

	Have internet access and have used for holiday info.		
	2000	2004	2006
UK	32%	51%	64%
Ireland	41%	67%	
Guernsey	38%	75%	
France	33%	72%	84%
Germany	39%	66%	77%
Netherlands	45%	81%	
Belgium	49%	67%	
Switzerland	54%	73%	
	Have internet access but have not used for holiday info.		
	2000	2004	2006
UK	15%	6%	4%
Ireland	18%	7%	
Guernsey	21%	2%	
France	14%	6%	3%
Germany	13%	6%	5%
Netherlands	21%	6%	
Belgium	12%	6%	
Switzerland	12%	6%	
	No internet access. Never used for holiday info.		
	2000	2004	2006
UK	53%	43%	32%
Ireland	41%	26%	
Guernsey	41%	23%	
France	53%	22%	13%
Germany	48%	28%	18%
Netherlands	34%	13%	
Belgium	39%	27%	
Switzerland	34%	21%	

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

NB. The survey is being repeated in 2008.

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

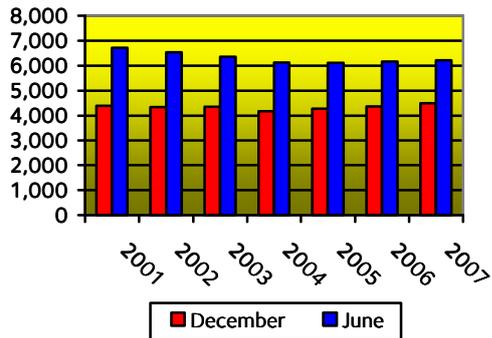
## 7. Employment in the Hospitality Sector

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

### Manpower Returns

Figure 20 below shows the number of employees in the hospitality sector between 2001 and 2007. From 2001 to 2004 the underlying trend in employment had been downward, but the rate of decline slowed, and in both 2006 and 2007 increased slightly.

**Figure 20 Total staff employed in the hospitality sector 2001 - 2007**



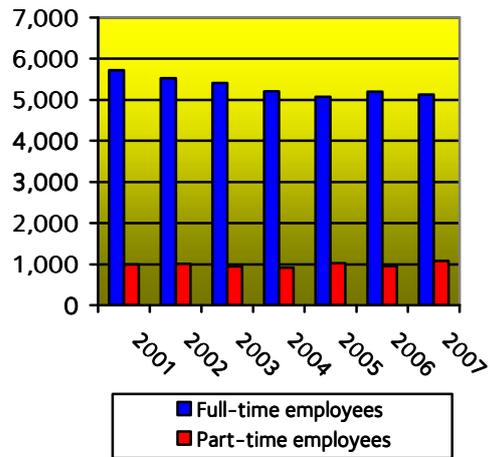
The difference between the number of staff employed in June 2007 and December 2006, some 1,850, would indicate the seasonal nature of tourism employment. The equivalent figure in 2006 was 1,870. These figures would appear to reflect the decrease in the rate of fall in the number of tourism establishments and beds.

Measured against staff employed in all sectors, the percentage attributable to the hospitality sector has fallen from 17% in June 1997 to 14% in June 2007. The total number of staff employed in the hospitality sector increased by 50 between June 2006 and June 2007. The last three years have seen a steadying in the numbers of staff employed since numbers began to fall in 1990's and compares to a decrease of 260 staff employed between June 2004 and June 2003.

Figure 21 below shows how the decline in hospitality sector employment was in full-time employment rather than in part-time employment. In 2006 this trend changed with an increase in full-time employment to 5,200, but fell back slightly to 5,130 in 2007.

In 2001 full-time employees accounted for 85% of all those employed in hotels, restaurants and bars, compared to 83% in 2007.

**Figure 21 Full-time vs. part-time posts (June) 2001 - 2007**



Source: Statistics Unit, Policy and Resources Department

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

## 8. Passenger Arrivals

In 2007, passenger arrivals through Jersey's airport and harbour terminals increased by just over 50,000 (+4.5%) compared to 2006 to a total of 1,165,000.

Figure 22 details a breakdown of arrivals by air and sea against the total for each year. 2007 saw an increase in arrivals by air of 4.3% (+32,300), and an increase in arrivals by sea of 4.9% (+17,700).

**Figure 22 Total passenger arrivals 2001 – 2007**

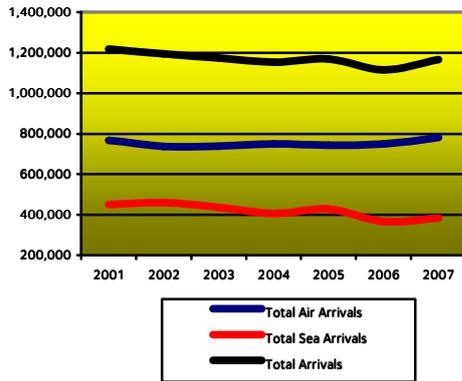
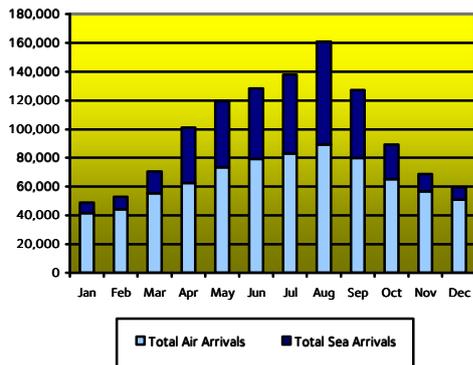


Figure 23 shows arrivals by month during 2007. The pattern of higher arrivals during the summer months reflects the seasonality of the "tourist" season.

**Figure 23 Total air & sea arrivals by month for 2007.**

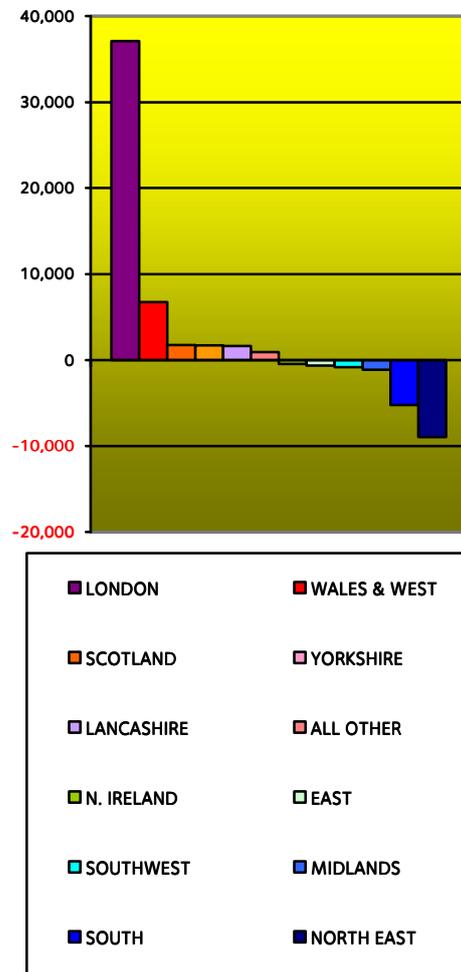


As in recent years, 2007 again saw some significant changes in arrivals patterns.

There was also a significant change in arrivals by air from the UK by region. The re-introduction of the Heathrow service and increased services on the Luton route led to an increase in arrivals from London airports of 37,000 despite falls in passenger arrivals from Gatwick and Stansted.

Figure 24 illustrates the impact of operators in 2007 vs. 2006 by region.

**Figure 24 Changes in arrivals by region 2007 vs. 2006**



For more detailed arrivals data please refer to **Appendices 15 to 18** in the 2007 Annual Report on [www.jersey.com/marketinginfo](http://www.jersey.com/marketinginfo)

## 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 the Jersey Harbours Department. 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 and 2007 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 2007 to measure visitor volume in order to update data gathered from the most recent previous survey undertaken in 2005. Similar in methodology to the UK International Passenger Survey and many other exit surveys carried out internationally, throughout 2007, over 100,000 departing passengers, representing 8.8% 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 Survey 2006

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

### Employment figures

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

### Registered bed stock

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

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

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

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

### Other Sources used within the 2007 Annual Report.

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

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

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

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

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

## 10. Appendices

2007 Jersey Tourism Annual Report Appendices on [www.jersey.com/marketinginfo](http://www.jersey.com/marketinginfo)

### Section 1 – Tourism Volume and Expenditure Estimates

Appendix 1 – Visitor Volumes 1992 –2007

Appendix 2 – Breakdown of on-Island visitor expenditure estimates by source market for 2006 and 2007

### Section 2 – Profile of Staying Leisure Visitors

Appendix 3 – UK staying leisure visitors by ISBA region 2003-2007

Appendix 4 – French staying leisure visitors by region 2003-2007

Appendix 5 – Acorn profile of UK staying leisure visitors 2003-2007

Appendix 6 – Length of stay – Profile by market 2003-2007

Appendix 7 – Percentage of visitors using tour operators – Profile by market 2003-2007

Appendix 7 – Percentage of first time visitors – Profile by market 2003-2007

Appendix 7 – When booked – Profile by market 2003-2007

Appendix 7 – Percentage travelling by air – Profile by market 2003-2007

Appendix 8 – Age groups and average age – Profile by market 2003-2007

### Section 3 – Registered Bed Stock

Appendix 9 – Accommodation establishments and bed spaces registered by category 1992-2008

### Section 3 – Accommodation Performance Indicators

Appendix 10 – Bed space occupancy 2007 vs. 2006

Appendix 11 – Room space occupancy 2007 vs. 2006

### Section 5 – Jersey Link Bookings

Appendix 12 – Jersey Link data 2003-2007

Appendix 13 – Jersey Link charts 2001-2007

### Section 6 – Internet Usage

Appendix 14.1 – Unique visitors 2006-2007

Appendix 14.2 – Average time spent on site 2001-2007

### Section 8 – Passenger Arrivals

Appendix 15 – Total passenger arrivals 2000-2007

Appendix 16 – Passenger arrivals from the UK 2000-2007

Appendix 17 – Inter-Island passenger arrivals 2000-2007

Appendix 18 – Continental passenger arrivals 2000-2007

### Other Appendices

Appendix 19 – Exchange rate comparisons against sterling 1997-2007

Appendix 20 – Acorn definitions

Appendix 21 – Weather statistics

Appendix 22 – Example of a Visitor Registration Card



## Appendix 2

## BREAKDOWN OF ON-ISLAND VISITOR EXPENDITURE ESTIMATES BY SOURCE MARKET FOR 2006 AND 2007

	2006		2007		2007 vs. 2006	
	Spend per Visitor	Value of Market £000's	Spend per Visitor	Value of Market £000's	% Change Spend per Visitor	% Change Value of Market
<b>Staying Holiday/Leisure Visitors</b>						
UK	£450	£130,091	£455	£134,182	1%	3%
Ireland	£570	£2,845	£537	£2,235	-6%	-21%
Other C.I.	£303	£4,619	£259	£3,975	-14%	-14%
France	£176	£5,522	£216	£7,212	23%	31%
Germany	£480	£5,128	£497	£4,794	4%	-7%
Benelux	£392	£2,358	£414	£2,491	6%	6%
Other	£414	£4,375	£445	£5,467	7%	25%
<b>Staying Leisure Total <sup>1</sup></b>	<b>£421</b>	<b>£154,938</b>	<b>£427</b>	<b>£160,356</b>	<b>1%</b>	<b>3%</b>
<b>Visiting friends/relatives <sup>1</sup></b>	<b>£219</b>	<b>£19,753</b>	<b>£248</b>	<b>£20,291</b>	<b>13%</b>	<b>3%</b>
<b>Language students <sup>2</sup></b>	<b>£461</b>	<b>£1,153</b>	<b>£687</b>	<b>£1,531</b>	<b>49%</b>	<b>33%</b>
Daytrippers - French	£42	£2,303	£47	£2,202	12%	-4%
Daytrippers - UK	£41	£820	£39	£706	-4%	-14%
Daytrippers - Other C.I.	£106	£1,122	£94	£911	-11%	-19%
Daytrippers - Other	£27	£394	£36	£686	33%	74%
<b>Daytrippers - Total <sup>1</sup></b>	<b>£46</b>	<b>£4,639</b>	<b>£48</b>	<b>£4,504</b>	<b>4%</b>	<b>-3%</b>
<b>Visiting yachtsmen <sup>3</sup></b>	£95	£2,278	£92	£1,929	-3%	-15%
Business - Day visitors	£44	£1,143	£58	£1,859	31%	63%
Business - Staying visitors	£301	£18,560	£329	£23,671	9%	28%
<b>Business visitors - Total <sup>1</sup></b>	<b>£226</b>	<b>£19,703</b>	<b>£245</b>	<b>£25,530</b>	<b>9%</b>	<b>30%</b>
Conference - Association	£407	£1,349	£351	£298	-14%	-78%
Conference - Corporate	£673	£3,681	£569	£5,027	-16%	37%
<b>Conference delegates - Total <sup>4</sup></b>	<b>£573</b>	<b>£5,030</b>	<b>£550</b>	<b>£5,326</b>	<b>-4%</b>	<b>6%</b>
Other - Day visitors	£39	£500	£74	£1,164	88%	133%
Other - Staying visitors	£384	£13,084	£384	£13,405	0%	2%
<b>Other visitors - Total <sup>1</sup></b>	<b>£290</b>	<b>£13,585</b>	<b>£288</b>	<b>£14,569</b>	<b>-1%</b>	<b>7%</b>
<b>Total Visitors</b>	<b>£303</b>	<b>£221,079</b>	<b>£317</b>	<b>£234,036</b>	<b>4%</b>	<b>6%</b>

<sup>1</sup> Expenditure is calculated by using results from the 2007 Jersey Travel Survey.

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

<sup>3</sup> Expenditure is calculated by using results from the 2007 Visiting Yachts Survey.

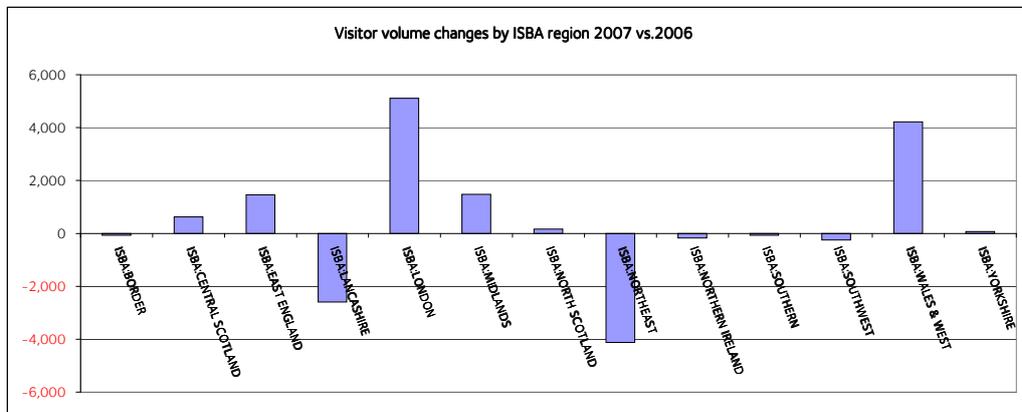
<sup>4</sup> Expenditure is calculated by using results from the 2007 Jersey Travel Survey and research into conference delegate rates.

N.B. 2006 figures are at 2006 prices.

Appendix 3 UK Staying Leisure Visitors by ISBA Region 2003 - 2007

REGION	UK Households	2003	Market	2004	Market	2005	Market	2006	Market	2007	Market	% Change	Vol. Change	2007
			Share	07/06	07/06	Index								
ISBA:BORDER	1.2%	2,960	1%	2,761	1%	2,500	1%	2,400	1%	2,330	1%	-2.9%	-70	0.66
ISBA:CENTRAL SCOTLAND	6.3%	12,940	4%	10,737	4%	10,770	4%	10,353	4%	10,980	4%	6.1%	627	0.59
ISBA:EAST ENGLAND	6.7%	20,320	7%	20,553	7%	22,330	7%	21,459	7%	22,920	8%	6.8%	1,461	1.16
ISBA:LANCASHIRE	11.6%	26,010	9%	29,449	10%	28,800	10%	27,676	10%	25,080	9%	-9.4%	-2,596	0.73
ISBA:LONDON	19.4%	60,540	20%	57,057	19%	50,040	17%	48,094	17%	53,200	18%	10.6%	5,106	0.93
ISBA:MIDLANDS	15.4%	48,240	16%	57,671	19%	56,570	19%	54,370	19%	55,850	19%	2.7%	1,480	1.23
ISBA:NORTH SCOTLAND	2.1%	4,200	1%	3,988	1%	3,910	1%	3,760	1%	3,920	1%	4.3%	160	0.63
ISBA:NORTHEAST	5.1%	8,980	3%	9,510	3%	12,430	4%	11,944	4%	7,820	3%	-34.5%	-4,124	0.52
ISBA:NORTHERN IRELAND	2.4%	6,380	2%	4,908	2%	4,690	2%	4,512	2%	4,340	1%	-3.8%	-172	0.61
ISBA:SOUTHERN	9.2%	44,940	15%	41,413	14%	37,340	12%	35,890	12%	35,820	12%	-0.2%	-70	1.32
ISBA:SOUTHWEST	3.0%	12,370	4%	13,497	4%	13,060	4%	12,551	4%	12,300	4%	-2.0%	-251	1.39
ISBA:WALES & WEST	7.7%	31,330	10%	29,142	10%	25,760	9%	24,756	9%	28,970	10%	17.0%	4,214	1.28
ISBA:YORKSHIRE	9.9%	23,200	8%	25,768	8%	32,710	11%	31,436	11%	31,510	11%	0.2%	74	1.08
TOTAL		302,420		306,760		300,900		289,200		295,040		2.0%	5,840	

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 2003-2007

	<u>2003</u>	<u>% market share</u>	<u>2004</u>	<u>% market share</u>	<u>2005</u>	<u>% market share</u>	<u>2006</u>	<u>% market share</u>	<u>2007</u>	<u>% market share</u>	<u>Change 07/06</u>	<u>Average 2003-2007</u>
BRITTANY	8,980	31%	9,310	31%	10,660	34%	9,910	32%	10,710	32%	8%	9,910
GREATER PARIS	7,120	24%	6,480	22%	6,590	21%	6,260	20%	6,350	19%	1%	6,560
NORMANDY	3,100	11%	4,310	14%	4,390	14%	5,220	17%	5,560	17%	7%	4,520
LOIRE VALLEY	5,380	18%	5,210	17%	5,650	18%	5,630	18%	5,810	17%	3%	5,540
SOUTH EAST	930	3%	950	3%	940	3%	880	3%	940	3%	7%	930
SOUTH WEST	860	3%	900	3%	940	3%	820	3%	910	3%	11%	890
MEDITERRANEAN	590	2%	640	2%	630	2%	570	2%	650	2%	14%	620
POITOU-CHARENTES	660	2%	490	2%	630	2%	570	2%	660	2%	16%	600
NORTH EAST	370	1%	460	2%	630	2%	440	1%	470	1%	7%	470
NORTH	470	2%	480	2%	630	2%	440	1%	490	1%	11%	500
PICARDY	380	1%	290	1%	310	1%	380	1%	380	1%	0%	350
BURGUNDY	250	1%	200	1%	160	1%	190	1%	240	1%	26%	210
CHAMPAGNE	200	1%	230	1%	160	1%	160	1%	230	1%	44%	200
<b>TOTAL</b>	<b>29,300</b>		<b>29,960</b>		<b>31,370</b>		<b>31,450</b>		<b>33,400</b>		<b>6%</b>	<b>31,300</b>

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

## Appendix 5

## ACORN profile of UK Staying Leisure Visitors 2003 - 2007

Acorn Group	UK Population	2003	2004	2005	2006	2007	Index 2007
A 1 1	1.7%	3.2%	3.2%	3.0%	3.8%	4.5%	2.6
A 1 2	1.5%	2.0%	2.0%	1.9%	2.5%	3.3%	2.2
A 1 3	2.7%	5.1%	5.2%	5.3%	4.5%	3.9%	1.4
A 1 4	2.6%	4.5%	4.6%	4.5%	4.4%	4.1%	1.6
A 2 5	1.8%	3.2%	3.1%	3.3%	3.4%	3.9%	2.2
A 2 6	2.0%	2.2%	2.3%	2.4%	2.2%	2.4%	1.2
A 2 7	1.9%	3.2%	3.2%	3.3%	3.5%	3.2%	1.7
A 2 8	2.0%	3.3%	3.3%	3.5%	3.6%	3.8%	1.9
A 3 9	2.1%	3.3%	3.1%	3.0%	2.9%	3.3%	1.6
A 3 10	2.3%	3.1%	3.1%	3.2%	3.2%	3.4%	1.5
A 3 11	3.7%	5.8%	6.1%	6.3%	5.8%	5.3%	1.4
A 3 12	0.6%	0.1%	0.1%	0.1%	0.2%	0.1%	0.2
B 4 13	0.9%	0.8%	0.8%	0.8%	0.8%	0.9%	0.9
B 4 14	1.4%	2.1%	2.0%	1.9%	1.8%	1.8%	1.3
B 5 15	1.1%	0.9%	0.8%	0.8%	0.9%	1.1%	1.0
B 5 16	0.9%	0.7%	0.7%	0.7%	0.7%	1.0%	1.1
B 5 17	0.6%	0.3%	0.3%	0.3%	0.3%	0.4%	0.6
B 5 18	1.1%	0.6%	0.5%	0.5%	0.5%	0.6%	0.6
B 5 19	0.9%	1.0%	1.0%	1.0%	1.1%	1.5%	1.7
B 6 20	0.6%	0.4%	0.4%	0.3%	0.3%	0.3%	0.5
B 6 21	1.6%	0.8%	0.7%	0.6%	0.6%	0.6%	0.4
B 6 22	1.2%	0.9%	0.9%	0.9%	0.9%	0.8%	0.6
B 6 23	0.4%	0.1%	0.1%	0.1%	0.1%	0.1%	0.3
C 7 24	1.0%	1.0%	0.9%	0.9%	0.9%	0.9%	0.9
C 7 25	1.4%	1.3%	1.3%	1.2%	1.6%	2.2%	1.6
C 8 26	1.9%	2.3%	2.1%	2.1%	2.6%	2.7%	1.4
C 8 27	2.9%	4.8%	5.0%	4.8%	4.3%	3.3%	1.1
C 8 28	2.6%	2.3%	2.4%	2.4%	2.5%	2.4%	0.9
C 8 29	3.3%	4.4%	4.4%	4.3%	4.2%	4.3%	1.3
C 8 30	3.6%	3.5%	3.7%	3.7%	3.8%	3.7%	1.0
C 8 31	1.1%	0.6%	0.6%	0.5%	0.4%	0.5%	0.4
C 9 32	0.9%	1.5%	1.4%	1.5%	1.6%	1.8%	2.0
C 9 33	3.0%	4.3%	4.5%	4.5%	4.6%	4.2%	1.4
C 9 34	2.1%	2.4%	2.5%	2.7%	2.6%	2.5%	1.2
C 10 35	0.7%	0.8%	0.9%	0.9%	0.9%	1.0%	1.4
C 10 36	1.9%	2.6%	2.6%	2.4%	2.5%	2.2%	1.2
D 11 37	0.5%	0.0%	0.0%	0.0%	0.1%	0.0%	0.1
D 11 38	1.1%	0.2%	0.2%	0.1%	0.1%	0.1%	0.1
D 12 39	2.8%	3.1%	2.9%	2.7%	2.5%	2.5%	0.9
D 12 40	2.1%	1.2%	1.1%	1.1%	1.1%	1.0%	0.5
D 13 41	3.3%	3.5%	3.7%	3.5%	3.2%	2.2%	0.7
D 13 42	2.8%	1.6%	1.6%	1.6%	1.5%	1.8%	0.6
D 13 43	1.8%	1.0%	1.0%	1.1%	1.0%	1.0%	0.6
E 14 44	3.3%	1.9%	2.1%	2.0%	2.1%	1.9%	0.6
E 14 45	3.0%	2.0%	1.9%	2.0%	1.9%	1.8%	0.6
E 14 46	1.4%	0.7%	0.7%	0.6%	0.6%	0.5%	0.4
E 14 47	2.6%	1.1%	1.1%	1.1%	1.1%	0.9%	0.3
E 14 48	2.1%	0.5%	0.5%	0.6%	0.6%	0.5%	0.2
E 14 49	1.7%	0.3%	0.4%	0.4%	0.3%	0.4%	0.2
E 15 50	1.8%	1.0%	1.0%	1.1%	1.1%	1.0%	0.5
E 15 51	1.9%	0.5%	0.5%	0.6%	0.6%	0.5%	0.3
E 15 52	0.8%	0.3%	0.2%	0.2%	0.2%	0.3%	0.4
E 16 53	0.8%	0.4%	0.4%	0.4%	0.4%	0.4%	0.5
E 16 54	0.9%	0.3%	0.3%	0.3%	0.3%	0.3%	0.3
E 17 55	1.1%	0.4%	0.3%	0.3%	0.3%	0.3%	0.3
E 17 56	1.1%	0.3%	0.2%	0.2%	0.2%	0.2%	0.2

ACORN is a geodemographic profiling system based upon UK postcodes. See appendix 20. ACORN DEFINITIONS.

This table shows the geo-demographic profile of visitors to Jersey between 2003 and 2007. The higher the index figure (this is the proportion of Jersey visitors compared to the UK population for each Acorn Group), the more likely Jersey is to attract visitors from a particular ACORN group.

Appendix 6 Length of Stay and Average Stay – Profile of Staying Leisure Visitors 2003 – 2007

COUNTRY	Stay																					Average Stay								
	1 – 3 Nights							4 – 6 Nights							7 Nights							8+ Nights				Nights				
	2003	2004	2005	2006	2007	2003	2004	2005	2006	2007	2003	2004	2005	2006	2007	2003	2004	2005	2006	2007	2003	2004	2005	2006	2007	2003	2004	2005	2006	2007
UK	31%	33%	33%	34%	36%	21%	22%	24%	26%	26%	38%	36%	35%	32%	30%	9%	9%	8%	8%	8%	9%	9%	8%	8%	8%	5.4	5.3	5.2	5.2	4.9
IRELAND	29%	29%	31%	29%	30%	25%	25%	28%	28%	26%	39%	39%	33%	35%	37%	8%	8%	8%	7%	7%	8%	8%	8%	7%	7%	5.3	5.4	5.2	5.1	5.2
OTHER CI	91%	93%	93%	94%	92%	6%	5%	5%	5%	7%	2%	1%	1%	1%	2%	1%	1%	1%	0%	0%	1%	1%	1%	0%	0%	1.9	1.9	1.8	2.0	1.9
FRANCE	90%	90%	90%	89%	89%	7%	8%	7%	8%	8%	2%	1%	2%	2%	2%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	2.1	2.1	2.0	2.1	2.1
GERMANY	29%	25%	25%	21%	21%	19%	25%	23%	25%	27%	31%	32%	34%	36%	35%	20%	18%	18%	18%	17%	20%	18%	18%	18%	17%	6.2	6.1	6.1	6.3	6.1
NORWAY	21%	19%	39%	31%	34%	19%	22%	21%	43%	44%	46%	48%	22%	12%	10%	14%	11%	18%	13%	12%	14%	11%	18%	13%	12%	6.3	6.1	5.1	5.0	4.7
SWEDEN	45%	29%	27%	25%	25%	29%	59%	59%	66%	62%	16%	7%	9%	7%	9%	10%	5%	4%	3%	4%	10%	5%	4%	3%	4%	4.6	4.0	4.1	4.1	4.1
HOLLAND	31%	33%	29%	31%	34%	30%	27%	25%	28%	28%	30%	30%	35%	30%	29%	30%	30%	35%	30%	29%	10%	10%	12%	11%	10%	5.2	5.1	5.5	5.1	5.1
BELGIUM	49%	51%	48%	44%	57%	25%	27%	31%	36%	27%	21%	17%	16%	12%	10%	5%	5%	5%	8%	6%	5%	5%	5%	8%	6%	4.0	3.9	4.0	4.0	3.7
SWITZERLAND	50%	43%	41%	36%	41%	23%	25%	30%	29%	23%	16%	22%	22%	25%	26%	12%	10%	7%	10%	9%	12%	10%	7%	10%	9%	4.5	4.8	4.7	5.1	4.8
FINLAND	44%	70%	40%	80%	47%	31%	19%	39%	15%	27%	6%	2%	8%	2%	9%	19%	9%	12%	3%	16%	19%	9%	12%	3%	16%	4.5	3.7	4.6	3.4	4.5
DENMARK	37%	42%	36%	22%	45%	37%	41%	39%	29%	16%	10%	8%	16%	40%	31%	15%	10%	8%	9%	8%	15%	10%	8%	9%	8%	4.9	4.3	4.6	5.5	4.7
AUSTRIA	34%	52%	33%	53%	45%	25%	17%	26%	24%	32%	18%	17%	18%	12%	17%	23%	14%	23%	11%	7%	23%	14%	23%	11%	7%	5.5	4.6	5.9	4.7	4.5
SPAIN	56%	60%	52%	49%	60%	25%	23%	29%	33%	25%	9%	7%	8%	9%	5%	11%	10%	11%	9%	10%	11%	10%	11%	9%	10%	4.2	3.9	4.1	4.2	4.0
PORTUGAL	47%	43%	55%	47%	57%	29%	31%	17%	18%	13%	16%	13%	18%	22%	16%	7%	13%	10%	13%	14%	7%	13%	10%	13%	14%	4.3	5.0	4.9	4.5	4.4
ITALY	60%	54%	60%	55%	48%	26%	32%	19%	28%	32%	9%	6%	13%	7%	9%	5%	7%	7%	10%	11%	5%	7%	7%	10%	11%	3.5	3.7	3.7	4.1	4.2
CANADA	39%	38%	36%	41%	46%	26%	32%	37%	36%	27%	14%	15%	11%	13%	10%	22%	15%	17%	10%	17%	22%	15%	17%	10%	17%	5.5	5.3	5.2	5.0	5.1
USA	62%	61%	63%	59%	60%	27%	23%	24%	26%	28%	7%	11%	8%	8%	7%	4%	4%	6%	7%	5%	4%	4%	6%	7%	5%	3.5	3.5	3.5	3.9	3.5
AUSTRALIA	59%	55%	56%	56%	61%	20%	30%	30%	29%	26%	13%	8%	9%	9%	8%	7%	7%	5%	5%	5%	7%	7%	5%	5%	5%	4.1	3.9	3.7	4.2	3.6
OTHER	60%	55%	57%	51%	56%	24%	27%	25%	26%	24%	9%	10%	11%	12%	10%	7%	7%	7%	1%	10%	7%	7%	7%	1%	10%	3.8	3.8	5.9	4.6	4.1
TOTAL	38%	40%	40%	43%	45%	20%	21%	22%	23%	23%	33%	32%	30%	27%	26%	9%	8%	8%	7%	7%	9%	8%	8%	7%	7%	5.0	4.9	4.8	4.8	4.6

Percentages are derived from all those completing relevant sections of Visitor Registration Cards.  
Percentages may not add up to 100% due to rounding.



Appendix 8

Age Groups and Average Age - Profile of Staying Leisure Visitors 2003 - 2007

COUNTRY	Age Groups (years)																		Average Adult Age																										
	16-24		25-29		30-34		35-44		45-54		55-64		65-74		75+		Years																												
	2003	2004	2005	2006	2007	2003	2004	2005	2006	2007	2003	2004	2005	2006	2007	2003	2004	2005	2006	2007	2003	2004	2005	2006	2007																				
UK	3%	3%	3%	3%	4%	6%	5%	5%	4%	4%	17%	16%	15%	15%	13%	23%	23%	23%	23%	24%	18%	19%	20%	20%	19%	9%	10%	11%	11%	11%	54	55	55	56	55										
IRELAND	14%	8%	7%	4%	6%	9%	10%	9%	9%	8%	17%	19%	18%	20%	18%	21%	20%	20%	22%	21%	11%	11%	11%	12%	14%	3%	4%	5%	4%	5%	46	47	48	49	49										
OTHER CI	16%	18%	17%	16%	17%	11%	11%	11%	12%	12%	12%	12%	12%	12%	12%	18%	17%	17%	18%	18%	11%	11%	11%	12%	13%	5%	6%	6%	6%	6%	2%	2%	2%	2%	2%	40	41	41	41	42					
FRANCE	5%	6%	6%	6%	6%	3%	6%	6%	6%	6%	11%	10%	10%	9%	9%	25%	25%	26%	26%	26%	16%	16%	18%	18%	20%	9%	8%	8%	8%	8%	4%	4%	3%	3%	3%	47	46	46	47	47					
GERMANY	2%	2%	1%	2%	2%	3%	2%	2%	2%	3%	7%	6%	5%	4%	3%	19%	17%	19%	19%	19%	22%	23%	23%	23%	23%	18%	23%	20%	20%	21%	7%	6%	6%	6%	5%	53	55	54	54	53					
NORWAY	6%	4%	2%	4%	5%	6%	4%	8%	2%	1%	7%	7%	9%	4%	1%	13%	15%	23%	9%	15%	26%	23%	21%	27%	23%	21%	28%	25%	34%	32%	14%	16%	9%	13%	19%	7%	4%	3%	5%	3%	51	51	47	54	54
SWEDEN	8%	3%	4%	2%	3%	3%	4%	4%	3%	4%	5%	3%	3%	5%	4%	13%	16%	10%	12%	9%	33%	32%	28%	18%	28%	27%	22%	26%	30%	35%	9%	10%	12%	23%	12%	1%	11%	11%	8%	5%	48	53	54	56	53
HOLLAND	3%	4%	3%	2%	2%	6%	6%	4%	3%	4%	11%	9%	10%	7%	4%	24%	26%	23%	23%	19%	25%	24%	26%	30%	32%	21%	21%	21%	24%	24%	7%	6%	9%	9%	10%	3%	3%	3%	2%	6%	47	47	49	50	51
BELGIUM	5%	3%	3%	3%	5%	6%	4%	6%	4%	4%	8%	7%	9%	7%	4%	20%	19%	25%	17%	20%	25%	26%	27%	29%	29%	17%	19%	21%	21%	21%	13%	15%	9%	15%	12%	6%	6%	4%	5%	4%	49	52	48	52	49
SWITZERLAND	4%	2%	3%	2%	3%	5%	7%	3%	7%	7%	9%	13%	9%	7%	7%	21%	19%	21%	18%	27%	19%	22%	20%	24%	21%	22%	20%	23%	23%	20%	13%	12%	13%	14%	11%	7%	5%	6%	4%	4%	51	50	51	51	48
FINLAND	10%	4%	0%	4%	3%	10%	4%	4%	3%	1%	19%	11%	14%	10%	1%	17%	4%	28%	20%	33%	19%	20%	33%	31%	21%	24%	12%	16%	22%	28%	0%	4%	5%	6%	11%	0%	0%	0%	2%	2%	40	43	46	47	48
DENMARK	4%	3%	3%	3%	5%	12%	6%	7%	3%	1%	7%	4%	7%	5%	1%	13%	14%	12%	9%	8%	26%	32%	31%	28%	39%	26%	29%	26%	30%	24%	8%	10%	11%	15%	14%	6%	3%	4%	8%	7%	49	51	50	54	56
AUSTRALIA	2%	1%	2%	2%	3%	4%	5%	4%	5%	2%	13%	9%	2%	5%	2%	25%	23%	17%	18%	19%	19%	26%	35%	27%	24%	24%	231%	16%	24%	26%	9%	12%	20%	14%	20%	5%	3%	5%	4%	4%	48	49	53	51	53
SPAIN	2%	2%	3%	4%	7%	3%	3%	6%	8%	8%	9%	6%	8%	10%	8%	18%	18%	25%	19%	26%	24%	27%	16%	17%	15%	25%	19%	20%	22%	17%	11%	18%	12%	17%	12%	8%	8%	8%	3%	7%	51	53	50	49	47
PORTUGAL	22%	13%	20%	7%	10%	13%	16%	8%	19%	19%	18%	17%	14%	16%	1%	17%	18%	12%	14%	13%	5%	6%	8%	14%	11%	6%	5%	4%	0%	7%	2%	6%	3%	14%	0%	37	42	40	41	39					
ITALY	4%	6%	4%	4%	10%	11%	8%	7%	10%	9%	12%	10%	8%	10%	9%	23%	23%	22%	32%	24%	21%	38%	19%	26%	17%	15%	11%	16%	13%	18%	12%	3%	22%	4%	12%	2%	0%	3%	1%	1%	46	42	49	44	46
CANADA	4%	4%	3%	3%	5%	5%	4%	1%	1%	2%	2%	2%	2%	1%	2%	9%	9%	3%	9%	8%	14%	14%	20%	9%	13%	27%	25%	32%	27%	24%	22%	26%	23%	31%	22%	18%	17%	17%	18%	26%	59	60	60	62	61
USA	3%	1%	5%	4%	0%	4%	2%	2%	4%	4%	7%	5%	3%	7%	4%	16%	8%	9%	11%	12%	21%	22%	22%	24%	16%	23%	23%	30%	28%	32%	17%	26%	17%	21%	21%	8%	13%	13%	6%	11%	53	58	56	53	57
AUSTRALIA	7%	3%	4%	4%	4%	9%	5%	6%	4%	5%	4%	6%	2%	5%	5%	13%	10%	10%	12%	9%	17%	16%	19%	19%	17%	26%	32%	29%	32%	38%	17%	23%	22%	20%	18%	6%	6%	8%	5%	5%	50	55	55	54	54
OTHER	12%	14%	16%	14%	13%	9%	15%	10%	12%	13%	10%	8%	8%	8%	8%	18%	17%	14%	16%	16%	21%	19%	19%	16%	16%	16%	15%	16%	16%	14%	11%	8%	11%	13%	10%	3%	4%	6%	4%	4%	45	43	45	45	44
TOTAL	4%	4%	4%	4%	4%	4%	4%	4%	4%	4%	7%	6%	6%	5%	4%	18%	18%	17%	16%	16%	21%	21%	21%	21%	21%	21%	22%	22%	23%	23%	16%	17%	17%	18%	17%	8%	9%	9%	10%	10%	52	53	53	54	53

Percentages are derived from all those completing relevant sections of Visitor Registration Cards. Percentages may not add up to 100% due to rounding.

**Appendix 9**  
**Accommodation Establishments by Category 1992 – 2008**

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

**Accommodation Bed Spaces by Category 1992 – 2008**

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

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 2006 and 2007

	2006	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Year
<b>Hotel bed nights available</b>		146,600	151,200	207,500	290,300	381,500	388,100	400,200	399,000	368,600	301,100	193,700	168,000	<b>3,395,800</b>
<b>Guest House bed nights available</b>		26,800	48,200	67,100	146,500	250,900	293,700	320,100	325,800	292,600	188,500	62,500	51,200	<b>2,074,000</b>
<b>Total bed occupancy</b>		<b>18%</b>	<b>32%</b>	<b>32%</b>	<b>50%</b>	<b>66%</b>	<b>76%</b>	<b>80%</b>	<b>82%</b>	<b>79%</b>	<b>63%</b>	<b>32%</b>	<b>30%</b>	<b>61%</b>
<b>Hotel bed nights sold</b>		117,300	123,300	166,000	235,500	297,000	289,300	297,500	295,400	285,900	246,100	159,500	134,900	<b>2,647,600</b>
<b>Guest House bed nights sold</b>		8,900	10,500	16,200	28,200	32,100	33,000	34,100	34,000	32,500	27,900	13,200	11,300	<b>282,000</b>
<b>Unserviced bed nights available</b>		20,400	17,400	25,400	26,500	52,500	65,700	68,600	69,600	50,200	27,100	21,000	21,800	<b>466,200</b>
<b>Hotel bed nights sold</b>		22,400	41,900	59,800	129,100	202,800	229,700	238,900	247,500	243,400	162,300	57,200	46,600	<b>1,681,600</b>
<b>Guest House bed nights sold</b>		1,500	2,200	3,500	10,600	16,700	20,000	22,200	23,900	21,400	10,400	2,600	2,200	<b>137,200</b>
<b>Unserviced bed nights sold</b>		2,900	4,100	3,900	6,700	31,400	44,000	59,000	54,400	27,900	15,800	2,700	2,300	<b>255,200</b>
<b>Hotel bed space occupancy</b>		19%	34%	36%	55%	68%	79%	80%	84%	85%	66%	36%	35%	<b>64%</b>
<b>Guest House bed space occupancy</b>		17%	21%	21%	38%	52%	61%	65%	70%	66%	37%	19%	20%	<b>49%</b>
<b>Unserviced bed space occupancy</b>		14%	24%	15%	25%	60%	67%	86%	78%	56%	58%	13%	11%	<b>55%</b>
		<b>2007</b>	<b>Jan</b>	<b>Feb</b>	<b>Mar</b>	<b>Apr</b>	<b>May</b>	<b>Jun</b>	<b>Jul</b>	<b>Aug</b>	<b>Oct</b>	<b>Nov</b>	<b>Dec</b>	<b>Year</b>
<b>Hotel bed nights available</b>		135,600	151,200	198,800	295,300	375,800	378,900	389,500	393,300	366,400	287,100	205,100	174,400	<b>3,351,300</b>
<b>Guest House bed nights available</b>		30,300	51,200	78,200	148,300	252,900	288,000	315,300	331,100	293,300	170,900	65,000	52,100	<b>2,076,400</b>
<b>Total bed occupancy</b>		<b>22%</b>	<b>34%</b>	<b>39%</b>	<b>50%</b>	<b>67%</b>	<b>76%</b>	<b>81%</b>	<b>84%</b>	<b>80%</b>	<b>60%</b>	<b>32%</b>	<b>30%</b>	<b>62%</b>
<b>Hotel bed nights sold</b>		113,500	119,900	153,400	243,700	284,900	279,000	292,200	295,200	283,800	237,100	175,900	150,000	<b>2,628,600</b>
<b>Guest House bed nights sold</b>		9,900	12,700	22,600	27,300	29,300	29,600	31,000	30,700	27,100	22,900	11,700	8,300	<b>263,000</b>
<b>Unserviced bed nights available</b>		12,200	18,600	22,800	24,300	61,600	70,300	66,300	67,400	55,500	27,200	17,400	16,100	<b>459,600</b>
<b>Hotel bed nights sold</b>		27,100	44,000	69,200	133,600	206,400	227,800	235,000	253,500	244,700	143,900	59,500	47,900	<b>1,692,600</b>
<b>Guest House bed nights sold</b>		1,900	2,800	4,800	9,200	16,100	19,000	21,900	21,900	18,800	8,600	2,400	1,700	<b>128,900</b>
<b>Other bed nights sold</b>		1,300	4,400	4,100	5,500	30,300	41,200	58,400	55,800	29,800	18,400	3,000	2,500	<b>254,900</b>
<b>Hotel bed space occupancy</b>		24%	37%	45%	55%	72%	82%	80%	86%	86%	61%	34%	32%	<b>64%</b>
<b>Guest House bed space occupancy</b>		19%	22%	21%	34%	55%	64%	71%	71%	69%	38%	20%	20%	<b>49%</b>
<b>Other bed space occupancy</b>		11%	24%	18%	22%	49%	59%	88%	83%	54%	68%	17%	15%	<b>55%</b>



## Appendix 12

## Jersey Link - Jersey Tourism Central Reservations

	BOOKINGS			No. of People	No. of Bednights	Value of Bookings	Value per Bednight	
	VSC	Web	Total					
2003	January	164	133	297	606	1,750	£59,100	£33.77
	February	152	271	423	923	2,862	£93,123	£32.54
	March	201	358	559	1,212	4,055	£130,700	£32.23
	April	265	458	723	1,612	5,541	£176,227	£31.80
	May	365	509	874	1,844	6,261	£222,729	£35.57
	June	470	497	967	2,034	7,147	£250,200	£35.01
	July	657	511	1,168	2,538	8,791	£308,617	£35.11
	August	807	357	1,164	2,594	7,645	£257,467	£33.68
	September	488	272	760	1,544	4,356	£133,603	£30.67
	October	208	147	355	702	1,651	£44,454	£26.93
	November	86	96	182	325	762	£23,014	£30.20
	December	63	46	109	208	447	£14,977	£33.51
<b>Total</b>	<b>3,926</b>	<b>3,655</b>	<b>7,581</b>	<b>16,142</b>	<b>51,268</b>	<b>£1,714,211</b>	<b>£33.44</b>	
2004	January	87	206	293	614	1,951	£60,645	£31.08
	February	133	247	380	827	2,679	£87,034	£32.49
	March	174	404	578	1,308	4,198	£130,668	£31.13
	April	308	351	659	1,503	4,403	£141,064	£32.04
	May	324	366	690	1,495	4,865	£172,991	£35.56
	June	471	380	851	1,806	5,730	£203,055	£35.44
	July	589	361	950	2,134	6,788	£247,048	£36.39
	August	709	323	1,032	2,296	7,087	£246,616	£34.80
	September	613	202	815	1,544	4,212	£132,930	£31.56
	October	215	129	344	678	1,721	£49,913	£29.00
	November	96	96	192	330	910	£26,821	£29.47
	December	58	65	123	213	609	£19,501	£32.02
<b>Total</b>	<b>3,777</b>	<b>3,130</b>	<b>6,907</b>	<b>14,748</b>	<b>45,153</b>	<b>£1,518,286</b>	<b>£33.63</b>	
2005	January	68	197	265	561	2,141	£70,597	£32.97
	February	86	219	305	706	2,471	£75,335	£30.49
	March	102	308	410	918	3,241	£95,040	£29.32
	April	174	330	504	1,118	3,823	£121,193	£31.70
	May	252	286	538	1,142	3,608	£124,012	£34.37
	June	300	345	645	1,375	4,654	£172,990	£37.17
	July	327	358	685	1,484	4,955	£173,981	£35.11
	August	378	486	864	1,855	5,772	£209,483	£36.29
	September	364	374	738	1,417	4,259	£133,385	£31.32
	October	135	267	402	839	2,147	£61,758	£28.76
	November	58	177	235	446	1,161	£34,789	£29.96
	December	45	140	185	394	1,144	£34,290	£29.97
<b>Total</b>	<b>2,289</b>	<b>3,487</b>	<b>5,776</b>	<b>12,255</b>	<b>39,376</b>	<b>£1,306,853</b>	<b>£33.19</b>	
2006	January	51	354	405	908	3,317	£103,264	£31.13
	February	54	368	422	961	3,707	£114,409	£30.86
	March	119	468	587	1,321	4,641	£149,230	£32.15
	April	153	402	555	1,267	3,992	£135,845	£34.03
	May	181	441	622	1,364	4,743	£168,505	£35.53
	June	207	446	653	1,328	4,443	£164,434	£37.01
	July	286	507	793	1,712	5,964	£227,139	£38.09
	August	320	401	721	1,559	4,739	£173,301	£36.57
	September	231	250	481	928	2,724	£93,229	£34.23
	October	101	234	335	664	1,937	£55,955	£28.89
	November	75	167	242	442	1,257	£39,108	£31.11
	December	34	127	161	327	1,138	£35,412	£31.12
<b>Total</b>	<b>1,812</b>	<b>4,165</b>	<b>5,977</b>	<b>12,781</b>	<b>42,602</b>	<b>£1,459,831</b>	<b>£34.27</b>	
2007	January	51	369	420	967	3,392	£112,960	£33.30
	February	77	413	490	1,111	4,291	£144,525	£33.68
	March	81	515	596	1,332	4,718	£169,210	£35.86
	April	124	470	594	1,327	4,233	£150,781	£35.62
	May	165	610	775	1,648	5,428	£200,064	£36.86
	June	190	531	721	1,510	4,923	£194,736	£39.56
	July	190	520	710	1,561	5,104	£210,947	£41.33
	August	209	472	681	1,428	4,539	£177,337	£39.07
	September	194	305	499	956	2,806	£98,957	£35.27
	October	76	209	285	609	1,769	£49,130	£27.77
	November	44	121	165	333	957	£30,162	£31.52
	December	13	68	81	173	575	£16,845	£29.30
<b>Total</b>	<b>1,414</b>	<b>4,603</b>	<b>6,017</b>	<b>12,955</b>	<b>42,735</b>	<b>£1,555,654</b>	<b>£36.40</b>	
<b>2007 vs. 2006</b>	<b>-22%</b>	<b>11%</b>	<b>1%</b>	<b>1%</b>	<b>0%</b>	<b>7%</b>	<b>6%</b>	

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.

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

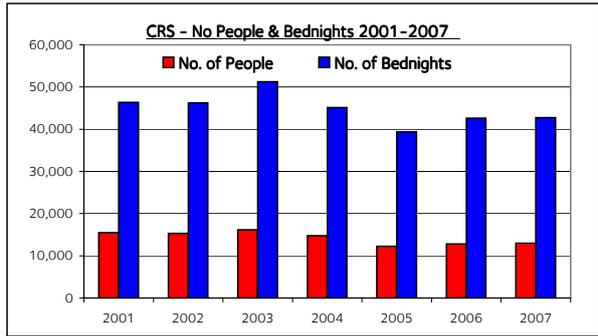
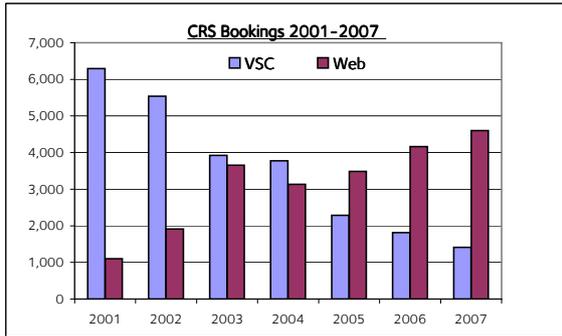
To receive notification of updated or new information, please visit and register at [www.jersey.com/marketinginfo](http://www.jersey.com/marketinginfo)

Appendix 13

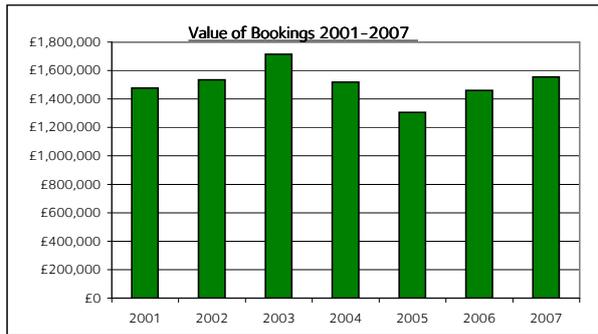
JerseyLink - Jersey Tourism Central Reservations

	BOOKINGS		
	VSC	Web	Total
2001	6,294	1,102	7,396
2002	5,538	1,912	7,450
2003	3,926	3,655	7,581
2004	3,777	3,130	6,907
2005	2,289	3,487	5,776
2006	1,812	4,165	5,977
2007	1,414	4,603	6,017

No. of People	No. of Bednights	Value of Bookings	Value per Bednight
15,487	46,346	£1,476,600	£31.86
15,308	46,228	£1,534,316	£33.19
16,142	51,268	£1,714,211	£33.44
14,748	45,153	£1,518,286	£33.63
12,255	39,376	£1,306,853	£33.19
12,781	42,602	£1,459,831	£34.27
12,955	42,735	£1,555,654	£36.40



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

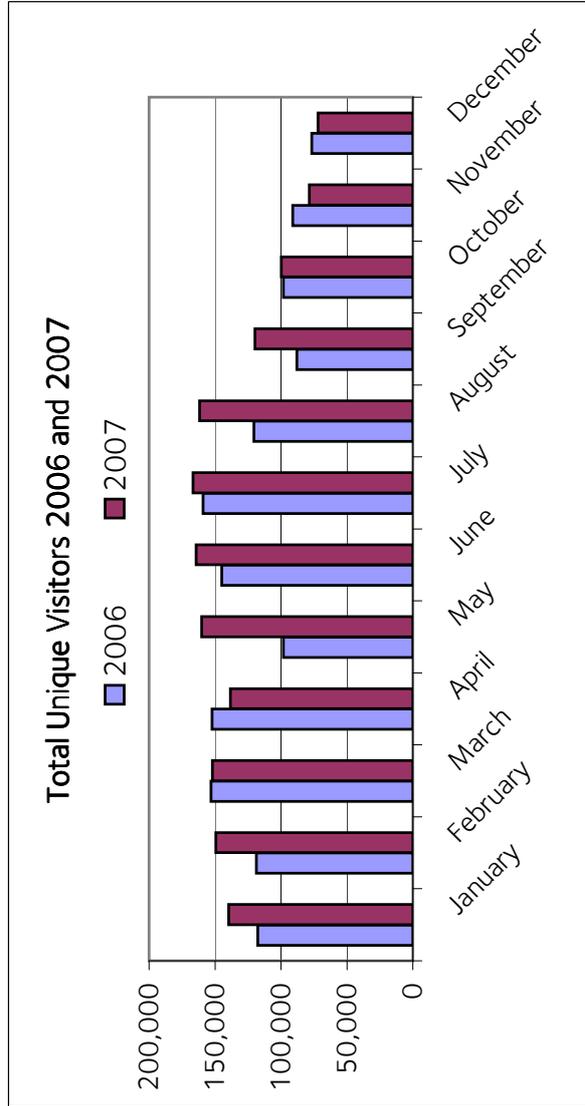


To receive notification of updated or new information, please visit and register at [www.jersey.com/marketinginfo](http://www.jersey.com/marketinginfo)

## Appendix 14.1

Total Unique Visitors - \*the total number of visitors identified by PC IP address and cookies, including repeats

	2006	2007
January	117,513	139,622
February	118,594	149,429
March	152,984	152,074
April	152,106	138,373
May	98,235	160,220
June	144,946	164,197
July	158,955	166,667
August	120,474	161,594
September	87,949	119,620
October	98,165	99,690
November	91,094	78,548
December	76,767	72,010
<b>Total</b>	<b>1,417,782</b>	<b>1,602,044</b>



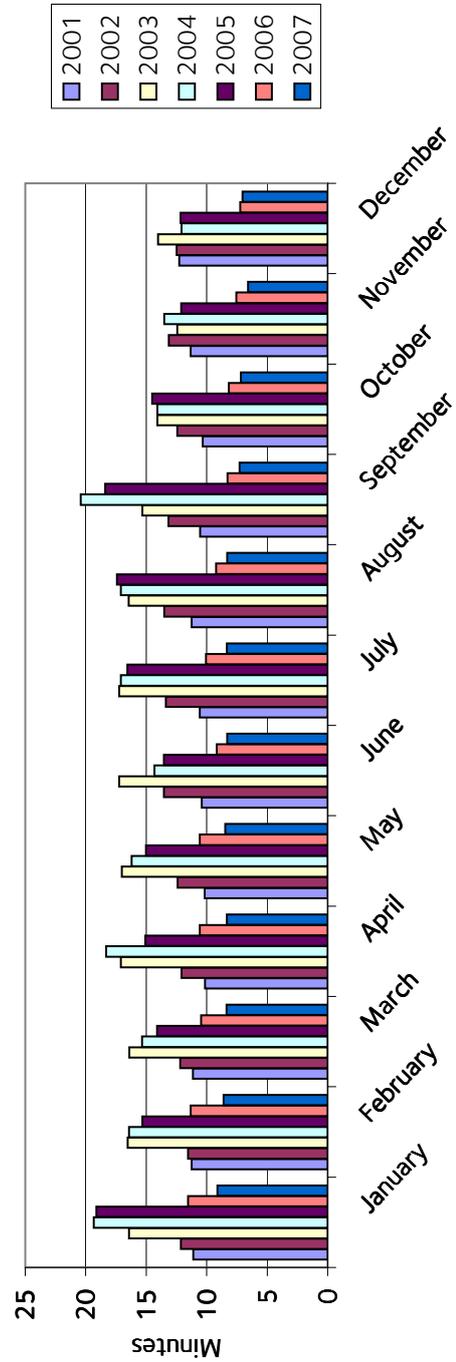
\*Total Visitors stats were not calculated in this way pre 2006

Appendix 14.2

Average Time Time Spent on Site

	2001	2002	2003	2004	2005	2006	2007
January	11.10	12.14	16.42	19.35	19.12	11.55	9.11
February	11.24	11.54	16.52	16.42	15.32	11.33	8.59
March	11.13	12.19	16.39	15.34	14.11	10.46	8.36
April	10.14	12.09	17.11	18.30	15.08	10.57	8.33
May	10.18	12.40	17.02	16.21	15.03	10.57	8.46
June	10.42	13.53	17.23	14.31	13.53	9.18	8.31
July	10.58	13.38	17.22	17.09	16.57	10.06	8.32
August	11.25	13.52	16.44	17.09	17.43	9.21	8.31
September	10.55	13.17	15.31	20.41	18.38	8.29	7.27
October	10.33	12.43	14.09	14.09	14.51	8.17	7.17
November	11.34	13.13	12.44	13.52	12.10	7.54	6.58
December	12.28	12.49	14.02	12.07	12.15	7.24	7.05
<b>Total</b>	<b>10.88</b>	<b>12.67</b>	<b>15.85</b>	<b>16.18</b>	<b>15.28</b>	<b>9.51</b>	<b>7.99</b>

Average Time Spent on Site 2001 - 2007



Appendix 15  
Total Passenger Arrivals 2000 - 2007

	TOTAL AIR ARRIVALS												TOTAL SEA ARRIVALS												TOTAL ARRIVALS											
	2000	2001	2002	2003	2004	2005	2006	2007	2000	2001	2002	2003	2004	2005	2006	2007	2000	2001	2002	2003	2004	2005	2006	2007												
JAN	41,030	39,980	38,160	37,920	36,984	38,482	38,803	41,646	4,760	5,110	6,970	6,830	5,324	6,768	7,022	7,345	45,790	45,090	45,130	44,750	42,308	45,250	45,825	48,991												
FEB	41,160	41,230	40,840	40,300	41,884	40,486	41,593	44,208	6,710	9,070	8,200	8,670	9,657	11,609	8,731	8,655	47,870	50,300	49,050	49,170	51,541	52,095	50,324	52,863												
MAR	54,400	50,860	51,730	51,310	51,014	52,667	52,633	55,439	15,220	13,090	17,890	15,460	11,597	18,616	11,516	15,192	69,630	63,940	69,620	66,770	62,611	71,283	64,149	70,631												
APR	69,870	66,870	58,230	65,320	63,609	57,454	62,498	62,562	43,160	40,260	35,840	42,930	39,630	34,738	35,542	38,785	113,040	107,130	94,070	108,250	103,239	92,192	98,040	101,347												
MAY	83,230	76,640	71,890	74,660	74,147	74,492	73,530	73,530	50,890	53,380	52,380	53,020	47,856	48,451	40,182	45,887	134,120	130,020	124,270	127,680	122,003	122,943	109,603	119,417												
JUN	83,870	84,460	81,190	75,300	76,232	75,268	76,736	79,165	62,540	63,760	68,440	57,970	55,019	56,220	47,822	49,305	146,410	148,220	149,640	133,260	131,251	131,488	124,558	128,470												
JUL	101,700	88,110	79,800	82,060	85,930	84,766	84,076	83,093	67,930	66,260	70,440	62,650	63,816	63,384	54,421	54,952	169,630	154,370	150,240	144,710	149,746	148,150	138,497	138,045												
AUG	99,370	90,890	87,650	89,050	84,852	83,871	82,740	89,233	86,600	91,780	90,640	84,020	74,035	83,258	66,818	71,686	185,970	182,670	178,290	173,070	158,887	167,129	149,558	160,919												
SEP	88,390	81,780	73,030	71,940	76,518	76,000	76,835	79,933	52,830	58,130	58,510	52,770	50,047	53,852	48,779	47,327	141,220	139,900	131,540	124,720	126,565	129,852	125,614	127,260												
OCT	64,870	57,350	60,160	58,350	66,041	62,342	63,127	65,238	22,980	24,770	26,440	32,140	24,658	28,974	23,206	23,983	87,850	82,120	86,600	90,490	90,699	91,316	86,333	89,231												
NOV	49,610	47,930	48,580	46,650	46,618	49,812	52,628	56,720	7,380	11,970	11,580	10,010	11,870	11,315	11,017	11,928	56,990	59,900	60,160	56,660	58,488	61,127	63,645	68,648												
DEC	43,890	41,990	44,060	44,540	45,302	46,285	48,269	50,886	8,420	12,630	12,270	9,190	11,442	10,278	10,882	8,637	52,310	54,620	56,330	53,730	56,744	56,563	59,151	59,523												
SUMMER	201,080	179,000	167,450	171,120	170,782	168,637	166,816	172,326	154,530	158,040	161,080	146,660	137,851	146,642	121,239	126,638	355,610	337,040	328,530	317,780	308,633	315,279	286,055	298,964												
SPRING	236,970	227,980	211,320	215,270	213,988	207,214	208,655	215,257	156,600	157,390	156,660	153,920	142,505	138,409	123,546	133,977	393,570	385,370	367,970	369,190	356,493	346,623	332,201	349,234												
AUTUMN	153,260	139,120	133,190	130,300	142,559	138,342	139,962	145,171	75,810	82,900	84,950	84,910	74,705	82,826	71,985	71,320	225,070	222,020	218,140	215,210	217,264	221,168	211,947	216,491												
WINTER	230,090	221,980	223,380	220,720	221,802	227,732	233,926	248,899	42,490	51,870	56,910	50,360	49,890	58,586	49,168	51,757	272,580	273,850	280,290	271,080	271,692	286,318	283,094	300,656												
YEAR	<b>821,390</b>	<b>768,080</b>	<b>735,330</b>	<b>737,400</b>	<b>749,131</b>	<b>741,925</b>	<b>749,359</b>	<b>781,653</b>	<b>428,430</b>	<b>450,200</b>	<b>459,590</b>	<b>435,860</b>	<b>404,951</b>	<b>427,463</b>	<b>365,938</b>	<b>383,692</b>	<b>1,250,830</b>	<b>1,218,270</b>	<b>1,194,920</b>	<b>1,173,260</b>	<b>1,154,082</b>	<b>1,168,388</b>	<b>1,115,297</b>	<b>1,165,345</b>												

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

Appendix 16

Passenger Arrivals from the UK 2000 – 2007

	UK AIR ARRIVALS												UK SEA ARRIVALS												TOTAL UK ARRIVALS											
	2000	2001	2002	2003	2004	2005	2006	2007	2000	2001	2002	2003	2004	2005	2006	2007	2000	2001	2002	2003	2004	2005	2006	2007												
JAN	31,497	30,885	29,871	30,113	30,447	31,788	32,076	34,546	1,827	1,548	2,202	2,032	1,588	1,244	1,561	1,561	33,324	32,433	32,073	32,145	32,035	33,032	33,583	36,107												
FEB	32,227	32,366	32,622	32,177	32,998	33,881	35,320	37,030	2,832	3,386	2,720	2,484	2,510	2,418	1,837	1,719	35,059	35,752	35,342	34,661	37,808	36,299	37,157	38,749												
MAR	43,075	40,519	42,379	42,011	42,972	44,855	44,473	47,577	6,308	4,749	6,515	5,043	4,262	5,541	3,151	3,507	49,383	45,268	48,894	47,054	47,234	50,396	47,624	51,084												
APR	57,009	55,240	47,516	55,714	54,972	49,274	54,183	55,642	13,333	12,739	10,569	10,763	9,406	8,755	8,492	8,397	70,342	67,979	58,085	66,477	64,378	58,029	62,675	64,039												
MAY	69,801	64,943	59,890	65,440	64,237	65,257	59,907	65,454	12,785	13,583	12,692	13,045	10,063	10,576	9,396	9,347	82,586	78,526	72,582	78,485	74,300	75,833	69,303	74,801												
JUN	69,124	71,698	69,682	65,653	66,233	65,249	66,231	68,156	13,892	15,917	18,216	13,753	12,589	12,185	10,002	10,377	83,016	87,615	87,898	79,406	78,822	77,434	76,233	78,533												
JUL	85,633	75,894	69,104	71,535	75,181	74,411	74,204	73,354	16,955	19,060	20,264	18,379	17,301	15,910	13,177	13,896	102,588	94,954	89,368	89,914	92,482	90,321	87,381	87,250												
AUG	84,947	79,616	77,389	80,054	75,975	73,975	73,244	79,444	19,892	23,520	24,695	22,574	21,683	22,133	17,759	17,243	104,839	103,136	102,084	102,628	97,658	96,108	91,003	96,687												
SEP	75,407	70,264	63,084	62,915	66,917	66,297	67,205	70,377	14,668	17,070	16,409	15,170	13,486	12,291	10,442	10,214	90,075	87,334	79,493	78,085	80,403	78,588	77,647	80,591												
OCT	54,390	47,619	51,495	49,673	56,012	52,934	54,042	56,778	9,981	11,034	10,191	10,392	8,226	8,680	8,387	8,122	64,371	58,653	61,686	60,065	64,238	61,614	62,429	64,900												
NOV	38,789	37,219	39,334	38,455	38,345	41,683	44,846	47,692	2,999	4,642	4,499	3,306	3,455	3,018	3,034	2,835	41,788	41,861	43,833	41,761	41,800	44,701	47,880	50,527												
DEC	35,884	34,758	37,292	38,443	38,818	40,392	42,106	44,455	2,008	3,184	2,786	2,594	2,417	2,131	2,292	2,023	37,892	37,942	40,078	41,037	41,235	42,523	44,398	46,478												
SUMMER	170,580	155,510	146,493	151,589	151,156	148,386	147,448	152,798	36,847	42,580	44,959	40,953	38,984	38,043	30,936	31,139	207,427	198,090	191,452	192,542	190,140	186,429	178,384	183,937												
SPRING	195,934	191,881	177,088	186,807	185,442	178,780	180,321	189,252	40,010	42,239	41,477	37,561	32,058	31,516	27,890	28,121	235,944	234,120	218,565	224,368	217,500	211,296	208,211	217,373												
AUTUMN	129,797	117,883	114,579	112,588	122,929	119,231	121,247	127,155	24,649	28,104	26,600	25,562	21,712	20,971	18,829	18,336	154,446	145,987	141,179	138,150	144,641	140,202	140,076	145,491												
WINTER	181,472	175,747	181,498	181,199	185,880	192,599	198,821	211,300	15,974	17,509	18,722	15,459	14,232	14,352	11,821	11,645	197,446	193,256	200,220	196,658	200,112	206,951	210,642	222,945												
YEAR	<b>677,783</b>	<b>641,021</b>	<b>619,658</b>	<b>632,183</b>	<b>645,407</b>	<b>639,996</b>	<b>647,837</b>	<b>680,505</b>	<b>117,480</b>	<b>130,432</b>	<b>131,758</b>	<b>119,535</b>	<b>106,986</b>	<b>104,882</b>	<b>89,476</b>	<b>88,241</b>	<b>795,263</b>	<b>771,453</b>	<b>751,416</b>	<b>751,718</b>	<b>752,393</b>	<b>744,878</b>	<b>737,313</b>	<b>769,746</b>												

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

Appendix 17 Inter-Island Passenger Arrivals 2000 - 2007

	INTER-ISLAND AIR ARRIVALS												INTER-ISLAND SEA ARRIVALS												TOTAL INTER-ISLAND ARRIVALS											
	2000	2001	2002	2003	2004	2005	2006	2007	2000	2001	2002	2003	2004	2005	2006	2007	2000	2001	2002	2003	2004	2005	2006	2007	2000	2001	2002	2003	2004	2005	2006	2007				
<b>JAN</b>	5,566	5,785	5,399	5,191	4,716	4,835	5,300	5,300	538	150	330	279	731	220	533	414	6,104	5,935	5,729	5,470	5,447	5,782	5,368	5,714	6,649	6,032	5,633	5,191	4,716	4,835	5,300	5,300				
<b>FEB</b>	6,649	6,032	5,633	5,191	4,716	4,835	5,300	5,300	538	150	330	279	731	220	533	414	6,104	5,935	5,729	5,470	5,447	5,782	5,368	5,714	6,649	6,032	5,633	5,191	4,716	4,835	5,300	5,300				
<b>MAR</b>	8,315	7,558	6,823	6,888	6,576	6,154	6,669	7,256	1,341	994	2,308	1,015	1,432	2,496	1,221	1,547	9,656	8,552	9,131	7,903	8,008	7,586	7,890	8,803	8,315	7,558	6,823	6,888	6,576	6,154	6,669	7,256				
<b>APR</b>	7,519	6,848	7,106	6,098	6,022	5,781	5,588	5,873	7,221	6,175	5,315	7,253	5,442	5,383	4,532	5,019	14,740	13,023	12,421	13,351	11,464	11,223	10,120	10,892	7,519	6,848	7,106	6,098	6,022	5,781	5,588	5,873				
<b>MAY</b>	7,457	7,289	6,938	5,92	6,410	5,927	5,848	6,044	9,333	9,691	8,109	9,471	7,593	7,124	5,502	7,314	16,790	16,980	15,047	15,063	14,003	13,520	11,350	13,358	7,457	7,289	6,938	5,92	6,410	5,927	5,848	6,044				
<b>JUN</b>	7,634	7,154	5,972	5,470	6,356	6,356	6,827	7,151	10,052	11,659	13,042	9,511	7,783	8,173	7,656	7,265	17,686	18,813	19,014	14,981	14,139	14,139	14,483	14,416	7,634	7,154	5,972	5,470	6,356	6,356	6,827	7,151				
<b>JUL</b>	7,163	6,532	5,965	6,016	6,164	5,888	5,882	5,818	11,378	11,500	12,684	11,652	9,926	10,209	8,192	8,188	18,541	18,032	18,649	17,668	16,090	15,814	14,074	14,006	7,163	6,532	5,965	6,016	6,164	5,888	5,882	5,818				
<b>AUG</b>	7,459	6,562	5,912	4,642	5,127	5,505	5,679	5,854	14,890	17,414	17,424	14,198	10,690	12,110	11,671	12,514	22,349	23,976	23,336	18,840	15,817	16,195	17,350	18,368	7,459	6,562	5,912	4,642	5,127	5,505	5,679	5,854				
<b>SEP</b>	7,900	7,303	6,721	5,921	6,211	6,339	6,295	6,400	9,641	9,930	10,885	8,002	7,481	8,647	8,594	7,525	17,541	17,233	17,606	13,923	13,692	13,820	14,889	13,925	7,900	7,303	6,721	5,921	6,211	6,339	6,295	6,400				
<b>OCT</b>	7,214	7,284	6,448	6,462	6,903	6,443	6,711	6,613	2,973	3,563	5,661	7,719	4,092	5,659	3,386	4,387	10,187	10,847	12,109	14,181	10,995	10,535	10,097	11,000	7,214	7,284	6,448	6,462	6,903	6,443	6,711	6,613				
<b>NOV</b>	7,882	7,978	7,494	6,997	7,423	6,907	6,915	7,564	841	663	887	1,182	879	834	636	1,068	8,723	8,641	8,381	8,179	8,302	7,786	7,551	8,632	7,882	7,978	7,494	6,997	7,423	6,907	6,915	7,564				
<b>DEC</b>	6,159	5,238	5,484	5,125	5,729	5,133	5,225	5,274	935	1,705	1,587	1,244	1,485	1,490	1,731	1,037	7,094	7,443	7,071	6,369	7,214	6,618	7,056	6,311	6,159	5,238	5,484	5,125	5,729	5,133	5,225	5,274				
<b>SUMMER</b>	14,622	13,094	11,877	10,658	11,291	11,393	11,672	11,672	26,268	28,914	30,108	25,850	20,616	22,319	19,863	20,702	40,890	42,008	41,985	36,508	31,907	32,009	31,424	32,374	14,622	13,094	11,877	10,658	11,291	11,393	11,672	11,672				
<b>SPRING</b>	22,610	21,291	20,016	17,160	18,788	18,064	18,263	19,068	26,606	27,525	26,466	26,235	20,818	20,680	17,690	19,598	49,216	48,816	46,482	43,395	39,606	38,882	35,953	38,666	22,610	21,291	20,016	17,160	18,788	18,064	18,263	19,068				
<b>AUTUMN</b>	15,114	14,587	13,169	12,383	13,114	12,782	13,006	13,013	12,614	13,493	16,546	15,721	11,573	14,306	11,980	11,912	27,728	28,080	29,715	28,104	24,687	24,355	24,986	24,925	15,114	14,587	13,169	12,383	13,114	12,782	13,006	13,013				
<b>WINTER</b>	34,571	32,891	30,833	30,418	30,009	28,433	28,795	31,085	4,188	3,279	5,917	4,345	5,533	6,420	4,880	4,765	38,759	36,870	36,750	34,763	35,542	33,966	33,675	35,850	34,571	32,891	30,833	30,418	30,009	28,433	28,795	31,085				
<b>YEAR</b>	<b>86,917</b>	<b>81,863</b>	<b>75,895</b>	<b>70,619</b>	<b>73,202</b>	<b>70,672</b>	<b>71,625</b>	<b>74,838</b>	<b>69,676</b>	<b>73,911</b>	<b>79,037</b>	<b>72,151</b>	<b>58,540</b>	<b>63,725</b>	<b>54,413</b>	<b>56,977</b>	<b>156,593</b>	<b>155,774</b>	<b>154,932</b>	<b>142,770</b>	<b>131,742</b>	<b>129,212</b>	<b>126,038</b>	<b>131,815</b>	<b>86,917</b>	<b>81,863</b>	<b>75,895</b>	<b>70,619</b>	<b>73,202</b>	<b>70,672</b>	<b>71,625</b>	<b>74,838</b>				

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

Appendix 18 Continental Passenger Arrivals 2000 - 2007

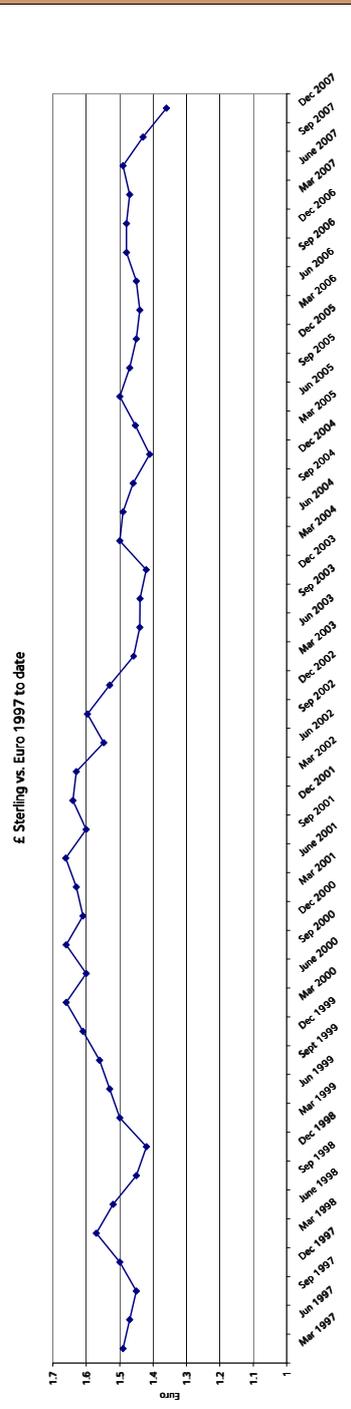
	CONTINENTAL AIR ARRIVALS												CONTINENTAL SEA ARRIVALS												TOTAL CONTINENTAL ARRIVALS											
	2000	2001	2002	2003	2004	2005	2006	2007	2000	2001	2002	2003	2004	2005	2006	2007	2000	2001	2002	2003	2004	2005	2006	2007	2000	2001	2002	2003	2004	2005	2006	2007				
JAN	3,964	3,306	2,893	2,617	1,821	1,643	1,892	1,800	2,391	3,412	4,439	4,520	3,005	5,304	4,982	5,370	6,355	6,718	7,332	7,137	4,826	6,947	6,874	7,170	6,355	6,718	7,332	7,137	4,826	6,947	6,874	7,170				
FEB	2,279	2,828	2,588	1,907	1,021	1,417	1,222	1,487	3,347	5,217	4,678	5,763	6,141	7,811	6,135	6,237	5,626	8,045	7,266	7,670	7,162	9,228	7,357	7,724	5,626	8,045	7,266	7,670	7,162	9,228	7,357	7,724				
MAR	3,014	2,980	2,527	2,410	1,466	1,658	1,491	606	7,575	7,344	9,063	9,404	5,903	10,579	7,144	10,138	10,589	10,324	11,590	11,814	7,369	12,237	8,635	10,744	10,589	10,324	11,590	11,814	7,369	12,237	8,635	10,744				
APR	5,346	4,781	3,608	3,508	2,615	2,399	2,727	1,047	22,607	21,343	19,953	24,910	24,782	20,600	22,518	25,369	27,953	26,124	23,561	28,418	27,397	22,999	25,245	26,416	27,953	26,124	23,561	28,418	27,397	22,999	25,245	26,416				
MAY	5,972	4,412	5,064	3,626	3,500	3,308	3,666	2,032	28,774	30,102	31,576	30,505	30,200	30,751	25,284	29,226	34,746	34,514	36,640	34,131	33,700	34,059	28,950	31,258	34,746	34,514	36,640	34,131	33,700	34,059	28,950	31,258				
JUN	7,110	5,610	5,539	4,173	3,643	3,663	3,678	3,858	38,600	36,183	37,184	34,704	34,647	35,862	30,164	31,663	45,710	41,793	42,723	38,877	38,290	39,525	33,842	35,521	45,710	41,793	42,723	38,877	38,290	39,525	33,842	35,521				
JUL	8,905	5,685	4,730	4,513	4,585	4,467	3,990	3,921	39,600	35,697	37,492	32,616	36,589	37,265	33,052	32,868	48,505	41,382	42,222	37,129	41,174	41,732	37,042	36,789	48,505	41,382	42,222	37,129	41,174	41,732	37,042	36,789				
AUG	6,968	4,710	4,349	4,355	3,750	4,391	3,817	3,935	51,817	50,846	48,519	47,245	41,662	49,015	37,388	41,929	56,785	55,556	52,868	51,600	45,412	53,406	41,205	45,864	56,785	55,556	52,868	51,600	45,412	53,406	41,205	45,864				
SEP	5,084	4,208	3,228	3,108	3,390	3,364	3,335	3,156	28,522	31,127	31,214	29,602	29,080	32,914	29,743	29,588	33,606	35,335	34,442	32,710	32,470	36,278	33,078	32,744	33,606	35,335	34,442	32,710	32,470	36,278	33,078	32,744				
OCT	3,261	2,444	2,212	2,217	3,126	2,965	2,374	1,847	10,026	10,173	10,588	14,029	12,340	14,635	11,433	11,484	13,287	12,617	12,800	16,246	15,466	17,600	13,807	13,331	13,287	12,617	12,800	16,246	15,466	17,600	13,807	13,331				
NOV	2,941	2,731	1,749	1,196	850	1,222	867	1,464	3,542	6,667	6,195	5,519	7,536	7,463	7,347	8,025	6,483	9,398	7,944	6,715	8,386	8,685	8,214	9,489	6,483	9,398	7,944	6,715	8,386	8,685	8,214	9,489				
DEC	1,848	1,496	1,287	972	755	760	838	1,157	5,477	7,741	7,898	5,352	7,540	6,657	6,859	5,577	7,325	9,237	9,185	6,324	8,295	7,417	7,697	6,734	7,325	9,237	9,185	6,324	8,295	7,417	7,697	6,734				
SUMMER	15,873	10,395	9,079	8,868	8,335	8,858	7,807	7,856	91,417	86,543	86,011	79,661	78,251	86,280	70,440	74,797	107,290	96,938	95,090	88,729	86,586	95,138	78,247	82,653	107,290	96,938	95,090	88,729	86,586	95,138	78,247	82,653				
SPRING	18,428	14,803	14,211	11,307	9,758	9,370	10,071	6,937	89,981	87,628	88,713	90,119	89,629	87,213	77,966	86,258	108,409	102,431	102,924	101,426	99,387	96,583	88,037	93,195	108,409	102,431	102,924	101,426	99,387	96,583	88,037	93,195				
AUTUMN	8,345	6,652	5,440	5,325	6,516	6,329	5,709	5,003	38,548	41,300	41,802	43,631	41,420	47,549	41,176	41,072	46,893	47,952	47,242	48,956	47,936	53,878	46,885	46,075	46,893	47,952	47,242	48,956	47,936	53,878	46,885	46,075				
WINTER	14,046	13,341	11,044	9,102	5,913	6,700	6,310	6,514	22,332	30,381	32,273	30,558	30,125	37,814	32,467	35,347	36,378	43,722	43,317	39,660	36,038	44,514	38,777	41,861	36,378	43,722	43,317	39,660	36,038	44,514	38,777	41,861				
YEAR	55,692	45,191	38,774	34,602	30,522	31,257	29,887	26,310	242,278	245,852	248,799	244,169	239,425	256,856	222,049	237,474	296,970	291,043	288,573	278,771	289,947	290,113	251,946	263,784	296,970	291,043	288,573	278,771	289,947	290,113	251,946	263,784				

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

Appendix 19

Selected exchange rates against sterling since January 1997

	Aus	Bel	Den	Fin	Fra	Ger	Gre	Ire	Ita	Hol	Nor	Por	Swe	Swz	Euro	USA	Canada	Japan
1997 Mar	19.28	56.63	10.44	8.13	9.24	2.74	436	1.03	2.739	3.08	10.83	2.75	233	1237	2.37	1.49	1.64	2.27
1997 Jun	20.31	59.57	10.93	8.61	9.73	2.89	458	1.10	2823	3.25	12.13	2.92	244	1283	2.41	1.47	1.66	2.30
1997 Sep	20.01	58.68	10.83	8.50	9.55	2.84	450	1.11	2783	3.20	11.46	2.90	240	1222	2.35	1.45	1.62	2.24
1997 Dec	20.88	61.19	11.30	8.99	9.93	2.97	469	1.16	2914	3.34	12.19	3.04	251	1309	2.41	1.50	1.66	2.38
1998 Mar	21.77	63.84	11.80	9.39	10.37	3.09	535	1.23	3051	3.49	12.71	3.17	263	1330	2.55	1.57	1.68	2.39
1998 Jun	21.24	62.28	11.50	9.18	10.12	3.02	508	1.20	2975	3.40	12.81	3.09	256	1326	2.54	1.52	1.67	2.45
1998 Sep	20.15	59.08	10.89	8.72	9.60	2.86	493	1.14	2832	3.23	12.66	2.94	243	1339	2.37	1.45	1.71	2.57
1998 Dec	19.65	57.63	10.64	8.49	9.36	2.79	472	1.12	2766	3.15	12.68	2.87	238	1355	2.29	1.42	1.67	2.59
1999 Mar	20.63	60.49	11.14	8.92	9.84	2.93	488	1.18	2903	3.30	12.53	3.01	249	1342	2.40	1.50	1.61	2.44
1999 Jun	21.03	61.65	11.36	9.09	10.02	2.99	496	1.20	2959	3.37	12.40	3.06	254	1337	2.45	1.53	1.56	2.33
1999 Sep	22.15	64.93	11.60	9.28	10.24	3.05	515	1.23	3023	3.44	12.87	3.13	260	1352	2.50	1.56	1.62	2.41
1999 Dec	22.15	64.93	11.98	9.57	10.56	3.15	531	1.27	3117	3.55	13.00	3.23	268	1377	2.58	1.61	1.62	2.35
2000 Mar	22.87	67.06	12.37	9.88	10.90	3.25	556	1.31	3219	3.66	13.40	3.33	277	1369	2.65	1.66	1.58	2.31
2000 Jun	21.96	64.38	11.91	9.49	10.47	3.12	538	1.26	3090	3.52	13.04	3.20	266	1341	2.49	1.60	1.52	2.25
2000 Sep	22.83	66.93	12.38	9.86	10.88	3.24	548	1.31	3212	3.66	13.28	3.33	276	1415	2.53	1.66	1.46	2.20
2000 Dec	22.41	65.69	12.15	9.68	10.68	3.18	555	1.28	3153	3.59	13.11	3.26	271	1496	2.48	1.63	1.44	2.26
2001 Mar	22.86	67.02	12.37	9.88	10.90	3.25	566	1.31	3217	3.66	13.13	3.33	276	1531	2.53	1.66	1.41	2.13
2001 Jun	22.06	64.68	11.92	9.53	10.52	3.14	546	1.26	3104	3.53	12.99	3.21	267	1577	2.37	1.60	1.48	2.33
2001 Sep	22.55	66.12	12.19	9.75	10.75	3.21	559	1.29	3174	3.61	13.07	3.29	273	1553	2.43	1.64	1.45	2.32
2001 Dec	22.42	65.72	12.11	9.69	10.68	3.19	555	1.28	3155	3.59	12.56	3.27	271	1470	2.39	1.63	1.42	2.26
2002 Mar	21.29	62.42	11.50	9.20	10.14	3.03	527	1.22	2986	3.41	11.93	3.10	257	1406	2.28	1.55	1.52	2.30
2002 Jun																		
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## Appendix 20

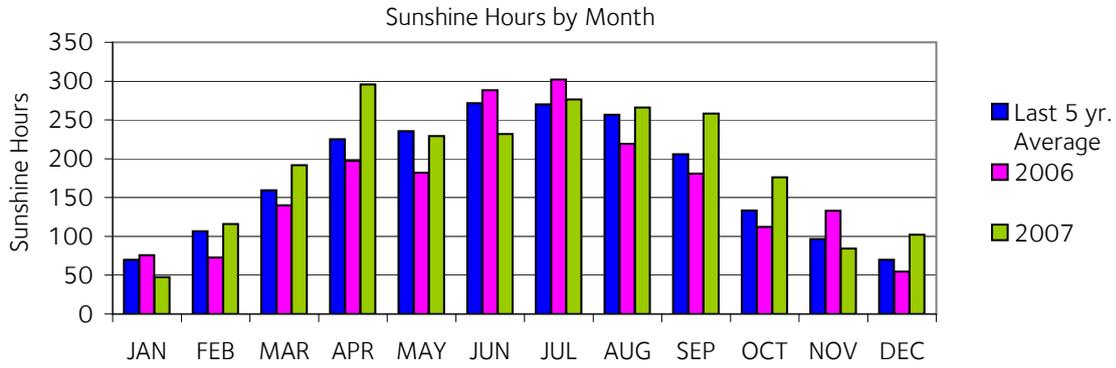
## CACI ACORN PROFILE OF GREAT BRITAIN

Group	Type	Description	% UK Pop		
A Wealthy Achievers	1 Wealthy Executives	1 Affluent mature professionals, large houses	1.7%		
		2 Affluent working families with mortgages	1.5%		
		3 Villages with wealthy commuters	2.7%		
		4 Well-off managers, larger houses	2.6%	8.5%	
	2 Affluent Greys	5 Older affluent professionals	1.8%		
		6 Farming communities	2.0%		
		7 Old people, detached houses	1.9%		
		8 Mature couples, smaller detached houses	2.0%	7.7%	
	3 Flourishing Families	9 Larger families, prosperous suburbs	2.1%		
		10 Well-off working families with mortgages	2.3%		
		11 Well-off managers, detached houses	3.7%		
		12 Large families & houses in rural areas	0.6%	8.7%	
B Urban Prosperity	4 Prosperous Professionals	13 Well-off professionals, larger houses and converted flats	0.9%		
		14 Older Professionals in detached houses and apartments	1.4%	2.3%	
	5 Educated Urbanites	15 Affluent urban professionals, flats	1.1%		
		16 Prosperous young professionals, flats	0.9%		
		17 Young educated workers, flats	0.6%		
		18 Multi-ethnic young, converted flats	1.1%		
	6 Aspiring Singles	19 Suburban privately renting professionals	0.9%	4.6%	
		20 Student flats and cosmopolitan sharers	0.6%		
		21 Singles & sharers, multi-ethnic areas	1.6%		
		22 Low income singles, small rented flats	1.2%		
	C Comfortably Off	7 Starting out	23 Student Terraces	0.4%	3.8%
			24 Young couples, flats and terraces	1.0%	
8 Secure Families		25 White collar singles/sharers, terraces	1.4%	2.4%	
		26 Younger white-collar couples with mortgages	1.9%		
		27 Middle income, home owning areas	2.9%		
		28 Working families with mortgages	2.6%		
		29 Mature families in suburban semis	3.3%		
		30 Established home owning workers	3.6%		
9 Settled Suburbia		31 Home owning Asian family areas	1.1%	15.4%	
		32 Retired home owners	0.9%		
10 Prudent Pensioners	33 Middle income, older couples	3.0%			
	34 Lower income people, semis	2.1%	6.0%		
D Moderate	11 Asian Communities	35 Elderly singles, purpose built flats	0.7%		
		36 Older people, flats	1.9%	2.6%	
	12 Post Industrial Families	37 Crowded Asian terraces	0.5%		
		38 Low income Asian families	1.1%	1.6%	
	13 Blue Collar Roots	39 Skilled older family terraces	2.8%		
		40 Young family workers	2.1%	4.9%	
		41 Skilled workers, semis and terraces	3.3%		
E Hard Pressed	14 Struggling Families	42 Home owning, terraces	2.8%		
		43 Older rented terraces	1.8%	7.9%	
		44 Low income larger families, semis	3.3%		
		45 Older people, low income, small semis	3.0%		
		46 Low income, routine jobs, unemployment	1.4%		
	15 Burdened Singles	47 Low rise terraced estates of poorly-off workers	2.6%		
		48 Low incomes, high unemployment, single parents	2.1%		
		49 Large families, many children, poorly educated	1.7%	14.1%	
	16 High Rise Hardship	50 Council flats, single elderly people	1.8%		
		51 Council terraces, unemployment, many singles	1.9%		
		52 Council flats, single parents, unemployment	0.8%	4.5%	
17 Inner City Adversity	53 Old people in high rise flats	0.8%			
	54 Singles & single parents, high rise estates	0.9%	1.7%		
		55 Multi-ethnic purpose built estates	1.1%		
		56 Multi-ethnic, crowded flats	1.1%	2.2%	
		57 Unclassified	0.3%	0.3%	

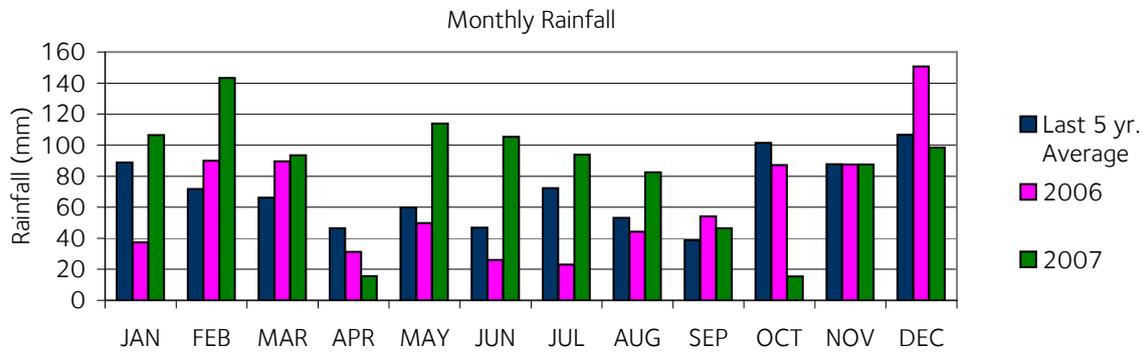
Note: \* Corresponding grades represent national average

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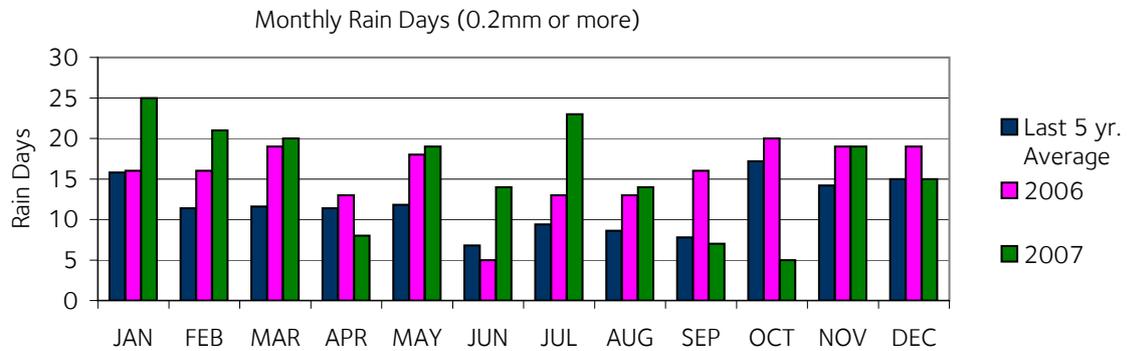
Appendix 21



Figures are recorded at Fort Regent



Figures are recorded at St. Louis Observatory



Figures are recorded at St. Louis Observatory

Source: Jersey Meteorological Department  
[www.jerseymet.gov.je](http://www.jerseymet.gov.je)



# VISITOR REGISTRATION CARD

0362784

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

<b>NUMBER IN ROOM</b>	<b>Adults</b>	<b>Children under 16</b>	<b>VRC</b>	<b>ARRIVAL DATE</b>	<b>DEPARTURE DATE</b>
				DD MM YY	DD MM YY
				20	20
<b>FIRST ADULT (16+)</b> (full name and nationality must be completed for all adults within a room)					
Surname				MAIN PURPOSE OF VISIT	
Forename				(First adult only)    Holiday <input type="checkbox"/> Sport <input type="checkbox"/> Business <input type="checkbox"/> Conference <input type="checkbox"/> Other <input type="checkbox"/>	
Title (Mr/s etc.)		Date of birth		COUNTRY OF RESIDENCE	
		DD MM YY		(First adult only)    U.K. <input type="checkbox"/> Ireland <input type="checkbox"/> Jersey <input type="checkbox"/> Other C.I. <input type="checkbox"/> Other (please state) _____	
Nationality				HOME ADDRESS	
				House No. _____ Postcode _____	
				House Address _____	
<b>SECOND ADULT (16+)</b>					
Surname					
Forename					
Nationality					
<b>THIRD ADULT (16+)</b>					
Surname					
Forename					
Nationality					
<b>FOURTH ADULT (16+)</b>					
Surname					
Forename					
Nationality					
<b>WHEN DID YOU BOOK YOUR VISIT?</b>					
Less than 1 month ago		<input type="checkbox"/>		1-3 months ago <input type="checkbox"/>	
More than 3 months ago		<input type="checkbox"/>		More than 3 months ago <input type="checkbox"/>	
<b>DID YOU BOOK YOUR ACCOMMODATION DIRECT WITH THE ESTABLISHMENT?</b>					
No		<input type="checkbox"/>		Yes <input type="checkbox"/>	
<b>HOW DID YOU TRAVEL TO JERSEY?</b>					
By air		<input type="checkbox"/>		By sea <input type="checkbox"/>	
No		<input type="checkbox"/>		Yes <input type="checkbox"/>	
<b>HAVE YOU VISITED JERSEY BEFORE?</b>					
No		<input type="checkbox"/>		Yes <input type="checkbox"/>	
<b>SIGNATURE</b>					
_____					

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.**

For further information visit

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

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