



Jersey Tourism
A Year in Review 2008



Jersey Tourism Annual Report

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Foreword from the Minister for Economic Development

The tourism industry continues to provide a valuable contribution to the Jersey economy with an estimated on Island spend of £238m during 2008 derived from a mix of visitors who come for a variety of reasons including leisure, business, and to visit friends and family. Apart from the direct spend in our hotels, shops, restaurants, bars and attractions, they provide the viability for much of the infrastructure we all enjoy and which otherwise would not be maintained.

It is not surprising that the global economy is having such a large impact on the visitor economy and that we in Jersey are having to work so hard across the entire industry to simply sustain our share of this most competitive market. Additional resources have been, and will continue to be, deployed in support of the marketing effort to promote Jersey in key source markets as we strive for our share of visitors.

During 2008 the statistics show that Jersey performed well during the first 8 months of the year in the leisure market and, in fact, arrivals and occupancy for accommodation properties were very robust until the month of September when the economic decline was seen to take effect. Business visitors had started to decline in numbers earlier in the year after many months of continuous increases.

Jersey had its own particular problem in late February when the Haut de la Garenne enquiry attracted an unprecedented level of adverse publicity from both national and international media which necessitated the withdrawal of advertising whilst the publicity was at its height.

Research undertaken at the time showed that consumers were not dissuaded from the concept of a Jersey visit and this gave encouragement to commence a campaign in late March and April. This campaign had an immediate positive effect on bookings.

The difficult economic situation has taken its toll on transport providers who have also had to deal with huge oil price increases, which at times threatened the operation of many of our services. Fortunately, the very high price levels were not sustained and although some services by air and sea were cut the overall programme continued to offer choice, quality and value to our customers. The policy of support for carriers through economic intervention in the form of reduced landing charges, direct subsidy and marketing, is providing the stimulus to encourage the continuation of existing services and to start some new routes.

The strength of the Euro against sterling provides us with an ongoing opportunity to promote Jersey as a value destination particularly from Europe where we have been developing business for a number of years. In the recent past, Jersey has been perceived as expensive to these visitors so the favourable exchange rates should provide a welcome boost for accommodation and attraction providers as well as the retail sector. The UK visitor will also find Jersey more attractive than many Euro destinations outside of the sterling area, with domestic holidays poised for a significant increase in popularity during 2009.

The events programme which the department supports and in some cases organises, continues to provide vibrancy and entertainment for all, with events like The Battle of Flowers and the Air Display providing the highlights of the summer in Jersey. I am particularly grateful to all of the volunteers who give so much time and endeavour to these and other events to make them the success which they are. The real challenge ahead will be to encourage more business houses to take the opportunity of becoming involved and especially to provide the necessary sponsorship to enable these iconic Jersey festivals to grow.

My Ministerial colleagues within Economic Development, Connetable Len Norman and Senator Paul Routier, are equally committed to the future success of this industry and join me in thanking my predecessor, Senator Philip Ozouf, the many professionals throughout the industry and particularly the staff within the Department for their superb efforts during 2008 in achieving a very successful year for the visitor economy under difficult circumstances.

Senator Alan Maclean
Minister for Economic Development

Jersey Tourism Annual Report 2008

For the visitor economy in Jersey to end the year with a drop of only 1.3% after two major setbacks is a more than satisfactory result and one which was achieved by a great deal of effort across all sectors of the industry.

Following the modest growth of 1.5% in total visitor volume in 2007 prospects looked very strong for a continued upward trend despite the difficulties of the spring period. In fact by the end of August visitor numbers were continuing to grow showing an increase of 1.2%. Unfortunately, the global economic downturn started to affect the leisure market in September and has since continued to impact on all market segments.

The policy of support for air route development has been very successful and is crucial as it encourages new entrants to replace those which are inevitably lost as carriers continually review their business operations in a quest for volume and yield. During 2008 the very valuable Thomsonfly links were lost as a result of the company ending its domestic scheduled network but were replaced by the start of easyjet from Luton and Liverpool and Jet2 from Leeds. Changes are likely to remain a feature in the future making it important to support and encourage the new services to replace those which will be lost by offering both operational incentives and joint marketing to ensure that Jersey continues to feature on the new schedules.

The shortening average length of stay has had a detrimental effect on room night occupancy which will inevitably be of concern to hoteliers who must work proportionately harder to achieve the same occupancy when visitors are reducing their stay. This is not an unexpected trend as Jersey has successfully penetrated the lucrative short stay market and transportation services have aligned themselves to that trend.

The economic downturn being experienced during the early period of 2009 is expected to last and to have an ongoing effect on the visitor economy. The Department has reacted with a strategy embodied in a 10 point plan designed to provide direction to the industry during these difficult times. Since November 2008 an industry-wide task force consisting of all sectors of the industry has been monitoring business patterns and working in partnership to respond to the constantly changing market conditions.

The summer of 2008 was the first for the Visitor Services Centre in the new location in Liberation Place at the western end of the Island site. The new location, whilst necessary to allow the redevelopment of the former building, has not proved popular with visitors who have struggled to find their way to our door despite a significant number of directional signs. This has resulted in a reduction in visitor numbers to the centre which we hope to rectify with a move back to Liberation Square in time for the 2010 season, subject to planning and other approvals.

Marketing Jersey in 2008

Little did we know when we were planning for 2008, the unprecedented events that would unfold from Haut de la Garenne at the end of February. The first quarter of each year is vital for our destination marketing; we know from our research that this is when our customers are in the 'consideration period' researching and mulling over their holiday options.

The world's media descended upon Jersey and it was inevitable that we would have to temporarily suspend all UK marketing activity. Promoting Jersey as a friendly, safe, idyllic holiday destination was not appropriate while the newspapers and TV stations all gave significant space to the alleged crimes.

During this two week marketing black-out, enquiry levels and bookings all but stopped, testament to the fact that the campaign was working. However, we hope that we never again have to test our campaign in such a dramatic manner. Web visits increased for a short period and then dropped. Our biggest referring site at the time was Wikipedia, a site which had never featured in our top ten referring sites in the past. We also had an unusually large volume of foreign web visits; we put both of these swings down to people researching Jersey following the world's media hype.

In terms of brochure responses, we set a target of 100,000 and achieved 109,000 packs from our mailing house, down on 2007, and a further 26,000 via trade shows, exhibitions and our visitor centre. Our mailing house also dealt with 9,000 direct requests for the Autumn/Winter pureJersey guide, which will continue to be delivered in the first quarter of 2009.

The Minister for Economic Development allocated additional funding for tourism marketing, following Haut de la Garenne. This enabled us to run a TV campaign during April, increase our online pay-per-click campaign and, in conjunction with industry partners, send a direct mail piece to 56,000 UK consumers and 53,000 online consumers from Jersey Tourism's database. This significant increase in our spring marketing was a great boost following the adverse publicity.

During the year, we worked with a host of tourism businesses as part of our annual partner opportunities programme, reflecting the continued involvement and quality of our joint marketing activity.

Unfortunately, Haut de la Garenne was not the end of external factors that would effect Jersey's tourism industry. Little did we know when Northern Rock was nationalised in February that the sub-prime issues and the resulting credit crunch would lead to a global economic meltdown, which will undoubtedly have a negative effect on the travel and tourism industry well into 2009 and beyond.

The first half of 2008 saw growth, building on our success in 2007, with June finishing 1.4% up for the UK market and 1.7% overall. By September, the reality of the economic recession was hitting, with the collapse of Wall Street bank Lehman Brothers. In October, our visitor numbers dipped by nearly 1% and this slide continued for the rest of the year.

Having achieved a 2.1% growth in 2007, nearly 8,000 extra staying leisure visitors, it comes as a huge disappointment to finish the year nearly 6,000 visitors down or 1.9% in 2008. However, we need to put this loss of business into context with the environment that we are now living in. All of the world's leading holiday destinations have suffered huge losses in visitor numbers and 2009 will be a very difficult year for all.

Whilst the UK dominates in terms of visitor numbers, Jersey receives a significant number of French and German visitors. During 2008 the French market produced a small reduction of 1.8% to nearly 33,000 staying visitors who mainly came from Brittany, Greater Paris, Normandy and the Loire Valley. With prospects looking more positive for the future because of the high value of the Euro against Sterling a full market research programme was undertaken which has led to the appointment of a new advertising agency and a revised strategy for marketing Jersey in France. In 2008 the German market produced over 9,000 staying visitors, a decline of 6% over 2007 as a result of fewer charter seats being available from the key departure cities.

Jersey Tourism – Advertising effectiveness.

We employ various measurement tools each year to track the effectiveness of our campaigns. Our advertising tracking research is carried out by an independent research company which interviews nearly 2,000 people from our target audience across the UK in November, March and June. The main purpose of this research is to measure our advertising and brand awareness, recognition of our advertising and response to our advertising.

Following our success in 2007 when the new campaign was launched, ad recall increased from 2% to 10%, our target is to maintain at 7% to 10% going forward. In 2008 ad awareness was 9%, this was at it highest after the TV advertising for the post-family audience, which was up from 9% to 14% then stabilising at 11%.

Visually prompted awareness of our TV advertising rose from 13% to 22% and for press advertising from 13% to 17%.

Ad recognition was also at its highest with at the mid point (March) 43% recalling seeing an ad for Jersey, exceeding levels seen at that stage in 2005 and 2007.

By the end of June, 48% of the sample had booked a holiday of 5 nights or more. This was up from 32% in early March and just 15% in early December.

Public Relations activity in 2008

During 2008 the Jersey Tourism PR team hosted and facilitated 272 print media visits, 16 TV companies, 12 radio stations and 33 on line publishers, principally from the UK, France, Germany and Benelux.

International media from South Africa, Canada, the US and Japan were also facilitated largely through the Visit Britain partnership.

The PR team initiated a very significant event in partnership with the British Guild of Travel Writers – hosting 400 travel writers and tourism leaders to a dinner at the London Marriott that featured Jersey produce. This was in conjunction with ten major Jersey hotels.

2008 Results

UK Market

In 2008 65% of the population were reached by Jersey Tourism coverage. The overall volume of coverage rose 11% year on year.

- 1016 articles mentioned Jersey between January and December 2008
- 65% of UK adults were reached by coverage in this period, and each UK adult was reached approximately 15.6 times
- 31.6m UK adults were reached
- 98% of coverage was favourable; 29% strongly so
- All Press release and press visit coverage was favourable. 66% of which was strongly favourable, demonstrating the importance of this coverage in driving strongly favourable articles
- Press release coverage increased from 80 to 183 articles
- Press visit coverage increased from 71 to 130
- Cost per thousand reached: £8.72

Jersey achieved 20 articles in The Daily Telegraph and 24 articles in the The Times during the year. People who have taken four or more holidays in the last 12 months are 7% above the national average of Daily Telegraph readers and 4% above the national average of Times readers (UK Pulse).

Note:

The Times was the most prolific national publication with 24 articles.

It featured seven short break articles describing Jersey as “an excellent option for a thrifty trip”.

Using UKPulse to examine the media consumption of people who take short break holidays revealed that Times readership is 3.2% higher than the national average, thus showing that coverage is being read by relevant audiences to Jersey Tourism.

Message delivery:

'Is an ideal place to take time out' was the most prolific message and featured in 42% of coverage. This message featured in 422 articles and was delivered 545 times indicating that it also achieved multiple deliveries within articles.

65% of articles that delivered this message also mentioned the 'short break' holiday type.

Key Stories

- J onal Choir Competition. Jersey Tourism organizes entertainment before the main competition
- The 10th Jersey regatta sports boating event takes place
- £150m of tourism related development is taking place in Jersey
- Jersey is a fresh gastro destination, with high quality local produce and two Michelin starred restaurants
- A cheap air link to Jersey via Birmingham International announced
- Haut de la Garenne investigation takes place
- Air Southwest and Jersey Tourism teamed up to launch a new joint marketing campaign aimed at boosting autumn and winter visitors.
- Jersey can be visited 'flight-free' as a half-term family break
- Jersey Tourism wins the award for the 'Tourist Office offering the best assistance to agents for the UK and Ireland'
- Flybe and KIA announce 2009 flight schedules

French Market

- 85 items mentioned Jersey Tourism during the year.
- All coverage was favourable, 28% strongly so.
- The proportion of strongly favourable items more than doubled, from 13% in 2007 to 28% in 2008.
- Press release and press visit articles helped to drive this strongly favourable coverage accounting for 54%.
- Message delivery was also strong within press release coverage with each piece delivering at least one key message.
- In addition to this 17 of the 21 press release items mentioned Jersey Tourism partners, contributing one-third of total uses of this impact measure.
- The 'Ease of access to the island' message was the most prolific and featured 33% of articles. This message was driven by news of the opening of new transport channels to the island.
- The messages 'Is an ideal place to take time out', 'Is an ideal location for activity based holidays' and 'Has unique and interesting heritage and culture' also featured in over 20% of coverage.
- Each impact measure appeared in a higher volume of coverage in 2008 compared to 2007. This was an excellent result because the overall volume of coverage decreased by 31%. This was because the Tour de Bretagne featured in 62 articles in 2007.
- 'Short breaks' were the most prominent holiday type in coverage, being mentioned in 28 articles.
- The 'short breaks' coverage highlighted the close proximity between France and Jersey, suggesting that readers would be familiar with Jersey. The focus of the articles was on the regions of the island closest to France.

Key stories

- Flights to Jersey are available from Nice and Marseilles, and will soon be available from Paris
- Condor Ferries offers lovers a Valentine's weekend on Jersey as a welcome change to the usual romantic gestures
- HD Ferries announces (March) it is re-starting its service from St Malo to Jersey
- Plans are afoot to hold a full stage of the Tour de Bretagne cycling race on Jersey in 2010

- Jersey events are recommended including: the Jersey Air Show, Festival of Motoring and Fete de Noue
- Jersey's cliff paths and botanical gardens will appeal to nature lovers looking for a short break
- Tourist figures for this season show a 3% rise in total for Jersey, and a 7% rise in the number of French visitors
- HD Ferries announces (September) it is stopping routes to the Channel Islands early due to fuel prices and the state of the economy

German Market

- 559 items mentioned Jersey Tourism during the year.
- All coverage was favourable, 17% strongly so.
- Coverage volumes more than doubled year on year.
- The overall rise in coverage was due to a huge rise in the number of regional articles. There was a percentage increase of 350% in the regional coverage from 2007 to 2008.
- The majority (70%) of regional coverage featured between June and August. This was driven by news of the 'The Battle of the Flowers' and walking tours, specifically 'Walking Week' on the island.
- 77% of articles included the website URL (jersey.com). This was boosted by inclusions in press release-driven articles (93% of which included the website).
- Almost one-quarter (22%) of articles mentioned Jersey Tourism's partners of which 43% were driven by press visits. This demonstrates the enhancing influence PR can have on the impact of coverage.
- Press visits led general introductions to the island, covering areas such as history and location.
- These items boosted favourability (87% were strongly favourable) and were rich in message delivery, with each item delivering at least one message or more.
- Explore (Outdoors / active) was the most prolific product cluster, featuring in 67% of articles.
- Mentions were boosted by press-release driven items on moon walks and open gardens on the island whilst 17% of articles mentioned 'The Battle of Flowers'.
- Golf Welt included a feature on the island's golfing facilities and a syndicated item in Saarbrucker described the extreme sports available, such as 'coasteering' or kayak trips out to Les Ecrehous.

Key stories

- Jersey Gardens are open to the public in spring and summer.
- Jersey hosts 'The Battle of the Flowers' in August, which culminates in a fireworks show.
- Autumn 'Walking Week' will enable visitors to see all aspects of the island.
- Visitors to Jersey can take part in guided Moon Walks on the beach at low tide.
- Jersey is increasingly becoming a place for active holiday-makers.
- Air Berlin announces news of flights to Jersey in the summer of 2009.

Product Development and Events 2008

Events

In 2008, 44 events took place ranging from sporting activity such as the Standard Chartered Jersey Marathon, to motoring festivals, music events; International Choir Festival and Jersey Live to country shows namely the West Show and La Foire de Jersey at the Royal Jersey showground.

Ten of these events were developed and implemented by the Tourism events team, including a new event to celebrate 'Madeira Day' – an opportunity to showcase the importance of the local Madeiran community and their contribution to Island life and the tourism industry.

Highlights of this tourism event activity included 'Liberation Day' which saw over 8,000 people attending the event in People's Park and sampling a taste of Jersey circa '1945' with Big Band music, re-enactments and street theatre. The 'Spring Walking' festival attracted over 849 walkers, 691 of which were visitors, whilst the Autumn Walking week attracted more:-947 – 769 of which were on holiday in September.

'Gorey Fete de la Mer' – a seafood event which launches the tourism season in Gorey was a great success with live music, street theatre and a host of maritime crafts and restaurateurs showcasing local scallops, oysters and other local delicacies.

'Out of the Blue' a maritime festival staged at the Jersey harbour again attracted record numbers with over 15,000 attending over the weekend despite stormy weather and high winds.

Other food related events included 'Black Butter' making at the Elms – in conjunction with the National Trust for Jersey at its beautiful headquarters in St Mary. This event provides an opportunity for visitors to participate in an age old culinary tradition and to soak up a traditional atmosphere with a Genuine Jersey market.

La Fête dé Noué took place from 27th November to 28th December and enabled Sunday trading activity to take place during this period. Highlights included the Victorian Christmas event at Hamptonne, Christmas markets, the Christmas Battle of Flowers Parade and a lantern parade through the streets of St Helier with the island's school children.

This festival and event activity contributed to attracting visitors to Jersey, increasing on island spend and supporting the Jersey brand.

Market Research

The influence of festivals and events was measured in the 2008 Visitor Survey. Although only 1% of respondents claimed that they had visited Jersey specifically to attend a Jersey Festival or event, a total across the year of 12% claimed that their decision to visit Jersey in 2008 was influenced to some extent by a wish to attend a Jersey Festival or event.

Those claiming that a Jersey Festival or event was a 'big influence', has increased from 4% in 2006 to 6% in 2008.

Those who visited Jersey in the months of July and August (15%), were more likely to have been influenced by a festival or event, with those visiting in the spring (8%) being least likely to have been influenced by a festival or event. 11% of winter visitors were influenced to some extent by a festival or event.

Those who had visited Jersey before (14%) were also more likely to have been influenced by a festival or event than first time visitors (9%), as were those who stayed more than 7 nights (22%).

Grants and Sponsorships

Jersey Tourism granted financial assistance to over 22 external event organisers, providing event and marketing assistance, post event analysis and evaluation. New events included the World 2008 Kempo Karate Championship, World Cheese Festival and the cross-arts Branchage Film Festival.

In addition to the specific events programme supported by the department, grants were provided to the Arts Centre for the delivery of a programme of art and cultural entertainment and to Jersey Heritage Trust for events such as La Fa's'sie d'Cidre (Cider Festival).

Branding and Distribution

Phase II of the Airport branding project was undertaken together with 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.

Product Development

The team continued to work closely with industry partners such as 'Art in the Frame', the National Trust for Jersey, Jersey Heritage and Transport and Technical Services in developing arts and heritage tourism, walking and cycling routes, green initiatives and further promotion of local products and services. The team were also invited to lead workshops at the 'Big Food Debate' at the Abergavenny Food festival showcasing Jersey as a food destination.

A range of Farmers' Markets and Genuine Jersey markets took place throughout the year principally held at La Place de St Aubin in St. Brelade. Work continues to take place through the auspices of Genuine Jersey to encourage local producers to trade and to develop products so that visitors can take home a Genuine Jersey souvenir.

Walking continues to be a key tourism 'product' and a year long guided walking programme was developed in conjunction with the local Tour Guides Association and new walking routes and heritage trails were developed on line.

223 guided walks were provided to visitors from April through to September. These included 'classic cattle' tours, walks to private gardens at Rozel, 'Living with the Enemy' heritage tours, nature rambles and food trails. Over the course of the season 897 people participated in these walks with the Blue Badge Guides.

A pilot study was commenced in 2008 with the Green Tourism Business Scheme with 14 local businesses signing up to participate. The GTBS is the national sustainable tourism certification scheme for the UK and is the only certification scheme validated by Visit Britain, through the International Centre for Responsible Tourism (ICRT).

Other initiatives included the development of guides to St Aubin and Gorey with the aim of driving visitor business to these visitor destinations, promoting walking and heritage trails, restaurants, cafes and other visitor attractions.

The Conference Market

The conference market is one of the most competitive, and despite the significant improvements which have been made to the quality of the Jersey conference product, competition has been intense, particularly in the corporate sector in which a number of events have been either postponed or cancelled due to the difficult economic climate.

Residential conference delegate numbers decreased by 5% from 9,700 in 2007 to 9,200 in 2008.

The number of conferences decreased by 3% from 311 in 2007 to 303 in 2008. The number of Corporate delegates was 5,440 while the number of Association delegates was 3,750.

However, the number of bed nights sold increased by 26% from 29,000 in 2007 to 36,450 in 2008. This is particularly due to the increase in association sector events, specifically in the shoulder periods, which tend to attract delegates to stay longer than corporate events.

The Jersey Conference Bureau enjoyed specific recognition during the year by winning several awards for the quality of its marketing materials. These included from the MIMA, best destination brochure, best print advertising, best brand marketing and best stand design at International Confex.

Jersey 10 point strategy for dealing with the economic downturn of 2009.

A range of measures have been identified to underpin the marketing strategy for Jersey as the industry strives to compete in unprecedented conditions in the wake of the economic downturn. An industry task force started to meet in November 2008 and will continue as long as conditions require.

1. Increase Tourism Relevance

Action to convince Government and the local population that tourism is an important contributor to the Jersey economy and way of life and therefore worthy of investment.

2. Route Marketing

Extend route marketing support for carriers in order to encourage the reinstatement of some of the dormant low cost routes and charter operations.

3. Ambassador Programme

Solicit the services of Jersey connected celebrities, and on brand personalities who can act as ambassadors through media and other channels.

4. Increase Trade Support

Educate the industry, both local suppliers and externally, travel agents etc to talk up the Jersey story and to be confident in introducing clients to the Island. This will involve increased publication of relevant management information and performance data.

5. Increase Marketing Funding

Gain support for and deploy a jointly funded additional marketing campaign with a target value of £1m, highlighting points of competitive advantage. For example, exchange rates, safety, security and ease of access.

6. Media

Harness the power and support of the media in key source markets. Jersey has made a significant investment and therefore has a reservoir of contacts developed through many years of hosting a visiting journalists programme.

7. Target Visiting Friends and Relations

Motivate the VFR segment of the market as they are likely to be loyal to Jersey and therefore more resilient to economic difficulty, by encouraging the local population to invite their friends and personal contacts.

8. Product Clusters

Develop business clusters for product enhancement and joint marketing activity throughout the industry. Especially where partnership funding is more likely to be available and where we can best demonstrate the quality of our offering.

9. Add Value

Incentivise the Jersey product by defining and promoting value added offers and encourage immediate travel opportunities. Value added is preferable to unsustainable discounting but based on an assumption that the base price is already competitive.

10. Improve Conversion

Improve the enquiry to booking process by gathering better quality information and using the intelligence to incentivise conversion.

Financial Report

	"2008 Actual £000"	"2007 Actual £000"
Corporate		
Strategy and Policy	1,224	1,794
Research and Planning	186	253
Communications		
Advertising and Media	1,845	2,247
Distribution	191	214
Marketing Services	431	551
Product Development	906	989
Market Development		
Public Relations	562	549
Trade Relations	977	386
Consumer and Media Relations	675	885
Visitor Services	324	282
Net Revenue Expenditure	£ 7,322	£ 8,150

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

Key Financial Results

Total net revenue expenditure for 2008 decreased by £838,000 (-10%) when compared with 2007.

Part of the decrease can be attributed to the the move to UK GAAP, where the cost of 2009 Tourism brochures has been carried forward into 2009 and effectively reduced expenditure by £263,861. In addition, during 2007 there was one-off expenditure on relocation and Island Branding.

Corporate expenditure decreased by £637,00 (-31%)

The decrease in Corporate Strategy and Policy expenditure was mainly due to one-off costs in 2007, including the relocation to the new Tourism Building at Liberation Place (£375,000) and Island Branding (£120,000). Corporate Research & Planning expenditure decreased by £67,000 due to the Visitor Exit Survey in 2007, which is only conducted once every few years.

Communications expenditure decreased by £628,000 (-16%)

During 2007 Communications Advertising included Trade Relations (£600,000). However, in 2008, due to its importance, it was reported separately under Market Development (see below). In line with UK GAAP, the cost of 2009 Tourism brochures has been carried forward to 2009, effectively reducing expenditure by £263,861. Taking these factors to one side, Communications Expenditure increased by £235,000.

The increased spend related to £210,000 for additional advertising in response to the Historic Child Abuse Enquiry (HCAE), for which it received budget. The Tourism Development Fund paid £250,000 for HCAE Advertising costs which are reported separately in the Tourism Development Fund Annual Report.

Market Development expenditure increased by £437,000 (+21%)

The increase is mainly due to the change in reporting Trade Relations under Marketing Development for 2008 (see above)..

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.

The same survey is being conducted throughout 2009.

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

The most recent passenger exit survey was undertaken throughout 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.

2008 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 – 2008

	2003 Jersey Travel Survey	2004	2005 Jersey Travel Survey	2006	2007 Jersey Travel Survey	2008	2008 vs. 2007
On-Island Visitor Expenditure	£213 million	£222 million	£220 million	£221 million	£234 million	£238 million	1.8%
On-Island Visitor Expenditure Reflated to 2008 levels	£258 million	£254 million	£247 million	£241 million	£245 million	£238 million	-2.6%
Total Tourism Visitor Volume	748,600	747,100	752,300	728,500	739,300	729,700	-1.3%
Total bed nights sold over year	2.19 million	2.19 million	2.14 million	2.07 million	2.08 million	2.03 million	-2.2%
Total room nights sold over year	1.08 million	1.06 million	1.04 million	1.02 million	1.03 million	1.00 million	-2.2%
Staying Leisure Visitor Volume	378,900	384,500	380,900	368,200	375,900	370,900	-1.4%
Staying Leisure Visitor Average Stay	5.0	4.9	4.8	4.8	4.6	4.4	-2.4%
Staying Leisure Visitor On-Island Expenditure	£153 million	£157 million	£155 million	£155 million	£160 million	£161 million	0.6%
Staying Leisure Visitor On-Island Expenditure Reflated to 2008 levels	£186 million	£181 million	£175 million	£169 million	£167 million	£161 million	-3.5%
Staying Business Visitor Volume	64,100	59,100	56,600	61,600	72,000	67,300	-6.5%
Staying Business Visitor Average Stay	2.1	2.2	2.2	2.1	2.2	2.3	4.8%
Staying Business Visitor On-Island Expenditure	£18 million	£17 million	£17 million	£19 million	£24 million	£24 million	2.4%
Staying Business Visitor On-Island Expenditure Reflated to 2008 levels	£21 million	£20 million	£19 million	£20 million	£25 million	£24 million	-2.2%
Staying Conference Visitor Volume	4,200	5,500	5,900	8,800	9,700	9,200	-5.2%
Staying Conference Visitor Average Stay	2.9	4.3	3.2	3.4	3.0	4.0	32.4%
Staying Conference Visitor On-Island Expenditure	£1.9 million	£3.6 million	£3.1 million	£5.0 million	£5.3 million	£5.5 million	3.1%
Staying Conference Visitor On-Island Expenditure Reflated to 2008 levels	£2.3 million	£4.1 million	£3.5 million	£5.4 million	£5.4 million	£5.5 million	1.1%
Day Trip Visitor Volume	160,200	147,500	145,700	139,400	141,900	143,600	1.2%
Day Trip Visitor On-Island Expenditure	£7.7 million	£7.1 million	£6.7 million	£6.3 million	£7.5 million	£8.1 million	7.5%
Day Trip Visitor On-Island Expenditure Reflated to 2008 levels	£8.7 million	£7.6 million	£7.1 million	£6.6 million	£7.9 million	£8.1 million	1.9%
Hospitality sector <u>companies</u> tax revenue ¹	5.0 million	5.9 million	5.9 million	5.3 million	n/a	n/a	
Hospitality sector jobs ²	6,360	6,130	6,110	6,160	6,210	6,060	-2.4%
Registered accommodation establishments	178	168	166	161	159	145	-8.8%
Registered tourism bed spaces ³	14,347	13,710	13,400	13,100	13,100	12,700	-2.1%
Total bed nights available over year	3,416,500	3,425,300	3,394,400	3,395,800	3,351,300	3,485,600	4.0%
Average yearly bed space occupancy	64%	64%	63%	61%	62%	58%	-2 % points ⁵
Average yearly room space occupancy	70%	70%	70%	67%	69%	65%	-4 % points ⁵
August bed space occupancy	91%	91%	89%	82%	84%	83%	-1 % point ⁵
August room space occupancy	92%	93%	92%	88%	90%	87%	-3 % points ⁵
Total booking revenue generated by JerseyLink	£1.7 million	£1.5 million	£1.3 million	£1.5 million	£1.6 million	£1.2 million	-26.0%
www.jersey.com - Total Unique Visitors ⁴				1,417,800	1,602,000	n/a	
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	n/a	

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

² The Hospitality sector as defined by the Manpower Survey consists of tourism related accommodation, restaurants and bars. The figures are from the Manpower Survey, June 2008 (Statistics Unit, Policy and Resources Department). Again the hospitality sector alone does not constitute the full impact of tourism upon employment in Jersey.

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

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

⁵ % 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 62% in 2007 and 58% in 2008 - this means that average occupancy across the year was 4% points lower in 2008 than it was in 2007.

Jersey Tourism 2008

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

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 reflat results from the 2007 Travel Survey. Expenditure figures do not include passenger landing fees, travel to Jersey or revenue generated into the economy through employment and capital and/or revenue expenditure.

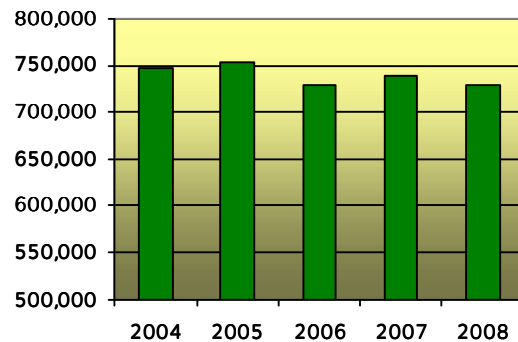
The following summary of 2008 results emphasises the importance and impact of tourism in Jersey.

- 729,700 Visitors.
- 370,700 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.
- Over 2 Million overnight stays (bed nights sold) in paid accommodation (excluding visiting yachts).
- £238 million estimated on-island spend.
- £120 million estimated visitor spend on accommodation.

1.2 Total Visitor estimates

Figure 1 below shows that the number of visitors decreased by 1.3% from 739,300 in 2007 to 729,700 in 2008; a reverse of 2007 vs. 2006 which saw a year on year increase of 1.5%.

Figure 1 Total visitor volume 2004-2008

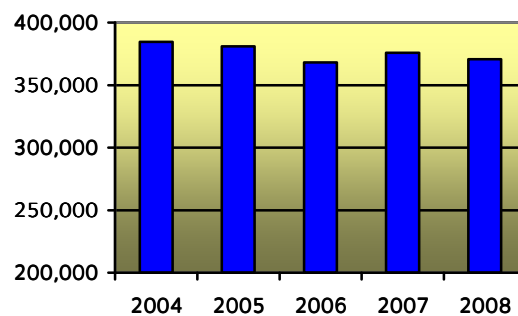


A full breakdown of total visitor numbers can be found in **Appendix 1** in the 2008 Annual Report at www.jersey.com/marketinginfo.

1.3 Staying Leisure Visitors Estimates

Figure 2 below shows how total staying leisure visitor volume decreased by 1.4% from 375,900 in 2007 to 370,700 in 2008.

Figure 2 Staying leisure visitor volume 2004-2008



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

1.4 Visitors Staying with Friends and Relatives (VFR)

The number of visitors staying with friends and relatives increased by 2.9% from 81,700 in 2007 to 84,100 in 2008. In addition to this, 4.6% 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 2008).

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 2008

UK	66,820
France	3,560
Ireland	3,320
Other CI	1,790
USA	900
Poland	750
Australia	600
Spain	620
Portugal	750
Canada	500
Other	4,450

Those staying with friends and relatives spend slightly longer in Jersey than visitors in paid accommodation, with an average length of stay in 2008 of 6 nights. The VFR market therefore accounted for 506,000 bed nights in Jersey in 2008.

1.5 Language Students

Visiting language student numbers increased by 28% from 2,230 in 2007 to 2,850 in 2008.

Language students in 2008 are estimated to have stayed in Jersey for an average of 13 nights, with the total market accounting for 36,000 nights. The majority of students stay with host families which puts a constraint upon the maximum size the language student market can achieve.

1.6 Business Visitors

The business market was estimated to have increased by 1.5% from 104,000 in 2007 to 105,500 in 2008.

In 2008 the number of staying (one or more nights) business visitors decreased by 6.5% to 67,310, with business day visits increasing by 19% to 38,220.

The decrease in staying business visitor volume, coupled with a slight increase in average stay accounted for 155,000 bed nights sold, 2.2% less than in 2007.

1.7 Visiting Conference Delegates

Residential conference delegate numbers decreased by 5% from 9,700 in 2007 to 9,200 in 2008.

The number of conferences decreased by 3% from 311 in 2007 to 303 in 2008. The number of Corporate delegates was 5,440 while the number of Association delegates was 3,750.

However, the number of bednights sold increased by 26% from 29,000 in 2007 to 36,450 in 2008.

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

1.8 Visiting Yachtsman

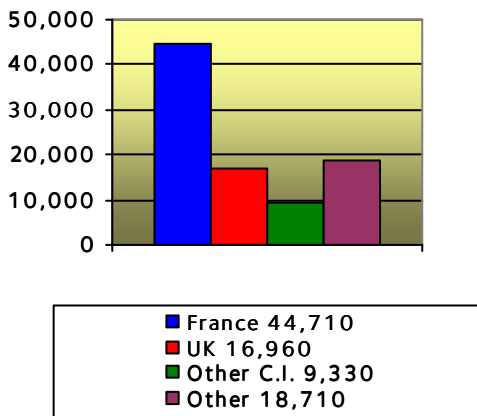
The number of visiting yachtsmen decreased by 6% from 21,100 in 2007 to 19,900 in 2008, staying an average of 2.4 nights, the same as in 2007.

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

1.9 Leisure Day Trips

Leisure day trip visits decreased by 5% from 94,100 in 2007 to 89,700 in 2008.

Figure 3
Breakdown of leisure day trip visitors by market



1.10 Visitor Expenditure Estimates

Total on-Island expenditure in 2008 is estimated at £238 million.

In real terms, if the total 2007 expenditure figures are reflatd to 2008 values, tourism expenditure in Jersey in 2008 decreased by 2.6%.

Table 2 shows a breakdown of estimated on-Island visitor expenditure by visitor type 2008 vs. 2007.

Table 2 Total Spend 2008 vs. 2007

	2007 Value of Market 000's	2008 Value of Market 000's	% Change Value of Market
Staying Leisure Visitors	£160,356	£161,363	1%
Visiting friends/relatives	£20,291	£22,172	9%
Language students	£1,531	£2,031	33%
Leisure Daytrippers	£4,504	£4,523	0%
Visiting yachtsmen	£1,929	£1,958	1%
Business visitors	£25,530	£26,610	4%
Conference delegates	£5,326	£5,489	3%
Other visitors	£14,569	£14,107	-3%
Total Spend	£234,036	£238,253	2%

N.B. 2007 figures are not reflatd.

Table 3 shows a breakdown of estimated on-Island visitor expenditure per visitor by visitor type 2008 vs. 2007.

Table 3 Spend per Visitor 2008 vs. 2007

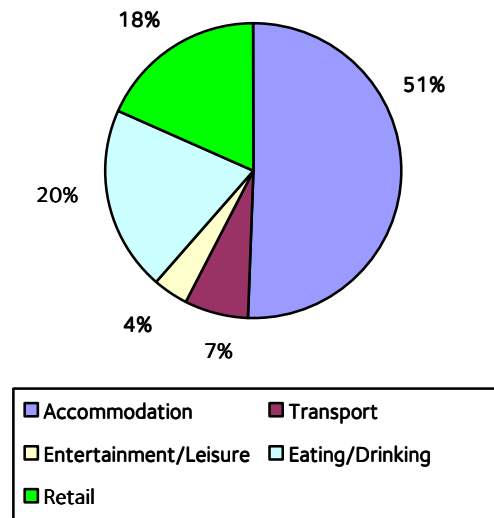
	2007 Spend per Visitor	2008 Spend per Visitor	% Change Value of Market
Staying Leisure Visitors	£427	£435	2%
Visiting friends/relatives	£248	£264	6%
Language students	£687	£713	4%
Leisure Daytrippers	£48	£50	5%
Visiting yachtsmen	£92	£98	7%
Business visitors	£245	£252	3%
Conference delegates	£550	£597	9%
Other visitors	£288	£295	3%
Average Spend per Visitor	£317	£327	3%

N.B. 2007 figures are not reflatd.

Breakdown of on-Island visitor spend 2008

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 2008 - £238m



The above shows that more than half (51%) of visitor expenditure is on the accommodation element of a stay in Jersey, although this percentage is reduced by visitors who do not stay in paid accommodation (VFR, day trips etc.). 20% of visitor expenditure is spent in restaurants, pubs and cafés, 7% on on-Island transport, and 18% on miscellaneous items which are mainly retail.

Visitor expenditure estimates are based upon the most recent visitor expenditure survey undertaken in 2007, but related to 2008 using Jersey's RPI.

1.11 Tax Revenue

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

Table 4. Tax revenues from companies

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

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

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

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

Tax revenue figures for previous years have not been reflated for direct comparison with 2006.

2. Profile of Staying Leisure Visitors

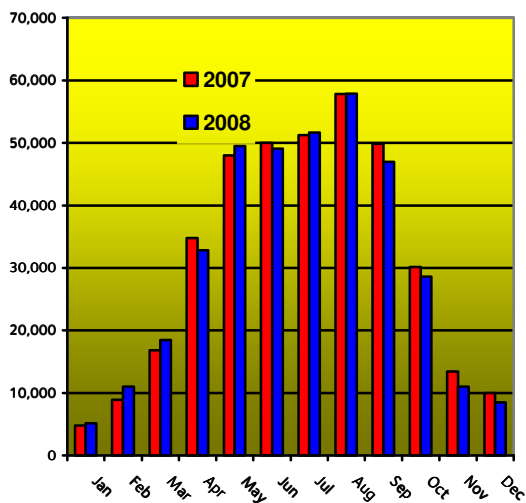
The following tables concentrate on **staying leisure visitor** trends, with the data derived from those visitors staying in registered accommodation that filled in visitor cards and stated that their main purpose of visit was “holiday” or “sport”.

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 the months of April, June, and September through to December showed decreased volumes of staying leisure visitors compared to the same months in 2007.

Figure 5 Staying leisure visitor arrivals by month 2007 and 2008.



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 – 2008 party composition.

	Adults (over 16)	Children (under 16)	Total Visitors
UK	268,260	21,090	289,350
Ireland	5,340	550	5,890
Other CI	15,150	1,700	16,850
France	28,820	3,990	32,810
Germany	8,670	380	9,050
Benelux	4,380	420	4,800
Other	11,330	570	11,900
Total	341,950	28,700	370,650

In 2008, children accounted for over 8% of total staying leisure visitors, the same percentage as in 2007 and 2006.

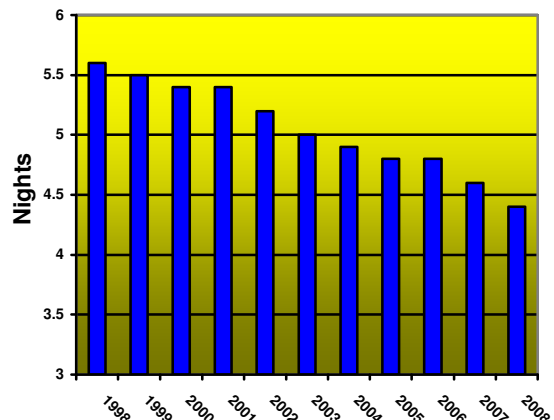
2.3 Average Length of Stay

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***

The following graph illustrates the overall trend from 1998 to 2008.

Figure 6 Staying leisure visitors – average stay 1998–2008

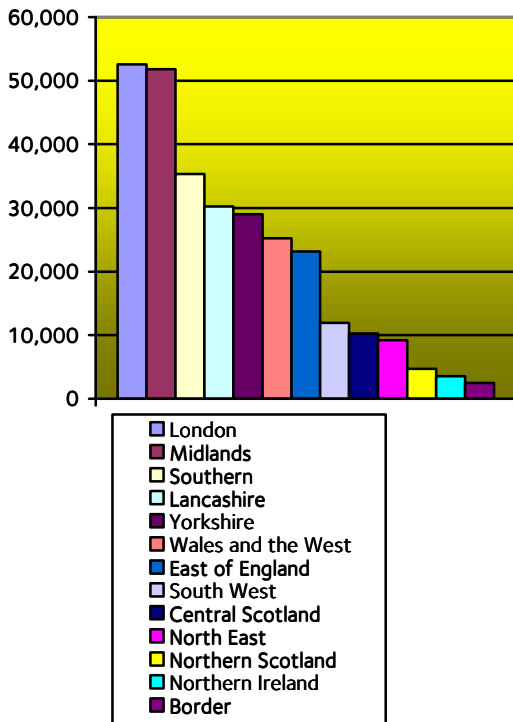


2.4 Region of Residence

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 2008.



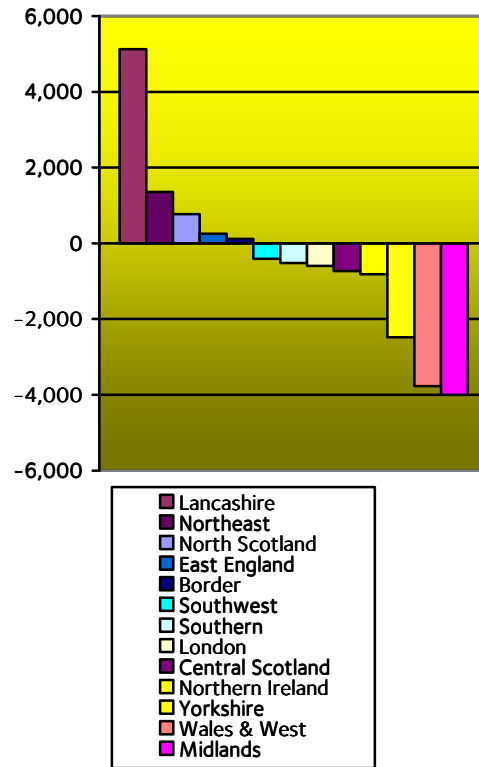
There have been some significant changes in the regional distribution of visitors by ISBA region between 2004 and 2008. These changes are partly reflective of the changes to capacity on certain routes and to some new routes being introduced, as well as being lost.

Table 6 and Figure 8 opposite show the changes in volumes of visitors by ISBA region between 2008 and 2007.

Table 6 Visitor volume changes 2008 vs. 2007

Lancashire	5,129
Northeast	1,353
North Scotland	768
East England	255
Border	117
Southwest	-407
Southern	-518
London	-594
Central Scotland	-729
Northern Ireland	-810
Yorkshire	-2,487
Wales & West	-3,767
Midlands	-3,997

Figure 8 Visitor volume changes 2008 vs. 2007



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 2008, 46% of Jersey's visitors came from the London, Midlands, and Southern regions.

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

2.4.2 France

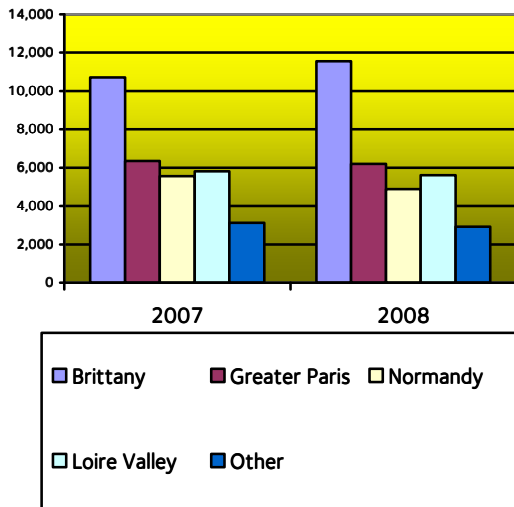
The first two digits of French postcodes from returned visitor registration cards have also been captured so that a continuous monitor of visitors from French Départements has been possible. Départements are grouped into French regions.

Table 7 and Figure 9 show the distribution of French staying leisure visitors between 2007 and 2008.

Table 7 French visitors by region 2008 vs. 2007

	2007	2008	Change 08/07	Change 08/07
Brittany	10,710	11,550	8%	840
Greater Paris	6,350	6,200	-2%	-150
Normandy	5,560	4,890	-12%	-670
Loire Valley	5,810	5,610	-3%	-200
South East	940	850	-9%	-90
South West	910	820	-10%	-90
Other	3,120	2,920	-7%	-200
Total	33,400	32,810	-2%	-590

Figure 9 French visitors by region 2007 vs. 2008



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

2.5 MOSAIC Profile of UK Staying Leisure Visitors

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

Table 8 shows the geo-demographic profile of visitors to Jersey 2008. The higher the index figure (this is the proportion of Jersey visitors compared to the UK population for each Mosaic Group), the more likely Jersey is to attract visitors from a particular Mosaic group.

Table 8 Mosaic groups of UK visitors 2008

Group	% Households	Jersey Visitors	Index 2008
Symbols of Success	9.6%	18.6%	1.9
Happy Families	10.8%	12.3%	1.1
Suburban Comfort	15.1%	21.9%	1.5
Ties of Community	16.0%	12.2%	0.8
Urban Intelligence	7.2%	0.4%	0.1
Welfare Borderline	6.4%	1.7%	0.3
Municipal Dependency	6.7%	2.1%	0.3
Blue Collar Enterprise	11.0%	7.0%	0.6
Twilight Subsistence	3.9%	2.0%	0.5
Grey Perspectives	7.9%	9.2%	1.2
Rural Isolation	5.4%	7.9%	1.5

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

2.6 Additional Visitor Profiling

The most notable points from the tables are that:

- In 2008 average length of stay fell from 4.6 nights in 2007 to 4.4 nights in 2008. Average stay for UK visitors fell from 4.9 nights in 2007 to 4.8 nights in 2008.
- After several years of decline in the percentage of people booking their holiday through a tour operator, 2006 and 2007 saw increases. In 2008 the percentage choosing this method of booking was 53%, the same as for 2007.
- After many years of decline, the percentage of first time visitors increased in 2004 to 44% and has since increased to 46% in 2008.
- In 2008 there was a decrease in the proportion of visitors booking at shorter notice. 33% of visitors booked less than one month before arrival compared to 36% in 2007.
- Between 2004 and 2008 the percentage of staying leisure visitors travelling by air to Jersey has consistently hovered around the 70-73% mark. In 2008 72% of staying leisure visitors travelled to Jersey by air.
- There had been a gradual increase in the average age or age profile of staying leisure visitors in previous years. This trend reversed in 2003 with the overall average adult age dropping to 52 years 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***

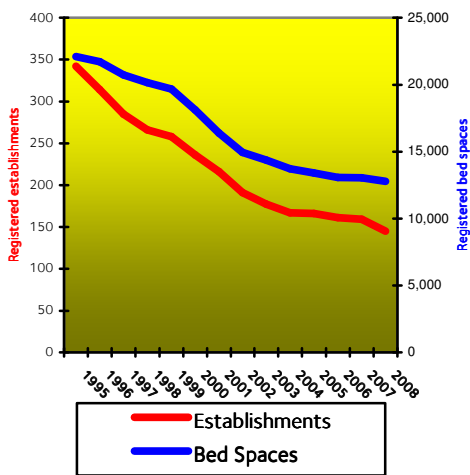
3. Registered Bed Stock

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.

Figure 10 Registered establishments and bed spaces 1995 -2008



In 2008, Jersey had 145 registered establishments, representing over 12,770 tourist bed spaces. Hotels accounted for 76% of the total bed stock in 2008.

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 88 in 2008.

Figure 11 Distribution of bed spaces 1995-2008

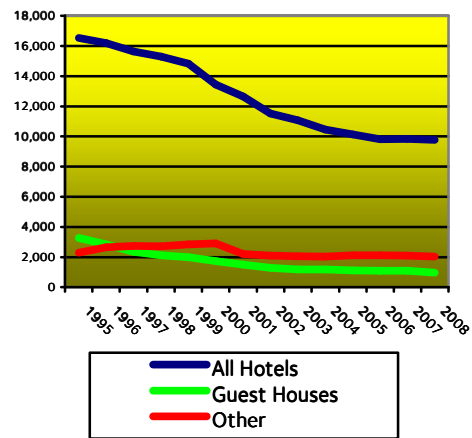
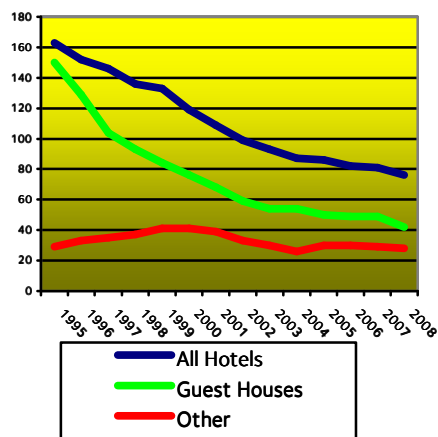


Figure 12 Distribution of establishments 1995-2008



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

4. Accommodation Performance Indicators

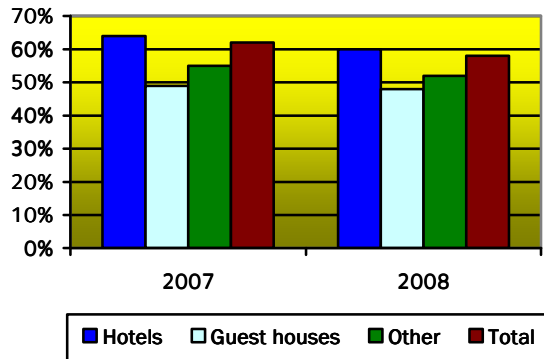
This section shows the performance in terms of bed and room nights sold, and occupancy levels achieved in the accommodation sector.

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

4.1 Bed Occupancy

By taking into account Jersey's total beds available (open), and comparing the estimated numbers of staying visitors and their respective lengths of stay, shows the following estimates for total bed space occupancy 2008 vs. 2007.

Figure 13 Bed space occupancy 2008 vs.2007

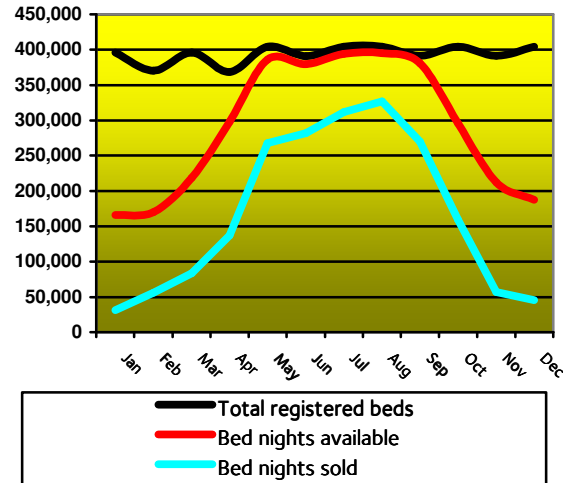


In 2008, total bed space occupancy averaged 58%, compared to 62% in 2007. Bed nights sold in all accommodation decreased slightly to 2,031,000 and total bed night availability rose slightly to 3,486,000.

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 - 2008

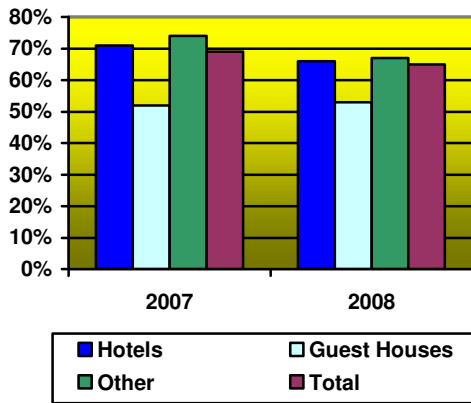


4.2 Room Occupancy

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

By taking into account Jersey's total room capacity, and comparing the estimated numbers of staying visitors and their respective lengths of stay, the following shows estimates for total room occupancy 2008 vs. 2007.

Figure 15 Room space occupancy 2008 vs 2007



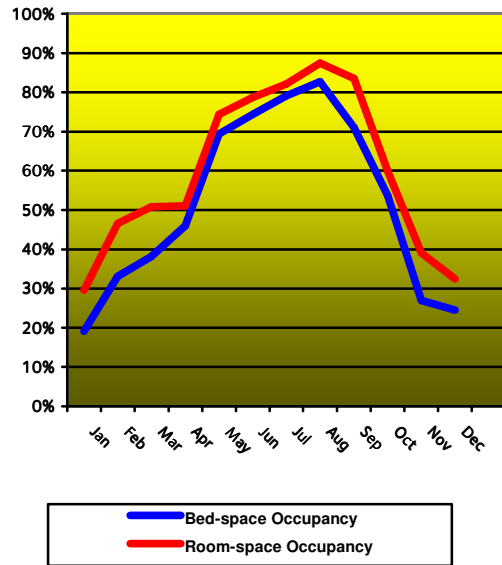
In 2008 total room occupancy averaged 65%, compared to 69% in 2007. Rooms sold in all accommodation decreased slightly to 1,004,000 while total rooms available increased slightly to 1,549,000.

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

4.3 Room vs. Bed Occupancy

Figure 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 room sales compared to staying leisure visitors.

Figure 16 Bed and room occupancy 2008



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 2008, 116 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 2008 vs. 2007

Number of bookings	2007	2008	08 vs, 07
Hotels	3,332	2,374	-29%
Guest Accommodation	2,467	1,831	-26%
Self Catering	148	144	-3%
Camping	13	0	-100%
TOTAL	5,960	4,349	-27%

Number of visitors	2007	2008	08 vs, 07
Hotels	7,110	4,972	-30%
Guest/Acc	5,215	3,779	-28%
S/C	429	429	0%
Camping	48	0	-100%
TOTAL	12,802	9,180	-28%

Number of bednights	2007	2008	08 vs, 07
Hotels	22,798	16,220	-29%
Guest/Acc	16,506	12,045	-27%
S/C	2,542	2,176	-14%
Camping	221	0	-100%
TOTAL	42,067	30,441	-28%

Revenue	2007	2008	08 vs, 07
Hotels	£973,418	£709,695	-27%
Guest/Acc	£489,390	£375,778	-23%
S/C	£66,777	£60,073	-10%
Camping	£2,726	£0	-100%
TOTAL	£1,532,311	£1,145,546	-25%

The above tables show a 27% fall in bookings, resulting in a 28% fall in visitors and bednights sold through the system. Revenue in 2008 decreased 25% to £1,145,546 compared to 2007, producing an average per person per night rate of £37.63, an increase on 2007 of £1.20. Average party size remained at 2.1 people, and average stay remained at 3.3 nights in 2008. Average length of stay is significantly less for Jersey Link bookings than the overall staying leisure visitor average of 4.4 nights.

Jersey Link bookings accounted for over 1% of total bed nights sold in 2008, compared to over 2% in 2007.

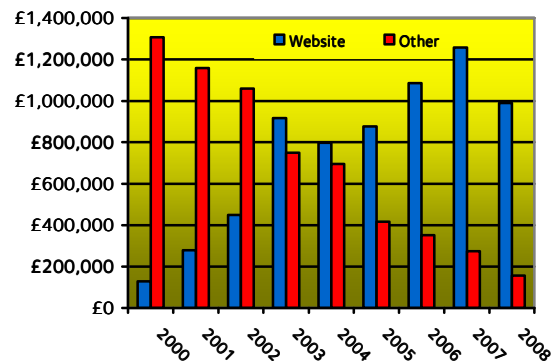
The above table also demonstrates the importance of Jersey Link to the guest house sector, where the number of bookings is disproportionate to the number of beds represented within the sector.

5.2 Jersey Link Bookings on the Internet

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

The average revenue per internet booking was £285 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 – 2008



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

6. Internet Usage

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

6.1 www.jersey.com

Jersey Tourism has its own website, www.jersey.com, which went live in March 1999. A new version of the site was launched in April 2008, and the software that tracks site usage was upgraded. As such, a 2008 vs. 2007 year on year comparison of unique visitors becomes redundant due to the way in which data is collected.

In 2008, there were over 1.25 million * "Total Unique Visitors" (visitors identified by PC IP address and cookies, excluding any repeat visits) to the site.

** Data covering the period 20/11/08 to 31/12/08 is not included in this figure due to reporting difficulties that had not been resolved prior to publication.*

6.2 Internet usage by Jersey visitors

Table 10 Internet usage by Jersey staying leisure visitors, 2000 - 2008

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

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

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

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

NB. The 2008 survey was for UK visitors only.

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

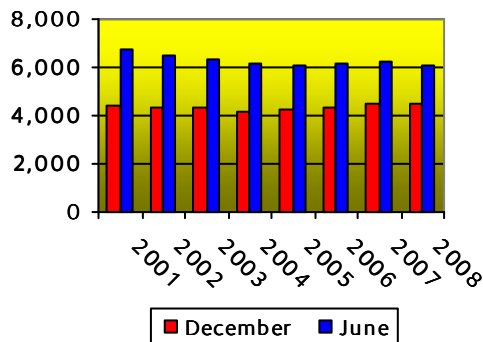
7. Employment in the Hospitality Sector

The figures within this section are provided by the 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 2008. From 2001 to 2004 the underlying trend in employment had been downward, but the rate of decline slowed, and in both 2006 and 2007 employee numbers increased slightly. There was however a small decrease in 2008 of 150.

Figure 20 Total staff employed in the hospitality sector 2001 - 2008



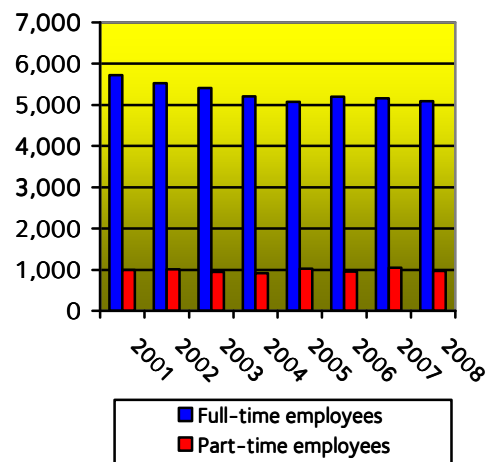
The difference between the number of staff employed in June 2008 and December 2007, some 1,550, would indicate the seasonal nature of tourism employment. The equivalent figure in 2007 was 1,850. These figures would appear to reflect the decrease in the rate of fall in the number of tourism establishments and beds.

Measured against staff employed in all sectors, the percentage attributable to the hospitality sector has fallen from 17% in June 1997 to 13% in June 2008. The total number of staff employed in the hospitality sector decreased by 150 between June 2007 and June 2008. 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 has been 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 and 5,090 in 2008.

In 2001 full-time employees accounted for 85% of all those employed in hotels, restaurants and bars, compared to 83% in 2008.

Figure 21 Full-time vs. part-time posts (June) 2001 - 2008



Source: Statistics Unit, Policy and Resources Department

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

8. Passenger Arrivals

In 2008, passenger arrivals through Jersey's airport and harbour terminals decreased by just over 4,500 (-0.4%) compared to 2007 to a total of 1,161,000.

Figure 22 details a breakdown of arrivals by air and sea against the total for each year. 2008 saw an increase in arrivals by air of 2.4% (+18,800), and a decrease in arrivals by sea of 6.1% (-23,300).

Figure 22 Total passenger arrivals 2001 – 2008

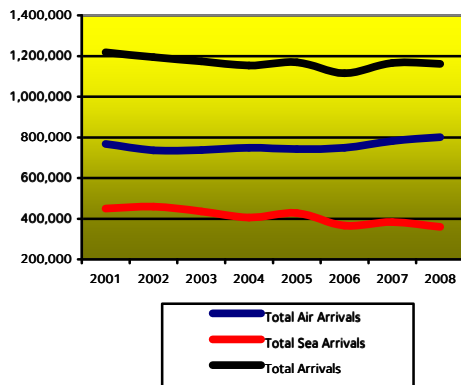
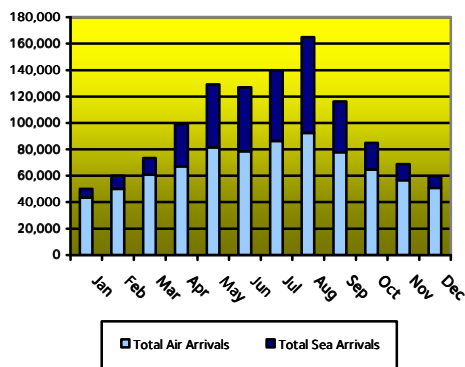


Figure 23 shows arrivals by month during 2008. The pattern of higher arrivals during the summer months reflects the seasonality of the "tourist" season.

Figure 23 Total air & sea arrivals by month for 2008.



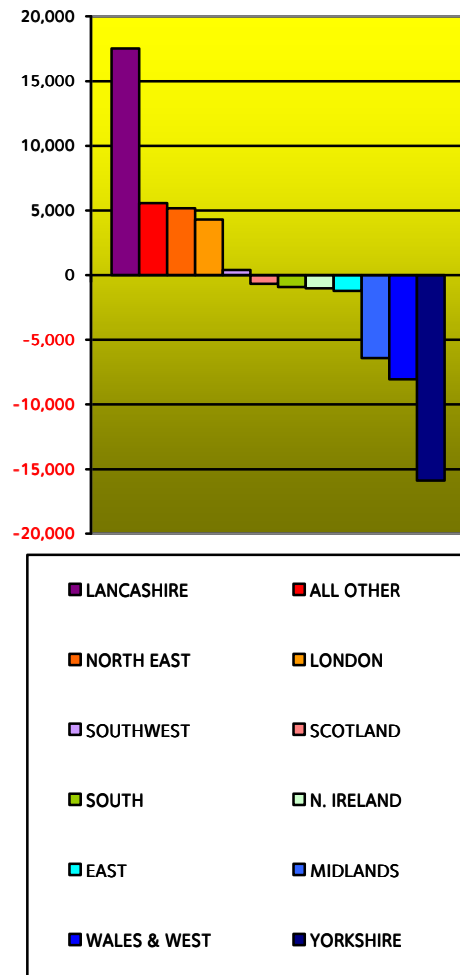
As in recent years, 2008 again saw some significant changes in arrivals patterns.

There was also a significant change in arrivals by air from the UK by region. The introduction of the Liverpool service saw Lancashire airports increase in passenger volume by over 17,500.

The re-introduction of the Leeds/Bradford route did not offset the loss of the Doncaster route, resulting in a fall of nearly 16,000 arrivals from Yorkshire.

Figure 24 illustrates the impact of operators in 2008 vs. 2007 by region.

Figure 24 Changes in arrivals by region 2008 vs. 2007



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

9. Guide to Data Sources and Notes

Figures

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

Seasons

Where seasons are referred to, the following is applied:

Spring = April, May and June

Summer = July and August

Autumn = September and October

Winter = November, December, January, February and March

Passenger arrivals

Detailed monthly passenger arrivals figures by route are provided by Jersey Airport and 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 44,000 departing passengers, representing 100,000 (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 Surveys 2006 and 2008

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

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

Employment figures

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

Registered bed stock

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

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

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

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

Other Sources used within the 2008 Annual Report.

Jersey Conference Bureau
www.jerseyconferences.co.uk

Jersey Met Office
www.jerseymet.gov.je

Jersey Harbours
www.jersey-harbours.com

Statistics Unit
www.gov.je/ChiefMinister/Statistics

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

Appendix 1

VISITOR VOLUMES 1992 - 2008

	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	Change 08/07	Average '04-'08
STAYING HOLIDAY/LEISURE VISITORS																			
UK	474,020	474,950	449,960	444,040	451,190	462,000	425,290	404,010	379,420	359,240	320,270	302,420	306,760	300,900	289,200	295,040	289,360	-1.9%	296,252
IRELAND	9,150	9,580	9,900	11,500	14,250	15,470	12,710	12,890	11,460	9,010	6,860	6,950	5,140	5,600	4,990	4,160	5,900	41.8%	5,158
OTHER CI	8,020	8,160	9,120	10,080	13,000	13,350	12,710	13,440	13,190	14,120	15,130	15,380	15,180	16,770	15,260	15,320	16,850	10.0%	15,876
FRANCE	44,520	45,070	39,380	41,430	41,770	39,060	32,930	31,520	30,680	27,490	28,210	29,300	29,960	31,370	31,450	33,400	32,810	-1.8%	31,798
GERMANY	10,420	15,210	16,880	17,350	17,260	16,630	15,600	16,840	15,330	10,480	9,700	8,960	10,240	9,460	10,680	9,640	9,050	-6.1%	9,814
NORWAY	4,090	6,490	6,260	6,850	9,700	9,700	5,240	3,960	3,710	2,080	1,270	810	790	650	470	460	830	60.4%	640
SWEDEN	15,380	13,810	11,620	7,900	5,870	6,100	5,040	2,480	1,800	1,380	1,200	560	960	900	1,210	1,140	950	-16.7%	1,032
NETHERLANDS	4,060	6,020	5,430	4,890	6,180	5,520	5,130	5,440	5,160	3,650	3,520	3,520	3,660	3,450	3,420	3,940	3,030	-23.1%	3,500
BELGIUM	2,220	3,030	3,880	3,180	3,530	4,180	3,790	4,320	3,050	2,720	2,240	2,280	2,760	2,730	2,100	2,070	1,770	-14.5%	2,286
SWITZERLAND	2,580	3,310	3,760	3,600	3,810	3,200	3,570	3,270	2,900	2,450	2,270	1,830	2,020	2,030	1,820	1,900	1,850	-2.6%	1,924
FINLAND	510	200	2,340	2,370	2,560	2,530	2,590	380	520	260	190	90	130	100	440	180	110	-38.9%	192
DENMARK	1,670	1,560	1,530	1,350	1,890	1,710	1,410	1,290	1,040	680	600	380	410	440	490	430	430	0.0%	440
AUSTRIA	170	550	840	790	870	1,370	1,550	1,780	1,010	890	700	560	550	380	530	600	600	-36.8%	602
SPAIN	280	340	300	300	340	450	320	260	320	320	420	340	290	380	370	390	360	-7.7%	358
PORTUGAL	130	220	320	340	310	270	290	270	360	280	350	300	170	260	90	230	250	8.7%	200
ITALY	360	480	420	500	310	420	390	380	330	240	380	290	240	230	210	330	240	-27.3%	250
CANADA	1,320	1,380	1,430	1,820	1,910	1,740	1,590	1,220	1,330	970	780	690	720	610	680	730	730	0.0%	694
USA	1,390	1,770	1,380	1,450	1,860	1,900	1,810	1,870	1,700	1,490	1,300	1,160	1,120	1,170	1,090	1,130	900	-20.4%	1,082
AUSTRALIA ¹								810	1,280	1,100	930	720	970	890	880	1,020	1,060	3.9%	964
OTHER	3,280	3,310	3,250	3,520	4,140	4,890	3,830	2,740	2,940	2,710	2,390	2,310	2,470	2,610	2,780	3,400	3,580	5.3%	2,968
TOTAL STAYING LEISURE ²	583,570	595,440	568,000	563,260	580,750	590,490	533,790	509,170	477,530	441,360	398,710	378,850	384,540	380,930	368,160	375,860	370,660	-1.4%	376,030
VISITING FRIENDS/RELATIVES ³																			
LANGUAGE STUDENTS ⁴																			
BUSINESS VISITORS ⁵																			
CONFERENCE DELEGATES ⁶	18,420	14,870	17,410	12,300	8,320	15,130	16,330	13,220	16,030	13,020	13,890	4,250	5,480	5,920	8,780	9,690	9,190	-5.2%	7,812
VISITING YACHTSMEN ⁷					27,620	29,740	27,430	27,480	25,190	25,850	23,600	25,830	24,230	24,350	24,030	21,070	19,920	-5.5%	22,720
LEISURE DAYTRIPPERS ⁸																			
OTHER ⁹																			
TOTAL VISITORS							984,910	949,910	878,110	843,050	802,460	748,600	747,070	752,270	728,540	739,280	729,680	-1.3%	739,368

¹ Prior to 1999, Australia was classified within 'Other'.

² Staying leisure visitors are based upon returns of visitor registration cards and the 1997, 2003/4, 2005 and 2007 Travel Surveys and refer to those staying in paid accommodation.

³ VFR estimates refer to those staying with friends and relatives, and not those who stay in paid accommodation. The estimates are based upon the 1997, 2003/4, 2005 and 2007 Travel Surveys.

⁴ Language student numbers are based upon declarations from language schools.

⁵ Business visitor estimates are based upon returns of visitor registration cards and the 1997, 2003/4, 2005 and 2007 Travel Surveys.

⁶ Conference figures are supplied by the Jersey Conference Bureau.

⁷ Visiting yacht figures are supplied by the Jersey Harbours.

⁸ Leisure day trips are estimated from the results of the 1997, 2003/4, 2005 and 2007 Travel Surveys.

⁹ 'Other' may refer to business or leisure visits (e.g. stag/then parties, specific events, concerts, deliveries, visiting bands, weddings, school parties etc.).

Appendix 2

BREAKDOWN OF ON-ISLAND VISITOR EXPENDITURE ESTIMATES BY SOURCE MARKET FOR 2007 AND 2008

	2007		2008		2008 vs. 2007	
	Spend per Visitor	Value of Market €000's	Spend per Visitor	Value of Market €000's	% Change Spend per Visitor	% Change Value of Market
Staying Holiday/Leisure Visitors						
UK	£455	£134,182	£464	£134,395	2%	0%
Ireland	£537	£2,235	£520	£3,066	-3%	37%
Other C.I.	£259	£3,975	£268	£4,513	3%	14%
France	£216	£7,212	£230	£7,540	6%	5%
Germany	£497	£4,794	£499	£4,516	0%	-6%
Benelux	£414	£2,491	£420	£2,014	1%	-19%
Other	£445	£5,467	£447	£5,320	1%	-3%
Staying Leisure Total ¹	£427	£160,356	£435	£161,363	2%	1%
Visiting friends/relatives ¹	£248	£20,291	£264	£22,172	6%	9%
Language students ²	£687	£1,531	£713	£2,031	4%	33%
Daytrippers - French	£47	£2,202	£49	£2,196	5%	0%
Daytrippers - UK	£39	£706	£41	£703	6%	0%
Daytrippers - Other C.I.	£94	£911	£98	£913	4%	0%
Daytrippers - Other	£36	£686	£38	£712	6%	4%
Daytrippers - Total ¹	£48	£4,504	£50	£4,523	5%	0%
Visiting yachtsmen ³	£92	£1,929	£98	£1,958	7%	1%
Business - Day visitors	£58	£1,859	£62	£2,368	7%	27%
Business - Staying visitors	£329	£23,671	£360	£24,242	9%	2%
Business visitors - Total ¹	£245	£25,530	£252	£26,610	3%	4%
Conference - Association	£351	£298	£627	£2,350	78%	687%
Conference - Corporate	£569	£5,027	£577	£3,139	1%	-38%
Conference delegates - Total ⁴	£550	£5,326	£597	£5,489	9%	3%
Other - Day visitors	£74	£1,164	£77	£1,205	5%	4%
Other - Staying visitors	£384	£13,405	£402	£12,902	4%	-4%
Other visitors - Total ¹	£288	£14,569	£295	£14,107	3%	-3%
Total Visitors	£317	£234,036	£327	£238,253	3%	2%

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

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

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

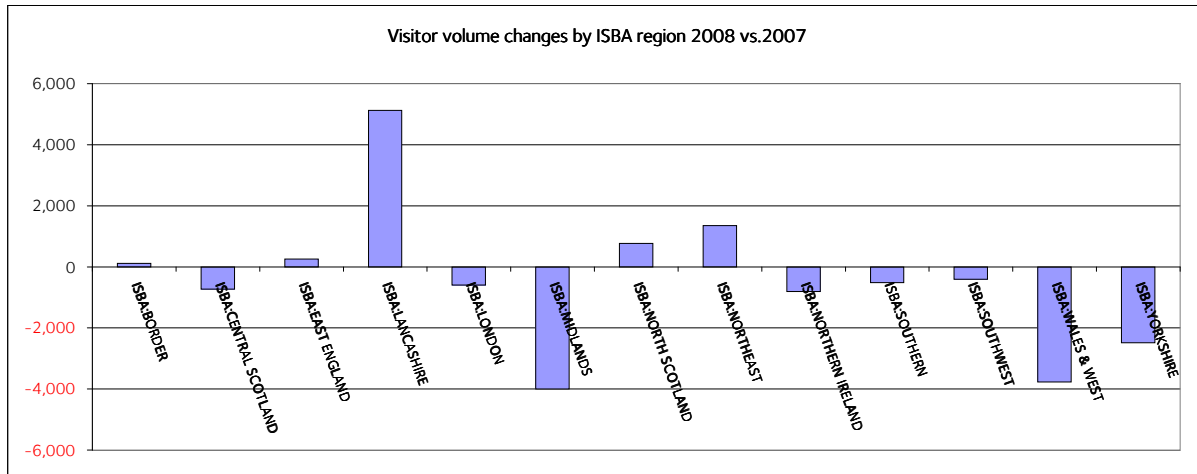
⁴ Expenditure is calculated by using results from the 2007 Jersey Travel Survey and research into conference delegate rates and applying RPI increases.

N.B. 2007 figures are at 2007 prices.

Appendix 3 UK Staying Leisure Visitors by ISBA Region 2004 - 2008

REGION	UK Households	2004	Market	2005	Market	2006	Market	2007	Market	2008	Market	% Change	Vol. Change	2008
			Share		Share		Share		Share		Share	08/07	08/07	Index
ISBA:BORDER	1.2%	2,761	1%	2,500	1%	2,400	1%	2,330	1%	2,447	1%	5.0%	117	0.66
ISBA:CENTRAL SCOTLAND	6.3%	10,737	4%	10,770	4%	10,353	4%	10,980	4%	10,251	4%	-6.6%	-729	0.59
ISBA:EAST ENGLAND	6.7%	20,553	7%	22,330	7%	21,459	7%	22,920	8%	23,175	8%	1.1%	255	1.16
ISBA:LANCASHIRE	11.6%	29,449	10%	28,800	10%	27,676	10%	25,080	9%	30,209	10%	20.5%	5,129	0.73
ISBA:LONDON	19.4%	57,057	19%	50,040	17%	48,094	17%	53,200	18%	52,606	18%	-1.1%	-594	0.93
ISBA:MIDLANDS	15.4%	57,671	19%	56,570	19%	54,370	19%	55,850	19%	51,853	18%	-7.2%	-3,997	1.23
ISBA:NORTH SCOTLAND	2.1%	3,988	1%	3,910	1%	3,760	1%	3,920	1%	4,688	2%	19.6%	768	0.63
ISBA:NORTHEAST	5.1%	9,510	3%	12,430	4%	11,944	4%	7,820	3%	9,173	3%	17.3%	1,353	0.52
ISBA:NORTHERN IRELAND	2.4%	4,908	2%	4,690	2%	4,512	2%	4,340	1%	3,530	1%	-18.7%	-810	0.61
ISBA:SOUTHERN	9.2%	41,413	14%	37,340	12%	35,890	12%	35,820	12%	35,302	12%	-1.4%	-518	1.32
ISBA:SOUTHWEST	3.0%	13,497	4%	13,060	4%	12,551	4%	12,300	4%	11,893	4%	-3.3%	-407	1.39
ISBA:WALES & WEST	7.7%	29,142	10%	25,760	9%	24,756	9%	28,970	10%	25,203	9%	-13.0%	-3,767	1.28
ISBA:YORKSHIRE	9.9%	25,768	8%	32,710	11%	31,436	11%	31,510	11%	29,023	10%	-7.9%	-2,487	1.08
TOTAL		306,760		300,900		289,200		295,040		289,360		-1.9%	-5,680	

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 2004-2008

	2004	% market share	2005	% market share	2006	% market share	2007	% market share	2008	% market share	Change 08/07	Average 2004-2008
BRITTANY	9,310	31%	10,660	34%	9,910	32%	10,710	32%	11,549	35%	8%	10,428
GREATER PARIS	6,480	22%	6,590	21%	6,260	20%	6,350	19%	6,201	19%	-2%	6,376
NORMANDY	4,310	14%	4,390	14%	5,220	17%	5,560	17%	4,889	15%	-12%	4,874
LOIRE VALLEY	5,210	17%	5,650	18%	5,630	18%	5,810	17%	5,611	17%	-3%	5,582
SOUTH EAST	950	3%	940	3%	880	3%	940	3%	853	3%	-9%	913
SOUTH WEST	900	3%	940	3%	820	3%	910	3%	820	3%	-10%	878
MEDITERRANEAN	640	2%	630	2%	570	2%	650	2%	656	2%	1%	629
POITOU-CHARENTES	490	2%	630	2%	570	2%	660	2%	558	2%	-15%	582
NORTH EAST	460	2%	630	2%	440	1%	470	1%	459	1%	-2%	492
NORTH	480	2%	630	2%	440	1%	490	1%	394	1%	-20%	487
PICARDY	290	1%	310	1%	380	1%	380	1%	492	2%	30%	370
BURGUNDY	200	1%	160	1%	190	1%	240	1%	197	1%	-18%	197
CHAMPAGNE	230	1%	160	1%	160	1%	230	1%	164	1%	-29%	189
TOTAL	29,960		31,370		31,450		33,400		32,810		-2%	31,798

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

MOSAIC profile of UK Staying Leisure Visitors 2006 - 2008

Type	Group	% Households	Type Description	% Households	2006	2007	2008	Index 2008
1	Symbols of Success	9.6%	Global Connections	0.7%	0.5%	0.7%	0.8%	1.1
2			Cultural Leadership	0.9%	1.1%	1.3%	1.4%	1.5
3			Corporate Cheifains	1.1%	2.5%	2.7%	2.7%	2.4
4			Golden Empty Nesters	1.3%	3.0%	3.0%	2.9%	2.2
5			Provincial Privilege	1.7%	3.1%	3.2%	3.2%	1.9
6			High Technologists	1.8%	3.9%	3.8%	3.8%	2.1
7			Semi-rural Seclusion	2.0%	3.6%	3.8%	3.9%	1.9
8	Happy Families	10.8%	Just Moving In	0.9%	0.1%	0.4%	0.4%	0.5
9			Fledgling Nurseries	1.2%	1.5%	1.5%	1.5%	1.3
10			Upscale New Owners	1.4%	2.4%	2.5%	2.4%	1.8
11			Families Making Good	2.3%	2.9%	2.9%	2.9%	1.2
12			Middle Ring Families	2.9%	3.6%	3.5%	3.5%	1.2
13			Burdened Optimists	2.0%	1.4%	1.4%	1.5%	0.7
14			In Military Quarters	0.2%	0.1%	0.1%	0.1%	0.7
15	Suburban Comfort	15.1%	Close to Retirement	2.8%	5.3%	5.3%	5.2%	1.8
16			Conservative Values	2.8%	4.8%	4.6%	4.5%	1.6
17			Small Time Business	2.9%	4.5%	4.4%	4.4%	1.5
18			Sprawling Subtopia	3.1%	4.0%	4.0%	4.0%	1.3
19			Original Suburbs	2.4%	3.3%	3.4%	3.3%	1.4
20			Asian Enterprise	1.0%	0.4%	0.5%	0.5%	0.5
21			Respectable Rows	2.7%	2.7%	2.5%	2.6%	1.0
22	Ties of Community	16.0%	Affluent Blue Collar	3.1%	4.1%	4.0%	4.0%	1.3
23			Industrial grit	3.8%	3.2%	3.1%	3.0%	0.8
24			Coronation Street	2.8%	1.2%	1.1%	1.1%	0.4
25			Town Centre Refuge	1.1%	0.7%	0.7%	0.7%	0.6
26			South Asian Industry	0.9%	0.1%	0.1%	0.1%	0.1
27			Settled Minorities	1.6%	0.6%	0.6%	0.6%	0.4
28			Counter Cultural Mix	1.4%	0.5%	0.7%	0.7%	0.5
29	Urban Intelligence	7.2%	City Adventurers	1.3%	0.8%	1.0%	1.1%	0.8
30			New Urban Colonists	1.4%	1.2%	1.3%	1.4%	1.0
31			Caring Professionals	1.1%	0.8%	0.9%	0.9%	0.8
32			Dirky Developments	1.1%	0.6%	0.7%	0.7%	0.7
33			Town Govn Transition	0.8%	0.4%	0.4%	0.4%	0.5
34			University Challenge	0.3%	0.1%	0.1%	0.2%	0.6
35			Welfare Borderline	6.4%	0.7%	0.2%	0.2%	0.4
36	Municipal Dependency	6.7%	Metro Multiculture	1.7%	0.3%	0.4%	0.3%	0.4
37			Upper Floor Families	1.7%	0.4%	0.5%	0.5%	0.3
38			Tower Block Living	0.5%	0.1%	0.1%	0.1%	0.2
39			Dignified Dependency	1.3%	0.4%	0.4%	0.4%	0.3
40			Sharing a Staircase	0.5%	0.1%	0.1%	0.1%	0.2
41			Families on Benefits	1.2%	0.3%	0.3%	0.3%	0.2
42			Low Horizons	26.4%	0.8%	0.7%	0.8%	0.0
43	Blue Collar Enterprise	11.0%	Ex-Industrial Legacy	2.9%	1.2%	1.0%	1.0%	0.4
44			Rustbelt Resilience	3.0%	1.8%	1.5%	1.5%	0.5
45			Older Right to Buy	2.7%	2.0%	1.8%	1.8%	0.7
46			White Van Culture	3.2%	2.5%	2.5%	2.6%	0.8
47			New Town Materialism	2.2%	1.2%	1.1%	1.0%	0.5
48			Old People in Flats	0.8%	0.4%	0.3%	0.3%	0.4
49			Low Income Elderly	1.6%	1.2%	1.1%	1.1%	0.7
50	Grey Perspectives	7.9%	Cared for Pensioners	1.4%	0.7%	0.8%	0.8%	0.4
51			Seppie Memories	0.8%	0.6%	0.6%	0.6%	0.8
52			Childfree Serenity	1.3%	1.3%	1.3%	1.4%	1.0
53			High Spending Elders	1.5%	2.8%	2.7%	2.6%	1.7
54			Bungalow Retirement	1.3%	1.8%	1.7%	1.6%	1.3
55			Small Town Seniors	2.7%	2.9%	2.8%	2.8%	1.0
56			Tourist Attendants	0.3%	0.3%	0.3%	0.3%	0.8
57	Rural Isolation	5.4%	Summer Playgrounds	0.3%	0.3%	0.3%	0.3%	0.9
58			Greenbelt Guardians	1.7%	3.3%	3.4%	3.5%	2.0
59			Parochial Villagers	1.6%	1.9%	1.8%	1.9%	1.1
60			Pastoral Sympony	1.3%	1.8%	1.7%	1.8%	1.4
61			Upland Hill Farmers	0.4%	0.4%	0.4%	0.4%	1.0

MOSAIC is a geodemographic profiling system based upon UK postcodes.

This table shows the geo-demographic profile of visitors to Jersey between 2006 and 2008. The higher the index figure (this is the proportion of Jersey visitors compared to the UK population for each Mosak Group), the more likely Jersey is to attract visitors from a particular Mosaic group.

Appendix 6

Length of Stay and Average Stay - Profile of Staying Leisure Visitors 2004 - 2008

COUNTRY	Stay																								Average Stay			
	1 - 3 Nights						4 - 6 Nights						7 Nights						8+ Nights						Nights			
	2004	2005	2006	2007	2008		2004	2005	2006	2007	2008		2004	2005	2006	2007	2008		2004	2005	2006	2007	2008		2004	2005	2006	2007
UK	33%	33%	34%	36%	38%	22%	24%	26%	26%	25%	36%	35%	32%	30%	29%	9%	8%	8%	8%	7%	5.3	5.2	5.2	4.9	4.8			
IRELAND	29%	31%	29%	30%	35%	25%	28%	28%	26%	31%	39%	33%	35%	37%	29%	8%	8%	7%	7%	6%	5.4	5.2	5.1	5.2	4.8			
OTHER CI	93%	93%	94%	92%	93%	5%	5%	5%	7%	6%	1%	1%	1%	2%	1%	1%	1%	0%	0%	1%	1.9	1.8	2.0	1.9	1.9			
FRANCE	90%	90%	89%	89%	88%	8%	7%	8%	8%	8%	1%	2%	2%	2%	2%	1%	1%	1%	1%	2%	2.1	2.0	2.1	2.1	2.1			
GERMANY	25%	25%	21%	21%	24%	25%	23%	25%	27%	28%	32%	34%	36%	35%	32%	18%	18%	18%	17%	15%	6.1	6.1	6.3	6.1	5.9			
NORWAY	19%	39%	31%	34%	45%	22%	21%	43%	44%	34%	48%	22%	12%	10%	7%	11%	18%	13%	12%	14%	6.1	5.1	5.0	4.7	4.6			
SWEDEN	29%	27%	25%	25%	25%	59%	59%	66%	62%	64%	7%	9%	7%	9%	8%	5%	4%	3%	4%	4%	4.0	4.1	4.1	4.1	4.0			
HOLLAND	33%	29%	31%	34%	36%	27%	25%	28%	28%	29%	30%	35%	30%	29%	26%	10%	12%	11%	10%	9%	5.1	5.5	5.1	5.1	4.9			
BELGIUM	51%	48%	44%	57%	53%	27%	31%	36%	27%	31%	17%	16%	12%	10%	11%	5%	5%	8%	6%	5%	3.9	4.0	4.0	3.7	3.7			
SWITZERLAND	43%	41%	36%	41%	44%	25%	30%	29%	23%	27%	22%	22%	25%	26%	18%	10%	7%	10%	9%	11%	4.8	4.7	5.1	4.8	4.7			
FINLAND	70%	40%	80%	47%	38%	19%	39%	15%	27%	44%	2%	8%	2%	9%	8%	9%	12%	3%	16%	9%	3.7	4.6	3.4	4.5	4.4			
DENMARK	42%	36%	22%	45%	55%	41%	39%	29%	16%	35%	8%	16%	40%	31%	6%	10%	8%	9%	8%	4%	4.3	4.6	5.5	4.7	3.8			
AUSTRIA	52%	33%	53%	45%	50%	17%	26%	24%	32%	20%	17%	18%	12%	17%	20%	14%	23%	11%	7%	10%	4.6	5.9	4.7	4.5	4.6			
SPAIN	60%	52%	49%	60%	45%	23%	29%	33%	25%	36%	7%	8%	9%	5%	10%	10%	11%	9%	10%	9%	3.9	4.1	4.2	4.0	4.3			
PORTUGAL	43%	55%	47%	57%	47%	31%	17%	18%	13%	25%	13%	18%	22%	16%	14%	13%	10%	13%	14%	15%	5.0	4.9	4.5	4.4	4.7			
ITALY	54%	60%	55%	48%	46%	32%	19%	28%	32%	40%	6%	13%	7%	9%	6%	7%	7%	10%	11%	8%	3.7	3.7	4.1	4.2	4.3			
CANADA	38%	36%	41%	46%	45%	32%	37%	36%	27%	30%	15%	11%	13%	10%	10%	15%	17%	10%	17%	14%	5.3	5.2	5.0	5.1	4.8			
USA	61%	63%	59%	60%	53%	23%	24%	26%	28%	35%	11%	8%	8%	7%	6%	4%	6%	7%	5%	7%	3.5	3.5	3.9	3.5	3.9			
AUSTRALIA	55%	56%	56%	61%	56%	30%	30%	29%	26%	26%	8%	9%	9%	8%	7%	7%	5%	5%	5%	11%	3.9	3.7	4.2	3.6	4.1			
OTHER	55%	57%	51%	56%	58%	27%	25%	26%	24%	23%	10%	11%	12%	10%	7%	7%	7%	1%	10%	12%	3.8	5.9	4.6	4.1	4.1			
TOTAL	40%	40%	43%	45%	45%	21%	22%	23%	23%	23%	32%	30%	27%	26%	25%	8%	8%	7%	7%	7%	4.9	4.8	4.8	4.6	4.4			

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

Appendix 7

Travel & Booking Patterns – Profile of Staying Leisure Visitors 2004 – 2008

COUNTRY	% Tour Operator												% First Time Visitors												When booked												Travel													
	2004				2005				2006				2007				2008				2004				2005				2006				2007				2008				2004		2005		2006		2007		2008	
	2004	2005	2006	2007	2008	2004	2005	2006	2007	2008	2004	2005	2006	2007	2008	2004	2005	2006	2007	2008	2004	2005	2006	2007	2008	2004	2005	2006	2007	2008	2004	2005	2006	2007	2008	2004	2005	2006	2007	2008	2004	2005	2006	2007	2008					
UK	51%	49%	49%	51%	53%	41%	41%	41%	40%	43%	27%	28%	26%	31%	28%	36%	37%	38%	34%	37%	36%	37%	36%	34%	36%	37%	36%	36%	34%	36%	37%	36%	36%	34%	36%	78%	78%	78%	82%	82%	78%	78%	78%	82%	82%					
IRELAND	29%	31%	34%	40%	43%	45%	47%	44%	40%	46%	32%	39%	34%	35%	33%	37%	40%	44%	30%	39%	31%	31%	20%	22%	28%	31%	20%	22%	35%	28%	31%	20%	22%	35%	28%	96%	96%	96%	97%	97%	96%	96%	96%	97%	97%					
OTHER CI	44%	49%	53%	56%	50%	5%	6%	7%	8%	8%	68%	66%	56%	67%	62%	25%	27%	36%	23%	30%	7%	7%	7%	8%	9%	7%	7%	8%	9%	9%	49%	49%	42%	50%	50%	49%	49%	42%	50%	50%	49%	49%	42%	50%	50%					
FRANCE	65%	62%	66%	64%	61%	67%	65%	66%	66%	66%	65%	68%	61%	62%	61%	28%	26%	31%	28%	31%	7%	7%	5%	8%	9%	7%	5%	8%	9%	8%	4%	4%	4%	6%	5%	4%	4%	4%	6%	5%	4%	4%	4%	6%	5%					
GERMANY	65%	59%	59%	63%	62%	86%	85%	84%	83%	83%	26%	25%	27%	27%	23%	35%	36%	34%	33%	34%	40%	40%	39%	40%	42%	40%	39%	39%	40%	42%	54%	56%	56%	52%	53%	54%	56%	56%	52%	53%	54%	56%	56%	52%	53%					
NORWAY	33%	56%	36%	63%	38%	60%	65%	61%	66%	63%	39%	46%	33%	28%	26%	36%	42%	38%	40%	25%	25%	25%	12%	30%	49%	25%	12%	30%	32%	49%	90%	80%	78%	49%	72%	90%	80%	78%	49%	72%	90%	80%	78%	49%	72%					
SWEDEN	43%	39%	64%	67%	66%	62%	69%	75%	76%	70%	42%	52%	62%	61%	52%	41%	38%	22%	18%	21%	17%	17%	10%	16%	20%	17%	10%	16%	20%	27%	84%	68%	48%	53%	34%	84%	68%	48%	53%	34%	84%	68%	48%	53%	34%					
HOLLAND	58%	56%	57%	58%	56%	84%	82%	79%	83%	80%	37%	40%	35%	29%	32%	40%	38%	38%	40%	38%	23%	23%	22%	27%	30%	23%	22%	27%	30%	30%	54%	51%	55%	51%	48%	54%	51%	55%	51%	48%	54%	51%	55%	51%	48%					
BELGIUM	57%	53%	58%	50%	49%	80%	85%	82%	78%	78%	42%	45%	42%	49%	43%	41%	41%	41%	29%	36%	17%	17%	14%	18%	21%	17%	14%	18%	21%	21%	43%	54%	32%	24%	28%	43%	54%	32%	24%	28%	43%	54%	32%	24%	28%					
SWITZERLAND	52%	55%	48%	56%	55%	78%	75%	75%	72%	70%	46%	44%	45%	45%	41%	41%	44%	38%	34%	39%	13%	13%	12%	17%	21%	13%	12%	17%	21%	21%	67%	64%	69%	73%	75%	67%	64%	69%	73%	75%	67%	64%	69%	73%	75%					
FINLAND	42%	34%	81%	39%	58%	80%	72%	87%	75%	71%	40%	21%	51%	38%	58%	28%	57%	45%	48%	28%	33%	33%	21%	4%	14%	33%	21%	4%	14%	14%	69%	86%	93%	81%	73%	69%	86%	93%	81%	73%	69%	86%	93%	81%	73%					
DENMARK	47%	35%	38%	48%	42%	71%	72%	64%	68%	83%	34%	42%	44%	53%	42%	37%	36%	28%	25%	37%	30%	30%	22%	28%	23%	30%	22%	28%	23%	21%	74%	67%	68%	75%	40%	74%	67%	68%	75%	40%	74%	67%	68%	75%	40%					
AUSTRIA	52%	58%	55%	60%	56%	81%	85%	84%	81%	83%	35%	31%	41%	26%	23%	39%	36%	38%	46%	36%	26%	26%	33%	21%	28%	26%	33%	21%	28%	41%	71%	74%	62%	64%	57%	71%	74%	62%	64%	57%	71%	74%	62%	64%	57%					
SPAIN	23%	26%	29%	43%	35%	35%	53%	55%	47%	40%	55%	59%	55%	60%	49%	28%	21%	25%	25%	37%	18%	18%	21%	20%	15%	18%	21%	20%	15%	14%	77%	77%	64%	73%	76%	77%	77%	64%	73%	76%	77%	77%	64%	73%	76%					
PORTUGAL	20%	14%	14%	25%	30%	41%	59%	36%	46%	59%	71%	74%	63%	66%	76%	26%	15%	38%	19%	21%	3%	3%	11%	0%	15%	3%	11%	0%	15%	82%	83%	82%	88%	75%	82%	83%	82%	88%	75%	82%	83%	82%	88%	75%						
ITALY	30%	24%	23%	43%	34%	78%	72%	69%	68%	76%	62%	58%	61%	46%	62%	31%	25%	31%	44%	27%	8%	8%	16%	7%	9%	8%	16%	7%	9%	59%	58%	61%	61%	57%	59%	58%	61%	61%	57%	59%	58%	61%	61%	57%						
CANADA	39%	41%	48%	55%	48%	64%	63%	70%	69%	70%	37%	31%	39%	41%	37%	42%	38%	37%	29%	35%	22%	22%	32%	24%	30%	22%	32%	24%	30%	81%	69%	81%	77%	70%	81%	69%	81%	77%	70%	81%	69%	81%	77%	70%						
USA	40%	33%	36%	42%	42%	65%	63%	30%	63%	73%	41%	37%	31%	46%	43%	34%	39%	40%	34%	35%	25%	25%	24%	24%	21%	25%	24%	24%	22%	76%	77%	78%	82%	82%	76%	77%	78%	82%	82%	76%	77%	78%	82%	82%						
AUSTRALIA	52%	41%	43%	39%	45%	73%	65%	64%	55%	65%	42%	47%	38%	54%	42%	35%	31%	36%	23%	30%	24%	24%	22%	27%	23%	24%	22%	27%	28%	76%	70%	80%	66%	71%	76%	70%	80%	66%	71%	76%	70%	80%	66%	71%						
OTHER	30%	32%	37%	38%	49%	59%	67%	62%	63%	64%	56%	60%	58%	62%	49%	32%	27%	31%	23%	34%	12%	12%	13%	11%	15%	12%	13%	11%	17%	77%	76%	75%	75%	77%	77%	76%	75%	75%	77%	77%	76%	75%	75%	77%						
TOTAL	52%	50%	51%	53%	53%	44%	45%	45%	44%	46%	32%	36%	31%	36%	33%	35%	33%	37%	33%	36%	33%	33%	32%	31%	32%	33%	32%	32%	31%	32%	71%	70%	73%	73%	72%	71%	70%	73%	73%	72%	71%	70%	73%	73%	72%					

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 2004 – 2008

COUNTRY	Age Groups (years)												Average Adult Age																																					
	16 - 24			25 - 29			30 - 34			35 - 44			45 - 54			55 - 64			65 - 74			75+			Years																									
	2004	2005	2006	2007	2008	2004	2005	2006	2007	2008	2004	2005	2006	2007	2008	2004	2005	2006	2007	2008	2004	2005	2006	2007	2008	2004	2005	2006	2007	2008	2004	2005	2006	2007	2008															
UK	3%	3%	2%	3%	3%	3%	3%	3%	4%	4%	5%	5%	4%	5%	5%	16%	15%	15%	15%	14%	20%	20%	20%	21%	21%	23%	23%	24%	24%	24%	19%	20%	20%	19%	19%	10%	11%	11%	11%	11%	4%	5%	4%	5%	4%	55	55	56	55	55
IRELAND	8%	7%	4%	6%	4%	9%	8%	7%	8%	8%	10%	9%	9%	8%	11%	19%	18%	20%	18%	19%	20%	20%	21%	20%	20%	20%	20%	21%	20%	20%	11%	12%	12%	14%	11%	6%	6%	6%	6%	6%	2%	2%	2%	2%	2%	41	41	41	41	41
OTHER CI	18%	17%	16%	17%	19%	11%	11%	12%	12%	12%	12%	12%	11%	12%	10%	23%	24%	22%	21%	20%	17%	17%	18%	18%	18%	12%	11%	12%	13%	12%	16%	16%	16%	16%	16%	6%	6%	6%	6%	6%	2%	2%	2%	2%	2%	41	41	41	41	41
FRANCE	6%	6%	6%	6%	6%	8%	8%	8%	8%	8%	10%	10%	9%	9%	9%	22%	22%	22%	22%	21%	25%	26%	26%	26%	25%	16%	16%	18%	20%	20%	8%	8%	8%	8%	8%	4%	4%	3%	3%	3%	46	46	47	47	47					
GERMANY	2%	1%	2%	2%	2%	2%	2%	2%	3%	2%	6%	5%	4%	5%	4%	17%	19%	19%	19%	18%	22%	23%	23%	25%	24%	23%	23%	23%	22%	21%	23%	20%	20%	21%	21%	6%	6%	6%	5%	6%	55	54	54	53	54					
NORWAY	4%	2%	4%	5%	2%	4%	8%	2%	1%	3%	7%	9%	4%	1%	2%	15%	23%	9%	15%	16%	23%	21%	27%	23%	26%	28%	25%	34%	32%	31%	16%	9%	13%	19%	17%	4%	3%	5%	3%	2%	51	47	54	54	54					
SWEDEN	3%	4%	2%	3%	2%	4%	4%	3%	4%	3%	3%	3%	5%	4%	4%	16%	10%	12%	9%	12%	32%	28%	18%	28%	19%	22%	26%	30%	35%	36%	10%	12%	23%	12%	18%	11%	11%	8%	5%	5%	53	54	56	53	55					
HOLLAND	4%	3%	2%	2%	2%	6%	4%	3%	4%	4%	9%	10%	7%	4%	5%	26%	23%	23%	19%	19%	24%	26%	30%	32%	27%	21%	21%	24%	24%	28%	6%	9%	9%	10%	12%	3%	3%	2%	6%	4%	47	49	50	51	51					
BELGIUM	3%	3%	3%	5%	4%	4%	6%	4%	4%	5%	7%	9%	7%	4%	6%	19%	25%	17%	20%	18%	26%	27%	29%	35%	19%	19%	19%	15%	12%	9%	6%	4%	5%	4%	4%	52	48	52	49	49										
SWITZERLAND	2%	3%	2%	3%	6%	7%	3%	7%	7%	5%	13%	9%	7%	7%	8%	19%	21%	18%	27%	21%	22%	20%	24%	21%	23%	20%	23%	23%	20%	21%	12%	13%	14%	11%	10%	5%	6%	4%	6%	6%	50	51	51	48	49					
FINLAND	4%	0%	4%	3%	3%	4%	4%	3%	1%	3%	11%	14%	10%	1%	6%	45%	28%	20%	33%	20%	20%	33%	33%	21%	45%	12%	16%	22%	28%	15%	4%	5%	6%	11%	8%	0%	0%	2%	2%	0%	43	46	47	48	49					
DENMARK	3%	3%	3%	5%	4%	6%	7%	3%	1%	2%	4%	7%	5%	1%	4%	14%	12%	9%	8%	12%	32%	31%	28%	39%	31%	29%	26%	30%	24%	29%	10%	11%	15%	14%	12%	3%	4%	8%	7%	6%	51	50	54	56	52					
AUSTRIA	1%	2%	2%	3%	3%	5%	4%	5%	2%	2%	9%	2%	5%	2%	5%	23%	17%	16%	19%	13%	26%	35%	27%	24%	25%	16%	24%	26%	19%	12%	20%	14%	20%	26%	3%	5%	4%	4%	4%	7%	49	53	51	53	55					
SPAIN	2%	3%	4%	7%	11%	3%	6%	8%	8%	9%	6%	8%	10%	8%	10%	18%	25%	19%	26%	16%	27%	16%	17%	15%	19%	19%	20%	22%	17%	15%	18%	12%	17%	12%	15%	8%	8%	3%	7%	5%	53	50	49	47	48					
PORTUGAL	13%	20%	7%	10%	17%	16%	8%	19%	19%	9%	17%	14%	16%	19%	24%	17%	30%	16%	21%	25%	18%	12%	14%	13%	13%	6%	8%	14%	11%	9%	5%	4%	0%	7%	1%	6%	3%	14%	0%	2%	42	40	41	39	38					
ITALY	6%	4%	4%	10%	10%	8%	7%	10%	9%	9%	10%	8%	10%	9%	7%	23%	22%	32%	24%	38%	38%	19%	26%	17%	15%	11%	16%	13%	18%	14%	3%	22%	4%	12%	6%	0%	3%	1%	1%	0%	42	49	44	46	42					
CANADA	4%	3%	3%	5%	5%	4%	1%	1%	2%	2%	2%	2%	1%	2%	4%	9%	3%	9%	8%	10%	14%	20%	9%	13%	14%	25%	32%	27%	24%	27%	26%	23%	31%	22%	25%	17%	17%	18%	26%	14%	60	60	62	61	57					
USA	1%	5%	4%	0%	0%	2%	2%	4%	4%	9%	5%	3%	7%	4%	2%	8%	9%	11%	12%	17%	22%	22%	24%	16%	18%	23%	30%	28%	32%	23%	26%	17%	17%	21%	21%	13%	13%	6%	11%	10%	58	56	53	57	53					
AUSTRALIA	3%	4%	4%	4%	4%	5%	6%	4%	5%	6%	6%	2%	5%	5%	6%	10%	10%	13%	9%	9%	16%	19%	19%	17%	18%	32%	29%	32%	38%	28%	23%	22%	20%	18%	22%	6%	8%	5%	5%	7%	55	55	54	54	54					
OTHER	14%	16%	14%	13%	16%	15%	10%	12%	13%	12%	8%	8%	8%	13%	11%	17%	14%	16%	16%	17%	19%	19%	16%	17%	15%	15%	16%	16%	14%	16%	8%	11%	13%	10%	11%	4%	4%	4%	4%	3%	43	45	45	44	43					
TOTAL	4%	4%	4%	4%	4%	4%	4%	4%	4%	4%	6%	6%	5%	4%	5%	18%	17%	16%	16%	15%	21%	21%	21%	21%	21%	22%	22%	23%	23%	23%	17%	17%	18%	17%	17%	9%	9%	10%	10%	9%	53	53	54	53	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
Hotels	167	168	166	163	152	146	136	133	119	109	99	93	87	86	82	81	76
Guest Houses	198	188	168	150	129	104	93	84	76	68	59	54	54	50	49	49	42
Holiday Villages	2	2	2	2	2	2	2	2	2	0	0	0	0	0	0	0	0
Self-Catering	20	20	21	23	27	29	31	35	35	35	29	26	21	25	25	24	22
Campsites	6	6	6	4	4	4	4	4	4	4	4	4	4	4	4	4	4
Youth Hostel																	
Total	393	384	363	342	314	285	266	258	236	216	191	177	167	166	161	159	145

Accommodation Bed Spaces by Category 1992 – 2008

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

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 2007 and 2008

	2007												2008													
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Year
Hotel bed nights available	135,600	151,200	198,800	295,300	375,800	378,900	389,500	393,300	366,400	287,100	205,100	174,400	3,351,300	139,300	139,800	178,600	248,800	295,900	287,900	288,000	298,000	288,400	242,700	177,600	155,700	2,750,800
Guest House bed nights available	30,300	51,200	78,200	148,300	252,900	288,000	315,300	331,100	293,300	170,900	65,000	52,100	2,076,400	10,800	13,200	20,000	23,600	27,700	27,200	28,900	28,900	27,600	23,500	11,500	9,900	252,700
Total bed occupancy	22%	34%	39%	50%	67%	76%	81%	84%	80%	60%	32%	30%	62%	19%	33%	38%	46%	69%	74%	79%	83%	71%	54%	27%	24%	58%
Hotel bed nights sold	113,500	119,900	153,400	243,700	284,900	279,000	292,200	295,200	283,800	237,100	175,900	150,000	2,628,600	139,300	139,800	178,600	248,800	295,900	287,900	288,000	298,000	288,400	242,700	177,600	155,700	2,750,800
Guest House bed nights sold	9,900	12,700	22,600	27,300	29,300	29,600	31,000	30,700	27,100	22,900	11,700	8,300	263,000	10,800	13,200	20,000	23,600	27,700	27,200	28,900	28,900	27,600	23,500	11,500	9,900	252,700
Other bed nights sold	12,200	18,600	22,800	24,300	61,600	70,300	66,300	67,400	55,500	27,200	17,400	16,100	459,600	16,000	17,100	20,200	26,000	62,500	64,500	67,400	68,400	64,800	29,800	23,300	22,000	482,000
Hotel bed space occupancy	24%	37%	45%	55%	72%	82%	80%	86%	86%	61%	34%	32%	64%	139,300	139,800	178,600	248,800	295,900	287,900	288,000	298,000	288,400	242,700	177,600	155,700	2,750,800
Guest House bed space occupancy	19%	22%	21%	34%	55%	64%	71%	71%	69%	38%	20%	20%	49%	10,800	13,200	20,000	23,600	27,700	27,200	28,900	28,900	27,600	23,500	11,500	9,900	252,700
Other bed space occupancy	11%	24%	18%	22%	49%	59%	88%	83%	54%	68%	17%	15%	55%	16,000	17,100	20,200	26,000	62,500	64,500	67,400	68,400	64,800	29,800	23,300	22,000	482,000
Hotel bed nights sold	27,100	44,000	69,200	133,600	206,400	227,800	235,000	253,500	244,700	143,900	59,500	47,900	1,692,600	27,900	51,100	76,500	124,400	217,300	224,000	233,500	248,700	225,900	133,700	51,200	40,200	1,654,400
Guest House bed nights sold	1,900	2,800	4,800	9,200	16,100	19,000	21,900	21,900	18,800	8,600	2,400	1,700	128,900	2,400	3,000	3,000	7,300	16,800	18,300	19,700	21,400	18,300	9,100	2,300	1,800	123,400
Other bed nights sold	1,300	4,400	4,100	5,500	30,300	41,200	58,400	55,800	29,800	18,400	3,000	2,500	254,900	1,400	2,300	4,000	5,600	33,900	40,000	58,900	56,800	26,200	16,100	3,800	3,800	252,700
Hotel bed space occupancy	20%	37%	43%	50%	73%	78%	78%	83%	78%	55%	29%	26%	60%	27,900	51,100	76,500	124,400	217,300	224,000	233,500	248,700	225,900	133,700	51,200	40,200	1,654,400
Guest House bed space occupancy	23%	23%	15%	31%	61%	67%	68%	74%	66%	39%	20%	18%	49%	2,400	3,000	3,000	7,300	16,800	18,300	19,700	21,400	18,300	9,100	2,300	1,800	123,400
Unserviced bed space occupancy	9%	13%	20%	21%	54%	62%	87%	83%	40%	54%	16%	17%	52%	1,400	2,300	4,000	5,600	33,900	40,000	58,900	56,800	26,200	16,100	3,800	3,800	252,700

Appendix 11

Room space occupancy 2007 and 2008

	2007												2008													
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Year
Room nights available	63,000	68,600	91,300	137,300	158,400	159,200	164,400	166,300	162,500	132,800	95,300	81,800	1,480,900	77,300	79,700	102,800	138,300	165,400	161,600	166,600	169,100	162,800	138,600	99,900	87,200	1,549,500
Room nights sold	20,500	33,700	48,500	79,900	117,800	131,100	138,200	149,200	146,900	86,100	41,800	33,100	1,026,900	22,900	37,100	52,300	70,600	123,100	127,200	136,900	147,900	136,000	83,000	39,100	28,300	1,004,300
Room night occupancy	32%	49%	53%	58%	74%	82%	84%	90%	90%	65%	44%	40%	69%	30%	47%	51%	51%	74%	79%	82%	87%	84%	60%	39%	32%	65%
Hotel room nights available	53,500	58,300	75,000	118,500	137,900	136,000	142,500	144,300	139,500	115,200	86,200	73,100	1,280,000	68,200	68,700	87,500	120,900	144,800	140,300	145,300	145,300	140,000	118,300	86,800	75,700	1,341,800
Guest House room nights available	4,800	5,900	11,200	13,400	14,300	14,900	15,500	15,300	14,000	11,300	5,700	4,400	130,600	5,200	6,300	9,800	11,700	13,700	13,500	13,300	14,300	13,600	11,600	6,200	4,800	124,200
Unserviced room nights available	4,800	4,400	5,100	5,300	6,300	8,300	8,600	8,600	8,300	6,300	3,500	4,300	73,800	3,900	4,700	5,600	5,700	6,900	7,700	8,000	9,500	9,200	8,700	6,900	6,700	83,500
Hotel room nights sold	17,800	30,200	43,600	73,000	104,300	113,600	119,600	129,700	129,000	74,600	38,300	30,100	904,000	68,200	68,700	87,500	120,900	144,800	140,300	145,300	145,300	140,000	118,300	86,800	75,700	1,341,800
Guest House room nights sold	1,200	1,800	3,000	4,800	7,900	9,400	11,100	11,100	10,400	5,500	1,400	1,100	68,500	5,200	6,300	9,800	11,700	13,700	13,500	13,300	14,300	13,600	11,600	6,200	4,800	124,200
Unserviced room nights sold	1,500	1,800	1,900	2,100	5,600	8,000	7,600	8,400	7,600	6,000	2,100	1,900	54,400	3,900	4,700	5,600	5,700	6,900	7,700	8,000	9,500	9,200	8,700	6,900	6,700	83,500
Hotel room occupancy	33%	52%	58%	62%	76%	84%	84%	90%	92%	65%	44%	41%	71%	68,200	68,700	87,500	120,900	144,800	140,300	145,300	145,300	140,000	118,300	86,800	75,700	1,341,800
Guest House room occupancy	25%	30%	26%	36%	55%	64%	71%	72%	75%	49%	24%	24%	52%	5,200	6,300	9,800	11,700	13,700	13,500	13,300	14,300	13,600	11,600	6,200	4,800	124,200
Unserviced room occupancy	31%	41%	37%	39%	89%	96%	88%	98%	91%	96%	61%	44%	74%	3,900	4,700	5,600	5,700	6,900	7,700	8,000	9,500	9,200	8,700	6,900	6,700	83,500
Hotel room occupancy	29%	49%	56%	54%	75%	79%	82%	88%	85%	60%	39%	32%	66%	68,200	68,700	87,500	120,900	144,800	140,300	145,300	145,300	140,000	118,300	86,800	75,700	1,341,800
Guest House room occupancy	33%	31%	19%	35%	62%	68%	73%	77%	70%	49%	24%	23%	53%	5,200	6,300	9,800	11,700	13,700	13,500	13,300	14,300	13,600	11,600	6,200	4,800	124,200
Unserviced room occupancy	42%	32%	30%	32%	87%	99%	95%	94%	75%	66%	48%	49%	67%	3,900	4,700	5,600	5,700	6,900	7,700	8,000	9,500	9,200	8,700	6,900	6,700	83,500

Appendix 12

Jersey Link - Jersey Tourism Central Reservations 2004-2008

	BOOKINGS			No. of People	No. of Bednights	Value of Bookings	Value per Bednight
	VSC	Web	Total				
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
Total	3,777	3,130	6,907	14,748	45,153	£1,518,286	£33.63
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
Total	2,289	3,487	5,776	12,255	39,376	£1,306,853	£33.19
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
Total	1,812	4,165	5,977	12,781	42,602	£1,459,831	£34.27
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
Total	1,414	4,603	6,017	12,955	42,735	£1,555,654	£36.40
2008							
January	39	291	330	702	2,822	£98,170	£34.79
February	35	362	397	932	3,575	£122,891	£34.38
March	48	326	374	810	2,888	£104,160	£36.07
April	45	365	410	898	2,910	£110,190	£37.87
May	91	445	536	1,096	3,649	£141,672	£38.82
June	115	429	544	1,148	4,016	£162,969	£40.58
July	156	420	576	1,238	4,004	£165,321	£41.29
August	161	384	545	1,122	3,415	£134,739	£39.46
September	104	205	309	589	1,584	£57,204	£36.11
October	39	115	154	307	814	£25,491	£31.32
November	20	86	106	204	589	£19,494	£33.10
December	22	69	91	178	454	£14,531	£32.01
Total	875	3,497	4,372	9,224	30,720	£1,156,832	£37.66
2008 vs. 2007	-38%	-24%	-27%	-29%	-28%	-26%	3%

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

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

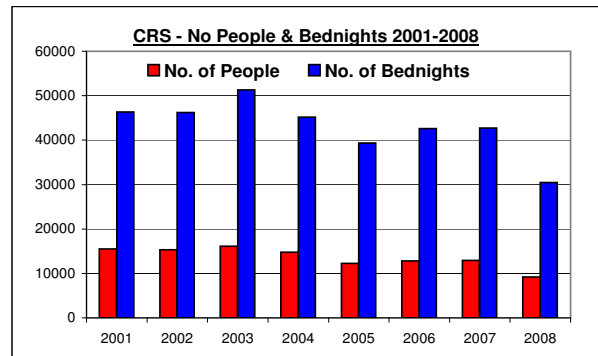
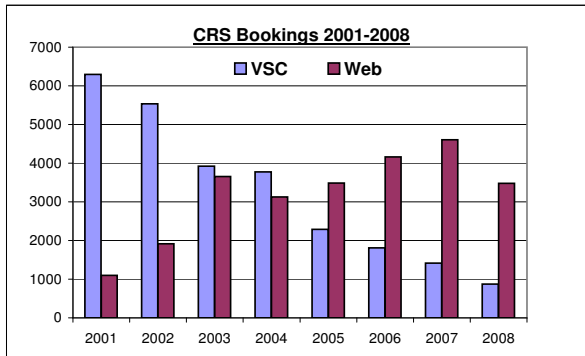
To receive notification of updated or new information, please visit and register at www.jersey.com/marketinginfo
www.jersey.com/marketinginfo

Appendix 13

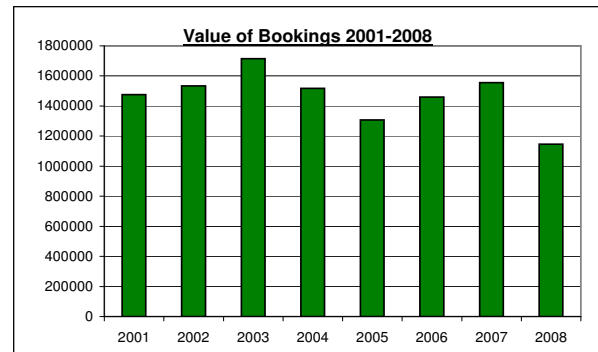
JerseyLink - Jersey Tourism Central Reservations

	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
2008	872	3,477	4,349

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
9,180	30,441	£1,145,546	£37.63



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

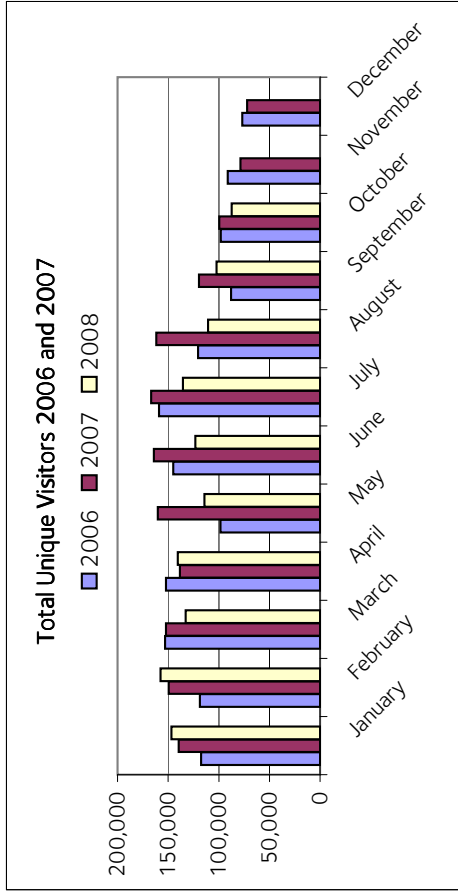


To receive notification of updated or new information, please visit and register at www.jersey.com/marketinginfo

Appendix 14.1

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

	2006	2007	2008
January	117,513	139,622	146,823
February	118,594	149,429	157,522
March	152,984	152,074	132,680
April	152,106	138,373	140,374
May	98,235	160,220	114,142
June	144,946	164,197	123,143
July	158,955	166,667	135,422
August	120,474	161,594	110,565
September	87,949	119,620	102,186
October	98,165	99,690	87,169
November	91,094	78,548	***
December	76,767	72,010	***
Total	1,417,782	1,602,044	1,250,026



*** Data covering the period 20/11/08 to 31/12/08 is not included in this figure due to reporting difficulties that were not resolved at the time of publication.

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

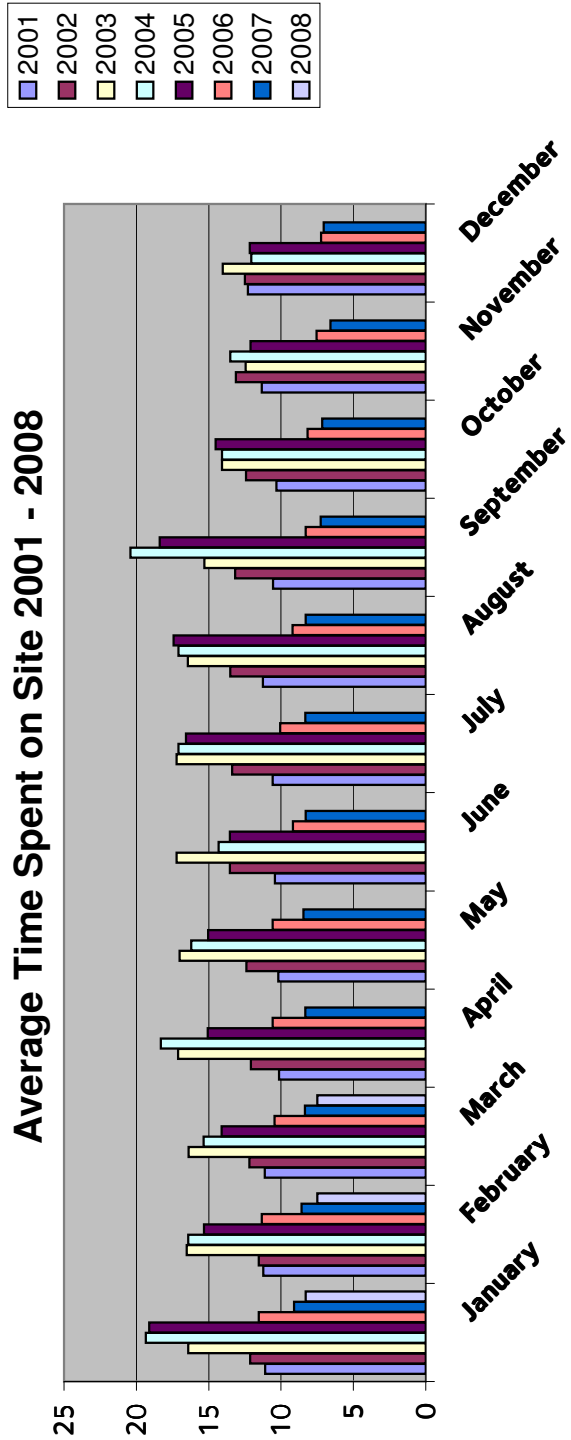
*** Data covering the period 20/11/08 to 31/12/08 is not included in this figure due to reporting difficulties that were not resolved at the

Appendix 14.2

Average Time Spent on Site 2001 - 2008

	2001	2002	2003	2004	2005	2006	2007	2008
January	11.10	12.14	16.42	19.35	19.12	11.55	9.11	8.30
February	11.24	11.54	16.52	16.42	15.32	11.33	8.59	7.50
March	11.13	12.19	16.39	15.34	14.11	10.46	8.36	7.49
April	10.14	12.09	17.11	18.30	15.08	10.57	8.33	7.63
May	10.18	12.40	17.02	16.21	15.03	10.57	8.46	8.23
June	10.42	13.53	17.23	14.31	13.53	9.18	8.31	7.43
July	10.58	13.38	17.22	17.09	16.57	10.06	8.32	7.37
August	11.25	13.52	16.44	17.09	17.43	9.21	8.31	7.87
September	10.55	13.17	15.31	20.41	18.38	8.29	7.27	7.94
October	10.33	12.43	14.09	14.09	14.51	8.17	7.17	6.96
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	***
Total	10.88	12.67	15.85	16.18	15.28	9.51	7.99	6.39

*** Data covering the period 20/1/08 to 31/12/08 is not included in this figure due to reporting difficulties that were not resolved at the time of publication.



Appendix 15

Total Passenger Arrivals 2001 - 2008

	TOTAL AIR ARRIVALS												TOTAL SEA ARRIVALS												TOTAL ARRIVALS											
	2001	2002	2003	2004	2005	2006	2007	2008	2001	2002	2003	2004	2005	2006	2007	2008	2001	2002	2003	2004	2005	2006	2007	2008												
JAN	39,980	38,160	37,920	36,984	384,82	38,803	41,046	43,417	5,110	6,970	6,830	5,324	6,768	7,022	7,345	6,669	45,090	45,130	44,750	42,308	45,250	45,825	48,991	50,086												
FEB	41,230	40,840	40,300	41,884	40,486	41,593	44,208	49,938	9,070	8,200	8,870	9,857	11,609	8,731	8,655	10,057	50,300	49,050	49,170	51,541	52,095	50,324	52,863	59,995												
MAR	50,860	51,730	51,310	51,014	52,667	52,633	55,439	60,822	13,090	17,890	15,460	11,597	18,616	11,516	15,192	12,484	63,940	69,620	66,770	62,611	71,283	64,149	70,631	73,306												
APR	66,870	58,230	65,320	63,609	57,454	62,498	62,562	66,970	40,260	35,840	42,930	39,630	34,738	35,542	38,785	32,080	107,130	94,070	108,250	103,239	92,192	98,040	101,347	99,050												
MAY	76,640	71,890	74,660	74,147	74,492	69,421	73,530	81,287	53,380	52,380	53,020	47,856	48,451	40,182	45,887	47,905	130,020	124,270	127,680	122,003	122,943	109,603	119,417	129,192												
JUN	84,460	81,190	75,300	76,232	75,268	76,736	79,165	78,557	63,760	68,440	57,970	55,019	56,220	47,822	49,305	48,531	148,220	149,640	133,260	131,251	131,488	124,558	128,470	127,088												
JUL	88,110	79,800	82,060	85,930	84,076	83,093	86,307	86,307	66,260	70,440	62,650	63,816	63,384	54,421	54,952	53,424	154,370	150,240	144,710	149,746	148,150	138,497	138,045	139,731												
AUG	90,890	87,650	89,050	84,852	83,871	82,740	89,233	92,544	91,780	90,640	84,020	74,035	83,258	66,818	71,686	72,516	182,670	178,290	173,070	158,887	167,129	149,558	160,919	165,060												
SEP	81,780	73,030	71,940	76,518	76,000	76,835	79,633	77,639	58,130	58,510	52,770	50,047	53,852	48,779	47,327	38,751	139,900	131,540	124,720	126,565	129,852	125,614	127,260	116,390												
OCT	57,350	60,160	58,350	66,041	62,342	63,127	65,238	64,671	24,770	26,440	32,140	24,658	28,974	23,206	23,993	20,126	82,120	86,600	90,490	90,699	91,316	86,333	89,231	84,797												
NOV	47,930	48,580	46,650	46,618	49,812	52,628	56,720	50,581	11,970	11,580	10,010	11,870	11,315	11,017	11,928	8,705	59,900	60,160	56,660	58,488	61,127	63,645	66,648	59,286												
DEC	41,990	44,060	44,540	45,302	46,285	48,269	50,886	47,721	12,630	12,270	9,190	11,442	10,278	10,882	8,637	9,169	54,620	56,330	53,730	56,744	56,563	59,151	59,523	56,890												
SUMMER	179,000	167,450	171,110	170,782	168,637	166,816	172,326	178,651	158,040	161,080	146,670	137,851	146,642	121,239	126,638	125,940	337,040	328,130	317,780	306,633	315,279	288,055	298,964	304,791												
SPRING	227,970	211,310	215,280	213,988	207,214	208,655	215,257	226,814	157,400	156,660	153,920	142,505	139,409	123,546	133,977	128,516	385,370	367,980	369,190	356,493	346,623	332,201	349,234	355,330												
AUTUMN	139,130	133,190	130,290	142,559	138,342	139,962	145,171	142,310	82,900	84,950	84,910	74,705	82,826	71,985	71,320	58,877	222,020	218,140	215,210	217,264	221,168	211,947	216,491	201,187												
WINTER	221,990	223,370	220,720	221,802	227,732	233,926	248,899	252,479	51,870	56,910	50,360	49,890	58,586	49,168	51,757	47,084	273,850	280,290	271,080	271,692	286,318	283,094	300,656	299,563												
YEAR	768,090	735,320	737,400	749,131	741,925	749,359	781,653	800,454	450,210	459,600	435,860	404,951	427,463	365,938	383,682	360,417	1,218,280	1,194,940	1,173,260	1,154,082	1,169,388	1,115,297	1,165,345	1,160,871												

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 2001 - 2008

	UK AIR ARRIVALS												UK SEA ARRIVALS												TOTAL UK ARRIVALS											
	2001	2002	2003	2004	2005	2006	2007	2008	2001	2002	2003	2004	2005	2006	2007	2008	2001	2002	2003	2004	2005	2006	2007	2008												
JAN	30,885	29,871	30,113	30,447	31,788	32,076	34,546	35,850	1,548	2,202	2,032	1,588	1,244	1,507	1,561	1,453	32,433	32,073	32,145	32,035	33,032	33,583	36,107	37,303												
FEB	32,366	32,622	32,177	35,298	33,881	35,320	37,030	41,709	3,386	2,720	2,484	2,510	2,418	1,837	1,719	2,062	35,752	35,342	34,661	37,808	36,299	37,157	38,749	43,771												
MAR	40,519	42,379	42,011	42,872	44,855	44,473	47,577	52,244	4,749	6,515	5,043	4,262	5,541	3,151	3,507	3,238	45,268	48,894	47,054	47,234	50,396	47,624	51,084	55,482												
APR	55,240	47,516	55,714	54,972	49,274	54,183	55,642	56,638	12,739	10,569	10,763	9,406	8,755	8,492	8,397	6,508	67,979	58,085	66,477	64,378	58,029	62,675	64,039	63,146												
MAY	64,943	59,890	65,440	64,237	65,257	59,907	65,454	69,398	13,583	12,692	13,045	10,063	10,576	9,396	9,347	10,049	78,526	72,582	78,485	74,300	75,833	69,303	74,801	79,447												
JUN	71,698	69,682	65,653	66,233	65,249	66,231	68,156	66,995	15,917	18,216	13,753	12,589	12,185	10,002	10,377	9,451	87,615	87,898	79,406	78,822	77,434	76,233	78,533	76,446												
JUL	75,894	69,104	71,535	75,181	74,411	74,204	73,354	73,844	19,060	20,264	16,379	17,301	15,910	13,177	13,896	12,825	94,954	89,368	89,914	92,482	90,321	87,381	87,250	86,669												
AUG	79,616	77,389	80,054	75,975	73,244	73,244	79,444	80,493	23,520	24,695	22,574	21,683	22,133	17,759	17,243	18,994	103,136	102,084	102,628	97,858	96,108	91,003	96,687	99,487												
SEP	70,264	63,084	62,915	66,917	66,297	67,205	70,377	65,240	17,070	16,409	15,170	13,486	12,291	10,442	10,214	9,013	87,334	79,493	78,085	80,403	78,588	77,647	80,591	74,253												
OCT	47,619	51,495	49,673	56,012	52,934	54,042	56,778	54,352	11,034	10,191	10,392	8,226	8,680	8,387	8,122	6,720	58,653	61,686	60,065	64,238	61,614	62,429	64,900	61,072												
NOV	37,219	39,334	38,455	38,345	41,683	44,846	47,692	41,830	4,642	4,499	3,306	3,455	3,018	3,034	2,835	1,975	41,861	43,833	41,761	41,800	44,701	47,880	50,527	43,805												
DEC	34,758	37,292	38,443	38,818	40,392	42,106	44,455	40,635	3,184	2,786	2,594	2,417	2,131	2,292	2,023	2,288	37,942	40,078	41,037	41,235	42,523	44,398	46,478	42,923												
SUMMER	155,510	146,493	151,569	151,156	148,386	147,448	152,798	154,337	42,580	44,959	40,953	38,984	38,043	30,936	31,139	31,819	198,090	191,452	192,542	190,140	186,429	178,384	183,937	186,156												
SPRING	191,881	177,088	186,807	185,442	179,780	180,321	189,252	193,031	42,239	41,477	37,561	32,058	31,516	27,890	28,121	26,008	234,120	218,565	224,368	217,500	211,296	208,211	217,373	219,039												
AUTUMN	117,883	114,579	112,588	122,929	119,231	121,247	127,155	119,592	28,104	26,600	25,562	21,712	20,971	18,829	18,336	15,733	145,987	141,179	138,150	144,641	140,202	140,076	145,491	135,325												
WINTER	175,747	181,698	181,199	185,880	192,599	198,821	211,300	212,268	17,509	18,722	15,459	14,232	14,352	11,821	11,645	11,016	193,256	200,220	196,658	200,112	206,951	210,642	222,945	223,284												
YEAR	641,021	619,658	632,183	645,407	639,996	647,837	680,505	676,228	130,432	131,758	119,535	106,986	104,882	89,476	89,241	84,576	771,453	751,416	751,718	752,393	744,878	737,313	769,746	763,804												

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 17 Inter-Island Passenger Arrivals 2001 - 2008

	INTER-ISLAND AIR ARRIVALS												INTER-ISLAND SEA ARRIVALS												TOTAL INTER-ISLAND ARRIVALS											
	2001	2002	2003	2004	2005	2006	2007	2008	2001	2002	2003	2004	2005	2006	2007	2008	2001	2002	2003	2004	2005	2006	2007	2008												
JAN	5,785	5,399	5,191	4,716	5,051	4,835	5,300	5,603	150	330	279	731	220	533	414	345	5,935	5,729	5,470	5,447	5,782	5,368	5,714	5,948												
FEB	6,032	5,633	6,217	5,565	5,188	5,051	5,691	6,049	467	805	625	1,006	1,380	759	699	570	6,499	6,438	6,842	6,571	6,194	5,810	6,390	6,619												
MAR	7,358	6,823	6,888	6,576	6,154	6,669	7,256	7,071	994	2,308	1,015	1,432	2,496	1,221	1,547	924	8,352	9,131	7,903	8,008	7,586	7,890	8,803	7,995												
APR	6,848	7,106	6,098	6,022	5,781	5,588	5,873	7,249	6,175	5,315	7,253	5,442	5,383	4,532	5,019	3,553	13,023	12,421	13,351	11,464	11,223	10,120	10,892	10,802												
MAY	7,289	6,938	5,592	6,410	5,927	5,848	6,044	7,052	9,691	8,109	9,471	7,593	7,124	5,502	7,314	7,583	16,980	15,047	15,063	14,003	13,520	11,350	13,358	14,635												
JUN	7,154	5,972	5,470	6,356	6,356	6,827	7,151	7,143	11,659	13,042	9,511	7,783	8,173	7,656	7,265	7,257	18,813	19,014	14,981	14,139	14,139	14,483	14,416	14,400												
JUL	6,532	5,965	6,016	6,164	5,888	5,882	5,818	7,019	11,500	12,684	11,652	9,926	10,209	8,192	8,188	7,827	18,032	18,649	17,668	16,090	15,814	14,074	14,006	14,846												
AUG	6,562	5,912	4,642	5,127	5,505	5,679	5,854	6,372	17,414	17,424	14,198	10,690	12,110	11,671	12,514	11,089	23,976	23,336	18,840	15,817	16,195	17,350	18,368	17,461												
SEP	7,303	6,721	5,921	6,211	6,339	6,295	6,400	7,243	9,930	10,885	8,002	7,481	8,647	8,594	7,525	5,340	17,233	17,606	13,923	13,692	13,820	14,889	13,925	12,583												
OCT	7,284	6,448	6,462	6,903	6,443	6,711	6,613	7,389	3,563	5,661	7,719	4,092	5,659	3,386	4,387	2,496	10,847	12,109	14,181	10,995	10,535	10,097	11,000	9,885												
NOV	7,978	7,494	6,997	7,423	6,907	6,915	7,564	7,058	663	887	1,182	879	834	636	1,068	631	8,641	8,381	8,179	8,302	7,786	7,551	8,632	7,689												
DEC	5,738	5,464	5,125	5,729	5,133	5,325	5,274	5,380	1,705	1,587	1,244	1,485	1,490	1,731	1,037	1,158	7,443	7,071	6,369	7,214	6,618	7,056	6,311	6,538												
SUMMER	13,094	11,877	10,658	11,291	11,393	11,561	11,672	13,391	28,914	30,108	25,850	20,616	22,319	19,863	20,702	18,916	42,008	41,985	36,508	31,907	32,009	31,424	32,374	32,307												
SPRING	21,291	20,016	17,160	18,788	18,064	18,263	19,068	21,444	27,525	26,466	26,235	20,818	20,680	17,690	19,598	18,393	48,816	46,482	43,395	39,606	38,882	35,953	38,666	39,837												
AUTUMN	14,587	13,169	12,383	13,114	12,782	13,006	13,013	14,632	13,493	16,546	15,721	11,573	14,306	11,980	11,912	7,836	28,080	29,715	28,104	24,687	24,355	24,986	24,925	22,468												
WINTER	32,891	30,833	30,418	30,009	28,433	28,795	31,085	31,161	3,979	5,917	4,345	5,533	6,420	4,880	4,705	3,628	36,870	36,750	34,763	35,542	33,966	33,675	35,850	34,789												
YEAR	81,863	75,895	70,619	73,202	70,672	71,625	74,838	80,628	73,911	79,037	72,151	58,540	63,725	54,413	56,977	48,773	155,774	154,932	142,770	131,742	129,212	126,038	131,815	129,401												

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 2001 – 2008

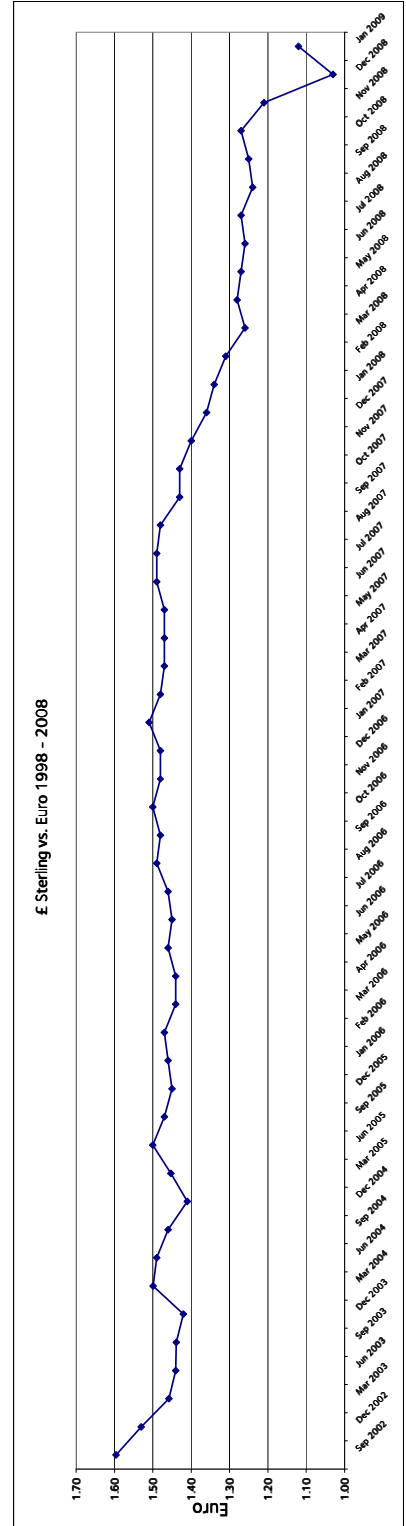
	CONTINENTAL AIR ARRIVALS												CONTINENTAL SEA ARRIVALS												TOTAL CONTINENTAL ARRIVALS											
	2001	2002	2003	2004	2005	2006	2007	2008	2001	2002	2003	2004	2005	2006	2007	2008	2001	2002	2003	2004	2005	2006	2007	2008	2001	2002	2003	2004	2005	2006	2007	2008				
JAN	3,306	2,893	2,617	1,821	1,643	1,892	1,800	1,964	3,412	4,439	4,520	3,005	5,304	4,982	5,370	4,871	6,718	7,332	7,137	4,026	6,947	6,874	7,170	6,835	8,045	7,266	7,670	7,162	9,228	7,357	7,724	9,605				
FEB	2,828	2,588	1,907	1,021	1,417	1,222	1,487	2,180	5,217	4,678	5,763	6,141	7,811	6,135	6,237	7,425	8,045	7,266	7,670	7,162	9,228	7,357	7,724	9,605	10,324	11,590	11,814	7,369	12,237	8,635	10,744	9,829				
MAR	2,980	2,527	2,410	1,466	1,658	1,491	606	1,507	7,344	9,063	9,404	5,903	10,579	7,144	10,138	8,322	10,324	11,590	11,814	7,369	12,237	8,635	10,744	9,829	26,124	23,561	28,418	27,397	22,999	25,245	26,416	25,102				
APR	4,781	3,608	3,508	2,615	2,399	2,727	1,047	3,083	21,343	19,953	24,910	24,782	20,600	22,518	25,369	22,019	34,514	36,640	34,131	33,700	34,059	28,950	31,258	35,110	41,793	42,723	38,877	38,290	39,525	33,842	35,521	36,242				
MAY	4,412	5,064	3,626	3,500	3,308	3,666	2,032	4,837	30,102	31,576	30,505	30,200	30,751	25,284	29,226	30,273	41,382	42,222	37,129	41,174	41,732	37,042	36,789	38,216	55,556	52,868	51,600	45,412	53,406	41,205	45,864	48,112				
JUN	5,610	5,539	4,173	3,643	3,663	3,678	3,858	4,419	36,183	37,184	34,704	34,647	35,862	30,164	31,663	31,823	41,382	42,222	37,129	41,174	41,732	37,042	36,789	38,216	35,335	34,442	32,710	32,470	36,278	33,078	32,744	29,554				
JUL	5,685	4,730	4,513	4,585	4,467	3,990	3,921	5,444	35,697	37,492	32,616	36,589	37,265	33,052	32,868	32,772	41,382	42,222	37,129	41,174	41,732	37,042	36,789	38,216	55,556	52,868	51,600	45,412	53,406	41,205	45,864	48,112				
AUG	4,710	4,349	4,355	3,750	4,391	3,817	3,935	5,679	50,846	48,519	47,245	41,662	49,015	37,388	41,929	42,433	55,556	52,868	51,600	45,412	53,406	41,205	45,864	48,112	35,335	34,442	32,710	32,470	36,278	33,078	32,744	29,554				
SEP	4,208	3,228	3,108	3,390	3,364	3,335	3,156	5,156	31,127	31,214	29,602	29,080	32,914	29,743	29,588	24,398	35,335	34,442	32,710	32,470	36,278	33,078	32,744	29,554	12,617	12,800	16,246	15,466	17,600	13,807	13,331	13,840				
OCT	2,444	2,212	2,217	3,126	2,965	2,374	1,847	2,930	10,173	10,588	14,029	12,340	14,635	11,433	11,484	10,910	12,617	12,800	16,246	15,466	17,600	13,807	13,331	13,840	9,398	7,944	6,715	8,386	8,685	8,214	9,489	7,792				
NOV	2,731	1,749	1,196	850	1,222	867	1,464	1,693	6,667	6,195	5,519	7,536	7,463	7,347	8,025	6,099	9,398	7,944	6,715	8,386	8,685	8,214	9,489	7,792	9,398	7,944	6,715	8,386	8,685	8,214	9,489	7,792				
DEC	1,496	1,287	972	755	760	838	1,157	1,706	7,741	7,898	5,352	7,540	6,657	6,859	5,577	5,723	9,398	7,944	6,715	8,386	8,685	8,214	9,489	7,792	9,398	7,944	6,715	8,386	8,685	8,214	9,489	7,792				
SUMMER	10,395	9,079	8,868	8,335	8,858	7,807	7,856	11,123	86,543	86,011	79,861	78,251	86,280	70,440	74,797	75,205	96,938	95,090	88,729	86,586	95,138	78,247	82,653	86,328	102,431	102,924	101,426	99,387	96,583	88,037	93,195	96,454				
SPRING	14,803	14,211	11,307	9,758	9,370	10,071	6,937	12,339	87,628	88,713	90,119	89,629	87,213	77,966	86,258	84,115	102,431	102,924	101,426	99,387	96,583	88,037	93,195	96,454	47,952	47,242	48,956	47,936	53,878	46,885	46,075	43,394				
AUTUMN	6,652	5,440	5,325	6,516	6,329	5,709	5,003	8,086	41,300	41,802	43,631	41,420	47,549	41,176	41,072	35,308	47,952	47,242	48,956	47,936	53,878	46,885	46,075	43,394	43,722	43,317	39,660	36,038	44,514	38,777	41,861	41,490				
WINTER	13,341	11,044	9,102	5,913	6,700	6,310	6,514	9,050	30,381	32,273	30,558	30,125	37,814	32,467	35,347	32,440	43,722	43,317	39,660	36,038	44,514	38,777	41,861	41,490	291,043	286,573	276,771	269,947	280,113	251,946	265,784	267,666				
YEAR	45,191	39,774	34,602	30,522	31,257	29,897	26,310	40,598	245,852	246,799	244,169	239,425	258,856	222,049	237,474	227,068	291,043	286,573	276,771	269,947	280,113	251,946	265,784	267,666	291,043	286,573	276,771	269,947	280,113	251,946	265,784	267,666				

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

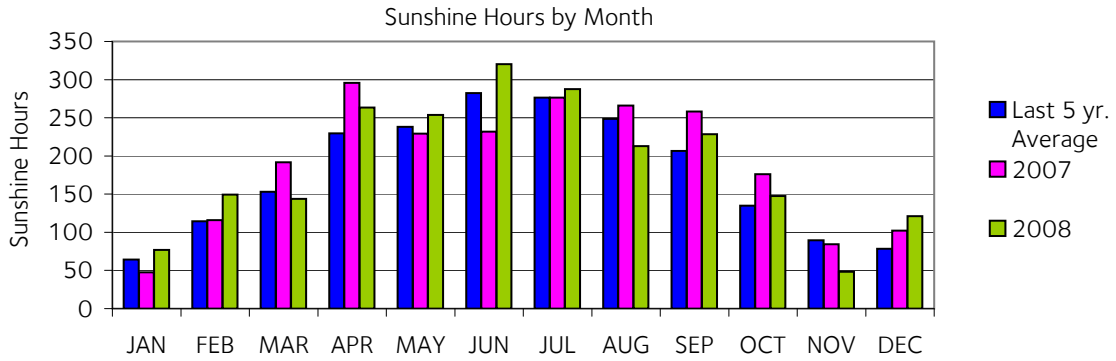
Appendix 19

Selected exchange rates against sterling since January 1998

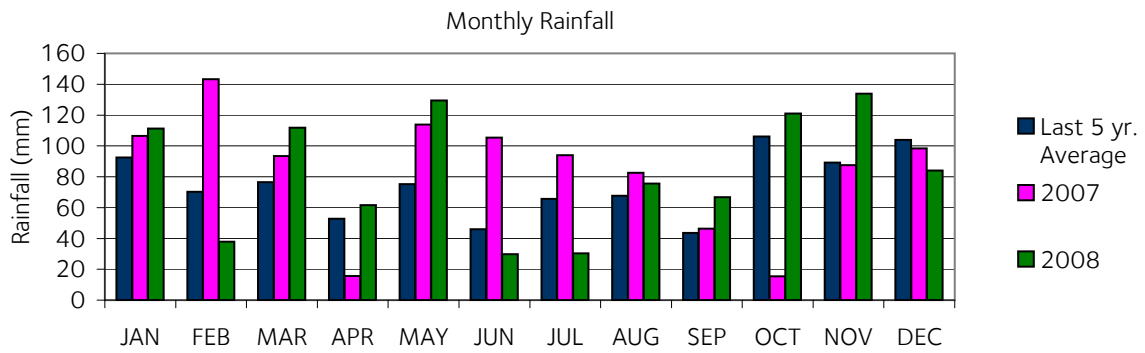
	Aus	Bel	Den	Fin	Fra	Ger	Gre	Ita	Hol	Nor	Por	Spt	Swe	Svz	Euro	USA	Can	Australia	Japan		
2002 Sep	11.86														14.61	1.60	1.56	2.46	2.87	190.96	
2002 Dec	11.40									11.16					14.05	2.23	1.53	1.60	2.53	2.85	190.13
2003 Mar	10.83									11.51					13.43	2.15	1.46	1.57	2.30	2.61	188.32
2003 Jun	10.73									11.96					13.25	2.23	1.44	1.65	2.23	2.48	197.39
2003 Sep	10.69									11.66					12.84	2.22	1.44	1.66	2.25	2.46	184.51
2003 Dec	10.58									12.89					12.89	2.22	1.42	1.78	2.33	2.38	190.39
2004 Mar	11.14									13.88					13.88	2.34	1.50	1.83	2.39	2.42	193.02
2004 Jun	11.09									12.48					13.61	2.28	1.49	1.81	2.43	2.62	195.13
2004 Sep	10.87									12.21					13.22	2.27	1.46	1.80	2.29	2.52	199.41
2004 Dec	10.49									11.64					12.71	2.18	1.41	1.92	2.32	2.47	197.96
2005 Mar	10.82									11.89					12.21	2.25	1.45	1.88	2.29	2.44	202.24
2005 Jun	11.14									11.82					14.12	2.31	1.50	1.80	2.21	2.37	199.06
2005 Sep	10.94									11.48					13.69	2.28	1.47	1.76	2.06	2.32	199.19
2005 Dec	10.77									11.95					13.18	2.24	1.45	1.88	2.34	2.43	195.00
2006 Jan	10.92									11.89					13.52	2.28	1.46	1.77	2.03	2.36	208.05
2006 Feb	10.95									11.78					13.86	2.30	1.47	1.74	1.99	2.36	201.84
2006 Mar	10.73									11.46					13.53	2.27	1.44	1.75	2.03	2.45	200.79
2006 Apr	10.73									11.21					13.39	2.27	1.44	1.80	2.03	2.38	205.54
2006 May	10.91									11.46					13.55	2.28	1.46	1.89	2.07	2.47	211.00
2006 Jun	10.78									11.42					13.35	2.26	1.45	1.81	2.02	2.48	210.51
2006 Jul	10.91									11.52					13.51	2.30	1.46	1.87	2.11	2.43	213.98
2006 Aug	11.08									12.03					13.74	2.34	1.49	1.91	2.12	2.49	233.08
2006 Sep	11.02									12.13					13.67	2.39	1.48	1.87	2.08	2.51	220.82
2006 Oct	11.15									12.80					13.79	2.38	1.50	1.90	2.14	2.47	223.48
2006 Nov	11.05									12.21					13.47	2.38	1.48	1.95	2.22	2.48	226.45
2006 Dec	11.06									12.19					13.39	2.39	1.48	1.96	2.28	2.48	233.20
2007 Jan	11.28									12.84					13.88	2.46	1.51	1.96	2.32	2.54	238.37
2007 Feb	11.06									12.00					13.71	2.40	1.48	1.97	2.29	2.48	233.37
2007 Mar	10.87									11.84					13.73	2.39	1.47	1.96	2.27	2.43	231.14
2007 Apr	10.82									11.93					13.68	2.41	1.47	2.00	2.23	2.41	230.47
2007 May	10.85									11.95					13.68	2.41	1.47	2.00	2.23	2.41	230.47
2007 Jun	11.05									11.85					13.76	2.46	1.49	2.09	2.31	2.36	237.77
2007 Jul	11.07									11.93					13.69	2.45	1.49	2.09	2.31	2.37	241.14
2007 Aug	11.01									11.76					13.88	2.43	1.48	2.02	2.13	2.46	233.36
2007 Sep	10.66									11.09					13.20	2.37	1.43	2.02	2.03	2.30	234.08
2007 Oct	10.68									11.32					13.16	2.40	1.43	2.07	1.97	2.25	237.14
2007 Nov	10.41									11.32					13.12	2.30	1.40	2.06	2.04	2.34	226.22
2007 Dec	10.11									10.79					12.81	2.25	1.36	1.99	1.95	2.27	225.43
2008 Jan	10.02									10.83					12.66	2.17	1.34	1.99	1.98	2.24	210.49
2008 Feb	9.77									10.32					12.27	2.10	1.31	1.99	1.94	2.10	210.49
2008 Mar	9.41									10.17					11.85	1.99	1.26	1.99	2.03	2.17	198.35
2008 Apr	9.52									10.16					11.82	2.06	1.28	1.98	2.03	2.13	208.43
2008 May	9.49									10.01					11.86	2.07	1.27	1.98	1.95	2.07	208.36
2008 Jun	9.43									10.09					11.91	2.03	1.26	1.99	2.01	2.07	211.39
2008 Jul	9.49									10.20					12.00	2.08	1.27	1.98	2.03	2.10	214.15
2008 Aug	9.27									9.84					11.70	2.00	1.24	1.83	1.92	2.11	200.13
2008 Sep	9.35									10.44					12.19	1.98	1.25	1.81	1.87	2.22	189.73
2008 Oct	9.42									10.89					12.54	1.86	1.27	1.63	1.99	2.43	158.53
2008 Nov	9.01									10.75					12.43	1.86	1.21	1.53	1.90	2.36	146.15
2008 Dec	7.70									10.75					11.37	1.53	1.03	1.43	1.77	2.06	130.33
2009 Jan	8.39									9.96					11.96	1.67	1.12	1.44	1.79	2.27	129.48



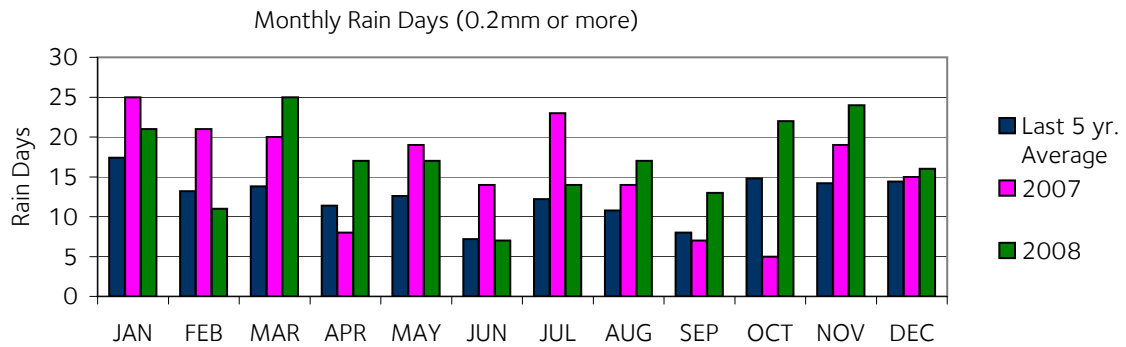
Appendix 20



Figures are recorded at Fort Regent



Figures are recorded at St. Louis Observatory



Figures are recorded at St. Louis Observatory

Source: Jersey Meteorological Department
www.jerseymet.gov.je

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www.jersey.com

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