



# Jersey Tourism

## A Year in Review 2009





## Jersey Tourism Annual Report

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# Foreword from the Minister for Economic Development

My first full year in office as Economic Development Minister has been one of the most challenging which the Tourism Industry has ever faced, and whilst we have endured many difficulties, we should take pride in the performance of the sector during a time when the Industry as a whole has been under significant pressure.

Jersey's performance reflected the mood of the UK with the second half of the year being much more successful than the first and from July onwards business levels picked up and matched the performance of the previous year for leisure visitors. Unfortunately business visitor numbers did not recover and the net result was a decline of 20% in the business sector with corresponding loss of revenue for both carriers and accommodation providers. Business levels from Europe increased and a good performance was recorded from both France and Germany.

Despite the difficult trading conditions, Tourism continues to be a valuable contributor to the Jersey economy accounting for an estimated £226 million spend on Island during 2009. Whereas previously the spend resulted in business and personal tax take for the Government we now have the additional benefit of GST revenue which at 3% will have added nearly £7 million to our States income. This is a valuable contribution at a time of fiscal deficits and adds to the importance of the visitor economy.

However the value of Tourism has to also be measured in social as well as economic terms as the infrastructure plays such an important role in securing the services which are essential to maintaining the quality of life for local residents. The range of air and sea services, the huge choice of restaurants, the bus service, the heritage and other attractions, are just a few examples of how visitor spend is sustaining the services which we tend to take for granted. There can be no doubt that Jersey would be a much less attractive place to live without visitors providing, if one is needed, a further strong reason to continue to support the Industry.

Both the Jersey Heritage Trust and Durrell have experienced serious challenges during the past year which are due in part to a reduction in visitor revenue. These are vital attractions which are very much appreciated by visitors and must be given every possible assistance as we move forward.

The latest visitor survey shows that over 40% of all visitors went to Durrell, 25% Mont Orgueil and 20% Elizabeth Castle, with 83% indicating the importance of Jersey's history and heritage. These are compelling statistics in recognition of the importance of these attractions.

There can be no doubt that the success achieved in 2009 could in some measure be attributed to the enormous private sector investment which had taken place in recent years to upgrade hotel facilities. The investment was particularly noticeable among the 4\* operators where many millions had been invested in the recent past. With the more discerning customer which Jersey is now attracting this investment will continue to hold the Island in good stead for the future. The prospects for air and sea transport in 2010 are looking positive with most routes being sustained and some new ones being added.

An annual review would be incomplete without reference to the many fantastic events which take place throughout the year. Jersey is indeed fortunate to have such a wide and diversified programme with at least one event taking place every week of the Summer and for most weeks in the shoulder and Winter periods. The Battle of Flowers and International Air Display were once again the high points of the Summer and I would take this opportunity of thanking all of the volunteers for making both these and the other marvellous events so successful. Jersey is fortunate to have so many who are prepared to give their time and expertise to the overall benefit of the community.

I would also like to take the opportunity of recognising the contribution of my two Ministerial colleagues, Connétable Len Norman and Senator Paul Routier who join me in thanking all of the departmental staff for their superb efforts through out the year and for helping to make 2009 a success despite the difficult conditions in which we had to operate.

**Senator Alan Maclean**  
**Minister for Economic Development**

# Annual Report 2009

A great performance in Europe set against poor returns from the UK market defined Jersey Tourism performance in 2009, a year of global recession and fierce competition.

There can be no doubt that European visitors were influenced by the increased value which Jersey and other sterling area represented leading to an increase in staying leisure visitors of 9.4% from France and 7.2% from Germany. These increases are set to continue and further expansion of air and sea routes in 2010 will be a strong encouragement from those important source markets.

In the UK, where perhaps the economic conditions were more unfavourable than Europe, the domestic market was buoyant with increased demand for so called "staycation" products as UK residents avoided overseas visits in the euro currency zone. Overseas destinations outside of the euro zone such as Turkey and Egypt also experienced significant increases from British visitors. Throughout the year enquiry levels for Jersey achieved record levels but these did not convert to visits, particularly during the first half of the year when a drop of 13% in staying leisure visits was experienced. A strong and extended marketing campaign helped to improve the position during the second half of the year, bringing the overall decline back to 6.6% from the UK and overall 3.8%. Business visitors declined by an average of 17% reflecting the travel restriction policies employed by the corporate sector.

The marketing campaigns were significantly boosted by the additional funding of £800k which was provided to support the mid and late season which provided the stimulus for the second half recovery. The contribution of £50k by the Jersey Hospitality Association formed part of the additional funding and was recognised as an important step towards greater Industry cooperation.

The Department has embarked on a number of initiatives which will increase Industry awareness and involvement in our activities.

Tourism Week is our new on-line newsletter published every Friday and sent to a database of around 3,000 Industry members. The content includes current advertising and PR activities as well as updates on a broad range of initiatives, to ensure that, at the very least, our stakeholders are aware of what is going on throughout the Industry.

The Tourism Task Force - formed in the Autumn of 2008, in response to the threat presented by the economic down turn - met several times during the year and proved to be a valuable conduit for exchanging information and for discussing a broad range of key issues including campaign timing and the monitoring of business performance during some of the more difficult trading periods.

Jerseypass has proved to be a great success during its first full year of operation and is now being sold through tour operators as well as on line from Jersey.com and through local retail outlets. The concept of having an inclusive price for the 28 attractions and activities is proving extremely popular with our visitors and is helping to increase the footfall in this key area of product offering.

Joint marketing initiatives either in the form of online special offers or the more traditional joint advertising will continue to form an important part of the marketing strategy.

Jersey.com and particularly the special offer section is an ideal communication vehicle for Jersey products and with an average of 75k unique visitors to site each month, has the exposure to deliver the best potential return. All Jersey Tourism advertising carries the Jersey.com URL.

## Marketing Jersey in 2009

With the deepest recession in over fifty years, 2009 was going to be different from the outset. The world would become a different place and holidays and booking patterns would change.

The euro exchange rate presented an opportunity in all our key markets. It was cheaper to visit from Europe and Jersey was perceived as cheaper in pounds sterling than euro destinations. The steep decline in business visitors was having an immediate impact on transport and accommodation providers, which led to an increase in leisure marketing from many within the sector.

We developed a new positioning statement which we used throughout our 2009 advertising to capitalise on the euro opportunities: "Europe without the euro". This proved to be very popular with consumers and was adopted by many of our stakeholders in their own marketing material.

Through consultation with Industry stakeholders, additional Government funding was made available for Tourism marketing. This enabled us to extend our TV and press campaign. We also had the added benefit that advertising costs dropped dramatically as media owners tried to tempt advertisers, which led to an average discount of over 70% across all our advertising purchases.

We increased our Summer activity with this extra funding and also reduced our Autumn and Winter campaigns to maximise the high season. All the ads that we ran incorporated price-led offers taken from the jersey.com special offer pages.

The campaign performed extremely well, with web traffic and brochure requests all significantly up year-on-year, leading to additional accommodation guides being printed and distributed. The extra funding also meant that we were able to run a poster campaign in large format motorway boards which were positioned strategically across the UK near departure points and visitor hot spots based on post code analysis.

### Key media facts

- We achieved significant share of voice during 2009 and were ranked 5th within the top spending UK destination advertisers and 6th in the world wide market.
- 8.5 million, UK, ABC1 adults will have seen a Jersey TV ad at least once, but on average will have seen it 9 times.
- Over 50% of TV was delivered on terrestrial channels in the top 20 programmes.
- Press brand performance showed a coverage of nearly 9 million ABC1 adults in our key markets, 89% coverage was achieved.
- Our gross press impacts for 2009 was 279,547,000 (this is the number of people reached x the number of times they see the advertising), an increase of 115% on 2008 due to increased budget and reduced media costs.

## 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, plus it will include questions about holiday taking and our competitors.

The economic situation during 2009 clearly made an impact on holiday decision making, with the situation worsening from our first research wave in November 2008 to March 2009. During this period 10% of our target market said that they were “going to wait and see” - this ultimately led to the booking market becoming later than it had ever been.

The Jersey TV campaign continues to receive good recognition with the campaigns over the last 3 years building on each other. 2009 was our strongest year with 24% recognition of unbranded TV - this is up from 18% in 2007. These findings point to no evident wear out of the campaigns and, indeed, some potential brand building effect on recall from the familiarity with the evolving style of the campaigns.

The outstanding success of 2009 was the Summer poster campaign. We have not used posters in any significant way for destination branding for a number of years and developed a 11% recall in just one wave of the campaign. These encouraging results for posters will lead us to reassess posters in a bigger way for 2010.

## Public Relations Activity – 2009

### Overview

The Public Relations team celebrated another successful year of editorial coverage in 2009.

Campaigns were undertaken primarily in the UK, France and Germany with subsidiary activities conducted in the Netherlands, Belgium, Ireland and the other Channel Islands.

Other international media activity was conducted with industry partners and VisitBritain, the national agency promoting incoming tourism to Britain. International media visits included those from Spain, Switzerland, Austria, Czech Republic, China, Japan, Norway and New Jersey.

A key element of the PR campaigns is the facilitation of media visits to the Island. In 2009 the team facilitated visits covering 195 print media, 27 TV & 7 radio productions, and 20 on line sites.

## UK

In the UK PR activity was conducted nationally and regionally in conjunction with the main Jersey Tourism advertising campaign, with a particular emphasis being placed on communicating product areas and messages not easily conveyed through advertising.

### Results

- 1207 Tourism related articles were produced, an increase from 1016 in 2008.
- 65% of adults were reached by the coverage, with each adult being reached approximately 15.6 times.
- 31.6 million adults were reached.
- 99% of coverage was favourable.
- All media release and media visit coverage was favourable, demonstrating the importance of this coverage in driving strongly favourable articles.
- Cost per thousand people reached: 33p.
- The advertising equivalent of the coverage is £8.48 million.



### Key findings

The Times was the most prolific national publication with 24 articles and the BBC the most prolific online site with 27 articles. Adults who take short breaks in the UK are 7% more likely to be above the national average to visit BBC Online (Metrica's UK Pulse Survey).

71% of strongly favourable articles delivered the "Jersey is an ideal place to take time out" message and the focus was predominantly on Jersey as a short break destination (39% of all coverage).

### Key stories

- Aurigny, Air Southwest, Flybe and Jet2.com announce new regular charter services to Jersey, while BMI terminates its Heathrow to Jersey route.
- The Jersey Live Festival takes place for its sixth year and boasts performances from Basement Jaxx, Doves, Frank Turner, Dizzee Rascal and Jamie T.
- Jersey hosts the 2009 European Surfing Championships as the Jersey Surfboard Club celebrates its 50th anniversary.
- Jersey Boat Show takes place.
- Marilyn Monroe's costumes are exhibited at the Jersey Museum.
- Jersey launches a new travel insurance policy for independent visitors to the Island after UK reciprocal healthcare arrangements are changed.
- A new advertising campaign is launched pitching Jersey as "Europe without the euro". A related survey reveals that many people in mainland Britain are unaware that sterling is the currency of Jersey.
- Hotels.com and Premier Holidays both report a 33% rise in the number of UK holidaymakers travelling to the Channel Islands, which is attributed to the recent development and overhaul of Jersey's image and tourist facilities, along with the weakness of the pound.
- Jersey is named as having the best beaches in the Channel Islands according to the "22nd Annual Good Beach Guide".

## TV Coverage

### Jersey received significant TV coverage again in 2009 which included;

- ITV "This Morning" Marilyn Monroe exhibition at Jersey Museum.
- BBC 1 "The One Show" at Jersey War Tunnels.
- BBC 1 "Antiques Road Show" at Samares Manor.
- BBC "Breakfast" The Ultim8 Adventure race organised by Jersey Adventures.
- BBC 1 "Blue Peter" in partnership with Condor Ferries.
- BBC 2 "Tatton Park" at Durrell.
- Channel Five "Animal Heroes" at Durrell.
- Eurosport Rubis Town Criterium.
- Five TV "Gadget Show" testing cameras at Jersey locations.

## Fifteen Event

The initiative for Jersey produce to be featured in Jamie Oliver's Fifteen Restaurant was instigated and facilitated to a great extent by the PR team. Resultant exposure - for example; the Jersey Royal featuring on Barack Obama's plate at Downing Street, was one of the many successful editorial opportunities that were achieved as a result of the initiative.

Fifteen have subsequently described the initiative to their franchisees as an example of great practice. The initiative is to be repeated in 2010.

## France

In France the PR activity was run alongside the Tourism advertising campaign. It was concentrated in the Grand Ouest region, where the majority of Jersey's visitors and travel links originate.

### Results

- 63 Tourism related articles were produced.
- 100% of coverage was favourable.
- The proportion of strongly favourable items increased year on year, from 28% in 2008 to 35% in 2009.
- Press release and press visit articles helped to drive this strongly favourable coverage, accounting for 59% of it.

### Key messages

- Message delivery was strong within press release coverage, with 95% of articles delivering at least one key message.
- Half of the 22 strongly favourable items also included an image and 45% included the URL, which will have boosted the impact of the article to the reader.
- The "Ease of access to the Island" message was the most prolific and featured in 41% of articles - an improvement on last year's 33%. This message was driven by news of the opening of new transport channels to the Island.
- The messages "Jersey is an ideal place to take time out" and "Jersey has a unique and interesting heritage and culture" also featured in 33% of coverage, up from 24% in 2008.
- "Short breaks" was the most prominent holiday type in coverage, being mentioned in 21 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.
- Nearly half of all short break coverage was strongly favourable and 10 of the 22 articles were generated by press releases.
- Articles focused on the appeal of the exhibition of Marilyn Monroe costumes, shopping and family activities.

### Key stories

- Investments have been made in tourist facilities to help diversify the economy away from its dominance by financial services and to develop its "green" status with extensive resources for cyclists and walkers.
- An exhibition of Marilyn Monroe costumes is held on Jersey.
- The European Surfing Championships take place at Jersey Surf Club, the oldest surf club in Europe.
- Condor Ferries is the only ferry company operating a service to the Channel Islands from France, following the withdrawal of HD Ferries.
- Aurigny Air services is to start a daily service between Jersey and Stansted.
- Lucy O'Sullivan is crowned "Miss Battle of Flowers" 2009.
- Advertising company LM Y & R launch a French advertising campaign for Jersey, with a focus on promoting Jersey as a close and relaxing destination for short breaks.
- An analysis of ferry services to the Channel Islands from La Manche concludes that passenger numbers have fallen sharply in the last two years, partly through competition from daily services operated out of St Malo.

## Tour de Bretagne (TDB) 2010

Further to the initiative to bring the TDB to Jersey in 2007 the PR team has nurtured and capitalised on the relationship to good effect. TDB is to return to Jersey in 2010 for two stages and the resultant publicity with FR3 and Ouest France has been hugely successful.

The TDB invited and hosted Jersey to the St Brieuc Championnat de France in 2009. Patron Bernard Hinault scoring a media coup for the event and Jersey with an announcement on live National TV during the Championnat that the 2010 event was commencing in Jersey.

The potential benefits have been expanded beyond Tourism to develop opportunities for the Island economy, culture and in particular a political perspective with the potential for the President of Brittany to attend the event in 2010.

#### **Note:**

The Tourism Development Fund has secured the event for the Island in 2010 funding the event the value of 50,000 euros.

It should also be noted that Condor are significant partners in the TDB and have gone to great lengths to accommodate the race and its entourage numbering more than 400 persons and 22 international teams. Condor Clipper has been diverted from its Northerly schedules in order to assure the event is safely delivered in a timely and robust fashion.

## Germany

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

### Results

- Coverage volumes increased by 49% year on year from 561 to 834 articles. In particular, regional press which accounted for 86% of coverage. This included 2 TV programmes on Deutsche Welle.
- 25.2 million adults were reached.
- The advertising equivalent of the coverage is £4 million.
- The volume of regional coverage peaked in July. This was driven by news of the Flower Carnival, when "around 20,000 visitors are expected to come and see the parade of flower-adorned carriages".
- All coverage was favourable, 68% strongly so, an exceptional result and massive increase from 17% in 2008.
- This was driven by press release coverage and press visit coverage, which collectively made up 69% of strongly favourable coverage.
- Strongly favourable coverage was driven by regional competitions to win short breaks in Jersey, such as a week-long competition on Klassic Radio.
- Also prominent were positive reviews of package deals for short breaks. Tour Operator Kath Ferienwerk Gladbeck described Jersey as a "dream island for soul, mind and body" (Westdeutsche Allegmaine series).

### Key messages

- Explore (outdoors/active) was the most prolific product cluster, featuring in 75% of articles, an increase from 67% last year.
- Mentions were boosted by press release driven items on activities such as walking, cycling and private gardens, along with news of events including the Airshow "Battle of Britain" and the Surfing Championships.
- These articles helped to boost delivery of the "Jersey is an ideal location for activity-based holidays" message, which was delivered in 55% of all coverage, and 74% of articles in the Explore (outdoors/active) category.
- Short breaks were the most prolific holiday type, featuring in 40% of coverage (331 articles). This was a significant increase from 2008, when very few articles featured a holiday type. In particular, short breaks, despite being the most prolific holiday type, only featured in 2% of coverage.
- 40% of articles mentioned a holiday type in 2009 and of these, 98% were strongly favourable. This demonstrates an increased focus and depth in coverage and the resulting beneficial tone communicated to the reader.

### Key stories

- The European Surfing Championships take place.
- Air Berlin begin a weekly service to Jersey during the Summer.
- The Battle of Flowers is held in Jersey.
- Jersey celebrates its yearly Flower Carnival.
- The Seafood Festival takes place.
- Guided cycle tours are available on Jersey.
- Private gardens on Jersey are opened to visitors from April.
- Jersey stages an Airshow "Battle of Britain", showcasing historic bombers, parachutes and air acrobats.

# Product Development and Events – 2009

## Events

Three of the Island's major events received financial support in 2009 including the International Air Display, Battle of Flowers and the Jersey Senior's Classic Pro Am golfing event. The majority of externally organised events including Branchage, Jersey Fish Festival and the Town Criterion Cycle Race also received support and assistance from the Events team in terms of event planning and infrastructure development.

Seven events were developed and implemented by the Tourism Events team, including a resurrection of "June in Bloom" – a week long festival celebrating all things floral including the very best private gardens, woodlands and natural habitats which saw most of the events being oversubscribed including an open garden at Government House.

The Product team's objectives are to drive new business to the Island, primarily in the off season and to enhance the visitor experience. This task got off to a busy start in May when the team staged a 1940's themed Liberation Day event at the newly opened and purpose built event space at the Weighbridge together with the Gorey Fete de la Mer seafood event and the "Spring Walking" festival. This latter event attracted over 908 walkers – an increase of 9% on 2008, an increase which was mirrored with the Autumn Walking week which attracted 1005 walkers.

Other food related events included "Black Butter" making at the Elms – in conjunction with the National Trust for Jersey. This event was attended by a food writer and photographer from the Country Living magazine together with a journalist from the "Food Tripper" website proving that even Jersey's heritage food product is worth talking about!

La Fête dé Noué took place from 26th November to 26th December and enabled Sunday trading activity to take place during this period. Highlights included the Christmas markets, the Christmas Parade and a lantern procession through the streets of St Helier. This event is supported by the travel trade, principally Condor and Travtel and 2009 saw a new tour operator, Newmarket Travel, bringing over groups throughout the event. The team commissioned the building of bespoke wooden chalets, to accommodate artisans and craft workers to improve the product.

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 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" had 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

In addition to the specific events programme supported by the department, financial support was provided to Durrell as part of its 50th anniversary celebrations. This included an al fresco theatre production with the Jersey Arts Centre based on Gerald Durrell's books which ran throughout the high season and to Jersey Heritage Trust for La Fais'sie d'Cidre (Cider Festival). The Band of the Island of Jersey was also supported and provided regular entertainment at Howard Davis Park.

### Branding and distribution

Work continued on improving the visitor experience and improvements were made to areas such as Gorey with new flags and banners.

### Product development

The department introduced an industry based pilot study with the UK based Green Tourism Business scheme [www.green-business.co.uk](http://www.green-business.co.uk). 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). The pilot study concluded with La Mare Wine Estate gaining a Gold award, 10 companies gaining Bronze or Silver awards with 2 awaiting grading.

"Night Markets" took place throughout the year from April to October. A new initiative, these farm and craft markets took place in the Weighbridge with live music and al fresco dining, aimed at enlivening St Helier in the evenings and supporting new business developments in this area. 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" with new walking routes and heritage trails developed for [www.jersey.com/walking](http://www.jersey.com/walking). This work has borne fruit with a third of all visitors coming to the Island to walk.

Work continues on the development of a Channel Island Way. A "one hundred mile" walk around the Channel Islands in conjunction with neighbouring Tourism partners. To date Jersey and Guernsey have been completed and 2010 will see the completion of a coastal route and accompanying visitor information for Alderney, Sark and Herm.

200+ guided walks were provided to visitors from April through to September with 1,300 visitors participating with Blue Badge Guides.

Other initiatives included the development of a picnic guide to the top ten National Trust for Jersey sites aimed at encouraging visitors to walk and cycle to some of the most beautiful areas in the Island, an "Afternoon Tea" guide to local hotels and cafes and a "Market" guide to farm and craft markets, farm shops and the Victorian Central and fish markets.

Event and product information was managed by the Product Development team on [www.jersey.com](http://www.jersey.com) and in marketing publications such as "What's On".

## The Conference Market

The conference market is one of the most competitive and competition has been intense, particularly in the corporate sector in which a number of events have been postponed due to the difficult economic climate. The Association sector has had a successful year which has offset the loss in corporate events and overall the figures are an increase on 2008.

Residential conference delegate numbers rose to 9,241 in 2009 from 9,200 in 2008.

The number of events was static increasing by 1 to 304 events in 2009. The number of corporate delegates was 3,689 while the number of Association delegates was 5,552.

The number of bed nights sold increased by 4% from 36,450 in 2008 to 38,097. 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 the Gold Award from MIMA for the 3rd year in succession for the best destination brochure.

# Jersey 10 point strategy for dealing with the economic downturn

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 £1 million, 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

	2009 Actual £000	2008 Actual £000
<b>Corporate</b>		
Strategy and policy	1,132	1,224
Research and planning	221	186
<b>Communications</b>		
Advertising and media	2,181	1,845
Distribution	247	191
Marketing services	540	431
Product development	822	906
<b>Market development</b>		
Public relations	553	562
Trade relations	691	977
Consumer and media relations	895	675
Visitor services	301	324
<b>Net revenue expenditure</b>	<b>£ 7,583</b>	<b>£ 7,322</b>

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

## Key financial results

Total net revenue expenditure for 2009 increased by £261,000 (4%) when compared with 2008.

### Corporate expenditure decreased by £5,700 (-4%)

The decrease in Corporate Strategy and Policy expenditure was mainly due to a reduction in route development. In addition, during 2008 there was a one-off cost of £15,000 for part funding of the ice-rink.

### Communications expenditure increased by £417,000 (12%)

Due to difficult trading conditions that the Island is experiencing a decision was taken to fund additional marketing spend (£800,000) on the Autumn campaign.

Tourism received £50,000 from the Jersey Hospitality Association and a £250,000 grant from the Tourism Development Fund.

An additional budget of £200,000 from the Economic Growth Fund together with budget transfers of £300,000 from other service areas within EDD.

During 2008 additional one-off funds of £460,000 was received in response to the Historic Child Abuse Enquiry (HCAE) resulting in an actual expenditure increase of £877,000.

### Market development expenditure decreased by £98,000 (4%)

The decrease is mainly due to a reduction in Trade activity and an increase in consumer activity. Visitor Services also had a decrease of £23,000 due to a reduction in seasonal staff.



## **Notes on Volume and Value Calculations**

### **Visitor volume**

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

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

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

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

The methodology is very similar to 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.

2009 visitor volume figures are based upon results from the 2009 exit survey. 2008 visitor volume estimates have been revised based upon a statistical smoothing process using data from the 2007 and 2009 exit surveys.

### **Visitor expenditure**

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

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

**SUMMARY OF TOP-LINE FIGURES 2005 - 2009**

	<u>2005 Jersey Travel Survey</u>		<u>2007 Jersey Travel Survey</u>		<u>2009 Jersey Travel Survey</u>	
	<b>2005</b>	<b>2006</b>	<b>2007</b>	<b>2008</b>	<b>2009</b>	<b>2009 vs. 2008</b>
<b>On-Island Visitor Expenditure</b>	<b>£220 million</b>	<b>£221 million</b>	<b>£234 million</b>	<b>£239 million</b>	<b>£226 million</b>	<b>-5.1%</b>
<b>On-Island Visitor Expenditure Reflated to 2009 levels</b>	<b>£255 million</b>	<b>£248 million</b>	<b>£251 million</b>	<b>£245 million</b>	<b>£226 million</b>	<b>-7.7%</b>
<b>Total Tourism Visitor Volume</b>	<b>752,300</b>	<b>728,500</b>	<b>739,300</b>	<b>726,400</b>	<b>682,700</b>	<b>-6.0%</b>
<b>Total bed nights sold over year</b>	<b>2.14 million</b>	<b>2.07 million</b>	<b>2.08 million</b>	<b>2.03 million</b>	<b>1.89 million</b>	<b>-7.0%</b>
<b>Total room nights sold over year</b>	<b>1.04 million</b>	<b>1.02 million</b>	<b>1.03 million</b>	<b>1.00 million</b>	<b>0.91 million</b>	<b>-9.0%</b>
Staying Leisure Visitor Volume	<b>380,900</b>	<b>368,200</b>	<b>375,900</b>	<b>362,300</b>	<b>340,500</b>	<b>-6.0%</b>
Staying Leisure Visitor Average Stay	<b>4.8</b>	<b>4.8</b>	<b>4.6</b>	<b>4.4</b>	<b>4.4</b>	<b>-2.2%</b>
Staying Leisure Visitor On-Island Expenditure	<b>£155 million</b>	<b>£155 million</b>	<b>£160 million</b>	<b>£158 million</b>	<b>£150 million</b>	<b>-5.2%</b>
Staying Leisure Visitor On-Island Expenditure Reflated to 2009 levels	<b>£181 million</b>	<b>£175 million</b>	<b>£172 million</b>	<b>£163 million</b>	<b>£150 million</b>	<b>-8.0%</b>
Staying Business Visitor Volume	<b>56,600</b>	<b>61,600</b>	<b>72,000</b>	<b>69,700</b>	<b>57,700</b>	<b>-17.2%</b>
Staying Business Visitor Average Stay	<b>2.2</b>	<b>2.1</b>	<b>2.2</b>	<b>2.3</b>	<b>2.3</b>	<b>-0.9%</b>
Staying Business Visitor On-Island Expenditure	<b>£17 million</b>	<b>£19 million</b>	<b>£24 million</b>	<b>£25 million</b>	<b>£21 million</b>	<b>-15.1%</b>
Staying Business Visitor On-Island Expenditure Reflated to 2009 levels	<b>£19 million</b>	<b>£20 million</b>	<b>£25 million</b>	<b>£26 million</b>	<b>£21 million</b>	<b>-18.0%</b>
Staying Conference Visitor Volume	<b>5,900</b>	<b>8,800</b>	<b>9,700</b>	<b>9,200</b>	<b>9,200</b>	<b>0.5%</b>
Staying Conference Visitor Average Stay	<b>3.2</b>	<b>3.4</b>	<b>3.0</b>	<b>4.0</b>	<b>4.1</b>	<b>3.8%</b>
Staying Conference Visitor On-Island Expenditure	<b>£3.1 million</b>	<b>£5.0 million</b>	<b>£5.3 million</b>	<b>£5.5 million</b>	<b>£5.6 million</b>	<b>1.9%</b>
Staying Conference Visitor On-Island Expenditure Reflated to 2009 levels	<b>£3.5 million</b>	<b>£5.4 million</b>	<b>£5.4 million</b>	<b>£5.7 million</b>	<b>£5.6 million</b>	<b>-2.0%</b>
Day Trip Visitor Volume	<b>145,700</b>	<b>139,400</b>	<b>141,900</b>	<b>143,200</b>	<b>134,500</b>	<b>-6.0%</b>
Day Trip Visitor On-Island Expenditure	<b>£6.7 million</b>	<b>£6.3 million</b>	<b>£7.5 million</b>	<b>£7.9 million</b>	<b>£7.7 million</b>	<b>-2.7%</b>
Day Trip Visitor On-Island Expenditure Reflated to 2009 levels	<b>£7.1 million</b>	<b>£6.6 million</b>	<b>£7.9 million</b>	<b>£8.0 million</b>	<b>£7.7 million</b>	<b>-3.6%</b>
Hospitality sector <u>companies</u> tax revenue <sup>1</sup>	<b>5.9 million</b>	<b>5.3 million</b>	<b>5.5 million</b>	<b>n/a</b>	<b>n/a</b>	
Hospitality sector jobs <sup>2</sup>	<b>6,110</b>	<b>6,160</b>	<b>6,210</b>	<b>6,060</b>	<b>5,980</b>	<b>-1.3%</b>
Registered accommodation establishments	<b>166</b>	<b>161</b>	<b>159</b>	<b>145</b>	<b>142</b>	<b>-2.1%</b>
Registered tourism bed spaces <sup>3</sup>	<b>13,400</b>	<b>13,100</b>	<b>13,100</b>	<b>12,800</b>	<b>12,000</b>	<b>-5.7%</b>
Total bed nights available over year	<b>3,394,400</b>	<b>3,395,800</b>	<b>3,351,300</b>	<b>3,485,600</b>	<b>3,345,500</b>	<b>-4.0%</b>
Average yearly bed space occupancy	<b>63%</b>	<b>61%</b>	<b>62%</b>	<b>58%</b>	<b>56%</b>	<b>-2 % points</b>
Average yearly room space occupancy	<b>70%</b>	<b>67%</b>	<b>69%</b>	<b>65%</b>	<b>61%</b>	<b>-4 % points</b>
August bed space occupancy	<b>89%</b>	<b>82%</b>	<b>84%</b>	<b>83%</b>	<b>84%</b>	<b>+1 % point</b>
August room space occupancy	<b>92%</b>	<b>88%</b>	<b>90%</b>	<b>87%</b>	<b>86%</b>	<b>-1 % point</b>
Total booking revenue generated by JerseyLink	<b>£1.3 million</b>	<b>£1.5 million</b>	<b>£1.6 million</b>	<b>£1.2 million</b>	<b>£1.3 million</b>	<b>8.3%</b>
www.jersey.com - Total Unique Visitors <sup>4</sup>		<b>1,417,800</b>	<b>1,602,000</b>	<b>n/a</b>	<b>986,200</b>	

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

<sup>2</sup> The Hospitality sector as defined by the Manpower Survey consists of tourism related accommodation, restaurants and bars. The figures are from the Manpower Survey, June 2009 (Statistics Unit, Policy and Resources Department). Again the hospitality sector alone does not constitute the full impact of tourism upon employment in Jersey.

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

<sup>4</sup> Total number of visitors identified by PC IP address and cookies, including repeats. Total Visitors stats were not calculated in this way pre 2006. 2008 data was incomplete.

## Jersey Tourism 2009

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 reflated 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.

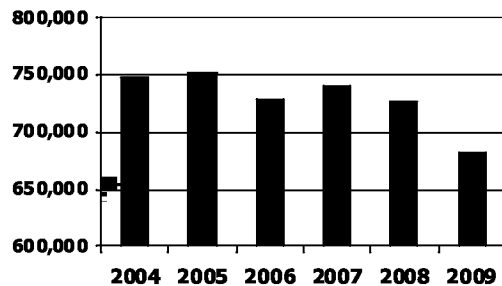
The following summary of 2009 results emphasises the importance and impact of the tourism industry in Jersey.

- 682,700 Visitors.
- 340,500 Visitors staying in paid accommodation for leisure purposes.
- 76% of staying leisure visitors were from the UK representing 83% of total staying leisure visitor bed nights sold.
- Almost 1.9 Million overnight stays (bed nights sold) in paid accommodation (excluding visiting yachts).
- £226 million estimated on-island visitor spend.
- £113 million estimated visitor spend on accommodation.

#### 1.2 Total Visitor estimates

Figure 1 below shows that the number of visitors decreased by 6% from 726,400 in 2008 to 682,700 in 2009, following a fall of 1.7% between 2008 and 2007.

**Figure 1 Total visitor volume 2004-2009**

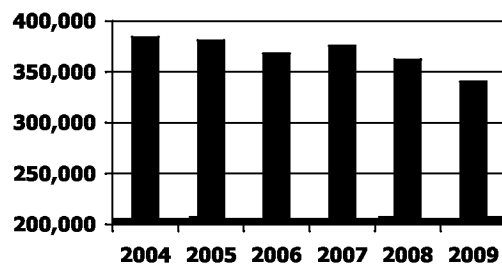


A full breakdown of total visitor numbers can be found in **Appendix 1** in the 2009 Annual Report at [www.jersey.com/marketingInfo](http://www.jersey.com/marketingInfo).

#### 1.3 Staying Leisure Visitors

Figure 2 below shows how total staying leisure visitor volume decreased by 6% from 362,300 in 2008 to 340,500 in 2009, following a fall of 3.6% between 2008 and 2007.

**Figure 2 Staying leisure visitors 2004-2009**



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 5.8% from 95,500 in 2008 to 101,000 in 2009. In addition to this, circa 5% of leisure visitors staying in paid accommodation claim a visit to friends and relatives as their main purpose of visit, with a further 6% claiming this to be a secondary purpose (Staying Leisure Visitor Survey 2008).

Based upon the 2009 Travel Survey it is estimated that 89% of the VFR market traveled to Jersey by air and the breakdown by country of residence was as follows:

**Table 1 Visiting friends and relatives (VFR) volumes by market 2009**

	<b>Volume</b>	<b>%</b>
<b>UK</b>	<b>81,190</b>	<b>80%</b>
<b>Other CI</b>	<b>3,500</b>	<b>3%</b>
<b>Ireland</b>	<b>3,110</b>	<b>3%</b>
<b>France</b>	<b>2,840</b>	<b>3%</b>
<b>Portugal</b>	<b>1,630</b>	<b>2%</b>
<b>Other</b>	<b>8,740</b>	<b>9%</b>

Those staying with friends and relatives spend slightly longer in Jersey than visitors in paid accommodation, with an average length of stay in 2009 of 6.2 nights. The VFR market therefore accounted for 623,200 overnights stays (bed nights) in Jersey in 2009.

### 1.5 Language Students

Visiting language student numbers decreased by 13% from 2,850 in 2008 to 2,480 in 2009.

Language students in 2009 are estimated to have stayed in Jersey for an average of 12 nights, with the total market accounting for 28,900 nights. The majority of students stay with host families which puts a constraint upon the maximum size the language student market can achieve.

### 1.6 Business Visitors

The business market is estimated to have decreased by 15.7% from 105,400 in 2008 to 88,900 in 2009.

In 2009 the number of staying (one or more nights) business visitors decreased by 17% to 57,700, with business day visits also decreasing by 13% to 31,200.

The decrease in staying business visitor volume, coupled with a slight decrease in average stay accounted for 131,600 bed nights sold, 18% less than in 2008.

### 1.7 Visiting Conference Delegates

Residential conference delegate numbers increased by 0.5% from 9,190 in 2008 to 9,240 in 2009.

The number of conferences increased by just 1 from 303 in 2008 to 304 in 2009. The number of Corporate delegates was 3,690, while the number of Association delegates was 5,550.

However, the number of bed nights sold increased by 4.5% from 36,450 in 2008 to 38,100 in 2009.

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

### 1.8 Visiting Yachtsman

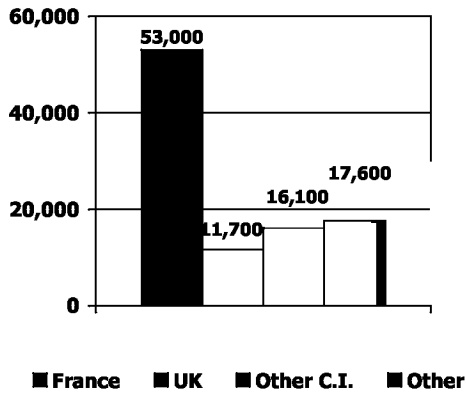
The number of visiting yachtsmen increased by 7.5% from 19,900 in 2008 to 21,400 in 2009, staying an average of 2.3 nights, slightly lower than in 2008.

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

### 1.9 Leisure Day Trips

Leisure day trip visits increased by 1.7% from 96,700 in 2008 to 98,400 in 2009.

**Figure 3**  
**Breakdown of leisure day trip visitors by market**



Source: 2009 Travel Survey

### 1.10 Visitor Expenditure Estimates

Total on-Island expenditure in 2009 is estimated at £226 million.

In real terms, if the total 2008 expenditure figures are reflatd to 2009 values, tourism expenditure in Jersey in 2009 decreased by 7.7%.

Table 2 shows a breakdown of estimated on-Island visitor expenditure by visitor type 2009 vs. 2008.

**Table 2 Total visitor spend 2009 vs. 2008**

	2008 value of market 000's	2009 value of market 000's	% change
Staying Leisure Visitors	£158,247	£150,092	-5%
Visiting friends/relatives	£25,475	£27,588	8%
Language students	£2,053	£1,648	-20%
Leisure day visitors	£4,877	£5,373	10%
Visiting yachtsmen	£1,958	£1,999	2%
Business visitors	£27,324	£23,275	-15%
Conference delegates	£5,489	£5,596	2%
Other visitors	£13,272	£10,833	-18%
<b>Total visitor spend</b>	<b>£238,695</b>	<b>£226,400</b>	<b>-5%</b>

N.B. 2008 figures are not reflatd.

Table 3 shows a breakdown of estimated on-Island visitor expenditure per visitor by visitor type 2009 vs. 2008.

**Table 3 Spend per Visitor 2009 vs. 2008**

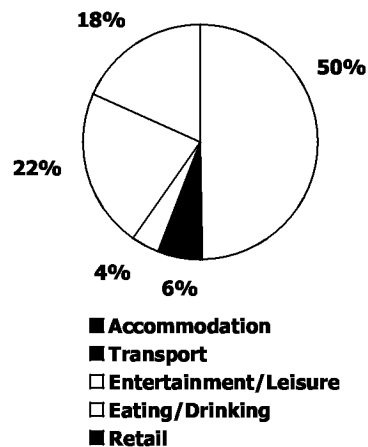
	2008 spend per visitor	2009 spend per visitor	% change
Staying Leisure Visitors	£437	£441	1%
Visiting friends/relatives	£267	£273	2%
Language students	£720	£665	-8%
Leisure day visitors	£50	£55	9%
Visiting yachtsmen	£98	£93	-5%
Business visitors	£259	£262	1%
Conference delegates	£597	£606	1%
Other visitors	£384	£522	36%
<b>Average spend per visitor</b>	<b>£328</b>	<b>£332</b>	<b>1%</b>

N.B. 2008 figures are not reflatd.

### Breakdown of on-Island visitor spend 2009

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 200 - £226m**



Source: 2007 Visitor Expenditure Survey

The above shows that more than half of visitor expenditure is on the accommodation element of a stay in Jersey, although this percentage is reduced by visitors who do not stay in paid accommodation (VFR, day trips etc.). 22% of visitor expenditure is spent in restaurants, pubs and cafés, 6% on on-Island transport, and 18% on miscellaneous items which are mainly retail.

Visitor expenditure estimates are based upon the most recent visitor expenditure survey undertaken in 2007, but reflatd to 2009 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**

<b>1999</b>	<b>£5.9 million</b>
<b>2000</b>	<b>£5.2 million</b>
<b>2001</b>	<b>£4.9 million</b>
<b>2002</b>	<b>£5.0 million</b>
<b>2003</b>	<b>£5.0 million</b>
<b>2004</b>	<b>£5.9 million</b>
<b>2005</b>	<b>£5.9 million</b>
<b>2006</b>	<b>£5.3 million</b>
<b>2007</b>	<b>£5.5 million</b>

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

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

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

*Tax revenue figures for previous years have not been reflatd for direct comparison with 2007.*

## 2. Profile of Staying Leisure Visitors

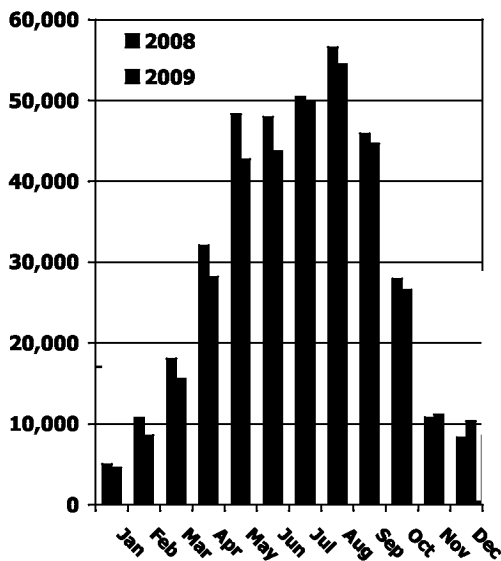
The following tables concentrate on **staying leisure visitor** trends, with the data derived from those visitors staying in registered accommodation that filled in visitor registration cards and stated that their main purpose of visit was "holiday" or "sport".

### 2.1 Visitors by Month

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

Figure 5 shows that 2009 started off poorly, with May and June performing particularly badly compared to 2008. High season visitor numbers were similar to 2008 and the final 2 months showed year-on-year increases.

**Figure 5 Staying leisure visitor arrivals by month 2008 and 2009.**



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 - 2009 party composition.**

	Adults (over 16)	Children (under 16)	Total Visitors
UK	240,350	17,830	258,180
Ireland	5,020	550	5,570
Other CI	14,920	1,670	16,590
France	30,870	3,390	34,260
Germany	8,860	410	9,270
Benelux	4,340	420	4,760
Other	11,220	670	11,890
<b>Total</b>	<b>315,580</b>	<b>24,930</b>	<b>340,510</b>

In 2009, children accounted for over 7% of total staying leisure visitors, a slightly smaller percentage than in 2007 and 2008.

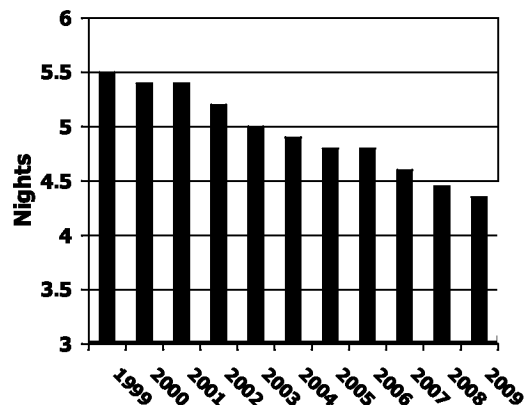
### 2.3 Average Length of Stay

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 2009.

**Figure 6 Staying leisure visitors – average stay 1999-2009**



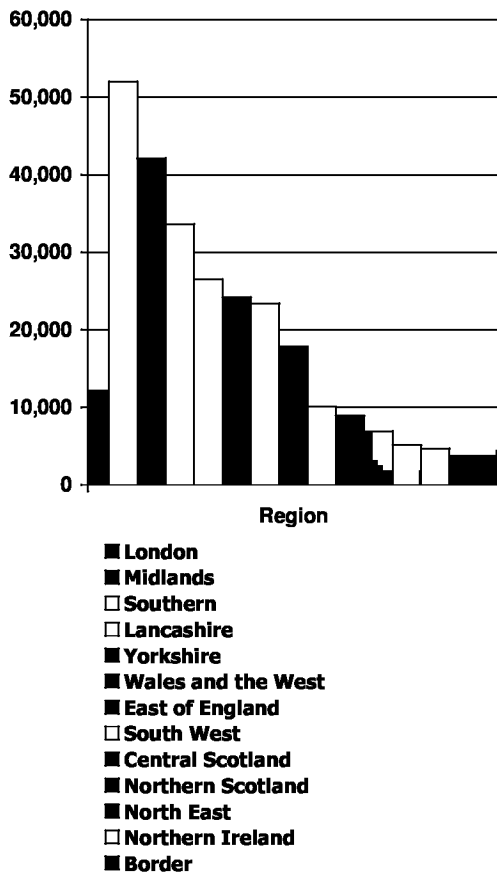
Source: Visitor registration cards

## 2.4 Region of Residence

### 2.4.1 UK

UK postcodes have been data inputted from completed visitor registration cards. From the postcode it has been possible to continuously measure changes in the regionality of UK visitors.

**Figure 7 Volumes of staying leisure visitors from the UK by ISBA region in 2009**



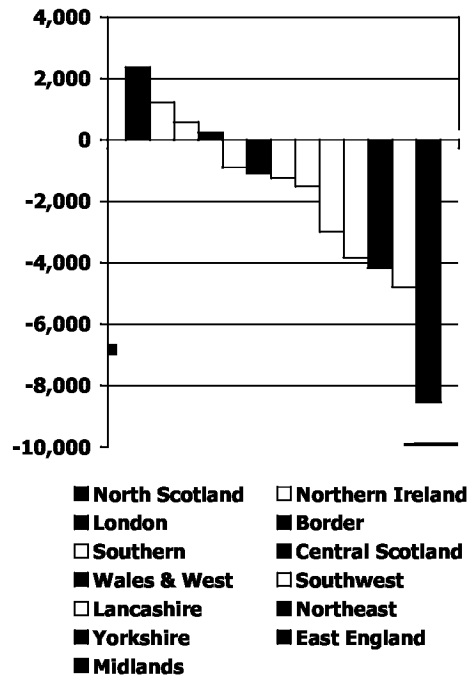
There have been some significant changes in the regional distribution of visitors by ISBA region between 2005 and 2009. These changes are partly reflective of the changes to capacity on certain routes and to some new routes being introduced, as well as being lost.

Table 6 and Figure 8 opposite show the changes in volumes of visitors by ISBA region between 2009 and 2008.

**Table 6 Visitor volume changes 2009 vs. 2008**

North Scotland	2,370
Northern Ireland	1,230
London	580
Border	240
Southern	-890
Central Scotland	-1,080
Wales & West	-1,240
Southwest	-1,510
Lancashire	-2,990
Northeast	-3,830
Yorkshire	-4,170
East England	-4,790
Midlands	-8,540

**Figure 8 Visitor volume changes 2009 vs. 2008**



Compared to the UK's population distribution, Jersey had highest penetration in 2009 in the Southern, Southwest and Wales & West regions, followed by the Midlands, East England and London regions.

In 2009, 49% of Jersey's visitors came from the London, Midlands, and Southern regions.

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



**2.4.2 France**

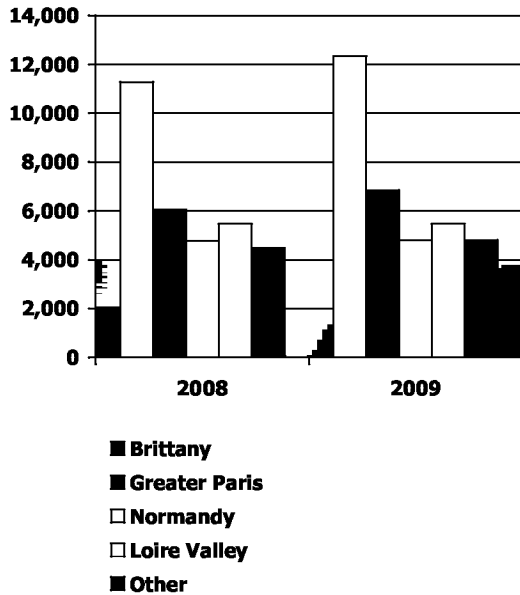
The first two digits of French postcodes from returned visitor registration cards have also been captured so that a continuous monitor of visitors from French Départements has been possible. Départements are grouped into French regions.

Table 7 and Figure 9 show the distribution of French staying leisure visitors between 2008 and 2009.

**Table 7 French visitors by region 2009 vs. 2008**

	2008	2009	Change 09/08	Change 09/08
Brittany	11,280	12,330	9%	1,050
Greater Paris	6,050	6,850	13%	800
Normandy	4,780	4,790	0%	10
Loire Valley	5,480	5,480	0%	0
South East	830	890	7%	60
South West	800	860	7%	60
Other	2,850	3,060	7%	210
<b>Total</b>	<b>32,070</b>	<b>34,260</b>	<b>7%</b>	<b>2,190</b>

**Figure 9 French visitors by region 2008 vs. 2009**



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 2009. 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 2009**

MOSAIC Group	% UK Households	Jersey Visitors	Index 2009
<b>Symbols of Success</b>	9.6%	19.9%	<b>2.1</b>
<b>Happy Families</b>	10.8%	12.2%	<b>1.1</b>
<b>Suburban Comfort</b>	15.1%	21.6%	<b>1.4</b>
<b>Ties of Community</b>	16.0%	11.2%	<b>0.7</b>
<b>Urban Intelligence</b>	7.2%	5.5%	<b>0.8</b>
<b>Welfare Borderline</b>	6.4%	1.7%	<b>0.3</b>
<b>Municipal Dependency</b>	6.7%	1.9%	<b>0.3</b>
<b>Blue Collar Enterprise</b>	11.0%	6.4%	<b>0.6</b>
<b>Twilight Subsistence</b>	3.9%	2.1%	<b>0.5</b>
<b>Grey Perspectives</b>	7.9%	9.4%	<b>1.2</b>
<b>Rural Isolation</b>	5.4%	8.2%	<b>1.5</b>

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 2009, average length of stay fell from 4.45 nights in 2008 to 4.35 nights in 2009. Average stay for UK visitors fell from 4.82 nights in 2008 to 4.75 nights in 2009.
- The percentage of visitors booking their holiday through a tour operator was 52% in 2009; representing a slight fall from 53% in 2008 and 2007. The proportion on a package tour has remained fairly constant over the past 5 years.
- The percentage of first time visitors in 2009 fell from 46% to 45%. This figure has also been consistent over the past 5 years.
- In 2009 there was an increase in the proportion of visitors booking at shorter notice. 35% of visitors booked less than one month before arrival compared to 33% in 2008.
- Between 2005 and 2009 the percentage of staying leisure visitors travelling by air to Jersey has consistently hovered around the 70-73% mark. In 2009 72% of staying leisure visitors travelled to Jersey by air; the same proportion as in 2008.
- There had been a gradual increase in the average age or age profile of staying leisure visitors in previous years. This trend reversed in 2003 with the overall average adult age dropping to 52 years and, since 2003 the average adult age has remained at 53 to 54 years. It is also noteworthy that UK visitors are generally older than most European visitors.

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

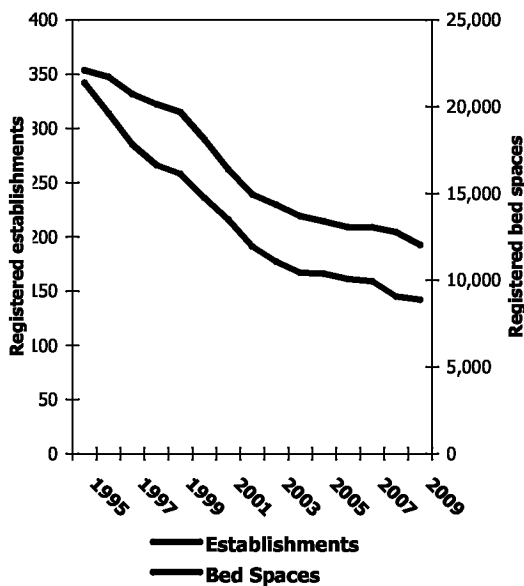
### 3. Registered Bed Stock

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

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

However, in recent years the decline has slowed and 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.

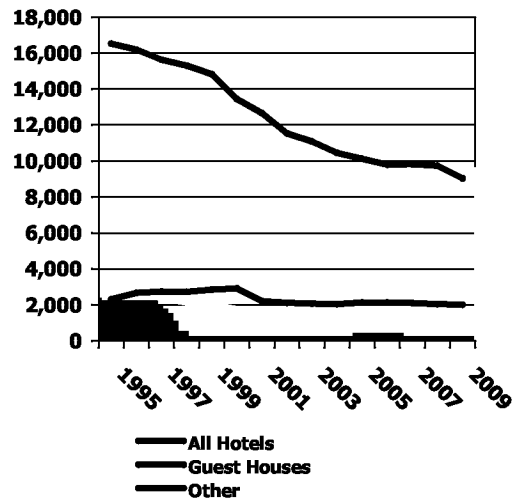
**Figure 10 Registered establishments and bed spaces 1995-2009**



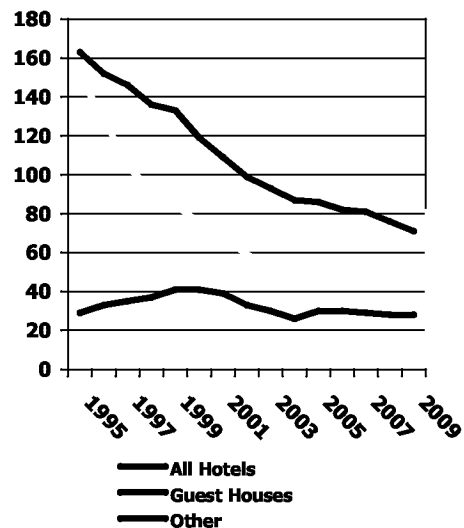
In 2009, Jersey had 142 registered establishments, representing over 12,000 tourist bed spaces. Hotels accounted for 75% of the total bed stock in 2009.

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 also 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 85 in 2009.

**Figure 11 Distribution of bed spaces 1995-2009**



**Figure 12 Distribution of establishments 1995-2009**



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

#### 4. Accommodation Performance Indicators

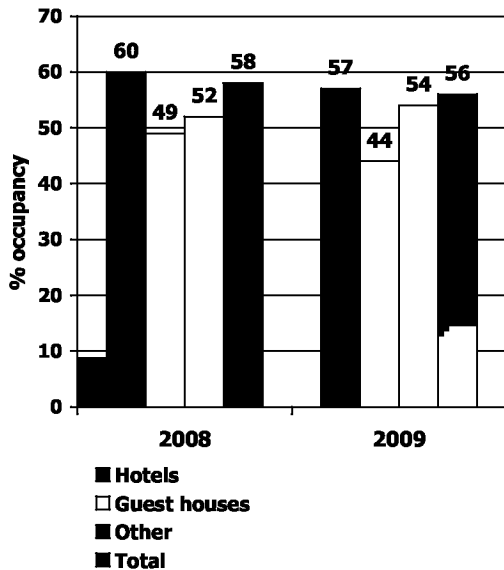
This section shows the performance in terms of bed and room nights sold, and occupancy levels achieved, in the accommodation sector.

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 2009 vs. 2008.

**Figure 13 Bed space occupancy 2009 vs.2008**

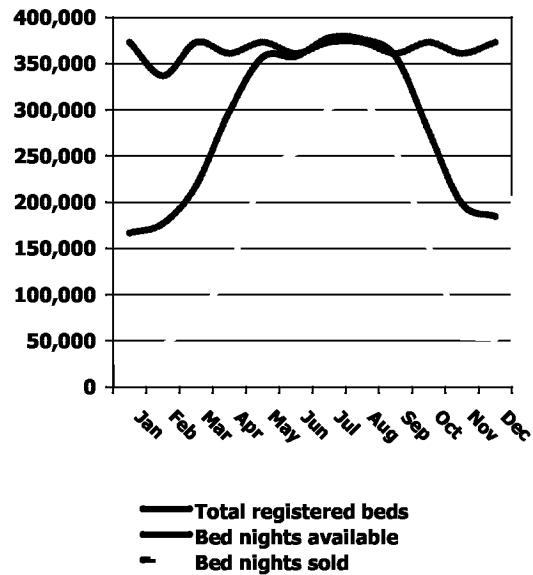


**In 2009, total bed space occupancy averaged 56%, compared to 58% in 2008.** Bed nights sold in all accommodation decreased by 7% to 1,887,500 and total bed night availability fell by 4% to 3,345,500.

#### 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 - 2009**

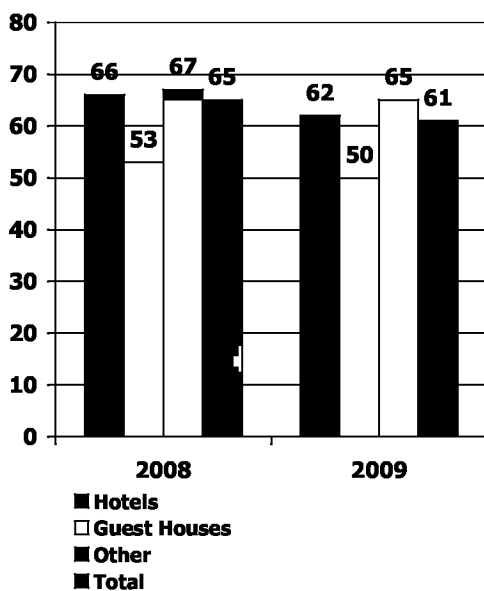


### 4.2 Room Occupancy

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 2009 vs. 2008.

**Figure 15 Room space occupancy 2009 vs. 2008**



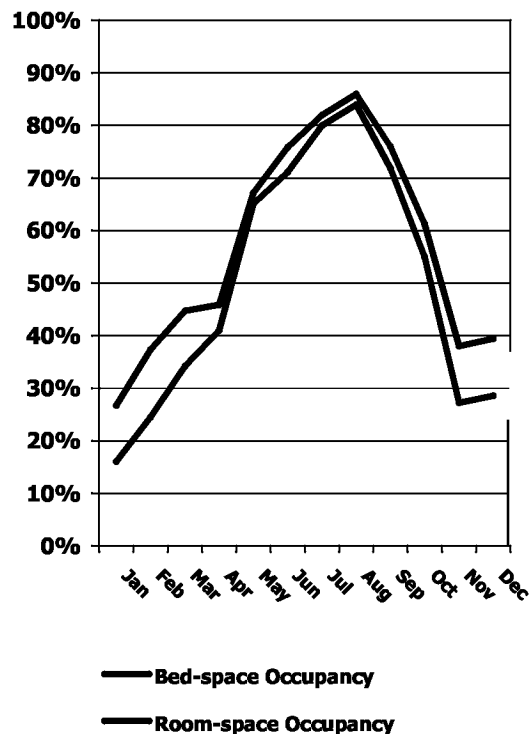
In 2009 total room occupancy averaged 61%; a fall from 65% in 2008. Rooms sold in all accommodation decreased by 9% to 913,700 while total rooms available decreased by 4% to 1,486,400.

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 2009**



### 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. Circ. 90% of Jersey's registered bed stock has computer access to the system.

**Table 9 Jersey Link bookings 2009 vs. 2008**

Number of bookings	2008	2009	09 vs. 08
<b>Hotels</b>	2,374	2,504	5%
<b>Guest Accommodation</b>	1,831	1,711	-7%
<b>Self Catering</b>	144	198	38%
<b>TOTAL</b>	4,349	4,413	1%

Number of visitors	2008	2009	09 vs. 08
<b>Hotels</b>	4,972	5,273	6%
<b>Guest Accommodation</b>	3,779	3,597	-5%
<b>Self Catering</b>	429	550	28%
<b>TOTAL</b>	9,180	4,413	3%

Number of bed nights	2008	2009	09 vs. 08
<b>Hotels</b>	16,220	17,200	6%
<b>Guest Accommodation</b>	12,045	11,243	-7%
<b>Self Catering</b>	2,176	3,070	41%
<b>TOTAL</b>	30,441	31,513	4%

Revenue	2008	2009	09 vs. 08
<b>Hotels</b>	£709,695	£777,952	10%
<b>Guest Accommodation</b>	£375,778	£368,826	-2%
<b>Self Catering</b>	£60,073	£98,404	64%
<b>TOTAL</b>	£1,145,546	£1,245,182	9%

The above tables show a 1% increase in bookings, resulting in a 3% increase in visitors and 4% increase in bed nights sold through the system. Revenue in 2009 increased by 9% to £1,245,182 compared to 2008, producing an average per person per night rate of £39.51, an increase on 2008 of £1.88 (+5%). Average party size remained at 2.1 people, and average stay was slightly up at 3.4 nights in 2009. Average length of stay is less for Jersey Link bookings than the overall staying leisure visitor average of 4.4 nights.

Jersey Link bookings accounted for 1.7% of total bed nights sold in 2009, compared to over 1.5% in 2008.

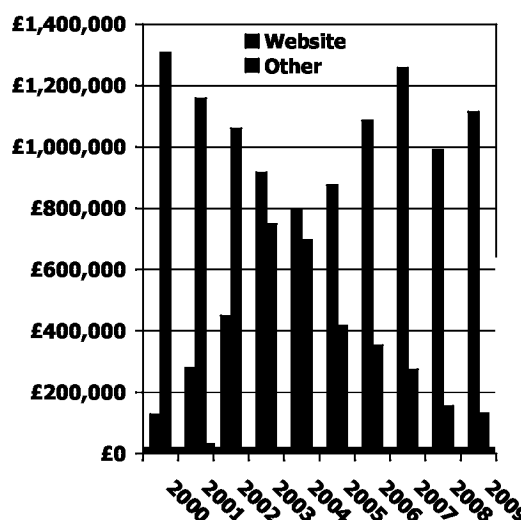
The tables also demonstrates the importance of Jersey Link to the guest house sector, where the number of bookings is disproportionate to the number of beds represented within the sector.

### 5.2 Jersey Link Bookings on the Internet

- 84% of all Jersey Link bookings were made on the Internet in 2009 compared to 80% in 2008, 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.
- 89% of all Jersey Link booking value was made on the Internet in 2009 compared to 86% in 2008, 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 £302 compared to £182 for other bookings made through Jersey Link. This further highlights the importance of the internet.

**Figure 17  
Jersey Link Bookings Revenue 2000 – 2009**



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](http://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. Direct year-on-year comparisons are therefore subject to changes in the way in which the data has been collected.

In 2009, there were nearly a million \* "Total Unique Visitors" (visitors identified by PC IP address and cookies, excluding any repeat visits) to the site, and they spent an average of 5 minutes looking through the site.

### 6.2 Internet usage by Jersey visitors

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

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

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

	No internet access and never used it for holiday information			
	2000	2004	2006	2008
<b>UK</b>	53%	43%	32%	25%
<b>Ireland</b>	41%	26%		
<b>Guernsey</b>	41%	23%		
<b>France</b>	53%	22%	13%	
<b>Germany</b>	48%	28%	18%	
<b>Netherlands</b>	34%	13%		
<b>Belgium</b>	39%	27%		
<b>Switzerland</b>	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.

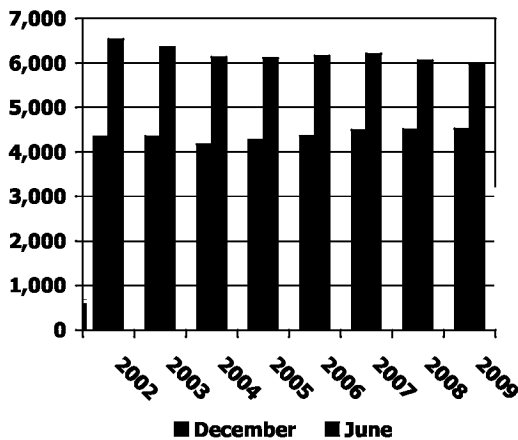
**7. Employment in the Hospitality Sector**

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 2002 and 2009. From 2002 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 and a further decrease in June 2009 of 80.

**Figure 20 Total staff employed in the hospitality sector 2002 - 2009**



Source: Statistics Unit, Policy and Resources Department

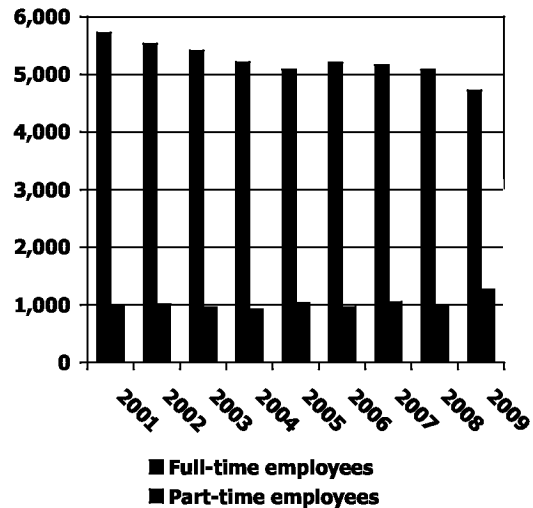
The difference between the number of staff employed in June 2009 and December 2008, some 1,460, would indicate the seasonal nature of tourism employment. The equivalent figure in 2008 was 1,550.

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, and June 2009. In recent years there has been a steadying in the numbers of staff employed since numbers began to fall in the 1990's.

Figure 21 below shows how the decline in hospitality sector employment since 2002 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 5,160 in 2007, 5,080 in 2008 and 4,720 in 2009. In 2009, part-time employment rose to 1,260 from 970 in 2008.

In 2002, full-time employees accounted for 85% of all those employed in hotels, restaurants and bars, compared to 79% in 2009.

**Figure 21 Full-time vs. part-time posts (June) 2002 - 2009**



Source: Statistics Unit, Policy and Resources Department

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



### 8. Passenger Arrivals

In 2009, passenger arrivals through Jersey's airport and harbour terminals decreased by just over 61,400 (-5%) compared to 2008 to a total of 1,099,500.

Figure 22 details a breakdown of arrivals by air and sea against the total for each year. 2009 saw a decrease in arrivals by air of 8.3% (-66,600), and an increase in arrivals by sea of 1.5% (5,300).

**Figure 22 Total passenger arrivals 2001 – 2009**

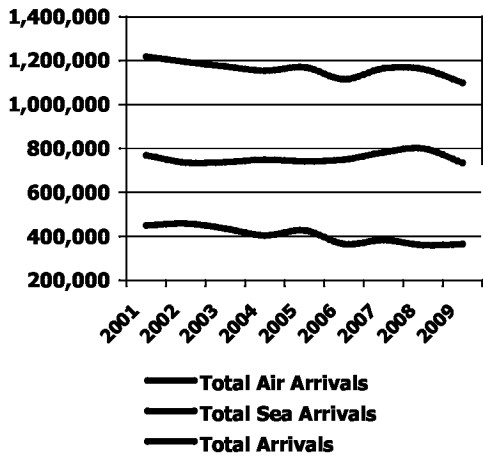
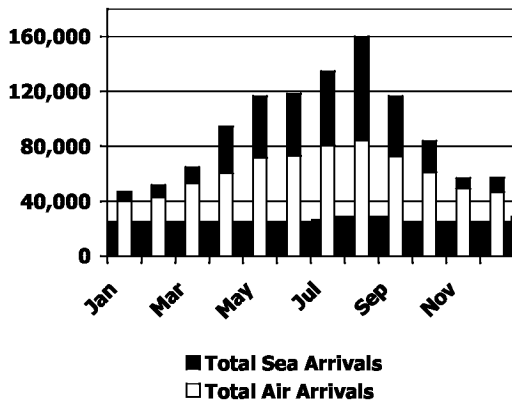


Figure 23 shows arrivals by month during 2009. The pattern of higher arrivals during the summer months reflects the seasonality of the "tourist" season.

**Figure 23 Total air & sea arrivals by month for 2009**



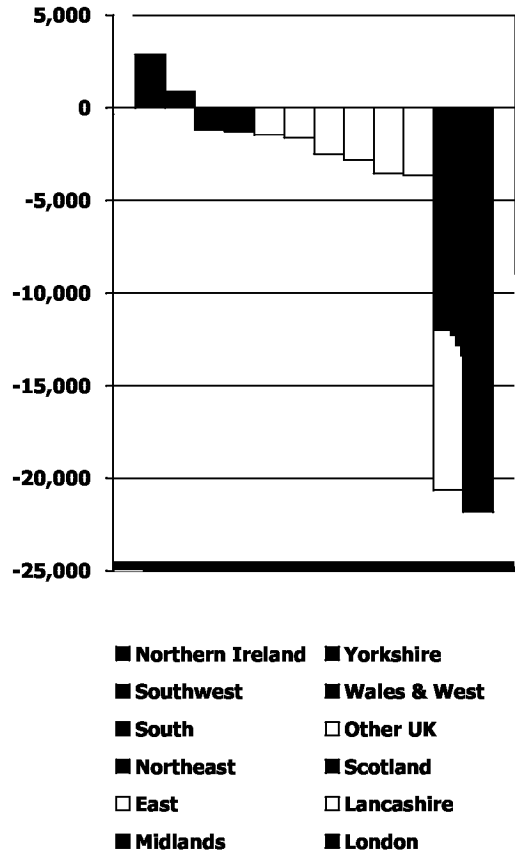
As in recent years, 2009 again saw some significant changes in arrivals patterns.

Only 2 regions showed increases in passenger arrivals, while passenger arrivals from London and the Midlands were both down by over 20,000.

While Gatwick and Stansted saw good increases in passenger numbers, these could not offset the losses on the London Heathrow and Luton routes. The other significant loss was nearly 25,000 passengers on the low-cost Coventry route.

Figure 24 illustrates the impact of operators in 2009 vs. 2008 by region.

**Figure 24 Changes in UK air arrivals by region 2009 vs. 2008**



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

## 9. Guide to Data Sources and Notes

### Figures

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

### Seasons

Where seasons are referred to, the following is applied:  
 Spring = April, May and June  
 Summer = July and August  
 Autumn = September and October  
 Winter = November, December, January, February and March

### Passenger arrivals

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

### Visitor volume, value and profiles

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

### Visitor Registration Scheme

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

### The Jersey Travel Surveys

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

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

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

### Staying Leisure Visitor Surveys 2006 and 2008

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

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

### Employment figures

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

### Registered bed stock

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

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

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

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

### Other Sources used within the 2009 Annual Report.

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

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

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

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

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

Appendix 1

VISITOR VOLUMES 1992 - 2009

	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	Change	Average
																			09/08	05-09
<b>STAYING HOLIDAY/LEISURE VISITORS</b>																				
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	282,810	258,180	-27.7%	-6.7%
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	5,760	5,570	-3.3%	-3.3%
OTHER CI	8,020	8,160	9,120	10,080	13,000	13,360	12,710	13,440	13,190	14,120	15,130	15,380	15,180	16,770	15,260	15,320	16,470	16,590	0.7%	0.7%
FRANCE	44,520	45,070	39,380	41,430	41,770	39,980	32,930	31,520	30,680	27,490	28,210	29,300	29,960	31,370	31,450	33,400	32,070	34,260	6.8%	6.8%
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	8,850	9,270	4.7%	4.7%
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	480	810	430	-46.9%	-46.9%
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	930	570	-36.7%	-36.7%
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	2,960	3,150	6.4%	6.4%
BELGIUM	2,220	3,030	3,860	3,180	3,530	4,180	3,790	4,320	3,060	2,520	2,240	2,280	2,760	2,730	2,100	2,070	1,730	1,610	-6.9%	-6.9%
SWITZERLAND	2,560	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	1,810	2,000	10.5%	10.5%
FINLAND	510	200	2,340	2,370	2,560	2,530	2,590	380	520	280	190	90	130	100	440	180	110	150	36.4%	36.4%
DENMARK	1,870	1,560	1,530	1,350	1,890	1,710	1,410	1,290	1,040	680	600	380	410	440	490	430	420	410	-2.4%	-2.4%
AUSTRIA	170	550	840	790	870	1,370	1,550	1,780	1,010	890	700	560	550	380	530	950	580	630	8.6%	8.6%
SPAIN	280	340	300	300	340	450	320	260	320	320	420	340	290	380	370	390	360	420	16.7%	16.7%
PORTUGAL	130	220	320	340	310	270	290	270	380	280	350	300	170	260	90	230	250	340	36.0%	36.0%
ITALY	360	480	420	500	310	420	390	380	330	240	380	290	240	230	210	330	240	380	58.3%	58.3%
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	710	480	-32.4%	-32.4%
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	880	1,110	26.1%	26.1%
AUSTRALIA <sup>1</sup>								810	1,280	1,100	930	720	970	890	880	1,020	1,030	910	-11.7%	-11.7%
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	3,500	4,050	2.9%	2.9%
<b>TOTAL STAYING LEISURE<sup>2</sup></b>	<b>583,570</b>	<b>595,440</b>	<b>568,000</b>	<b>563,260</b>	<b>580,750</b>	<b>590,490</b>	<b>535,790</b>	<b>509,170</b>	<b>477,530</b>	<b>441,360</b>	<b>398,710</b>	<b>378,850</b>	<b>384,540</b>	<b>380,930</b>	<b>368,160</b>	<b>375,860</b>	<b>362,280</b>	<b>340,510</b>	<b>-6.0%</b>	<b>-6.0%</b>
<b>VISITING FRIENDS/RELATIVES<sup>3</sup></b>						62,440	68,320	74,860	78,540	81,780	86,470	89,380	95,220	100,550	90,110	81,710	95,470	101,010	5.8%	5.8%
<b>LANGUAGE STUDENTS<sup>4</sup></b>						4,370	4,260	3,020	2,680	2,560	2,230	2,300	2,070	1,930	2,500	2,230	2,850	2,480	-13.0%	-13.0%
<b>BUSINESS VISITORS<sup>5</sup></b>						89,430	96,940	105,720	107,940	100,500	104,550	93,140	83,190	76,390	87,290	104,010	105,430	88,910	-15.7%	-15.7%
<b>CONFERENCE DELEGATES<sup>6</sup></b>	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	4,030	9,690	9,190	9,240	0.5%	0.5%
<b>VISITING YACHTSMEN<sup>7</sup></b>			27,620	29,740	27,430	27,670	26,650	27,480	25,190	25,850	23,600	25,830	24,230	24,350	24,030	21,070	19,920	21,420	7.5%	7.5%
<b>LEISURE DAYTRIPPERS<sup>8</sup></b>						180,000	165,290	153,690	135,330	141,110	135,500	117,370	110,980	115,690	100,880	94,050	96,730	98,360	1.7%	1.7%
<b>OTHER<sup>9</sup></b>						35,360	36,330	35,330	34,870	36,870	37,510	37,480	41,360	49,510	46,790	50,660	34,520	20,740	-39.9%	-39.9%
<b>TOTAL VISITORS</b>	<b>884,910</b>	<b>949,910</b>	<b>922,490</b>	<b>878,110</b>	<b>843,050</b>	<b>802,460</b>	<b>748,600</b>	<b>747,070</b>	<b>752,270</b>	<b>728,540</b>	<b>739,280</b>	<b>726,390</b>	<b>726,670</b>	<b>725,830</b>	<b>725,830</b>	<b>725,830</b>	<b>725,830</b>	<b>725,830</b>	<b>-6.0%</b>	<b>-6.0%</b>

<sup>1</sup> Prior to 1999, Australia was classified within "Other".  
<sup>2</sup> Staying leisure visitors are based upon returns of visitor registration cards and the 1997, 2003/4, 2005, 2007 and 2009 Travel Surveys and refer to those staying in paid accommodation.  
<sup>3</sup> 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, 2007 and 2009 Travel Surveys.  
<sup>4</sup> Language student numbers are based upon declarations from language schools.  
<sup>5</sup> Business visitor estimates are based upon returns of visitor registration cards and the 1997, 2003/4, 2005, 2007 and 2009 Travel Surveys.  
<sup>6</sup> Conference figures are supplied by the Jersey Conference Bureau.  
<sup>7</sup> Visiting yacht figures are supplied by the Jersey Harbours.  
<sup>8</sup> Leisure day trips are estimated from the results of the 1997, 2003/4, 2005, 2007 and 2009 Travel Surveys.  
<sup>9</sup> 'Other' may refer to business or leisure visits (e.g. specific events, deliveries, visiting bands, weddings, funerals, educational trips etc.). The 2009 Travel Survey had a tighter definition of "Other" than previous surveys, with many respondents being reclassified as leisure or business visitors.

## Appendix 2

**BREAKDOWN OF ON-ISLAND VISITOR EXPENDITURE ESTIMATES BY SOURCE MARKET FOR 2008 AND 2009.**

	2008		2009		2009 vs. 2008	
	Spend per Visitor	Value of Market £000's	Spend per Visitor	Value of Market £000's	% Change Spend per Visitor	% Change Value of Market
<b>Staying Holiday/Leisure Visitors</b>						
UK	£464	£131,354	£472	£121,769	2%	-7%
Ireland	£520	£2,993	£551	£3,069	6%	3%
Other C.I.	£268	£4,410	£282	£4,685	5%	6%
France	£230	£7,370	£232	£7,963	1%	8%
Germany	£499	£4,415	£516	£4,783	3%	8%
Benelux	£420	£1,968	£456	£2,170	9%	10%
Other	£493	£5,737	£476	£5,651	-3%	-1%
<b>Staying Leisure Total <sup>1</sup></b>	<b>£437</b>	<b>£158,247</b>	<b>£441</b>	<b>£150,092</b>	<b>1%</b>	<b>-5%</b>
<b>Visiting friends/relatives <sup>1</sup></b>	<b>£267</b>	<b>£25,475</b>	<b>£273</b>	<b>£27,588</b>	<b>2%</b>	<b>8%</b>
<b>Language students <sup>2</sup></b>	<b>£720</b>	<b>£2,053</b>	<b>£665</b>	<b>£1,648</b>	<b>-8%</b>	<b>-20%</b>
Daytrippers - French	£49	£2,367	£50	£2,625	2%	11%
Daytrippers - UK	£41	£758	£42	£490	1%	-35%
Daytrippers - Other C.I.	£98	£984	£98	£1,579	0%	60%
Daytrippers - Other	£38	£767	£39	£680	3%	-11%
<b>Daytrippers - Total <sup>1</sup></b>	<b>£50</b>	<b>£4,877</b>	<b>£55</b>	<b>£5,373</b>	<b>9%</b>	<b>10%</b>
<b>Visiting yachtsmen <sup>3</sup></b>	<b>£98</b>	<b>£1,958</b>	<b>£93</b>	<b>£1,999</b>	<b>-5%</b>	<b>2%</b>
Business - Day visitors	£62	£2,212	£62	£1,948	0%	-12%
Business - Staying visitors	£360	£25,111	£370	£21,327	3%	-15%
<b>Business visitors - Total <sup>1</sup></b>	<b>£259</b>	<b>£27,324</b>	<b>£262</b>	<b>£23,275</b>	<b>1%</b>	<b>-15%</b>
Conference - Association	£627	£2,350	£558	£3,098	-11%	32%
Conference - Corporate	£577	£3,139	£677	£2,498	17%	-20%
<b>Conference delegates - Total <sup>4</sup></b>	<b>£597</b>	<b>£5,489</b>	<b>£606</b>	<b>£5,596</b>	<b>1%</b>	<b>2%</b>
Other - Day visitors	£77	£827	£77	£383	0%	-54%
Other - Staying visitors	£523	£12,446	£662	£10,450	27%	-16%
<b>Other visitors - Total <sup>1</sup></b>	<b>£384</b>	<b>£13,272</b>	<b>£522</b>	<b>£10,833</b>	<b>36%</b>	<b>-18%</b>
<b>Total Visitors</b>	<b>£328</b>	<b>£238,695</b>	<b>£332</b>	<b>£226,404</b>	<b>1%</b>	<b>-5%</b>

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

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

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

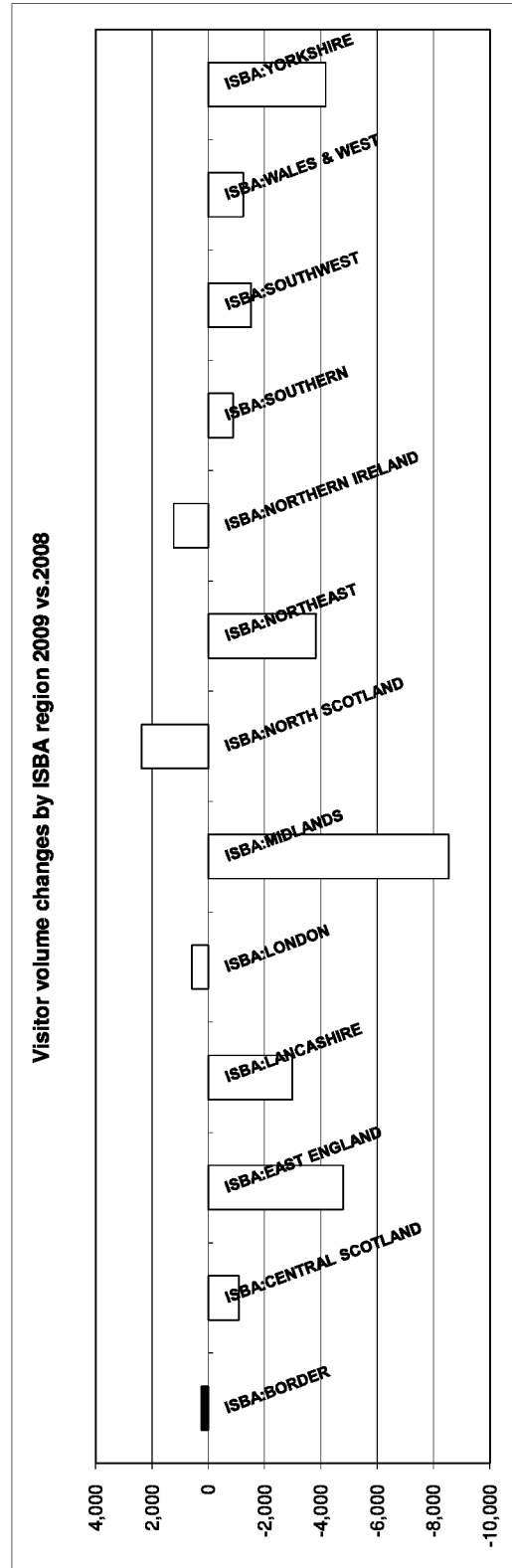
<sup>4</sup> Expenditure is calculated by using results from the 2007 Jersey Travel Survey and research into conference delegate rates and applying RPI increases/decreases.

N.B. 2008 figures are at 2008 prices.

**Appendix 3 UK Staying Leisure Visitors by ISBA Region 2005 - 2009**

REGION	UK Households	2005	Market Share	2006	Market Share	2007	Market Share	2008	Market Share	2009	Market Share	% Change 09/08	Vol. Change 09/08	2009 Index
ISBA: BORDER	1.2%	2,500	1%	2,400	1%	2,330	1%	2,390	1%	2,630	1%	10.0%	240	0.83
ISBA: CENTRAL SCOTLAND	6.3%	10,770	4%	10,353	4%	10,980	4%	10,020	4%	8,940	3%	-10.8%	-1,080	0.48
ISBA: EAST ENGLAND	6.7%	22,330	7%	21,459	7%	22,920	8%	22,650	8%	17,860	7%	-21.1%	-4,790	1.04
ISBA: LANCASHIRE	11.6%	28,800	10%	27,676	10%	25,080	9%	29,520	10%	26,530	10%	-10.1%	-2,990	0.86
ISBA: LONDON	19.4%	50,040	17%	48,094	17%	53,200	18%	51,420	18%	52,000	20%	1.1%	560	1.03
ISBA: MIDLANDS	15.4%	56,570	19%	54,370	19%	55,850	19%	50,680	18%	42,140	16%	-16.9%	-8,540	1.04
ISBA: NORTH SCOTLAND	2.1%	3,910	1%	3,760	1%	3,920	1%	4,580	2%	6,950	2%	51.7%	2,370	0.95
ISBA: NORTHEAST	5.1%	12,430	4%	11,944	4%	7,820	3%	8,960	3%	5,130	3%	-42.7%	-3,830	0.59
ISBA: NORTHERN IRELAND	2.4%	4,690	2%	4,512	2%	4,340	1%	3,450	1%	4,680	2%	35.6%	1,230	0.83
ISBA: SOUTHERN	9.2%	37,340	12%	35,880	12%	35,820	12%	34,500	12%	33,820	13%	-2.6%	-880	1.41
ISBA: SOUTHWEST	3.0%	13,060	4%	12,551	4%	12,300	4%	11,820	4%	10,110	4%	-13.0%	-1,510	1.33
ISBA: WALES & WEST	7.7%	25,760	9%	24,756	9%	28,970	10%	24,630	9%	23,390	9%	-5.0%	-1,240	1.17
ISBA: YORKSHIRE	9.9%	32,710	11%	31,436	11%	31,510	11%	28,370	10%	24,200	9%	-14.7%	-4,170	0.91
<b>TOTAL</b>		<b>300,900</b>		<b>289,200</b>		<b>295,040</b>		<b>282,810</b>		<b>258,180</b>		<b>-8.7%</b>	<b>-24,610</b>	

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 2005-2009

	2005	% market share	2006	% market share	2007	% market share	2008	% market share	2009	% market share	Change 09/08	Average 2005-2009
BRITTANY	10,660	34%	9,910	32%	10,710	32%	11,280	35%	12,330	36%	9%	10,978
GREATER PARIS	6,590	21%	6,260	20%	6,350	19%	6,050	19%	6,850	20%	13%	6,420
NORMANDY	4,390	14%	5,220	17%	5,560	17%	4,780	15%	4,790	14%	0%	4,948
LOIRE VALLEY	5,650	18%	5,630	18%	5,810	17%	5,480	17%	5,480	16%	0%	5,610
SOUTH EAST	940	3%	880	3%	940	3%	830	3%	890	3%	7%	896
SOUTH WEST	940	3%	820	3%	910	3%	800	3%	860	3%	8%	866
MEDITERRANEAN	630	2%	570	2%	650	2%	640	2%	690	2%	8%	636
POITOU-CHARENTES	630	2%	570	2%	660	2%	550	2%	580	2%	5%	598
NORTH EAST	630	2%	440	1%	470	1%	450	1%	480	1%	7%	494
NORTH	630	2%	440	1%	490	1%	380	1%	410	1%	8%	470
PICARDY	310	1%	380	1%	380	1%	480	2%	520	2%	8%	414
BURGUNDY	160	1%	190	1%	240	1%	190	1%	210	1%	11%	198
CHAMPAGNE	160	1%	160	1%	230	1%	160	1%	170	1%	6%	176
<b>TOTAL</b>	<b>31,370</b>		<b>31,450</b>		<b>33,400</b>		<b>32,070</b>		<b>34,260</b>		<b>7%</b>	<b>32,510</b>

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

**MOSAIC profile of UK Staying Leisure Visitors 2006 - 2009**

Type	Group	% Households	Type Description	% Households	2006	2007	2008	2009	Index 2009
1	Symbols of Success	9.6%	Globetrotters	0.7%	0.5%	0.7%	0.6%	0.6%	1.13
2			Cultural Connections	0.9%	1.1%	1.3%	1.4%	1.4%	1.56
3			Cultural Leadership	1.1%	2.5%	2.7%	2.7%	3.0%	2.78
4			Corporate Chatterboxes	1.5%	2.6%	3.0%	2.8%	3.0%	2.27
5			Golden Energy Nesters	1.7%	3.1%	3.2%	3.3%	3.3%	2.01
6			Provincial Privilege	1.8%	3.9%	3.8%	4.2%	4.2%	2.28
7			High Technologists	2.0%	3.6%	3.6%	4.1%	4.1%	2.01
8	Happy Families	10.6%	Semi-rural Seclusion	2.0%	3.6%	3.6%	4.1%	4.1%	2.01
9			Just Moving In	0.1%	0.4%	0.4%	0.5%	0.5%	0.56
10			Fledgling Nursees	1.2%	1.5%	1.5%	1.5%	1.5%	1.27
11			Upscale New Owners	1.4%	2.4%	2.4%	2.5%	2.5%	1.84
12			Family Making Good	2.3%	2.9%	2.9%	2.8%	2.8%	1.19
13			Middle Ring Families	3.6%	3.5%	3.5%	3.4%	3.4%	1.19
14			Burdened Optimists	1.4%	1.4%	1.5%	1.4%	1.4%	0.71
15	Suburban Comfort	15.1%	In Military Quarters	0.2%	0.1%	0.1%	0.1%	0.1%	0.68
16			Close to Retirement	5.3%	5.3%	5.2%	5.3%	5.3%	1.89
17			Conservative Values	2.6%	4.6%	4.6%	4.3%	4.3%	1.51
18			Small Time Business	4.5%	4.4%	4.4%	4.3%	4.4%	1.45
19			Sprawling Subplots	3.1%	4.0%	4.0%	3.8%	3.8%	1.25
20			Original Suburbs	2.4%	3.3%	3.3%	3.3%	3.3%	1.45
21	Ties of Community	16.0%	Asian Enterprise	1.0%	0.4%	0.5%	0.4%	0.4%	0.39
22			Respectable Rows	2.7%	2.3%	2.3%	2.3%	2.3%	0.64
23			Affluent Blue Collar	3.1%	4.0%	4.0%	3.6%	3.6%	1.17
24			Industrial grit	3.2%	3.1%	3.0%	2.7%	2.7%	0.72
25			Coronation Street	2.6%	1.1%	1.1%	1.0%	1.0%	0.37
26			Town Centre Refuge	1.1%	0.7%	0.7%	0.6%	0.6%	0.56
27			South Asian industry	0.9%	0.1%	0.1%	0.1%	0.1%	0.11
28	Urban Intelligence	7.2%	Settled Minorities	1.6%	0.6%	0.6%	0.7%	0.7%	0.43
29			Counter Cultural Milk	1.4%	0.5%	0.7%	0.7%	0.7%	0.55
30			City Adventurers	1.5%	1.0%	1.1%	1.2%	1.2%	0.97
31			New Urban Colonists	1.4%	1.3%	1.4%	1.5%	1.5%	1.10
32			Caring Professionals	1.1%	0.8%	0.8%	0.8%	0.8%	0.66
33			Dinky Developments	1.1%	0.7%	0.7%	0.7%	0.7%	0.61
34			Town Gown Transition	0.6%	0.4%	0.4%	0.4%	0.4%	0.49
35	Wellfare Borderlines	6.4%	University Challenge	0.3%	0.1%	0.1%	0.1%	0.1%	0.58
36			Beddit Beneficiaries	0.7%	0.2%	0.2%	0.3%	0.3%	0.26
37			Metro Multiculture	1.7%	0.3%	0.3%	0.4%	0.4%	0.26
38			Upper Floor Families	0.4%	0.4%	0.5%	0.4%	0.4%	0.25
39			Tower Block Living	0.5%	0.1%	0.1%	0.1%	0.1%	0.14
40			Digitalised Dependency	1.3%	0.4%	0.4%	0.4%	0.4%	0.27
41	Municipal Dependency	6.7%	Sharing a Staircase	0.5%	0.1%	0.1%	0.1%	0.1%	0.19
42			Families on Benefits	1.2%	0.3%	0.3%	0.3%	0.3%	0.23
43			Low Horizons	26.4%	0.6%	0.6%	0.7%	0.7%	0.02
44	Blue Collar Enterprise	11.0%	Ex-Industrial Legacy	2.9%	1.0%	1.0%	0.9%	0.9%	0.31
45			Rustbelt Resilience	3.0%	1.5%	1.5%	1.4%	1.4%	0.48
46			Older Right to Buy	2.7%	1.8%	1.8%	1.7%	1.7%	0.63
47			White Van Culture	3.2%	2.5%	2.6%	2.3%	2.3%	0.73
48	Twilight Substinence	3.9%	New Town Materialism	2.2%	1.1%	1.0%	1.0%	1.0%	0.45
49			Old People in Flats	0.6%	0.3%	0.3%	0.3%	0.3%	0.34
50			Low Income Elderly	1.2%	1.1%	1.1%	1.1%	1.1%	0.66
51	Grey Perspectives	7.9%	Cared for Pensioners	1.4%	0.6%	0.6%	0.5%	0.5%	0.32
52			Saga Memories	0.8%	0.6%	0.6%	0.6%	0.6%	0.75
53			Childfree Seventy	1.3%	1.3%	1.4%	1.4%	1.4%	1.07
54			High Spending Elders	2.6%	2.7%	2.6%	2.7%	2.7%	1.79
55			Bungalow Retirement	1.3%	1.7%	1.6%	1.6%	1.6%	1.28
56			Small Town Seniors	2.7%	2.6%	2.6%	2.6%	2.6%	1.02
57	Rural Isolation	5.4%	Tourist Attendants	0.5%	0.3%	0.3%	0.3%	0.3%	1.10
58			Summer Playgrounds	0.3%	0.3%	0.3%	0.3%	0.3%	0.93
59			Greenbelt Guardians	1.7%	3.3%	3.3%	3.7%	3.7%	2.15
60			Pastoral Villagers	1.9%	1.6%	1.6%	1.6%	1.6%	1.20
61			Pastoral Symphony	1.3%	1.7%	1.6%	1.6%	1.6%	1.40
62			Upland Hill Farmers	0.4%	0.4%	0.4%	0.4%	0.4%	1.00

MOSAIC is a geodemographic profiling system based upon UK postcodes. This table shows the geo-demographic profiles of visitors to Jersey between 2006 and 2009. The higher the index figure (this is the proportion of Jersey visitors compared to the UK population for each Mosaic Group), the more likely Jersey is to attract visitors from a particular Mosaic group.



Appendix 6

Length of Stay and Average Stay - Profile of Staying Leisure Visitors 2005 - 2009

COUNTRY	Stay																		Average Stay										
	1 - 3 Nights						4 - 6 Nights						7 Nights						8+ Nights					Nights					
	2005	2006	2007	2008	2009		2005	2006	2007	2008	2009		2005	2006	2007	2008	2009		2005	2006	2007	2008	2009	2005	2006	2007	2008	2009	
UK	33%	34%	36%	38%	39%		24%	26%	26%	25%	25%		35%	32%	30%	29%	28%		8%	8%	8%	7%	8%		5.2	5.2	4.9	4.8	4.8
IRELAND	31%	29%	30%	35%	34%		28%	28%	26%	31%	27%		33%	35%	37%	29%	31%		8%	7%	7%	6%	8%		5.2	5.1	5.2	4.8	5.0
OTHER CI	93%	94%	92%	93%	91%		5%	5%	7%	6%	7%		1%	1%	2%	1%	2%		1%	0%	0%	1%	0%		1.8	2.0	1.9	1.9	2.0
FRANCE	90%	89%	89%	88%	89%		7%	8%	8%	8%	8%		2%	2%	2%	2%	2%		1%	1%	1%	2%	1%		2.0	2.1	2.1	2.1	2.1
GERMANY	25%	21%	21%	24%	25%		23%	25%	27%	28%	26%		34%	36%	35%	32%	33%		18%	18%	17%	15%	15%		6.1	6.3	6.1	5.9	5.9
NORWAY	39%	31%	34%	45%	32%		21%	43%	44%	34%	35%		22%	12%	10%	7%	20%		18%	13%	12%	14%	13%		5.1	5.0	4.7	4.6	5.1
SWEDEN	27%	25%	25%	25%	25%		59%	66%	62%	64%	58%		9%	7%	9%	8%	8%		4%	3%	4%	4%	8%		4.1	4.1	4.1	4.0	4.3
HOLLAND	29%	31%	34%	36%	37%		25%	28%	28%	29%	23%		35%	30%	29%	26%	26%		12%	11%	10%	9%	15%		5.5	5.1	5.1	4.9	5.1
BELGIUM	48%	44%	57%	53%	52%		31%	36%	27%	31%	32%		16%	12%	10%	11%	10%		5%	8%	6%	5%	6%		4.0	4.0	3.7	3.7	3.7
SWITZERLAND	41%	36%	41%	44%	44%		30%	29%	23%	27%	32%		22%	25%	26%	18%	13%		7%	10%	9%	11%	11%		4.7	5.1	4.8	4.7	4.4
FINLAND	40%	80%	47%	38%	40%		39%	15%	27%	44%	44%		8%	2%	9%	8%	7%		12%	3%	16%	9%	9%		4.6	3.4	4.5	4.4	4.1
DENMARK	36%	22%	45%	55%	57%		39%	29%	16%	35%	16%		16%	40%	31%	6%	19%		8%	9%	8%	4%	7%		4.6	5.5	4.7	3.8	4.0
AUSTRIA	33%	53%	45%	50%	54%		26%	24%	32%	20%	21%		18%	12%	17%	20%	16%		23%	11%	7%	10%	9%		5.9	4.7	4.5	4.6	4.2
SPAIN	52%	49%	60%	45%	48%		29%	33%	25%	36%	24%		8%	9%	5%	10%	6%		11%	9%	10%	9%	21%		4.1	4.2	4.0	4.3	5.2
PORTUGAL	55%	47%	57%	47%	45%		17%	18%	13%	25%	30%		18%	22%	16%	14%	7%		10%	13%	14%	15%	18%		4.9	4.5	4.4	4.7	4.9
ITALY	60%	55%	48%	46%	39%		19%	28%	32%	40%	54%		13%	7%	9%	6%	3%		7%	10%	11%	8%	4%		3.7	4.1	4.2	4.3	4.2
CANADA	36%	41%	46%	45%	47%		37%	36%	27%	30%	29%		11%	13%	10%	10%	7%		17%	10%	17%	14%	17%		5.2	5.0	5.1	4.8	5.0
USA	63%	59%	60%	53%	68%		24%	26%	28%	35%	23%		8%	8%	7%	6%	4%		6%	7%	5%	7%	5%		3.5	3.9	3.5	3.9	3.3
AUSTRALIA	56%	56%	61%	56%	59%		30%	29%	26%	26%	26%		9%	9%	8%	7%	7%		5%	5%	5%	11%	9%		3.7	4.2	3.6	4.1	3.8
OTHER	57%	51%	56%	58%	65%		25%	26%	24%	23%	21%		11%	12%	10%	7%	7%		7%	1%	10%	12%	7%		5.9	4.6	4.1	4.1	3.5
TOTAL	40%	43%	45%	45%	47%		22%	23%	23%	23%	23%		30%	27%	26%	25%	23%		8%	7%	7%	7%	7%		4.8	4.8	4.6	4.4	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 2005 - 2009

COUNTRY	% Tour Operator										% First Time Visitors										When booked										Travel																			
	2005					2006					2007					2008					2009					2005					2006					2007					2008					2009				
	2005	2006	2007	2008	2009	2005	2006	2007	2008	2009	2005	2006	2007	2008	2009	2005	2006	2007	2008	2009	2005	2006	2007	2008	2009	2005	2006	2007	2008	2009	2005	2006	2007	2008	2009	2005	2006	2007	2008	2009										
UK	49%	49%	51%	53%	52%	41%	41%	40%	43%	44%	28%	26%	31%	28%	29%	37%	36%	34%	37%	38%	36%	36%	34%	36%	32%	36%	36%	36%	34%	32%	76%	82%	82%	82%	81%															
IRELAND	31%	34%	40%	43%	41%	47%	44%	40%	46%	51%	39%	34%	35%	33%	33%	40%	44%	30%	39%	38%	20%	22%	35%	28%	29%	96%	97%	96%	97%	94%																				
OTHER CI	49%	53%	56%	50%	49%	6%	7%	8%	8%	10%	66%	56%	67%	62%	59%	27%	36%	23%	30%	32%	7%	8%	9%	9%	9%	42%	50%	50%	50%	51%																				
FRANCE	62%	66%	64%	61%	62%	65%	66%	66%	66%	60%	68%	61%	62%	61%	62%	26%	31%	28%	31%	31%	5%	8%	9%	8%	7%	4%	6%	5%	5%	10%																				
GERMANY	59%	59%	63%	62%	62%	85%	85%	84%	83%	78%	25%	27%	27%	23%	25%	36%	34%	33%	34%	36%	39%	39%	40%	42%	39%	56%	56%	52%	53%	56%																				
NORWAY	56%	36%	63%	38%	33%	65%	61%	66%	63%	63%	46%	33%	28%	26%	28%	42%	36%	40%	25%	37%	12%	30%	32%	49%	35%	80%	78%	49%	72%	75%																				
SWEDEN	39%	64%	67%	66%	66%	69%	75%	76%	70%	66%	52%	62%	61%	52%	31%	38%	22%	18%	21%	41%	10%	16%	20%	27%	28%	68%	48%	53%	34%	49%																				
HOLLAND	56%	57%	55%	56%	56%	82%	79%	83%	80%	74%	40%	35%	29%	32%	34%	38%	38%	40%	38%	35%	22%	27%	32%	30%	30%	51%	55%	51%	48%	51%																				
BELGIUM	53%	58%	50%	49%	50%	85%	82%	78%	78%	72%	45%	42%	49%	43%	42%	41%	41%	29%	36%	34%	14%	18%	21%	21%	24%	54%	32%	24%	28%	34%																				
SWITZERLAND	55%	48%	56%	55%	55%	75%	75%	72%	70%	63%	44%	45%	45%	41%	35%	44%	38%	34%	39%	43%	12%	17%	21%	21%	28%	64%	69%	73%	75%	79%																				
FINLAND	34%	81%	39%	58%	56%	72%	87%	75%	71%	76%	21%	51%	38%	58%	39%	57%	45%	48%	28%	41%	21%	4%	14%	14%	20%	86%	93%	81%	73%	70%																				
DENMARK	35%	38%	48%	42%	40%	72%	64%	68%	83%	62%	42%	44%	53%	42%	45%	36%	28%	25%	37%	32%	22%	28%	23%	21%	22%	67%	68%	75%	40%	57%																				
AUSTRIA	58%	55%	60%	56%	55%	85%	84%	81%	83%	73%	31%	41%	26%	23%	32%	36%	36%	46%	36%	38%	33%	21%	28%	41%	30%	74%	62%	64%	57%	68%																				
SPAIN	26%	29%	43%	35%	36%	53%	55%	47%	40%	51%	59%	55%	60%	49%	61%	21%	25%	25%	37%	21%	21%	20%	15%	14%	18%	77%	64%	73%	76%	77%																				
PORTUGAL	14%	14%	25%	30%	28%	59%	36%	46%	59%	45%	74%	63%	66%	76%	50%	15%	36%	19%	21%	42%	11%	0%	15%	3%	9%	83%	82%	88%	75%	90%																				
ITALY	24%	23%	43%	34%	33%	72%	69%	68%	76%	79%	58%	61%	46%	62%	61%	25%	31%	44%	27%	28%	16%	7%	9%	11%	11%	58%	61%	61%	57%	72%																				
CANADA	41%	48%	55%	48%	48%	63%	70%	69%	70%	59%	31%	39%	41%	37%	35%	38%	37%	29%	35%	42%	32%	24%	30%	29%	22%	69%	81%	77%	70%	83%																				
USA	33%	36%	42%	42%	41%	63%	30%	63%	73%	53%	37%	31%	46%	43%	45%	39%	40%	34%	35%	40%	24%	24%	21%	22%	15%	77%	78%	82%	82%	82%																				
AUSTRALIA	41%	43%	39%	45%	41%	65%	64%	55%	65%	57%	47%	38%	54%	42%	44%	31%	36%	23%	30%	34%	22%	27%	23%	28%	23%	70%	80%	66%	71%	71%																				
OTHER	32%	37%	36%	49%	47%	67%	62%	63%	64%	62%	60%	58%	62%	49%	46%	27%	31%	23%	34%	39%	13%	11%	15%	17%	15%	76%	75%	75%	77%	88%																				
TOTAL	50%	51%	53%	53%	52%	49%	45%	44%	46%	45%	36%	31%	36%	33%	35%	33%	37%	33%	36%	37%	32%	32%	31%	32%	28%	70%	73%	73%	72%	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 2005 - 2009

COUNTRY	Age Groups (Years)																		Average Adult Age Years					
	16 - 24			25 - 29			30 - 34			35 - 44			45 - 54			55 - 64			65 - 74			75+		
	2005	2007	2008	2005	2007	2008	2005	2007	2008	2005	2007	2008	2005	2007	2008	2005	2007	2008	2005	2007	2008	2005	2007	2008
UK	3%	2%	3%	3%	3%	3%	5%	4%	3%	10%	9%	9%	18%	18%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
IRELAND	7%	4%	6%	8%	6%	8%	9%	9%	8%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%
OTHER CI	17%	16%	17%	16%	12%	12%	12%	11%	12%	12%	11%	11%	12%	12%	12%	12%	12%	12%	12%	12%	12%	12%	12%	12%
FRANCE	6%	6%	6%	6%	6%	6%	6%	6%	6%	6%	6%	6%	6%	6%	6%	6%	6%	6%	6%	6%	6%	6%	6%	6%
GERMANY	2%	1%	2%	2%	2%	2%	2%	2%	2%	2%	2%	2%	2%	2%	2%	2%	2%	2%	2%	2%	2%	2%	2%	2%
NORWAY	2%	4%	5%	2%	3%	3%	3%	3%	3%	3%	3%	3%	3%	3%	3%	3%	3%	3%	3%	3%	3%	3%	3%	3%
SWEDEN	4%	2%	2%	4%	3%	3%	3%	3%	3%	3%	3%	3%	3%	3%	3%	3%	3%	3%	3%	3%	3%	3%	3%	3%
HOLLAND	3%	2%	2%	4%	3%	4%	4%	4%	4%	4%	4%	4%	4%	4%	4%	4%	4%	4%	4%	4%	4%	4%	4%	4%
BELGIUM	3%	3%	4%	4%	4%	4%	4%	4%	4%	4%	4%	4%	4%	4%	4%	4%	4%	4%	4%	4%	4%	4%	4%	4%
SWITZERLAND	3%	2%	3%	3%	3%	3%	3%	3%	3%	3%	3%	3%	3%	3%	3%	3%	3%	3%	3%	3%	3%	3%	3%	3%
FINLAND	0%	4%	3%	4%	3%	3%	4%	4%	4%	4%	4%	4%	4%	4%	4%	4%	4%	4%	4%	4%	4%	4%	4%	4%
DENMARK	3%	3%	3%	3%	3%	3%	3%	3%	3%	3%	3%	3%	3%	3%	3%	3%	3%	3%	3%	3%	3%	3%	3%	3%
AUSTRIA	2%	2%	3%	4%	5%	2%	4%	5%	2%	4%	5%	2%	4%	5%	2%	4%	5%	2%	4%	5%	2%	4%	5%	2%
SPAIN	3%	4%	7%	8%	8%	8%	8%	8%	8%	8%	8%	8%	8%	8%	8%	8%	8%	8%	8%	8%	8%	8%	8%	8%
PORTUGAL	20%	7%	10%	17%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%
ITALY	4%	4%	10%	9%	7%	10%	9%	7%	10%	9%	7%	10%	9%	7%	10%	9%	7%	10%	9%	7%	10%	9%	7%	10%
CANADA	3%	3%	5%	4%	1%	2%	4%	1%	2%	4%	1%	2%	4%	1%	2%	4%	1%	2%	4%	1%	2%	4%	1%	2%
USA	5%	4%	0%	3%	2%	4%	3%	2%	4%	3%	2%	4%	3%	2%	4%	3%	2%	4%	3%	2%	4%	3%	2%	4%
AUSTRALIA	4%	4%	4%	4%	4%	4%	4%	4%	4%	4%	4%	4%	4%	4%	4%	4%	4%	4%	4%	4%	4%	4%	4%	4%
OTHER	16%	14%	13%	16%	15%	10%	12%	13%	12%	12%	11%	10%	14%	16%	17%	17%	19%	18%	17%	19%	18%	17%	19%	18%
TOTAL	4%	4%	4%	4%	4%	4%	4%	4%	4%	4%	4%	4%	4%	4%	4%	4%	4%	4%	4%	4%	4%	4%	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 9

Accommodation Establishments by Category 1992 – 2009

	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Hotels	167	168	166	163	152	146	136	133	119	109	99	93	87	86	82	81	76	71
Guest Houses	198	188	168	150	129	104	93	84	76	68	59	54	54	50	49	49	42	43
Holiday Villages	2	2	2	2	2	2	2	2	2	0	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	24
Campsites	6	6	6	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4
Youth Hostel													1	1	1	1	1	1
<b>Total</b>	<b>393</b>	<b>384</b>	<b>363</b>	<b>342</b>	<b>314</b>	<b>285</b>	<b>266</b>	<b>258</b>	<b>236</b>	<b>216</b>	<b>191</b>	<b>177</b>	<b>167</b>	<b>166</b>	<b>161</b>	<b>159</b>	<b>145</b>	<b>142</b>

Accommodation Bed Spaces by Category 1992 – 2009

	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
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	9,045
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	982
Holiday Villages	823	823	823	821	821	807	789	769	769	0	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	760
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	1,250
Youth Hostel													110	110	110	114	114	0
<b>Total</b>	<b>24,770</b>	<b>24,634</b>	<b>23,954</b>	<b>22,109</b>	<b>21,710</b>	<b>20,738</b>	<b>20,148</b>	<b>19,681</b>	<b>18,112</b>	<b>16,388</b>	<b>14,947</b>	<b>14,347</b>	<b>13,703</b>	<b>13,398</b>	<b>13,053</b>	<b>13,050</b>	<b>12,771</b>	<b>12,037</b>

N.B. Self-catering attached to hotels/guest houses appear within the hotel /guest house totals. Figures may not agree with previous figures due to being measured at a different time of the year.

Appendix 10

**Bed space occupancy 2008 and 2009**

	2008	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Year
Bed nights available	166,127	170,068	218,755	298,362	298,362	386,165	379,500	394,320	395,320	380,823	296,057	212,416	187,655	3,485,588
Bed nights sold	31,789	56,348	83,475	137,296	137,296	288,027	282,266	312,115	326,812	270,423	198,938	57,226	45,871	2,030,566
<b>Total bed occupancy</b>	<b>19.12%</b>	<b>33.13%</b>	<b>38.16%</b>	<b>46.02%</b>	<b>46.02%</b>	<b>69.41%</b>	<b>74.39%</b>	<b>79.15%</b>	<b>82.67%</b>	<b>71.01%</b>	<b>53.68%</b>	<b>26.94%</b>	<b>24.44%</b>	<b>58.26%</b>
Hotel bed nights available	139,318	139,766	178,571	248,762	248,762	295,936	287,880	298,034	298,034	288,420	242,745	177,609	155,709	2,750,794
Guest House bed nights available	10,817	13,189	19,997	23,559	23,559	27,685	27,150	28,923	28,923	27,570	23,530	11,484	9,917	252,744
Serviced bed nights available	150,135	152,955	198,568	272,321	272,321	323,621	315,030	326,957	326,957	315,990	266,275	189,093	165,626	3,003,528
Unserviced bed nights available	15,992	17,113	20,187	26,041	26,041	62,544	64,470	67,363	68,363	64,833	29,782	23,323	22,029	482,040
Bed nights sold in serviced accommodation	30,382	54,086	79,477	131,723	131,723	234,148	242,257	253,236	270,057	244,185	142,794	53,450	42,042	1,777,837
Total bed occupancy in serviced	20.24%	35.36%	40.03%	48.37%	48.37%	72.35%	76.90%	77.45%	82.60%	77.28%	53.63%	28.27%	25.38%	59.19%
Hotel bed nights sold	27,941	51,114	76,525	124,380	124,380	217,313	223,988	233,489	248,706	225,896	133,681	51,186	40,228	1,654,447
Guest House bed nights sold	2,441	2,972	2,952	7,343	7,343	16,835	18,269	19,747	21,351	18,289	9,113	2,264	1,814	123,390
Hotel bed space occupancy	20.06%	36.57%	42.85%	50.00%	50.00%	73.43%	77.81%	78.34%	83.45%	78.32%	55.07%	28.82%	25.84%	60.14%
Guest House bed space occupancy	22.57%	22.53%	14.76%	31.17%	31.17%	60.81%	67.29%	68.27%	73.82%	66.34%	38.73%	19.71%	18.29%	48.82%
Other bed nights sold	1,387	2,262	3,998	5,573	5,573	33,879	40,009	58,879	56,755	26,238	16,144	3,776	3,829	252,729
Other bed space occupancy	8.67%	13.22%	19.80%	21.40%	21.40%	54.17%	62.06%	87.41%	83.02%	40.47%	54.21%	16.19%	17.38%	52.43%
2009		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Year
Bed nights available	166,855	176,845	218,005	297,621	297,621	356,809	357,620	377,891	376,588	357,511	276,784	196,416	184,527	3,345,472
Bed nights sold	26,845	43,388	74,627	122,070	122,070	232,379	254,039	302,127	316,160	256,713	152,262	54,100	52,751	1,887,461
<b>Total bed occupancy</b>	<b>16.09%</b>	<b>24.53%</b>	<b>34.23%</b>	<b>41.02%</b>	<b>41.02%</b>	<b>65.13%</b>	<b>71.04%</b>	<b>79.95%</b>	<b>83.95%</b>	<b>71.81%</b>	<b>55.01%</b>	<b>27.27%</b>	<b>28.59%</b>	<b>56.42%</b>
Hotel bed nights available	139,449	147,189	173,801	241,800	241,800	277,113	271,830	280,303	279,000	267,721	227,148	170,123	158,214	2,633,691
Guest House bed nights available	9,600	10,796	18,175	22,189	22,189	27,678	27,030	29,016	29,016	28,080	23,766	11,410	10,611	247,367
Serviced bed nights available	149,049	157,985	191,976	263,989	263,989	304,791	298,860	309,319	308,016	295,801	250,914	181,533	168,825	2,881,058
Unserviced bed nights available	17,806	18,860	26,029	33,632	33,632	52,018	58,760	68,572	68,572	61,710	25,870	16,883	15,702	484,414
Bed nights sold in serviced accommodation	24,273	38,832	70,944	114,767	114,767	192,830	213,222	240,079	246,192	224,738	136,796	49,916	48,348	1,600,937
Total bed occupancy in serviced	16.29%	24.58%	36.95%	43.47%	43.47%	63.27%	71.35%	77.62%	79.93%	75.98%	54.52%	27.50%	28.64%	55.57%
Hotel bed nights sold	22,884	37,227	66,319	108,535	108,535	177,781	196,723	222,698	228,496	208,823	128,066	47,634	46,262	1,491,448
Guest House bed nights sold	1,389	1,605	4,625	6,232	6,232	15,049	16,499	17,381	17,696	15,915	8,730	2,282	2,086	109,489
Hotel bed space occupancy	16.41%	25.29%	38.16%	44.89%	44.89%	64.15%	72.37%	79.45%	82.45%	78.00%	56.38%	28.00%	29.24%	56.63%
Guest House bed space occupancy	14.47%	14.87%	25.45%	28.09%	28.09%	54.37%	61.04%	59.90%	60.99%	56.68%	36.73%	20.00%	19.66%	44.26%
Other bed nights sold	2,572	4,556	3,683	7,303	7,303	39,549	40,817	62,048	36,339	31,975	15,466	4,184	4,403	252,895
Other bed space occupancy	14.44%	24.16%	14.15%	21.71%	21.71%	76.03%	69.46%	90.49%	94.00%	51.81%	59.78%	24.78%	28.04%	54.45%

Appendix 11

**Room space occupancy 2008 and 2009**

	2008	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Year
<b>Room nights available</b>	77,319	79,693	102,838	138,282	165,438	161,553	166,579	166,579	169,136	162,825	138,643	99,922	87,234	1,549,462
<b>Room nights sold</b>	22,906	37,117	52,293	70,582	123,117	127,151	136,862	136,862	147,860	136,040	92,999	39,080	28,301	1,004,308
<b>Room night occupancy</b>	30%	47%	51%	51%	74%	79%	82%	82%	87%	84%	60%	39%	32%	65%
Hotel room nights available	68,237	68,676	87,466	120,858	144,776	140,340	145,297	145,297	145,297	139,986	118,302	86,816	75,714	1,341,765
Guest House room nights available	5,230	6,343	9,811	11,703	13,747	13,480	13,291	13,291	14,291	13,620	11,612	6,231	4,849	124,208
Serviced room nights available	73,467	75,019	97,277	132,561	158,523	153,820	158,588	158,588	159,588	153,606	129,914	93,047	80,563	1,465,973
Other room nights available	3,852	4,674	5,561	5,721	6,915	7,733	7,991	7,991	9,548	9,219	8,729	6,875	6,671	83,489
Room nights sold in serviced accom	21,298	35,626	50,648	68,754	117,076	119,522	129,282	129,282	138,927	129,138	77,215	35,797	25,021	948,304
Total room occupancy in serviced	28.99%	47.49%	52.07%	51.87%	73.85%	77.70%	81.52%	81.52%	87.05%	84.07%	59.44%	38.47%	31.06%	64.69%
Hotel room nights sold	19,590	33,669	48,762	64,706	108,563	110,316	119,519	119,519	127,963	119,552	71,558	34,292	23,911	882,401
Guest House room nights sold	1,708	1,957	1,866	4,048	8,513	9,206	9,763	9,763	10,964	9,586	5,657	1,505	1,110	65,903
Hotel room occupancy	28.71%	49.03%	55.75%	53.54%	74.99%	78.61%	82.26%	82.26%	88.07%	85.40%	60.49%	39.50%	31.58%	65.76%
Guest House room occupancy	32.66%	30.85%	19.22%	34.59%	61.93%	68.29%	73.46%	73.46%	76.72%	70.36%	48.72%	24.15%	22.89%	53.06%
Other room nights sold	1,608	1,491	1,645	1,828	6,041	7,629	7,580	7,580	8,933	6,902	5,784	3,283	3,280	56,004
Other room occupancy	41.74%	31.90%	29.56%	31.95%	87.36%	98.66%	94.86%	94.86%	93.56%	74.87%	66.26%	47.75%	49.17%	67.08%
<b>2009</b>														
<b>Room nights available</b>	77,983	80,860	101,418	136,648	159,366	155,040	159,592	159,592	158,937	152,606	129,885	92,927	81,128	1,486,390
<b>Room nights sold</b>	20,867	30,176	45,338	62,677	107,112	117,488	130,744	130,744	136,622	115,889	79,513	35,312	31,980	913,718
<b>Room night occupancy</b>	27%	37%	45%	46%	67%	76%	82%	82%	86%	76%	61%	38%	39%	61%
Hotel room nights available	67,499	69,697	84,752	117,035	134,862	132,360	136,493	136,493	135,842	130,346	110,454	79,999	70,414	1,269,753
Guest House room nights available	4,745	5,317	9,030	11,073	13,716	13,380	14,326	14,326	14,322	13,860	11,743	6,250	4,510	122,272
Serviced room nights available	72,244	75,014	93,782	128,108	148,578	145,740	150,819	150,819	150,164	144,206	122,197	86,249	74,924	1,392,025
Other room nights available	5,739	5,846	7,636	8,540	10,788	9,300	8,773	8,773	8,773	8,400	7,688	6,678	6,204	94,365
Room nights sold in serviced accom	18,344	26,742	43,388	59,748	98,799	112,298	122,789	122,789	136,622	108,216	73,972	31,899	28,273	861,090
Total room occupancy in serviced	25.39%	35.65%	46.26%	46.64%	66.50%	77.05%	81.41%	81.41%	90.98%	75.04%	60.53%	36.98%	37.74%	61.86%
Hotel room nights sold	17,196	25,401	40,523	55,502	90,997	103,657	112,687	112,687	118,255	100,515	68,553	30,399	27,019	790,704
Guest House room nights sold	1,148	1,341	2,865	4,246	7,802	8,641	10,102	10,102	9,540	7,701	5,419	1,500	1,254	61,559
Hotel room occupancy	25.48%	36.44%	47.81%	47.42%	67.47%	78.31%	82.56%	82.56%	87.05%	77.11%	62.06%	38.00%	38.37%	62.27%
Guest House room occupancy	24.19%	25.22%	31.73%	38.35%	56.88%	64.58%	70.52%	70.52%	66.61%	55.56%	46.15%	24.00%	27.80%	50.35%
Other room nights sold	2,523	3,434	1,950	2,929	8,313	5,190	7,955	7,955	8,827	7,673	5,541	3,413	3,707	61,455
Other room occupancy	43.96%	58.74%	25.54%	34.30%	77.06%	55.81%	90.66%	90.66%	100.62%	91.35%	72.07%	51.11%	59.75%	65.12%

## Appendix 12

## Jersey Link - Jersey Tourism Central Reservations 2005-2009

	BOOKINGS			No. of People	No. of Bednights	Value of Bookings	Value per Bednight
	VSC	Web	Total				
<b>2005</b>							
January	68	197	265	561	2,141	£70,597	£32.97
February	86	219	305	706	2,471	£75,335	£30.49
March	102	308	410	918	3,241	£95,040	£29.32
April	174	330	504	1,118	3,823	£121,193	£31.70
May	252	286	538	1,142	3,608	£124,012	£34.37
June	300	345	645	1,375	4,654	£172,990	£37.17
July	327	358	685	1,484	4,955	£173,981	£35.11
August	378	486	864	1,855	5,772	£209,483	£36.29
September	364	374	738	1,417	4,259	£133,385	£31.32
October	135	267	402	839	2,147	£61,758	£28.76
November	58	177	235	446	1,161	£34,789	£29.96
December	45	140	185	394	1,144	£34,290	£29.97
<b>Total</b>	<b>2,289</b>	<b>3,487</b>	<b>5,776</b>	<b>12,255</b>	<b>39,376</b>	<b>£1,306,853</b>	<b>£33.19</b>
<b>2006</b>							
January	51	354	405	908	3,317	£103,264	£31.13
February	54	368	422	961	3,707	£114,409	£30.86
March	119	468	587	1,321	4,641	£149,230	£32.15
April	153	402	555	1,267	3,992	£135,845	£34.03
May	181	441	622	1,364	4,743	£168,505	£35.53
June	207	446	653	1,328	4,443	£164,434	£37.01
July	286	507	793	1,712	5,964	£227,139	£38.09
August	320	401	721	1,559	4,739	£173,301	£36.57
September	231	250	481	928	2,724	£93,229	£34.23
October	101	234	335	664	1,937	£55,955	£28.89
November	75	167	242	442	1,257	£39,108	£31.11
December	34	127	161	327	1,138	£35,412	£31.12
<b>Total</b>	<b>1,812</b>	<b>4,165</b>	<b>5,977</b>	<b>12,781</b>	<b>42,602</b>	<b>£1,459,831</b>	<b>£34.27</b>
<b>2007</b>							
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	£35.66
April	124	470	594	1,327	4,233	£150,781	£35.62
May	165	610	775	1,648	5,428	£200,064	£36.86
June	190	531	721	1,510	4,923	£194,736	£39.56
July	190	520	710	1,561	5,104	£210,947	£41.33
August	209	472	681	1,428	4,539	£177,337	£39.07
September	194	305	499	956	2,806	£98,957	£35.27
October	76	209	285	609	1,769	£49,130	£27.77
November	44	121	165	333	957	£30,162	£31.52
December	13	68	81	173	575	£16,845	£29.30
<b>Total</b>	<b>1,414</b>	<b>4,603</b>	<b>6,017</b>	<b>12,955</b>	<b>42,735</b>	<b>£1,555,654</b>	<b>£36.40</b>
<b>2008</b>							
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
<b>Total</b>	<b>875</b>	<b>3,497</b>	<b>4,372</b>	<b>9,224</b>	<b>30,720</b>	<b>£1,156,832</b>	<b>£37.66</b>
<b>2009</b>							
January	22	230	252	573	2,615	£91,952	£35.16
February	31	303	334	750	2,684	£97,397	£36.29
March	32	336	368	836	2,930	£111,629	£38.10
April	83	402	485	1,081	3,825	£151,689	£39.66
May	94	471	565	1,210	4,158	£168,120	£40.43
June	94	459	553	1,185	3,921	£168,376	£42.94
July	100	502	602	1,269	4,251	£180,886	£42.55
August	113	455	568	1,172	3,396	£144,377	£42.51
September	110	262	372	733	2,068	£76,514	£37.00
October	19	125	144	288	806	£25,820	£32.03
November	16	88	104	193	589	£19,573	£33.23
December	11	69	80	157	478	£16,696	£34.93
<b>Total</b>	<b>725</b>	<b>3,702</b>	<b>4,427</b>	<b>9,447</b>	<b>31,721</b>	<b>£1,253,029</b>	<b>£39.50</b>
<b>2009 vs. 2008</b>	<b>-17%</b>	<b>6%</b>	<b>1%</b>	<b>2%</b>	<b>3%</b>	<b>8%</b>	<b>5%</b>

VSC = Visitor Services Centre, Jersey Tourism

Web = Jersey Tourism Website - www.jersey.com

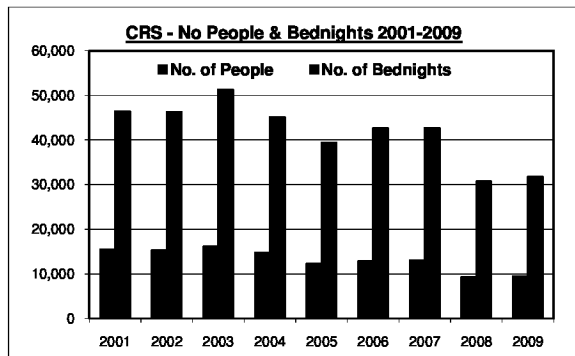
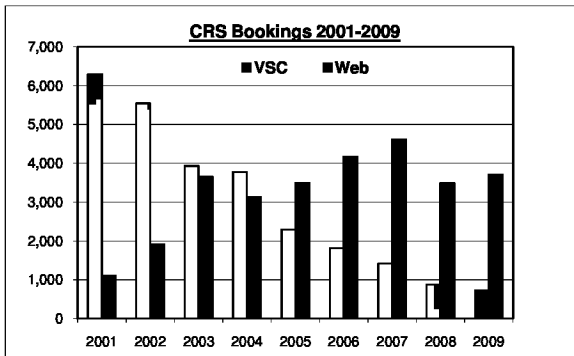
N.B. This data is collated based on monthly reports. Any booking modifications made after the release of these figures will have slightly altered the actual achieved data that is reported on in section 5.1 of the report.

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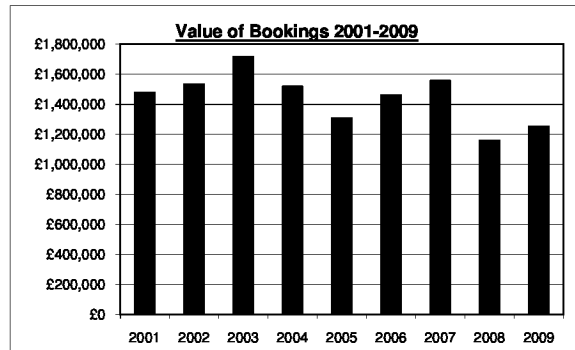
Appendix 13

**JerseyLink - Jersey Tourism Central Reservations**

	BOOKINGS			No. of People	No. of Bednights	Value of Bookings	Value per Bednight
	VSC	Web	Total				
2001	6,294	1,102	7,396	15,487	46,346	£1,476,600	£31.86
2002	5,538	1,912	7,450	15,308	46,228	£1,534,316	£33.19
2003	3,926	3,655	7,581	16,142	51,268	£1,714,211	£33.44
2004	3,777	3,130	6,907	14,748	45,153	£1,518,286	£33.63
2005	2,289	3,487	5,776	12,255	39,376	£1,306,853	£33.19
2006	1,812	4,165	5,977	12,781	42,602	£1,459,831	£34.27
2007	1,414	4,603	6,017	12,955	42,735	£1,555,654	£36.40
2008	875	3,497	4,372	9,224	30,720	£1,156,832	£37.66
2009	725	3,702	4,427	9,447	31,721	£1,253,029	£39.50



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



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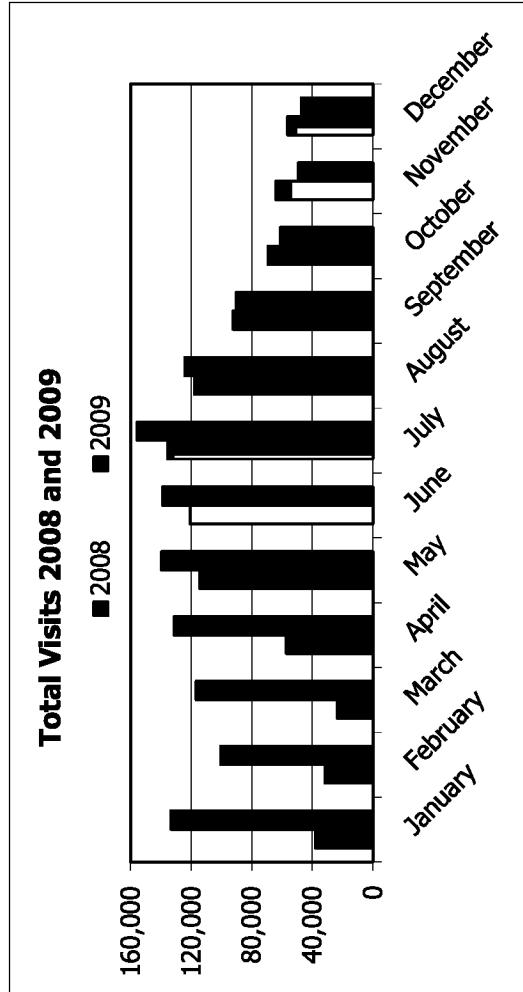


## Appendix 14.1

Total visits to [www.jersey.com](http://www.jersey.com)

	<b>2008</b>	<b>2009</b>
January	37,811	133,488
February	31,775	100,419
March	23,273	116,726
April	57,127	131,164
May	114,242	139,506
June	120,737	138,809
July	135,643	155,626
August	117,762	123,990
September	92,250	90,271
October	69,374	61,126
November	64,121	49,174
December	56,209	47,420
<b>Total</b>	<b>920,324</b>	<b>1,287,719</b>

source: Google Analytics



## Appendix 14.2

### Visits to www.jersey.com by country of residence

	<u>UK</u>		<u>France</u>		<u>Germany</u>	
	<u>2008</u>	<u>2009</u>	<u>2008</u>	<u>2009</u>	<u>2008</u>	<u>2009</u>
January		96,305		6,228		4,412
February		60,089		8,826		8,480
March		69,625		12,498		9,493
April	42,092	77,990	5,088	17,426	1,898	6,094
May	86,306	84,225	8,106	15,777	3,707	8,321
June	92,527	85,851	6,988	12,184	4,508	6,009
July	103,435	90,011	9,196	20,362	4,899	6,039
August	90,998	73,718	7,816	12,852	4,182	4,678
September	71,224	50,044	4,503	9,550	3,225	3,144
October	48,294	26,365	6,502	9,799	2,268	2,723
November	39,369	18,179	4,450	6,493	2,357	2,485
December	31,030	17,211	4,445	6,298	2,188	2,670
<b>Total</b>	<b>605,275</b>	<b>749,613</b>	<b>57,094</b>	<b>138,293</b>	<b>29,232</b>	<b>64,548</b>

Source: Google Analytics

Appendix 15

Total Passenger Arrivals 2001 - 2009

	TOTAL AIR ARRIVALS												TOTAL SEA ARRIVALS												TOTAL ARRIVALS											
	2002	2003	2004	2005	2006	2007	2008	2009	2002	2003	2004	2005	2006	2007	2008	2009	2002	2003	2004	2005	2006	2007	2008	2009												
JAN	38,160	37,920	36,994	38,482	38,803	41,646	43,417	38,885	6,970	6,890	5,324	6,788	7,022	7,345	6,669	6,000	46,130	44,750	42,308	45,250	45,825	48,991	50,066	46,056												
FEB	40,840	40,300	41,884	40,486	41,593	44,208	48,938	42,565	8,200	8,870	9,657	11,609	8,731	8,655	10,057	9,002	49,050	49,170	51,541	52,095	50,224	52,863	59,995	51,567												
MAR	51,790	51,310	51,014	52,667	52,693	55,439	60,822	52,914	17,890	15,460	11,597	18,616	11,516	13,192	12,484	11,686	69,620	66,770	62,611	71,283	64,149	70,681	73,306	64,600												
APR	58,230	65,200	63,609	57,454	62,488	62,562	66,970	60,142	35,840	42,930	39,690	34,738	35,542	38,785	32,090	34,126	94,070	109,250	103,239	92,182	86,040	101,347	99,050	94,267												
MAY	71,890	74,660	74,147	74,482	69,421	73,530	81,287	71,399	52,390	53,020	47,856	48,451	40,192	45,887	47,905	45,059	124,270	127,680	122,003	122,843	109,603	119,417	120,192	116,457												
JUN	81,190	76,300	76,232	75,288	76,796	79,165	78,587	72,778	66,440	57,970	55,019	55,220	47,622	49,305	49,391	45,537	148,640	139,260	131,281	131,468	124,568	128,470	127,088	118,315												
JUL	79,800	82,060	85,930	84,766	84,076	83,093	86,307	80,546	70,440	62,650	63,816	63,384	54,421	54,362	55,424	54,045	150,240	144,710	148,746	148,150	138,487	138,045	138,731	134,391												
AUG	87,650	89,050	84,852	83,871	82,740	89,233	92,544	84,332	90,640	84,020	74,035	83,258	66,818	71,686	72,516	75,513	178,290	173,070	168,887	167,129	149,558	160,519	165,060	159,845												
SEP	73,030	71,940	76,518	76,000	76,895	79,938	77,699	72,714	58,510	52,770	50,047	53,882	48,779	47,327	38,751	42,786	131,540	124,720	126,565	129,682	125,614	127,260	116,390	115,500												
OCT	60,160	58,350	66,041	62,342	63,127	65,238	64,671	61,009	26,440	32,140	24,658	28,974	23,206	29,993	20,126	22,766	86,600	90,490	90,699	91,316	86,333	89,231	84,797	83,775												
NOV	48,580	46,650	46,616	48,812	52,628	56,720	50,591	49,047	11,590	10,010	11,870	11,315	11,017	11,928	8,705	7,676	60,160	56,680	58,488	61,127	63,645	68,648	59,286	56,723												
DEC	44,050	44,540	45,302	46,285	49,269	50,886	47,721	46,481	12,270	9,190	11,442	10,278	10,882	8,637	9,169	10,690	56,330	53,730	56,744	56,563	59,151	59,523	56,890	57,171												
SUMMER	167,450	171,110	170,792	168,637	166,816	172,326	178,851	164,878	161,090	146,670	137,851	146,642	121,289	126,638	125,940	129,559	328,530	317,780	308,633	315,279	298,055	298,964	304,791	294,436												
SPRING	211,310	215,280	213,988	207,214	206,685	215,257	228,914	204,319	156,660	153,920	142,905	139,409	123,846	133,877	128,516	124,720	367,990	369,190	356,493	346,623	332,201	348,234	355,390	329,039												
AUTUMN	133,190	130,290	142,599	138,342	139,942	145,171	142,310	133,723	84,950	84,910	74,705	82,826	71,985	71,320	58,877	65,582	218,140	215,210	217,264	221,168	211,947	216,491	201,187	199,279												
WINTER	223,370	220,720	221,802	227,732	233,926	248,899	252,479	230,902	56,910	50,360	49,890	53,596	49,188	51,757	47,084	45,854	280,290	271,080	271,682	266,518	233,094	300,655	239,563	276,765												
YEAR	735,320	737,400	749,131	741,925	749,359	781,683	800,454	739,922	499,600	435,680	404,951	427,463	365,588	383,682	360,417	365,684	1,194,940	1,173,260	1,154,082	1,169,388	1,115,297	1,165,945	1,160,871	1,099,506												

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.  
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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 - 2009

	UK AIR ARRIVALS												UK SEA ARRIVALS												TOTAL UK ARRIVALS											
	2001	2002	2003	2004	2005	2006	2007	2008	2009	2001	2002	2003	2004	2005	2006	2007	2008	2009	2001	2002	2003	2004	2005	2006	2007	2008	2009									
JAN	30,885	29,871	30,113	30,447	31,798	32,078	34,546	35,950	32,077	1,548	2,282	2,032	1,588	1,244	1,507	1,561	1,453	1,387	32,433	32,073	32,145	32,035	33,032	33,583	36,107	36,107	36,414									
FEB	32,398	32,822	32,177	35,296	33,881	35,520	37,090	41,709	34,985	3,386	2,720	2,484	2,510	2,418	1,837	1,719	2,062	1,753	35,782	35,942	34,661	37,008	36,289	37,157	39,749	39,749	39,738									
MAR	40,519	42,379	42,011	42,972	44,855	44,473	47,577	52,244	44,470	4,749	6,515	5,043	4,282	5,541	3,151	3,507	3,238	3,401	45,268	49,894	47,824	47,294	50,398	47,824	51,084	51,084	47,871									
APR	55,240	47,518	55,714	54,972	49,274	54,183	55,842	58,838	50,513	12,739	10,569	10,783	9,476	8,755	8,492	8,387	6,508	6,523	67,979	58,065	66,477	64,378	58,029	62,875	64,039	64,039	59,086									
MAY	64,943	59,890	65,440	64,237	65,267	59,907	65,454	69,398	61,135	13,583	12,892	13,045	10,083	10,576	9,396	9,347	10,049	10,188	78,526	72,562	78,485	74,300	75,533	80,303	74,801	74,801	71,321									
JUN	71,688	69,682	65,653	66,233	65,249	66,231	68,156	66,965	61,667	15,917	18,216	18,753	12,589	12,165	10,002	10,377	9,451	11,093	87,615	87,688	79,406	78,822	77,434	78,233	78,533	78,533	72,760									
JUL	75,894	69,104	71,505	75,181	74,411	74,204	73,954	73,944	66,830	20,284	20,284	18,379	17,301	15,910	13,177	13,898	12,825	14,117	94,854	89,988	89,914	92,482	90,321	87,381	87,250	87,250	82,947									
AUG	79,616	77,389	80,054	75,975	73,975	73,244	79,444	80,483	73,282	23,530	24,695	23,574	21,683	22,133	17,759	17,243	18,894	19,859	103,188	102,084	102,628	97,658	98,108	91,003	98,887	98,887	83,121									
SEP	70,284	63,084	62,915	66,917	68,287	67,205	70,377	65,240	62,334	17,070	16,408	15,170	13,488	12,291	10,442	10,214	9,013	10,785	87,334	79,498	78,085	80,403	78,588	77,847	80,391	80,391	78,119									
OCT	47,819	51,495	49,673	56,012	52,834	54,042	56,778	54,532	52,587	11,034	10,191	10,382	8,228	8,690	8,387	8,122	6,720	7,435	58,853	61,688	60,065	64,238	61,614	62,429	64,900	64,900	60,022									
NOV	37,219	38,334	38,455	38,345	41,888	44,848	47,882	41,830	40,875	4,842	4,498	3,306	3,455	3,018	3,004	2,835	1,975	2,259	41,861	43,833	41,761	41,800	44,701	47,880	50,327	50,327	42,854									
DEC	34,758	37,282	35,443	39,813	40,382	42,108	44,455	40,853	39,959	3,194	2,788	2,594	2,417	2,131	2,282	2,023	2,293	2,474	37,942	40,078	41,057	41,285	42,323	44,398	48,478	48,478	42,433									
SUMMER	155,510	146,488	151,589	151,158	148,898	147,448	152,798	154,337	142,882	42,590	44,859	40,853	38,984	38,043	30,889	31,139	31,819	33,978	198,000	191,452	192,542	190,140	198,429	178,834	183,837	183,837	176,068									
SPRING	191,881	177,088	188,807	185,442	179,760	180,321	189,232	183,081	173,815	42,289	41,477	37,581	32,058	31,516	27,890	28,121	28,008	29,002	234,120	218,565	224,368	217,500	211,298	208,211	217,378	217,378	203,117									
AUTUMN	117,883	114,579	112,388	122,929	119,231	121,247	127,155	119,582	114,821	26,104	26,600	25,382	21,772	20,971	18,829	18,388	15,733	18,220	145,987	141,179	138,150	144,941	140,822	140,078	145,491	145,491	133,141									
WINTER	175,747	181,498	181,139	185,880	192,599	198,321	211,300	212,288	192,188	17,509	18,722	15,459	14,232	14,352	11,821	11,645	11,018	11,224	183,256	200,220	198,658	208,851	210,942	222,945	222,945	222,945	203,390									
YEAR	641,021	619,659	632,183	643,407	639,898	647,837	680,505	679,228	622,884	139,432	131,758	119,635	106,986	104,882	89,876	89,241	84,578	83,222	771,433	781,416	791,718	792,383	744,878	737,313	789,748	789,748	715,716									

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 - 2009

	INTER ISLAND AIR ARRIVALS												INTER ISLAND SEA ARRIVALS												TOTAL INTER ISLAND ARRIVALS											
	2001	2002	2003	2004	2005	2006	2007	2008	2009	2001	2002	2003	2004	2005	2006	2007	2008	2009	2001	2002	2003	2004	2005	2006	2007	2008	2009									
JAN	5,765	5,890	5,191	4,716	5,051	4,835	5,800	5,883	5,095	150	380	270	731	220	583	414	845	281	5,915	6,270	5,461	5,447	5,315	6,483	6,214	6,730	5,376									
FEB	6,032	5,833	6,217	5,995	5,198	5,051	6,049	5,396	5,396	487	805	625	1,006	1,390	759	699	570	827	6,520	6,638	6,486	6,454	6,705	7,242	6,913	7,307	6,203									
MAR	7,338	6,823	6,888	6,578	6,154	6,669	7,258	7,071	6,569	984	2,300	1,015	1,432	2,498	1,221	1,547	924	917	8,322	9,131	7,893	8,008	7,566	7,890	8,383	7,985	7,506									
APR	6,848	7,108	6,098	6,022	5,781	5,588	5,673	7,249	5,705	8,175	5,815	7,253	5,442	5,833	4,532	5,019	3,553	4,083	13,023	12,421	13,351	11,484	11,223	10,120	10,822	10,922	9,788									
MAY	7,289	6,938	5,382	6,410	5,827	5,846	6,044	7,052	5,835	9,891	8,109	9,471	7,588	7,124	5,302	7,314	7,583	7,259	16,980	15,047	15,083	14,003	13,520	11,350	13,358	14,655	12,884									
JUN	7,154	5,972	5,470	6,358	6,356	6,827	7,151	7,143	7,023	11,659	13,042	9,511	7,768	8,173	7,656	7,285	7,257	6,440	18,813	19,014	14,381	14,139	14,139	14,483	14,418	14,400	13,483									
JUL	6,532	5,985	6,016	6,164	5,888	5,882	5,818	7,019	6,221	11,500	12,884	11,652	9,928	10,209	8,192	8,198	7,827	8,994	18,032	18,849	17,868	16,090	15,814	14,074	14,008	14,948	15,215									
AUG	6,582	5,912	4,842	5,127	5,595	5,679	5,854	6,572	5,513	17,414	17,464	14,198	10,890	12,110	11,871	12,514	11,089	12,943	23,878	23,388	18,840	15,817	16,195	17,350	18,368	17,461	18,258									
SEP	7,303	6,721	5,921	6,211	6,339	6,295	6,400	7,243	6,394	9,890	10,885	6,002	7,481	6,847	6,594	7,325	5,340	6,210	17,233	17,806	13,923	13,662	13,820	14,889	13,925	12,538	12,774									
OCT	7,284	6,448	6,482	6,933	6,443	6,711	6,613	7,389	6,694	3,563	5,881	7,719	4,062	6,659	3,398	4,387	2,486	2,383	10,847	12,108	14,181	10,995	10,535	10,897	11,000	9,885	9,077									
NOV	7,078	7,484	6,997	7,423	6,907	6,915	7,564	7,058	7,131	683	887	1,182	879	834	688	1,088	631	708	8,841	8,381	8,179	8,302	7,788	7,551	8,682	7,889	7,887									
DEC	5,739	5,484	5,125	5,729	5,133	5,255	5,274	5,890	5,385	1,705	1,387	1,244	1,485	1,480	1,731	1,037	1,158	1,384	7,443	7,071	6,939	7,214	6,619	7,038	6,311	6,538	6,889									
SUMMER	13,094	11,877	10,658	11,291	11,383	11,581	11,872	13,391	11,584	28,914	30,108	25,850	20,616	22,319	19,883	20,702	18,916	21,387	42,008	41,985	36,508	31,907	32,009	31,424	32,374	32,307	33,471									
SPRING	21,281	20,018	17,180	18,788	18,084	18,283	19,088	21,444	18,383	27,585	28,488	28,235	20,818	20,880	17,880	19,588	18,383	17,782	48,018	48,482	43,395	39,608	38,882	35,853	38,668	39,837	38,125									
AUTUMN	14,587	13,189	12,383	13,114	12,782	13,008	13,013	14,682	13,258	13,488	16,548	15,721	11,573	14,388	11,880	11,972	7,888	8,388	28,080	28,715	28,104	24,887	24,355	24,388	24,925	22,488	21,851									
WINTER	32,881	30,833	30,418	30,009	28,433	28,795	31,085	31,161	29,558	3,979	5,817	4,345	5,583	6,420	4,880	4,785	3,628	4,215	38,870	38,750	34,783	35,542	33,988	33,875	35,850	34,789	33,811									
YEAR	81,883	76,886	70,619	73,202	70,672	71,625	74,838	80,628	72,751	73,911	79,037	72,151	58,540	63,725	54,413	56,977	48,773	52,307	155,774	164,832	145,770	131,742	129,212	128,038	131,818	128,401	125,259									

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.  
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Appendix 18

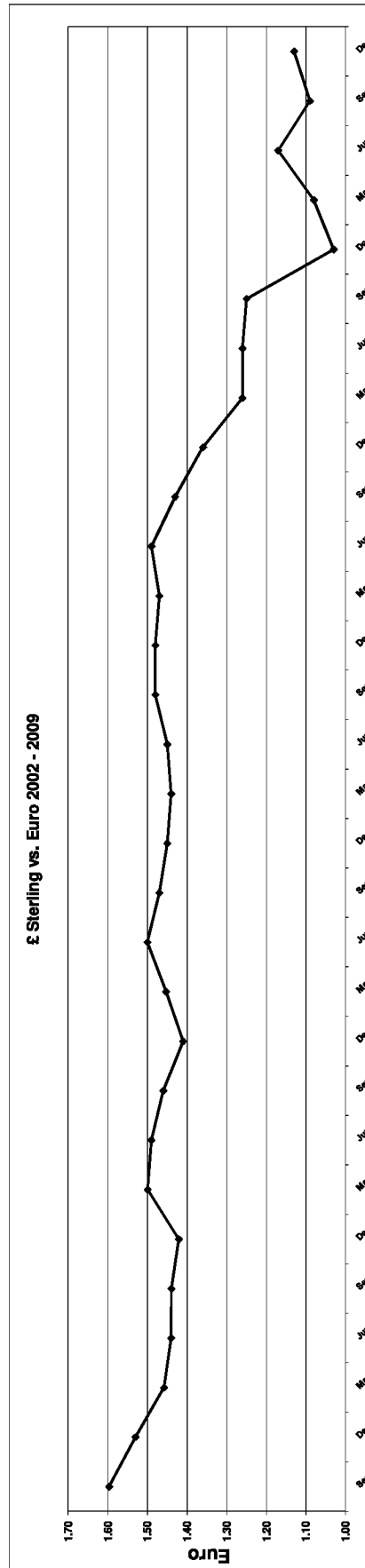
Continental Passenger Arrivals 2001 - 2009

	CONTINENTAL AIR ARRIVALS												CONTINENTAL SEA ARRIVALS												TOTAL CONTINENTAL ARRIVALS											
	2001	2002	2003	2004	2005	2006	2007	2008	2009	2001	2002	2003	2004	2005	2006	2007	2008	2009	2001	2002	2003	2004	2005	2006	2007	2008	2009									
JAN	3,936	2,886	2,617	1,821	1,843	1,892	1,800	1,984	2,729	3,412	4,489	4,520	3,005	5,904	4,982	5,370	4,871	5,282	6,718	7,882	7,137	4,826	6,947	6,874	7,170	6,855	7,955									
FEB	2,628	2,358	1,907	1,021	1,417	1,222	1,487	2,180	2,184	5,217	4,678	5,783	6,141	7,811	6,195	6,237	7,425	6,422	5,045	7,286	7,670	7,182	9,228	7,357	7,724	9,685	8,006									
MAR	2,890	2,327	2,410	1,468	1,658	1,491	606	1,855	1,855	7,344	9,083	9,404	5,903	10,579	7,144	10,138	6,322	7,880	10,824	11,590	11,814	7,389	12,287	8,635	10,744	9,629	9,223									
APR	4,781	3,808	3,528	2,615	2,389	2,727	1,847	3,083	3,924	21,943	19,858	24,910	24,782	20,800	22,518	25,389	22,019	21,539	28,124	23,561	28,418	27,387	22,989	25,245	28,418	25,102	25,483									
MAY	4,412	5,084	3,826	3,500	3,308	3,886	2,052	4,837	4,829	30,102	31,576	30,505	30,200	30,751	25,264	29,228	30,273	27,813	34,514	38,040	34,131	33,700	34,059	29,950	31,258	35,110	32,942									
JUN	5,610	5,539	4,173	3,643	3,683	3,678	3,658	4,419	4,088	38,183	37,184	34,704	34,647	35,882	30,184	31,683	31,823	28,004	41,789	42,728	38,877	38,290	39,525	38,842	35,321	38,242	32,852									
JUL	5,685	4,730	4,513	4,585	4,467	3,990	3,821	5,444	5,495	35,897	37,492	32,818	36,589	37,285	33,052	32,868	32,772	30,934	41,382	42,222	37,129	41,174	41,732	37,042	38,789	38,218	36,429									
AUG	4,710	4,349	4,355	3,750	4,391	3,817	3,855	5,879	5,737	50,846	48,519	47,245	41,882	49,015	37,888	41,929	42,453	42,711	55,558	52,686	51,800	45,412	53,408	41,205	45,884	46,112	46,468									
SEP	4,208	3,228	3,108	3,890	3,384	3,335	3,156	5,156	3,816	31,127	31,214	29,802	28,080	32,914	29,743	29,588	24,388	25,791	35,835	34,442	32,710	32,470	38,278	33,078	32,744	29,554	29,807									
OCT	2,444	2,212	2,217	3,128	2,985	2,374	1,847	2,850	1,728	10,173	10,588	14,029	12,340	14,635	11,453	11,494	10,910	12,948	12,817	12,800	16,246	15,488	17,800	13,807	13,331	13,840	14,878									
NOV	2,731	1,749	1,198	850	1,222	867	1,464	1,888	1,241	6,867	6,108	5,519	7,588	7,463	7,347	8,025	6,089	4,711	9,388	7,844	6,715	8,388	6,885	8,214	9,489	7,782	5,952									
DEC	1,498	1,287	972	755	780	898	1,157	1,708	1,137	7,741	7,888	5,352	7,540	6,857	6,859	5,577	5,723	6,712	9,237	9,185	8,324	8,235	7,417	7,887	8,794	7,429	7,949									
SUMMER	10,395	9,079	8,688	6,835	6,858	7,807	7,858	11,123	11,252	86,543	86,011	79,881	78,251	88,260	70,440	74,787	75,205	73,845	96,838	95,090	88,729	86,586	95,138	78,247	82,653	86,328	84,887									
SPRING	14,803	14,211	11,307	9,758	9,370	10,071	6,837	12,339	12,841	87,808	88,713	90,119	89,829	87,213	77,886	86,258	84,115	77,158	102,431	102,824	101,428	99,387	98,583	80,837	93,105	98,454	89,737									
AUTUMN	6,652	5,440	5,325	6,518	6,329	5,709	5,083	6,088	5,544	41,300	41,802	43,881	41,420	47,549	41,178	41,072	35,308	38,739	47,882	47,242	48,988	47,988	47,988	48,885	48,075	43,894	44,283									
WINTER	13,341	11,644	9,102	5,813	6,700	6,310	6,514	9,050	9,140	30,381	32,273	30,358	30,125	37,814	32,467	35,347	32,440	30,415	43,722	43,817	39,680	38,038	44,514	38,777	41,881	41,480	39,555									
YEAR	45,181	39,774	34,602	30,522	31,257	29,897	28,310	40,898	36,577	245,852	248,799	244,189	239,425	259,856	222,048	227,474	227,068	219,855	291,043	288,573	278,771	269,247	290,113	251,948	283,784	41,480	258,532									

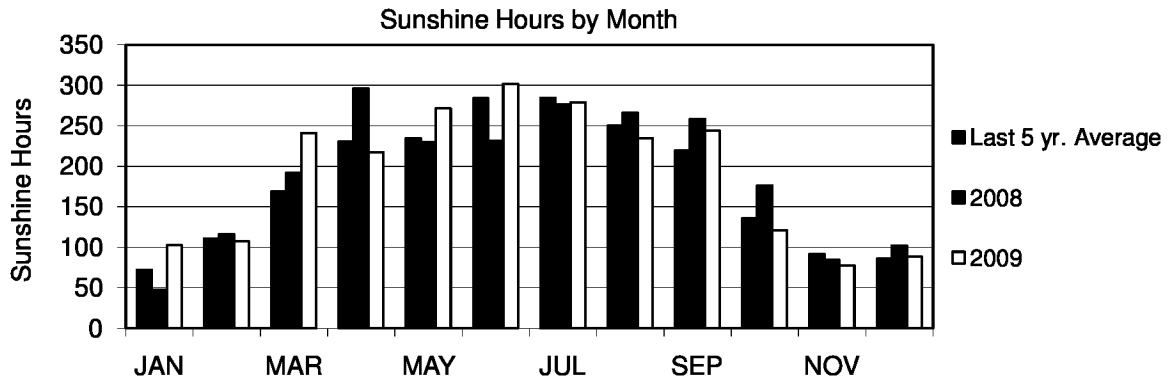
Figures are based upon detailed reports provided by the Harbour Office and Jersey Airport  
 N.B. Figures are for all passenger arrivals and include returning residents, day trippers and business visitors.  
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**Appendix 19**  
**Selected exchange rates against sterling since September 2002**

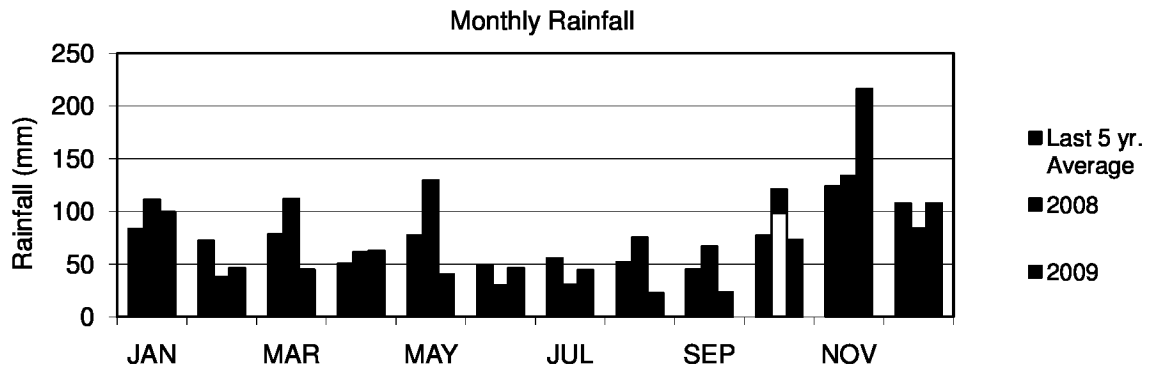
	Den	Nor	Swe	Swz	Euro	USA	Can	Aus	Japan	
2002 Sep	11.86	14.61	2.34	1.60	1.56	2.46	2.87	190.96	Sep 2002	
2002 Dec	11.40	14.05	2.23	1.53	1.60	2.53	2.85	190.13	Dec 2002	
2003 Mar	10.83	13.51	2.15	1.46	1.57	2.30	2.61	186.32	Mar 2003	
2003 Jun	10.73	13.96	2.23	1.44	1.65	2.23	2.48	197.39	Jun 2003	
2003 Sep	10.69	12.84	2.22	1.42	1.66	2.25	2.46	194.51	Sep 2003	
2003 Dec	10.58	12.89	2.22	1.42	1.78	2.33	2.38	190.39	Dec 2003	
2004 Mar	11.14	12.64	2.34	1.50	1.83	2.39	2.42	193.02	Mar 2004	
2004 Jun	11.09	12.48	2.28	1.49	1.81	2.43	2.62	195.13	Jun 2004	
2004 Sep	10.87	12.21	2.27	1.46	1.80	2.29	2.52	196.41	Sep 2004	
2004 Dec	10.49	11.64	2.18	1.41	1.92	2.32	2.47	197.96	Dec 2004	
2005 Mar	10.82	11.89	2.25	1.45	1.88	2.29	2.44	202.24	Mar 2005	
2005 Jun	11.14	11.82	2.31	1.50	1.80	2.21	2.37	196.06	Jun 2005	
2005 Sep	10.94	11.48	2.28	1.47	1.76	2.06	2.32	196.19	Sep 2005	
2005 Dec	10.77	11.95	2.24	1.45	1.88	2.34	2.43	195.00	Dec 2005	
2006 Mar	10.73	11.46	2.27	1.44	1.75	2.03	2.45	200.79	Mar 2006	
2006 Jun	10.78	11.42	2.26	1.45	1.81	2.02	2.48	210.51	Jun 2006	
2006 Sep	11.02	12.13	2.39	1.48	1.87	2.08	2.51	220.82	Sep 2006	
2006 Dec	11.06	12.19	2.39	1.48	1.96	2.28	2.48	233.20	Dec 2006	
2007 Mar	10.87	11.94	2.39	1.47	1.96	2.27	2.43	231.44	Mar 2007	
2007 Jun	11.05	11.85	2.46	1.49	2.00	2.31	2.36	247.77	Jun 2007	
2007 Sep	10.66	11.09	2.37	1.43	2.02	2.03	2.30	234.08	Sep 2007	
2007 Dec	10.11	10.79	2.25	1.36	1.99	1.85	2.27	225.43	Dec 2007	
2008 Mar	9.41	10.17	1.99	1.26	1.99	2.03	2.17	198.35	Mar 2008	
2008 Jun	9.43	10.09	2.03	1.26	1.99	2.01	2.07	211.39	Jun 2008	
2008 Sep	9.35	10.44	1.98	1.25	1.81	1.87	2.22	186.73	Sep 2008	
2008 Dec	7.70	10.75	1.63	1.03	1.43	1.77	2.06	130.33	Dec 2008	
2009 Mar	8.04	9.68	1.63	1.08	1.43	1.80	2.06	141.57	Mar 2009	
2009 Jun	8.74	10.60	1.79	1.17	1.65	1.91	2.04	156.90	Jun 2009	
2009 Sep	8.15	9.28	1.18	1.66	1.09	1.60	1.72	1.81	143.20	Sep 2009
2009 Dec	8.39	8.37	1.67	1.13	1.62	1.70	1.80	150.51	Dec 2009	



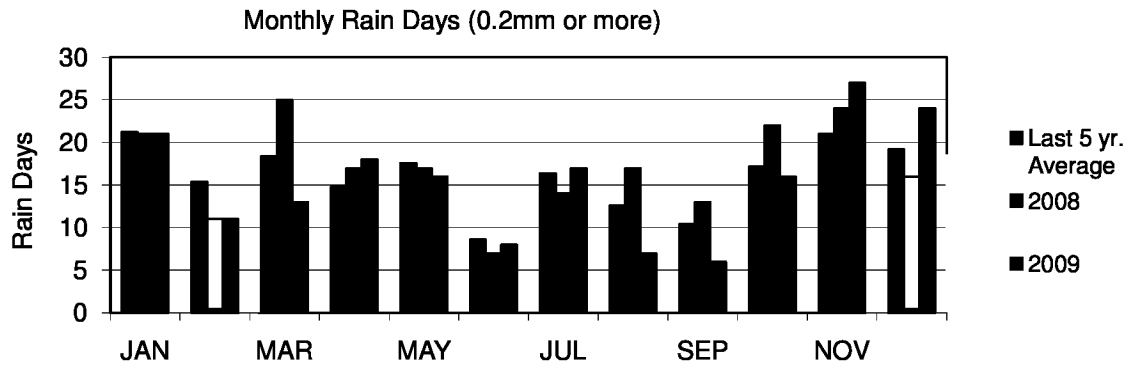
**Appendix 20**



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](http://www.jerseymet.gov.je)





# VISITOR REGISTRATION CARD

0362784

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

<b>NUMBER IN ROOM</b>	<b>Adults</b>	<b>Childen under 16</b>	<b>VRC</b>	<b>ARRIVAL DATE</b>	<b>DEPARTURE DATE</b>	
<b>FIRST ADULT (16+)</b> (full name and nationality must be completed for all adults within a room)				<b>20</b>	<b>20</b>	
Surname				<b>MAIN PURPOSE OF VISIT</b> (First adult only)	Sport Conference Other	
Forename				<b>COUNTRY OF RESIDENCE</b> (First adult only)	U.K. Ireland Jersey Other C.I.	
Title (Mr/s etc.)			<b>19</b>	Other (please state)		
Nationality				<b>HOME ADDRESS</b>		
<b>SECOND ADULT (16+)</b>				House No.	Postcode	
Surname				House Address		
Forename				<b>WHEN DID YOU BOOK YOUR VISIT?</b>		
Nationality				Less than 1 month ago	1-3 months ago	More than 3 months ago
<b>THIRD ADULT (16+)</b>				<b>DID YOU BOOK YOUR ACCOMMODATION DIRECT WITH THE ESTABLISHMENT?</b>		
Surname				No Yes		
Forename				<b>HOW DID YOU TRAVEL TO JERSEY?</b>		
Nationality				By air By sea		
<b>FOURTH ADULT (16+)</b>				<b>HAVE YOU VISITED JERSEY BEFORE?</b>		
Surname				No Yes		
Forename				<b>SIGNATURE</b>		
Nationality						

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

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

For further information visit

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

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