Jersey Tourism Product Audit

FINAL

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PREPARED FOR VISIT JERSEY

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1 INTRODUCTION

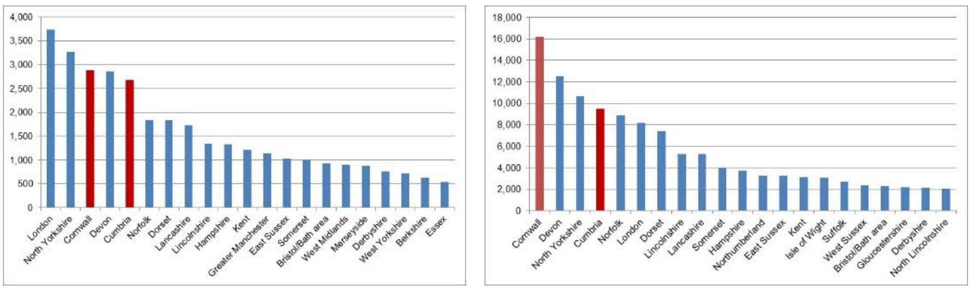
The main aim of this work is to produce a comprehensive database of the tourism product in Jersey and to use it to identify, in broad terms, where improvements might be made that would be optimal in terms of enabling the island to deliver its growth objective for tourism, respond to changing market conditions, and be consistent with Jersey brand positioning. It will provide the evidence base for a more detailed strategy and plan for improving the tourism product on the island.

We did a similar study, in less depth, in 2006[1].

This report is accompanied by spreadsheets containing lists of organisations / facilities involved in providing services to tourists. They are summarised in Sections 3 and 4. Section 2 has conclusions.

The brief for the study requested comparison with places that are competitors to Jersey. It is not easy to do this because there is nowhere that is directly comparable. The main focus of this work is on holiday tourism, as opposed to business tourism. Cornwall, Devon, North Yorkshire and Cumbria (i.e. the Lake District) are the top holiday tourism destinations in the UK. Cornwall is the leading UK destination in terms of holiday nights. That it is because its tourism is more orientated towards stays of a week or more than Cumbria and North Yorkshire, which are easier to get to and, therefore, more suited to short breaks.

Figure 1:Number of Holiday Trips and Holiday Nights



Source: Great Britain Tourism Survey, Average 2013-2015

A direct comparison of the tourism offer between Jersey and Cornwall, the Lake District or North Yorkshire would be misleading, however, because of difference in physical and market size. Jersey is about 45 square miles in size and has about 350,000 annual visits for holiday. Cornwall is 1,376 square miles and has about 2.8 million annual visits for holiday; the Lake District National Park is 912 square miles (with a large additional area outside the National Park that is commonly thought of as Lake District) and has about 2.8 million visits for holiday. Both also have many millions of day visits annually.

[1] Jersey Destination Audit, Towards a Jersey Tourism Development Strategy. Our team was called Locum Consulting at the time.

It is unsurprising, therefore, that both have a considerably greater number and range of tourist facilities than Jersey. Jersey will never, realistically, be able to match them in that respect.

We have instead made some comparisons with a section of Cornwall and a section of the Lake District. They are closer in physical size. It is important to remember, however, that Jersey is different from both in that it also has substantial corporate business tourism, largely generated by the financial services industry.

The former Penwith district in Cornwall[2] covers the toe of the county. It includes the popular resort town of St Ives. Penzance, population 21,000, is the largest town.

Figure 2: Penwith Region of Cornwall

South Lakeland district is orientated around Lake Windermere. The largest town is Kendal, with a population of 28,000.

Figure 3: South Lakeland District

The report also includes some examples from other places to illustrate what might be done in Jersey.

[2] Cornwall is now a unitary authority following local government reform.

2 CONCLUSIONS

It is not easy to assess the tourism "product" in any place because it is so all-encompassing. There are innumerable factors which shape the decisions of people to visit places and which determine the level of enjoyment they have. The weather, natural beauty and attractive, interesting towns offering a range of things to do and see, are typically major considerations. So too are factors like the nature, quality and price of accommodation and food and drink on offer, and the ease of getting there. Some elements of the economy – notably, transport services, travel and tour operators, accommodation providers and attraction operators – obtain a high proportion of their revenue from tourists and are normally thought of as being the tourist industry. Tourists are often an important part of the custom of other businesses such as shops, restaurants and events, and they may play an important role in attracting visitors, even though local people may be their main source of revenue.

Other dimensions that ultimately are critical to the amount and nature of tourism in an area include effectiveness of conservation of heritage, attractive public realm, and pristine natural environment. Tourism organisations seldom get involved much in matters like that, despite their importance to tourism, and there can be conflicts of priority. Desire to expand the accommodation base may, for example, be at the expense of natural beauty.

There is, in Jersey, the added complication of a limited supply of space for development and considerable competing demand for it, especially for housing. It makes sense, as far as possible, to align tourism development with other aspects of island life; to ensure, in other words, that enhancements that benefit tourism also have direct benefit to local people.

2.1 ACCESS

The methods by which people can get to the island will, obviously, have a critical impact on where tourists will come from. Jersey has good flight connections and reasonable ferry connections to the UK, but poor connections elsewhere. Many tourism stakeholders are likely[3] to take the view that route development is the most important priority for product development.

The current situation makes it inevitable that the UK will be the primary market for the foreseeable future. There is a summary of domestic holiday tourism in the UK in Appendix 1. That appendix also has a summary of holiday tourism in Cornwall, including results of a visitor survey, giving an idea of what visitors like to do there.

[3] And this was reflected in our consultations.

Some key points are: young families and empty nesters are the main markets; the visitor profile of people going to Cornwall is dominated by those who are “cosmopolitan” in disposition; and many people now take a combination of short breaks and longer holidays, with average length of stay in long term decline.

These factors are likely to be at play in Jersey, with an important qualification that, as a result of having little self-catering accommodation, the island is handicapped in attracting family holidays.

2.2 SERVICED ACCOMMODATION

The island has a strong hotel offer in terms of the quality on offer.

It has about the same number of rooms as South Lakeland, and three times more than Penwith, suggesting that it is not deficient in quantity. Its offer is certainly a match in terms of quality.

There is, arguably, more consistency in the quality of the offer than there was in the past. This has largely been because of loss of accommodation at the low end of the market, normally having been converted to residential. That is likely to continue, especially in St Helier, and is not necessarily a disadvantage to the island in the wider perspective.

Hotels on the island are particularly good in terms of provision of swimming pools although, of course, they are not able to offer the expansive outdoor pools that most resorts in warmer climates feature.

The island is notably good for its spa offer.

There is a summary of the way in which the UK hotel market has been evolving in Appendix 3. The island lacks branded hotel stock, even with arrival of Premier Inn. More of a mix between independents and brands would probably be optimal.

Jersey is not weaker than Cornwall and the Lake District in this respect (although South Lakeland has a selection of branded budget hotels), but they would also, arguably, benefit from more brands.

Many people take brands as being a measure of quality and the marketing systems which hotel brands have these days give them an advantage. Hotel brands seldom now own the properties which their name is on. They either manage the property on behalf of the owner under an operating agreement or lease, or the owner operates it under a franchise. There are some properties on the island that seem to be suited to being managed like that and might perform better as a result.

There might be a possibility of a upmarket branded hotel at Fort Regent. Current plans envisage a new build hotel on the site of the former swimming pool, but another possibility might be a hotel similar to Spanish paradors[4].

[4] The state owned chain of hotels in Spain, mainly converted from historic buildings

This would probably require subsidy towards the capital cost because of the costs involved in working with historic buildings, but the aim could be for it to be managed by an international brand.

Some might argue that more hotel brands would be at the expense of local character, but that is less likely to be the case for hotels, in our judgement, than, for example, retail.

2.3 SELF-CATERING ACCOMMODATION

There has been a long-term trend towards people choosing to self-cater for their holidays rather than use serviced accommodation like hotels and bed and breakfasts. Serviced accommodation remains the normal choice for short breaks, although Airbnb has altered that a little. Self-catering is a normal preference for longer holidays for many people.

Jersey has far less self-catering than South Lakeland and Penwith and its tourism offer is fundamentally different as a result. The underlying reason for this is that demand for houses for primary residence, as opposed to second homes, is higher in Jersey than Cornwall or Cumbria. Much of the self-catering in those places is in holiday centres, typically consisting of rows of static caravans. That is not likely to be a viable option on Jersey and there are advantages in that because holiday centres based on static caravans are not attractive features in the landscape.

There is a move towards up market versions of these holiday centres, of which Les Ormes resort is an example. There is a summary of this market in Appendix 5.2 and of the family tourism market more generally in Appendix 5.

Jersey Heritage Trust has a small portfolio of self-catering properties that are of the style of those run by the Landmark Trust and National Trust in Britain, which are popular. There could be potential to do that on a larger scale at Fort Regent and Elizabeth Castle.

2.4 WELLNESS

The spa offer in Jersey Hotels is excellent compared to other parts of the UK and, probably, comparable to top French and Spanish resort towns. Appendix 2 has a summary of trends in wellness tourism, which has been growing fast. Jersey lacks the advantage of natural hot water springs. It could, however, consider making “wellness”, in all its dimensions, a feature of the way the island is promoted and a focus of product development. That could include initiatives to add activities like beach yoga / massage. A strategy for this nature could have the advantage or

like monasteries and castles. A Portuguese version, pousadas, are now run by a private hotel company.

wrapping up a wide variety of initiatives and of being of as much benefit to locals as tourists.

Development of a high quality thalassotherapy[5] spa could be a signature project for this. It might be an option for Fort Regent.

Further developing the scope for road cycling, and promoting it as one of the main features of the island, seems to have particular potential in conjunction with promoting a wellness theme. Countries on the continent are much better at this than Britain, providing segregated cycle lanes in towns and between towns, traffic signals for cyclists and more comprehensive signage that includes distances to different places, which is especially useful for tourists. Holland, being flat and having a long tradition of mass cycling, is perhaps the exemplar.

Increasing the profile of the national park is also likely to be important in this respect. While it might be seen by some as hindering development of tourism amenities, a national park is a marker to visitors that a place is special and is treated as such. It is likely to be in the interests of the tourism industry if the national park achieves a high profile.

2.5 ATTRACTIONS

Jersey has a good range of attractions and entertainments, matching, in our opinion, anywhere that a tourist might go in the UK or in most countries abroad. They include icons like Jersey Zoo and Mont Orgueil Castle. Several new attractions have opened in the decade since our last audit. The market seems to be working without much problem.

While smaller attractions close in the off-season, understandably, there is a lot to see and do on the island all year round.

Beaches are a primary visitor attraction in a place like Jersey. Most of the island’s beaches have blue flags and facilities for tourists. They do not offer, however, the high-level services that are common at continental beaches, which often have beach clubs that provide a range of services, extending sometimes even to an outdoor swimming pool overlooking the beach. There is, in common with most beaches in Britain, and absence of changing facilities. A high proportion of the island’s hotels are in St Helier, where the beaches are not the most enticing for swimming or sun bathing. It might be worth investigating whether it is useful / possible to establish one or more truly excellent beach clubs and / or beach services facilities that can enhance the beach offer available to their customers.

One area where the island is, arguably, lacking is in visual arts. It is also, arguably, lacking in modern buildings of quality, the Boathouse in St Aubin being the only modern building that makes an impression in that respect.

[5] Therapy based on sea water.

A National Gallery has been long mooted, and examples like Turner Contemporary in Margate (see Appendix 7) and Tate St Ives show the positive impact they can have. Our judgement is that a gallery in a new building of high quality could make a substantial difference to Jersey, benefiting locals and tourists alike. They are very expensive, however, to build and operate. Turner Contemporary cost £19 million (in 2010-2) and has an annual subsidy of about £500,000. A cultural strategy for the island is being produced currently on behalf of the States. It will, we presume, consider this matter in detail.

Fort Regent is the most obvious site for a major attraction development in the medium term. Plans produced for the States by HOK show an external elevator from Snow Hill to improve access from the town centre. That approach is fairly common in historic hill towns on the continent[6] and seems sensible. It could make the Fort much more accessible to people staying in the cluster of hotels near the centre of St Helier.

The HOK study does not appear to have been undertaken to the depth that would be expected for a site of this complexity, with a wide range of options – with and without retention of the roof – assessed in some detail. It is possible that the best approach is to invite developers to come forward with proposals, but it would probably be advisable to have a clear development brief before doing so.

It is difficult to come up with a viable scheme for such a big site and the issues are too complex for us to say with confidence what the best solution might be. There seems to be the possibility, however, of a good quality events centre (preferably orientated near the elevator so that it is not too far from existing hotels), and a parador[7]-style hotel, including perhaps a self-catering dimension.

It would not necessarily be against tourism interests for development of the fort to include residential, assuming it is in keeping with the heritage. The main requirement from a tourism perspective is the Fort is an attractive and vibrant place with interesting things to see and do. The fortress towns of Gamlebyen, outside Fredrikstad in Norway, and Suomenlinna in Helsinki Harbour, are examples of walled forts that have been restored as places that are desirable to both live and visit. The presence of a local community, with shops and places to eat and drink, gives a vitality that is often lacking in military heritage sites.

Elizabeth Castle also has potential for Fredrikstad / Suomenlinna kind of treatment, and is also a significant opportunity.

[6] Coimbra in Portugal, Hondarribia in Spain, for example.

[7] The state owned chain of hotels in Spain, mainly converted from historic buildings like monasteries and castles. A Portuguese version, pousadas, are now run by a private hotel company.

2.6 EVENT SPACES

There is a large amount of space for conferences, exhibitions, weddings and other events in both hotels and other venues. There is a concentration of good quality space in 4-star + hotels in St Helier.

Tourism stakeholders have long argued for a conference centre, and there is certainly a case for that because of the large number of rooms at the high end of the market concentrated in St Helier. It would probably require subsidy however, both to capital on ongoing running costs.

Fort Regent or the waterfront seem to be most obvious locations.

2.7 EVENTS

Over sixty significant events take place on the island annually, headed by Jersey's distinctive version of Siena's Palio, the Flower Festival.

Food-orientated events are especially popular with the public these days. The most effective are where they have a theme that is related to local produce. Whitstable's Oyster Festival is an example. A festival themed to the Jersey Royal seems to be an obvious opportunity.

2.8 SPORTS

The population in Jersey has a high level of enthusiasm for sport and physical activity. There are many sports events on Jersey as a result.

Several people we talked to commented on the potential for Jersey to attract more teams and individuals for pre-season training.

2.9 RETAIL

The retail offer is moderate. The offer in St Helier is like that of a UK town, perhaps a little less in scale than normal but with a little extra character, largely as a result of the independent department stores and a greater proportion of independent shops rather than brands. There are some suggestions for improving it in the next section.

There are good destination craft-retail businesses elsewhere on the island, matching or exceeding that which we have experienced elsewhere.

It would be advantageous, from a tourism perspective, if shops opened on Sundays, but the situation is similar in other countries (Portugal, for example) and it is not likely to be a critical issue for most visitors. The exception might be day trippers from France. An aim of town centre regeneration should be to make it attractive to shops to open on Sundays.

2.10 TOWNSCAPE / PUBLIC REALM

Something that most tourists, ultimately, like is strolling around places that are pleasant, attractive and interesting. St Aubin and Gorey Harbour are especially popular for that reason.

We agree entirely with the sentiments in This Realm of Ours, a publication by Save Jersey's Heritage. We think that a worthwhile project for Visit Jersey to engage in would relate to how the public realm could be made more distinctly Jersey (as opposed to UK) and how it could be tidied up and, where possible, less cluttered.

Improving the townscape of St Helier would, in our judgement, be the single project that could most benefit both the tourism industry and the quality of life of local people. St Helier is moderately attractive as a town centre. It has a moderately substantial pedestrianised area, a fairly good selection of shops and places to eat and drink, and a reasonably good market.

It could be very much better, however. Holland is the exemplar in this respect in our experience and possibly the best place to look for inspiration.

Appendix 6 has photographs of the town of Amersfoort to illustrate what is possible. It is like St Helier in that has a thriving office sector, largely in modern office buildings on the edge of the historic central business district. It has managed to integrate that, while retaining a town centre of superb character. There is no tarmac at all in any part of the historic town centre. Every street in the central area is pedestrian priority and attractively paved. There are many places to eat and drink outdoors when the weather is nice. Historic buildings are maintained to a high standard. Modern buildings are integrated with the old in a sensitive manner. It is exceptionally cycle friendly.

The States realise that this is a priority. It is reflected strongly in the Jersey Plan.

The proposed Jersey Infrastructure Levy (JIL), while, not surprisingly, a concern to those who would pay it, seems like an opportunity to start bringing St Helier towards that level. Doing so in an effective manner would be to the ultimate benefit of developers by enhancing the value of development sites across St Helier.

The nature of townscape enhancements should reflect the character of each part of a town, and also the type of commercial offer that is present, and desired, in the town. The character of different parts of St Helier were examined in detail in a report commissioned by the States of Jersey Planning and Environment Department in 2005 called St Helier Urban Character Appraisal[8], and are refleced in the Jersey Plan.

The town would, in tourism terms, benefit most from a quarter where there is distinctive independent retail offer mixed with lots of places to eat and drink and a vibrant ambience.

[8] Willie Miller Urban Design, Drew Mackie Associates, Glasgow Conservation Trust West, yellow **book,** Malcolm Fraser Architects.

Margate is an example of a place that has achieved this through deliberate regeneration strategy in its Old Town.

The Central Market and Fish Market are attractive features of St Helier that are not now seen in most UK towns, although the Fish Market, especially, is tired. A substantial makeover of the markets as the centrepiece of establishing a defined zone for independent businesses in that part of the town could be a good project. There are illustrations of what can be done in Appendix 8.

The town is also lacking a section for designer brands of the ilk seen on Bond Street[9]. It is common now for regional cities to have a cluster of such brands either on a street or in a centre. It may not be viable but it would seem that, given the prosperity of the island, that it could be.

There is much pressure on housing in Holland as there is in Jersey. The Dutch are masters at integrating modern town houses and apartments in a manner that is in keeping with the historic built environment, providing desirable, well-built and spacious houses that are dense, without being high rise.

Doing so in St Helier would be to the advantage of islanders and tourism. It would give the town centre more vitality and make it more attractive to live in, work in and visit. This objective is, again, reflected in the Jersey Plan.

There is still potential to make a lot more of the St Helier waterfront in destination terms, looking at developments like Oslo's Aker Brygge for inspiration. The biggest opportunities for development over the long term will be at the waterfront, including La Collette. It would be advantageous if the results were better from a tourism dimension than they have been to date.

2.11 DEVELOPMENT FUNDING

We think there might be a case, when thinking about the future of the Tourism Development Fund, of introducing a scheme similar to the Heritage Lottery Fund's Heritage Enterprise programme in Britain. That provides grants to developers of historic buildings to cover the "conservation deficit" (i.e. the amount that makes the scheme unviable on a commercial basis because of the costs of restoring the historic building). The aim is to leverage private sector capital and to ensure that projects are sustainable, without unfair competition to existing businesses and distorting the market.

There may also be a case for a fund that provides grants towards improvements of historic façades and, in some cases, historic shop interiors.

Visit Wales currently has a programme called "Colourful Communities" which we think is a good idea. It provides funding for painting rows of buildings in vibrant colours, the colours having been selected by a design professional.

[9] Not, obviously, on the scale of Bond Street.

It could also be advantageous to have a fund that can provide grants for feasibility studies in circumstances where there are sensitive factors – such as heritage and natural environment - that need to be taken into account so that appropriate specialists are used.

There might also be an argument for amending the name of the fund so that it is clear to local people that it invests in projects which are as much to their direct benefit as to tourists.

2.12 JERSEY BRAND PROMISE

Our judgement is that, on the whole, the tourism product on the island matches the brand positioning which has been adopted by Visit Jersey and there is more consistency of quality than a decade ago. The experience in St Helier is the main weakness. Given that it is inevitable that most tourism-related developments will have to take place in St Helier (because there is little or no opportunity elsewhere given the priority to preserve the quality of the environment and because of competing demand from residential for any sites that do become available), fixing the town is, in our judgement, the top medium to long term priority in this respect.

2.13 SUMMARY

The following is a list of the ideas for product enhancement discussed above:

- A programme to encourage a more distinct Jersey identity, especially in signage.
- Making “wellness” a theme of product development and promotion.
- More self-catering accommodation, generally.
- Expansion of the airline route network.
- Improvement of the public realm in St Helier in combination with a more interesting retail offer and more places to dine outdoors.
    - A strategy to achieve a defined central area that is entirely pedestrian and cycle friendly.
    - Revitalisation of the Central Market to include a modern style food market, as the hub of an “independents” quarter.
    - A luxury retail zone.
- Regeneration of Fort Regent, perhaps to be a “fortress village” and / or parador-style visitor accommodation (hotel and / or self-catering), perhaps including events centre and / or thalassotherapy spa.
- Regeneration of Elizabeth Castle as a visitor-orientated fortress village.
- A national gallery of art, in a landmark modern building, that stages touring exhibitions, as part of making the waterfront more effective as a destination.
- One or more beach clubs.
- A conference centre.
- Enhancement of the profile of the national park.
- A version of Heritage Lottery Fund’s Heritage Enterprise fund.
- A version of the Visit Wales Colourful Communities project.

3 ACCOMMODATION

3.1 HOTELS

Jersey has just under 4,000 rooms in 70 properties. Three quarters of the stock is between 3 star and 4 / 5 star, evenly split between the two. 27% of the rooms are in 2-star properties. There are about 60 rooms per property on average, with the average size of properties that are 3* plus being considerably more than 2*.

Figure 4: Jersey hotel overview

	Properties		% with wet leisure	% with function facilities	Total bedrooms		Avg. rooms per property
	Number	%			Number	%	
2-star	30	43%	23%	3%	1,071	27%	36
3-star	18	26%	61%	22%	1,488	37%	83
4-star	20	29%	55%	70%	1,273	32%	64
5-star	2	3%	100%	100%	153	4%	77
Total	70		44%	30%	3,985		57

There appears to have been a large reduction in the amount of 2* and 3* stock since the audit we did a decade ago. There were 1,760 2* rooms then, making a reduction of 28%; there were 1,942 3* rooms, making a reduction of 25%. Much of the change in 3* was a result of hotels like the Royal Yacht and the Pomme d'Or moving to 4*.

21 hotels in Jersey have wet leisure facilities (i.e. swimming pool and related facilities, including spa in many instances). The whole of Cornwall has about 30[10].

Penwith has only a quarter of the number of hotel rooms as Jersey, with a much greater bias towards 3*.

Figure 5: Penwith hotel overview

	Properties		% with wet leisure	% with funtion facilities	Bedrooms		Avg. Rooms Per Property
	Number	%			Number	%	
2-star	10	19%	0%	4%	142	13%	14
3-star	34	63%	9%	24%	772	70%	23
4-star	10	19%	30%	4%	185	17%	19
5-star	0	0%	NA	0%	0	0%	0
Total	54		13%	31%	1,099		20.4

Cornwall as a whole has 68 hotels of 3*+, with 3,700 rooms.

South Lakeland has almost the same number of hotel rooms as Jersey, although many more properties, the average size being considerably smaller. It now has very little at the bottom end of the market. A far lower proportion of properties have wet leisure facilities than in Jersey.

[10] Source: Colliers research for Millendreath resort project.

Figure 6: South Lakeland hotel overview

	Properties		% with wet leisure	% with funtion facilities	Bedrooms		Avg. Rooms Per Property
	Number	%			Number	%	
Budget	4	2%	0%	0%	219	5%	55
2-star	26	14%	0%	1%	261	7%	10
3-star	104	56%	14%	13%	2,018	50%	19
4-star	51	27%	29%	12%	1,425	36%	28
5-star	6	3%	0%	1%	75	2%	13
Total	187		16%	30%	3,998		21.4

Figure 7, Figure 8 and Figure 9 list 2*, 3* & 4 / 5 * hotels and map them.

Figure 7: Jersey 2 Star Hotels

Hotel	Location	Hotel	Location
Dolphin Hotel	Gorey	Marina Metro Hotel	St Helier
Maison Gorey Hotel	Gorey	Mornington Hotel	St Helier
Moorings Hotel	Gorey	Mountview Hotel	St Helier
Old Bank House Hotel	Gorey	Norfolk Hotel	St Helier
Seascale Hotel & Restaurant	Gorey	Runnymede Court Hotel	St Helier
Biarritz Hotel	St Brelade	Sarum Hotel	St Helier
Highlands Hotel	St Brelade	Stafford Hotel	St Helier
Hotel Miramar	St Brelade	Thalatta Guest House	St Helier
Ocean Walk	St Brelade	Villa Nova	St Helier
Alhambra Hotel	St Helier	Westhill Country Hotel	St Helier
De L'Etang	St Helier	Millbrook House	St Lawrence
Fairholme Guest House	St Helier	Maison Des Landes	St Ouen
Havelock Guest House	St Helier	Seawold Guest House	St Peter
Hotel de Normandie	St Helier	Talana Hotel	St Saviour
Hotel Sandranne	St Helier	Oaklands Lodge Hotel	Trinity

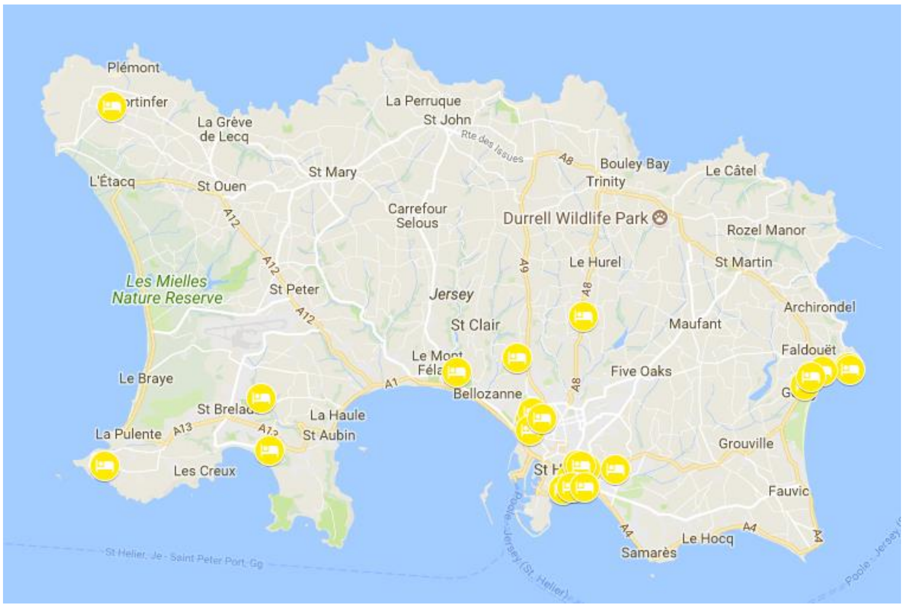


Figure 8: Jersey 3 Star Hotels

Hotel	Location
Beachcombers Hotel	Grouville
Beausite Hotel	Grouville
Bon Viveur	St Aubin
Beau Rivage Hotel	St Brelade
Windmills Hotel	St Brelade
Hotel Ambassadeur	St Clements
Pontac House Hotel & Restaurant	St Clements
Apollo Hotel	St Helier
Best Western Royal Hotel	St Helier
Fort D'Auvergne	St Helier
Hampshire Hotel	St Helier
Inn Jersey	St Helier
Mayfair Hotel	St Helier
Monterey Hotel	St Helier
Norfolk Lodge	St Helier
Ommaroo Hotel	St Helier
Revere Hotel	St Helier
Merton Hotel	St Saviour

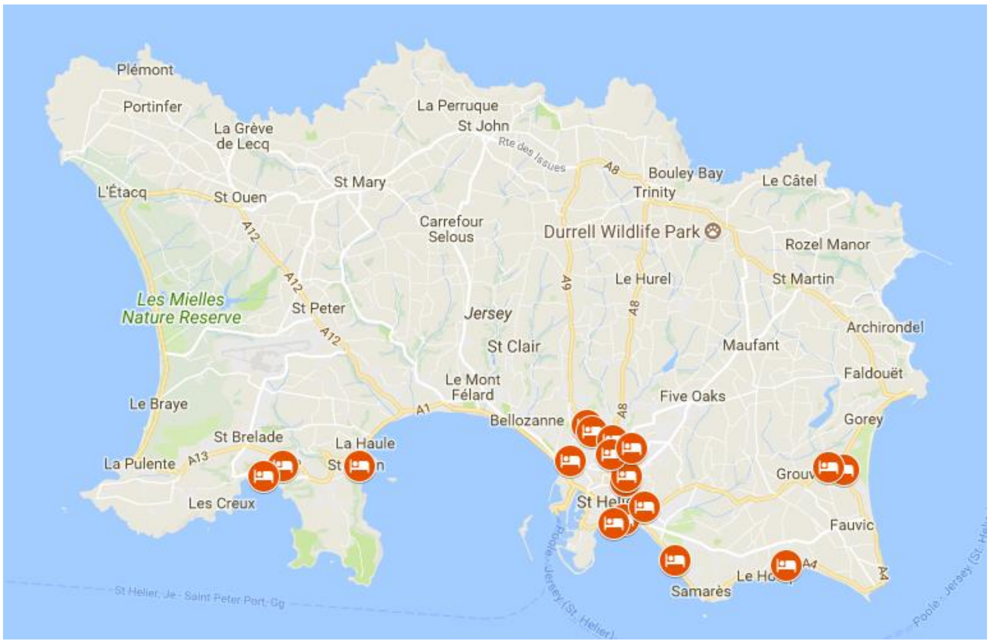


Figure 9: Jersey 4/5 Star Hotels

Hotel	Location
Harbour View Guest House	St Aubin
Hotel Cristina	St Aubin
Hotel La Place	St Aubin
La Haule Manor	St Aubin
Old Court House	St Aubin
Somerville Hotel	St Aubin
Atlantic Hotel	St Brelade
Golden Sands Hotel	St Brelade
L'Horizon Hotel & Spa	St Brelade
St Brelade's Bay Hotel	St Brelade
Club Hotel & Spa	St Helier
Pomme D'Or	St Helier
Radisson Blu Waterfront	St Helier
Royal Yacht Hotel	St Helier
Savoy Jersey	St Helier
Chateau La Chaire	St Martin
Prince of Wales Hotel	St Ouen
Greenhills Country House Hotel	St Peter
Hotel de France	St Saviour
La Place Hotel	St. Brelade
Grand Jersey Hotel & Spa	St Helier
Longueville Manor	St Saviour

The 20 largest hotels by number of rooms (30% of properties) account for 60% of rooms and are listed in Figure 10. All but four have swimming pools.

Figure 10: Top 20 hotels by number of rooms

Property	Rooms	Stars	Leisure
Merton Hotel	302	3-star	Wet
Mayfair Hotel	233	3-star	Wet
Radisson Blu Waterfront	195	4-star	Wet
Pomme D'Or	143	4-star	None
Hotel de France	126	4-star	Wet
Grand Jersey Hotel & Spa	123	5-star	Wet
Royal Yacht Hotel	110	4-star	Wet
L'Horizon Hotel & Spa	106	4-star	Wet
Hotel de Normandie	105	2-star	Wet
Norfolk Lodge	101	3-star	Wet
Norfolk Hotel	100	2-star	Wet
Westhill Country Hotel	90	2-star	Wet
Best Western Royal Hotel	89	3-star	None
Hotel Ambassadeur	89	3-star	Wet
Apollo Hotel	85	3-star	Wet
Ommaroo Hotel	82	3-star	None
Beausite Hotel	76	3-star	Wet
St Brelade's Bay Hotel	74	4-star	Wet
Monterey Hotel	73	3-star	Wet
Stafford Hotel	72	2-star	None
Fort D'Auvergne	65	3-star	Wet

There is still a substantial number of 2* hotels. Most are small, but three (Hotel de Normandie, Norfolk Hotel and Westhill Country Hotel) are of c.100 rooms each.

The Radisson Blu and, arguably, Best Western Royal (Best Western is a marketing consortium) are the only hotels on the island operating under international brands, although they are to be joined shortly by a Premier Inn in St Helier.

The 4-5* segment includes numerous hotels of a very high standard, with excellent health and fitness, spas and restaurants. Four hotels – the Grand Jersey, Longueville Manor, L'Horizon and Atlantic offer top end luxury. These hotels straddle the traditional luxury and the boutique sectors. The Atlantic and Longueville Manor feature in the Good Hotel Guide to Great Britain and Ireland[11], with the Club shortlisted. There are five properties in the guide in Penwith and ten in South Lakeland.

The spas at the Hotel de France, the Grand Jersey, the Club, L'Horizon, and also Spa Sirène, are featured in the Good Spa Guide. That is five in total, compared to one in South Lakeland (2 in the Lake District in total) and one in Penwith (4 in Cornwall in total).

[11] Which is rare in being entirely independent. It covers properties of all price ranges.

Maison des Landes Hotel is a charitable trust, set-up by the Lions Club of Jersey, to provide holidays in Jersey specifically for people with a disability along with their family, friends and carers. Although it is difficult to make an assessment of overall suitability for disabled people, Jersey has a high proportion of hotel stock that has been built or refurbished in recent times and is likely to be relatively good in terms of access. This is likely to be less the case with older properties at 3 star and less.

Figure 11 shows hotel development schemes listed by AM:PM

Figure 11: Jersey pipeline hotel development schemes

Hotel Name	Grade	Bedrooms	Opening date / Planning Status
Cheffins at The Beaumont	4-star	6	Due 31-Dec-17
Hotel La Place (extension)	4-star	3	Awaiting Planning
Premier Inn St Helier	Budget	91	Due 30-Apr-18
Total		100	

Source: AM:PM

The database lists a considerably greater pipeline in South Lakeland and Penwith.

Figure 12: South Lakeland pipeline hotel development schemes

Hotel Name	Grade	Bedrooms	Opening Date / Planning Status
Best Western Ambleside Salutation Hotel (extension 1)	3-star	12	Full 2014
Best Western Ambleside Salutation Hotel (extension 2)	3-star	6	Full 2017
Premier Inn Ambleside	Budget	88	Pre-planning
Regent Hotel (extension)	3-star	4	Full 2017
Damson Dene Hotel (extension)	3-star	18	Full 2015
Cuckoo Brow Inn (extension)	3-star	4	Awaiting Planning
Grange Hotel (extension)	4-star	1	Full 2016
Bankfield Hall	3-star	84	Awaiting Planning
Rusland Pool Hotel (extension)	3-star	6	Full 2015
Romneys	3-star	6	Full 2015
Three Shires Hostel	Hostel	5	Full 2015
Swan Hotel & Spa (extension)	4-star	3	Full 2015
Premier Inn Ulverston	Budget	79	Due 31-Mar-18
Punch Bowl Inn	3-star	8	Full 2015
Angel Inn (extension)	3-star	1	Full 2014
Best Western Burnside Hotel (extension)	3-star	14	Awaiting Planning
Linthwaite House Hotel (extension)	4-star	6	Full 2017
Low Wood Bay Resort (extension)	4-star	38	Due 31-Oct-17
Macdonald Old England Hotel & Spa (extension)	4-star	6	Full 2017
Total		387	

Source: AM:PM

Figure 13: Penwith pipeline hotel development schemes

Hotel Name	Grade	Bedrooms	Opening Date / Planning Status
Premier Inn Penzance	Budget	61	Full 2016
Travelodge Penzance	Budget	70	Pre-planning
Chy An Gwyns	Hostel	5	Full 2015
Land's End Hotel (extension)	3-star	4	Full 2017
Tregenna Castle Resort (extension 3)	3-star	21	Awaiting Planning
Tregenna Castle Resort (extension 1)	3-star	2	Full 2017
Tregenna Castle Resort (extension 2)	3-star	1	Full 2017
Cornwallis Aparthotel	Apts	39	Full 2016
Treloyhan Manor Hotel (extension)	3-star	7	Full 2015
Total		763	

Source: AM:PM

Jersey's top ranked hotels on Trip Advisor have an average rating slightly higher than both South Lakeland and Penwith.

Figure 14: Trips Advisor ratings and awards of top listed hotels

Location	Avg. Trip Advisor Rating of top 10 Hotels	Avg. Number of Reviews per Hotel	Awards
Jersey	4.85	737	10 x Certificate of Excellence 3 x 2017 Travellers' Choice Award
South Lakeland	4.80	1014	10 x Certificate of Excellence 5 x 2017 Travellers' Choice Award 2 x GreenLeaders Gold Level
Penwith	4.45	722	10 x Certificate of Excellence 1 x 2017 Travellers' Choice Award

3.2 OTHER SERVICED

There are about 400 additional rooms in registered bed and breakfasts and guest houses, more than half of which are ungraded. Only a few are operating at the top end of the market.

Figure 15: Registered Guest Houses

	Properties		Bedrooms		Rooms per property
	Number	%	Number	%	
No Grade	20	57%	201	51%	10
Two Star	2	6%	22	6%	11
Three Star	5	14%	78	20%	16
Four Star	3	9%	29	7%	10
Four Star (Silver)	2	6%	28	7%	14
Five Star	1	3%	10	3%	10
Five Star (Gold)	1	3%	16	4%	16
Five Star (Yellow)	1	3%	14	4%	14
Totals	35	100%	398	100%	11

Most are in St Helier and St Brelade.

Figure 16: Location of registered guest houses

Location	Number	%
St Helier	18	53%
St Brelade	11	32%
Other	5	15%
Total	34	100%

80% of the guest houses in St Helier are ungraded. That represents 75% of all the ungraded properties. They are more likely to be providing accommodation for workers rather than tourists.

3.3 HOSTELS

There are just two hostels on Jersey, the Jersey Accommodation & Activity Centre and the Durrell Wildlife Hostel.

The Activity Centre mainly hosts school groups, largely from France, visiting as part of an adventure holiday, and visiting sports teams. It has 23 rooms and can accommodate 110 people.

Durrell Wildlife Hostel, within Jersey Zoo, is a traditional farm house with 10 bedrooms accommodating 36.

3.4 NON-SERVICED

There are 338 units in 39 registered properties for holiday rental on the island. Most are apartments and most are not graded.

Figure 17: Registered non-serviced accommodation

	Properties		Units		Guest Capacity	Units per property	Guests per unit
	Number	%	Number	%			
Non-Graded	32	82%	198	59%	643	6	3
Four Star	3	8%	40	12%	120	13	3
Five Star	3	8%	90	27%	388	30	4
Five Star (Gold)	1	3%	10	3%	42	10	4
Totals	39	100%	338	100%	1,193	9	4

A third of the units are split between Liberty Wharf apartments and Les Ormes Resort. 11 properties (28% of the total) that have 10 or more units account for 80% of all units.

Figure 18: Registered non-serviced accommodation

Property	Units	Location
Liberty Wharf Apartments	63	St. Helier
Les Ormes Resort	68	St. Brelade
Merton Suites	28	St. Saviour
Saco Apartments	24	St. Helier
La Rocco Apartments	22	St. Brelade
Panama House Apartments	14	St. Helier
La Place Country Cottages	12	St. Brelade
Uplands Apartments	12	St. Helier
Discovery Bay	11	St. Peter
Amani Luxury Self Catering	10	St. Brelade
Porthole Suites	10	St. Brelade

Almost half of properties are 1 bed, designed to accommodate 2-3 people. The rest are primarily 2 bed. A relatively small number of units are suitable for larger families or multiple households.

Figure 19: Size of Units

	Units	%
2 / 3 Person	160	47%
4 / 5 Person	137	41%
6 Person +	41	12%
Total	338	100%

Figure 21 shows that 55 whole properties are listed on Airbnb, only 21 being self-contained houses as opposed to apartments. 102 rooms are available in homes.

Figure 20 also shows the number of properties that are listed on Holiday Lettings, a main portal for holiday villas and Hoseasons, which is the main portal for marketing of holiday parks, comparing Jersey with South Lakeland and Penwith.

Figure 20: Non-serviced accommodation listed in South Lakeland and Penwith

	AirBnb		Holiday Lettings.co.uk	Hoseasons	
	Entire Properties	Individual Rooms	Properties	Cottages	Holiday Parks
Jersey	55	47	91	NA	NA
South Lakeland	518	245	612	89	8
Penwith	467	301	852	114	2

Figure 21: Properties listed on Airbnb

	Properties		Rooms		Capacity	
	Number	%	Number	%	Number	%
Whole Properties						
Studio	5	9%	5	5%	10	5%
Apartment	27	49%	38	37%	84	38%
Bungalow	3	5%	8	8%	16	7%
Cottage	4	7%	4	4%	14	6%
House	14	25%	46	45%	92	42%
Lodge	1	2%	1	1%	2	1%
Barn	1	2%	1	1%	2	1%
Total	***55***	100%	***103***	100%	***220***	100%
Individual rooms						
House	39	38%	44	28%	89	27%
Apartment	3	3%	3	2%	6	2%
Guest Suite	1	1%	2	1%	4	1%
House (Studio)	3	3%	3	2%	7	2%
B&B	1	1%	3	2%	4	1%
Total	***102***	100%	***158***	100%	***330***	100%
Total Airbnb	**157**		**261**		**550**	

4 ACTIVITIES

4.1 ATTRACTIONS

This section lists attractions in different categories in Jersey, Penwith and South Lakeland. The database has additional detail of what is on offer at each Jersey attraction and of prices. Visitor numbers for attractions in Penwith and South Lakeland are quoted where they are made public in Visit England's annual survey of visits to visitor attractions.

4.1.1 ENTERTAINMENT

The 10-screen Cineworld at St Helier offers a range of cinema that is more than what is on offer in Penwith and South Lakeland, although they do have small independent cinemas. All three areas have a small selection of additional places focused on light entertainment.

Figure 22: Entertainment-Oriented Attractions, Jersey

Attraction	Seasonal?	Adult Admission
Cineworld	N	£10.60
MFA Bowl Jersey	N	£5.50
Tamba Arcade	N	£15 (20 Tokens)

Figure 23: Entertainment-Oriented Attractions, South Lakeland and Penwith

Attraction	Seasonal?	Adult Admission
South Lakeland		
Cliffhanger Rooms	N	£16-25
Roxy Cinema	N	£6
Royalty Cinema	N	£7.50
Brewery Arts Centre Cinema	N	£8.50
Penwith		
Eureka Escape Cornwall	N	From £20
Cornwall's Great Escape Rooms	N	£60/game
Savoy Cinema	N	£7
Newlyn Filmhouse	N	£8.50
Royal Cinema	N	£6

4.1.2 FAMILY ORIENTATED

Jersey offers many things for families to do, including a relatively new indoor splash pool and facilities at Creepy Valley and Les Ormes Resort.

Figure 24: Family-orientated attractions, Jersey

Attraction	Seasonal?	Adult Admission
aMaizin! Adventure Park	N	£10.50
Valley Adventure Centre	N	By activity
Tamba Park	N	£3.95
Aquasplash - Leisure Pool (Flumes)	N	£7.00
Les Ormes Resort Fun Zone	Y	
Les Ormes Resort Indoor Zorbing	N	£10.00
Fort Adventures - Playzone. Fort Regent.	N	
Jersey Zoo	N	£16.00
FunZone Activity Centre	Y	Variable
Rocco's Crazy Golf and Mini Golf	N	£12.50
Jersey Escape Tunnel (at Jersey War Tunnels)	Y	£15.00

It offers more in this respect than Penwith, although people staying in Penwith can go to other parts of Cornwall where they will find attractions of this nature. The offer is similar in scale to what South Lakeland has.

Figure 25: Family-oriented attractions, South Lakeland and Penwith

Attraction	Seasonal?	Adult Admission	Visits '16
South Lakeland			
Go Ape! Grizedale	Y	£33	42,042
Cocoa Bean Workshop & Shop	N	£15 (child)	
Lakes Aquarium	N	£5.95	
Old Hall Farm	Y	£8.25	
Lakeland Miniature Village	Y	£4	
Steam Yacht Gondola	Y	from £11	
The World of Beatrix Potter	N	£7.50	
Treetop Trek & Treetop Nets	N	From £18	
Lakeland Maze Farm Park	Y	£7.95	
Penwith			
Lands End	N	Free	

4.1.3 GARDENS AND PARKS

There is a good selection of gardens, similar in scale to the other two areas.

Figure 26: Gardens regularly open to the public, Jersey

Attraction	Seasonal?	Adult Admission
Botanic Gardens at Samares Manor	Y	£9.50
The Orchid Foundation	N	£5.00
Judith Queree's Garden	Y	£7.00

Five gardens are featured in the Good Garden Guide: Domaine Des Vaux, Durrell, Eric Young Orchid Foundation, Samares and Les Veux. The Guide states that the Orchid Foundation has one of the finest collections in the world.

Figure 27: Gardens, South Lakeland

Attraction	Seasonal?	Adult Admission	Visits '16
South Lakeland			
Holehird Gardens	N	£4.00	
Stagshaw Garden	N	NA	
Rydal Mount and Gardens	Y	£7.50	
Sizergh Estate and Gardens	Y	£10.50	
Penwith			
Trengwainton Garden	Y	£8.10	62,480
Chygurno Gardens	N	Free	
Tremenheere Sculpture Gardens	N	£8	

4.1.4 HERITAGE

The island also has a good selection of heritage attractions although, arguably, it is oriented to military heritage and has less diversity than a place like South Lakeland. Not many people are likely to notice this, however, and there is not much that could be done about it.

Figure 28: Heritage Attractions, Jersey

Attraction	Seasonal?	Adult Admission
Elizabeth Castle	Y	£11.25 £13.95 (inc ferry)
Mont Orgueil Castle	Y	£12.20
Greve de Lecq Barracks	Y	£2.00
Le Moulin de Quetivel	Y	£3.00
Le Moulin de Tesson	Y	Free
The Elms	N	Free
Morel Farm	N	Free
Jersey War Tunnels	Y	£12.00

Figure 29: Heritage Attractions, South Lakeland and Penwith

Attraction	Seasonal?	Adult Admission	Visits '16
South Lakeland			
Stott Park Bobbin Mill	Y	£7.60	10,394
Conishead Priory & Budhist Temple	N	Free	
Holker Hall & Gardens	Y	£12.50	
Lakeside & Haverthwaite Railway	Y	from £6.80	
Brantwood	N	£7.70	
Levens Hall & Gardens	Y	£13.50	
Furness Abbey	N	£5.40	
Swarthmoor Hall	N	£6	
Penwith			
Chysauster Ancient Village	Y	£4.60	12,234
Geevor Tin Mine	N	£13.95	42,015
St Michael's Mount	Y	£14	339,880
The Levant Mine and Beam Engine	Y	£7.70	31,016

4.1.5 MUSEUMS

The range of museums is like that at South Lakeland and more than Penwith. Pricing is similar. There seems to be a slightly higher propensity for museums to close in the winter, but it relates to small museums and is understandable.

Figure 30: Museums, Jersey

Attraction	Seasonal?	Adult Admission
Jersey Museum & Art Gallery	N	£9.95
Le Hougue Bie Museum	Y	£8.95
Maritime Museum & Occupation Tapestry	N	£9.80
Hamptonne Country Life Museum	Y	£8.70
Jersey Archive	N	Free
Channel Islands Military Museum	Y	£3.00
16 New St - Georgian House Museum	Y	£6.00
Pallot Steam, Motor & General Museum	Y	£6.50
The Mansell Collection	N	£10.00

Figure 31: Museums, South Lakeland and Penwith

Attraction	Seasonal?	Adult Admission	Visits '16
South Lakeland			
Lakeland Motor Museum at Backbarrow	N	£8.50	
Dove Cottages & The Wordsworth Museum	N	£8.95	38,872
Museum of Lakeland Life and Indusrty	N	£5.00	
Quaker Tapestry Museum	Y	£7.00	
The Armitt Museum Gallery Library	N	£5.00	
Kendal Museum	N	£2.00	
Ruskin Museum: The Story of Coniston	N	£6.00	
Laurel and Hardy Museum	N	£5.00	
Penwith			
Barbara Hepworth Museum	N	£6.60	
Telegraph Museum Porthcurno	N	£8.95	

4.1.1 VISUAL ARTS

The island has a selection of commercial galleries: The Link Gallery (St Helier), The Harbour Gallery (St Aubin), CCA Galleries (St Helier), Studio Eighteen (St Helier). There are exhibitions at the Jersey Arts Centre. Classical art is displayed at the Jersey Museum and Art Gallery. There have been proposals in the past for a National Gallery located at St Helier waterfront.

Figure 32: Art Galleries, Jersey

Attraction	Seasonal?	Adult Admission
The Link Gallery	N	Free
The Harbour Gallery	N	Free
CCA Galleries	N	Free
Studio Eighteen	N	Free
Jersey Arts Centre	N	Free

St Ives in Penwith has a heritage as an artist's colony, and is home to a branch of the Tate. The large number of galleries in the area is likely to be a factor of both. Tate St Ives has been a major success in attracting affluent tourists to the area and has just reopened after a substantial expansion.

Figure 33: Art Galleries, South Lakeland and Penwith

Attraction	Seasonal?	Adult Admission	Visits '16
South Lakeland			
Abbot Hall Art Gallery & MOLLI	N	£7.70	
Blackwell, The Arts & Crafts House	N	£8.80	
Brewery Arts Centre, Theatre			
The Heaton Cooper Studio, Gallery & Art Shop	N	Free	
Penwith			
Penlee House Gallery & Museum	N	£5	32,185
Tate St Ives	N	£7.50	51,403
Ledgerwood-Walker Newlyn Studio	N	Free	
Newlyn Gallery	N	£2.20	
Jeremy Sanders Studio	N	Free	
The Exchange	N	£2.20	
Penwith Gallery	N	Free	
Art Space Gallery	N	Free	
Minack Theatre	Y	£5	
The Jackson Foundation Gallery	Y	Free	

4.1.2 TOURS

Jersey provides a good range of tours of different type.

Figure 34: Tours of Jersey for Visitors

Attraction	Seasonal?	Adult Admission
History Alive! / Jersey Military Tours (7 x tours)	Y	Half day £25 Full day £43
Jersey Bus Tours Bus Tours Boat Trip Cycle Hire	Y	 £11.50-£20.00 £20.00 £16/day
Tantivy Blue Coach Tours	Y	£15-£20
Waverley Tours (3 x tours + shuttle services)	Y	£12-£20
Limo Bikes - motor bike tours	N	Variable

The table below probably misses various tours on offer at both South Lakeland and Penwith. Provision is likely to be of similar order to Jersey.

Figure 35: Tours in South Lakeland and Penwith

Attraction	Seasonal?	Adult Admission
South Lakeland		
Lakeland Segways & The Activity Hub	N	From £40
Mountail Goat Day Tours	N	From £25
Penwith		
Mermaid Pleasure Trips	N	From £15

4.1.3 OTHER ATTRACTIONS

Figure 36: Other Attractions, Jersey

Attraction	Seasonal?	Adult Admission
Jersey Lavender Farm	Y	£5.70
La Mare Wine Estate	Y	£9.95
Jersey Pearl	N	Free
Jersey Turbot - Farm Tours	Y	NA

Figure 37: Other Attractions, South Lakeland and Penwith

Attraction	Seasonal?	Adult Admission	Visits '16
South Lakeland			
Kankku Off Road Driving Adventures	N	From £40	
Honister Slate Mine	N	from £35	
Lakeland Climbing Centre	N	£10.50	
Predator Experience	N	from £45	
Penwith			
Polgoon Vineyard and Cider Orchard	N	£10.00	

There are also numerous other landmarks/places of interest that tourists see.

Figure 38: Other Places of Interest, Jersey

Heritage	**Woodlands/parks**
Grosnez Castle (ruin)	St Catherine's Woods
The Sand Dunes	Coronation Park
Corbiere Lighthouse	Howard Davis Park
The Dolmens	Val de la Mare Arboretum
St. Catherine's Breakwater	Jersey Wetland Centre
Les Minquiers / Ecrehous	Queen's Valley and Val de la Mare Reservoirs
Samarés Manor	Sir Winston Churchill Park
Churches	Jersey National Park
St. Brelade's Church	Les Mielles Nature Reserve
St. Saviours Church	St. Peter's Valley Woods
St. Helier Church	Waterworks Valley
St. Matthews Glass Church	

4.2 BEACHES

Jersey has 16 beaches, all but two of which have a blue flag for cleanliness and maintenance (Figure 40). All but three have toilets and most have at least a café. None, however, have the type of beach clubs that are common in continental resorts that provide chairs, towels, changing facilities, food and drink and massage.

There is a particular problem of sea lettuce next to St Brelade's beach.

4.3 EVENT SPACES

Hotels provide the main spaces for events like conferences, weddings and banquets, with the most substantial facilities being in 4 star+ hotels in St Helier.

Figure 39: Event Capacity in Jersey Hotels

Hotel	Rooms	Max. Cap.	Total Cap.	Location
Pomme D'Or	12	270	1,086	St. Helier
Radisson Blu Waterfront	8	400	635	St. Helier
Hotel de France	10	250	558	St. Saviour
Best Western Royal	4	300	435	St. Helier
Royal Yacht	6	280	397	St. Helier
L'Horizon	3	300	364	St. Brelade
Grand Jersey	7	170	350	St. Helier
Ommaroo Hotel	3	160	280	St. Helier
Hotel La Place	4	100	240	St. Aubin
Hotel Ambassadeur	1	170	170	St. Clements
Club	2	80	160	St. Helier
Longueville Manor	3	60	160	St. Saviour
Atlantic	2	80	120	St. Brelade
Somerville	4	55	115	St. Aubin
Revere	1	100	100	St. Helier
St Brelade's Bay	1	90	90	St. Brelade
Prince of Wales	1	80	80	St. Ouen
Old Court House	1	50	50	St. Aubin
Moorings	2	25	47	Gorey
Greenhills	1	35	35	St. Peter
Chateau La Chaire	1	20	20	St. Martin

There is also, as Figure 41 shows, a wide selection of non-hotel venues of different character which host events, the largest of which are in Fort Regent.

Figure 40: Jersey's beaches

Beach	Blue Flag	Lifeguard	Type	Parking	Toilets	Refreshments	Restaurant / café overlooking beach	Other
Anne Port	N	N	Shingle	Y	N	N		
Archirondel	Y	N	Shingle	Y	Y	Café/restaurant		
Beauport	Y	N	Sand	Y	Y	N		
Bonne Nuit	Y	N	Harbour / sand	Y	Y	Café/restaurant		
Bouley Bay	Y	N	Sand	Y	Y	Café and bar	Black Dog Bar	Dive Centre
Green Island	Y	N	Sand	Y	Y	Café/restaurant	Green Island Restaurant & Beach Hut	Slipway
Grève de Lecq	Y	Y	Sand	Y	Y	Café/restaurant	Coleen's Café, Seaside Café	
Grouville Bay / Long Beach	Y	N	Sand	Y	Y	Café/restaurant		
Havre des Pas	Y	N	Sand	Y	Y	Café/restaurant	The Lido Bar	Lido pool
La Rocque Harbour	N	N	Harbour / sand	Y	Y	Café		
Plemont	Y	Y	Sand / rock	Y	N	Café		
Portelet Bay	Y	N	Harbour / rocks	N	N	Café	Portelet Bay Café	
Rozel Bay	Y	N	Harbour / sand	Y	Y	Café/restaurants in town		
St Brelade's Bay	Y	Y	Sand	Y	Y	Various	Oyster Box, Big Vern's Diner, Watersplash Beach Bar & Diner, The Line Up, El Tico, Le Braye Café, Manos Bistro	Adventure Sports
St Ouen's Bay	Y	Y	Sand	Y	Y	Various		
Victoria Pool	Y	Y	Sand	Y	Y	Café	La Fregate Café	Tidal Marine pool

Figure 41: Jersey Non-Hotel Event Spaces

Venue	Spaces	Capacity
FORT REGENT	5	
Gloucester Hall		2,000
Queens Hall		1,500
Don Theatre		130
Hunfrey Room		75
Vauban Room		50
JERSEY OPERA HOUSE	7	
Auditorium		625
OH! Cafébar		70
The Studio		95
Dress Circle (bar)		70
Upper Bar		100
Berni Suite		45
Stalls Bar		60
LA MARE VINEYARD	5	
The Winery		220
Summer Marquee		60
Vineyard Bistro		50
Garden Room		20
ROYAL JERSEY SHOWGROUND	3	10,000
Exhibition Hall		1,000
Members Room		100
Council Room		18
SPRINGFIELD STADIUM	2	7,000
Blue Room		
Members Room		

Venue	Spaces	Capacity
VICTORIA COLLEGE		
Great Hall		380
Howard Hall		130
Bistro		230
De Quetteville Library		
Classrooms		
ELIZABETH CASTLE		
Wedding Ceremonies		150
Governor's House		100
MONT ORGUEIL CASTLE		
Wedding Ceremonies		130
Venue Spaces		200
The Lido	4	1,000
MFA Bowl	4	200
The Star Room	1	200
Les Mielles Country Club		600
Jersey Arts Centre	6	250
Maritime Museum	2	250
La Hougue Bie (marquee)	1	200
Jersey Museum	4	250
Jersey Archive	1	60
Hamptonne Museum	3	200
Le Câtel Fort	NA	25
Le Don Hilton	NA	15

4.4 PERFORMING ARTS

Jersey Opera House is the main venue for touring shows, although Fort Regent hosts concerts, especially, by pop groups and comedians that can attract larger audiences. The Opera House dates from 1900, although it was considerably rebuilt in 1921 following a fire. It has been owned by the States of Jersey since 1995. It was reopened after comprehensive refurbishment in 2000. The main auditorium has 625 seats. It has an extensive programme of commercial touring productions, with focus on light entertainment, especially popular music, comedy and musicals.

The Jersey Arts Centre has an auditorium seating 250 and is the main venue for locally produced theatre.

4.5 EVENTS

Events Jersey has over 60 events of different type. Figure 42 and Figure 43 show non-sporting and sports-orientated events.

Figure 42: Non-Sporting Events

Month	Event
ACTIVITY-ORIENTATED EVENTS	
May	Barclays Jersey Boat Show
Jun	The Jersey International Motoring Festival
Jun	Good Vibrations - 80's Surf Festival
Jun	State Street Around Island Walk
Aug	St Lawrence Charity Horse Show
CULTURE & ENTERTAINMENT ORIENTATED EVENTS AND FESTIVALS	
Mar	The Deutsche Bank Festival of Creative Arts 2017
Mar	Jersey Music Service Spring Concert
May	Liberation International Music Festival
May	Liberation Day
May	Viva Italia
May	Mass Festival
May	Sunshine – A Little Music Festival
Jun	Sunset Concert at Mount Grantez
July	The Jersey-France Festival
July	Legend in the Park
July	Big Gig in the Park
Aug	Reasons to be Cheersful - Music and Arts Festival
Aug	Jersey Film Festival
Aug	Battle of Flowers Carnival
Aug	Battle of Flowers Moonlight Carnival
Aug	Halkett Hoedown
Sep	Weekender Festival
Sep	National Trust Open Day
Sep	International Air Display
Sep	The Healthy Living Festival
FOOD AND DRINK ORIENTATED EVENTS	
Aug	The Portuguese Food Fayre
Sep	CAMRA Jersey Real Ale and Cider Festival
Oct	Tennerfest
Oct	La Faîs'sie d'Cidre (Cider Festival)
Oct	Black Butter Making
FAMILY-ORIENTATED EVENTS	
Jun	Summer Country Fair
July	Fete de St Helier
Aug	The Jersey Mutual Gorey Fete
Nov	La Fête dé Noué
Dec-Jan	Ice Skating at Fort Regent

Most events take place between May and September. The long-established Flower Festival, International Air Display and Boat Show remain, perhaps, the biggest events.

Figure 43: Sport-Orientated Events

Month	Event
SPORT-ORIENTATED EVENTS	
Jan	Balls of Steel Adventure Racing Festival
May	The Durrell Challenge
Jun	The Jersey Kids Triathlon
Jun	Run Jersey Half Marathon
Jun	Jersey Horse Racing - Les Landes
Jun	British Union Longboard Competition
Jun	The Dandara Colour Run
Jun	Schools National Table Tennis Competition
July	The Logicalis Gorey Regatta
July	El Tico Heritage Paddle Race
July	Tico Beach Touch Rugby
July	Jersey Triathlon
Aug	El Tico Iron Man Race
Aug	Jersey Round Island Challenge
Aug	Jersey Inter Insular v Guernsey Cricket
Aug/May/Jul	Bouley Bay Hill Climb
Sep	Breca Jersey SwimRun
Sep	UBS Jersey Regatta
Sep	European Bowls Team Championship
Sep	Super League Triathlon
Oct	Standard Chartered Jersey Marathon

Figure 44 shows that there are about the same number of significant events in South Lakeland as in Jersey. The profile is different, however, with more festival-type events and less that are physical-activity oriented.

There does not seem to be a comprehensive listing of events in Penwith. Figure 45 shows those we have been able to identify.

Figure 44: South Lakeland Events, 2017

Month	Event
ACTIVITY-ORIENTATED EVENTS	
Apr	Ulverston Walkfest
Aug	Lake District Sheep Dog Trials
Aug	Rydal Show
Nov	Kendal Mountain Festival
CULTURE & ENTERTAINMENT ORIENTED EVENTS & FESTIVALS	
Mar	Ambleside Spring Flower Show
Mar	Mary Wakefield Westmorland Festival
Apr	South Cumbria Musical Festival
Apr	Browness Bay Blues Festival
May	Moonfest Kendal
May	Freerange Comedy Festival
Jun	Country Fest
Jun	Ulverston International Music Festival
Jun	Grange Edwardian Festival
Jun	Kendal Poetry Festival
Jun	Another Fine Fest
Jun	The Dentdale Music & Beer Festival
July	Retro Rendezvous
July	Cumbria Steam Gathering
Aug	Lake District Summer Music International Festival
Sep	Ulverston CAMRA Beer Festival
Sep	Lakes Alive
Oct	The Lakes International Comic Art Festival
Oct	Kendal Wool Gathering
FAMILY-ORIENTATED EVENTS	
Apr	Damson Day Country Fair
Jul	Ulverston Hospice Carnival
Jul	Coniston Country Fair
Jul	North Lonsdale Show
Aug	Cartmel Show
Aug	Rusland Show
Aug	Lakeland Country Fair
Aug	Hawkshead Show
Sep	Ulverston Charter Festival
Sep	Westmorland Country Show
Sep	Kendal Torchlight Carnival
Sep	Ulverston Lantern Procession
Nov	Windermere and Bowness Winter Lights
Nov	Dickensian Christmas Festival
Dec	Kirkby Lonsdale Christmas Fair
Dec	Hawkshead Christmas Fair
Dec	Windermere Christmas Market
FOOD AND DRINK ORIENTATED EVENTS	
May	Taste Cumbria Ulverston Food Festival
Jun	Sedbergh Food & Drink Festival
Sep	Holker Chilli Fest
SPORT-ORIENTATED EVENTS	
May	Fred Whitton Challenge
May	Brathay Windermere Marathon and Half Marathon
Jun	Great North Swim
Jul	A L'ancienne Vintage Cycling Festival
Sep	Chillswim Coniston

Figure 45; Events in Penwith 2017

Month	Event
CULTURE & ENTERTAINMENT ORIENTATED	
May	St Ives Literature Festival
May	St Ives May Day
Jun	Golowan Festival
Jul	Penzance Literary Festival
Jul	Mousehole Sea Salts + Sail Festival
Jul	Lafrowda Festival
Sep	St Ives September Festival
Dec	Montol Festival
FAMILY-ORIENTATED	
Jul	Circus Funtasia, Penzance
Dec	Mousehole Christmas Lights
FOOD & DRINK ORIENTED	
May	St Ives Food & Drink Festival
Aug	Newlyn Fish Festival
SPORT-ORIENTATED	
Sep	St Michaels Mount Swim
Dec	Santa Fun Runs

4.6 PHYSICAL ACTIVITY – LAND BASED

4.6.1 CYCLING

Jersey caters well for cyclists with 6 bike hire companies offering a total of over 600 bikes and an island-wide network of c.100 miles of marked routes. These cater to all abilities from short, flat rides up to a full 40-mile loop of the island. Terrain is mainly suited to hybrid/road bikes with a limited offer for off-road and racing.

Figure 46: Cycle hire shops

Cycle Hire	Seasonal?	Fleet Size
Zebra Cycle Hire	N	300
Jersey Bike Hire / Little Train Cycle Hire (merged)	Open Apr-Oct	300
Big Maggy's Cycle Hire	N	7
Jersey Bus Tours - Bike Hire	Open Apr-Oct	30
Brompton Bike Hire	N	12
Aarons Bikes	N	TBC

The Island's small size and well-marked routes makes exploring the whole island by bike feasible. This is further encouraged by the innovative Jersey 'Green Lane' scheme, first introduced in 1993. It provides routes that gives priority to pedestrians, cyclists and horse riders over motorists.

More serious road cyclists on a dedicated cycling/training holiday may however find the size of the island limiting as they could quickly exhaust many of the routes.

Jersey offers little for off-road/mountain bikers with no dedicated trail centres or bike parks and limited elevation of just 150m.

Coastal trails must be shared with walkers and although some downhill tracks carved out by local enthusiasts exist inland, they are not widely known. The Channel Islands MTB Association holds their Gravity Series Race in Rozel Woods, where there are 6 named trails, as listed on trailforks.com.

Figure 47: Jersey Cycling Atlas

4.6.2 WALKING / TRAIL RUNNING

Jersey's varied countryside and coastline provides attractive walking opportunities. Paths and trails are well marked and signposted with 60 downloadable self-guided routes available online via the Visit Jersey website offering varying distances and difficulties. The undulating coastal paths and terrain also lends itself to the growing sport of trail / x-country running, offering attractive and challenging routes.

Guided walking tours are popular on Jersey with companies and Blue Badge qualified individuals offering guided walks covering themes such as the German Occupation and Maritime History.

The annual Around the Island Walk is one of Jersey's largest charity events. About 1,000 participants partake in one of three challenges, the main one being a 48-mile loop of Jersey by foot.

4.6.3 GOLF

Jersey has a reasonable golf offer with 3 x 18 hole and 3 x 9-hole courses along with a dedicated 20 bay driving range.

Figure 48: Jersey Golf Facilities

Facility	Location	Holes
Les Mielles Golf and Country Club	St. Peter	18 hole
Les Ormes Golf Course	Les Ormes	9 hole
Le Moye Golf Course	St. Brelade	18 hole
Wheatlands Golf Club and Hotel	St. Peter	9 hole
St. Clement's Golf and Sports Centre	St. Clement	9 hole
The Royal Jersey Golf Club	Grouville	18 hole
Longueville Golf Range	St. Clement	20 bay floodlit driving range

It can be a problem for visitors to obtain tee times, especially at times popular with members, and times are not available to tour operators in advance, making it difficult for them to plan tours around them.

This not an unusual situation. Efforts have been made to deal with it in the northwest of England, where there are several famous links courses:

http://www.englandsgolfcoast.com/stay-and-play-packages

4.6.4 MOTOR SPORT

Jersey Motorcycle & Light Car Club is the most active motorsport group on the island with around 550 members. The club runs c.60 events per year, including the annual Jersey Rally, attracting 170 drivers and navigators.

Other clubs include the Jersey Classic & Modern Trials Club, Jersey Kart & Motor Club and Jersey Motorcycle Trials Practice Club.

The annual RUBiS Jersey International Motoring Festival is the largest motor show in the Channel Islands. The four-day event involves competitive sprint and hill climb races alongside motor/trade stands and exhibitions.

4.6.5 CLIMBING

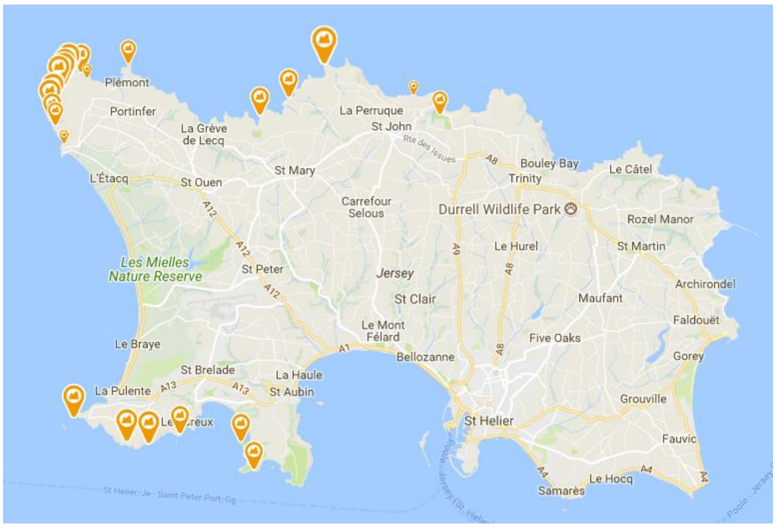
Jersey is a popular rock climbing destination with many established coastal climbing spots. Jersey Climbs guide book lists 28 crags, predominantly located on the south west and north-west coasts of Jersey.

Jersey has one main 12m indoor climbing wall at Langford Sports Centre, an outdoor wall at Creepy Valley Adventure Centre and an indoor traversing wall at Grainville School. A wall at Fort Regent was removed in 2015 due to safety concerns.

Jersey Rock Climbing Club was founded in 1960 and meet weekly, climbing outside on natural rock or inside at Langford during the winter.

Popular natural rock climbing spots used frequently by Jersey Adventures are found at Grosnez and Tresspass Point in St Brelades.

Figure 49: Jersey's Climbing Crags



Source: Jersey Climbs - Guide Book

4.6.6 SKYDIVE

Skydive Jersey offers arguably the highest octane activity available on the island. Tandem skydives are held most weekends of the year, weather dependant, offering jumps from 10,000ft with 30 seconds of freefall before a 5 minute parachute ride to the beach in St Aubin's Bay.

4.6.7 SPORTS INFRASTRUCTURE

Figure 51 has a list of sports facilities on the island, and Figure 50 has a list of hotels that have particularly substantial facilities.

Figure 50: Substantial hotel facilities

HOTEL / RESORT FACILITIES	
Atlantic Hotel	Pool and gym
Grand Jersey Hotel and Spa	indoor pool, steam, sauna, spa, gym
HeathHaus and Ayush Wellness Spa (Hotel de France)	Gym, steam, sauna, spa, fitness, spinning studio
Les Ormes Resort	4 x indoor plexi-cushion tennis courts, gym, soccer dome + 3G pitches, indoor pool
L'Horizon Beach Hotel & Spa	Indoor pool, steam, sauna, spa, gym, tennis courts
Mayfair Hotel Health Club	Indoor pool, steam, gym
Merton Hotel	Aquadome, flow rider surfing, fitness centre
Radisson Blu - Radical Fitness	Indoor pool, sauna, steam, gym
Royal Yacht Hotel - Spa Sirene	Indoor pool, steam, sauna, spa, gym
St Brelade's Bay Hotel - DW Health Club	Indoor pool, steam, gym, studio
The Club Hotel and Spa	Indoor + outdoor pool, steam, 5 x treatment rooms

Figure 51: Sports Facilities

Sports Infrastructure	Facilities
Indoor Leisure Centres / Sports Halls	
Fort Regent Leisure Centre	Gym, sauna + steam, squash courts, shooting + archery ranges, spinning studio, nursery, outdoor ball court, snooker + pool, karate
Les Quennevais - Leisure Centre	25m 8 lane pool, football pitches, cycle track, small pool, gym, 2 x studios, health suite, 2 x squash courts, tennis courts, ball courts, sports hall
New Gilson Hall	5 court badminton hall
Langford Sports Centre	25m 5 lane pool, sports hall, gym, studio, climbing wall, outside ball court, classroom. Used by schools, clubs and associations only
Oakfield Sports Centre	Netball, basketball, 5-a-side football, cricket, hockey, volleyball, short tennis and badminton, studio, gym, football pitch, tennis
St John's Recreation Centre	Squash court
Victoria College	Playing field, 2 x squash courts
Aquasplash	25m pool, leisure pool (spa + wave machine, 2 x flumes, tyre ride), outdoor pool + lazy river, sauna + steam room
Haute Vallée	25 m pool (school + private hire only)
Dedicated Gyms	
Bodyrox	Gym, studio
Club Carrefour and Carrefour Metro	Gym, sauna, spa
Fitness First Jersey	Gym, sauna, studios
Jersey Crossfit	Gym
Radical Fitness	Indoor pool, steam, sauna, spa, gym
South Hill Gym	Boxing ring, punch bags, weights, speedballs
Hotel Facilities	
Atlantic Hotel	Pool and gym
Grand Jersey Hotel and Spa	indoor pool, steam, sauna, spa, gym
HeathHaus and Ayush Wellness Spa (Hotel de France)	Gym, steam, sauna, spa, fitness, spinning studio
Les Ormes Resort	4 x indoor plexi-cushion tennis courts, gym, soccer dome + 3G pitches, indoor pool
L'Horizon Beach Hotel & Spa	Indoor pool, steam, sauna, spa, gym, tennis courts
Mayfair Hotel Health Club	Indoor pool, steam, gym
Radisson Blu - Radical Fitness	Indoor pool, sauna, steam, gym
Royal Yacht Hotel - Spa Sirene	Indoor pool, steam, sauna, spa, gym
St Brelade's Bay Hotel - DW Health Cl	Indoor pool, steam, gym, studio
The Club Hotel and Spa	Indoor + outdoor pool, steam, 5 x treatment rooms
Outdoor facilities / playing fields	
Springfield Stadium	Badminton, clubs and associations, fitness classes, five-a-side, football pitch, gym, table tennis, grandstand, kids play area, sports development, café
Airport playing fields	2 x football pitches, Gaelic football pitch
Grainville Playing Fields	Rugby pitch, junior football pitch, cricket pitch, pavilion
Les Quennevais playing fields	Rugby pitch, 8 x football pitches (1 floodlit), 1 astro pitch, 2 x cricket pitch, 2 x softball diamonds, cycle track, cricket nets, 4 tennis/netball courts
Jersey Petanque Terrains	17 x venues across Island
Les Landes Race Course	Horse racing
Les Creux Millennium Country Park	BMX track, bowling club
FB Fields	400m Athletics Track, Geoff Reed Table Tennis Centre, 2 x cricket pitches summer / football winter, 5 x cricket nets, grass hockey pitch, pavilion
Crabbé Shooting Ranges (clays)	6 x ranges
Stanley England Memorial Range	Shooting range
Racquets	
Caesarean Tennis Club	10 x courts (2 indoor)
Grainville Tennis Club	Pavilion clubhouse, 6 x astro courts (3 floodlit)
Jersey Squash & Racquetball Club	5 squash courts, bar + club room
Les Mielles Tennis Club	4 all-weather floodlit courts, clubhouse

The Jersey Reds rugby union club plays in the second tier of the English RFU championship, having had a meteoric rise through the divisions. Teams they play against commonly bring large numbers of supporters.

4.7 PHYSICAL ACTIVITY – WATER BASED

4.7.1 SAILING

Jersey is a popular sailing destination for both dinghy sailors and yachtsmen, particularly from the UK and France.

The island has 3 sailing clubs: St Helier Yacht Club, the Royal Channel Islands Yacht Club and St. Catherine's Sailing Club.

Jersey Marinas provide 1,000 births for residents and visiting yachtsmen across St Helier, Elizabeth, and La Collette Marinas. Each are situated within St Helier Harbour and have a good standard of facilities including toilets, showers, laundry, wifi, boat yards, chandlers etc. St Helier Marina primarily caters to short-stay visitors with births for up to 200 yachts. St Helier marina has newly joined the Passeport Escales scheme, a European based cruising network offering annual birth holders at participating marinas 10 complimentary nights at 120 participating marinas across Britain, France and Spain.

Other harbours, with more limited facilities, include St Brelade, Gorey Harbour, St Aubin's Harbour, St Catherine's Harbour, Rozel Harbour, Bouley Bay and Bonne Nuit Bay. Each offer only anchorages or visitor mooring buoys with most drying out at low tide.

Jersey Marinas hosts the annual boat show which takes place over a weekend during April / May and attracts c.30,000+ visits.

The annual UBS Jersey Regatta hosts three days of racing for sports boat, cruiser/racer, cruiser, dayboat, dinghy, sport catamaran and Kona windsurfer classes. The races run alongside a shore-side social programme.

Yacht charter is available from the Island's main yacht charter company, Go-Sail.je, with 5 yachts, 1 motorboat and 1 RIB available to hire with or without crew. Go-Sail.je also offers training with RYA certified courses. Other charter companies such as Swan Yacht Charter is based in Cornwall but can arrange for pickups from the Channel Islands. 8 sailing yachts based in Jersey are available for charter via Globe Sailor, a global yacht charter website.

4.7.2 SURF / BODY BOARDING

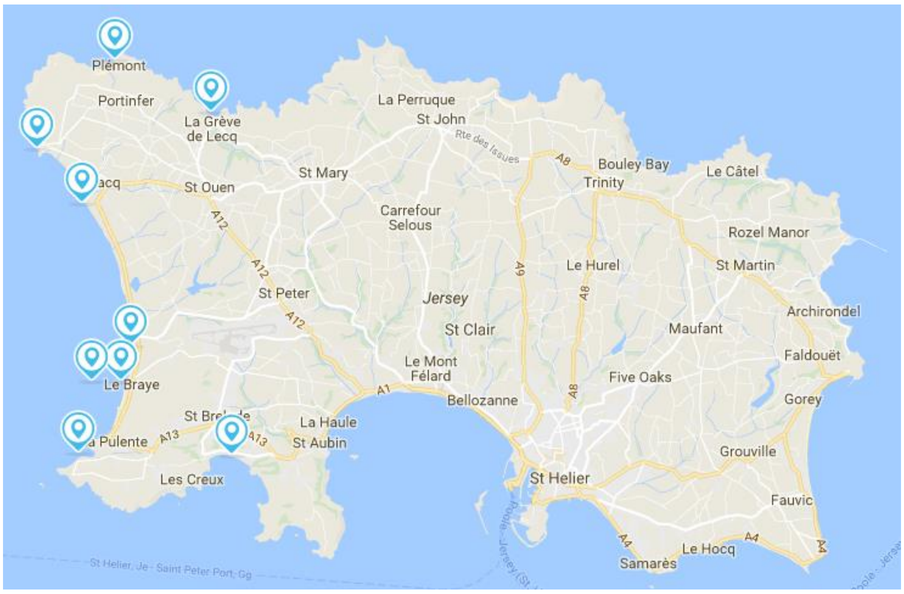
Jersey's exposure to strong Atlantic swells creates good surfing/bodyboarding conditions on the Island's west coast, with the main break at St Ouen's Bay. When wind direction dictates, surf may also be found at St Brelade's Bay on the south-west coast and at Plemont and Greve de Lecq on the north.

There are four surf schools at St. Ouen’s Bay offering board and wetsuit hire and summer camps. Jersey Surfboard Club is well established with c.500 members and claims to be the oldest surf club in Europe.

Various surf competitions are held on Jersey, including the Channel Islands Championships and in 2009 the European Surf Championships.

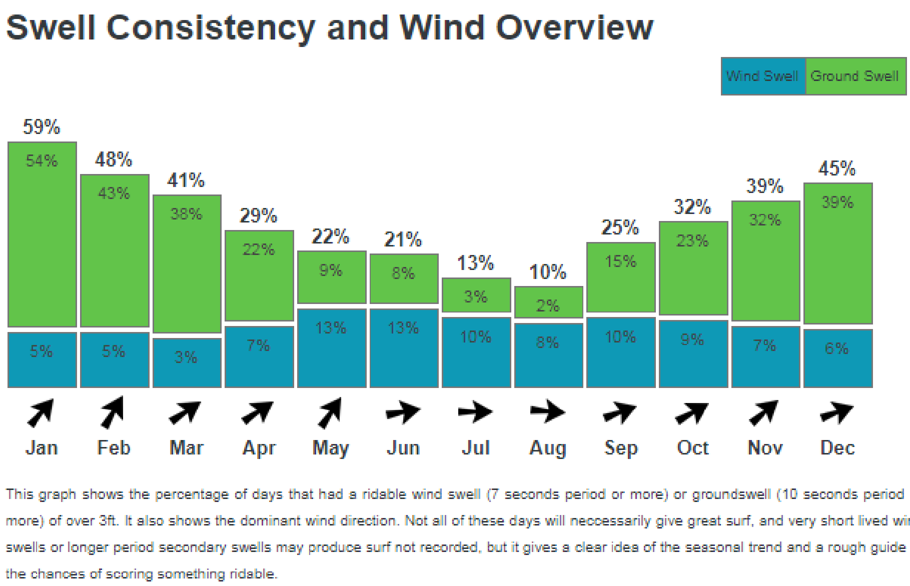
There is a Flow Rider surf simulator at The Merton Hotel.

Figure 52: Jersey surf spots



Source: Magicseaweed.com

Figure 53: Jersey seasonal surf averages



Source: Magicseaweed.com

4.7.3 KAYAKING

Kayaking is an ever popular way to explore otherwise inaccessible areas of the island such as caves, coves, bays and islands.

Kayaks may be hired on a casual hourly basis or part of a guided tour and combined with other activities such as coasteering.

Kayak tours may be held throughout the year but are weather dependant. These are organised by dedicated kayak providers such as Jersey Kayak Adventures along with wider activity organisers such as Absolute Adventures, Pure Jersey, Wild Adventures Jersey, Active Island Sports and Gorey Watersports Centre.

4.8 JERSEY NATIONAL PARK

The National Park covers approximately 30 miles (48km) of Jersey’s coastline, including the southwest headlands, St Ouen's Bay, large parts of the north coast, St Catherine's Bay, parts of Grouville Bay, and the he offshore reefs and islets of the Ecrehous and the Minquiers and Pierres De Lecq (Paternosters). It encompasses 1,925 ha.

It is an initiative led by the National Trust of Jersey. It was endorsed by the States of Jersey in 2011and lodged in the Island Plan. It is designed to offer the highest level of protection to areas that are most sensitive to development.

4.9 PUBLIC REALM

The quality of public realm, including paving of streets and promenades, street furniture such as sign posts and interpretation, car parks and so on has a big impact on the experience of visitors.

It is impossible to be scientific in assessing the quality of public realm in a place, but our judgement is that it is average by UK standards. That means poor by the standards of continental countries.

The matter is considered in detail in a report by Save Jersey’s Heritage called This Realm of Ours. Appendix 6 has photographs of the townscape in the small Dutch city of Amersfoort and Appendix 6 to give an idea of what can be achieved.

There is a percentage for the arts programme and there are some effective works of art around St Helier.

We agree with those who say that the Waterfront development has been a disappointment in terms of destination impact. Many mixed-use waterfront developments around the world have created powerful visitor destinations. Aker Brygge in Oslo is a particularly good illustration of what could have been done in Jersey and might still be possible to an extent. It is also, predominantly, a mix of apartments and offices overlooking water, but has been delivered with panache that makes it a world class destination.

5 FOOD & DRINK, RETAIL

5.1 RESTAURANTS, PUBS AND CAFES

There are about 370 licensed cafés, restaurants and pubs on the island.

Figure 54: Licensed eating and drinking establishments in Jersey

	Number	%	Chains	Good Food Guide	Good Pub Guide	Michelin Star
Café / Restaurant	138	37%	5	4	NA	0
Pub/Bar Restaurant	79	21%	1	2	8	1
Pub/Bars	61	16%	0	NA	2	NA
Hotel	59	16%	2	3	NA	2
Clubs	34	9%	NA	NA	NA	NA
Excluding shops	371	100%	8	9	10	3
Shops	176			NA	NA	NA
Total	**547**		**8**	**9**	**10**	**3**

There are about 170 unlicensed establishments in addition. They are all listed in the database.

Jersey restaurants featuring in the Waitrose Good Food Guide 2015 (those with a Michelin star in **bold**) are:

- Green Island Restaurant, St Clement
- Green Olive Restaurant. St Helier
- Sumas Restaurant, St Martin
- The Oyster Box, St Brelade
- Tassili (Grand Jersey), St Helier
- Longueville Manor, St Saviour
- **Ocean Restaurant (Atlantic Hotel), St Brelade**
- **Bohemia Restaurant (The Club Hotel and Spa), St Helier**
- **Ormer, St Helier**

Jersey Pubs featured in the Good Pub Guide 2016:

- Moulin De Lecq, Grève de Lecq
- Old Court House Inn, St Aubin
- Old Smugglers Inn, St Brelade
- Post Horn, St Helier
- St Marys Country Inn, St Mary
- Tenby Bars, St Aubin
- The Boat House, St Aubin
- The Halkett, St Helier
- Cock & Bottle, St Helier
- Lamplighter, St Helier

Jersey seems to have significantly more places to eat and drink than either South Lakeland or Penwith, and has more Michelin starred restaurants than either. It has less entries in Good Pub and Good Food guides, but that may be a result of circumstance.

Of the top ranked restaurants on Trip Advisor, all in Jersey have been awarded certificates of excellence. They do, however, score slightly lower in terms of average rating than South Lakeland and Penwith.

Figure 55: Food and Beverage in Penwith and South Lakeland

	Restaurants Listed on Trip Advisor	Good Pub Guide	Good Food Guide	Michelin Star
South Lakeland	239	20	15	2
Penwith	277	12	15	0

Figure 56: Trips Advisor ratings and awards of top listed restaurants

Location	Avg. Trip Advisor Rating of top 10 Establishments	Avg. Number of Reviews per Establishment	Awards
Jersey	4.55	650	10 x Certificate of Excellence
South Lakeland	4.95	727	6 x Certificate of Excellence 2 x 2016 Travellers' Choice Award
Penwith	4.8	727	10 x Certificate of Excellence

The 'Genuine Jersey' mark offers consumers the opportunity to identify local produce and support local producers. It covers food and drink, arts and crafts. A Genuine Jersey market is held monthly from June-August.

Supper Clubs are increasing in popularity with events organised by groups such as The Bean Pot. They host monthly dinners, often using Genuine Jersey produce, for people looking for a unique and intimate dining experience. Street food and new pop up food stands have recently emerged on Jersey with 'Street Food Thursdays' held weekly in St Helier.

5.2 CASINOS

There are no casinos on Jersey because of anti-gambling legislation.

5.3 RETAIL

The island's shopping offer is largely focused in St Helier, although there are concentrations of tourist-orientated shops in St Aubin and Gory Harbour, and a scattering of destination stores, like Catherine Best, selling crafted goods of quality,

Figure 57 compares the number of shops in St Helier with Kendal and Truro, the largest places in South Lakeland and Cornwall respectively, and with Chester, which is substantially larger and a major tourist destination.

Information about Kendal, Truro and Chester has been obtained from Promis, which provides a range of information about towns and cities. It does not cover St Helier unfortunately[12]. We have counted the number of establishments.

Figure 57: Number of shops in a selection of places

	St Helier	Kendal	Truro	Chester
Catchment	100,000	134,000	283,000	1,389,000
Shopper Population		59,000	101,000	220,000
Multiples	79	125	151	251
Independents	383	285	282	333
Total:	462	410	433	584

Source: Promis & Colliers

St Helier has a smaller catchment population than the other places, but has the compensating advantage that it can largely monopolise the shopping spend in its catchment, whereas the other towns must share it with other places.

Figure 58 shows the range of the shopping area in St Helier, with the pedestrianised area highlighted. Figure 59 narrows it down a little so that the main streets are visible. The other maps show businesses in the main sections (they are a bit dated).

The proportion of the central business district which is "pedestrian friendly" is lower than is typical of towns on the continent.

Shops of certain type form clusters in all towns and cities, and St Helier is no different. There is, in particular, always a split between sections of towns and cities dominated by high street multiples, and those dominated by independents.

Figure 60 shows the prime shopping area, which is dominated by multiples. It features two substantial department stores, which is not common in a town of this size now and, because they are independent, is an attractive element of the retail offer. Other shops are largely typical of a UK high street, with some local flavour. The units get smaller and the offer more fragmented to the east (Figure 62).

The greatest concentration of independent shops is around the Central Market, as shown in Figure 62.

St Helier is rare for a town of its size in having an indoor market, let alone two. We have recently studied the matter for Market Harborough, a prosperous town in Leicestershire. We found that Market Harborough is almost unique for a town of its size and nature both in having an indoor market and not having a regular outdoor market. We looked at a map and selected as many market towns as we could find in England that had a clear zone of countryside around them, which were not in major holiday tourism areas, and were not more than about twice the population of Harborough, or with lower than 10,000. We identified 30. We then did an internet search to find out what their main markets were. Results are shown in Figure 63.

[12] Neither does EGI, which is a similar information source.

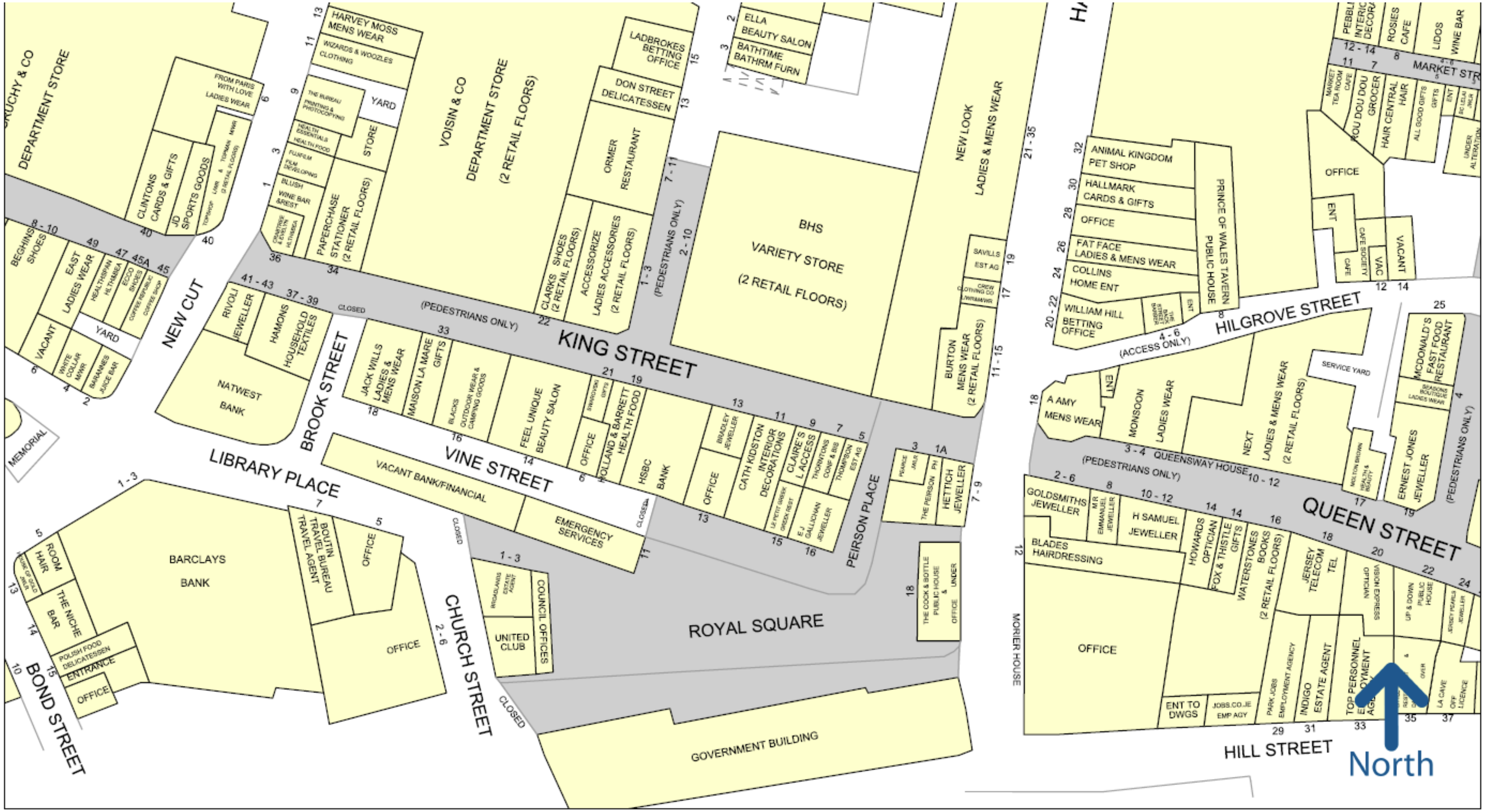
Figure 58: High level GOAD map for St Helier

Source: Experian

Figure 59: St Helier Town Centre

Source: Experian

Figure 60: Prime shopping zone



Source: Experian

Figure 61: East King Street and Charing Cross

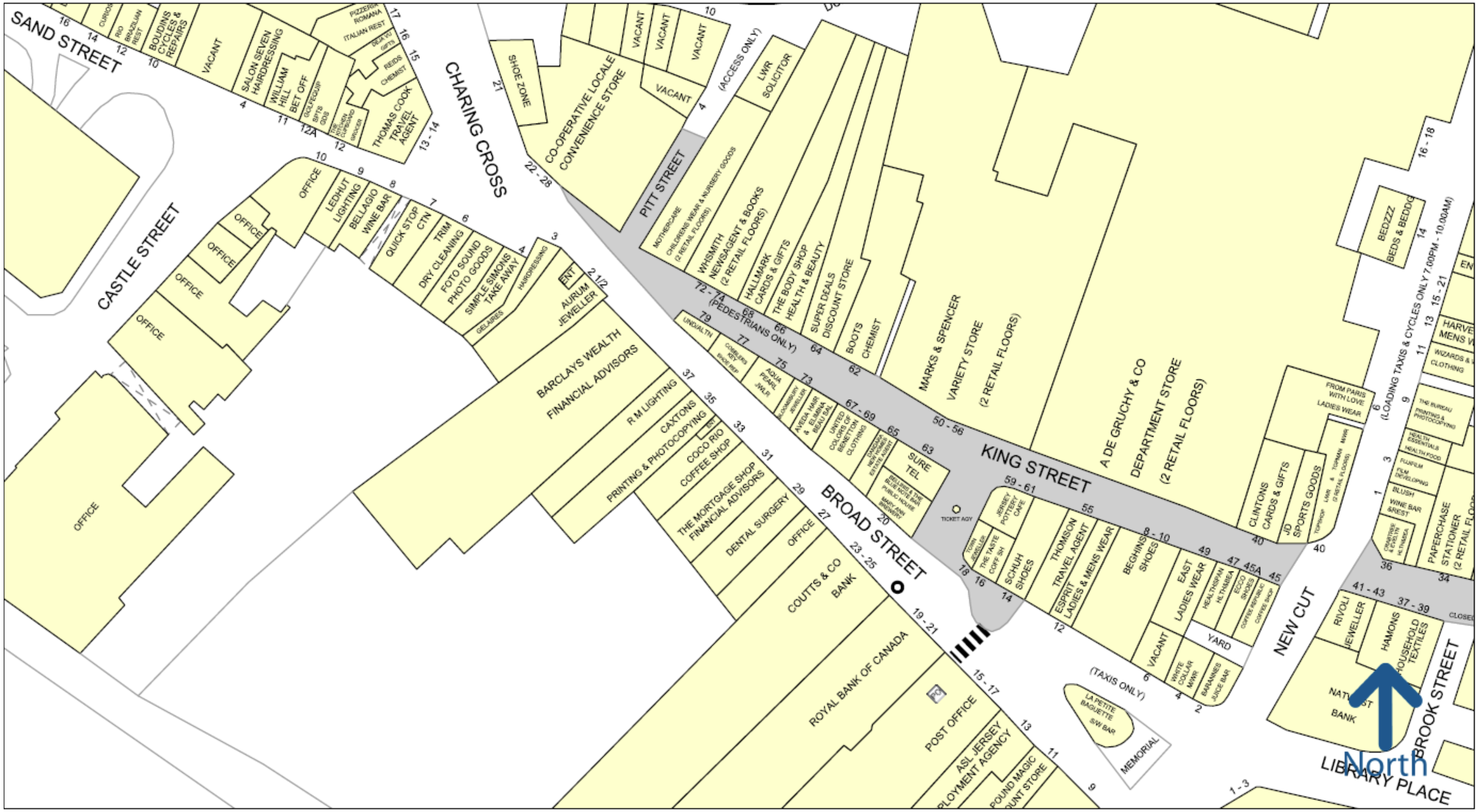
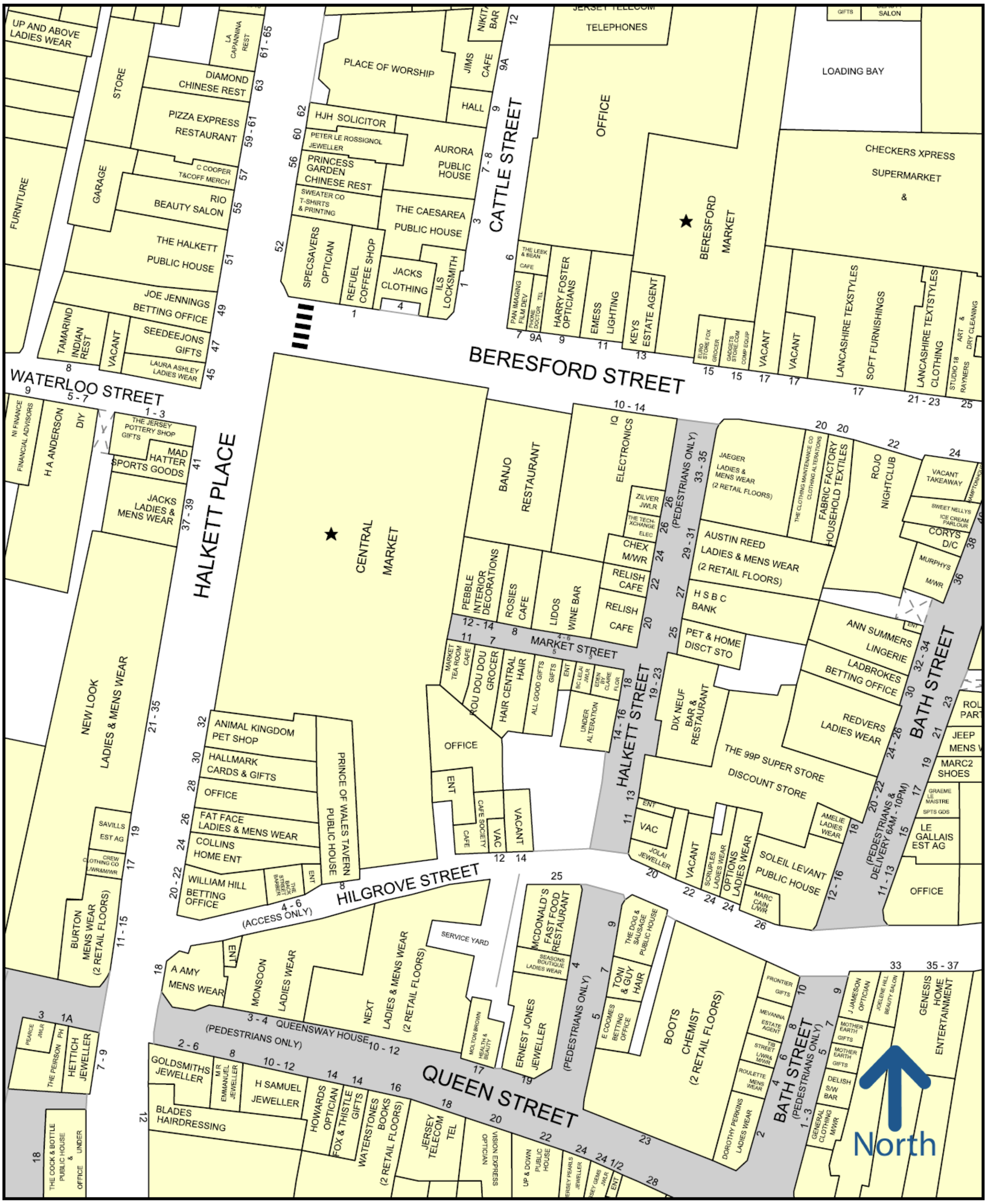


Figure 62: Retail offer around Central Market



Source: Experian

Only three of the other towns have market halls. Cirencester and Devizes are historic market halls that, predominantly, accommodate “pop up” markets. Cirencester is owned by an adjoining hotel.

Appendix 8 has some examples of revitalisation of markets.

Large shops are prohibited from trading on Sundays. Small shops are allowed to do so, but typically do not.

Figure 63: Markets in Market Towns

				Indoor Market			Trad Outdoor		Farmer's Market	
	Town		Pop	Stalls	Built	Last Refurb	Days per week	Stalls	Trading Days	Stalls
1	Downham Market	Norfolk	10,000				2			
2	Sudbury	Suffolk	13,000				2		Last Fri	
3	Uckfield	W Sussex	14,000				-		1st Sat	9
4	Uttoxeter	Staff	14,000				3	2-5		
5	Clitheroe	Lancs	15,000				3	48		
6	Ripon	N Yorks	16,000				1			
7	Nantwich	Cheshire	17,000				3		Last Sun	35+
8	Honiton	Devon	17,000				3			
9	Sleaford	Lincs	18,000				3		1st Sat	20
10	Cirencester	Gloucs	19,000		1863	2014	2		2nd & 4th Sat	
11	Newmarket	Cambs	20,000				2		Sat, May-Oct	50
12	Chippenham	Wilts	20,000				2	30		
13	Ely	Cambs	20,000				3		2nd & 4th Sat	
14	Gainsborough	Lincs	22,000				2		2nd Sat	30
15	Buxton	Derby	22000				2			
16	Market Harborough	Leics	23,000	60+	1993	2014	-		3rd Thu	
17	East Grinstead	W Sussex	24,000				-		Every Thu	
18	Huntingdon	Cambs	24,000				2		Every Fri	
19	Evesham	Worcs	24,000				1			
20	Thetford	Norfolk	24,000				2			
21	Frome	Wilts	26,000				2		2nd Sat	
22	Melton Mowbray	Leics	27,000				2	40-70	Every Tue + Fri	
23	Spalding	Lincs	29,000				2	7-18	1st Sat	
24	Beverley	N Yorks	29,000				2			
25	Devizes	Wilts	32,000	11		2015	1		1st & 3rd Sat	
26	Wisbech	Norfolk	32,000				7			
27	Trowbridge	Wilts	33,000	32	1974		1		2nd & 4th Fri	
28	Bury St Edmunds	Suffolk	35,000				2	80+	2nd Sun	
29	Banbury	Oxon	44,000				2	30+	1st Thu	
30	Andover	Hants	52,000				2		3rd Sun	
31	Horsham	W Sussex	56,000				1			

6 PLANNING / DEVELOPMENT

6.1 THE ISLAND PLAN

The Island Plan is the framework for all planning decisions in Jersey. The law states that all development should be in accordance with the Plan unless there is sufficient justification for granting planning permission that is inconsistent with it.

The current plan dates from 2011. Elements were amended in 2014, mainly to strengthen policies for affordable homes. It is a legal requirement for the plan to be reviewed every 10 years. The next full review will be needed by 2020.

The Revised 2011 Island Plan is in two parts: a written statement of policies and proposals, and a Proposals Map.

This section summarises elements of the plan that are of particular relevance to tourism development.

6.1.1 THEMES

There are three main themes of the plan: countryside protection; the wise use of resources; and urban regeneration.

It provides a clear hierarchy for where development should take place, with priority in the following order:

- Development within the main Built-up Area of the Town of St Helier;
- Development within the Built-up Area outside the Town of St Helier, including those parts of the Island's urban environment identified and defined in the hierarchy of settlements and defined on the Proposals Maps;
- Development of brownfield land outside the Built-up Area, to meet an identified need and where it is appropriate to do so;
- In exceptional circumstances, the development of land outside the Built-up Area to support the rural economy or parish communities, to meet an identified need and where it is appropriate to do so.

6.1.2 USE OF FORMER AGRICULTURAL BUILDINGS

The plan states that "unlike many parts of the UK, Jersey does not have a stock of outworn and vacant industrial land that is ripe for development. What the island does have, is a stock of agricultural buildings, such as redundant and derelict glasshouse sites, which may help contribute towards the island's development needs over the Plan period. Not all brownfield land, and in particular, redundant glass, will be suitable for redevelopment because of factors of remoteness; distance from services, amenities and transport; and sensitive landscape location, and each site will need to be considered on its merits relative to specific criteria".

This implies that agricultural buildings, including glass houses, can be considered for tourism use. The plan is moderately positive towards that.

6.1.3 CHANGE OF USE

Policy SP3 states that “the re-use and / or redevelopment of land and buildings outside the Built-up Area in employment use based on a hierarchy of priorities in favour of its use within the economic sector for which permission was originally granted, followed by its use in support of the rural economy, with a presumption against its use or redevelopment for other uses”.

This implies, in other words, provides a presumption against conversion of tourist property to other uses outside of St Helier, but not in St Helier.

6.1.4 REGENERATION OF ST HELIER

The plan requires most development to take place in St Helier and makes the regeneration of St Helier a key priority.

Three main elements of that are “protecting and enhancing the Town environment”, “delivering the St Helier Waterfront” and “managing change”.

“Managing change” refers to managing regeneration opportunities that result from relocation of business to the Waterfront and from optimising development sites that can catalyse area-wide regeneration.

The plan requires the Minister for Planning and Environment to develop, in consultation with stakeholders and the local community, masterplans and development briefs for these areas and key sites within them. Area-based masterplans will include or be supplemented by a design framework or design code. They will be adopted as supplementary planning guidance.

The plans identifies six Regeneration Zones, shown on Figure 1.

- **North Town**: This area covers St. Helier's nineteenth century expansion. Key sites for regeneration include the Town Park site; the former Jersey College for Girls site; the former Ann Street Brewery site and Ann Court, as well as vacant land to the south of the Odeon Cinema and the Minden Place MSCP site. The masterplan for this area has been produced.
- **Mont de la Ville**: This includes Fort Regent, its associated space and buildings, development sites at South Hill and the green space provided by Rue de L'Est and Mount Bingham. The plan states that these “present the town with considerable opportunity and an asset capable of a use and value of greater benefit to the local community”.

Figure 64: Regeneration zones in St Helier

- **Western Gateway**: the plan comments that this area has been undergoing change, driven to an extent by changes from tourist accommodation to residential, and that this may continue to offer regeneration potential.
- **La Collette and the Port**: "the present port facilities are ageing and inefficient - both for freight and passenger traffic. The port cannot support either 24hr operations or berthing for larger vessels, and, taking a long-term view, it is possible that there will be a need for a new port. Crucially, revenues from the current port operation cannot support a major capital improvement. Feasibility work has shown that a new port could be sited, in various configurations, at La Collette where there is significantly deeper water. A new port will need to have sufficient land and buildings available to accommodate commercial port operations and potential expansion over the port's lifetime. It will also need to be

able to accommodate berthing for larger ships and tankers up to 180m. The scale of investment means that it is unlikely that this infrastructure can be funded by the States of Jersey out of its normal capital programme. A new port is therefore only achievable if it can be funded by the realised value of development in the Elizabeth Harbour area, as part of the next phase of the waterfront redevelopment. Relocating the facilities of Elizabeth Harbour, New North Quay and Victoria Pier to La Collette, and reclaiming some of the area between the breakwater arms at Elizabeth Harbour, immediately adjoining the terminal, could potentially create an area of around 13.8ha (34 acres) which through residential and other development could pay for the costs of a new port. It is estimated that this area could provide between 600-800 new homes".

- **Old Harbours**: "this includes the old French and English Harbours, where there is a strong sense of the maritime functions of historic St Helier and strong sense of identity and character generated by the architecture and mix of uses, which still includes maritime activity and provides an active, colourful and living water's edge. The potential for the greater integration of this area into the new St Helier Waterfront and the introduction of greater residential, marine leisure and cultural activities will be the subject of further consideration. The area also includes La Folie, New North Quay and Commercial Buildings which are considered to offer development potential but care will need to be given to the retention of the area's distinct character, conferred by its architecture, detailing and craftsmanship and mix of genuine uses, for a successful outcome".

6.1.5 CONSERVATION

The plan gives high priority to conservation of historic buildings and includes a policy for establishing conservation areas[13]. It sets out the principles for agreeing applications made for conservation areas. It identifies areas of historic character in St Helier, each of which have their own distinct identity:

Figure 65: Historic character areas in St Helier

- Havre des Pas: seaside exuberance
- The Terraces, including Royal Crescent, Don and Grosvenor Terraces, St Saviour's and Waverley Terraces, Almorah and Victoria Crescents and Gloucester Terrace: formal set pieces;
- West Park: seaside exuberance
- Old Town: the historic core
- The Parade: northern town expansion
- Great Union Road: town expansion
- Northern Town, including St Mark's and Stopford Roads, Victoria St and St Thomas' Church: town expansion
- Old harbours: old seaport and trade buildings

[13] These are long established in Britain and almost all UK towns and cities have them

6.1.6 WATERFRONT DEVELOPMENT

The plan acknowledges The Esplanade Quarter as being “the key location on St Helier’s waterfront, because it straddles the area between the old town and the new area of waterfront. Until now, proposals have failed to provide the quality, ease of access and seamless connection between town and waterfront that people have been expecting”.

“The Masterplan for the Esplanade Quarter proposes the sinking of Route de la Liberation to provide seamless links between the old town and the waterfront. The current surface level car park will be replaced underground. The sinking of the road allows for a large volume of development without the need for tall buildings. A grid of streets and boulevards will integrate with the old town and create a number of public squares and public open and enclosed spaces. It is envisaged that the development of this land will provide around 630,000 square feet of office space, around 350-400 apartments, a 30 bedroom hotel, 65 self-catering tourist apartments and a range of shops, restaurants and bars”.

“The proposals provide an extended financial quarter designed to meet the needs of those existing businesses in Jersey wishing to upgrade and improve operating efficiency through a large footplate, raised floor buildings, easily accessible to transport and the town centre, and to accommodate new businesses”.

Policy BE 2 states that the supplementary guidance developed in 2006 and the masterplan remain the principal material considerations in the determination of planning applications for the development of the St Helier Waterfront.

6.1.7 JERSEY AIRPORT

The plan says the main opportunity for development outside St Helier is at the airport, as part of a strategy to make it less dependent on aeronautical revenue.

6.1.8 SPECIFIC TOURISM POLICIES

The plan states that “Jersey’s more traditional industries, such as agriculture and tourism, make up about 1% and 3% of total economic activity and employ 3% and 10% of the workforce respectively, with a relatively large proportion of these being seasonal workers. They are no longer the dominant industries they used to be, but are still important for their contributions to the environmental and social fabric of the Island”. It identifies a range of benefits that tourism produces, including enabling viability of flights and ferry services. Policies specific to tourism are contained in the economy section of the plan

Figure 66: Policy EVE 1: Visitor accommodation, tourism and cultural attractions

The development for new tourism accommodation, and extensions to existing hotel, guest house, other tourism (including self-catering) accommodation and visitor attractions, will be permitted within the identified built up area boundary provided it accords with Policy GD 1 ‘General development considerations’.

Within the Green Zone, proposals for visitor accommodation, tourism and cultural attractions will be determined in accordance with Policy NE7 'Green Zone'.

Within the Coastal National Park, proposals for visitor accommodation, tourism and cultural attractions will be determined in accordance with Policy NE 6 ‘Coastal National Park’.

Proposals for visitor accommodation, tourism and cultural attractions with implications for the Marine Zone will be determined in accord with Policy NE 5 ‘Marine Zone’.

Figure 67: Policy EVE 2: Tourist Destination Areas

Within the Tourist Destination Areas designated on the Proposals Map, the Minister will support:

•environmental enhancements to the public realm;

•proposals for al fresco activities associated with restaurants, bars, cafés and outdoor performances; and

•improvements in accessibility for pedestrians, cyclists and public transport users and associated signage.

Proposals for new tourist accommodation and support facilities will be permitted in the Tourist Destination Areas provided that the development accords with Policy GD 1 ‘General development considerations’.

Proposals with implications for the Marine Zone will be determined in accord with Policy NE 5 ‘Marine Zone’.

Figure 68: Policy EVE 3 Tourism support facilities in the countryside

Proposals for tourism or support facilities including public conveniences, cafés and kiosks will be permitted where the proposal promotes informal recreational activities appropriate to the sensitivity of the countryside and accords with Policy GD 1 ‘General development considerations’.

Within the Coastal National Park, proposals for tourism support facilities will be determined in accordance with Policy NE 6 ‘Coastal National Park’.

Figure 69: Policy EVE 4 Beach kiosks

The Minister for Planning and Environment accepts that existing beach kiosks and cafés provide for the special needs of beach users.

There will be a presumption against the loss of catering facilities for beach users.

Proposals for the change of use of a kiosk/café to a restaurant or other use, which no longer serves the beach trade and where it would result in a substantial increase in the size of the existing building will not be permitted.

6.2 PLANNING APPLICATIONS

We looked through the planning applications made in parishes outside St Helier over the period 1 July 2016 to 30 June 2017 to see if there seemed to be any patterns affecting tourism related applications.

Figure 70 shows 9 decisions that appear to have been “favourable” to tourism, one of which was conversion of agricultural outbuildings to self-catering.

Figure 70: Decisions that appear to be favourable to tourism

Description	Decision
Change of use from self-catering accommodation to 9 No. one bed apartments.	Refused
Construct restaurant and 2 two bed units of self-catering tourist accommodation.	Approved
For all-weather equestrian riding area	Approved
Change of use from Bank (Class A) into Restaurant (Class B)	Approved
Change of use of fields to extend camp site.	Approved
Convert lodging house into 5 self-contained units.	Approved
Change from self-catering accommodation to 13 apartments.	Refused
Change of use of part of first floor from medical to leisure.	Approved
Convert outbuilding into 5 self-catering units.	Approved

Figure 70 shows 3 decisions that appear to have been “unfavourable” to tourism, one of which was refusal of conversion of agricultural outbuildings to self-catering. The reason for the refusal was that the proposals were considered inappropriate for the historic building concerned and its setting.

Figure 71: Decisions that appear to be favourable to tourism

Description	Decision
Demolish existing restaurant. Construct four bed dwelling with basement parking.	Approved
Convert existing guest house into six bed dwelling.	Approved
Convert existing outbuilding to create 5 units of self-catering accommodation	Refused

6.3 FORT REGENT

Fort Regent is the most obvious site where large scale investment that could affect tourism might take place.

A vision for the fort was developed by a team led by HOK in 2014.

https://www.gov.je/Leisure/FortRegent/Pages/AboutFortRegent.aspx

It envisages an elevator link from Snow Hill in order to provide easy access from the town centre. The fort would be refurbished to contain a similar kind of mix of leisure uses as current, but reconfigured and of better standard.

The proposals include an events centre with “multipurpose halls capable of providing a 2,000 seat arena / auditoria, breakout and VIP spaces and 2,000 sq m of exhibition space. This would be a ‘fit-for-purpose’ facility with appropriate sound proofing, acoustics and IT systems appropriate for concert and sporting ‘arena’ events and conferencing”.

It envisages a hotel of up to 120 rooms on the swimming pool site.

The States website says the plans “will be used to form a business case for securing funding in the 2016 to 2019 Medium Term Financial Plan”.

6.4 PROJECT FUNDING

The Tourism Development Fund TDF https://business.jersey.com/tourism-development-fund has historically been a source of funding support for enhancement of the tourism product. The TDF has exhausted current funds and a case for future funding is being worked up.

6.4.1 SITUATION IN BRITAIN

There are a few sources of funding for tourism related projects in Britain:

The most significant is the Heritage Lottery Fund. This distributes a substantial proportion of the funds generated by the National Lottery to heritage-orientated projects. They have a number of programmes, significant ones being:

- Heritage Grants. For investment in standard heritage sites and museums. It has, for example, provided large grants for the upgraded Tate St Ives and the new V&A on Dundee waterfront.
- Heritage Enterprise. This provides grants towards schemes that involve the development of historic buildings for commercial or semi-commercial purposes. The aim is to cover the “conservation deficit”, which is the costs, caused by the challenges of converting historic buildings, of creating a viable scheme. We advised HLF to create this programme and it has very successful. It has provided funding towards projects like converting a historic building in Belfast Dock to a boutique hotel, and converting historic fishermen’s cottages in the north of Scotland to a hostel. It has a maximum of £5 million. We have recently prepared a report for HLF recommending that they include residential as an acceptable use because that is often the most viable use for historic buildings and produces many public benefits.
- Townscape Heritage. This provides grants to businesses in historic areas for improving their buildings, and also for public realm work.
- Parks for the People. This provides grants for restoration and improvement of public parks.

Arts Council England, and its equivalents in the other home countries, makes grants for investment in cultural facilities like theatres and art galleries. It also distributes funds from the National Lottery.

The Sports Council, which also gets National Lottery funding, makes some capital grants, but not many.

Other funding streams are on a considerably more limited scale.

Visit England, for administers a fund for tourism development projects called Discover England. It is only £40 million over 3 years, however.

https://www.visitbritain.org/discover-england-fund

There is a government fund called Coastal Communities, of similar scale, which provides grants to projects in coastal towns that have been adversely affected by the decline of traditional seaside tourism.

There are also sometimes funding programmes from the European Regional Development Fund (ERDF), although on a lesser scale than in the past. Tourism in Cornwall has been a major beneficiary of this. It provided a large proportion of the funds for the Eden Project.

All of these grant schemes are competitive and it is rare for grants to be made to any development that is overtly commercial. This is largely because of anti-competitive legislation.

Jersey is equivalent, in many respects, to a local authority in Britain. Local authorities often provide capital funds towards projects that have a visitor dimension, often as matching funding towards grants from, for example, Heritage Lottery Fund.

6.4.2 SITUATION IN IRELAND

The options for funding are more limited in Ireland and it is more normal for the government to decide to provide funding for a project because it decides it is a priority. They have also benefited from substantial ERDF funding.

The main grant scheme for tourism related projects is administered by Fáilte Ireland, the national tourist board. It is distributing €65m over the four years from 2016 -2020.

7 ACCESS

7.1 AIR

Figure 75 shows scheduled flights to Jersey Airport. It shows good coverage to London and UK regional airports, but poor links elsewhere. Loss of Air Berlin services was quoted by stakeholders as having had a significant adverse effect.

The experience at the airport is middling. The terminal, especially arrivals, is tired.

7.2 FERRY

The main routes for tourists, or potential tourists, are from Poole and St Malo.

Figure 72: Ferry Services to Jersey

Origin	Operator	Duration (hours)	Frequency / week
Guernsey	Condor Ferries	1h	14
Poole	Condor Ferries	4h30	7
Portsmouth	Condor Ferries	10h20	7
St Malo	Condor Ferries	1h20	14
Carteret	Manche Iles Express	1h5	5
Granville	Manche Iles Express	1h25	9
Guernsey	Manche Iles Express	1h20	2
Sark	Manche Iles Express	1h10	4

7.3 CRUISE

Jersey's capacity to attract stops by cruise ships is severely hindered by the fact that it does not have a berth that they can occupy for a substantial time. Passengers must be disembarked by tender. There will be 10 visits in 2017.

Figure 73: Cruise Ship visits 2017

Date	Vessel	Cruise Line
22-Apr	MV Viking Sky	Viking Cruises
23-Apr	MS Hamburg	Plantours
25-May	MV Astoria	Cruise and Maritime Voyages
06-Aug	MS Aegean Odyssey	Voyages to Antiquity
06-Aug	MS Europa 2	Hapag-Lloyd Cruises
13-Aug	MS Pacific Princess	Princess Cruises
21-Aug	MS Pacific Princess	Princess Cruises
28-Aug	MV Astoria	Cruise and Maritime Voyages
16-Sep	MS Europa	Hapag-Lloyd Cruises
28-Sep	SS Navigator	Regent Seven Seas Cruises

7.4 PARKING

Parking on streets and in most public car parks is paid for with parking cards which can be bought shops and garages. It is an unusual system that probably causes visitors with cars some confusion and inconvenience. There is, apparently, insufficient parking in central St Helier, although this may affect visitors, who might normally park in locations like the waterfront, more than locals.

7.5 VISITOR INFORMATION

Visit Jersey produces a guide to Jersey and a visitor map. Both are of high quality in our judgement. They are available for free and prominently displayed on arrival at the airport.

There is a wayfinding and interpretation system in St Helier that gives information about the history of the locale.

There is a tourist information centre at the Jersey Museum that seems to be an appropriate location and appropriate to the scale of tourism in Jersey. The need for physical tourist information centres has been reducing as it becomes so easy to access information online, but they still have a useful role.

7.6 ON ISLAND TRANSPORT

7.6.1 BUSES

LibertyBus operates the Island's public bus services. It is delivered by CT Plus Jersey under contract to and in partnerships with the Transport and Technical Services Department at the States of Jersey.

The main bus station is located off the Esplanade in St Helier and offers 26 routes spanning out from St Helier, offering good island coverage. There are however limited options for those wishing to travel east-west or west-east, so people need to go via St Helier and change buses.

UK concessionary bus passes are not valid on Jersey bus services.

Figure 74: LibertyBus Map

7.6.2 TAXIS AND HIRE CARS

10 taxi companies operate on Jersey, the largest of which operate over 30 cars across the island.

Several stakeholders commented to us that it would be advantageous if there was a consistent colour scheme for taxis. Bristol is an example of a city that has achieved this, all its licenced taxis now being blue.

Two companies, Prime and Home James, offer Carback services in which drivers and their car are dropped home.

Four car rental companies include Hertz. Europcar, Avis and Zebra.

Figure 75: Scheduled Flights to Jersey

Origin		Airline	Mon	Tues	Wed	Thurs	Fri	Sat	Sun
Aberdeen	From 29 April '17	Flybe						X	
Basel	8 April - 14 Oct '17	Flyskywork						X	
Belfast		EasyJet		X				X	
	5 July - 31 Aug '17	EasyJet			X	X			
Birmingham		Flybe	X	X	X	X	X	X	X
Bristol		Flybe	X	X	X	X	X	X	X
Cardiff		Flybe	X					X	X
Doncaster Sheffield		Flybe	X	X	X	X	X	X	X
Dublin	10 April - 29 Sept	Aer Lingus	X			X	X		X
	24 June - 9 Sept	Aer Lingus		X				X	
Durham Tees Valley	6 May - 23 Sept	Flybe						X	
Düsseldorf	3 June - 9 Sept	Eurowings						X	
	29 April - 30 Sept	Flybe						X	
	3 Jun - 9 Sept	Lufthansa						X	
East Midlands		Flybe	X	X	X	X	X	X	X
Edinburgh	20 May - 22 June and from 15 Aug	Flybe		X		X		X	X
Exeter		Flybe	X	X	X	X	X	X	
Funchal	Various dates								
Glasgow		EasyJet		X		X		X	X
London Gatwick		BA	X	X	X	X	X	X	X
		EasyJet	X	X	X	X	X	X	X
London Luton	Until 30 Oct	EasyJet	X				X	X	X
	Until 22 June	EasyJet				X			
	From 28 June	EasyJet			X				
London Southend				X				X	
	From 4 May					X			
Malaga	30 Sept - 4 Nov	Flydirect (charter)						X	
Manchester		Flybe	X	X	X	X	X	X	X
Munich	3 June - 9 Sept	Lufthansa						X	
Newcastle		EasyJet						X	
	13 April - 22 June	EasyJet				X			
	Until 20 June '17	EasyJet		X					
	From 28 June '17	EasyJet			X				
Norwich	From 1 May	Loganair	X				X	X	X
	From 31 May	Loganair			X				
Palma	17 May - 20 Sept	Flydirect (charter)			X				
Southampton		Flybe	X	X	X	X	X	X	X

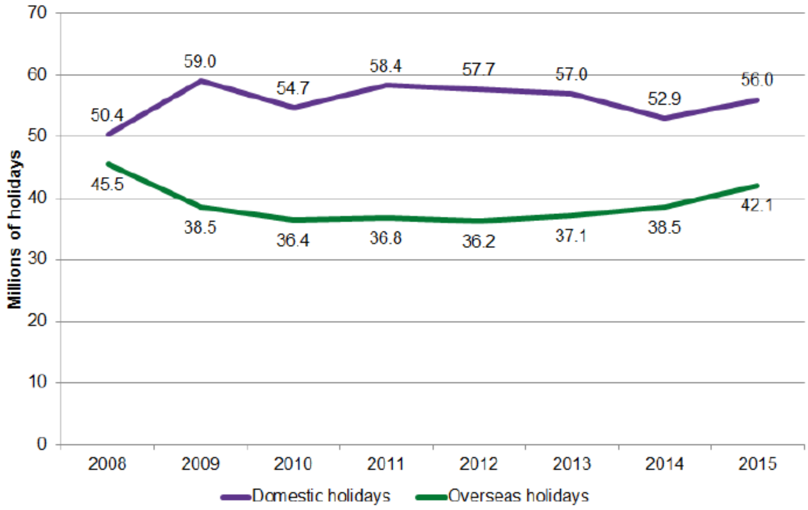
APPENDICES

1 UK HOLIDAYS

1.1 MARKET TRENDS

Figure 76 shows that the number of holidays taken in the UK by UK residents has been broadly static in recent years, with the number of holidays taken overseas starting to show signs of recovering back to pre-2008 levels. The fall in sterling following the Brexit vote will probably give impetus to domestic holidays in the short to medium term.

Figure 76: Holidays by UK residents



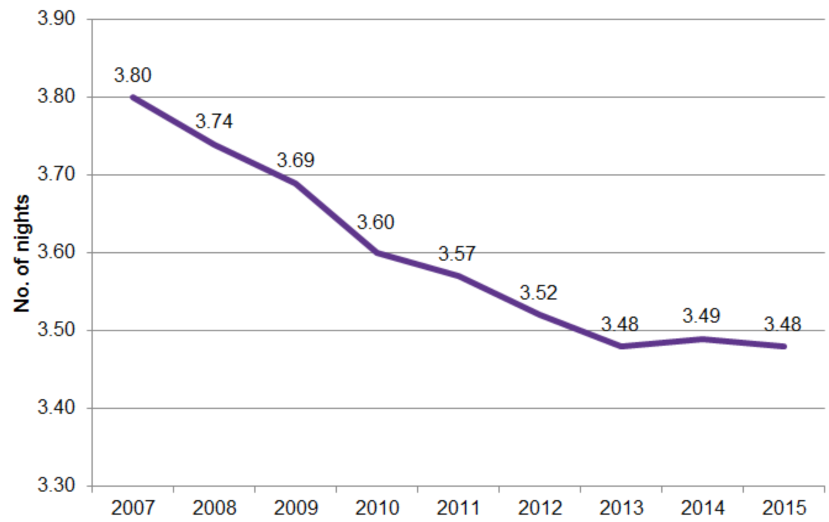
Source: Great Britain Tourism Survey / Mintel

About 50% of UK adults took a domestic holiday in the 12 months ending July 2016. 23% took at least four UK breaks in that period. Figure 78 shows that the average length of stay has been decreasing, however. This is a long-term trend which is a factor of people taking their main holiday abroad and supplementing it with short breaks in the UK. Figure 77 shows that about two thirds of domestic holidays are 1-3 nights in duration.

Figure 77: Domestic holidays in the UK

Great Britain	1-3 nights		4+ nights		Total holidays
	000	% share	000	% share	000
2011	37,056	63.4	21,378	36.6	58,435
2012	37,331	64.7	20,364	35.3	57,695
2013	36,785	64.6	20,184	35.4	56,969
2014	33,857	64.0	19,034	36.0	52,891
2015	36,533	65.3	19,427	34.7	55,960
2011-15 % change	-1.4		-9.1		
2014-15 % change	+7.9		+2.1		

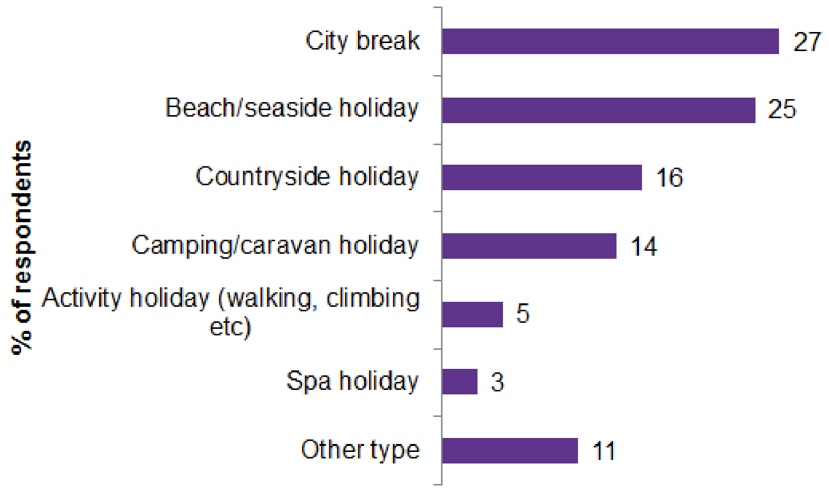
Figure 78: Average length of domestic holidays



Source: Great Britain Tourism Survey / Mintel

Two groups are most likely to take holidays of more than 3 nights: families with children under the age of 5, and people in retirement. Figure 79 shows that the seaside remains a powerful lure for holidays. Spa holidays form a small but significant niche.

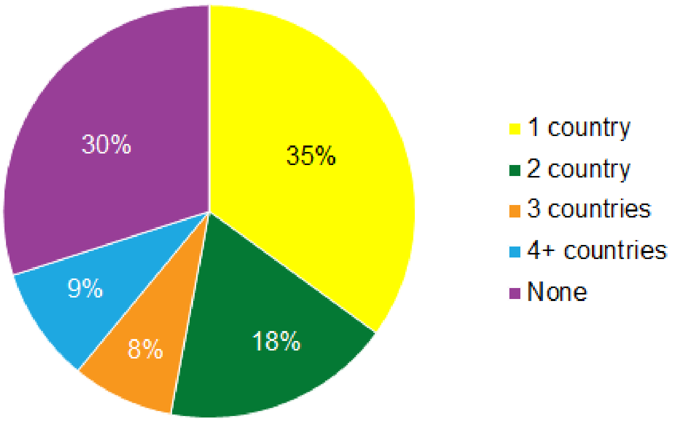
Figure 79: "Which of the following best describes your last holiday in the UK? Please select



Base: 1,007 internet users aged 16+ who have taken a holiday in the UK in the last 12 months. Source: Lightspeed / Mintel

Figure 80 shows that a large proportion of consumers take multiple short breaks annually, often to more than one country. Mintel reports that Londoners are far more likely to be high-frequency holidaymakers than those elsewhere; some 29% have been on three or more short breaks in the last year.

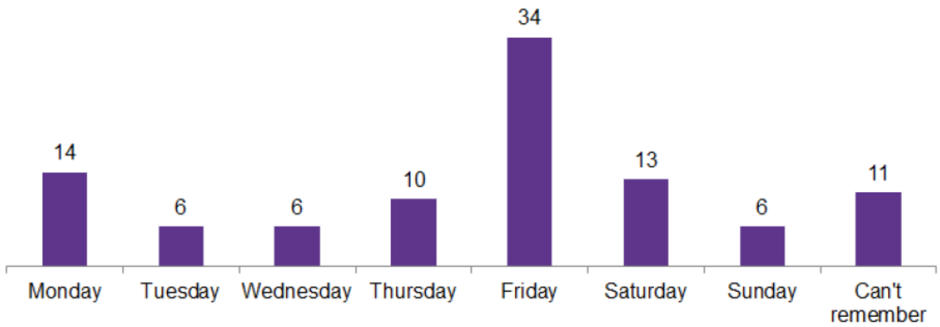
Figure 80: Short breaks taken in previous 12 months



Base: 2,000 internet users aged 16+. Source: Lightspeed GMI/Mintel

Figure 81 shows that Friday is much the most popular day for starting a short break.

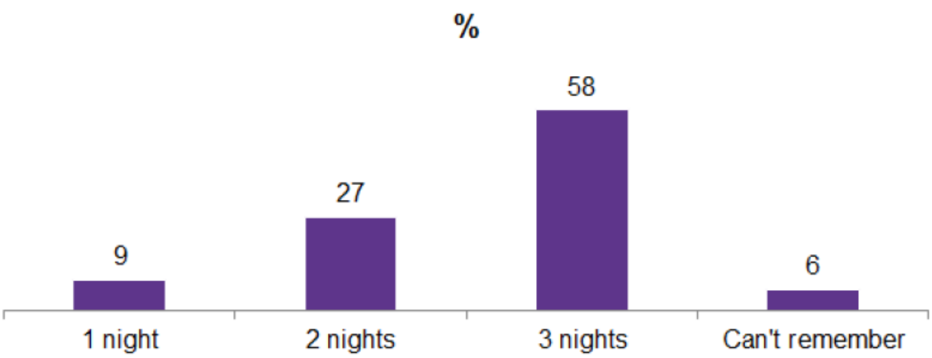
Figure 81: Thinking about your last short break, which day was the first night of the trip?



Base: 1,406 internet users aged 16+ who have been on a short break in the past 12 months. Source: Lightspeed GMI/Mintel

Figure 82 shows that 3 nights is much the most popular length for short breaks.

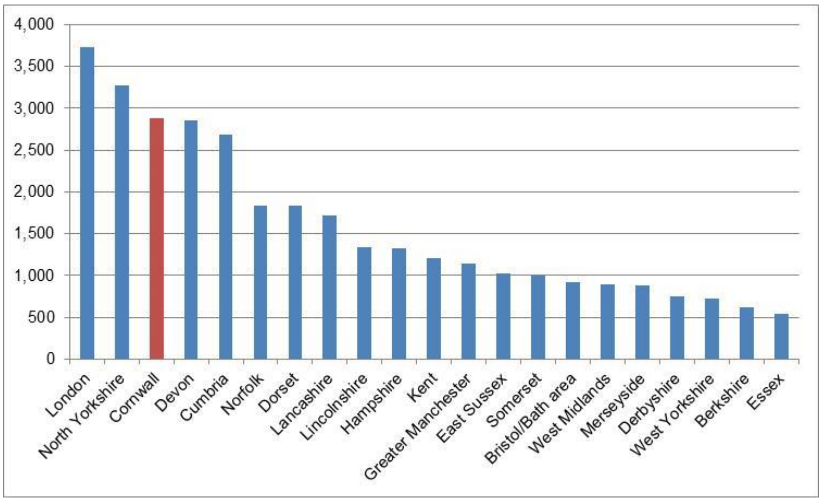
Figure 82: How many nights was your last short break?



1.2 TOURISM IN CORNWALL

Tourism is a major part of the Cornish economy. Research on behalf of Visit Cornwall estimated that it accounted for about a quarter of the county's FTE jobs. Cornwall is, arguably, Britain's leading holiday destination. It attracts the third largest number of holiday trips by UK residents[14].

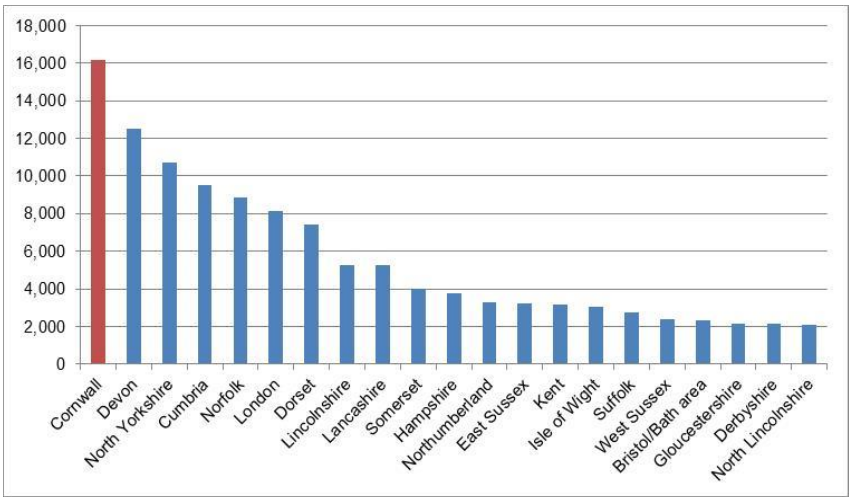
Figure 83: Holiday trips by UK residents (average per annum 2013-5)



Source: Great Britain Tourism Survey

The number of nights spent on holiday in the county is far ahead of any other because the average length of stay is longer. That is because people are more likely to go to Cornwall, than other parts of the UK, for 1 or 2 weeks rather than a short stay.

Figure 84: Holiday Nights

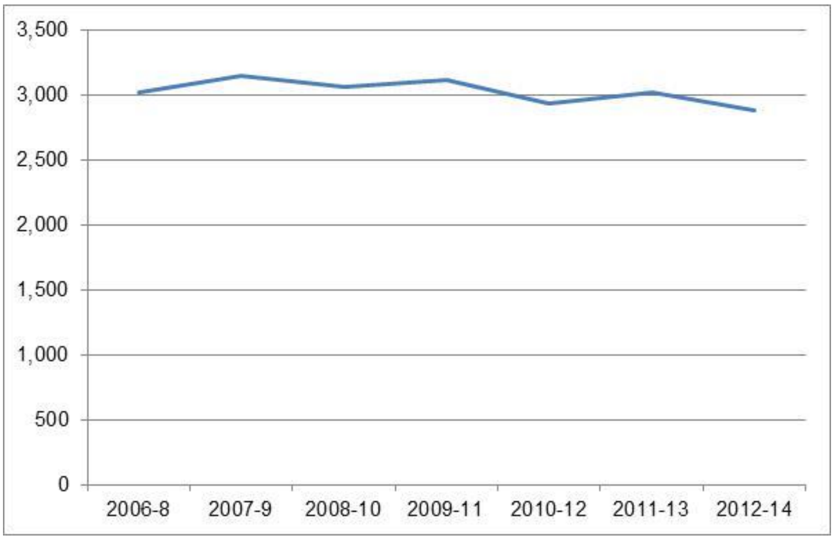


[14] It is possible that it is top in terms of genuine holidays because these trips will include a proportion by people who say they are taking a holiday trip but are in fact staying with friends and relatives and probably would not have made the trip but for that. That increases the number of trips in areas that have a high resident population, which Cornwall does not.

Source: Great Britain Tourism Survey

The Great Britain Tourism Survey (GBTS) estimates that c.3 million UK residents visit Cornwall annually. The number seems to be on a slight downward trend[15].

Figure 85: Holiday trips to Cornwall by UK residents

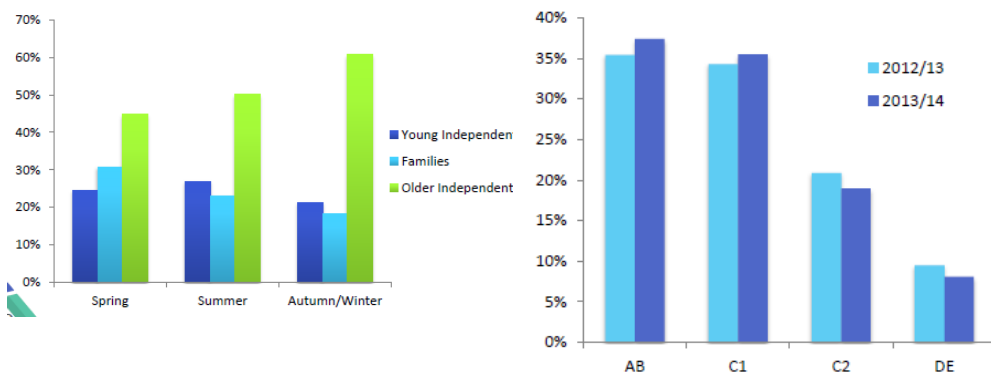


Source: Great Britain Tourism Survey 2014

There are also about 330,000 trips by overseas visitors to Cornwall[16], a number that has remained broadly constant for the past 10 years.

The Cornwall Visitor Survey 2013-4[17] shows that most visitors had been to Cornwall before and many are regular visitors. Only 13% of visitors surveyed in 2014 had not been to the county before. 59% of those surveyed in 2014 had been there the previous year. It also shows that "Older Independents"[18] made up more than half of visitors surveyed[19].

Figure 86: Nature of visitors interviewed (left) and socio-economic status (right)

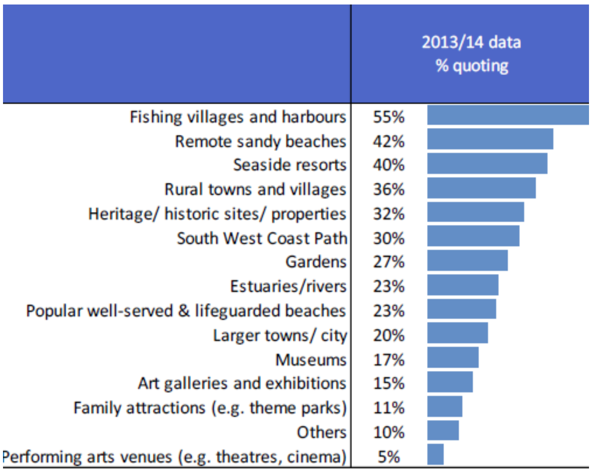


[15] 2014 is the latest year for which results are available.
[16] Source: International Passenger Survey
[17] Arkenford for Visit Cornwall
[18] People over the age of 45 with no children at home.
[19] 52 of those surveyed in 2013 and 60% of those surveyed in 2012.

Source: Cornwall Visitor Survey 2014

Its seaside offer is the heart of its appeal.

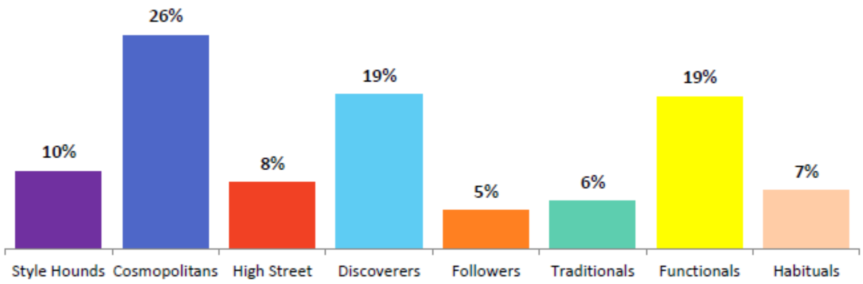
Figure 87: Attractions which visitors have been to or intend to visit



Source: Cornwall Visitor Survey 2014

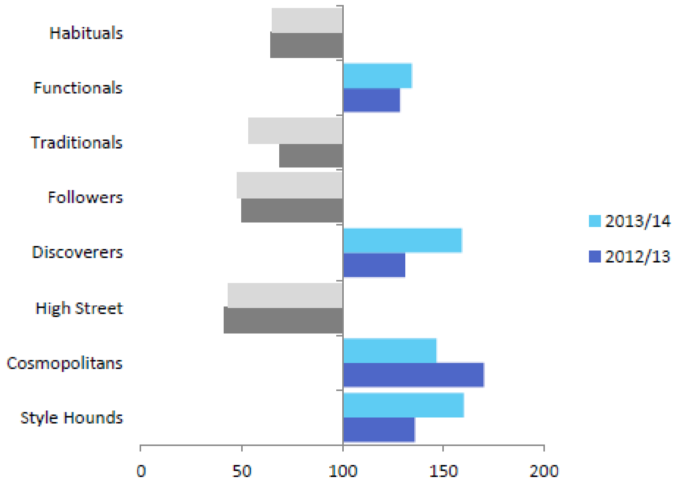
The survey profiled visitors using a segmentation model called ArkLeisure[20]. That model categorises people into one of 8 groups. Figure 88 shows the proportion of visitors surveyed in that were in each of these groups and Figure 89 shows how this compares to the profile of the population of Britain.

Figure 88: Profile of visitors to Cornwall using ArkLeisure model



[20] The model was originally developed by Arkenford Ltd on behalf of Visit Britain to provide greater insights into the nature and behaviour of tourists. Colliers have done a lot of primary research using this model for other clients and have faith in its validity.

Figure 89: Proportion of visitors in each segment compared to UK average



Source: Cornwall Visitor Survey 2014

This shows the extent to which Cornwall has appeal to people of a cosmopolitan / discoverer disposition. These are the biggest spending people. They are independently minded and sophisticated. They like a variety of different experiences on holiday including good accommodation, food and drink, opportunities for walking, and cultural experiences.

2 WELLNESS TOURISM

People have, for many centuries, travelled in pursuit of improving their health and well-being, especially in seeking out spas that offered curative waters.

There are two core dimensions of health tourism:

- **Medical tourism**: the practice of people travelling to another destination for medical treatment or surgery for a diagnosed disease or illness, or for dental or cosmetic treatment. It is curative and often involves travelling internationally.
- **Wellness tourism**: this is defined by the Global Wellness Institute (GWI) as 'travel associated with the pursuit of maintaining or enhancing one's personal wellbeing'. It is preventative and dominated in most western countries by domestic rather than international travel.

Some activities, like thalassotherapy[21], thermal baths, medical spas, DNA testing and health check-ups can be both preventative (wellness tourism) and curative (medical tourism).

Modern use of the word "wellness" dates to the work of Dr Halbert L Dunn in the United States in the 1950s and publication of his book High Level Wellness in 1961. It is now generally used to refer to harmony in mental, physical, spiritual and biological health.

The word has been increasingly used in the United States, and now in Britain, generally in the context of spas and keeping fit. It has the advantage, when applied to spas, of sounding less to do with pampering and more to do with health. This has more appeal to men, in particular.

The word has become ubiquitous in the United States, applied to many things related to health or keeping healthy.

The last decade of the 20th century saw exponential growth in health-related travel, both nationally and internationally to places and facilities such as spas, thermal springs, holistic retreats, hospitals and clinics.

The trend has continued, after a pause caused by the global financial crisis, and shows no sign of abating. Mintel reports that it now accounts for about 14% of all domestic and international tourism expenditures and is growing at about 10% a year world-wide. It reflects the rise of the new global middle class.

Wellness tourism evolved from the spa industry, but is now often treated as encompassing activities such as sport and adventure tourism, yoga and spiritual retreats, pilgrimages and visits to sacred sites, and volunteering holidays. Figure 90 has a categorisation.

[21] i.e treatment using salt water.

Figure 90: Structure of Wellness Tourism Experiences

Health: Preventative treatments with qualified health practitioners, health assessments, lifestyle change, weight loss and diet exercise regimes.
Sport / fitness: Wellness promoting experiences organised or taken alone, physical fitness, skills coaching, fitness assessments, participation in sports and sporting activities.
Adventure: Wellness experiences taken with provider or alone, physical and personal challenges, intense experiences in nature, high adrenalin travel experiences, wilderness and outdoor experiences.
Wellbeing: Wellness-promoting experiences organised or taken alone, connecting with the community or nature, beauty therapies, spas, retreats.
Transformation: Holistic wellness experiences organised or taken alone, seeking meaning in life, connection with self (retreats), connection with others (community involvement, festivals, charity events, volunteering), or spiritual connection (pilgrimages, spiritual healing).

Source: P Sheldon & R Bushell, Wellness and Tourism, Mind, Body, Spirit, Place (2009)

Mintel[22] quotes research by Hartman Group showing that consumer interest in pursuing healthier lifestyles and a higher quality of wellbeing is on the increase and that there has been a cultural shift in that consumers think about quality of life rather than just health. They give attention to non-physical elements of wellbeing (mental, emotional, and spiritual) in addition to physical dimensions.

This is likely to increase. The field of science called epigenetics is based on the belief that most disease, perhaps up to 95%, is the result of lifestyle choices and that genes respond to how they are treated. This is likely to open new avenues for testing and demonstrating to people how they can amend their lifestyles.

Wellness services to reflect this are constantly evolving. Some described in the 2016 edition of the Spa Business Handbook 2016 are:

- Clean eating, which avoids processed foods and cooking methods that create acrylamide.
- Healthy breathing.
- Diets and interventions relating to the Biome – the billions of bacteria and viruses that live synergistically in the body.
- Meditation spaces.
- Group singing, which is said to have both biological and psychological benefits.
- Aerial yoga / suspension massage, which is, in effect, yoga and massage done while hanging up-side down in a sling. It is said to take away stress pushing on the discs in the spine and hydrate them. Benefits include alleviated back pain.
- Flotation therapy.
- Diabetes testing.

[22] The Evolution of Wellness Tourism, August 2016.

CHARACTERISTICS OF WELLNESS TOURISTS

Mintel quotes research by SRI International for the Global Wellness Institute (GWI).

It divides wellness tourists into two categories according to the extent to which wellness is the motivation for their trip:

- Primary Purpose Wellness Tourists. Wellness is the sole motivating factor for their trip and destination choice. This includes consumers staying at destination spas, ashrams, yoga retreats and other dedicated wellness venues.
- Secondary Purpose Wellness Tourists. Seek to maintain their wellness or participate in wellness experiences while taking another type of trip; includes consumers booking a spa treatment during a holiday and business travellers choosing a 'healthy' hotel for its leisure facilities and nutritious menus or cruise goers using spa amenities on board ship.

Secondary Purpose tourists account for most of the market. Mintel further divides them into "Entry Level" and "Mid-Level".

Figure 91: Categories of Wellness Tourists

PERIPHERY "ENTRY LEVEL" WELLNESS TOURISM CONSUMERS (25% of wellness tourism consumers)
This group understand the importance of eating well and taking regular exercise even if they do not act on these consistently. While they may aspire to manage their health proactively, price and convenience are a priority. Over time they may become Mid-Level wellness tourism consumers with a more preventative approach to wellness. Characteristics include the following: • a reactive approach to health • exercising to lose weight • self-focus on specific health problems • aspiration to be involved in wellness but not committed • avoidance of personal care products only if they cause allergies or sensitivities • change in 'quality of life' may trigger a move to the Mid-Level segment • secondary-purpose wellness tourists
MID-LEVEL WELLNESS TOURISM CONSUMERS 62% of wellness tourism consumers
Although not as intensely committed to wellness activities as Core tourists, they are essential to the success of any trend because they form the largest segment and can select and adopt ideas. They are knowledgeable and embrace wellness tourism activities that integrate mind and body. They are most comfortable as Mid-Level wellness tourists and may remain in this section for life. • preventative approach to health • moderately involved in a wellness lifestyle • exercise for health benefits • follow wellness trends • selective about ingredients in home use and personal products • aim to eat a healthy diet with whole foods • mostly secondary-purpose wellness tourists, but may take a primary purpose wellness trip.

CORE WELLNESS TOURISM CONSUMERS 13% of wellness tourism consumers
The smallest but most proactive group, not only in mind, body and spirit, but also in terms of wider responsibilities to society and the environment, these are trendsetters and intensely involved with health and wellness. • highly preventative and holistic approach to health • innovators and trendsetters in wellness • actively involved in a wellness lifestyle • exercise for health and to achieve balance of mind, body and spirit • eat local and organic foods • environmentally aware shoppers re food sources and production • only buy eco-friendly personal products • most likely to be primary-purpose wellness tourists

Source: The Evolution of Wellness Tourism, August 2016

They estimate that there were 19 million visits in the UK in 2013 spending c.£8.5 billion, with the UK being the world's 10th largest market. They estimated that secondary wellness travellers account for 87% of wellness tourism trips and 84% of expenditures internationally. This implies that there were c.2.5 million trips annually that were "primary purpose" wellness trips.

The research found that the average expenditure by wellness tourists is higher than for other types of tourism and that the market is growing faster.

A survey in 2015[23] found that 46-55 years olds are most likely to book spa-wellness breaks, followed by 35-44 year olds. Women, travelling alone or with one or more other women, still dominate the market, but less so than in the past.

Mintel reports that men prefer a no-nonsense approach. Their choice of treatments is made prescriptively, to meet a specific goal, and is less about pampering. They want to know that the spa product or service was made specifically for them and not simply a woman's product disguised in masculine packaging. There has, as a result, been a rise in spas that offer treatments, products and entire menus designed with the male spa-goer in mind. Men are more impulsive and generally plan their spa visits with short notice.

FACILITIES

Figure 92 is research which shows that the ingredients that tourists seeking wellness most look for are the conventional features of many resorts such as beach access, swimming and access to natural beauty.

Figure 93 has a categorisation of types of spas.

[23] Spafinder Wellness 365, an online survey of 200 travel agents, 70% from North America and 30% from Europe.

Figure 92: Importance of different elements of wellness tourism

Wellness element	Baby Boomers and older	Millennials and Generation X
Beach access	8.2	8.8
Pools or swimming	8.3	8.6
Outdoor adventure programmes	7.3	8.5
Access to nature and scenic outdoors	7.9	8.4
Fitness classes and facilities	7.7	8.4
Healthy cuisine	8	8.3
Environmentally friendly	6.9	7.7
Voluntary/community help	6.6	7.4
Traditional sports like golf or tennis	7.2	7.3
Thermal or mineral springs	6.6	6.9
Weight-loss programmes	6.6	6.8
Spiritual healing	6.4	6.6
Alternative medical services	6.3	6.6
Detox programmes	6.2	6.2
Healthy sleep programmes	6	6.2
Traditional medical services	5.9	6

Note: ranked 1-10, where 1 = not at all important and 10 = extremely important

Source: Spafinder Wellness 365, 2015 State of Wellness Travel Report: Part II

Figure 93: Types of Spas

DESTINATION SPAS
Usually in areas of outstanding natural beauty with state-of-the-art facilities and offering a dedicated spa experience in which all guests participate. Destination spas focus the guest's attention on improving their physical, emotional and mental health. They provide space and time for private reflection as well as interaction with like-minded guests. They serve healthy meals and offer workshops, lectures, training and other experiences to promote long-term lifestyle habits, skills and knowledge. Many destination spas have repeat guest visitation rates of 40-50%, with guests reserving their next year's stay on check out. Guests (core wellness consumers) stay an average of 3-14 nights. Such exclusivity does not come cheap, with rates upwards of US$300 per night. In the US and increasingly in Asia, destination spas may be combined with wellness real estate. Ananda in the Indian Himalayas, Chiva Som in Thailand and Canyon Ranch in the US are world-famous destination spas.
MEDICAL SPAS
Offer supervised treatment programmes using therapeutic waters, muds and other naturally derived products with proven efficacy. Treatments are prescribed after a consultation by on-site medical doctors aided by other health-care professionals. Some exclusive medical spas like La Prairie and Grand Resort Bad Ragaz in Switzerland also provide a full range of medical specialities and procedures, including cosmetic surgery.
MINERAL SPRINGS / THALASSOTHERAPY SPAS
Provide on-site mineral/ thermal or seawater pools and facilities, which are used without medical supervision for hydrotherapy, wellness and relaxation purposes.
RESORT / HOTEL SPAS
Owned by and located within a resort or hotel, providing spa and fitness facilities and choice of body and beauty treatments. Many hotel spas have changed from offering an exclusive luxury experience to a more wellness orientated one. Some are incorporating spa and wellness not only in their spas, but also into other hotel aspects, such as aromatherapy and sleep-aid amenities in guest rooms, juices and spa menu options in restaurants, healthy snacks and beverages in business meeting rooms. Hotels are also creating new ways for guests to be active and social, such as initiating a bike-share programme or leading group runs or hikes (PFK, Trends in the Hotel Industry, 2014). Many international hotel groups have created individual spa brands, either a special spa department within the hotel or resort, or using an outside consultancy service. These include Chi the Spa (Shangri-la), Chuan Spa (Langham Hotels), eforea (Hilton Hotels and Resorts), Pure (Hyatt), So SPA (Accor Sofitel), and Willowstream Spas (Fairmont Hotels).

The Good Spa Guide identifies 5 UK spa hotels which it considers to be particularly good in terms of the overall wellness offer:

- Armathwate Hall, Cumbria – has an “advance scientific and holistic approach to wellness centred on “positive ageing” called the LIFE Regimen programme. Created by a team of doctors, nutritionists and dermatologists, the LIFE Regimen focuses on four elements – Skin, Diet, Exercise and Rest – and offers expert advice, guidance, classes and treatments”. www.armathwaite -hall.com
- Ribby Hall Village, Lancashire – “packages on offer include food allergy testing, nutritional therapy and weight-management programmes”.
- ESPA Life at Corinthia, London – “A team of naturopaths, Traditional Chinese Medicine acupuncturists and herbalists, nutritionists, personal trainers and spa professionals are on hand to tailor lifestyle programmes to suit individual needs”.
- Lifehouse Spa, Essex - “A range of wellness programmes are split into four key areas – general health and relaxation, detox, recovery and recuperation, losing weight and improving your fitness”.
- Calcot Spa, Gloucestershire.

THALASSOTHERAPY

Thalassotherapy (from the Greek word thalassa, meaning "sea") is the medical use of seawater as a form of therapy. It is based on the systematic use of seawater, seaweed, and shore climate. The properties of seawater are believed to have beneficial effects upon the pores of the skin. It involves a variety of treatments that use seawater and seaweed, each designed to cleanse, soothe and revitalise the skin and body, and, in some cases, to improve circulation and muscle tone. Other marine and ocean derivatives feature in thalassotherapy, too, including algae, mud and sand. Thalassotherapy comes in various forms, and encompasses hydrotherapy, such as mineral-rich showers, seawater pools, and hydro-massage, and algotherapy, such as seaweed, algae or mud baths and wraps. Marine extracts can also be found in products used for facials, manicures and pedicures.

There are quite a few thalassotherapy resorts on the continent, but none that we are aware of in the UK. www.vilalararesort.com is an example from Spain.

3 HOTELS

Figure 94 shows that most development of hotels in the UK in recent times has been in the branded sector, especially in the budget sector, which accounts for about 58,000 of the 64,000 net increase in rooms in the branded segment since 2007. This has been driven largely by the expansion of budget hotel chains like Premier Inn and Travelodge.

Figure 94: Estimated growth in the number of hotel rooms, 2007-15

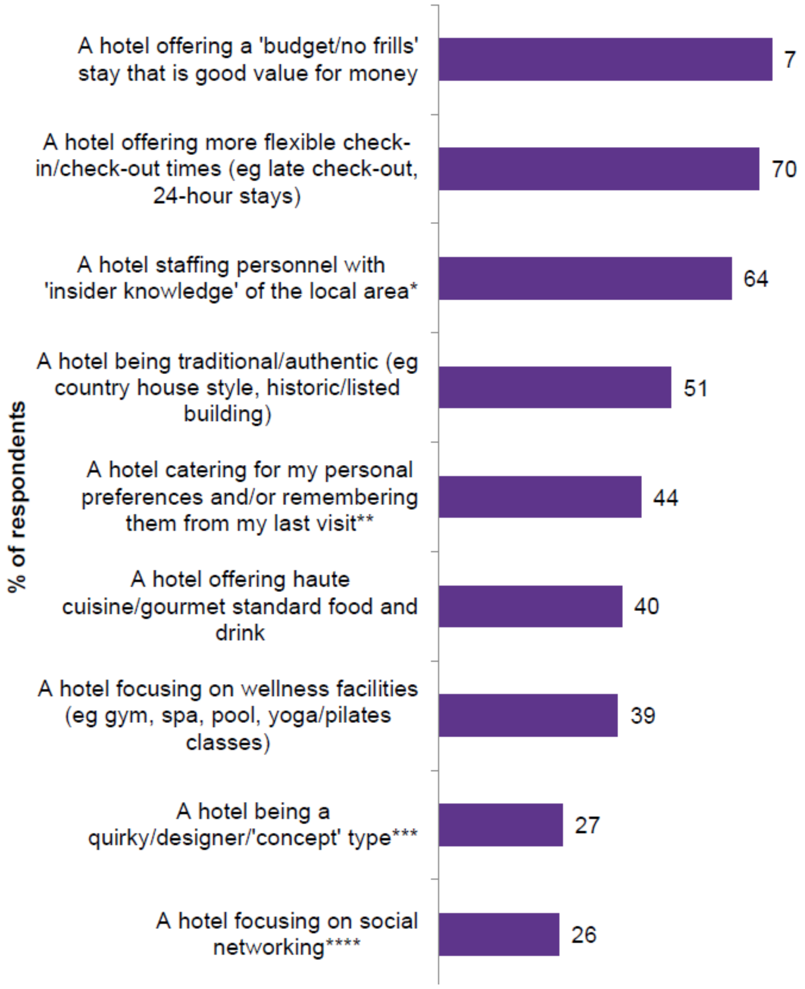
	2007	2010	2013	2015	% change 2007-15
Full service	98,281	101,987	105,125	103,172	+5.0
Mid-market	88,195	72,029	82,495	88,974	+0.9
Branded budget	86,730	115,196	130,100	144,691	+66.8
Estimated corporate branded supply	273,206	289,212	317,720	336,837	+23.3
Independent/consortia	443,299	439,469	412,280	409,913	-7.5
Total estimated serviced accommodation	716,505	728,681	730,000	746,750	+4.2

Source: Melvin Gold Consulting / Mintel Hotels UK Nov 2016

This has been a long-term trend, following the pattern in the United States. Most hotels in cities and larger towns are now branded. The independent sector still dominates in terms of number of establishments and rooms in rural areas, but has not expanded much for several decades. The overall market share of the branded hotel segment increased from 38% of all hotel rooms in 2007 to 45% in 2015.

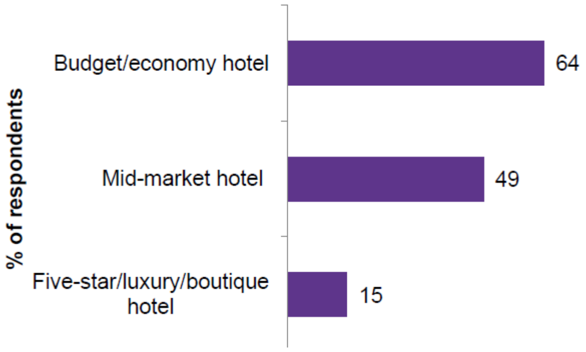
Figure 95 shows that the budget chains have been able to tap into consumer demand for accommodation that offers convenience and good value for money. There is substantial demand, however, for hotels which offer high standards of food and drink and wellness facilities.

Figure 95: To what extent are the following factors important in choosing a hotel to use in the UK?



Base: 1,164 internet users aged 16+ who have stayed at hotels in the UK in the past 12 months. Source: Lightspeed / Mintel

Figure 96: Which of the following types of hotel in Britain have you stayed in over the past year?



Source: Mintel, Hotels UK Nov 2016

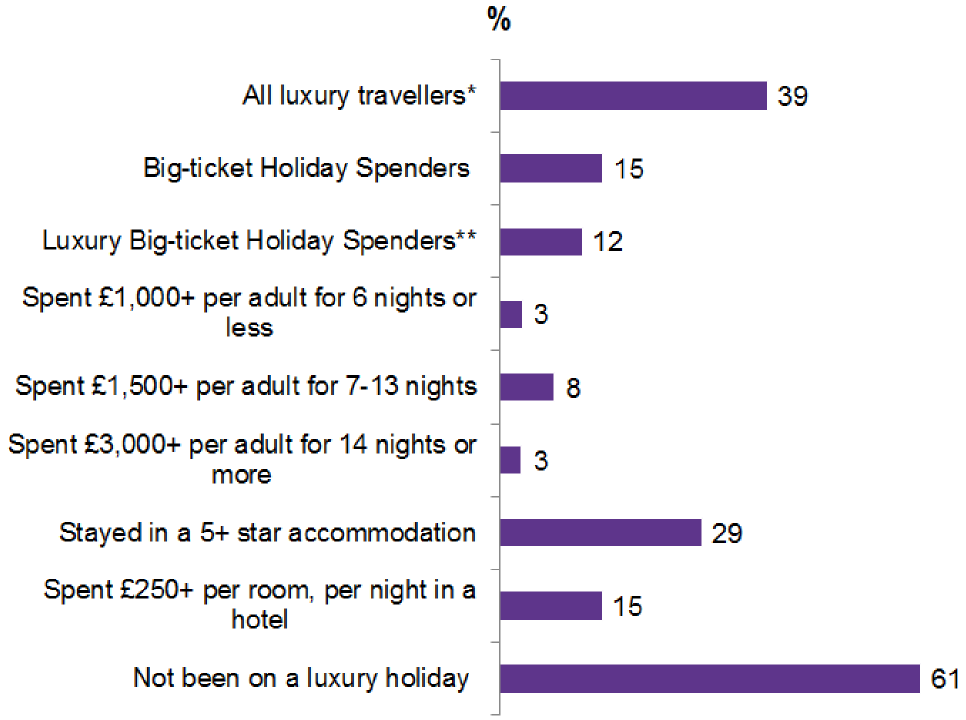
There is considerable innovation taking place in the boutique, lifestyle and themed sectors. Lifestyle brands combine the ethos of budget hotels in terms of low cost construction and management, with a more distinctive and individualistic ambience. Examples are Marriott's Moxy, Hilton's Tru Hotels and Canopy, and Dutch chain Citizen M. Best Western, the marketing consortium, has introduced boutique concepts Vib and Glo. Accor announced the launch of a new youth hostel brand Jo&Joe, aimed at young adults and intended to be a response to the challenge of Airbnb. Alton Towers is set to open a CBeebies-themed hotel in 2017. This is said to be Britain's first hotel designed exclusively for young families.

There are boutique brands in the United States, operating in the middle of the market, that have a particular focus on wellness. Even Hotels (part of International Hotel Group) www.ihg.com/evenhotels and Element Hotels (part of Starwoods) are examples www.starwoodhotels.com/element

4 LUXURY TRAVEL

Mintel recently produced a report on the luxury travel market in the UK[24]. They defined 39% of all holiday makers as being "luxury travellers" as a result of having reported at least one expensive trip over the past 5 years, and defined 15% of all holiday makers as being "Big-Ticket Holiday Spenders[25], of which most (12% of all holiday makers) are classed as Luxury Big-ticket Holiday Spenders – those that have spent over £1,000 per person on their most expensive holiday and had at least one luxury element / service (e.g. spa, private pools etc.) on their trip.

Figure 97: % of UK Holidaymakers undertaking different types of holiday

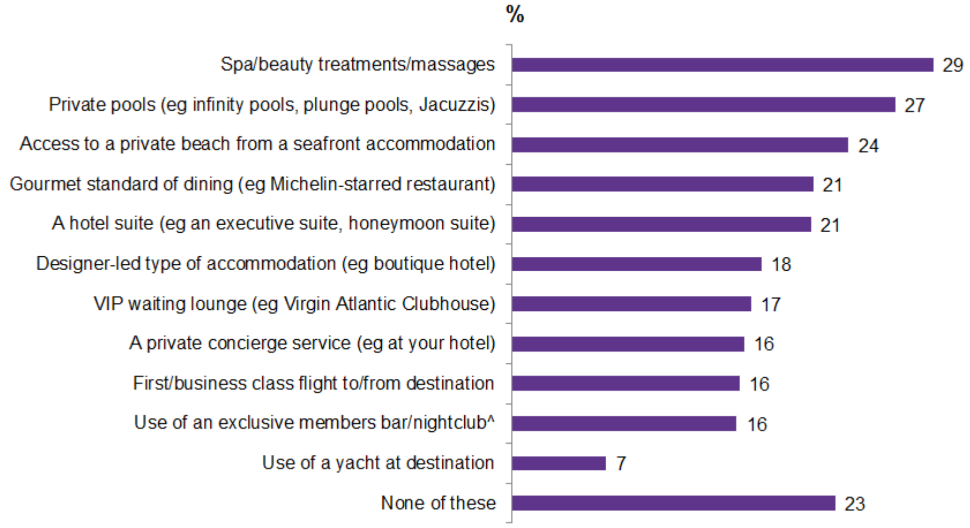


Source: Luxury Travel UK, Mintel 2016.

1,635 people defined as "luxury travellers" (i.e. representing 39% of all holiday makers") were asked about features of their holidays. Spa related activities were most mentioned.

[24] Luxury Travel UK, November 2016.
[25] Those who have spent over £1,000 per person on a holiday in the past 5 years.

Figure 98: "Which, if any, of the following elements were present in the most expensive holiday you've been on over the past 5 years?"



Mintel's research identifies older Millennials (25-34s) as being the most likely to have spent over £1,000 on their most expensive holiday (40% have compared to an average of 32%). In addition, some 23% of 25-34s spent over £1,500, compared to an overall average of 17%.

Consumers living in Inner and Greater London spend the most on holidays; 44% have spent over £1,000 compared to an overall average of 32%. Moreover, 26% of Londoners spent over £1,500 compared to an average of 17%.

The UK high-new-worth-individual (HNWI) population is about 550,000, according to a study entitled World Wealth Report 2016 by Capgemini. It puts the UK in fifth place behind the US, Japan, Germany and China in terms of HNWI population.

More than half of the UK's HNWIs live in London. A 2015 study entitled The Wealth Report 10th Edition by Knight Frank concluded that there were some 376,000 Dollar millionaires ($1 million-plus), 12,730 multi-millionaires ($10 million-plus) and 4,905 ultra-high-net-worth individuals ($30 million-plus) in London.

Luxury travel seems to have returned to a strong growth pattern with the recovery of the economy. According to the CLIA (Cruise Lines International Association) UK & Ireland, for example, ultra-luxury cruise passenger numbers increased by 10.7% to 26,602 in the five years to 2015 and are now 6% higher than the 2008 peak.

5 FAMILY HOLIDAYS

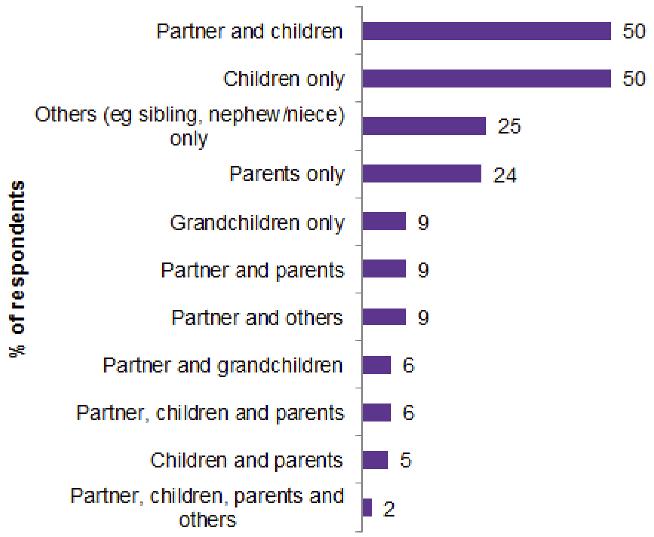
5.1 MARKET SUMMARY

Mintel estimates that about 33.8 million family holidays were taken during 2015, with an estimated spend of £13.1 billion (excluding overseas transport costs). This accounts for around a third of the total holiday market by volume and value. Some 19.3 million family holidays were taken in the UK and 14.5 million abroad.

There were an estimated 10.6 million 1-3 night breaks and 8.7 million 4+ night trips taken by families within the UK in 2015. Short breaks therefore accounted for just over half (55%) of domestic family holidays, compared to around two thirds in the domestic holiday market overall. This is because families, on average, are more likely than other demographic groups to take longer holidays within the UK.

As Figure 99 shows, family holidays do not necessarily simply involve parents and children. Half of family holidaymakers have taken breaks with children only over the past three years (i.e. without a partner); one in three family holidaymakers over the age of 55 have taken breaks just with their grandchildren; and over a fifth of all holidaymakers aged 25-34 still go away with parents – part of the so-called 'Boomerang Generation' of younger adults who are staying in the family home for longer. ONS data shows that one in four of those with dependent children in the UK are single parents. Mintel's research shows that 41% of separated, divorced or widowed holidaymakers have been away with children in the past three years.

Figure 99: "We are now going to show you some groups formed by the members of your family that you said you travelled with. For each, please indicate if it represents one you have been on holiday with in the last 3 years".



Source: Mintel Family Holidays UK, March 2016. 1,042 internet users aged 16+ who have been on family holidays in the last 3 years

Previous increases in birth rates are producing a demographic boost for the overall family holiday market, with an expected 6% rise in the number of children aged under-15 between 2015 and 2020.

The largest increase of 12% is expected to occur among those aged 10-14. However, the number of older teenagers in the population is expected to decline slightly by 3%. The over-55s population is also projected to grow by 10% between 2015 and 2020, with further rises thereafter as the population continues to age.

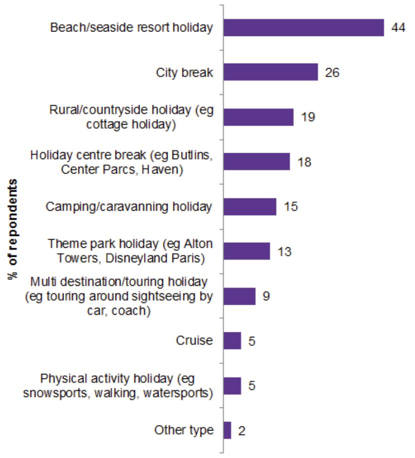
Figure 100: Demographic changes

	2010		2015		2020 (proj)		% change	% change
	000s	%	000s	%	000s	%	2010-15	2015-20
Male:								
0-4	**1,977**	**3.2**	**2,133**	**3.3**	**2,137**	**3.2**	**+7.9**	**+0.2**
5-9	**1,762**	**2.8**	**1,981**	**3.1**	**2,135**	**3.2**	**+12.4**	**+7.8**
10-14	**1,825**	**2.9**	**1,767**	**2.7**	**1,985**	**3.0**	**-3.2**	**+12.3**
15-19	2,013	3.2	1,863	2.9	1,803	2.7	-7.5	-3.2
20-24	2,213	3.6	2,197	3.4	2,038	3.0	-0.7	-7.2
25-34	4,128	6.6	4,671	7.2	4,869	7.2	+13.2	+4.2
35-44	4,378	7.0	4,063	6.3	4,246	6.3	-7.2	+4.5
45-54	4,215	6.8	4,489	6.9	4,291	6.4	+6.5	-4.4
55-64	3,599	5.8	3,590	5.5	4,003	6.0	-0.3	+11.5
65+	4,533	7.3	5,251	8.1	5,773	8.6	+15.8	+9.9
Total male	**30,643**	**49.2**	**32,005**	**49.4**	**33,280**	**49.5**	**+4.4**	**+4.0**
Female:								
0-4	**1,881**	**3.0**	**2,031**	**3.1**	**2,035**	**3.0**	**+8.0**	**+0.2**
5-9	**1,685**	**2.7**	**1,891**	**2.9**	**2,039**	**3.0**	**+12.2**	**+7.8**
10-14	**1,742**	**2.8**	**1,694**	**2.6**	**1,899**	**2.8**	**-2.8**	**+12.1**
15-19	1,899	3.1	1,781	2.7	1,731	2.6	-6.2	-2.8
20-24	2,097	3.4	2,092	3.2	1,963	2.9	-0.2	-6.2
25-34	4,013	6.4	4,419	6.8	4,582	6.8	+10.1	+3.7
35-44	4,456	7.2	4,078	6.3	4,121	6.1	-8.5	+1.1
45-54	4,332	7.0	4,634	7.2	4,436	6.6	+7.0	-4.3
55-64	3,743	6.0	3,751	5.8	4,192	6.2	+0.2	+11.8
65+	5,771	9.3	6,401	9.9	6,894	10.3	+10.9	+7.7
Total female	**31,619**	**50.8**	**32,772**	**50.6**	**33,892**	**50.5**	**+3.6**	**+3.4**
All	**62,262**	**100.0**	**64,777**	**100.0**	**67,172**	**100.0**	**+4.0**	**+3.7**

Source: ONS

Figure 101 shows that seaside holidays remain most attractive to families.

Figure 101: Which of the following types of holiday best describe the one(s) you took with your family in the last 3 years?"

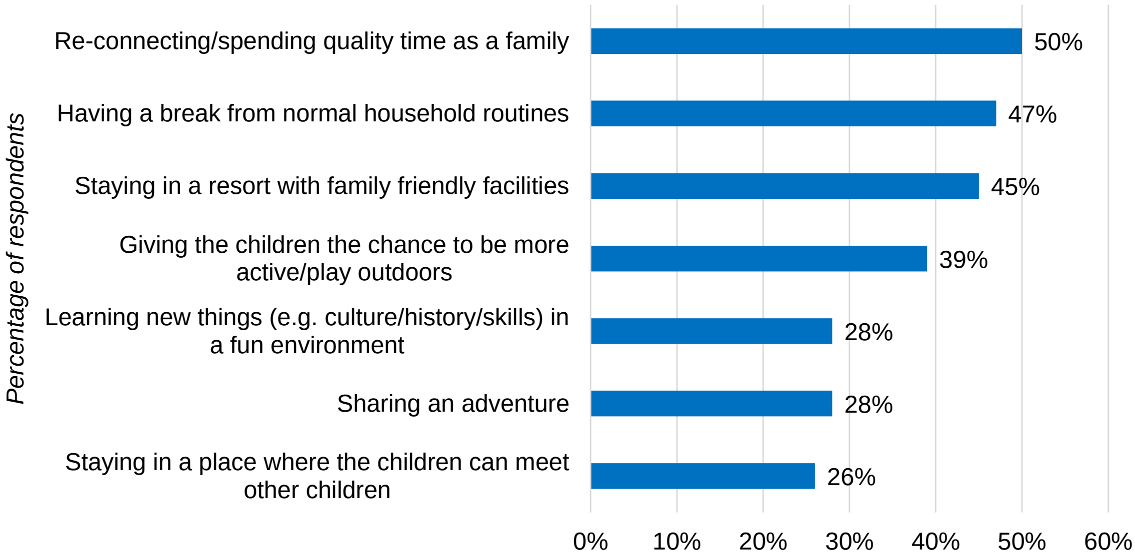


Source: Mintel Family Holidays UK, March 2016

5.2 HOLIDAY PARKS / RESORTS

There are many resorts in the UK and abroad that provide self-catering in static caravans or chalets. They typically aim at the family market, providing an affordable offer that fulfil the desire of parents for places where their kids can be kept occupied in a safe manner.

Figure 102: Most important factors for parents in a family holiday (Nov 2015)



Source: Mintel – Family Holidays UK.
Sample of 496 parents with children under 18 years old.

Figure 104 shows the proportion of the UK population that say they have experienced different forms of camping and caravanning over the past 3 years.

Figure 103 shows the number of trips this represents. About 13%, c.3.6 million trips are people saying they have rented a static caravan. The number of those trips has fallen about 9% since 2011.

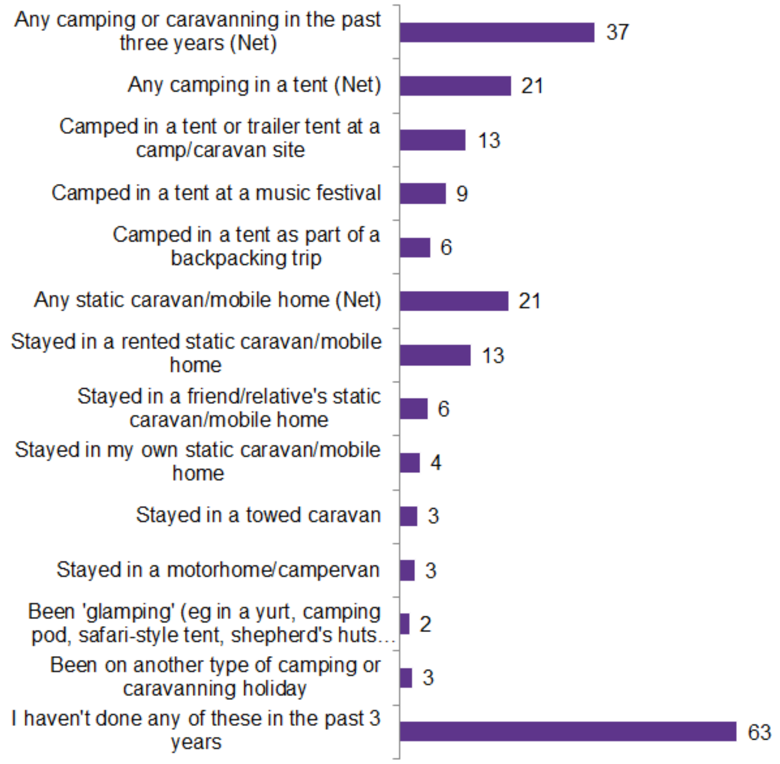
Figure 103: Number of camping and caravanning holidays by type

	Touring caravan m	Static (not owned) m	Static (owned) m	Camping m	Total m
2011	4.48	3.97	3.47	5.04	16.93
2012	4.20	4.24	3.33	4.14	15.88
2013	4.41	3.56	3.12	4.76	15.84
2014	4.11	3.38	3.56	3.92	14.91
2015	4.24	3.62	3.19	4.38	15.39
% change 2011-15	**-5.4**	**-8.8**	**-8.1**	**-13.1**	**-9.1**

Source: Great Britain Tourism Survey / Mintel

Statics have a clear proposition, seen as being family-friendly, comfortable and economical.

Figure 104: Thinking of camping and caravanning holidays, which of the following, if any, have you done in the past three years



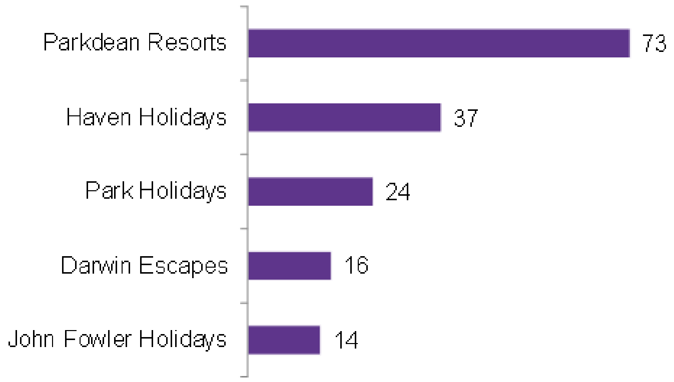
Source: Mintel, Camping and Caravanning UK, April 2016

The Great Britain Tourism Survey estimates that the average spend per person per trip for those using static caravans is about £230.

The British Holiday & Home Parks Association (BH&HPA) estimates there are around 4,000 holiday parks in Britain, with approximately 530,000 pitches.

A clear market leader, in the form of Parkdean Resorts, emerged in 2015 from the merger of Park Resorts (49 sites) and Parkdean (24 sites).

Figure 105: Leading UK Holiday Park Operators, by number of sites



Source: Mintel, Camping and Caravanning UK, April 2016

Parkdean Resorts is 45% owned by Electra Price Equity, with the balance held by the management team and other shareholders. The combined annual turnover is about £320 million (i.e. c.£4.4 million per resort on average).

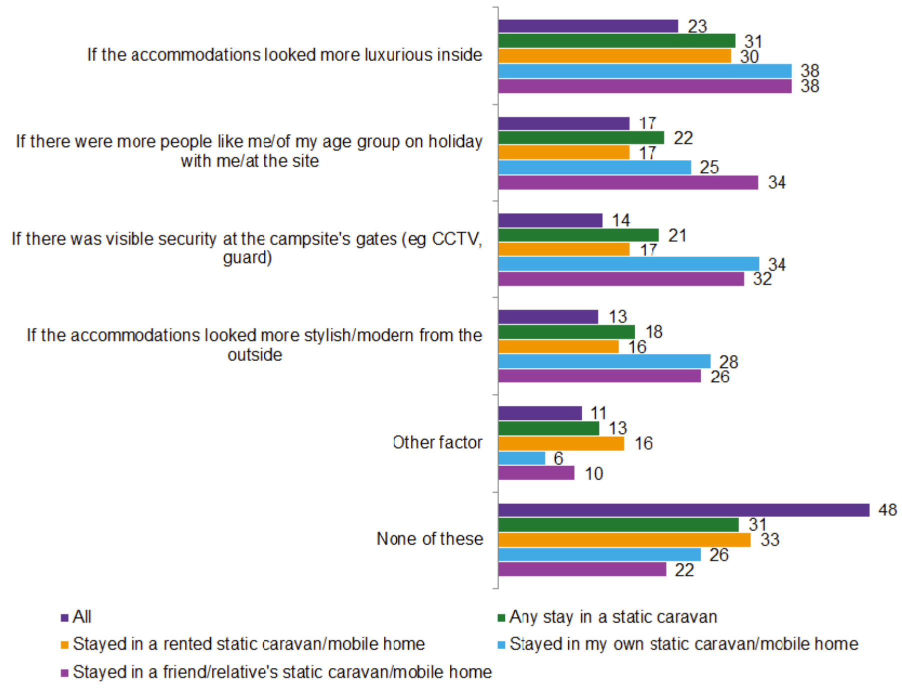
The clear number two, by sites operated, is Haven Holidays, which is part of Bourne Leisure (turnover c.£155 million), followed by Park Holidays, whose parent company is Caledonia Investments plc (turnover c.£100 million).

Park Holidays signalled its intention, in January 2016, to focus on the rising popularity of lodges as second homes (rather than for the rental market) by rolling that model out at more than half of its estate for the 2016 season. It is a feature of the way that operators like Haven Holidays work also.

There are several marketing agents that let out accommodation at independently owned parks. The largest of these is Hoseasons, part of Wyndham Vacation Rentals (UK), itself a subsidiary of Wyndham Worldwide, which represents over 300 parks, including Black Rock.

Figure 106 shows that perception that caravans are more luxurious is the factor that is most quoted as likely to persuade people to take a holiday in a static caravan, although perception that there would not be like-minded people there also seems to be a big barrier to visits.

Figure 106: "Which, if any, of the following factors would encourage you to go or go more often on holiday in a static caravan / mobile home?



Source: Survey of 1,532 internet users age 16+ who have been on, or shown interest in going on, a camping / caravanning holiday. Lightspeed GMI / Mintel

Operators have been responding to this by introducing a more up market offer and switching from static caravans to chalets.

Haven's Thornwick Bay Holiday Park is representative of the trend, taking them closer to the positioning of the likes of Centre Parcs. It reopened in March 2016 after a £10 million refurbishment. The centrepiece is a large indoor pool with slides. There is also a play barn. It has a strong focus on outdoor activities for children and families to encourage them to connect with nature. The park's Nature Rockz programme includes activities such as bug hunt safaris, shelter building, fire lighting, pond dipping, fossil casting and guided cave explorations. Families can also take a guided boat tour with local fishermen.

Forest Holidays (part-owned by the Forestry Commission) operates 8 sites offering luxury cabins and leisure activities in a woodland setting which are very successful. www.forestholidays.co.uk

A next step up from parks like Thornwick Park are resorts like Butlins and Centre Parcs, which are on a larger scale. Centre Parcs has been particularly effective in attracting a middle-class market. Their concept has strong appeal to its core market because it promises a safe and peaceful environment where families can spend time together and take part in leisure activities away from home. Center Parcs is relatively expensive to stay at, but has developed a strong reputation and a loyal customer base. 60% of guests return every 3 years. It reports occupancy of about 97% with average daily rate per lodge night of about £150.

6 CASE STUDY-AMERSFOORT

The pictures give an idea of the quality of built environment that is the norm in Dutch towns and in other towns and cities across the continent.

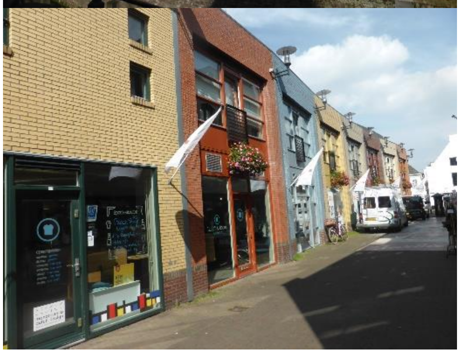







NOVI ARTE


KFC



7 CASE STUDY-MARGATE

Margate was suffering from classic symptoms of declining sea side holiday tourism. Its central area was amongst the most deprived wards in the country; its main attraction, Dreamland, had closed; its remaining hotels and bed and breakfasts were old fashioned and catering almost exclusively to retired people on tight budgets.

Kent County Council and Thanet District Council decided to address this by repositioning the town. There were three main elements to this.

The first was construction of Turner Contemporary art gallery. It exploited the fact that Turner regularly painted in the town, but did not have other connection to him. It is a contemporary art museum that, largely, displays exhibitions that are put on elsewhere. It cost £19 million, which was funded by Kent County Council, Arts Council England, and European Regeneration funding. It was designed by David Chipperfield, who has since gone on to be famous as an architect of cultural buildings. It receives a revenue subsidy of c.£250,000 per annum from each of Arts Council England and Kent County Council.

The second element of the strategy was townscape improvement work on the seafront and adjoining old town, where there were many small shops, most vacant.

The third was restoration of Dreamland to be the world's first heritage amusement park. The seed funding for that was provided by the Heritage Lottery Fund and a government programme for regeneration of resorts called Sea Changes.

The strategy has been highly successful. Turner Contemporary has attracted about 250,000 visitors per annum. The Old Town has developed a niche as a destination for vintage clothing. It also has a large range of bars, cafés and restaurants, a craft brewery and a top-notch boutique hotel.

The reputation of Margate has changed so much that it now has an influx of people wanting to relocate out of there from London. A venture capital fund has taken over Dreamland and invested a large amount, making that initiative an outstanding success also.

Figure 107: Images of Margate Old Town

8 REVITALISED MARKETS

8.1 FOOD-ORIENTATED MARKETS

A striking trend of recent years, across many countries of Northern Europe and North America, has been revival of food markets, both indoors and outdoors.

Colliers recently produced a city centre strategy for Cork (Ireland). The English Market there, which is largely food, thrives. There are no vacant units. It is Cork's main tourist attraction. We have come across thriving, recently built, modern food markets in places like Gothenburg, Rotterdam, Oslo, Hannover, Cape Town, Toronto and the small city of Uppsala in Sweden. They typically occupy restored buildings like Tram Sheds (e.g. Uppsala and Gothenburg) and warehouses (e.g. Cape Town). Borough Market in London, famously, goes from strength to strength and has had great regenerative impact in Southwark. It is, arguably, the most successful destination in London.

The difference between old style food markets and the new generation of food markets is that the new version is as much about eating on site – both formally and informally - as they are about buying food for use at home. This can be seen in the pictures below of the indoor food market in Hannover. They also increasingly focus on locally produced produce, responding to consumer demand to know the provenance of the food they eat and for a more experiential retail experience. They typically offer the option to informally eat and drink from stalls or from one or more formal waiter-service restaurants.

Figure 108: Food Market in Hannover, Germany

8.2 ALTRINCHAM MARKET HOUSE

This is the most imaginative and successful repositioning of an indoor market that we know of in the UK. Altrincham is an affluent commuter town in north east Cheshire but, because there are other major retail centres, like the Trafford Centre, within easy reach, the number of people shopping there regularly is lower than might be anticipated and the town centre has needed revitalisation.

The market hall is a grade II listed Victorian structure, constructed in 1870. There is an outdoor “covered market”, under canvas, adjoining it. It was suffering from “drabness” characteristic of traditional indoor markets before Trafford Council put the operation out to tender prior to refurbishment. Nick Johnson, an entrepreneur, won the tender. He put £200,000 into the venture. Trafford Council contributed £500,000. He was, from 1995 to 2012, deputy chief executive of Urban Splash, the Manchester-based property developer renowned for turning large disused buildings around the UK into luxury apartments and workspaces, and for their imaginative approach. He manages the market with assistance of his partner.

Figure 109: Altrincham Market House

The market hall was refurbished to create a food hall emporium. It is now a warm and inviting open space, with wooden stalls around the periphery housing food and drink providers. Large wooden tables and chairs fill the central space.

Figure 110: Operators in the Food Hall

- Reserve Wines – a wine shop and bar that sells wine by the glass at the same price as for bottles that people can take away.
- Honest Crust – pizzeria using sourdough base that is fermented and proved for at least 36 hours before being stretched by hand and blasted in a 450 C wood-fired oven.
- Little Window - serves flatbreads, with toppings ranging from deep-fried halloumi and pickles to slow-cooked lamb and marinated chicken. Brunch menu.
- Tender Cow – steak house serving grass-fed, rare breed steaks in rolls and as burgers.
- Wolfhouse - specialises in Asian-inspired dishes such as ramen noodle soups and Taiwanese steamed bao buns. Also cakes, brownies, and doughnuts.
- Sam Joseph – artisan chocolatier and patisserie.
- Great North Pie Company – gourmet pies.
- Jack in the Box – craft beers for takeaway and on tap.
- Market House Coffee – coffee made from historic coffee roasterie and tea merchant J Atkinson and Co of Lancaster.

Figure 111: Specialist markets at Altrincham

Day / Theme	Traders
WEEKLY	
Tuesday: Fresh, quality, local produce | Shopping | Tuesday Club	Fresh meat, fish, fruit, vegetables, herbs, spices, bread, pate, sauces, cream, yoghurt, cheese, eggs, honey, pate, teas, coffee, homemade cakes & biscuits, pickles & preserves, freshly made smoothies, fresh flowers & plants. Traditional fresh food stalls. Regular stall holders from weekend markets including handmade jewellery, clothing & fashion accessories, homeware, skincare, bespoke lighting, designer tableware, local artwork & photography, beeswax candles, upcycled gifts & homeware.
Thursday: Thrift & Antiques | Fresh Fish.	Vintage books, stamps, vinyl, toys, music memorabilia, post cards, military history, jewellery, ceramics, glass, antiques, clothing. In-house fish mongers 'Taylor's Fish'.
Friday: Fresh, quality, local produce	Fresh fish, fruit, vegetables, herbs, spices, cheese & eggs. Farmers & flowers market every 1st Friday of the month.
Saturday: Trad-Mod Market	Quality food traders, crafters, jewellers, vintage retailers.
Sunday: Design / Food / Vintage / Craft	A different selection of traders each weekend. Christmas Market (Nov 14-Dec 29).
MONTHLY	
1st Weekend	Design
2nd Weekend	Food
3rd Weekend	Vintage
4th Weekend	Craft

The adjacent covered market is largely unchanged in physical terms, although new canopies and lighting have been added.

The traders are different, however. They have been ruthlessly "curated" by the operators to achieve a mix and consistency of quality that they aspired to.

Market House opens 9am - 10 pm Tuesday to Saturday, 9am - 6pm on Sundays. It closes on Mondays. It is so popular that customers are turned away at busy times. Its Facebook site shows visitation by hour. It is busiest in the evenings every day except Saturdays, when lunch is the busiest time but the hall remains very busy continuously from mid-morning to closing. Friday evening is peak time.

There are 599 reviews on Trip Advisor, which is much in excess of any other market that we have examined. 58% are excellent, 28% are very good, 8% are average, 3% are poor and 3% are terrible.

Bad reviews are commonly about problems caused by pressure of numbers, including not being able to make bookings, although some regret the passing of the old type of market.

A measure of the panache and confidence of the offer is that bad reviews are framed and displayed.

8.3 KINGSTON ANCIENT MARKET

This is an interesting example of successfully converting a historic traditional outdoor market to a food market.

Kingston on Thames has two town markets. The 'Monday Market' is a value-driven market in the former Cattle Market (now a car park) which is currently managed by Kingston First BID[26] on behalf of the council.

Kingston Ancient Market occupies the historic town square. There has been a market there since 1170. The market, including public realm, was recently refurbished to high standard by Kingston Council, paid for from £1 million of their own funds and a £2 million grant from the Mayor of London's High Street Fund. New permanent wooden kiosks provide stall space, storage, and limited prep area. They provide a better working environment and open up views of the grade II* listed Market House building. The stalls incorporate a "glowing orchard" artwork feature which illuminate them when they are closed and help bring vibrancy to the market place in the evening. A creative solution to waste disposal enabled unsightly waste storage facilities behind the old market stalls to be removed. New gas, electricity and water supplies were provided, and drainage was improved.

[26] Business Improvement District.

Figure 112: Kingston Ancient Market

The market has been repositioned to focus on food and, especially, “international hot food”. It is particularly popular with office workers during the warmer months. They take advantage of sea-front style seating around the market. It opens every day 9 am – 6 pm. There are 29 fixed and 6 temporary gazebo-style stalls.

Four long standing traders were not offered pitches in the new market because they did not serve food. The traders claimed it was because they were not up-market enough. This caused a degree of local controversy.

8.4 LEVENSHULME

This is an example of a thriving artisan market.

Levenshulme Market, in south Manchester, was established in 2013 as a social enterprise, partly with the objective of reviving the nearby high street. It takes place in a station car park.

It started as a monthly market, but was so popular that it went weekly in 2014. It now has 50 stalls occupied by “artisans” selling street food, produce, plants, gifts, vintage clothing and homewares.

Figure 113: Levenshulme Market

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