
Visit Jersey

PRODUCT ASSESSMENT – FINAL
SEPTEMBER 2022

PREPARED FOR VISIT JERSEY

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Table of Contents

1	Introduction	5
2	Executive Summary	7
2.1	Overview	7
2.2	Summary of Opportunities	11
3	Accommodation	12
3.1	Hotels	12
3.2	Guest Houses	19
3.3	Hostels	20
3.4	Self-Catering	20
4	Activities	24
4.1	Attractions Overview	24
4.2	Arts	25
4.3	Beaches	27
4.4	Casinos	27
4.5	Event Spaces	27
4.6	Events	30
4.7	Family-Orientated	33
4.8	Food and Drink	33
4.9	Gardens	36
4.10	Heritage	37
4.11	Outdoors	40
4.12	Public Realm	46
4.13	Retail	46
4.14	Weather	49
5	Access	51
5.1	Air	51
5.2	Ferry	52
5.3	Cruise	53
5.4	Yachts	53
5.5	Parking	54
5.6	Visitor information	54
5.7	On Island Transport	55
6	Specific Opportunities	57
6.1	Claude Cahun Gallery	57
6.2	Fort Regent	57
6.3	Prehistoric Heritage	58
7	Comparisons	59
7.1	Accommodation	60
7.2	Attractions	63

7.3	Eating and Drinking	65
7.4	Events	66
8	Product Sectors	67
8.1	History & Heritage	67
8.2	Arts & Culture	69
8.3	Food Tourism	71
8.4	Sustainable Tourism	72
8.5	Nature/ Wildlife / The Great Outdoors	74
8.6	Destination Hotels	78
8.7	Events to Drive Visitation in the Shoulder Seasons	82
9	Conclusions	83
9.1	Access	83
9.2	Serviced Accommodation	83
9.3	Self-Catering Accommodation	85
9.4	Wellness	86
9.5	Attractions	86
9.6	Event Spaces	88
9.7	Events	88
9.8	Sports	89
9.9	Retail	89
9.10	Townscape / Public Realm	89
9.11	Development Funding	90
9.12	Making Experiences Bookable	91

1 Introduction

The main aim of this work is to produce a 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 helping deliver sustainable growth for the island's tourism sector.

It will provide the evidence base for a more detailed strategy and plan for improving the tourism product on the island.

It will also assist in identifying product that can be featured in marketing. Visit Jersey adopted a new system for segmenting potential visitors in 2021, using primary research undertaken with tourists in the UK, France and Germany. It identified four target segments: "Authentic Adventurers", "Culture Chasers", "Easy Explorers" and "Moment Makers".

Colliers did similar studies in 2017 and, in less depth, in 2006¹.

It is not, as we pointed out on the previous occasions, 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 and restaurants, and those businesses often play an important role in attracting visitors, though local people may be their main source of revenue.

Other dimensions that are ultimately 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 no evidence from the 2022 research of substantial change in the product offer since 2017.

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

There may have been substantial changes in market conditions as a result of the pandemic and circumstances afterwards, but it is too early to be sure. Leisure tourism seems to have returned broadly to normal. Corporate business and MICE² tourism seems to be most under threat from changed behaviour caused by greater use of online meetings, but business visits have recovered well in Jersey throughout the first half of 2022, to over three quarters of the levels seen during the same period in 2019. It will probably take several years to determine if there has been a profound change in behaviour affecting the market.

Some of our conclusions are, therefore, unchanged from what they were in 2017. They have been repeated so that the assessment is comprehensive.

This report is accompanied by spreadsheets that have detailed lists of organisations / facilities involved in providing services to tourists.

The report includes comparisons with Cornwall, South Lakeland and Bath and examples from other places to illustrate what might be done in Jersey.

Most of the work was desk research. Interviews were done with Visit Jersey staff and a selection of external stakeholders with the objective of achieving insights. They are all thanked for their time.

Figure 1: External stakeholders interviewed

Andrew Jones, Regulation Officer, Government of Jersey
 Claire Boscq, CEO, Jersey Hospitality Association
 Connor Burgher, Town Centre Manager, St Helier
 Gavin Breeze, Owner, Evie Bike
 Ian Clarkson, Sector Lead - Retail and Visitor Economy, Government of Jersey
 James Tilley, Head of Sport and Children, Jersey Sport
 John Garton, CEO, Genuine Jersey
 Jon Carter, Chief Executive, Jersey Heritage
 Kim Galbraith, Maritime Hub Manager
 Matt Thomas, CEO, Ports of Jersey - Airport
 Robert Mackenzie, Managing Director, Channel Islands Travel Group
 Simon Gasston, Delta Events
 Simon Soar, Head of Hospitality and Tourism, Jersey Business

² Meetings, Incentives, Conferences and Exhibitions.

2 Executive Summary

2.1 Overview

Jersey has a distinctive tourism product, different from anywhere else.

Some aspects of this are obvious but others, especially the nature of the accommodation offer, are less so.

Jersey is different from most other holiday destinations in the UK and on the continent in that it has very little self-catering visitor accommodation. Most of its tourist accommodation is hotels. This puts it at a disadvantage, especially in attracting longer-stay and family holidays. There has been a long term trend, over several decades now, towards self-catering for longer holidays.

It would be sensible to prioritise increasing the amount of self-catering, but opportunities to do so are likely to be limited because of shortage of suitable sites and competition from residential. This means that, in practice, there is little choice but to focus most effort to promoting the island to people who want to stay in hotels.

The amount of hotel stock continues to reduce at a fast pace. There has been a net reduction of 13% of rooms since 2017. There is concern that this will result in fewer tourist arrivals, which could have knock-on effects on, especially, the viability of transport connections to the island.

The loss of hotel accommodation has been in the 2* and 3* sectors, at the economy end of the market. It reflects changing market conditions which makes that type of accommodation no longer viable, especially when compared to the alternative of converting the property to residential. Most are probably not suited to upgrading by virtue of the nature of the building and / or the nature of the location.

There are exceptions. The Millbrook House Hotel, for example, is currently being refurbished at high cost and seems likely to become a destination hotel with a different character to any other on the island. The Moorings and St Brelade's Bay Hotel have recently had major refurbishments. Other older properties are likely to be suited to substantial upgrades. In addition, plans have also been submitted for the development of a Wilde Aparthotel by Staycity in St. Helier, with 103 rooms.

The situation is similar in places like the Lake District.

There have been benefits to losing this stock. St Helier, in particular, feels less like a down-at-heel seaside resort than it did.

The challenge for Jersey is to replace lost hotel stock with new accommodation that is more in tune with market conditions. It is difficult to achieve this given

the competition for land, but this needs to be a priority for sites, such as Fort Regent, where visitor accommodation is an option.

The hotel stock is, overall, more upmarket than in the past, although there is still a substantial amount that would benefit from upgrading.

A large proportion of hotels have swimming pools and spas. Several spas are highly rated. It seems that the staff shortage is probably affecting the provision of treatments in spas (as with all other services to tourists).

Our view, as in 2017, is that there may be opportunity for Jersey to be promoted and develop its product in line with a theme of “wellness”. Recent research suggests that this has become even more of a factor influencing tourism decisions than it was pre-pandemic.

A strategy for this nature could have the advantage of covering a wide variety of initiatives including cycling, local food, outdoor activity, sustainability and the initiative for Jersey to be declared a UNESCO Geopark. It could also have the advantage of being of as much, or more, benefit to locals as tourists.

Cycling, within this, may warrant further research to identify initiatives that might be implemented quickly. A number of companies are providing cycle hire, but there are reports of shortages of bikes to rent, especially road bikes. A city-bike scheme for conventional bicycles (similar to the e-bike service that Evie Bikes provides) could be advantageous, as might be one or more hotels that are orientated towards cyclists.

A high proportion of the island's hotel accommodation is in St Helier. The image and reality of the experience of St Helier is, therefore, likely to play a major role in the decision of people as to whether to visit the island and their overall enjoyment of the visit.

It could be sensible to develop and promote a brand for St Helier because of its importance in this respect.

St Helier is, realistically, only moderately enticing as a place to stay. Its main advantages are a more independent and distinctive retail offer than most UK towns, and a large number of places to eat and drink, many of which now have outdoor seating, which gives the town a more continental feel than in the past.

The public realm is now dated, however, as is the market. The town centre does not integrate well with the waterfront.

The currently temporary closure of the Opera House is a major gap in the entertainment offer of both the town and the island that will need to be addressed (it is currently due to re-open in 2024).

There is much opportunity to enhance the quality of St Helier as a place to live and visit.

A major element of the special character of Jersey, as with every destination, is the physical nature of the island and its climate.

Weather is a primary consideration in choice of holiday destinations. It seems likely that global warming, resulting in greater likelihood of extreme summer temperatures, especially in Southern Europe, could increase the appeal of Jersey to people who want a high probability of sun but without excessive heat and related menaces like wild fires and insects.

Another major element of Jersey's distinctive offer is the mix of British and continental culture. Jersey was, in the 1950s and 1960s, often a first venture "abroad" for UK residents and perceived as being relatively exotic.

That is no longer the case now that most people in Britain and Europe travel frequently to other countries from a young age, although there will still be a segment of the market that considers similarity to Britain an advantage.

Most frequent travellers go to other places for distinctive experiences.

It is likely, therefore, to be sensible to bring out as much as possible of the distinctive Jersey culture in the tourism product and the way it is promoted. This has been a feature of tourism development in places like the north of Scotland and Wales. It has been the focus of Visit Jersey's recent 'Curiously Brit...ish' marketing campaign.

Eating and drinking is a fundamental part of the visitor experience and consideration when choosing a destination.

The assessment shows that Jersey offers, on balance, a good range of places to eat and drink. It is not exceptional by contrast to places like Cornwall and the Lake District. This is mainly because it has less destination restaurants and foodie clusters of the ilk of Carmel and Padstow. Trip Advisor indicates that beachside seafood eateries are the most popular element of the island's offer.

We have not seen any research on the subject, but it is unlikely that Jersey will be perceived by potential visitors to have the advantages of continental countries such as France, Spain and Italy in having a distinctive, popular indigenous cuisine. It is possible that Jersey's cuisine is lumped with Britain's in being perceived to be of lower standard than that of other nations, although that might be mitigated by a perception of French influence.

Jersey's offer is weaker than most continental destinations and many places in Britain in terms of food markets and food and drink festivals.

This seems to be an obvious area of potential product development.

Jersey has a "Big Four" of indigenous foods that are special by comparison to other places – Jersey Royal Potatoes, Dairy, Lobsters and Oysters. There seems to be an opportunity to make more of them and more closely tie tourism marketing with marketing of the agricultural offer.

Jersey has a diverse range of attractions for a place of its size and population, including some star attractions.

Heritage-orientated attractions dominate, as is the case in most places. Heritage cannot, for the most part, be manufactured. Jersey, by comparison to places like Cornwall and the Lake District, is relatively strong on defence-orientated heritage. Investment taking place at Elizabeth Castle will enhance that further. It is relatively weak by comparison to them on country houses and historic gardens open to the public.

Jersey is, by comparison to France, Spain and Italy, relatively weak on churches and other architectural landmarks, art and historic townscapes. It is relatively weak compared to places like Greece and Turkey on ancient monuments.

There is, obviously, nothing that can be done about that. Every destination can only make the most of what history has left it.

An aspect of Jersey's heritage that seems to be neglected and offer potential is its world-class collection of artefacts and remains from pre-historic times.

Fort Regent is, otherwise, the specific heritage asset with most need and potential to make an impact on the tourism offer, probably not so much as a formal "heritage attraction" but as a collection of activities in a historic fortification. There are examples in Helsinki Harbour and near Oslo. The paradors of Spain are examples of how it might be used for an exceptional addition to the hotel offer.

The island's offer in creative arts is relatively weak by comparison to many competing destinations, although there has been some development since the last product audit in 2017. The new Capital House arts space run by Arthouse Jersey is a new hub. The Government has recently published an arts strategy which includes a commitment to a big expansion of funding for the arts.

Art museums normally have to start with a collection or, if they focus on contemporary art, need a large revenue subsidy. There are some works by famous artists like Banksy and Jeff Koons on display in Jersey, but it is not a substantive collection. One collection in public ownership in Jersey stands out – the work of the surrealist artist Claude Cahun, held by Jersey Heritage. Her story is also exceptionally interesting. Her house overlooking St Brelade's Bay is currently on the market.

It is the view of Colliers that it is unlikely to be a realistic aspiration to attract an outpost of an institution like the Tate or the Louvre. They only do that in exceptional circumstances and it would require enormous capital investment and revenue subsidy.

It is a more realistic aspiration to stage relatively small scale exhibitions from different major cultural institutions. The Millennium Galleries in Sheffield works that way.

The audit shows that the island has a diverse range of events, probably at least matching what is on offer in places like Cornwall and the Lake District.

There could be potential for new events that can attract people off-season.

There seems to be most potential, from a tourism development perspective, in a food and drink themed festival and / or a major festival based in St Helier that uses interior and exterior spaces.

An important trend is that visitors increasingly like to be able to plan and pre-book activities online, including restaurants.

2.2 Summary of Opportunities

Our opinion is that the following are opportunities for improvement of the tourism product that warrant serious consideration:

- 1 Achieving air routes to more continental destinations.
- 2 More branded full-service hotels (including, possibly, a uniquely Jersey style hotel e.g. Titanic Hotel in Belfast or Beatles Hotel in Liverpool).
- 3 More self-catering accommodation, partly achieved by enabling residents that go off-island for periods of time to let their property while they are not there.
- 4 Festivals and other initiatives, including marketing, that make much more of the “Big Four” foods that Jersey excels in: Jersey Royals, Dairy, Lobster, Oysters. Utilisation of the term “Big Four” and closer integration of tourism marketing with marketing of local produce.
- 5 A themed event in St Helier lasting at least 9 days that is distinctive and has enough niche interest to attract visitors from outside the island.
- 6 Revamping Central Market to be a foodie hub.
- 7 Revamping the public realm in St Helier as part of an effort to promote the town as an enticing destination in its own right.
- 8 A small but world-class gallery displaying the work of Claude Cahun, preferably in her former home overlooking St Brelade’s Bay.
- 9 A new museum to display Jersey’s world class collection of prehistoric artefacts.
- 10 Achieving UNESCO Geopark designation and using it to interpret the history of the island more effectively.
- 11 Reopening of the Opera House in improved form and more venues for live entertainment.
- 12 One or more exceptional beach clubs.
- 13 Developing “wellness” as a primary theme of the product offer and marketing.
- 14 Enhancement of cycle-related services.

3 Accommodation

3.1 Hotels

Jersey has 3,285 rooms in 50 registered hotels. Most of the rooms are either of 3 or 4 star standard³. There are 66 rooms per property on average. The average size of 2* hotels is significantly smaller.

Figure 2: Jersey hotel overview

Grade	Properties	Rooms	Rooms per Hotel	Beds	Hotels with Wet Leisure	Hotels w Function Rooms
Number						
5*	2	152	76	291	2	2
4*	16	1,184	74	2,382	11	12
3*	15	1,320	88	2,825	9	3
2*	17	629	37	1,213	5	1
Total	50	3,285	66	6,711	27	18
Percentage						
5*	4%	5%		4%	100%	100%
4*	32%	36%		35%	69%	75%
3*	30%	40%		42%	60%	20%
2*	34%	19%		18%	29%	6%
Total	100%	100%		100%	54%	36%

Over 80% of rooms are either double beds or twins. The capacity of the island's hotels is an average of two people per room i.e. 6,570 guests in total.

Figure 3: Room Size

Grade	NUMBER OF BEDS PER ROOM				Total	Av Persons per Room
	1	2	3	4		
Number of Rooms						
5*	13	139	0	0	152	1.9
4*	68	1,042	66	8	1,184	2.0
3*	92	987	205	36	1,320	2.1
2*	92	492	43	2	629	1.9
Total	265	2,660	314	46	3,285	2.0
Percentage of Rooms						
5*	9%	91%	0%	0%	100%	
4*	6%	88%	6%	1%	100%	
3*	7%	75%	16%	3%	100%	
2*	15%	78%	7%	0%	100%	
Total	8%	81%	10%	1%	100%	

³ These ratings are not formal as most hotels are not rated.

39 of the 50 hotels (i.e. 78%) participate in the JQA or AA quality assurance schemes. One is in both. They are shown in Figure 4. AA is more popular.

Figure 4: Quality Assurance

AA Rating		Jersey Quality Assurance Rating	
Hotel	Grade	Hotel	Grade
1 Longueville Manor	5* (Red)	La Place Hotel	4*
2 Grand Jersey Hotel & Spa	5*	Somerville Hotel	4*
3 Greenhills Country House	4* (Silver)	Golden Sands Hotel	4*
4 Chateau La Chaire	4* (Silver)	Hotel Cristina	4*
5 The Atlantic Hotel	4* (Red)	Hotel de France	4*
6 The Club Hotel & Spa	4* (Red)	Pontac House Hotel	3*
7 L'Horizon Hotel & Spa	4* (Red)	The Inn, Jersey	3*
8 St Brelade's Bay Hotel	4*	Hotel Ambassadeur	3*
9 Pomme D'Or	4*	Ommaroo Hotel	3*
10 The Royal Yacht Hotel	4*	Biarritz Hotel	3*
11 Radisson Blu Waterfront	4*	Marina Metro Hotel	3*
12 Best Western Royal Hotel	3* (Silver)	Hotel de Normandie	3*
13 Westhill Country Hotel	3*	Hotel Sandranne	2*
14 Merton Hotel	3*	Runnymede Court Hotel	2*
15 Pontac House Hotel	3*	Old Bank House Hotel	2*
16 Beausite Hotel	3*		
17 Norfolk Lodge	3*		
18 Apollo Hotel	3*		
19 The Dolphin Hotel	2*		
20 Premier Inn (Bath Street)	Rec		

Somerville Hotel, The Moorings and St Brelade's Bay Hotel have recently had major refurbishments.

54% of all hotel rooms are in St Helier. There are more four- and five-star hotels outside of St Helier than in that town. There are more three-star properties in St Helier than elsewhere on the island. The number of two-star establishments are similar in- and outside St Helier.

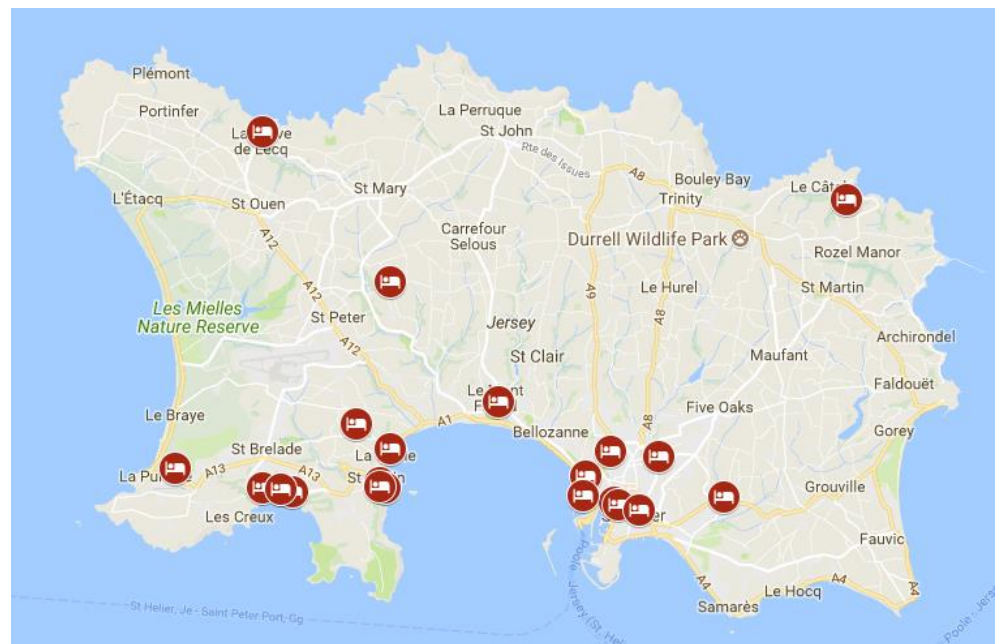
Figure 5: Proportion of hotel stock located in St Helier

St Helier				Outside St Helier			TOTAL		
Grade	Hotels	Rooms	% of Rooms on Island	Hotels	Rooms	% of Rooms on Island	Hotels	Rooms	% of Rooms on Island
4* / 5*	7	677	51%	11	659	49%	18	1,336	100%
3*	9	769	58%	6	551	42%	15	1,320	100%
2*	8	424	67%	9	205	33%	17	629	100%
Total	24	1,870	57%	26	1,415	43%	50	3,285	100%

Figure 6, Figure 7 and Figure 8 show 4 / 5 *, 3* and 2* hotels, ranked in order of their average rating on Trip Advisor⁴, and map them.

Figure 6: Four and Five Star Hotels

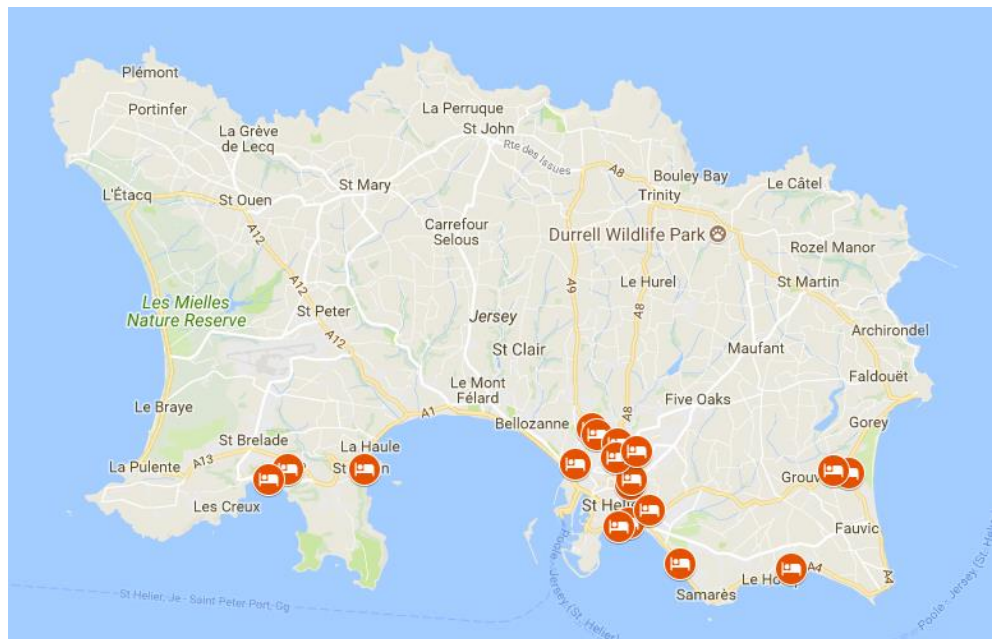
Hotel	Location	Rooms	TRIP ADVISOR			
			Reviews	Av Score	% Excellent	% Poor + Terrible
1 Longueville Manor	St Saviour	29	1,152	4.8	88%	1%
2 La Place Hotel	St Aubin	38	1,463	4.8	87%	1%
3 Greenhills Country House Hc	St Peter	33	1,065	4.8	84%	1%
4 The Atlantic Hotel	St Brelade	50	978	4.7	81%	2%
5 St Brelade's Bay Hotel	St Brelade	77	1,234	4.7	77%	2%
6 Somerville Hotel	St Aubin	59	1,898	4.6	71%	2%
7 Golden Sands Hotel	St Brelade	62	1,228	4.6	69%	2%
8 Hotel Cristina	St Aubin	63	1,426	4.6	67%	2%
9 Banjo	St Helier	4	75	4.5	71%	5%
10 L'Horizon Hotel & Spa	St Brelade	106	2,383	4.5	68%	3%
11 Pomme D'Or	St Helier	143	2,653	4.5	63%	3%
12 Chateau La Chaire	St Martin	13	551	4.5	66%	5%
13 The Royal Yacht Hotel	St Helier	110	2,933	4.4	62%	6%
14 Hotel de France	St Saviour	129	2,389	4.4	57%	4%
15 Grand Jersey Hotel & Spa	St Helier	123	2,214	4.3	54%	6%
16 The Club Hotel & Spa	St Helier	46	1,078	4.3	55%	6%
17 Hotel Savoy	St Helier	56	1,739	4.3	50%	5%
18 Radisson Blu Waterfront	St Helier	195	3,510	4.2	48%	8%



⁴ As at late June 2022

Figure 7: Jersey 3 Star Hotels⁵

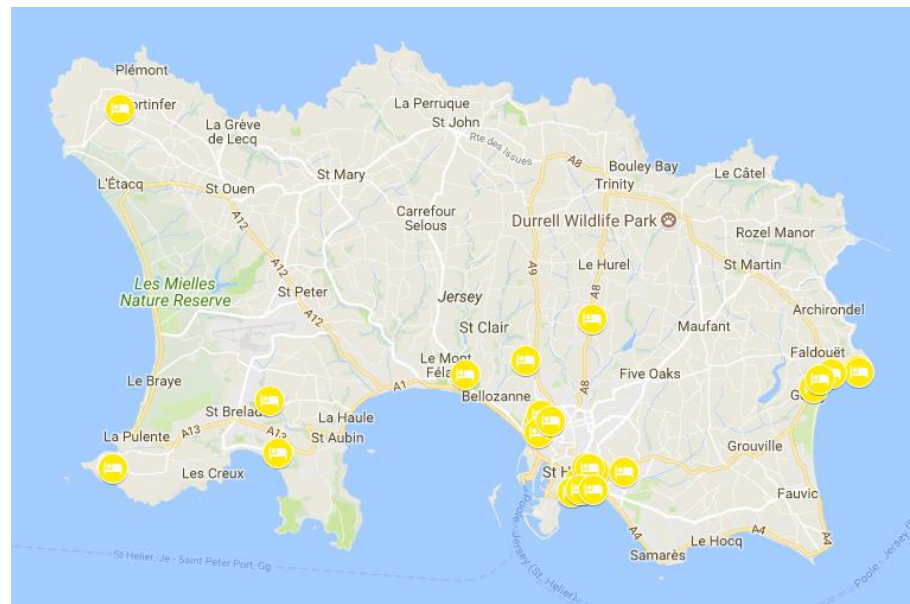
Hotel	Location	Rooms	Reviews	TRIP ADVISOR		
				Average Score	% Excellent	% Poor + Terrible
1 Beau Rivage Hotel	St Brelade	28	215	4.6	71%	2%
2 Westhill Country Hotel	St Helier	90	557	4.5	66%	3%
3 Merton Hotel	St Saviour	286	3,211	4.5	62%	3%
4 Pontac House Hotel	St Clements	27	254	4.5	63%	4%
5 The Inn, Jersey	St Helier	36	1,136	4.4	57%	3%
6 Monterey Hotel	St Helier	73	1,036	4.4	53%	3%
7 Best Western Royal Hotel	St Helier	89	1,077	4.3	52%	4%
8 Hotel Ambassadeur	St Clements	89	684	4.3	55%	7%
9 Beausite Hotel	Grouville	76	279	4.3	50%	6%
10 Beachcombers Hotel	Grouville	45	667	4.2	49%	7%
11 Norfolk Lodge	St Helier	101	699	4.2	42%	5%
12 Premier Inn (Charing Cross)	St Helier	91	418	4.1	54%	14%
13 Ommaroo Hotel	St Helier	82	576	4.0	35%	9%
14 Apollo Hotel	St Helier	85	1,102	3.6	21%	17%
15 The Moorings Hotel	Gorey	15	7	5.0	100%	0%



⁵ Premier Inn Bath Street is not open at the time of the preparation of the study.

Figure 8: 2 Star Hotels

	Hotel	Location	Rooms	Reviews	TRIP ADVISOR		
					Average Score	% Excellent	% Poor + Terrible
1	Biarritz Hotel	St Brelade	45	689	4.8	87%	1%
2	Maison Des Landes	St Ouen	25	49	4.6	76%	6%
3	Maison Gorey Hotel	Gorey	30	236	4.5	60%	3%
4	Almorah Hotel	St Helier	14	38	4.5	71%	5%
5	Norfolk Hotel	St Helier	100	677	4.4	56%	2%
6	Hotel Sandranne	St Helier	31	87	4.4	64%	7%
7	Talana Hotel	St Saviour	41	352	4.2	48%	5%
8	Mornington Hotel	St Helier	31	276	4.2	46%	5%
9	Oaklands Lodge Hotel	Trinity	10	95	4.2	43%	6%
10	The Dolphin Hotel	Gorey	16	128	4.2	48%	7%
11	Runnymede Court Hotel	St Helier	57	251	4.1	42%	6%
12	Old Bank House Hotel	Gorey	17	109	3.9	39%	16%
13	Marina Metro Hotel	St Helier	34	288	3.9	35%	13%
14	Sarum Hotel	St Helier	52	97	3.9	36%	14%
15	Seascale Hotel	Gorey	6	103	3.8	41%	17%
16	Hotel de Normandie	St Saviour	105	990	3.7	22%	14%



The average rating on Trip Advisor increases by grade.

Figure 9: Trip Advisor Rating by Grade

	Average Score	% Excellent	% Poor + Terrible
4 & 5 Star	4.5	64%	4%
3 Star	4.3	52%	6%
2 Star	4.2	49%	7%

The average rating on Trip Advisor is higher for hotels outside St Helier.

Figure 10: Average Trip Advisor rating by hotel grade

	St Helier	Elsewhere
4 & 5 Star	4.3	4.6
3 Star	4.2	4.5
2 Star	4.2	4.2

The 15 largest hotels by number of rooms (30% of properties) account for 57% of rooms and are listed in Figure 11. All but four have swimming pools.

Figure 11: Top 15 hotels by number of rooms

	Hotel	Location	Level	Rooms	Leisure
1	Merton Hotel	St Saviour	3*	286	Wet
2	Radisson Blu Waterfront	St Helier	4*	195	Wet
3	Pomme D'Or	St Helier	4*	143	
4	Hotel de France	St Saviour	4*	129	Wet
5	Grand Jersey Hotel & Spa	St Helier	5*	123	Wet
6	Premier Inn (Bath Street)	St Helier	3*	122	
7	The Royal Yacht Hotel	St Helier	4*	110	Wet
8	L'Horizon Hotel & Spa	St Brelade	4*	106	Wet
9	Hotel de Normandie	St Saviour	2*	105	Wet
10	Norfolk Lodge	St Helier	3*	101	Wet
11	Norfolk Hotel	St Helier	2*	100	Wet
12	Premier Inn (Charing Cross)	St Helier	3*	91	
13	Westhill Country Hotel	St Helier	3*	90	Wet
14	Best Western Royal Hotel	St Helier	3*	89	
15	Hotel Ambassadeur	St Clements	3*	89	Wet
				1,879	

Nine hotels, with 595 rooms, have closed since 2017. A second Premier Inn, with 122 rooms, has opened. The net loss is 473 rooms. This represents loss of 13% of the room stock. 86% of the lost rooms are in hotels that were in St Helier. Three quarters was of 3* standard.

Figure 12: Hotels closed since 2017

	Hotel	Rooms	Location	New Use	Level
1	Fort D'Auvergne	65	St Helier	Apartments	3*
2	Hampshire Hotel	42	St Helier	Care Home for people with disabilities	3*
3	Mayfair Hotel	233	St Helier	Apartments	3*
4	Revere Hotel	56	St Helier	Apartments	3*
5	Windmills Hotel	40	St Brelade	Apartments	3*
6	Alhambra Hotel	18	St Helier	Apartments	2*
7	Hotel Miramar	38	St Brelade	Houses	2*
8	Mountview Hotel	31	St Helier	Staff Accommodation	2*
9	Stafford Hotel	72	St Helier	Apartments	2*
Total:		595			

The Millbrook House Hotel is also currently closed. It is being refurbished by CCA Galleries International Ltd as a 'five-star art hotel'. The owners have said the cost will be £14m.

The closures are a continuation of a long term trend of loss of 2* and 3* stock. There were 1,760 2* rooms when we assessed the situation in 2006. That has reduced by two thirds.

There were 1,942 3* rooms in 2006. That has reduced by a third, although a portion was from hotels like the Royal Yacht and Pomme d'Or upgrading to 4*.

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

With the exception of Millbrook House Hotel, the only firm proposal for new development that is known is Les Sablons in St Helier. The proposed development is a Wilde by Staycity aparthotel with 103 units.

The proposed mixed use development of Fort Regent includes a hotel.

Premier Inn, Radisson Blu and, arguably, Best Western Royal (Best Western is a marketing consortium) are the only hotels on the island operating under international brands.

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 Ireland⁶, with the Club shortlisted.

The spas at the Hotel de France, the Grand Jersey, the Club, L'Horizon, and also Spa Sirène at The Royal Yacht Hotel, are featured in the Good Spa Guide. That is five in total.

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. It is currently being refurbished. 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.

⁶ Which is rare in being entirely independent. It covers properties of all price ranges.

3.2 Guest Houses

There are about 260 rooms (7% of all rooms in serviced accommodation) in registered bed and breakfasts and guest houses. Figure 13 shows them, sorted by their rating on Trip Advisor. Most are in St Helier and St Brelade.

Figure 13: Registered Guest Houses

Name	Location	Rooms	Reviews	TRIP ADVISOR			Liquor Licence
				Average Score	% Excellent	% Poor + Terrible	
1 The Panorama	St Brelade	14	88	4.9	92%	0%	N
2 La Haule Manor	St Brelade	16	967	4.9	90%	0%	Y
3 The Beaumont Inn	St Peter	5	342	4.6	78%	4%	Y
4 Undercliff Guest House	Trinity	8	147	4.6	75%	6%	N
5 Old Court House Inn	St Brelade	10	427	4.5	70%	7%	Y
6 Avoca Villa Guest House	St Helier	7	24	4.5	46%	0%	N
7 Seafish Cafe & Guest House	St Brelade	4	278	4.4	64%	5%	Y
8 Alister Guest House	St Helier	11	68	4.3	59%	6%	N
9 St Magloire Guest House	St Brelade	12	166	4.3	60%	9%	Y
10 Seawold Guest House	St Peter	22	166	4.3	52%	7%	N
11 De L'Etang	St Helier	13	165	4.3	50%	5%	Y
12 Prince Of Wales Hotel	St Ouen	15	320	4.2	56%	9%	Y
13 Fairholme Guest House	St Helier	15	31	4.2	52%	10%	N
14 Peterborough House	St Brelade	12	10	4.1	30%	10%	N
15 Villa Nova Guest House	St Helier	19	39	4.0	31%	8%	Y
16 Thalatta Guest House	St Helier	15	109	4.0	38%	13%	N
17 La Bonne Vie Guest House	St Helier	10	104	3.9	30%	8%	N
18 Jaylana Guest House	St Helier	4	11	3.8	64%	27%	N
19 Franklyn Guest House	St Helier	7	8	3.8	13%	13%	N
20 Bon Viveur	St Brelade	19	158	3.6	30%	18%	Y
21 La Croix Guest House	St Ouen	6	205	3.6	19%	20%	N
22 Havelock Guest House	St Helier	16	92	3.1	18%	38%	N
Total:		260					

Figure 14 shows that 10 guest houses (37%) participate either in the JQA or AA quality assurance schemes.

Figure 14: Guest Houses in Quality Assurance Schemes

Jersey Quality Assurance Rating		AA Rating	
Guest House	Grade	Guest House	Grade
1 La Haule Manor	5* (Gold)	The Panorama	5* (Yellow)
2 Old Court House Inn	5*	The Beaumont Inn	4*
3 Undercliff Guest House	4* (Gold)		
4 St Magloire Guest House	4*		
5 Bon Viveur	3*		
6 De L'Etang	3*		
7 Avoca Villa Guest House	2*		
8 Thalatta Guest House	2*		

Trip Advisor ratings are, as with hotels, significantly higher for properties outside St Helier than those in St Helier.

Figure 15: Average Trip Advisor Rating for Guest Houses

	St Helier	Elsewhere
Guest Houses	4.1	4.3

The number of rooms has reduced by 32% since 2017.

Figure 16: Guest Houses Closed Since 2017

	Property	Rooms	Street
1	Au Caprice GH	12	St Brelade
2	Bay View GH	12	St Helier
3	Haven Quest House	11	St Helier
4	Huntley Lodge	5	St Helier
5	Lorraine GH	10	St Helier
6	Richelieu Lodge	10	St Saviour
7	Rocqueberg View GH	9	St Clement
8	Seacroft GH	8	St Helier
9	St Francis GH	5	St Helier
10	The Lyndhurst Jersey	11	St Brelade
11	The Village B&B	7	St Lawrence
12	Surrey Lodge GH	7	St Helier
13	Beach View	10	St Helier
14	Maison Chaussey	8	St Helier
	Total:	125	

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 Self-Catering

Figure 17 shows that there are 326 units, mainly apartments, in 32 registered properties for holiday rental. Most are not graded. The number is similar to what it was in 2017, although that masks both closures and openings.

Figure 18 shows that a third of the units are split between Liberty Wharf apartments and Les Ormes Golf and Leisure Village. 5 properties (15% of the total) account for 60% of all units.

Figure 17: Self-Catering (properties registered since 2017 highlighted)

	Name	Location	Units	TRIP ADVISOR			
				Reviews	Score	% Excellent	% Poor + Terrible
1	Merton Suites	St Saviour	28	3,215	4.5	62%	3%
2	Harbour View Self Catering	St Brelade	5	305	4.7	81%	2%
3	Saco Apartments	St Helier	24	287	4.8	84%	1%
4	Liberty Wharf Apartments	St Helier	63	261	4.6	69%	3%
5	Water's Edge Chalets	Trinity	6	227	3.7	30%	19%
6	Porthole Suites	St Brelade	10	202	4.9	95%	1%
7	Les Ormes de La Mer	St Brelade	6	184	4.3	57%	8%
8	Les Ormes Resort	St Brelade	62	184	4.3	57%	8%
9	Rozel Farm Holiday Cottages	Trinity	2	130	4.8	83%	0%
10	Amani Luxury Self Catering	St Brelade	10	122	4.8	85%	2%
11	Ocean Walk Apartments	St Brelade	12	112	4.5	67%	4%
12	Uplands Apartments	St Helier	12	54	4.3	44%	2%
13	Discovery Bay	St Peter	11	52	4.2	54%	10%
14	Samares Manor	St Clement	6	46	4.5	74%	7%
15	La Rocco Apartments	St Brelade	22	36	4.3	58%	11%
16	Corbiere Phare	St Brelade	7	30	3.8	37%	20%
17	Beach House	St Helier	1				
18	Bleue Lune	Trinity	1				
19	Brabant Self Catering	Trinity	1				
20	Cherry Tree Apartments	St Helier	2				
21	Cider Press House	Trinity	1				
22	Falaise House Self Catering	St Mary	2				
23	Greve De Lecq (Arthouse Jersey)	St Mary	3				
24	Grosnez Farm	St Ouen	2				
25	La Ferme du Vau Tocque	St Brelade	1				
26	La Haie Fleurie	St Martin	8				
27	Le Hurel Holiday Cottages	Trinity	6				
28	Mont Es Croix Cottage	St Brelade	1				
29	Panoramic Apartments	St Peter	6				
30	Sur La Mer Apartments	St Brelade	1				
31	Tea Field Cottages	St Lawrence	2				
32	Villa Villettri	St Helier	2				
Total			326				

Figure 18: Registered non-serviced accommodation

	Name	Location	Units
1	Liberty Wharf Apartments	St Helier	63
2	Les Ormes Resort	St Brelade	62
3	Merton Suites	St Saviour	28
4	Saco Apartments	St Helier	24
5	La Rocco Apartments	St Brelade	22
	Total		199

Figure 19 shows the split by size of accommodation⁷. About half of units have one bedroom, designed to accommodate 1-3 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

Capacity	No	%
2 Person	123	43%
3 Person	11	4%
4 Person	91	32%
5 Person	28	10%
6 Person	20	7%
7 Person	5	2%
8 Person	5	2%
9 Person	3	1%
Total:	286	100%

14 historic properties managed by Jersey Heritage are also available for self-catering. They include Seymour Tower (located two miles off the east coast and surrounded by the sea when the tide is up), Elizabeth Castle and various other coastal forts, towers and historic agricultural buildings.

Les Ormes has permission for an additional 60 units (44 one-bed, two two-bed, 13 four-bed and one six-bed) which are being built in phases.

AirDNA reports that 252 properties are listed on Airbnb. 170 (68%) are whole homes; 82 are rooms within homes. 70% have one bedroom.

The overall rating is 4.84 out of 5. It reports 93% average occupancy for August 2022⁸ and average daily rate of £140.

Provision of accommodation via sites like Airbnb is restricted by legislation⁹. All properties that provide visitor accommodation for 6 people or more must be registered. There is no requirement for registration for properties that provide accommodation for 5 or less. The rule is, however, that the owner must be on

⁷The composition of units in 8 of the establishments is not known

⁸ As at 8 July 2022.

⁹ The Tourism and Lodging Laws.

the property at the same time as guests. This is unless the property has permission for tourism rather than residential use. This means that, in practice, people are not able to buy cottages and other property for letting to tourists and are not able to offer their homes to visitors if they are off island. It also means that there is no regulation of accommodation marketed through channels like Airbnb except if it is registered tourism accommodation.

4 Activities

4.1 Attractions Overview

Figure 20 lists visitor attractions on the island¹⁰, ranked by the number of reviews they have on Trip Advisor, which is an indicator of the degree to which they are likely to be visited. The accompanying database has additional detail of what is on offer and of prices and also lists other attractions.

Figure 20: Visitor Attractions in Jersey by number of Trip Advisor Reviews

Attraction	Sector	Reviews	Score	% Excellent	% Poor + Terrible
1 Jersey War Tunnels	Heritage	5,650	4.6	69%	1%
2 Jersey Zoo	Family	3,735	4.6	72%	2%
3 Elizabeth Castle	Heritage	3,356	4.5	63%	1%
4 Mont Orgueil Castle	Heritage	1,705	4.6	66%	1%
5 Jersey Museum & Art Gallery	Museum	1,129	4.5	57%	1%
6 Maritime Museum & Occupation Tapestry	Museum	1,008	4.5	62%	2%
7 Jersey Bus Tours	Tour	937	4.5	68%	6%
8 La Mare Wine Estate	Other	883	4.1	50%	9%
9 Botanic Gardens at Samares Manor	Garden	685	4.1	45%	11%
10 Jersey Pearl	Other	673	4.2	47%	8%
11 Waverley Tours	Tour	603	4.7	80%	2%
12 Jersey Lavender Farm	Other	596	3.9	38%	12%
13 Channel Islands Military Museum	Museum	519	4.7	76%	2%
14 Tantivy Blue Coach Tours	Tour	519	4.3	58%	10%
15 Le Hougue Bie Museum	Museum	442	4.5	61%	2%
16 aMaizin! Adventure Park	Family	398	4.5	71%	7%
17 Greve de Lecq Barracks	Heritage	396	4.6	66%	1%
18 16 New Street - The Georgian House	Museum	323	4.6	68%	1%
19 Pallot Steam, Motor & General Museum	Museum	323	4.5	60%	2%
20 Eric Young Orchid Foundation	Garden	302	4.5	66%	5%
21 Hamptonne Country Life Museum	Museum	217	4.2	48%	4%
22 Les Ormes Resort Fun Zone	Family	184	4.3	57%	8%
23 Aquasplash - Leisure Pool (Flumes)	Family	137	3.8	29%	12%
24 National Trust for Jersey Wetland Centre	Other	79	4.5	62%	4%
25 Catherine Best	Other	63	4.4	57%	0%
26 Valley Adventure Centre	Family	57	4.7	75%	2%
27 Cineworld	Entertainment	45	3.7	31%	18%
28 Judith Queree's Garden (not open in 2022)	Garden	35	4.2	69%	17%
29 MFA Bowl Jersey	Entertainment	27	2.1	7%	67%
30 Arcadia	Entertainment	27	4.1	44%	4%
31 Le Moulin de Quetivel	Heritage	25	4.3	56%	4%
32 Le Moulin de Tesson	Heritage	25	4.3	56%	4%
33 Rocco's Crazy and Mini Golf	Family	12	4.4	50%	0%
34 History Alive! / Jersey Military Tours	Tour	9	4.4	67%	0%
35 Jersey Archive	Museum	6	5.0	100%	0%
36 Fort Adventures - Playzone. Fort Regent.	Family	3	1.0	0%	100%
37 The Elms	Heritage	1	5.0	100%	0%
38 Morel Farm	Heritage				
39 Channel Island Liquor Company	Other				
40 Les Landes Race Course	Other				

¹⁰ There are some others listed on the database.

Figure 21 shows the attractions with more than 100 Trip Advisor reviews by their average rating out of 5¹¹.

Figure 21: Attractions with more than 100 ratings by average rating

Attraction	Sector	Reviews	Score	% Excellent	% Poor + Terrible
1 Waverley Tours	Tour	603	4.7	80%	2%
2 Channel Islands Military Museum	Museum	519	4.7	76%	2%
3 Jersey War Tunnels	Heritage	5,650	4.6	69%	1%
4 Greve de Lecq Barracks	Heritage	396	4.6	66%	1%
5 16 New Street - The Georgian House Museum	Museum	323	4.6	68%	1%
6 Jersey Zoo	Family	3,735	4.6	72%	2%
7 Mont Orgueil Castle	Heritage	1,705	4.6	66%	1%
8 Elizabeth Castle	Heritage	3,356	4.5	63%	1%
9 Le Hougue Bie Museum	Museum	442	4.5	61%	2%
10 Eric Young Orchid Foundation	Garden	302	4.5	66%	5%
11 Maritime Museum & Occupation Tapestry	Museum	1,008	4.5	62%	2%
12 Jersey Bus Tours	Tour	937	4.5	68%	6%
13 Pallot Steam, Motor & General Museum	Museum	323	4.5	60%	2%
14 Jersey Museum & Art Gallery	Museum	1,129	4.5	57%	1%
15 aMaizin! Adventure Park	Family	398	4.5	71%	7%
16 Les Ormes Resort Fun Zone	Family	184	4.3	57%	8%
17 Tantivy Blue Coach Tours	Tour	519	4.3	58%	10%
18 Hamptonne Country Life Museum	Museum	217	4.2	48%	4%
19 Jersey Pearl	Other	673	4.2	47%	8%
20 La Mare Wine Estate	Other	883	4.1	50%	9%
21 Botanic Gardens at Samares Manor	Garden	685	4.1	45%	11%
22 Jersey Lavender Farm	Other	596	3.9	38%	12%
23 Aquasplash - Leisure Pool (Flumes)	Family	137	3.8	29%	12%

The island has a good range of attractions, given its size. It is on a par with places like South Lakeland (as summarised in Section 7), with major attractions like Jersey War Tunnels and Jersey Zoo.

4.2 Arts

4.2.1 Performing Arts

Jersey Opera House is normally 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 State since 1995. It was reopened after comprehensive refurbishment in 2000. The main auditorium has 625 seats. It had an extensive programme of commercial touring productions, with focus on light entertainment, especially popular music, comedy and musicals.

It is closed because of major maintenance issues. That currently represents a major gap in the island's offer, probably affecting locals more than tourists.

¹¹ Points awarded: Terrible = 1; Poor = 2; Average = 3; Very Good = 4; Excellent = 5.

The Jersey Arts Centre has an auditorium seating 250 and is the main venue for locally produced theatre. The Royal Jersey Showground has capacity for some larger theatre shows and has hosted some productions during 2022.

4.2.2 **Visual Arts**

The island has a small selection of commercial galleries: The Link Gallery (St Helier), The Harbour Gallery (St Aubin), CCA Galleries (St Helier), Studio Eighteen (St Helier), Victoria Art Gallery and Public & Private Gallery (St. Helier).

ArtHouse Jersey is a charity, with funding from the government, that commissions and produces work and gives grants and guidance to artists. It is based at Greve de Lecq Barracks. It commissions several exhibitions per annum, normally at Greve de Lecq or Capital House in St Helier, typically work done by artists in residency.

Some classical art is displayed at the Jersey Museum and Art Gallery.

There are occasional exhibitions at the Jersey Museum and Jersey Arts Centre.

There have been proposals in the past for a “National Gallery” located at St Helier waterfront.

The collection of the surrealist artist Claude Cahun is of international significance. It is summarised in Section 6.1.

4.2.3 **Strategy**

The Creative Island, an Arts Strategy for Jersey, 2022-27, has recently been published by the Government of Jersey.

Perhaps of most significance is its commitment to investing 1% of overall Government expenditure in Arts, Culture and Heritage from 2022. This is a large increase on current funding.

Arts organisations that currently receive regular funding - ArtHouse Jersey, Jersey Arts Centre and Jersey Opera House - will receive in principle revenue funding over a three-year period (rather year to year, as currently).

The Arts Strategy has four themes, with specific recommended actions for each theme. These will be reviewed annually in a Jersey Creative Forum.

It envisages a small Arts Development Unit in the government that is responsible for channelling investment into the arts and working with practitioners, via a Creative Island Partnership.

It proposes a Grants for the Arts Fund, aiming to distribute £400,000 per annum via 15-25 grants.

4.3 Beaches

Jersey has about 28 beaches, most of which have a blue flag for cleanliness and maintenance. Figure 22 shows the top 15 in order of the number of ratings on Trip Advisor. St Brelade's Bay is the most popular. Most of the island's beaches have toilets and most of the main ones have at least a café. None, however, have the type of beach clubs that are common in continental resorts, providing services like chairs, towels, changing, refreshments and massage. There is deck chair hire available at St. Brelade's Bay.

Figure 22: Beaches in Jersey

Beach	Blue Flag	Life guard	Type	Parking	Toilets	Food / Bev	TRIP ADVISOR			
							Total	Score	% Excellent	% Poor + Terrible
St Brelade's Bay	Y	Y	Sand	Y	Y	Y	2,140	4.8	86%	0%
Grève de Lecq	Y	Y	Sand	Y	Y	Y	396	4.6	66%	1%
Bonne Nuit	Y	N	Harbour / Sand	Y	Y	Y	353	4.2	53%	8%
Plemont	Y	Y	Sand / Rock	Y	N	Y	310	4.7	79%	2%
St Ouen's Bay	Y	Y	Sand	Y	Y	Y	298	4.7	78%	1%
Green Island	Y	N	Sand	Y	Y	Y	291	4.5	73%	8%
Beauport	Y	N	Sand	Y	N	N	161	4.8	79%	0%
Portelet Bay	Y	N	Hbr / Rock/ Sandy	N	N	Y	127	4.7	76%	1%
Rozel Bay	Y	N	Harbour / Sand	Y	Y	Y	112	4.4	55%	2%
Archirondel	Y	N	Shingle	Y	Y	Y	28	4.3	50%	4%
Bouley Bay	Y	N	Sand	Y	Y	Y	21	3.6	19%	19%
Havre des Pas	Y	N	Sand	Y	Y	Y	21	4.0	38%	10%
La Rocque Harbour	N	N	Harbour / Sand	Y	Y	Y	17	4.4	53%	0%
Anne Port	N	N	Shingle	Y	N	N	15	4.4	60%	0%
Grouville Bay	Y	N	Sand	Y	Y	Y	1	5.0	100%	0%
Victoria Pool	Y	Y	Sand	Y	Y	Y				

4.4 Casinos

There are no casinos because of anti-gambling legislation. Proposals for Fort Regent include a casino. This would require public consultation preceding a change to the law.

4.5 Event Spaces

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

Figure 23: Event Capacity in Jersey Hotels

Hotel	Location	Rooms	Max Cap	Total Cap
Pomme D'Or	St Helier	6	300	830
Radisson Blu Waterfront	St Helier	8	400	635
Hotel de France	St Saviour	10	250	558
Best Western Royal Hotel	St Helier	4	300	435
Royal Yacht Hotel	St Helier	6	280	397
L'Horizon Hotel & Spa	St Brelade	3	300	364
Grand Jersey Hotel & Spa	St Helier	7	170	350
Ommaroo Hotel	St Helier	3	160	280
Hotel La Place	St Aubin	4	100	240
Hotel Ambassadeur	St Clements	1	170	170
Longueville Manor	St Saviour	3	60	160
The Club Hotel & Spa	St Helier	2	80	160
Atlantic Hotel	St Brelade	2	80	120
Somerville Hotel	St Aubin	4	55	115
St Brelade's Bay Hotel	St Brelade	1	90	90
Prince of Wales Hotel (Pub)	St Ouen	1	80	80
Old Court House	St Aubin	1	50	50
Moorings Hotel	Gorey	2	25	47
Greenhills Country House Hotel	St Peter	1	35	35
Chateau La Chaire	St Martin	1	20	20

Source: AM:PM / CoStar

There is also, as Figure 24 shows, a wide selection of non-hotel venues of different character which host events, the largest of which are in Fort Regent.

There is not a dedicated convention centre on Jersey.

Figure 24: Non-Hotel Venues for Functions and Events

Venue	Spaces	Max Capacity
Fort Regent	5	
Gloucester Hall		2,000
Queens Hall		1,500
Don Theatre		130
Humphrey Room		75
Vauban Room		50
Jersey Opera House (CLOSED)	7	
The Theatre		625
OH! Cafebar		70
The Studio		95
The Dress Circle (bar)		70
The Upper Bar		100
The Berni Suite		45
The Stalls Bar		60
The Lido	4	1,000
La Mare Vineyard	4	
The Winery		220
Summer Marquee		60
The Vineyard Bistro		50
The Garden Room		20
Royal Jersey Showground	4	
Exhibition Hall		1,000
Members Room		100
Council Room		18
Showground		10,000
MFA Bowl	4	200
Springfield stadium	2	7,000
Blue Room		
Meeting Room		
Victoria College	5	
The Great Hall		380
De Quetteville Library		-
Howard Hall		130
Bistro		230
Classrooms		-
Les Mielles Golf Club		600
Jersey Arts Centre	6	250
Elizabeth Castle	2	
Weddings		100
The Governor's House		150
Mont Orgueil Castle	5	
Weddings		130
Venue spaces		200
Maritime Museum	2	250
La Hougue Bie (marquee)	1	200
Jersey Museum	4	250
Jersey Archive	1	60
Hamptonne Country Life Museum	3	200
16 New Street	NA	NA
Le Moulin de Quétivel	NA	NA
Grève de Lecq Barracks	NA	NA
Le Câtél Fort	NA	25
Le Don Hilton	NA	15

4.6 Events

Figure 25 and Figure 26 show events taking place in Jersey in 2022 that have been identified. There will be many other small events that have not been identified. There is a rich and diverse programme.

Most events take place between May and September. The long-established Battle of Flowers, International Air Display and Boat Show, in addition to the Weekender music festival, are perhaps the biggest annual events.

A notable feature is the large number of endurance types of events.

Events Jersey was established in 2016 with the objective of encouraging the development of the island as an events destination, with particular focus on the shoulder months.

It has limited resource, with one member of staff and an effective budget of c. £200,000 per annum. It has developed a best practice toolkit, asset register and online presence. It has worked with organisations like Jersey Sport and provided practical support for events like the Festival of Motoring, Boat Festival, Weekender and Festival of Words. It achieved early success in helping to attract the Superleague Triathlon, which took place in 2017, 2018 and 2019. It had more than 9,000 spectators, generated international media coverage and was credited with generating visitor spend of c.£750,000.

Figure 25: Events 2022

General Events		
1	Sat 2 Apr - Sun 3 Apr	The Jersey Big Weekend
2	Sun 24/04/2022	Drive it Day
3	Sat 28 May - 1 June	#LoveNature Festival
4	Thu 2 Jun - Sun 5 Jun	Queen Platinum Jubilee
5	Thu 2 Jun - Sun 5 Jun	Jersey International Motoring Festival
6	Fri 10 Jun - Sun 12 Jun	Barclays Jersey Boat Show
7	Thu 11 Aug - Fri 12 Aug	The Battle of Flowers and moonlight parade
8	Thu 8 Sep	Jersey International Air Display
9	Fri 18 Nov - Sun 20 Nov	Healthy Living Festival
Culture, Entertainment and Heritage Orientated		
1	Thu 17 Mar - Sun 20 Mar	St. Patrick's Day - St Helier Celebrations
2	Fri 18 Mar - Sat 19 Mar	Tony Parson Art Exhibition
3	Sat 2 Apr	Kings of Swing
4	Wed 13 Apr - 2 May	Jason Butler: One to One.
5	Sun 23 Apr - Fri 9 Sep	Genuine Jersey Artisans' Market
6	8 May - 15 May	Liberation International Music Festival
7	Mon 9 May	Liberation Day
8	Fri 8 Apr - 21 Apr	Until You Became Me
9	Sat 30 Apr - 1 May	Nina Zaeck & Lexie Taylor
10	Thu 12 May - Sun 15 May	13th Parish Festival
11	12 May - 4 Jun	HOME Exhibition
12	Fri 25 Mar - Sun 2 Apr	The Starving Artist
13	07-May	Open Milling
14	27-May	Wayne Stewart: Chrome Yellow
15	Sat 4 Jun - Sun 5 Jun	Victor Guerin & Bethan Watkins
16	Sat 11 Jun - Sun 31 Jul	Skipton Big Ideas - Where Waste Meets Design
17	Fri 17 Jun - Sun 26 Jun	CCA Galleries Summer Exhibition
18	Fri 17 Jun - Sat 18 Jun	Sunset Concerts
19	Fri 24 Jun - Sun 26 Jun	Good Vibrations Festival / CI Surf Championships
20	Sat 2 Jul - Sun 3 Jul	Out-There Festival
21	Thu 14 Jul	RampArts
22	Sat 30 Jul - Sun 31 Jul	The Wonky Weekend
23	Sat 27 Aug - Sun 28 Aug	Full Circle Festival
24	Fri 2 Sep - Sun 4 Sep	The Weekender
25	Sat 10 Sep	CI Pride Festival
26	Wed 16 Sep - Fri 18 Sep	Jersey Surf Film Festival
27	Wed 21 Sep - Sun 25 Sep	Festival of Words
28	Sat 24 Sep	Electric Park
29	Fri 30 Sep - Sun 2 Oct	Corn Riots Festival
30	Sat 22 Oct - Sun 6 Nov	Brilliance Festival
Crafts Orientated		
1	Sun 10 Apr	Jersey Pearl Spring Market
2	Monthly	Genuine Jersey Artisan's Market
Food and Drink Orientated		
1	Mon 28 Mar - Sun 8 May	Taste Jersey
2	Wed 8 Jun - Sun 12 Jun	Norman Market
3	Sun 12 Jun	OpenFarm
4	Sat 15 Aug	La Fais'sie D'Cidre
5	Thu 25- Mon 29 August	Portuguese Food Festival
6	Mon 10 Oct	Black Butter making

Figure 26: Events 2022

Sport-Orientated		
1	Sat 5 Mar	Jersey Bulls V Raynes Park Vale FC
2	Sun 13 Mar	Trail Monkey - El Diablo Trail Marathon
3	Sat 19 Mar	Jersey Bulls V Banstead Athletic FC
4	Sun 20 Mar	Hospice to Hospice Half Marathon
5	Sun 20 Mar	True Grit Wetlands Challenge
6	Sat 9 Apr	Jersey Bulls V Badshot Lea FC
7	Sat 16 Apr	Jersey Bulls V Redhill
8	Mon 18 Apr	Jersey Bulls V Horley Town FC
9	Sat 30 Apr	Double top ultra-marathon
10	Sat 30 Apr	Jersey Bulls V Fleet Town FC
11	Sat 20 Apr - Sun 1 May	Nine by Five Challenges
12	Sun 1 May	Gran Fondo Jersey
13	Sat 14 May	Jersey Reds V Guernsey Raiders SIAM CUP
14	Sun 22 May	Durrell challenge
15	Sun 22 May	Race for Life
16	Sat 11 Jun	Vistra Bloodwise Jersey Kid's Triathlon
17	Sat 18 Jun	Island Walk
18	Sat 25 Jun	FNHC Colour Festival
19	Sat 16 Jul - Sun 17 Jul	VBET Cup (Jersey Bulls)
20	Sun 17 Jul	Accuro Jersey Triathlon
21	Sat 6 Aug	Round The Rock - Trail Monkey
22	Sat 23 Jul	Jersey Bulls V Kettering Town FC
23	Sat 30 Jul	Jersey Bulls V Risborough Rangers FC
24	Thu 1 Sep - Sun 4 Sep	Carey Olsen Jersey Regatta
25	Sat 3 Sep	Breca Jersey Swimrun
26	Sun 2 Oct	Standard Chartered Jersey Marathon
27	Fri 7 Oct	Roberts Garage Jersey Rally
28	Sun 4 Dec	Durrell Dasher
Family-Orientated		
1	Sun 10 Apr - 24 Apr	A Bug's World
2	Mon 7 Jun - Tue 8 Jun	World Ocean Day
3	Sat 23 Aug - Sun 24 Aug	Havre Des Pas Seaside Festival
4	Sat 29 - Sun 30 Oct	Ghostly Tales at Hamptonne
5	Thu 17 Nov	La Fête de Noué / Simply Christmas
Open Gardens - Organised by JAYF		
1	Sun 3 Apr	Oaklands
2	Sun 1 May	Government House
3	Sun 15 May	Domaine des Vaux
4	Sun 29 May	Old Farm
5	Sun 5 Jun	Grey Gables
6	Sun 29 May	Old Farm
7	Sun 5 Jun	Grey Gables

4.7 Family-Orientated

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

Figure 27: Family-orientated attractions

Attraction	Seasonal?	Adult Admission Price		
		2022	2017	Change
aMaizin! Adventure Park	N	£13.50	£10.50	29%
Valley Adventure Centre	N	By activity	By activity	
Aquasplash - Leisure Pool (Flumes)	N	£7.85	£7.00	12%
Les Ormes Resort Fun Zone	Y	By activity	By activity	
Jersey Zoo	N	£18.00	£16.00	13%
Escape Rooms at Jersey War Tunnels	Y	£20.00	£15.00	33%
Rocco's Activity Centre	N	£7.50		

The 10-screen Cineworld at St Helier is a good cinema offer.

4.8 Food and Drink

Places that serve food and beverage that are registered under the Places of Refreshment Act do not have a liquor license.

There are seven categories of liquor licence.

Figure 28: Category of Liquor Licence in Jersey

1	Taverner's License - Pubs	Sale on the premises on weekdays between 9 am and 9 pm and on Sundays between 11 am and 9 pm.
2	Residential Licence – Tourist Accommodation	Sale of alcohol to people residing on the premises at any time.
3	Restaurant Licence	Sale of alcohol by a waiter to people consuming food on the premises. Principal business must be restaurant.
4	Comprehensive Licence	Sale of alcohol to residents at any time and to others on weekdays between 9 am and 9 pm, and on Sundays between 11 am and 9 pm.
5	Club Licence – Private Members Club	Sale of alcohol to residents at any time and others in permitted hours.
6	Off Licence	Sale of alcohol in permitted hours for consumption off the premises
7	Entertainment Licence	Cinema, theatre or other place of entertainment

There are about 350 premises with a licence to sell alcohol on the island, and about 190 places that serve food and non-alcoholic drink. This includes about 380 cafés / restaurants.

Figure 29: Licensed eating and drinking establishments in Jersey

	With Alcohol Licence	No Alcohol	Total
EATERIES			
Restaurant / Café	139	98	237
Bar with Food	98		98
Hotel Restaurant & Bar	44	1	45
Total Eateries:	281	99	380
BAR ONLY	32		32
On Premises Eating & Drinking Open to Public:	313	99	412
KIOSKS & TAKEAWAYS		92	92
All Eating and Drinking Open to the Public:	313	191	504
Member's Club	33		33
Hotels with bars for guests only:	5		5
All Eating and Drinking:	351	191	542

Figure 30 shows places to eat and drink that have more than 100 reviews on Trip Advisor and an average rating of 4 or above. The large number of reviews and high ratings for beach side eateries specialising in local seafood is notable.

Figure 30: Places to Eat and Drink with more than 100 Trip Advisor Reviews

Establishment	Reviews	Score	Establishment	Reviews	Score
1 Longueville Manor	727	5	49 Abilio's Restaurant	112	4.5
2 The Good Egg Beach Cafe	152	5	50 Restaurant Do Porto	101	4.5
3 Oy Box & Jersey Crab Shack	1,877	4.5	51 Kismet Cabana (Ouaisne Bay)	100	4.5
4 Jersey Crab Shack St Helier	1,761	4.5	52 Fridays (The Halkett)	528	4
5 Salty Dog Bar & Bistro	1,405	4.5	53 L'Auberge Du Nord	193	4
6 Mark Jordan at the Beach	1,339	4.5	54 Wildfire Restaurant & Bars	1,566	4
7 Aromas Restaurant	1,244	4.5	55 Quayside Bistro & Vittoria	1,504	4
8 Roseville Bistro	1,111	4.5	56 SeaFish Cafe (St Helier)	839	4
9 Bistro Rosa	1,019	4.5	57 Old Portelet Inn	824	4
10 El Tico Beach Cantina	1,012	4.5	58 Pizza Express - St Helier	785	4
11 Cafe Spice	858	4.5	59 Le Braye Cafe	770	4
12 Green Isd Rest & Beach Hut	715	4.5	60 Old Court House Inn	696	4
13 Feast Restaurant	695	4.5	61 Jersey Pearl Limited	674	4
14 Sugareef	660	4.5	62 Casa Mia Restaurant	617	4
15 Old Smugglers Inn	641	4.5	63 Soy Seafood and Sushi Bar	586	4
16 Colleen's Cafe	608	4.5	64 Jaipur Tandoori	559	4
17 Little Thai Restaurant	564	4.5	65 Bella Italia	551	4
18 Sumas Restaurant	553	4.5	66 TGI Fridays	528	4
19 The Lookout	505	4.5	67 Corbiere Phare	513	4
20 Bollywood Bytes Restaurant	497	4.5	68 Little Italy	502	4
21 La Taverne Restaurant	473	4.5	69 Moulin de Lecq	494	4
22 Plémont Beach Café	428	4.5	70 White Horse Inn	481	4
23 Lazin Lizard Restaurant	408	4.5	71 The Square	451	4
24 Moita's Bistro	403	4.5	72 The Goose	384	4
25 Mano's Bistro	379	4.5	73 Noya Shapla Limited	369	4
26 Muddy Duck Restaurant	376	4.5	74 Hugo's	339	4
27 The Beaumont Inn	343	4.5	75 The Priory Inn Devils Hole	299	4
28 Pizzeria Romana	326	4.5	76 Mino's Restaurant	292	4
29 Rozel Bay Tea Room	317	4.5	77 The Rozel Bar and Rest	260	4
30 Tamarind Restaurant	313	4.5	78 St Mary's Country Inn	248	4
31 Faulkner Fisheries Ltd	304	4.5	79 Anchor Club & The Boat Hse	244	4
32 Bracewell's Restaurant	303	4.5	80 Gradees Restaurant	242	4
33 Caffé Ristorante Italia	299	4.5	81 The Trinity Arms	229	4
34 Barro's Tropical Bistro	297	4.5	82 La Frégate Café	206	4
35 Seafish Cafe & Guest House	295	4.5	83 Portelet Bay Cafe	206	4
36 Indian Ocean Tandoori	283	4.5	84 A. De Gruchy & Co Ltd	195	4
37 Thai Chinese Park House	280	4.5	85 Les Fontaines Tavern	187	4
38 Funchal Paradise Restaurant	267	4.5	86 Bento Sushi	185	4
39 La Capannina Restaurant	253	4.5	87 Le Hocq	174	4
40 La Bastille Tavern	241	4.5	88 Watersplash Beach Bar & Diner	174	4
41 The Inn Jersey	217	4.5	89 Old Station Cafe	172	4
42 Princess Garden	196	4.5	90 Cafe Ouen	162	4
43 Number 10 Restaurant	179	4.5	91 The Royal St Martin	156	4
44 Beuvelande Campsite	156	4.5	92 Five Oaks Hotel	142	4
45 Sangria	154	4.5	93 The Pembroke	139	4
46 Samphire Restaurant	147	4.5	94 Sprigs Cafe	136	4
47 Air Mex La Hacienda	139	4.5	95 Pizzeria Famosa	133	4
48 Off The Rails Café	134	4.5	96 Cafe @ The War Tunnels	100	4

11 restaurants are listed in the Michelin Guide, although only one has a star.

Figure 31: Restaurants in the Michelin Guide

1	Banjo	
2	Bohemia	One Star
3	Green Island	
4	Longueville Manor	
5	Mark Jordan at the Beach	Bib Gourmand
6	Ocean Restaurant	
7	Oyster Box	
8	Samphire Jersey	
9	Sumas	
10	Tassili Restaurant	
11	The Bass and Lobster	

Farm Jersey promotes and assists the agricultural sector, including organising the annual Jersey Royal PR campaign. They highlight the “Big Four” of foods where Jersey has exceptional quality and distinctiveness:

- Jersey Royal Potatoes
- Dairy
- Lobsters
- Oysters

There are fascinating stories related to each.

Local food and drink is a feature of many events on the island, but there are no large specific food and drink orientated events and no farmer’s market.

4.9 Gardens

Jersey has a small selection of gardens regularly open to the public, with Samares Garden being the leading attraction. Judith Queree's Garden is closed in 2022. Five gardens are featured in the Good Garden Guide: Domaine Des Vaux, Durrell, Eric Young Orchid Foundation, Samares and Les Vaux. The Guide states that the Orchid Foundation has one of the finest collections in the world. Other gardens are opened to the public, one every fortnight from Spring to Autumn, with proceeds going to the Jersey Association for Youth and Friendship (JAYF).

Figure 32: Gardens open as Visitor Attractions

Attraction	Seasonal?	Adult Admission Price		
		2022	2017	Change
Botanic Gardens at Samares Manor	Y	£9.75	£9.50	3%
Eric Young Orchid Foundation	N	£6.50	£5	30%

4.10 Heritage

There are over 4,000 listed places and buildings on the island.

Figure 33 and Figure 34 show that there is a good selection of heritage attractions and museums and there is a good selection of tours, which are highly rated on Trip Advisor.

Figure 33: Heritage Attractions

Attraction	Seasonal?	Adult Admission Price		
		2022	2017	Change
Elizabeth Castle	Y	£13.20	£11.25	17%
With ferry		£16.25	£13.95	16%
Greve de Lecq Barracks	Y	Free	£2.00	
Jersey War Tunnels	Y	£16.00	£12.00	33%
Le Moulin de Quetivel	Y	£3.00	£3.00	0%
Le Moulin de Tesson	Y	Free	Free	
Mont Orgueil Castle	Y	£13.95	£12.20	14%
Morel Farm	N	Free	Free	
The Elms	N	Free	Free	

Figure 34: Museums

Attraction	Seasonal?	Adult Admission Price		
		2022	2017	Change
Jersey Museum & Art Gallery	N	£11.00	£9.95	11%
Le Hougue Bie Museum	Y	£10.30	£8.95	15%
Maritime Museum & Occupation Tapestry	N	£11.00	£9.80	12%
Hamptonne Country Life Museum	Y	£10.30	£8.70	18%
Jersey Archive	N	Free	Free	
Channel Islands Military Museum	Y	£8.00	£3.00	167%
16 New Street - The Georgian House Museum	Y	£6.00	£6.00	0%
Pallot Steam, Motor & General Museum	Y	£8.00	£6.50	23%

Figure 35: Tours

Attraction	Seasonal?	Adult Admission Price	
		2022	2017
Bay Tours Jersey	Y	All Day £25, Half Day £20	
History Alive! / Jersey	Y	Half day £205 (6 children / Half day £25	
Military Tours		adults)	Full day £43
Jersey Bus Tours	Y	£15.00-£27.50	
Tantivy Blue Coach Tours	Y	£20.00 - £27.50	£15-£20
Waverley Tours	Y	£6.00 - £25.00	£12-£20

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

Figure 36 has a list of well-known landmarks ordered by the number of Trip Advisor reviews they have. It suggests that La Corbiere Lighthouse is the most popular sight. Les Minquiers / Les Ecrehous has notably good reviews with almost every one of almost 600 reviewers saying that it is excellent.

Figure 36: A Selection of Other Places of Interest, Jersey

Landmark	Total	Score	% Excellent	% Poor + Terrible
La Corbiere Lighthouse	1,582	4.6	69%	1%
St Matthews Glass Church	601	4.3	49%	3%
Howard Davis Park	601	4.6	62%	0%
Les Minquiers / Ecrehous	598	4.9	97%	1%
St Brelade's Church	503	4.7	75%	0%
Devil's Hole	326	4.2	46%	4%
Grosnez Castle (ruin)	173	4.2	39%	1%
Jersey Wetland Centre	79	4.5	62%	4%
St Helier Church	57	4.5	58%	0%
St Catherine's Breakwater	23	4.1	35%	4%
St Saviours Church	20	4.7	70%	0%
St Catherine's Woods	19	4.5	58%	0%
Val de la Mare Arboretum	14	4.6	71%	0%
Coronation Park	10	4.3	40%	0%
The Sand Dunes	4	5.0	100%	0%
The Dolmens	3	4.7	67%	0%
Queen's Valley & Val de la Mare Reservoirs	3	4.7	67%	0%
La Rocco Tower				
Seymour Tower				

Most main heritage sites and museums are managed by Jersey Heritage, an independent charity established in the 1980s to take responsibility for aspects of the heritage work of the Government, the Société Jersiaise, the National Trust for Jersey, parishes and private owners. It does this under a variety of service level agreements.

It is leading two major projects currently with funding from government:

- Refurbishment of the Hospital Block and the Officer's Quarters at Elizabeth Castle. This will enhance the visitor attraction and create opportunity for events. JHT plans to use the facilities as a wellbeing retreat centre in winter.
- A new museum of agriculture at Hamptonne.

The National Trust for Jersey, founded in 1936, is also a key player in making historic property available to visitors. It is a self-funded independent charity with the objective of permanently protecting areas of natural beauty and historic interest. It cares for 30 historic buildings ranging from mills to farmhouses, over 1,700 vergées of land, including important habitats and 10km of footpaths. It has been instrumental in securing increased protection for the rural landscape and coastline and saving buildings such as 16 New Street and Tesson Mill.

It relies on grants and bequests for capital repair projects and environmental initiatives such as the Hedge Fund and Birds on the Edge. The Trust is a member of INTO, (International National Trust Organisation), which provides reciprocal visitor rights.

A Heritage Strategy for Jersey has recently been prepared by the Government, in collaboration with the main stakeholders Jersey Heritage, La Société Jersiaise and the National Trust for Jersey.

It was preceded by a Culture, Arts and Heritage Strategic Review by BOP Consulting in 2018.

It summarises elements of the island's heritage that are especially notable by comparison to other places. It includes:

- **Geology.** Jersey has a unique range of rock assemblages. The British Geological Survey notes that their importance to geologists lies principally in the magnificent coastal sections that expose rocks which preserve an intact record of local Precambrian and Palaeozoic events.
- **Prehistory.** Jersey has two sites and a collection of truly world-class importance. They are summarised in Section 6.3.
- **Fortifications.** Jersey has been contested territory throughout its history and has extensive remains of fortification from the prehistoric to the Cold War, including examples unique to the Island.
- **Maritime Heritage.** Jersey was once one of the largest ship building areas in Britain and a deep history of international trade and connectivity. Remnants that visitors can see include the island's smaller harbours, a legacy of the nineteenth century Oyster trade, a fleet of historic vessels and many fine homes which originated in the wealth of the transatlantic Cod trade.
- **The Jersey Occupation Archive.** It includes the Occupation Registration Cards, which form a pictorial census of the Islanders who were occupied. It is recognised of national significance by inscription in the UNESCO UK Memories of the World programme.
- **Jèrriais language.** Listed by UNESCO as critically endangered. It has potential to be used more to reinforce distinctiveness in place-making.

The strategy outlines a number of possible heritage-orientated projects.

Achieving designation of the island as a UNESCO Geopark is a primary project being led by Jersey Heritage. This would be international recognition of the significance of the Island's abiotic, biological and cultural heritage.

Some funding for the heritage sector is available through the Channel Islands Lottery. This funding is distributed through the Jersey Community Foundation, which has a heritage specific scheme, and the Association of Jersey Charities through its member organisations.

4.11 Outdoors

4.11.1 Cycling

Jersey caters well for cyclists with 11 bike hire companies 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. The innovative Jersey 'Green Lane' scheme, first introduced in 1993, provides routes that give priority to pedestrians, cyclists and horse riders over motorists.

Figure 37: Cycle Hire Shops and Cycle Tours

Cycle Hire
1 Aarons Bikes
2 Brompton Bike Hire
3 Edd's Eco bikes
4 Jersey Bike Hire
5 Lakeys Bike Hire
6 West Park Bikes
Cycle Tours
1 Edd's Eco bikes
2 Wild Adventures Jersey

Evie bikes provides a city-bike type of scheme which enables residents and visitors to hire for individual journeys. They have pick-up / drop-off stations at some hotels and plan to extend to other hotels. They only offer electric bicycles, however. There is no similar scheme offering normal bicycles.

The Island's small size and well-marked routes makes exploring the whole island by bike feasible. The terrain is mainly suited to hybrid / road bikes with a limited offer for off-road and racing. More serious road cyclists on a dedicated cycling / training holiday may find the size of the island limiting as they could quickly exhaust 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 38: Jersey Cycling Atlas

4.11.2 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 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.

4.11.3 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 39: Jersey Golf Courses

Course	Location	Holes
1 Les Mielles Golf and Country Club	St Peter	18 hole
2 Les Ormes Golf Course	Les Ormes	9 hole
3 Le Moye Golf Course	St Brelade	18 hole
4 Wheatlands Golf Club and Hotel	St Peter	9 hole
5 St Clements Golf and Sports Centre	St Clement	9 hole
6 The Royal Jersey Golf Club	Grouville	18 hole

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>

There are 3 mini-golf courses at Roccos Activity Centre in St Ouen's.

4.11.4 **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 c.170 drivers and navigators.

2022 saw the first Concours D'Elegance event in Jersey, displaying some of the finest cars in the world. The display was part of the opening of the Jersey International Motor Festival.

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

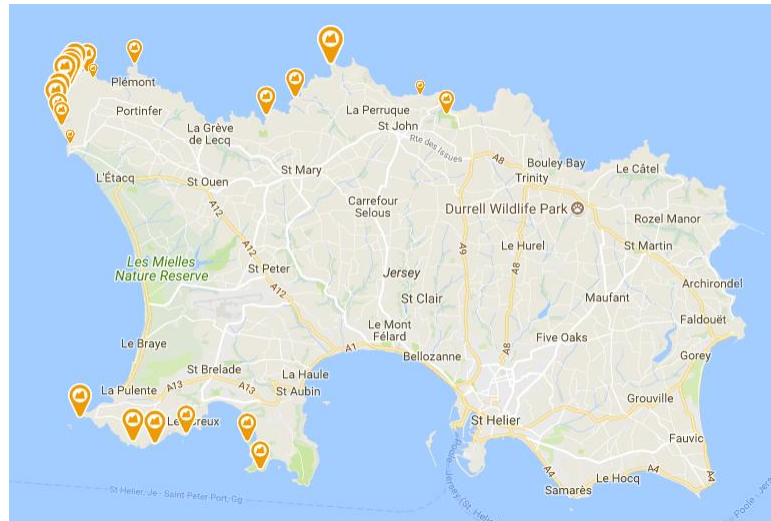
The annual Jersey International Motoring Festival is the largest motor show in the Channel Islands. The four-day event involves competitive sprint and hill climb races alongside motor/trade stands and exhibitions. In addition, the Mansell Collection also runs various events.

4.11.5 **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. Popular natural rock climbing spots include Grosnez and Trespass Point in St Brelade. Wild Adventures Jersey and Jersey Adventures offer climbing tours and activities.

There are indoor climbing walls at Langford Sports Centre and Grand Vaux Youth Centre, an outdoor wall at Valley Adventure Centre and an indoor traversing wall at Grainville School.

Figure 40: Jersey's Climbing Crag



Source: *Jersey Climbs - Guide Book*

4.11.6 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.

4.11.7 Sports Infrastructure

The accompanying database has a list of sports facilities on the island.

A strategy called Jersey's Inspiring Active Places Strategy sets out the Jersey Government's plan to redevelop and replace its existing sports facilities with a network of public sport and wellbeing hubs. This is a 10-year plan requiring investment of over £100m. A key element is decanting leisure facilities from Fort Regent. Les Quennevais is to be a new hub.

A first element of delivery of the strategy is an international standard concrete bowl skate park being constructed at Les Quennevais.

There is a privately owned high-performance fitness facility at Strive which has been successfully attracting professional sports teams such as the British and Irish Lions and leading football clubs.

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.

There is a similar situation with the Jersey Bulls Football team.

4.11.8 **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 is part of 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.

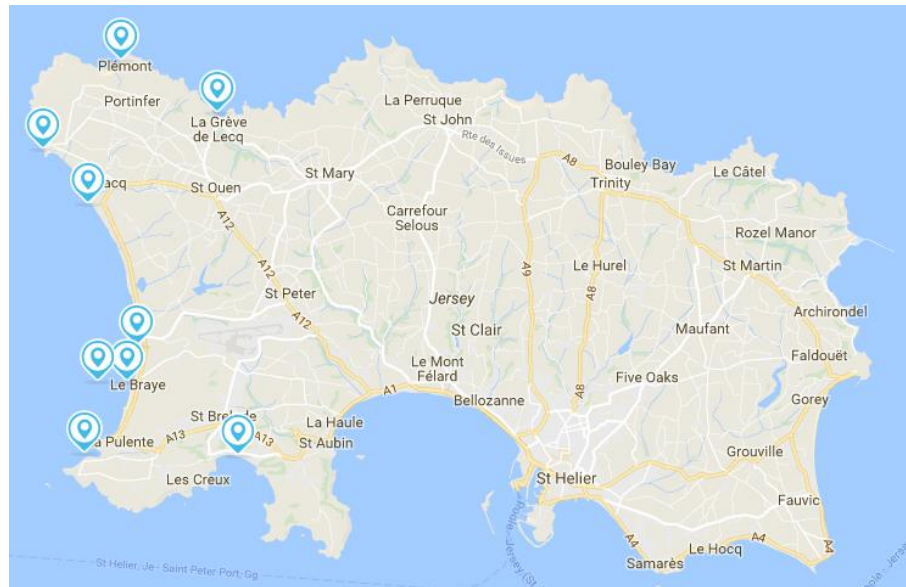
The annual Jersey Regatta hosts three days of racing for sports boat, cruiser/racer, cruiser, dayboat, dinghy, sport catamaran and Kona windsurfer classes. The races run alongside a shore-side social programme.

Yacht charter is available from the Island's main yacht charter company, Go-Sail.je. 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.

4.11.9 **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.

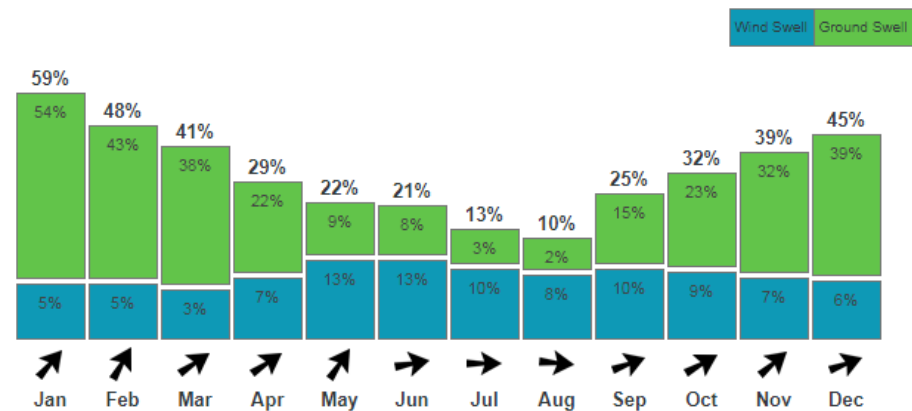
There are seven surf schools at St. Ouen's Bay offering board, wetsuit hire and summer camps. Jersey Surfboard Club has c.500 members and claims to be the oldest surf club in Europe. Various surf competitions are held on Jersey, including the Channel Islands Championships. There is a Flow Rider surf simulator at The Merton Hotel. Healing Waves is a charity that provides ocean therapy through accessible surfing and paddle boarding lessons.

Figure 41: Jersey surf spots

Source: Magicseaweed.com

Figure 42: Jersey seasonal surf averages

Swell Consistency and Wind Overview



This graph shows the percentage of days that had a ridable wind swell (7 seconds period or more) or groundswell (10 seconds period or more) of over 3ft. It also shows the dominant wind direction. Not all of these days will necessarily give great surf, and very short lived wind swells or longer period secondary swells may produce surf not recorded, but it gives a clear idea of the seasonal trend and a rough guide to the chances of scoring something ridable.

Source: Magicseaweed.com

4.11.10 Kayaking

Kayaking is a popular way to explore otherwise inaccessible areas of the island such as caves, coves, bays and islands. Kayaks can be hired on an hourly basis or part of a guided tour combined with other activities such as coasteering. They are organised by providers such as Jersey Kayak Adventures along with wider activity organisers such as Absolute Adventures, Wild Adventures Jersey, Jono's Watersports, Kayak Nomad and Gorey Watersports Centre.

4.11.11 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 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 2011 and lodged in the Island Plan. It is designed to offer the highest level of protection to areas that are most sensitive to development.

4.12 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.

The most significant public realm is the pedestrianised area of St Helier. That was implemented some 20-30 years ago now and is looking tired. 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.

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

4.13 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 Jersey Pearl and Catherine Best, selling crafted goods of quality,

Figure 43 shows the range of the shopping area in St Helier, with the pedestrianised area highlighted. The proportion of the central business district which is "pedestrian friendly" is lower than is typical of towns on the continent.

The database that accompanies the report has a list of retail-orientated businesses in the town centre. There are about 443, about 75 of which (17%) are chains. The proportion that are independent is considerably lower than most places in the UK. The independent character has been increased by the closure of UK chain shops.

Figure 43: High level GOAD map for St Helier



Source: Experian

Figure 44 shows that there is a diverse range of shops in St Helier. About 123 (17%) sell food and drink for immediate consumption. This proportion has been growing, as is the case in most other places. Many of the establishments have pavement or other outdoor seating. This has given the centre a more continental feel.

Figure 44: Types of businesses in St Helier

Hair and Beauty	44	Florist	4	Beauty	1
Restaurant / Bar	36	Phones	4	Body Shop	1
Café	30	Photography	4	Business Services	1
Jewellery	25	Shoes	4	Computer / Electronics	1
Clothing	22	Tattoo Studio	4	CTN	1
Ladies Wear	18	Children's Wear	3	Dance Wear	1
Estate Agent	17	Cycles	3	Discount Store	1
Public House	17	Department Store	3	DIY	1
Takeaway	13	Medical Service	3	Framing	1
Coffee Shop	12	Phone Services	3	Gallery	1
Gifts	11	Toys	3	Gun Shop	1
Bar	10	Accessories	2	Haberdashery	1
Home Interiors	20	Book Shop	2	Hardware	1
Supermarket	10	Car Spares	2	House Clearance	1
Betting	9	Cards	2	Household Goods	1
Menswear	9	Confectionary	2	Ice Cream	1
Bank	8	Dry Cleaning	2	Insurance	1
Travel Agent	8	Employment Agency	2	Ironmongery	1
Financial Services	7	Health Food	2	Maternity wear	1
Grocery	7	Party Goods	2	Music Shop	1
Pharmacy	7	Record Shop	2	Nursery Goods	1
Charity Shop	6	Shoe Repairs	2	Off Licence	1
Opticians	6	Sports Goods	2	Office Equipment	1
Restaurant / Bar	6	Alterations	1	Pet Shop	1
Appliances	4	Amusements	1	Post Office	1
Baker	4	Auctioneers	1	Stationery	1
Electronics	4	Baby Clothes	1	Tobacconist	1

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. The prime area is anchored by two substantial department stores. This is unusual now in a town of this size and, because they are independent and quality-orientated, is an attractive element of the retail offer.

There is a concentration of independent shops around the Central Market.

St Helier is rare for a town of its size in having an indoor market¹². The Central Market is tired, however. A review is currently underway. Various markets in the UK and on the continent have been revitalised by a focus on food that is served on the premises. Altrincham Market, the success of which is credited with revitalising a failing town centre, is a well-known example.

There are many shops of potential interest to tourists both in St Helier and in other locations, including several farm shops. The www.jersey.com website lists 70. Almost a half of them sell products which they make themselves.

Jersey Pearl is a substantial attraction. It has 675 reviews on Trip Advisor.

The 'Genuine Jersey' mark offers consumers the opportunity to identify and support local producers. It covers food and drink, arts and crafts. It now has 131 members. A Genuine Jersey market is held monthly from June-August and Christmas markets are held between November and December.

4.14 Weather

Jersey was the sunniest place in the British Isles in 2021 for the fourth year running¹³.

Figure 45 compares the average daily high temperature and the average number of days with rainfall between Cornwall, Jersey and two Mediterranean islands that are popular destinations.

It shows that Jersey is slightly warmer than Cornwall, but with much less chance of experiencing rain during May to September. Both are a lot cooler than the Mediterranean, especially during July and August.

¹² We studied the matter in 2017 for Market Harborough, a prosperous town in Leicestershire. The results are reported in our 2017 Jersey Tourism Audit report.

¹³ <https://jerseyeveningpost.com/news/2022/01/13/island-holds-on-to-sunniest-place-in-the-british-isles-title/#:~:text=JERSEY%20has%20retained%20the%20title,400%20hours%20ahead%20of%20Guernsey>

Figure 45: Comparison of Temperature and Rain Days

	Cornwall	Jersey	Ibiza	Santorini
Average High Temperature (Degrees Celcius)				
Jan	9	8	15	14
Feb	9	8	15	14
Mar	10	10	17	16
Apr	12	12	19	18
May	14	15	22	22
Jun	18	18	26	27
Jul	19	20	29	29
Aug	20	20	30	29
Sep	18	18	27	26
Oct	15	15	23	22
Nov	12	12	19	18
Dec	10	9	16	15
Rain Days				
Jan	16	14	4	10
Feb	12	11	4	9
Mar	13	11	4	7
Apr	10	9	4	4
May	9	8	2	3
Jun	9	6	1	0
Jul	9	6	0	1
Aug	10	7	1	0
Sep	11	8	3	2
Oct	14	12	5	4
Nov	16	15	5	8
Dec	15	14	5	9

5 Access

5.1 Air

Figure 46 shows scheduled flights to Jersey Airport in Summer 2022 (some will not take place in the winter), and Figure 47 shows seasonal charter flights. It shows good coverage to London and UK regional airports, but relatively poor links elsewhere. Ports of Jersey has confirmed that services are roughly 80% of pre-pandemic levels. Routes that have been lost include Edinburgh and Doncaster-Sheffield. The experience at the airport is middling. The terminal, especially arrivals, is tired.

Figure 46: Scheduled flights Summer 2022

Origin	Airline	Mon	Tue	Wed	Thu	Fri	Sat	Sun
UK								
Belfast	Easyjet		Y		Y		Y	
Birmingham	Blue Islands	Y	Y	Y	Y	Y	Y	Y
Birmingham	Jet2		Y					
Bristol	Blue Islands	Y	Y	Y	Y	Y	Y	Y
East Midlands	Blue Islands	Y		Y		Y	Y	Y
East Midlands	Jet2						Y	
Exeter	Blue Islands	Y		Y		Y	Y	Y
Glasgow	Easyjet	Y	Y		Y	Y	Y	Y
Guernsey	Blue Islands	Y	Y	Y	Y	Y	Y	Y
Humberside	Eastern Airways						Y	
Leeds Bradford	Jet 2		Y		Y		Y	
Liverpool	Easyjet	Y	Y	Y	Y	Y	Y	Y
London City	BA	Y				Y		
London Gatwick	BA	Y	Y	Y	Y	Y	Y	Y
London Gatwick	Easyjet	Y	Y	Y	Y	Y	Y	Y
London Heathrow	BA	Y	Y	Y	Y	Y	Y	Y
London Luton	Easyjet	Y	Y	Y	Y	Y	Y	Y
London Stansted	Jet2		Y					
Manchester	Easyjet	Y		Y	Y	Y	Y	Y
Norwich	Blue Islands						Y	
Southampton	Blue Islands	Y	Y	Y	Y	Y	Y	Y
Teeside	Eastern Airways						Y	
ELSEWHERE								
Dublin	Aer Lingus	Y			Y	Y	Y	Y
Dusseldorf	Eurowings						Y	
Lubeck	Lubeck Air						Y	
Munich	Lufthansa						Y	
Rennes	Blue Islands	Y				Y		

<https://cdn.ports.je/web/Summer-Timetable-2022.pdf>

Figure 47: Charter Flights (Seasonal)

Origin	Airline	Mon	Tue	Wed	Thu	Fri	Sat	Sun
Funchal	Estrela travel				Various			
Majorca	Flydirect.je		Y				Y	
Tenerife	Flydirect.je							Y
Malaga	Flydirect.je						Y	
Ibiza	Blue Islands						Y	
Kassel	Globalis						Y	
Zurich	Rolf Meier-Reisen AG						Y	Y
Bremen	Rolf Meier-Reisen AG						Y	
Hamburg	Rolf Meier-Reisen AG						Y	
Frankfurt	Rolf Meier-Reisen AG						Y	Y
Stuttgart	Rolf Meier-Reisen AG							Y
Memmingen	Rolf Meier-Reisen AG						Y	
Munich	Rolf Meier-Reisen AG						Y	
Nuremberg	Rolf Meier-Reisen AG						Y	
Dortmund	Rolf Meier-Reisen AG						Y	
Rostock-Laage	Rolf Meier-Reisen AG						Y	
Leipzig	Rolf Meier-Reisen AG						Y	Y
Berlin	Rolf Meier-Reisen AG						Y	Y
Erfurt-Weimar	Rolf Meier-Reisen AG							Y
Hanover	Rolf Meier-Reisen AG						Y	
Cologne	Rolf Meier-Reisen AG							Y
Munster-Osnabrueck	Rolf Meier-Reisen AG						Y	
Copenhagen	Amalgamated Travel Network			Y				Y
Dresden	Lufthansa						Y	
Paris	Blue Islands				Various			
Reus	Online Regional Travel					Y	Y	
Rotterdam	Blue Islands							Y
Sønderborg	Online Regional Travel				Y			Y

5.2 Ferry

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

Figure 48: Ferry Services to Jersey

Origin	Operator	Duration (hours)	Frequency per Week	
			2022	2017
Guernsey	Condor Ferries	1h	6	14
Poole	Condor Ferries	4h30	4	7
Portsmouth	Condor Ferries	10h20	6	7
St Malo	Condor Ferries	1h20	8	14
Carteret	Manche Iles Express	1h5	4	5
Granville	Manche Iles Express	1h25	3	9
Guernsey	Manche Iles Express	1h20	2	2
Sark	Manche Iles Express	1h10	3	4

Source: <https://en.calameo.com/read/004692869e58e100eb936>

5.3 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 11 visits in 2022, which is almost the same as 2017. The ships normally arrive in the early morning and depart in the late afternoon.

Figure 49: Cruise Ship visits 2022

	Date	Vessel	Capacity	Operator	Arr	Dep
1	Tue 5 Apr	MS Hamburg	420	Plantours	07.30	12.30
2	Thu 21 Apr	Ocean Nova	78	Antartica 21	07.00	19.00
3	Mon 16 May	Island Sky	118	Noble Caledonia		
4	Thu 19 May	Amera	835	Phoenix Reissen	09.00	17.00
5	Fri 3 Jun	Hanseatic Spirit	230	Hapag-Lloyd Cruises		
6	Mon 4 Jul	MS Hamburg	420	Plantours	07.00	18.00
7	Tue 19 Jul	Hebridean Princess	60	Hebridean Island Cruises	17.30	
8	Thu 21 Jul	MS Hamburg	420	Plantours	07.00	18.00
9	Wed 3 Aug	Seabourn Quest	540	Seabourn Cruises	08.00	17.00
10	Fri 12 Aug	Ocean Majesty	621	Hansa Touristik	16.00	24.00
11	Mon 29 Aug	Spirit of Adventure	999	Hapag-Lloyd Cruises	08.00	17.00

Source: <https://cdn.ports.je/web/Cruise-Calls-2022-v4.pdf>

5.4 Yachts

There are about 150 berths available in St Helier for visiting yachts and other boats¹⁴. Figure 50 shows arrivals from Jan to Aug 2020. July and August were much the busiest months.

Figure 50: Visiting Vessels, Jan-Aug 2020

Month	Number of People	Number of Vessels	% of Vessels
January	23	7	0%
February	14	6	0%
March	113	36	1%
April	326	87	3%
May	755	256	9%
June	974	344	11%
July	3,679	1,288	43%
August	3,077	981	33%
Total	8,961	3,005	100%

Source: Maritime Hubs Manager

Figure 51 shows that France is much the biggest country of origin.

¹⁴ Source: Maritime Hubs Manager

Figure 51: Countries of Origin of Visiting Vessels

Country	Vessels		Country	Vessels	
	No	%		No	%
France	1,801	60%	Other - EU	4	0.1%
United Kingdom	561	19%	Poland	4	0.1%
Guernsey	251	8%	Canada	3	0.1%
Holland	151	5%	Finland	3	0.1%
Germany	56	2%	Hungary	2	0.1%
Belgium	36	1%	Alderney	1	0.0%
Switzerland	21	1%	Amsterdam	1	0.0%
Jersey	17	1%	Australia	1	0.0%
Sweden	17	1%	Sark	1	0.0%
Denmark	14	0.5%	Spain	1	0.0%
Netherlands Antilles	7	0.2%	St Malo	1	0.0%
Ireland	5	0.2%	UNKNOWN	42	1%
Norway	4	0.1%	Total	3,005	100%

5.5 Parking

Parking on streets and in most public car parks is paid for with parking cards which can be bought shops and garages and by a PaybyPhone app. Sand Street Car Park has a pay station and it is not possible to use paycards there now. There is, apparently, insufficient parking in central St Helier. This may affect visitors, who might normally park in locations like the waterfront, more than locals.

5.6 Visitor information

Visit Jersey produces an official What's On guide to Jersey, an official visitor map and guides in French and German. They are of high quality in our judgement. They are available for free and prominently displayed on arrival at the airport and various other locations around the island such as the Tourist Information Centre and at other tourism businesses.

They also produce and distribute walking and cycling maps and maintain www.jersey.com.

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 located within the Bus Terminal. The need for physical tourist information centres has been reducing as it becomes so easy to access information online.

5.7 On Island Transport

5.7.1 Buses

Liberty Bus 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.

Figure 52: Liberty Bus Map



The main bus station is located off the Esplanade in St Helier and offers 23 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, although visitors to the island can benefit from a Discover Jersey pass, for 1, 2, 3 or 7 day unlimited travel.

5.7.2 Taxis and Hire Cars

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

UBER does not operate on the island. The Jersey Taxi Drivers Association has an app which enables people to order taxis.

Several stakeholders commented in 2017 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.

There is a choice of car rental companies including Evie, who provide a city car type of service with a fleet of electric cars.

Figure 53: Car Hire

- 1 Avis
- 2 Europcar Jersey
- 3 Evie
- 4 Hertz
- 5 Jersey Classic Car Hire
- 6 Signature Executive (Chauffeur service)

6 Specific Opportunities

6.1 Claude Cahun Gallery

Claude Cahun was an influential French surrealist photographer, sculptor, and writer. She moved to the Jersey in 1937 with her stepsister and lover Marcel Moore. She was active in opposing the occupiers in World War 2 and was imprisoned and sentenced to death (the sentence was not implemented).

Their house, La Rocquaise, is opposite the St Brelade's Bay Hotel, with a beautiful garden overlooking the bay. The garden, the house and the area around the bay were favourite settings for Cahun's work. The house is currently on the market with an asking price of £10 million.

Cahun has attracted a cult following internationally since being "rediscovered" in the 1980s. Jersey Heritage has the largest collection of her work. Artefacts from it are regularly sent to exhibitions abroad.

6.2 Fort Regent

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

An outline scheme has been developed by the government which was submitted for public consultation in 2021. It includes:

- Botanical gardens: ornamental planting, lawns, specimen trees, cafe/restaurants, formal 'hidden' gardens and pavilion.
- Bastion and rampart loop: ornamental painting, heritage trail, rampart loop walk, cafe and concession(s), woodland planting, play, pedestrian route connecting South Hill with Hill Street.
- Moat play: small play structures, sand and water play, picnic area for younger children and families.
- Active zone: outdoor adventure play, high ropes, large structures, netting and climbing.
- The Venue: multipurpose events venue for entertainment, conferences and exhibitions. 2,000 seated (3,200 standing) main auditorium, with surrounding breakout facilities, hospitality and meeting areas and a sky bar and cocktail lounge overlooking the winter gardens.
- Walkways in the sky: graded walkways winding through a nature landscape, shrubs, large trees, high canopies and water jets, water walls and water misters. A place to get lost in nature, read a book or splash in the water area. Accessible to all. Travel 20 metres high up into and over the tree canopy and walk among the treetops.

- Leisure zone: boutique ten pin bowling, multi-screen cinema, flexible leisure box for a range of activities including soft play, trampolines and laser quest.
- Casino: a high quality small to medium casino to include state of the art table and machine gaming and a full-service restaurant, bar and waitress service.
- Hotel: 150 bedroom independent hotel with restaurant, leisure and spa and small meeting room spaces.
- Food and beverage: a range of food and beverage outlets across the site including a food area in the main plaza.

<https://www.gov.je/Government/capitalprojects/FortRegent/Pages/ProposedPlansFortRegent.aspx>

6.3 Prehistoric Heritage

Jersey has two sites and a collection of truly world-class importance that could become a major attraction.

6.3.1 **La Cotte de St. Brelade**

La Cotte is one of the most important Middle Palaeolithic sites in northern Europe. It contains remains of unbroken human presence for over 200,000 years. This makes it perhaps the world's most comprehensive resource for understanding Neanderthal development.

6.3.2 **La Hougue Bie**

One of the largest and best preserved Neolithic passage graves in Europe. It is one of the ten oldest known buildings in the world, older than the Pyramids.

6.3.3 **Le Catillon II Hoard**

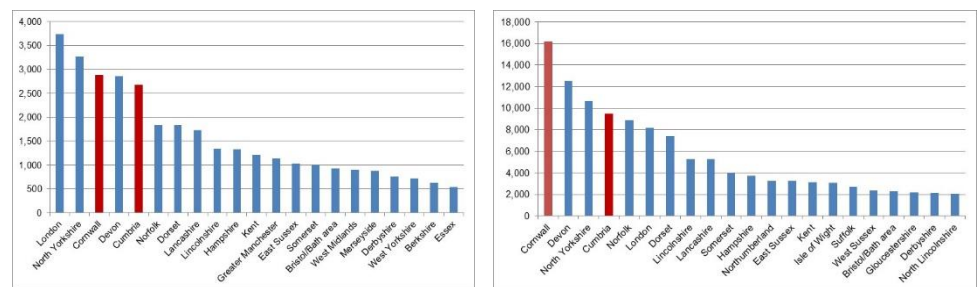
This was one of the most important archaeological finds in the world in recent times. A hoard of 70,000 coins, plus an impressive range of Iron Age Jewellery, was discovered by detectorists in 2012. It was acquired by the Government of Jersey in 2021 and is conserved by Jersey Heritage.

7 Comparisons

The brief for the study requested comparison with places in the UK 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 leisure tourism, as opposed to business tourism. Results from the Great Britain tourism survey are no longer provided by county, unfortunately, but Figure 54 shows the number of trips for purpose of holiday from 2013-2015. It shows that 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 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 54: 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 is misleading, however, because of difference in physical and market size. Jersey is about 45 square miles in size and had 439,200 overnight holiday visits during 2019. 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.

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.

Another significant difference between Jersey and places like Cornwall and the Lake District is that business tourism is a bigger factor in Jersey, mainly because of the size and strength of the financial services sector in Jersey.

Comparisons are made below with Cornwall, the South Lakeland District of Cumbria, which includes Windermere, and Bath.

The reason for choosing Bath is that it is similar in population to Jersey (about 100,000 residents) and has a mixture of leisure and business tourism

Figure 55: South Lakeland District



7.1 Accommodation

7.1.1 Hotels

Figure 56 compares hotel stock for Jersey, Bath, Cornwall and South Lakeland using, for the comparator areas, data from CoStar. They are grouped according to the rating system used by CoStar¹⁵.

Figure 56: Hotels

	Jersey		Bath		Cornwall		South Lakeland	
	No	%	No	%	No	%	No	%
PROPERTIES								
Luxury	2	4%	7	11%	10	3%	8	4%
Upscale/ Upper Upscale	16	32%	10	16%	25	7%	59	28%
Upper Midscale	15	30%	20	33%	158	45%	72	35%
Midscale / Economy	17	34%	24	39%	161	45%	69	33%
Total:	50	100%	61	100%	354	100%	208	100%
ROOMS								
Luxury	152	5%	302	13%	339	6%	466	10%
Upscale/ Upper Upscale	1,184	36%	622	26%	782	13%	1,565	35%
Upper Midscale	1,320	40%	595	25%	158	3%	1,074	24%
Midscale / Economy	629	19%	857	36%	4,545	78%	1,399	31%
Total:	3,285	100%	2,376	100%	5,824	100%	4,504	100%
ROOMS PER PROPERTY								
Luxury	76		43		34		58	
Upscale/ Upper Upscale	74		62		31		27	
Upper Midscale	88		30		1		15	
Midscale / Economy	37		36		28		20	
Total:	66		39		16		22	

Source: CoStar

¹⁵ For Jersey, 5 star has been allocated to Luxury, 4 star to Upscale/Upper Upscale, 3 star to Upper Midscale and 2 star to Midscale / Economy.

The CoStar database has the date of construction of most properties. It is probably not entirely reliable, partly because properties that are now hotels were not necessarily built as such. It shows, however, that Jersey has a higher proportion of stock built since 2010 than Cornwall and South Lakeland, but less than Bath.

Figure 57: Age of Hotel Stock

	Jersey				Bath			
	Hotels		Rooms		Hotels		Rooms	
	No	%	No	%	No	%	No	%
Pre 1900	9	18%	225	7%	30	49%	1,241	44%
1900-1999	35	70%	2,567	78%	23	38%	897	31%
2000-2009	3	6%	85	3%	2	3%	197	7%
2010-2022	3	6%	408	12%	6	10%	516	18%
Total	50	100%	3,285	100%	61	100%	2,851	100%

	Cornwall				South Lakeland			
	Hotels		Rooms		Hotels		Rooms	
	No	%	No	%	No	%	No	%
Pre 1900	149	38%	2,529	29%	147	62%	2,950	63%
1900-1999	212	54%	4,834	55%	77	33%	1,388	30%
2000-2009	19	5%	773	9%	3	1%	106	2%
2010-2022	14	4%	703	8%	9	4%	215	5%
Total	394	100%	8,839	100%	236	100%	4,659	100%

This reflects a trend of the past three decades that most hotel development has been in city centres and major transport hubs. The proportion of the stock in any regional city in Britain will be higher again than Bath. This is because of the mix of business and leisure tourism in cities supports higher occupancy and rates than in rural areas.

Figure 58 shows hotels that operate under a brand in each of the four areas and the percentage of the overall room stock they represent. It illustrates another trend of the past 30 years: most hotel stock in cities and at transport hubs is, as in Bath, in branded properties; most hotel stock in rural and coastal destinations, by contrast, continues to be non-branded. It also shows that the branded stock in the rural areas is dominated by the “budget”¹⁶ sector, especially Premier Inn and Travelodge. Cities like Bath have, by contrast, a wider range of brands.

¹⁶ This is not necessarily a fair term. They are mid-market.

Figure 58: Hotels operating under a brand¹⁷

Hotel	Rooms	Co-Star Rating	Hotel	Rooms	Co-Star Rating
JERSEY			BATH		
Radisson Blu	195	Upper Upscale	Apex	177	Upper Upscale
Premier Inn (Charing Cross)	122	Economy	Hand Picked	89	Upper Upscale
Premier Inn (Bath Street)	91	Economy	Hotel Indigo	166	Upper Upscale
Best Western Royal	89	Upper Midscale	Tribute Portfolio	65	Upper Upscale
Total:	497		DoubleTree by Hilton	176	Upscale
% of all Rooms:	15%		Macdonald	131	Upscale
CORNWALL			Radisson Individuals	66	Upscale
Wyndham	10	Upscale	SACO	52	Upscale
Brend Hotels	45	Upper Midscale	Hall & Woodhouse	9	Upper Midscale
Holiday Inn Express	71	Upper Midscale	Hampton by Hilton	202	Upper Midscale
Best Western	38	Midscale	Holiday Inn Express	145	Upper Midscale
Best Western	74	Midscale	Best Western	60	Midscale
OYO	16	Economy	OYO	15	Economy
OYO	25	Economy	Premier Inn	107	Economy
Premier Inn	67	Economy	Travelodge, UK	66	Economy
Premier Inn	65	Economy	Travelodge, UK	125	Economy
Premier Inn	86	Economy	Travelodge, UK	56	Economy
Premier Inn	77	Economy	Z	149	Economy
Premier Inn	44	Economy	Total:	1,856	
Premier Inn	108	Economy	% of all Rooms:	79%	
Premier Inn	114	Economy	SOUTH LAKELAND		
Premier Inn	67	Economy	BW Premier Collectic	57	Upscale
Premier Inn	74	Economy	BW Premier Collectic	99	Upscale
Premier Inn	110	Economy	Days Inn	36	Economy
Premier Inn	67	Economy	Macdonald	106	Upscale
Premier Inn	83	Economy	Premier Inn	92	Economy
Premier Inn	61	Economy	Premier Inn	79	Economy
Travelodge, UK	68	Economy	Travelodge, UK	47	Economy
Travelodge, UK	39	Economy	Travelodge, UK	43	Economy
Travelodge, UK	42	Economy	Travelodge, UK	69	Economy
Travelodge, UK	67	Economy	Total:	628	
Travelodge, UK	76	Economy	% of all Rooms:	14%	
Travelodge, UK	55	Economy			
Travelodge, UK	63	Economy			
Total:	1,712				
% of all Rooms:	29%				

We know from having done similar studies to this in Cumbria over the past 20 years that there has, as in Jersey, been a big reduction in the number of hotel rooms. This has been, as in Jersey, largely the result of 2* and, to a lesser extent, 3* property being converted to residential. The Lake District now has little at the bottom end of the market.

A far lower proportion of properties in both South Lakeland and Cornwall have wet leisure facilities than in Jersey. 27 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 30¹⁸.

The spas at the Hotel de France, the Grand Jersey, the Club, L'Horizon, and also Spa Sirène at The Royal Yacht Hotel, 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).

¹⁷ Other hotels are in marketing consortiums. L'Horizon and the Grand Jersey are, for example, in Hand Picked Hotels (as is Bailbrook House Hotel, in Bath).

¹⁸ Source: Colliers research for Millendreath resort project.

7.1.2 Self-Catering

Another major tourism trend, which has been evident for at least 30 years, is a preference for staying in self-catering rather than serviced accommodation. This used to be particularly true for longer holidays but, with the advent of booking services like Airbnb, it is now true also for short breaks.

Figure 59 shows active listings on Airbnb in each of the areas at 10 July 2022.

Figure 59: Active Listings on Airbnb

	Jersey		Bath		Cornwall		South Lakeland	
	No	%	No	%	No	%	No	%
Studio	10	6%	41	3%	468	3%	40	2%
1 Room	70	41%	452	35%	4,459	25%	570	24%
2 Rooms	37	22%	410	32%	6,254	36%	857	36%
3 Rooms	40	23%	182	14%	4,089	23%	582	25%
4 Rooms	11	6%	103	8%	1,557	9%	186	8%
5 Rooms	4	2%	96	7%	662	4%	129	5%
Total	172	100%	1,284	100%	17,489	100%	2,364	100%
Rooms	338		2,751		39,240		5,459	
Per prop:	2.0		2.1		2.2		2.3	
Vs Hotels	10%		117%		674%		94%	

Source: AirDNA

It shows a profound difference between Jersey and the other areas. The number of rooms that are available on Airbnb is about 10% of the number of hotel rooms in Jersey. Bath and South Lakeland, by contrast, have a similar level of rooms offered on Airbnb as their entire hotel bed stock. Cornwall has almost 7 times as many.

The average size of the properties on offer in Jersey is less than the other areas, especially Cornwall.

This understates the difference in the amount of self-catering compared to South Lakeland and Cornwall because they both have large holiday camps with static caravans and /or chalets. We worked recently on one with several hundred units which is being constructed near Newquay.

7.2 Attractions

The tables in this section are extracted from an annual survey done by Visit England of visits to visitor attractions. It is not comprehensive because many attractions, especially those in the commercial sector, choose not to disclose their visitor numbers. There are many other popular attractions like petting farms that do not feature. The latest data is for 2020, but 2019 has been used because 2020 results were badly affected by the Pandemic.

Figure 60 shows that Cornwall has a great number and diversity of attractions. The Eden Project is the top ticketed attraction, but its visitor numbers are in gradual decline.

Tate St Ives is the primary cultural attraction. It reopened in 2017 after a major extension and upgrade in recent years. St Ives was an artist's colony of international significance in the mid-20th Century. The Tate is the focal point of a large number of galleries in the area.

Figure 60: Cornwall Visitor Attractions

Attraction	Visits	Price
Land's End		N/A Free
Eden Project	1,010,095	N/A
St Michael's Mount	359,554	£10.00 and over
Minack Theatre	305,356	£5.00 - £7.49
Tate St Ives	278,747	£7.50 - £9.99
Lanhydrock House and Garden	275,079	N/A
Trelissick Gardens	227,681	£7.50 - £9.99
Cotehele	175,565	£7.50 - £9.99
Tintagel Castle	154,996	£10.00 and over
National Maritime Museum Cornwall	110,386	£10.00 and over
Bude Castle Heritage Centre	99,387	Free
Glendurgan Garden	90,786	£5.00 - £7.49
Pendennis Castle	82,107	£10.00 and over
Trerice	74,991	£5.00 - £7.49
Trengwainton Garden	67,037	£5.00 - £7.49
Tintagel Old Post Office	55,329	£5.00 - £7.49
Godolphin House	51,824	£5.00 - £7.49
National Lobster Hatchery	44,440	£3.00 - £4.99
The Museum of Witchcraft	42,563	£5.00 - £7.49
Antony House and Garden	37,415	£7.50 - £9.99
St Mawes Castle	31,816	£7.50 - £9.99
The Levant Mine and Beam Engine	28,972	£7.50 - £9.99
Penlee House Gallery & Museum	28,917	£5.00 - £7.49
Restormel Castle	23,702	£5.00 - £7.49
Launceston Castle	16,000	£5.00 - £7.49
The Jackson Foundation Gallery	15,000	Free
East Pool Mine	13,048	£10.00 and over
King Edward Mine	2,784	£7.50 - £9.99

Source: Visits to Visitor Attractions

The Roman Baths are the primary attraction in Bath. They are owned and managed by the Bath and North East Somerset Council, which also owns and manages the Bath Fashion Museum and Victoria Museum and Art Gallery, which are not on the list. The Council is planning a new museum for the Fashion Collection, which has a world class collection that was donated to the city. The Holbourne Museum, also not on the list, is the main cultural venue. It is run by a trust. Bath Abbey reopened in 2021 after a renovation that cost almost £20 million, with core funding from the National Lottery Heritage Fund. It includes an innovative new heating system using the thermal waters.

People can enjoy the thermal waters at the Thermae Bath Spa, which was built with large investment from the Council and the National Lottery.

Figure 61: Bath Visitor Attractions

Attraction	Visits	Price
Roman Baths	1,325,085	£10.00 and over
Bath Abbey	517,838	Free
Number One Royal Crescent	61,981	£10.00 and over
Prior Park Landscape Garden	46,322	£5.00 - £7.49
American Museum	32,804	£10.00 and over
The Museum of Bath Architecture	5,280	£5.00 - £7.49
Beckford's Tower & Museum	2,085	£3.00 - £4.99

South Lakeland also has a diverse range of attractions. Boat trips on Windermere and Ullswater are the most popular. The new Windermere Steam Museum, in a prime location on Lake Windermere, opened in 2020. It cost £13.4 million, with £9.4 million coming from the National Lottery Heritage Fund. It was short listed for the 2021 Stirling Prize for Architecture.

Figure 62: South Lakeland Attractions

Attraction	Visits	Price
Windermere Lake Cruises, Bowness	1,613,785	N/A
Ullswater Steamers	500,200	£10.00 and over
Ravenglass & Eskdale Railway Co Ltd	212,000	£10.00 and over
Sizergh Castle and Garden	127,335	£7.50 - £9.99
Lakeland Motor Museum	76,997	N/A
Townend	16,816	£7.50 - £9.99
Stott Park Bobbin Mill	8,971	£7.50 - £9.99

7.3 Eating and Drinking

Figure 63 shows that there is a large number of restaurants in each of the three areas.

Figure 63: Restaurants listed by Trip Advisor¹⁹

Jersey	340
Bath	422
Cornwall	1,967
Windermere	224

Figure 64 shows that Jersey has a similar number of entries in the Michelin Guide to Bath, but less than South Lakeland and Cornwall.

¹⁹ Trip Advisor does not recognise South Lakeland, so Windermere is used instead. It will understate the number of restaurants across the whole district.

Figure 64: Restaurants listed in Michelin Guide UK

	Listed	1 Star	2 Star	3 Star
Jersey	11	1		
Bath	10	1		
Cornwall	44	3		1
South Lakeland	18	4		

There are big clusters of Michelin listed restaurants in Padstow (Cornwall) and Ambleside (Lakeland), with seven each. Cartmel (Lakeland) and St Ives (Cornwall) have three each. St Helier has four.

7.4 Events

There are events listings on the websites of Visit Cumbria, Visit Cornwall and Visit Bath. Perusal of them shows that there are many events of different type in each of the locations, as there are in Jersey.

We analysed the events programme in South Lakeland in 2017 found that there was a similar number of significant events in South Lakeland as in Jersey. The profile was different, however, with more festival-type events and less that are physical-activity oriented.

8 Product Sectors

We were asked to assess examples of product in seven sectors.

8.1 History & Heritage

Heritage is a primary reason for visiting destinations, but not necessarily in the most obvious way.

We have done much research relating to the heritage impact of heritage assets. This has included:

- Assessments of the economic impact of the heritage of the Northwest of England²⁰, Yorkshire²¹ and England²².
- Assessments of the business uses of listed buildings in towns and cities across the United Kingdom and comparison to non-listed buildings²³.
- Assessment of impact of conservation areas in the development of creative industries²⁴.

The impact on tourism has been a major consideration in each case.

As a basic principle, people visit places to see actual things. They seldom visit places simply because there is some story or individual connected to it. Attempts to create artificial attractions based on the history of places or individuals have a poor track record. An attraction about Charles Dickens immediately outside Chatham Historic Dockyard, where his father worked when he was a child, illustrates the point. It was created at large cost and seemed to have popular appeal. It failed to attract enough visits to be sustainable, however, and closed after failed attempts to revitalise it.

The National Centre for Popular Music in Sheffield is another illustration. It was built at great cost in an “iconic” building but failed from the start. It was converted to a student union.

Heritage can be divided into two main categories in its influence on visitor behaviour: **heritage landmarks** and **heritage environments**.

Landmarks are individual buildings and sites which entice visits. Jersey has a good selection, as outlined in Section 4.8. People typically go into them, but not necessarily so. Many people go to look at landmark buildings from the outside without venturing in. La Corbiere Lighthouse is a good example of that.

²⁰ For the Northwest Regional Development Agency.

²¹ For Yorkshire Forward.

²² For Historic England.

²³ 2012, repeated 2018, for Historic England and the National Lottery Heritage Fund.

²⁴ Historic England.

Every part of the world has heritage landmarks. The level of their appeal to visitors depends on many factors, including:

- How impressive they look.
- How famous they are.
- What their surrounds are like.

The ability of any place to affect this is, of course, limited because heritage assets cannot be manufactured. Places can make heritage assets accessible to the public and can make them appealing. Figure 65 is an example of a new heritage attraction we experienced recently that has been done in an imaginative way.

Figure 65: Hieronymus Bosch House, Den Bosch, Holland

This is the medieval house of the world famous painter Hieronymus Bosch, who was active in the early 16th Century. It is on the market square. It has recently been restored to be a visitor attraction. This has involved bold, but respectful, insertions to enable access to all floors. The house is interpreted in an imaginative way. Visitors go from room to room. There is a “show” lasting about 5 minutes in each of the rooms, each telling a different aspect of the story, projected onto the walls of the rooms. It is a memorable experience. Another attraction in the town has digital reproductions of Bosch’s works.

The other type of heritage that affects tourist visits is **heritage environments**.

This is groupings of historic structures.

Our studies concluded that heritage environments probably have about 10 times more impact on tourism than heritage landmarks.

This is, ultimately, because of a human instinct that means that people enjoy being in environments where they can feel a sense of antiquity.

The studies found that:

- There is a strong correlation between the popularity of places to visit and the “density” of heritage assets they have.
- Places with heritage that “feels” Medieval or Georgian tend to be more popular to tourists than places with heritage that feels Victorian or Twentieth Century. This is why places like Bath and York are the most popular tourist cities in Britain.
- Heritage environments nurture a different type of offer in towns and cities than more modern parts. It tends to be more orientated to distinctive, independent businesses and to have a higher element of food and beverage.

Investment in public realm and in increasing the quality of historic buildings that form heritage environments is the key to making the most of them. Holland is especially good at doing so.

Coal Drop Yards, behind King's Cross Station in London, is a world class example of imaginative treatment of a heritage environment.

It illustrates what could be possible in making St Helier a more attractive visitor destination.

8.2 Arts & Culture

Many places have used investment in visual and / or performing arts as a means of attracting visitors and changing their image.

It is not easy to do, however, especially when, as in Jersey, it has to be sustained by a small local population.

It is rare for performing arts to be the main focus of this, although there are some exceptions. Shakespeare North, a version of the replica of Shakespeare's Globe in London, is currently being built in Knowsley on Merseyside, for example. Its aim is to be a major destination.

Investment in visual arts is more common.

The Guggenheim in Bilbao is especially famous, but there are many other examples.

The Turner Contemporary gallery in Margate is credited with playing a leading role in the regeneration of the former resort town, which was suffering from severe socio-economic depression as a result of the decline of domestic seaside holidays. The town has, in addition to becoming more popular with visitors, attracted many individuals and businesses that are involved in creative industries. The gallery was built at a cost of £19 million in 2011. It only has a small permanent collection. The programming is, instead, exhibitions, mainly of contemporary art, but some of which come from the Tate collection. It has a revenue subsidy of about £800,000 annually from Arts Council England and Kent County Council.

Turner Contemporary was unusual in that it was not based on an existing collection. It was made possible by partnership with the Tate in providing exhibitions with it.

The De La Warr Pavilion in the seaside town of Bexhill is another example. It was an existing building, an iconic art deco pavilion that had fallen into disrepair. It was restored with funding from the National Lottery Heritage Fund. It has programming of both contemporary art and live performance, mainly music. It is very popular as a place to eat and drink, with more than £1 million per annum turnover from that. It also has a subsidy of about £800,000 per annum, half of which is provided by Arts Council England and half of which is provided by the local authority.

Nearby Folkstone has been regenerated with an emphasis on creative industries, in that instance funded by a private charity set up by Roger de Haan from the proceeds of selling Saga. It has focused especially on acquiring and restoring property in the old town for use by creatives. It also organises a Triennial contemporary art festival.

The large number of galleries and other creative activities on the coast in that part of England is being promoted as “The Creative Coast”.

Most visual arts attractions are unlike Turner Contemporary in that they start with a collection, often created by an individual and left as a bequest. The reason for this is that it is normally even more difficult to fund the acquisition of art of quality than to fund an outstanding building to accommodate it.

Some examples that illustrate the point are:

- **Kunstmuseum Stuttgart.** This is an outstanding museum of 21st and contemporary art in a landmark building in the main civic area in the centre of Stuttgart. The “cubic” building with 5,000 m² of display space was designed by Berlin architects Hascher and Jehle. It looks like a glass cube by day. The interior lighted limestone walls become visible at night. The museum originated from a civic collection donated Marchese Silvio della Valle di Casanova in 1924. The city made an enlightened decision, after World War II, to allocate funds to acquisition of art. They focused at the outset on collecting work by local artist Otto Dix, a leading Expressionist whose work was suppressed by the Nazis. They now have a world class collection that forms the heart of the displays. It is supplemented by exhibitions.
- **The outstanding Van Abbemuseum in Eindhoven, the Netherlands,** a museum of modern and contemporary arts. It originated in a collection assembled by Henri van Abbe, a private collector and local cigar manufacturer. Eindhoven City Council purchased the collection in 1934. The Van Abbe factory, in return, paid for and donated the museum building, which opened in 1936. Acquisitions have been made steadily and include pieces by Pablo Picasso, Wassily Kandinsky and Piet Mondrian. A large extension, which included a 27-metre-high tower, was designed by Abel Cahen and opened in 2003. It attracts about 100,000 visitors per annum.

It is because of the necessity of having a collection of quality at the heart of a any cultural facility that is likely to be successful in attracting visitors that the collection of Claude Cahun seems to offer the most obvious potential for Jersey. Her work and her story are both exceptionally interesting.

Another strategy that has been used in different places is commissioning outdoor art and architectural installations, sometimes forming a type of trail.

There is one along the Irwell River through Manchester, for example. Various installations have been created in Kielder Forest Park in Northumberland and are relatively popular.

8.3 Food Tourism

8.3.1 Foodie Destinations

Many places have become major destinations having become famous for food. Examples are:

- Ludlow, Shropshire. Its reputation started with a public campaign in opposition to proposals to build a supermarket in the town centre because of its anticipated impact on independent businesses. Traders and other stakeholders combined to create a food festival that was a major success. It will take place from 9-11 Sep 2022. This in turn led to the market having a food-orientation and a cluster of top-quality chefs opening restaurants in the town. There are five restaurants in the town with one or more Michelin stars, an exceptional concentration.
- Cartmel, South Lakeland. This attractive but quiet village on the edge of the Lake District has become a place of pilgrimage for gastronomes as a result of a single restaurant, L'Enclume, created by the chef Simon Rogan.
- Padstow, Cornwall. This has been achieved largely as the result of the work of Rick Stein. It has resulted in a cluster of high quality places to eat.

8.3.2 Artisan / Street Food Markets

Artisan / street food markets have become very popular and are now seen in many places.

An exceptionally good example is the Time Out Market in Lisbon, which is the city's most popular attraction.

Altrincham Market pioneered the concept in the UK. The historic market hall was refurbished to create a food hall emporium. Nick Johnson, an entrepreneur, won a tender to operate it. He put £200,000 into the venture. Trafford Council contributed £500,000. It has been exceptionally successful and is credited with transforming the fortunes of Altrincham town centre. The operators opened a version at the former Mackie May market on the edge of the Northern Quarter in Manchester, and the Picturedrome, a historic former cinema in Macclesfield, which have been similarly successful.

Brighton City Council has followed a similar formula with its restoration of the grade II listed Shelter Hall on the beachfront.

The upper part is a champagne and oyster bar.

The lower area, which is about 145 m², has been let to eight existing local restaurant / bar operators: Toasted GB Charcuterie and Seafood; Clean Kitchen Club (burgers); Curry Leaf Café; Brighton Coffee Works; Lost Boys Chicken; Fatto Pizza; and Carlito Burrito. It has been very popular since opening.

Figure 66: Brighton Shelter Hall



Another good UK example is Mercato Mayfair, off Oxford Street in London. It is located in a grade 1 listed former church called St Marks. The church was derelict for many years and on the national Heritage at Risk register. It is run by an Italian company, Mercato Metropolitano. They created a similar type of market in Milan in 2015, regenerating a 150,000 sq. ft. disused railway station. 2 million people visited in the first four months.

8.3.3 Farmer / Gourmet Food Markets

Markets that sell food produced by farmers have also been getting increasingly popular. London has several outstanding examples, including one at Duke of York Square, near Sloane Square.

8.3.4 Food Events

These are often the most popular type of event. The Whitstable Oyster Festival is a famous example that works well because it highlights a type of food which the local area has particular strength in. It has given Whitstable a reputation as a foodie destination that attracts visits all year round.

Cornwall has several, including Porthleven Food Festival which takes place between 22-24 April and is located around Porthleven Harbour.

<https://www.porthlevenfoodfestival.com/>

8.4 Sustainable Tourism

A survey for the Mintel report Sustainability in Travel, 2022²⁵ found that 28% of Britons say that the environment is more important to them than before the pandemic. Few, however, were preparing to cut back on travel in consequence.

²⁵ Survey of 1,783 internet users aged 16+ who are planning to go on holiday in next 3 years. Kantar Profiles / Mintel.

75% wanted to do more to minimise their impact on the environment whilst travelling. They found that 42% are "wannabe ethical travellers" – those who want to do more to minimise their impact on the environment but are not willing to compromise on the holiday experience.

9% of respondents identified as "hard ethical" travellers, likely to prioritise ethical environmental factors when booking.

28% identify as "soft ethical".

17% said they had stayed in eco-friendly accommodation in past 3 years

12% said they had rented a hybrid or electric bike.

43% of respondents said they eat a plant based diet some or all of the time. This is 52% of 25-44 year olds. Holiday companies are starting to introduce new vegan options, from specially curated vegan menus to cruelty-free resorts.

The following were identified as important when it came to sustainable practice – recycling waste 45%; reducing food waste 38%; reducing carbon emissions 37%; sustainable energy water use in accommodation 29%; supporting local community projects 27%; tackling overcrowding in popular destinations 24%; animal welfare 22%; providing sustainable food 21%.

66% said that travel companies should provide clear evidence of how they reduce/offset carbon emissions.

The report lacks specific ideas as what can be done, however. It provides one case study of a hotel that is taking a radical approach.

Figure 67: Room2, London

Room2 opened a fully net-zero (emissions) "hometel" in West London in December 2021. The Hometel concept is intended to combine the benefits of hotels, serviced apartments and Airbnb. Emissions of the entire homotel's lifecycle will be offset. The operators expect the building to be 89% more energy efficient than the typical UK hotel on a per sq m. basis. Initiatives include ultra-energy-efficient lighting in combination with occupancy sensors and a green roof with soil, wildflowers beehives and bug hotels. The homotel designs and manufactures its own bespoke bin to include waste, recycling and food waste, in collaboration with local artisans.

Other examples the report offers are:

- Byway gas created a new online trip builder to help carbon-conscious consumers enjoy plant-based holidays.
- Slow travel – Lumo, a new wholly electric service between London and Edinburgh. Renewably powered long-distance services.
- Swiss Federal Rail plan to be entirely run on renewables by 2025.

The Visit Cornwall website states that Cornwall has some of the country's best eco hotels and accommodation providers.

The Budock Vean won a Gold Award with the International Green Tourism Business Scheme. Their green initiatives include biomass heating, electric car charging points and composting for their sub-tropical gardens.

The Greenbank Hotel and the St Michael's Resort in Falmouth have also both won awards for their sustainable credentials.

Larger luxury hotels such as The Scarlet Hotel put eco-accommodation and sustainability at the heart of their practices and policies.

Activities include:

- Rainwater harvesting.
- Banning harmful plastics.
- Incorporating heating derived from waste.
- Low-energy use policy across all fixtures and fittings.

8.5 Nature/ Wildlife / The Great Outdoors

8.5.1 Cycling and Walking Holidays Report

The Mintel report Cycling and Walking Holidays 2021 investigates trends in taking holidays that involve walking or cycling.

It surveyed over 1,000 regular tourists. It asked which of the following holidays they would be interested in going on in the future. The responses were:

- City break - 63%
- Beach/seaside holiday 62%
- Camping / Caravanning - 29%
- Walking holiday (i.e. walking main element) - 28%
- Self-drive touring – 25%
- Coach / escorted touring holiday 18%
- Other physical activity holiday (e.g. snow ports, golf) - 13%
- None of these 10%

It found that 89% of those interested in going on walking / cycling holidays would like to go in UK, 53% in Europe, 30% outside Europe.

It concluded that cycling and walking holiday customers fall roughly into three groups:

- Soft Peddlers and Strollers. About 33%. Prefer easy itinerary based on 2-4 hours walking or cycling on flatish terrain.
- Moderate Mobiles – 50% of potential customers. Prefer higher level of activity but not too extreme. 5-6 hours daily, including some climbing.
- Challenge Riders and Striders. 14%, of which 3% are “hard core” group.

The main reasons for taking holidays that feature walking or cycling were:

- To spend time outdoors - 62%
- Improve physical fitness - 44%
- Have an adventure – 42%,
- Improve my mental wellbeing e.g. stress relief - 40%
- To get off the beaten tourist track - 37%
- Complete a personal challenge - 18%
- Have a green / low carbon holiday - 17%

45% said they were willing to pay for luggage transportation, 43% for full route planning and navigation, 36% for mobile call out / support service in case of tiredness or injury.

Following an itinerary specially planned around a theme such as history of gastronomy was attractive to 45% of potential customers.

The Active Travel Groups was formed in 2017. It offers cycling and walking holidays via the brands Wilderness Scotland, Wilderness Ireland and the recently launched Wilderness England, and the cycling holiday brands BSpoke and Cycling for Softies.

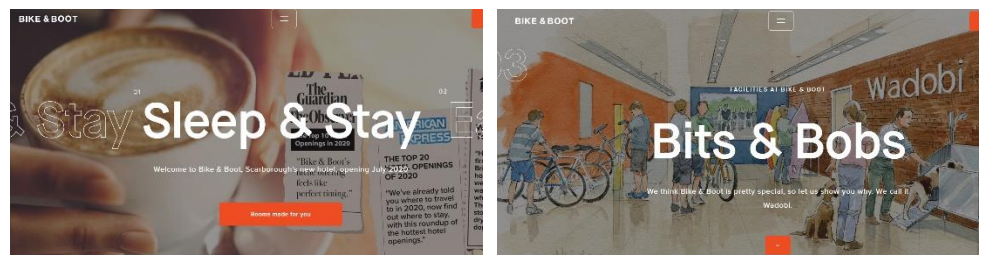
Other operators are walking and cycling operator Macs Adventure, Ramblers Holidays (the not for profit tour operator partners of the Ramblers walking campaign group) and the leading cycling-specific operator Saddle Skedaddle.

8.5.2 Examples of Products Aimed at Walkers and Cyclists

Bike and Boot, Scarborough

This boutique hotel opened in 2020. It has 65 bedrooms, with facilities catering for what it terms 'Adventurers'. They include a bar / restaurant / café and an in-house projection room. Their marketing is targeted at walkers, dog-owners, bikers and surfers. Facilities for cyclists include secure bike storage monitored by CCTV, with room card access only, a washing station, service tower, and space for up to 40 bikes. There is a washing and drying station for walkers and similar facilities for dogs.

Figure 68: Bike & Boot Inn



Dales Bike Centre, Yorkshire

This is a trail centre and road cycling hub located in the rural Yorkshire Dales. It has a bike shop, bike hire, a 14-bed bunk accommodation, bike wash, bike storage, drying room, laundry and a 24-hour cakery. They have planning permission for a £1.3m expansion project, including a new café, 8 more rooms, a larger heated bike storage area and a sauna. They have a wide range of services with a simple, clean accommodation offer.

Figure 69: Dales Bike Centre



The Grange, South Wales

A 5-bedroom boutique guesthouse located in Cefn-Coed-y-Cymmer in Wales, close to Bikepark Wales and the Brecon Beacon National Park. They have bike storage, washing & maintenance facility and a fully equipped team-car. They were featured in The Guardian's "Top 10 cycling hotels in UK, France and Spain" in June 2019.

Mallorca Cycling Hotels

Mallorca has fairly recently obtained a reputation as being outstanding for road cyclists, offering quiet roads of good quality, varied landscapes and excellent weather. Mallorcan hotels have taken advantage of this by marketing themselves as cyclist friendly. These mostly include storage, servicing and hire. In certain cases, these are chargeable, similar to any other hotel service.

Figure 70: Mallorca Cycling Hotels



Bike Hotel Caravel, Italy

This is a four star, full service hotel, in Torbole Sul Garda on Lake Garda. They specialise in cyclists (road and MTB). Their staff are trained to be highly knowledgeable about the area. It has bike hire, secure storage, a workshop, laundry service and maps / information, and bike guides speaking several

languages. It has the only official Focus²⁶ Test Centre. It offers a large breakfast with energy products. They offer outdoor activity packages with cycling as one element of the whole. Other elements included Nordic walking, guided tours to places of interest and spa entry.

Figure 71: Bike Hotel Caravel



8.5.3 Quadricycles

There may be potential on the seafront for hire of quadricycles (also called Surrey bikes). Figure 72 has examples from Montreal's Old Harbour and the main park in Rome. They are in many other locations, although rare in the UK, and always popular, especially with families. Unpowered versions cost about £2,500 to purchase (by an operator). Powered versions cost about £4,500.

Figure 72: Quadricycles in Montreal (normal) & Rome (electric powered)



8.5.4 Cycle Safety Park

This is a specific idea inspired by a facility created by Nottingham City Council in Victoria Embankment park. Similar facilities are common in other countries like Spain. They are a small road network where children can safely cycle or scooter, learning road etiquette in doing so. The Nottingham one cost £135,000 and occupies about 3,000 m². It has been very popular.

²⁶ A cycle brand

Figure 73: Cycle Safety Park, Nottingham



8.6 Destination Hotels

This can be defined as hotels which are destinations in their own right i.e. people choose to visit a place as a result of the hotel.

Some examples are set out below.

8.6.1 Hotels famous for Exceptional Standards and / or Design

The Michelin Guide has a section for hotels like this.

The Tresanton Hotel in St Mawes, Cornwall, is an example. It was a very popular seaside hotel before falling on hard times in the 1970s. It has become one of Cornwall's "hottest" spots having been purchased by Olga Polizzi, who had been responsible for the interior decoration of her brother, Rocco Forte's global brand of big-city luxury hotels. The 1940's construction is still in place. It looks unassuming from the outside, like a collection of small seaside houses scattered up the hillside. The interiors are exceptional and every room has a panoramic view of Cornwall's south coast and St. Anthony's lighthouse. It has a fine restaurant, emphasising local seafood and produce. Food is served on a terrace, which has a close-up view of the harbour.

8.6.2 Hotels in Interesting Buildings

There are many examples of hotels that are destinations because they are converted from a building that is of notable interest.

Some examples are:

- **Paradors in Spain.** This is a government-owned chain of hotels, many of which are converted from buildings of exceptional interest. They originated in an initiative to attract tourists to rural locations. They include castles, monasteries and many other types of historic building. They are always buildings of the highest quality and interest in prime locations. Some, as in Salamanca and Cadiz, are modern buildings in exceptional locations. Their restaurants feature dishes that are indigenous to the area. Many people visit Spain specially to stay in specific paradors and to tour them.

- McMenemy's in Oregon and Washington States, NW USA. This is an exceptionally imaginative company that converts historic properties. Their portfolio includes a former primary school, Depression era work farm and cinema. Their core business is brewing and all their establishments include a brew pub /restaurant. Many of the properties are also hotels. They include features like cinemas, hot tubs that are the size of small swimming pools and live music. All their properties are decorated with large reproductions of photographs of what the building was like and people associated with it. It is not a luxury product. Many people go to the NW to tour McMenemy's hotels.

8.6.3 Foodie Hotels

People frequently choose specific hotels because the food is exceptionally good.

The Good Hotel Guide lists hotels which it rates as top for foodies.

The George in Stamford, Lincolnshire, is its top recommendation. It is a historic coaching inn that has been owned for 50 years by Lawrence Hoskins. It offers cream teas by the fire or in the courtyard, a Champagne Bar, formal dining in the Oak Room, and more informal dining in the Garden Room, which also has a plant-based menu.

8.6.4 Wellness Orientated Hotels

Mintel's Report "The Wellness Traveller" reports that over two in three UK travellers show interest in taking a holiday specifically to improve their health/wellness. 69% of consumers would be interested in taking a holiday specifically to improve their health/wellness. 79% are interested in adding a wellness activity to their regular holiday. Activities they showed interest in are:

- Beauty spa treatment 51%
- Physical fitness activity exc yoga /pilates 39%
- Meditation 37%
- Skill building 33%
- Yoga / pilates 30%
- Alternative treatment 27%
- Specific diet activity 25%
- Attending a health / wellness festival 23%

Wellness-related activities are a prime reason why people will specifically want to go to a hotel, wherever it is located.

Figure 74 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 75 has a categorisation of types of spas.

Figure 74: 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 75: 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:

- Armathwaite 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.

Mintel highlights the luxury spa and wellness hotel, Fairmont Windsor Park, which opened in Jan 2022. It offers a range of activities to improve physical and mental wellbeing including indoor and outdoor gym and group class studios for activities like hatha yoga, meditation, Pilates, cycling and boxing.

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. It may be an opportunity on Jersey.

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. 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.

8.7 Events to Drive Visitation in the Shoulder Seasons

The key challenge for rural destinations in staging off-season events is how to make them sustainable.

Events in Cornwall that are in the shoulder season or winter include:

- The World Cornish Pasty Championships at the Eden Project, on St Pinan's Day (St Pinan is the patron saint of tin miners). It is part of a wider programme of events.
- A major exhibition about the life of the sculptor, Barbara Hepworth, at Tate St Ives, starting in November.
- Porthleven Food Festival, 22-24 April.
- Newquay Beer Festival, 23rd – 25th September.

Main events in Bath in the Autumn are:

- Jane Austen Festival. Will take place from 9th - 18th September 2022. A feature is the Grand Regency Costumed Promenade, walk alongside 500 costumed Jane Austen fans. Other activities include guided walks and day trips, talks, music recitals and concerts, workshops and dance classes.
- Bathscape Walking Festival. Will take place 10-25 September 2022. It offers many free guided walks led by local experts.
- The Bath Children's Literature Festival. Will take place from 23 September to 2 October. It is organised by Bath Festivals, a charity. They also organise the main Bath Festival, which takes place during the summer and features international standard musicians, speakers and writers in a variety of venues around the city.

9 Conclusions

9.1 Access

The methods by which people can get to Jersey will, obviously, determine where tourists will come from.

The number and range of flights serving most places was impacted by the pandemic. Jersey fared much better than most airports in Europe and has recovered faster. Ports of Jersey has confirmed that services are roughly 80% of pre-pandemic levels.

Jersey has, as in 2017, good air services and reasonable ferry services to the UK, but poor connections elsewhere (other than Guernsey), although there are charter flights to many European destinations in the summer.

Many tourism stakeholders are likely to take the view that route development is the most important priority for product development (with the likely exception of dealing with the extreme staff shortages). The Chief Executive of Ports of Jersey told us that he regards developing connections into Europe as a significant opportunity.

It is, obviously, not easy to achieve this and would require appropriate marketing capability in place within Jersey to help stimulate inbound tourism from these destinations.

The UK will be the primary market for inbound connectivity for the foreseeable future and Jersey will be competing for connectivity with places in the UK, as well as across Europe.

Research on the profile of visitors to Cornwall shows that:

- Young families and empty nesters are the main markets.
- It is dominated by those who are “cosmopolitan” in disposition.
- Many people take a mix of short breaks and longer holidays. Average length of stay has been in long term decline, although likely to reach a floor²⁷.

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.

9.2 Serviced Accommodation

The data shows that the island has a strong hotel offer in terms of the quality on offer by comparison to places like South Lakeland and Cornwall although, as with them, a section of the stock is tired and in need of refreshment.

²⁷ Average length of stay of visits to Jersey has been higher in 2022 so far than in 2019.

It has been reducing in size at a substantial pace, mainly as a result of properties being converted to apartments. That seems likely to continue, especially in St Helier.

There is perhaps more consistency in the quality of the offer than there was in the past because of the loss of accommodation at the low end of the market.

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 (and private beaches) that most resorts in warmer climates feature.

A larger proportion of hotels have spas than Cornwall and the Lake District.

There is a big difference in the nature of the hotel offer in places like Bath with places like Jersey, Cornwall and South Lakeland. Hotel stock in Bath is largely in branded properties, with a diverse range of brands on offer there. The hotel stock in the other places is largely independents, with the branded sector largely confined to budget brands (largely Premier Inn and Travelodge). The reason for the difference is that cities offer a better balance between business and leisure tourism than rural areas. This is more attractive to brands.

Research by Mintel found that nearly half (46%) of UK adults stayed in a hotel chain in 3 years to Sep 2021. 25% stayed in an independent hotel.

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, 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 an upmarket branded hotel at Fort Regent. Current plans envisage a new build hotel, but another possibility might be a hotel similar to Spanish paradors²⁸. 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.

²⁸ 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.

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.

It seems likely that the refurbished Millbrook House Hotel will be a destination hotel with a different character to any other on the island.

9.3 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 Cornwall, South Lakeland and, almost certainly, most destinations on the continent. Its tourism offer is fundamentally different as a result.

Properties listed on Airbnb have about 10% of the rooms of the hotel sector in Jersey. Properties listed on Airbnb have, by contrast, seven times as many rooms as the Cornwall hotel sector has. Rooms on offer on Airbnb in South Lakeland is about the same as the number of hotel rooms on offer.

Both Cornwall and South Lakeland have much other self-catering that is not promoted on Airbnb.

This represents a stark difference.

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 / chalets. 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 upmarket versions of these holiday centres, of which Les Ormes resort is an example.

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 Castle²⁹.

²⁹ Where there is already a small amount of self-catering.

9.4 Wellness

Recent survey research by Mintel reports a big increase in interest in wellness activities in recent years. 31% of potential overseas travellers are keen to book a wellness activity to take part in while on holiday, up from 18% in 2018.

The spa offer in Jersey Hotels is excellent compared to other parts of the UK and, probably, comparable to top continental destinations³⁰. However, it is recognised that there is not a destination spa hotel as such, comparable with the likes of Soho Farmhouse or the Gleneagles Hotel.

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 and cold water swimming for example. A strategy of this nature could have the advantage of wrapping up a wide variety of initiatives and of being of as much benefit to locals as tourists.

Development of a high quality thalassotherapy³¹ 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.

9.5 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, Jersey War Tunnels and Mont Orgueil Castle.

³⁰ Although there are reports of difficulty of booking treatments because of lack of staff.

³¹ Therapy based on sea water.

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, an 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.

Most successful destinations that feature visual arts rely on a collection of quality. There is one known collection on the island that is unquestionably of high quality – that of the surrealist artist, Claud Cahun. Her story is fascinating and her house, with a stunning location overlooking St Brelade's Bay, is currently on the market. This is the most obvious opportunity to create a cultural facility capable of attracting visits from abroad. It would be expensive and also be subject to whether the original artwork can be loaned again, which may not be possible due to light-exposure damage caused when the artwork has been exhibited in the past. However, it is the kind of project that could appeal to high net worth individuals and corporate donors.

Fort Regent is the other most obvious site for a major attraction development in the medium term. Plans have shown an external elevator from Snow Hill to improve access from the town centre. That approach is fairly common in historic hill towns on the continent³² 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. It is difficult to come up with a viable scheme for such a big site and the issues are too complex 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 parador³³-style hotel, including perhaps a self-catering dimension.

³² Coimbra in Portugal, Hondarribia in Spain, for example.

³³ 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.

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.

9.6 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 or ongoing running costs. It is also not clear currently whether the market for conferences and other events is in decline because of the move to online meetings.

9.7 Events

Many events take place on the island annually, including Jersey's distinctive version of Siena's Palio, the Battle of Flowers, the International Air Display, several music festivals and sports events such as marathons.

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, timed with when the first are produced for market, seems to be an obvious opportunity. Farmers are at their busiest then, but a festival would not necessarily require much input from them.

A festival that focuses on all of the "Big Four"³⁴ foods which the island has notable strength in could be another possibility.

It would be sensible in strategic terms to invest in one or more events that can attract visits to the islands in the shoulder periods. A themed festival that is located entirely or predominantly in St Helier, using interior and exterior spaces, could be best in doing this.

³⁴ Potatoes, Dairy, Lobsters, Oysters.

While events can be seen as an easy panacea, the reality is that they are highly resource intensive and frequently cost more to put on than the return they generate, especially in circumstances like Jersey's, where there is only a small resident population to sustain them.

9.8 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 in 2017 commented on the potential for Jersey to attract more teams and individuals for pre-season training, and that seems to have been achieved with the opening of Strive.

9.9 Retail

The retail offer is moderate.

The offer in St Helier is like that of a UK town, but with extra character, largely as a result of the independent department stores and a greater proportion of independent shops rather than brands.

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

It may be advantageous, from a tourism perspective, if more 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.

9.10 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 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 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.

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.

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.

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. Some eateries have opened in the market. The markets are, however, 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.

The town is also lacking a section for designer brands of the ilk seen on Bond Street³⁵. 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.

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.

9.11 Development Funding

Many projects that can improve the tourism offer are not commercially viable. The Tourism Development Fund played a key role in financing projects that otherwise could not have taken place. There would ideally continue to be such a fund, perhaps in a more flexible form.

There might be a case for introducing a scheme similar to the Heritage Lottery Fund's Heritage Enterprise programme in Britain. That provides grants to

³⁵ Not, obviously, on the scale of Bond Street.

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.

9.12 Making Experiences Bookable

Mintel reports that people are far more likely now to plan activities in advance and want to be able to book them online.

This includes restaurants, exhibition entry, bikes, guided walks etc. It is sensible to facilitate this.

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