

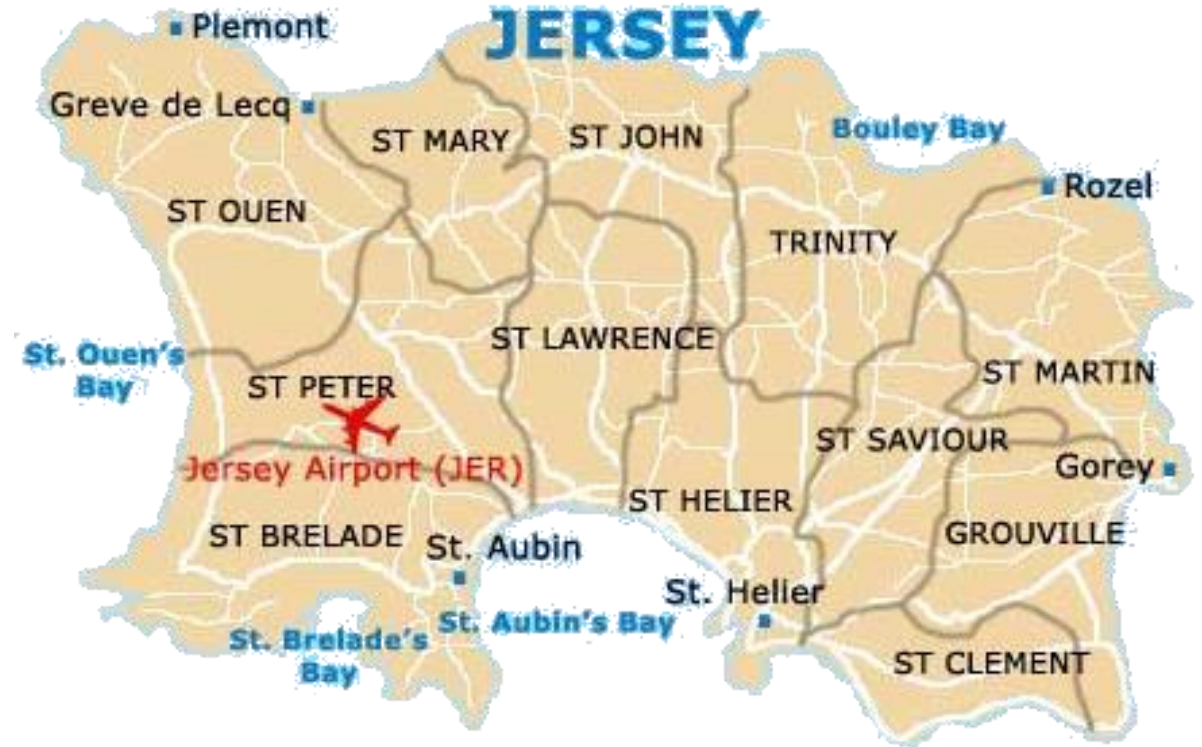
Improving the Visitor Experience

A scenic coastal landscape featuring clear turquoise water in the foreground, rocky shores, and a steep green cliff on the right. The sky is blue with scattered white clouds. The overall scene is bright and inviting, suggesting a high-quality visitor experience.

KANTAR TNS.

Contents

- 1 Introduction
- 2 The Jersey Experience
- 3 Jersey – the competitive context
- 4 Disabilities and impairment

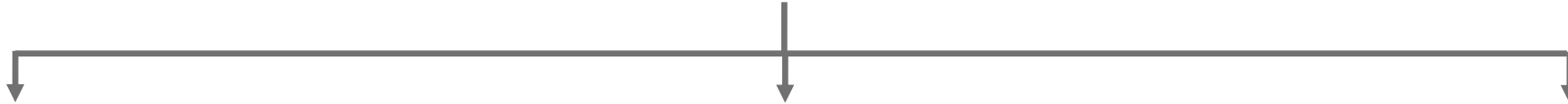


1 Introduction



Aim of the research programme

How should Visit Jersey develop the island's tourism infrastructure to deliver best in class experiences?



1 Which elements of the tourism offer should be addressed to provide Jersey with an advantage over its key competitors?

- How is Jersey currently perceived by visitors at the different touchpoints?
- How do they feel about it as a destination?
- How do visitors' experiences in Jersey compare to other destinations in the British Isles?
- Do these experiences differ by visitor segments?
- How can Jersey gain competitive advantage and become more attractive as a destination?

2 How can Jersey deliver an enriching and memorable experience?

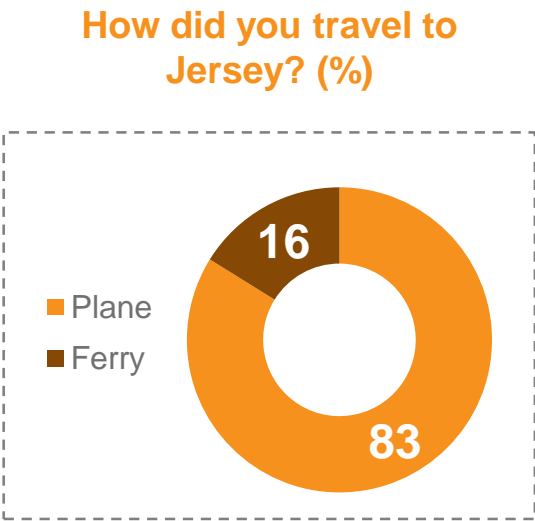
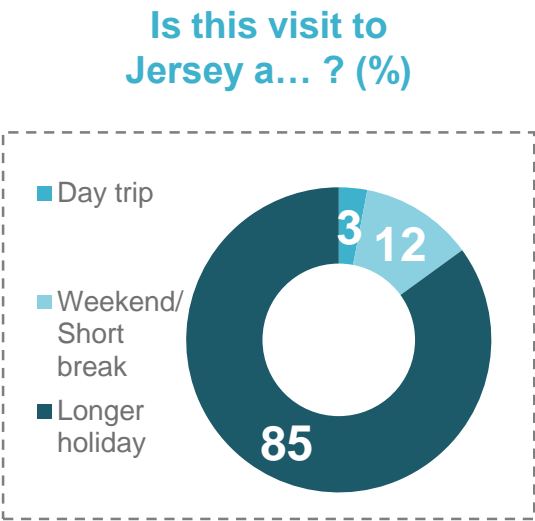
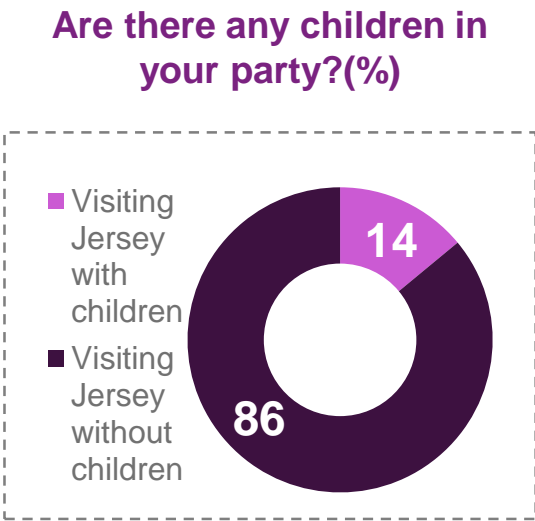
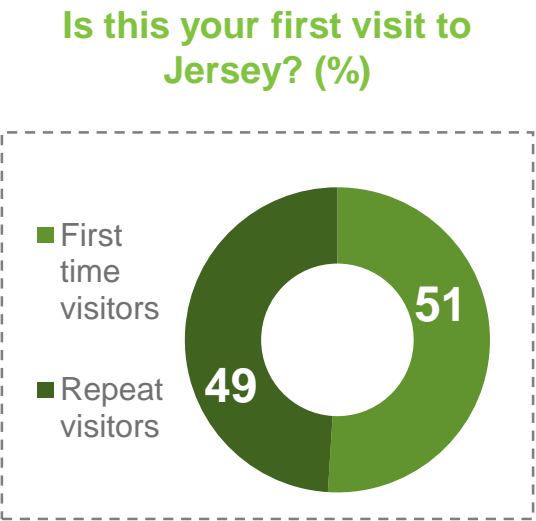
- What matters most to visitors when choosing a destination?
- Does Jersey meet visitor expectations?
- Are the experiences memorable or unique to Jersey?
- What triggers positive and negative emotions amongst visitors?
- How does this differ amongst the range of visitor segments?
- Which elements of the offer have the potential to convert visitors into advocates?

3 How can Jersey maximise loyalty among its current visitor base and encourage positive recommendations to deliver growth?

- Does Jersey's tourism offer reflect current customers' needs?
- How does it compare to other popular destinations amongst the target visitor segments?
- Which key needs are not currently being addressed?
- How can the existing offer be modified to attract new visitors?
- What are the quick wins versus medium to long term investments required to maintain and drive future visitor numbers?

Who we spoke to, where and when.....

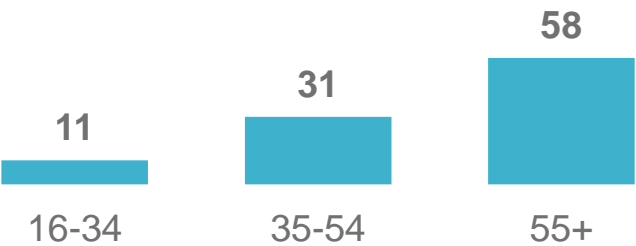
Fieldwork dates	Interviews by month:	Interview locations		
20 th February 2017 – 30 th September 2017	Feb/March 23	Airport	St Brelades Bay	St Helier
	Apr 106	Durrell Wildlife Park	St Ouens Bay	- Bus Terminus
	May 232	Elizabeth Castle		- Liberation Square
	Jun 306	Gorey		- Marina
	Jul 303	Jersey War Tunnels		- Maritime Museum
	Aug 444	Mont Orgueil Castle		- Tourist Information Centre
	Sep 407	St Aubins Harbour		- Waterfront



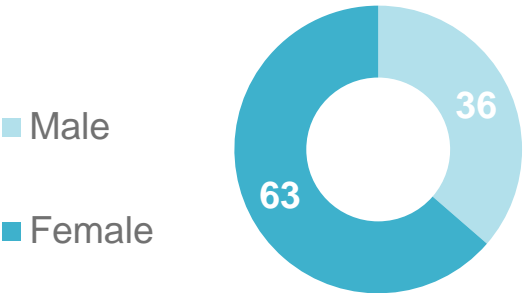
Profile of first time visitors (%)

First
timers

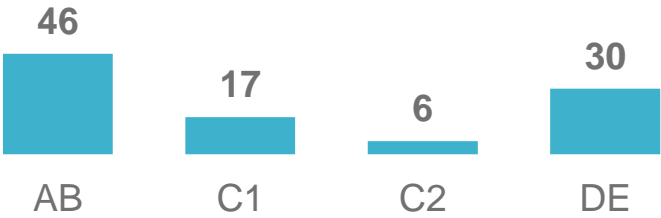
Age



Gender

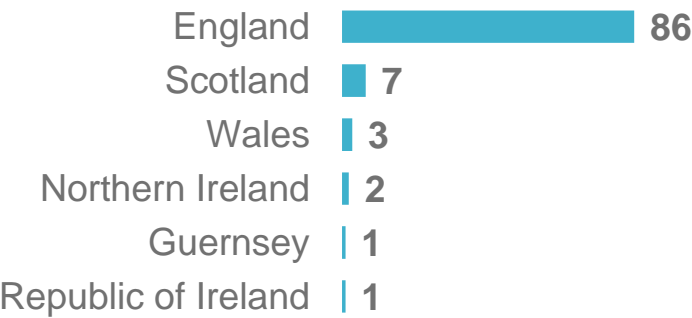


SEG

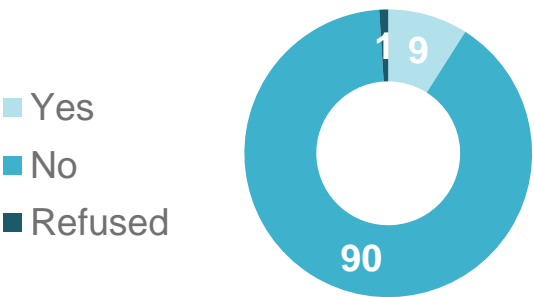


Refused: 3
Don't know: 4

Country



Disability



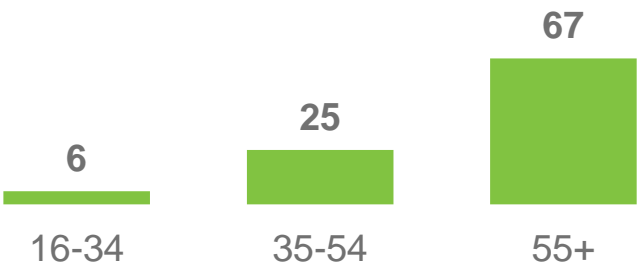
Children in party travelling to Jersey



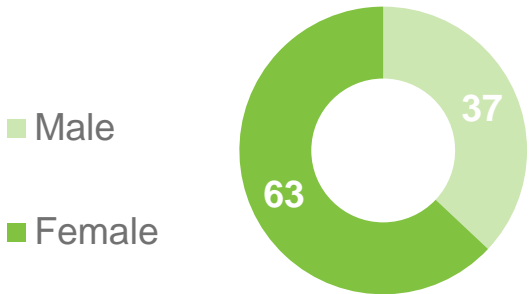
Profile of repeat visitors (%)

Repeat visitors

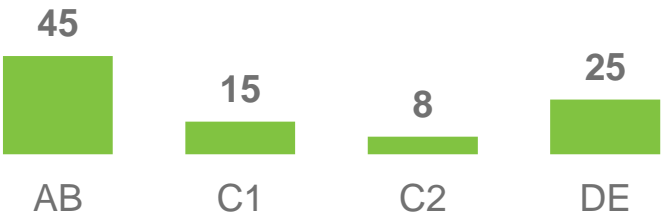
Age



Gender

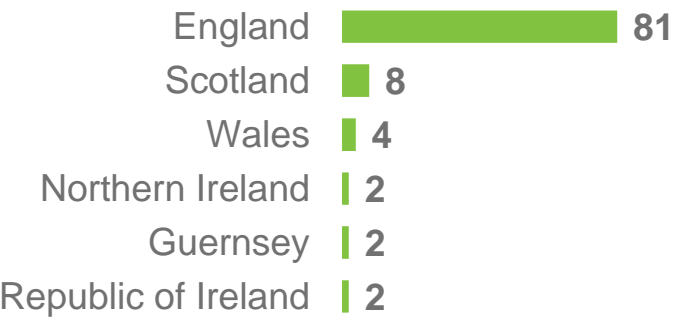


SEG

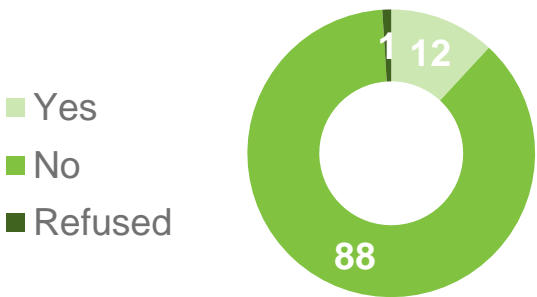


Refused: 2
Don't know: 3

Country



Disability



Children in party travelling to Jersey



What we're going to tell you.....

Insights

Jersey has a strong relationship with visitors and this is reflected in its strong performance score

Preference for Jersey could be a little higher and this is key to sustaining a competitive advantage

Although key subgroups had varying strengths of relationships with Jersey, there was a fairly consistent pattern in their ratings for each of the key drivers

The main variation was that weekend and short break visitors felt that Jersey did not perform as well on overall value for money and shopping as Wales and Kent/ Sussex respectively.

Things to see and do, accommodation and tourist information were the factors most important to visitors. The ranking varied slightly between subgroups but these three drivers consistently appeared in the top 4.

One key area of weakness for Jersey is evening activities

Recommendations

Focus on driving up preference of Jersey as this will maintain a strong relationship score, especially if performance deteriorates

The evening activities offer needs consideration. Although not an important driver, it falls behind competitors on performance so should be improved to increase the overall appeal of Jersey

Pay attention to the attributes within drivers that are not performing well. For example, transport in Jersey was well-received but prevalence and clarity of pedestrian signage was a constant pain-point (Action Prioritisation table)

Weekend/ short break visitors were not as positive about overall value for money and shopping as everybody else, so work could be done in these two areas to be more favourable towards these types of visitors

More could be done to increase the appeal of Jersey's beaches and countryside. Visitors already rank these higher than the rest of the UK and Ireland, so these features could be dialled up to attract more attention

2

The Jersey Experience



In this section...

How strong is the relationship between Jersey and its visitors with regards to performance and preference?

Which factors of the Jersey experience are most important to visitors?

How does Jersey as a tourist destination perform on these important factors?

What are the strengths and weaknesses of the key attributes of the Jersey visitor experience?

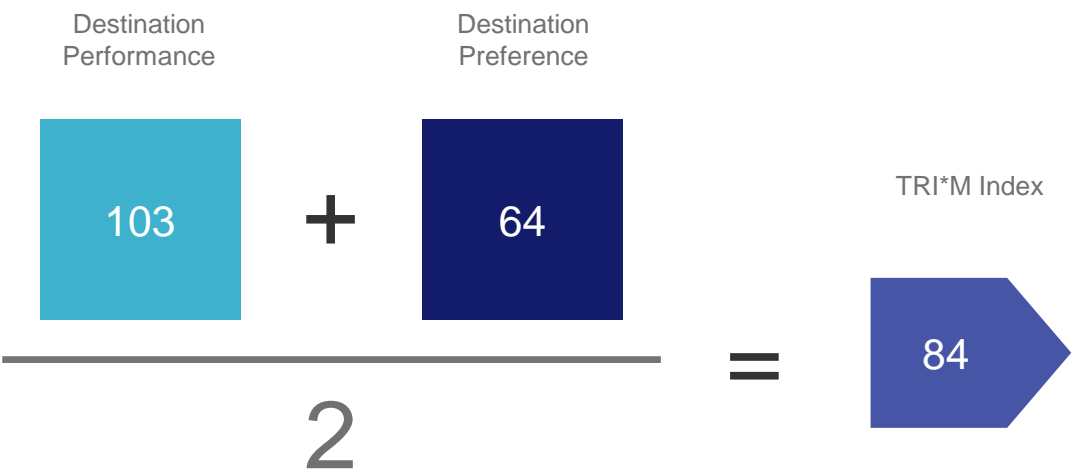
What do people think of the overall value for money of Jersey as a tourist destination?

What are the key memories that visitors have of Jersey?

Performance and preference define the strength of your visitor relationship.

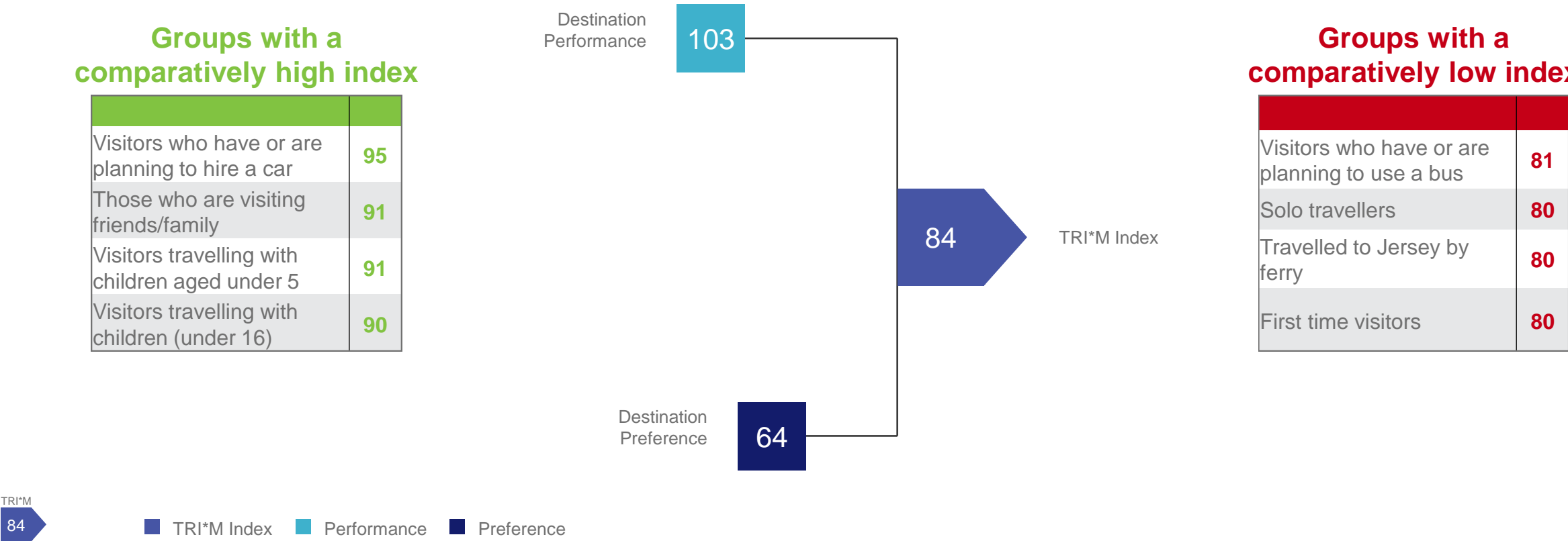
Introducing the TRI*M Index

Calculating the TRI*M Index



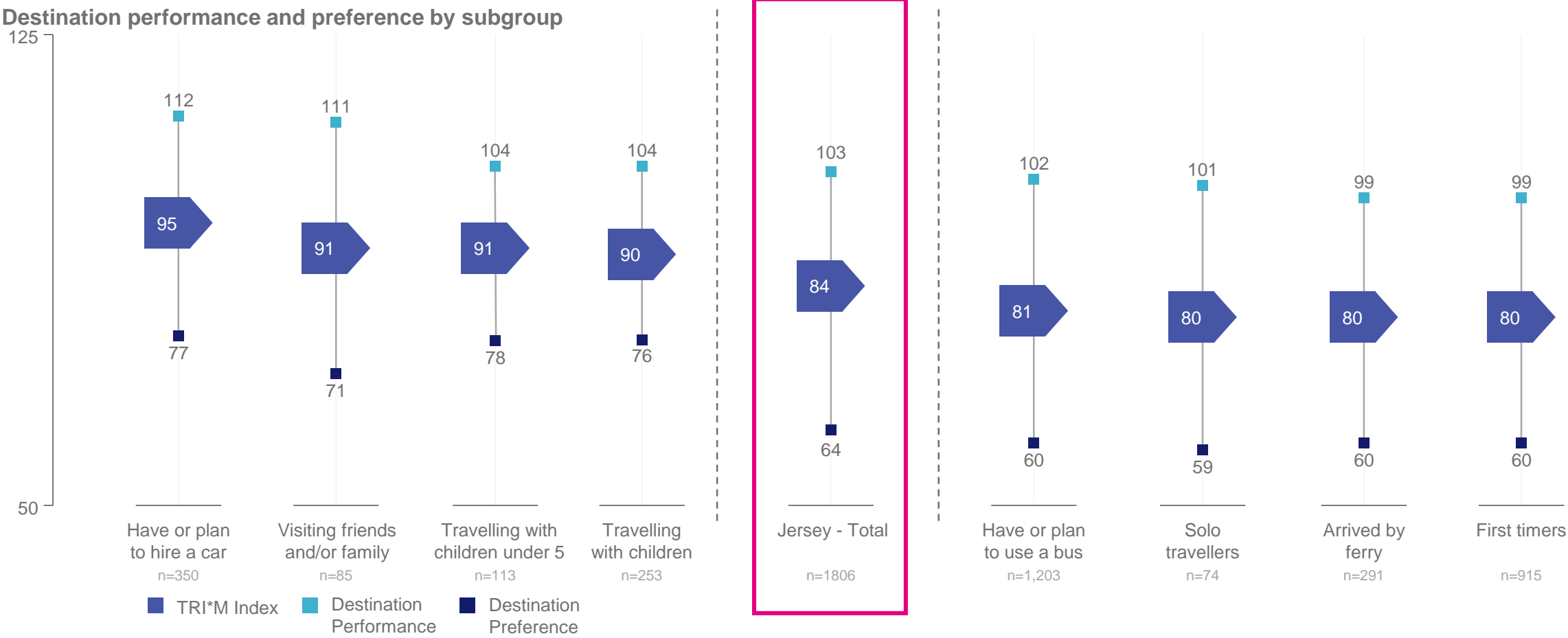
Visitors with children tended to rate Jersey highly and posted a higher index score than couples without children and solo travellers. Visitors hiring a car were among the most positive overall.

Visitor Relationship Index – Jersey

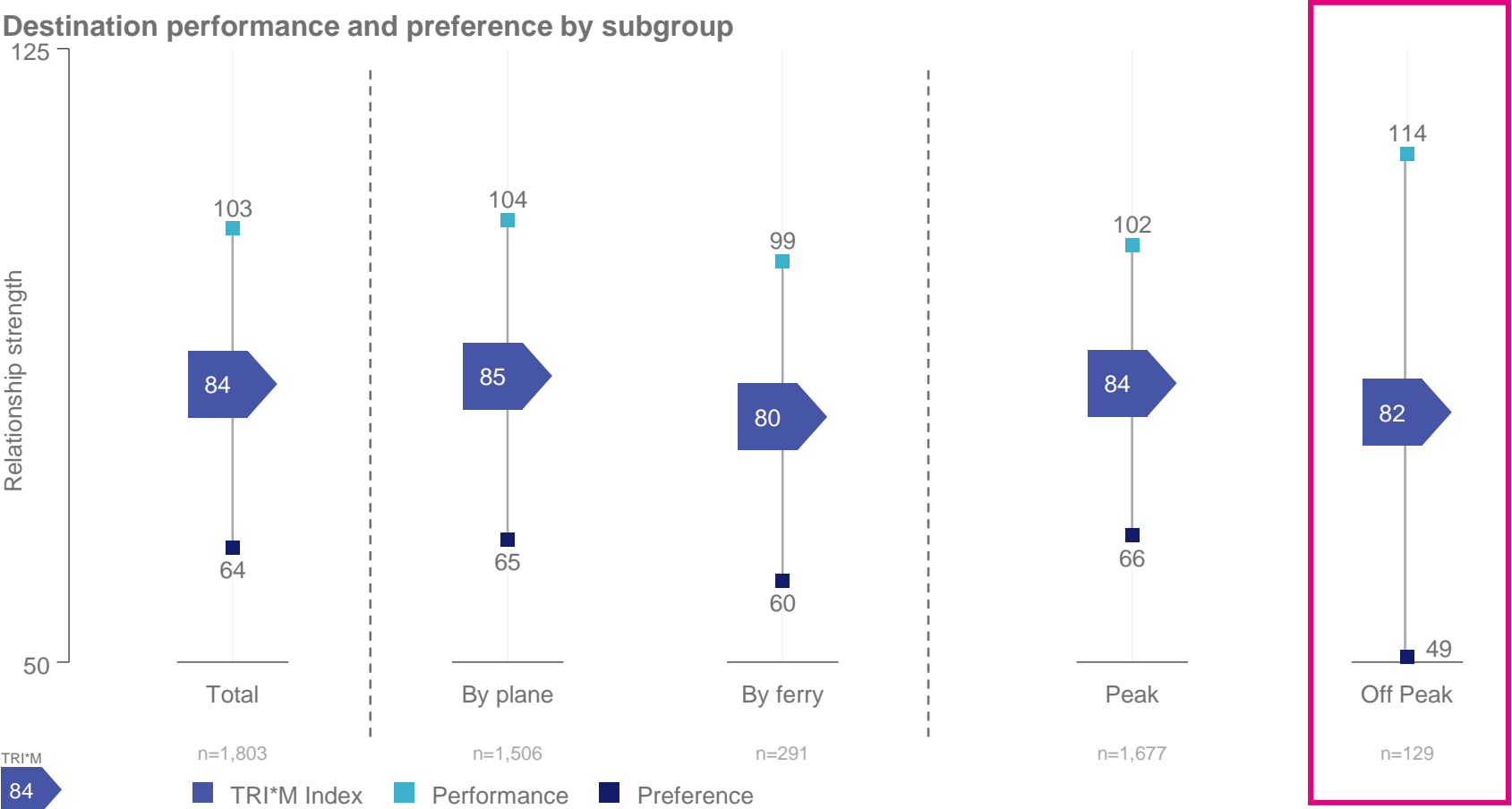


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A key target for Jersey must be to reduce the gap between Performance (relatively highly rated by all visitors) and the extent to which Jersey is a preferred destination; the most successful brands and destinations exhibit high levels of Preference.

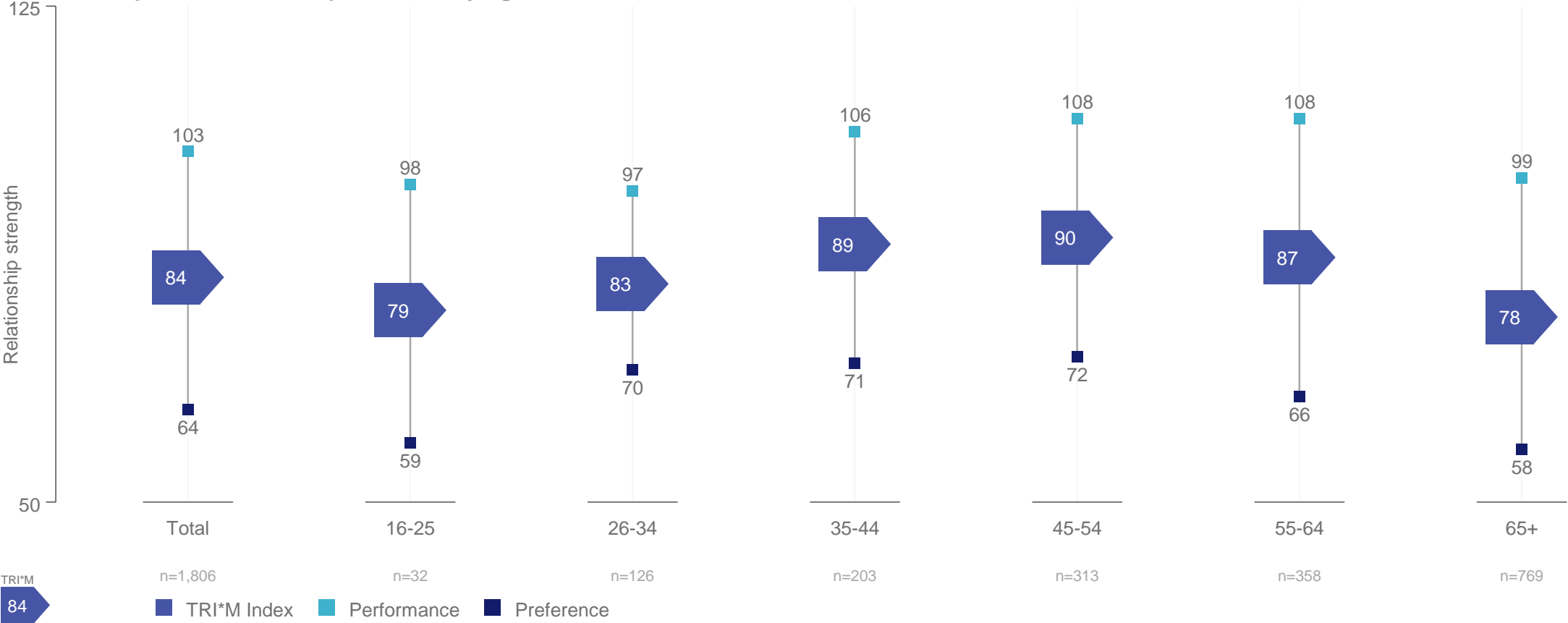


There is some variation between visitors in the off-peak months compared to those in the peak summer months. The large performance-preference gap amongst off-peak visitors suggests that, whilst they rate Jersey very highly, there is no clear preference over other destinations



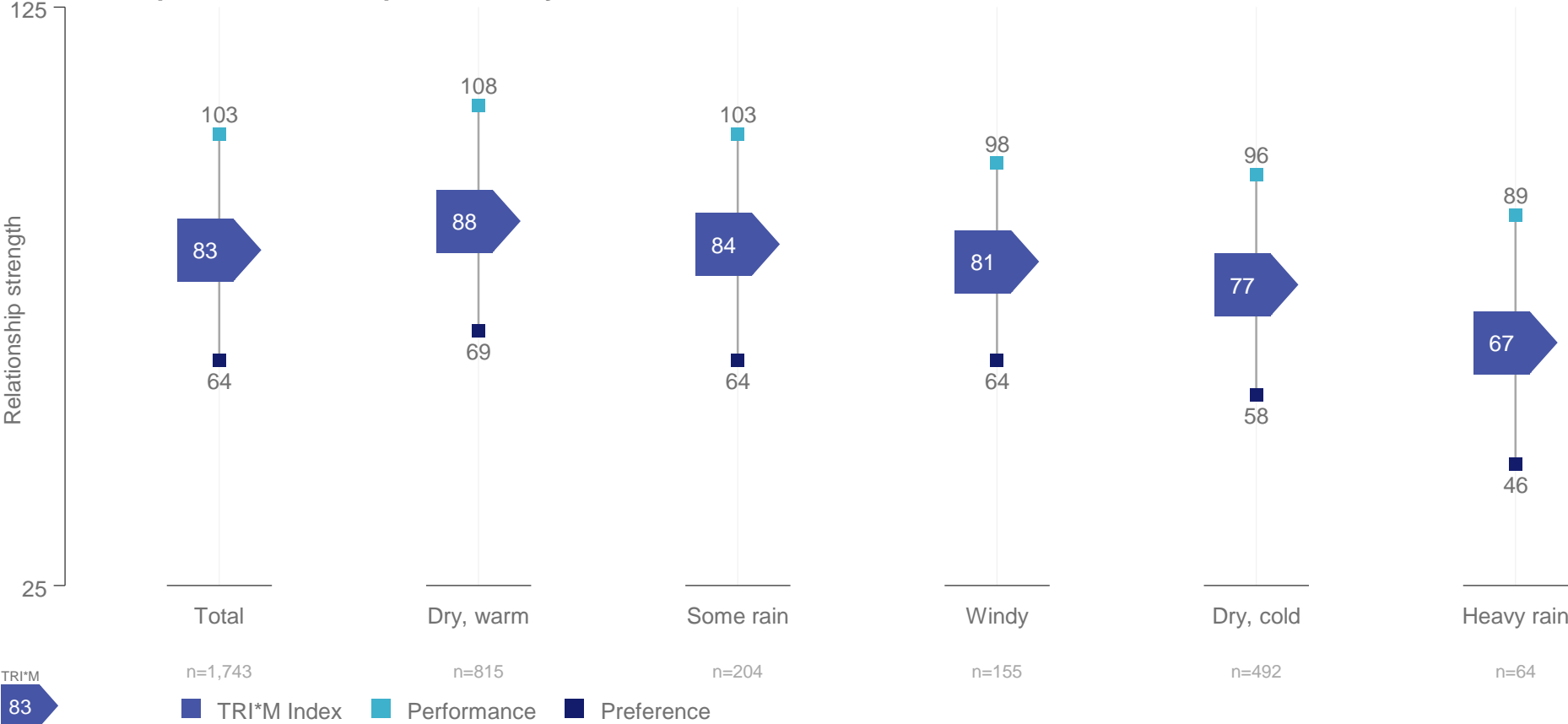
The youngest and, somewhat surprisingly, the oldest age groups seem to be the least engaged with Jersey as a destination, primarily because of the lower Preference scores. The 35-54 age group have the strongest relationship with Jersey, a promising opportunity as the basis for future visits

Destination performance and preference by age

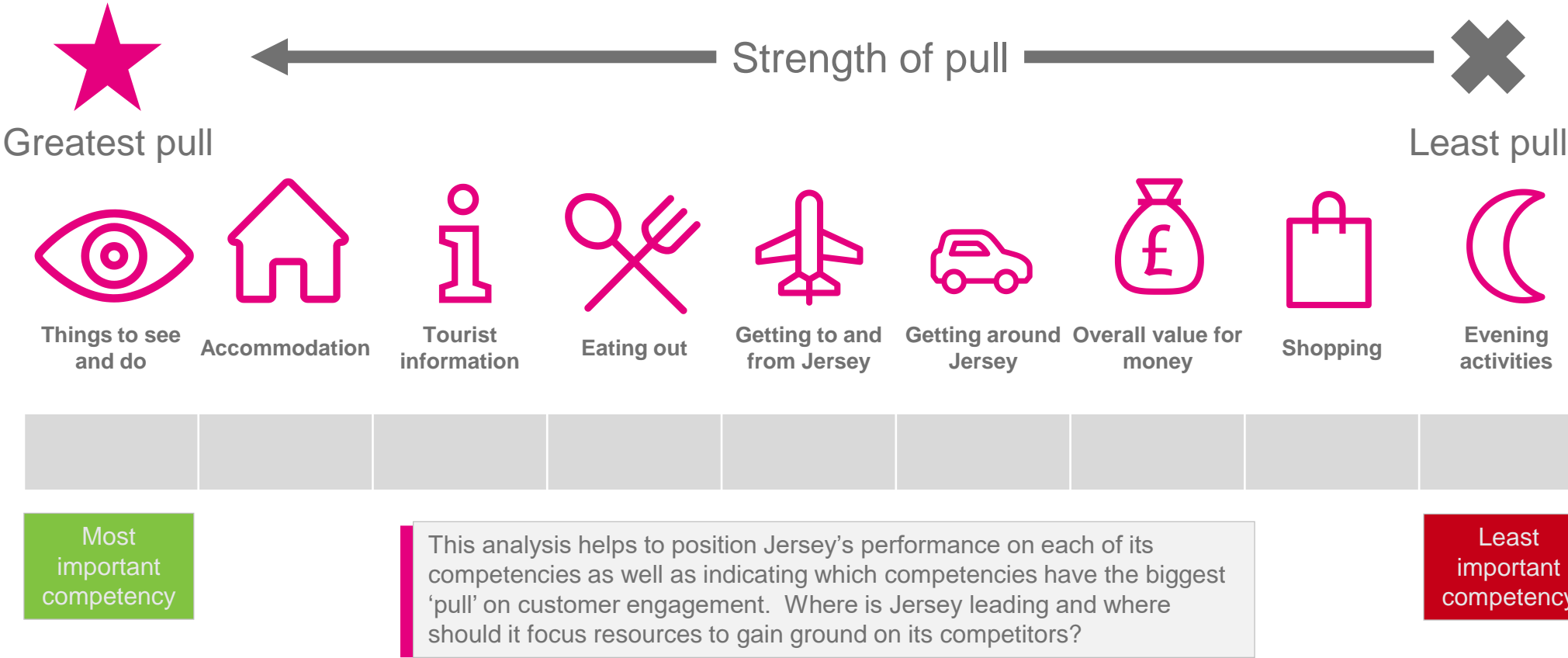


Not surprisingly, the weather had an influence on the strength of visitors' relationship with Jersey as a destination. Poorer weather resulted in lower index scores, especially in relation to Preference

Destination performance and preference by weather conditions

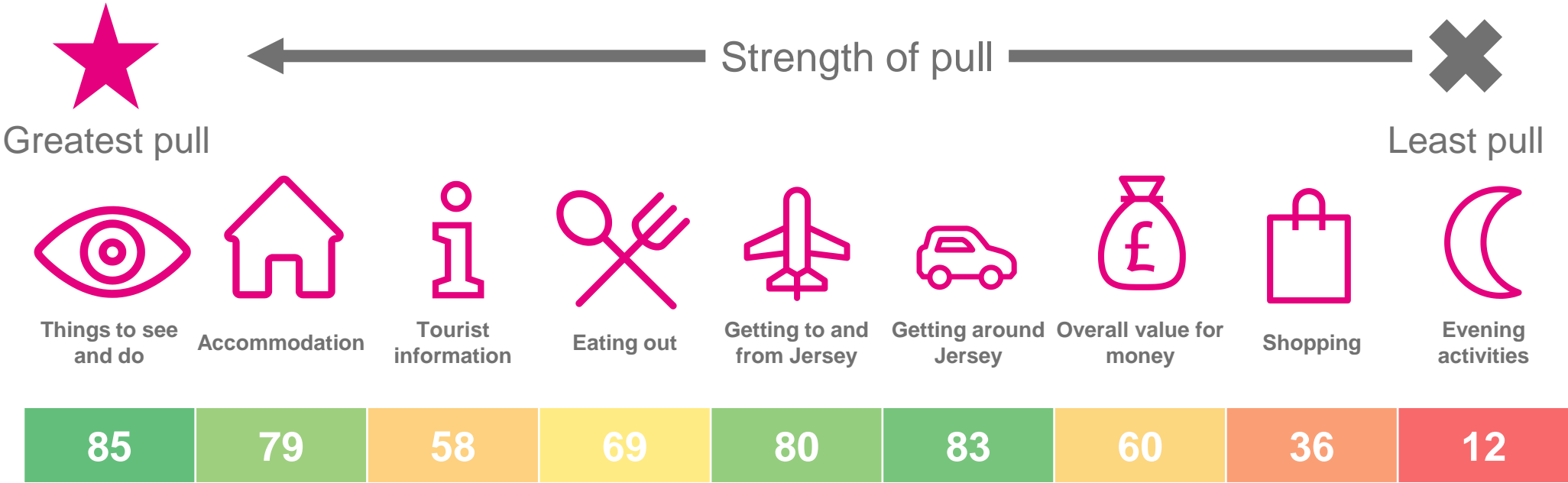


We asked which visitor destinations deliver an ‘excellent’ performance on nine elements that define a visit. Then we correlate the responses with the TRI*M Indices to determine the relative importance of each driver in terms of its strength of pull on the customer and Jersey’s performance in each case. The optimal customer experience is defined by excellence in areas which really matter to customers.



Jersey performs well on factors most important to visitors, but there is scope to improve tourist information. This should be an area of focus because its rating is not as high as other important drivers.

Strong performance on high level drivers (%)



Although most drivers gained similar scores amongst subgroups, there were some major differences – particularly amongst weekend and short break visitors.

Strong performance on high level drivers (%)



Things to see and do	85
Weekend/Short break visitors	77



Tourist information	58
Visitors with children	41



Getting around in Jersey	83
Weekend/Short break visitors	77



Overall value for money	60
Weekend/Short break visitors	52

Jersey's performance was measured across 44 attributes – primarily sub-categories of the headline preference drivers already described. The analysis which follows models the impact of each attribute on the overall relationship strength if the performance of that attribute was to improve or deteriorate.

Accommodation <ul style="list-style-type: none"> Quality of accommodation Range of accommodation available Helpfulness and friendliness of staff Value for money Family-friendliness 	Transport to/from Jersey <ul style="list-style-type: none"> Choice of transportation Availability of flights/ferry crossings on my preferred travel dates Cost of flights/ferry crossings Frequency of flights/ferry crossings 	Transport getting around Jersey <ul style="list-style-type: none"> Variety of transportation Availability of hire car services Availability of car parking Cost of car parking Frequency of public transport services Taxi services Cost of public transport Prevalence and clarity of road signage Prevalence and clarity of pedestrian signage 	Eating Out <ul style="list-style-type: none"> Range of cafes and restaurants Quality of food Level of service Value for money/cost of eating out Child/family-friendliness Availability of locally produced/sourced foods
Things to See and Do <ul style="list-style-type: none"> Range of things to see and do Quality of experience provided Helpfulness and friendliness of staff Value for money/cost of things 	Shopping <ul style="list-style-type: none"> Range of shops available Quality of merchandise available in the shops Opening hours of the shops Helpfulness and friendliness of staff Value for money/cost of merchandise Availability of local products 	Tourist Information <ul style="list-style-type: none"> Ease of obtaining information Ease of understanding information Quality of information provided Availability/accessibility of information via online sources/apps Ease of finding tourist information centre 	Evening Activities <ul style="list-style-type: none"> Range of things to see and do in the evenings/night Availability of family-friendly evening activities Feeling safe whilst experiencing the evening activities Value for money/cost Quality of evening activities

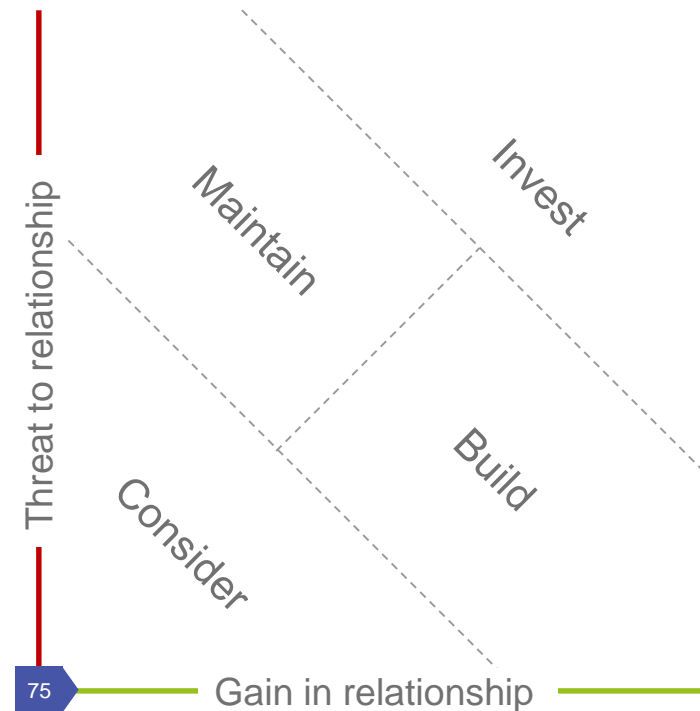
The action planning matrix identifies how to plan and where to focus action by plotting each of these 44 attributes. It illustrates how the performance on each attribute within the key drivers contributes to the overall relationship strength.

3 **Maintain** – Reduced performance could have a negative effect on the relationship

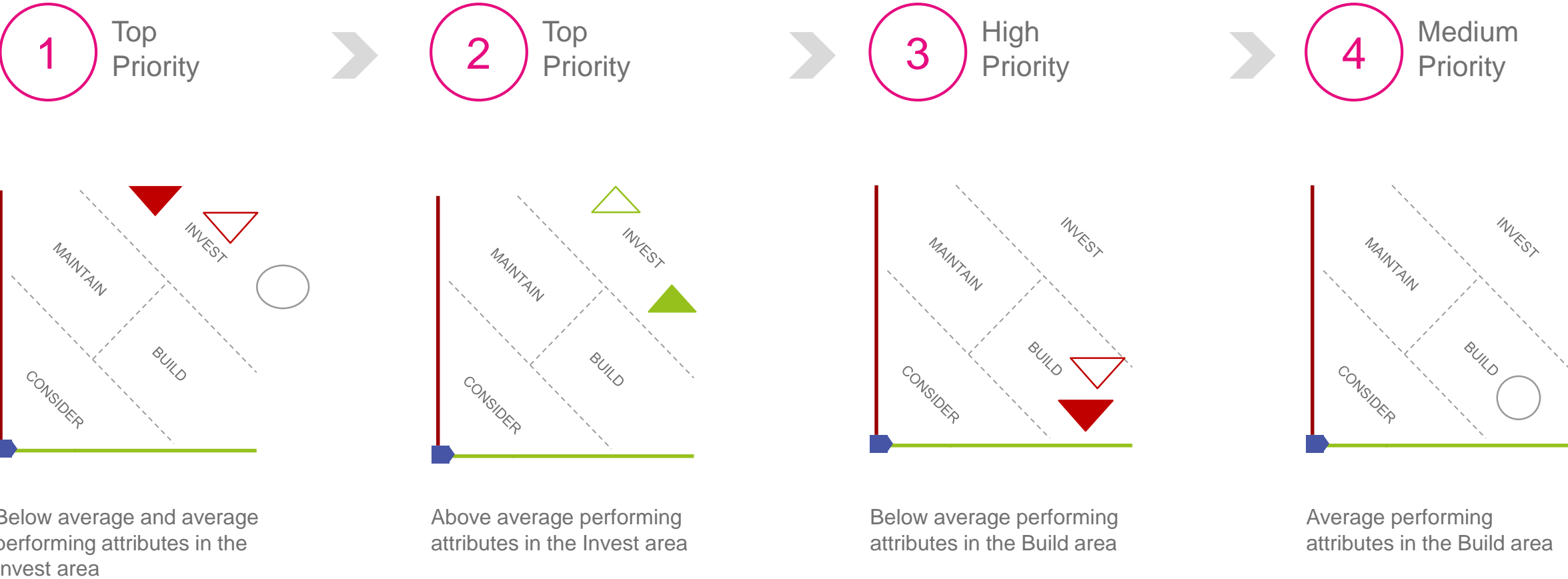
4 **Consider** – No strong impact on the overall customer relationship

1 **Invest** – Improvements in this area are most critical

2 **Build** – This area includes aspects which have the potential to increase relationship strength



The impact grids for each element of the visit help prioritise actions that need to be taken to improve levels of engagement with its visitors





Visitors are positive towards the range of activities in Jersey and further investment would deliver real benefit.

Things to see and do

- △ E01 Range of things to see and do
- △ E02 Quality of experience provided at attractions and/or when taking part in activities
- △ E03 Helpfulness and friendliness of staff when visiting attractions and/or taking part in activities
- ▽ E04 Value for money/cost of things to see and do



Enjoyed my experience thus far. Fascinated by all the history and historical sites around the island hope to see and learn more.

Bit expensive.

Beautiful tranquil cultural island.

Things are a bit hit and miss. Some things we feel are a bit pricey, but others offer good value for money, such as Jersey Zoo.

Good variety for all interests.



No.1 in Strength of Pull

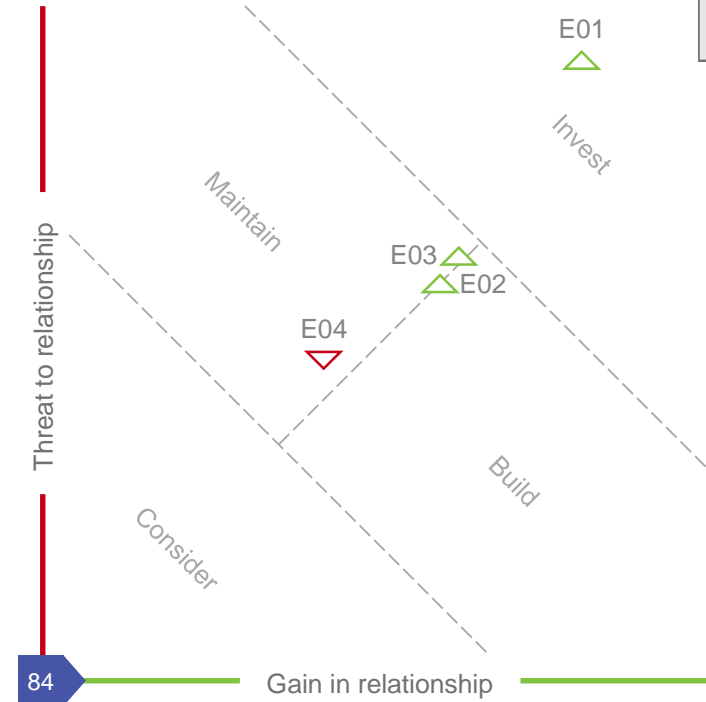
Things to See and Do

Range of things to see and do

Quality of experience provided

Helpfulness and friendliness of staff

Value for money/cost of things



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Far below average



Below average



Average



Above average



Far above average



Range and value for money of accommodation are the two aspects posting an average performance (compared with other attributes) and improvements in these areas would result in a gain in the relationship with visitors.

Accommodation

- A01 Quality of accommodation
- A02 Range of accommodation available
- A03 Helpfulness and friendliness of staff at accommodation
- A04 Value for money of accommodation
- A05 Family-friendliness of the accommodation



Good location. Nice room. Great staff.

Good but expensive.

A bit dated but clean and comfortable.

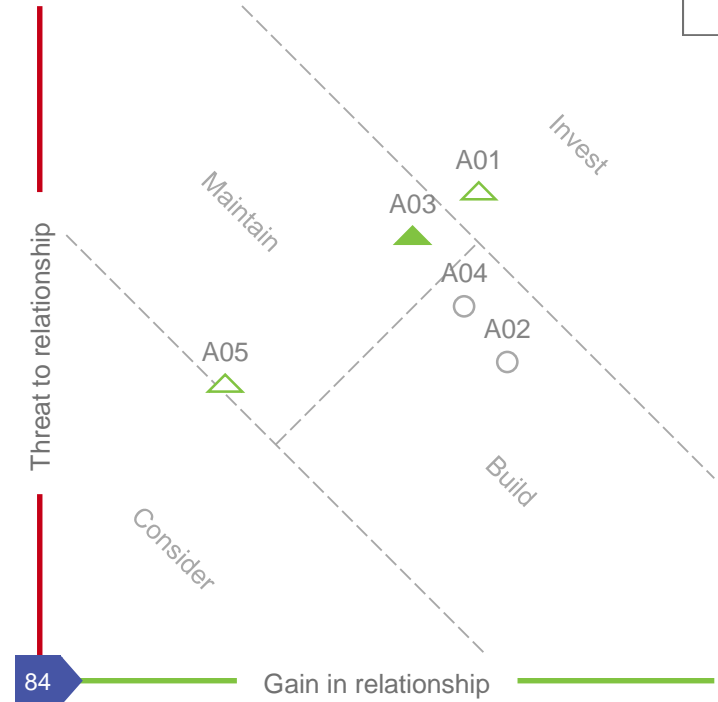
Relaxing and friendly atmosphere.

Noisy rooms which was unexpected, tiny car park.



No.2 in Strength of Pull

ACCOMMODATION
Quality of accommodation
Range of accommodation available
Helpfulness and friendliness of staff
Value for money
Family-friendliness



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▼ Far below average ▼ Below average ○ Average ▲ Above average ▲ Far above average



Visitors' experience of tourist information could be further improved by making it easier to find the Tourist Information Centre. All other aspects perform well and these levels should be maintained.

Tourist information

- △ G01 Ease of obtaining information
- △ G02 Ease of understanding information
- ▲ G03 Quality of information provided
- △ G04 Availability/accessibility of information via online sources/apps
- ▽ G05 Ease of finding Tourist Information Centre



The tourist information was very good and the bus drivers had a good knowledge of the island.

Loads of excellent information.

Problem finding new tourist information office as had moved.

Could not find tourist information centre.

Hotel had lots of brochures and information.



No.3 in Strength of Pull

Tourist Information

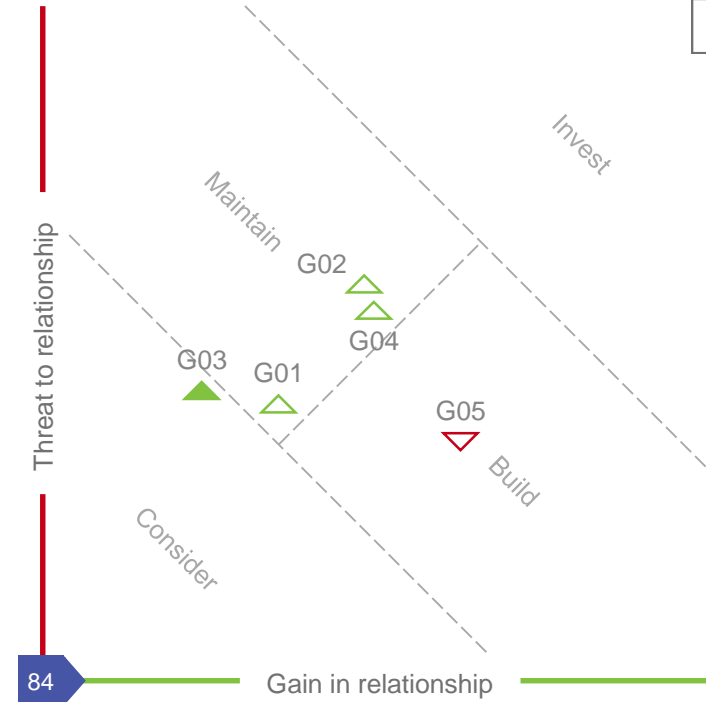
Ease of obtaining information

Ease of understanding information

Quality of information provided

Availability/accessibility of information via online sources/apps

Ease of finding tourist information centre



TRIM

84



Far below average



Below average



Average



Above average



Far above average



Addressing the weak performances in terms of value for money and availability of locally produced/sourced foods is likely to strengthen relationships with visitors and further improve the reputation of eating out in Jersey.

Eating out

- △ D01 Range of cafes and restaurants
- ▲ D02 Quality of food
- ▲ D03 Level of service
- ▼ D04 Value for money/cost of eating out
- △ D05 Child/family-friendliness of cafe/restaurant
- D06 Availability of locally produced/sourced foods



Fabulous food, fresh and excellent service.

Food expensive and pubs shut early especially on Sunday.

Good quality but expensive.

No sign of local products not marked jersey new potatoes just new potatoes.

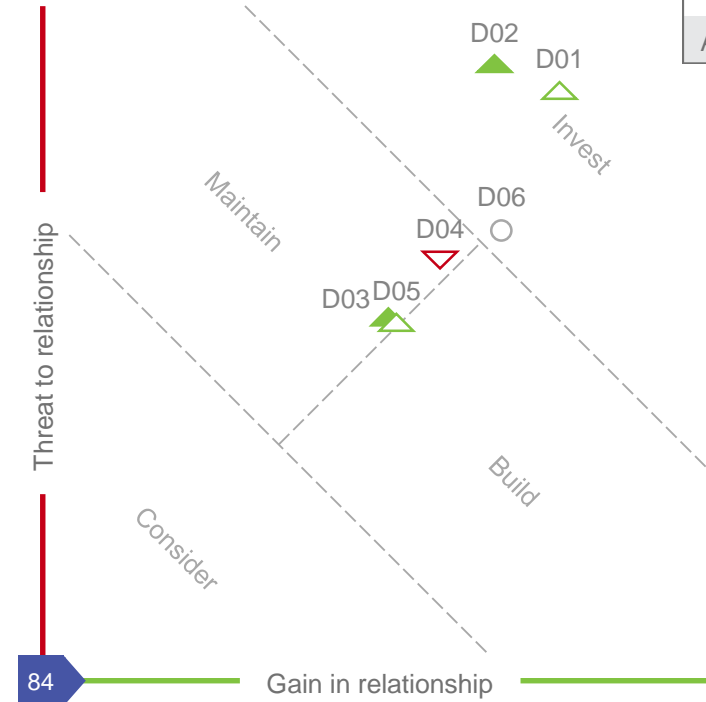
Wide price range and choice.



No.4 in Strength of Pull

Eating Out

Range of cafes and restaurants
Quality of food
Level of service
Value for money/cost of eating out
Child/family-friendliness
Availability of locally produced/sourced foods



TRI'M

84



Far below average



Below average



Average



Above average



Far above average



Immediate items for consideration are the cost and frequency of flights and ferry crossings. The threat to the relationship with visitors is currently not too high, but performance is far below average.

Transportation to/from Jersey

- B01 The choice of transportation to/from Jersey
- ▽ B02 The availability of flights/ferry crossings on my preferred travel dates
- ▼ B03 Cost of flights/ferry crossings
- ▼ B04 Frequency of flights/ferry crossings



Quite expensive and only one ferry.

The cost of flights is prohibitive, otherwise we'd come here more often. It's a big part of the holiday cost.

Very quick and easy.

Slight delay with flights but smooth once aboard plane.

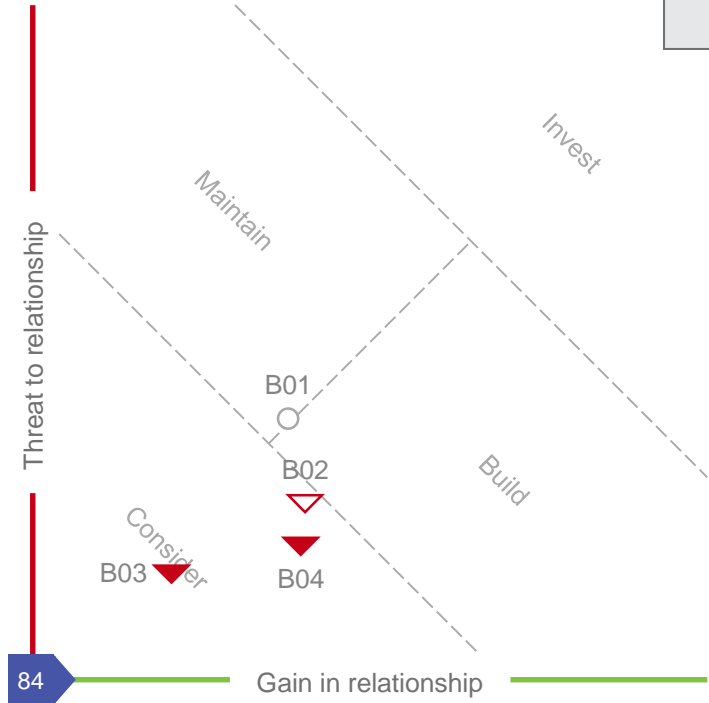
Flights excellent and on time.

Ok but need more flights.



No.5 in Strength of Pull

Transport to/from Jersey
Choice of transportation
Availability of flights/ferry crossings on my preferred travel dates
Cost of flights/ferry crossings
Frequency of flights/ferry crossings





Frequency of public transport services has received praise and it is recommended that this an area for investment. There is also scope to invest in the prevalence of pedestrian signage and the cost of public transport because both pose high threats to relationships if ignored.

Transportation getting around Jersey

- C01 Variety of transportation
- C02 Availability of hire car services
- ▼ C03 Availability of car parking
- ▼ C04 Cost of car parking
- ▲ C05 Frequency of public transport services
- ▲ C06 Taxi services
- ▼ C07 Cost of public transport**
- ▼ C08 Prevalence and clarity of road signage
- ▼ C09 Prevalence and clarity of pedestrian signage



The bus service is excellent, really good - and very affordable.

The couple of times that we took taxis we found them far too expensive.

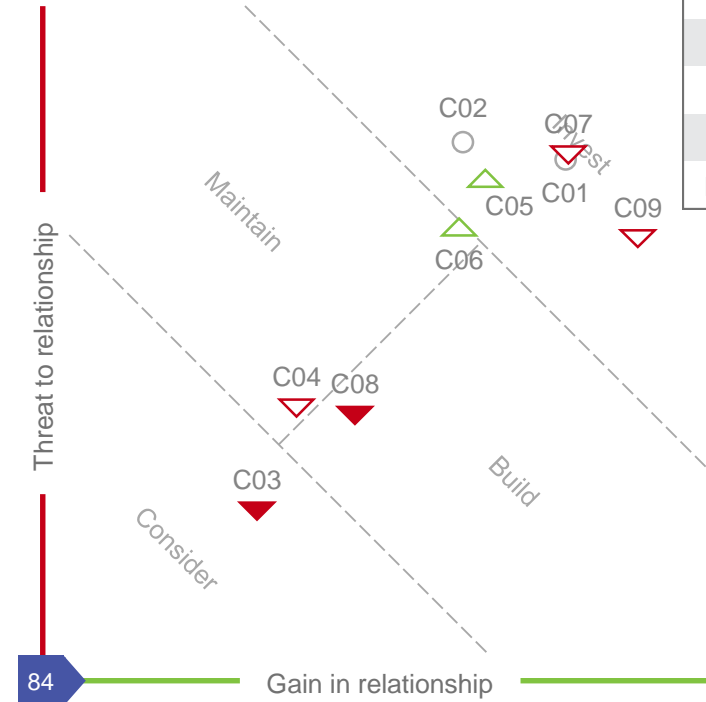
Little frustrating, signs hard to see.



No.6 in Strength of Pull

Transport getting around Jersey

Variety of transportation
Availability of hire car services
Availability of car parking
Cost of car parking
Frequency of public transport services
Taxi services
Cost of public transport
Prevalence and clarity of road signage
Prevalence and clarity of pedestrian signage



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Far below average



Below average



Average



Above average



Far above average

Cost of public transport exhibited a below average performance in Jersey, but only a handful of people mentioned the cost of taxis when asked to recall their experience of transportation

Thoughts and views on the taxi service in Jersey



432 visitors gave their thoughts on the transportation services in Jersey



Of these, **5** mentioned the **cost** of the taxi service.

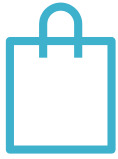
“Taxi service far too expensive”

“Taxis charged a fortune the evening”

“The couple of times that we took taxis we found them far too expensive.”

“Had a bad experience with a taxi driver which charged me a lot more money than the metre shown so I confronted him and we began to argue”

“Unhappy with bus service from winery on bank holiday, a lot of people stranded had to pay for very expensive taxi”



Retail priorities include reviewing the range of shops available and the opening hours of these shops because they currently pose a relatively high threat to the strength of the visitor relationship.

No.8 in Strength of Pull

Shopping

Range of shops available
Quality of merchandise available in the shops
Opening hours of the shops
Helpfulness and friendliness of staff
Value for money/cost of merchandise
Availability of local products

Shopping

- F01 Range of shops available
- F02 Quality of merchandise available in the shops
- ▼ F03 Opening hours of the shops
- △ F04 Helpfulness and friendliness of staff in the shops
- ▽ F05 Value for money/cost of merchandise
- F06 Availability of local products



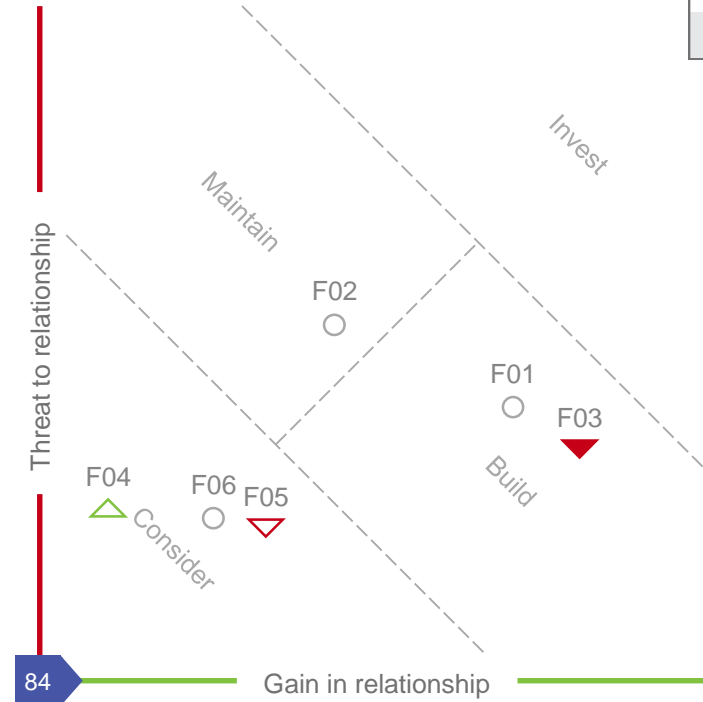
We'd expect more shops to be open on a Sunday, especially for day trippers.

Expensive, limited choice. Many shops closed.

Staff very friendly.

Enjoying buying local products.

Food is expensive in supermarkets.



TRI'M

84



Far below average



Below average



Average



Above average



Far above average



The weakest part of Jersey's offer is its evening activities, but visitors also placed the least importance on this aspect. Consequently, there is not an immediate need to drastically improve things, but over time, the range, value and quality of such activities all need to be considered.

No.9 in Strength of Pull

Evening Activities

Range of things to see and do in the evenings/night
Availability of family-friendly evening activities
Feeling safe whilst experiencing the evening activities
Value for money/cost
Quality of evening activities

Evening activities

- ▼ H01 Range of things to do in the evenings/night
- H02 Availability of family-friendly evening activities**
- ▲ H03 Feeling safe whilst experiencing the evening activities
- ▼ H04 Value for money/cost of evening activities
- H05 Quality of evening activities



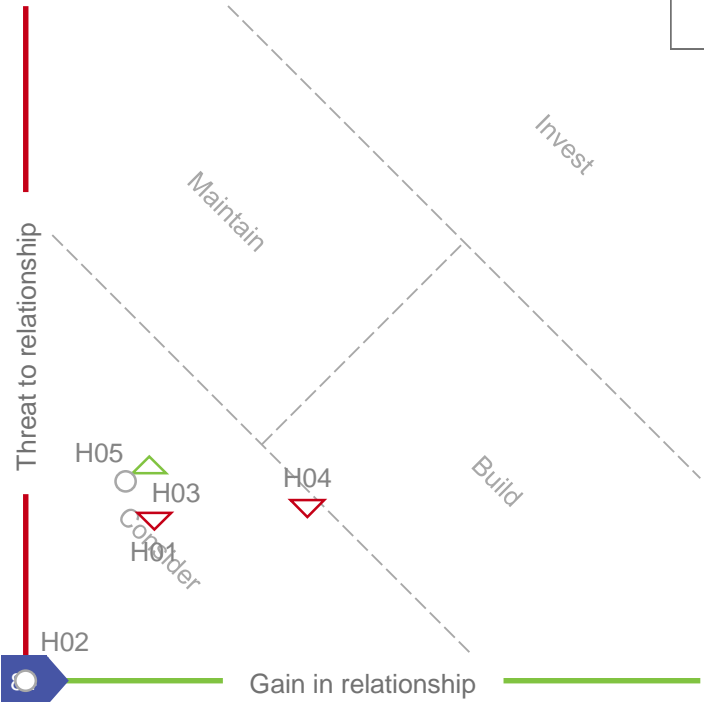
Overpriced but enjoyable.

Will eat out every night apart from Sunday when it rained. Enjoy walks at night feel safe and happy.

Good pubs and felt safe.

Nothing to do in evenings everything shuts at six- a ghost town.

Hotel has kept us entertained.



TRI*M

84



Far below average



Below average



Average



Above average



Far above average

Summary of relative strengths and weaknesses

Despite evening activities performing poorly overall, there are other weak areas which require some attention. Some aspects, such as the range of accommodation and cost of public transport, are part of high-scoring overall areas (accommodation, transport in Jersey) and so fine tuning the smaller details is a good way to maintain overall strong performances.

Accommodation	Strengths
Quality of accommodation Helpfulness and friendliness of staff at accommodation	
Transportation getting around Jersey	
Variety of transportation Availability of hire car services Frequency of public transport services Taxi services	
Eating out	
Range of cafes and restaurants Quality of food Level of service Child/family-friendliness of café/restaurant	
Things to see and do	
Range of things to see and do Quality of experience provided at attractions and/or when taking part in activities Helpfulness and friendliness of staff when visiting attractions and/or taking part in activities	
Tourist information	
Ease of understanding information Availability/accessibility of information via online sources/apps	

Accommodation	Weaknesses
Range of accommodation available Value of money of accommodation	
Transportation getting around Jersey	
Cost of public transport Prevalence and clarity of pedestrian signage	
Eating out	
Value for money/cost of eating Availability of locally produced/sourced foods	
Shopping	
Range of shops available Opening hours of the shops	
Information	
Ease of finding Tourist Information Centre	

Action prioritisation

Immediate priorities to strengthen visitor relationships are to address the perceived high cost of public transport and increase the prevalence of pedestrian signage and locally produced/sourced foods. There are also some areas in which Jersey already performs well but additional investment could further strengthen relationships – these include the quality of accommodation and food and the range of things to see and do.

	Accommodation	Transportation getting around Jersey	Eating out	Things to see and do	Shopping
Fix it now		<div>▼ C07. Cost of public transport**</div> <div>▼ C09. Prevalence and clarity of pedestrian signage</div>	○ D06. Availability of locally produced/sourced foods		
Fix it later	<div>○ A02. Range of accommodation available</div> <div>○ A04. Value for money of accommodation</div>				<div>○ F01. Range of shops available</div> <div>▼ F03. Opening hours of the shops</div>
Expand	<div>▲ A01. Quality of accommodation</div>	<div>○ C01. Variety of transportation</div> <div>○ C02. Availability of hire car services</div> <div>▲ C05. Frequency of public transport services</div>	<div>▲ D01. Range of cafes and restaurants</div> <div>▼ D02. Quality of food</div>	<div>▲ E01 Range of things to do and see</div> <div>▲ E03. Helpfulness and friendliness of staff when visiting attractions and/or taking part in activities</div>	

▼ Far below average ▼ Below average ○ Average ▲ Above average ▲ Far above average

Most of the negative comments about the value of money in Jersey referred to the high costs of activities and eating out. Many felt it was more expensive than the rest of the UK.

Value for money

Positives



Get what you pay for. Quality is important and this comes across in Jersey.

Yes, have been all over Jersey and it is good value for money.

Jersey appears to be a very good venue for coastal walks and therefore very good value for money.

Jersey is great, love everything and happy to pay.

Jersey is very good value for money, clean and well cared for, nothing has been neglected, no unopened shops, all tourist attractions well looked after.

Jersey is value for money, been three times, lots to do and great food.

Jersey is value for money, some places have doubled in price in the world but not Jersey.

Jersey is value for money, it is peaceful and free of stress so worth every penny.

Jersey is great value for money, will come back again and again, it's a home from home.



Negatives



Everything is expensive here. We haven't managed to do a lot as most things cost you an arm and a leg.

Eating out is expensive compared to the UK.

Jersey has lost a lot of its night activities and not good value for money.

Jersey has lost the plot a bit with prices, sixteen pounds for two drinks is too much.

Didn't expect to pay to go into museums as in UK only give donation, Jersey is not value for money.

Jersey is getting a bit too expensive, noticed all prices gone up or aimed at young children.

Jersey is very poor value for money, nothing of interest, too built up and no gardens.

We have noticed a big increase in the cost since last years visit to the island.

Jersey is not value for money, heritage sites and food are too expensive.



Positive key memories of Jersey feature the variety of things to see and do as well as the friendliness of its people. On the other hand, high prices and lack of information were prevalent themes for negative memories.

Key Memory

Positives



Love Jersey, it's very pretty and has pleasant people. Love the fact people have time to stop when you cross roads.

Sunset at St Brelade's last night. It was a glorious evening and the tide was in. That's what is so special about Jersey and is why we keep coming back.

Jersey Zoo. We think it's fabulous. It's beautiful, well run, informative, and we're passionate about the work they do.

From what we've seen so far we've been very impressed. The island is stunning. The whole place is a pleasure, it's got a bit of magic to it.

There isn't one thing that stands out - the whole ambience and politeness is great. Astounded by how polite people are and the Jersey way is great. People can't do enough for you.

Yesterday was a magical day with the full island tour, saw lots of wonderful historic things, beautiful, stunning beaches, safe for children, good for parents. Very good cafes and things on offer.

The beaches are fantastic, and so clean. We love St Brelade's and St Ouen's Bay.



Negatives



The key memory this visit is the amount of cars and busy way of life.

Unfortunately, it's the fact that there's no car parking at our hotel (Pomme d'Or) as my husband has a disability, it has been a real pain.

Island has become overpopulated compared to first visit in 1962.

Feel lost re. information and helpfulness of maps. Tourism office needs to be very clearly sign posted.

Key memory is that unfortunately how the island has changed, not for the better, e.g. things have become too commercialised.

Full of cars and permanent traffic jams.

Difficult to find things in Jersey.

Sick of Condor ferry which is often late and very uncomfortable. No day trips from Poole.

Not happy with prices, far too expensive.

Not enjoying Jersey much, prefer England.



Summary of Jersey

Overview

Jersey's relationship index of 84 is driven by its high performance score of 103.

- There is an immediate need to drive up preference to increase overall visitor relationship.
- Particular focus on the 35-54 age group who are relatively well disposed to Jersey and represent a segment worth investing in for the future
- Jersey performs well on factors important to its visitors such as 'things to see and do', 'accommodation' and 'eating out'.
- 'Tourist information' is also important to visitors – Jersey need to improve on this score to bring it more in line with their performance in other important areas.
- Transport in Jersey was another high-performing driver, but two areas of weakness were the cost of the service and the prevalence and clarity of pedestrian signage.

There were varying strengths of relationships amongst key sub-groups

- Visitors who had or were planning to hire a car were the most favourable towards Jersey overall. The availability of hire car services was a strength of the Jersey visitor experience.
- Those visiting friends and family and those travelling with children also scored highly.
- Parties with children were particularly positive towards food, helpfulness of staff and ease of understanding tourist information.
- On the other hand, they were dissatisfied with the cost of merchandise, availability of car parking and the range of accommodation available.
- First time visitors were the group least satisfied with Jersey. Particular problems were the ease of finding the tourist information centre, the opening hours of shops and frequency of ferry crossing and flights.

Factors that matter most

- Things to see and do
- Accommodation
- Tourist information

Priority areas of focus

- Cost of public transport
- Prevalence and clarity of pedestrian signage
- Availability of locally produced/sourced foods

Positive areas in which to invest and expand

- Quality of accommodation
- Transport
 - Variety
 - Availability of car hire services
 - Frequency of public transport services
- Dining and eating out
 - Range of cafes and restaurants
 - Quality of food
- Things to see and do
 - Range of sights, attractions and activities
 - Helpfulness and friendliness of staff

In summary...

How strong is the relationship between Jersey and its visitors with regards to performance and preference?

Performance is strong but Preference could be improved to consolidate a competitive advantage

Which factors of the Jersey experience are most important to visitors?

The three most important drivers are 'things to see and do', 'accommodation' and 'tourist information'.

How does Jersey as a tourist destination perform on these important factors?

Jersey performs well on 'things to see & do' and 'accommodation' but their performance for 'tourist information' could be improved to bring it more in line with the top 2

What are the strengths and weaknesses of the key attributes of the Jersey visitor experience?

Quality of the accommodation in Jersey was a particular strength as well as the range of things to see and do amongst many others. Particular weaknesses included the value for money of eating out and accommodation

What do people think of the overall value for money of Jersey as a tourist destination?

Whilst many praised the range of things to see and do as validation for the costs, others think the island is becoming more and more expensive over time, especially compared to the rest of the UK.

What are the key memories that visitors have of Jersey?

Many remember the people and scenery positively, but negative memories included increasing road traffic, prices and commercialisation

3

Jersey – the competitive context



In this section...

How strong is the relationship between Jersey and its visitors with regards to performance and preference compared to that of competitor destinations?

Does the ranking of relationship strength of Jersey and competitor destinations differ amongst key subgroups?

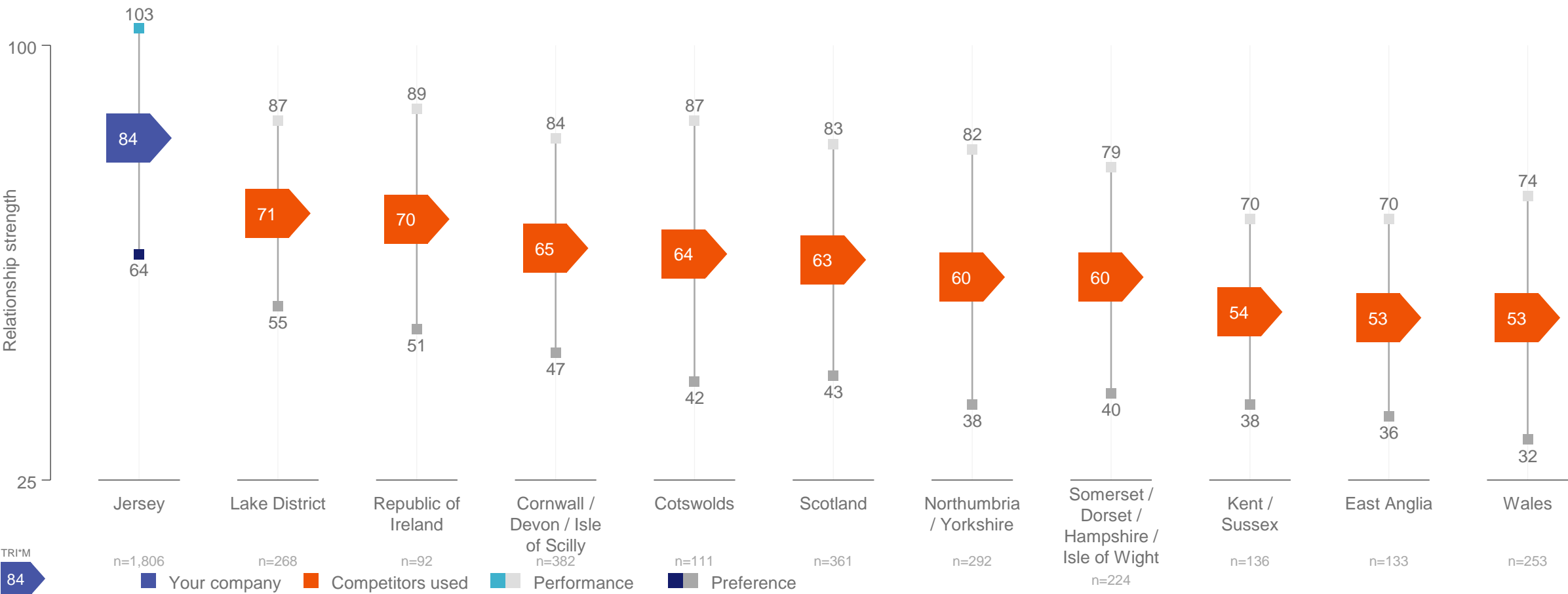
In which specific attributes does Jersey score well compared to competitor destinations?

Are there any major differences in perceived performances against competitor destinations amongst key subgroups?

How do people rate the quality of Jersey's beaches, countryside, villages, and towns compared to the rest of the UK and Republic of Ireland?

Jersey outperforms its UK and Ireland competitors for relationship strength. This is mainly driven by a high performance score compared to the other destinations.

Visitor Relationship Index – Jersey

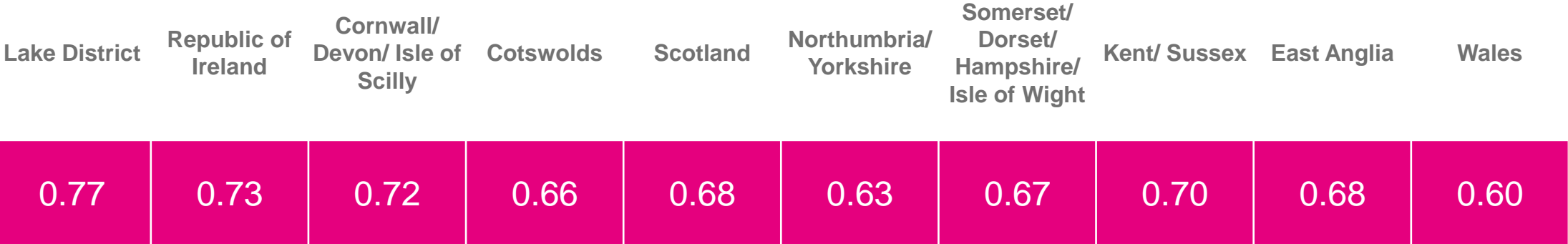


A key to strengthening visitor relationships is to develop a competitive advantage by being in the position of being the most preferred tourist destination. This will help keep the overall relationship strong even if performance suffers.

Contribution of Preference to Visitor Relationship Index

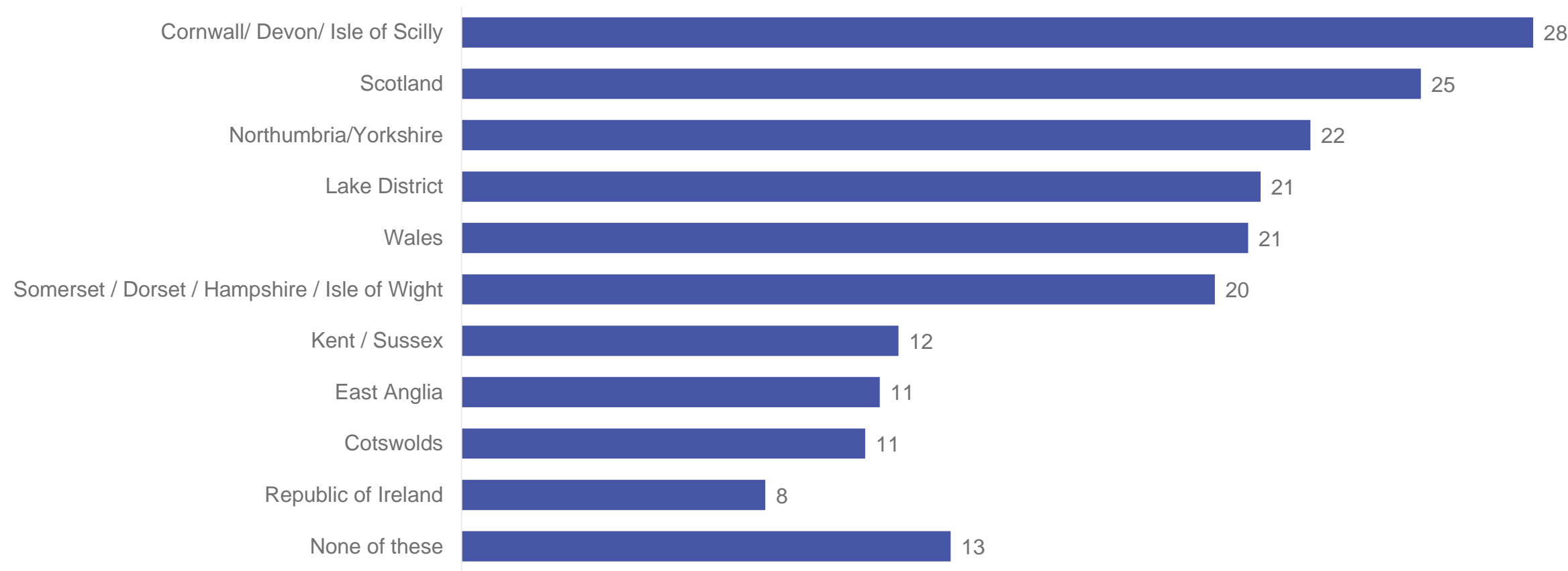
Jersey

By dividing the Preference score by the overall index score, we can understand the size of the preference in comparison to the overall score. The higher the number, the more influence preference has on relationship strength.



More than 8 in 10 had previously visited at least one of the competitor destinations in the last 3 years. Cornwall/ Devon/ Isle of Scilly was the most popular

Where have people been in the past before their last visit to Jersey? (%)



Lake District and Cornwall/Devon/Isle of Scilly were strong performing destinations amongst most key subgroups. Scotland scored particularly well with couples and those seeking weekend and short breaks.

TRI*M Index – Jersey vs. competitor destinations

Subgroups – top 5 Visitor Relationship Scores

First Timers

Jersey	80
Lake District	72
Republic of Ireland	70
Cornwall, Devon, Isle of Scilly	67
Cotswolds	66

Couples (no children)

Jersey	82
Republic of Ireland	70
Lake District	69
Scotland	65
Cotswolds	63

Repeat Visitors

Jersey	88
Lake District	70
Republic of Ireland	70
Cornwall, Devon, Isle of Scilly	64
Cotswolds	63

Weekend/short break

Jersey	88
Scotland	75
Lake District	68
Cornwall, Devon, Isle of Scilly	66
Somerset, Dorset, Hampshire, Isle of Wight	64

Families with Children

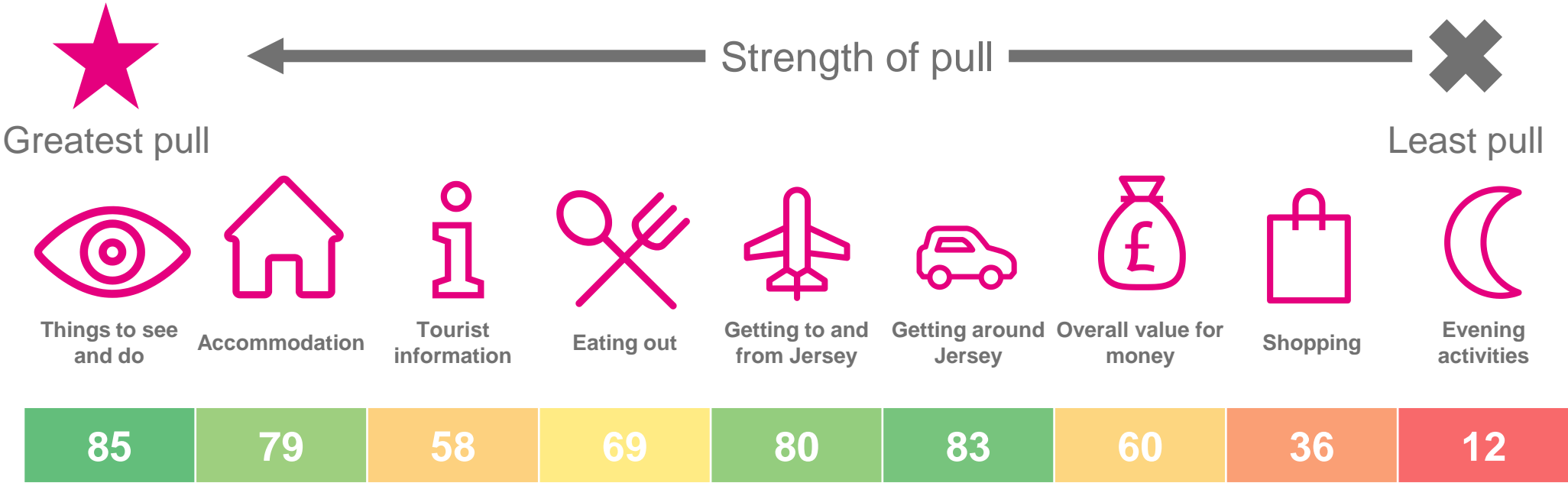
Jersey	90
Cornwall, Devon, Isle of Scilly	76
Lake District	67
Somerset, Dorset, Hampshire, Isle of Wight	60
Scotland	53

Longer holiday

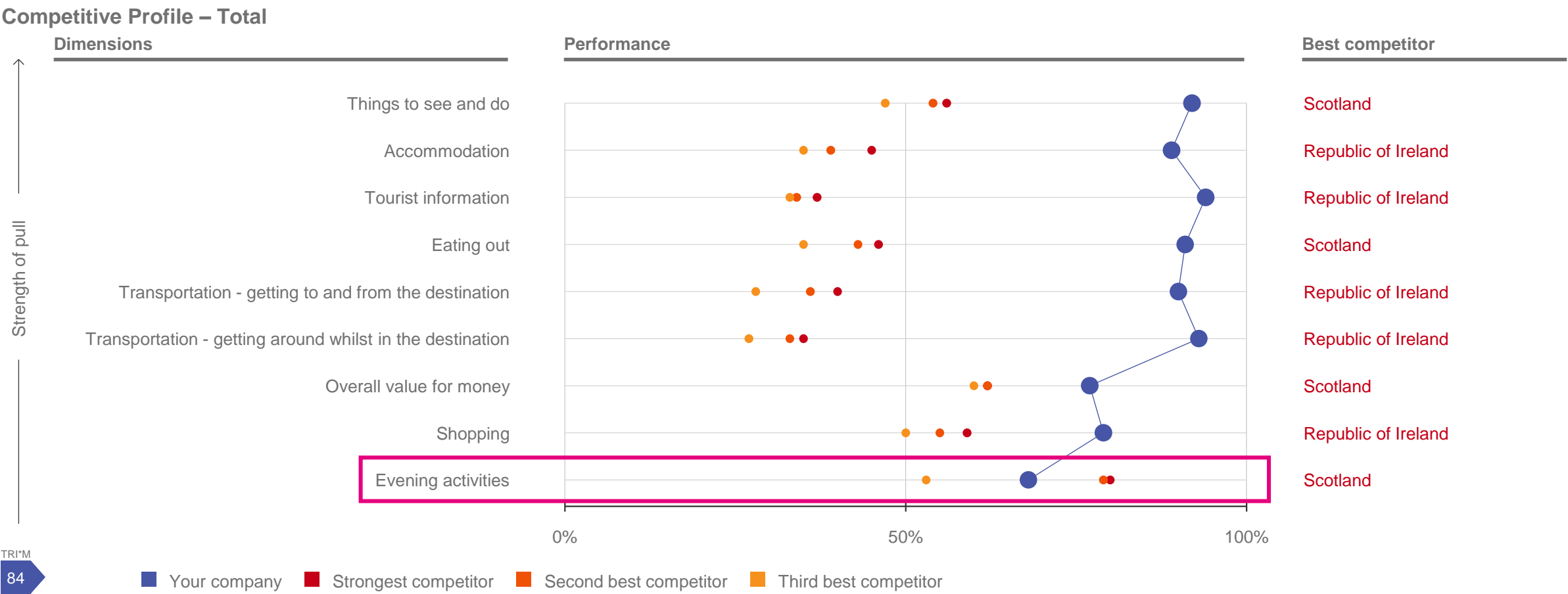
Jersey	83
Lake District	71
Republic of Ireland	68
Cotswolds	67
Cornwall, Devon, Isle of Scilly	65

Jersey performs well on factors most important to visitors, but there is scope to improve tourist information. This should be an area of focus because its rating is not as high as other important drivers.

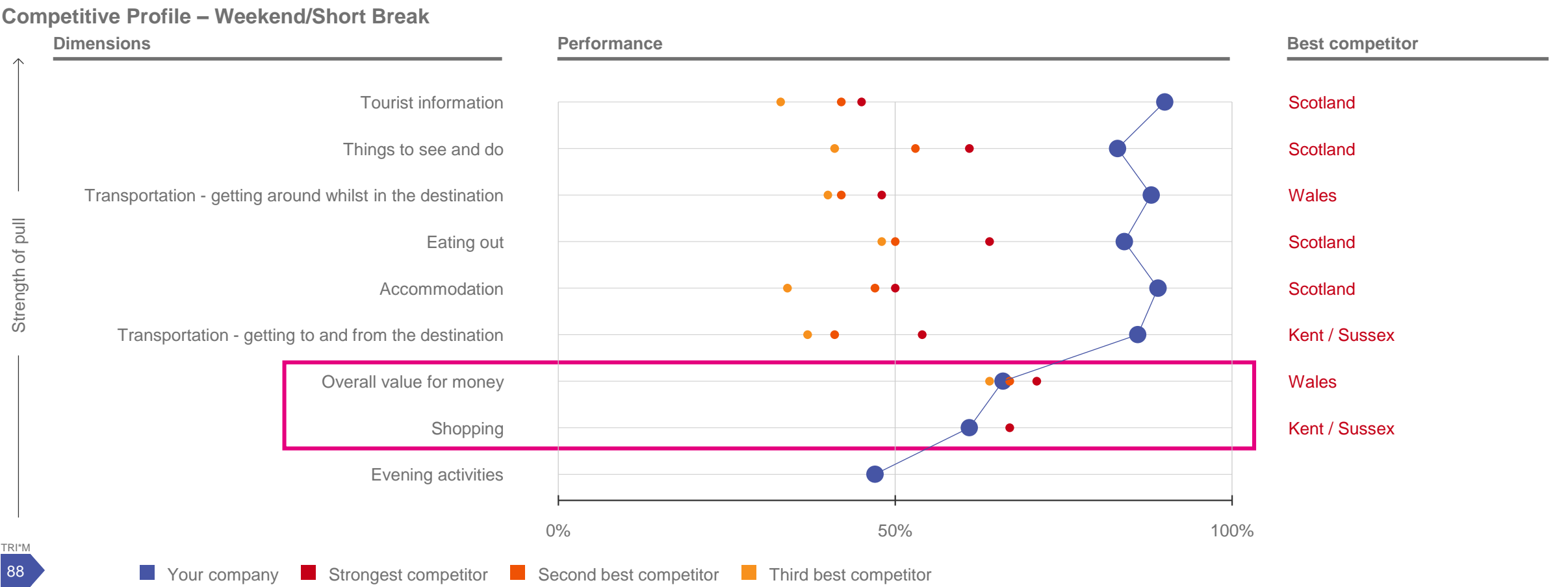
Strong performance on high level drivers (%)



Evening activities is the one dimension on which Jersey falls behind the competition at a total level. However, visitors place the least importance on this particular attribute.

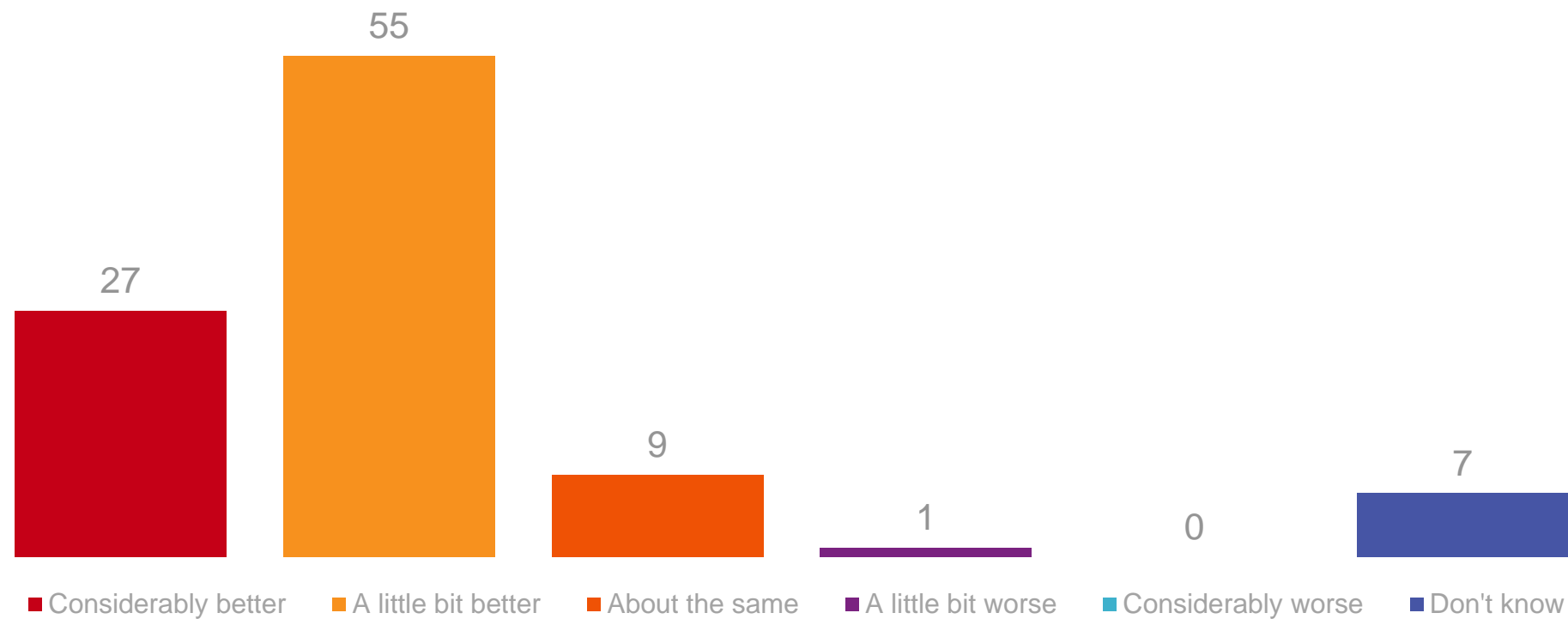


According to those who visited for a weekend or short break, Jersey is also behind other destinations for overall value for money and shopping.



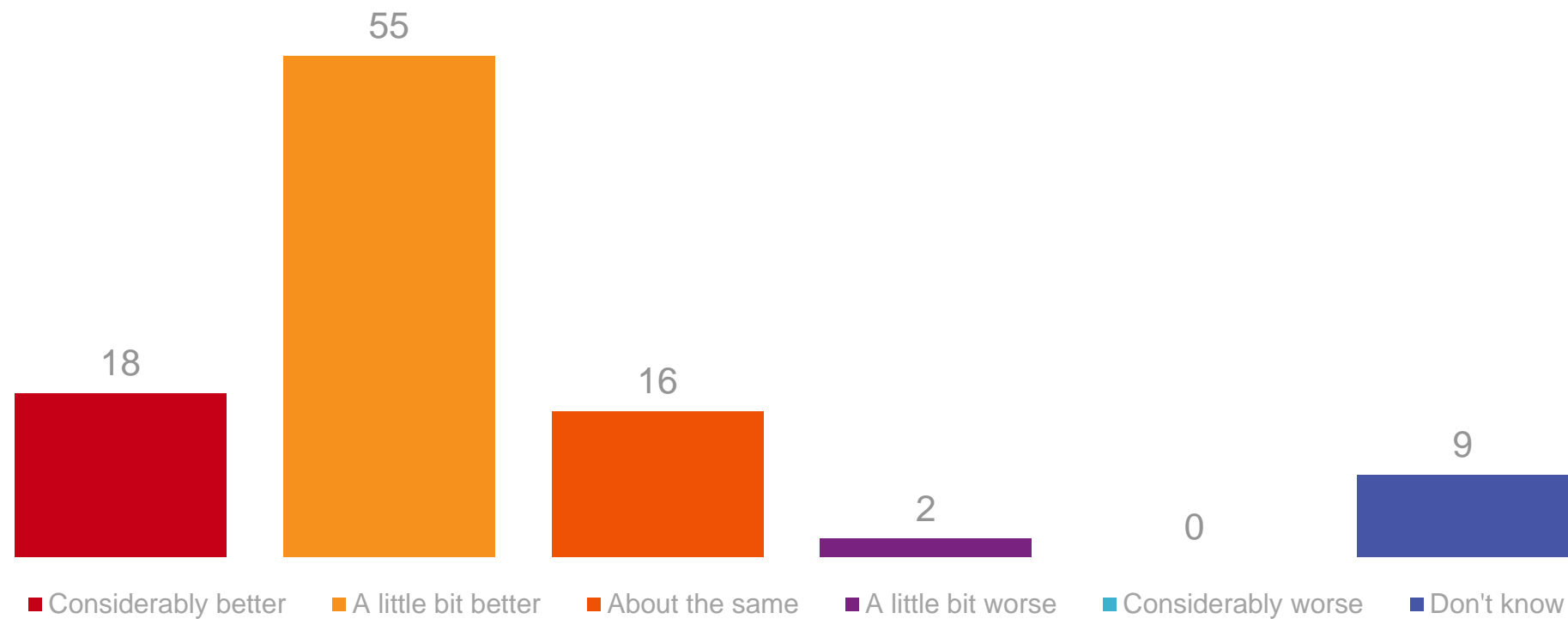
The beaches in Jersey are a popular and well-regarded feature of the island with over 8 in 10 people considering them better than the rest of the UK and Ireland.

Jersey compared to other UK and Ireland destinations – Beaches (%)



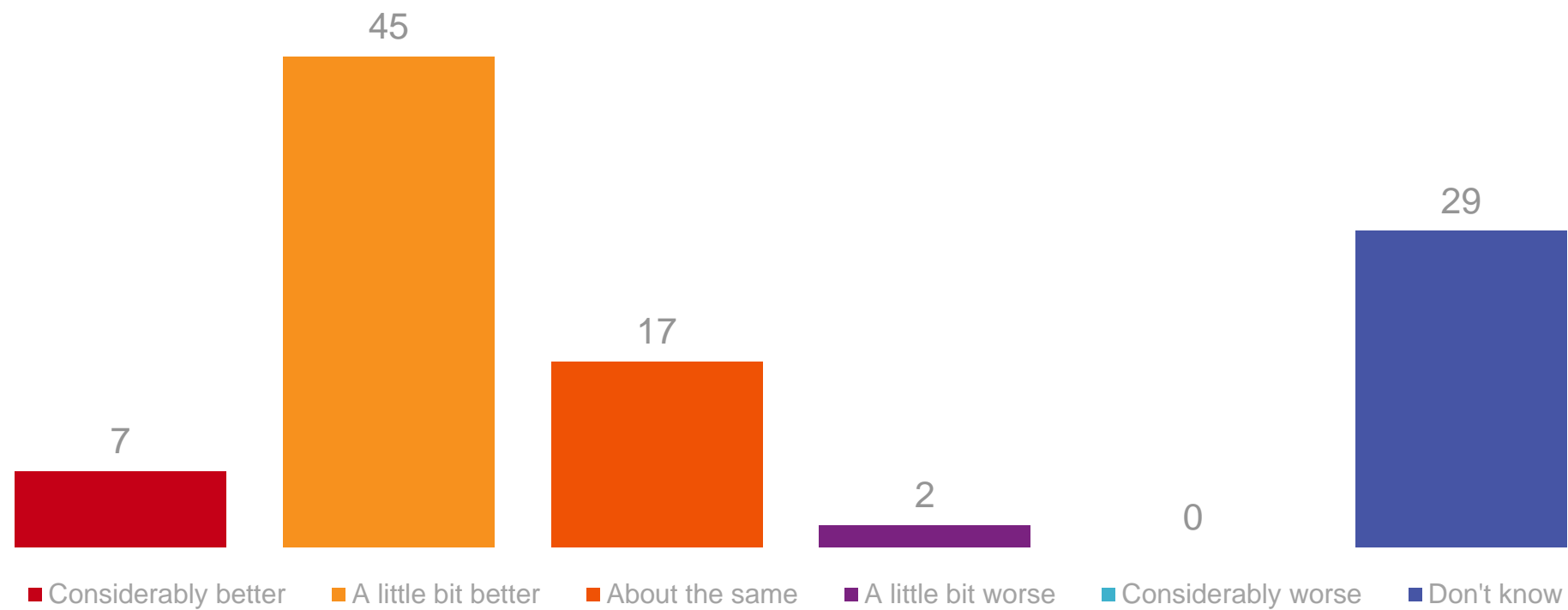
Jersey's countryside also has a good reputation

Jersey compared to other UK and Ireland destinations – Countryside (%)



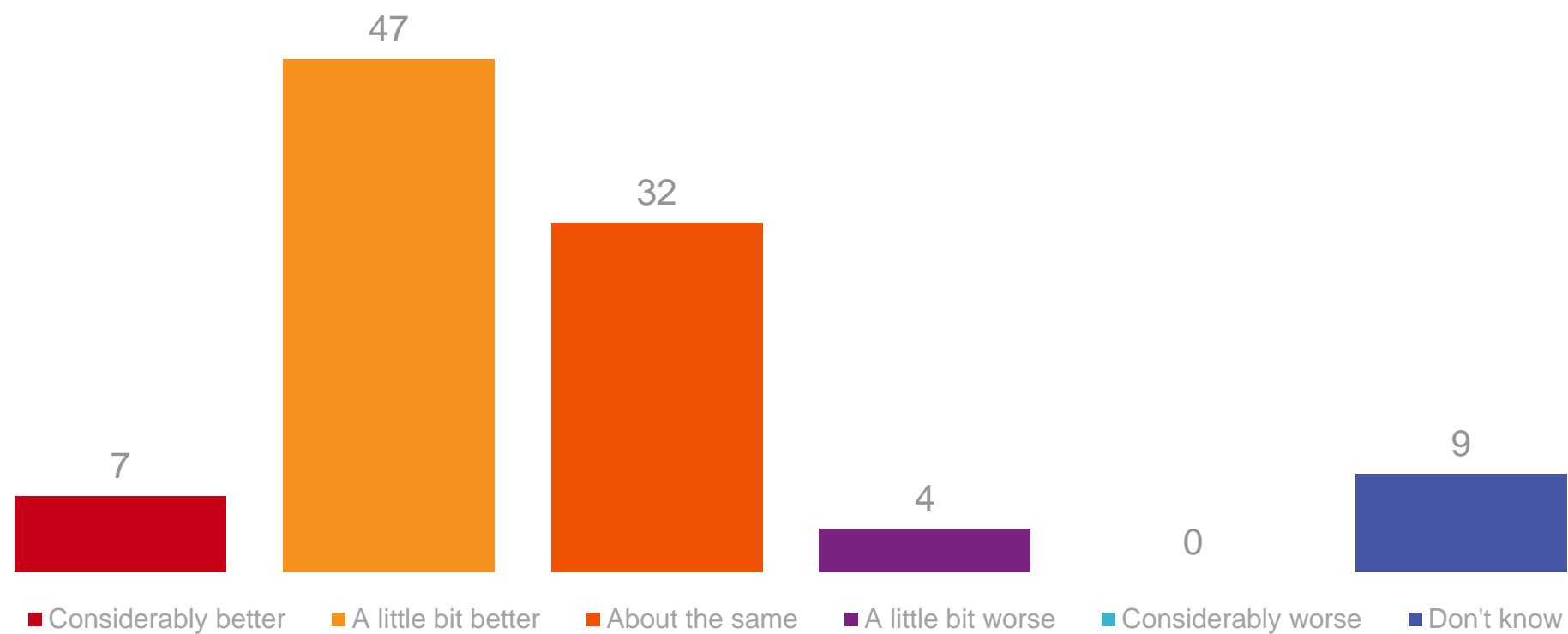
A relatively large number of people stated that they ‘don’t know’ if Jersey’s villages are better than others in the UK and Ireland.

Jersey compared to other UK and Irealnd destinations – Villages (%)



A relatively large proportion of visitors rated the towns in Jersey the same as the rest of the country and Ireland. Similar to its villages, the unique features of Jersey’s towns need to be highlighted in order to distinguish the island from other destinations.

Jersey compared to other UK and Ireland destinations – Towns (%)



To summarise - Jersey versus the competition

Overview

Overall, Jersey outperforms competitor destinations on most key measures

- Jersey records a higher visitor relationship index than all competitor destinations.
- The same is true amongst key subgroups, although the ranking after Jersey varies.
- Lake District performs well with most subgroups, whereas Scotland is particularly popular with couples and those seeking weekend or short breaks.

Jersey needs to address the lukewarm response to its offer of evening activities

- Although visitors to Jersey do not regard evening activities as a highly important factor, it is the only attribute on which Jersey is outperformed by rival destinations at a total level.
- Performance levels and ranking amongst other destinations are fairly consistent across subgroups. However, there are a couple of points of note:
 - Amongst weekend and short break visitors, Jersey is outperformed by two other destinations for overall value for money. It is also second to Kent/Sussex for shopping.
 - However, Jersey is well ahead of the competition for accommodation and transportation in Jersey when rated by those with a long-standing disability of impairment

Beaches, countryside, towns and villages

- Only a handful of visitors (7 people) rated Jersey 'considerably worse' than other destinations in the UK or Ireland for its beaches, towns, villages and/or countryside.
- Around half of visitors thought Jersey was 'a little bit better' than its counterparts in all of these areas.
- A third of visitors of stated 'don't know' when asked how Jersey's villages compared to the rest of the UK or Ireland.
- Jersey's beaches received the best rating, with over 8 in 10 visitors claiming they thought the beaches were better than those found elsewhere in the UK or Ireland (27% 'considerably better; 55% 'a little bit better')

In summary....

How strong is the relationship between Jersey and its visitors with regards to performance and preference compared to that of competitor destinations?

Jersey has the strongest score amongst the competition. This was expected given we were interviewing in Jersey during the visit

Does the ranking of relationship strength of Jersey and competitor destinations differ amongst key subgroups?

The same four or five destinations frequently appear as the most popular amongst most of the subgroups. Scotland is particularly popular with people taking weekend trips or short breaks, whilst families with children rate Cornwall, Devon and Isle of Scilly higher than most other destinations

In which specific attributes does Jersey score well compared to competitor destinations?

Jersey outperforms competitor destinations on all key drivers at total level other than evening activities where Scotland is the best performer

Are there any major differences in perceived performances against competitor destinations amongst key subgroups?

Amongst subgroups, the ratings are more or less in line with total levels. A couple of standouts are the overall value for money and shopping amongst weekend and short break visitors, who rated Jersey lower than Wales and Kent/ Sussex respectively

How do people rate the quality of Jersey's beaches, countryside, villages & towns compared to the rest of the UK and Ireland?

None of the visitors interviewed rated Jersey 'considerably worse' than other UK and Ireland destinations in the above areas. The most positive aspect was for the beaches, where 82% stated they were better than competitor destinations

Insights and Recommendations

Insights

Jersey has a strong relationship with its visitors and this is reflected in its strong performance score

Preference for Jersey could be a little higher and this is key to sustaining a competitive advantage

Although key subgroups had varying strengths of relationships with Jersey, there was a fairly consistent pattern in their ratings for each of the key drivers

The main variation was that weekend and short break visitors felt that Jersey did not perform as well on overall value for money and shopping as Wales and Kent/ Sussex respectively.

Things to see and do, accommodation and tourist information were factors most important to visitors. The ranking varied slightly between subgroups but these three drivers consistently appeared in the top 4.

One key area of weakness for Jersey is evening activities

Recommendations

Focus on driving up preference of Jersey as this will maintain a strong relationship score, especially if performance deteriorates

The evening activities offer needs consideration. Although not an important driver, it falls behind the rest on performance so should be improved to increase the overall appeal of Jersey

Pay attention to the attributes within drivers that are not performing well. For example, transport in Jersey was well-received but prevalence and clarity of pedestrian signage was a constant pain-point so this would need addressing (Action Prioritisation table)

Weekend/ short break visitors were not as positive about overall value for money and shopping as everybody else, so work could be done in these two areas to be more favourable towards these types of visitors

More could be done increase the appeal of Jersey's beaches and countryside. Visitors already rank these higher than the rest of the UK and Ireland, so these features could be dialled up to attract more attention

4

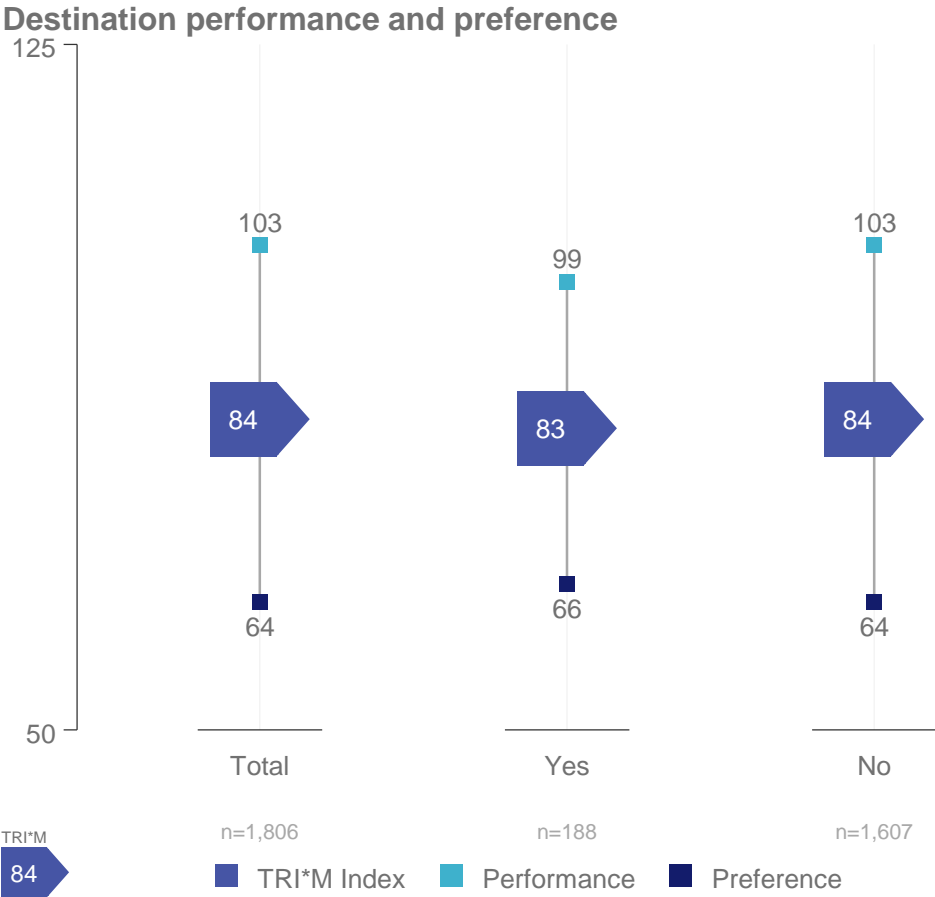
Disabilities and impairments



Disability and impairment profile

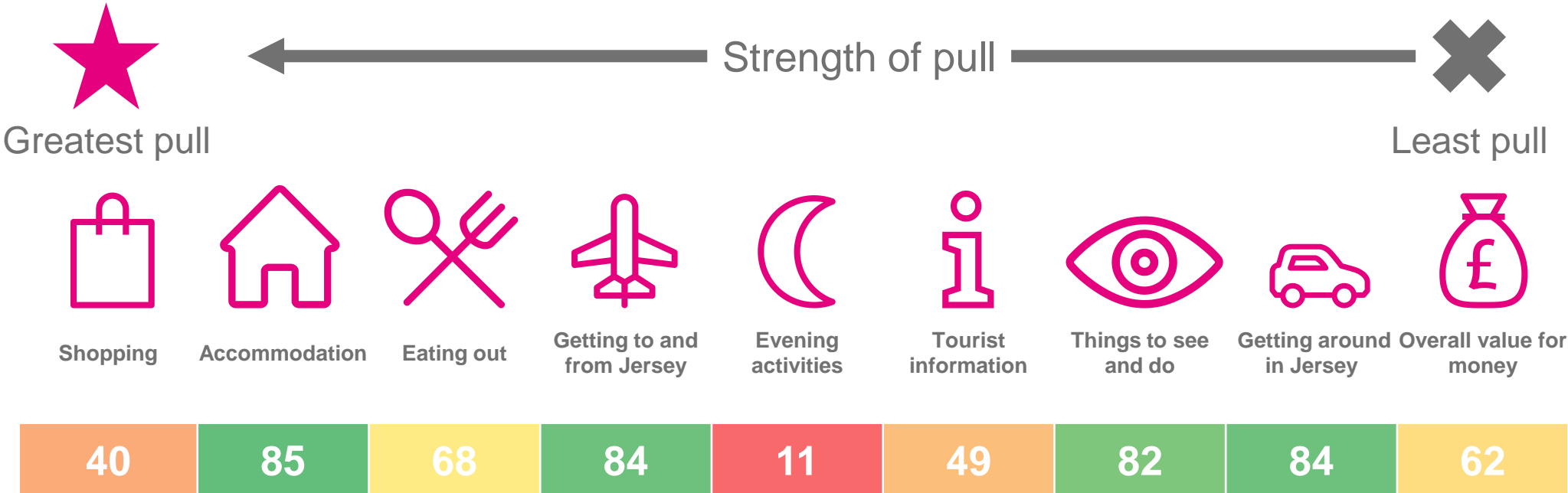
Disability or impairment	Number of visitors
Vision, for example, due to blindness or partial sight	17
Hearing, for example, due to deafness or partial hearing	19
Mobility, such as difficulty walking short distances, climbing stairs, lifting & carrying objects	139
Learning or concentrating or remembering.	10
Mental health	1
Other	19
Don't know	1
Refuse	3

There was hardly any variation in the relationship strength between those with a long-standing disability or impairment and those without. Both were in line with the overall index

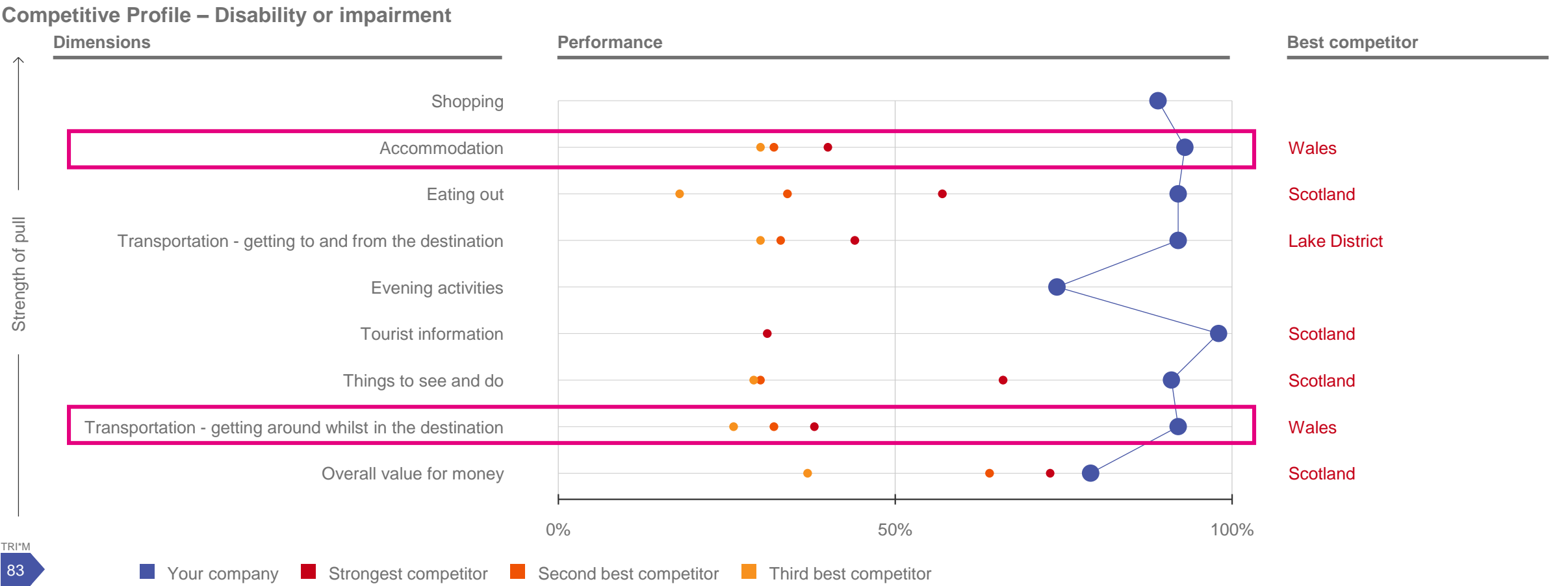


A key area of focus amongst disabled visitors is their shopping experience because it is the most important driver, yet it is one on which Jersey performs poorly

Strong performance on high level drivers (%)



For those who suffer from a disability or impairment, Jersey is well ahead of the competition for accommodation and transport on the island.



Summary of strengths and weaknesses

Despite things to see and do and transportation in Jersey gaining some excellent ratings from disabled and impaired visitors, there were certain aspects of these areas that are performing below average and are considered a weakness. So fine tuning the smaller details is a good way to maintain overall strong performances.

Strengths	Weaknesses
<div>Accommodation</div> <div><div>△</div> Quality of accommodation</div> <div><div>▲</div> Helpfulness and friendliness of staff at accommodation</div> <div><div>○</div> Value for money of accommodation</div> <div>Transportation getting around Jersey</div> <div><div>○</div> Variety of transportation</div> <div><div>○</div> Taxi services</div> <div>Things to see and do</div> <div><div>△</div> Range of things to see and do</div> <div><div>△</div> Quality of experience provided at attractions and/or when taking part in activities</div> <div><div>△</div> Helpfulness and friendliness of staff when visiting attractions and/or taking part in activities</div> <div>Tourist information</div> <div><div>△</div> Quality of information provided</div> <div>Shopping</div> <div><div>○</div> Range of shops available</div> <div><div>△</div> Quality of merchandise available in shops</div> <div><div>△</div> Helpfulness and friendliness of staff in shops</div>	<div>Transportation getting around Jersey</div> <div><div>▽</div> Frequency of public transport services</div> <div><div>▽</div> Prevalence and clarity of pedestrian signage</div> <div>Things to see and do</div> <div><div>▽</div> Value for money/cost of things to see and do</div>

▼ Far below average ▽ Below average ○ Average △ Above average ▲ Far above average

Improving the Visitor Experience

KANTAR TNS