

Exit Survey Analysis – Q1 2018

Provisional estimates suggest that visitors spent £21.4m in Jersey during the first quarter of 2018, representing an increase on the £18.3m spent during the same period of last year, although still a small proportion of overall visitor expenditure, which in the twelve months to March 2018 reached £253.3m.

During the first quarter of the year the amount generated per visit was £282, which compares with £229 a year earlier.

Overall it is estimated that with 79,000 visits the island welcomed 1% fewer visitors in the first three months of 2018 than it did during the first quarter of 2017, while the number of visitor nights fell rather more sharply (by 22%) although this is in part explained by the Exit Survey having picked up a relatively high volume of visitors with a lengthy stay back in the early part of 2017.

Although the estimate for the number of Holiday visits during the first quarter was lower than for the same period of last year the Net Promoter Score among Holiday visitors was notably higher, up from 46 to 54.

Thanks to there having been less disruption to air services at Jersey Airport than was the case in the first three months of 2017 the Business visits market has enjoyed growth of 15% so far in 2018.

Visits from the UK are tracking 5% down compared with the first three months of last year, whereas with a return of travel by French school groups volumes from France are substantially up. The advent of greater accessibility between the Channel Islands thanks to Waves has helped deliver a 10% uplift in visits from Guernsey.

The number of overnight visitors (which is what defines someone being a 'tourist') fell 6% in the first quarter, while the number of those making a day trip, known as 'excursionists', was up substantially in comparison with the early part of 2017.

So far in 2018 32% of visitors have been making their first trip to the island, almost identical to the 33% during the first three months of last year.

Ratings for different aspects of the respondent's experience in Jersey remain stable, with the strongest performance being for Safety & Security, Beaches / Countryside and Cleanliness, each achieving around 4.7 out of 5, whereas Value for Money continues to achieve a lower score of 3.7.

Data for Q1 does not include any impact from Easter, as although the Easter weekend straddled both March and April, as data relates to departure from Jersey those visiting for Easter will not be picked up until the April results are available.

During the year ending March 2018 there were 726,000 visits to the island, with a cumulative 2.85 million visitor nights. The average length of stay for those staying at least one night was 4.6 nights.

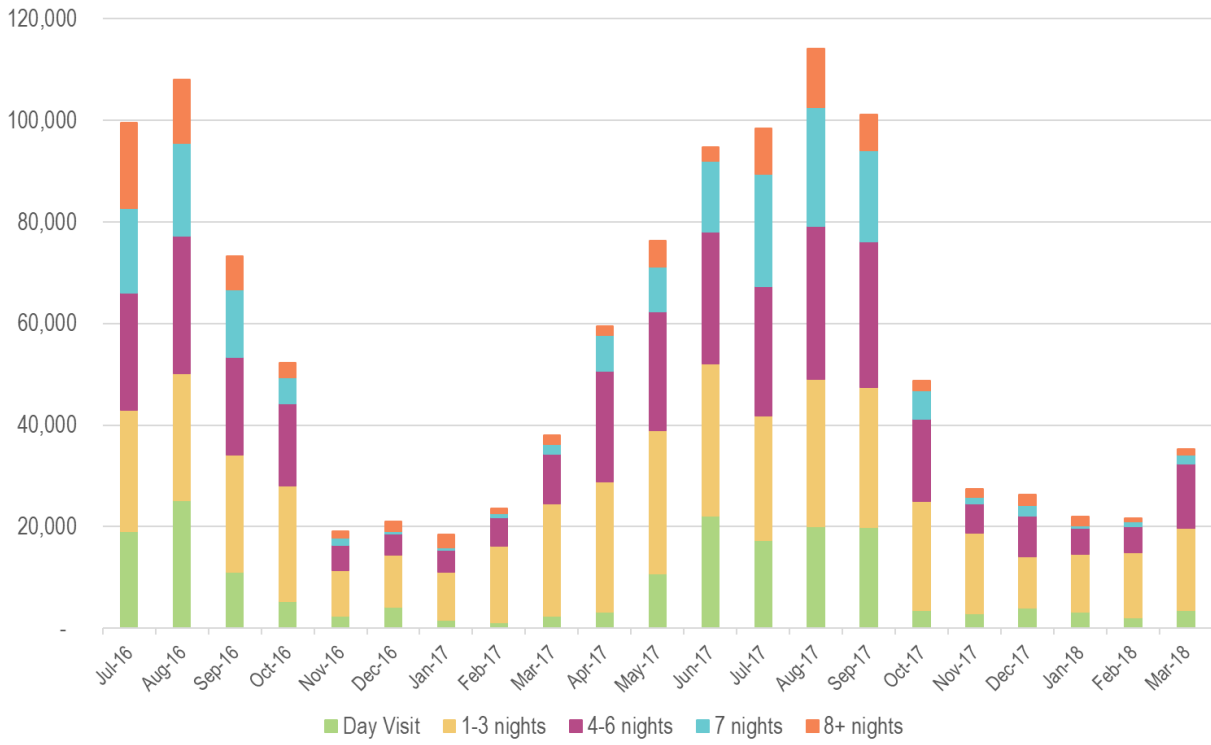
The following summary tables present key data from the Exit Survey, but it is recommended to focus more on the data for the rolling three, and rolling twelve months, periods, rather than that for a single month, as this can be influenced by comparatively low sample sizes, especially during the quieter months of the year. Year-on-year changes on a rolling twelve-month basis will be available once data through to June 2018 exists.

There then follows a series of charts that paint a picture of visits by month since the commencement of the Exit Survey, with splits by journey purpose, country of residence, duration of stay, mode of travel, Net Promoter Score, average length of stay for Holiday visits and whether the visitor is making his or her first visit to the island.

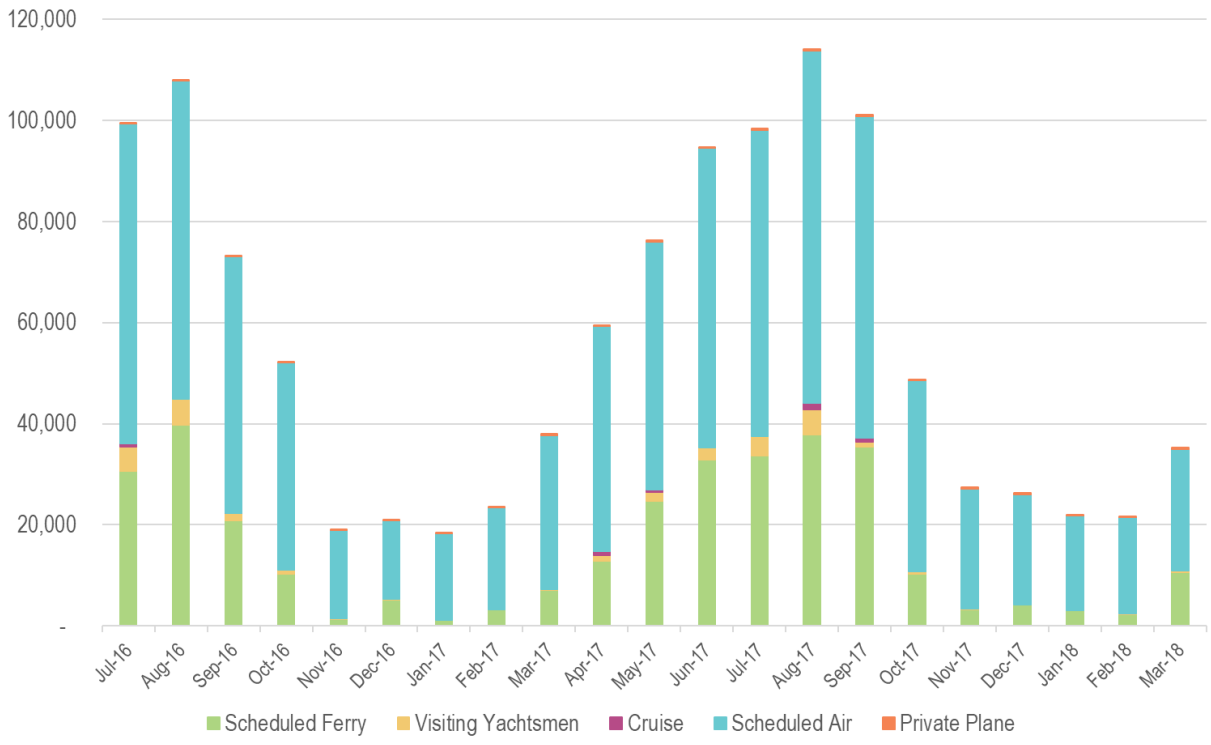
		Mar-18		Jan 18-Mar 18			Year-to-date			Rolling 12 months					
		Visits	Nights	Visits	Nights	Nights per Visit	Visits	Nights	Nights per Visit	Visits	Nights	Nights per Visit	Visits Trend	Nights Trend	
Headlines	Total Market	35,292	116,299	79,037	250,598		79,037	250,598		725,885	2,847,649				
	annual change	-7%	-26%	-1%	-22%		-1%	-22%							
	Overnight Visits	31,690		70,063		3.6	70,063		3.6	612,852		4.6			
	annual change	-11%		-6%			-6%								
Purpose of Visit	Holiday (Total)	17,660	57,877	30,863	101,136		30,863	101,136		498,745	1,961,298				
	annual change	-25%	-22%	-23%	-20%		-23%	-20%							
		Holiday (Day-Trippers)	1,228		1,759			1,759			81,054				
		annual change	196%		136%			136%							
		Holiday (Overnight Visits)	16,432	57,877	29,104	101,136	3.5	29,104	101,136	3.5	417,691	1,961,298	4.7		
		annual change	-29%	-22%	-26%	-20%		-26%	-20%						
		Business (Total)	5,695	12,075	21,289	40,378		21,289	40,378		81,910	236,312			
		annual change	-16%	-72%	15%	-45%		3%	-45%						
		Business (Day-Trippers)	1,493		5,880			5,880			20,453				
		annual change	33%		66%			66%							
		Business (Overnight Visits)	4,202	12,075	29,104	40,378	1.4	15,410	40,378	2.6	61,458	236,312	3.8		
		annual change	-26%	-72%	3%	-45%		3%	-45%						
		VFR (Total)	4,855	22,549	14,777	71,030		14,777	71,030		101,686	534,749			
		annual change	0%	-17%	-10%	-31%		-11%	-31%						
		VFR (Day-Trippers)	134		192			192			1,165				
		annual change			169%			169%							
	VFR (Overnight Visits)	4,721	22,549	14,585	71,030	4.9	14,585	71,030	4.9	100,521	534,749	5.3			
	annual change	-2%	-17%	-11%	-31%		-11%	-31%							
	Other, including Study (Total)	7,082	23,799	12,107	38,053		12,107	38,053		43,543	115,291				
	annual change	160%	76%	150%	112%		188%	112%							
	Other (Day-Trippers)	747		1,142			1,142			10,361					
	annual change	-21%		10%			10%								
	Other (Overnight Visits)	6,335	23,799	10,965	38,053	3.5	10,965	38,053	3.5	33,183	115,291	3.5			
	annual change	254%	76%	188%	112%		188%	112%							

		Mar-18		Jan 18-Mar 18			Year-to-date			Rolling 12 months				
		Visits	Nights	Visits	Nights	Nights per Visit	Visits	Nights	Nights per Visit	Visits	Nights	Nights per Visit	Visits Trend	Nights Trend
UK		21,440	80,727	55,882	189,985		55,882	189,985		472,240	2,191,240			
	annual change	-19%	-29%	-5%	-20%		-5%	-20%						
France		8,582	23,183	10,981	30,298		10,981	30,298		134,354	170,676			
	annual change	62%	42%	29%	18%		29%	18%						
Germany		339	1,710	465	2,110		465	2,110		20,364	104,889			
	annual change	-41%	-2%	-31%	-24%		-31%	-24%						
Guernsey		3,206	3,693	7,430	8,819		7,430	8,819		38,771	68,050			
	annual change	-1%	-25%	10%	-7%		10%	-7%						
Ireland		150	614	516	2,760		516	2,760		8,452	39,975			
	annual change	1401%	6041%	-29%	-54%		-29%	-54%						
Scheduled Ferry		10,668	30,104	16,123	54,333		16,123	54,333		211,284	565,432			
	annual change	49%	32%	40%	35%		40%	35%						
Visiting Yachtsmen		210	338	247	386		247	386		16,278	39,896			
	annual change	18%	36%	-6%	11%		-6%	11%						
Cruise		-	-	-	-		-	-		3,283	-			
	annual change													
Scheduled Air		24,046	85,488	61,926	195,138		61,926	195,138		491,962	2,239,242			
	annual change	-21%	-36%	-8%	-30%		-8%	-30%						
Private Plane		369	369	741	741		741	741		3,079	3,079			
	annual change	55%	55%	32%	32%		32%	32%						
Day Visit		3,602	-	8,973	-		8,973	-		113,033	-			
	annual change	43%		66%			66%							
1-3 nights		16,113	36,888	40,335	86,405		40,335	86,405		252,725	566,389			
	annual change	-27%	-27%	-13%	-15%		-13%	-15%						
4-6 nights		12,639	52,928	22,826	95,901		22,826	95,901		208,395	941,450			
	annual change	29%	29%	15%	10%		15%	10%						
7 nights		1,772	12,199	3,203	22,007		3,203	22,007		105,489	722,737			
	annual change	-14%	-14%	-4%	-5%		-4%	-5%						
8+ nights		1,165	14,284	3,700	46,285		3,700	46,285		46,244	616,441			
	annual change	-29%	-72%	-27%	-57%		-27%	-57%						

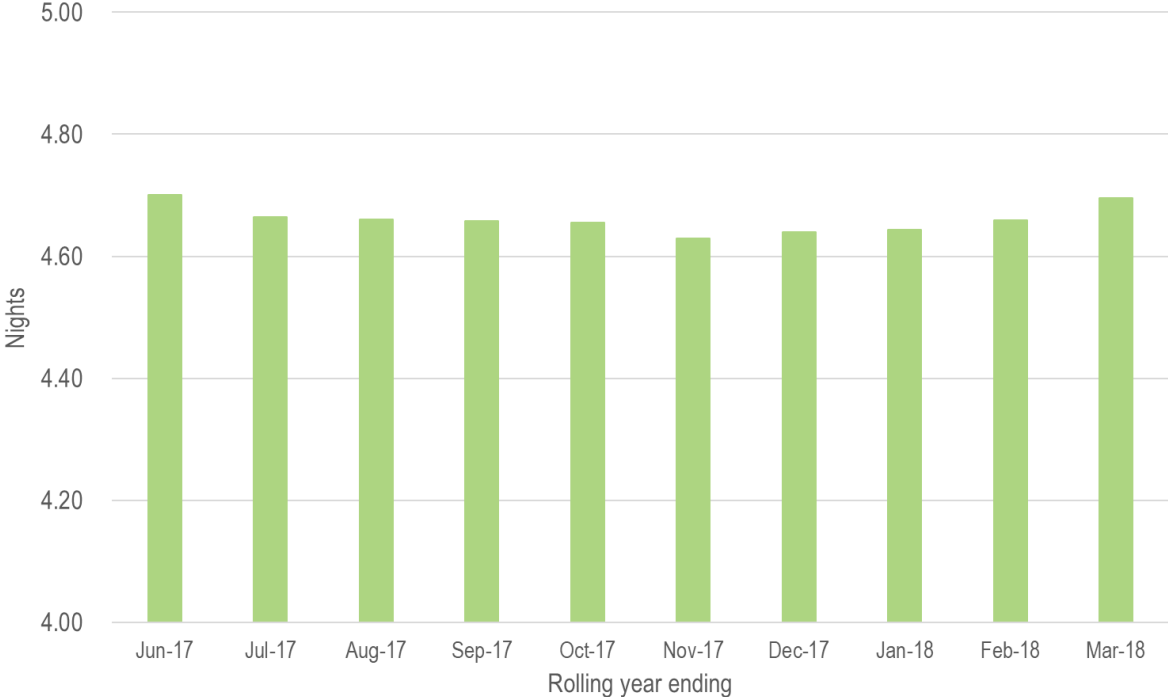
Visits by Duration of Stay



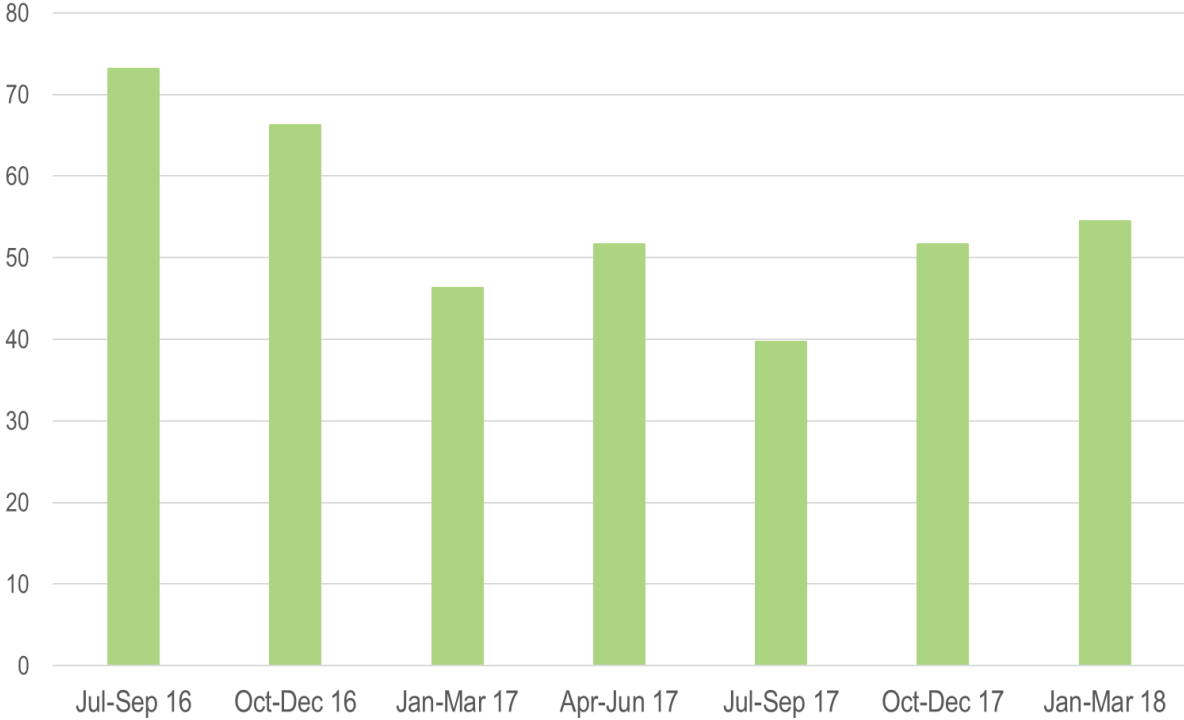
Visits by Mode of Travel



Average length of stay for Overnight Holiday Visits



Net Promoter Score among Holiday Visitors



First or Repeat Visit

