

## Exit Survey Analysis – January to September 2017

Provisional estimates suggest that the number of visits to Jersey during the first nine months of 2017 was 623,200 with visitor nights reaching 2.5 million. Across the period January to September visitors are estimated to have spent £212m (4% up on same period last year) in Jersey, boosting businesses across a host of economic sectors. The total number of visits for the nine months was positive at 4% up on last year and Staying Leisure Visitor numbers continue to grow, now up 17% on January-September 2016. In addition to the increase in the number of Holiday trips, visitor numbers were higher than a year ago thanks to a stronger performance from the Cruise Ship and Business visits segments.

The day visits segment still lags; 24% behind the same January-September period 2016.

During the period nearly seven-in-ten visits (69%) were made by Holiday visitors, 9% were visiting for Business reasons and 14% to spend time with friends and relatives.

Most visitors (64%) were residents of the UK, making this by far Jersey's largest source market. One-in-five visitors were from France while 5% were residents of Guernsey. Differences in the average length of stay by market means that the UK accounted for 77% of all visitor nights in Jersey during the first nine months of 2017, whereas France accounted for 6%.

One-in-six visits are day trips. Among trips that last at least one night the average length of stay was 4.8 nights. Around 15% of visits thus far this year have been seven-night stays. Across all trip purposes 45% of visitors were making their first visit to Jersey, but when looking just at Holiday visitors this proportion increases to 53%.

Looking at September, there were an estimated 100,900 visits to Jersey, generating 400,000 visitor nights on the island. There were more visitors departing by air (63%) than by sea (37%).

During the core three-month period of July to September it is estimated that the volume of visits was 12% higher than a year ago, with visitor nights increasing by a more modest 3%. Visitor expenditure in July to September is estimated to have reached £119m, 17% higher than the equivalent period of 2016.

These figures come with a note of caution. September's figures are influenced by a 'calendar effect'. There were five Saturdays in September this year but only four in September 2016. Although it will have less of an impact, October's figures will be impacted by the fact that October 2017 had four Saturdays whereas October 2016 had five Saturdays. Also the Super League Triathlon took place in Jersey on 23<sup>rd</sup> and 24<sup>th</sup> September, generating additional visitation from those participating in, delivering, and spectating at the event.

	Jan-Sep 2017	Jan-Sep 2016	change
Proxy for old Staying Leisure Visits Measure	359,295	306,704	17%
Proxy for old Staying Business Visits Measure	46,053	46,162	0%
Proxy for all other types of visits	218,067	243,805	-11%
Of which:			
'Day Visits'	98,923	129,722	-24%
'Staying Visits'	119,144	114,083	4%
<b>Total Visits - All Trips</b>	<b>623,415</b>	<b>596,671</b>	<b>4%</b>
<b>Total Spend - All Trips (£m)</b>	<b>£ 211.97</b>	<b>£ 202.98</b>	<b>4%</b>

The following summary table presents key data from the Exit Survey. There then follows a series of charts that illustrate visits by month since the commencement of the Exit Survey, with splits by journey purpose, country of residence, duration of stay, mode of travel and whether the visitor is making his or her first visit to the island.

		Month of September 2017	3 months to September 2017	January to September 2017	Rolling 12 Months
Headline Data	Total Visits	100,912	313,227	623,415	715,795
	annual change	38%	12%		
	Total Visitor Nights	400,003	1,326,415	2,515,970	2,967,138
	annual change	24%	3%		
Nights per visit (all)	4.0	4.2	4.0	4.1	
Nights per visit (overnighters)	4.9	5.2	4.8	4.9	
Trip Purpose	Visiting Yachtsmen	1,017	9,819	15,548	16,630
	annual change	-27%	-13%		
	Cruise	738	2,089	3,278	3,278
	annual change	779%	185%		
	Holiday	77,302	236,433	436,391	482,751
	annual change	42%	15%		
	Business	9,328	21,238	56,911	73,184
annual change	55%	23%			
Visiting Friends & Relatives	9,809	33,964	81,867	99,470	
annual change	18%	-1%			
Other	2,717	9,684	29,419	40,481	
annual change	-8%	-13%			
Country of Residence	UK	63,348	196,536	399,841	465,113
	annual change	30%	10%		
	France	22,597	68,890	122,353	134,477
	annual change	104%	50%		
	Germany	4,206	12,003	19,620	21,044
	annual change	16%	-31%		
Guernsey	3,616	11,512	31,432	38,633	
annual change	30%	0%			
Other / Not known	6,227	20,561	42,615	47,786	
annual change	-1%	-16%			
Mode	Sea (inc Cruise & Yachtsmen)	37,198	118,926	207,984	226,349
	annual change	66%	15%		
Air (inc Private Plane)	63,714	194,301	415,431	489,446	
annual change	25%	10%			
Duration of Stay	Day Visit	19,840	57,326	98,923	110,839
	annual change	78%	3%		
	1-3 nights	27,560	81,026	210,760	252,865
	annual change	20%	13%		
	4-6 nights	28,548	84,133	175,184	200,637
	annual change	49%	21%		
7 nights	17,957	63,407	96,449	103,418	
annual change	35%	32%			
8+ nights	7,007	27,334	42,100	48,036	
annual change	7%	-24%			

