

Exit Survey Analysis – January to August 2017

Provisional estimates suggest that the number of visits to Jersey during the first eight months of 2017 was 521,200 with visitor nights reaching 2.1 million. On-island expenditure is estimated on a quarterly basis, and during the period January to June it stood at £94.5m.

During the period January to August 2017, just more than two-thirds of visits (68%) 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. Very nearly one-in-five visitors were from France during the first eight months of the year while 5% were residents of Guernsey.

Around one-in-seven visits are day trips, while among trips that last at least one night the average length of stay was 4.8 nights. Around 15% of visits so far this year have been seven-night stays.

Across all trip purposes during the first eight months of 2017 44% of visitors were making their first visit to Jersey, but when looking just at Holiday visitors this proportion increases to 52%.

Looking just at August, there were an estimated 112,800 visits to Jersey, generating 489,000 visitor nights on the island. Mirroring the picture across each of the past three months, 38% of visitors left the island by sea and 62% by air.

Although it is necessary to be very cautious about comparing just a single month with that month the year before, we are now able to do this, and this reveals that both the number of visits and visitor nights in August of this year was 4% higher than in August 2016. This increase is in part thanks to Cruise Ship visits but there was also growth in the numbers saying that their trip purpose was Holiday.

The impact of the loss of AirBerlin routes continues to result in there being fewer German visitors than was the case last summer, with the reduction in visits from Guernsey also still evident. More encouragingly it would appear that visits from both the UK and France enjoyed a strong August.

The following table attempts to create a set of proxy variables for the 'old' definitions in order to facilitate year-on-year comparisons, but this comes with a hefty health warning.

	Jan-Aug 2017	Jan-Aug 2016	change
Proxy for old Staying Leisure Visits Measure	297,153	261,703	14%
Proxy for old Staying Business Visits Measure	40,184	41,683	-4%
Proxy for all other types of visits	182,919	220,033	-17%
Total Visits - All Trips	520,256	523,419	-1%

The following summary table presents key data from the Exit Survey, but it is recommended to focus more on the data for the rolling three, and twelve months, periods rather than that for a single month, as this can be influenced by comparatively low sample sizes.

From next month it will be possible to look at the three-month year-on-year changes on a like-for-like basis.

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 and mode of travel.

		Month of August 2017	3 months to August 2017	January to August 2017	Rolling 12 Months
Headline Data	Total Visits	112,765	305,742	521,243	686,875
	annual change	4%			
	Total Visitor Nights	489,115	1,253,581	2,114,232	2,888,371
	annual change	4%			
	Nights per visit (all)	4.3	4.1	4.1	4.2
	Nights per visit (overnighters)	5.2	5.1	4.8	4.9
Trip Purpose	Visiting Yachtsmen	4,957	11,251	14,531	16,999
	annual change	-3%			
	Cruise	1,351	1,351	2,540	2,624
	annual change	Zero last August			
	Holiday	84,358	218,318	353,669	453,691
	annual change	6%			
	Business	4,532	19,659	48,721	71,306
annual change	0%				
	Visiting Friends & Relatives	13,821	39,851	74,275	100,556
	annual change	-11%			
	Other	3,747	15,312	27,507	41,699
	annual change	31%			
Country of Residence	UK	71,758	188,224	335,600	449,450
	annual change	11%			
	France	25,580	67,358	99,074	122,275
	annual change	39%			
	Germany	4,058	10,346	15,454	20,509
	annual change	-50%			
	Guernsey	3,253	13,190	27,867	37,861
	annual change	-18%			
	Other / Not known	6,437	22,749	36,571	48,019
	annual change	-45%			
Mode	Sea (inc Cruise & Yachtsmen)	43,132	116,199	169,924	210,657
	annual change	-4%			
	Air	69,633	189,543	351,318	476,217
	annual change	10%			
Duration of Stay	Day Visit	19,464	59,064	78,567	101,631
	annual change	-23%			
	1-3 nights	28,543	83,053	182,891	248,031
	annual change	14%			
	4-6 nights	29,898	81,315	146,399	191,034
	annual change	11%			
	7 nights	23,424	59,241	78,293	98,602
	annual change	29%			
	8+ nights	11,437	23,068	35,092	47,577
	annual change	-8%			



