

## Exit Survey Analysis – January to May 2017

Provisional estimates suggest that the number of visits to Jersey during the first five months of 2017 was 213,200.

During the period January to May 2017, nearly two-thirds of visits (63%) were made by Holiday visitors, 14% were visiting for Business reasons and 16% to spend time with friends and relatives. Most visitors (70%) were residents of the UK, making this by far Jersey's largest source market. One-in-seven visitors were from France during the first five months of the year while 7% were residents of Guernsey.

On average visits to Jersey during the first five months of the year lasted four nights.

Looking just at May, there were an estimated 75,500 visits to Jersey, generating almost 293,000 visitor nights on the island. It would appear to have been a better month than was April for Business visits, explained by April having been when Easter fell this year. The number of day-trip visits is estimated to have reached almost 11,000 during the month, helping to explain a boost in the number of visits from France.

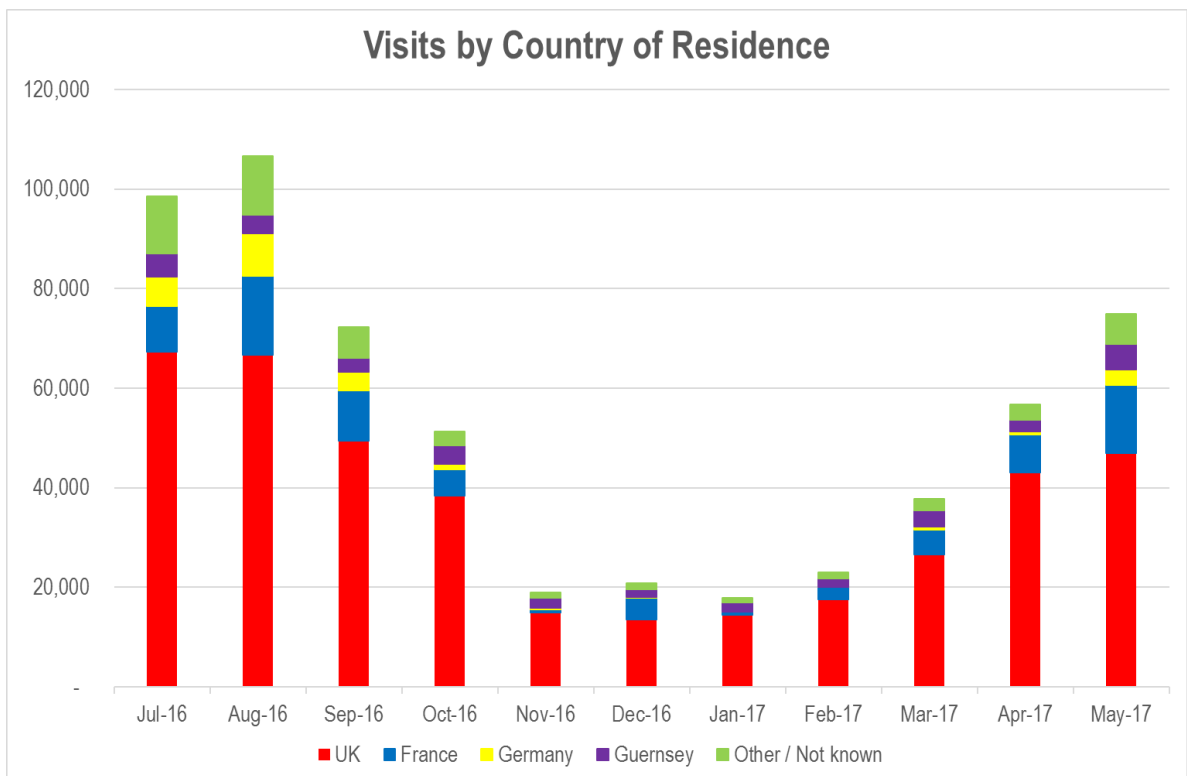
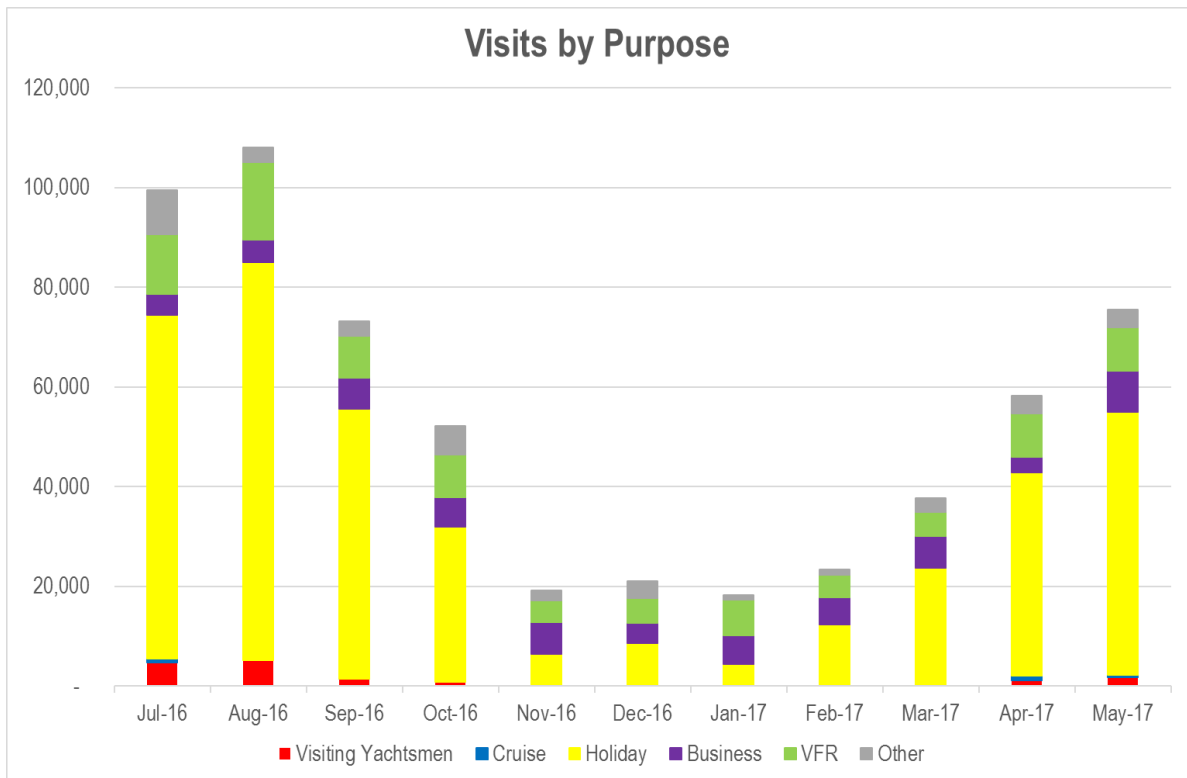
Across all trip purposes during the first five months of 2017 41% of visitors were making their first visit to Jersey, but when looking just at Holiday visitors this proportion increases to 51%.

We do not have a meaningful set of comparable data for the January to May period of 2016. However, if we look at Exit Survey results for those who cited a type of accommodation that would likely have fallen under the 'registered' category, we can endeavour to create approximations of the old metrics, and this is presented in the following table.

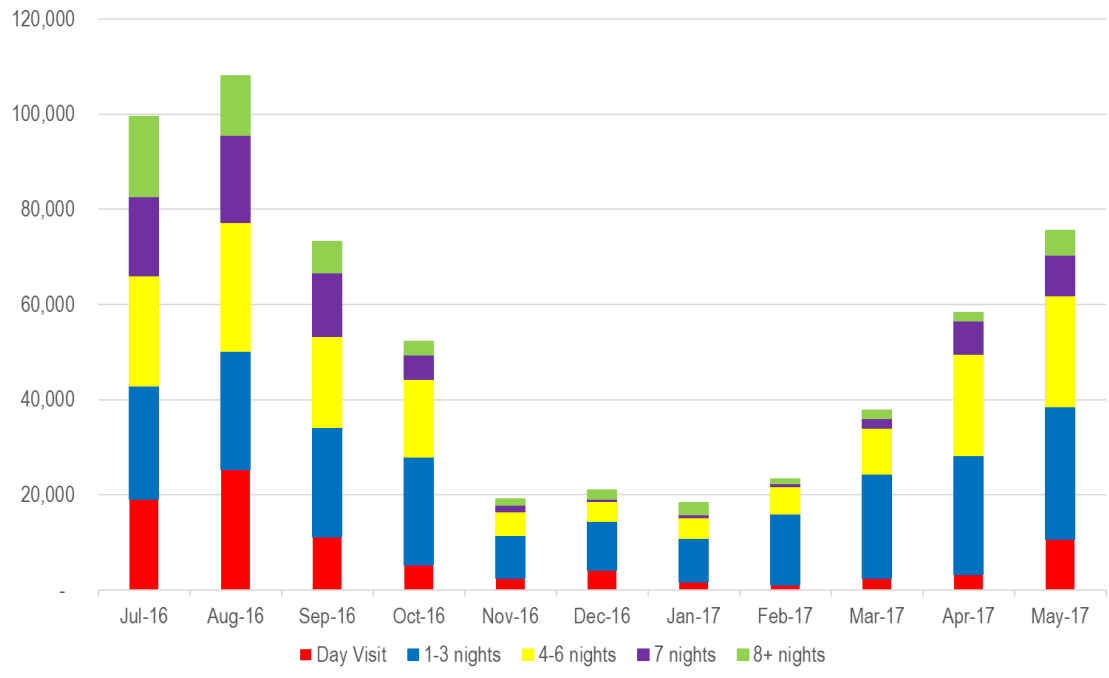
	Jan-May 2017	Jan-May 2016	change
Proxy for old Staying Leisure Visits Measure	124,600	107,700	16%
Proxy for old Staying Business Visits Measure	24,600	27,700	-11%
Estimate for all other types of visits	64,000	84,300	-24%
Total	213,200	219,700	-3%

The following charts 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.

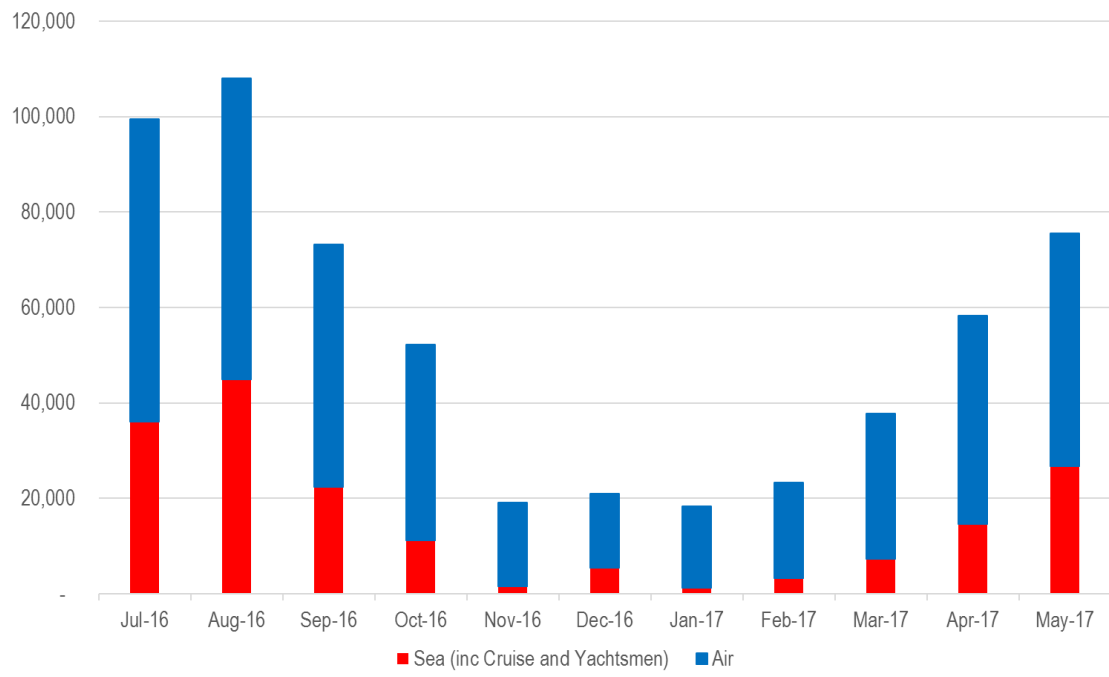
These charts are followed with a series of tables that show trends over time, along with a 'year-to-date' picture for a number of key metrics.



### Visits by Duration of Stay



### Visits by Mode of Travel



### Visits and Visitor Nights by month

	Total Visits	Total Visitor Nights	Nights per visit	Flag
Jul-16	99,514			Final
Aug-16	108,005			Final
Sep-16	73,252			Final
Oct-16	52,250			Final
Nov-16	19,133			Final
Dec-16	20,997			Final
Jan-17	18,285	84,519	4.6	Provisional
Feb-17	23,385	78,693	3.4	Provisional
Mar-17	37,728	157,028	4.2	Provisional
Apr-17	58,301	241,024	4.1	Provisional
May-17	75,531	292,807	3.9	Provisional

### Cumulative Visits, Visitor Nights and Nights per Visit

	Total Visits	Total Visitor Nights	Nights per Visit
Jan-17	18,285	84,519	4.6
Feb-17	41,669	163,212	3.9
Mar-17	79,398	320,240	4.0
Apr-17	137,699	561,264	4.1
May-17	213,230	854,071	4.0

### Visitor Spend by quarter

	Spend (£m)
Jul-Sep 16	£102.00
Oct-Dec 16	£25.30
Jan-Mar 17	£17.70

### Net Promoter Score by quarter

	Net Promoter Score
Jul-Sep 16	68.6
Oct-Dec 16	63.5
Jan-Mar 17	62.2

### Visits by month by purpose

	Visiting					
	Yachtsmen	Cruise	Holiday	Business	VFR	Other
Jul-16	4,775	650	68,946	4,314	11,989	8,840
Aug-16	5,127		79,924	4,521	15,563	2,871
Sep-16	1,386	84	54,148	6,147	8,484	3,004
Oct-16	841		31,075	5,960	8,525	5,849
Nov-16	143		6,234	6,444	4,291	2,021
Dec-16	98		8,565	4,033	4,982	3,319
Jan-17	48		4,417	5,675	7,122	1,023
Feb-17	35		12,244	5,461	4,532	1,113
Mar-17	177		23,490	6,392	4,911	2,759
Apr-17	1,187	836	40,821	3,047	8,843	3,567
May-17	1,833	353	52,833	8,256	8,655	3,601

### Visits by month by purpose - within month splits

	Visiting					
	Yachtsmen	Cruise	Holiday	Business	VFR	Other
Jul-16	5%	1%	69%	4%	12%	9%
Aug-16	5%	0%	74%	4%	14%	3%
Sep-16	2%	0%	74%	8%	12%	4%
Oct-16	2%	0%	59%	11%	16%	11%
Nov-16	1%	0%	33%	34%	22%	11%
Dec-16	0%	0%	41%	19%	24%	16%
Jan-17	0%	0%	24%	31%	39%	6%
Feb-17	0%	0%	52%	23%	19%	5%
Mar-17	0%	0%	62%	17%	13%	7%
Apr-17	2%	1%	70%	5%	15%	6%
May-17	2%	0%	70%	11%	11%	5%

### Cumulative visits year-to-date 2017 by purpose

	Visiting					
	Yachtsmen	Cruise	Holiday	Business	VFR	Other
Jan-17	48		4,417	5,675	7,122	1,023
Feb-17	83		16,661	11,136	11,653	2,136
Mar-17	260		40,151	17,528	16,564	4,894
Apr-17	1,447	836	80,972	20,575	25,408	8,462
May-17	3,280	1,189	133,805	28,830	34,063	12,062

### Cumulative visits year-to-date (share of total) by purpose

	Visiting					
	Yachtsmen	Cruise	Holiday	Business	VFR	Other
Jan-17	0%	0%	24%	31%	39%	6%
Feb-17	0%	0%	40%	27%	28%	5%
Mar-17	0%	0%	51%	22%	21%	6%
Apr-17	1%	1%	59%	15%	18%	6%
May-17	2%	1%	63%	14%	16%	6%

### Visits by month by country of residence

	Country of residence					Other / Not known
	UK	France	Germany	Guernsey		
Jul-16	67,317	9,179	5,943	4,635		11,418
Aug-16	66,631	15,867	8,572	3,708		11,897
Sep-16	49,362	10,195	3,730	2,720		6,316
Oct-16	38,459	5,274	1,031	3,687		2,779
Nov-16	14,889	689	335	1,951		1,184
Dec-16	13,497	4,451	83	1,614		1,242
Jan-17	14,497	586	63	1,767		1,012
Feb-17	17,554	2,535	34	1,714		1,196
Mar-17	26,572	5,024	578	3,229		2,324
Apr-17	43,002	7,752	560	2,353		3,092
May-17	46,879	13,710	3,110	5,244		6,020

### Visits by month by country of residence - within month splits

	Country of residence					Other / Not known
	UK	France	Germany	Guernsey		
Jul-16	68%	9%	6%	5%		11%
Aug-16	62%	15%	8%	3%		11%
Sep-16	67%	14%	5%	4%		9%
Oct-16	74%	10%	2%	7%		5%
Nov-16	78%	4%	2%	10%		6%
Dec-16	64%	21%	0%	8%		6%
Jan-17	79%	3%	0%	10%		6%
Feb-17	75%	11%	0%	7%		5%
Mar-17	70%	13%	2%	9%		6%
Apr-17	74%	13%	1%	4%		5%
May-17	62%	18%	4%	7%		8%

### Cumulative visits year-to-date 2017 by country of residence

	UK	France	Germany	Guernsey	Other / Not known
Jan-17	14,497	586	63	1,767	1,012
Feb-17	32,050	3,121	97	3,481	2,208
Mar-17	58,623	8,146	675	6,710	4,533
Apr-17	101,625	15,897	1,235	9,062	7,624
May-17	148,504	29,608	4,345	14,306	13,645

### Cumulative visits ytd (share of total) by country of residence

	UK	France	Germany	Guernsey	Other / Not known
Jan-17	79%	3%	0%	10%	6%
Feb-17	77%	7%	0%	8%	5%
Mar-17	74%	10%	1%	8%	6%
Apr-17	74%	12%	1%	7%	6%
May-17	70%	14%	2%	7%	6%

### Visits by month by mode

	Sea (inc Cruise and Yachtsmen)	Air
Jul-16	36,123	63,391
Aug-16	44,891	63,114
Sep-16	22,398	50,854
Oct-16	11,187	41,063
Nov-16	1,542	17,591
Dec-16	5,374	15,623
Jan-17	1,193	17,092
Feb-17	3,298	20,087
Mar-17	7,326	30,403
Apr-17	14,606	43,695
May-17	26,755	48,776

### Visits by month by mode

	Sea (inc Cruise and Yachtsmen)	Air
Jul-16	36%	64%
Aug-16	42%	58%
Sep-16	31%	69%
Oct-16	21%	79%
Nov-16	8%	92%
Dec-16	26%	74%
Jan-17	7%	93%
Feb-17	14%	86%
Mar-17	19%	81%
Apr-17	25%	75%
May-17	35%	65%

### Cumulative visits ytd 2017 by mode

	Sea (inc Cruise and Yachtsmen)	Air
Jan-17	1,193	17,092
Feb-17	4,490	37,179
Mar-17	11,816	67,582
Apr-17	26,422	111,277
May-17	53,177	160,053

### Cumulative visits ytd 2017 (share of total) by mode

	Sea (inc Cruise and Yachtsmen)	Air
Jan-17	7%	93%
Feb-17	11%	89%
Mar-17	15%	85%
Apr-17	19%	81%
May-17	25%	75%

### Visits by month by duration of stay

	Day Visit	1-3 nights	4-6 nights	7 nights	8+ nights
Jul-16	19,088	23,864	23,154	16,559	16,848
Aug-16	25,286	25,000	27,047	18,224	12,448
Sep-16	11,148	23,034	19,181	13,340	6,549
Oct-16	5,311	22,704	16,333	5,028	2,875
Nov-16	2,438	9,034	4,944	1,465	1,251
Dec-16	4,167	10,368	4,177	476	1,809
Jan-17	1,697	9,251	4,304	579	2,453
Feb-17	1,157	14,874	5,706	703	944
Mar-17	2,505	21,840	9,701	2,040	1,642
Apr-17	3,198	25,107	21,342	6,906	1,747
May-17	10,777	27,766	23,275	8,585	5,127

### Visits by month by duration of stay - within month splits

	Day Visit	1-3 nights	4-6 nights	7 nights	8+ nights
Jul-16	19%	24%	23%	17%	17%
Aug-16	23%	23%	25%	17%	12%
Sep-16	15%	31%	26%	18%	9%
Oct-16	10%	43%	31%	10%	6%
Nov-16	13%	47%	26%	8%	7%
Dec-16	20%	49%	20%	2%	9%
Jan-17	9%	51%	24%	3%	13%
Feb-17	5%	64%	24%	3%	4%
Mar-17	7%	58%	26%	5%	4%
Apr-17	5%	43%	37%	12%	3%
May-17	14%	37%	31%	11%	7%

### Cumulative visits year-to-date 2017 by duration of stay

	Day Visit	1-3 nights	4-6 nights	7 nights	8+ nights
Jan-17	1,697	9,251	4,304	579	2,453
Feb-17	2,854	24,125	10,010	1,281	3,398
Mar-17	5,359	45,965	19,711	3,322	5,040
Apr-17	8,557	71,073	41,054	10,228	6,787
May-17	19,334	98,839	64,329	18,813	11,914



**Cumulative visits ytd 2017 (share of total) by duration of stay**

	Day Visit	1-3 nights	4-6 nights	7 nights	8+ nights
Jan-17	9%	51%	24%	3%	13%
Feb-17	7%	58%	24%	3%	8%
Mar-17	7%	58%	25%	4%	6%
Apr-17	6%	52%	30%	7%	5%
May-17	9%	46%	30%	9%	6%