

## Exit Survey Analysis

Seasonal factors can play an important role in shaping tourism performance in the short-term, and the exceptionally early Easter in 2018 has acted as something of a headwind for Jersey's visitor economy.

Nevertheless, provisional data from the Exit Survey indicates that in the first quarter of this year visitors to the island spent more than £21m, up by around £3m compared with the same period of last year.

Although based on a comparatively small sample, it is also encouraging to note that in the first three months of 2018 the island achieved a Net Promoter Score among its Holiday visitors of 54 – up from 46 at the same time of year in 2017.

Overall passenger numbers arriving in the island across the first five months (January to May) show a 0.5% increase. These figures include both returning residents as well as arriving visitors, and Exit Survey data indicates that between January and May the number of visitors to Jersey was marginally lower, by 1%, than for the same period of last year. The early Easter (compared with last year) helps to explain this small reduction, as traditionally consumers are more likely to use Easter to go away for a few days when it falls slightly later in the spring.

In 2017 travel by school groups both within France, and to other destinations from France, was sharply lower than in previous years due to concerns around terrorism, but it is evident that there has been a strong bounce-back by this segment in 2018, with a more than 40% jump in French visitors to Jersey between January and May.

This growth helps to account for the significant increase in day-trip visits to Jersey in the early months of this year, with a further boost to this market being the absence of fog disruption impacting on Business day-trip visits to the same extent as it did in early 2017.

During the period January to May the average duration of a Holiday visit to Jersey (that lasted at least one night) stood at 3.9 nights, down slightly on the 4.1 for the same period of 2017. This, combined with lower length of stay in other journey purpose categories, and an overall decline in overnight visits, means that the estimated volume of visitor nights in Jersey during January to May is 20% lower than for the same period of last year, but to put this in context, less than 30% of all visitor nights in Jersey were accounted for by the January to May period last year.

The counter to a strong showing for day-trip visits when overall visitor volumes are flat is that the number of visits seeing at least one night spent in Jersey is 10% lower than for the equivalent months of 2017.

There has been a 13% drop in the number of Holidays to Jersey in the first five months of 2018, whereas Business visits are estimated at 7% more than for the same period of last year.

By mode of travel Scheduled Ferry is seeing strong year-on-year growth, up around 15,000, whereas the estimated number of visits that are by Scheduled Air is around 20,000 fewer than in the first five months of last year, with travel by islanders accounting for a somewhat higher share of air travel.

It is too early in the year to see the impact of increased connectivity from Germany with volumes close to the 5,000 or so visits seen during the January to May period of 2017.

Across all trip purposes 40% of visits to Jersey between January and May were by those encountering the island for the first time, fractionally lower than the 42% when looking at the same months of last year. Focussing just on Holiday visits, the proportion of visits by first-time visitors during the first five months of this year stood at 50.7%, almost identical to the figure for the same period of last year.

Ratings of different aspects of visitor's experience in Jersey remain steady, with the highest performing areas being 'Beaches and Countryside', 'Cleanliness' and 'Safety and Security'.

The table overleaf presents a range of headline metrics – it is recommended to focus more on the rolling three month and year-to-date estimates than those for a single month. Once June data is available annual change data for the rolling twelve month period will be included, and will make for a more reliable indicator of the direction of travel.

		May-18		Mar 18-May 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	75,494	249,053	169,279	544,728		213,042	687,244		724,005	2,743,559			
	annual change	-1%	-16%	-3%	-22%		-1%	-20%						
	Overnight Visits	58,396		137,450		4.0	175,840		3.9	596,821		4.6		
annual change	-11%		-13%			-10%								
Purpose of Visit	Holiday (Total)	55,270	180,470	108,360	358,194		122,174	405,306		490,221	1,861,402			
	annual change	-1%	-22%	-12%	-25%		-13%	-24%						
	Holiday (Day-Trippers)	13,119		18,322			18,875			87,504				
	annual change	74%		65%			65%							
	Holiday (Overnight Visits)	42,151	180,470	90,038	358,194	4.0	103,299	405,306	3.9	402,716	1,861,402	4.6		
	annual change	-13%	-22%	-20%	-25%		-20%	-24%						
	Business (Total)	6,367	17,256	16,594	41,186		32,605	72,265		81,335	229,023			
	annual change	-26%	-23%	-11%	-50%		7%	-36%						
	Business (Day-Trippers)	2,125		4,684			9,155			22,477				
	annual change	88%		98%			91%							
	Business (Overnight Visits)	4,242	17,256	90,038	41,186	0.5	23,450	72,265	3.1	58,858	229,023	3.9		
	annual change	-43%	-23%	-27%	-50%		-8%	-36%						
	VFR (Total)	6,584	29,200	19,849	90,419		30,285	143,583		100,055	528,082			
	annual change	-22%	-27%	-10%	-15%		-10%	-21%						
	VFR (Day-Trippers)	259		449			510			1,484				
annual change			882%			615%								
VFR (Overnight Visits)	6,325	29,200	19,401	90,419	4.7	29,775	143,583	4.8	98,571	528,082	5.4			
annual change	-25%	-27%	-12%	-15%		-11%	-21%							
Other, including Study (Total)	7,273	22,127	24,476	54,929		27,979	66,090		52,394	125,053				
annual change	106%	345%	151%	73%		136%	82%							
Other (Day-Trippers)	1,595		8,373			8,662			15,719					
annual change	-26%		170%			171%								
Other (Overnight Visits)	5,678	22,127	16,102	54,929	3.4	19,317	66,090	3.4	36,675	125,053	3.4			
annual change	317%	345%	142%	73%		123%	82%							

		May-18		Mar 18-May 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
Country of Residence	UK	40,836	173,778	99,479	399,366		133,936	515,165		461,920	2,134,225			
	annual change	-10%	-14%	-13%	-20%		-9%	-17%						
	France	20,420	28,450	42,692	64,327		45,091	72,044		145,727	186,240			
	annual change	42%	133%	52%	51%		44%	39%						
	Germany	3,518	14,749	4,270	18,749		4,396	19,168		19,943	99,651			
	annual change	0%	-20%	-13%	-22%		-13%	-24%						
Guernsey	5,259	5,191	12,700	12,631		16,926	18,048		40,452	60,910				
annual change	0%	-48%	15%	-41%		16%	-30%							
Ireland	446	2,516	1,287	7,145		1,653	9,414		7,538	37,761				
annual change	-19%	1%	-38%	-20%		-41%	-37%							
Mode of Departure	Scheduled Ferry	32,009	72,721	60,368	135,152		65,825	161,141		223,457	564,326			
	annual change	30%	-2%	35%	3%		34%	9%						
	Visiting Yachtsmen	2,416	5,389	3,525	7,386		3,562	7,435		16,581	40,215			
	annual change	32%	38%	11%	6%		9%	5%						
	Cruise	1,175	-	1,175	-		1,175	-		3,264	-			
annual change	233%		-2%			-2%								
Scheduled Air	39,315	170,363	102,836	400,814		140,732	516,920		477,032	2,135,346				
annual change	-20%	-22%	-17%	-28%		-13%	-27%							
Private Plane	579	579	1,376	1,376		1,748	1,748		3,672	3,672				
annual change	138%	138%	111%	111%		79%	79%							
Duration of Stay	Day Visit	17,098	-	31,829	-		37,202	-		127,184	-			
	annual change	58%		92%			91%							
	1-3 nights	24,734	56,862	70,082	164,406		94,314	216,675		252,969	568,130			
	annual change	-12%	-17%	-7%	-8%		-6%	-6%						
	4-6 nights	20,943	94,664	46,110	206,042		56,301	251,535		196,525	895,876			
annual change	-11%	-11%	-16%	-15%		-14%	-13%							
7 nights	10,027	68,627	15,379	106,570		16,811	116,828		103,358	709,020				
annual change	15%	14%	-14%	-13%		-12%	-11%							
8+ nights	2,692	28,900	5,879	67,709		8,415	102,205		43,970	569,900				
annual change	-48%	-53%	-32%	-56%		-30%	-51%							