Jersey Destination Plan Refresh
Survey findings

David Edwards
November 2018
About the survey

- Around 20 minute online survey
- Promoted across all VJ business channels
- Gained 79 responses
**Who took part?**

<table>
<thead>
<tr>
<th>Group</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>A resident</td>
<td>34%</td>
</tr>
<tr>
<td>Attraction/Gallery</td>
<td>21%</td>
</tr>
<tr>
<td>Brand &amp; Concept development for destinations</td>
<td>8%</td>
</tr>
<tr>
<td>Charity supplying equipment to visitors.</td>
<td>5%</td>
</tr>
<tr>
<td>General Public</td>
<td>7%</td>
</tr>
<tr>
<td>General public</td>
<td></td>
</tr>
<tr>
<td>Heritage Organisation</td>
<td></td>
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<tr>
<td>InstaTraveler</td>
<td></td>
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<tr>
<td>Jewellers</td>
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<tr>
<td>Local with keen interest in boosting tourism.</td>
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<tr>
<td>Marketing company</td>
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<tr>
<td>Medical industry</td>
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<tr>
<td>Planning Consultant</td>
<td></td>
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<tr>
<td>Promoting Jersey has a great destination</td>
<td></td>
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<tr>
<td>Promoting Jersey’s Inner History</td>
<td></td>
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<tr>
<td>Recruitment</td>
<td></td>
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<tr>
<td>Sport - rugby</td>
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<tr>
<td>States Member</td>
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<tr>
<td>Third sector</td>
<td></td>
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<tr>
<td>Tour Programme Manager and lead guide</td>
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<tr>
<td>Tourism education</td>
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<tr>
<td>UKInbound guide</td>
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<tr>
<td>hospitality consultant</td>
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</tbody>
</table>
Nature of business

- Visitor Attraction: 15%
- Activity provider: 8%
- Guide: 10%
- Retail: 8%
- Accommodation provider: 51%
- Food / Beverage venue: 31%
- Entertainment / cultural venue: 5%
Opinion on 1m visitors spending £500m ambition
Which markets offer scope to grow?

- Visits by residents of the UK
- Short-break leisure stays outside the main summer season
- Short-break leisure stays in the summer
- Visits by younger ‘couples’
- Visits by residents of France
- Visits by those who are retired
- Attending special events outside of the main summer
- Visits by residents of Germany, Austria and Switzerland
- Visits by families with younger children
- Week long leisure stays in the summer
- Visits by residents of the Republic of Ireland
- Island-hopping trips featuring the Channel Islands
- Visits by residents of Sweden, Norway and Denmark
- Conferences
- Attending special events during the summer
- Day-trip visits for leisure
- Visits by residents of 'long-haul' markets

Legend:
- No scope at all
- Not much scope
- Some scope
- A great deal of scope
- Don't know
Importance of promoting attributes

Jersey has beautiful beaches
It is safe
Jersey has a distinct identity
Jersey has beautiful countryside
It has a rich heritage
It is a good place to visit at any time of year
It offers a warm welcome
It is an easy destination to get to
It is a relaxing place to visit
It is a good place for families to visit
It is a good place for more mature visitors
There is lots to see and do
It is a fun place to visit
It is an exciting destination
It is a romantic place to visit
It is a stylish place to visit
Jersey offers value for money
There is a wide variety of accommodation

Not at all important | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | Extremely important | Don't know
Effectiveness of promoting attributes past 2 years

- Jersey has beautiful beaches
- Jersey has beautiful countryside
- It has a rich heritage
- Jersey has a distinct identity
- It is safe
- It is a good place for families to visit
- It is a relaxing place to visit
- It is a stylish place to visit
- It offers a warm welcome
- It is a good place to visit at any time of year
- It is a romantic place to visit
- It is an easy destination to get to
- It is a good place for more mature visitors
- There is a wide variety of accommodation
- Jersey offers value for money
- It is a fun place to visit
- There is lots to see and do
- It is an exciting destination
Whether used #theislandbreak

- Yes: 51%
- No: 47%
- Don't know: 2%
Effectiveness of #theislandbreak

- Not at all effective
- 2
- 3
- 4
- 5
- 6
- 7
- 8
- 9
- Extremely effective
Effectiveness of joint marketing past 2 years

- Not at all effective
- 2
- 3
- 4
- 5
- 6
- 7
- 8
- 9
- Extremely effective
Impact of marketing past 2 years

Helped your business attract new visitors

Helped your business retain visitors
Attitudes towards marketing past 2 years

- It has presented coastal, rural and urban areas fairly
- It has portrayed an authentic image of Jersey
- It has been bold
- It has had a sense of fun
- It has used the right channels

Legend:
- Totally disagree
- 2
- 3
- 4
- 5
- 6
- 7
- 8
- 9
- Totally agree
- Don't know
Should there be more promotion of “The Channel Islands”?
Ranking for where the focus should be

<table>
<thead>
<tr>
<th>Option</th>
</tr>
</thead>
<tbody>
<tr>
<td>Establish new air routes</td>
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<tr>
<td>Increase the number of air routes operating year-round</td>
</tr>
<tr>
<td>Establish new sea routes</td>
</tr>
<tr>
<td>Maintain the existing air route network</td>
</tr>
<tr>
<td>Maintain the existing sea route network</td>
</tr>
<tr>
<td>Increase the frequency of flights but not extend the season</td>
</tr>
</tbody>
</table>
Potential impact of better inter-island links

- The number of visits to Jersey for events (sporting, cultural etc)
- The number of 'island-hopping' trips visiting both Jersey and Guernsey
- The number of leisure day-trips to Jersey by residents of Guernsey
- The number of overnight leisure visits to Jersey by Guernsey residents
- The number of leisure day-trips to Jersey by those visiting Guernsey
- The number of business trips to Jersey

Legend:
- No difference
- 2
- 3
- 4
- 5
- 6
- 7
- 8
- 9
- A great deal of difference
- Don't know
Is there enough for visitors to do?

- In winter:
  - Not enough to see and do: 70%
  - About the right amount of things to see and do: 20%
  - More than enough to see and do: 10%

- In autumn:
  - Not enough to see and do: 50%
  - About the right amount of things to see and do: 40%
  - More than enough to see and do: 10%

- In spring:
  - Not enough to see and do: 70%
  - About the right amount of things to see and do: 30%

- In summer:
  - Not enough to see and do: 30%
  - About the right amount of things to see and do: 70%
Perceived product strengths and weaknesses

- The range of places to eat and drink
- The quality of the food and drink offering
- The quality of accommodation available
- On-island transportation
- The range of activities that visitors can do
- Digital know-how
- Provision of on-island visitor information
- The range of accommodation available
- Facilities for the disabled
- Customer service provided by Jersey businesses
- The number of visitor attractions
- Sunday trading laws
- Government policies
- The range of shops available
- Labour market skills
- Value for money
- Seasonal opening

Legend:
- **A definite weakness**
- 2
- 3
- 4
- 5
- 6
- 7
- 8
- 9
- A definite strength
- Don't know
Attitudes towards public realm

- There should be more ‘green spaces’
- There should be more al fresco dining
- There should be more street entertainment
- There should be more animation of public spaces (bunting etc)
- There should be more public art
- There should be more parking provision
- There should be improved signage

Legend:
- Totally disagree
- Agree 2
- Agree 3
- Agree 4
- Agree 5
- Agree 6
- Agree 7
- Agree 8
- Agree 9
- Totally agree
- Don’t know
Who has role in securing future talent?

- Government
- Businesses
- Visit Jersey
- Associations (eg Jersey Hospitality Association)
- Parents
- Schools/colleges

Legend:
- Totally disagree
- 2
- 3
- 4
- 5
- 6
- 7
- 8
- 9
- Totally agree
- Don't know
Effectiveness of securing future talent

- **Visit Jersey**
- **Businesses**
- **Associations (e.g., Jersey Hospitality Association)**
- **Government**
- **Parents**
- **Schools/Colleges**

Legend:
- Not at all effective
- 2
- 3
- 4
- 5
- 6
- 7
- 8
- 9
- Extremely effective
- Don't know
<table>
<thead>
<tr>
<th>Rank for what would best help deal with labour constraints</th>
</tr>
</thead>
<tbody>
<tr>
<td>Better trained staff</td>
</tr>
<tr>
<td>Changes to planning laws</td>
</tr>
<tr>
<td>Easier access to finance / loans / grants</td>
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<tr>
<td>A better understanding of technological solutions</td>
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