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1 Introduction
Aim of the research programme

How should Visit Jersey develop the island’s tourism infrastructure to deliver best in class experiences?

1. Which elements of the tourism offer should be addressed to provide Jersey with an advantage over its key competitors?

- How is Jersey currently perceived by visitors at the different touchpoints?
- How do they feel about it as a destination?
- How do visitors’ experiences in Jersey compare to other destinations in the British Isles?
- Do these experiences differ by visitor segments?
- How can Jersey gain competitive advantage and become more attractive as a destination?

2. How can Jersey deliver an enriching and memorable experience?

- What matters most to visitors when choosing a destination?
- Does Jersey meet visitor expectations?
- Are the experiences memorable or unique to Jersey?
- What triggers positive and negative emotions amongst visitors?
- How does this differ amongst the range of visitor segments?
- Which elements of the offer have the potential to convert visitors into advocates?

3. How can Jersey maximise loyalty among its current visitor base and encourage positive recommendations to deliver growth?

- Does Jersey’s tourism offer reflect current customers’ needs?
- How does it compare to other popular destinations amongst the target visitor segments?
- Which key needs are not currently being addressed?
- How can the existing offer be modified to attract new visitors?
- What are the quick wins versus medium to long term investments required to maintain and drive future visitor numbers?
Who we spoke to, where and when.....

Fieldwork dates
20th February 2017 – 30th September 2017

Interviews by month:
- Feb/March: 23
- Apr: 106
- May: 232
- Jun: 306
- Jul: 303
- Aug: 444
- Sep: 407

Interview locations
- St Brelades Bay
- St Ouens Bay
- Jersey War Tunnels
- Mont Orgueil Castle
- St Aubins Harbour
- Airport
- Durrell Wildlife Park
- Elizabeth Castle
- Gorey
- St Helier
  - Bus Terminus
  - Liberation Square
  - Marina
  - Maritime Museum
  - Tourist Information Centre
  - Waterfront

Is this your first visit to Jersey? (%)
- First time visitors: 51
- Repeat visitors: 49

Are there any children in your party? (%)
- Visiting Jersey with children: 14
- Visiting Jersey without children: 86

Is this visit to Jersey a… ? (%)
- Day trip: 3
- Weekend/Short break: 12
- Longer holiday: 85

How did you travel to Jersey? (%)
- Plane: 16
- Ferry: 83

Base: All respondents (1821)
Profile of first time visitors (%)

**Age**
- 11% (16-34)
- 31% (35-54)
- 58% (55+)

**Gender**
- Male: 63%
- Female: 36%

**SEG**
- AB: 46%
- C1: 17%
- C2: 6%
- DE: 30%

**Country**
- England: 86%
- Scotland: 7%
- Wales: 3%
- Northern Ireland: 2%
- Guernsey: 1%
- Republic of Ireland: 1%

**Disability**
- Yes: 19%
- No: 90%
- Refused: 1%

**Children in party travelling to Jersey**
- With children: 14%
- Without children: 86%

Base: First time visitors to Jersey (924)
Profile of repeat visitors (%)

Age
- 6: 16-34
- 25: 35-54
- 67: 55+

Gender
- Male: 63%
- Female: 37%

SEG
- AB: 45%
- C1: 15%
- C2: 8%
- DE: 25%

Country
- England: 81%
- Scotland: 8%
- Wales: 4%
- Northern Ireland: 2%
- Guernsey: 2%
- Republic of Ireland: 2%

Disability
- Yes: 12%
- No: 88%

Children in party travelling to Jersey
- With children: 13%
- Without children: 87%

Base: Repeat visitors to Jersey (886)
Focus on driving up preference of Jersey as this will maintain a strong relationship score, especially if performance deteriorates

The evening activities offer needs consideration. Although not an important driver, it falls behind competitors on performance so should be improved to increase the overall appeal of Jersey

Pay attention to the attributes within drivers that are not performing well. For example, transport in Jersey was well-received but prevalence and clarity of pedestrian signage was a constant pain-point (Action Prioritisation table)

Weekend/short break visitors were not as positive about overall value for money and shopping as everybody else, so work could be done in these two areas to be more favourable towards these types of visitors

More could be done to increase the appeal of Jersey’s beaches and countryside. Visitors already rank these higher than the rest of the UK and Ireland, so these features could be dialled up to attract more attention
The Jersey Experience
In this section...

- How strong is the relationship between Jersey and its visitors with regards to performance and preference?
- Which factors of the Jersey experience are most important to visitors?
- How does Jersey as a tourist destination perform on these important factors?
- What are the strengths and weaknesses of the key attributes of the Jersey visitor experience?
- What do people think of the overall value for money of Jersey as a tourist destination?
- What are the key memories that visitors have of Jersey?
Performance and preference define the strength of your visitor relationship.

Introducing the TRI*M Index

Calculating the TRI*M Index

Q010. All things considered, how do you rate Jersey as a short break/holiday destination? Would you say….; Q011. How strongly do you prefer Jersey as a short break/holiday destination rather than other short break destinations? Would you say….

Base: All respondents (1806)
Visitors with children tended to rate Jersey highly and posted a higher index score than couples without children and solo travellers. Visitors hiring a car were among the most positive overall.

Visitor Relationship Index – Jersey

<table>
<thead>
<tr>
<th>Groups with a comparatively high index</th>
<th>103</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visitors who have or are planning to hire a car</td>
<td>95</td>
</tr>
<tr>
<td>Those who are visiting friends/family</td>
<td>91</td>
</tr>
<tr>
<td>Visitors travelling with children aged under 5</td>
<td>91</td>
</tr>
<tr>
<td>Visitors travelling with children (under 16)</td>
<td>90</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Groups with a comparatively low index</th>
<th>84</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visitors who have or are planning to use a bus</td>
<td>81</td>
</tr>
<tr>
<td>Solo travellers</td>
<td>80</td>
</tr>
<tr>
<td>Travelled to Jersey by ferry</td>
<td>80</td>
</tr>
<tr>
<td>First time visitors</td>
<td>80</td>
</tr>
</tbody>
</table>

Q010. All things considered, how do you rate Jersey as a short break/holiday destination? Would you say….; Q011. How strongly do you prefer Jersey as a short break/holiday destination rather than other short break destinations? Would you say….

Base: All respondents (1806)
A key target for Jersey must be to reduce the gap between Performance (relatively highly rated by all visitors) and the extent to which Jersey is a preferred destination; the most successful brands and destinations exhibit high levels of Preference.

<table>
<thead>
<tr>
<th>Destination performance and preference by subgroup</th>
<th>TRI*M Index</th>
<th>Destination Performance</th>
<th>Destination Preference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Have or plan to hire a car</td>
<td>95</td>
<td>77</td>
<td>91 (n=350)</td>
</tr>
<tr>
<td>Visiting friends and/or family</td>
<td>91</td>
<td>71</td>
<td>91 (n=85)</td>
</tr>
<tr>
<td>Travelling with children under 5</td>
<td>104</td>
<td>78</td>
<td>104 (n=113)</td>
</tr>
<tr>
<td>Travelling with children</td>
<td>104</td>
<td>76</td>
<td>103 (n=253)</td>
</tr>
<tr>
<td>Jersey - Total</td>
<td>84</td>
<td>64</td>
<td></td>
</tr>
<tr>
<td>Have or plan to use a bus</td>
<td>81</td>
<td>60</td>
<td>81 (n=1,203)</td>
</tr>
<tr>
<td>Solo travellers</td>
<td>80</td>
<td>60</td>
<td>80 (n=74)</td>
</tr>
<tr>
<td>Arrived by ferry</td>
<td>80</td>
<td>60</td>
<td>80 (n=291)</td>
</tr>
<tr>
<td>First timers</td>
<td>80</td>
<td>60</td>
<td>80 (n=915)</td>
</tr>
</tbody>
</table>

Q010. All things considered, how do you rate Jersey as a short break/holiday destination? Would you say...;
Q011. How strongly do you prefer Jersey as a short break/holiday destination rather than other short break destinations? Would you say....
Base: All respondents (1806)
There is some variation between visitors in the off-peak months compared to those in the peak summer months. The large performance-preference gap amongst off-peak visitors suggests that, whilst they rate Jersey very highly, there is no clear preference over other destinations.
The youngest and, somewhat surprisingly, the oldest age groups seem to be the least engaged with Jersey as a destination, primarily because of the lower Preference scores. The 35-54 age group have the strongest relationship with Jersey, a promising opportunity as the basis for future visits.

### Destination performance and preference by age

<table>
<thead>
<tr>
<th>Age Group</th>
<th>TRI*M Index</th>
<th>Performance</th>
<th>Preference</th>
</tr>
</thead>
<tbody>
<tr>
<td>16-25</td>
<td>84</td>
<td>64</td>
<td>84</td>
</tr>
<tr>
<td>26-34</td>
<td>70</td>
<td>70</td>
<td>97</td>
</tr>
<tr>
<td>35-44</td>
<td>71</td>
<td>71</td>
<td>89</td>
</tr>
<tr>
<td>45-54</td>
<td>72</td>
<td>72</td>
<td>90</td>
</tr>
<tr>
<td>55-64</td>
<td>66</td>
<td>66</td>
<td>87</td>
</tr>
<tr>
<td>65+</td>
<td>58</td>
<td>58</td>
<td>78</td>
</tr>
</tbody>
</table>

**Q010. All things considered, how do you rate Jersey as a short break/holiday destination? Would you say…?**

**Q011. How strongly do you prefer Jersey as a short break/holiday destination rather than other short break destinations? Would you say…?**

*Base: All respondents (1806)*
Not surprisingly, the weather had an influence on the strength of visitors’ relationship with Jersey as a destination. Poorer weather resulted in lower index scores, especially in relation to Preference.

**Destination performance and preference by weather conditions**

<table>
<thead>
<tr>
<th>Weather Condition</th>
<th>Relationship Strength</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>83</td>
</tr>
<tr>
<td>Dry, warm</td>
<td>88</td>
</tr>
<tr>
<td>Some rain</td>
<td>84</td>
</tr>
<tr>
<td>Windy</td>
<td>98</td>
</tr>
<tr>
<td>Dry, cold</td>
<td>96</td>
</tr>
<tr>
<td>Heavy rain</td>
<td>89</td>
</tr>
</tbody>
</table>

**Q010.** All things considered, how do you rate Jersey as a short break/holiday destination? Would you say…;

**Q011.** How strongly do you prefer Jersey as a short break/holiday destination rather than other short break destinations? Would you say….

Base: All respondents (1743)
We asked which visitor destinations deliver an ‘excellent’ performance on nine elements that define a visit. Then we correlate the responses with the TRI*M Indices to determine the relative importance of each driver in terms of its strength of pull on the customer and Jersey's performance in each case. The optimal customer experience is defined by excellence in areas which really matter to customers.

This analysis helps to position Jersey’s performance on each of its competencies as well as indicating which competencies have the biggest ‘pull’ on customer engagement. Where is Jersey leading and where should it focus resources to gain ground on its competitors?
Jersey performs well on factors most important to visitors, but there is scope to improve tourist information. This should be an area of focus because its rating is not as high as other important drivers.

Strong performance on high level drivers (%)

<table>
<thead>
<tr>
<th>Aspect</th>
<th>Greatest pull</th>
<th>Strength of pull</th>
<th>Least pull</th>
</tr>
</thead>
<tbody>
<tr>
<td>Things to see and do</td>
<td>85</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Accommodation</td>
<td>79</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tourist information</td>
<td>58</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Eating out</td>
<td>69</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Getting to and from Jersey</td>
<td>80</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Getting around Jersey</td>
<td>83</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Overall value for money</td>
<td>60</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Shopping</td>
<td>36</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Evening activities</td>
<td>12</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Q020. Please tell me which destinations you feel deliver an excellent performance on the following aspects? You can choose as many or as few destinations as you like.
Base: All respondents (1821)
Although most drivers gained similar scores amongst subgroups, there were some major differences – particularly amongst weekend and short break visitors.

Strong performance on high level drivers (%)

<table>
<thead>
<tr>
<th>Things to see and do</th>
<th>85</th>
<th>Tourist information</th>
<th>58</th>
<th>Getting around in Jersey</th>
<th>83</th>
<th>Overall value for money</th>
<th>60</th>
</tr>
</thead>
<tbody>
<tr>
<td>Weekend/Short break visitors</td>
<td>77</td>
<td>Visitors with children</td>
<td>41</td>
<td>Weekend/Short break visitors</td>
<td>77</td>
<td>Weekend/Short break visitors</td>
<td>52</td>
</tr>
</tbody>
</table>

Q020. Please tell me which destinations you feel deliver an excellent performance on the following aspects? You can choose as many or as few destinations as you like. Base: All respondents (1821); Visitors with children (253); Weekend/short break (211)
Jersey’s performance was measured across 44 attributes – primarily sub-categories of the headline preference drivers already described. The analysis which follows models the impact of each attribute on the overall relationship strength if the performance of that attribute was to improve or deteriorate.

<table>
<thead>
<tr>
<th>Accommodation</th>
<th>Transport to/from Jersey</th>
<th>Transport getting around Jersey</th>
<th>Eating Out</th>
<th>Things to See and Do</th>
<th>Shopping</th>
<th>Tourist Information</th>
<th>Evening Activities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quality of accommodation</td>
<td>Choice of transportation</td>
<td>Variety of transportation</td>
<td>Range of cafes and restaurants</td>
<td>Range of things to see and do</td>
<td>Range of shops available</td>
<td>Ease of obtaining information</td>
<td>Range of things to see and do in the evenings/night</td>
</tr>
<tr>
<td>Range of accommodation available</td>
<td>Availability of flights/ferry crossings on my preferred travel dates</td>
<td>Availability of hire car services</td>
<td>Quality of food</td>
<td>Quality of experience provided</td>
<td>Quality of merchandise available in the shops</td>
<td>Ease of understanding information</td>
<td>Availability of family-friendly evening activities</td>
</tr>
<tr>
<td>Helpfulness and friendliness of staff</td>
<td>Cost of flights/ferry crossings</td>
<td>Availability of car parking</td>
<td>Level of service</td>
<td>Value for money/cost of things</td>
<td>opening hours of the shops</td>
<td>Quality of information provided</td>
<td>Feeling safe whilst experiencing the evening activities</td>
</tr>
<tr>
<td>Value for money</td>
<td>Frequency of flights/ferry crossings</td>
<td>Frequency of public transport services</td>
<td>Cost for money/cost of eating out</td>
<td>Helpfulness and friendliness of staff</td>
<td>Value for money/cost of merchandise</td>
<td>Availability/accessibility of information via online sources/apps</td>
<td>Value for money/cost of evening activities</td>
</tr>
<tr>
<td>Family-friendliness</td>
<td></td>
<td>Taxi services</td>
<td>Child/family-friendliness</td>
<td></td>
<td>Availability of local products</td>
<td>Ease of finding tourist information centre</td>
<td>Quality of evening activities</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Cost of public transport</td>
<td>Availability of locally produced/sourced foods</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
The action planning matrix identifies how to plan and where to focus action by plotting each of these 44 attributes. It illustrates how the performance on each attribute within the key drivers contributes to the overall relationship strength.

** Maintain – Reduced performance could have a negative effect on the relationship **

** Consider – No strong impact on the overall customer relationship **

** Invest – Improvements in this area are most critical **

** Build – This area includes aspects which have the potential to increase relationship strength **
The impact grids for each element of the visit help prioritise actions that need to be taken to improve levels of engagement with its visitors.

1. **Top Priority**
   - Below average and average performing attributes in the Invest area

2. **Top Priority**
   - Above average performing attributes in the Invest area

3. **High Priority**
   - Below average performing attributes in the Build area

4. **Medium Priority**
   - Average performing attributes in the Build area
Visitors are positive towards the range of activities in Jersey and further investment would deliver real benefit.

Things to see and do

- **E01** Range of things to see and do
- **E02** Quality of experience provided at attractions and/or when taking part in activities
- **E03** Helpfulness and friendliness of staff when visiting attractions and/or taking part in activities
- **E04** Value for money/cost of things to see and do

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Enjoyed my experience thus far. Fascinated by all the history and historical sites around the island hope to see and learn more.

Bit expensive.

Beautiful tranquil cultural island.

Things are a bit hit and miss. Some things we feel are a bit pricey, but others offer good value for money, such as Jersey Zoo.

Good variety for all interests.

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Q031: How would you rate Jersey's performance using the following scale: [Excellent; Very good; Good; Fair; Poor]

Base: All respondents (638)
Range and value for money of accommodation are the two aspects posting an average performance (compared with other attributes) and improvements in these areas would result in a gain in the relationship with visitors.

Accommodation

- ▲ A01 Quality of accommodation
- ○ A02 Range of accommodation available
- ▲ A03 Helpfulness and friendliness of staff at accommodation
- ○ A04 Value for money of accommodation
- ▲ A05 Family-friendliness of the accommodation

TRIFM

84

- ▼ Far below average
- ▼ Below average
- ○ Average
- ▲ Above average
- ▲ Far above average

Q027. How would you rate Jersey’s performance using the following scale: [Excellent; Very good; Good; Fair; Poor]

Base: All respondents (744)
Visitors’ experience of tourist information could be further improved by making it easier to find the Tourist Information Centre. All other aspects perform well and these levels should be maintained.

Tourist Information

- G01  Ease of obtaining information
- G02  Ease of understanding information
- G03  Quality of information provided
- G04  Availability/accessibility of information via online sources/apps
- G05  Ease of finding Tourist Information Centre

The tourist information was very good and the bus drivers had a good knowledge of the island.

Loads of excellent information.

Problem finding new tourist information office as had moved.

Could not find tourist information centre.

Hotel had lots of brochures and information.

Q034. How would you rate Jersey’s performance using the following scale: [Excellent; Very good; Good; Fair; Poor]
Base: All respondents (327)
Addressing the weak performances in terms of value for money and availability of locally produced/sourced foods is likely to strengthen relationships with visitors and further improve the reputation of eating out in Jersey.

**Eating out**

- **D01** Range of cafes and restaurants
- **D02** Quality of food
- **D03** Level of service
- **D04** Value for money/cost of eating out
- **D05** Child/family-friendliness of cafe/restaurant
- **D06** Availability of locally produced/sourced foods

**Fabulous food, fresh and excellent service.**

**Food expensive and pubs shut early especially on Sunday.**

**Good quality but expensive.**

**No sign of local products not marked jersey new potatoes just new potatoes.**

**Wide price range and choice.**

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**No.4 in Strength of Pull**

<table>
<thead>
<tr>
<th>Eating Out</th>
</tr>
</thead>
<tbody>
<tr>
<td>Range of cafes and restaurants</td>
</tr>
<tr>
<td>Quality of food</td>
</tr>
<tr>
<td>Level of service</td>
</tr>
<tr>
<td>Value for money/cost of eating out</td>
</tr>
<tr>
<td>Child/family-friendliness</td>
</tr>
<tr>
<td>Availability of locally produced/sourced foods</td>
</tr>
</tbody>
</table>

**Q030. How would you rate Jersey’s performance using the following scale: [Excellent; Very good; Good; Fair; Poor]**

**Base: All respondents (435)**

- Far below average
- Below average
- Average
- Above average
- Far above average
Immediate items for consideration are the cost and frequency of flights and ferry crossings. The threat to the relationship with visitors is currently not too high, but performance is far below average.

Transportation to/from Jersey

- B01 The choice of transportation to/from Jersey
- B02 The availability of flights/ferry crossings on my preferred travel dates
- B03 Cost of flights/ferry crossings
- B04 Frequency of flights/ferry crossings

Quite expensive and only one ferry.
The cost of flights is prohibitive, otherwise we’d come here more often. It’s a big part of the holiday cost.

Very quick and easy.

Slight delay with flights but smooth once aboard plane.

Flights excellent and on time.

Ok but need more flights.

Q028. How would you rate Jersey’s performance using the following scale: [Excellent; Very good; Good; Fair; Poor]
Base: All respondents (380)
Frequency of public transport services has received praise and it is recommended that this an area for investment. There is also scope to invest in the prevalence of pedestrian signage and the cost of public transport because both pose high threats to relationships if ignored.

Transportation getting around Jersey

- C01 Variety of transportation
- C02 Availability of hire car services
- C03 Availability of car parking
- C04 Cost of car parking
- C05 Frequency of public transport services
- C06 Taxi services
- C07 Cost of public transport
- C08 Prevalence and clarity of road signage
- C09 Prevalence and clarity of pedestrian signage

The bus service is excellent, really good - and very affordable.
The couple of times that we took taxis we found them far too expensive.
Little frustrating, signs hard to see.

Q029. How would you rate Jersey’s performance using the following scale: [Excellent; Very good; Good; Fair; Poor] ** Low base size; calculation of gain/threat potential not possible

Base: All respondents (433)
Cost of public transport exhibited a below average performance in Jersey, but only a handful of people mentioned the cost of taxis when asked to recall their experience of transportation.

**Thoughts and views on the taxi service in Jersey**

- **432** visitors gave their thoughts on the transportation services in Jersey.
- Of these, **5** mentioned the cost of the taxi service.

- "Taxi service far too expensive"
- "Taxis charged a fortune the evening"
- "Had a bad experience with a taxi driver which charged me a lot more money than the metre shown so I confronted him and we began to argue"
- "Unhappy with bus service from winery on bank holiday, a lot of people stranded had to pay for very expensive taxi"
- "The couple of times that we took taxis we found them far too expensive."

Q039. Thinking again about transportation getting around Jersey, how do you feel about your experience, and why

Base: All respondents who were asked this block of questions (433)
Retail priorities include reviewing the range of shops available and the opening hours of these shops because they currently pose a relatively high threat to the strength of the visitor relationship.

**Shopping**
- F01 Range of shops available
- F02 Quality of merchandise available in the shops
- F03 Opening hours of the shops
- F04 Helpfulness and friendliness of staff in the shops
- F05 Value for money/cost of merchandise
- F06 Availability of local products

We'd expect more shops to be open on a Sunday, especially for day trippers.

Expensive, limited choice. Many shops closed.

Staff very friendly.

Enjoying buying local products.

Food is expensive in supermarkets.

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Q032. How would you rate Jersey’s performance using the following scale: [Excellent; Very good; Good; Fair; Poor] Base: All respondents (226)
The weakest part of Jersey’s offer is its evening activities, but visitors also placed the least importance on this aspect. Consequently, there is not an immediate need to drastically improve things, but over time, the range, value and quality of such activities all need to be considered.

**Evening activities**

- **H01** Range of things to do in the evenings/night
- **H02** Availability of family-friendly evening activities**
- **H03** Feeling safe whilst experiencing the evening activities
- **H04** Value for money/cost of evening activities
- **H05** Quality of evening activities

Overpriced but enjoyable.

- Will eat out every night apart from Sunday when it rained. Enjoy walks at night feel safe and happy.
- Good pubs and felt safe.
- Nothing to do in evenings everything shuts at six - a ghost town.
- Hotel has kept us entertained.

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**No.9 in Strength of Pull**

<table>
<thead>
<tr>
<th>Evening Activities</th>
<th>TRIM</th>
<th>No. 9 in Strength of Pull</th>
</tr>
</thead>
<tbody>
<tr>
<td>Range of things to see and do in the evenings/night</td>
<td>H01</td>
<td></td>
</tr>
<tr>
<td>Availability of family-friendly evening activities**</td>
<td>H02</td>
<td></td>
</tr>
<tr>
<td>Feeling safe whilst experiencing the evening activities</td>
<td>H03</td>
<td></td>
</tr>
<tr>
<td>Value for money/cost of evening activities</td>
<td>H04</td>
<td></td>
</tr>
<tr>
<td>Quality of evening activities</td>
<td>H05</td>
<td></td>
</tr>
</tbody>
</table>

Q062: How would you rate Jersey’s performance using the following scale: [Excellent; Very good; Good; Fair; Poor] ** Low base size; calculation of gain/threat potential not possible

Base: All respondents (116)
Summary of relative strengths and weaknesses

Despite evening activities performing poorly overall, there are other weak areas which require some attention. Some aspects, such as the range of accommodation and cost of public transport, are part of high-scoring overall areas (accommodation, transport in Jersey) and so fine tuning the smaller details is a good way to maintain overall strong performances.

<table>
<thead>
<tr>
<th>Accommodation</th>
<th>Strengths</th>
<th>Weaknesses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quality of accommodation</td>
<td>Range of accommodation available</td>
<td>Range of accommodation available</td>
</tr>
<tr>
<td>Helpfulness and friendliness of staff at accommodation</td>
<td>Value of money of accommodation</td>
<td>Value of money of accommodation</td>
</tr>
<tr>
<td><strong>Transportation getting around Jersey</strong></td>
<td><strong>Strengths</strong></td>
<td><strong>Weaknesses</strong></td>
</tr>
<tr>
<td>Variety of transportation</td>
<td>Range of cafes and restaurants</td>
<td>Cost of public transport</td>
</tr>
<tr>
<td>Availability of hire car services</td>
<td>Quality of food</td>
<td>Prevalence and clarity of pedestrian signage</td>
</tr>
<tr>
<td>Frequency of public transport services</td>
<td>Level of service</td>
<td><strong>Eating out</strong></td>
</tr>
<tr>
<td>Taxi services</td>
<td>Child/family-friendliness of café/restaurant</td>
<td>Value for money/cost of eating</td>
</tr>
<tr>
<td><strong>Eating out</strong></td>
<td><strong>Strengths</strong></td>
<td><strong>Weaknesses</strong></td>
</tr>
<tr>
<td>Range of cafes and restaurants</td>
<td>Range of cafes and restaurants</td>
<td>Availability of locally produced/sourced foods</td>
</tr>
<tr>
<td>Quality of food</td>
<td>Quality of food</td>
<td><strong>Shopping</strong></td>
</tr>
<tr>
<td>Level of service</td>
<td>Level of service</td>
<td>Range of shops available</td>
</tr>
<tr>
<td>Child/family-friendliness of café/restaurant</td>
<td>Child/family-friendliness of café/restaurant</td>
<td>Opening hours of the shops</td>
</tr>
<tr>
<td><strong>Things to see and do</strong></td>
<td><strong>Strengths</strong></td>
<td><strong>Weaknesses</strong></td>
</tr>
<tr>
<td>Range of things to see and do</td>
<td>Range of things to see and do</td>
<td><strong>Information</strong></td>
</tr>
<tr>
<td>Quality of experience provided at attractions and/or when taking part in activities</td>
<td>Quality of experience provided at attractions and/or when taking part in activities</td>
<td>Ease of finding Tourist Information Centre</td>
</tr>
<tr>
<td>Helpfulness and friendliness of staff when visiting attractions and/or taking part in activities</td>
<td>Helpfulness and friendliness of staff when visiting attractions and/or taking part in activities</td>
<td><strong>Tourist information</strong></td>
</tr>
<tr>
<td>Ease of understanding information</td>
<td>Ease of understanding information</td>
<td><strong>Ease of understanding information</strong></td>
</tr>
<tr>
<td>Availability/accessibility of information via online sources/apps</td>
<td>Availability/accessibility of information via online sources/apps</td>
<td><strong>Ease of understanding information</strong></td>
</tr>
</tbody>
</table>

Q027, Q028, Q029, Q030, Q031, Q032, Q034, Q062. How would you rate Jersey’s performance using the following scale: [Excellent; Very good; Good; Fair; Poor] Base: Accommodation (744); Transportation to/from Jersey (380); Transportation getting around Jersey (433); Eating out (435); Things to see and do (638); Shopping (226); Tourist information (327); Evening activities (116)
# Action prioritisation

Immediate priorities to strengthen visitor relationships are to address the perceived high cost of public transport and increase the prevalence of pedestrian signage and locally produced/sourced foods. There are also some areas in which Jersey already performs well but additional investment could further strengthen relationships – these include the quality of accommodation and food and the range of things to see and do.

<table>
<thead>
<tr>
<th></th>
<th>Accommodation</th>
<th>Transportation getting around Jersey</th>
<th>Eating out</th>
<th>Things to see and do</th>
<th>Shopping</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Fix it now</strong></td>
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<tr>
<td></td>
<td></td>
<td>C07. Cost of public transport**</td>
<td></td>
<td>D06. Availability of locally produced/sourced foods</td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>C09. Prevalence and clarity of pedestrian signage</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Fix it later</strong></td>
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</tr>
<tr>
<td></td>
<td>A02. Range of accommodation available</td>
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<tr>
<td></td>
<td>A04. Value for money of accommodation</td>
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</tr>
<tr>
<td><strong>Expand</strong></td>
<td></td>
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</tr>
<tr>
<td></td>
<td>A01. Quality of accommodation</td>
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</tr>
<tr>
<td></td>
<td>C01. Variety of transportation</td>
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<tr>
<td></td>
<td>C02. Availability of hire car services</td>
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<tr>
<td></td>
<td>C05. Frequency of public transport services</td>
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<td></td>
<td>D01. Range of cafes and restaurants</td>
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</tr>
<tr>
<td></td>
<td>D02. Quality of food</td>
<td></td>
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<td></td>
</tr>
<tr>
<td></td>
<td>E01 Range of things to do and see</td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td></td>
<td>E03. Helpfulness and friendliness of staff when visiting attractions and/or taking part in activities</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Q027, Q028, Q029, Q030, Q031, Q032, Q034, Q036.** How would you rate Jersey’s performance using the following scale: [Excellent; Very good; Good; Fair; Poor]

Base: Accommodation (744); Transportation to/from Jersey (380); Transportation getting around Jersey (433); Eating out (435); Things to see and do (638); Shopping (226); Tourist information (327); Evening activities (116)
Most of the negative comments about the value of money in Jersey referred to the high costs of activities and eating out. Many felt it was more expensive than the rest of the UK.

**Value for money**

**Positives**

- Get what you pay for. Quality is important and this comes across in Jersey.
- Yes, have been all over Jersey and it is good value for money.
- Jersey appears to be a very good venue for coastal walks and therefore very good value for money.
- Jersey is great, love everything and happy to pay.
- Jersey is very good value for money, clean and well cared for, nothing has been neglected, no unopened shops, all tourist attractions well looked after.
- Jersey is value for money, been three times, lots to do and great food.
- Jersey is value for money, some places have doubled in price in the world but not Jersey.
- Jersey is value for money, it is peaceful and free of stress so worth every penny.
- Jersey is great value for money, will come back again and again, it’s a home from home.

**Negatives**

- Everything is expensive here. We haven’t managed to do a lot as most things cost you an arm and a leg.
- Eating out is expensive compared to the UK.
- Jersey has lost a lot of its night activities and not good value for money.
- Jersey has lost the plot a bit with prices, sixteen pounds for two drinks is too much.
- Didn’t expect to pay to go into museums as in UK only give donation, Jersey is not value for money.
- Jersey is getting a bit too expensive, noticed all prices gone up or aimed at young children.
- Jersey is very poor value for money, nothing of interest, too built up and no gardens.
- We have noticed a big increase in the cost since last years visit to the island.
- Jersey is not value for money, heritage sites and food are too expensive.
Positive key memories of Jersey feature the variety of things to see and do as well as the friendliness of its people. On the other hand, high prices and lack of information were prevalent themes for negative memories.

**Key Memory**

<table>
<thead>
<tr>
<th>Positives</th>
<th>Negatives</th>
</tr>
</thead>
<tbody>
<tr>
<td>Love Jersey, it's very pretty and has pleasant people. Love the fact people have time to stop when you cross roads.</td>
<td>The key memory this visit is the amount of cars and busy way of life.</td>
</tr>
<tr>
<td>Sunset at St Brelade’s last night. It was a glorious evening and the tide was in. That's what is so special about Jersey and is why we keep coming back.</td>
<td>Unfortunately, it's the fact that there's no car parking at our hotel (Pomme d'Or) as my husband has a disability, it has been a real pain.</td>
</tr>
<tr>
<td>Jersey Zoo. We think it's fabulous. It's beautiful, well run, informative, and we're passionate about the work they do.</td>
<td>Island has become overpopulated compared to first visit in 1962.</td>
</tr>
<tr>
<td>From what we've seen so far we've been very impressed. The island is stunning. The whole place is a pleasure, it's got a bit of magic to it.</td>
<td>Feel lost re. information and helpfulness of maps. Tourism office needs to be very clearly sign posted.</td>
</tr>
<tr>
<td>There isn't one thing that stands out - the whole ambience and politeness is great. Astounded by how polite people are and the Jersey way is great. People can't do enough for you.</td>
<td>Key memory is that unfortunately how the island has changed, not for the better, e.g. things have become too commercialised.</td>
</tr>
<tr>
<td>Yesterday was a magical day with the full island tour, saw lots of wonderful historic things, beautiful, stunning beaches, safe for children, good for parents. Very good cafes and things on offer.</td>
<td>Full of cars and permanent traffic jams.</td>
</tr>
<tr>
<td>The beaches are fantastic, and so clean. We love St Brelade’s and St Ouen’s Bay.</td>
<td>Difficult to find things in Jersey.</td>
</tr>
<tr>
<td>Sick of Condor ferry which is often late and very uncomfortable. No day trips from Poole.</td>
<td>Not happy with prices, far too expensive.</td>
</tr>
<tr>
<td>Not enjoying Jersey much, prefer England.</td>
<td></td>
</tr>
</tbody>
</table>

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Q025. Thinking about your experiences on this visit so far, what is the one key memory that you will take home with you? Base: All respondents (1821)
Summary of Jersey

Overview
Jersey’s relationship index of 84 is driven by its high performance score of 103.
- There is an immediate need to drive up preference to increase overall visitor relationship.
- Particular focus on the 35-54 age group who are relatively well disposed to Jersey and represent a segment worth investing in for the future.
- Jersey performs well on factors important to its visitors such as ‘things to see and do’, ‘accommodation’ and ‘eating out’.
- ‘Tourist information’ is also important to visitors – Jersey need to improve on this score to bring it more in line with their performance in other important areas.
- Transport in Jersey was another high-performing driver, but two areas of weakness were the cost of the service and the prevalence and clarity of pedestrian signage.

There were varying strengths of relationships amongst key sub-groups
- Visitors who had or were planning to hire a car were the most favourable towards Jersey overall. The availability of hire car services was a strength of the Jersey visitor experience.
- Those visiting friends and family and those travelling with children also scored highly.
- Parties with children were particularly positive towards food, helpfulness of staff and ease of understanding tourist information.
- On the other hand, they were dissatisfied with the cost of merchandise, availability of car parking and the range of accommodation available.
- First time visitors were the group least satisfied with Jersey. Particular problems were the ease of finding the tourist information centre, the opening hours of shops and frequency of ferry crossing and flights.

Factors that matter most
- Things to see and do
- Accommodation
- Tourist information

Priority areas of focus
- Cost of public transport
- Prevalence and clarity of pedestrian signage
- Availability of locally produced/sourced foods

Positive areas in which to invest and expand
- Quality of accommodation
- Transport
  - Variety
  - Availability of car hire services
  - Frequency of public transport services
- Dining and eating out
  - Range of cafes and restaurants
  - Quality of food
- Things to see and do
  - Range of sights, attractions and activities
  - Helpfulness and friendliness of staff
In summary…

How strong is the relationship between Jersey and its visitors with regards to performance and preference?

Performance is strong but Preference could be improved to consolidate a competitive advantage

Which factors of the Jersey experience are most important to visitors?

The three most important drivers are ‘things to see and do’, ‘accommodation’ and ‘tourist information’.

How does Jersey as a tourist destination perform on these important factors?

Jersey performs well on ‘things to see & do’ and ‘accommodation’ but their performance for ‘tourist information’ could be improved to bring it more in line with the top 2

What are the strengths and weaknesses of the key attributes of the Jersey visitor experience?

Quality of the accommodation in Jersey was a particular strength as well as the range of things to see and do amongst many others. Particular weaknesses included the value for money of eating out and accommodation

What do people think of the overall value for money of Jersey as a tourist destination?

Whilst many praised the range of things to see and do as validation for the costs, others think the island is becoming more and more expensive over time, especially compared to the rest of the UK.

What are the key memories that visitors have of Jersey?

Many remember the people and scenery positively, but negative memories included increasing road traffic, prices and commercialisation
3

Jersey – the competitive context
In this section...

- How strong is the relationship between Jersey and its visitors with regards to performance and preference compared to that of competitor destinations?
- Does the ranking of relationship strength of Jersey and competitor destinations differ amongst key subgroups?
- In which specific attributes does Jersey score well compared to competitor destinations?
- Are there any major differences in perceived performances against competitor destinations amongst key subgroups?
- How do people rate the quality of Jersey’s beaches, countryside, villages, and towns compared to the rest of the UK and Republic of Ireland?
Jersey outperforms its UK and Ireland competitors for relationship strength. This is mainly driven by a high performance score compared to the other destinations.

Visitor Relationship Index – Jersey

<table>
<thead>
<tr>
<th>Destination</th>
<th>Relationship Strength</th>
<th>Performance</th>
<th>Preference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jersey</td>
<td>84</td>
<td>64</td>
<td>25</td>
</tr>
<tr>
<td>Lake District</td>
<td>71</td>
<td>55</td>
<td>23</td>
</tr>
<tr>
<td>Republic of Ireland</td>
<td>70</td>
<td>51</td>
<td>21</td>
</tr>
<tr>
<td>Cornwall / Devon / Isle of Scilly</td>
<td>65</td>
<td>47</td>
<td>14</td>
</tr>
<tr>
<td>Cotswolds</td>
<td>64</td>
<td>42</td>
<td>13</td>
</tr>
<tr>
<td>Scotland</td>
<td>63</td>
<td>43</td>
<td>13</td>
</tr>
<tr>
<td>Northumbria / Yorkshire</td>
<td>60</td>
<td>38</td>
<td>10</td>
</tr>
<tr>
<td>Somerset / Dorset / Hampshire / Isle of Wight</td>
<td>54</td>
<td>38</td>
<td>10</td>
</tr>
<tr>
<td>Kent / Sussex</td>
<td>53</td>
<td>36</td>
<td>10</td>
</tr>
<tr>
<td>East Anglia</td>
<td>53</td>
<td>32</td>
<td>10</td>
</tr>
<tr>
<td>Wales</td>
<td>74</td>
<td>54</td>
<td>38</td>
</tr>
</tbody>
</table>

**Note:**
- **n=1,806** for Jersey
- **n=268** for Lake District
- **n=92** for Republic of Ireland
- **n=382** for Cornwall / Devon / Isle of Scilly
- **n=361** for Cotswolds
- **n=392** for Scotland
- **n=292** for Northumbria / Yorkshire
- **n=224** for Somerset / Dorset / Hampshire / Isle of Wight
- **n=136** for Kent / Sussex
- **n=133** for East Anglia
- **n=253** for Wales

Q010, Q012, Q014. All things considered, how do you rate [destination] as a short break/holiday destination? Would you say...; Q011, Q013, Q015. How strongly do you prefer [destination] as a short break/holiday destination rather than other short break destinations? Would you say...
A key to strengthening visitor relationships is to develop a competitive advantage by being in the position of being the most preferred tourist destination. This will help keep the overall relationship strong even if performance suffers.

**Contribution of Preference to Visitor Relationship Index**

By dividing the Preference score by the overall index score, we can understand the size of the preference in comparison to the overall score. The higher the number, the more influence preference has on relationship strength.

<table>
<thead>
<tr>
<th>Destination</th>
<th>Preference</th>
<th>TRI*M Index</th>
<th>Index Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jersey</td>
<td>64</td>
<td>84</td>
<td>0.76</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Lake District</th>
<th>Republic of Ireland</th>
<th>Cornwall/ Devon/ Isle of Scilly</th>
<th>Cotswolds</th>
<th>Scotland</th>
<th>Northumbria/ Yorkshire</th>
<th>Somerset/ Dorset/ Hampshire/ Isle of Wight</th>
<th>Kent/ Sussex</th>
<th>East Anglia</th>
<th>Wales</th>
</tr>
</thead>
<tbody>
<tr>
<td>0.77</td>
<td>0.73</td>
<td>0.72</td>
<td>0.66</td>
<td>0.68</td>
<td>0.63</td>
<td>0.67</td>
<td>0.70</td>
<td>0.68</td>
<td>0.60</td>
</tr>
</tbody>
</table>

Base: Jersey (1806); Lake District (268); Republic of Ireland (92); Cornwall/ Devon/ Isle of Scilly (382); Cotswolds (111); Scotland (361); Northumbria/ Yorkshire (292); Somerset/ Dorset/ Hampshire/ Isle of Wight (224); Kent/ Sussex (136); East Anglia (133); Wales (253)
More than 8 in 10 had previously visited at least one of the competitor destinations in the last 3 years. Cornwall/ Devon/ Isle of Scilly was the most popular.

Q037. For leisure purposes, which of the following short break/holiday destinations have you visited in the last 3 years?

- Cornwall/ Devon/ Isle of Scilly: 28%
- Scotland: 25%
- Northumbria/Yorkshire: 22%
- Lake District: 21%
- Wales: 21%
- Somerset / Dorset / Hampshire / Isle of Wight: 20%
- Kent / Sussex: 12%
- East Anglia: 11%
- Cotswolds: 11%
- Republic of Ireland: 8%
- None of these: 13%

Base: All respondents (1821)
Lake District and Cornwall/Devon/Isle of Scilly were strong performing destinations amongst most key subgroups. Scotland scored particularly well with couples and those seeking weekend and short breaks.

TRI*M Index – Jersey vs. competitor destinations
Subgroups – top 5 Visitor Relationship Scores

<table>
<thead>
<tr>
<th>First Timers</th>
<th>Jersey</th>
<th>80</th>
<th>Lake District</th>
<th>72</th>
<th>Republic of Ireland</th>
<th>70</th>
<th>Cornwall, Devon, Isle of Scilly</th>
<th>67</th>
<th>Cotswolds</th>
<th>66</th>
</tr>
</thead>
<tbody>
<tr>
<td>Couples (no children)</td>
<td>Jersey</td>
<td>82</td>
<td>Republic of Ireland</td>
<td>70</td>
<td>Lake District</td>
<td>69</td>
<td>Scotland</td>
<td>65</td>
<td>Cotswolds</td>
<td>63</td>
</tr>
<tr>
<td>Weekend/short break</td>
<td>Jersey</td>
<td>88</td>
<td>Scotland</td>
<td>75</td>
<td>Lake District</td>
<td>68</td>
<td>Cornwall, Devon, Isle of Scilly</td>
<td>66</td>
<td>Somerset, Dorset, Hampshire, Isle of Wight</td>
<td>64</td>
</tr>
<tr>
<td>Longer holiday</td>
<td>Jersey</td>
<td>83</td>
<td>Lake District</td>
<td>71</td>
<td>Republic of Ireland</td>
<td>68</td>
<td>Cotswolds</td>
<td>67</td>
<td>Cornwall, Devon, Isle of Scilly</td>
<td>65</td>
</tr>
</tbody>
</table>

Q010, Q012, Q014. All things considered, how do you rate [destination] as a short break/holiday destination? Would you say...; Q011, Q013, Q015. How strongly do you prefer [destination] as a short break/holiday destination rather than other short break destinations? Would you say... Base: First timers (915); Repeat visitors (880); Families with children (253); Couples (no children) (1223); Weekend/short break (211); Longer holiday (1542)
Jersey performs well on factors most important to visitors, but there is scope to improve tourist information. This should be an area of focus because its rating is not as high as other important drivers.

Strong performance on high level drivers (%)
Evening activities is the one dimension on which Jersey falls behind the competition at a total level. However, visitors place the least importance on this particular attribute.

**Competitive Profile – Total**

**Dimensions**
- Things to see and do
- Accommodation
- Tourist information
- Eating out
- Transportation - getting to and from the destination
- Transportation - getting around whilst in the destination
- Overall value for money
- Shopping
- Evening activities

**Performance**

0% 50% 100%

**Best competitor**
- Scotland
- Republic of Ireland

**Q020. Please tell me which destinations you feel deliver an excellent performance on the following aspects? You can choose as many or as few destinations as you like.**

*Base: All respondents (1821)*
According to those who visited for a weekend or short break, Jersey is also behind other destinations for overall value for money and shopping.

**Competitive Profile – Weekend/Short Break**

<table>
<thead>
<tr>
<th>Dimensions</th>
<th>Performance</th>
<th>Best competitor</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tourist information</td>
<td></td>
<td>Scotland</td>
</tr>
<tr>
<td>Things to see and do</td>
<td></td>
<td>Scotland</td>
</tr>
<tr>
<td>Transportation - getting around whilst in the destination</td>
<td></td>
<td>Wales</td>
</tr>
<tr>
<td>Eating out</td>
<td></td>
<td>Scotland</td>
</tr>
<tr>
<td>Accommodation</td>
<td></td>
<td>Scotland</td>
</tr>
<tr>
<td>Transportation - getting to and from the destination</td>
<td></td>
<td>Kent / Sussex</td>
</tr>
<tr>
<td>Overall value for money</td>
<td></td>
<td>Wales</td>
</tr>
<tr>
<td>Shopping</td>
<td></td>
<td>Kent / Sussex</td>
</tr>
<tr>
<td>Evening activities</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Q020. Please tell me which destinations you feel deliver an excellent performance on the following aspects? You can choose as many or as few destinations as you like.**

*Base: Those visiting Jersey for a weekend/short break (1-3 nights) (211)*
The beaches in Jersey are a popular and well-regarded feature of the island with over 8 in 10 people considering them better than the rest of the UK and Ireland.

Jersey compared to other UK and Ireland destinations – Beaches (%)

- Considerably better: 55%
- A little bit better: 27%
- About the same: 9%
- A little bit worse: 1%
- Considerably worse: 0%
- Don't know: 7%

Q065. How would you rate Jersey compared to other destinations in the UK and Republic of Ireland for its…
Base: All respondents [half sample] (890)
Jersey’s countryside also has a good reputation

Jersey compared to other UK and Ireland destinations – Countryside (%)

- Considerably better: 18%
- A little bit better: 55%
- About the same: 16%
- A little bit worse: 2%
- Considerably worse: 0%
- Don't know: 9%
A relatively large number of people stated that they ‘don’t know’ if Jersey’s villages are better than others in the UK and Ireland.

<table>
<thead>
<tr>
<th>Response</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Considerably better</td>
<td>7</td>
</tr>
<tr>
<td>A little bit better</td>
<td>45</td>
</tr>
<tr>
<td>About the same</td>
<td>17</td>
</tr>
<tr>
<td>A little bit worse</td>
<td>2</td>
</tr>
<tr>
<td>Considerably worse</td>
<td>0</td>
</tr>
<tr>
<td>Don't know</td>
<td>29</td>
</tr>
</tbody>
</table>

Q065. How would you rate Jersey compared to other destinations in the UK and Republic of Ireland for its…
Base: All respondents [half sample] (890)
A relatively large proportion of visitors rated the towns in Jersey the same as the rest of the country and Ireland. Similar to its villages, the unique features of Jersey’s towns need to be highlighted in order to distinguish the island from other destinations.

Jersey compared to other UK and Ireland destinations – Towns (%)

- Considerably better: 7
- A little bit better: 47
- About the same: 32
- A little bit worse: 4
- Considerably worse: 0
- Don’t know: 9
To summarise - Jersey versus the competition

Overview

Overall, Jersey outperforms competitor destinations on most key measures

▪ Jersey records a higher visitor relationship index than all competitor destinations.
▪ The same is true amongst key subgroups, although the ranking after Jersey varies.
▪ Lake District performs well with most subgroups, whereas Scotland is particularly popular with couples and those seeking weekend or short breaks.

Jersey needs to address the lukewarm response to its offer of evening activities

▪ Although visitors to Jersey do not regard evening activities as a highly important factor, it is the only attribute on which Jersey is outperformed by rival destinations at a total level.
▪ Performance levels and ranking amongst other destinations are fairly consistent across subgroups. However, there are a couple of points of note:
  ▪ Amongst weekend and short break visitors, Jersey is outperformed by two other destinations for overall value for money. It is also second to Kent/Sussex for shopping.
  ▪ However, Jersey is well ahead of the competition for accommodation and transportation in Jersey when rated by those with a long-standing disability of impairment.

Beaches, countryside, towns and villages

▪ Only a handful of visitors (7 people) rated Jersey ‘considerably worse’ than other destinations in the UK or Ireland for its beaches, towns, villages and/or countryside.

▪ Around half of visitors thought Jersey was ‘a little bit better’ than its counterparts in all of these areas.

▪ A third of visitors of stated ‘don’t know’ when asked how Jersey’s villages compared to the rest of the UK or Ireland.

▪ Jersey’s beaches received the best rating, with over 8 in 10 visitors claiming they thought the beaches were better than those found elsewhere in the UK or Ireland (27% ‘considerably better; 55% ‘a little bit better’).
In summary....

How strong is the relationship between
Jersey and its visitors with regards to
performance and preference compared
to that of competitor destinations?

Jersey has the strongest score amongst the
competition. This was expected given we
were interviewing in Jersey during the visit.

Does the ranking of relationship strength of
Jersey and competitor destinations differ
amongst key subgroups?

The same four or five destinations frequently
appear as the most popular amongst most of
the subgroups. Scotland is particularly popular
with people taking weekend trips or short
breaks, whilst families with children rate
Cornwall, Devon and Isle of Scilly higher than
most other destinations.

In which specific attributes does Jersey
score well compared to competitor
destinations?

Jersey outperforms competitor destinations
on all key drivers at total level other than
evening activities where Scotland is the best
performer.

Are there any major differences in
perceived performances against competitor
destinations amongst key subgroups?

Amongst subgroups, the ratings are more or
less in line with total levels. A couple of
standouts are the overall value for money and
shopping amongst weekend and short break
visitors, who rated Jersey lower than Wales
and Kent/ Sussex respectively.

How do people rate the quality of Jersey’s
beaches, countryside, villages & towns
compared to the rest of the UK and Ireland?

None of the visitors interviewed rated Jersey
‘considerably worse’ than other UK and Ireland
destinations in the above areas. The most
positive aspect was for the beaches, where
82% stated they were better than competitor
destinations.
Insights and Recommendations

**Insights**

Jersey has a strong relationship with its visitors and this is reflected in its strong performance score

Preference for Jersey could be a little higher and this is key to sustaining a competitive advantage

Although key subgroups had varying strengths of relationships with Jersey, there was a fairly consistent pattern in their ratings for each of the key drivers

The main variation was that weekend and short break visitors felt that Jersey did not perform as well on overall value for money and shopping as Wales and Kent/Sussex respectively.

Things to see and do, accommodation and tourist information were factors most important to visitors. The ranking varied slightly between subgroups but these three drivers consistently appeared in the top 4.

One key area of weakness for Jersey is evening activities

**Recommendations**

Focus on driving up preference of Jersey as this will maintain a strong relationship score, especially if performance deteriorates

The evening activities offer needs consideration. Although not an important driver, it falls behind the rest on performance so should be improved to increase the overall appeal of Jersey

Pay attention to the attributes within drivers that are not performing well. For example, transport in Jersey was well-received but prevalence and clarity of pedestrian signage was a constant pain-point so this would need addressing (Action Prioritisation table)

Weekend/short break visitors were not as positive about overall value for money and shopping as everybody else, so work could be done in these two areas to be more favourable towards these types of visitors

More could be done increase the appeal of Jersey's beaches and countryside. Visitors already rank these higher than the rest of the UK and Ireland, so these features could be dialled up to attract more attention
4 Disabilities and impairments
Disability and impairment profile

<table>
<thead>
<tr>
<th>Disability or impairment</th>
<th>Number of visitors</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vision, for example, due to blindness or partial sight</td>
<td>17</td>
</tr>
<tr>
<td>Hearing, for example, due to deafness or partial hearing</td>
<td>19</td>
</tr>
<tr>
<td>Mobility, such as difficulty walking short distances, climbing stairs, lifting &amp; carrying objects</td>
<td>139</td>
</tr>
<tr>
<td>Learning or concentrating or remembering</td>
<td>10</td>
</tr>
<tr>
<td>Mental health</td>
<td>1</td>
</tr>
<tr>
<td>Other</td>
<td>19</td>
</tr>
<tr>
<td>Don't know</td>
<td>1</td>
</tr>
<tr>
<td>Refuse</td>
<td>3</td>
</tr>
</tbody>
</table>

Base: Visitors with long-standing disability or impairment (188)
There was hardly any variation in the relationship strength between those with a long-standing disability or impairment and those without. Both were in line with the overall index.

Destination performance and preference

<table>
<thead>
<tr>
<th></th>
<th>TRI*M Index</th>
<th>Performance</th>
<th>Preference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>84</td>
<td>64</td>
<td>103</td>
</tr>
<tr>
<td>Yes</td>
<td>83</td>
<td>68</td>
<td>99</td>
</tr>
<tr>
<td>No</td>
<td>84</td>
<td>64</td>
<td>103</td>
</tr>
</tbody>
</table>

n=1,806  n=188  n=1,607

Q067. Do you have a long-standing disability or impairment (sensory, physical or otherwise)? By longstanding I mean anything that has troubled you over a long period of time or that is likely to affect you over a period of time.
Base: All respondents (1806)
A key area of focus amongst disabled visitors is their shopping experience because it is the most important driver, yet it is one on which Jersey performs poorly.

**Strength of pull**

<table>
<thead>
<tr>
<th>Aspect</th>
<th>Greatest pull</th>
<th>Strength of pull</th>
<th>Least pull</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shopping</td>
<td>40</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Accommodation</td>
<td>85</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Eating out</td>
<td>68</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Getting to and from Jersey</td>
<td>84</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Evening activities</td>
<td>84</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tourist information</td>
<td>11</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Things to see and do</td>
<td>49</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Getting around in Jersey</td>
<td>82</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Overall value for money</td>
<td>84</td>
<td></td>
<td>62</td>
</tr>
</tbody>
</table>

Q020. Please tell me which destinations you feel deliver an excellent performance on the following aspects? You can choose as many or as few destinations as you like.
Base: Visitors with long-standing disability or impairment (188)
For those who suffer from a disability or impairment, Jersey is well ahead of the competition for accommodation and transport on the island.

Competitive Profile – Disability or impairment

<table>
<thead>
<tr>
<th>Dimensions</th>
<th>Performance</th>
<th>Best competitor</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shopping</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Accommodation</td>
<td></td>
<td>Wales</td>
</tr>
<tr>
<td>Eating out</td>
<td></td>
<td>Scotland</td>
</tr>
<tr>
<td>Transportation - getting to and from the destination</td>
<td></td>
<td>Lake District</td>
</tr>
<tr>
<td>Evening activities</td>
<td></td>
<td>Scotland</td>
</tr>
<tr>
<td>Tourist information</td>
<td></td>
<td>Scotland</td>
</tr>
<tr>
<td>Things to see and do</td>
<td></td>
<td>Wales</td>
</tr>
<tr>
<td>Transportation - getting around whilst in the destination</td>
<td></td>
<td>Scotland</td>
</tr>
<tr>
<td>Overall value for money</td>
<td></td>
<td>Scotland</td>
</tr>
</tbody>
</table>

Q020. Please tell me which destinations you feel deliver an excellent performance on the following aspects? You can choose as many or as few destinations as you like.

Base: Visitors with long-standing disability or impairment (188)
Summary of strengths and weaknesses

Despite things to see and do and transportation in Jersey gaining some excellent ratings from disabled and impaired visitors, there were certain aspects of these areas that are performing below average and are considered a weakness. So fine tuning the smaller details is a good way to maintain overall strong performances.

<table>
<thead>
<tr>
<th>Accommodation</th>
<th>Strengths</th>
<th>Weaknesses</th>
</tr>
</thead>
<tbody>
<tr>
<td>▲</td>
<td>Quality of accommodation</td>
<td>▼ Frequency of public transport services</td>
</tr>
<tr>
<td>▲</td>
<td>Helpfulness and friendliness of staff at accommodation</td>
<td>▼ Prevalence and clarity of pedestrian signage</td>
</tr>
<tr>
<td>▼</td>
<td>Value for money of accommodation</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Transportation getting around Jersey</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>▲</td>
<td>Variety of transportation</td>
<td>▼ Value for money/cost of things to see and do</td>
</tr>
<tr>
<td>▼</td>
<td>Taxi services</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Things to see and do</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>▲</td>
<td>Range of things to see and do</td>
<td></td>
</tr>
<tr>
<td>▲</td>
<td>Quality of experience provided at attractions and/or when taking part in activities</td>
<td></td>
</tr>
<tr>
<td>▲</td>
<td>Helpfulness and friendliness of staff when visiting attractions and/or taking part in activities</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Tourist information</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>▲</td>
<td>Quality of information provided</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Shopping</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>▼</td>
<td>Range of shops available</td>
<td></td>
</tr>
<tr>
<td>▲</td>
<td>Quality of merchandise available in shops</td>
<td></td>
</tr>
<tr>
<td>▲</td>
<td>Helpfulness and friendliness of staff in shops</td>
<td></td>
</tr>
</tbody>
</table>

How would you rate Jersey's performance using the following scale: [Excellent; Very good; Good; Fair; Poor]
Improving the Visitor Experience