

Exit Survey Headline Analysis – full-year 2019

Key full-year metrics

- Visitors spent £279.8m while in Jersey during 2019, representing a before-inflation annual increase of 4%
- The number of visits reached 770,700, which was 6% more than in 2018
- The number of nights spent on the island by visitors stood at 2.74 million, 1% above 2018 figures
- Among those staying at least one night the average length of stay was 4.2 nights, down from 4.4 nights in 2018
- The number of overnight Holiday visits reached 439,200, this being an annual increase of 6%
- Total visitor nights by those choosing Jersey for a Holiday stood at 1.92 million, or 2% up on the year before
- Average trip duration for overnight Holiday visitors of 4.4 was marginally lower than the 4.5 seen in 2018
- Among Holiday visitors the Net Promoter Score for 2019 was 58, three points higher than the 55 seen in 2018
- 50% of Holiday visitors to Jersey were experiencing the island for the first time, marginally higher than 48% in 2018
- The majority (69%) of visitors travel to/from Jersey by scheduled air

Visitor spending

During Q4 visitors spent £39.2m in Jersey, 15% less in nominal terms than in Q4 of 2018, although still 31% higher than that achieved in the final quarter of 2017, suggesting that the 2018 figure may have been exceptional. Across 2019 visitors spent £279.8m in Jersey, this being 4% up on the year before in nominal terms.

In the final three months of 2019 the typical visit generated spending of £315 with an average nightly spend of £99. The equivalent figures for full-year 2019 are £363 and £102 respectively, representing a nominal year-on-year decline in spend per visit of 2% and increase in spend per night of 4%.

Note that all spend figures exclude the cost of travel to/from Jersey.

Overall visits and visitor nights

In the month of December there were 31,300 visits generating 96,100 visitor nights, with these figures representing a 10% decline in visits and 13% drop in visitor nights compared with December 2018. Taking the longer view for the three months to December the volume of visits was 6% lower than the year before whereas visitor nights declined by 13% compared with same three months a year earlier.

Taking a full twelve-month view, the number of visits in 2019 reached 770,700 and visitor nights stood at 2.74m, representing increases of 6% and 1% respectively.

This is the highest volume of visits to Jersey since 2003.

Journey purpose

The number of 'Holiday' visits to Jersey during December was 14% down when we include both overnight and day-trip visits, but focussing just on overnight Holiday visits the decline was somewhat less sharp at 6%.

In Q4 overall Holiday visits were 2% down but overnight visits fell by 5%. This situation arose thanks to a stronger day-trip performance in the first part of the quarter. Overall in 2019 514,600 Holiday visits took place, of which 439,200 lasted at least one night. This means that there was a 7% increase in Holiday visits in 2019, with the equivalent figure for overnight Holiday trips being 6%. The annual tally for day-trip Holiday visits of 75,500 was 14% ahead of the situation the year before.

Changes in survey methodology during 2016 means that there is no exact like-for-like comparison for the previously reported measure of “Staying Leisure Visits” which was a function of data obtained through Visitor Registration Cards. However, the nearest equivalent is the Exit Survey estimate for overnight Holiday visits and on this basis the 2019 figure is the highest since 2002.

Holidays account for the bulk of visits to Jersey (67%), but during 2019 there was differing performances across other journey purpose categories with Business visits declining 14% but Visits to Friends and Relatives up 5% and ‘Other’ types of trip up 27%.

Source markets

Over the three months October to December the number of visits from the UK, which is by far the largest source market for Jersey, was down 3% compared with the same period of 2018. The number of visits from France was 4% up thanks to a strong early part of this quarter, while visits from Guernsey declined by 17%.

Despite a deterioration across the past three months, strong figures earlier in the year means that taking a look at the full-year picture reveals an uplift of 8% in the number of visits to Jersey from Guernsey, with a very similar situation for visits from the UK which increased by 7% to 494,000.

The French market is second to the UK in terms of visits, and across 2019 this market grew by 4% to 135,600 however with much of this growth accounted for by a bounce-back in the day-trip market looking at the number of nights spent in Jersey by visitors from France we find a drop of 24%.

Slightly fewer than 21,000 visits from Germany took place during 2019, this being 6% more than the year before, but a reduction in length of stay resulted in the number of visitor nights from this market witnessing a drop of 17%.

It was a less robust year in terms of visits and visitor nights from Ireland with both metrics seeing a 19% reduction.

Mode of travel

More than two-thirds, 69%, of all visits during 2019 were by those who travelled on a scheduled flight, marginally up from 67% for 2018. Despite a decline during the final quarter of the year the volume of visits by this mode was estimated to be 9% higher than was the case in the previous year.

There has been considerable variation in the year-on-year performance of scheduled ferry services in terms of the volume of visits during the course of 2019, but the full-year analysis shows a tally of 208,400 which is 1% higher than the year before.

The number of visiting yachtsmen declined 6%, while the number of cruise ship visitors fell by almost one-fifth compared to the year before. There was no change in the estimated number of visitors who travelled by private plane.

Those with a mode of travel being scheduled air tend to stay (on average) twice as long as those travelling by scheduled ferry.

Length of stay

During 2019 16% of visits have been day-trips, which is marginally up on 15% the year before.

Another segment to see an increase in its relative share of the market is trips lasting 1-3 nights which accounted for 41% in 2019 compared with 40% in 2018. In each of the past two years 24% of all visits have lasted between 4 and 6 nights and 14% exactly 7 nights. The proportion of trips lasting eight or more nights has seen a small reduction.

Day-trip visits overall in 2019 enjoyed a 16% increase, while 'short-break' stays of between one and three nights were up 8%. The volume of visits lasting precisely one-week are up 6% in 2019, as were trips with a duration of between four and six nights.

In 2019 the typical overnight Holiday trip lasted 4.4 nights, overnight Business visit 2.8 nights, overnight VFR visit 4.9 nights and overnight visits for other reasons (for example sporting events or a school/study trip) 3.0 nights.

Each journey purpose segment saw a lower trip duration in 2019 than was the case in 2018.

First time versus repeat visits

Looking across all types of journey purpose 41% of those travelling to Jersey during 2019 were encountering the island for the first time, compared with 39% for the equivalent period of 2018. However, the aggregate situation is impacted by regular Business or VFR visitors and when looking solely at visits that were for a Holiday the proportion that were first-time visitors in 2019 stood at 50%, not markedly different from the situation in 2018 at 48%.

Net Promoter Score

In the three months to December the NPS stood at 56, down from 61 in the same quarter of 2018. However, thanks to increases in this measure earlier in the year the annual picture is one of a NPS score of 58, up from 55 in 2018.

Note that an NPS score sits between -100 and +100 – the higher the score the larger is the proportion of 'promoters' in comparison with the proportion of 'detractors'.

Ratings

As in previous years, when asked to rate different aspects of their Jersey experience on a scale from 1 being "Very Poor" to 5 being "Excellent" Jersey performed well. The variance seen in earlier years persisted into 2019 with the highest ratings being achieved for Beaches / Countryside, Cleanliness and Safety. The weakest scores were for Shops / Retail and Value for Money.

Accommodation

Most visits to Jersey that include an overnight stay on the island are in an Hotel, with 467,000 such visits in 2019. As might be expected, when visiting friends and relatives these are often the visitor's host, and in total 80,700 visits in 2019 entailed staying with those that were being visited. For the first time the Exit Survey explicitly asked about AirBnB as a form of accommodation, revealing that 9,500 visits used this option during the year.

Self-catering accommodation was used for 26,900 visits, a Guest House for 16,200, campsites for 6,400 and a hostel for 5,300.

The average length of stay for Hotels is 3.9 nights, which is lower than Self-Catering at 6.6, Guest House at 5.1 and Camping at 7.1, but higher than the figure for Hostels at 2.3. Those choosing AirBnB had an average trip duration of 4.3 nights during 2019.

Detailed volume data

The table overleaf presents a range of metrics for December 2019, the past three months, the year-to-date and for the most recent rolling twelve months, with on this occasion these two blocks of data clearly being identical as each relates to the period January to December 2019. As is always the case the longer the time period reviewed the more reliable are the estimates.

		Dec-19		Oct-Dec 19			Year-to-date				Rolling 12 months							
		Visits	Nights	Visits	Spend (£m)	Nights	Nights per Visit	Visits	Spend (£m)	Nights	Nights per Visit	Visits	Spend (£m)	Nights	Nights per Visit	Visits Trend	Nights Trend	
Headlines	Total Market	31,255	96,116	124,199	£39.2	395,183		770,686	£279.8	2,737,631		770,686	£279.8	2,737,631				
	annual change	-10%	-13%	-6%	-15%	-13%		6%	4%	1%		6%	4%	1%				
	Overnight Visits	28,629		111,056			3.6	645,547			4.2	645,547			4.2			
	annual change	-4%		-8%				5%				5%						
Purpose of Visit	Holiday (Total)	12,635	31,815	70,545		229,013		514,618		1,918,283		514,618		1,918,283				
	annual change	-14%	-16%	-2%		-5%		7%		2%		7%		2%				
		Holiday (Day-Trippers)	1,124		7,572				75,467				75,467					
	annual change	-54%		29%				14%				14%						
		Holiday (Overnight Visits)	11,511	31,815	62,973		229,013	3.6	439,151		1,918,283	4.4	439,151		1,918,283	4.4		
	annual change	-6%	-16%	-5%		-5%		6%		2%		6%		2%				
		Business (Total)	4,797	16,264	16,782		36,331		66,106		138,813		66,106		138,813			
	annual change	-11%	23%	-22%		-36%		-14%		-20%		-14%		-20%				
		Business (Day-Trippers)	868		3,941				16,059				16,059					
	annual change	-48%		-15%				-18%				-18%						
		Business (Overnight Visits)	3,929	16,264	12,841		36,331	2.8	50,047		138,813	2.8	50,047		138,813	2.8		
	annual change	5%	23%	-24%		-36%		-13%		-20%		-13%		-20%				
		VFR (Total)	9,613	39,927	24,889		102,032		112,947		544,557		112,947		544,557			
	annual change	-16%	-23%	-10%		-17%		5%		4%		5%		4%				
		VFR (Day-Trippers)	164		477				2,217				2,217					
	annual change	-16%		-38%				27%				27%						
		VFR (Overnight Visits)	9,450	39,927	24,412		102,032	4.2	110,730		544,557	4.9	110,730		544,557	4.9		
	annual change	-16%	-23%	-9%		-17%		5%		4%		5%		4%				
	Other, including Study (Total)	4,210	8,109	11,984		27,806		77,015		135,978		77,015		135,978				
annual change	31%	11%	7%		-11%		27%		-9%		27%		-9%					
	Other (Day-Trippers)	471		1,154				31,395				31,395						
annual change	1%		8%				55%				55%							
	Other (Overnight Visits)	3,739	8,109	10,830		27,806	2.6	45,619		135,978	3.0	45,619		135,978	3.0			
annual change	36%	11%	7%		-11%		13%		-9%		13%		-9%					

		Dec-19		Oct-Dec 19			Year-to-date				Rolling 12 months							
		Visits	Nights	Visits	Spend (£m)	Nights	Nights per Visit	Visits	Spend (£m)	Nights	Nights per Visit	Visits	Spend (£m)	Nights	Nights per Visit	Visits Trend	Nights Trend	
Country of Residence	UK	21,793	70,604	90,087		321,200	3.6	493,986		2,146,873	4.3	493,986		2,146,873	4.3			
	annual change	-5%	-15%	-3%		-8%		7%		4%		7%		4%				
	France	4,270	9,733	15,613		22,701	1.5	135,552		138,942	1.0	135,552		138,942	1.0			
	annual change	-21%	74%	4%		-4%		4%		-24%		4%		-24%				
	Germany	21	54	1,287		5,062	3.9	20,951		95,748	4.6	20,951		95,748	4.6			
	annual change	-38%	-42%	-8%		-12%		6%		-17%		6%		-17%				
Guernsey	4,004	6,984	12,436		21,667	1.7	59,741		94,488	1.6	59,741		94,488	1.6				
annual change	1%	-14%	-17%		-12%		8%		14%		8%		14%					
Ireland	111	579	512		2,674	5.2	8,249		45,896	5.6	8,249		45,896	5.6				
annual change	18%	-30%	-73%		-71%		-19%		-19%		-19%		-19%					
Mode of Departure	Scheduled Ferry	4,985	13,916	21,374		48,051	2.2	208,360		444,022	2.1	208,360		444,022	2.1			
	annual change	-25%	5%	-5%		-22%		1%		-24%		1%		-24%				
	Visiting Yachtsmen	60	108	578		901	1.6	18,584		43,369	2.3	18,584		43,369	2.3			
	annual change	-28%	-74%	-21%		-51%		-6%		9%		-6%		9%				
	Cruise	-	-	-		-	-	-	3,625		-	-	3,625		-	-		
	annual change	-	-	-		-	-	-	-19%		-	-	-19%		-	-		
Scheduled Air	25,878	81,759	101,186		345,170	3.4	534,639		2,244,763	4.2	534,639		2,244,763	4.2				
annual change	-6%	-15%	-6%		-11%		9%		7%		9%		7%					
Private Plane	333	333	1,061		1,061	1.0	5,478		5,478	1.0	5,478		5,478	1.0				
annual change	-10%	-10%	-16%		-16%		0%		0%		0%		0%					
Duration of Stay	Day Visit	2,626	-	13,144		-	-	125,139		-	-	125,139		-	-			
	annual change	-45%		7%				16%			16%							
	1-3 nights	19,857	40,213	70,036		156,948	2.2	312,132		697,205	2.2	312,132		697,205	2.2			
	annual change	0%	-5%	-4%		-1%		8%		10%		8%		10%				
	4-6 nights	5,630	25,316	28,300		128,106	4.5	188,070		851,587	4.5	188,070		851,587	4.5			
	annual change	5%	5%	-8%		-5%		6%		8%		6%		8%				
7 nights	1,369	9,569	8,423		58,887		105,627		726,587		105,627		726,587					
annual change	-36%	-36%	0%		1%		6%		7%		6%		7%					
8+ nights	1,773	21,018	4,297		51,242	11.9	39,719		462,252	11.6	39,719		462,252	11.6				
annual change	-27%	-27%	-49%		-50%		-21%		-26%		-21%		-26%					