

Exit Survey Analysis – first six months of 2019

June

- 81,300 visits generated 317,500 visitor nights, 5% down and unchanged on June of 2018

Quarter 2 April to June

- Visits 6% up and visitor nights 7% up
- Visitors spent £84.9m, 13% more in nominal terms than in Q2 of 2018
- Average nightly spend of £107 (first half of 2019 £104), representing a nominal growth in spend per night of 5%

Year to date Jan to June

- 327,000 visits generated 1.07m visitor nights
- Average length of stay (staying at least one night) was 3.9, down from 4.1 in the first half of 2018
- Year-on-year change across the first half of 2019 is 11% growth in visits and 7% growth in visitor nights
- Spend per visit of £366 (first half of 2019 £340), representing a nominal growth in spend per visit of 2%
- First six months of 2019 spending of £111m, 12% above the same stage of last year

Rolling 12 months

- Visitor spend at June 2019 was £280.6m, 15% ahead of the previous year
- Visits of 757,000 and visitor nights at 2.79m, representing increases of 10% and 4% respectively

Journey purpose

The number of 'Holiday' visits to Jersey during June was unchanged when we include both overnight and day-trip visits, but witnessed a marginal 1% annual increase when just focussing on overnight visits, as day-trip visits that the respondent described as a 'Holiday' fell 3%. In Q2 overall Holiday visits were 7% up but overnight visits jumped 10% with day-trip Holiday visits declining by 12%. So far in 2019 almost 202,000 Holiday visits took place, of which 180,000 lasted at least one night. This means that there has been a 13% increase in Holiday visits in the first half of the year, with this figure improving to 17% when focussing just on overnight Holiday visits. Holidays account for the bulk of visits to Jersey, but during the first half of the year there was differing performances across other journey purpose categories with Business visits declining 5% but visits to friends and relatives up 15% and 'Other' types of trip up 8%.

Source markets

So far in 2019 two-thirds of all visits have been by residents of the UK, 16% from France and 10% from Guernsey. The UK and Germany are both up 15%, Ireland up 23% and Guernsey up 48%. However due to a poor Q2 and in particular, June, the visits from France is 18% lower than in the first half of last year.

Mode of travel

Almost three-quarters of all visits during the first six months were on a scheduled flight, up from two-thirds for the same period of 2018. The reason for this is that in the period January to June the number of visits by scheduled flight is estimated to be 23% up on last year whereas visits by scheduled ferry are 16% down. Cruise passengers has seen a 26% drop in the first half of the year, but there is a strong prospect of improvement during the remainder of the season.

Length of stay

In the first half of the year 16% of visits have been day-trips, 45% trips that last 1-3 nights, 24% lasting 4-6 nights, 11% an exact week and the remaining 4% 8 or more nights. Day-trip visits overall have seen a 1% fall, and similarly at the other end of the spectrum visits lasting 8 or more nights have fallen 3%. All other length of stay categories are up, but not by a uniform amount, with trips of 4-6 and 7 night duration increasing by 5% while mirroring the global trend short-break stays are seeing the strongest growth, with a jump of 23% so far in 2019.

In the first half of the year the typical overnight Holiday lasted 4.0 nights, down from 4.3 nights a year earlier.

First time versus repeat visits

Looking across all types of journey purpose 40% of those travelling to Jersey during the first half of the year were encountering the island for the first time, but when looking solely at visits that were for a Holiday the proportion stood at 50%, not markedly different from the situation at the same stage of 2018.

Net Promoter Score

In the three months to June the NPS stood at 61, up from 52 in the same quarter of 2018.

Detailed volume data

The table below presents a range of metrics for June 2019, the past three months, the year-to-date and for the most recent rolling twelve months. As is always the case, the longer the time period reviewed the more reliable are the estimates.

		Jun-19		Apr-Jun 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	81,301	317,535	231,879	£84.9	796,587		326,793	£111.0	1,068,030		756,904	£280.6	2,788,946				
	annual change	-5%	0%	6%	13%	7%		11%	12%	7%		10%	15%	4%				
	Overnight Visits	68,552		189,857			4.2	274,399			3.9	649,899			4.3			
	annual change	1%		9%				13%				12%						
Purpose of Visit	Holiday (Total)	57,327	253,493	157,649		602,546		201,948		728,951		504,096		1,939,470				
	annual change	0%	-2%	7%		8%		13%		10%		9%		5%				
		Holiday (Day-Trippers)	5,806		19,884				21,639				63,507					
		annual change	-3%		-12%				-11%				-9%					
		Holiday (Overnight Visits)	51,521	253,493	137,765		602,546	4.4	180,309		728,951	4.0	440,589		1,939,470	4.4		
		annual change	1%	-2%	10%		8%		17%		10%		12%		5%			
		Business (Total)	6,078	10,061	15,512		33,682		34,828		74,044		73,998		170,054			
		annual change	10%	33%	-7%		-2%		-7%		-3%		-5%		-20%			
		Business (Day-Trippers)	1,801		4,350				9,408				17,940					
		annual change	-2%		-15%				-14%				-18%					
		Business (Overnight Visits)	4,277	10,061	11,162		33,682	3.0	25,420		74,044	2.9	56,058		170,054	3.0		
		annual change	16%	33%	-4%		-2%		-5%		-3%		1%		-20%			
		VFR (Total)	9,828	48,829	27,764		127,983		46,419		216,249		113,588		550,323			
		annual change	10%	13%	16%		13%		16%		14%		20%		11%			
		VFR (Day-Trippers)	102		739				1,336				2,506					
		annual change	9%		98%				130%				95%					
	VFR (Overnight Visits)	9,726	48,829	27,025		127,983	4.7	45,083		216,249	4.8	111,083		550,323	5.0			
	annual change	10%	13%	15%		13%		15%		14%		19%		11%				
	Other, including Study (Total)	8,068	5,151	30,954		32,375		43,598		48,787		65,221		129,099				
	annual change	-42%	-42%	4%		-15%		12%		-29%		19%		5%				
	Other (Day-Trippers)	5,040		17,049				20,012				23,052						
	annual change	-46%		4%				16%				22%						
	Other (Overnight Visits)	3,028	5,151	13,905		32,375	2.3	23,586		48,787	2.1	42,169		129,099	3.1			
	annual change	-33%	-42%	4%		-15%		8%		-29%		17%						

		Jun-19		Apr-Jun 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	54,975	256,518	146,255		624,352	4.3	214,644		841,929	3.9	491,759		2,138,223	4.3			
	annual change	2%	0%	11%		10%		15%		11%		8%		2%				
	France	11,386	8,945	44,391		36,499	0.8	50,988		43,456	0.9	118,964		143,526	1.2			
	annual change	-42%	-48%	-14%		-32%		-18%		-48%		-8%		-18%				
	Germany	3,568	20,855	7,950		42,472	5.3	8,094		43,056	5.3	20,741		117,601	5.7			
	annual change	46%	33%	21%		11%		15%		6%		10%		11%				
Guernsey	6,065	5,317	15,651		22,406	1.4	31,111		45,304	1.5	65,154		104,429	1.6				
annual change	35%	-12%	11%		48%		48%		92%		66%		91%					
Ireland	1,026	5,181	2,628		12,377	4.7	3,181		14,298	4.5	10,715		56,985	5.3				
annual change	22%	33%	34%		15%		23%		2%		45%		51%					
Mode of Departure	Scheduled Ferry	18,788	40,088	63,962		113,722	1.8	75,452		138,369	1.8	192,663		513,008	2.7			
	annual change	-31%	-24%	-14%		-26%		-16%		-33%		-3%		-4%				
	Visiting Yachtsmen	2,932	7,466	6,031		14,170	2.3	6,321		14,702	2.3	19,859		42,478	2.1			
	annual change	8%	28%	0%		23%		1%		23%		18%		9%				
	Cruise	-	-	1,174		-	-	-	1,174		-	-	4,093		-	-		
	annual change	-100%		-26%				-26%				11%						
Scheduled Air	59,025	269,424	159,141		667,124	4.2	241,151		912,264	3.8	534,444		2,227,615	4.2				
annual change	8%	4%	18%		16%		23%		17%		14%		6%					
Private Plane	557	557	1,572		1,572	1.0	2,696		2,696	1.0	5,845		5,845	1.0				
annual change	-2%	-2%	0%		0%		16%		16%		46%		46%					
Duration of Stay	Day Visit	12,750	-	42,022		-	-	52,394		-	-	107,005		-	-			
	annual change	-26%		-5%				-1%				-4%						
	1-3 nights	26,152	61,005	87,290		206,199	2.4	147,587		324,892	2.2	317,398		687,546	2.2			
	annual change	-2%	4%	8%		12%		23%		21%		30%		28%				
	4-6 nights	22,778	102,565	63,674		284,062	4.5	79,676		355,053	4.5	180,624		805,795	4.5			
	annual change	10%	9%	18%		17%		5%		6%		-4%		-5%				
7 nights	15,425	106,002	30,411		209,279		34,347		236,683		101,767		693,846					
annual change	-3%	-3%	3%		4%		5%		6%		-2%		-2%					
8+ nights	4,197	47,963	8,483		97,047	11.4	12,789		151,403	11.8	50,111		601,759	12.0				
annual change	-13%	-15%	-11%		-15%		-3%		-11%		14%		3%					