

Exit Survey Analysis – March 2019 and Year-to-Date

In the first quarter of 2019 departing Holiday visitors gave Jersey a Net Promoter Score of 55, one point higher than for the same period of 2018 and mirrors the overall average score achieved during 2018.

Visitors spent an estimated £26m in Jersey during the three months ending March 2019, a 12% annual jump in nominal terms. Across the past twelve months visitor spending rose by 9% to £271m.

There are some seasonal variations as well as 'one-off' factors that impact the data, notably the early Easter of 2018 will have boosted longer-stay visits, while the March just gone saw weather that was far kinder than that experienced twelve months before, resulting in less transport disruption. On the downside though uncertainties regarding whether or not the UK would leave the European Union at the end of March may well have resulted in some changes to travel behaviour.

Overall March saw the island welcome just over 42,000 visits, an impressive 24% up on the same period in 2018, whereas the number of visitor nights actually declined by 8% to 107,000.

This means that in the first three months of 2019 Jersey had almost 95,000 visits generating 271,000 visitor nights, with this representing annual increases of 23% and 6% respectively.

To put figures for the first three months of the year into context, in 2018 this period accounted for just 11% of annual visits, 9% of annual visitor nights and of visitor spending.

The number of overnight Holiday visits in March was one-third up on a year ago, however, Holiday visitor nights were little changed. As one would expect the absence of Easter meant for a reduced length of stay for VFR trips as well as for Holiday trips with the former seeing a 17% rise in visits but 14% decline in visitor nights.

So far in 2019 the number of overnight Holiday visits is estimated to be 46% higher than in the equivalent period of last year, while the number of Holiday visitor nights in Jersey is estimated to be up by a more modest 20%.

Looking at source markets reveals growth from the UK and Guernsey but a very weak month when it comes to visits from France – not surprising given the Easter effect that would have influenced leisure visits from this market in 2018.

During the first quarter 72% of all visits were made by residents of the UK, with Guernsey the next most sizeable contingent with a 16% share.

The timing of Easter also explains why the volume of visits, and especially visitor nights, by Scheduled Ferry were considerably lower in March of 2019 compared to a year before. The volume of visits by Scheduled Air continues to increase, with this method of transport accounting for 86% of all visits in the first quarter of the year.

While short-break visits were strongly up on the previous year, the volume of visits lasting four or more nights was notably lower, again likely due to the absence of Easter travel in the 2019 figures.

Across all trip purposes 37% of visits in March were by those encountering Jersey for the first time. This figure increases marginally to 41% when looking solely at Holiday visits.

The table overleaf presents a range of metrics for March 2019, the past three months (which of course on this occasion is identical to the year-to-date figures) 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.

		Mar-19		Jan-Mar 19			Year-to-date			Rolling 12 months						
		Visits	Nights	Visits	Nights	Nights per Visit	Visits	Nights	Nights per Visit	Visits	Spend (£m)	Nights	Nights per Visit	Visits Trend	Nights Trend	Spend Trend
Headlines	Total Market	42,073	107,007	94,911	271,438		94,911	271,438		743,113	£271.1	2,734,879				
	annual change	24%	-8%	23%	6%		23%	6%		6%	9%	-2%				
	Overnight Visits	36,961		84,539		3.2	84,539		3.2	633,663		4.3				
	annual change	21%		23%			23%			6%						
Purpose of Visit	Holiday (Total)	22,866	59,368	44,297	126,401		44,297	126,401		494,199		1,894,048				
	annual change	30%	0%	43%	20%		43%	20%		3%		-2%				
	Holiday (Day-Trippers)	1,191		1,776			1,776			66,222						
	annual change	-2%		0%			0%			-9%						
	Holiday (Overnight Visits)	21,675	59,368	42,521	126,401	3.0	42,521	126,401	3.0	427,977		1,894,048	4.4			
	annual change	33%	0%	46%	20%		46%	20%		5%		-2%				
	Business (Total)	5,949	17,452	19,316	40,361		19,316	40,361		75,199		170,848				
	annual change	9%	43%	-8%	-4%		-8%	-4%		-6%		-27%				
	Business (Day-Trippers)	1,243		5,080			5,080			18,701						
	annual change	-11%		-13%			-13%			-5%						
	Business (Overnight Visits)	4,706	17,452	14,236	40,361	2.8	14,236	40,361	2.8	56,498		170,848	3.0			
	annual change	16%	43%	-5%	-4%		-5%	-4%		-7%		-27%				
	VFR (Total)	5,909	20,463	18,654	88,264		18,654	88,264		109,660		535,173				
	annual change	17%	-14%	16%	14%		16%	14%		8%		2%				
	VFR (Day-Trippers)	150		600			600			2,142						
	annual change	10%		189%			189%			121%						
VFR (Overnight Visits)	5,759	20,463	18,054	88,264	4.9	18,054	88,264	4.9	107,518		535,173	5.0				
annual change	17%	-14%	14%	14%		14%	14%		7%		2%					
Other, including Study (Total)	7,349	9,724	12,644	16,412		12,644	16,412		64,055		134,810					
annual change	25%	-53%	37%	-47%		37%	-47%		60%		25%					
Other (Day-Trippers)	2,529		2,917			2,917			22,384							
annual change	344%		248%			248%			122%							
Other (Overnight Visits)	4,821	9,724	9,727	16,412	1.7	9,727	16,412	1.7	41,670		134,810	3.2				
annual change	-9%	-53%	16%	-47%		16%	-47%		40%							

		Mar-19		Jan-Mar 19			Year-to-date			Rolling 12 months						
		Visits	Nights	Visits	Nights	Nights per Visit	Visits	Nights	Nights per Visit	Visits	Spend (£m)	Nights	Nights per Visit	Visits Trend	Nights Trend	
																annual change
Country of Residence	UK	29,431	85,431	68,388	217,574	3.2	68,388	217,574	3.2	477,622		2,079,885	4.4			
	annual change	42%	6%	26%	13%		26%	13%		3%		-4%				
	France	5,094	3,575	6,597	6,958	1.1	6,597	6,958	1.1	126,042		161,062	1.3			
	annual change	-38%	-84%	-37%	-76%		-37%	-76%		3%		0%				
	Germany	69	321	144	584	4.1	144	584	4.1	19,379		113,559	5.9			
annual change	-79%	-81%	-68%	-72%		-68%	-72%		2%		14%					
Guernsey	5,998	9,693	15,457	22,895	1.5	15,457	22,895	1.5	63,618		97,163	1.5				
annual change	116%	193%	122%	169%		122%	169%		67%		45%					
Ireland	340	1,099	552	1,922	3.5	552	1,922	3.5	10,055		55,388	5.5				
annual change	21%	-3%	-11%	-42%		-11%	-42%		18%		37%					
Mode of Departure	Scheduled Ferry	7,115	10,147	11,487	24,641	2.1	11,487	24,641	2.1	202,938		552,003	2.7			
	annual change	-30%	-65%	-24%	-54%		-24%	-54%		-1%		2%				
	Visiting Yachtsmen	170	316	290	532	1.8	290	532	1.8	19,836		39,871	2.0			
	annual change	-19%	2%	18%	49%		18%	49%		15%		0%				
	Cruise	-	-	-	-		-	-		4,503		-				
annual change									30%							
Scheduled Air	34,360	96,116	82,010	245,140	3.0	82,010	245,140	3.0	509,989		2,137,158	4.2				
annual change	48%	11%	34%	22%		34%	22%		-1%		-4%					
Private Plane	428	428	1,124	1,124	1.0	1,124	1,124	1.0	5,847		5,847	1.0				
annual change	15%	15%	51%	51%		51%	51%		79%		90%					
Duration of Stay	Day Visit	5,113	-	10,373	-		10,373	-		109,450		-				
	annual change	54%		20%			20%			6%						
	1-3 nights	28,650	57,182	60,295	118,688	2.0	60,295	118,688	2.0	310,756		665,002	2.1			
	annual change	85%	60%	52%	39%		52%	39%		26%		20%				
	4-6 nights	5,927	25,371	16,002	70,991	4.4	16,002	70,991	4.4	170,917		764,024	4.5			
annual change	-52%	-51%	-28%	-24%		-28%	-24%		-17%		-18%					
7 nights	1,224	8,445	3,936	27,404		3,936	27,404		100,803		686,429					
annual change	-29%	-29%	26%	28%		26%	28%		-3%		-4%					
8+ nights	1,159	16,010	4,306	54,355	12.6	4,306	54,355	12.6	51,188		619,424	12.1				
annual change	0%	-5%	20%	-2%		20%	-2%		16%		2%					