Jersey Travel Survey
January to March 2020

Statistics Jersey: www.gov.je/statistics

Context: COVID-19

This report covers January to March 2020 during which travel restrictions from mid-March were introduced in response to the COVID-19 pandemic by Jersey, as well as other jurisdictions which have travel routes serving the Island. The airline FlyBE also entered into administration in early March with a resultant impact on many of Jersey's regional air connections.

Employment guidelines led to a sudden cessation of the Travel Survey fieldwork on Saturday 14th March, meaning that a full month of data has not been applied to the monthly passenger figures for March. However, an analysis of daily scheduled passenger departures shows that 83% of the total monthly passengers departing by air and sea in March were accounted for by the 14th March with passenger numbers declining very quickly over the final two weeks of the month. Nevertheless, the total number of completed surveys over the first two weeks of March were small for some of the individual routes and contained some sampling bias due to the interview shift planning methodology being based upon a full month. Imputed data has been used for routes where sample sizes achieved over the first two weeks of March were insufficiently robust.

The figures within this report should therefore be treated as best estimates based upon the data available due to the early cessation of the fieldwork. Please also refer to the notes within the section on statistical reliability within the appendices when interpreting the data.

Summary

Year-to-date, to the end of March 2020:

- there was a total of 136,080 **departing passengers** which was 23.8% lower than over the same period in 2019

- total **tourism visits** decreased by 35.3% to 61,380, which was also lower than the previous 3-year average of 84,080

- the total number of **overnight stays** decreased by 19.5% to 218,440 nights and was also lower than the previous 3-year average of 282,820

- total **on-Island visitor expenditure** decreased by 38.1% to £16.15 million. In real terms, applying the March RPI, visitor expenditure has decreased by 39.7% compared to 2019 and by 32.3% compared to the previous 3-year average.

- on-Island **spend per visit** was £263 and **spend per visitor night** was £74.

- for those travelling independently where travel can be costed separately to other elements of a visit to Jersey, the **average return fare per person** was £104.

- satisfaction ratings with various Jersey attributes have all improved or remained at the same level as in 2019, with the likelihood to revisit also showing the best result over the past 4 years.

- the **Net Promoter Score** of 60 for holiday visitors has also shown the best result over the first quarter for the past 4 years and has increased from 55 over the same period in 2019.

- breaking the visitor numbers down by **travel method:**
  - visits on the **scheduled air** routes decreased by 33.8% to 54,330
  - visits on the **scheduled ferry** services decreased by 47.2% to 6,070

- breaking the visitor numbers down by **main purpose of visit**:
  - **holiday** visits decreased by 55.6% to 19,650
  - **business** visits increased by 3.8% to 20,050
  - **visits to friends and family** decreased by 8.4% to 17,090
  - **visits for other purposes** decreased by 63.8% to 4,580

- breaking the visitor numbers down by **country of residence**:
  - visits from the **UK** decreased by 29.1% to 48,510
  - visits from the **other Channel Islands[1]** decreased by 61.1% to 6,020
  - visits from other smaller markets decreased by 38.1% to 6,850
  - over 50% of UK visitors came from the Greater London and South East regions

- additional **visitor profile information:**
  - males and females accounted for an equal proportion of visitors interviewed (both 50%)
  - 16% of visitors were travelling with children under the age of 16
  - just under half of adult visitors were aged 55 or over
  - 28% were visiting Jersey for the first time

- how **bookings** were made:
  - 17% were on an inclusive package where a single price was paid for travel and accommodation
  - nearly three-quarters of inclusive package visits were booked online
  - 68% of package visits were booked through a travel agent or tour operator
  - for independent bookings, 80% booked their accommodation and 94% booked their travel online

- type of **accommodation** stayed in and **activities** undertaken:
  - overall, 78% of staying visitors stayed in commercial accommodation with 72% staying in hotels
  - 41% of visitors participated in "non-essential" shopping as part of their visit experience
  - 30% took a self-guided walk along a coastal or inland footpath
  - 25% used the public bus service
  - 21% visited a paid visitor attraction

- The visit experience, including **satisfaction ratings, likelihood to revisit** and **Net Promoter Score**:
  - all ratings for various attributes of a Jersey visit have either improved or remained at the same level
  - the average rating out of 5 for Jersey in general was 4.6
  - as with previous years the lowest rating at 3.8 was for Jersey's value for money
  - 79% of visitors said that they would be likely to return within the next 2 years, with a further 17% saying they may return at some point in the future
  - The **Net Promoter Score** of 60 was the highest seen in the first quarter over the past 4 years

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[1] Within the report "Other Channel Islands (CI)" refers to Guernsey and the other smaller islands within its Bailiwick.

Passenger departures

Table 1 shows the volumes of departing passengers by air and sea on the main consolidated routes from Jersey. In order to determine the overall breakdown of visitors to Jersey, passenger departure figures for each individual route are used to weight the Passenger Exit Survey sample data.

Cumulatively to the end of March, total passenger departures showed a decrease of 23.8% compared to 2019, with a 20.2% decrease in total scheduled air passengers and a larger 47.5% decrease in passengers on the scheduled ferry routes.

Table 1 – Breakdown of passenger departures, 2019 - 2020

	Volumes			Volumes		
	January 2020	February 2020	March 2020	Jan-Mar 2019	Jan-Mar 2020	Overall change %
UK scheduled air	40,330	45,690	22,960	132,420	108,970	-17.7
Inter-Island scheduled air	5,410	3,760	1,990	17,890	11,160	-37.6
Foreign scheduled air	800	1,040	230	2,770	2,070	-25.3
Total scheduled air	**46,530**	**50,490**	**25,170**	**153,070**	**122,200**	**-20.2**
UK scheduled sea	950	1,000	910	3,920	2,870	-26.9
Inter-Island scheduled sea	440	390	290	4,520	1,120	-75.2
French scheduled sea	2,280	3,740	1,960	14,330	7,980	-44.3
Total scheduled sea	**3,680**	**5,130**	**3,160**	**22,780**	**11,970**	**-47.5**
Private aircraft	610	690	520	2,530	1,820	-27.9
Visiting yachtsmen	60	*	30	290	90	-69.0
Total departing passengers	**50,880**	**56,320**	**28,880**	**178,670**	**136,080**	**-23.8**

Passenger data forms the basis for calculating the volume of tourism visits, but also includes resident movements, departing seasonal or long-term workers, some transit passengers and also visitors who may be counted twice in departures as they take an off-Island trip during their stay in Jersey. Differing routes have a varying profile of passenger depending upon schedules, the time of year and the availability of onward connections.

Within the Passenger Exit Survey respondents are asked whether the airport they are flying to from Jersey is their final arrival destination or whether they are travelling onward to a final airport. Over the first 3 months, only 7% of visitors departing from Jersey were going to take another flight to an onward destination.

Residents are much more likely to travel onward from their initial airport, with 28% doing so between January and March. This was mainly on the Gatwick route where 42% or residents were travelling onward, but over a quarter of residents flying to Guernsey were also travelling onward from there. Many of these would have remained on the same aircraft, with the plane flying to a UK airport via Guernsey.

Figure 1 on the next page shows the proportion of departing passengers over the first quarter that were classified as tourism visits over the past 4 years.

Departing visitors

Figure 1 – Tourism visits as a proportion of total passenger departures, Jan-Mar 2017 – 2020
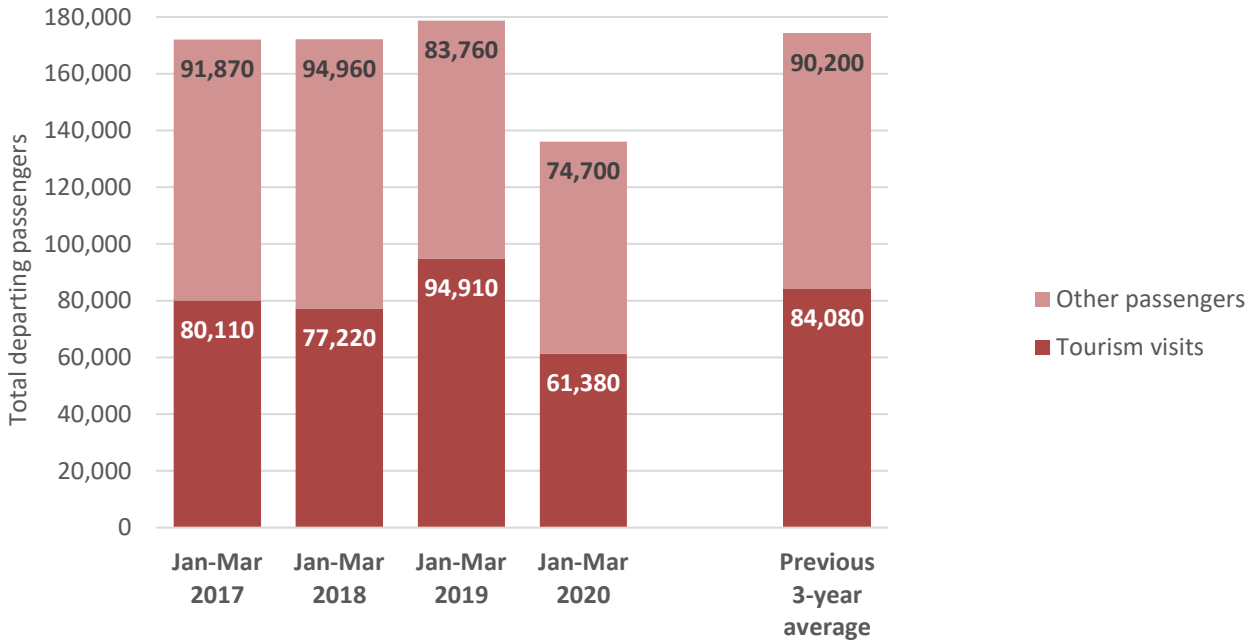
To the end of March, 45.1% of the total departing passengers were visitors at the end of their stay in Jersey. This is lower than the cumulative 53.1% seen over the same period in 2019 but similar to the proportions seen in the previous two years.

Table 2 below shows the breakdown of visits by mode of transport. 88.5% of visitors departing from Jersey over the period January to March 2020 left on scheduled air routes. Of those departing by air, 88.7% were departing to a UK airport and 11.1% were departing to Guernsey. Two-thirds of visitors departing by sea over the first 3 months of 2020 were on the French sea routes and 22% were on the UK sea routes.

Table 2 – Breakdown of visits by mode of departure, 2019 - 2020

	Volumes			Volumes		
	January 2020	February 2020	March 2020	Jan-Mar 2019	Jan-Mar 2020	Overall change, %
Scheduled air	20,870	22,030	11,430	82,010	54,330	-33.8
Scheduled ferry	2,290	2,100	1,670	11,490	6,070	-47.2
Private aircraft	300	340	260	1,120	900	-20.0
Visiting yachtsmen	60	*	30	290	90	-69.0
Cruise passengers	0	0	0	0	0	
Total visits	**23,530**	**24,470**	**13,380**	**94,910**	**61,380**	**-35.3**

Cumulatively to the end of March, visitors on the scheduled air routes have decreased by 33.8% and visitors departing on scheduled ferries have decreased by 47.2% compared to the same period in 2019.

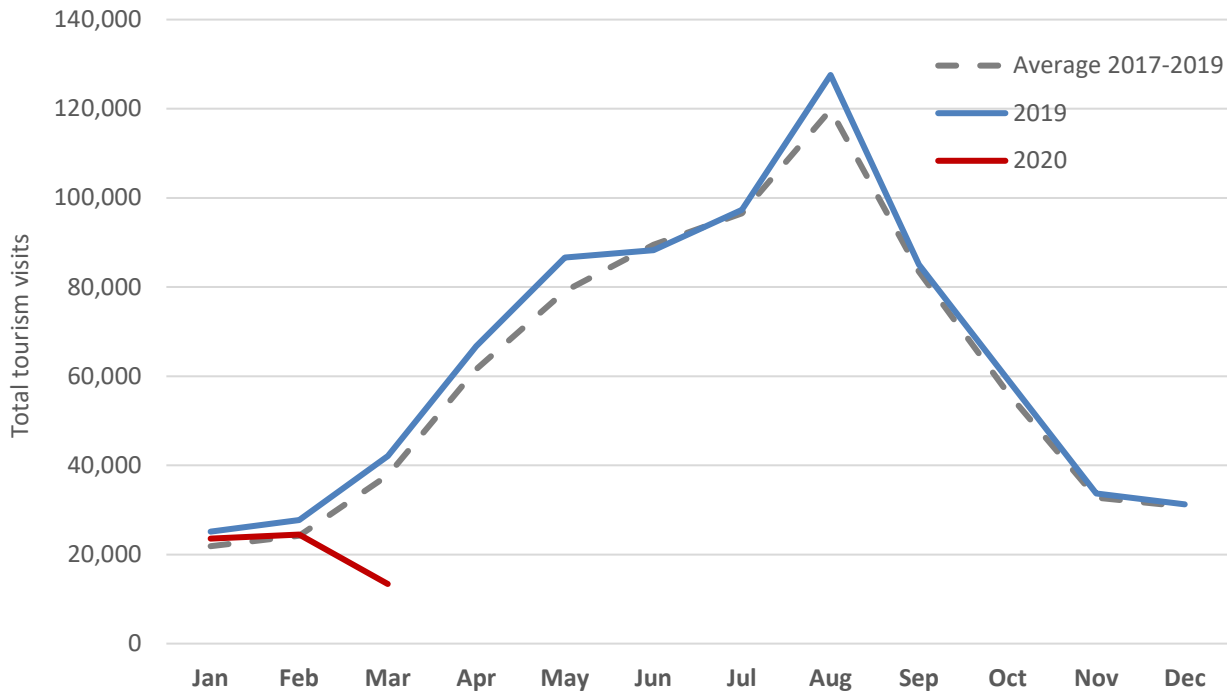## Figure 2 – Tourism visits by month, 2017 – 2020

Figure 2 shows how the month of March this year has mainly impacted on the decline in the volume of tourism visits in the first quarter. Over the previous 3 years, January to March has accounted for an average of 11.5% of annual tourism visits to Jersey. The number of tourism visits in March 2020 was lower than both January and February and the lowest monthly total seen over the past 4 years.

## Figure 3 – Overnight and day visits, Jan-Mar 2017 – 2020
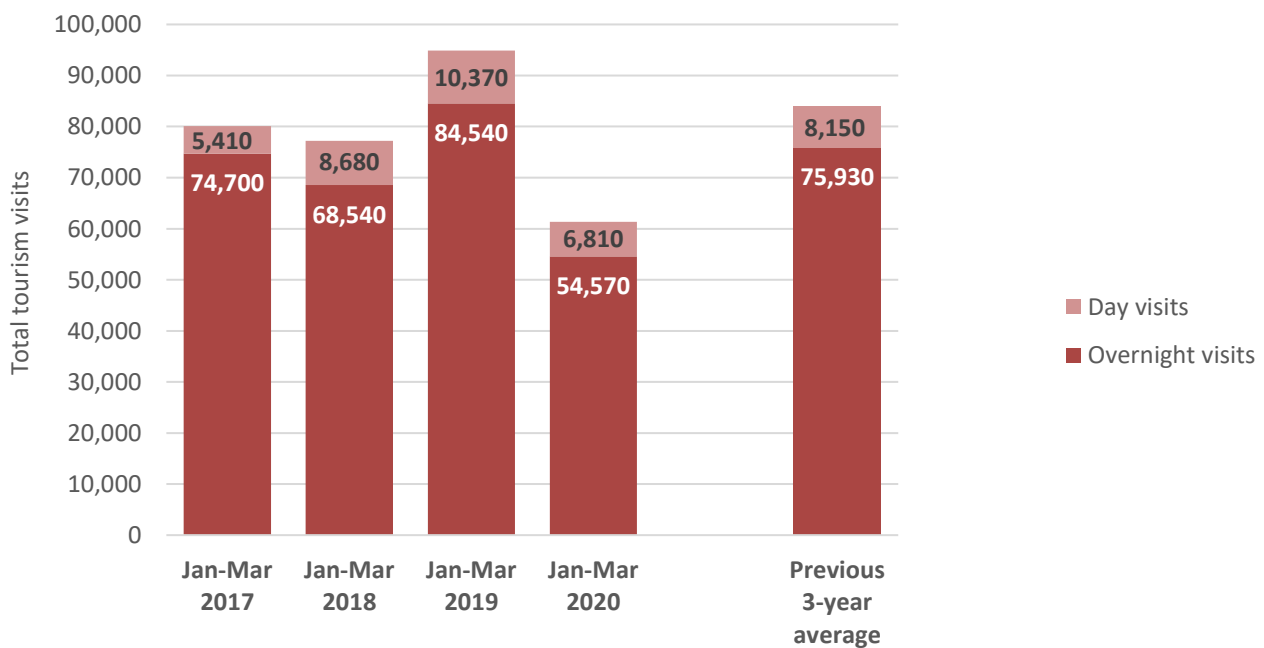
Cumulatively to the end of March 2020, 89% of tourism visits involved a stay in Jersey of at least one night. This is very similar to the proportion of overnight visits over the same period in 2019 and also the previous 3-year average (90%). Cumulative overnight visits in 2020 have decreased by 35.5% and day visits have decreased by 34.3% compared to 2019.

Figure 4 – Tourism nights spent in Jersey, Jan-Mar 2017 – 2020
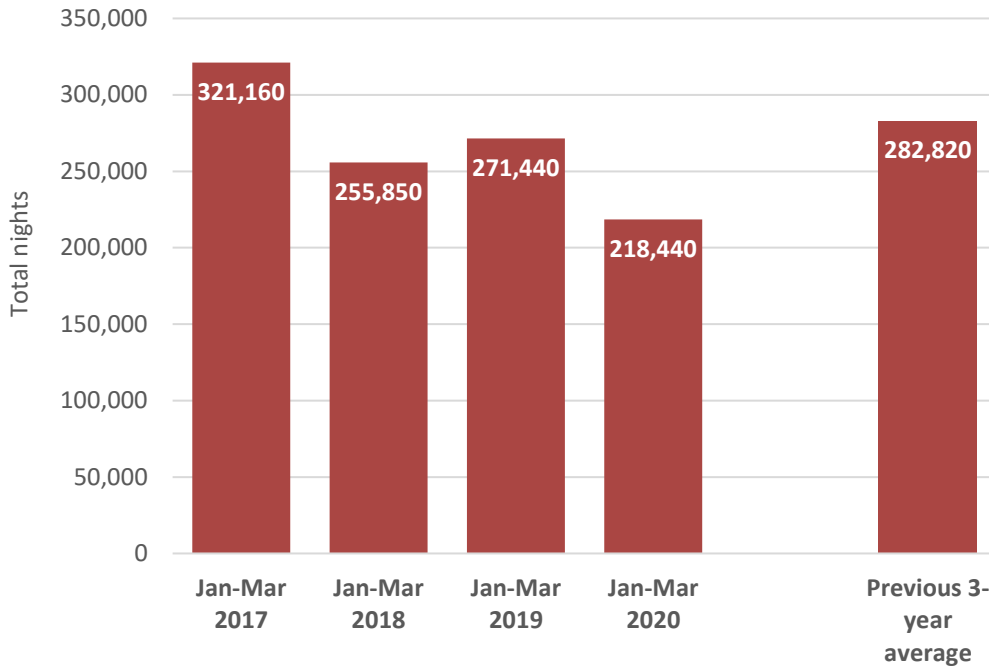
To the end of March, the average length of stay for those staying overnight in 2020 was 4.0 nights, resulting in a 19.5% decrease in total visitor nights spent in Jersey; the lowest cumulative total seen over the past 4 years.

## Figure 5 – Tourism visits by length of stay, Jan-Mar 2020
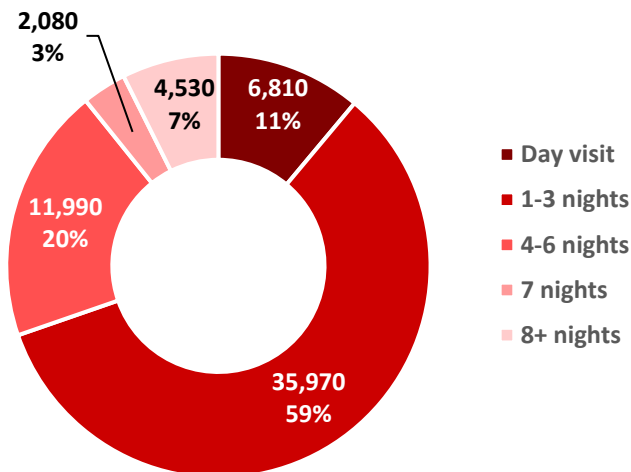
Compared to January to March 2019:

- Day visits have decreased by 34.3%
- Visits of 1-3 nights decreased by 40.3%
- Visits of 4-6 nights decreased by 25.1%
- Visits of 7 nights decreased by 47.1%
- Visits of 8+ nights increased by 5.1%

NB: Refer to the appendices for the equivalent figures for previous years.

The reduced number of visitors in March alone has led to decreases in visitor numbers in all stay categories apart from those staying for 8 nights or more. Compared to 2019, longer stay visits have increased by 5.1%, which combined with an increase in their average stay has resulted in an increase of 40.2% in overnight stays for those staying 8 nights or more. These longer-stay visitors were mainly visiting friends and family.

Figure 6 – Tourism visits by purpose, Jan-Mar 2020
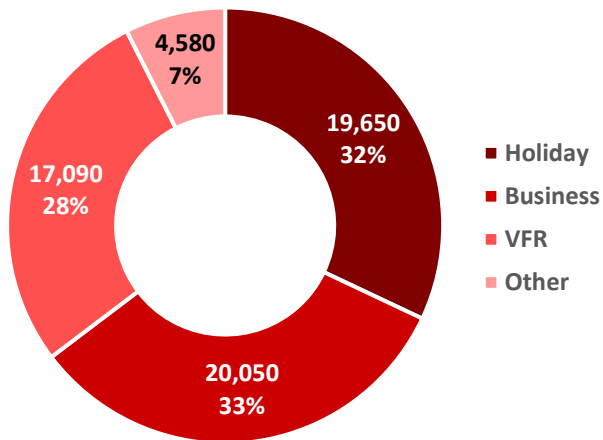
Compared to January to March 2019:

- Holiday visits have decreased by 55.6%
- Business visits have increased by 3.8%
- Visits to friends and relatives (VFR) have decreased by 8.4%
- Other visits have decreased by 63.8%

Average stay for holiday visits has increased from 3.0 nights in 2019 to 3.2 nights in 2020, resulting in a decrease in holiday nights of 52.1%.

Average stay for business visits has increased from 2.8 nights to 3.0 nights, resulting in an overall increase in business nights of 12.6%.

Average stay for VFR visits has increased from 4.9 nights to 5.8 nights, resulting in an increase in VFR nights of 11.1%.

NB: refer to the appendices for the equivalent figures for previous years. "Business" visits also include those attending a conference or seminar, trade fair or exhibition. Those visiting friends and family (VFR) do not necessarily stay with friends and family and also stay in commercial accommodation. "Other" purposes of visit also include participating or spectating at sporting or cultural events and festivals, as well as educational trips.

The total number of holiday visits to the end of March was significantly lower than in 2019 primarily due to the large fall in March, but also due to smaller falls in previous months.

Despite the decline in business visits in March, the number of business visits and nights have both increased over the first 3 months compared to 2019.

Due to the fall in March, the number of VFR visits decreased compared to the first 3 months of 2019, but the number of VFR nights spent in the Island increased due to their increased length of stay.

Table 3 – Purpose of visit, Jan-Mar 2019 - 2020

	Volumes			**Volumes**		
	January 2020	**February 2020**	**March 2020**	**Jan-Mar 2019**	**Jan-Mar 2020**	**Overall change, %**
Holiday overnight visits	6,270	8,370	4,080	42,520	18,710	-56.0
Holiday day visits	160	570	210	1,780	940	-46.9
Business overnight visits	6,240	5,730	3,340	14,240	15,300	7.5
Business day visits	2,310	1,640	810	5,080	4,760	-6.4
VFR overnight visits	7,320	6,430	3,030	18,060	16,780	-7.1
VFR day visits	150	100	60	600	320	-47.5
Other overnight visits	500	1,550	1,740	9,730	3,780	-61.1
Other day visits	590	80	130	2,920	800	-72.6
Total visits	**23,530**	**24,470**	**13,380**	**94,910**	**61,380**	**-35.3**

Figure 7 – Tourism visits by country of residence, Jan-Mar 2020
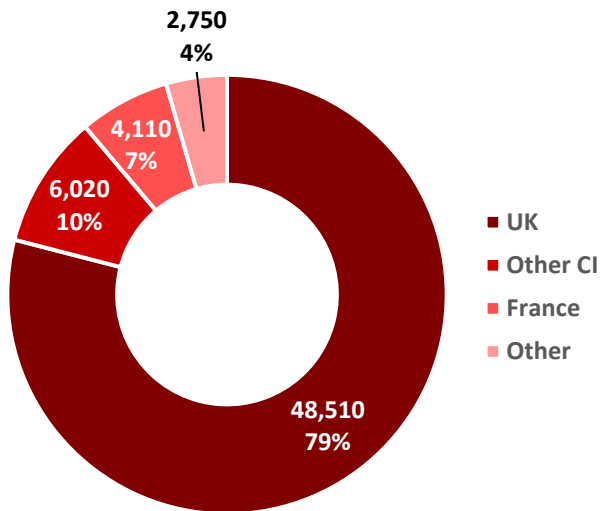
Compared to January to March 2019:

- UK visits have decreased by 29.1%
- Other CI visits have decreased by 61.1%
- Visits from other countries have decreased by 38.1%, with all main markets showing decreases due to the falls in March

- UK visitor nights have decreased by 23.4%
- CI visitor nights have decreased by 57.7%
- Other visitor nights have increased by 35.8% due to an increased average stay

NB: refer to the appendices for the equivalent figures for previous years. Due to the small size of some of the foreign markets, they have been amalgamated into "Other" in this report. Some of the larger markets will be separated out in the months where tourism volumes increase.

To the end of March, 79% of total visits and 76% of visitor nights in Jersey were from UK visitors. The cumulative number of UK visits and nights have both decreased by over 20% compared to 2019 as well as the previous 3-year average.

The total volume of visits and visitor nights from the other Channel Islands have decreased to the greatest extent compared to the same period in 2019; both declining by around 60%. However, this was mainly due to the large increases seen in 2019, with the cumulative figures for 2020 being more in line with 2017 and 2018.

Following a good start to the year, the number of visits from France has decreased by 37.8% compared to 2019. However, an increase in overnight visits and their length of stay has more than doubled the number of nights spent by French visitors in Jersey over the first 3 months.

Table 4 – Country of residence, Jan-Mar 2019 - 2020

	Volumes			**Volumes**		
	January 2020	**February 2020**	**March 2020**	**Jan-Mar 2019**	**Jan-Mar 2020**	**Overall change, %**
UK	17,990	20,080	10,440	68,390	48,510	-29.1
Guernsey and Other CI	2,670	1,830	1,520	15,460	6,020	-61.1
Ireland	140	130	70	550	340	-38.5
France	1,610	1,490	1,010	6,600	4,110	-37.8
Germany	20	30	40	140	90	-40.3
Other countries	1,090	910	310	3,770	2,320	-38.5
Total visits	**23,530**	**24,470**	**13,380**	**94,910**	**61,380**	**-35.3**

Table 5 – UK region of residence for visitors on scheduled air and sea routes, Jan-Mar 2020

|	Volume	%
South East	14,990	31.2
Greater London	10,100	21.1
North West	5,630	11.7
South West	4,810	10.0
Scotland	2,860	6.0
West Midlands	2,350	4.9
Yorkshire / Humberside	2,340	4.9
East Midlands	1,480	3.1
East Anglia	1,310	2.7
Wales	1,100	2.3
Northeast	520	1.1
Isle of Man	300	0.6
Northern Ireland	200	0.4
Total visits	**47,980**	

NB: The figures only includes UK visitors covered by the Passenger Exit Survey and therefore exclude UK visitors to Jersey travelling by private plane or in private yachts. Regions are determined by the first half of UK postcodes.

Over the period January to March, over half of UK visitors travelling to Jersey on the scheduled air and sea routes were resident in the Greater London and South East regions, highlighting the importance of the Gatwick air route over the winter period.

There were no direct flights to Northern Ireland or the Isle of Man over the period and very few from the North East, which is reflected in the low number of visitors from these regions.

Visitor expenditure

Figure 8 – Tourism on-Island expenditure, Jan-Mar 2017 – 2020
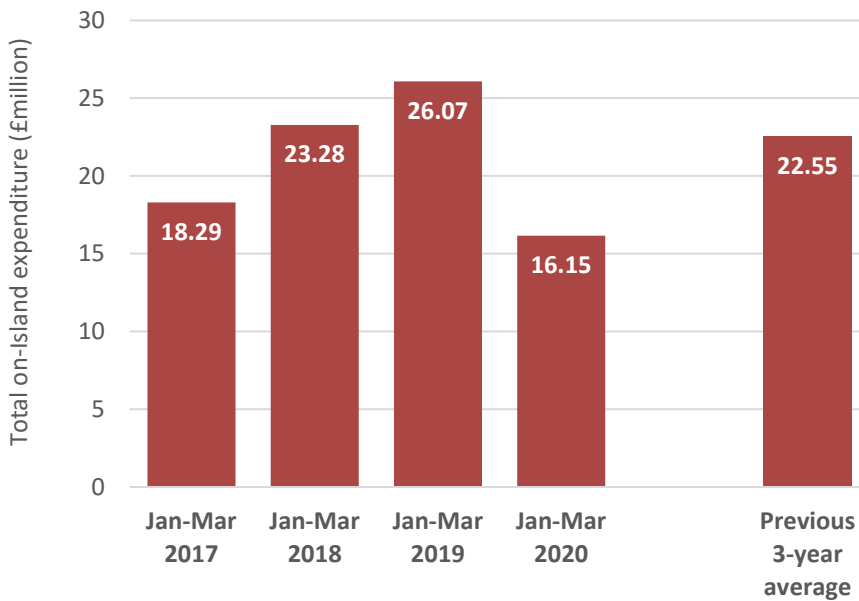
NB: Expenditure data in Figure 8 from years prior to 2020 has not been reflated to 2020 values. In the absence of any data from 2020, expenditure for visiting yachts has been based upon the daily spend from 2019.

Following the growth seen in recent years, cumulatively to the end of March on-Island visitor expenditure has decreased by 38.1% compared to 2019. This was as a result of both the decline in visitor volume as well as a proportionate increase in those staying with friends and relatives; most of whom do not pay to stay in commercial accommodation.

Figure 9 – Tourism on-Island expenditure by quarter, 2017 – 2020
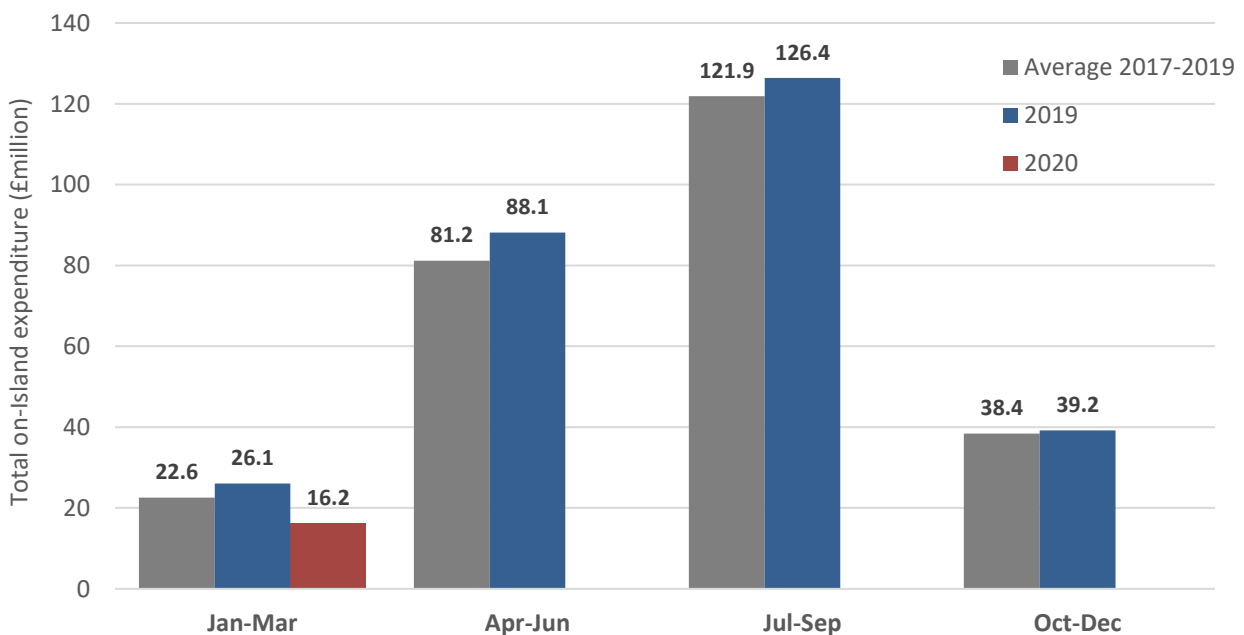
Over the previous 3 years, the first quarter has on average accounted for 8.5% of annual on-Island tourism expenditure in Jersey, with this increasing to 9.3% in 2019. Although the off-season represents growth potential, Figure 9 emphasises the continued importance of the summer months to Jersey's visitor economy.
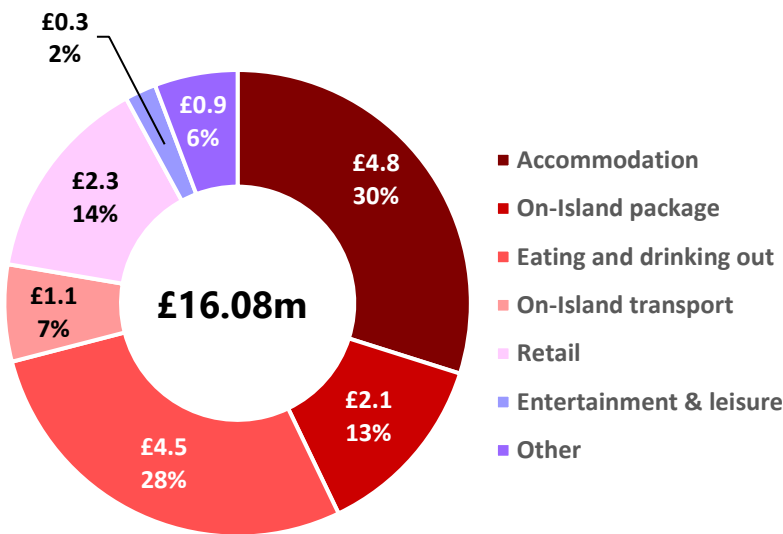
The figures for 2017 to 2019 shown in the previous 2 charts have not been inflated to show the changes in real terms. The table below shows visitor expenditure reflated to 2020 values.

Table 6 – Tourism on-Island expenditure reflated, Jan-Mar 2017 - 2020

	Expenditure				
	Jan-Mar 2017	Jan-Mar 2018	Jan-Mar 2019	Jan-Mar 2020	Overall change, %
On-Island spend per visit	£251	£321	£282	£263	-6.7
On-Island spend per night	£63	£97	£99	£74	-25.1
Total on-Island spend (£million)	**£20.1m**	**£24.8m**	**£26.8m**	**£16.2m**	**-39.7**

Applying the March retail price index to previous years' data shows a decrease in visitor expenditure in real terms of 39.7% compared to 2019 and a decrease of 32.3% compared to the previous 3-year average.

Figure 10 – Breakdown of tourism on-Island expenditure, Jan-Mar 2020 (£million)

- **Accommodation**
- **On-Island package**
- **Eating and drinking out**
- **On-Island transport**
- **Retail**
- **Entertainment & leisure**
- **Other**

Most of the £2.1m spent on-Island by those on a packaged visit to the Island (i.e. where a single price is paid to cover the travel, accommodation and other visit elements) would be on the accommodation, although packaged visits can also include transport, transfers, tours and other activities.

During the winter months, a relatively small amount is spent on entertainment and leisure activities due to the lower volume of holiday visitors and the fact that many of the paid attractions are closed.

NB: The amounts only shows the estimated expenditure for those on the scheduled air and sea routes which were covered by the Visitor Survey. An additional £0.7 million is estimated to have been spent by those travelling by private plane or yacht. "Other" also includes money spent at the port terminals, including within the airport Duty Free shop.
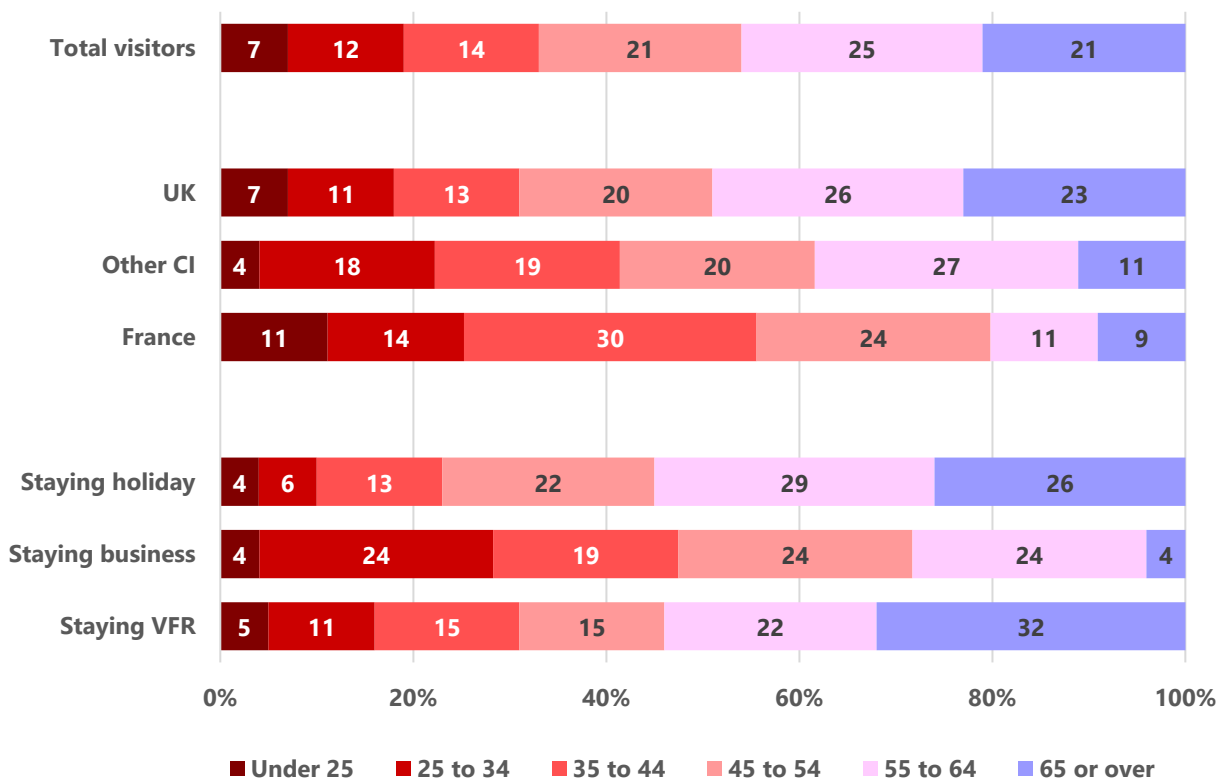
Travel cost

For those travelling independently where travel can be costed separately from an inclusive package, the average return fare paid to Jersey over the first 3 months in 2020 was £104. This was very similar for those travelling by air and those travelling by sea. Sea travel can also include the cost of a vehicle and cabin if overnight.

Visitor profile

Males and females accounted for an equal proportion of visitors surveyed in the Passenger Exit Survey (both 50%). The sex of respondents was very similar at both survey locations with 51% of those surveyed at the airport and 49% of those surveyed at Elizabeth terminal being male.

16% of departing visitors were travelling with children aged under 16; 14.5% of those travelling by air and 30% of those travelling by sea.

Figure 11 – Age profile of adult visitors aged 16 or over, Jan-Mar 2020

|	Under 25	25 to 34	35 to 44	45 to 54	55 to 64	65 or over
Total visitors	7	12	14	21	25	21
UK	7	11	13	20	26	23
Other CI	4	18	19	20	27	11
France	11	14	30	24	11	9
Staying holiday	4	6	13	22	29	26
Staying business	4	24	19	24	24	4
Staying VFR	5	11	15	15	22	32

NB. The percentages are only for visitors travelling on the scheduled air and sea routes.

Overall, just less than half of adult visitors to Jersey over the first 3 months of 2020 were aged 55 or over.

As shown in Figure 11, over the first quarter, visitors from the UK were more elderly than those visiting from Jersey's other 2 main markets of the Other CI and France.

There was also a significant difference in age profile by purpose of visit, with those staying in Jersey on holiday and those visiting friends and relatives being more elderly than those staying in Jersey for business purposes.

Figure 12 – Proportion of first-time visitors to Jersey, Jan-Mar 2020

- **First-time visitors**
- **Repeat visitors**
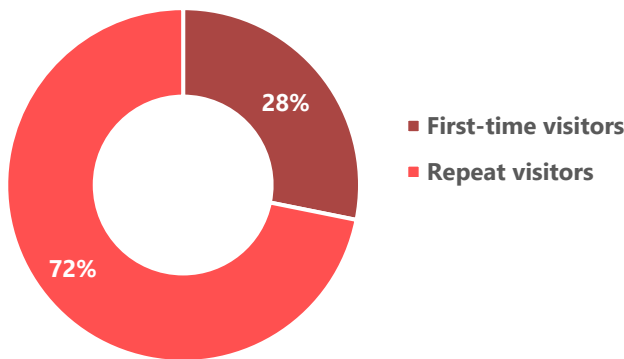
Over the 3 previous years, the proportion of first-time visitors over the first 3 months has been consistent at 32% to 33%.

The main reason for the fall in 2020 has been the change in the profile of visitors, with a higher proportion of both business visits and those visiting friends and relatives over Q1 this year.

NB: The above percentages are only for visitors travelling on the scheduled air and sea routes

Figure 13 – Proportion of first-time visitors, Jan-Mar 2020
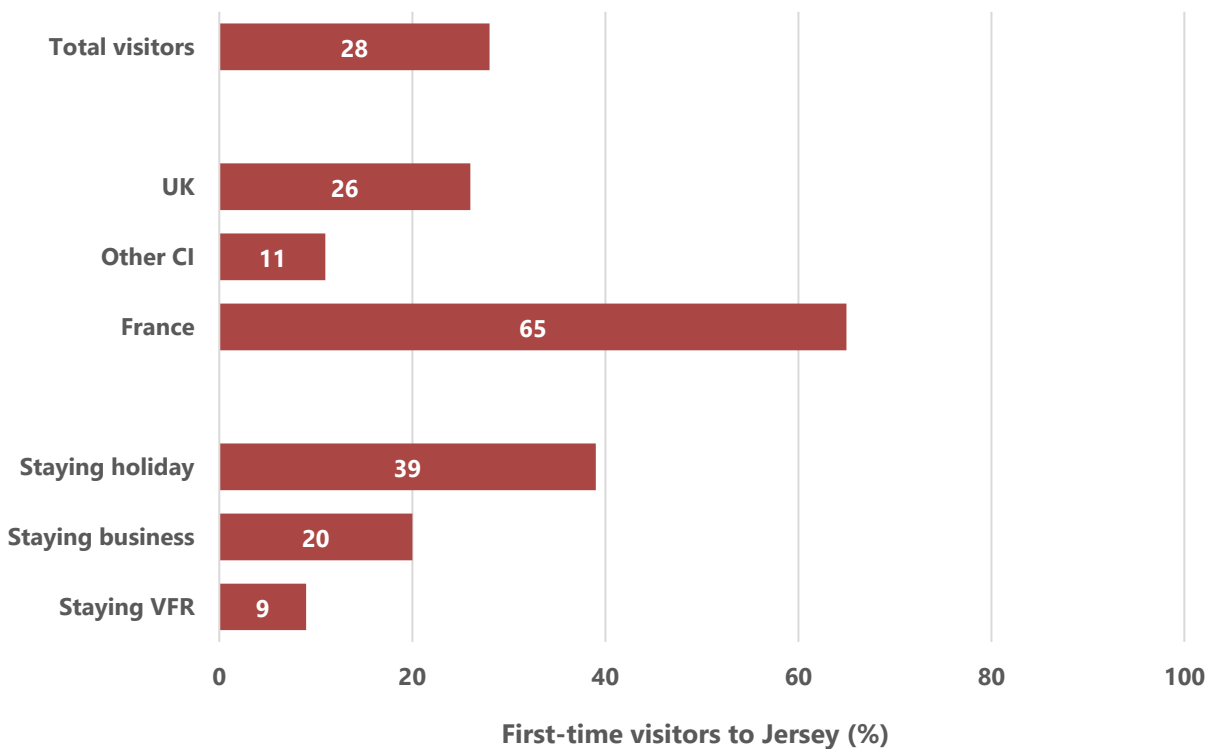

First-time visitors to Jersey (%)

Figure 13 shows that French visitors were much more likely to be visiting Jersey for the first time between January and March than visitors from the UK and the other Channel Islands.

Those staying in Jersey for a holiday were also much more likely to be first-time visitors than those visiting friends and relatives or travelling for business purposes.

Booking methods for a visit to Jersey

The more detailed Visitor Survey asked several questions about how bookings were made and what was included in the price paid. This information is used to make estimates for on-Island visitor expenditure and is also useful in better understanding the visitor market to Jersey.

Figure 14 – Proportion of inclusive package visitors, Jan-Mar 2020
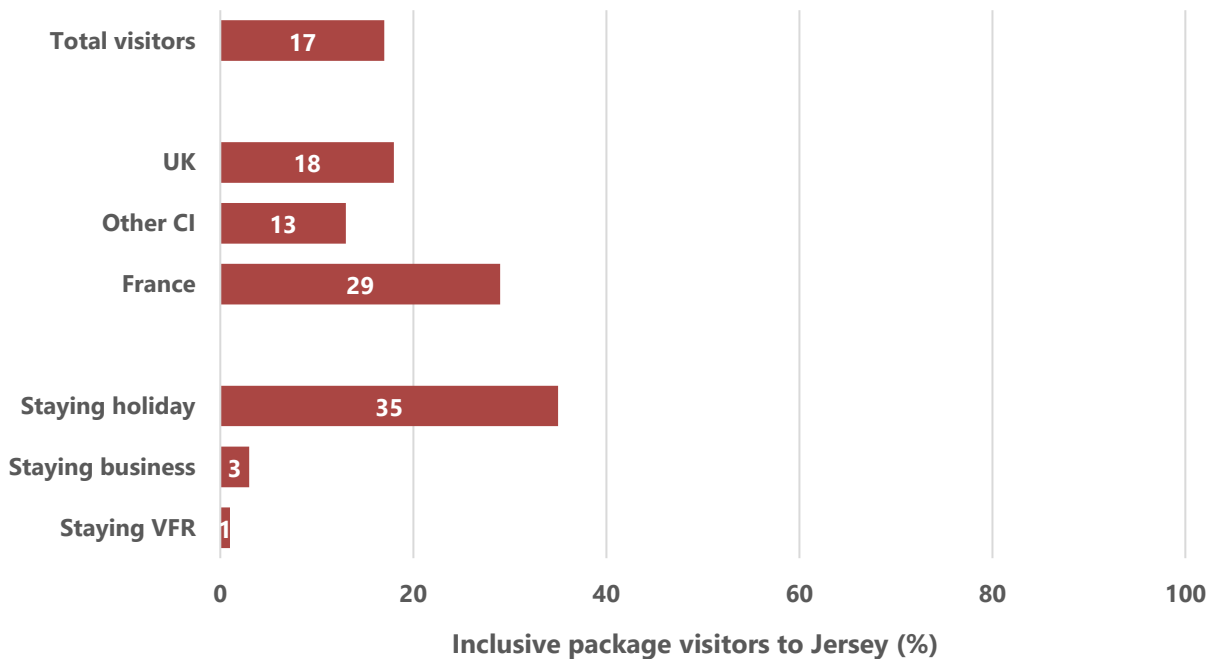
NB. "Inclusive package visits" are defined as a single price being paid for travel and accommodation together. Those on a day visit are excluded from the above.

Inclusive package bookings

Figure 14 shows a relatively small proportion of 17% of staying visitors booked their travel and accommodation together as part of an inclusive package over the first 3 months of the year. This proportion would be expected to increase over the main summer months when holiday visits contribute to a larger proportion of Jersey's total overnight stays. Over a third of those staying for a holiday in Jersey had booked an inclusive package, but a very high proportion of those visiting friends and relatives or visiting for business purposes booked their travel and accommodation separately. Three-quarters of those whose main purpose was to visit friends and relatives stayed with friends or family in Jersey and would not therefore have needed to pay for an inclusive package.

72% of those who booked an inclusive package did so online with bookings made by the following means:

- 68% through a travel agent or tour operator
- 20% through an airline or ferry operator
- 9% through the accommodation in Jersey where they stayed
- 3% by other means

Apart from the travel and accommodation, the following additional elements were included in packages:

- 67% meals at the accommodation
- 29% transfers to/from the accommodation
- 20% car hire
- 9% holiday/travel insurance
- 5% excursions and/or activities in Jersey

Independent bookings

Accommodation

Over the first 3 months, 83% of staying visitors booked their travel and accommodation separately (commonly known as "independent" bookings).

Excluding those who stayed with friends or family in Jersey and those staying in free accommodation (e.g. provided by a company or staying in a second home), 80% of independent bookings were made online with bookings made by the following means:

- 43% through an online booking site such as booking.com, hotels.com, Trivago. Expedia, AirBnB etc.
- 42% direct with the accommodation provider
- 3% through a travel agent or tour operator (in a retail shop or over the telephone)
- 12% by other means (mainly the accommodation was booked by someone else on their behalf)

The percentages above are for all visit purposes. For those booking their accommodation as part of a holiday visit to Jersey, 53% booked through an online booking site and 43% booked direct with the accommodation provider.

Repeat visitors were twice as likely as those visiting Jersey for the first time to book direct with the accommodation provider.

Travel

For those booking their travel independently, including those on a day visit, 94% made the booking online. 95% of those travelling by air booked online and 85% of those travelling by sea. Travel bookings were made by the following means:

- 74% direct with the airline or ferry operator
- 9% through an online travel booking site such as booking.com, Expedia, Agoda, Skyscanner etc.
- 1% through a travel agent or tour operator (in a retail shop or over the telephone)
- 16% by other means

For those booking their travel as part of a holiday visit to Jersey, 88% booked direct with the airline or ferry operator and 9% booked through an online travel booking site.

The visit experience

This section firstly shows the type of accommodation visitors stayed in and the activities they undertook over the first 3 months of 2020 before then rating the experience of various aspects of a visit to Jersey.

Figure 15 – Type of accommodation stayed in, Jan-Mar 2020

Legend:
- Hotel
- With friends/family
- Self-catering
- Guest house
- AirBnB
- Other
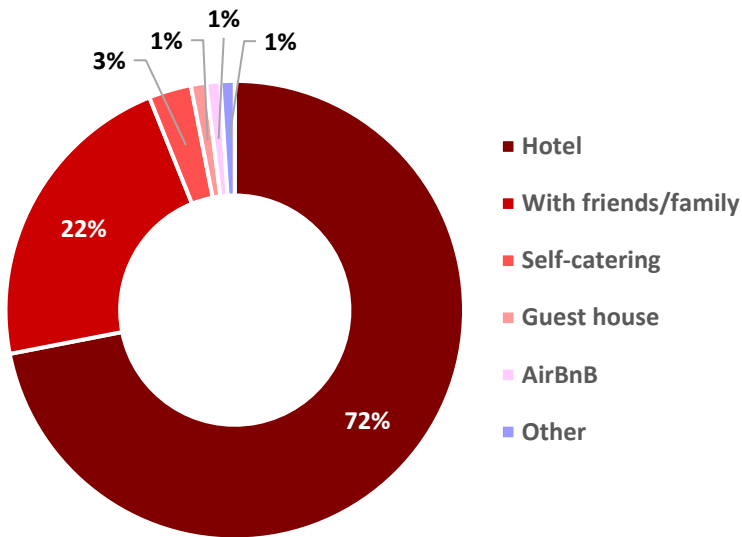
Over the first 3 months, no respondents said that they had stayed in either a hostel or a campsite.

For those staying on holiday, 91% stayed in a hotel, 4% in self-catering, 2% in a guest house, 2% with friends or relatives and 1% in AirBnB.

For business visitors, 90% stayed in a hotel, 2% in self-catering, 2% in a guest house, 2% with friends or relatives and 1% in AirBnB.

For those visiting friends and relatives, 73% actually stayed with a friend or relative and 27% stayed in paid accommodation.

NB: Figure 15 only shows the accommodation used for those on the scheduled air and sea routes which were covered by the Visitor Survey. Those travelling by private plane or boat, as well as those on a day visit are excluded.

Figure 16 – Proportion of visits spent in commercial accommodation, Jan-Mar 2017 – 2020
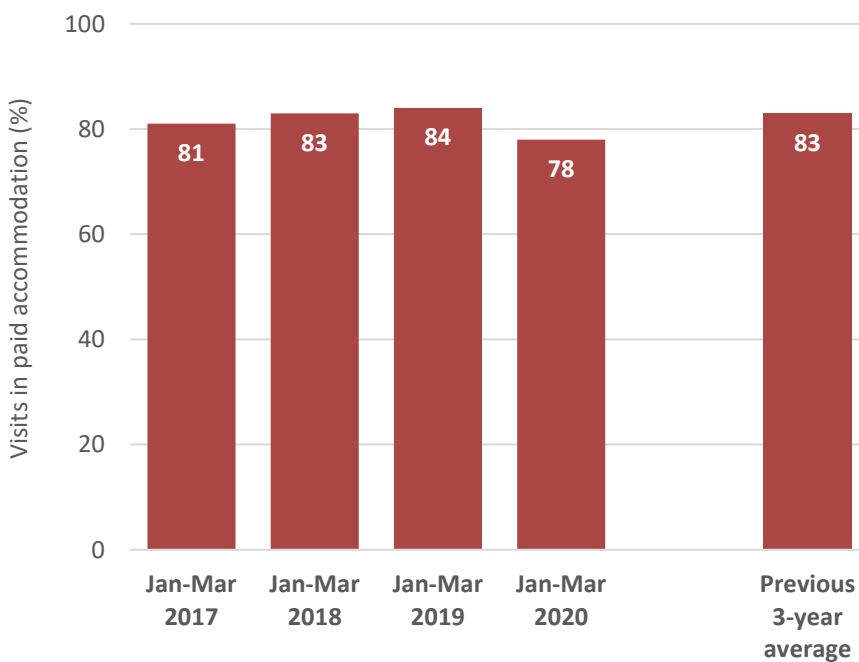
Reflecting the proportionate increase in those visiting friends and relatives in 2020, the number of visits spent in commercial accommodation has fallen compared to the same period in 2019 and also compared to the previous 3-year average.

Figure 17 – Activities participated in during the visit, Jan-Mar 2020
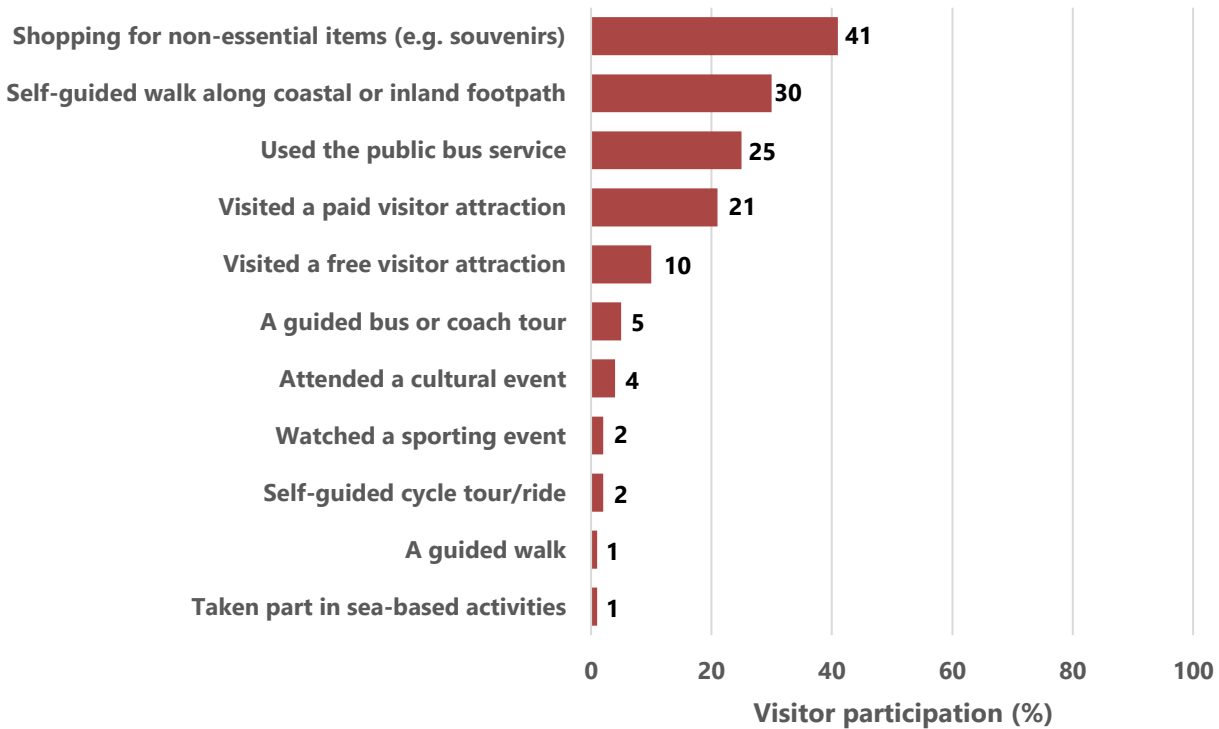
NB: Figure 17 excludes those travelling by private plane or boat. It includes those on a day visit as well as those staying for at least a night.

The results shown in the chart reflect the seasonal activities available in Jersey during the winter period when many of the visitor attractions are closed and many of the activity providers do not operate.

It highlights the importance of tourism to the retail sector, as well as to Jersey's public transport. French visitors, many of whom visit for a day trip, were most likely to say they had participated in shopping during their visit (60%).

Those staying in Jersey for a holiday were more likely to have participated in most of the above activities; most notably shopping (62%), a self-guided walk (44%), visiting a paid attraction (38%) and use of the public bus service (38%).

Table 7 – Rating scores for Island attributes, Jan-Mar 2017 - 2020

	Jan-Mar 2017	Jan-Mar 2018	Jan-Mar 2019	Jan-Mar 2020
Safety & security	4.8	4.7	4.6	4.7
Cleanliness	4.7	4.6	4.6	4.7
Beaches	4.7	4.7	4.7	4.7
Countryside				4.7
Accommodation	-	4.4	4.4	4.6
Restaurants, cafés & bars	4.5	4.3	4.3	4.5
Attractions	4.5	4.2	4.2	4.3
Shops / retail	4.1	3.9	4.0	4.2
Value for money	3.8	3.8	3.8	3.8
Jersey in general	4.6	4.4	4.5	4.6

NB: Average scores are based upon a rating scale from 5 for "Very good" down to 1 for "Very poor". The rating for beaches and countryside were combined in one question prior to 2020.

Table 7 shows consistently high ratings for all attributes listed, although value for money has received the lowest rating in each year. The second lowest rating, including in 2020, has been for Jersey's shops and the retail experience.

The highest ratings have been for Jersey's beaches and countryside, its cleanliness and safety & security.

Compared to the equivalent period in previous years, all ratings over the first 3 months of 2020 have either improved or stayed at the same level.

Likelihood to revisit and to recommend Jersey

Figure 18 – Likelihood to revisit Jersey, Jan-Mar 2020
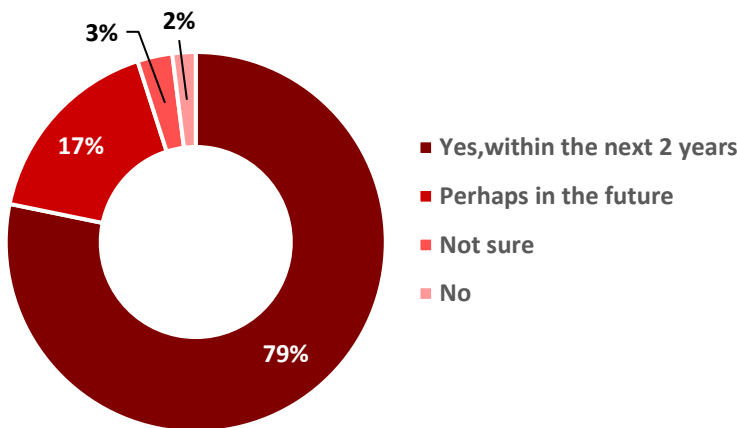
The likelihood to revisit Jersey at some point in the future varies by country of residence:

- 96% of UK visitors
- 99% of visitors from the Other CI
- 81% of French visitors

Both day and staying visitors were equally likely to revisit, but day visitors were more likely to do so within the next 2 years.

NB: Figure 18 excludes those travelling by private plane or boat.

Table 8 – Likelihood to revisit Jersey, Jan-Mar 2017 - 2020

	Jan-Mar 2017	Jan-Mar 2018	Jan-Mar 2019	Jan-Mar 2020
Yes, within the next year or two	77%	69%	76%	79%
Perhaps in the future	17%	23%	19%	17%
Not sure	4%	7%	4%	3%
No	2%	1%	1%	2%

Apart from 2018, results to this question have been fairly consistent, with over three-quarters saying that they would be likely to revisit Jersey within the next year or two. The result over the first 3 months of 2020 has shown the highest proportion to date likely to revisit within 2 years, although this question was asked mainly pre-Covid and intentions may of course change as a result of the recent pandemic.

Net Promoter Score

The Visitor Survey also asks, on a score of 0 to 10, how likely respondents are to recommend visiting Jersey to a friend or relative. Consistent with the higher ratings this year and the increased likelihood to revisit Jersey, the Net Promoter Score for holiday visitors has also increased:

Jan-Mar 2017   46
Jan-Mar 2018   54
Jan-Mar 2019   55
Jan-Mar 2020   60

NB: The Net Promoter Score is calculated by subtracting the percentage of those giving a score of 0-6 ("detractors") from those giving a score of 9 or 10 ("promoters").

Appendix - notes

Methodology

Background

Prior to 2016, Jersey used alternative ongoing data sources, including a compulsory visitor registration scheme, to estimate the volume and value of tourism to Jersey. Periodic exit surveys were also undertaken to check and recalibrate the estimates and ongoing methodology. From July 2016, Visit Jersey implemented a continuous exit survey with a new methodology and definitions to align Jersey's figures more closely with established tourism data produced by other countries and destinations. The fieldwork was outsourced, with the analyses and reporting were undertaken in-house.

From 2020, Statistics Jersey has been contracted to undertake both the exit survey fieldwork and the analyses and reporting. The questionnaires and methodology from January 2020 have been modified, which may have some impact upon the direct comparability of figures with recent years.

Data sources

1.   Passenger exit survey

A detailed breakdown of passengers by route of departure is provided by the Ports of Jersey as well as Condor Ferries for their own sea routes. However, these figures include resident movements, departing visitors, as well as some transit passengers, longer-term or seasonal workers and 'returning visitors' i.e. those who travel off-Island during their stay in Jersey and are therefore counted twice within the passenger data.

In order to break down (or calibrate) Jersey's passenger departure figures, a comprehensive exit survey is undertaken with a representative and sufficiently robust sample of passengers as they depart through Jersey's passenger terminals at the airport and harbours. Interview shifts are planned to reflect passenger throughput and to cover all routes, all days of the week and all times of the day. It is particularly important in planning interview schedules that bias is not introduced by over-sampling morning or evening departures, or specific days of the week.
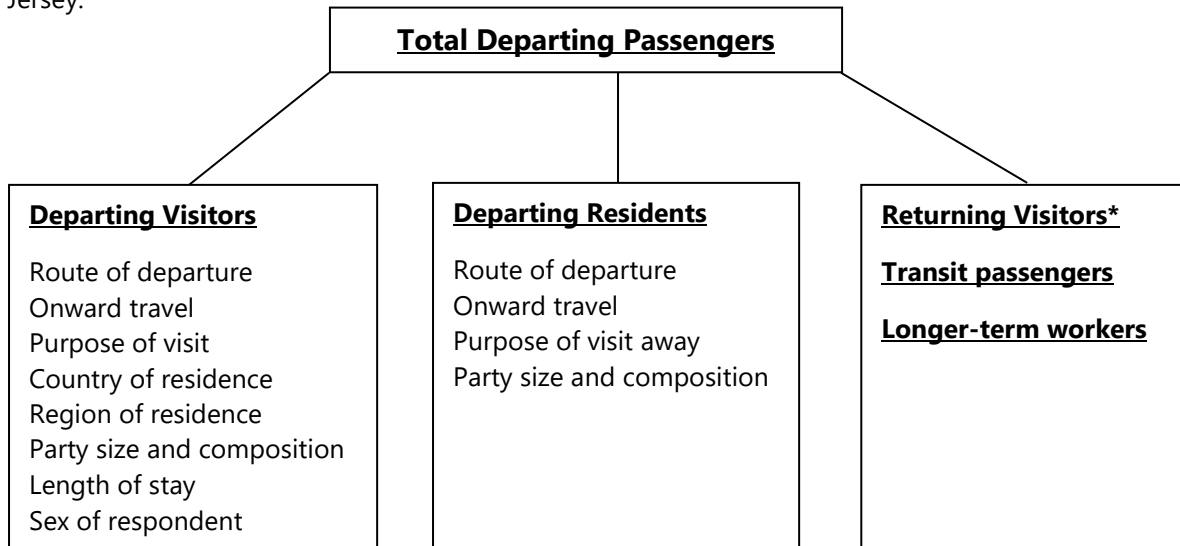
Within each interview shift, fieldworkers are instructed to adopt a randomised approach to interviewee selection so that any departing passenger, whether a resident or a visitor, has an equal likelihood to participate. At the airport and within the ferry terminals, interviews are conducted face-to-face as far as possible using electronic tablets for data collection. Within the car-holding area at Elizabeth Terminal, passengers in vehicles are given a self-completion version of the questionnaire to complete, with the interviewer returning to collect the questionnaire later, or the respondent dropping the completed questionnaire in the collection boxes.

The passenger exit survey questionnaire is very short to establish: the outward and onward route, number of persons travelling within the party, whether they are a resident or visitor to Jersey, purpose of visit, country and region of residence, length of stay and gender. Interviewers with relevant language skills are allocated as far as possible to appropriate shifts and the questionnaires are also translated into French, German, Polish and Portuguese if required.

Sample data from the passenger exit survey is weighted by passenger figures to form the basis of the monthly reports on the number of visits and overnight stays in Jersey. Where sample sizes on individual routes for an individual month are considered to be insufficiently robust, particularly when broken down further for departing visitors only, percentage breakdowns on these routes are induced using a larger sample size collated on that particular route over a longer time period, provided that the time period can be considered to be broadly similar in terms of passenger profile.

Survey outputs

The primary aim of the survey is to determine the breakdown of passengers on each route in order to determine the overall number of visits to Jersey by purpose of visit, country of residence and length of stay. Some additional profiling questions are asked of visitors, and residents are also asked their purpose of visit away from Jersey.

	Total Departing Passengers	
Departing Visitors Route of departure Onward travel Purpose of visit Country of residence Region of residence Party size and composition Length of stay Sex of respondent	**Departing Residents** Route of departure Onward travel Purpose of visit away Party size and composition	**Returning Visitors*** **Transit passengers** **Longer-term workers**

*Returning visitors are those who are counted twice in passenger numbers because they visit elsewhere during their stay in Jersey (e.g. visitor day trips to Sark, Herm or Jersey).

2.   Visitor survey

The monthly reports showing the breakdown of passengers and visits to Jersey are based upon results from the passenger exit survey. In additional to this and running alongside the passenger exit survey, separate interview shifts are allocated to a longer and more detailed survey of visitors departing from Jersey at the end of their stay. While the exit survey shifts are planned to be randomly representative of all departing passengers, the exit survey shifts are scheduled to more accurately reflect the movements of departing visitors only and can be upweighted in order to achieve adequate sample sizes of specific visit types (e.g. by purpose of visit or country of residence).

Within each interview shift, fieldworkers are again instructed to adopt a randomised approach to interviewee selection but need to establish whether the respondent is a visitor departing from Jersey at the end of their stay before continuing to complete the questionnaire. As with the exit survey, face-to-face interviews are conducted inside the passenger terminals, with self-completion questionnaires being distributed to passengers in non-resident vehicles in the car-holding area at Elizabeth ferry terminal.

The primary purpose of the visitor survey is to establish visitor expenditure in Jersey, but the questionnaire also provides the following additional data:

- a more detailed profile of visitors, such as age and previous visit experience
- type of accommodation stayed in
- booking method (inclusive/package tour or independent)
- where booking was made (online, travel agent etc.)
- activities undertaken during their visit
- ratings for various aspects of their stay in Jersey
- likelihood to visit Jersey again in the future
- likelihood to recommend Jersey (Net Promoter Score)

Data from the visitor survey is weighted by visitor data on each route established by the exit survey and is reported on a quarterly basis.

3. Private aircraft, visiting yachts and cruise passengers

Monthly data on the number of passengers departing from Jersey on private aircraft by destination airport is provided by the Ports of Jersey. Consistent with the methodology established by Visit Jersey, sensible percentages are applied to each route to estimate the proportion of passengers that are departing visitors. In the absence of any further information or sampling data, an average length of stay of 1 night is applied and all are assumed to have stayed in Jersey for business purposes. The country of residence for these visitors is determined by the route the aircraft is recorded as flying to.

The marine leisure section within Ports of Jersey provides a monthly breakdown of visiting vessels that have paid to stay overnight in the marinas. The nationality and length of stay is also provided on a monthly basis and an online survey is conducted during the main summer months by the marine leisure section to determine the expenditure of visiting yachtsmen in Jersey. Within the monthly reports produced by Statistics Jersey, all visiting yachtsmen are classified as staying holiday visits.

Ports of Jersey also provides monthly data on the number of cruise passengers visiting Jersey. Within the monthly reports, these are classified as holiday day visits.

Statistical reliability

Please note: Due to the fieldwork finishing earlier in March than initially planned, many of the smaller route breakdowns have been imputed for March based upon survey data over a cumulative basis. While this methodology provides more statistically reliable sample sizes for the individual routes, it also introduces some assumptions about the similarity of passenger profiles over the early months of the year. It should also be noted that the final 2 weeks of March were not covered at all by the survey fieldwork and the profile of departing passengers over that period may have differed from the sample data used.

Sample surveys are always subject to statistical error and the larger the sample size, the lower the statistical variation. The Passenger Exit Survey up to the end of March is based upon 5,220 completed surveys representing 9,090 departing passengers. Subject to the note above, the overall figures for the number of departing visitors on the scheduled air and sea routes should be considered as estimates with a 95% confidence interval of approximately ±1.0%. For departing visitors only, based upon 2,330 interviews representing 4,130 visitors, the figures should be considered as estimates with a 95% confidence interval of approximately ±1.5%. The more detailed Visitor Survey is based upon 941 surveys representing 1,742 departing visitors. These surveys are weighted by visitor numbers on each route calculated from the Passenger Exit Survey.

It should be noted that when breaking down the results by individual or amalgamated routes, the sample sizes become much smaller with a resultant increase in the statistical error. The sampling methodology requires that interview shifts are planned to be representative overall of departing passengers. However, it is possible to either over-sample or under-sample certain smaller groups who may just depart on a single or several flights or sailings in a month. This is particularly relevant in the winter months when overall volumes of passengers are smaller, with a correspondingly smaller sample of passengers. This should be considered when interpreting the estimates for some of the smaller sub-samples of visitors (e.g. by country of residence).

Response rate and coverage

- The sample size above for the Passenger Exit Survey represents 7% of total departing passengers on the scheduled air and sea routes over the first 3 months.
- Interviewers record the number of refusals as well as the number of self-completion questionnaires handed out in order to determine response rates; these were 78% for the Passenger Exit Survey and 69% for the longer Visitor Survey.

Statistics Jersey
2 July 2020

Appendix – data tables

Table A1: January to March 2017 to 2020

Jan - Mar	2017	2018	2019	2020	Annual change
Total passengers	171,980	172,180	178,670	136,080	-24%
Total visits	80,110	77,220	94,910	61,380	-35%
Visitor expenditure	£18.29m	£23.28m	£26.07m	£16.15m	-38%

		2017		2018		2019		2020		Annual change	
		Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights
Topline	Overnight visits	74,700	321,160	68,540	255,850	84,540	271,440	54,570	218,440	-35%	-20%
	Day visits	5,410		8,680		10,370		6,810		-34%	

		3-year average 2017 to 2019		2019		2020		Annual change	
		Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights
Purpose of visit	**Total Holiday visits**	**38,530**		**44,300**		**19,650**		**-56%**	
	- Overnight visits	37,100	119,050	42,520	126,410	18,710	60,600	-56%	-52%
	- Day visits	1,430		1,780		940		-47%	
	Total Business visits	**19,580**		**19,320**		**20,050**		**4%**	
	- Overnight visits	14,740	52,220	14,240	40,360	15,300	45,430	7%	13%
	- Day visits	4,830		5,080		4,760		-6%	
	Total VFR visits	**17,060**		**18,660**		**17,090**		**-8%**	
	- Overnight visits	16,770	89,580	18,060	88,270	16,780	98,090	-7%	11%
	- Day visits	290		600		320		-48%	
	Total Other visits	**8,910**		**12,640**		**4,580**		**-64%**	
	- Overnight visits	7,310	21,810	9,730	16,410	3,780	14,320	-61%	-13%
	- Day visits	1,600		2,920		800		-73%	
Country of residence	UK	60,520	215,570	68,390	217,580	48,510	166,690	-29%	-23%
	Other CI	9,720	13,640	15,460	22,900	6,020	9,690	-61%	-58%
	Ireland	640	3,760	550	1,920	340	1,400	-39%	-27%
	France	8,550	20,610	6,600	6,960	4,110	15,650	-38%	125%
	Germany	420	1,810	140	580	90	540	-40%	-7%
	Other	4,230	27,430	3,770	21,510	2,320	24,470	-38%	14%
Mode of departure	Scheduled air	70,270	242,130	82,010	245,140	54,330	187,100	-34%	-24%
	Scheduled ferry	12,740	39,740	11,490	24,650	6,070	30,300	-47%	23%
	Private plane	810	810	1,120	1,120	900	900	-20%	-20%
	Visiting yachtsmen	270	410	290	530	90	150	-69%	-72%
	Cruise passengers	0	0	0	0	0	0	0%	0%
Duration of stay	Day visits	8,150		10,370		6,810		-34%	
	1-3 nights	48,740	101,970	60,300	118,690	35,970	74,110	-40%	-38%
	4 - 6 nights	19,380	84,070	16,000	70,990	11,990	53,580	-25%	-25%
	7 nights	3,470	23,990	3,940	27,400	2,080	14,570	-47%	-47%
	8+ nights	4,330	72,780	4,310	54,360	4,530	76,180	5%	40%