

**4insight**



## Background

This annual report covers the period January 2022 to December 2022.

Figures for 2022 are compared with the same period of 2019, as this reflects the most recent year in which travel was not impacted by the Covid-19 pandemic and is still being used as a benchmark year for the travel industry. Survey fieldwork ceased to be implemented in March 2020 due to the start of Covid-19 and the significant impact it had on travel. Survey research was not able to commence again until early 2022. Following the survey cessation, passenger numbers continued to be tracked; figures showed that the Covid-19 pandemic significantly impacted travel to and from the island throughout 2020, 2021 and early 2022. According to data provided by Ports of Jersey and Condor, passenger arrivals in Jersey during the first year of the pandemic (2020) were down by 79% compared to 2019.

In 2021 we were able to monitor visitor figures through the Government of Jersey's travel registration forms.

In December 2021 4insight took over the contract to administrate the Exit Survey and analyse/report on the data. The fieldwork and analysis processes were piloted during February 2022, fully launching in March 2022, although still with significant Covid-19 impact (for example Government and Ports of Jersey guidance to wear masks at all times and delays attaining airport airside passes for the interviewers).

Whilst the survey field research did not fully launch until March 2022, passenger numbers were still tracked throughout the first few months of the year. Visitor profile information for January and February has therefore been calculated by applying the same proportions as seen in the same period of 2019 to the actual number of passengers known for January and February 2022.

Total spend figures for 2022 have been calculated by multiplying the known average spend per person per night (March to December) by the estimated number of bed nights for January through to March 2022.

All figures in this report have been rounded independently to the nearest 10.

## Summary

### In 2022:

- there was a total of **869,510 departing passengers** (this includes departing residents) reflecting a recovery to three-quarters (73%) of the level recorded across calendar year 2019
- air travel **for departing passengers** showed a stronger recovery (77% recovery in terms of the number of departing passengers) than sea travel (61% recovery); whilst the number of passengers travelling on UK sea routes saw an increase in 2022 compared with the 2019, French and Channel Island Sea routes observed particularly low volumes compared to previous years
- the total number of **visits** to the island was **475,490**, recovering to 62% of 2019 levels; 75% of all visitors left on scheduled air services
- the number of **day trips** recorded was at a quarter (26%) of that seen in 2019, whilst **overnight visits (visits lasting at least one night)** showed a much stronger recovery to 60%; the day trip market has been significantly affected by the overall reduction in French visitors who make up more than two-fifths of the day trip market
- the average length of stay increased from 4.2 nights in 2019 to 4.9 nights in 2022 resulting in an 80% recovery in the total number of nights spent by visitors in Jersey
- day trip and shorter stay markets did not recover as strongly as longer stays; in the latest year the number of visits lasting 8 days or more increased by 3% compared to 2019; 50% of the longer stay (8+ days) market is made up of holiday makers and a further 40% is made up of people visiting friends and relatives
- breaking the visitor numbers down by **main purpose of visit**:
  - **holiday** visits accounted for 60% of all visits to the island (283,730) recovering to 55% of 2019 levels
  - **business** visits accounted for 11% of visits (54,040) recovering to 82% of previous levels; the number of nights spent on-island by business visitors increased by 7%
  - **visits to friends and family** accounted for 23% of visits (110,050), remaining consistent with 2019 levels (-3%); the number of nights spent by this visitor type increased by 15%

- breaking the visitor numbers down by **country of residence**:
  - visits from the **UK accounted for 76% of visits (359,000)** recovering to three quarters of 2019 levels (73%)
  - **other Channel Islands<sup>1</sup> (28,820)** recovered to 48% of previous levels and **France (40,190)** recovered to 30%
  - whilst smaller markets, visits from **Germany (76% recovery)** and **Ireland (90% recovery)** demonstrated the strongest recoveries in 2022
- in real terms (applying the December 2022 RPI to previous years data), **total on-island visitor expenditure** recovered to 76% of 2019 levels to £250 million
- **average spend per visitor per night** was £115, reflecting a decrease of around 5% in real terms compared to the same period of 2019 but similar to the average recorded for 2017 to 2019 (less than 1% difference)
- on-island **spend per visitor per visit** was £526 reflecting an increase of 22% in real terms since 2019; this is due to visitors staying longer on average in 2022
- 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 £138
- additional **visitor profile information**:
  - around half of adult visitors to Jersey (51%) were aged 55 or over
  - 13% of adult visitors were travelling with children under the age of 16
  - Around half (47%) of holiday visitors were visiting Jersey for the first time
- how **bookings** were made:
  - 22% of overnight visitors had booked an inclusive package
  - 60% of inclusive package visits were booked online
  - 70% of inclusive package visits were booked through a travel agent or tour operator
  - For those making independent bookings, 90% booked their accommodation and 95% booked their travel online
- type of **accommodation** stayed in and **activities** undertaken:
  - overall, seven out of ten (76%) of staying visitors stayed in commercial accommodation, a significantly lower proportion than that seen in previous years (2017 to 2019)
  - in comparison the proportion of visitors staying with friends and relatives in 2022 (23%) was significantly increased
  - the most popular activities amongst visitors were shopping for non-essential items and taking a self-guided walk with 62% of visitors having undertaken one or both of these activities whilst in Jersey
  - six out of ten visitors had used the public bus service
- **The visit experience**:
  - the **Net Promoter Score, (NPS)** for **holiday visitors** was 71, the highest annual score recorded since this measure was introduced in 2017
  - visitors rated Jersey generally as 4.7 out of a possible 5 again reflecting the highest score since at least 2017
  - the lowest rating at 3.8 was for Jersey's value for money however this is similar to in previous years (2017 to 2019) when it has fluctuated between 3.8 to 3.9.
  - 68% of visitors said that they would be likely to return within the next 2 years, with a further 24% saying they may return at some point in the future

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<sup>1</sup> Within the report "Other Channel Islands (CI)" refers to Guernsey and the other smaller islands within its Bailiwick

**Table A1: 2017 to 2022**

Full-year		<u>2017</u>		<u>2018</u>		<u>2019</u>		<u>2021</u>		<u>2022</u>		<u>Change 22/19</u>		<u>Change 22/21</u>
Total passengers		1,160,470		1,180,830		1,193,510		417,480		869,800		-27%		107%
Total visits		705,110		725,420		770,690		254,760		475,780		-38%		86%
		Visits	Nights	Visits	Nights	Visits	Nights	Visits		Visits	Nights	Visits	Nights	Visits
Topline	Overnight visits	604,880	2,868,170	617,660	2,719,290	645,550	2,737,630	246,450		443,870	2,183,920	-31%	-20%	79%
	Day visits	100,240		107,750		125,140		8,310		31,910		-74%		278%
		<b>3-year average 2017 to 2019</b>				<b>2019</b>		<b>2021</b>		<b>2022</b>		<b>Change 22/19</b>		<b>Change 22/21</b>
		Visits		Nights		Visits		Nights		Visits		Nights		Visits
Purpose of visit	<b>Total Holiday visits</b>	<b>495,050</b>		<b>514,620</b>		<b>154,360</b>		<b>284,020</b>		<b>-45%</b>		<b>83%</b>		
	- Overnight visits	423,890	1,914,660	439,150	1,918,290	149,350	264,360	1,329,690	-40%	-31%	76%			
	- Day visits	71,160		75,470		5,010	19,670		-74%		289%			
	<b>Total Business visits</b>	<b>73,540</b>		<b>66,110</b>		<b>22,980</b>		<b>54,040</b>		<b>-18%</b>		<b>134%</b>		
	- Overnight visits	55,910	193,000	50,050	138,810	20,660	47,310	151,100	-5%	9%	128%			
	- Day visits	17,630		16,060		2,320	6,730		-58%		189%			
	<b>Total VFR visits</b>	<b>107,410</b>		<b>112,950</b>		<b>63,820</b>		<b>110,050</b>		<b>-3%</b>		<b>72%</b>		
	- Overnight visits	105,810	540,540	110,730	544,560	63,300	109,110	627,900	-1%	15%	71%			
	- Day visits	1,600		2,220		520	940		-58%		79%			
	<b>Total Other visits</b>	<b>57,740</b>		<b>77,020</b>		<b>13,600</b>		<b>27,670</b>		<b>-64%</b>		<b>103%</b>		
- Overnight visits	37,080	126,680	45,620	135,980	13,140	23,310	75,210	-49%	-45%	5071%				
- Day visits	20,660		31,390		460			-86%		843%				
Country of residence	UK	472,290	2,137,490	493,990	2,146,870		359,290	1,731,160	-27%	-19%				
	Other CI	50,940	81,790	59,740	94,490		28,820	60,730	-52%	-36%				
	Ireland	9,000	48,630	8,250	45,900		7,430	42,800	-10%	-7%				
	France	128,460	159,810	135,550	138,940		40,190	102,770	-70%	-26%				
	Germany	19,970	103,800	20,950	95,750		15,970	75,920	-24%	-21%				
	Other	53,070	243,500	52,200	215,690		24,070	170,510	-54%	-21%				
Mode of departure	Scheduled air	505,230	2,210,920	534,640	2,244,740		355,360	1,675,650	-34%	-25%				
	Scheduled ferry	201,870	518,510	208,360	444,020		102,370	481,880	-51%	9%				
	Private plane	4,620	4,620	5,480	5,480		5,520	5,520	1%	1%				
	Visiting yachtsmen	18,220	40,970	18,580	43,370		10,210	20,870	-45%	-52%				
	Cruise passengers	3,800	0	3,630	0		2,330	0	-36%	0%				
Duration of stay	Day visits	111,040		125,140			31,910		-74%					
	1-3 nights	285,110	634,020	312,130	697,210		188,190	420,220	-40%	-40%				
	4 - 6 nights	189,200	853,420	188,070	851,590		136,760	634,580	-27%	-25%				
	7 nights	103,170	707,240	105,630	726,590		77,840	544,920	-26%	-25%				
	8+ nights	45,220	580,130	39,720	462,250		41,070	584,210	3%	26%				

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