

Background

This report covers the period January to March 2023. Throughout this report, visitor data for Quarter 1 2023 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. 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 in 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 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, going live 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). Because of this, comparable data for 2022 does not exist for the first quarter of the year.

All figures in this report have been rounded independently to the nearest 10 and so the figures in columns and rows may not always sum exactly to total figures presented in the tables or graphs.

For detailed information on sample sizes, statistical reliability and rounding, please refer to the Appendix I – Methodology.

Summary

In January to March 2023:

- there was a total of 142,590 **departing passengers** reflecting a recovery to 80% of 2019 levels and an increase of more than a quarter (26%) compared to the same period of 2022
- **visitors** (54,550) accounted for 38% of all departing passengers; whilst the number of departing visitors has recovered to 57% of 2019 levels, the number of other passengers (which includes residents, seasonal workers, transit passengers, etc.) has returned to pre-pandemic levels.
- the number of departing visitors was 14% higher than in Q1 2022
- breaking the visitor numbers down by **travel method**:
 - visits on **scheduled air** routes accounted for 86% of all visits (46,750), increasing by 10% compared to Q1 2022
 - visits on **scheduled ferry** services accounted for 12% of all visits (6,780), reflecting an increase of more than a half (+56%) compared to the 2022
- breaking the visitor numbers down by **main purpose of visit**:
 - **holiday** visits accounted for less than a third (32%) of all visits to the island (17,520), remaining relatively consistent with Q1 2022 (+4%) and recovered to 40% of 2019 levels
 - **business** visits accounted for 25% of all visits (13,700), reflecting an increase of 12% compared to 2022 and recovered to 71% of 2019 levels
 - **there were more visits to see friends and family** (18,370) than for holiday purposes; visits to see friends and relatives accounted for 34% of all visits, reflecting an annual increase of 18% and on par with 2019 (-2%)
 - **visits for other purposes** accounted for 9% of visits (4,960) reflecting an increase of 59% on an annual basis and a recovery of 39% of 2019 levels
- breaking the visitor numbers down by **country of residence**:
 - visits from the **UK (42,270) increased by 7%** compared to Q1 2022 and accounted for 78% of all visits. Compared to 2019 UK visits recovered to 62%.

- visits from the **other Channel Islands¹ (5,430) increased by 15%** on an annual basis and accounted for a tenth (10%) of visits. Compared to 2019 Channel Island visits recovered to 35%.
- **visits from France (3,820) more than doubled (141%)** when compared to the same period of 2022 and accounted for 7% of all visits. Compared to 2019, visits from France recovered to 58%.
- the total number of **overnight visitors (those who stayed at least one night) (50,150) and the number of day visitors (4,410)** showed similar annual increases (14% and 11% respectively)
- the average length of stay (4.2) was almost identical to in Q1 2022 but remained a night longer on average than in the same period of 2019 (3.2)
- the total number of **nights spent in Jersey** by visitors (212,280) increased by 16% since Q1 2022, and recovered to 78% of 2019 levels
- in real terms (applying the March 2023 RPI to previous years data), **total on-island visitor expenditure** increased by 4% compared to 2022 and now reflects a recovery to 76% of pre-pandemic (2019) levels
- **average spend per visitor per night** was £116, remaining relatively consistent since Q1 2018 (applying the March 2023 RPI to previous years data),
- on-island **spend per visit** was £449 and whilst marginally lower than in Q1 2022 (-9%) it remains significantly higher (+32%) than in 2019 due to the longer average length of stay by visitors (applying the March 2023 RPI to previous years data),
- 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 £111
- **additional visitor profile information:**
 - 37% of adult visitors to Jersey were aged 55 or over, a lower proportion than observed across 2022 when it was closer to a half
 - in comparison the proportion of 16 to 24 year olds (17%) was higher in the first quarter of 2023 than observed over the previous 3 quarters
 - 9% of adult visitors were travelling with children under the age of 16
 - 31% of visitors were visiting Jersey for the first time
- **how bookings** were made:
 - 17% of staying visitors had booked an inclusive package
 - Around two-thirds (62%) of inclusive package visits were booked online
 - 56% of inclusive package visits were booked through a travel agent or tour operator
 - For those making independent bookings, 87% booked their accommodation and travel online
- type of **accommodation** stayed in and **activities** undertaken:
 - overall, seven out of ten (71%) of staying visitors stayed in commercial accommodation, a significantly lower proportion than that seen in the same period of 2019 (83%)
 - Nearly a third (28%) of all visitors stayed with friends and relatives, a significantly higher proportion than seen in the same period of 2019 (17%).
 - shopping for non-essential items remains the most popular activity amongst visitors, with three-quarters (76%) of visitors reporting to have engaged in this activity whilst in Jersey
- **The visit experience:**
 - the **Net Promoter Score, (NPS)** for **holiday visitors** was 78, the highest score recorded in any quarter since this measure was introduced in 2017
 - visitors rated Jersey generally as 4.6 out of a possible 5 on average; the highest ratings for Jersey's attributes were given for safety and security, cleanliness and accommodation all of which had average ratings of 4.7 out of 5
 - the lowest rating at 3.7 was for Jersey's value for money however this is similar to in previous years

(2017 to 2019) when it has fluctuated between 3.7 to 3.8.

- 76% of visitors said that they would be likely to return within the next 2 years and a further 20% said they may return at some point in the future

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

Appendix II – data tables

Table A1: January to March 2017 to 2023

Q1		3-year average 2017 to 2019		2019		2022		2023		Change 23/19		Change 23/22	
Total passengers		174,280		178,670		112,390		142,590		-20%		27%	
Total visits		84,080		94,910		47,790		54,550		-43%		14%	
		Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights
	Overnight visits	75,930	282,820	84,542	255,850	43,820	182,560	50,150	212,280	-41%	-22%	14%	16%
	Day visits	8,150		10,370	3.03	3,970	4.17	4,410	4.23	-58%		11%	
		3-year average 2017 to 2019		2019		2022		2023		Change 23/19		Change 23/22	
		Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights
	Total Holiday visits	38,530		44,300		16,900		17,520		-60%		4%	
	- Overnight visits	37,100	119,050	42,520	126,410	16,340	60,540	16,440	55,310	-61%	-56%	1%	-9%
	- Day visits	1,430		1,780		570		1,090	3.4	-39%		92%	
	Total Business visits	19,580		19,320		12,210		13,700		-29%		12%	
	- Overnight visits	14,740	52,220	14,240	40,360	10,320	32,620	12,120	41,640	-15%	3%	17%	28%
	- Day visits	4,830		5,080		1,890		1,580	3.4	-69%		-17%	
	Total VFR visits	17,060		18,660		15,550		18,370		-2%		18%	
	- Overnight visits	16,770	89,580	18,060	88,270	15,330	83,830	18,190	106,480	1%	21%	19%	27%
	- Day visits	290		600		220		180	5.9	-70%		-17%	
	Total Other visits	8,910		12,640		3,130		4,960		-61%		59%	
	- Overnight visits	7,310	21,810	9,730	16,410	1,830	5,580	3,400	8,860	-65%	-46%	86%	59%
	- Day visits	1,600		2,920		1,300		1,560	2.6	-46%		20%	
Country of residence	UK	60,520	215,570	68390	217580	39,530	151,470	42,270	162,390	-38%	-25%	7%	7%
	Other CI	9,720	13,640	15460	22900	4,720	9,230	5,430	8,590	-65%	-63%	15%	-7%
	Ireland	640	3,760	550	1920	200	880	250	890	-56%	-54%	25%	1%
	France	8,550	20,610	6600	6960	1,580	5,450	3,820	10,650	-42%	53%	141%	95%
	Germany	420	1,810	140	580	100	360	160	810	14%	38%	59%	124%
	Other	4,230	27,430	3770	21510	1,660	15,180	2,640	28,960	-30%	35%	59%	91%
Mode of departure	Scheduled air	70,270	242,130	82010	245140	42,310	157,400	46,750	183,600	-43%	-25%	10%	17%
	Scheduled ferry	12,740	39,470	11490	24650	4,340	23,940	6,780	27,480	-41%	12%	56%	15%
	Private plane	810	810	1120	1120	980	980	900	900	-20%	-20%	-8%	-8%
	Visiting yachtsmen	270	410	290	530	150	240	130	300	-54%	-44%	-11%	27%
	Cruise passengers	0	0	0	0	0	0	0	0	0%		0%	
Duration of stay	Day visits	8,150		10,370	0	3,970		4,410		-58%		11%	
	1-3 nights	48,740	101,970	60300	118690	27,440	60,590	32,400	67,750	-46%	-43%	18%	12%
	4 - 6 nights	19,380	84,070	16000	70990	10,160	45,570	11,110	49,430	-31%	-30%	9%	8%
	7 nights	3,470	23,990	3940	27400	2,470	17,290	2,300	16,120	-41%	-41%	-7%	-7%
	8+ nights	4,330	72,780	4310	54360	3,750	59,110	4,340	78,980	1%	45%	16%	34%