

# 4insight

## Background

This report covers the period April to June 2023. Throughout this report, visitor data for Quarter 2 2023 are compared with the same period of 2019 (as the most recent year in which travel was not impacted by the Covid-19 pandemic) and to Quarter 2 2022 (i.e. to identify annual trends).

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).

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 April to June 2023:

- there was a total of 289,100 **departing passengers** reflecting a recovery to 82% of 2019 levels and an increase of 16% compared to the same period of 2022
- **visitors** (169,840) accounted for 59% of all departing passengers reflecting a similar proportion to that observed in Q2 2022 but a lower proportion than that observed pre-pandemic (66% between 2017 to 2019)
- the total number of departing visitors was 14% higher than in Q2 2022
- whilst the number of departing visitors has recovered to 70% of 2019 levels, the number of other passengers (e.g. residents) is marginally higher than in Q2 2019
- breaking the visitor numbers down by **travel method**:
  - visits on **scheduled air** routes accounted for 69% of all visits (116,020); the number of visits made by scheduled air services has increased by 6% compared to Q2 2022
  - visits on **scheduled ferry** services accounted for 28% of all visits (47,400); the number of visits made by scheduled ferry services increased by more than a third (+35%) compared to the same period of 2022
- breaking the visitor numbers down by **main purpose of visit**:
  - the number of **holiday visits** (110,800) has increased by 20% on an annual basis and has recovered to 68% of 2019 levels
  - the number of **business visits** (15,190) remained consistent with 2022 (+2%) and with the same period of 2019 (-3%)
  - the number of **visits to see friends and family** (30,630) increased by 12% compared with 2022 and by 9% compared to 2019
- breaking the visitor numbers down by **country of residence**:
  - visits from the **UK (42,270)** have remained relatively consistent with the previous year (+4%) and accounted for 67% of all visits; compared to Q2 2019 UK visits have recovered to 77%

- visits from the **other Channel Islands<sup>1</sup> (11,500)** increased by 12% on an annual basis but remain at 58% of 2019 levels.
- **visits from France (29,390)** more than doubled (108%) when compared to the same period of 2022 and have recovered to 58% of 2019 levels.
- the total number of **overnight visitors (those who stayed at least one night) (148,770)** increased by 6% whilst the **number of day visitors (21,070)** more than doubled (142%)
- the average length of stay (4.4) for all those visitors who stayed at least one night was similar to in Q2 2022 (4.5) and to the three year average recorded across 2017 to 2019 (4.4)
- the total number of **nights spent in Jersey** by visitors (654,600) increased marginally by 4% compared to Q2 2022 and has recovered to 80% of the level recorded in 2019
- in nominal terms, total on-island visitor expenditure (£79 million) increased by 4% on an annual basis
- in real terms (applying the June 2023 RPI to previous years data), **total on-island visitor expenditure** decreased by 6% compared with Q2 2022 and has recovered to 72% of 2019 levels
- for those travelling independently, i.e. where travel can be costed separately to other elements of a visit to Jersey, the **average return fare per person** was £130
- **additional visitor profile information:**
  - 46% of adult visitors to Jersey were aged 55 or over; only 4% were aged between 16 to 24
  - 11% of adult visitors were travelling with children under the age of 16
  - 39% of visitors were visiting Jersey for the first time
- **how bookings were made:**
  - 19% of staying visitors had booked an inclusive package
  - around two-thirds (64%) of inclusive package visits were booked online
  - 63% of inclusive package visits were booked through a travel agent or tour operator
  - for those making independent bookings, 86% booked their accommodation online and 93% booked their travel online
- **type of accommodation stayed in and activities undertaken:**
  - overall, eight out of ten (81%) of staying visitors stayed in commercial accommodation, a lower proportion than that seen in the same period of 2019 (89%)
  - nearly a fifth (19%) of all visitors stayed with friends and relatives, a higher proportion than that seen in the same period of 2019 (10%).
  - shopping for non-essential items remains the most popular activity amongst visitors, with 70% of visitors reporting to have engaged in this activity whilst in Jersey
- **The visit experience:**
  - the **Net Promoter Score, (NPS)** for **holiday visitors** was 72, the highest score recorded in the second quarter of the year since at least 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 beaches
  - the lowest average rating was given for Jersey's value for money (3.7)
  - 68% 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.

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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.

## Appendix II – data tables

**Table A1: April to June 2017 to 2023**

Q2		<u>3-year average 2017 to 2019</u>		<u>2019</u>		<u>2022</u>		<u>2023</u>		<u>Change 23/19</u>		<u>Change 23/22</u>	
Total passengers		348,670		353,090		249,640		289,100		-18%		16%	
Total visits		230,120		241,590		149,240		169,840		-30%		14%	
		Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights
	Overnight visits	187,300	808,390	193,876	742,530	140,550	630,350	148,770	654,600	-23%	-19%	6%	4%
	Day visits	42,820		47,710		8,690		21,070		-56%		142%	
0.81													
		<u>3-year average 2017 to 2019</u>		<u>2019</u>		<u>2022</u>		<u>2023</u>		<u>Change 23/19</u>		<u>Change 23/22</u>	
		Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights
	Total Holiday visits	158,500		162,290		92,450		110,800		-32%		20%	
	- Overnight visits	134,980	605,250	140,080	615,200	87,060	410,840	94,420	414,520	-33%	-33%	8%	1%
	- Day visits	23,520		22,210		5,390		16,390		-26%		204%	
	Total Business visits	17,250		15,730		14,910		15,190		-3%		2%	
	- Overnight visits	13,050	42,370	11,150	34,310	13,160	38,380	13,430	39,220	20%	14%	2%	2%
	- Day visits	4,200		4,580		1,750		1,760		-62%		1%	
	Total VFR visits	27,680		28,050		27,430		30,630		9%		12%	
	- Overnight visits	27,270	129,190	27,250	129,400	27,070	143,960	30,210	160,430	11%	24%	12%	11%
	- Day visits	410		790		360		430		-46%		18%	
	Total Other visits	26,690		35,520		14,440		13,220		-63%		-8%	
	- Overnight visits	12,000	31,570	15,400	34,130	13,230	37,170	10,710	40,440	-30%	18%	-19%	9%
	- Day visits	14,700		20,120		1,210		2,500		-88%		107%	
Country of residence	UK	137,690	611,030	147,820	633,230	109,850	498,670	114,250	510,440	-23%	-19%	4%	2%
	Other CI	14,670	21,910	16,850	23,130	10,290	21,640	11,500	22,350	-32%	-3%	12%	3%
	Ireland	2,570	12,260	2,640	12,390	2,100	10,250	2,490	13,600	-5%	10%	19%	33%
	France	48,720	44,650	50,390	40,270	14,140	32,460	29,390	38,240	-42%	-5%	108%	18%
	Germany	7,280	38,320	8,430	44,060	5,640	26,190	3,830	21,590	-54%	-51%	-32%	-18%
	Other	19,190	80,210	15,460	59,970	7,220	41,130	8,370	48,380	-46%	-19%	16%	18%
Mode of departure	Scheduled air	148,920	645,290	159,110	667,050	109,650	476,600	116,020	518,490	-27%	-22%	6%	9%
	Scheduled ferry	72,790	149,090	73,700	130,230	35,160	148,390	47,400	125,200	-36%	-4%	35%	-16%
	Private plane	1,260	1,260	1,570	1,570	1,630	1,630	1,510	1,510	-4%	-4%	-8%	-8%
	Visiting yachtsmen	5,830	12,740	6,030	14,170	2,040	3,730	4,610	9,400	-24%	-34%	126%	152%
	Cruise passengers	1,320	0	1,170	0	760	0	310	0	-73%		0%	
Duration of stay	Day visits	42,820		47,710		8,690		21,380		-55%		146%	
	1-3 nights	84,630	198,850	89,550	210,940	63,020	139,570	70,490	158,500	-21%	-25%	12%	14%
	4 - 6 nights	63,380	286,250	64,810	290,100	46,860	216,330	45,800	208,520	-29%	-28%	-2%	-4%
	7 nights	30,010	206,440	30,820	212,450	21,910	153,360	24,100	168,710	-22%	-21%	10%	10%
	8+ nights	9,270	116,850	8,700	99,550	8,760	121,080	8,070	118,880	-7%	19%	-8%	-2%