

# 4insight

## Background

This report covers the period July to September 2023. Throughout this report, visitor data for Quarter 3 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 3 2022 (i.e. to identify annual trends). It should be noted that 2019 reflected a peak in terms of island tourism, with visitor numbers far surpassing levels recorded in previous years.

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.

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.

## Summary

### In July to September 2023:

- there was a total of 357,790 **departing passengers** reflecting a recovery to 83% of 2019 levels and an increase of 10% compared to the same period of 2022.
- **visitors** (216,870) accounted for 61% of all departing passengers reflecting a similar proportion to that observed in Q3 2022 (60%) but a lower proportion than that observed in 2019 when the proportion was closer to 70%.
- the total number of departing visitors was 12% higher than in Q3 2022 and had recovered to 70% of 2019 levels.
- whilst the number of departing visitors has not fully recovered, the number of other passengers (e.g. residents, seasonal workers and visitors in transit) departing from Jersey's ports has surpassed 2019 levels.
- breaking the visitor numbers down by **travel method**:
  - visits on **scheduled air** routes accounted for 70% of all visits (151,710); the number of visits made by scheduled air services has increased by 13% compared to Q3 2022
  - visits on **scheduled ferry** services accounted for a quarter (25%) of all visits (55,090); the number of visits made by scheduled ferry services increased by 11% compared to the same period of 2022
  - when compared to Q3 2019 the recovery has been stronger for the number of scheduled air visitors (79%) compared to number of scheduled sea visitors (54% recovery compared to Q3 2019).
- breaking the visitor numbers down by **main purpose of visit**:
  - the number of **leisure visits** (148,590) has increased by 7% on an annual basis and has recovered to 63% of 2019 levels
  - the number of **business visits** (14,030) has increased by more than a quarter (28%) compared to Q3 2022 and has recovered to a similar level to that seen in the same quarter of 2019 (-2%).
  - the number of **visits to see friends and family** (49,020) increased by fifth when compared to both Q3 2022 (22%) and to Q3 2019 (19%).
- breaking the visitor numbers down by **country of residence**:

- visits from the **UK (157,750)** have increased by 9% on an annual basis and accounted for 73% of all visits; compared to Q3 2019 UK visits have recovered to 84%
- visits from the **other Channel Islands<sup>1</sup> (9,360)** increased by a third (35%) an annual basis but remain at 62% of 2019 levels.
- **visits from France (27,990)** increased by 57% on an annual basis but remain at less than half 43% of 2019 levels.
- the proportion of visits that involved a stay in Jersey of at least one night was 94%, a higher proportion than that observed from 2017 to 2019 when the average proportion was 84%
- the total number of **overnight visitors (those who stayed at least one night) (203,500)** increased by 12% compared to the same period of 2022, whilst the **number of day visitors (13,380)** increased by 3%. The loss of cruise ships visiting the island in the latest year (only 3 ships visited Jersey in 2023) has impacted the overall recovery of the day trip market.
- Whilst the increase in day visits was marginal on an annual basis, the number of French day visits almost doubled (increase of 89% compared to Q3 2022).
- the average length of stay (5.3) for all those visitors who stayed at least one night has fallen since Q3 2022 when it was 5.7 nights but remains higher than the three year average recorded for 2017 to 2019 (5.0).
- the total number of **nights spent in Jersey** by visitors (**1,072,340**) increased marginally by 4% compared to Q3 2022 and has recovered to 85% of the level recorded in 2019.
- in nominal terms, total on-island visitor expenditure (**£147 million**) increased by 24% on an annual basis
- in real terms (applying the September 2023 RPI to previous years data), **total on-island visitor expenditure** increased by 13% compared with Q3 2022 and has recovered to 92% of 2019 levels.
- spend per visit has remained relatively consistent since Q3 2022 (+1%) however spend per visitor night has increased by 9% since the same period of 2022, largely attributed to increases in expenditure on accommodation and packaged holidays.
- 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 £138.
- **additional visitor profile information:**
  - 45% of adult visitors to Jersey were aged 55 or over; 7% were aged between 16 to 24
  - 16% of adult visitors were travelling with children under the age of 16
  - almost half (49%) of visitors were visiting Jersey for the first time
- **how bookings were made:**
  - 27% of staying visitors had booked an inclusive package, a higher proportion than that recorded in Q3 2022
  - around 56% of inclusive package visits were booked online
  - more than three-quarters (78%) of inclusive package visits were booked through a travel agent or tour operator
  - for those making independent bookings, 90% booked their accommodation online and 93% booked their travel online
- **type of accommodation stayed in and activities undertaken:**
  - 88% of staying visitors stayed in commercial accommodation, a significantly higher proportion than has been observed since this survey recommenced following the pandemic in 2022
  - around a tenth (11%) of all visitors stayed with friends and relatives, returning to the level similar to that observed in Q3 2019 (13%)
  - 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 68, a marginally lower score than that observed in the same period of 2022 when it was 71
    - visitors rated Jersey generally as 4.7 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)
    - 64% of visitors said that they would be likely to return within the next 2 years and a further 22% 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: July to September 2017 to 2023**

Q3		3-year average 2017 to 2019		2019		2022		2023		Change 23/19		Change 23/22	
Total passengers		427,020		430,600		326,310		357,790		-17%		10%	
Total visits		299,720		309,980		194,060		216,870		-30%		12%	
		Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights
	Overnight visits	251,610	1,267,150	256,073	1,266,740	181,080	1,032,790	203,500	1,072,340	-21%	-15%	12%	4%
	Day visits	48,110		53,910		12,980		13,380		-75%		3%	
		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
	<b>Total Holiday visits</b>	<b>232,070</b>		<b>237,480</b>		<b>138,750</b>		<b>148,590</b>		<b>-37%</b>		<b>7%</b>	
	- Overnight visits	191,680	967,240	193,580	947,670	127,270	719,380	137,590	711,050	-29%	-25%	8%	-1%
	- Day visits	40,390		43,910		11,480		10,990		-75%		-4%	
	<b>Total Business visits</b>	<b>17,720</b>		<b>14,280</b>		<b>10,970</b>		<b>14,030</b>		<b>-2%</b>		<b>28%</b>	
	- Overnight visits	13,920	45,200	11,820	27,810	9,990	34,410	12,340	41,840	4%	50%	24%	22%
	- Day visits	3,800		2,450		980		1,690		-31%		72%	
	<b>Total VFR visits</b>	<b>37,840</b>		<b>41,360</b>		<b>40,040</b>		<b>49,020</b>		<b>19%</b>		<b>22%</b>	
	- Overnight visits	37,490	211,420	41,010	224,860	39,870	258,450	48,580	296,250	18%	32%	22%	15%
	- Day visits	350		350		160		440		28%		170%	
	<b>Total Other visits</b>	<b>12,080</b>		<b>16,870</b>		<b>4,310</b>		<b>5,240</b>		<b>-69%</b>		<b>22%</b>	
- Overnight visits	8,520	43,300	9,670	57,630	4,200	20,540	4,990	23,210	-48%	-60%	19%	13%	
- Day visits	3,560		7,200		110		250		-97%		121%		
Country of residence	UK	187,190	982,120	187,690	974,870	144,860	813,950	157,750	841,190	-16%	-14%	9%	3%
	Other CI	15,130	27,400	14,990	26,790	6,920	17,850	9,360	27,340	-38%	2%	35%	53%
	Ireland	4,620	26,960	4,550	28,910	4,220	27,100	3,860	22,600	-15%	-22%	-9%	-17%
	France	57,430	71,240	62,950	69,020	17,840	46,630	27,990	61,600	-56%	-11%	57%	32%
	Germany	10,990	55,910	11,100	46,050	9,050	44,060	7,370	43,500	-34%	-6%	-19%	-1%
	Other	24,340	103,520	28,710	112,340	11,180	83,190	10,530	76,100	-63%	-32%	-6%	-9%
Mode of departure	Scheduled air	188,590	973,140	192,330	987,390	133,770	763,250	151,710	805,260	-21%	-18%	13%	6%
	Scheduled ferry	95,730	266,120	101,790	241,090	49,410	251,740	55,090	245,050	-46%	2%	11%	-3%
	Private plane	1,470	1,470	1,720	1,720	1,790	1,790	1,580	1,580	-9%	-9%	-12%	-12%
	Visiting yachtsmen	11,440	26,420	11,690	27,770	7,530	16,010	8,510	20,460	-27%	-26%	13%	28%
	Cruise passengers	2,490	0	2,450	0	1,560	0	0	0	-100%		0%	
Duration of stay	Day visits	48,110		53,910		12,980		13,380		-75%		3%	
	1-3 nights	88,190	192,760	92,250	210,620	55,000	126,230	79,380	183,260	-14%	-13%	44%	45%
	4 - 6 nights	76,750	350,950	78,960	362,390	57,340	269,830	60,020	281,040	-24%	-22%	5%	4%
	7 nights	61,060	417,440	62,450	427,850	45,980	321,840	40,980	286,880	-34%	-33%	-11%	-11%
	8+ nights	25,610	306,010	22,420	257,100	22,770	314,890	23,110	321,170	3%	25%	2%	2%