⁴insight

Background

This annual report covers the period January 2023 to December 2023.

This methodology is modelled on the International Passenger Survey conducted by the UK Office for National Statistics. Passengers are selected randomly to take part in face to face interviews as they are leaving Jersey's ports. There are two elements; the Passenger Calibration Survey and the more comprehensive Visitor Exit Survey.

The Passenger Calibration Survey reflects a short set of questions designed to break down (or calibrate) departing passengers. This short survey provides a profile of passengers leaving Jersey e.g. the proportion that are tourism visitors vs the proportion who are residents travelling off-island.

Alongside the Passenger Calibration Survey, separate interview shifts are allocated to a longer and more detailed survey of visitors departing from Jersey at the end of their stay. The Visitor Exit Survey ask questions of visitors about their spend whilst in Jersey, about their characteristics e.g., their age and what they are looking for in a travel experience and how they would rate their stay on the island.

Throughout this report, annual figures for 2023 are compared with 2022 to present annual change and with 2019, as the latter 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 Ferries, passenger arrivals in Jersey during the first year of the pandemic (2020) were at around a fifth (21%) of the level recorded in 2019. 4insight took over the project, and full launched in March 2022.

The sample size for the Passenger Calibration Survey represents **13%** of total departing passengers on scheduled air and sea services in 2023.The sample size for the Visitor Exit Survey represents **3%** of departing visitors on scheduled air and sea services in 2023.

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 more information about data collection methods, statistical reliability, passenger profile estimation and weighting please contact info@visitjersey.je.

Summary

In 2023:

- there was a total of **990,020 departing passengers** (this includes departing residents) reflecting a recovery to 83% of the level recorded across calendar year 2019 and an increase of 14% on an annual basis.

- Whilst the number of passengers travelling on scheduled sea services has not yet shown the same recovery to pre-pandemic levels that has been observed for scheduled air services, on an annual basis, there has been a significant increase in the number of passengers travelling by ferry which was 28% higher than that recorded in the previous year.

- 53% of all departing passengers were classified as visitors at the end of their stay. This is marginally lower than the proportion seen in 2022 when it was 55% and significantly lower than that seen in 2019 when it was 65%.

- the number of other departing passengers[1] (463,500) exceeded the number recorded in 2019 (422,820) suggesting that island residents are travelling more frequently than pre-pandemic.

- the total number of **visits** to the island was **526,520,** recovering to 68% of 2019 levels and increasing by 11% compared to 2022.

- the average party size for visitors to Jersey was 2.1; departing visitor party sizes were marginally higher for

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[1] *Other departing passengers reflects largely residents but also some seasonal and longer term workers as well as passengers in transit and a small number of returning visitors.*

visitors from France and Germany (close to an average of 3 visitors) compared to visitors from the UK, Ireland and Channel Islands where the average party size was around 2.

- the number of **day trips** recorded in 2023 increased by almost half (45%) compared to 2022 however it remains at 37% of 2019 levels.

- in comparison, the **overnight** market (visitors staying at least one day) showed moderate growth (+8%) compared to 2022, and returned to three-quarters (74%) of 2019 levels.

- the average length of stay (for those staying at least one night) decreased marginally in the latest year from 4.9 nights in 2022 to 4.7 in 2023; it remains half a night longer on average than that recorded in 2019 (4.2 nights).

- in 2023 the total number of visitor nights was 2,268,330 reflecting an 83% recovery when compared to 2019.

- whilst there has been little annual change in the number of visits lasting 8 days or longer, the volume remains 3% higher than that recorded 2019; in comparison the number of visits lasting for 1 to 3 days has increased significantly in the latest year (+20%) but remains at 72% of the level seen in 2019.

- breaking the visitor numbers down by **main purpose of visit**:
  o **leisure** visits accounted for 61% of all visits to the island (321,720) recovering to 63% of 2019 levels
  o **business** visits accounted for 11% of visits (56,500) recovering to 85% of previous levels; the number of nights spent on-island by business visitors increased by 21%
  o **visits to friends and family** accounted for 22% of visits (117,370), marginally higher (+4%) than in 2019; the number of nights spent by this visitor type increased by 22% since before the pandemic

- breaking the visitor numbers down by **country of residence**:
  o visits from the **UK accounted for 73% of visits (373,910)** recovering to three quarters of 2019 levels (76%)
  o visits from the **other Channel Islands[2] (33,430)** remain at 56% of 2019 levels
  o **visits from France (74,830)** almost doubled (+83%) on an annual basis but remain at 55% of 2019 levels
  o visits from **Germany (11,980)** fell by a quarter in the latest year after showing strong recovery in 2022; in the latest year, the number of visits from Germany were at 57% of 2019 levels
  o whilst a smaller market, visits from **Ireland** demonstrated the strongest recovery in 2023 to 92% of 2019 levels

- in real terms (applying the December 2023 RPI to previous years data), **total on-island visitor expenditure** recovered to 83% of 2019 levels to £290 million.

- **average spend per visitor per night** was £128, an almost identical value to that recorded in 2022 and in 2019 (in real terms, applying the Dec 2023 RPI to previous years).

- on-island **spend per visitor per visit** was £550 reflecting a decrease of 6% in real terms on an annual basis but an increase of 22% when compared to 2019; this is due to visitors staying longer on average in last two years.

- 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 £130 (it was similar for both sea and air).

- additional **visitor profile information:**
  o around half of adult visitors to Jersey (48%) were aged 55 or over
  o 13% of adult visitors were travelling with children under the age of 16
  o Two-fifths of leisure visitors were visiting Jersey for the first time

- how **bookings** were made:
  o 22% of overnight visitors had booked an inclusive package
  o 60% of inclusive package visits were booked online
  o 70% of inclusive package visits were booked through a travel agent or tour operator

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

- For those making independent bookings, 88% booked their accommodation and 93% booked their travel online

- type of **accommodation** stayed in and **activities** undertaken:
  - overall, seven out of ten (83%) of staying visitors stayed in commercial accommodation, returning to level seen in previous years (2017 to 2019)
  - The average costs of accommodation[3] per person per night increased from, £83 in 2022 to £96 in 2023 (+16%).
  - the most popular activities amongst visitors were shopping for non-essential items and taking a self-guided walk
  - The proportion of visitors engaging in sea-based activities was down in the latest year

- The **visit experience**:
  - the **Net Promoter Score, (NPS)** for **leisure visitors** was 71 the same as the previous year
  - visitors rated Jersey's value for money at 3.7 out of 5.0 on average, reflecting the lowest average rating on this attribute since at least 2017
  - 69% of visitors said that they would be likely to return within the next 2 years, with a further 20% saying they may return at some point in the future

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[3] *The average cost of accommodation is based on reported expenditure by departing visitors on hotels, self-catering accommodation, airbnb, campsites, hostels, guest houses and other forms of commercial accommodation.*

Data table

Table A1: 2017 to 2023

Yearly	3-year average 2017 to 2019	2019	2021	2022	2023	Change 23/19	Change 23/22
Total passengers	1,178,270	1,193,510	417,504	869,800	990,020	-17%	14%
Total visits	733,740	770,690	254,760	475,780	526,520	-32%	11%

		3-year average 2017 to 2019		2019		2021	2022		2023		Change 23/19		Change 23/22	
		Visits	Nights	Visits	Nights	Visits	Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights
	Overnight visits	622,700	2,775,030	645,547	2,737,631	246,450	443,870	2,183,920	480,110	2,268,330	-26%	-17%	8%	4%
	Day visits	111,040		125,140		8,310	31,910		46,410		-63%		45%	

		3-year average 2017 to 2019		2019		2021	2022		2023		Change 23/19		Change 23/22	
		Visits	Nights	Visits	Nights	Visits	Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights
	Total Leisure visits	**495,050**		**514,620**		**154,360**	**284,020**		**321,720**		**-37%**		**13%**	
	- Overnight visits	423,890	1,914,660	439,150	1,918,290	149,350	264,360	1,329,690	287,710	1,332,420	-34%	-31%	9%	0%
	- Day visits	71,160		75,470		5,010	19,670		34,010		-55%		73%	
	Total Business visits	**73,540**		**66,110**		**22,980**	**54,040**		**56,500**		**-15%**		**5%**	
	- Overnight visits	55,910	193,000	50,050	138,810	20,660	47,310	151,100	50,150	167,850	0%	21%	6%	11%
	- Day visits	17,630		16,060		2,420	6,730		6,350		-60%		-6%	
	Total VFR visits	**107,410**		**112,950**		**63,820**	**110,050**		**117,370**		**4%**		**7%**	
	- Overnight visits	105,810	540,540	110,730	544,560	63,300	109,110	627,900	115,930	674,210	5%	24%	6%	7%
	- Day visits	1,600		2,220		520	940		1,440		-35%		53%	
	Total Other visits	**57,740**		**77,020**		**13,600**	**27,670**		**30,940**		**-60%**		**12%**	
	- Overnight visits	37,080	126,680	45,620	135,980	13,140	23,310	75,210	26,310	93,860	-42%	-31%	13%	25%
	- Day visits	20,660		31,390		460	4,350		4,630		-85%		6%	
Country of residence	UK	472,290	2,137,490	493,990	2,146,870		359,290	1,731,160	373,910	1,764,000	-24%	-18%	4%	2%
	Other CI	50,940	81,790	59,740	94,490		28,820	60,730	33,430	74,680	-44%	-21%	16%	23%
	Ireland	9,000	48,630	8,250	45,900		7,430	42,800	7,570	43,070	-8%	-6%	2%	1%
	France	128,460	159,810	135,550	138,940		40,190	102,770	74,830	134,320	-45%	-3%	86%	31%
	Germany	19,970	103,800	20,950	95,750		15,970	75,920	11,980	69,120	-43%	-28%	-25%	-9%
	Other	53,070	243,500	52,200	215,690		24,070	170,510	24,800	183,140	-52%	-15%	3%	7%
Mode of departure	Scheduled air	505,230	2,210,920	534,640	2,244,740		355,360	1,675,650	376,390	1,767,780	-30%	-21%	6%	5%
	Scheduled ferry	201,870	518,510	208,360	444,020		102,370	481,880	131,130	464,700	-37%	5%	28%	-4%
	Private plane	4,620	4,620	5,480	5,480		5,520	5,520	4,930	4,930	-10%	-10%	-11%	-11%
	Visiting yachtsmen	18,220	40,970	18,580	43,370		10,210	20,870	13,760	30,920	-26%	-29%	35%	48%
	Cruise passengers	3,800	0	3,630	-		2,330	0	310	0	0%		0%	
Duration of stay	Day visits	111,040		125,140	-		31,910		46,720		-63%		46%	
	1-3 nights	285,110	634,020	312,130	697,210		188,190	420,220	226,070	500,590	-28%	-28%	20%	19%
	4 - 6 nights	189,200	853,420	188,070	851,590		136,760	634,580	139,780	639,800	-26%	-25%	2%	1%
	7 nights	103,170	707,240	105,630	726,590		77,840	544,920	73,670	515,370	-30%	-29%	-5%	-5%
	8+ nights	45,220	580,130	39,720	462,250		41,070	584,210	40,960	612,560	3%	33%	0%	5%