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.

For more information about data collection methods, passenger profile estimation and weighting please see Appendix I – Methodology.

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 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.

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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.*

- the average party size for visitors to Jersey was 2.1; departing visitor party sizes were marginally higher for 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**:
  - **leisure** visits accounted for 61% of all visits to the island (321,720) recovering to 63% of 2019 levels
  - **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%
  - **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**:
  - visits from the **UK accounted for 73% of visits (373,910)** recovering to three quarters of 2019 levels (76%)
  - visits from the **other Channel Islands[2] (33,430)** remain at 56% of 2019 levels
  - **visits from France (74,830)** almost doubled (+83%) on an annual basis but remain at 55% of 2019 levels
  - 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
  - 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:**
  - around half of adult visitors to Jersey (48%) were aged 55 or over
  - 13% of adult visitors were travelling with children under the age of 16
  - Two-fifths of leisure 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

Annual Travel Survey – 2023 4insight

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

- o 70% of inclusive package visits were booked through a travel agent or tour operator
- o For those making independent bookings, 88% booked their accommodation and 93% booked their travel online

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

- The **visit experience**:
  - o the **Net Promoter Score, (NPS)** for **leisure visitors** was 71 the same as the previous year
  - o 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
  - o 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

[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.*

1. Passenger departures

Table 1 shows the volume of **passengers** departing by air and sea on the main consolidated routes from Jersey (scheduled services). In addition, the number of passengers departing by private plane and sea vessels is also presented.

In 2023, the total number of passengers departing from Jersey's ports increased by 14% when compared to 2022 and recovered to 83% of the level recorded in 2019 (pre-pandemic). On an annual basis, the number of passengers travelling by scheduled sea routes has showed a stronger recovery, increasing by 28% since 2022. In comparison, the number of passengers travelling by scheduled air services increased by 10% across the same period. The largest annual increases have been observed for the number of passengers travelling to France (+54% since 2022) and the number travelling to foreign countries (+40%).

Whilst strong annual growth has been observed in the number of scheduled sea passengers, recovery compared to 2019 (79%) remains slower than for scheduled air passengers (85%). The number of passengers travelling on UK scheduled sea routes was almost a quarter higher than in 2019, whereas passenger numbers on Channel Islands routes were recorded at around 60% of pre-pandemic levels.

In 2023, 3 cruise ships brought 310 passengers ashore. The number of cruise ships was low due to the unseasonal inclement weather we experienced this summer, many visits were cancelled or rerouted to Guernsey as the weather was not suitable for them to anchor off Jersey and bring passengers ashore.

Table 1 – Breakdown of passenger departures, 2019 – 2023

	Volumes				
	2019	**2022**	**2023**	**% change 2019 to 2023**	**% change 2022 to 2023**
UK scheduled air	766,210	603,580	661,560	-13%	10%
Inter-island scheduled air	65,900	37,460	39,830	-39%	6%
Foreign scheduled air	26,770	20,550	28,920	8%	40%
Total scheduled air	**858,880**	**661,580**	**730,310**	**-15%**	**10%**
UK scheduled sea	52,780	68,070	64,810	23%	-5%
Inter-island scheduled sea	44,940	22,760	26,800	-40%	18%
French scheduled sea	202,140	93,530	143,880	-29%	54%
Total scheduled sea	**299,850**	**184,350**	**235,490**	**-21%**	**28%**
Private aircraft	12,570	11,340	10,160	-19%	-10%
Visiting yachtsmen	18,580	10,210	13,760	-26%	35%
Cruise passengers	3,630	2,030	310	-91%	-85%
Total departing passengers	**1,193,510**	**869,510**	**990,020**	**-17%**	**14%**

Figure 1 below shows the total number of departing passengers broken down by month in 2023 compared with 2019. The greatest monthly recovery was observed in October 2023 when the number of departing passengers recovered to 92% of 2019 levels. This was followed by the slowest monthly recovery observed in November 2023 when the number of departing passengers was at 79% of 2019 levels; travel was significantly impacted in November and December as the result of the damage to the island's infrastructure caused by storm Ciaran.

Figure 1: Total number of departing passengers broken down by month, 2019 and 2023
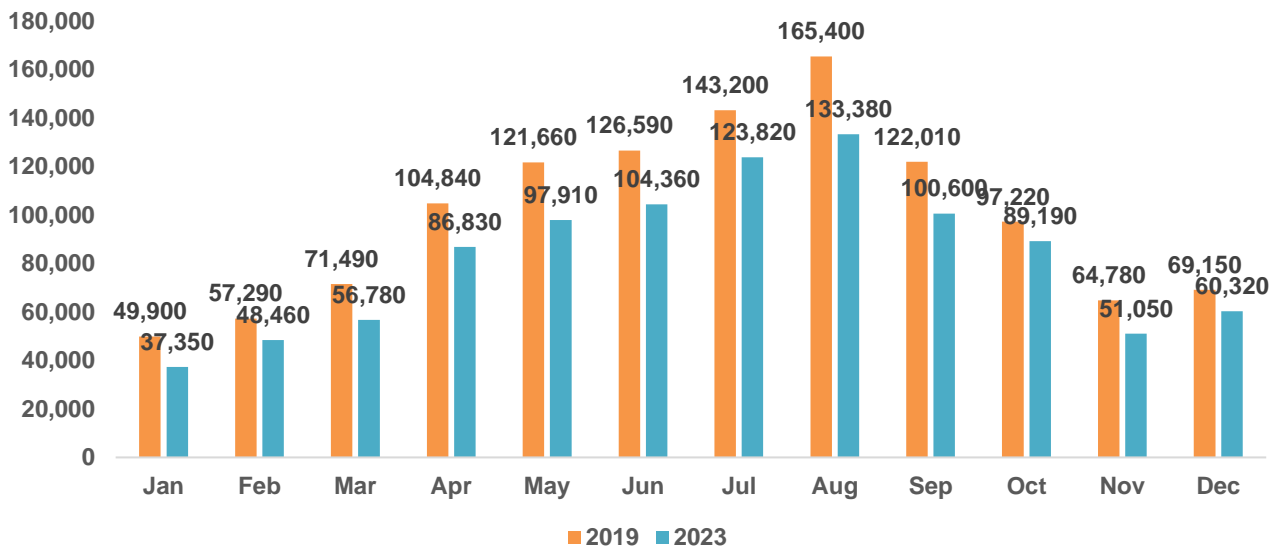

Passenger data forms the basis for calculating the volume of tourism visits, but also includes resident movements, departing seasonal or long-term workers, some transit passengers and also visitors who may be counted twice in departures as they take an off-island trip during their stay in Jersey. Differing routes have a varying profile of passengers depending upon schedules, the time of year and the availability of onward connections.

In 2023, 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%.

Figure 2 shows the proportion of departing passengers that were classified as visitors at the end of their trip in each month of 2023 (this includes leisure visits, business visits, visits to see friends and relatives and 'other' visits including travel for participating or spectating at sporting or cultural events and festivals, as well as educational trips). As can be seen in Figure 2 the proportion of departing passengers that were classified as visitors was greatest in the summer months, peaking in August when almost two-thirds (63%) of departing passengers were visitors to the Island. In December, less than a third (29%) of departing passengers were classed as visitors at the end of their trip.

In 2023, the number of other departing passengers (463,500) which reflects largely residents but also some seasonal and longer term workers as well as passengers in transit and a small number of returning visitors, exceeded the number recorded in 2019 (422,820) suggesting that island residents are travelling more frequently than before the Covid-19 pandemic.

Figure 2: Number of departing visitors as a proportion of all departing passengers, 2023
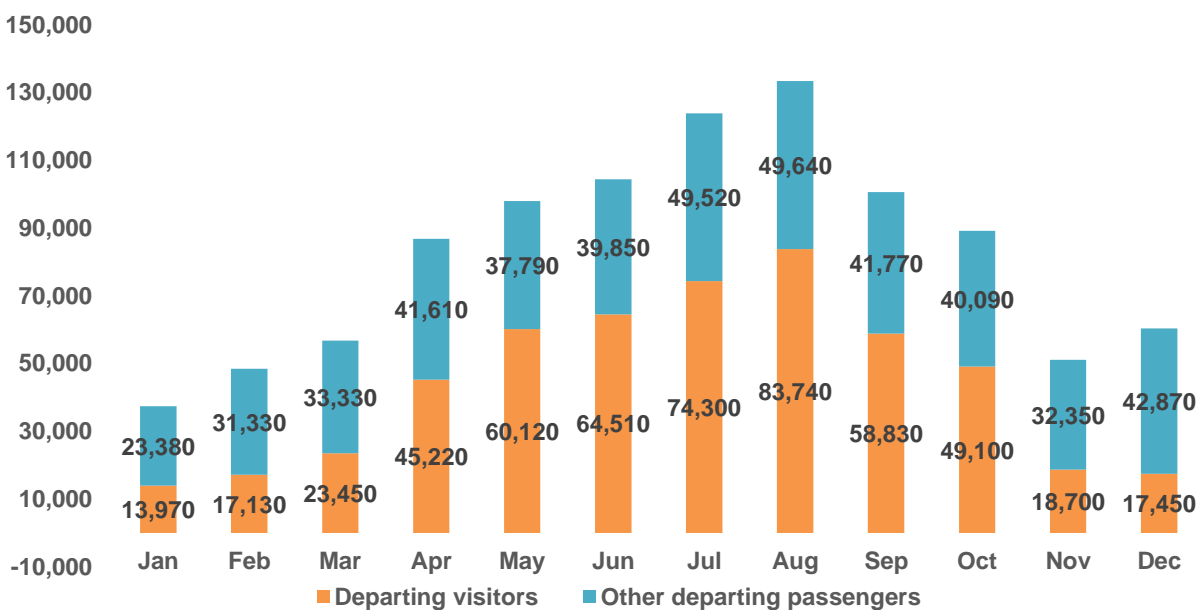
2. Departing visitors and length of stay

In 2023, the number of visits to Jersey increased by 11% compared to the previous year and recovered to 68% of 2019 levels.

The number of visitors travelling via scheduled sea services increased by more than a quarter (28%) compared to 2022 showing strong annual growth. In comparison, the number of visitors departing via scheduled air services increased more moderately by 6% on annual basis. When compared to 2019 however, the recovery of scheduled air visitors is stronger than that recorded for scheduled sea.

Across 2023, 71% of visitors departing from Jersey left on scheduled air routes. Of those departing by air, the large majority (91%) were travelling to a UK airport and a further 6% were departing to Guernsey. The remaining visitors were departing to foreign airports such as Madeira, Ibiza, the Netherlands, Germany or Ireland.

Table 2 – Breakdown of visits by mode of departure, 2019 - 2023

	Volumes				Volumes			Overall change 2019 to 2023 %	Overall change 2022 to 2023 %
	Q1 2023	Q2 2023	Q3 2023	Q4 2023	2019	2022	2023		
Scheduled air	46,750	116,020	151,710	61,920	534,640	355,360	376,390	-30%	6%
Scheduled ferry	6,780	47,400	55,090	21,870	208,360	102,370	131,130	-37%	28%
Private aircraft	900	1,510	1,580	950	5,480	5,520	4,930	-10%	-11%
Visiting yachtsmen	130	4,610	8,510	510	18,580	10,210	13,760	-26%	35%
Cruise passengers	0	310	0	0	3,630	2,030	310	-91%	-85%
Total visits	**54,550**	**169,840**	**216,870**	**85,260**	**770,690**	**475,480**	**526,520**	**-32%**	**11%**

Figure 3: Number of overnight visits (visits lasting at least one night) as a proportion of all visits to Jersey, 2017 to 2023
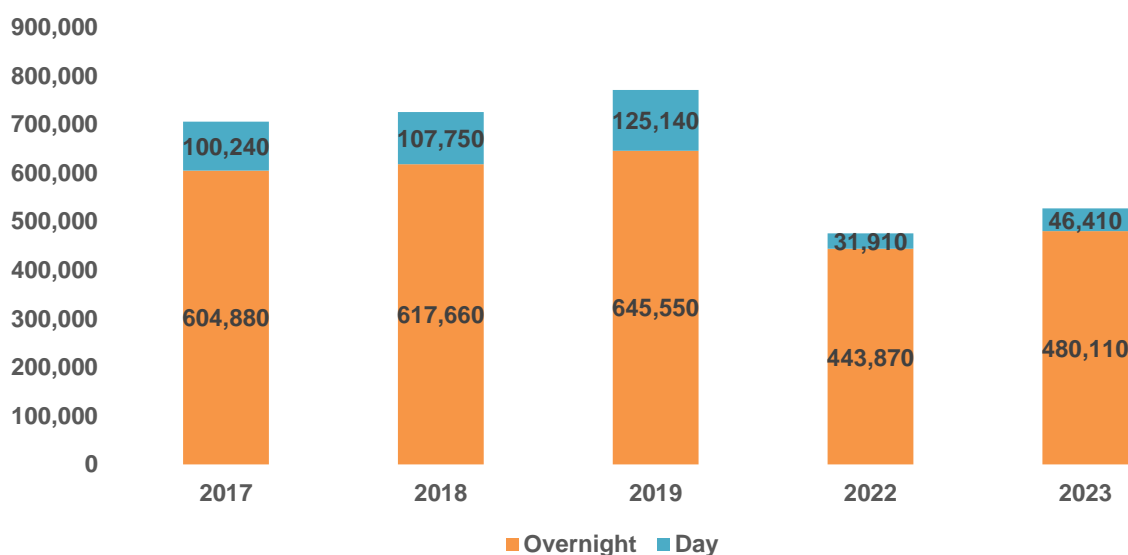
Whilst the number of day visits increased by almost a half (45%) compared to 2022, it continues to be significantly impacted following the Covid-19 pandemic and Brexit, recovering to 37% of the level seen in 2019. In previous years (2017 to 2019), around 1 in 6 visits (16%) to Jersey were day trips, compared to 9% in 2023. In previous years, a large proportion of the 'day trip' market travelled via French sea routes.

In April 2023, the French ID scheme launched, meaning French nationals could travel directly to Jersey on day trips using valid French national identity cards. This appears to have had an impact on the number of French day trippers in 2023, which was 31,440 an increase of 110% compared to in the year before.

The number of overnight visits (visits lasting at least one night) has showed a much stronger recovery when compared to 2019 (recovering to 74% of 2019 levels). On an annual basis, the number of overnight visits has increased by 8%.

When breaking the number of visits down by length of stay we can see that the day trip and shorter stay markets have not recovered as strongly as longer stays. In 2023, the number of visitors staying for 8 days or longer remains 3% higher than that recorded in 2019 (the same picture as that observed in 2022). The number of nights spent on island by longer stay visitors is a third (33%) higher than pre-pandemic levels.

On an annual basis, the number of day trip visitors has increased by around half and the 1-3 night stay market has increased by a fifth. The number of visitors coming to Jersey for longer stays (4-6 nights, 7 nights and 8+nights) has remained relatively unchanged since 2022.

## Figure 4 – Visits by length of stay, 2023
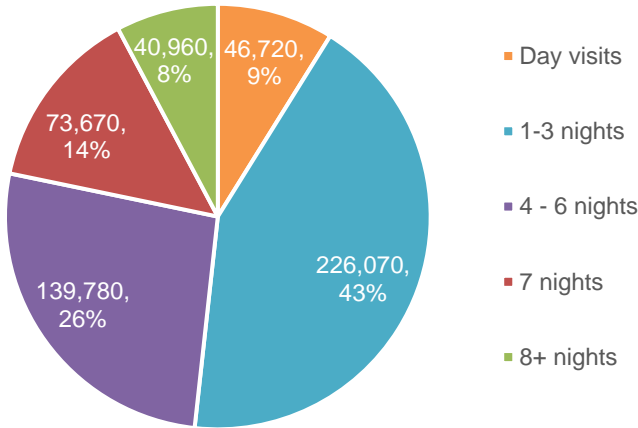
Compared to 2019:

- Day visits recovered to 37%

- Visits lasting 1 to 3 nights recovered to 72%

- Visits lasting 4 to 6 nights recovered to 74% of previous levels

- Visits lasting for 7 days recovered to 70% of previous levels

- The number of visits lasting for 8

The average length of stay (by visitors staying at least one night) in 2023 was 4.7 nights, reflecting a marginal fall compared to 2022 when it was 4.9. The average length of stay recorded in 2023 remains at around half a night longer on average than that recorded in 2019 (4.2). This longer average length of stay has resulted in a strong recovery in the overall number of nights spent by visitors in Jersey; in 2023 the total number of visitor nights was 2,268,330 reflecting an 83% recovery when compared to 2019. Figure 5 below shows the number of visitor nights spent in Jersey from 2017 to 2023.

Figure 5: The number of visitor nights spent in Jersey, 2017 to 2023
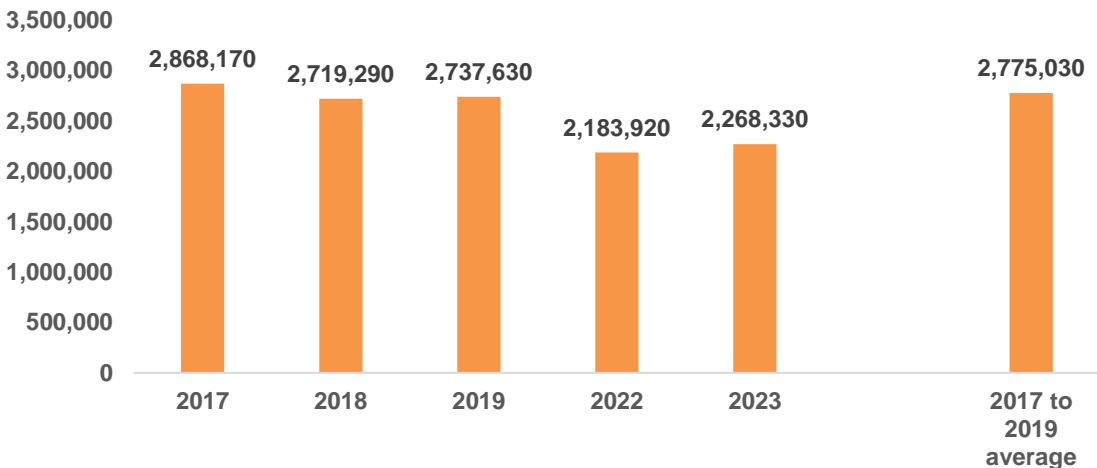
Purpose of visit

In 2017 to 2019, 67% of all visits to Jersey were made for leisure purposes. This compares to 61% of visits made for this purpose in 2023. In comparison, more than a fifth (22%) of all visits to Jersey were made to see friends and relatives in the latest year, reflecting a higher proportion than that seen in previous years (2017 to 2019) when the proportion has been closer to 15%. Around 1 in 10 visits (11%) were made for business purposes in 2023 reflecting a similar proportion to that seen in the previous year.

Figure 6 – Total visits by purpose of visit, 2023
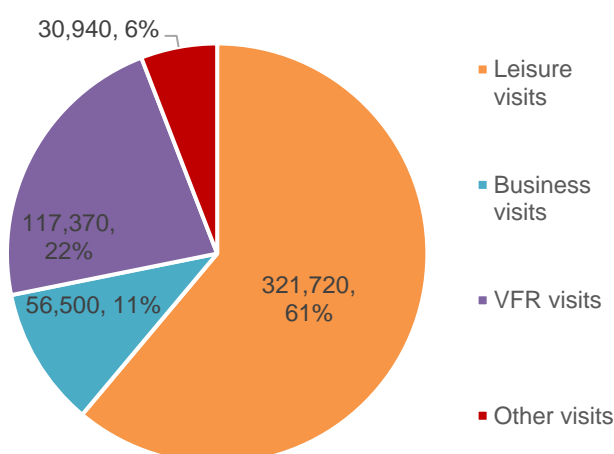
Compared to 2019

- Leisure visits recovered to 63% of the previous level

- Business visits recovered to 85%

- Visits to friends and relatives (VFR) surpassed 2019 levels by 4%

- Other visits recovered to 40%

NB: refer to the appendices for the equivalent figures for previous years. "Business" visits also include those attending a conference or seminar, trade fair or exhibition. Those visiting friends and family (VFR) do not necessarily stay with friends and family and also stay in commercial accommodation. "Other" purposes of visit also include participating or spectating at sporting or cultural events and festivals, as well as educational trips.

Table 3 – Volumes, broken down by visit purpose, 2019 – 2023

	Volumes					Volumes			Overall change 2019 to 2023, %	Overall change 2022 to 2023, %
	Q1 2023	Q2 2023	Q3 2023	Q4 2023		2019	2022	2023		
Leisure visits	17,520	110,800	148,590	44,800		514,620	284,020	321,720	-37%	13%
Business visits	13,700	15,190	14,030	13,590		66,110	54,040	56,500	-15%	5%
VFR visits	18,370	30,630	49,020	19,350		112,950	110,050	117,370	-3%	7%
Other visits	4,960	13,220	5,240	7,530		77,020	27,670	27,670	-60%	12%
Total visits	54,550	169,840	216,870	85,260		770,690	475,490	526,520	-32%	11%

Table 4 – Visitor nights and average length of stay (for those stay at least one night) broken down by visit purpose, 2017 – 2023

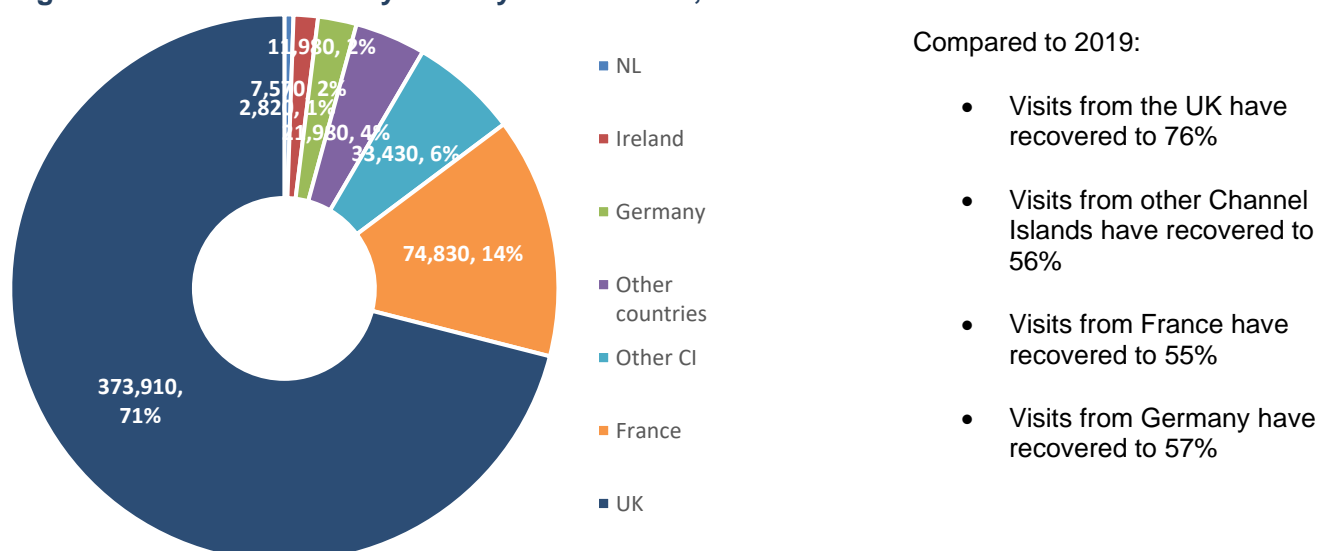|	2019		2022		2023		Change in visitor nights 2023/2019 %	Change in visitor nights 2023/202 %
	Total number of visitor nights	Average length of stay	Total number of visitor nights	Average length of stay	Total number of visitor nights	Average length of stay		
Leisure visits	1,918,290	4.4	1,329,690	5.0	1,332,420	4.6	-31%	0%
Business visits	138,810	2.8	151,100	3.2	167,850	3.3	21%	11%
VFR visits	544,650	4.9	627,900	5.8	674,210	5.8	24%	7%
Other visits	135,980	3.0	75,210	3.2	93,860	3.6	-31%	25%

As can be seen above in Tables 3 and 4, the number of leisure visits has increased by 13% in 2023 compared to 2022 but remains at 63% of 2019 levels. The average number of nights stayed by leisure visitors has decreased from 5.0 nights in 2022 to 4.6 nights in 2023 resulting in marginal annual change in visitor nights. The number of nights spent by leisure visitors remains at 69% of 2019 levels.

Whilst the number of business visits has not quite recovered to pre-pandemic levels (recovery to 85% of 2019 levels), the number of visitors nights for this market is more than a fifth higher than in 2019 due an increased average length of stay for this visitor type. On an annual basis, the number of business visits (+5%) and visitor nights (+11%) has increased.

Visitors coming to the island to see friends and relatives continue to stay for almost a whole night longer on average than in 2019. The number of VFR visits and the number of visitors nights have increased by 4% and 24% respectively when compared to 2019. On an annual basis both the number of VFR visits and visitor nights have increased by 7%.

3. Country of residence

Figure 7 – Tourism visits by country of residence, 2023

Compared to 2019:

- Visits from the UK have recovered to 76%

- Visits from other Channel Islands have recovered to 56%

- Visits from France have recovered to 55%

- Visits from Germany have recovered to 57%

In 2023, the number of visits and visitor nights from all market segments have increased on an annual basis excluding the German market. In the latest year, the number of visits from Germany fell by 25% compared to 2022 and the number of visitors nights fell by 9%.

The greatest annual growth has been observed for the French market; in 2023 the number of visits from France

almost doubled (+86%) in a year and the number of visitors nights increased by 30%.

`Table 5 – Volume of visitors broken down by country of residence 2019 – 2023

	Volumes				Volumes			Overall change, % 2023 to 2019	Overall change, % 2023 to 2022
	Q1 2023	Q2 2023	Q3 2023	Q4 2023	2019	2022	2023		
UK	42,270	114,250	157,750	59,640	493,990	359,290	373,910	-24%	4%
Guernsey and Other CI	5,430	11,500	9,360	7,140	59,740	28,820	33,430	-44%	16%
Ireland	250	2,490	3,860	970	8,250	7,430	7,570	-8%	2%
France	3,820	29,390	27,990	13,640	135,550	40,190	74,830	-45%	86%
Germany	160	3,830	7,370	610	20,950	15,970	11,980	-43%	-25%
Other countries	2,640	8,370	10,530	3,260	52,200	24,070	24,800	-52%	3%
Total visits	**54,550**	**169,840**	**216,870**	**85,260**	**770,690**	**475,780**	**526,520**	-32%	11%

Table 6 – Visitor nights and average length of stay (for those stay at least one night) broken down by county of residence, 2017 – 2023

	2019		2022		2023		Change in visitor nights % 2023/2019	Change in visitor nights % 2023/2022
	Total number of visitor nights	Average length of stay	Total number of visitor nights	Average length of stay	Total number of visitor nights	Average length of stay		
UK	2,146,870	4.4	1,731,160	5.1	1,764,000	4.9	-18%	2%
Other CI	94,490	2.3	60,730	2.7	74,680	2.8	-21%	23%
Ireland	45,900	5.6	42,800	5.8	43,070	5.6	-6%	1%
France	138,940	2.9	102,770	4.3	134,320	3.4	-3%	31%
Germany	95,750	5.8	75,920	6.4	69,120	6.6	-28%	-9%

The annual length of stay for UK visitors (who stayed for at least one night) fell marginally in the latest year from 5.1 in 2022 to 4.9 in 2023, resulting in the total number of visitors nights remaining largely unchanged (+2%).

Whilst the average length of stay for visitors from France (who stayed at least one night) fell by almost an entire night on an annual basis, the number of visitor nights increased by almost a third (31%). This is due to the significant increase seen in the number of French visitors in the latest year.

Tables 7 and 8 below show that a quarter (25%) of UK visitors travelling to Jersey on the scheduled air and sea routes were resident in the South East of England a further one in six (18%) were from the South West.

More than half (51%) of French visitors were from Bretagne. For the other key markets, the sample sizes for the visitors who provided an area code were not sufficient to provide a robust breakdown by region.

Table 7 – UK region of residence for visitors on scheduled air and sea routes, 2023

Area	Volume	% of UK visits
South East	102,860	28%
South West	58,800	16%
Greater London	57,520	15%
Scotland	35,000	9%
North West	26,070	7%
West Midlands	22,670	6%
East Midlands	19,840	5%
Yorkshire / Humberside	16,580	4%
Wales	15,590	4%
East of England	8,360	2%
North East	5,240	1%
Northern Ireland	3,120	1%
Isle of Man	2,270	1%
Total UK Visits	**373,910**	100%

Table 8 – French region of residence for visitors on scheduled air and sea routes, 2023

| Region	Volume	% of French visits
Bretagne	38,100	51%
Pays de la Loire	10,080	13%
Normandie	9,610	13%
Île-de-France	4,320	6%
Occitanie	3,130	4%
Nouvelle-Aquitaine	2,490	3%
Bourgogne-Franche-Comté	1,850	2%
Grand Est	1,330	2%
Centre-Val de Loire	1,180	2%
Auvergne-Rhône-Alpes	1,060	1%
Hauts-de-France	860	1%
Provence-Alpes-Côte d'Azur	830	1%
Total French visits	**74,830**	100%
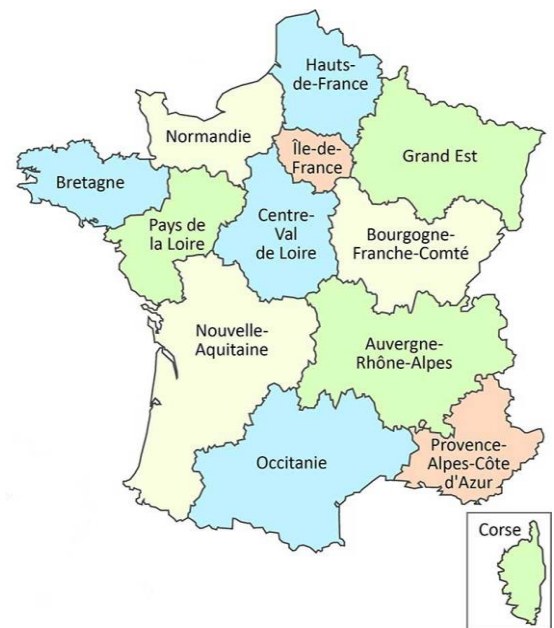
4. Visitor expenditure

In the Visitor Exit Survey visitors are asked to provide information about how much they spent on their visit to Jersey (travel to and from the island and accommodation) as well as any on-island expenditure, such as food and drink, retail, entertainment, etc. As expenditure is **self-reported**, some visitors may fail to remember everything they spent whilst visiting Jersey. Expenditure figures presented below are therefore likely to reflect conservative estimates.

Figure 8 below shows the estimated total on-island expenditure by visitors to Jersey in each year from 2017 to 2023. The total expenditure figures 2017 to 2023 presented in Figure 8 have been inflated to show the values in real terms (expenditure data reflated to December 2023 values and in nominal terms can be seen below in Tables 9 and 10).

Figure 8 – Annual tourism self-reported on-island expenditure in £million reflated, 2017 – 2023
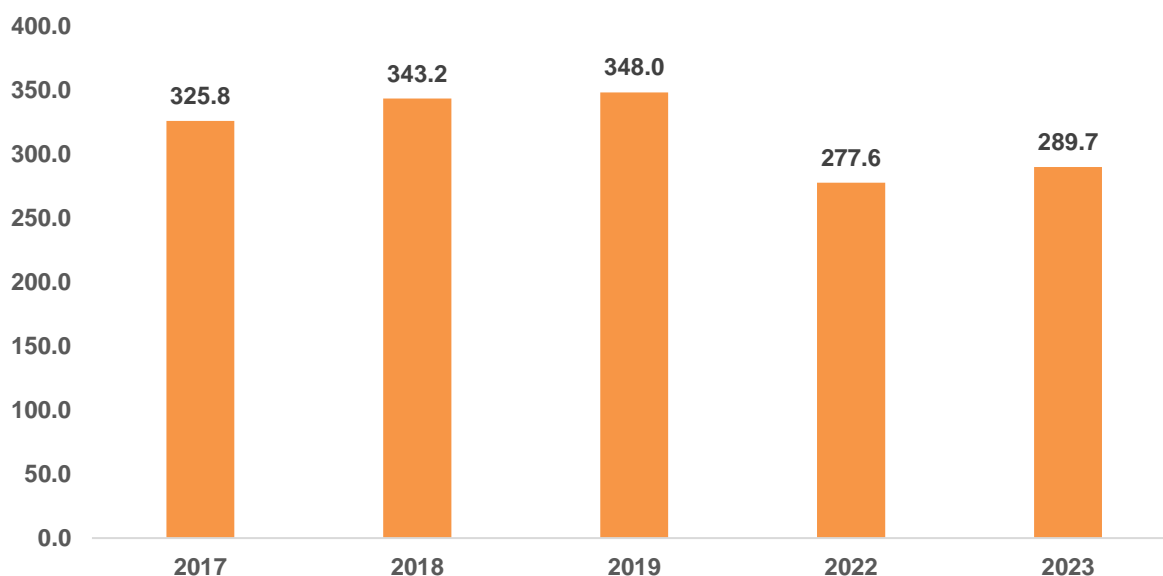
Total expenditure in 2023 (£289.7 million) recovered to 83% of 2019 levels when values are held constant for inflation and increased by 4% on an annual basis.

Table 9 – Annual tourism on-island expenditure reflated, 2017 – 2023

	Expenditure						
	2017	**2018**	**2019**	**2022**	**2023**	**Change 2019 to 2023 %**	**Change 2022 to 2023 %**
On-island spend per visit	£462	£473	£452	£583	**£550**	22%	-6%
On-island spend per visitor night	£114	£127	£127	£128	**£128**	1%	0%
Total on-island spend (£million)	£325.8	£343.2	£348.0	£277.6	**£289.7**	-17%	4%

Applying the December 2023 retail price index to previous years data shows that the average spend per visit has increased by 22% since 2019 but decreased marginally on an annual basis by 6%. Spend per visit is strongly correlated with average length of stay which has increased significantly since 2019 but fallen marginally in the latest year.
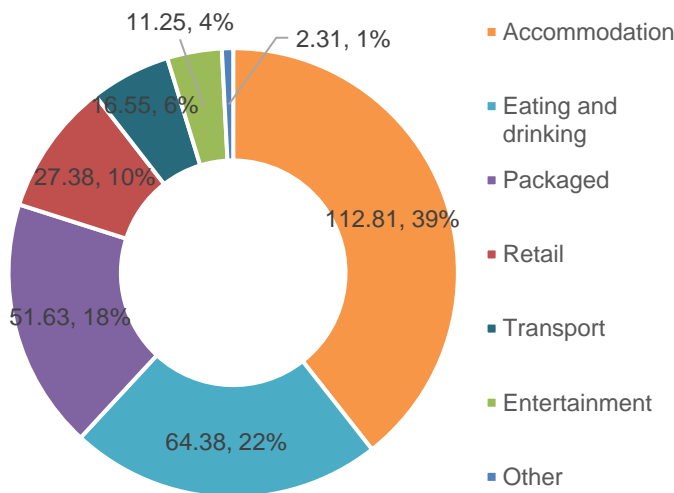
The average spend per visitor night has remained largely unchanged since 2019 when adjusting for inflation.

Table 10 – Annual tourism on-island expenditure <u>in nominal values</u>, 2017 – 2023

	Expenditure					Change 2019 to 2023 %	Change 2022 to 2023 %
	2017	**2018**	**2019**	**2022**	**2023**		
On-island spend per visit	£346	£370	£363	£526	**£550**	**52%**	**5%**
On-island spend per visitor night	£85	£99	£102	£115	**£128**	**25%**	**11%**
Total on-island spend (£million)	£243.9	£268.4	£279.8	£250.3	**289.7**	**4%**	**16%**

In nominal terms, total expenditure has surpassed 2019 levels by 4% and on-island spend per visit has increased by more than half (52%).

Figure 9– Breakdown of tourism on-island expenditure by category, (£million), 2023

- Accommodation
- Eating and drinking
- Packaged
- Retail
- Transport
- Entertainment
- Other

11.25, 4%   2.31, 1%
16.55, 6%
27.38, 10%
112.81, 39%
51.63, 18%
64.38, 22%

The majority of the cost paid for a packaged leisure (i.e. where a single price is paid to cover the travel, accommodation, and other visit elements) would likely be on accommodation, although packaged visits can also include transport, transfers, tours and other activities.

Accommodation accounts for around two-fifths of total on-island expenditure (39%) and eating and drinking accounts for around a quarter (22%).

This is an almost identical picture to that observed in 2022.

NB* - Packaged holidays include the price paid for accommodation and travel to and from the Island. The price paid for packaged holidays could also include other elements such as transport whilst on the island, food and drink in accommodation, travel insurance, etc.

Figure 10 – Breakdown of tourism on-island expenditure by country of residence (major markets only), (£million), 2023
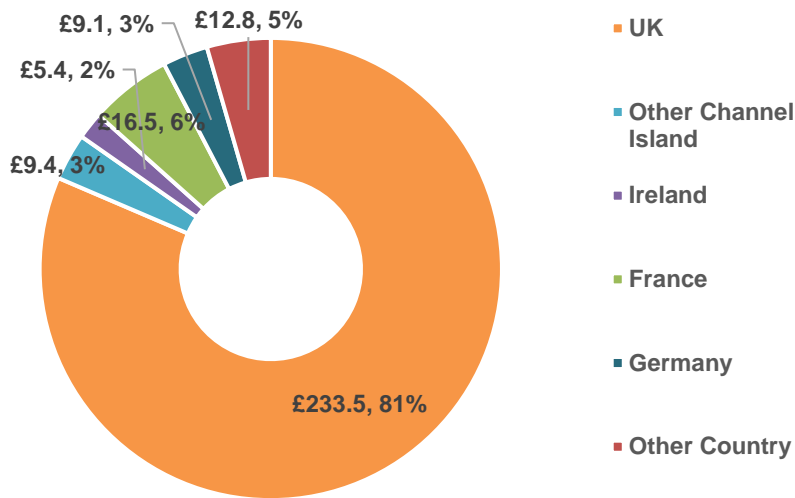
Four-fifths of tourism on-island expenditure is generated from UK visitors (81%).

The next biggest market in terms of overall spend is France, generating 6% of overall expenditure.

Spend per visitor night ranges from £144 for visitors from France to £71 for visitors from 'Other Countries'.

NB - Figure 10 shows the estimated expenditure breakdown for those visitors on the scheduled air and sea routes.

Travel cost

For those travelling independently i.e., where travel can be costed separately from an inclusive package, per person the average return fare paid to Jersey was £130. This is very similar to in the previous year. Fares were on average £25 more expensive in the summer months (July to September) compared to out of season (October to May).

Per person the average fare paid on sea crossings (£128) was similar to the average fare paid on air routes (£131). Sea crossings can often also include the price of transporting a vehicle.

Visitors paid £63 on average to travel to Jersey for a day trip compared £139 for travel on a visit lasting 1 night or more. Whilst the price for travel on a visit lasting 1 night or more has remained constant since 2022, the average price of travel for a day trip has fallen by almost £20.

Table 11 shows the average return fare paid by visitors to Jersey broken down country of residence and whether they travelled by air or sea.
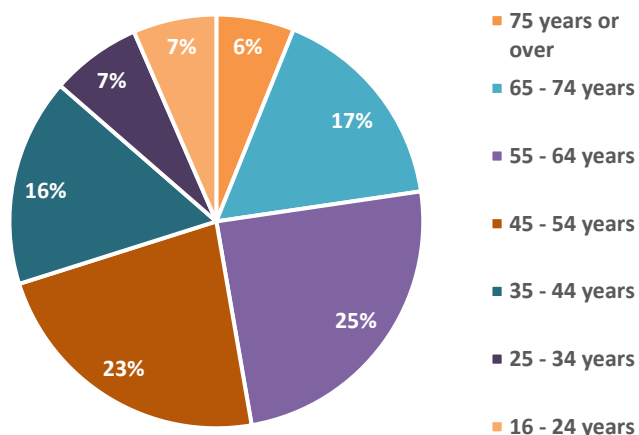
Table 11: Average return fare paid by visitors to Jersey broken down by country of residence (major markets only), 2023

	UK	Other CI	Ireland	France	Germany	Other Country
Scheduled air	125	133	146	175	257	207
Scheduled sea	198	82	108	72	114	136
Grand Total	**142**	**98**	**144**	**73**	**176**	**177**

The average return fare paid by visitors from Germany (£176) and other foreign countries (£177) was more than double the return fare paid by visitors from France (£72). It should be noted that a large proportion of French visitors (42%) travel to Jersey for a day trip and prices for day trip travel are significantly less than those paid for overnight visits.

5. Additional Visitor Profile

Figure 11 – Age profile of adult visitors (aged 16 or over), 2023

Legend:
- 75 years or over
- 65 - 74 years
- 55 - 64 years
- 45 - 54 years
- 35 - 44 years
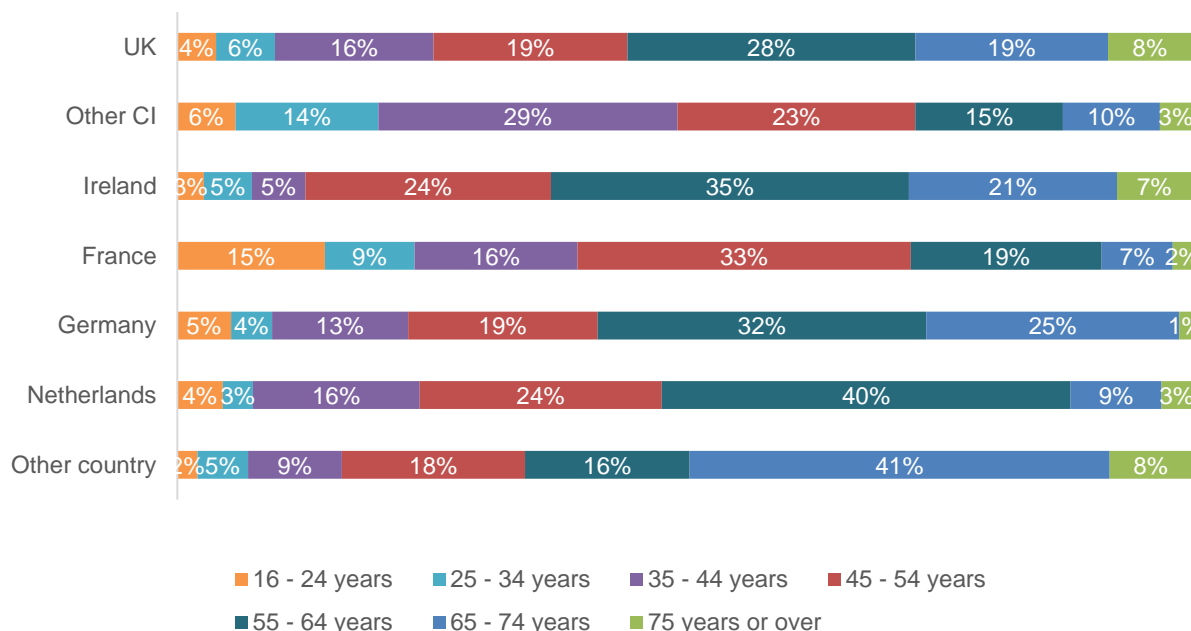- 25 - 34 years
- 16 - 24 years

As can be seen in Figure 11, around half (48%) of all adult visitors to Jersey were over the age of 55 in 2023.

The proportion of 16 to 24 years olds visiting the island was 7% in the latest year, exactly the same proportion seen in 2022.

NB - The percentages are only for visitors travelling on the scheduled air and sea routes

A younger age profile is more apparent for visitors from the other Channel Islands and France (see Figure 12 below); around half (49%) visitors from the other Channel Islands were under the age of 44 years in 2023.

Figure 12 – Age profile of adult visitors (aged 16 or over), broken down by country of residence (major markets only), 2023

Legend:
- 16 - 24 years
- 25 - 34 years
- 35 - 44 years
- 45 - 54 years
- 55 - 64 years
- 65 - 74 years
- 75 years or over

NB - The percentages are only for visitors travelling on the scheduled air and sea routes

Figure 13 below shows that an older age profile exists for leisure visitors compared to other visitor types. In 2023, 55% of leisure visitors were over the age of 55.

Figure 13 – Age profile of adult visitors (aged 16 or over), broken down by visit type, 2023
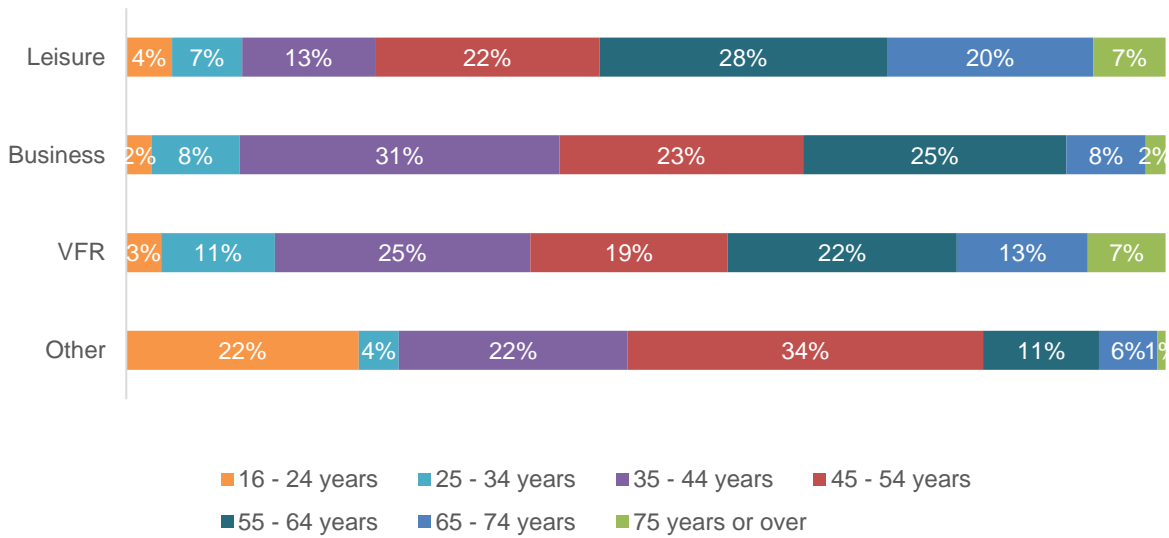
NB - The percentages are only for visitors travelling on the scheduled air and sea routes.

- In 2023, 13% of adult visitors were visiting Jersey with at least one child under the age of 16, a similar proportion to in 2022 (13%).

- Two-fifths (40%) of visitors were visiting for the first time. This is similar to in 2019 (41%) and 2022 (39%).

- Eight out of ten visitors (82%) from Germany were visiting for the first time compared to around half (56%) of French visitors, and 33% of visitors from the UK.

6. Booking methods for a visit to Jersey

The more detailed Visitor Exit Survey asks several questions about how bookings were made and what was included in the price. This information is used to make estimates for total on-island visitor expenditure and is also useful in better understanding the visitor market to Jersey.
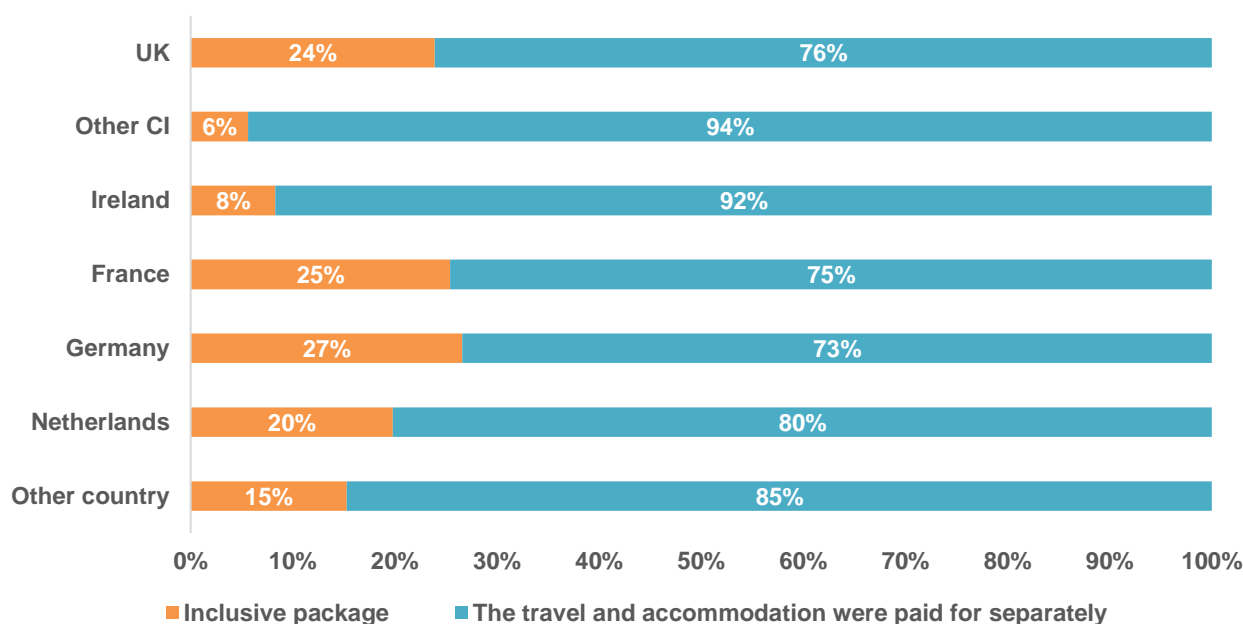
Inclusive package bookings

In 2023, more than a fifth (22%) of visitors to Jersey, who stayed at least one night (in commercial accommodation), booked an inclusive package. An identical proportion of inclusive package visitors was observed in the previous year.

Visitors were more than twice as likely to book an inclusive package when travelling by scheduled air services (25%) compared to sea (12%).

Inclusive packages were more popular with visitors from the UK, France and Germany; around a quarter of visitors from these countries paid for their visit as a package which included at least the travel and accommodation.

Figure 14 – Percentage of inclusive package visitors by visit type (major markets only), 2023

NB - The percentages are only for visitors travelling on the scheduled air and sea routes. "Inclusive package visits" are defined as a single price being paid for travel and accommodation together. Those on a day visit are excluded from the above.

60% of visitors who booked an inclusive package did so **online**. Inclusive package booking were made by the following means:

- 70% through a travel agent or tour operator
- 22% through an airline or ferry operator
- 6% through the accommodation in Jersey where they stayed

Independent bookings

Accommodation

In 2023, 77% of staying visitors (in commercial accommodation for at least one night) booked their travel and accommodation separately (commonly known as "independent" bookings).

Excluding those who stayed with friends or family in Jersey and those staying in free accommodation (e.g. provided by a company or staying in a second home or boat), 88% of independent bookings for accommodation were made **online** with bookings made by the following means:

- 50% direct with the accommodation provider
- 45% through an online booking site such as booking.com, hotels.com, Trivago. Expedia, AirBnB etc.
- 3% through a travel agent or tour operator (in a retail shop or over the telephone)

This profile of how visitors book their accommodation is almost identical to in the previous year.

Travel

For those booking their travel independently, including those on a day visit, 93% made the booking for their travel to Jersey online. Travel bookings were made by the following means:

- 85% direct with the airline or ferry operator
- 11% through an online travel booking site such as booking.com, Expedia, Agoda, Skyscanner etc.
- 2% through a travel agent or tour operator (in a retail shop or over the telephone)

The proportion of visitors booking their travel independently through an online travel booking such as booking.com or Expedia increased in the latest year (from 7%).

7. The visitor experience

The following section is about the visitor experience in Jersey, firstly showing the type of accommodation stayed in and the activities undertaken by visitors whilst here. In the Visitor Exit Survey, departing passengers are also asked whether they would like to visit Jersey again in the future and how they would rate different aspects of their experience; findings are presented below.

Figure 15 – Type of accommodation stayed in, 2023
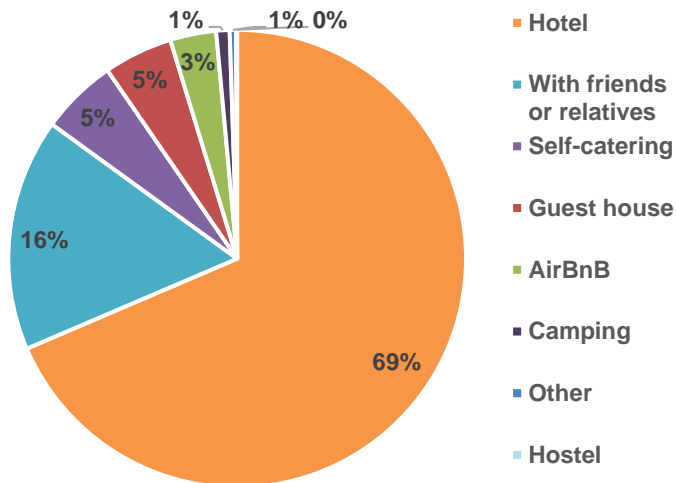
In 2023, more than two-thirds of visitors who stayed at least one night chose to stay in a hotel.

16% of visitors stayed with friends and relatives in the latest year.

The percentage of visitors who chose to stay with friends and relatives has decreased since 2022 when it was almost a quarter (23%).

NB - Figure 15 only shows the accommodation used for those on the scheduled air and sea routes.

The average cost per person per night for accommodation can be seen below in Table 12.

Table 12: Average cost of accommodation per person per night broken down by accommodation type, 2023

Accommodation type	Average cost per person per night (GDP)
Hotel	£100
Self-catering	£89
Guesthouse	£55
Other	£79
All	**£96**

The average cost of accommodation **per visitor per night** was highest for hotels at £100 per night on average.

The average cost of accommodation (all types) has risen from £83 per night in 2022 to £96 in the latest year.

Hotels and self-catering accommodation were the most highly rated by visitors at 4.7 out of a possible 5.

Figure 16 – Proportion of visits spent in commercial accommodation, 2017 to 2023
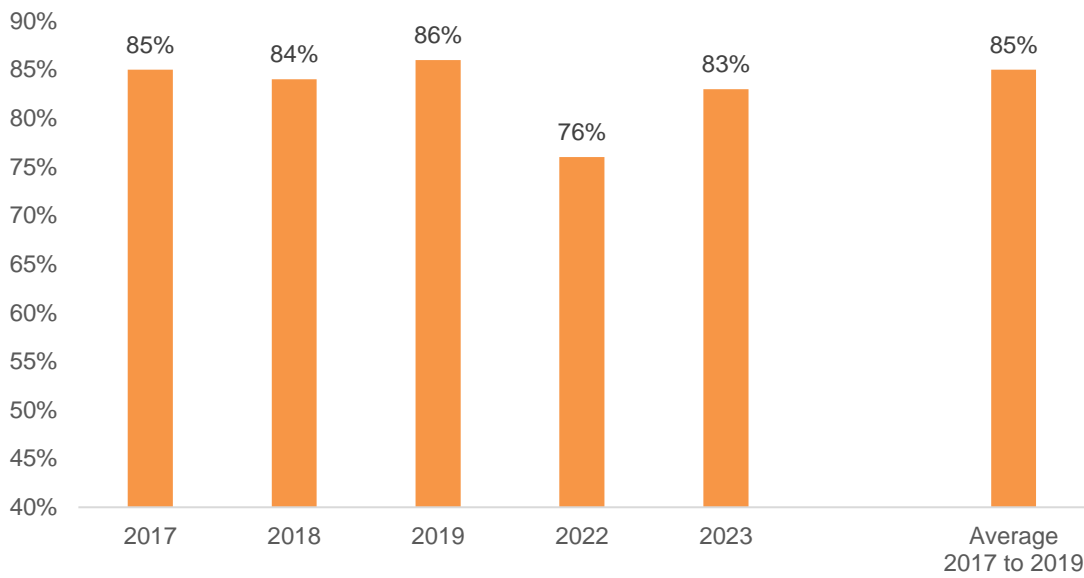
NB - Figure 16 only shows percentages for those visitors on the scheduled air and sea routes. In 2022, the estimated proportion of visitors staying in commercial accommodation is based on survey data collected in Q2 to Q4.

In 2023, the proportion of visitors staying in commercial accommodation (83%) returned to a level similar to that recorded before the pandemic (2017 to 2019). In 2022, the proportion was considerably lower at around three-quarters of visitors staying in paid accommodation due to the increased proportion of visitors who chose to stay with friends and relatives.

Figure 17 – Activities participated in during the visit, 2023

Activity	Percentage
Shopping for non-essential items	71%
Self-guided walk	65%
Used public bus service	57%
Paid visitor attraction	51%
Free visitor attraction	43%
Guided bus or coach tour	14%
Hired a car including Evie	10%
Self-guided cycle	6%
Cultural event	6%
Watched a sporting event	4%
Guided walk	2%
Sea-based activities	1%
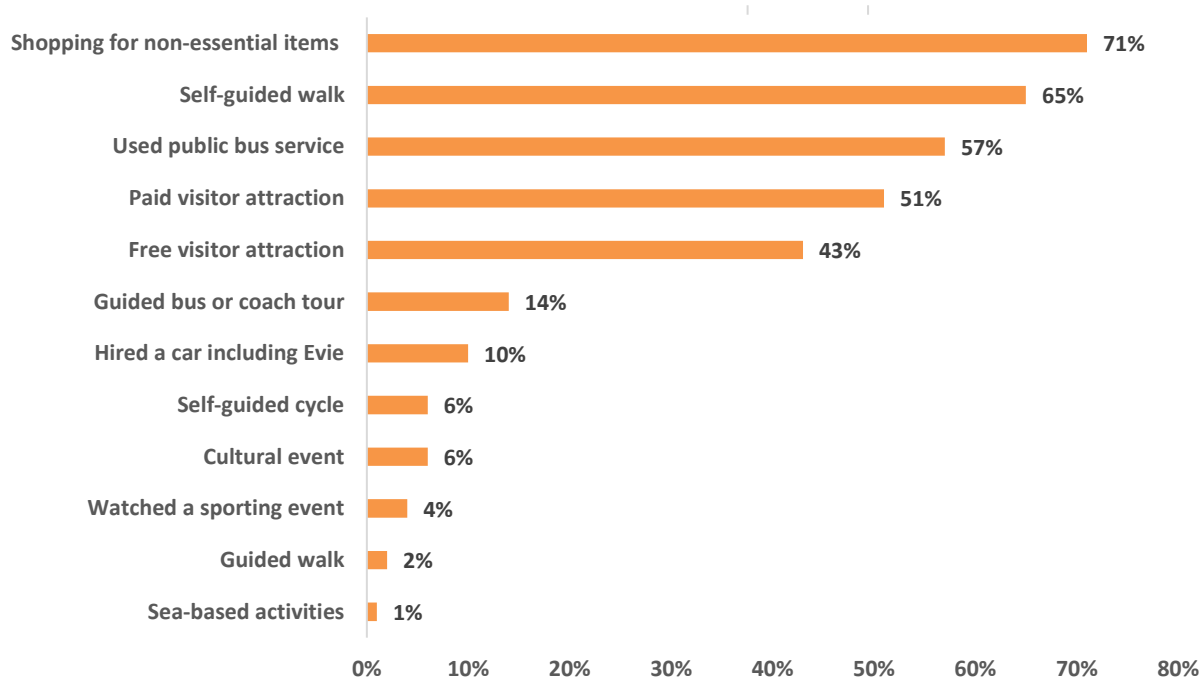
*NB - The percentages are only for visitors travelling on the scheduled air and sea routes. It includes those on a day visit as well as those staying for at least a night.

In 2023, the most popular activities with visitors continued to be shopping for for non-essential items and taking a self-guided walk. A significantly reduced proportion of visitors took part in sea-based activities in the latest year which is likely to be the result of bad weather of the summer season in 2023.

**Table 8 – Average rating scores for island attributes, 2017 to 2023**

	2017	2018	2019	2022	2023
Safety & security	4.7	4.7	4.7	4.8	4.8
Beaches	4.7	4.7	4.8	4.8	4.7
Countryside				4.7	4.6
Cleanliness	4.7	4.6	4.7	4.8	4.7
Jersey in general	4.5	4.5	4.5	4.7	4.6
Accommodation		4.4	4.4	4.6	4.6
Attractions	4.4	4.3	4.3	4.5	4.4
Restaurants, cafés & bars	4.4	4.3	4.3	4.5	4.5
Shops / retail	4.0	4.0	4.0	4.2	4.1
Value for money	3.8	3.8	3.9	3.8	3.7

NB - Average scores are based upon a rating scale from 5 for "Very good" down to 1 for "Very poor". The rating for beaches and countryside were combined in one question prior to 2022. The category of accommodation was added in 2018

Whilst ratings given by visitors for Jersey on all attributes remain very positive in 2023 they were marginally down in general compared to 2022. Visitors gave Jersey's value for money an average score of 3.7 out of 5.0, the lowest rating provided on this aspect since at least 2017.

8. Likelihood to revisit and to recommend Jersey

Figure 18 – Likelihood to revisit Jersey, 2023
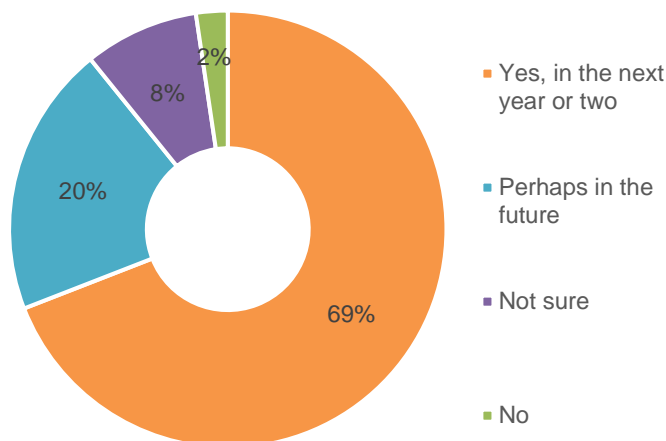
Over two-thirds (69%) of visitors said they would like to revisit Jersey within the next year or two and a fifth (20%) said perhaps in the future.

The likelihood of wishing to revisit in the next year or two differed by country of residence. 93% of visitors from the other Channel Islands said they would be likely to return to the island in the next year or two. More than two-thirds of visitors from the UK, Ireland and France also said they would like to visit again imminently. This compares to less than half of visitors from Germany, the Netherlands and other countries.

NB - Figure 18 The percentages are only for visitors travelling on the scheduled air and sea routes.

Net Promoter Score

The Visitor Exit Survey also asks, on a scale of 0 to 10, how likely respondents are to recommend visiting Jersey to a friend or relative. People who give a rating of 0 to 6 are classified as detractors as they are likely to provide a negative review of the island to friends and relatives. People who provide a score of 7 to 8 are thought to be passive in their view and people who provide a rating of 9 or 10 are classified as promotors i.e., they are likely to give a positive recommendation of Jersey to friends and relatives.

Based on responses to this question, the net promotor score is calculated by subtracting the percentage of those giving a score of 0-6 ("detractors") from those giving a score of 9 or 10 ("promotors").

The possible score ranges between -100 and +100. Generally speaking, a score of above 0 is good, above 20 is favourable, above 50 is excellent, and above 80 is world class.

In 2023 the Net Promotor Score for leisure visitors was 71, reflecting a significantly higher score than that recorded in 2019 and the same as 2022,

The Net Promotor Score for leisure visitors differed by country of residence with the highest NPS being provided by UK (78) leisure visitors. This compares to a NPS of 59 for leisure visitors from France and 69 for leisure visitors from Germany.

Figure 19: Annual Net Promotor Score for leisure visitors and proportion of Detractors, Passives and Promotors, 2017 to 2023
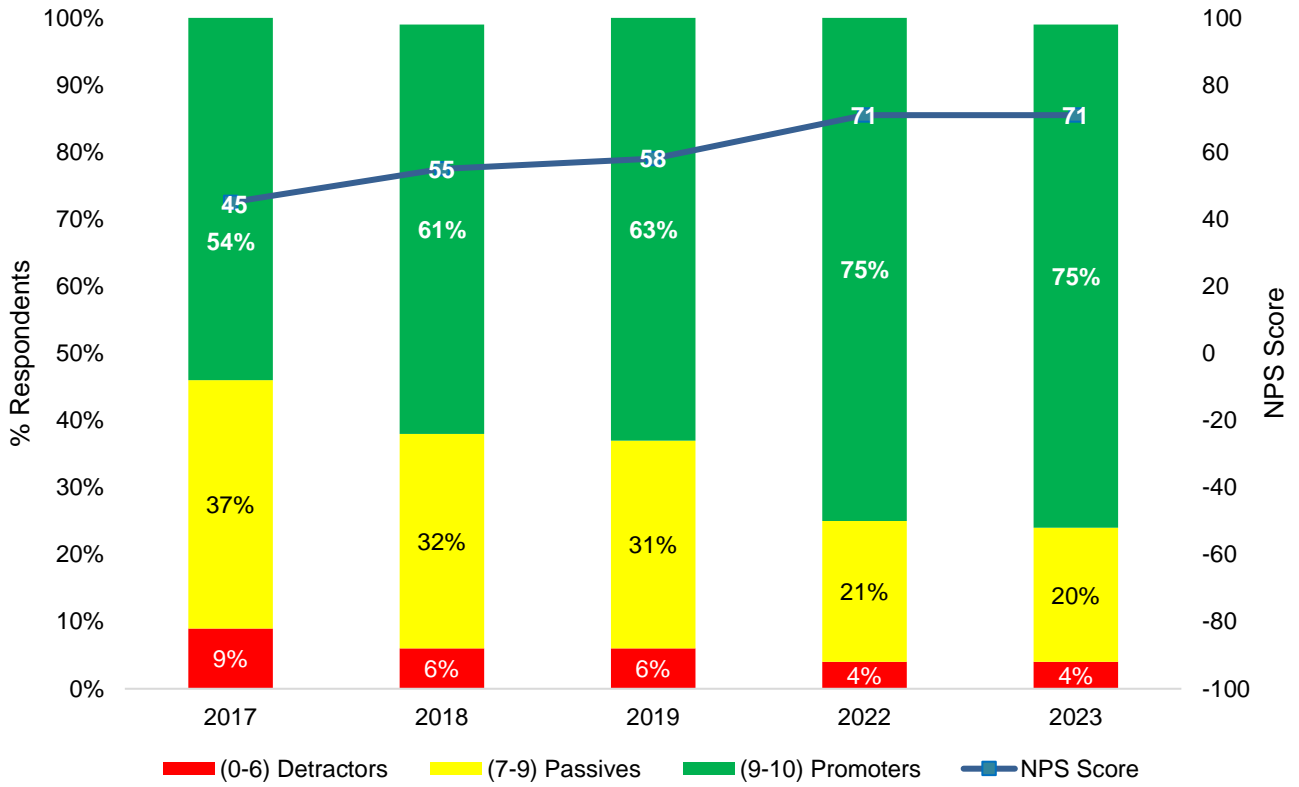
Appendix I: Methodology

Background

Prior to 2016, Jersey used alternative ongoing data sources, including a compulsory visitor registration scheme, to estimate the volume and value of tourism to Jersey. Periodic exit surveys were also undertaken to check and recalibrate the estimates and ongoing methodology. From July 2016, Visit Jersey implemented a continuous Visitor Exit survey with a new methodology and definitions to align Jersey's figures more closely with established tourism statistics produced by other countries. The fieldwork was outsourced, with the analyses and reporting being undertaken in-house.

In 2020, Statistics Jersey were contracted to undertake both the exit survey fieldwork and the analyses and reporting. However, in March 2020, survey fieldwork ceased to be implemented 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 and figures showed that the Covid-19 pandemic significantly impacted travel to and from the island throughout 2020, 2021 and early 2022.

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 due to difficulties attaining airport airside passes for the interviewers). For the rest of 2022, Jersey Covid-19 restrictions eased, and it was possible to achieve adequate survey sample sizes on all major routes.

Since the fieldwork commenced again in 2022, efforts have been made to expand on the use of digital tools, improving efficiencies for field researchers and reducing burden on visitors when providing data. Interviewers now collect information from departing visitors using online survey tools accessed via iPads, facilitating the data collection process and reducing the need for burdensome data cleansing processes. Visitors can also opt to complete the Visitor Exit Survey in their own time, using a barcode to access the survey online. Similarly, both the Calibration Survey and Visitor Exit Survey are now sent digitally to all visitors departing via Condor Ferries, enabling departing ferry passengers to complete the survey online at a time that suits them, supplementing existing interviewer led methods of data collection.

The questionnaires have largely remained consistent however modifications to question wording and field worker methodology may impact on the direct comparability of figures over time.

Data sources

1. Passenger Calibration Survey

A detailed breakdown of passenger volumes by route of departure is provided by the Ports of Jersey (as well as Condor Ferries for their own sea routes) on a monthly basis. However, these overall passenger figures include resident movements, departing visitors, as well as some transit passengers, longer-term or seasonal workers and 'returning visitors' i.e. those who travel off-island during their stay in Jersey and are therefore counted twice within the passenger data.

In order to break down (or calibrate) Jersey's passenger departure figures and establish the proportion of tourism visits from overall passengers, a comprehensive exit survey is undertaken with a representative sample of passengers as they depart through Jersey's passenger terminals at the airport and harbour. Interview shifts are planned to reflect passenger throughput and to cover all routes, all days of the week and all times of the day. It is particularly important in planning interview schedules that bias is not introduced by over-sampling morning or evening departures, or specific days of the week.

Within each shift, interviewers are instructed to adopt a randomised approach to interviewee selection so that any departing passenger, whether a resident or a visitor, has an equal likelihood to participate. At the airport and within the ferry terminal, all exit interviews are conducted face-to-face using electronic tablets for data collection, allowing for random selection of departing passengers, an essential component of the research methodology.

In May 2022, Condor introduced 'speedy boarding' which made it difficult for interviewers to conduct face to face interviews, especially with passengers travelling by car on sea routes. To compensate, Condor Ferries began emailing out a Passenger Calibration Survey to all passengers departing from Jersey on their ferries. Data collected online through this survey mode is compiled and analysed with data collected through face-to-face interviews and other data collected online. It should be noted that digital self-complete surveys from ferry passengers form only a small component of the final dataset and their contribution is monitored regularly to ensure that non-response bias does not diminish the robustness of statistics.

The Passenger Calibration questionnaire is short in length and contains questions on the outward and onward route, number of persons travelling within the party, whether they are a resident or visitor to Jersey, purpose of visit, country and region of residence, and length of stay. Interviewers with relevant language skills are allocated as far as possible to appropriate shifts and the questionnaires are also translated into French, German, Polish and Portuguese. This is especially true at the harbour where most of the interviewers are either French or fluent in French.

Profile data from the Passenger Calibration Survey data such as the percentage of departing visitors is weighted by passenger volume figures provide by the Ports of Jersey and Condor Ferries to form the basis of the monthly reports on the number of visits and overnight stays in Jersey. Where sample sizes on individual routes for an individual month are considered to be insufficiently robust, particularly when broken down further for departing visitors only, percentage breakdowns on these routes are imputed using a larger sample size collated on that particular route over a longer time period, provided that the time period can be considered to be broadly similar in terms of passenger profile.

Survey outputs

The primary aim of the Passenger Calibration survey is to determine the breakdown of passengers on each route in order to determine the overall number of visits to Jersey by purpose of visit, country of residence and length of stay. Some additional profiling questions are asked of visitors.

Total Departing Passengers

Departing Visitors	**Departing Residents**	**Returning Visitors***
Route of departure Onward travel Purpose of visit Country of residence Region of residence Party size and composition Length of stay Postcode / Area	Route of departure Onward travel Party size and composition	Transit passengers Longer-term workers
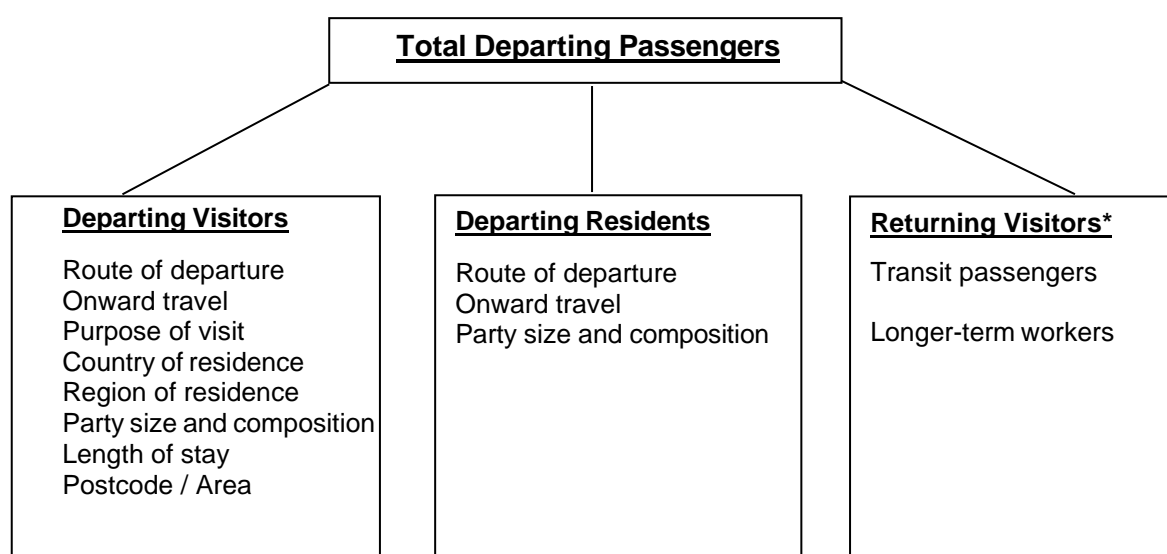
Returning visitors are those who may be counted twice in passenger numbers because they visit elsewhere during their stay in Jersey (e.g. visitor day trips to Sark, Herm or Guernsey).

2. Visitor Exit Survey

The monthly reports showing the breakdown of passengers and tourism visits to Jersey are based upon results from the Passenger Calibration Survey as detailed above. In addition to this and running 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.

Whilst the Calibration Survey shifts are planned to be randomly representative of all departing passengers, the Visitor Exit Survey shifts are scheduled to more accurately reflect the movements of departing visitors only and can be upweighted in order to achieve adequate sample sizes of specific visit types (e.g. by purpose of visit or country of residence).

Within each interview shift, fieldworkers are again instructed to adopt a randomised approach to interviewee selection but need to establish whether the respondent is a visitor departing from Jersey at the end of their stay before continuing to complete the questionnaire. As with the Calibration Survey, face-to-face interviews are conducted inside the passenger terminals, with cards with the survey QR code on or self-completion questionnaires in various languages being distributed to passengers in non-resident vehicles in the car-holding area at Elizabeth ferry terminal. Interviewers with relevant language skills are allocated as far as possible to appropriate shifts and the questionnaires are also translated into French, German, Polish and Portuguese. This is especially true at

the harbour where most of the interviewers are either French or fluent in French.

As part of the self-complete survey emailed out by Condor to all departing passengers, those identified as visitors to the island are asked to complete the more comprehensive set online in either English or French.

The primary purpose of the visitor survey is to establish visitor expenditure in Jersey, but the questionnaire also provides the following additional data:

- a more detailed profile of visitors, such as age and previous visit experience
- type of accommodation stayed in
- booking method (inclusive/package tour or independent)
- where booking was made (online, travel agent etc.)
- activities undertaken during their visit
- ratings for various aspects of their stay in Jersey
- likelihood to visit Jersey again in the future
- likelihood to recommend Jersey (Net Promoter Score)
- which segment visitors fall within

Weighting

Data from the Visitor Exit Survey is weighted by visitor data (volume of visitors and number of bed nights) established through the Passenger Calibration Survey and is reported on a quarterly basis e.g., on-island spend data from the survey sample is 'grossed up' to reflect the estimated spend for all visitors to Jersey within a specific quarter.

In 2022, the weighting methodology was modified. Previous to 2022, Visitor Exit Survey sample data was weighted by visitor volumes and bed nights for each individual route established through the Passenger Calibration Survey. This sometimes resulted in particularly large weights being applied for smaller routes that had been underrepresented in the Visitor Exit Survey. From 2022 onwards, weights are established and applied to broader route groupings:

- UK scheduled air

- Inter-island scheduled air

- Foreign scheduled air

- UK scheduled sea

- Inter-island scheduled sea

- France scheduled sea

Currently the sample data from the Visitor Exit Survey is not weighted to compensate for non-response bias however the need to introduce non-response weights continue to be evaluated. Future non-response weights may be added based on 'country of residence' or 'purpose of visit' for example.

3. **Private aircraft, visiting yachts and cruise passengers**

Monthly data on the number of passengers departing from Jersey on private aircraft by destination airport is provided by the Ports of Jersey. Consistent with the methodology established by Visit Jersey, sensible percentages are applied to each route to estimate the proportion of passengers that are departing visitors. In the absence of any further information or sampling data, an average length of stay of 1 night is applied and all are assumed to have stayed in Jersey for business purposes. The country of residence for these visitors is determined by the route the aircraft is recorded as flying to.

The marine leisure section within Ports of Jersey provides a monthly breakdown of visiting vessels that have paid to stay overnight in the marinas. The nationality and length of stay is also provided on a monthly basis and an online survey is conducted during the main summer months by Visit Jersey to determine the expenditure of visiting yachtsmen in Jersey. Within the monthly summary reports, all visiting yachtsmen are classified as staying leisure visits.

Ports of Jersey also provides monthly data on the number of cruise passengers visiting Jersey. Within the monthly reports, these are classified as leisure day visits.

Statistical reliability

Sample surveys are always subject to statistical error and the larger the sample size, the lower the statistical

variation.

The Passenger Calibration Survey for January 2023 to December 2023 is based upon 70,980 completed surveys representing 143,900 departing passengers.

In 2023, the Passenger Calibration Survey collected data from 36,040 departing visitors reaching the end of stay, reflecting 76,340 visitors.

Subject to the note above, the overall figures for the proportion of departing visitors on the scheduled air and sea routes should be considered as an estimate with a 95% confidence interval of approximately ±0.24%.

For statistics regarding departing visitors only e.g.., the proportion of departing visitors by country of residence, (based upon a coverage of 76,340 visitors), the figures should be considered as estimates with a 95% confidence interval of approximately ±0.33%.

The more detailed Visitor Exit Survey (which asks questions about on-Island spend etc.) is based upon 5,630 surveys representing 14,710 departing visitors. The Visitor Exit Survey data is weighted by visitor numbers calculated from the Passenger Calibration Survey.

It should be noted that when breaking down the results by individual routes or by country of residence for example, the sample sizes become much smaller with a resultant increase in the statistical error. The sampling methodology requires that interview shifts are planned to be representative overall of departing passengers. However, it is possible to either over-sample or under-sample certain smaller groups who may just depart on a single or several flights or sailings in a month. This is particularly relevant in the winter months when overall volumes of passengers are smaller, with a correspondingly smaller sample of passengers. This should be considered when interpreting the estimates for some of the smaller sub-samples of visitors.

Response coverage

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.

Appendix II – data tables

Table A1: 2017 to 2023

Yearly												
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%