Statistics
Jersey

Statistics Jersey: www.gov.je/statistics

Summary

In January 2020:

- there was a total of 50,880 **departing passengers**[1] from Jersey which was 2.0% higher than in January 2019 and also higher than in each of the two previous years

- compared to January 2019, total **tourism visits**[2] decreased by 6.4% to 23,530, but was above the 3-year average of 21,860 for the month of January

- due to an increase in **average stay** from 3.9 nights to 4.3 nights for those visitors staying for at least one night, the total number of **overnight stays** increased by 3.0% to 87,090 nights, which was also higher than in both 2017 and 2018

- breaking the visitor numbers down by main **purpose of visit**:
  - **holiday** visits decreased by 8.6% to 6,420, but remained higher than the previous 3-year average of 5,600
  - **business** visits increased by 10.5% to 8,550; the same level as in January 2018
  - **visits to friends and family** increased by 4.9% to 7,470 which was also higher than in January 2017 and 2018
  - **visits for other purposes**[3] decreased by 66.4% to 1,090

- breaking the visitor numbers down by **country of residence**:
  - visits from the **UK** decreased by 4.5% to 17,990, but remained higher than the 3-year average of 16,900
  - visits from the **other Channel Islands** decreased by 34.3% to 3,300, but were higher than in each of the two previous years of 2017 and 2018
  - visits from other smaller markets increased by 28.9% to 2,870, mainly driven by an increase in the number of visits from France

- breaking the visitor numbers down by **travel method**:
  - visits on the **scheduled air** routes decreased by 10.2% to 20,870, but were higher than the 3-year average of 19,750
  - visits on the **scheduled ferry** services increased by 49.4% to 2,290, and were also higher than the 3-year average of 1,880

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[1] Departing passengers include residents travelling off-Island, visitors leaving at the end of their visit, visitors who are already in Jersey but who go on a day or longer trip off-Island during their stay, as well as some transit passengers on certain routes.

[2] Tourism visits include any non-resident visitors to Jersey who may have stayed in Jersey for up to a year. Those visiting for leisure, business, study, sport or visiting friends or family are all classified as tourism visits, but seasonal or longer-term workers are excluded.

[3] "Other" purposes of visit also include participating or spectating at sporting or cultural events and festivals, as well as educational trips.

Passenger departures

Table 1 shows the volumes of departing passengers by air and sea on the main consolidated routes from Jersey. In order to determine the overall breakdown of visitors to Jersey, passenger departure figures on each individual route are used to weight the Passenger Exit Survey sample data.

Over the winter months, over 90% of passengers depart through the airport terminal, with nearly 90% of these passengers travelling initially to a UK airport. Other routes with significant volumes of passengers are to Guernsey by air and to St. Malo by sea. The table below shows the main increase has been in UK scheduled air passenger departures; up by 3.9% compared to January 2019.

Three-fifths (62%) of UK air passengers departed to Gatwick, which also saw the largest increase in volume; up by 1,740 passengers (7.5%). The Manchester route also more than doubled in passenger departures, while the Liverpool route showed the largest decrease.

### Table 1 – Breakdown of passenger departures, January 2019 - 2020

	Volumes		
	January 2019	January 2020	Overall change, %
UK scheduled air	38,830	40,330	3.9
Inter-Island scheduled air	5,690	5,410	-5.0
Foreign scheduled air	880	800	-9.2
Total scheduled air	**45,400**	**46,530**	**2.5**
UK scheduled sea	1,000	950	-5.1
Inter-Island scheduled sea	510	440	-13.9
French scheduled sea	2,220	2,280	2.7
Total scheduled sea	**3,740**	**3,680**	**-1.7**
Private aircraft	730	610	-16.9
Visiting yachtsmen	30	60	133.3
Total departing passengers	**49,900**	**50,880**	**2.0**

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 passenger depending upon schedules, the time of year and the availability of onward connections. Gatwick, for example, during the winter months attracts a higher proportion of resident passengers due to its onward connections.

Figure 1 on the next page shows the proportion of departing passengers in January that were classified as tourism visits over the past 4 years.

Departing visitors

Figure 1 – Tourism visits as a proportion of total passenger departures, January 2017 – 2020
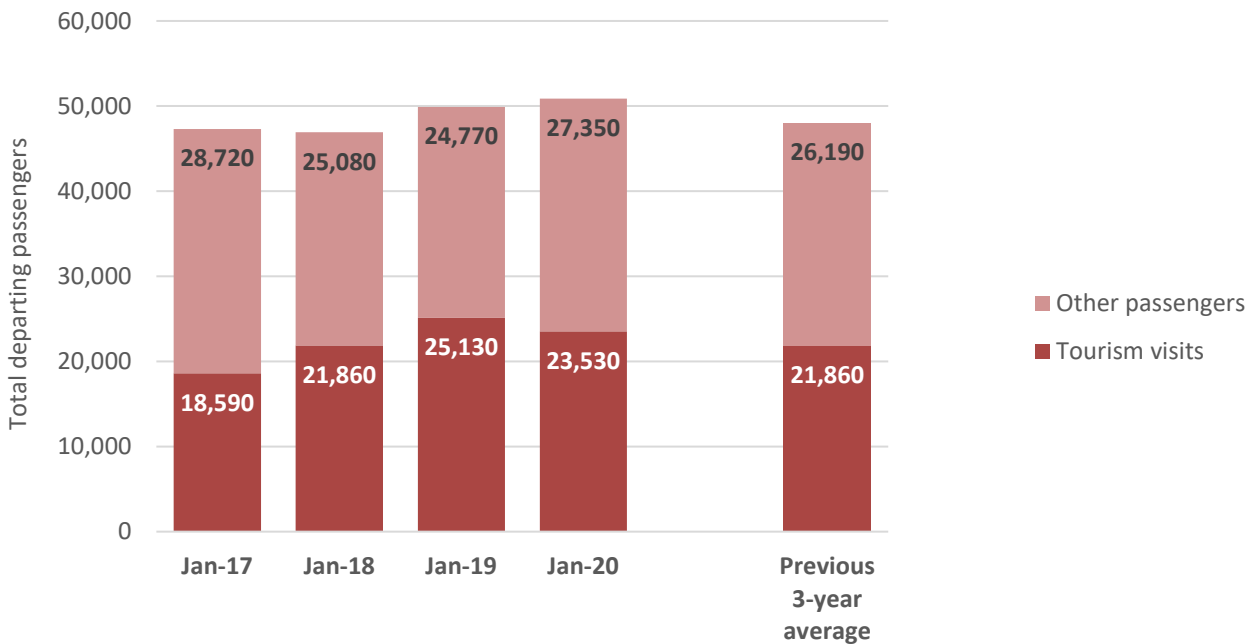
In January 2020, 46.2% of the total departing passengers were visitors at the end of their stay in Jersey. This is lower than the 50.4% seen in 2019 but higher than the previous 3-year average of 45.5%.

Table 2 below shows the breakdown of visits by mode of transport. The majority (86.4%) of visitors departing from Jersey in January 2020 left on scheduled air routes. Of those departing by air, 86.1% were departing to a UK airport, 13.6% were departing to Guernsey and a very small number departed on other foreign air routes. Just over 70% of visitors departing by sea were on the French sea routes.

Table 2 – Breakdown of visits by mode of departure, January 2019 - 2020

	Volumes		
	January 2019	January 2020	Overall change, %
Scheduled air	23,250	20,870	-10.2
Scheduled ferry	1,540	2,290	49.4
Private aircraft	330	300	-8.3
Visiting yachtsmen	30	60	133.3
Cruise passengers	0	0	
Total visits	**25,130**	**23,530**	**-6.4**

The largest fall in visitor numbers was on the scheduled air routes; a decrease of 2,370 visits (-10.2%). There was an increase of 750 visits on the sea routes to the UK, Guernsey and France; almost 50% higher than in January 2019.

Comparing January 2020 with the longer term 3-year average, visitors departing on scheduled air routes showed a 5.7% increase, whilst visitors departing on the scheduled sea routes showed a 21.8% increase.

## Figure 2 – Tourism visits by month, 2017 – 2020
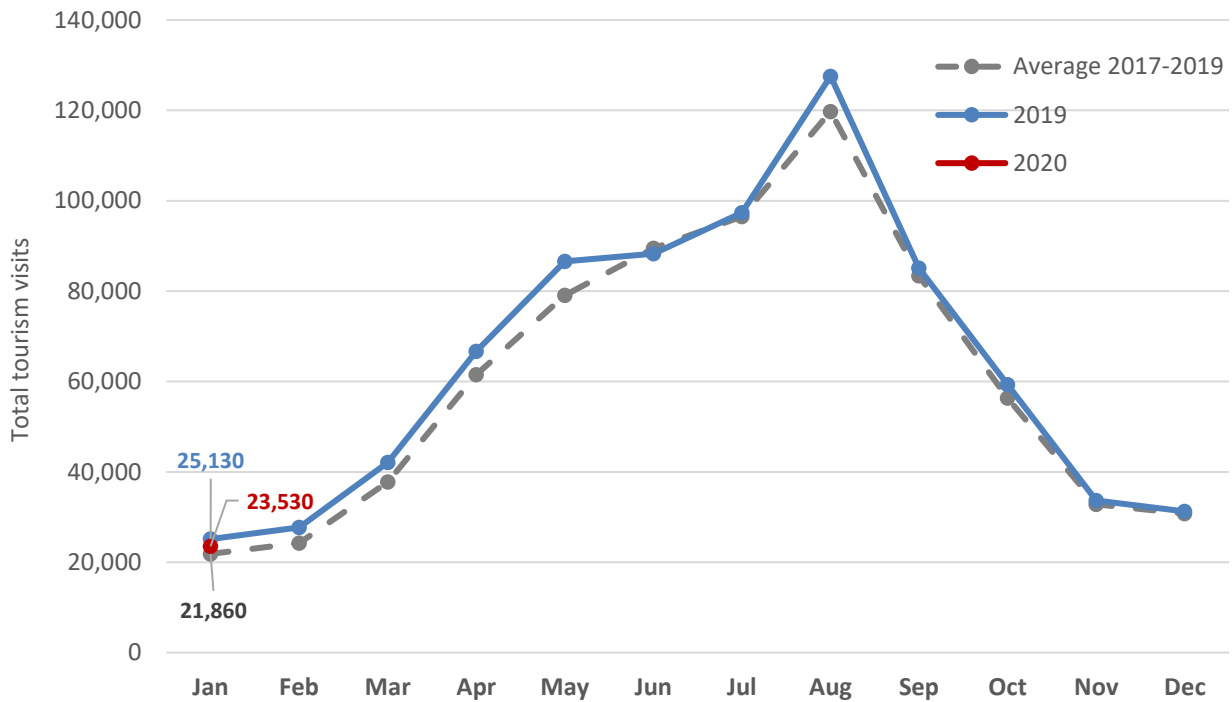
As shown in figure 2, the month of January generally experiences the smallest number of monthly tourism visits to Jersey, contributing to circa. 3% of total annual visits. January also contributes to less than 3% of annual tourism nights spent in the Island due to a lower average length of stay than in the main season from May to September.

Figure 3 – Overnight and day visits, January 2017 – 2020
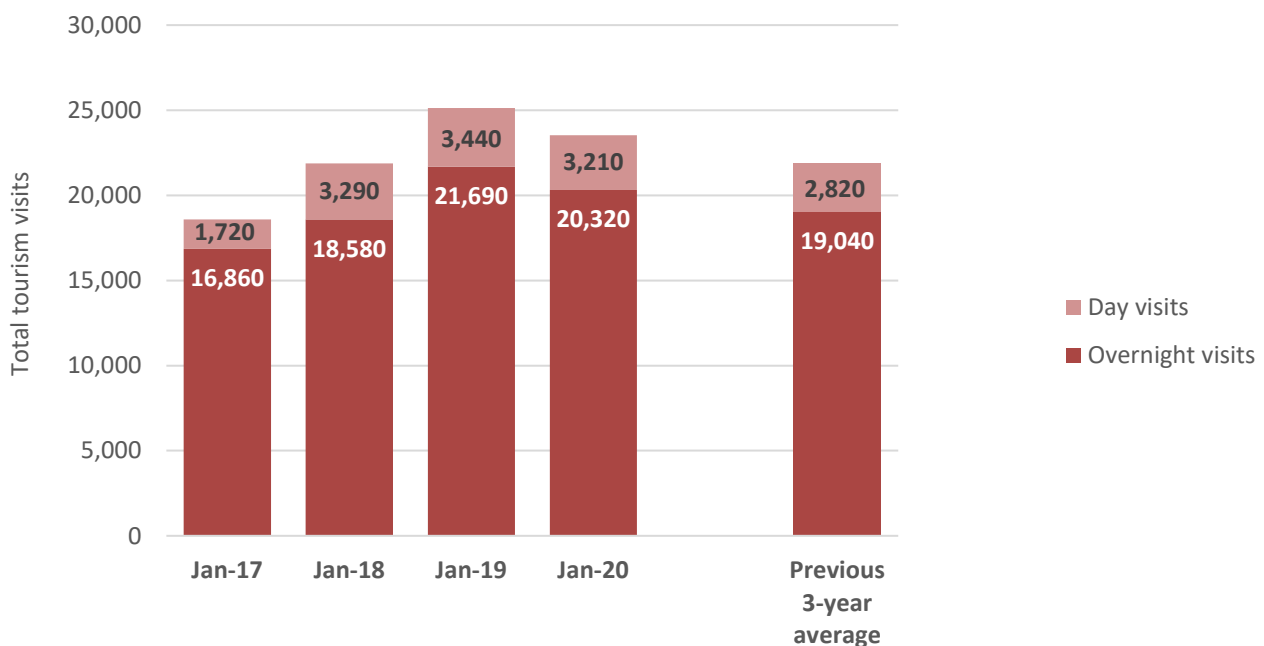
In January 2020, 86.4% of tourism visits involved a stay in Jersey of at least one night. This is very similar to the proportion of overnight visits in 2019. Both the volume of overnight visits and day visits decreased by a similar percentage in January 2020 compared to January 2019. However, both overnight and day visits in January this year were higher than the previous 3-year average.

Figure 4 – Tourism nights spent in Jersey, January 2017 – 2020
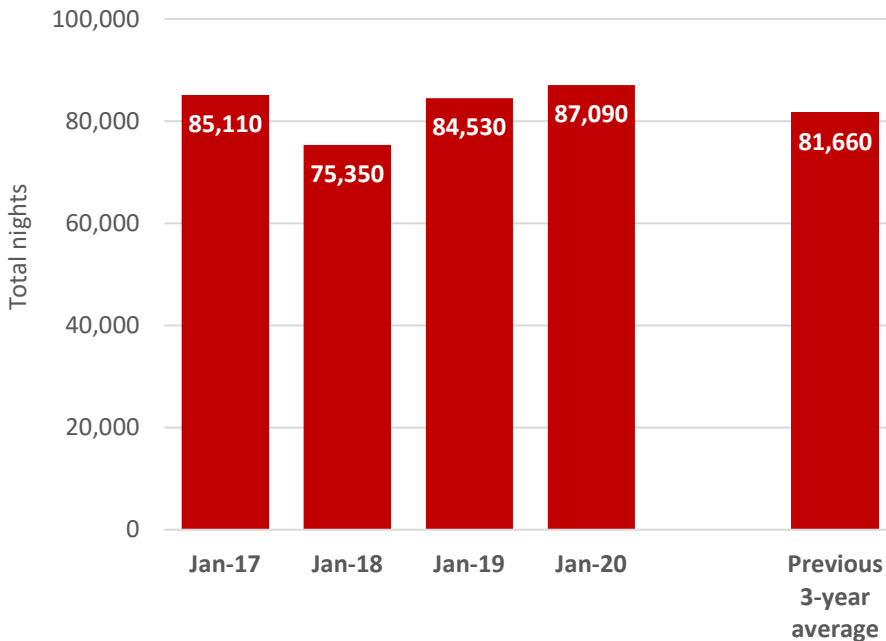
The total number of nights spent in Jersey is calculated by multiplying the number of overnight visits by their average length of stay.

In January 2020, the average stay for visitors staying overnight was 4.3 nights. This shows an increase compared to 3.9 nights in January 2019 but was the same as the previous 3-year average. The increase in average stay has resulted in a 3.0% increase in total nights spent by visitors in Jersey in January 2020 compared to January 2019; the highest January total (87,090) seen over the past 4 years.

Figure 5 – Tourism visits by length of stay, January 2020
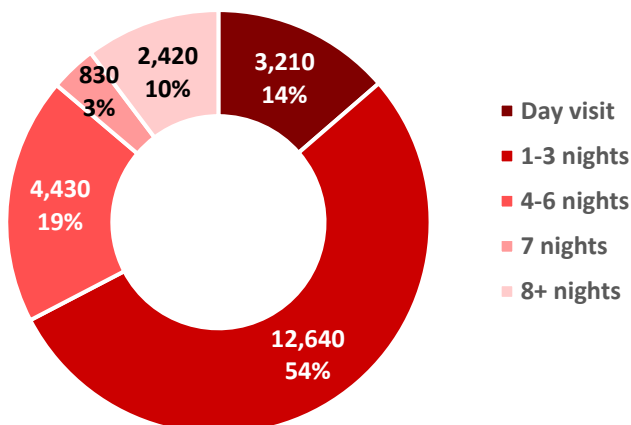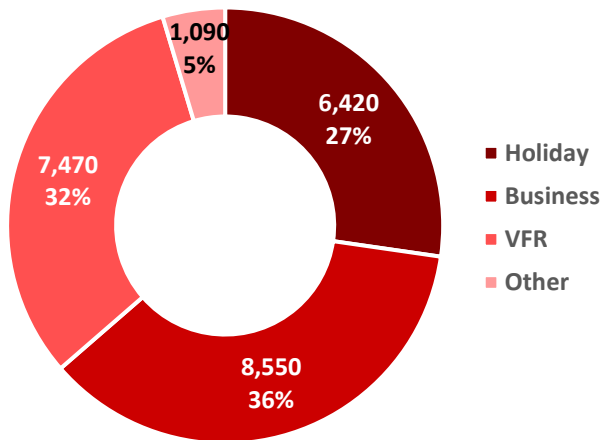

Compared to January 2019:

- Day visits have decreased by 6.8%
- Visits of 1-3 nights decreased by 0.7%
- Visits of 4-6 nights decreased by 20.0%
- Visits of 7 nights decreased by 34.8%
- Visits of 8+ nights increased by 12.4%

Average stay for those staying 1 to 3 nights has increased, whilst average stay for those staying between 4 and 7 nights has remained at a similar level to 2019.

Overall, the increase in overnight stays has mainly been driven by an increase in both the number of those staying for at least 8 nights and their average stay.

NB: Refer to the appendices for the equivalent figures for previous years.

Over the past 4 years, the main increase in visits has been from those staying for a short break of up to 3 nights. In January 2020, these visits accounted for 25,190 nights; an increase of 9.2% compared to 2019 and also 20.2% higher than the 3-year average.

Figure 6 – Tourism visits by purpose, January 2020

Compared to January 2019:

- Holiday visits have decreased by 8.6%
- Business visits have increased by 10.5%
- Visits to friends and relatives (VFR) have increased by 4.9%
- Other visits have decreased by 66.4%

Average stay for holiday visits has decreased from 4.0 nights in 2019 to 3.4 nights in 2020, resulting in a decrease in holiday nights of nearly 20%.

Average stay for business visits has increased from 2.2 nights to 2.9 nights, resulting in an overall increase in business nights of 55.6%.

Average stay for VFR visits has remained the same at 6.3 nights, resulting in an increase in VFR nights of 8.5%.

NB: refer to the appendices for the equivalent figures for previous years. See the footnote on page 1 for visits included within "Other". "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 may stay in commercial accommodation.

Although total holiday visits decreased in January 2020, the number of visits was 14.6% higher than the previous 3-year average. The number of holiday nights spent in the Island was also 10.9% higher than the 3-year average.

The number of business visits and nights both increased significantly compared to January 2019, but were similar to those seen in January 2018.

The number of VFR visits and nights also increased compared to 2019, and both were also higher than the previous 3-year averages.

Table 3 – Purpose of visit, January 2019 - 2020

	Volumes			**Nights**		
	January 2019	**January 2020**	**Overall change, %**	**January 2019**	**January 2020**	**Overall change, %**
Holiday overnight visits	6,780	6,270	-7.6	26,830	21,490	-19.9
Holiday day visits	250	160	-36.6			
Business overnight visits	5,150	6,240	21.2	11,450	17,810	55.6
Business day visits	2,590	2,310	-10.7			
VFR overnight visits	6,740	7,320	8.7	42,540	46,160	8.5
VFR day visits	390	150	-60.9			
Other overnight visits	3,030	500	-83.5	3,710	1,630	-56.2
Other day visits	230	590	161.9			
Total visits	**25,130**	**23,530**	**-6.4**	**84,530**	**87,090**	**3.0**

Figure 7 – Tourism visits by country of residence, January 2020
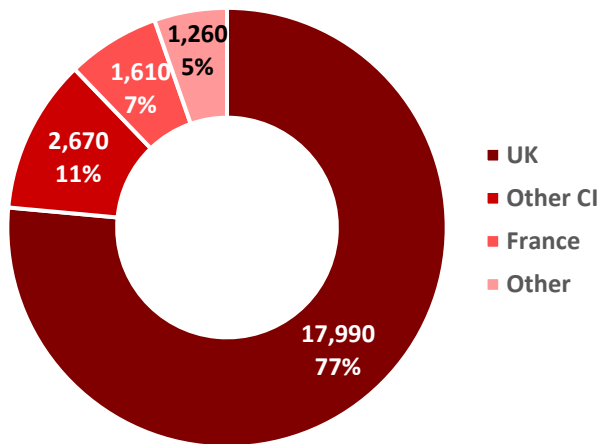
Compared to January 2019:

- UK visits have decreased by 4.5%
- Other CI visits have decreased by 34.3%
- Visits from other countries have increased by 28.9%, mainly due to an increase in visitors from France

- UK visitor nights have decreased by 3.8%
- CI visitor nights have decreased by 10.5%
- Other visitor nights have increased by 45.2%, again mainly due to the French market but also due to an increased average stay

NB: refer to the appendices for the equivalent figures for previous years. Due to the small size of some of the foreign markets, they have been amalgamated into "Other" in this January report. Some of the larger markets will be separated out in the months where tourism volumes increase.

Over three-quarters of the total visits and visitor nights in Jersey in January were from the UK. Although the number of UK visits decreased compared to 2019, the number of visits was 6.4% higher than the 3-year average, with the number of holiday nights spent in the Island also 5.3% higher. The majority (97%) of UK visits to Jersey in January travelled on scheduled air routes.

Jersey's second market in January was from the other Channel Islands. Although the total volume decreased, their average length of stay increased. 87% of visits from Guernsey were on a scheduled air route.

The number of visits from France increased significantly in percentage terms compared to 2019, back to a similar number of visits as recorded in January 2018. France has no regular direct air connections with Jersey over the winter period; 89% of visits were on the scheduled ferry routes.

Table 3 – Country of residence, January 2019 - 2020

	Volumes			**Nights**		
	January 2019	**January 2020**	**Overall change, %**	**January 2019**	**January 2020**	**Overall change, %**
UK	18,840	17,990	-4.5	68,580	65,990	-3.8
Guernsey and Other CI	4,070	2,670	-34.3	3,690	3,300	-10.5
Ireland	60	140	152.6	210	680	224.2
France	550	1,610	196.1	1,510	7,610	403.2
Germany	30	20	-36.7	220	100	-55.7
Other countries	1,600	1,090	-31.4	10,310	9,410	-8.8
Total visits	**25,130**	**23,530**	**-6.4**	**84,530**	**87,090**	**3.0**

Appendix - notes

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 exit survey with a new methodology and definitions to align Jersey's figures more closely with established tourism data produced by other countries and destinations. The fieldwork was outsourced, with the analyses and reporting were undertaken in-house.

From 2020, Statistics Jersey has been contracted to undertake both the exit survey fieldwork and the analyses and reporting. The questionnaires and methodology from January 2020 have been modified, which may have some impact upon the direct comparably of figures with recent years.

Data sources

1.   Passenger exit survey

A detailed breakdown of passengers by route of departure is provided by the Ports of Jersey as well as Condor Ferries for their own sea routes. However, these 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, a comprehensive exit survey is undertaken with a representative and sufficiently robust sample of passengers as they depart through Jersey's passenger terminals at the airport and harbours. 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.
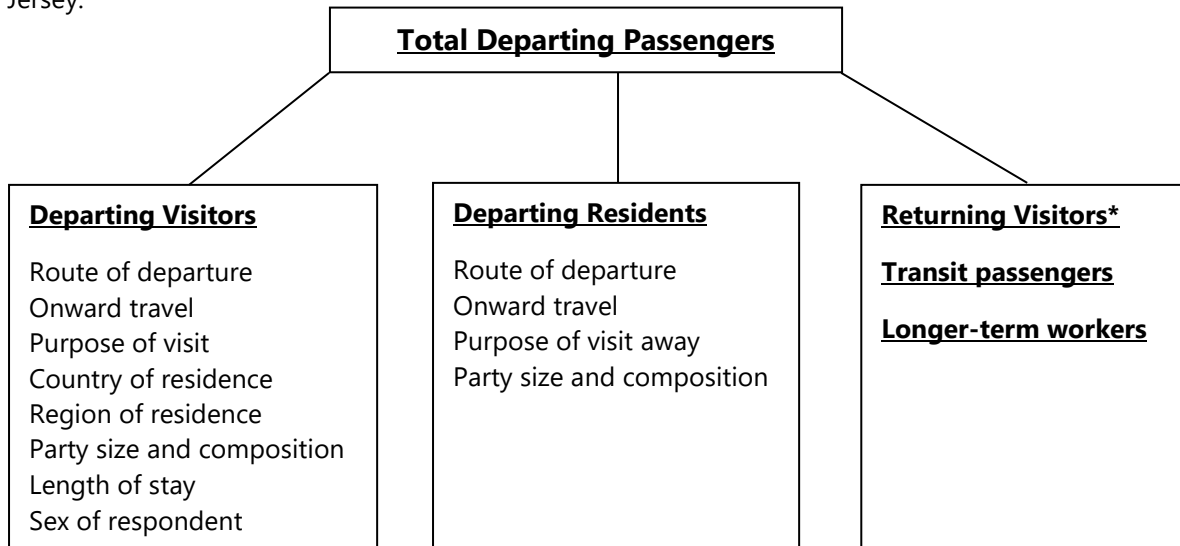
Within each interview shift, fieldworkers are instructed to adopt a randomised approach to interviewee selection so that any departing passenger, whether a resident or a visitor, has an equal likelihood to participate. At the airport and within the ferry terminals, interviews are conducted face-to-face as far as possible using electronic tablets for data collection. Within the car-holding area at Elizabeth Terminal, passengers in vehicles are given a self-completion version of the questionnaire to complete, with the interviewer returning to collect the questionnaire later, or the respondent dropping the completed questionnaire in the collection boxes.

The passenger exit survey questionnaire is very short to establish: 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, length of stay and gender. 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 if required.

Sample data from the passenger exit survey is weighted by passenger figures 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 induced 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 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, and residents are also asked their purpose of visit away from Jersey.

Total Departing Passengers

Departing Visitors

Route of departure
Onward travel
Purpose of visit
Country of residence
Region of residence
Party size and composition
Length of stay
Sex of respondent

Departing Residents

Route of departure
Onward travel
Purpose of visit away
Party size and composition

Returning Visitors*

Transit passengers

Longer-term workers

***Returning visitors are those who are counted twice in passenger numbers because they visit elsewhere during their stay in Jersey (e.g. visitor day trips to Sark, Herm or Jersey).**

2. Visitor survey

The monthly reports showing the breakdown of passengers and visits to Jersey are based upon results from the passenger exit survey. In additional to this and running alongside the passenger exit survey, separate interview shifts are allocated to a longer and more detailed survey of visitors departing from Jersey at the end of their stay. While the exit survey shifts are planned to be randomly representative of all departing passengers, the 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 exit survey, face-to-face interviews are conducted inside the passenger terminals, with self-completion questionnaires being distributed to passengers in non-resident vehicles in the car-holding area at Elizabeth ferry terminal.

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, party composition 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)

Data from the visitor survey is weighted by visitor data established by the exit survey and is reported on a quarterly basis.

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 the marine leisure section to determine the expenditure of visiting yachtsmen in Jersey. Within the monthly reports produced by Statistics Jersey, all visiting yachtsmen are classified as staying holiday visits.

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

Statistical reliability

Sample surveys are always subject to statistical error and the larger the sample size, the lower the statistical variation. This passenger exit survey report for January is based upon 2,000 interviews representing 3,250 departing passengers. Hence, the overall figures for the number of departing visitors on the scheduled air and sea routes should be considered as estimates with a 95% confidence interval of approximately ±1.7%.

For departing visitors only, based upon 910 interviews representing 1,530 visitors, the figures should be considered as estimates with a 95% confidence interval of approximately ±2.5%.

It should be noted that when breaking down the results by individual or amalgamated routes, 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 (e.g. by country of residence).

Response rate and coverage

- The sample size above represents 6.5% of total departing passengers on the scheduled air and sea routes in January.
- Interviewers record the number of refusals as well as the number of self-completion questionnaires handed out in order to determine the response rate; this was 76% in January for the Passenger Exit Survey.

Statistics Jersey
17 April 2020

Appendix – data tables

Table A1: January 2017 to 2020

January	2017		2018		2019		2020		Annual change	
Total passengers	47,310		46,940		49,900		50,880		2%	
Total visits	18,590		21,860		25,130		23,530		-6%	
	Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights
Topline Overnight visits	16,860	85,110	18,580	75,350	21,690	84,530	20,320	87,090	-6%	3%
Day visits	1,720		3,290		3,440		3,210		-7%	

	3-year average 2017 to 2019		2019		2020		Annual change	
	Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights
Total Holiday visits	**5,600**		**7,030**		**6,420**		**-9%**	
- Overnight visits	5,330	19,380	6,780	26,830	6,270	21,490	-8%	-20%
- Day visits	280		250		160		-37%	
Total Business visits	**7,410**		**7,730**		**8,550**		**11%**	
- Overnight visits	5,200	14,840	5,150	11,450	6,240	17,810	21%	56%
- Day visits	2,210		2,590		2,310		-11%	
Total VFR visits	**6,780**		**7,120**		**7,470**		**5%**	
- Overnight visits	6,630	43,240	6,740	42,540	7,320	46,160	9%	9%
- Day visits	150		390		150		-61%	
Total Other visits	**2,070**		**3,250**		**1,090**		**-66%**	
- Overnight visits	1,890	4,190	3,030	3,710	500	1,630	-83%	-56%
- Day visits	180		230		590		162%	
Country of residence UK	16,900	62,660	18,840	68,580	17,990	65,990	-5%	-4%
Other CI	2,450	2,490	4,070	3,690	2,670	3,300	-34%	-11%
Ireland	170	1,520	60	210	140	680	153%	224%
France	940	3,420	550	1,510	1,610	7,610	196%	403%
Germany	50	370	30	220	20	100	-37%	-56%
Other	1,350	11,190	1,600	10,310	1,090	9,410	-31%	-9%
Mode of departure Scheduled air	19,750	70,980	23,250	78,060	20,870	73,840	-10%	-5%
Scheduled ferry	1,880	10,440	1,540	6,090	2,290	12,870	49%	111%
Private plane	200	200	330	330	300	300	-8%	-8%
Visiting yachtsmen	30	40	30	50	60	80	133%	78%
Cruise passengers	0	0	0	0	0	0		
Duration of stay Day visits	2,820		3,440		3,210		-7%	
1-3 nights	11,150	20,950	12,720	23,080	12,640	25,190	-1%	9%
4 - 6 nights	4,980	22,480	5,540	25,100	4,430	20,160	-20%	-20%
7 nights	770	5,390	1,280	8,970	830	5,830	-35%	-35%
8+ nights	2,140	32,840	2,160	27,370	2,420	35,910	12%	31%