4insight

January 2023 - Monthly Exit Survey Results

The number of departing passengers provided by the Ports and Condor are used in conjunction with the Monthly Exit Survey (administered to passengers departing on scheduled air and sea routes) to monitor visitor performance and provide an understanding of visitor characteristics. The results contribute to Visit Jersey's analysis of how the visitor economy is recovering since the pandemic. Due to Covid, the Exit Survey did not run from April 2020 to the end of 2021, but we were able to monitor performance through the passenger numbers and profile information provided through the Government of Jersey's travel registration forms.

January 2023 compared to January 2019

- The total number of **departing passengers**[1] from Jersey was **36,860**, reflecting a recovery to three-quarters (74%) of 2019 levels.

- Of all departing passengers, 38% were **tourism visitors[2]** who had reached the end of their stay in Jersey **(13,970)** reflecting a lower proportion than that seen in 2019 when visitors accounted for almost half (47%) of all departing passengers.

- The number of day visitors continues to be impacted greater than the number overnight visitors; in January 2023 a **total of 12,940** visitors stayed in Jersey for at least one night recovering to 60% of previous levels whilst the number of day visitors **(1,030)** recovered to 30%.

- The **average length of stay** was 5.4 nights (for those visitors staying for at least one night), which is the longest average length of stay observed in the first month of the year since at least 2017.

- The longer average length of stay resulted in a recovery of visitors nights (total number of nights spent by all visitors to Jersey) to **70,000** reflecting a 83% recovery.

- Breaking the visitor numbers down by main **purpose of visit**:

  - **holiday** visits accounted for 15% of all visits at 2,060

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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.

- **business** visits accounted for 30% of visits at 4,160

- **visits to friends and family** accounted for around half (48%) of visits at 6,710

- The total number of holiday visits recovered to 29% of levels seen in January 2019; the number of visitor nights spent my holiday makers recovered to a similar level (26% of Jan 2019).

- The total number of business visitors recovered to around half (54%) of previous levels however due to an increased average length of stay for this visitor type the number of visitor nights increased by 2%.

- The number of visits to see friends and relatives was similar to in 2019 (recovering to 94%) and the number of visitor nights increased by 15%.

- Breaking the visitor numbers down by **travel method**:

  - 93% of visitors travelled via **scheduled air** routes (13,050), recovering to 56% of 2019 levels

  - 5% of visitors travelled via **scheduled ferry** services (680), recovering to 44% of 2019 levels

- Breaking visitor numbers down by **country of residence**:

  - 80% of visitors were from the **UK** (11,140)

  - 10% of visitors were from the other Channel Islands (1,330)

  - 1% of visitors were from **France** (1,150)

- The number of visitors staying for 8 days or more increased by 4% compared to January 2019 and the number of visitor nights for these longer stay visitors increased by two-fifths (+39%).

- The number of visitors staying for 1 to 3 days, 4 to 6 days and 7 days each recovered to around half of previous levels.

January 2023 compared to January 2022

- The total number of **departing passengers** increased by two-fifths (39%) compared with the same period of 2022.

- The number of **departing visitors** has increased by a fifth (19%).

- The number of overnight visitors (visitors staying at least one night) increased by 22%; in comparison the number of day visitors decreased by 10%.

- The **average length of stay** (for those visitors staying for at least one night) has increased from 4.4 nights in January 2022 to 5.4 nights in January 2023 resulting in the total number of visitor nights increasing by 50%.

- The number of holiday visitors in January 2023 has decreased by almost a third (31%) compared to the same period of 2022.

- In comparison, the number of visitors here to see friends and relatives increased by 62% and the number of nights spent by this visitor type increased by 85%.

- The number of business visitors was very similar to in January 2022 (-2%) however the number of visitors nights increased by a fifth (22%).

- In the first month of 2023, the **UK market** has shown a 9% increase when compared with the same period of 2022; the number of UK visitor nights was up by 26%.

- The number of visits from all other major markets **(other Channel islands, Ireland, Germany and other foreign countries)** saw significant increases compared to January 2022 excluding visits from **France** which saw a decrease of 60%.

- Visits made on scheduled air routes increased by almost a quarter (23%) in January 2023 whilst the number visits made by scheduled sea routes decreased by 15% compared January 2022.

Table A1: January 2017 to January 2023

January	3-year average 2017 to 2019		2019		2021	2022		2023		Change 23/19		Change 23/22	
Total passengers	48,050		49,900		3,040	26,440		36,860		-26%		39%	
Total visits	21,860		25,130		410	11,730		13,970		-44%		19%	
	Visits	Nights	Visits	Nights	Visits	Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights
Overnight visits	19,040	81,660	21,692	84,526	410	10,580	46,600	12,940	70,000	-40%	-17%	22%	50%
Day visits	2,820		3,440			1,150		1,030		-70%		-10%	

	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 Holiday visits	**5,600**		**7,030**		**0**	**2,990**		**2,060**		**-71%**		**-31%**	
- Overnight visits	5,330	19,380	6,780	26,830	0	2,910	9,780	1,990	6,970	-71%	-74%	-32%	-29%
- Day visits	280		250		0	80		80		-68%		-1%	
Total Business visits	**7,410**		**7,730**		**140**	**4,230**		**4,160**		**-46%**		**-2%**	
- Overnight visits	5,200	14,840	5,150	11,450	140	3,340	9,580	3,400	11,680	-34%	2%	2%	22%
- Day visits	2,210		2,590		0	890		760		-71%		-15%	
Total VFR visits	**6,780**		**7,120**		**270**	**4,130**		**6,710**		**-6%**		**62%**	
- Overnight visits	6,630	43,240	6,740	42,540	270	4,070	26,470	6,670	48,940	-1%	15%	64%	85%
- Day visits	150		390		0	60		40		-89%		-32%	
Total Other visits	**2,070**		**3,250**		**0**	**380**		**1,050**		**-68%**		**175%**	
- Overnight visits	1,890	4,190	3,030	3,710	0	260	770	890	2,410	-71%	-35%	242%	212%
- Day visits	180		230		0	120		160		-31%		31%	

Country of residence

	Visits	Nights	Visits	Nights		Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights
UK	16,900	62,660	18840	68580		10,190	39,270	11,140	49,460	-41%	-28%	9%	26%
Other CI	2,450	2,490	4070	3690		550	770	1,330	1,950	-67%	-47%	141%	153%
Ireland	170	1,520	60	210		80	340	100	270	68%	27%	20%	-21%
France	940	3,420	550	1510		360	1,490	150	940	-73%	-38%	-60%	-37%
Germany	50	370	30	220		10	30	50	380	63%	72%	390%	1157%
Other	1,350	11,190	1600	10310		540	4,700	1,220	17,000	-23%	65%	126%	262%

Mode of departure

	Visits	Nights	Visits	Nights		Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights
Scheduled air	19,750	70,980	23250	78060		10,630	40,260	13,050	65,020	-44%	-17%	23%	62%
Scheduled ferry	1,880	10,440	1540	6090		800	6,020	680	4,720	-56%	-22%	-15%	-22%
Private plane	200	200	330	330		280	280	230	230	-28%	-28%	-16%	-16%
Visiting yachtsmen	30	40	30	50		20	40	20	20	-44%	-60%	-25%	-55%
Cruise passengers	0	0	0	0		0	0	0	0				

Duration of stay

	Visits	Nights	Visits	Nights		Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights
Day visits	2,820		3,440	0		1,150		1,030		-70%		-10%	
1-3 nights	11,150	20,950	12720	23080		6,510	13,540	7,330	14,620	-42%	-37%	13%	8%
4 - 6 nights	4,980	22,480	5540	25100		2,310	10,410	2,660	12,260	-52%	-51%	15%	18%
7 nights	770	5,390	1280	8970		450	3,150	710	4,970	-44%	-45%	58%	58%
8+ nights	2,140	32,840	2160	27370		1,310	19,500	2,240	38,140	4%	39%	71%	96%

Exit Survey

Due to the Covid situation that was ongoing throughout 2021, the Exit Survey did not run during that year. However, the tables above contain figures for 2021 based on the data that was collected through the Government of Jersey's travel registration form that arriving passengers were required to complete before travelling to Jersey during this period. Please note that the 2021 data should be viewed in light of the following caveats:

- The methodology relating to the 2021 data as compared to the 2022 data is different, as the 2021 data originates from the self-completed Government travel registration form and the 2022 data (and other years of data) are based on the Exit Survey data. This difference in the methodology must be kept in mind when making comparisons between the 2021 and 2022 data.

- The Exit Survey data includes a grouped category of "Other" in relation to visit purpose, which is included within the total number of visits. The Government travel registration form contained different visit purpose categories and did not have the same definitions that applied to the purpose of visit question in the Exit Survey.

- 'Leisure/Holiday' was added as a visit purpose option to the Government travel registration form in May 2021.

- The Government travel registration form data relates to arriving passengers rather than departing passengers and relied upon self-completion. Closer scrutiny of the data highlighted some data quality issues, possibly due to people misunderstanding the questions or answer options within the form.

- The 2021 data from the Government travel registration form was published on the Government of Jersey's website. Certain adjustments were made by Visit Jersey to proportionately reallocate unstated or 'don't know' responses with calculations based upon the travel registration data grossed up by passenger arrivals data.

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.

As fieldwork had not yet commenced in January 2022, the breakdown of visitor figures for that month are based on estimates (informed by data collected in the same period of previous years) and actual passenger number provided by the Ports and Condor.