



## February 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.

### February 2023 compared to February 2019

- The total number of **departing passengers**<sup>1</sup> from Jersey was **48,460**, reflecting a recovery to 85% of 2019 levels.
- Of all departing passengers, 35% were **tourism visitors**<sup>2</sup> who had reached the end of their stay in Jersey (**17,130**) reflecting a lower proportion than that seen in 2019 when visitors accounted for almost half (48%) of all departing passengers.
- The number of tourism visitors recovered to 62% of 2019 levels.
- For the first time in at least a year (since field research was re-launched following Covid-19), the day trip market (69% recovery) showed a stronger recovery than the overnight market (61%).
- The **average length of stay** was 4.0 nights (for those visitors staying for at least one night), was almost a day higher than the same period of 2019 (3.1 nights).
- The number of visitors nights (total number of nights spent by all visitors to Jersey) was **63,600** reflecting an 80% recovery.
- Breaking the visitor numbers down by main **purpose of visit**:
  - **holiday** visits accounted for 37% of all visits at 6,350

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<sup>1</sup> 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.

<sup>2</sup> 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 a quarter (26%) of visits at 4,500
  - **visits to friends and family** accounted for a third (32%) of visits at 5,550
  - The total number of holiday visits recovered to 44% of levels seen in February 2019; the number of visitor nights spent by holiday makers recovered to a similar level (46% of Feb 2019).
  - The total number of business visitors recovered to 80% of previous levels however due to an increased average length of stay for this visitor type the number of visitor nights increased by a third (+35%)
  - The number of visits to see friends and relatives was almost identical to 2019 (within 1 percentage point difference) and the number of visitor nights increased by 13%.
  - Breaking the visitor numbers down by **travel method**:
    - 78% of visitors travelled via **scheduled air** routes (13,350), recovering to 55% of 2019 levels
    - 20% of visitors travelled via **scheduled ferry** services (3,410); scheduled sea services showed a monthly increase compared to 2019 for the first time in at least a year (+20%).
  - Breaking visitor numbers down by **country of residence**:
    - 72% of visitors were from the **UK** (12,400)
    - 11% of visitors were from the other Channel Islands (1,840)
    - 13% of visitors were from **France** (2,210); the number of visitors from France more than doubled (+131%) when compared to 2019 (960).
  - The number of visitors staying for 8 days or more increased by 8% and the number of visitor nights for these longer stay visitors increased by 91%.
  - The number of visitors staying for 1 to 3 days, 4 to 6 days and 7 days each recorded decreases when compared to 2019.
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## February 2023 compared to February 2022

- The total number of **departing passengers** increased by over a quarter (28%) compared with the same period of 2022.
- The number of **departing visitors** increased by 8%.
- The number of overnight visitors (visitors staying at least one night) increased by 8% and the number of day visitors decreased by 5%.
- The **average length of stay** (for those visitors staying for at least one night) has decreased marginally from 4.4 nights in February 2022 to 4.0 nights in February 2023; due to the increased number of visitors the total number of visitor nights has remained consistent with 2022 (-1%).
- The number of holiday visitors in February 2023 increased marginally by 5% compared to the same period of 2022; whilst the number of overnight holiday visits remained largely consistent, the number of holiday day visits increased significantly by 192%.
- The number of business visitors increased by 44% compared to 2022 whilst the number of people travelling to see friends and family remained consistent (+1%).
- Excluding France and 'Other foreign countries', declines in visitor numbers were observed for all major markets when compared to 2022.
- In comparison the number of visitors from France was almost 4 times as great as in the same period of 2022 (+289%). In 2022 Jersey's Safer Travel Policy was suspended on the 7<sup>th</sup> February. Inbound travel to the island returned to unrestricted, pre-pandemic measures, including the removal of all testing and isolation for all arriving passengers. This means that French visitor figures for most of February 2022 were likely still negatively impacted<sup>3</sup>.
- The number of visitors from 'Other foreign countries' increased by a quarter (+25%). Again, this may be impacted by the fact that Jersey only removed all testing and isolation on the 7<sup>th</sup> February 2022, which is likely to have negatively impacted visitor numbers.
- Visits made on scheduled air routes declined marginally (-4%) whilst the number visits made by scheduled sea routes almost doubled (+97%).

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<sup>3</sup> <https://www.bbc.co.uk/news/world-europe-jersey-60264002>

**Table A1: February 2017 to February 2023**

February		<u>3-year average 2017 to 2019</u>		<u>2019</u>		<u>2021</u>		<u>2022</u>		<u>2023</u>		<u>Change 23/19</u>		<u>Change 23/22</u>	
Total passengers		55,710		57,290		1,910		37,890		48,460		-15%		28%	
Total visits		24,230		27,710		330		15,910		17,130		-38%		8%	
		Visits	Nights	Visits	Nights	Visits		Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights
	Overnight visits	22,540	74,420	25,889	79,910	330		14,730	64,460	15,880	63,600	-39%	-20%	8%	-1%
	Day visits	1,690		1,820		0		1,190		1,250		-31%		5%	
		<u>3-year average 2017 to 2019</u>		<u>2019</u>		<u>2021</u>		<u>2022</u>		<u>2023</u>		<u>Change 23/19</u>		<u>Change 23/22</u>	
		Visits	Nights	Visits	Nights	Visits		Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights
	<b>Total Holiday visits</b>	<b>11,590</b>		<b>14,400</b>		<b>0</b>		<b>6,060</b>		<b>6,350</b>		<b>-56%</b>		<b>5%</b>	
	- Overnight visits	11,380	35,540	14,060	40,200	0		5,840	22,790	5,680	18,200	-60%	-55%	-3%	-20%
	- Day visits	220		340		0		230		670		97%		192%	
	<b>Total Business visits</b>	<b>6,100</b>		<b>5,640</b>		<b>130</b>		<b>3,130</b>		<b>4,500</b>		<b>-20%</b>		<b>44%</b>	
	- Overnight visits	4,730	13,310	4,380	11,460	130		2,810	10,370	3,990	15,530	-9%	35%	42%	50%
	- Day visits	1,370		1,250		0		320		510		-60%		60%	
	<b>Total VFR visits</b>	<b>5,000</b>		<b>5,630</b>		<b>200</b>		<b>5,500</b>		<b>5,550</b>		<b>-1%</b>		<b>1%</b>	
	- Overnight visits	4,970	22,510	5,560	25,270	200		5,420	29,030	5,490	28,440	-1%	13%	1%	-2%
	- Day visits	30		60		0		90		60		-3%		-29%	
	<b>Total Other visits</b>	<b>1,530</b>		<b>2,040</b>		<b>0</b>		<b>1,210</b>		<b>740</b>		<b>-64%</b>		<b>-39%</b>	
	- Overnight visits	1,460	2,910	1,880	2,970	0		660	2,270	730	1,430	-61%	-52%	10%	-37%
	- Day visits	70		160		0		550		10		-94%		-98%	
Country of residence	UK	18,050	59,470	20120	63570			12,710	51,300	12,400	47,450	-38%	-25%	-2%	-8%
	Other CI	3,270	5,170	5400	9520			2,040	5,100	1,840	3,600	-66%	-62%	-10%	-30%
	Ireland	250	1,490	160	610			40	110	10	30	-94%	-96%	-75%	-76%
	France	1,400	3,170	960	1870			570	1,920	2,210	5,530	131%	196%	289%	189%
	Germany	50	190	50	40			50	190	30	110	-33%	157%	-35%	-41%
	Other	1,200	4,920	1040	4300			520	5,840	650	6,890	-37%	60%	25%	18%
Mode of departure	Scheduled air	21,190	65,700	24410	70960			13,860	55,350	13,350	51,950	-45%	-27%	-4%	-6%
	Scheduled ferry	2,720	8,370	2840	8410			1,730	8,770	3,410	11,240	20%	34%	97%	28%
	Private plane	260	260	370	370			310	310	330	330	-10%	-10%	8%	8%
	Visiting yachtsmen	50	80	90	170			20	40	50	80	-51%	-51%	171%	131%
	Cruise passengers	0	0	0	0			0	0	0	0	0%		0%	
Duration of stay	Day visits	1,690		1,820	0			1,190		1,250		-31%		5%	
	1-3 nights	15,560	33,190	18930	38430			8,960	20,590	10,470	21,850	-45%	-43%	17%	6%
	4 - 6 nights	5,090	22,270	4540	20520			3,580	16,120	3,690	16,260	-19%	-21%	3%	1%
	7 nights	1,030	7,110	1430	9990			960	6,750	650	4,540	-55%	-55%	-33%	-33%
	8+ nights	870	11,850	990	10970			1,220	21,000	1,070	20,960	8%	91%	-12%	0%

**Table A2: Cumulative - January to February 2017 to 2023**

Year to date		3-year average 2017 to 2019		2018		2019		2022		2023		Change 23/19		Change 23/22	
Total passengers		103,760		101,850		107,180		64,330		85,320		-20%		33%	
Total visits		46,090		43,270		52,840		27,640		31,110		-41%		13%	
		Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights
Topline	Overnight visits	41,580	156,080	37,910	139,840	47,580	164,440	25,310	111,060	28,830	133,600	-39%	-19%	14%	20%
	Day visits	4,500		5,360		5,260		2,340		2,280		-57%		-2%	
		3-year average 2017 to 2019		2018		2019		2022		2023		Change 23/19		Change 23/22	
		Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights
Purpose of visit	<b>Total Holiday visits</b>	<b>17,200</b>		<b>13,450</b>		<b>21,430</b>		<b>9,050</b>		<b>8,420</b>		<b>-61%</b>		<b>-7%</b>	
	- Overnight visits	16,700	54,920	12,890	45,910	20,850	67,040	8,750	32,570	7,670	25,180	-63%	-62%	-12%	-23%
	- Day visits	490		560		590		310		750		28%		142%	
	<b>Total Business visits</b>	<b>13,510</b>		<b>15,430</b>		<b>13,370</b>		<b>7,360</b>		<b>8,650</b>		<b>-35%</b>		<b>18%</b>	
	- Overnight visits	9,930	28,150	10,970	30,020	9,530	22,910	6,150	19,950	7,390	27,210	-22%	19%	20%	36%
	- Day visits	3,580		4,460		3,840		1,210		1,260		-67%		5%	
	<b>Total VFR visits</b>	<b>11,790</b>		<b>11,020</b>		<b>12,750</b>		<b>9,630</b>		<b>12,260</b>		<b>-4%</b>		<b>27%</b>	
	- Overnight visits	11,600	65,760	10,950	53,770	12,300	67,800	9,490	55,500	12,160	77,390	-1%	14%	28%	39%
	- Day visits	180		70		450		150		100		-77%		-30%	
	<b>Total Other visits</b>	<b>3,600</b>		<b>3,380</b>		<b>5,300</b>		<b>1,590</b>		<b>1,780</b>		<b>-66%</b>		<b>12%</b>	
- Overnight visits	3,350	7,110	3,110	10,150	4,910	6,690	920	3,040	1,610	3,830	-67%	-43%	75%	26%	
- Day visits	250		270		390		670		170		-57%		-75%		
Country of residence	UK	34,950	122,140	33,580	111,630	38,960	132,150	22,900	90,570	23,530	96,910	-40%	-27%	3%	7%
	Other CI	5,720	7,660	4,180	5,200	9,460	13,210	2,590	5,870	3,160	5,550	-67%	-58%	22%	-6%
	Ireland	430	3,010	340	2,170	210	820	120	450	110	300	-51%	-64%	-9%	-35%
	France	2,340	6,590	2,330	6,920	1,500	3,380	930	3,410	2,360	6,470	57%	91%	154%	90%
	Germany	100	560	130	400	80	260	60	220	80	490	5%	86%	41%	122%
	Other	2,550	16,110	2,720	13,530	2,630	14,620	1,060	10,540	1,870	23,890	-29%	63%	77%	127%
Mode of departure	Scheduled air	40,940	136,680	37,840	114,970	47,650	149,020	24,490	95,610	26,400	116,970	-45%	-22%	8%	22%
	Scheduled ferry	4,600	18,810	5,020	24,450	4,380	14,500	2,530	14,790	4,090	15,960	-7%	10%	62%	8%
	Private plane	460	460	370	370	700	700	590	590	570	570	-19%	-19%	-4%	-4%
	Visiting yachtsmen	80	120	40	50	120	220	40	80	60	100	-49%	-53%	65%	33%
	Cruise passengers	0	0	0	0	0	0	0	0	0	0	0%	0%	0%	0%
Duration of stay	Day visits	4,500	0	5,360		5,260		2,340		2,280		-57%	0%	-2%	
	1-3 nights	26,710	54,140	24,080	49,340	31,650	61,510	15,470	34,130	17,800	36,460	-44%	-41%	15%	7%
	4 - 6 nights	10,070	44,750	10,000	42,280	10,080	45,620	5,890	26,530	6,350	28,520	-37%	-37%	8%	8%
	7 nights	1,800	12,500	1,400	9,600	2,710	18,960	1,410	9,900	1,360	9,510	-50%	-50%	-4%	-4%
	8+ nights	3,010	44,690	2,430	38,620	3,150	38,350	2,530	40,500	3,310	59,100	5%	54%	31%	46%

## 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.