4insight

March 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.

Monthly summary

March 2023 compared to March 2019

- The total number of **departing passengers**[1] from Jersey was **56,780**, reflecting a recovery to 79% of 2019 levels.

- Of all departing passengers, 41% were **tourism visitors[2]** who had reached the end of their stay in Jersey **(23,450)** reflecting a lower proportion than that seen in 2019 (59%) and when compared to the three-year average for 2017 to 2019 (54%).

- The number of tourism visitors recovered to 56% of 2019 levels.

- The day trip market recovered to 42% of 2019 levels whilst the overnight market recovered to 58%.

- The **average length of stay** (3.7 nights) continues to be longer than in the same period of 2019 (2.9 nights) although it was almost identical to the three year average recorded for 2017 to 2019 (3.7 nights).

- The number of visitor nights (total number of nights spent by all visitors to Jersey) was **78,680** reflecting a 74% recovery.

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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.

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

  - **holiday** visits accounted for 39% of all visits at 9,110

  - **business** visits accounted for a quarter (22%) of visits at 5,050

  - **visits to friends and family** accounted for a quarter (26%) of visits at 6,110

- The total number of holiday visits recovered to 40% of levels seen in March 2019 and the number visitor nights recovered to around half (51%).

- The total number of business visitors recovered to 85% of 2019 levels; whilst the number of overnight business visits was almost identical to in March 2019, the number of business day visits continued to be significantly impacted (-75%).

- The number of visits to see friends and relatives was similar to in 2019 (+3%) whilst the number of visitors nights for this visitor type increased by 42%.

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

  - 87% of visitors travelled via **scheduled air** routes (20,350), recovering to 59% of 2019 levels

  - 11% of visitors travelled via **scheduled ferry** services (2,690); whilst the number of visitors travelling by scheduled ferry services continues to be significantly impacted (-62% compared to March 2019) the number of visitor nights for those travelling by ferry has shown an increase of 14%

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

  - 80% of visitors were from the **UK** (18,730)

  - 10% of visitors were from the other Channel Islands (2,270)

  - 6% of visitors were from **France** (1,460)

- Day trip and shorter stay markets continue to be impacted more significantly than longer stay markets:

  - the 1 to 3 night stay market recovered to around half (51%) of 2019 levels; this compares to a recovery of 89% for the 8 night + market (the latter showed an increase in visitors nights of 24%)

March 2023 compared to March 2022

- The total number of **departing passengers** increased by a fifth (18%) compared with the same period of 2022.

- The number of **departing visitors** increased by a similar proportion (16%).

- The number of overnight visitors (visitors staying at least one night) increased by 15% and the number of day visitors increased by 30%.

- The **average length of stay** (for those visitors staying for at least one night) decreased marginally from 3.9 in March 2022 to 3.7 in March 2023; the average length of stay has seen decreases in every month of 2023 when compared to 2022.

- The number of holiday visitors in March increased by 16% compared to the same period of 2022; the number of holiday overnight visits increased by 16% compared to an increase of 32% for holiday day visits.

- The number of business visitors and those travelling to see friends and family both increased marginally compared to 2022 (+4 and +3% respectively).

- Increases in visitor numbers were observed for all major markets when compared to 2022 but in particular for the French visitor market which more than doubled when compared to March 2022 (+123%).

- For the second month in a row, scheduled sea routes have seen a stronger recovery than scheduled air routes in terms of visitor numbers; in March 2023 the number of visitors on scheduled sea routes increased by 48% 2022 whilst scheduled air routes increased by 14%.

Year-to-date summary

January – March 2022 compared to January – March 2019

- The total number of **departing passengers (142,100)** has recovered to 80% of 2019 levels.

- The number of **departing visitors (54,550)** has recovered to 57% of 2019 levels.

- The **average length of stay** (for those visitors staying for at least one night) has increased from 3.2 nights in 2019 to 4.2 nights in 2023 resulting in the total number of visitor nights recovering to 78% of previous levels.

- **Holiday and leisure visits** recovered to 40% of 2019 levels (17,520), whilst **business visits** showed a strong recovery to 71% and **visits to friends and relatives** was largely on par with 2019 (-2%). For visits to friends and relatives the number of overnight visits increased by 21%

- The **UK and French markets** have shown a considerable recovery in 2023, with the number of visits from these countries returning to around three-fifths of that seen in 2019 (62% and 58% respectively).

January – March 2023 compared to January - March 2022

Comparing these first 3 months of 2023 to the same period during 2022:

- the total volume of visits has increased by 14%.

- looking at each of the visit purpose categories individually, visits for business and to see friends and relatives have each increased by over 10%. Holiday visits are up by 4%, this is largely due to the fact holiday day visits have almost doubled (an increase of 92%)

Table A1: March 2017 to March 2023

March	3-year average 2017 to 2019		2019		2021		2022		2023		Change 23/19		Change 23/22	
Total passengers	70,520		71,490		2,742		48,060		56,780		-21%		18%	
Total visits	38,000		42,070		550		20,150		23,450		-44%		16%	
	Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights
Overnight visits	34,350	126,740	36,961	107,007	550		18,510	71,500	21,320	78,680	-42%	-26%	15%	10%
Day visits	3,650		5,110		0		1,640		2,120		-58%		30%	

	3-year average 2017 to 2019		2019		2021		2022		2023		Change 23/19		Change 23/22	
	Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights
Total Holiday visits	**21,330**		**22,870**		**0**		**7,850**		**9,110**		**-60%**		**16%**	
- Overnight visits	20,390	64,140	21,680	59,370	0		7,590	27,970	8,770	30,140	-60%	-49%	16%	8%
- Day visits	940		1,190		0		260		340		-71%		32%	
Total Business visits	**6,070**		**5,950**		**200**		**4,850**		**5,050**		**-15%**		**4%**	
- Overnight visits	4,820	24,070	4,710	17,450	200		4,170	12,670	4,740	14,430	1%	-17%	14%	14%
- Day visits	1,250		1,240		0		680		310		-75%		-54%	
Total VFR visits	**5,280**		**5,910**		**350**		**5,920**		**6,110**		**3%**		**3%**	
- Overnight visits	5,170	23,820	5,760	20,460	350		5,850	28,320	6,040	29,090	5%	42%	3%	3%
- Day visits	110		150		0		70		80		-48%		8%	
Total Other visits	**5,310**		**7,350**		**0**		**1,530**		**3,180**		**-57%**		**108%**	
- Overnight visits	3,970	14,710	4,820	9,720	0		910	2,540	1,780	5,030	-63%	-48%	97%	98%
- Day visits	1,350		2,530		0		620		1,390		-45%		123%	

Country of residence

	3-year average 2017 to 2019		2019		2021		2022		2023		Change 23/19		Change 23/22	
UK	25,570	93,440	29430	85430			16,630	60,900	18,730	65,480	-36%	-23%	13%	8%
Other CI	4,000	5,980	6000	9690			2,140	3,360	2,270	3,040	-62%	-69%	6%	-9%
Ireland	210	750	340	1100			80	430	140	600	-59%	-46%	74%	39%
France	6,210	14,020	5090	3580			650	2,050	1,460	4,170	-71%	17%	123%	104%
Germany	320	1,250	70	320			50	140	90	320	23%	-2%	80%	128%
Other	1,690	11,320	1140	6890			600	4,640	770	5,070	-33%	-26%	29%	9%

Mode of departure

	3-year average 2017 to 2019		2019		2021		2022		2023		Change 23/19		Change 23/22	
Scheduled air	29,320	105,450	34360	96120			17,820	61,790	20,350	66,630	-41%	-31%	14%	8%
Scheduled ferry	8,140	20,660	7120	10150			1,820	9,160	2,690	11,520	-62%	14%	48%	26%
Private plane	350	350	430	430			390	390	330	330	-22%	-22%	-15%	-15%
Visiting yachtsmen	190	290	170	320			110	160	70	200	-57%	-37%	-35%	24%
Cruise passengers	0	0	0	0			0	0	0	0	0%		0%	

Duration of stay

	3-year average 2017 to 2019		2019		2021		2022		2023		Change 23/19		Change 23/22	
Day visits	3,650		5,110	0			1,640		2,120		-58%		30%	
1-3 nights	22,040	47,840	28650	57180			11,970	26,460	14,600	31,290	-49%	-45%	22%	18%
4 - 6 nights	9,320	39,320	5930	25370			4,260	19,040	4,750	20,910	-20%	-18%	11%	10%
7 nights	1,670	11,490	1220	8450			1,060	7,390	940	6,610	-23%	-22%	-11%	-11%
8+ nights	1,330	28,090	1160	16010			1,220	18,610	1,030	19,880	-11%	24%	-16%	7%

Table A2: Cumulative - January to March 2017 to 2023

Year to date	3-year average 2017 to 2019		2019		2021	2022		2023		Change 23/19		Change 23/22	
Total passengers	174,280		178,670		7,689	112,390		142,100		-20%		26%	
Total visits	84,080		94,910		1,290	47,790		54,550		-43%		14%	
	Visits	Nights	Visits	Nights	Visits	Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights
Overnight visits	75,930	282,820	84,542	271,443	1,290	43,820	182,560	50,150	212,280	-41%	-22%	14%	16%
Day visits	8,150		10,370		0	3,970		4,410		-58%		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
Total Holiday visits	**38,530**		**44,300**		**0**	**16,900**		**17,520**		**-60%**		**4%**	
- Overnight visits	37,100	119,050	42,520	126,410	0	16,340	60,540	16,440	55,310	-61%	-56%	1%	-9%
- Day visits	1,430		1,780		0	570		1,090		-39%		92%	
Total Business visits	**19,580**		**19,320**		**470**	**12,210**		**13,700**		**-29%**		**12%**	
- Overnight visits	14,740	52,220	14,240	40,360	470	10,320	32,620	12,120	41,640	-15%	3%	17%	28%
- Day visits	4,830		5,080		0	1,890		1,580		-69%		-17%	
Total VFR visits	**17,060**		**18,660**		**820**	**15,550**		**18,370**		**-2%**		**18%**	
- Overnight visits	16,770	89,580	18,060	88,270	820	15,330	83,830	18,190	106,480	1%	21%	19%	27%
- Day visits	290		600		0	220		180		-70%		-17%	
Total Other visits	**8,910**		**12,640**		**0**	**3,130**		**4,960**		**-61%**		**59%**	
- Overnight visits	7,310	21,810	9,730	16,410	0	1,830	5,580	3,400	8,860	-65%	-46%	86%	59%
- Day visits	1,600		2,920		0	1,300		1,560		-46%		20%	
Country of residence													
UK	60,520	215,570	68390	217580		39,530	151,470	42,270	162,390	-38%	-25%	7%	7%
Other CI	9,720	13,640	15460	22900		4,720	9,230	5,430	8,590	-65%	-63%	15%	-7%
Ireland	640	3,760	550	1920		200	880	250	890	-56%	-54%	25%	1%
France	8,550	20,610	6600	6960		1,580	5,450	3,820	10,650	-42%	53%	141%	95%
Germany	420	1,810	140	580		100	360	160	810	14%	38%	59%	124%
Other	4,230	27,430	3770	21510		1,660	15,180	2,640	28,960	-30%	35%	59%	91%
Mode of departure													
Scheduled air	70,270	242,130	82010	245140		42,310	157,400	46,750	183,600	-43%	-25%	10%	17%
Scheduled ferry	12,740	39,470	11490	24650		4,340	23,940	6,780	27,480	-41%	12%	56%	15%
Private plane	810	810	1120	1120		980	980	900	900	-20%	-20%	-8%	-8%
Visiting yachtsmen	270	410	290	530		150	240	130	300	-54%	-44%	-11%	27%
Cruise passengers	0	0	0	0		0	0	0	0	0%		0%	
Duration of stay													
Day visits	8,150		10,370	0		3,970		4,410		-58%		11%	
1-3 nights	48,740	101,970	60300	118690		27,440	60,590	32,400	67,750	-46%	-43%	18%	12%
4 - 6 nights	19,380	84,070	16000	70990		10,160	45,570	11,110	49,430	-31%	-30%	9%	8%
7 nights	3,470	23,990	3940	27400		2,470	17,290	2,300	16,120	-41%	-41%	-7%	-7%
8+ nights	4,330	72,780	4310	54360		3,750	59,110	4,340	78,980	1%	45%	16%	34%

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.