



April 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

April 2023 compared to April 2019

- The total number of **departing passengers**¹ from Jersey was **86,830**, reflecting a recovery to 83% of 2019 levels.
- Of all departing passengers, around half (52%) were **tourism visitors**² who had reached the end of their stay in Jersey (**45,220**) reflecting a lower proportion than that seen in 2019 (64%) and when compared to the three-year average for 2017 to 2019 (60%).
- The number of tourism visitors recovered to 68% of 2019 levels.
- The number of visitors staying for at least one night recovered to three-quarters (76%) of 2019 levels whilst the day trip market continued to show a slower recovery (to 32%).
- The **average length of stay** (4.4 nights) was almost a day longer than in the same period of 2019 (3.7 nights) although it was almost identical to the three-year average recorded for 2017 to 2019 (4.4 nights).
- The number of visitor nights (total number of nights spent by all visitors to Jersey) was **178,940** reflecting a recovery to 90% of 2019 levels.

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 59% of all visits at 26,490 a lower proportion than seen in 2019 when holiday visits accounted for 67% of all visits
 - **business** visits accounted for 8% of visits at 3,580
 - **visits to friends and family** accounted for a quarter (24%) of visits at 10,970, a higher proportion than seen in 2019 (14%)
- The total number of holiday visits recovered to 59% of April 2019 levels and the number visitor nights recovered to two-thirds (66%).
- The total number of business visitors recovered to 85% of 2019 levels and the number of visitor nights recovered to 91%.
- The number of visits to see friends and relatives increased compared to April 2019 (+16%) as did the number of visitors nights (+57%).
- Breaking the visitor numbers down by **travel method**:
 - Three quarters (75%) of visitors travelled via **scheduled air** routes (33,800), recovering to 7% of 2019 levels
 - 22% of visitors travelled via **scheduled ferry** services (10,160) recovering to 53% of 2019 levels; visitor nights for those travelling via scheduled ferry returned to a similar level as seen in April 2019 (-3%)
- Breaking visitor numbers down by **country of residence**:
 - 74% of visitors were from the **UK** (33,420)
 - 7% of visitors were from the other Channel Islands (3,140)
 - 14% of visitors were from **France** (6,450)
- Day trip and shorter stay markets continue to be impacted more significantly than longer stay markets:
 - the day trip market recovered to 33% of 2019 levels
 - visitors staying for 1 to 3 nights recovered to 66%
 - visitors staying for 4 to 6 nights recovered to 80%
 - visitors staying for 7 nights increased by 23%
 - visitors staying for 8 nights + increased by 14%

April 2023 compared to April 2022

- The total number of **departing passengers** increased by 16% compared with the same period of 2022.
 - The number of **departing visitors** increased marginally by 4%.
 - The number of overnight visitors (visitors staying at least one night) was relatively consistent (-1%) whilst the number of day visitors more than doubled (+118%).
 - The **average length of stay** (for those visitors staying for at least one night) increased marginally from 4.0 nights in April 2022 to 4.4 nights in April 2023.
 - The number of holiday visitors increased by 16% compared to the same period of 2022; the number of holiday overnight visits increased by 8% whilst the number of holiday day visitors more than doubled (+158%).
 - The number of business visitors decreased by 27% compared to April 2022.
 - In comparison the number of visitors who came to Jersey to see friends and family increased by almost two-fifths (+38%).
 - The number of visitors from the UK increased marginally by 4% whilst the number of visitors from France increased by 46%; the number of visitors from all other major markets saw declines compared to April 2022.
 - The number of visitors travelling by scheduled air and sea routes both saw marginal increases compared to 2022 (+4% and +3% respectively).
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Table A1: April 2017 to April 2023

April		<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		102,190		104,840		4,894		75,040		86,830		-17%		16%	
Total visits		61,540		66,710		480		43,400		45,220		-32%		4%	
		Visits	Nights	Visits	Nights	Visits		Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights
Topline	Overnight visits	52,600	206,970	53,927	199,833	480		41,500	165,450	41,070	178,940	-24%	-10%	-1%	8%
	Day visits	8,940		12,790		0		1,900		4,150		-68%		118%	
		<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
Purpose of visit	Total Holiday visits	41,270		44,660		0		22,840		26,490		-41%		16%	
	- Overnight visits	36,520	142,330	37,400	136,270	0		21,690	92,560	23,510	89,570	-37%	-34%	8%	-3%
	- Day visits	4,760		7,250		0		1,160		2,990		-59%		158%	
	Total Business visits	4,050		4,190		100		4,880		3,580		-15%		-27%	
	- Overnight visits	3,160	13,140	2,730	10,470	100		4,340	14,670	3,250	9,480	19%	-9%	-25%	-35%
	- Day visits	890		1,450		0		540		320		-78%		-39%	
	Total VFR visits	8,870		9,430		380		7,980		10,970		16%		38%	
	- Overnight visits	8,680	39,480	8,900	39,660	380		7,770	42,770	10,880	62,350	22%	57%	40%	46%
	- Day visits	200		540		0		210		90		-84%		-58%	
Total Other visits	7,350		8,440		0		7,700		4,180		-50%		-46%		
- Overnight visits	4,250	12,030	4,900	13,430	0		7,700	15,470	3,430	17,530	-30%	31%	-56%	13%	
- Day visits	3,100		3,540		0		10		750		-79%		12433%		
Country of residence	UK	41,160	160,630	42610	158750			32,130	129,960	33,420	143,450	-22%	-10%	4%	10%
	Other CI	3,570	5,700	3800	6900			3,380	6,970	3,140	5,000	-17%	-28%	-7%	-28%
	Ireland	970	4,820	720	3620			740	3,330	710	4,110	-1%	14%	-4%	24%
	France	12,070	12,150	14970	11180			4,360	10,890	6,450	11,800	-57%	6%	48%	8%
	Germany	810	3,570	1180	4540			740	2,780	320	2,060	-73%	-55%	-57%	-26%
	Other	2,960	20,090	3450	14850			2,050	11,540	1,180	12,530	-66%	-16%	-42%	9%
	Mode of departure	Scheduled air	43,500	174,100	45860	170170			32,570	122,690	33,800	150,780	-26%	-11%	4%
Scheduled ferry		16,270	30,450	19080	27180			9,830	41,800	10,160	26,230	-47%	-3%	3%	-37%
Private plane		350	350	460	460			430	430	420	420	-7%	-7%	-2%	-2%
Visiting yachtsmen		1,030	2,070	1000	2000			320	530	740	1,500	-26%	-25%	131%	184%
Cruise passengers		390	0	320	0			250	0	90	0	-73%	0%	-66%	0%
Duration of stay	Day visits	8,940		12,780	0			1,900		4,230		-67%		123%	
	1-3 nights	28,560	67,560	30740	73980			23,030	46,910	20,140	46,610	-34%	-37%	-13%	-1%
	4 - 6 nights	17,250	75,660	17270	76010			11,930	55,520	13,740	62,220	-20%	-18%	15%	12%
	7 nights	4,880	33,630	3990	27760			4,400	30,800	4,920	34,460	23%	24%	12%	12%
	8+ nights	1,920	30,120	1920	22090			2,140	32,230	2,180	35,650	14%	61%	2%	11%

Table A2: Cumulative - January to April 2017 to 2023

Year to date		3-year average 2017 to 2019		2019		2021		2022		2023		Change 23/19		Change 23/22	
Total passengers		276,460		283,510		12,583		187,430		229,410		-19%		22%	
Total visits		145,620		161,630		1,770		91,190		99,770		-38%		9%	
		Visits	Nights	Visits	Nights	Visits		Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights
	Overnight visits	128,530	489,790	138,469	471,276	1,770		85,310	348,020	91,220	391,220	-34%	-17%	7%	12%
	Day visits	17,090		23,160		0		5,870		8,550		-63%		46%	
		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	79,800		88,960		0		39,750		44,020		-51%		11%	
	- Overnight visits	73,610	261,380	79,930	262,680	0		38,020	153,090	39,940	144,890	-50%	-45%	5%	-5%
	- Day visits	6,190		9,030		0		1,720		4,070		-55%		136%	
	Total Business visits	23,620		23,500		570		17,080		17,280		-26%		1%	
	- Overnight visits	17,900	65,360	16,970	50,830	570		14,660	47,280	15,380	51,120	-9%	1%	5%	8%
	- Day visits	5,720		6,530		0		2,420		1,900		-71%		-22%	
	Total VFR visits	25,940		28,090		1,200		23,530		29,340		4%		25%	
	- Overnight visits	25,450	129,060	26,950	127,920	1,200		23,110	126,590	29,080	168,820	8%	32%	26%	33%
	- Day visits	490		1,140		0		420		270		-76%		-37%	
	Total Other visits	16,260		21,080		0		10,830		9,140		-57%		-16%	
	- Overnight visits	11,560	33,840	14,620	29,840	0		9,520	21,050	6,820	26,390	-53%	-12%	-28%	25%
	- Day visits	4,700		6,460		0		1,300		2,310		-64%		77%	
Country of residence	UK	101,680	376,210	110990	376330			71,660	281,420	75,680	305,840	-32%	-19%	6%	9%
	Other CI	13,290	19,340	19260	29800			8,100	16,190	8,570	13,580	-56%	-54%	6%	-16%
	Ireland	1,610	8,580	1270	5540			930	4,210	960	5,000	-25%	-10%	2%	19%
	France	20,620	32,760	21560	18130			5,950	16,340	10,270	22,440	-52%	24%	73%	37%
	Germany	1,240	5,390	1320	5120			840	3,130	480	2,860	-64%	-44%	-43%	-9%
	Other	7,200	47,520	7220	36350			3,700	26,720	3,820	41,490	-47%	14%	3%	55%
Mode of departure	Scheduled air	113,770	416,230	127870	415310			74,880	280,100	80,550	334,380	-37%	-19%	8%	19%
	Scheduled ferry	29,010	69,920	30570	51830			14,170	65,740	16,940	53,720	-45%	4%	20%	-18%
	Private plane	1,160	1,160	1580	1580			1,410	1,410	1,320	1,320	-16%	-16%	-6%	-6%
	Visiting yachtsmen	1,290	2,480	1290	2530			470	770	880	1,800	-32%	-29%	86%	135%
	Cruise passengers	390	0	320	0			250	0	90	0	0%		0%	
Duration of stay	Day visits	17,090		23,160	0			5,870		8,640		-63%		47%	
	1-3 nights	77,310	169,540	91040	192670			50,470	107,500	52,540	114,360	-42%	-41%	4%	6%
	4 - 6 nights	36,630	159,730	33280	147000			22,080	101,090	24,850	111,650	-25%	-24%	13%	10%
	7 nights	8,350	57,620	7930	55160			6,870	48,090	7,230	50,580	-9%	-8%	5%	5%
	8+ nights	6,250	102,910	6220	76440			5,890	91,350	6,520	114,630	5%	50%	11%	25%

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.