



## May 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

#### May 2023 compared to May 2019

- The total number of **departing passengers**<sup>1</sup> (**97,910**) recovered to **80%** of the level seen in May 2019.
- Of all departing passengers, 61% were **tourism visitors**<sup>2</sup> who had reached the end of their stay in Jersey (**60,120**), reflecting a recovery to 69% of 2019 levels.
- The number of visitors staying for at least one night recovered to three-quarters (76%) whilst the day trip market recovered to 43%.
- The **average length of stay** (4.2 nights) was similar to in May 2019 (4.1 nights) and almost identical to the average recorded for May 2017 to 2019 (4.2).
- The number of visitor nights (total number of nights spent by all visitors to Jersey) was **217,020** reflecting a recovery to 77% of 2019 levels.
- Breaking the visitor numbers down by main **purpose of visit**:
  - **holiday** visits accounted for 68% of all visits at **40,810**, a similar proportion to that seen in May 2019 (66%)
  - **business** visits accounted for 9% of visits at **5,570**

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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.

- **visits to see friends and family** accounted for 16% of visits at **9,670**
  - The number of holiday day trips showed a stronger recovery (86% recovery compared to May 2019) than the number of overnight holiday visits (70% recovery).
  - The total number of business visits increased compared to the same period of 2019 (+6%) as did the number of visitor nights (+11%).
  - Both the number of visits to see friends and relatives and the number of visitor nights for this visitor type increased in the latest month (+13% and +14% respectively compared to May 2019)
  - Breaking the visitor numbers down by **travel method**:
    - 63% of visitors travelled by scheduled air services (38,020)
    - A third (33%) of visitors travelled by scheduled ferry services (19,610)
    - The number of visitors travelling via scheduled air and scheduled ferry services showed similar recoveries (70% and 68% respectively) in the latest month
    - Whilst the number of nights spent by scheduled air visitors recovered to 70% of 2019 levels, the number of nights spent by ferry visitors showed a marginal increase (+2%)
  - Breaking visitor numbers down by **country of residence**:
    - 61% of visitors were from the **UK** (36,740)
    - 6% of visitors were from the other Channel Islands (3,380)
    - 21% of visitors were from **France** (12,650)
  - Whilst the day trip market is yet to recover to half of what it was in 2019 (44% recovery compared to May 2019), the longer stay market (8+ nights) has increased by a tenth (10%).
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## May 2023 compared to May 2022

- The total number of **departing passengers** increased by 15% compared with the same period of 2022
  - The number of **departing visitors** increased by 13%.
  - Whilst the number of overnight visitors (visitors staying at least one night) was similar to in the previous year (+3%) the number of day visitors almost tripled (+198%) increasing from 2,630 in May 2022 to 7,840 in May 2023.
  - The total number of visitor nights was similar (-1%) to in May 2022.
  - The **average length of stay** (for those visitors staying for at least one night) at 4.2 was similar to in May 2022 (4.1).
  - The number of holiday visitors increased by 20%; the number of holiday overnight visits increased by 6% whilst the number of holiday day visitors more than doubled (+244%).
  - The number of business visitors decreased marginally by 6%.
  - The number of visitors who came to Jersey to see friends and family was similar to in May 2022 (+1%)
  - The number of day visits made for each purpose (holiday, business, visiting friends and relatives and other purposes) increased significantly in the latest month.
  - The number of visitors from the UK was similar to the previous year (-2%)
  - In comparison, the number of visitors from France more than doubled (+120%)
  - The number of visitors travelling via scheduled air was almost identical to in the previous year (less than 1% difference) whilst the number of visitors departing via scheduled sea services increased by almost a half (+47%).
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**Table A1: May 2017 to May 2023**

May		<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		120,780		121,660		16,014		84,790		97,910		-20%		15%		
Total visits		79,100		86,620		9,310		53,240		60,120		-31%		13%		
		Visits	Nights	Visits	Nights	Visits	Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights
Topline	Overnight visits	63,920	275,330	68,375	282,862	9,230	50,600	220,090	52,280	217,020	-24%	-23%	3%	-1%		
	Day visits	15,180		18,240		80	2,630		7,840		-57%		198%			
		<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	Visits	Nights
Purpose of visit	<b>Total Holiday visits</b>	<b>56,040</b>		<b>56,820</b>		<b>3,330</b>	<b>34,110</b>		<b>40,810</b>		<b>-28%</b>		<b>20%</b>			
	- Overnight visits	46,710	208,830	49,070	215,450	3,300	32,160	146,100	34,130	143,810	-30%	-33%	6%	-2%		
	- Day visits	9,330		7,760		30	1,940		6,690		-14%		244%			
	<b>Total Business visits</b>	<b>6,800</b>		<b>5,270</b>		<b>1,030</b>	<b>5,920</b>		<b>5,570</b>		<b>6%</b>		<b>-6%</b>			
	- Overnight visits	5,300	16,780	4,080	13,210	980	5,430	13,500	4,740	14,670	16%	11%	-13%	9%		
	- Day visits	1,500		1,190		50	490		840		-30%		70%			
	<b>Total VFR visits</b>	<b>7,800</b>		<b>8,550</b>		<b>4,550</b>	<b>9,590</b>		<b>9,670</b>		<b>13%</b>		<b>1%</b>			
	- Overnight visits	7,670	36,570	8,400	39,580	4,550	9,470	46,930	9,470	45,100	13%	14%	0%	-4%		
	- Day visits	130		150		0	120		200		34%		63%			
	<b>Total Other visits</b>	<b>8,460</b>		<b>15,980</b>		<b>400</b>	<b>3,620</b>		<b>4,060</b>		<b>-75%</b>		<b>12%</b>			
- Overnight visits	4,230	13,140	6,830	14,630	400	3,540	13,570	3,940	13,440	-42%	-8%	11%	-1%			
- Day visits	4,220		9,150		0	80		120		-99%		49%				
Country of residence	UK	44,920	192,830	48800	209620		37,340	164,670	36,740	157,760	-25%	-25%	-2%	-4%		
	Other CI	5,490	8,590	5960	10490		3,770	7,930	3,380	6,360	-43%	-39%	-10%	-20%		
	Ireland	630	2,840	890	3590		700	2,720	750	4,010	-16%	12%	8%	48%		
	France	17,870	18,590	20220	18020		5,740	13,440	12,650	19,800	-37%	10%	120%	47%		
	Germany	3,530	18,900	3360	17830		2,820	14,910	1,760	8,700	-48%	-51%	-38%	-42%		
	Other	6,660	33,580	7390	23320		2,880	16,430	4,850	20,410	-34%	-12%	69%	24%		
Mode of departure	Scheduled air	47,750	205,890	54240	227490		38,210	163,550	38,020	162,100	-30%	-29%	0%	-1%		
	Scheduled ferry	27,950	64,650	28870	50110		13,300	54,650	19,610	50,930	-32%	2%	47%	-7%		
	Private plane	460	460	560	560		600	600	510	510	-8%	-8%	-15%	-15%		
	Visiting yachtsmen	2,100	4,330	2100	4700		750	1,290	1,750	3,480	-17%	-26%	133%	169%		
	Cruise passengers	840	0	860	0		380	0	230	0	-73%	0%	-40%	0%		
Duration of stay	Day visits	15,180		18,240	0		2,640		8,070		-56%		206%			
	1-3 nights	27,890	65,610	30940	72260		22,340	50,360	25,040	55,870	-19%	-23%	12%	11%		
	4 - 6 nights	22,710	101,910	24030	107630		18,390	83,710	17,740	79,760	-26%	-26%	-4%	-5%		
	7 nights	9,900	67,980	11020	75780		7,290	51,030	6,650	46,560	-40%	-39%	-9%	-9%		
	8+ nights	3,420	39,820	2390	27200		2,590	34,980	2,620	34,840	10%	28%	1%	0%		

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

Year to date		<u>3-year average 2017 to 2019</u>		2019		2021		2022		2023		Change 23/19		Change 23/22	
Total passengers		397,240		405,170		28,597		272,220		327,320		-19%		20%	
Total visits		224,720		248,240		11,080		144,430		159,890		-36%		11%	
		Visits	Nights	Visits	Nights	Visits		Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights
	Overnight visits	192,460	765,120	206,844	754,138	11,000		135,920	568,110	143,490	608,240	-31%	-19%	6%	7%
	Day visits	32,270		41,400		80		8,510		16,390		-60%		93%	
		<u>3-year average 2017 to 2019</u>		2019		2021		2022		2023		Change 23/19		Change 23/22	
		Visits	Nights	Visits	Nights	Visits		Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights
	<b>Total Holiday visits</b>	<b>135,840</b>		<b>145,780</b>		<b>3,330</b>		<b>73,850</b>		<b>84,830</b>		<b>-42%</b>		<b>15%</b>	
	- Overnight visits	120,330	470,220	128,990	478,130	3,300		70,190	299,190	74,070	288,700	-43%	-40%	6%	-4%
	- Day visits	15,520		16,790		30		3,670		10,760		-36%		194%	
	<b>Total Business visits</b>	<b>30,420</b>		<b>28,770</b>		<b>1,600</b>		<b>23,010</b>		<b>22,850</b>		<b>-21%</b>		<b>-1%</b>	
	- Overnight visits	23,210	82,150	21,040	64,050	1,550		20,090	60,780	20,110	65,790	-4%	3%	0%	8%
	- Day visits	7,220		7,720		50		2,910		2,740		-65%		-6%	
	<b>Total VFR visits</b>	<b>33,740</b>		<b>36,640</b>		<b>5,750</b>		<b>33,120</b>		<b>39,010</b>		<b>6%</b>		<b>18%</b>	
	- Overnight visits	33,120	165,630	35,360	167,500	5,750		32,570	173,520	38,550	213,920	9%	28%	18%	23%
	- Day visits	610		1,280		0		550		470		-64%		-15%	
	<b>Total Other visits</b>	<b>24,720</b>		<b>37,060</b>		<b>400</b>		<b>14,450</b>		<b>13,200</b>		<b>-64%</b>		<b>-9%</b>	
- Overnight visits	15,800	46,980	21,450	44,470	400		13,070	34,610	10,760	39,830	-50%	-10%	-18%	15%	
- Day visits	8,920		15,600		0		1,380		2,430		-84%		76%		
Country of residence	UK	146,600	569,040	159,790	585,940			109,000	446,090	112,420	463,600	-30%	-21%	3%	4%
	Other CI	18,780	27,930	25,220	40,290			11,870	24,120	11,940	19,940	-53%	-51%	1%	-17%
	Ireland	2,230	11,420	2,160	9,130			1,630	6,930	1,710	9,010	-21%	-1%	5%	30%
	France	38,490	51,350	41,780	36,160			11,680	29,780	22,910	42,240	-45%	17%	96%	42%
	Germany	4,770	24,290	4,680	22,950			3,660	18,050	2,240	11,560	-52%	-50%	-39%	-36%
	Other	13,860	81,090	14,610	59,670			6,580	43,140	8,670	61,900	-41%	4%	32%	43%
Mode of departure	Scheduled air	161,520	622,120	182,110	642,800			113,090	443,640	118,570	496,480	-35%	-23%	5%	12%
	Scheduled ferry	56,960	134,570	59,430	101,940			27,470	120,390	36,550	104,650	-38%	3%	33%	-13%
	Private plane	1,620	1,620	2,140	2,140			2,010	2,010	1,830	1,830	-14%	-14%	-9%	-9%
	Visiting yachtsmen	3,400	6,810	3,390	7,240			1,220	2,060	2,630	5,280	-22%	-27%	115%	157%
	Cruise passengers	1,230	0	1,170	0			630	0	310	0	0%		0%	
Duration of stay	Day visits	32,270		41,400	0			8,510		16,710		-60%		96%	
	1-3 nights	105,190	235,150	121,980	264,930			72,810	157,860	77,580	170,230	-36%	-36%	7%	8%
	4 - 6 nights	59,340	261,640	57,310	254,630			40,470	184,800	42,590	191,410	-26%	-25%	5%	4%
	7 nights	18,250	125,600	18,950	130,940			14,160	99,120	13,880	97,130	-27%	-26%	-2%	-2%
	8+ nights	9,670	142,730	8,610	103,640			8,480	126,330	9,140	149,470	6%	44%	8%	18%

## 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.