



June 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

June 2023 compared to June 2019

- The total number of **departing passengers¹ (104,360)** recovered to **82%** of the level seen in June 2019.
- The number of tourism visitors reaching the end of their stay in Jersey (**64,510**) recovered to **73%** of the level recorded in June 2019.
- The number of visitors staying for at least one night recovered to three-quarters (77%) whilst the day trip market recovered to 54%.
- The **average length of stay** (4.7 nights) was very similar to in June 2019 (4.6) and almost identical to the 3-year average recorded for 2017 to 2019 (4.7).
- The number of visitor nights (total number of nights spent by all visitors to Jersey) was **258,640** reflecting a recovery to 78% of 2019 levels.
- Breaking the visitor numbers down by main **purpose of visit**:
 - **holiday** visits accounted for two-thirds 67% of all visits at **43,500**, a similar proportion to that seen in May 2019 (69%)
 - **business** visits accounted for 9% of visits at **6,040**
 - **visits to see friends and family** accounted for 16% of visits at **9,990**

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.

- The number of holiday day trips showed a strong recovery in the latest month at 93% of the level seen in June 2019; this compares to a recovery of 69% for holiday overnight visits.
 - The majority (88%) of people visiting Jersey for a day trip came from France, equating to around 7,750 visitors.
 - The total number of business visits was similar to in the same period of 2019 (-4%); whilst business day visits showed a recovery to 31%, business overnight visits increased by 25%.
 - The total number of visits to see friends and relatives was almost identical to in June 2019 (-1%).
 - Excluding for holiday visits, the number of visitors nights was up for all other visit purposes (business, visiting friends and relatives and other purposes) when compared to June 2019; the number of visitor nights for holiday visits recovered to 69%.
 - Breaking the visitor numbers down by **travel method**:
 - 69% of visitors travelled by scheduled air services (44,200)
 - Around a quarter (27%) of visitors travelled by scheduled ferry services (17,620)
 - The number of visitors travelling via scheduled air recovered to 75% whilst the number of visitors travelling via scheduled sea services recovered to 68%
 - Whilst the number of nights spent by scheduled air visitors recovered to 76% of 2019 levels, the number of nights spent by ferry visitors recovered to 91%
 - Breaking visitor numbers down by **country of residence**:
 - 68% of visitors were from the **UK** (44,100)
 - 8% of visitors were from the other Channel Islands (4,990)
 - 16% of visitors were from **France** (10,290)
 - 3% of visitors were from Germany (1,760)
 - UK visits recovered to 78% of 2019 levels, other Channel Islands and France recovered to around two thirds of 2019 levels, Germany recovered to 45% of 2019 levels.
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June 2023 compared to June 2022

- The total number of **departing passengers** increased by 17% compared with the same period of 2022.
 - The number of **departing visitors** increased by almost a quarter (23%).
 - The number of overnight visitors (visitors staying at least one night) increased by 15% whilst the number of day visitors more than doubled (+119%).
 - The number of French day trip visitors (travelling on scheduled air and ferry services) increased from 1,480 in June 2022 to 7,750 in June 2023 (+424%).
 - The **average length of stay** (for those visitors staying for at least one night) fell from 5.0 nights to 4.7 nights in the latest month; the number of visitor nights increased marginally by 7% due to the increased number of visitors.
 - The number of holiday visitors increased by 23%; the number of holiday overnight visits increased by 11% whilst the number of holiday day visitors almost tripled (+194%).
 - The number of business visitors increased by around a half (+48%) compared to June 2022, returning to levels seen pre-pandemic.
 - The number of visitors who came to Jersey to see friends and family was similar to in May 2022 (+2%).
 - Excluding for business visits, the number of day visits made for each purpose (holiday, visiting friends and relatives and other purposes) increased significantly in the latest month; in comparison, the number of business day visits fell by 13%.
 - The number of visits from all major markets excluding Germany increased on an annual basis with the number of visitors from France more than doubling on an annual basis (+162%). In comparison, German visits have decreased by 15% compared to last year.
 - The number of visitors travelling via scheduled air increased by 14% when compared with the same period of 2022 whilst the number of visitors travelling by scheduled ferry services increased by 50%.
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Table A1: June 2017 to June 2023

| June | | <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 | | 125,710 | | 126,590 | | 34,746 | | 89,210 | | 104,360 | | -18% | | 17% | |
| Total visits | | 89,480 | | 88,260 | | 26,940 | | 52,290 | | 64,510 | | -27% | | 23% | |
| | | Visits | Nights | Visits | Nights | Visits | Nights | Visits | Nights | Visits | Nights | Visits | Nights | Visits | Nights |
| Topline | Overnight visits | 70,770 | 326,090 | 71,574 | 330,345 | 26,580 | | 48,150 | 242,850 | 55,430 | 258,640 | -23% | -22% | 15% | 7% |
| | Day visits | 18,710 | | 16,690 | | 360 | | 4,140 | | 9,080 | | -46% | | 119% | |
| | | <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 | Nights | Visits | Nights | Visits | Nights | Visits | Nights | Visits | Nights |
| Purpose of visit | Total Holiday visits | 61,190 | | 60,810 | | 14,790 | | 35,290 | | 43,500 | | -28% | | 23% | |
| | - Overnight visits | 51,750 | 254,090 | 53,610 | 263,480 | 14,690 | | 33,010 | 170,970 | 36,790 | 181,130 | -31% | -31% | 11% | 6% |
| | - Day visits | 9,440 | | 7,200 | | 100 | | 2,280 | | 6,710 | | -7% | | 194% | |
| | Total Business visits | 6,400 | | 6,280 | | 2,620 | | 4,090 | | 6,040 | | -4% | | 48% | |
| | - Overnight visits | 4,590 | 12,440 | 4,340 | 10,630 | 2,490 | | 3,390 | 10,080 | 5,430 | 15,060 | 25% | 42% | 60% | 49% |
| | - Day visits | 1,810 | | 1,940 | | 130 | | 700 | | 600 | | -69% | | -13% | |
| | Total VFR visits | 11,010 | | 10,060 | | 7,830 | | 9,830 | | 9,990 | | -1% | | 2% | |
| | - Overnight visits | 10,920 | 53,150 | 9,950 | 50,160 | 7,750 | | 9,790 | 53,920 | 9,850 | 52,990 | -1% | 6% | 1% | -2% |
| | - Day visits | 90 | | 110 | | 80 | | 40 | | 140 | | 30% | | 309% | |
| | Total Other visits | 10,880 | | 11,110 | | 1,700 | | 3,080 | | 4,980 | | -55% | | 62% | |
| - Overnight visits | 3,520 | 6,410 | 3,670 | 6,080 | 1,650 | | 1,960 | 7,880 | 3,350 | 9,460 | -9% | 56% | 71% | 20% | |
| - Day visits | 7,370 | | 7,440 | | 50 | | 1,120 | | 1,630 | | -78% | | 45% | | |
| Country of residence | UK | 51,620 | 257,570 | 56,420 | 264,860 | | | 40,130 | 202,490 | 44,100 | 209,240 | -22% | -21% | 10% | 3% |
| | Other CI | 5,610 | 7,620 | 7,100 | 5,750 | | | 3,240 | 7,000 | 4,990 | 11,000 | -30% | 91% | 54% | 57% |
| | Ireland | 970 | 4,610 | 1,030 | 5,180 | | | 660 | 4,190 | 1,030 | 5,480 | 0% | 6% | 57% | 31% |
| | France | 18,780 | 13,910 | 15,210 | 11,070 | | | 3,930 | 7,860 | 10,290 | 6,640 | -32% | -40% | 162% | -15% |
| | Germany | 2,940 | 15,840 | 3,890 | 21,690 | | | 2,080 | 8,480 | 1,760 | 10,840 | -55% | -50% | -15% | 28% |
| | Other | 9,560 | 26,540 | 4,630 | 21,800 | | | 2,240 | 12,830 | 2,340 | 15,450 | -49% | -29% | 4% | 20% |
| Mode of departure | Scheduled air | 57,670 | 265,300 | 59,010 | 269,380 | | | 38,870 | 190,360 | 44,200 | 205,610 | -25% | -24% | 14% | 8% |
| | Scheduled ferry | 28,580 | 53,990 | 25,760 | 52,940 | | | 11,720 | 49,980 | 17,620 | 48,040 | -32% | -9% | 50% | -4% |
| | Private plane | 450 | 450 | 560 | 560 | | | 600 | 600 | 570 | 570 | 3% | 3% | -5% | -5% |
| | Visiting yachtsmen | 2,700 | 6,340 | 2,930 | 7,470 | | | 970 | 1,910 | 2,120 | 4,420 | -28% | -41% | 119% | 131% |
| | Cruise passengers | 90 | 0 | 0 | 0 | | | 130 | 0 | 0 | 0 | | | -100% | |
| Duration of stay | Day visits | 18,710 | | 16,690 | 0 | | | 4,140 | | 9,080 | | -46% | | 119% | |
| | 1-3 nights | 28,190 | 65,680 | 27,870 | 64,700 | | | 17,600 | 42,160 | 25,310 | 56,020 | -9% | -13% | 44% | 33% |
| | 4 - 6 nights | 23,430 | 108,680 | 23,510 | 106,460 | | | 16,430 | 76,490 | 14,320 | 66,550 | -39% | -37% | -13% | -13% |
| | 7 nights | 15,230 | 104,820 | 15,810 | 108,910 | | | 10,140 | 70,970 | 12,530 | 87,700 | -21% | -19% | 24% | 24% |
| | 8+ nights | 3,940 | 46,900 | 4,390 | 50,270 | | | 3,980 | 53,220 | 3,270 | 48,390 | -26% | -4% | -18% | -9% |

Table A2: Cumulative - January to June 2017 to 2023

| Year to date | | 3-year average 2017 to 2019 | | 2019 | | 2021 | | 2022 | | 2023 | | Change 23/19 | | Change 23/22 | |
|----------------------|------------------------------|-----------------------------|-----------|----------------|-----------|---------------|--------|----------------|---------|----------------|---------|--------------|--------|--------------|--------|
| Total passengers | | 522,940 | | 531,760 | | 63,340 | | 361,430 | | 431,680 | | -19% | | 19% | |
| Total visits | | 314,210 | | 336,500 | | 38,020 | | 196,710 | | 224,390 | | -33% | | 14% | |
| | | Visits | Nights | Visits | Nights | Visits | | Visits | Nights | Visits | Nights | Visits | Nights | Visits | Nights |
| | Overnight visits | 263,230 | 1,091,200 | 278,418 | 1,084,483 | 37,580 | | 184,060 | 810,950 | 198,920 | 866,880 | -29% | -20% | 8% | 7% |
| | Day visits | 50,980 | | 58,080 | | 440 | | 12,650 | | 25,470 | | -56% | | 101% | |
| | | 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 | 197,030 | | 206,590 | | 18,120 | | 109,140 | | 128,330 | | -38% | | 18% | |
| | - Overnight visits | 172,080 | 724,310 | 182,600 | 741,610 | 17,990 | | 103,190 | 470,160 | 110,850 | 469,830 | -39% | -37% | 7% | 0% |
| | - Day visits | 24,950 | | 23,990 | | 130 | | 5,950 | | 17,470 | | -27% | | 194% | |
| | Total Business visits | 36,830 | | 35,050 | | 4,220 | | 27,100 | | 28,890 | | -18% | | 7% | |
| | - Overnight visits | 27,800 | 94,590 | 25,390 | 74,670 | 4,040 | | 23,480 | 70,860 | 25,550 | 80,850 | 1% | 8% | 9% | 14% |
| | - Day visits | 9,030 | | 9,660 | | 180 | | 3,610 | | 3,340 | | -65% | | -8% | |
| | Total VFR visits | 44,750 | | 46,700 | | 13,580 | | 42,950 | | 49,010 | | 5% | | 14% | |
| | - Overnight visits | 44,050 | 218,770 | 45,310 | 217,660 | 13,500 | | 42,370 | 227,440 | 48,400 | 266,910 | 7% | 23% | 14% | 17% |
| | - Day visits | 700 | | 1,390 | | 80 | | 580 | | 610 | | -56% | | 5% | |
| | Total Other visits | 35,600 | | 48,160 | | 2,100 | | 17,530 | | 18,170 | | -62% | | 4% | |
| - Overnight visits | 19,310 | 53,390 | 25,120 | 50,540 | 2,050 | | 15,020 | 42,500 | 14,110 | 49,290 | -44% | -2% | -6% | 16% | |
| - Day visits | 16,290 | | 23,040 | | 50 | | 2,510 | | 4,060 | | -82% | | 62% | | |
| Country of residence | UK | 198,210 | 826,610 | 216210 | 850800 | | | 149,140 | 648,580 | 156,520 | 672,830 | -28% | -21% | 5% | 4% |
| | Other CI | 24,390 | 35,550 | 32320 | 46030 | | | 15,110 | 31,120 | 16,930 | 30,940 | -48% | -33% | 12% | -1% |
| | Ireland | 3,200 | 16,020 | 3190 | 14320 | | | 2,290 | 11,120 | 2,740 | 14,490 | -14% | 1% | 20% | 30% |
| | France | 57,270 | 65,260 | 56990 | 47220 | | | 15,620 | 37,640 | 33,210 | 48,890 | -42% | 4% | 113% | 30% |
| | Germany | 7,710 | 40,130 | 8570 | 44640 | | | 5,740 | 26,530 | 4,000 | 22,400 | -53% | -50% | -30% | -16% |
| | Other | 23,420 | 107,640 | 19230 | 81470 | | | 8,820 | 55,970 | 11,010 | 77,340 | -43% | -5% | 25% | 38% |
| Mode of departure | Scheduled air | 219,180 | 887,420 | 241120 | 912180 | | | 151,960 | 634,000 | 162,770 | 702,090 | -32% | -23% | 7% | 11% |
| | Scheduled ferry | 85,530 | 188,560 | 85190 | 154880 | | | 39,190 | 170,370 | 54,170 | 152,690 | -36% | -1% | 38% | -10% |
| | Private plane | 2,070 | 2,070 | 2700 | 2700 | | | 2,610 | 2,610 | 2,410 | 2,410 | -11% | -11% | -8% | -8% |
| | Visiting yachtsmen | 6,100 | 13,150 | 6320 | 14700 | | | 2,190 | 3,970 | 4,740 | 9,700 | -25% | -34% | 117% | 144% |
| | Cruise passengers | 1,320 | 0 | 1170 | 0 | | | 760 | 0 | 310 | 0 | 0% | | 0% | |
| Duration of stay | Day visits | 50,980 | | 58,080 | 0 | | | 12,650 | | 25,790 | | -56% | | 104% | |
| | 1-3 nights | 133,380 | 300,830 | 149850 | 329630 | | | 90,410 | 200,020 | 102,890 | 226,250 | -31% | -31% | 14% | 13% |
| | 4 - 6 nights | 82,770 | 370,320 | 80810 | 361090 | | | 56,900 | 261,300 | 56,900 | 257,950 | -30% | -29% | 0% | -1% |
| | 7 nights | 33,480 | 230,430 | 34760 | 239850 | | | 24,300 | 170,090 | 26,400 | 184,830 | -24% | -23% | 9% | 9% |
| | 8+ nights | 13,610 | 189,630 | 13000 | 153910 | | | 12,460 | 179,550 | 12,410 | 197,860 | -5% | 29% | 0% | 10% |

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.