

## July 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

#### July 2023 compared to July 2019

- The total number of **departing passengers**<sup>1</sup> (**123,820**) recovered to **86%** of the level seen in July 2019.
- The number of tourism visitors reaching the end of their stay in Jersey (**74,300**) recovered to **76%** reflecting the strongest monthly recovery recorded so far in 2023.
- The number of visitors staying for at least one night recovered to 83% of 2019 levels whilst the day trip market recovered to 31%. The French day trip ID exception scheme was brought in on the 22<sup>nd</sup> April 2023 and since then we've seen a strong recovery in day trips each month. July reflects the first month since April that the recovery in the day trip market has slowed again.
- The **average length of stay** (5.1 nights) for those visitors staying at least one night was higher than in July 2019 (4.8).
- The number of visitor nights (total number of nights spent by all visitors to Jersey) was **356,670** reflecting a recovery to 87% of July 2019 levels.
- Breaking the visitor numbers down by main **purpose of visit**:
  - **holiday** visits accounted for two-thirds 70% of all visits at **51,900**, a lower proportion to that seen in July 2019 (75%)
  - **business** visits accounted for 7% of visits at **5,400**, a similar proportion to 2019 (**5%**)

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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.

- **visits to see friends and family** accounted for 21% of visits at **15,650, a larger proportion than in July 2019 (14%)**
  - The number of holiday visitors remained at 71% of July 2019 levels whilst the number of visitor nights was at 79% due to the increased average length of stay.
  - The number of holiday day trips in July did not demonstrate the same strong recovery recorded over the previous 3 months; in July the number of holiday day trips was at 35% of the level seen in July 2019.
  - Of the holiday day trip market, almost 6 out of 10 (59%) visitors were from France equating to around 1,790 visitors (significantly less than observed a month earlier in June when the number was circa 5,900).
  - The total number of business visits (5,400) increased by 11% compared to July 2019 and the number of business nights by more than a quarter (28%).
  - The total number of visits to see friends and relatives (15,650) increased by 15% and the number of nights increased by 23%.
  - Breaking the visitor numbers down by **travel method**:
    - 69% of visitors travelled by scheduled air services (53,430)
    - Around a quarter (23%) of visitors travelled by scheduled ferry services (17,290)
    - The number of visitors travelling via scheduled air recovered to 86% whilst the number of visitors travelling via scheduled sea services recovered to 59%.
    - Whilst the number of visitors travelling by scheduled sea services remains significantly lower than 2019 levels, the number of visitor nights for this visitor type has been seen to increase by 10%.
  - Breaking visitor numbers down by **country of residence**:
    - the UK, Irish and German markets have shown a strong recovery in the latest month, with visitor numbers recorded at between 95% and 100% of July 2019 levels.
    - The Channel Islands, France and 'Other Countries' markets have not shown the same level of recovery, with visitor numbers recorded at 63%, 31% and 47% of July 2019 levels respectively.
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## July 2023 compared to July 2022

- The total number of **departing passengers** increased by 9% compared with the same period of 2022.
  - The number of **departing visitors** increased by almost a quarter (15%).
  - The number of overnight visitors (visitors staying at least one night) increased by 15% whilst the number of day visitors increased by 11%.
  - The **average length of stay** (for those visitors staying for at least one night) fell from 5.5 nights to 5.1 nights in the latest month; the number of visitor nights increased marginally by 6% due to the increased number of visitors.
  - The number of holiday visitors increased by 9%; the number of holiday overnight visits increased by 10% however the number of holiday day visitors decreased marginally by 2%.
  - The number of business visitors increased by more than a third (37%) compared to July 2022; whilst the number of overnight business visitors was up by 29% the number of business visitors making a day trip doubled (+108%).
  - The number of visitors who came to Jersey to see friends and family was also up by around a third (30%) compared July 2022 with overnight visits up by 29% and day visits almost doubling (+94%).
  - The number of visits from all major markets excluding Ireland increased on an annual basis; visits from Germany showed a particularly large increase (+58%).
  - The number of visitors travelling via scheduled air and scheduled sea showed similar increases compared to July 2022 (+19% and 17% respectively).
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**Table A1: July 2017 to July 2023**

July		3-year average 2017 to 2019		2019		2021		2022		2023		Change 23/19		Change 23/22	
Total passengers		142,070		143,200		50,887		113,140		123,820		-14%		9%	
Total visits		96,520		97,340		39,210		64,780		74,300		-24%		15%	
		Visits	Nights	Visits	Nights	Visits		Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights
Topline	Overnight visits	82,950	425,670	84,393	408,090	37,920		61,110	336,060	70,230	356,670	-17%	-13%	15%	6%
	Day visits	13,570		12,950		1,290		3,670		4,080		-69%		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
Purpose of visit	<b>Total Holiday visits</b>	<b>73,610</b>		<b>72,880</b>		<b>25,990</b>		<b>47,530</b>		<b>51,900</b>		<b>-29%</b>		<b>9%</b>	
	Overnight visits	62,680	322,380	64,270	317,600	25,000		44,440	247,680	48,870	252,330	-24%	-21%	10%	2%
	Day visits	10,920		8,610		990		3,090		3,030		-65%		-2%	
	<b>Total Business visits</b>	<b>6,100</b>		<b>4,890</b>		<b>1,520</b>		<b>3,950</b>		<b>5,400</b>		<b>11%</b>		<b>37%</b>	
	Overnight visits	4,820	20,060	3,870	10,750	1,370		3,560	13,240	4,590	13,740	19%	28%	29%	4%
	Day visits	1,270		1,020		150		390		820		-20%		108%	
	<b>Total VFR visits</b>	<b>12,400</b>		<b>13,590</b>		<b>10,000</b>		<b>12,070</b>		<b>15,650</b>		<b>15%</b>		<b>30%</b>	
	Overnight visits	12,310	66,230	13,390	68,040	9,900		11,990	71,400	15,500	83,650	16%	23%	29%	17%
	Day visits	90		200		100		80		150		-25%		94%	
	<b>Total Other visits</b>	<b>4,420</b>		<b>5,990</b>		<b>1,700</b>		<b>1,240</b>		<b>1,350</b>		<b>-77%</b>		<b>9%</b>	
Overnight visits	3,140	17,010	2,870	11,690	1,650		1,120	3,740	1,260	6,940	-56%	-41%	12%	86%	
Day visits	1,280		3,120		50		110		90		-97%		-25%		
Country of residence	Other CI	59,320	315,360	58420	304150			48,610	271,440	55,740	278,070	-5%	-9%	15%	2%
	Canada	4,910	7,680	4320	6100			2,520	6,160	2,720	5,780	-37%	-5%	8%	-6%
	France	1,470	8,810	1420	8620			1,660	10,000	1,420	8,340	0%	-3%	-15%	-17%
	Germany	17,390	24,260	19890	28340			5,610	15,370	6,180	17,430	-69%	-38%	10%	13%
	Other	3,720	20,940	3750	18730			2,380	12,430	3,770	20,380	0%	9%	58%	64%
Other	9,700	48,620	9550	42160			4,000	20,670	4,480	26,670	-53%	-37%	12%	29%	
Mode of departure	Scheduled air	61,580	327,370	61900	318870			44,980	247,680	53,430	266,410	-14%	-16%	19%	8%
	Scheduled ferry	29,490	85,920	29510	74770			14,770	79,670	17,290	82,300	-41%	10%	17%	3%
	Charter plane	500	500	610	610			620	620	520	520	-14%	-14%	-16%	-16%
	Charter yachtsmen	4,710	11,880	4970	13840			3,680	8,090	3,060	7,440	-38%	-46%	-17%	-8%
	Other passengers	240	0	350	0			730	0	0	0	-100%	0%	-100%	0%
Duration of stay	Day visits	13,570		12,950	0			3,670		4,080		-69%		11%	
	1-5 nights	28,880	62,230	31510	71880			19,520	44,420	30,090	68,960	-5%	-4%	54%	55%
	6-10 nights	24,520	110,830	26810	121840			17,900	84,820	18,320	86,140	-32%	-29%	2%	2%
	11-15 nights	19,970	135,510	18330	125630			16,470	115,320	14,710	102,990	-20%	-18%	-11%	-11%
	16+ nights	9,590	117,110	7740	88750			7,210	91,500	7,100	98,590	-8%	11%	-2%	8%

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

Year to date		3-year average 2017 to 2019		2019		2021		2022		2023		Change 23/19		Change 23/22	
Total passengers		665,020		674,960		114,230		475,170		555,500		-18%		17%	
Total visits		410,730		433,840		77,230		261,810		298,700		-31%		14%	
		Visits	Nights	Visits	Nights	Visits		Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights
	Overnight visits	346,180	1,516,880	362,811	1,492,573	75,500		245,470	1,148,970	269,150	1,223,560	-26%	-18%	10%	6%
	Day visits	64,540		71,030		1,730		16,330		29,550		-58%		81%	
		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
	<b>Total Holiday visits</b>	<b>270,630</b>		<b>279,470</b>		<b>44,110</b>		<b>156,890</b>		<b>180,230</b>		<b>-36%</b>		<b>15%</b>	
	- Overnight visits	234,760	1,046,690	246,880	1,059,210	42,990		147,840	719,060	159,730	722,160	-35%	-32%	8%	0.4%
	- Day visits	35,880		32,600		1,120		9,050		20,500		-37%		127%	
	<b>Total Business visits</b>	<b>42,920</b>		<b>39,940</b>		<b>5,740</b>		<b>31,070</b>		<b>34,290</b>		<b>-14%</b>		<b>10%</b>	
	- Overnight visits	32,620	114,640	29,250	85,430	5,410		27,040	84,240	30,140	94,600	3%	11%	11%	12%
	- Day visits	10,300		10,680		330		4,030		4,160		-61%		3%	
	<b>Total VFR visits</b>	<b>57,150</b>		<b>60,290</b>		<b>23,580</b>		<b>55,050</b>		<b>64,660</b>		<b>7%</b>		<b>17%</b>	
	- Overnight visits	56,360	285,010	58,700	285,700	23,400		54,390	299,180	63,900	350,560	9%	23%	17%	17%
	- Day visits	790		1,590		180		660		760		-52%		15%	
	<b>Total Other visits</b>	<b>40,020</b>		<b>54,150</b>		<b>3,800</b>		<b>18,800</b>		<b>19,520</b>		<b>-64%</b>		<b>4%</b>	
	- Overnight visits	22,450	70,390	27,990	62,230	3,700		16,180	46,490	15,370	56,240	-45%	-10%	-5%	21%
	- Day visits	17,570		26,160		100		2,620		4,150		-84%		58%	
Country of residence	UK	257,530	1,141,970	274,620	1,154,950			197,990	921,580	212,260	950,900	-23%	-18%	7%	3%
	Other CI	29,300	43,230	36,640	52,130			17,530	37,020	19,650	36,720	-46%	-30%	12%	-1%
	Ireland	4,670	24,840	4,610	22,940			3,950	21,130	4,150	22,830	-10%	0%	5%	8%
	France	74,660	89,520	76,880	75,560			21,330	53,280	39,390	66,320	-49%	-12%	85%	24%
	Germany	11,430	61,080	12,320	63,370			8,120	38,980	7,770	42,780	-37%	-32%	-4%	10%
	Other	33,130	156,250	28,780	123,630			12,870	76,980	15,490	104,010	-46%	-16%	20%	35%
Mode of departure	Scheduled air	280,760	1,214,790	303,020	1,231,050			196,940	881,680	216,190	968,500	-29%	-21%	10%	10%
	Scheduled ferry	115,020	274,480	114,710	229,650			54,270	251,990	71,460	234,990	-38%	2%	32%	-7%
	Private plane	2,570	2,570	3,300	3,300			3,240	3,240	2,930	2,930	-11%	-11%	-9%	-9%
	Visiting yachtsmen	10,810	25,030	11,290	28,550			5,870	12,060	7,810	17,150	-31%	-40%	33%	42%
	Cruise passengers	1,560	0	1,520	0			1,490	0	310	0	0%		0%	
Duration of stay	Day visits	64,540		71,030	0			16,330		29,860		-58%		83%	
	1-3 nights	162,250	363,050	181,360	401,510			109,980	244,580	132,980	295,200	-27%	-26%	21%	21%
	4 - 6 nights	107,290	481,150	107,620	482,920			74,910	346,730	75,220	344,090	-30%	-29%	0%	-1%
	7 nights	53,440	365,930	53,090	365,480			40,850	285,970	41,120	287,820	-23%	-21%	1%	1%
	8+ nights	23,200	306,740	20,740	242,660			19,720	271,690	19,510	296,450	-6%	22%	-1%	9%

## 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.