

## August 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

#### August 2023 compared to August 2019

- The total number of **departing passengers**<sup>1</sup> was **133,380** reflecting a recovery to **81%** of the level seen in August 2019.
- In comparison, the number of tourism visitors reaching the end of their stay in Jersey (**83,740**) recovered to two-thirds (**66%**) of pre-pandemic levels.
- The number of visitors staying for at least one night recovered to **78%**, whilst the day trip market showed a much slower recovery to **22%**.
- The **average length of stay (5.6 nights)** for those visitors staying at least one night was marginally higher than in August 2019 (**5.3**).
- The total number of nights spent by all visitors to Jersey was **437,210** reflecting a recovery to **83%**.
- Breaking the visitor numbers down by main **purpose of visit**:
  - **leisure** visits accounted for two-thirds 68% of all visits at **57,230**, a lower proportion to that seen in the same period of 2019 when leisure visits accounted for 82%
  - **business** visits accounted for 4% of visits at **3,490**
  - **visits to see friends and family** accounted for a quarter (25%) of visits at 21,220, a

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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.

larger proportion than in August 2019 (14%)

- The number of leisure visitors was at 55% of the level seen in August 2019 whilst the number of visitor nights was at 67% due to the increased average length of stay.
  - The number of leisure day trips in August did not demonstrate the same strong recovery recorded over April to June 2023; in August 2023, the leisure day trip market was at a fifth (21%) of the level recorded in August 2019.
  - The French day trip ID exception scheme was brought in on the 22<sup>nd</sup> April 2023 and from April to June a strong recovery in leisure day trips was recorded. In July and August the recovery in the day trip market has slowed significantly.
  - Of the leisure day trip market, 80% of visitors were from France equating to around 4,860 visitors.
  - The total number of business visits (3,490) increased by more than a quarter (27%) compared to August 2019 and the number of business nights more than doubled (154%); whilst the number of overnight visits was up significantly (61%), the number of day visits made for business purposes remains at less than half (48% recovery).
  - The total number of visits to see friends and relatives (21,220) increased by 16% and the number of nights increased by a quarter (28%).
  - Breaking the visitor numbers down by **travel method**:
    - 67% of visitors travelled by scheduled air services (55,930)
    - Around a quarter (28%) of visitors travelled by scheduled ferry services (23,280)
    - The number of visitors travelling via scheduled air recovered to 76% whilst the number of visitors travelling via scheduled sea services recovered to half (50%).
    - Whilst the number of visitors travelling by scheduled sea services remains significantly lower than in August 2019, the number of visitors nights was consistent with 2019 levels (0% change) due to a longer average length of stay.
  - Breaking visitor numbers down by **country of residence**:
    - the UK, Irish and Channel Island markets showed the strongest recovery in the latest month with visitor numbers recorded at between 67% to 79% of August 2019 levels.
    - The international markets (France, Germany and other Countries) showed a slower recovery with visitor numbers recorded at less than half of August 2019 levels.
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## August 2023 compared to August 2022

- The total number of **departing passengers** increased by **9%** compared with the same period of 2022.
  - The number of **departing visitors** increased by **7%**.
  - The number of **other passengers** (residents, passengers in transit, seasonal workers, etc.) departing from Jersey increased by **14%**.
  - The number of overnight visitors (visitors staying at least one night) increased by 8% whilst the number of day visitors decreased by 12%.
  - The **average length of stay** (for those visitors staying for at least one night) decreased by half a day on an annual basis (from 6.1 nights to 5.6 nights); the number of visitor nights remained consistent (0% change).
  - The number of leisure visitors remained consistent with 2022 levels (0% change) whilst the number of visitor nights decreased by 9% due to the decreased average length of stay for this visitor type; average length of stay was down by 9% from 5.2 nights in August 2022 to 4.7 nights in August 2023.
  - The number of business visitors increased by 29% and the number of visitor nights increased by 43%; average length of stay for this visitor type increased by 10% from 3.7 to 4.1 nights.
  - The number of visitors who came to Jersey to see friends and family increased by around a fifth (+20%) on an annual basis as did the number of visitor nights (+19%); the average length of stay remained consistent at 6.9 nights.
  - The number of visits from the UK in August 2023 remained relatively consistent with August 2022 (+2%) as did the number of visitor nights (0% change).
  - Increased numbers of visitors were observed from the Channel Islands (+69%), France (+52%) and Ireland (+43%).
  - In comparison, the number of visitors from Germany and other foreign countries decreased compared to August 2022 by 49% and 18% respectively.
  - The number of visitors travelling via scheduled air increased by 12% on an annual basis where as the number of visitors travelling by scheduled ferry services remained consistent (-2%).
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**Table A1: August 2017 to August 2023**

August		<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		161,500		165,400		81,430		122,160		133,380		-19%		9%	
Total visits		119,770		127,570		51,510		78,590		83,740		-34%		7%	
		Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights
Topline	Overnight visits	97,410	508,550	99,927	527,061	49,590		71,690	436,750	77,670	437,210	-22%	-17%	8%	0%
	Day visits	22,360		27,650		1,920		6,900		6,070		-78%		-12%	
		<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	<b>Total Leisure/Holiday</b>	<b>97,820</b>		<b>103,970</b>		<b>36,520</b>		<b>57,110</b>		<b>57,230</b>		<b>-45%</b>		<b>0%</b>	
	- Overnight visits	77,140	392,840	77,970	399,260	35,000		50,730	293,940	51,820	268,230	-34%	-33%	2%	-9%
	- Day visits	20,680		26,000		1,520		6,380		5,410		-79%		-15%	
	<b>Total Business visits</b>	<b>4,040</b>		<b>2,760</b>		<b>1,840</b>		<b>2,710</b>		<b>3,490</b>		<b>27%</b>		<b>29%</b>	
	- Overnight visits	3,070	11,150	1,920	5,600	1,660		2,480	9,970	3,090	14,240	61%	154%	25%	43%
	- Day visits	980		840		180		220		400		-52%		79%	
	<b>Total VFR visits</b>	<b>15,320</b>		<b>18,270</b>		<b>12,450</b>		<b>17,680</b>		<b>21,220</b>		<b>16%</b>		<b>20%</b>	
	- Overnight visits	15,180	95,920	18,270	113,730	12,330		17,630	122,200	21,030	145,860	15%	28%	19%	19%
	- Day visits	140		0		120		50		190		100%		266%	
	<b>Total Other visits</b>	<b>2,590</b>		<b>2,580</b>		<b>700</b>		<b>1,090</b>		<b>1,800</b>		<b>-30%</b>		<b>65%</b>	
- Overnight visits	2,020	8,630	1,770	8,470	600		1,090	10,640	1,730	8,890	-2%	5%	58%	-17%	
- Day visits	570		810		100		0		70		-91%		100%		
Country of residence	UK	72,000	395,300	74,640	410,140			57,630	343,430	58,880	342,830	-21%	-16%	2%	0%
	Other CI	5,090	8,950	5,120	9,750			2,020	4,760	3,420	11,310	-33%	16%	69%	138%
	Ireland	2,020	12,430	2,330	16,500			1,200	9,030	1,720	10,440	-26%	-37%	43%	16%
	France	27,180	36,040	28,230	29,000			9,090	23,910	13,850	27,440	-51%	-5%	52%	15%
	Germany	4,570	19,590	5,550	19,190			3,990	18,220	2,050	12,290	-63%	-36%	-49%	-33%
	Other	8,900	36,240	11,710	42,500			4,660	37,410	3,830	32,900	-67%	-23%	-18%	-12%
Mode of departure	Scheduled air	69,840	376,030	73,780	407,460			49,930	304,440	55,930	321,010	-24%	-21%	12%	5%
	Scheduled ferry	42,480	120,150	46,390	107,720			23,850	124,730	23,280	107,280	-50%	0%	-2%	-14%
	Private plane	450	450	530	530			630	630	540	540	3%	3%	-14%	-14%
	Visiting yachtsmen	5,350	11,910	5,410	11,360			3,340	6,960	3,990	8,380	-26%	-26%	19%	20%
	Cruise passengers	1,650	0	1,470	0			840	0	0	0	-100%	0%	-100%	0%
Duration of stay	Day visits	22,360	0	27,650	0			6,900	0	6,070	0	-78%		-12%	
	1-3 nights	30,880	68,020	30,550	72,320			19,360	44,570	26,640	61,850	-13%	-14%	38%	39%
	4 - 6 nights	30,390	137,880	31,240	144,240			23,610	110,180	24,230	113,960	-22%	-21%	3%	3%
	7 nights	25,160	170,750	27,550	187,990			17,760	124,340	15,950	111,670	-42%	-41%	-10%	-10%
	8+ nights	10,980	131,890	10,580	122,510			10,960	157,660	10,850	149,740	2%	22%	-1%	-5%

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

Year to date		3-year average 2017 to 2019		2019		2021		2022		2023		Change 23/19		Change 23/22	
Total passengers		826,520		840,350		195,660		597,330		688,870		-18%		15%	
Total visits		530,490		561,420		128,740		340,390		382,440		-32%		12%	
		Visits	Nights	Visits	Nights	Visits		Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights
	Overnight visits	443,590	2,025,430	462,738	2,019,634	125,090		317,160	1,585,730	346,820	1,660,770	-25%	-18%	9%	5%
	Day visits	86,900		98,680		3,650		23,230		35,620		-64%		53%	
		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	<b>Leisure/Holiday</b>	<b>368,460</b>		<b>383,440</b>		<b>80,630</b>		<b>213,990</b>		<b>237,450</b>		<b>-38%</b>		<b>11%</b>	
	- Overnight visits	311,900	1,439,530	324,850	1,458,470	77,990		198,570	1,013,000	211,550	990,390	-35%	-32%	7%	-2.2%
	- Day visits	56,560		58,590		2,640		15,430		25,910		-56%		68%	
	<b>Total Business visits</b>	<b>46,960</b>		<b>42,690</b>		<b>7,580</b>		<b>33,770</b>		<b>37,780</b>		<b>-12%</b>		<b>12%</b>	
	- Overnight visits	35,680	125,790	31,170	91,020	7,070		29,520	94,210	33,230	108,840	7%	20%	13%	16%
	- Day visits	11,280		11,520		510		4,250		4,560		-60%		7%	
	<b>Total VFR visits</b>	<b>72,460</b>		<b>78,560</b>		<b>36,030</b>		<b>72,730</b>		<b>85,880</b>		<b>9%</b>		<b>18%</b>	
	- Overnight visits	71,530	380,930	76,970	399,430	35,730		72,020	421,380	84,930	496,430	10%	24%	18%	18%
	- Day visits	930		1,590		300		710		950		-40%		34%	
	<b>Total Other visits</b>	<b>42,610</b>		<b>56,730</b>		<b>4,500</b>		<b>19,900</b>		<b>21,320</b>		<b>-62%</b>		<b>7%</b>	
- Overnight visits	24,470	79,020	29,760	70,710	4,300		17,270	57,130	17,100	65,120	-43%	-8%	-1%	14%	
- Day visits	18,140		26,980		200		2,620		4,220		-84%		61%		
Country of residence	UK	329,540	1,537,270	349,260	1,565,090			255,620	1,265,000	271,140	1,293,740	-22%	-17%	6%	2%
	Other CI	34,390	52,170	41,750	61,880			19,560	41,780	23,060	48,030	-45%	-22%	18%	15%
	Ireland	6,700	37,270	6,930	39,430			5,150	30,160	5,870	33,270	-15%	-16%	14%	10%
	France	101,840	125,550	105,110	104,560			30,420	77,190	53,230	93,760	-49%	-10%	75%	21%
	Germany	16,000	80,670	17,870	82,560			12,110	57,200	9,820	55,060	-45%	-33%	-19%	-4%
	Other	42,030	192,490	40,490	166,120			17,530	114,390	19,310	136,910	-52%	-18%	10%	20%
Mode of departure	Scheduled air	350,600	1,590,830	376,800	1,638,510			246,870	1,186,120	272,120	1,289,510	-28%	-21%	10%	9%
	Scheduled ferry	157,500	394,630	161,090	337,370			78,120	376,720	94,740	342,270	-41%	1%	21%	-9%
	Private plane	3,020	3,020	3,830	3,830			3,870	3,870	3,470	3,470	-9%	-9%	-10%	-10%
	Visiting yachtsmen	16,160	36,940	16,700	39,900			9,210	19,020	11,800	25,530	-29%	-36%	28%	34%
	Cruise passengers	3,210	0	3,000	0			2,330	0	310	0	0%		0%	
Duration of stay	Day visits	86,900		98,680	0			23,230		35,940		-64%		55%	
	1-3 nights	193,130	431,080	211,910	473,830			129,340	289,150	159,630	357,060	-25%	-25%	23%	23%
	4 - 6 nights	137,680	619,030	138,860	627,160			98,520	456,910	99,450	458,050	-28%	-27%	1%	0%
	7 nights	78,600	536,680	80,640	553,470			58,620	410,320	57,070	399,490	-29%	-28%	-3%	-3%
	8+ nights	34,180	438,630	31,330	365,170			30,680	429,360	30,360	446,180	-3%	22%	-1%	4%

## 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.