



September 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

September 2023 compared to September 2019

- The total number of **departing passengers**¹ was **100,600** reflecting a recovery to **82%** of the level seen in September 2019.
- The number of tourism visitors reaching the end of their stay in Jersey (**58,830**) recovered to around two-thirds (**69%**).
- The number of visitors staying for at least one night recovered to almost three-quarters (**77%**) whilst the day trip market showed a significantly slower recovery to around a quarter (**24%**) of 2019 levels.
- The **average length of stay (5.0 nights)** for those visitors staying at least one night was higher than in September 2019 (**4.5 nights**).
- The total number of nights spent by all visitors to Jersey was **278,450** reflecting a recovery to **86%**.
- Breaking the visitor numbers down by main **purpose of visit**:
 - **leisure** visits accounted for two-thirds (67%) of all visits at 39,470; pre-pandemic (2019), the proportion of visits made for leisure purposes was 71%
 - **business** visits accounted for 9% of visits at **5,130**
 - **visits to see friends and family** accounted for **21%** of visits at 12,140

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 leisure visitors was at 65% of 2019 levels whilst the number of visitor nights showed a strong recovery to 83%, due to an increased average length of stay for this visitor type.
 - Recovery in the overall number of leisure visits is being significantly impacted by the reduced day trip market; in September the number of leisure day trips was recorded at just over a quarter (28%) of that seen in September 2019.
 - In comparison, the number of overnight leisure visits recovered to 72%.
 - The total number of business visits (5,130) recovered to 77% compared to September 2019, whilst the number of visitor nights was up by 21%.
 - The total number of visits to see friends and relatives (12,140)- increased by more than a quarter (28%) and the number of visitors nights increased by 55%.
 - Breaking the visitor numbers down by **travel method**:
 - 72% of visitors travelled by scheduled air services (42,350).
 - A quarter (25%) of visitors travelled by scheduled ferry services (14,520).
 - The number of visitors travelling via scheduled air recovered to three-quarters (75%) of 2019 levels whilst the number of visitors travelling via scheduled sea services recovered to over half (56%).
 - Whilst the number of visitors travelling by scheduled sea services remains significantly lower than in September 2019, the number of visitor nights was relatively consistent (5% decrease). This is the result of overnight ferry visitors staying significantly longer on average (2.3 nights in September 2019 compared to 3.8 nights in September 2023).
 - Breaking visitor numbers down by **country of residence**:
 - the UK, Irish and German markets showed the strongest recovery in the latest month with visitor numbers recorded at between 79% to 90% of 2019 levels.
 - The French and Channel Island markets showed a slower recovery with visitor numbers recorded at 54% and 58% of September 2019 levels respectively.
 - Whilst the number of French visitors remains at around half of the level seen pre-pandemic, the number of nights spent on Island by French visitors has increased by 43% since 2019.
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September 2023 compared to September 2022

- The total number of **departing passengers** increased by **11%** compared with the same period of 2022.
 - The number of **departing visitors** increased by **16%**.
 - The number of overnight visitors (visitors staying at least one night) increased by 15% whilst the number of day visitors increased by 34%.
 - The **average length of stay** (for those visitors staying for at least one night) decreased from 5.4 nights 2022 to 5.0 nights in 2023; the number of visitor nights marginally increased by 7% on an annual basis.
 - The number of visitors travelling for leisure, business and to see friends and relatives all increased by a similar proportion (between 16% to 18%).
 - For all visit purposes, a larger increase was observed in the number of day visitors than the number of overnight visitors.
 - The number of visitor nights increased marginally for leisure visitors (+7%) and for those visiting friends and relatives (+3%); in comparison the number of visitor nights was up by a quarter (24%) for business visitors.
 - The number of visits from the UK in September 2023 increased by around a tenth (+12%) when compared with September 2022 as did the number of visitor nights (+11%).
 - A significant increase in visitors from the Channel Islands (+35%) and France (+154%) was also observed on an annual basis.
 - In comparison, the number of visitors from Germany, Ireland and other foreign countries saw a decline compared to the same period of 2022 (-42%, -47% and -12% respectively).
 - The number of visitors travelling via scheduled air increased by 9% on an annual basis whereas the number of visitors travelling by scheduled ferry services increased by 35%.
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Table A1: September 2017 to September 2023

September		<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		123,450		122,010		72,500		91,010		100,600		-18%		11%	
Total visits		83,430		85,070		47,660		50,700		58,830		-31%		16%	
		Visits	Nights	Visits	Nights	Visits	Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights	
Topline	Overnight visits	71,250	332,930	71,753	322,814	45,990	48,290	259,970	55,600	278,450	-23%	-14%	15%	7%	
	Day visits	12,180		13,320		1,670	2,410		3,230		-76%		34%		
		<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 Leisure/Holiday	60,640		60,640		31,970	34,110		39,470		-35%		16%		
	- Overnight visits	51,860	252,020	51,330	230,800	30,900	32,100	177,770	36,900	190,500	-28%	-17%	15%	7%	
	- Day visits	8,790		9,300		1,070	2,010		2,560		-72%		27%		
	Total Business visits	7,590		6,630		4,220	4,310		5,130		-23%		19%		
	- Overnight visits	6,040	13,990	6,030	11,460	3,800	3,950	11,200	4,660	13,860	-23%	21%	18%	24%	
	- Day visits	1,550		600		420	370		470		-20%		30%		
	Total VFR visits	10,120		9,500		7,970	10,290		12,140		28%		18%		
	- Overnight visits	10,000	49,260	9,350	43,090	7,890	10,260	64,850	12,040	66,730	29%	55%	17%	3%	
	- Day visits	120		150		80	30		100		100%		194%		
	Total Other visits	5,080		8,300		3,500	1,980		2,090		-75%		5%		
- Overnight visits	3,360	17,660	5,030	37,460	3,400	1,980	6,160	2,000	7,380	-60%	-80%	1%	20%		
- Day visits	1,720		3,270		100	0		90		-97%		100%			
Country of residence	UK	55,870	271,460	54,640	260,580		38,620	199,090	43,130	220,280	-21%	-15%	12%	11%	
	Other CI	5,130	10,770	5,560	10,940		2,380	6,940	3,230	10,250	-42%	-6%	35%	48%	
	Ireland	1,130	5,710	800	3,790		1,360	8,070	720	3,820	-10%	1%	-47%	-53%	
	France	12,860	10,950	14,830	11,690		3,140	7,350	7,960	16,730	-46%	43%	154%	128%	
	Germany	2,700	15,380	1,800	8,130		2,680	13,410	1,560	10,840	-13%	33%	-42%	-19%	
	Other	5,740	18,670	7,450	27,680		2,520	25,110	2,230	16,540	-70%	-40%	-12%	-34%	
Mode of departure	Scheduled air	57,170	269,730	56,660	261,060		38,860	211,140	42,350	217,840	-25%	-17%	9%	3%	
	Scheduled ferry	23,760	60,040	25,890	58,600		10,790	47,350	14,520	55,470	-44%	-5%	35%	17%	
	Private plane	520	520	590	590		530	530	510	510	-13%	-13%	-4%	-4%	
	Visiting yachtsmen	1,380	2,630	1,300	2,570		510	960	1,450	4,640	12%	81%	183%	385%	
	Cruise passengers	600	0	630	0		0	0	0	0	-100%	0%	#DIV/0!	0%	
Duration of stay	Day visits	12,180	0	13,320	0		2,410	0	3,230	0	-76%		34%		
	1-3 nights	28,430	62,510	30,190	66,420		16,120	37,240	22,640	52,450	-25%	-21%	40%	41%	
	4 - 6 nights	21,840	102,240	20,910	96,320		15,830	74,820	17,470	80,940	-16%	-16%	10%	8%	
	7 nights	15,940	111,180	16,570	114,230		11,740	82,180	10,320	72,220	-38%	-37%	-12%	-12%	
	8+ nights	5,040	57,000	4,100	45,840		4,590	65,730	5,170	72,850	26%	59%	12%	11%	

Table A2: Cumulative - January to September 2017 to 2023

Year to date		3-year average 2017 to 2019		2019		2021		2022		2023		Change 23/19		Change 23/22	
Total passengers		949,970		962,360		268,160		688,340		789,470		-18%		15%	
Total visits		613,920		646,490		176,400		391,090		441,270		-32%		13%	
		Visits	Nights	Visits	Nights	Visits		Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights
	Overnight visits	514,840	2,358,360	534,491	2,342,448	171,080		365,450	1,845,700	402,420	1,939,220	-25%	-17%	10%	5%
	Day visits	99,080		112,000		5,320		25,640		38,850		-65%		52%	
		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	429,100		444,070		112,600		248,100		276,920		-38%		12%	
	- Overnight visits	363,760	1,691,550	376,180	1,689,270	108,890		230,670	1,190,770	248,450	1,180,880	-34%	-30%	8%	-0.8%
	- Day visits	65,340		67,900		3,710		17,440		28,470		-58%		63%	
	Total Business visits	54,550		49,320		11,800		38,080		42,920		-13%		13%	
	- Overnight visits	41,720	139,790	37,210	102,480	10,870		33,470	105,410	37,890	122,690	2%	20%	13%	16%
	- Day visits	12,830		12,120		930		4,620		5,030		-58%		9%	
	Total VFR visits	82,590		88,060		44,000		83,020		98,020		11%		18%	
	- Overnight visits	81,530	430,190	86,320	442,520	43,620		82,280	486,230	96,970	563,150	12%	27%	18%	16%
	- Day visits	1,050		1,740		380		750		1,050		-40%		41%	
	Total Other visits	47,690		65,030		8,000		21,880		23,410		-64%		7%	
- Overnight visits	27,830	96,680	34,790	108,170	7,700		19,260	63,290	19,100	72,500	-45%	-33%	-1%	15%	
- Day visits	19,860		30,240		300		2,620		4,310		-86%		64%		
Country of residence	UK	385,410	1,808,730	403900	1825670			294,240	1,464,090	314,270	1,514,020	-22%	-17%	7%	3%
	Other CI	39,520	62,940	47310	72820			21,940	48,710	26,290	58,280	-44%	-20%	20%	20%
	Ireland	7,830	42,980	7740	43220			6,510	38,230	6,590	37,090	-15%	-14%	1%	-3%
	France	114,700	136,500	119940	116240			33,560	84,550	61,190	110,490	-49%	-5%	82%	31%
	Germany	18,700	96,050	19660	90680			14,790	70,610	11,370	65,900	-42%	-27%	-23%	-7%
	Other	47,770	211,160	47940	193810			20,050	139,500	21,540	153,440	-55%	-21%	7%	10%
Mode of departure	Scheduled air	407,770	1,860,560	433450	1899570			285,730	1,397,260	314,470	1,507,350	-27%	-21%	10%	8%
	Scheduled ferry	181,260	454,670	186990	395970			88,910	424,070	109,260	397,740	-42%	0%	23%	-6%
	Private plane	3,540	3,540	4420	4420			4,400	4,400	3,980	3,980	-10%	-10%	-9%	-9%
	Visiting yachtsmen	17,540	39,580	18010	42470			9,720	19,980	13,250	30,160	-26%	-29%	36%	51%
	Cruise passengers	3,800	0	3630	0			2,330	0	310	0	0%		0%	
Duration of stay	Day visits	99,080		111,990	0			25,640		39,160		-65%		53%	
	1-3 nights	221,560	493,590	242100	540260			145,460	326,390	182,270	409,500	-25%	-24%	25%	25%
	4 - 6 nights	159,510	721,270	159770	723480			114,350	531,730	116,930	538,990	-27%	-26%	2%	1%
	7 nights	94,540	647,870	97200	667700			70,360	492,490	67,390	471,700	-31%	-29%	-4%	-4%
	8+ nights	39,220	495,640	35420	411010			35,270	495,090	35,530	519,030	0%	26%	1%	5%

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.