



October 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

October 2023 compared to October 2019

- The total number of **departing passengers**¹ was **89,190** reflecting a recovery to **92%** of the level seen in October 2019; this reflects the strongest recovery observed since the survey recommenced following the pandemic.
- The number of tourism visitors reaching the end of their stay in Jersey (**49,100**) recovered to **83%**, again reflecting the strongest recovery observed since the travel disruption ended in 2022.
- The number of visitors staying for at least one night recovered to **86%** whilst the day trip market remained at around half of 2019 levels (**57% recovery**).
- The **average length of stay (4.0 nights)** for those visitors staying at least one night was similar to in October 2019 when it was 3.9 nights.
- The total number of nights spent by all visitors to Jersey was **184,570** reflecting a recovery to **88%**.
- Breaking the visitor numbers down by main **purpose of visit**:
 - **leisure** visits accounted for **62%** of all visits at **30,450**; the proportion of visits made for leisure purposes in Oct 2019 was 68%
 - **business** visits accounted for **12%** of visits at **5,700**

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.

- **visits to see friends and family** accounted for **15%** of visits at **7,460**
 - The number of leisure visits recovered to 76% and the number of visitors nights recovered to 72% when compared to October 2019 levels.
 - The leisure overnight market has shown a stronger recovery when compared to pre-pandemic levels than the leisure day trip market; in Oct 2023 the leisure overnight market recovered to 77% whilst the leisure day trip market recovered to 61%.
 - The total number of business visits increased by 11% when compared to Oct 2019 and the number of visitor nights increased significantly by 65%.
 - The total number of visits to see friends and relatives was similar to in Oct 2019 (93% recovery) however the number of visitor nights increased by almost a third (31% increase).
 - Breaking the visitor numbers down by **travel method**:
 - 65% of visitors travelled by scheduled air services (31,880).
 - A third (33%) of visitors travelled by scheduled ferry services (16,380).
 - The number of visitors travelling via scheduled air recovered to 68% of 2019 levels and the number of visitor nights recovered to 72%.
 - For the first time in 2023, the number of visitors travelling by scheduled sea services showed a stronger recovery than the number travelling by scheduled air. In October 2023, the number of visitors travelling by scheduled sea services increased by 44% when compared to October 2019 and the number of visitor nights almost doubled (+98%).
 - Breaking visitor numbers down by **country of residence**:
 - the French and Irish markets saw strong growth when compared to Oct 2019, with increases in visitor numbers recorded to the size of +40% and +71% respectively.
 - The number of visits from the other Channel Islands and other foreign countries were similar to pre-pandemic levels (-6% and -4% respectively).
 - The UK market recovered to 73% of 2019 levels whilst the German market was at 39%.
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October 2023 compared to October 2022

- The total number of **departing passengers** increased by **17%** compared with the same period of 2022 and the number of **departing visitors** increased by **14%**.
 - The number of overnight visitors (visitors staying at least one night) increased by 12% whilst the number of day visitors increased by around half (+48%)
 - The **average length of stay** (for those visitors staying for at least one night) decreased marginally from 4.3 nights in Oct 2022 to 4.0 nights in Oct 2023; the number of visitor nights marginally increased by 5% on an annual basis.
 - The number of visitors travelling for leisure increased significantly by 28% whilst the number of business visitors increased more moderately by 5%.
 - The number of visitors travelling to see friends and relatives decreased by a third (-31%) when compared to the peak observed in 2022; in Oct 2023, the VFR market returned to a level similar to that recorded pre-pandemic.
 - For all visit purposes, a larger increase was observed in the number of day visitors than the number of overnight visitors, with the number of day visits made for leisure and VFR purposes almost tripling on an annual basis.
 - A significant increase in visitors from the Channel Islands (+51%) and France (+203%) was observed on an annual basis; visitors travelling from these jurisdictions often travel by scheduled ferry services and the annual increase in these visitor markets is reflected in the significant increase in visitors travelling to the island by scheduled ferry (+121%)
 - In comparison, the UK, Irish, German and other foreign country markets, most commonly served by scheduled air services, all saw declines when compared to Oct 2022 (ranging between -2% and -52%); the number of visitors travelling by scheduled air services saw an annual decline of -9%.
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Year to date 2023

- From Jan to Oct 2023, the number of passengers departing from Jersey has increased by 15% on an annual basis and has recovered to 83% of 2019 levels.
- The number of departing visitors has increased by 13% compared to Jan to Oct 2022 and has recovered to 69% of 2019 levels.
- On an annual basis, the French market has seen the greatest increase in visitor volumes, with the number of visits made by French visitors almost doubling (+93%) compared to 2022.
- The number of visits made by scheduled sea services has increased by 30% on an annual basis whilst the number of visits made by scheduled air has increased more moderately by 8%.

For further 'year to date' statistics, please refer to Appendix A2.

Table A1: October 2017 to October 2023

October		3-year average 2017 to 2019		2019		2021		2022		2023		Change 23/19		Change 23/22	
Total passengers		96,310		97,220		66,440		75,940		89,190		-8%		17%	
Total visits		56,310		59,290		39,820		43,240		49,100		-17%		14%	
		Visits	Nights	Visits	Nights	Visits	Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights	
Topline	Overnight visits	51,400	212,740	53,534	209,768	38,170	41,010	175,730	45,800	184,570	-14%	-12%	12%	5%	
	Day visits	4,910		5,760		1,650	2,220		3,300		-43%		48%		
		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	Total Leisure visits	38,200		40,270		24,630	23,760		30,450		-24%		28%		
	- Overnight visits	35,460	143,030	36,640	149,280	23,810	23,010	99,970	28,240	107,740	-23%	-28%	23%	8%	
	- Day visits	2,740		3,620		820	750		2,210		-39%		194%		
	Total Business visits	5,930		5,120		4,460	5,420		5,700		11%		5%		
	- Overnight visits	4,300	20,010	3,330	9,610	3,790	4,700	15,550	4,950	15,840	49%	65%	5%	2%	
	- Day visits	1,630		1,790		670	720		750		-58%		3%		
	Total VFR visits	7,810		8,060		8,030	10,770		7,460		-7%		-31%		
	- Overnight visits	7,550	32,460	8,030	34,590	7,950	10,710	52,960	7,300	45,270	-9%	31%	-32%	-15%	
	- Day visits	250		30		80	60		160		430%		174%		
	Total Other visits	4,370		5,850		2,700	3,280		5,500		-6%		67%		
- Overnight visits	4,090	17,240	5,540	16,290	2,620	2,590	7,250	5,320	15,720	-4%	-3%	105%	117%		
- Day visits	280		310		80	690		180		-42%		100%			
Country of residence	UK	41,880	172,690	44,650	178,630		33,450	143,750	32,600	136,370	-27%	-24%	-3%	-5%	
	Other CI	4,140	6,930	4,190	8,010		2,610	4,980	3,930	10,590	-6%	32%	51%	113%	
	Ireland	680	2,940	290	1,390		630	3,180	500	1,870	71%	35%	-21%	-41%	
	France	6,230	11,440	6,950	6,840		3,200	8,330	9,710	19,420	40%	184%	203%	133%	
	Germany	1,130	4,490	1,260	4,990		1,020	4,650	490	2,640	-61%	-47%	-52%	-43%	
	Other	2,240	14,260	1,960	9,910		2,320	10,850	1,880	13,690	-4%	38%	-19%	26%	
Mode of departure	Scheduled air	44,200	173,750	47,040	182,910		34,990	143,580	31,880	132,330	-32%	-28%	-9%	-8%	
	Scheduled ferry	11,180	37,710	11,370	25,790		7,410	31,010	16,380	51,180	44%	98%	121%	65%	
	Private plane	410	410	410	410		490	490	370	370	-9%	-9%	-24%	-24%	
	Visiting yachtsmen	530	880	470	670		340	650	460	690	-2%	3%	35%	7%	
	Cruise passengers	0	0	0	0		0	0	0	0	0%	0%	0%	0%	
Duration of stay	Day visits	4,910	0	5,760	0		2,220	0	3,300	0	-43%		48%		
	1-3 nights	26,670	64,300	29,260	72,370		20,170	46,870	25,750	53,710	-12%	-26%	28%	15%	
	4 - 6 nights	17,150	77,050	17,290	79,220		13,850	63,080	13,730	62,210	-21%	-21%	-1%	-1%	
	7 nights	5,140	35,360	5,230	36,550		4,700	32,930	3,840	26,900	-26%	-26%	-18%	-18%	
	8+ nights	2,440	36,040	1,760	21,640		2,280	32,850	2,480	41,750	41%	93%	9%	27%	

Table A2: Cumulative - January to October 2017 to 2023

Year to date		3-year average 2017 to 2019		2019		2021		2022		2023		Change 23/19		Change 23/22	
Total passengers		1,046,280		1,059,580		28,597		764,270		878,650		-17%		15%	
Total visits		670,230		705,780		11,080		434,330		490,370		-31%		13%	
		Visits	Nights	Visits	Nights	Visits	Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights	
	Overnight visits	566,240	2,571,100	588,025	2,552,216	11,000	406,460	2,021,430	448,220	2,123,800	-24%	-17%	10%	5%	
	Day visits	103,990		117,750		80	27,870		42,150		-64%		51%		
		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 Leisure visits	467,300		484,340		3,330	271,870		307,370		-37%		13%		
	- Overnight visits	399,220	1,834,580	412,820	1,838,560	3,300	253,680	1,290,730	276,690	1,288,620	-33%	-30%	9%	-0.2%	
	- Day visits	68,080		71,520		30	18,190		30,680		-57%		69%		
	Total Business visits	60,480		54,440		1,600	43,500		48,610		-11%		12%		
	- Overnight visits	46,020	159,790	40,530	112,090	1,550	38,160	120,960	42,830	138,530	6%	24%	12%	15%	
	- Day visits	14,460		13,910		50	5,340		5,780		-58%		8%		
	Total VFR visits	90,390		96,110		5,750	93,800		105,480		10%		12%		
	- Overnight visits	89,090	462,650	94,340	477,110	5,750	92,990	539,190	104,270	608,430	11%	28%	12%	13%	
	- Day visits	1,310		1,770		0	800		1,210		-32%		51%		
	Total Other visits	52,050		70,880		400	25,160		28,910		-59%		15%		
- Overnight visits	31,920	113,930	40,330	124,460	400	21,850	70,540	24,420	88,220	-39%	-29%	12%	25%		
- Day visits	20,140		30,550		0	3,310		4,500		-85%		36%			
Country of residence	UK	427,280	1,981,410	448550	2004300		327,690	1,607,840	346,870	1,650,390	-23%	-18%	6%	3%	
	Other CI	43,670	69,870	51500	80840		24,550	53,690	30,220	68,870	-41%	-15%	23%	28%	
	Ireland	8,510	45,930	8030	44610		7,140	41,410	7,090	38,960	-12%	-13%	-1%	-6%	
	France	120,940	147,940	126890	123080		36,760	92,880	70,900	129,910	-44%	6%	93%	40%	
	Germany	19,830	100,530	20920	95680		15,810	75,260	11,860	68,540	-43%	-28%	-25%	-9%	
	Other	50,010	225,420	49900	203710		22,370	150,350	23,420	167,130	-53%	-18%	5%	11%	
Mode of departure	Scheduled air	451,970	2,034,310	480500	2082480		320,730	1,540,830	346,350	1,639,680	-28%	-21%	8%	6%	
	Scheduled ferry	192,440	492,390	198350	421760		96,320	455,080	125,640	448,910	-37%	6%	30%	-1%	
	Private plane	3,950	3,950	4830	4830		4,890	4,890	4,350	4,350	-10%	-10%	-11%	-11%	
	Visiting yachtsmen	18,060	40,450	18480	43140		10,070	20,620	13,710	30,850	-26%	-28%	36%	50%	
	Cruise passengers	3,800	0	3630	0		2,330	0	310	0	0%		0%		
Duration of stay	Day visits	103,990		117,750	0		27,870		42,460		-64%		52%		
	1-3 nights	248,230	557,880	271350	612620		165,640	373,260	208,020	463,210	-23%	-24%	26%	24%	
	4 - 6 nights	176,670	798,310	177060	802700		128,200	594,810	130,650	601,200	-26%	-25%	2%	1%	
	7 nights	99,680	683,220	102430	704250		75,060	525,430	71,230	498,600	-30%	-29%	-5%	-5%	
	8+ nights	41,660	531,680	37190	432650		37,550	527,940	38,010	560,780	2%	30%	1%	6%	

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.