November 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.

At the beginning of November, Jersey and the other Channel Islands were seriously impacted by Storm Ciarán which caused significant damage to the islands' infrastructure, displaced residents and caused major travel disruptions. The ports were temporarily closed and visitor travel continued to be impacted whilst the island moved into recovery phase and further bad weather was experienced throughout the month of November.

Monthly summary

November 2023 compared to November 2019

- The total number of **departing passengers**[1] was **51,050** reflecting a recovery to **79%** of the level seen in November 2019.

- The number of tourism visitors reaching the end of their stay in Jersey **(18,700)** was at just over half **(56%)** of the level seen in November 2019 and at the lowest level recorded since at least November 2017.

- The number of visitors staying for at least one night recovered to **59%** whilst the day trip market reflected around a third **(33%)** of the visitor volume recorded in the same period of 2019.

- The **average length of stay** (**4.5 nights**) for those visitors staying at least one night was significantly higher than in November 2019 (3.1); this is likely to reflect, in part, travel disruptions experienced by visitors attempting to depart from the island following storm Ciarán.

- The total number of nights spent by all visitors to Jersey was **77,140** reflecting a

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[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.

recovery to 86% of 2019 levels.

- Breaking the visitor numbers down by main **purpose of visit**:

  - **leisure** visits **(7,360)** accounted for **39%** of all visits in November 2023, a lower proportion than seen in 2019 when leisure visits accounted for more than half (52%) of all visits

  - **business** visits accounted for **28%** of visits at **5,200**

  - **visits to see friends and family** accounted for a quarter (**25%)** of visits at **4,690**

- The number of leisure visitors was at less than half (42%) of the level recorded in November 2019.

- The number of nights spent on the island by leisure visitors showed a stronger recovery to 54% due to an increased average length of stay for this visitor type.

- In November 2023 the leisure overnight and day trip markets showed similar recoveries when compared to November 2019; the overnight market recovered to 42% whilst the day trip market recovered to 39%.

- The total number of business visits recovered to 76% of 2019 levels however the number of visitor nights increased by 80%.

- Since the pandemic, business visitors have been consistently staying longer on average; in the latest month the average length of stay (3.9 days) was 2 days longer than in the same period of 2019.

- The total number of visits to see friends and relatives was at two-thirds (65%) of 2019 levels; in previous months of 2023 the volume of visitors travelling to the island to see friends and relatives has either been similar to or exceeded pre-pandemic volumes.

- Breaking the visitor numbers down by **travel method**:

  - 87% of visitors travelled by scheduled air services (16,180).

  - 12% of visitors travelled by scheduled ferry services (2,220).

  - The number of visitors travelling via scheduled air recovered to 57% of 2019 levels whilst the number of visitor nights recovered to 87%.

  - The number of visitors travelling via scheduled sea services recovered to 44% whilst the number of visitor nights recovered to 84%.

- Breaking visitor numbers down by **country of residence**:

  - the number of visitors from the UK was at 61% of 2019 levels

- the French and other Channel Island markets showed a slower recovery with visitor numbers recorded at 29% and 41% of November 2019 levels respectively

- whilst reflecting much smaller markets, the number of visitors from Ireland and Germany increased when compared with November 2019.

November 2023 compared to November 2022

- The number of **departing passengers** increased by 8% when compared to November 2022.

- For the first time in 2023, the monthly volume of **departing visitors** was shown to decline (-13%) on an annual basis.

- The number of overnight visitors (visitors staying at least one night) decreased by 13% whilst the number of day visitors decreased by 40%.

- The number of visitor nights was very similar to in the previous year (-1%) due to an increased **average length of stay** (for those visitors staying for at least one night); in November 2023, the average length of stay increased by more than half a day compared to the previous year.

- Whilst the number of leisure visits was similar to in November 2022 (-2%), a reduction in visitor volumes of between of around 20% to 25% was observed for all other visitor types (business visits, VFR and other visits).

- Whilst visitor volumes were down compared to 2022, the number of visitor nights spent by each visitor type increased marginally in the latest month excluding the number of visitor nights spent by people who had travelled to see friends and relatives; the number of visitor nights spent by this visitor type declined by 7% on an annual basis.

- The number of visits from the top 3 major markets (the UK, France and the other Channel Islands) all saw declines of between 16% and 32% when compared to November 2022.

- In comparison, the number of visitors from Ireland and other foreign countries saw increases on an annual basis however these markets reflect much smaller volumes and show greater variability year on year.

- The number of visitors travelling via scheduled air and scheduled sea both saw declines of 16%.

Year to date 2023

- From Jan to Nov 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 on by 11% compared to Jan to Nov 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 (+87%)

compared to 2022.

- The number of visits made by scheduled sea services has increased by 29% on an annual basis whilst the number of visits made by scheduled air has increased by 7%.

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

Table A1: November 2017 to November 2023

November	3-year average 2017 to 2019	2019	2021	2022	2023	Change 23/19	Change 23/22
Total passengers	63,400	64,780	40,200	47,250	51,050	-21%	8%
Total visits	32,780	33,650	19,260	22,320	18,700	-44%	-16%

	3-year average 2017 to 2019		2019		2021		2022		2023		Change 23/19		Change 23/22	
Topline	Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights
Overnight visits	29,530	102,320	28,893	89,299	18,410		19,720	77,570	17,150	77,140	-41%	-14%	-13%	-1%
Day visits	3,260		4,760		850		2,610		1,550		-67%		-40%	

Purpose of visit	3-year average 2017 to 2019		2019		2021		2022		2023		Change 23/19		Change 23/22	
	Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights
Total Leisure visits	15,170		17,650		9,830		7,520		7,360		-58%		-2%	
- Overnight visits	13,870	45,590	14,820	47,910	9,500		6,580	25,230	6,250	25,670	-58%	-46%	-5%	2%
- Day visits	1,300		2,830		330		940		1,110		-61%		18%	
Total Business visits	7,600		6,870		4,670		6,610		5,200		-24%		-21%	
- Overnight visits	5,980	17,880	5,590	10,460	4,200		5,560	17,750	4,830	18,810	-14%	80%	-13%	6%
- Day visits	1,620		1,280		470		1,050		370		-71%		-65%	
Total VFR visits	7,080		7,220		3,860		6,420		4,690		-35%		-27%	
- Overnight visits	6,940	32,220	6,940	27,520	3,830		6,350	30,450	4,630	28,220	-33%	3%	-27%	-7%
- Day visits	140		280		30		70		60		-80%		-12%	
Total Other visits	2,940		1,920		900		1,780		1,460		-24%		-18%	
- Overnight visits	2,740	6,640	1,550	3,410	880		1,230	4,140	1,440	4,440	-7%	30%	18%	7%
- Day visits	200		370		20		560		20		-96%		-97%	

Country of residence	Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights
UK	23,710	78,060	23640	71970			17,010	58,440	14,360	58,290	-39%	-19%	-16%	0%
Other CI	4,020	6,220	4240	6670			2,320	3,540	1,760	3,360	-59%	-50%	-24%	-5%
Ireland	320	1,670	110	710			170	880	330	2,140	198%	202%	91%	142%
France	3,310	5,410	4400	6130			1,870	5,850	1,280	1,300	-71%	-79%	-32%	-78%
Germany	100	2,920	10	20			120	540	60	280	530%	1529%	-48%	-49%
Other	1,320	8,050	1250	3810			830	8,310	920	11,770	-26%	209%	11%	42%

Mode of departure	Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights
Scheduled air	28,200	89,590	28260	80510			19,260	66,270	16,180	69,800	-43%	-13%	-16%	5%
Scheduled ferry	4,130	12,070	5020	8350			2,640	10,770	2,220	7,020	-56%	-16%	-16%	-35%
Private plane	350	350	320	320			300	300	280	280	-14%	-14%	-8%	-8%
Visiting yachtsmen	100	320	40	120			120	230	20	30	-45%	-72%	-81%	-85%
Cruise passengers	0	0	0	0			0	0	0	0	0%	0%	0%	0%

Duration of stay	Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights
Day visits	3,250	0	4,760	0			2,610	0	1,550	0	-67%		-40%	
1-3 nights	20,240	41,710	20920	44370			13,170	27,920	10,170	21,310	-51%	-52%	-23%	-24%
4 - 6 nights	6,200	26,720	5380	23570			4,190	19,310	4,420	19,900	-18%	-16%	6%	3%
7 nights	1,600	11,090	1830	12770			1,030	7,230	1,060	7,410	-42%	-42%	2%	2%
8+ nights	1,480	22,810	760	8590			1,330	23,100	1,500	28,510	97%	232%	13%	23%

Table A2: Year to date - January to November 2017 to 2023

Year to date	3-year average 2017 to 2019		2019		2021	2022		2023		Change 23/19		Change 23/22	
Total passengers	1,109,680		1,124,360		379,758	811,520		929,700		-17%		15%	
Total visits	703,010		739,430		236,220	456,650		509,070		-31%		11%	
	Visits	Nights	Visits	Nights	Visits	Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights
Overnight visits	595,770	2,673,420	616,918	2,641,515	228,400	426,180	2,098,990	465,360	2,200,930	-25%	-17%	9%	5%
Day visits	107,240		122,510		7,820	30,470		43,700		-64%		43%	

		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	**482,470**		**501,980**		**147,060**	**279,380**		**314,730**		**-37%**		**13%**	
	- Overnight visits	413,090	1,880,170	427,640	1,886,470	142,200	260,260	1,315,970	282,940	1,314,290	-34%	-30%	9%	-0.1%
	- Day visits	69,380		74,350		4,860	19,130		31,790		-57%		66%	
	Total Business visits	**68,080**		**61,310**		**21,200**	**50,120**		**53,810**		**-12%**		**7%**	
	- Overnight visits	52,000	177,670	46,120	122,550	19,130	43,730	138,710	47,660	157,340	3%	28%	9%	13%
	- Day visits	16,080		15,190		3,040	6,390		6,150		-60%		-4%	
	Total VFR visits	**97,470**		**103,330**		**56,360**	**100,210**		**110,170**		**7%**		**10%**	
	- Overnight visits	96,020	494,870	101,280	504,630	55,870	99,340	569,640	108,900	636,650	8%	26%	10%	12%
	- Day visits	1,440		2,050		490	870		1,270		-38%		46%	
	Total Other visits	**54,990**		**72,810**		**11,600**	**26,940**		**30,370**		**-58%**		**13%**	
	- Overnight visits	34,650	120,570	41,880	127,870	11,200	23,070	74,690	25,860	92,660	-38%	-28%	12%	24%
	- Day visits	20,330		30,920		400	3,870		4,510		-85%		17%	
Country of residence	UK	450,990	2,059,470	472190	2076270		344,700	1,666,290	361,230	1,708,680	-23%	-18%	5%	3%
	Other CI	47,680	76,090	55740	87500		26,870	57,230	31,970	72,220	-43%	-17%	19%	26%
	Ireland	8,830	47,600	8140	45320		7,310	42,290	7,420	41,110	-9%	-9%	1%	-3%
	France	124,250	153,340	131280	129210		38,640	98,730	72,180	131,210	-45%	2%	87%	33%
	Germany	19,930	103,450	20930	95690		15,930	75,800	11,920	68,820	-43%	-28%	-25%	-9%
	Other	51,330	233,470	51150	207530		23,200	158,650	24,340	178,900	-52%	-14%	5%	13%
Mode of departure	Scheduled air	480,170	2,123,890	508760	2162980		339,990	1,607,100	362,540	1,709,480	-29%	-21%	7%	6%
	Scheduled ferry	196,580	504,460	203370	430110		98,960	465,850	127,860	455,940	-37%	6%	29%	-2%
	Private plane	4,290	4,290	5150	5150		5,190	5,190	4,630	4,630	-10%	-10%	-11%	-11%
	Visiting yachtsmen	18,160	40,770	18520	43260		10,190	20,860	13,740	30,890	-26%	-29%	35%	48%
	Cruise passengers	3,800	0	3630	0		2,330	0	310	0	0%		0%	
Duration of stay	Day visits	107,240		122,510	0		30,480		44,020		-64%		44%	
	1-3 nights	268,480	599,590	292270	656990		178,810	401,180	218,190	484,520	-25%	-26%	22%	21%
	4 - 6 nights	182,860	825,030	182440	826270		132,390	614,120	135,080	621,100	-26%	-25%	2%	1%
	7 nights	101,290	694,310	104260	717020		76,090	532,660	72,290	506,010	-31%	-29%	-5%	-5%
	8+ nights	43,140	554,490	37950	441240		38,880	551,030	39,500	589,300	4%	34%	2%	7%

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.