



## December 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.

Important to note that unsettled weather continued into December with Storm Gerrit causing boats and flights to be cancelled the weeks either side of Christmas day.

### Monthly summary

#### December 2023 compared to December 2019

- The total number of **departing passengers**<sup>1</sup> (**60,320**) recovered to **87%** of the level seen in December 2019.
- The number of tourism visitors was **17,450**, reflecting just over half (**56%**) of the level seen in December 2019 and the lowest number of visitors observed in this period since at least 2017.
- The number of visitors staying for at least one night was at around half of pre-pandemic levels (recovery to 52%) whilst the day trip market saw a full a recovery (+3% compared to December 2019).
- The **average length of stay** (**4.6 nights**) for those visitors staying at least one night was more than one night longer than in December 2019 (3.4 nights).
- The total number of nights spent by all visitors to Jersey was **67,400** reflecting a recovery to 70%.
- Breaking the visitor numbers down by main **purpose of visit**:
  - **leisure** visits (**6,990**) accounted for **40%** of all visits in December 2023, a similar proportion to that recorded in 2019 (40%)

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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.

- **business** visits accounted for **15%** of visits at **2,690**
- **visits to see friends and family** accounted for **41%** of visits at **7,210**
- The number of leisure visitors was around half (55%) of the level recorded in December 2019.
- Whilst the leisure overnight market was at less than half of 2019 levels (41% recovery), the day trip market was seen to almost double (+97%)
- The total number of business visits recovered to just over half (56%) of December 2019 levels.
- In the latest month, the number of overnight business visits recovered to 64%, showing a stronger recovery than the number of day trip business visits (recovery to 23%).
- The total number of visits to see friends and relatives was at three-quarters (75%) of 2019 levels; previous to November 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**:
  - 79% of visitors travelled by scheduled air services (13,860)
  - 19% of visitors travelled by scheduled ferry services (3,270)
  - the number of visitors travelling by scheduled ferry services showed a stronger recovery (to 66% of 2019 levels) in December 2023 than the number of visitors travelling by scheduled air services (recovery to 54%)
- Breaking visitor numbers down by **country of residence**:
  - the number of visitors from the UK and France were at around 60% of 2019 levels (recovery to 58% and 62% respectively)
  - the other Channel Island markets was at a third (36%) of pre-pandemic levels

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### December 2023 compared to December 2022

- The number of **departing passengers** remained consistent (+3%) when compared to December 2022.
- The number of **departing visitors** was shown to decline (-9%) on an annual basis.
- The annual decline in departing visitors was driven by a significant decline in overnight visits (-17%); in comparison the number of day visits almost doubled on an annual basis (+83%)
- The number of visitor nights decreased by more than a fifth (-21%); this is in part driven

by a slightly shorter average length of stay (4.8 nights recorded in December 2022 compared to 4.6 in December 2023).

- Whilst a significant increase was observed in the number of leisure visits (+48%), a reduction in visitor volumes of between 21% to 31% was observed for all other visitor types (business visits, VFR and other visits).
- The increase in leisure visits was largely driven by a significant increase in the number of leisure day visits (+278%); in comparison the number of overnight leisure visits increased more moderately by 15%.
- The number of visitor nights recorded for leisure visitors was seen to increase by almost a third (31%).
- In comparison, the number of visitor nights recorded for business visitors fell by 15% and for those travelling to see friends and relatives by 35%.
- Compared to December 2022, the UK market declined by 13% and the other Channel Island market declined by 26%.
- The number of visitors travelling from France increased by 59% compared to December 2022.
- The number of visitors travelling via scheduled air and scheduled sea saw declines of 10% and 5% respectively.

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### **Jan to Dec 2023**

- Across Jan to Dec 2023, the number of passengers departing from Jersey has increased by 14% on an annual basis, recovering to 83% of 2019 levels.
- The number of departing visitors has increased by 11% compared to 2022 and has recovered to 68%.
- On an annual basis, the French market has almost doubled (+86%).
- In comparison the German market has reduced by a quarter (-25%) since 2022.
- All other major markets have seen moderate annual growth of between 2% and 16%.
- The number of visits made by scheduled sea services has increased by 28% on an annual basis whilst the number of visits made by scheduled air has increased by 6%.

For further 2023 annual statistics, please refer to Appendix A2.

**Table A1: December 2017 to December 2023**

December		3-year average 2017 to 2019		2019		2021		2022		2023		Change 23/19		Change 23/22		
Total passengers		68,590		69,150		42,200		58,300		60,320		-13%		3%		
Total visits		30,730		31,260		19,280		19,180		17,450		-44%		-9%		
		Visits	Nights	Visits	Nights	Visits	Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights
Topline	Overnight visits	26,930	101,610	28,629	96,116	18,790	17,700	84,940	14,750	67,400	-48%	-30%	-17%	-21%		
	Day visits	3,800		2,630		490	1,480		2,710		3%		83%			
		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	Visits	Nights
Purpose of visit	<b>Total Leisure visits</b>	<b>12,580</b>		<b>12,640</b>		<b>7,300</b>	<b>4,720</b>		<b>6,990</b>		<b>-45%</b>		<b>48%</b>			
	- Overnight visits	10,810	34,490	11,510	31,820	7,150	4,130	13,880	4,770	18,130	-59%	-43%	15%	31%		
	- Day visits	1,770		1,120		150	590		2,220		97%		278%			
	<b>Total Business visits</b>	<b>5,460</b>		<b>4,800</b>	<b>0.15</b>	<b>2,050</b>	<b>3,930</b>		<b>2,690</b>		<b>-44%</b>		<b>-31%</b>			
	- Overnight visits	3,910	15,330	3,930	16,260	1,800	3,590	12,350	2,500	10,510	-36%	-35%	-30%	-15%		
	- Day visits	1,550		870		250	340		200		-77%		-43%			
	<b>Total VFR visits</b>	<b>9,940</b>		<b>9,610</b>	<b>0.31</b>	<b>7,930</b>	<b>9,810</b>		<b>7,210</b>		<b>-25%</b>		<b>-27%</b>			
	- Overnight visits	9,790	45,670	9,450	39,930	7,900	9,740	58,210	7,040	37,560	-26%	-6%	-28%	-35%		
	- Day visits	150		160		30	70		170		4%		145%			
	<b>Total Other visits</b>	<b>2,750</b>		<b>4,210</b>	<b>0.13</b>	<b>2,000</b>	<b>730</b>		<b>570</b>		<b>-86%</b>		<b>-21%</b>			
- Overnight visits	2,430	6,110	3,740	8,110	1,940	250	500	450	1,200	-88%	-85%	84%	139%			
- Day visits	320		470		60	480		120		-75%		-75%				
Country of residence	UK	21,300	78,020	21790	70600		14,530	64,620	12,680	55,330	-42%	-22%	-13%	-14%		
	Other CI	3,260	5,710	4000	6980		1,960	3,450	1,460	2,450	-64%	-65%	-26%	-29%		
	Ireland	170	1,040	110	580		110	520	150	1,960	32%	239%	32%	281%		
	France	4,220	6,460	4270	9730		1,670	4,370	2,650	3,110	-38%	-68%	59%	-29%		
	Germany	40	350	20	50		50	120	60	300	176%	459%	29%	144%		
	Other	1,750	10,030	1060	8160		870	11,870	460	4,250	-56%	-48%	-47%	-64%		
Mode of departure	Scheduled air	25,060	87,030	25880	81760		15,380	68,540	13,860	58,300	-46%	-29%	-10%	-15%		
	Scheduled ferry	5,290	14,050	4990	13920		3,450	16,050	3,270	8,770	-34%	-37%	-5%	-45%		
	Private plane	320	320	330	330		340	340	300	300	-11%	-11%	-13%	-13%		
	Visiting yachtsmen	60	210	60	110		10	10	30	30	-57%	-73%	117%	142%		
	Cruise passengers	0	0	0	0		0	0	0	0	0%	0%	0%	0%		
Duration of stay	Day visits	3,800	0	2,630	0		1,480	0	2,710	0	3%		83%			
	1-3 nights	16,630	34,430	19860	40210		9,410	19,060	7,880	16,070	-60%	-60%	-16%	-16%		
	4 - 6 nights	6,340	28,390	5630	25320		4,390	20,540	4,700	18,700	-16%	-26%	7%	-9%		
	7 nights	1,890	12,930	1370	9570		1,730	12,110	1,380	9,360	1%	-2%	-20%	-23%		
	8+ nights	2,070	25,640	1770	21020		2,170	33,230	1,460	23,260	-18%	11%	-33%	-30%		

**Table A2: Year to date - January to December 2017 to 2023**

Year to date		3-year average 2017 to 2019		2019		2021		2022		2023		Change 23/19		Change 23/22	
Total passengers		1,178,270		1,193,510		379,758		869,820		990,020		-17%		14%	
Total visits		733,740		770,690		236,220		475,830		526,520		-32%		11%	
		Visits	Nights	Visits	Nights	Visits		Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights
	Overnight visits	622,700	2,775,030	645,547	2,737,631	228,400		443,880	2,183,940	480,110	2,268,330	-26%	-17%	8%	4%
	Day visits	111,040		125,140		7,820		31,950		46,410		-63%		45%	
		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 Leisure visits</b>	<b>495,050</b>		<b>514,620</b>		<b>147,060</b>		<b>284,100</b>		<b>321,720</b>		<b>-37%</b>		<b>13%</b>	
	- Overnight visits	423,890	1,914,660	439,150	1,918,290	142,200		264,380	1,329,850	287,710	1,332,420	-34%	-31%	9%	0.2%
	- Day visits	71,160		75,470		4,860		19,710		34,010		-55%		72%	
	<b>Total Business visits</b>	<b>73,540</b>		<b>66,110</b>		<b>21,200</b>		<b>54,050</b>		<b>56,500</b>		<b>-15%</b>		<b>5%</b>	
	- Overnight visits	55,910	193,000	50,050	138,810	19,130		47,310	151,060	50,150	167,850	0%	21%	6%	11%
	- Day visits	17,630		16,060		3,040		6,730		6,350		-60%		-6%	
	<b>Total VFR visits</b>	<b>107,410</b>		<b>112,950</b>		<b>56,360</b>		<b>110,020</b>		<b>117,370</b>		<b>4%</b>		<b>7%</b>	
	- Overnight visits	105,810	540,540	110,730	544,560	55,870		109,090	627,840	115,930	674,210	5%	24%	6%	7%
	- Day visits	1,600		2,220		490		940		1,440		-35%		53%	
<b>Total Other visits</b>	<b>57,740</b>		<b>77,020</b>		<b>11,600</b>		<b>27,670</b>		<b>30,940</b>		<b>-60%</b>		<b>12%</b>		
- Overnight visits	37,080	126,680	45,620	135,980	11,200		23,320	75,190	26,310	93,860	-42%	-31%	13%	25%	
- Day visits	20,660		31,390		400		4,350		4,630		-85%		6%		
Country of residence	UK	472,290	2,137,490	493,990	2,146,870			359,240	1,730,900	373,910	1,764,000	-24%	-18%	4%	2%
	Other CI	50,940	81,790	59,740	94,490			28,820	60,680	33,430	74,680	-44%	-21%	16%	23%
	Ireland	9,000	48,630	8,250	45,900			7,420	42,810	7,570	43,070	-8%	-6%	2%	1%
	France	128,460	159,810	135,550	138,940			40,300	103,090	74,830	134,320	-45%	-3%	86%	30%
	Germany	19,970	103,800	20,950	95,750			15,980	75,930	11,980	69,120	-43%	-28%	-25%	-9%
	Other	53,070	243,500	52,200	215,690			24,070	170,520	24,800	183,140	-52%	-15%	3%	7%
Mode of departure	Scheduled air	505,230	2,210,920	534,640	2,244,740			355,370	1,675,640	376,390	1,767,780	-30%	-21%	6%	5%
	Scheduled ferry	201,870	518,510	208,360	444,020			102,410	481,890	131,130	464,700	-37%	5%	28%	-4%
	Private plane	4,620	4,620	5,480	5,480			5,530	5,530	4,930	4,930	-10%	-10%	-11%	-11%
	Visiting yachtsmen	18,220	40,970	18,580	43,370			10,200	20,870	13,760	30,920	-26%	-29%	35%	48%
	Cruise passengers	3,800	0	3,630	0			2,330	0	310	0	0%		0%	
Duration of stay	Day visits	111,040		125,140	0			31,960		46,720		-63%		46%	
	1-3 nights	285,110	634,020	312,130	697,210			188,220	420,240	226,070	500,590	-28%	-28%	20%	19%
	4 - 6 nights	189,200	853,420	188,070	851,590			136,780	634,660	139,780	639,800	-26%	-25%	2%	1%
	7 nights	103,170	707,240	105,630	726,590			77,820	544,770	73,670	515,370	-30%	-29%	-5%	-5%
	8+ nights	45,220	580,130	39,720	462,250			41,050	584,260	40,960	612,560	3%	33%	0%	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.