



## January 2024 - Monthly Exit Survey Results

This methodology for these statistics is modelled on the International Passenger Survey conducted by the UK Office for National Statistics. Passengers are selected randomly to take part in face to face interviews as they are leaving Jersey's ports. There are two elements; the Passenger Calibration Survey and the more comprehensive Visitor Exit Survey.

This report is for the Passenger Calibration Survey which reflects a short set of questions designed to break down (or calibrate) departing passengers. This short survey provides a profile of passengers leaving Jersey e.g. the proportion that are tourism visitors vs the proportion who are residents travelling off-island.

Throughout this report, annual figures for 2024 are compared with 2023 to present annual change and with 2019, as the latter reflects the most recent year in which travel was not impacted by the Covid-19 pandemic and is still being used as a benchmark year for the travel industry.

Survey fieldwork ceased to be implemented in March 2020 due to the start of Covid-19 and the significant impact it had on travel. Survey research was not able to commence again until early 2022.

All figures in this report have been rounded independently to the nearest 10 and so the figures in columns and rows may not always sum exactly to total figures presented in the tables or graphs. For more information about data collection see the methodology section at the end of this report.

### January 2024 compared to January 2019

- The total number of **departing passengers**<sup>1</sup> from Jersey was **39,240**, recovering to 79% of 2019 levels.
- Of all departing passengers, 37% were **tourism visitors**<sup>2</sup> who had reached the end of their stay in Jersey (**14,200**) reflecting a similar proportion to in the previous year but a lower proportion than that seen in 2019 when visitors accounted for almost half (47%) of all departing passengers.
- At **610**, the number of day visitors was its lowest recorded in this period since at least

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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.

<sup>2</sup> Tourism visits include any non-resident visitors to Jersey who may have stayed in Jersey for up to a year. Those visiting for leisure, business, study, sport or visiting friends or family are all classified as tourism visits, but seasonal or longer-term workers are excluded.

2017, reflecting 18% recovery compared to 2019 when the number of day visits surpassed 3,000.

- The **average length of stay ('ALS')** was **5.2 nights** for those visitors staying for at least one night, significantly longer than that recorded in 2019 when it was 3.9.
- The longer average length of stay has resulted in a recovery of visitors nights (total number of nights spent by all visitors to Jersey) to **71,240** reflecting a 84% recovery.
- Breaking the visitor numbers down by main **purpose of visit**:
  - **leisure visits** accounted for 26% of all visits at 3,720 a similar proportion to that recorded in 2019 when they accounted to 28%.
  - **business** visits accounted for 21% of visits at 2,980
  - **visits to friends and family** accounted for almost half (45%) of visits at 6,320
- The total number of leisure visits recovered to around half 53% of levels seen in January 2019; the number of visitor nights spent by holiday makers recovered to a similar level (51% of Jan 2019).
- The total number of business visitors did not show the same strong recovery observed across 2023; in Jan 2024 the number of business visitors was at 38% of 2019 levels; after a peak in the ALS for business visitors recorded in 2023, the ALS for this visitor type (2.8 nights) returned to a level similar that observed before the pandemic.
- The number of visits to see friends and relatives recovered to 89% of 2019 levels; the average length of stay for these visitors continues to be around 1 night longer on average than that seen in 2019.
- Breaking the visitor numbers down by **travel method**:
  - 95% of visitors travelled via **scheduled air** routes (13,470), recovering to 58% of 2019 levels
  - 3% of visitors travelled via **scheduled ferry** services (480), recovering to 31% of 2019 levels
- Breaking visitor numbers down by **country of residence**:
  - 84% of visitors were from the **UK** (11,890)
  - 7% of visitors were from the **other Channel Islands** (970)
  - 1% of visitors were from **France** (190)
- Visitors from the UK (who stayed at least one night) stayed on average 4.5 nights. This

compares to an ALS of 2.4 nights for visitors from the other Channel Islands and 15.0 nights for visitors from other countries (which includes visitors from Portugal, Madeira, Poland, etc.)

- In January, the shorter stay market was most prominent with almost half (49%) of all visitors staying for 1 to 3 days and a further quarter (27%) staying for 4 to 6 days.
  - When compared to 2019, the day trip market has seen the slowest recovery; in January 2024, the day trip market was at 18% of the level recorded in the same period of 2019. In comparison, the longer stay market was similar to before the pandemic (recovery to 95% of 2019 levels).
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## January 2024 compared to January 2023

- The total number of **departing passengers** increased marginally by 5% compared with the same period of 2022.
- The number of **departing visitors** remained relatively consistent (+2%).
- The number of visitors staying for at least one night increased by 5% on annual basis whilst the day trip market decreased by 41%; the day trip market accounted for 4% of all visits in January 2024.
- The **average length of stay** (for those visitors staying for at least one night) decreased marginally from 5.4 nights in 2023 to 5.2 nights in 2024; the total number of visitor nights remained relatively unchanged (+2%).
- The number of leisure visitors in January 2023 increased significantly by 80% on an annual basis and the number of visitor nights almost doubled (+95%).
- In comparison, the number of business visitors decreased by around a quarter (-28%) on an annual basis; this coupled with a fall in ALS for this visitor type (from 3.4 nights in Jan 2023 to 2.8 night in Jan 2024) has seen the number of visitors nights decrease by more than a third.
- The number of visitors travelling to Jersey to see friends and family and the number of visitor nights have fallen marginally in the latest year (-6% and -7% since Jan 2023 respectively).
- The **UK market** has shown a 7% increase when compared with the same period of 2023; the number of UK visitor nights increased by 26%.
- Visits made on scheduled air routes increased minimally by +3% whilst the number of visits made on scheduled sea routes fell by more than a quarter (-29%).

**Table A1: January 2017 to January 2024**

January		3-year average 2017 to 2019		2019		2021		2022		2023		2024		Change 24/19		Change 24/23	
Total passengers		48,050		49,900		3,040		26,440		37,350		39,240		-21%		5%	
Total visits		21,860		25,130		410		11,730		13,970		14,200		-44%		2%	
		Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights
Topline	Overnight visits	19,040	81,660	21,692	84,526			10,580	46,600	12,940	70,000	13,590	71,240	-37%	-16%	5%	2%
	Day visits	2,820		3,440				1,150		1,030		610		-82%		-41%	
	ALS	4.3		3.9				4.4		5.4		5.2					
		3-year average 2017 to 2019		2019		2021		2022		2023		2024		Change 23/19		Change 23/22	
		Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights
Purpose of visit	<b>Total Leisure visits</b>	<b>5,600</b>		<b>7,030</b>		<b>0</b>		<b>2,990</b>		<b>2,060</b>		<b>3,720</b>		<b>-47%</b>		<b>80%</b>	
	- Overnight visits	5,330	19,380	6,780	26,830	0		2,910	9,780	1,990	6,970	3,620	13,590	-47%	-49%	83%	95%
	- Day visits	280		250		0		80		80		100		-60%		24%	
	- ALS	3.6		4.0				3.4		3.5		3.7					
	<b>Total Business visits</b>	<b>7,410</b>		<b>7,730</b>		<b>140</b>		<b>4,230</b>		<b>4,160</b>		<b>2,980</b>		<b>-62%</b>		<b>-28%</b>	
	- Overnight visits	5,200	14,840	5,150	11,450	140		3,340	9,580	3,400	11,680	2,650	7,320	-48%	-36%	-22%	-37%
	- Day visits	2,210		2,590		0		890		760		320		-88%		-57%	
	- ALS	2.9		2.2				2.9		3.4		2.8					
	<b>Total VFR visits</b>	<b>6,780</b>		<b>7,120</b>		<b>270</b>		<b>4,130</b>		<b>6,710</b>		<b>6,320</b>		<b>-11%</b>		<b>-6%</b>	
	- Overnight visits	6,630	43,240	6,740	42,540	270		4,070	26,470	6,670	48,940	6,280	45,300	-7%	6%	-6%	-7%
	- Day visits	150		390		0		60		40		40		-90%		-5%	
	- ALS	6.5		6.3		6.5		6.5		7.3		7.2					
	<b>Total Other visits</b>	<b>2,070</b>		<b>3,250</b>		<b>0</b>		<b>380</b>		<b>1,050</b>		<b>1,180</b>		<b>-64%</b>		<b>13%</b>	
- Overnight visits	1,890	4,190	3,030	3,710	0		260	770	890	2,410	1,030	5,030	-66%	35%	16%	109%	
- Day visits																	
- ALS	2.2		1.2		3.0		3.0		2.7		4.9						
Country of residence	<b>UK</b>	<b>16,900</b>		<b>18,840</b>				<b>10,190</b>	<b>0</b>	<b>11,140</b>	<b>0</b>	<b>11,890</b>	<b>0</b>	<b>-37%</b>	<b>0%</b>	<b>7%</b>	<b>0%</b>
	- Overnight visits		62,660		68,580				39,270		49,460		52,340	-24%		6%	
	- Day visits											300					
	- ALS											4.5					
	<b>Other CI</b>	<b>2,450</b>		<b>4,070</b>				<b>550</b>	<b>0</b>	<b>1,330</b>	<b>0</b>	<b>970</b>	<b>0</b>	<b>-76%</b>	<b>0%</b>	<b>-27%</b>	<b>0%</b>
	- Overnight visits		2,490		3,690				770		1,950		1,700	-54%		-13%	
	- Day visits											270					
	- ALS											2.4					
	<b>Ireland</b>	<b>170</b>		<b>60</b>				<b>80</b>	<b>0</b>	<b>100</b>	<b>0</b>	<b>90</b>	<b>0</b>	<b>61%</b>	<b>0%</b>	<b>-4%</b>	<b>0%</b>
	- Overnight visits		1,520		210				340		270		620	195%		132%	
	- Day visits											0					
	- ALS																
	<b>France</b>	<b>940</b>		<b>550</b>				<b>360</b>	<b>0</b>	<b>150</b>	<b>0</b>	<b>190</b>	<b>0</b>	<b>-65%</b>	<b>0%</b>	<b>30%</b>	<b>0%</b>
- Overnight visits		3,420		1,510				1,490		940		1,450	-4%		53%		
- Day visits											30						
- ALS																	
<b>Germany</b>	<b>50</b>		<b>30</b>				<b>10</b>	<b>0</b>	<b>50</b>	<b>0</b>	<b>80</b>	<b>0</b>	<b>177%</b>	<b>0%</b>	<b>69%</b>	<b>0%</b>	
- Overnight visits		370		220				30		380		590	170%		57%		
- Day visits											0						
- ALS																	
<b>Other</b>	<b>1,350</b>		<b>1,600</b>				<b>540</b>	<b>0</b>	<b>1,220</b>	<b>0</b>	<b>970</b>	<b>0</b>	<b>-39%</b>	<b>0%</b>	<b>-20%</b>	<b>0%</b>	
- Overnight visits		11,570		10,530				4,700		17,000		14,540	38%		-14%		
- Day visits											0						
- ALS											15.0						
Mode of departure	Scheduled air	19,750	70,980	23,250	78,060			10,630	40,260	13,050	65,020	13,470	65,990	-42%	-15%	3%	1%
	Scheduled ferry	1,880	10,440	1,540	6,090			800	6,020	680	4,720	480	4,970	-69%	-18%	-29%	5%
	Private plane	200	200	330	330			280	280	230	230	220	220	-32%	-32%	-5%	-5%
	Visiting yachtsmen	30	40	30	50			20	40	20	20	30	50	-4%	16%	73%	189%
	Cruise passengers	0	0	-	-			0	0	0	0	0	0				
Duration of stay	Day visits	2,820		3,440	-			1,150		1,030		610		-82%		-41%	
	1-3 nights	11,150	20,950	12,720	23,080			6,510	13,540	7,330	14,620	6,970	14,740	-45%	-36%	-5%	1%
	4 - 6 nights	4,980	22,480	5,540	25,100			2,310	10,410	2,660	12,260	3,770	17,050	-32%	-32%	41%	39%
	7 nights	770	5,390	1,280	8,970			450	3,150	710	4,970	790	5,530	-38%	-38%	11%	11%
	8+ nights	2,140	32,840	2,160	27,370			1,310	19,500	2,240	38,140	2,060	33,910	-5%	24%	-8%	-11%

## Methodology notes

Survey fieldwork ceased to be implemented in March 2020 due to the start of Covid-19 and the significant impact it had on travel. Survey research was not able to commence again until early 2022. Following the survey cessation, passenger numbers continued to be tracked; figures showed that the Covid-19 pandemic significantly impacted travel to and from the island throughout 2020, 2021 and early 2022. According to data provided by Ports of Jersey and Condor Ferries, passenger arrivals in Jersey during the first year of the pandemic (2020) were at around a fifth (21%) of the level recorded in 2019. 4insight took over the project, and full launched in March 2022.

Due to the Covid situation that was ongoing throughout 2020 and 2021, the Exit Survey did not run during those years.

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.