

August 2022 Monthly Exit Survey Results Commentary

The Exit Survey is an important tool that tracks visitor performance and contributes to Visit Jersey's analysis of how the visitor economy is recovering. 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 Government of Jersey's travel registration forms.

August summary

August 2022 compared to August 2021

- Total visits have increased by 53% in August 2022 compared to August 2021.
- Total holiday visits in August 2022 increased by 57% compared to August 2021 with overnight holiday visits up by 45%.

August 2022 compared to August 2019:

- There was a total of 122,670 **departing passengers**¹ from Jersey, reflecting three-quarters (74%) of the level recorded in August 2019.
- Of all departing passengers, 64% were visitors (78,950).
- The number of **visits lasting at least one night** was 72,030 resulting in a **total number of nights** spent by visitors in Jersey of 439,530; the total number of nights spent by visitors in Jersey reflects a recovery to 83% of that recorded in August 2019.
- The **average length of stay** was 6.1 nights (for those visitors staying for at least one night), reflecting the longest average stay recorded since at least 2017 and almost 1 day longer than the average length of stay recorded in August 2019 (5.3 nights).
- Breaking the visitor numbers down by main **purpose of visit**:
 - **holiday** visits accounted for 73% of visits at 57,380
 - **business** visits accounted for 3% of visits at 2,710
 - **visits to friends and relatives** accounted for 23% of visits at 17,770
- The VFR (visiting friends and relatives) and business markets have shown strong recovery in 2022, returning to very similar levels to those recorded in August 2019 (-3% and -2% respectively).

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 nights spent in Jersey by business visitors increased significantly (+78%) in the latest month due to a large increase in the average length of stay for this visitor type.
- Overnight holiday visits have recovered to 65% of 2019 levels, whereas day visits for holiday purposes (recovered to 26% of 2019 levels) continue to be impacted more significantly. This is largely driven by a significant decline in the number of French day visits. Taking this into account, total holiday visits recorded during August have returned to 55% of the level seen in August 2019.
- Breaking the visitor numbers down by **travel method**:
 - 63% of visitors travelled via **scheduled air** routes (49,930), recovering to 68% of 2019 levels
 - 31% of visitors travelled via **scheduled ferry** services (24,210), recovering to 52% of 2019 levels
- Breaking visitor numbers down by **country of residence**:
 - 73% of visitors were from the **UK** (57,930) recovering to just over three quarters (78%) of 2019 levels.
 - 12% of visitors were from **France** (9,140) reflecting 32% of 2019 levels.
 - 5% of visitors were from **Germany** (4,010) recovering to 72% of 2019 levels.
 - 3% of visitors were from **other Channel Islands** (2,010) recovering to two-fifths (39%) of 2019 levels.

Year-to-date summary

The UK Office of National Statistics (“ONS”) has published data collected from the International Passenger Survey (“IPS”)², although they have only published the data up to May 2022 currently³. Comparing Jersey’s Exit Survey data (total visits) to the IPS data (total overseas visits) between January – May and comparing this to 2019 levels, the recovery of Jersey’s visitor market is on par with the UK at -40% on 2019 levels in the UK compared to -43% in Jersey.

Additionally, if we look at a macro level at the UNWTO World Tourism Barometer, they are reporting that international tourist arrivals had recovered to 57% of pre-pandemic levels for January to July 2022. Although this is referencing arrivals, it is an indication of the general recovery within the industry. In Jersey, looking at the same period, total visitor volumes had recovered to 60% of pre-pandemic levels (comparing to 2019), and were therefore on par

² https://www.visitbritain.org/sites/default/files/vb-corporate/ips_summary_may_2022_20th_september_2022.pdf

³ Please note that because the ONS were unable to interview travellers at Eurotunnel during the first 5 months of 2022, the UK data excludes the Eurotunnel data from 2019 so they can directly compare to the 2022 dataset.

with the global market trend⁴.

January - August 2022 compared to January - August 2021

Comparing the first 8 months of 2022 to the same period during 2021:

- there have been over double the volume of total visits, reflecting an increase of 162%.
- looking at each of the visit purpose categories individually, visits for each category have increased by over 100%, with total holiday visits up by 163% reflecting a promising start to the post-covid recovery of the tourism industry.

January – August 2022 compared to January - August 2019

- Total **departing passengers** have recovered to 70% of 2019 levels (592,400)
- The number of **departing visitors** has recovered to 60% of 2019 levels (337,610)
- The **average length of stay** (for those visitors staying for at least one night) has increased from 4.4 nights in 2019 to 5.0 nights in 2022 resulting in the total number of nights spent in Jersey recovering to 78% of previous levels (1,571,360).
- The **number of visitors** from the UK and Ireland have shown a good level of recovery so far in 2022, with each market recovering to around three-quarters of levels seen in 2019.
- The German market has also shown a strong recovery to over two-thirds (68%) of previous levels.
- Into August, the French market continues to show the slowest recovery at just over a quarter (29%) of 2019 levels, largely due to reduced capacity on the French sea routes and Brexit-related issues due to passports now being required for travel to Jersey.
- Focusing on visit purpose, the VFR market is performing well and has recovered to 92% of 2019 levels. Business visits have recovered to four-fifths (79%) of 2019 levels and the holiday market has recovered to 55% of 2019 levels.
- Looking at the proportions of visits for each **visit purpose** over the first 8 months of the year:
 - **holiday** visits accounted for 63% of visits at 212,000
 - **business** visits accounted for 10% of visits at 33,540
 - **visits to friends and relatives** accounted for 21% of visits at 72,300.

⁴ <https://www.unwto.org/news/international-tourism-back-to-60-of-pre-pandemic-levels-in-january-july-2022>

Table A1: August 2017 to 2022

August		<u>2017</u>		<u>2018</u>		<u>2019</u>		<u>2021</u>		<u>2022</u>		<u>Change 22/19</u>		<u>Change 22/21</u>
Total passengers		157,340		161,770		165,400		81,430		122,670		-26%		51%
Total visits		114,230		117,500		127,570		51,510		78,950		-38%		53%
Topline	Overnight visits	93,950	490,860	98,340	507,720	99,930	527,060	49,590	72,030	439,530	-28%	-17%	45%	
	Day visits	20,280		19,160		27,650		1,920	6,920		-75%		260%	
		<u>3-year average 2017 to 2019</u>				<u>2019</u>		<u>2021</u>		<u>2022</u>		<u>Change 22/19</u>		<u>Change 22/21</u>
		Visits		Nights		Visits	Nights	Visits	Visits	Nights	Visits	Nights	Visits	
Purpose of visit	Total Holiday visits	97,820		103,970		36,520		57,380		-45%		57%		
	- Overnight visits	77,140	392,840	77,970	399,260	35,000	50,730	295,760	-35%	-26%	45%			
	- Day visits	20,680		26,000		1,520	6,650		-74%		338%			
	Total Business visits	4,040		2,760		1,840		2,710		-2%		47%		
	- Overnight visits	3,070	11,150	1,920	5,600	1,660	2,490	9,980	29%	78%	50%			
	- Day visits	980		840		180	220		-73%		22%			
	Total VFR visits	15,320		18,270		12,450		17,770		-3%		43%		
	- Overnight visits	15,180	95,920	18,270	113,730	12,330	17,710	123,040	-3%	8%	44%			
	- Day visits	140		0		120	50		100%		-58%			
	Total Other visits	2,590		2,580		700		1,100		-57%		57%		
- Overnight visits	2,020	8,630	1,770	8,470	600	1,100	10,750	-38%	27%	83%				
- Day visits	570		810		100	0		-100%		-100%				
Country of residence	UK	72,000	395,300	74,640	410,140		57,930	345,920	-22%	-16%				
	Other CI	5,090	8,950	5,120	9,750		2,010	4,720	-61%	-52%				
	Ireland	2,020	12,430	2,330	16,500		1,200	9,070	-48%	-45%				
	France	27,180	36,040	28,230	29,000		9,140	24,090	-68%	-17%				
	Germany	4,570	19,590	5,550	19,190		4,010	18,260	-28%	-5%				
	Other	8,900	36,240	11,710	42,500		4,660	37,480	-60%	-12%				
Mode of departure	Scheduled air	69,840	376,030	73,780	407,460		49,930	304,440	-32%	-25%				
	Scheduled ferry	42,480	120,150	46,390	107,720		24,210	127,500	-48%	18%				
	Private plane	450	450	530	530		630	630	20%	20%				
	Visiting yachtsmen	5,350	11,910	5,410	11,360		3,340	6,960	-38%	-39%				
	Cruise passengers	1,650	0	1,470	0		840	0	-43%					
Duration of stay	Day visits	22,360		27,650			6,920		-75%					
	1-3 nights	30,880	68,020	30,550	72,320		19,390	44,630	-37%	-38%				
	4 - 6 nights	30,390	137,880	31,240	144,240		23,690	110,560	-24%	-23%				
	7 nights	25,160	170,750	27,550	187,990		17,870	125,080	-35%	-33%				
	8+ nights	10,980	131,890	10,580	122,510		11,090	159,250	5%	30%				

Table A2: Cumulative data – January to August 2017 to 2022

Year-to-date		2017		2018		2019		2021		2022		Change 22/19		Change 22/21			
Total passengers		815,760		823,440		840,350		195,660		592,400		-30%		203%			
Total visits		523,510		506,550		561,420		128,740		337,610		-40%		162%			
		Visits	Nights	Visits	Nights	Visits	Nights	Visits	Visits	Nights	Visits	Nights	Visits				
Topline	Overnight visits	444,110	2,117,550	423,920	1,939,090	462,740	2,019,630	125,090	314,780	1,571,360	-32%	-22%	152%				
	Day visits	79,400		82,630		98,680		3,650		22,830		-77%		525%			
		3-year average 2017 to 2019				2019		2021		2022		Change 22/19		Change 22/21			
		Visits		Nights		Visits		Nights		Visits		Nights		Visits			
Purpose of visit	Total Holiday visits	368,460		383,440		80,630		212,000		-45%		163%					
	- Overnight visits	311,900		1,439,530		324,850		1,458,470		77,990		196,700		1,003,180	-39%	-31%	152%
	- Day visits	56,560				58,590		2,640		15,290					-74%	479%	
	Total Business visits	46,960		42,690		7,580		33,540		-21%		342%					
	- Overnight visits	35,680		125,790		31,170		91,020		7,070		29,330		93,000	-6%	2%	315%
	- Day visits	11,280				11,520		510		4,210					-63%	725%	
	Total VFR visits	72,460		78,560		36,030		72,300		-8%		101%					
	- Overnight visits	71,530		380,930		76,970		399,430		35,730		71,590		418,490	-7%	5%	100%
	- Day visits	930				1,590		300		710					-56%	137%	
	Total Other visits	42,610		56,730		4,500		19,780		-65%		340%					
- Overnight visits	24,470		79,020		29,760		70,710		4,300		17,160		56,660	-42%	-20%	299%	
- Day visits	18,140				26,980		200		2,610					-90%	1205%		
Country of residence	UK	329,540		1,537,270		349,260		1,565,090		253,490		1,253,150		-27%	-20%		
	Other CI	34,390		52,170		41,750		61,880		19,450		41,460		-53%	-33%		
	Ireland	6,700		37,270		6,930		39,430		5,130		30,080		-26%	-24%		
	France	101,840		125,550		105,110		104,560		30,150		76,490		-71%	-27%		
	Germany	16,000		80,670		17,870		82,560		12,070		57,050		-32%	-31%		
	Other	42,030		192,490		40,490		166,120		17,320		113,080		-57%	-32%		
Mode of departure	Scheduled air	350,600		1,590,830		376,800		1,638,510		246,870		1,186,120		-34%	-28%		
	Scheduled ferry	157,500		394,630		161,090		337,370		75,630		362,340		-53%	7%		
	Private plane	3,020		3,020		3,830		3,830		3,870		3,870		1%	1%		
	Visiting yachtsmen	16,160		36,940		16,700		39,900		9,210		19,020		-45%	-52%		
	Cruise passengers	3,210		0		3,000		0		2,030		0		-32%	0%		
Duration of stay	Day visits	86,900				98,680				22,830				-77%			
	1-3 nights	193,130		431,080		211,910		473,830		128,560		287,330		-39%	-39%		
	4 - 6 nights	137,680		619,030		138,860		627,160		97,710		452,830		-30%	-28%		
	7 nights	78,600		536,680		80,640		553,470		58,250		407,700		-28%	-26%		
	8+ nights	34,180		438,630		31,330		365,170		30,250		423,470		-3%	16%		

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). Figures for January have been calculated based on rounded estimates (to two decimal places) and so the breakdown of visitors and visitor nights may not equal the total figures exactly in Table A2.