July 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.

July summary

The number of passengers and tourism visits to Jersey recorded in July has seen the greatest recovery compared to pre-Covid-19 (2019) levels observed since the Exit Survey recommenced at the start of 2022.

July 2022 compared to July 2021

- Total visits have increased by 63% in July 2022 compared to July 2021.

- Total holiday visits in July 2022 increased by 80% compared to July 2021 with overnight holiday visits up by 75%.

July 2022 compared to July 2019:

- There was a total of 111,380 **departing passengers**[1] from Jersey, reflecting four-fifths (78%) of the level recorded in July 2019.

- The number of **overnight visits** (i.e. visits lasting at least one night) was 60,140 resulting in a **total number of nights** spent by visitors in Jersey of 328,580; the total number of nights spent in Jersey reflects 81% of the level recorded in 2019.

- The **average length of stay** was 5.5 nights (for those visitors staying for at least one night), compared to an average of 4.8 nights recorded in July 2019. The average length of stay has been consistently higher (compared to the same period of 2019) in each of the last five months.

- The total number of **tourism visits**[2] was **63,770**, reflecting two-thirds (66%) of the level recorded in July 2019.

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

  - **holiday** visits accounted for 73% of visits at 46,740

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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.

[2] 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.

- **business** visits accounted for 6% of visits at 3,920

- **visits to friends and family** accounted for 19% of visits at 11,880

- The VFR market (visiting friends and relatives) has shown the strongest recovery in 2022, with the number of visits recorded in July reflecting 87% of that recorded in July 2019.

- Business visits have returned to four-fifths (80%) of the level seen in July 2019.

- Total holiday visits recorded during July have returned to 64% of the level seen in July 2019; day visits for holiday purposes (recovered to 35% of 2019 levels) continue to be impacted more significantly than overnight visits (recovered to 68% of 2019 levels), largely driven by a significant decline in the number of French day visits.

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

  - 71% of visitors travelled via **scheduled air** routes (44,980)

  - 22% of visitors travelled via **scheduled ferry** services (13,760)

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

  - 75% of visitors were from the **UK** (47,710) recovering to four fifths (82%) of 2019 levels.

  - 9% of visitors were from **France** (5,560) reflecting 28% of 2019 levels.

  - 4% of visitors were from **Germany** (2,370) recovering to nearly two thirds (63%) of 2019 levels.

  - 4% of visitors were from **other Channel Islands** (2,520) recovering to over half (58%) of 2019 levels

Year-to-date summary

2022 is a transitional year for the recovery of tourism worldwide, with multiple factors impacting the global travel industry, including the rising cost of living, the war in Ukraine and widespread travel disruption. In addition, the emergence of the Omicron variant impacted the start of the year to a great extent, with Jersey's border restrictions not being fully lifted until 7 February and widespread consumer uncertainty around forward bookings.

The UK Office of National Statistics ("ONS") has published data collected from the International Passenger Survey ("IPS")[3], although they have only published the data up to

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[3] https://www.visitbritain.org/sites/default/files/vb-corporate/ips_summary_may_2022_20th_september_2022.pdf

May 2022 currently[4].

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 largely on par with the UK at -40% on 2019 levels in the UK compared to -43% in Jersey.

January - July 2022 compared to January - July 2021

Comparing the first 7 months of 2022 to the same period during 2021:

- there have been over 3 times as many visits in total, reflecting an increase of 235%.

- looking at each of the visit purpose categories individually, visits for each category have increased by over 100%, with total holiday visits up by 251% reflecting a promising start to the post-covid recovery of the tourism industry.

January - July 2022 compared to January - July 2019

- Total **departing passengers** have recovered to 70% of 2019 levels (469,730)

- The number of **departing visitors** has recovered to 60% of 2019 levels (258,650)

- The **average length of stay** (for those visitors staying for at least one night) has increased from 4.1 nights in 2019 to 4.7 nights in 2022 resulting in the total number of nights spent in Jersey recovering to 76% of previous levels.

- The **number of visitors** from Ireland (although a small proportion of the visitors overall compared to other markets) is recovering well to 85% 2019 levels for the same period.

- The UK and German markets are also showing a good level of recovery, with the UK recovering to nearly three quarters of 2019 levels and the German market recovering to around two thirds.

- Into July, the French market continues to be the slowest to recover at just over a quarter of 2019 levels, largely due to the capacity and Brexit issues noted above.

- Focusing on visit purpose the VFR market is performing well and has recovered to 90% of 2019 levels. Business visits have recovered to over three quarters of 2019 levels. The holiday market has recovered to over 50% of 2019 levels.

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[4] 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.

Table A1: July 2017 to 2022

July	2017	2018	2019	2021	2022	Change 22/19	Change 22/21
Total passengers	141,600	141,420	143,200	50,890	111,380	-22%	119%
Total visits	98,470	93,750	97,340	39,210	63,770	-34%	63%

		Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights
Topline	Overnight visits	81,050	435,940	83,420	433,000	84,390	408,090	37,920		60,140	328,580	-29%	-19%	59%	
	Day visits	17,420		10,330		12,950		1,290		3,630		-72%		182%	

		3-year average 2017 to 2019		2019		2022		2022		Change 22/19		Change 22/21	
		Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights
Purpose of visit	**Total Holiday visits**	73,610		72,880		25,990		46,740		-36%		80%	
	- Overnight visits	62,680	322,380	64,270	317,600	25,000		43,690	241,940	-32%	-24%	75%	
	- Day visits	10,920		8,610		990		3,050		-65%		208%	
	Total Business visits	6,100		4,890		1,520		3,920		-20%		158%	
	- Overnight visits	4,820	20,060	3,870	10,750	1,370		3,530	13,080	-9%	22%	158%	
	- Day visits	1,270		1,020		150		390		-62%		162%	
	Total VFR visits	12,400		13,590		10,000		11,880		-13%		19%	
	- Overnight visits	12,310	66,230	13,390	68,040	9,900		11,810	69,840	-12%	3%	19%	
	- Day visits	90		200		100		80		-62%		-24%	
	Total Other visits	4,420		5,990		1,700		1,230		-80%		-28%	
	- Overnight visits	3,140	17,010	2,870	11,690	1,650		1,110	3,720	-61%	-68%	-32%	
	- Day visits	1,280		3,120		50		110		-96%		124%	
Country of residence	UK	59,320	315,360	58,420	304,150			47,710	264,350	-18%	-13%		
	Other CI	4,910	7,680	4,320	6,100			2,520	6,180	-42%	1%		
	Ireland	1,470	8,810	1,420	8,620			1,660	9,940	17%	15%		
	France	17,390	24,260	19,890	28,340			5,560	15,210	-72%	-46%		
	Germany	3,720	20,940	3,750	18,730			2,370	12,390	-37%	-34%		
	Other	9,700	48,620	9,550	42,160			3,960	20,500	-59%	-51%		
Mode of departure	Scheduled air	61,580	327,370	61,900	318,870			44,980	247,680	-27%	-22%		
	Scheduled ferry	29,490	85,920	29,510	74,770			13,760	72,180	-53%	-3%		
	Private plane	500	500	610	610			620	620	2%	2%		
	Visiting yachtsmen	4,710	11,880	4,970	13,840			3,680	8,090	-26%	-42%		
	Cruise passengers	240	0	350	0			730	0	108%	0%		
Duration of stay	Day visits	13,570		12,950				3,630	0	-72%			
	1-3 nights	28,880	62,230	31,510	71,880			19,390	44,120	-38%	-39%		
	4 - 6 nights	24,520	110,830	26,810	121,840			17,570	83,180	-34%	-32%		
	7 nights	19,970	135,510	18,330	125,630			16,280	113,990	-11%	-9%		
	8+ nights	9,590	117,110	7,740	88,750			6,890	87,300	-11%	-2%		

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

Year-to-date	2017	2018	2019	2021	2022	Change 22/19	Change 22/21
Total passengers	658,420	661,670	674,960	114,230	469,730	-30%	311%
Total visits	409,280	389,060	433,840	77,230	258,650	-40%	235%

Topline	Visits	Nights	Visits	Nights	Visits	Nights	Visits	Visits	Nights	Visits	Nights	Visits
Overnight visits	350,150	1,626,690	325,580	1,431,370	362,810	1,492,570	75,500	242,750	1,131,830	-33%	-24%	222%
Day visits	59,120		63,470		71,030		1,730	15,900		-78%		819%

	3-year average 2017 to 2019		2019		2021	2022		Change 22/19		Change 21/22
	Visits	Nights	Visits	Nights	Visits	Visits	Nights	Visits	Nights	Visits
Total Holiday visits	270,630		279,470		44,110	154,620		-45%		251%
- Overnight visits	234,760	1,046,690	246,880	1,059,210	42,990	145,970	707,430	-41%	-33%	240%
- Day visits	35,880		32,600		1,120	8,650		-73%		672%
Total Business visits	42,920		39,940		5,740	30,830		-23%		437%
- Overnight visits	32,620	114,640	29,250	85,430	5,410	26,840	83,020	-8%	-3%	396%
- Day visits	10,300		10,680		330	3,990		-63%		1109%
Total VFR visits	57,150		60,290		23,580	54,530		-10%		131%
- Overnight visits	56,360	285,010	58,700	285,700	23,400	53,880	295,460	-8%	3%	130%
- Day visits	790		1,590		180	650		-59%		263%
Total Other visits	40,020		54,150		3,800	18,680		-66%		391%
- Overnight visits	22,450	70,390	27,990	62,230	3,700	16,060	45,900	-43%	-26%	334%
- Day visits	17,570		26,160		100	2,610		-90%		2514%

Country of residence

	Visits	Nights	Visits	Nights	Visits	Visits	Nights	Visits	Nights
UK	257,530	1,141,970	274,620	1,154,950		195,560	907,230	-29%	-21%
Other CI	29,300	43,230	36,640	52,130		17,440	36,740	-52%	-30%
Ireland	4,670	24,840	4,610	22,940		3,930	21,020	-15%	-8%
France	74,660	89,520	76,880	75,560		21,010	52,410	-73%	-31%
Germany	11,430	61,080	12,320	63,370		8,060	38,790	-35%	-39%
Other	33,130	156,250	28,780	123,630		12,660	75,610	-56%	-39%

Mode of departure

	Visits	Nights	Visits	Nights	Visits	Visits	Nights	Visits	Nights
Scheduled air	280,760	1,214,790	303,020	1,231,050		196,930	881,680	-35%	-28%
Scheduled ferry	115,020	274,480	114,710	229,650		51,420	234,830	-55%	2%
Private plane	2,570	2,570	3,300	3,300		3,240	3,240	-2%	-2%
Visiting yachtsmen	10,810	25,030	11,290	28,550		5,870	12,060	-48%	-58%
Cruise passengers	1,560	0	1,520	0		1,200	0	-22%	0%

Duration of stay

	Visits	Nights	Visits	Nights	Visits	Visits	Nights	Visits	Nights
Day visits	64,540		71,030			15,900		-78%	
1-3 nights	162,250	363,050	181,360	401,510		109,170	242,700	-40%	-40%
4 - 6 nights	107,290	481,150	107,620	482,920		74,030	342,280	-31%	-29%
7 nights	53,440	365,930	53,090	365,480		40,380	282,620	-24%	-23%
8+ nights	23,200	306,740	20,740	242,660		19,170	264,220	-8%	9%

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.