

June 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.

Despite the challenges that the tourism industry continues to face and the transitional nature of 2022, the performance of the visitor economy in Jersey this year reflects strong progress in recovery from 2021 and the latest figures are broadly in line with Visit Jersey's recovery projections. While Jersey's visitor numbers are, like many destinations around the world, still down on 2019 levels, they continue to recover well.

Summary

June 2022 compared to June 2021

- There has been a near doubling in total visits between June 2021 and June 2022.
- Total holiday visits in June 2022 increased by 139% compared to June 2021 with overnight holiday visits up by 125%.

January - June 2022 compared to January - June 2021

Comparing the first 6 months of 2022 to the same period during 2021:

- there have been over 5 times as many visits in total, reflecting an increase of 413%.
- looking at each of the visit purpose categories individually, visits for each category have increased by over 100%, with total holiday visits up by 495% reflecting a promising start to the post-covid recovery of the tourism industry.

June 2022 compared to June 2019

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**")¹, although they have only published the data up to April 2022 currently².

Comparing Jersey's Exit Survey data (total visits) to the IPS data (total overseas visits) between January – April and comparing this to 2019 levels, the recovery of Jersey's visitor

¹ https://www.visitbritain.org/sites/default/files/vb-corporate/ips_summary_jan-apr_2022_v2.pdf

² The ONS were unable to restart interviewing at Eurotunnel due to Covid restrictions, so data for this period excludes travel via this port.

market is largely on par with the UK (and slightly better) at -44% on 2019 levels in Jersey compared to -49% in the UK.

- There was a total of 89,370 **departing passengers**³ from Jersey, reflecting a recovery to nearly three-quarters (71%) of the numbers achieved in 2019.
- The total number of overnight visits (i.e. visits lasting at least one night) recovered to over two thirds (68%) of June 2019 levels. The total number of nights spent by visitors in Jersey was 244,660.
- The average length of stay during June 2022 was 5.1 nights (for those visitors staying for at least one night), compared to an average of 4.6 nights recorded in June 2019. The average length of stay has been consistently higher (compared to the same period of 2019) in each of the last four months.
- The total number of **tourism visits**⁴ was 52,470, reflecting a recovery to nearly three-fifths of June 2019.
- Breaking the visitor numbers down by main **purpose of visit**
 - **holiday** visits accounted for 67% of travel purpose at 35,370.
 - **business** visits accounted for 8% of travel purpose at 4,090.
 - **visits to friends and family** accounted for 19% of travel purpose at 9,890.
- As expected, the VFR market (visiting friends and relatives) is leading the recovery as the travel industry moves forward from the pandemic, with June 2022 reflecting similar volumes to June 2019 (-2%).
- Business visits are back to nearly two thirds of the levels seen in June 2019.
- Total holiday visits during June were down -42% compared to June 2019, with a much larger decrease in holiday day visits (-69%) than overnight holiday visits (-38%), largely driven by the French day visit market. This is due to reduced capacity on the French sea routes and Brexit-related impacts due to national ID cards no longer being accepted for travel to Jersey (and the UK).
- Breaking the visitor numbers down by **travel method**:
 - 74% of visitors travelled via **scheduled air** routes (38,870)
 - 23% of visitors travelled via **scheduled ferry** services (11,900)

³ 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.

- Breaking visitor nights down by **country of residence**:
 - 84% of visitor nights were from the UK at 204,520, recovering to over three quarters of 2019 levels.
 - 3% of visitor nights were from France and were down by around a third on 2019 levels.

January - June 2022 compared to January - June 2019

- The average length of stay continues to increase compared to the same period during 2019, from 3.9 nights in 2019 up to 4.4 nights in 2022. The total number of nights spent by visitors in Jersey during the first half of 2022 returned to around three-quarters of the levels seen in 2019 at 803,250 nights.
- The UK and German markets are recovering well, with each at around two thirds of the levels seen during the same period in 2019. There have been charter flights to Jersey operating from nearly 20 German airports through the main summer season this year.
- The Irish market has recovered to nearly three-quarters of visitors compared to the same period in 2019.
- The French market is the slowest to recover at just over a quarter of 2019 levels, largely due to the capacity and Brexit issues noted above.
- The VFR market is performing well and has recovered to over 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.

⁴Tourism 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.

Table 1: June 2017 to 2022

June		<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		122,680		127,850		126,590		34,750		89,370		-29%		157%	
Total visits		94,810		85,380		88,260		26,940		52,470		-41%		95%	
		Visits	Nights	Visits	Nights	Visits	Nights	Visits		Visits	Nights	Visits	Nights	Visits	
Topline	Overnight visits	72,600	328,840	68,150	319,070	71,570	330,350	26,580		48,370	244,660	-32%	-26%	82%	
	Day visits	22,210		17,230		16,690		360		4,100		-75%		1039%	
		<u>3-year average 2017 to 2019</u>				<u>2019</u>		<u>2021</u>		<u>2022</u>		<u>Change 22/19</u>		<u>Change 21/22</u>	
		Visits		Nights		Visits	Nights	Visits		Visits	Nights	Visits	Nights	Visits	
Purpose of visit	Total Holiday visits	61,190		60,810		14,790		35,370		-42%		139%			
	- Overnight visits	51,750	254,090	53,610	263,480	14,690	33,120	171,810	-38%	-35%	125%				
	- Day visits	9,440		7,200		100	2,250		-69%		2152%				
	Total Business visits	6,400		6,280		2,620		4,090		-35%		56%			
	- Overnight visits	4,590	12,440	4,340	10,630	2,490	3,400	10,100	-22%	-5%	36%				
	- Day visits	1,810		1,940		130	700		-64%		436%				
	Total VFR visits	11,010		10,060		7,830		9,890		-2%		26%			
	- Overnight visits	10,920	53,150	9,950	50,160	7,750	9,860	54,590	-1%	9%	27%				
	- Day visits	90		110		80	30		-69%		-58%				
	Total Other visits	10,880		11,110		1,700		3,120		-72%		84%			
- Overnight visits	3,520	6,410	3,670	6,080	1,650	2,010	8,150	-45%	34%	22%					
- Day visits	7,370		7,440		50	1,120		-85%		2132%					
Country of residence	UK	51,620	257,570	56,420	264,860		40,410	204,520	-28%	-23%					
	Other CI	5,610	7,620	7,100	5,750		3,230	6,980	-54%	21%					
	Ireland	970	4,610	1,030	5,180		650	4,180	-36%	-19%					
	France	18,780	13,910	15,210	11,070		3,890	7,740	-74%	-30%					
	Germany	2,940	15,840	3,890	21,690		2,060	8,450	-47%	-61%					
	Other	9,560	26,540	4,630	21,800		2,230	12,790	-52%	-41%					
Mode of departure	Scheduled air	57,670	265,300	59,010	269,380		38,870	190,360	-34%	-29%					
	Scheduled ferry	28,580	53,990	25,760	52,940		11,900	51,780	-54%	-2%					
	Private plane	450	450	560	560		600	600	8%	8%					
	Visiting yachtsmen	2,700	6,340	2,930	7,470		970	1,910	-67%	-74%					
	Cruise passengers	90	0	0	0		130	0	0%	0%					
Duration of stay	Day visits	18,710		16,690			4,100		-75%						
	1-3 nights	28,190	65,680	27,870	64,700		17,630	42,270	-37%	-35%					
	4 - 6 nights	23,430	108,680	23,510	106,460		16,470	76,630	-30%	-28%					
	7 nights	15,230	104,820	15,810	108,910		10,240	71,660	-35%	-34%					
	8+ nights	3,940	46,900	4,390	50,270		4,050	54,110	-8%	8%					

*2021 figures are based on data from the Government of Jersey's travel registration forms and should be reviewed in light of the caveats listed below.

Table 2: Cumulative data – January to June 2017 to 2022

Year-to-date		2017		2018		2019		2021		2022		Change 22/19		Change 22/21							
Total passengers		516,820		520,250		531,760		63,340		358,350		-33%		466%							
Total visits		310,810		295,310		336,500		38,020		194,880		-42%		413%							
		Visits	Nights	Visits	Nights	Visits	Nights	Visits		Visits	Nights	Visits	Nights	Visits							
Topline	Overnight visits	269,100	1,190,750	242,160	998,380	278,420	1,084,480	37,580		182,610	803,250	-34%	-26%	386%							
	Day visits	41,700		53,140		58,080		440		12,270		-79%		2688%							
		3-year average 2017 to 2019				2019		2021		2022		Change 22/19		Change 21/22							
		Visits		Nights		Visits		Nights		Visits		Nights		Visits							
Purpose of visit	Total Holiday visits	197,030		206,590		18,120		107,870		-48%		495%									
	- Overnight visits	172,080		724,310		182,600		741,610		17,990		102,280		465,490		-44%		-37%		469%	
	- Day visits	24,950				23,990				130		5,590				-77%		4200%			
	Total Business visits	36,830		35,050		4,220		26,910		-23%		538%									
	- Overnight visits	27,800		94,590		25,390		74,670		4,040		23,310		69,940		-8%		-6%		477%	
	- Day visits	9,030				9,660				180		3,610				-63%		1903%			
	Total VFR visits	44,750		46,700		13,580		42,640		-9%		214%									
	- Overnight visits	44,050		218,770		45,310		217,660		13,500		42,060		225,620		-7%		4%		212%	
	- Day visits	700				1,390				80		580				-58%		623%			
	Total Other visits	35,600		48,160		2,100		17,450		-64%		731%									
- Overnight visits	19,310		53,390		25,120		50,540		2,050		14,950		42,190		-40%		-17%		629%		
- Day visits	16,290				23,040				50		2,500				-89%		4890%				
Country of residence	UK	198,210		826,610		216,210		850,800				147,830		642,870		-32%		-24%			
	Other CI	24,390		35,550		32,320		46,030				14,920		30,560		-54%		-34%			
	Ireland	3,200		16,020		3,190		14,320				2,280		11,080		-29%		-23%			
	France	57,270		65,260		56,990		47,220				15,450		37,200		-73%		-21%			
	Germany	7,710		40,130		8,570		44,640				5,700		26,410		-33%		-41%			
	Other	23,420		107,640		19,230		81,470				8,700		55,130		-55%		-32%			
Mode of departure	Scheduled air	219,180		887,420		241,120		912,180				151,950		634,000		-37%		-30%			
	Scheduled ferry	85,530		188,560		85,190		154,880				37,650		162,650		-56%		5%			
	Private plane	2,070		2,070		2,700		2,700				2,620		2,620		-3%		-3%			
	Visiting yachtsmen	6,100		13,150		6,320		14,700				2,190		3,970		-65%		-73%			
	Cruise passengers	1,320		0		1,170		0				470		0		-60%		0%			
Duration of stay	Day visits	50,980				58,080						12,270				-79%					
	1-3 nights	133,380		300,830		149,850		329,630				89,790		198,590		-40%		-40%			
	4 - 6 nights	82,770		370,320		80,810		361,090				56,460		259,100		-30%		-28%			
	7 nights	33,480		230,430		34,760		239,850				24,090		168,640		-31%		-30%			
	8+ nights	13,610		189,630		13,000		153,910				12,270		176,920		-6%		15%			

*2021 figures are based on data from the Government of Jersey's travel registration forms and should be reviewed in light of the caveats listed below.

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.