

## September 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.

### September summery

#### September 2022 compared to September 2021

- Total visits have increased by 7% in September 2022 compared to September 2021.
- Total holiday visits in September 2022 increased by 7% compared to September 2021 with overnight holiday visits up by 5%.

#### September 2022 compared to September 2019

- There was a total of 92,220 **departing passengers**<sup>1</sup> from Jersey, reflecting three-quarters (76%) of the level recorded in September 2019.
- Of all departing passengers, 55% were **tourism visitors**<sup>2</sup> (50,960).
- In September 2022, the **total number of tourism visits** recovered to 60% of 2019 levels.
- The number of **visits lasting at least one night** was 48,630 resulting in a **total number of nights** spent by visitors in Jersey of 262,260. The total number of nights spent by visitors in Jersey reflects a recovery to 81% of that recorded in September 2019.
- The number of day visits was 2,330, reflecting less than a fifth (18%) of the level seen in the same period of 2019.
- The **average length of stay** was 5.4 nights (for those visitors staying for at least one night), almost 1 day longer than the average length of stay recorded in both September 2019 and 2018.

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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.

- Breaking the visitor numbers down by main **purpose of visit**:
    - **holiday** visits accounted for 67% of visits at 34,340
    - **business** visits accounted for 8% of visits at 4,290
    - **visits to friends and family** accounted for 20% of visits at 10,300
  - The VFR market (visiting friends and relatives) has consistently shown the strongest recovery in 2022; in the latest month the number of visits to see friends and relatives was up by 8% compared to 2019 and the number of nights they spent on the island was up by more than 50%.
  - Whilst the number of visits made for business purposes was down by a third (-35%) compared to 2019, the number of nights spent in Jersey was relatively consistent with previous levels (-3%). Average length of stay for business visitors in September 2022 was almost 1 day longer than in 2019 (2.8 vs. 1.9).
  - The total number of holiday visits showed a recovery to 57% of previous levels in September whilst the number of holiday visitor nights recovered to 78% (due to the longer average length of stay for this visitor type).
  - Breaking the visitor numbers down by **travel method**:
    - 76% of visitors travelled via **scheduled air** routes (38,860), recovering to 69% of 2019 levels
    - 22% of visitors travelled via **scheduled ferry** services (11,060), recovering to 43% of 2019 levels
  - Breaking visitor numbers down by **country of residence**:
    - 77% of visitors were from the **UK** (39,040)
    - 6% of visitors were from **France** (3,040); in September 2019 French visitors accounted for nearly a fifth (17%)
    - 5% of visitors were from **Germany** (2,630) reflecting an increase in visits of 46% compared to September 2019
    - 5% of visitors were from **other Channel Islands** (2,390) reflecting a slower recovery to 43% of 2019 levels
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## Year-to-date summary

### January – September 2022 compared to January - September 2021

Comparing the first 9 months of 2022 to the same period during 2021:

- there have been over double the volume of total visits, reflecting an increase of 120%.
- looking at each of the visit purpose categories individually, visits for holiday visits, business visits and 'other' purposes have each increased by over 100%, with total holiday visits up by 119% reflecting a promising start to the post-covid recovery of the tourism industry. Visits to friends and relatives increased by 88%.

### January – September 2022 compared to January – September 2019

- Total **departing passengers** have recovered to 71% of 2019 levels (684,610)
- The number of **total visitors** has recovered to 60% of 2019 levels (388,570)
- 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.
- Focusing on **visit purpose**, the VFR and business visitor markets are performing well with the **number of visits** recovering to 94% and 77% respectively. **Visitor nights** are up for both these markets, by 9% for VFR and 2% for business visitors.
- The number of visits made for holiday and leisure purposes remains at 55% of previous levels (246,330) whilst the number of visitor nights has recovered to 70%. Holiday day visits have only recovered to 25% of 2019 levels.
- Focusing on **travel method**, 74% of visitors travelled by **scheduled air** routes (285,730) recovering to 66% of 2019 levels and 22% travelled by **scheduled ferry** services (86,680) recovering to 46% of 2019 levels.
- The **number of visits** from the UK and Germany have shown strong recovery so far in 2022, reflecting around three-quarters of the levels seen in 2019.
- The Irish market has also shown a strong recovery in 2022, with the number of visits from Ireland reflecting 84% of previous levels.
- In 2022, visits from the other Channel Islands and France have shown the slowest recovery at 46% and 28% of 2019 levels respectively.

**Table A1: September 2017 to 2022**

September		2017		2018		2019		2021		2022		Change 22/19		Change 22/21	
Total passengers		121,080		127,260		122,010		72,500		92,220		-24%		27%	
Total visits		79,090		86,130		85,070		47,660		50,960		-40%		7%	
		Visits	Nights	Visits	Nights	Visits	Nights	Visits		Visits	Nights	Visits	Nights	Visits	
Topline	Overnight visits	68,660	349,970	73,330	326,020	71,750	322,810	45,990		48,630	262,260	-32%	-19%	6%	
	Day visits	10,430		12,800		13,320		1,670		2,330		-82%		40%	
		3-year average 2017 to 2019				2019		2021		2022		Change 22/19		Change 22/21	
		Visits		Nights		Visits	Nights	Visits		Visits	Nights	Visits	Nights	Visits	
Purpose of visit	Total Holiday visits	60,640				60,640		31,970		34,340		-43%		7%	
	- Overnight visits	51,860		252,020		51,330	230,800	30,900		32,400	179,570	-37%	-22%	5%	
	- Day visits	8,790				9,300		1,070		1,930		-79%		80%	
	Total Business visits	7,590				6,630		4,220		4,290		-35%		2%	
	- Overnight visits	6,040		13,990		6,030	11,460	3,800		3,930	11,140	-35%	-3%	3%	
	- Day visits	1,550				600		420		360		-39%		-14%	
	Total VFR visits	10,120				9,500		7,970		10,300		8%		29%	
	- Overnight visits	10,000		49,260		9,350	43,090	7,890		10,270	65,280	10%	51%	30%	
	- Day visits	120				150		80		30		-77%		-63%	
	Total Other visits	5,080				8,300		3,500		2,030		-76%		-42%	
	- Overnight visits	3,360		17,660		5,030	37,460	3,400		2,030	6,270	-60%	-83%	-40%	
	- Day visits	1,720				3,270		100		0		-97%		-100%	
Country of residence	UK	55,870		271,460		54,640	260,580			39,040	201,810	-29%	-23%		
	Other CI	5,130		10,770		5,560	10,940			2,390	6,950	-57%	-36%		
	Ireland	1,130		5,710		800	3,790			1,360	8,070	69%	113%		
	France	12,860		10,950		14,830	11,690			3,040	7,100	-79%	-39%		
	Germany	2,700		15,380		1,800	8,130			2,630	13,310	46%	64%		
	Other	5,740		18,670		7,450	27,680			2,500	25,020	-66%	-10%		
Mode of departure	Scheduled air	57,170		269,730		56,660	261,060			38,860	211,140	-31%	-19%		
	Scheduled ferry	23,760		60,040		25,890	58,600			11,060	49,640	-57%	-15%		
	Private plane	520		520		590	590			530	530	-10%	-10%		
	Visiting yachtsmen	1,380		2,630		1,300	2,570			510	960	-61%	-63%		
	Cruise passengers	600		0		630	0			0	0	-100%	0%		
Duration of stay	Day visits	12,180				13,320				2,330		-82%			
	1-3 nights	28,430		62,510		30,190	66,420			16,200	37,520	-46%	-44%		
	4 - 6 nights	21,840		102,240		20,910	96,320			15,970	75,570	-24%	-22%		
	7 nights	15,940		111,180		16,570	114,230			11,800	82,590	-29%	-28%		
	8+ nights	5,040		57,000		4,100	45,840			4,650	66,590	14%	45%		

**Table A2: Cumulative - January to September 2017 to 2022**

Year-to-date		<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		936,840		950,710		962,360		268,160		684,610		-29%		155%
Total visits		602,600		592,680		646,490		176,400		388,570		-40%		120%
		Visits	Nights	Visits	Nights	Visits	Nights	Visits		Visits	Nights	Visits	Nights	Visits
Topline	Overnight visits	512,770	2,467,510	497,250	2,265,110	534,490	2,342,450	171,080		363,410	1,833,620	-32%	-22%	112%
	Day visits	89,830		95,430		112,000		5,320		25,160		-78%		373%
		<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	Nights	Visits		Visits	Nights	Visits	Nights	Visits
Purpose of visit	Total Holiday visits	429,100				444,070		112,600		246,330		-45%		119%
	- Overnight visits	363,760		1,691,550		376,180		1,689,270		229,110		-39%		110%
	- Day visits	65,340				67,900		3,710		17,230		-75%		364%
	Total Business visits	54,550				49,320		11,800		37,830		-23%		221%
	- Overnight visits	41,720		139,790		37,210		102,480		33,260		-11%		206%
	- Day visits	12,830				12,120		930		4,580		-62%		392%
	Total VFR visits	82,590				88,060		44,000		82,600		-6%		88%
	- Overnight visits	81,530		430,190		86,320		442,520		81,860		-5%		88%
	- Day visits	1,050				1,740		380		740		-57%		95%
	Total Other visits	47,690				65,030		8,000		21,800		-66%		173%
	- Overnight visits	27,830		96,680		34,790		108,170		19,190		-45%		149%
	- Day visits	19,860				30,240		300		2,610		-91%		770%
Country of residence	UK	385,410		1,808,730		403,900		1,825,670		292,530		-28%		-20%
	Other CI	39,520		62,940		47,310		72,820		21,840		-54%		-34%
	Ireland	7,830		42,980		7,740		43,220		6,490		-16%		-12%
	France	114,700		136,500		119,940		116,240		33,190		-72%		-28%
	Germany	18,700		96,050		19,660		90,680		14,690		-25%		-22%
	Other	47,770		211,160		47,940		193,810		19,820		-59%		-29%
Mode of departure	Scheduled air	407,770		1,860,560		433,450		1,899,570		285,730		-34%		-26%
	Scheduled ferry	181,260		454,670		186,990		395,970		86,680		-54%		4%
	Private plane	3,540		3,540		4,420		4,420		4,400		0%		0%
	Visiting yachtsmen	17,540		39,580		18,010		42,470		9,730		-46%		-53%
	Cruise passengers	3,800		0		3,630		0		2,030		-44%		0%
Duration of stay	Day visits	99,080				111,990				25,160		-78%		
	1-3 nights	221,560		493,590		242,100		540,260		144,760		-40%		-40%
	4 - 6 nights	159,510		721,270		159,770		723,480		113,690		-29%		-27%
	7 nights	94,540		647,870		97,200		667,700		70,050		-28%		-27%
	8+ nights	39,220		495,640		35,420		411,010		34,910		-1%		19%

## 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.