



## December 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.

### December summary

#### December 2022 compared to December 2019

- There was a total of 57,530 **departing passengers**<sup>1</sup> from Jersey, reflecting a recovery to 83% of 2019 levels and the strongest monthly recovery recorded in 2022.
- Of all departing passengers, a third (33%) were **tourism visitors**<sup>2</sup> who had reached the end of their stay in Jersey (18,880) reflecting a lower proportion than seen in previous years.
- A **total of 17,420** visitors stayed in Jersey for at least one night and together they spent a total of 83,000 nights on the Island.
- Whilst the number of overnight visitors recovered to 61% of the level seen in December 2019, the number of visitor nights recovered to 86% of previous levels.
- The **average length of stay** was 4.8 nights (for those visitors staying for at least one night), which is more than a whole day longer than in 2019 (3.4 nights) and the average recorded for 2017 to 2019 (3.8).
- Breaking the visitor numbers down by main **purpose of visit**:
  - **holiday** visits accounted for 24% of all visits at 4,610
  - **business** visits accounted for 21% of visits at 3,900
  - **visits to friends and family** accounted for just over half (51%) of visits at 9,660

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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.

- The total number of holiday visits recovered to 36% of levels seen in December 2019; the number of visitor nights has recovered to 42% for this visitor type.
- The total number of business visitors recovered to 81% of previous levels and the number of visitors nights recovered to 75%.
- The number of visits to see friends and relatives was almost identical to that seen in 2019 (0% difference) however the number of visitor nights increased by 42% due to increased average length of stay for this visitor type.
- Breaking the visitor numbers down by **travel method**:
  - 81% of visitors travelled via **scheduled air** routes (15,380), recovering to 59% of 2019 levels
  - 17% of visitors travelled via **scheduled ferry** services (3,150), recovering to 63% of 2019 levels
- Breaking visitor numbers down by **country of residence**:
  - 76% of visitors were from the **UK** (14,330)
  - 10% of visitors were from the other Channel Islands (1,930)
  - 9% of visitors were from **France** (1,620)

### December 2022 compared to December 2021

- Tourism visits in December 2022 were largely on par with December 2021 at -2%.
- Total holiday visits in December 2022 decreased by 37% compared to December 2021, visits to see friends and relatives increased by 22%, business visits almost doubled at a 90% increase and 'other' decreased by 64%.

## Annual Summary

### 2022 compared to 2019

- The total number of **departing passengers (865,550)** has recovered to 73% of 2019 levels.
- The number of **departing visitors (473,200)** has recovered to 61% of 2019 levels.
- The number of holiday visitors in 2022 (282,360) has recovered to 55% of the level seen in 2019, whilst the number of nights spent by this visitor type has recovered to 69%.
- Business visitors has recovered well in 2022 with the number of visits made for this purpose (53,760) returning to 81% of 2019 levels; the number of visitor nights spent by business visitors exceeded that recorded in 2019 (+8%).
- The visiting friends and relatives visitors showed the strongest recovery in 2022, with the number of visits (109,470) returning to a similar level to that seen in 2019 (-3%) and the average recorded for 2017 to 2019 (+2%); the number of nights spent by this visitor type increased by 15% compared to 2019.
- The **average length of stay** (for those visitors staying for at least one night) has increased from 4.2 nights in 2019 to 4.9 nights in 2022 resulting in the total number of visitor nights recovering to 79% of previous levels.
- The **UK and German markets** have shown a strong recovery in 2022, with the number of visits from these countries returning to around three-quarters of that seen in 2019 (72% and 76% respectively).
- In 2022, visits from the other **Channel Islands and France** have shown the slowest recovery at 48% and 29% of 2019 levels respectively.
- Although a smaller proportion of the overall visitor total, the **Irish market** has shown the strongest recovery in 2022, with visitor numbers returning to 90% of previous levels.
- 75% of visitors travelled to the island via scheduled air services; the number of visits made by scheduled air (355,360) recovered to 66% of 2019 levels. The number of nights spent by this visitor type recovered to 75% of 2019 levels.
- 21% of visitors travelled via scheduled sea services; the number of visits made via scheduled sea (100,070) was around half (48%) of levels seen previously; the number of nights spent by these visitors was seen to increase by 6% due to the significantly longer average length of stay for this visitor type.

## 2022 compared to 2021

- Compared to 2021 the number of departing passengers doubled (2022 was 107% of 2021 levels).
- The number of tourism visits have increased by 86% compared to 2021.
- Looking at each of the visit purpose categories individually, visits for business and 'other' purposes have each increased by over 100%. Holiday visits are up by 83% reflecting a promising start to the post-covid recovery of the tourism industry. Visits to friends and relatives increased by 72%.

**Table A1: December 2017 to 2022**

December		<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>
<b>Total passengers</b>		<b>68,260</b>		<b>68,370</b>		<b>69,150</b>		<b>42,200</b>		<b>57,530</b>		<b>-17%</b>		<b>36%</b>
<b>Total visits</b>		<b>26,270</b>		<b>34,660</b>		<b>31,260</b>		<b>19,280</b>		<b>18,880</b>		<b>-40%</b>		<b>-2%</b>
		<b>Visits</b>	<b>Nights</b>	<b>Visits</b>	<b>Nights</b>	<b>Visits</b>	<b>Nights</b>	<b>Visits</b>		<b>Visits</b>	<b>Nights</b>	<b>Visits</b>	<b>Nights</b>	<b>Visits</b>
<b>Topline</b>	Overnight visits	22,270	98,610	29,880	110,110	28,630	96,120	18,790		17,420	83,000	-39%	-14%	-7%
	Day visits	3,990		4,780		2,630		490		1,460		-44%		198%
		<b>3-year average 2017 to 2019</b>		<b>2019</b>		<b>2021</b>		<b>2022</b>		<b>Change 22/19</b>		<b>Change 22/21</b>		
		<b>Visits</b>	<b>Nights</b>	<b>Visits</b>	<b>Nights</b>	<b>Visits</b>		<b>Visits</b>	<b>Nights</b>	<b>Visits</b>	<b>Nights</b>	<b>Visits</b>	<b>Nights</b>	<b>Visits</b>
<b>Purpose of visit</b>	<b>Total Holiday visits</b>	<b>12,580</b>		<b>12,640</b>		<b>7,300</b>		<b>4,610</b>		<b>-64%</b>		<b>-37%</b>		
	- Overnight visits	10,810	34,490	11,510	31,820	7,150		4,040	13,460	-65%	-58%	-43%		
	- Day visits	1,770		1,120		150		570		-49%		280%		
	<b>Total Business visits</b>	<b>5,460</b>		<b>4,800</b>		<b>2,050</b>		<b>3,900</b>		<b>-19%</b>		<b>90%</b>		
	- Overnight visits	3,910	15,330	3,930	16,260	1,800		3,560	12,250	-9%	-25%	98%		
	- Day visits	1,550		870		250		340		-61%		36%		
	<b>Total VFR visits</b>	<b>9,940</b>		<b>9,610</b>		<b>7,930</b>		<b>9,660</b>		<b>0%</b>		<b>22%</b>		
	- Overnight visits	9,790	45,670	9,450	39,930	7,900		9,590	56,800	1%	42%	21%		
	- Day visits	150		160		30		70		-58%		133%		
	<b>Total Other visits</b>	<b>2,750</b>		<b>4,210</b>		<b>2,000</b>		<b>720</b>		<b>-83%</b>		<b>-64%</b>		
- Overnight visits	2,430	6,110	3,740	8,110	1,940		240	490	-94%	-94%	-88%			
- Day visits	320		470		60		480		2%		700%			
<b>Country of residence</b>	UK	21,300	78,020	21,790	70,600			14,330	63,070	-34%	-11%			
	Other CI	3,260	5,710	4,000	6,980			1,930	3,350	-52%	-52%			
	Ireland	170	1,040	110	580			110	520	0%	-11%			
	France	4,220	6,460	4,270	9,730			1,620	4,240	-62%	-56%			
	Germany	40	350	20	50			40	120	110%	130%			
	Other	1,750	10,030	1,060	8,160			850	11,690	-19%	43%			
<b>Mode of departure</b>	Scheduled air	25,060	87,030	25,880	81,760			15,380	68,540	-41%	-16%			
	Scheduled ferry	5,290	14,050	4,990	13,920			3,150	14,100	-37%	1%			
	Private plane	320	320	330	330			340	340	3%	3%			
	Visiting yachtsmen	60	210	60	110			10	10	-80%	-89%			
	Cruise passengers	0	0	0	0			0	0	0%	0%			
<b>Duration of stay</b>	Day visits	3,800		2,630				1,460	0	-44%				
	1-3 nights	16,630	34,430	19,860	40,210			9,330	18,880	-53%	-53%			
	4 - 6 nights	6,340	28,390	5,630	25,320			4,330	20,260	-23%	-20%			
	7 nights	1,890	12,930	1,370	9,570			1,690	11,790	23%	23%			
	8+ nights	2,070	25,640	1,770	21,020			2,080	32,070	17%	53%			

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

Full-year		2017		2018		2019		2021		2022		Change 22/19		Change 22/21
Total passengers		1,160,470		1,180,830		1,193,510		417,480		865,550		-27%		107%
Total visits		705,110		725,420		770,690		254,760		473,200		-39%		86%
		Visits	Nights	Visits	Nights	Visits	Nights	Visits		Visits	Nights	Visits	Nights	Visits
Topline	Overnight visits	604,880	2,868,170	617,660	2,719,290	645,550	2,737,630	246,450		441,750	2,171,000	-32%	-21%	79%
	Day visits	100,240		107,750		125,140		8,310		31,450		-75%		278%
		<b>3-year average 2017 to 2019</b>				<b>2019</b>		<b>2021</b>		<b>2022</b>		<b>Change 22/19</b>		<b>Change 22/21</b>
		Visits		Nights		Visits		Nights		Visits		Nights		Visits
Purpose of visit	<b>Total Holiday visits</b>	<b>495,050</b>		<b>514,620</b>		<b>154,360</b>		<b>282,360</b>		<b>-45%</b>		<b>83%</b>		
	- Overnight visits	423,890	1,914,660	439,150	1,918,290	149,350	262,880	1,322,210	-40%	-31%	76%			
	- Day visits	71,160		75,470		5,010	19,490		-74%		289%			
	<b>Total Business visits</b>	<b>73,540</b>		<b>66,110</b>		<b>22,980</b>		<b>53,760</b>		<b>-19%</b>		<b>134%</b>		
	- Overnight visits	55,910	193,000	50,050	138,810	20,660	47,050	149,580	-6%	8%	128%			
	- Day visits	17,630		16,060		2,320	6,710		-58%		189%			
	<b>Total VFR visits</b>	<b>107,410</b>		<b>112,950</b>		<b>63,820</b>		<b>109,470</b>		<b>-3%</b>		<b>72%</b>		
	- Overnight visits	105,810	540,540	110,730	544,560	63,300	108,540	624,290	-2%	15%	71%			
	- Day visits	1,600		2,220		520	930		-58%		79%			
	<b>Total Other visits</b>	<b>57,740</b>		<b>77,020</b>		<b>13,600</b>		<b>27,610</b>		<b>-64%</b>		<b>103%</b>		
- Overnight visits	37,080	126,680	45,620	135,980	450	23,270	74,900	-49%	-45%	5071%				
- Day visits	20,660		31,390		460	4,340		-86%		843%				
Country of residence	UK	472,290	2,137,490	493,990	2,146,870		357,460	1,721,220	-28%	-20%				
	Other CI	50,940	81,790	59,740	94,490		28,690	60,290	-52%	-36%				
	Ireland	9,000	48,630	8,250	45,900		7,410	42,730	-10%	-7%				
	France	128,460	159,810	135,550	138,940		39,890	102,050	-71%	-27%				
	Germany	19,970	103,800	20,950	95,750		15,870	75,640	-24%	-21%				
	Other	53,070	243,500	52,200	215,690		23,870	169,040	-54%	-22%				
Mode of departure	Scheduled air	505,230	2,210,920	534,640	2,244,740		355,360	1,675,640	-34%	-25%				
	Scheduled ferry	201,870	518,510	208,360	444,020		100,070	468,940	-52%	6%				
	Private plane	4,620	4,620	5,480	5,480		5,530	5,530	1%	1%				
	Visiting yachtsmen	18,220	40,970	18,580	43,370		10,210	20,870	-45%	-52%				
	Cruise passengers	3,800	0	3,630	0		2,030	0	-44%	0%				
Duration of stay	Day visits	111,040		125,140			31,450		-75%					
	1-3 nights	285,110	634,020	312,130	697,210		187,480	418,600	-40%	-40%				
	4 - 6 nights	189,200	853,420	188,070	851,590		136,160	631,500	-28%	-26%				
	7 nights	103,170	707,240	105,630	726,590		77,500	542,450	-27%	-25%				
	8+ nights	45,220	580,130	39,720	462,250		40,610	578,420	2%	25%				

## 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.