



October 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.

October summery

October 2022 compared to October 2021

- Total visits have increased by 9% in October 2022 compared to October 2021.
- Total holiday visits in October 2022 decreased by 3% compared to October 2021, VRF increased by 34%, business and 'other' increased by about a fifth.

October 2022 compared to October 2019

- There was a total of 76,150 **departing passengers**¹ from Jersey, reflecting a recovery to almost four-fifths (78%) of 2019 levels and the strongest monthly recovery recorded so far in 2022.
- Of all departing passengers, 57% were **visitors**² (43,420).
- The **total number of visits** recovered to almost three-quarters (73%) of 2019 levels, again reflecting the strongest monthly recovery thus far in 2022.
- A total of 41,200 visitors stayed in Jersey for at least one night and together they spent a total of 176,810 nights on the Island; the number of visitor nights has recovered to 84% of previous levels.
- The number of day visits was 2,230, reflecting a recovery to around two-fifths (39%) of the level seen in 2019.
- The **average length of stay** was 4.3 nights (for those visitors staying for at least one night), which is marginally higher than in 2019 (3.9 nights) but similar to the average recorded for October 2017 to 2019 (4.1 nights)

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.

- Breaking the visitor numbers down by main **purpose of visit**:
 - **holiday** visits accounted for 55% of visits at 23,910
 - **business** visits accounted for 12% of visits at 5,410
 - **visits to friends and family** accounted for a quarter (25%) of visits at 10,800
 - The VFR (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 a third (34%) compared to October 2019 and the number of nights spent on the island was up by more than 50%.
 - The number of business visitors was also up in the latest month (+6%) and the number of nights spent in Jersey by this visitor type had increased by 60% compared to 2019.
 - The total number of holiday visits (23,910) has recovered to 59% of levels seen in 2019; the number of visitor nights has recovered to 67%.
 - Breaking the visitor numbers down by **travel method**:
 - 81% of visitors travelled via **scheduled air** routes (34,990), recovering to 74% of 2019 levels
 - 18% of visitors travelled via **scheduled ferry** services (7,600), recovering to 67% of 2019 levels; whilst the number of visits made via scheduled ferry is lower than in 2019, the number of visitor nights is up by nearly a quarter (24%)
 - Breaking visitor numbers down by **country of residence**:
 - 77% of visitors were from the **UK** (33,590)
 - 7% of visitors were from **France** (3,210)
 - 6% of visitors were from the other Channel Islands (2,610)
 - 2% of visitors were from **Germany** (1,020)
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Year-to-date summary

January – October 2022 compared to January - October 2021

Comparing the first 10 months of 2022 to the same period during 2021:

- there has been double the volume of total visits, reflecting an increase of 100%.
- 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 97% reflecting a promising start to the post-covid recovery of the tourism industry. Visits to friends and relatives increased by 80%.

January – October 2022 compared to January – October 2019

- Total **departing passengers (760,770)** have recovered to 72% of 2019 levels
- The number of **departing visitors (431,990)** has recovered to 61% of 2019 levels
- The **average length of stay** (for those visitors staying for at least one night) has increased from 4.3 nights in 2019 to 5.0 nights in 2022 resulting in the total number of nights spent in Jersey recovering to 79% of previous levels.
- The **Irish market** has shown the strongest recovery in 2022, with visitor numbers returning to 89% of previous levels.
- The **UK and German markets** have also shown a strong recovery in 2022, with the number of visits from these countries returning to around three-quarters of that seen in 2019 (73% and 75% respectively).
- In 2022, visits from the other **Channel Islands and France** have shown the slowest recovery at 47% and 29% of 2019 levels respectively.

Table A1: October 2017 to 2022

October		<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		94,070		97,650		97,220		66,440		76,150		-22%		15%
Total visits		48,810		60,830		59,290		39,820		43,420		-27%		9%
		Visits	Nights	Visits	Nights	Visits	Nights	Visits		Visits	Nights	Visits	Nights	Visits
Topline	Overnight visits	45,280	205,150	55,400	223,310	53,530	209,770	38,170		41,200	176,810	-23%	-16%	8%
	Day visits	3,530		5,430		5,760		1,650		2,230		-61%		35%
		<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	38,200				40,270		24,630		23,910		-41%		-3%
	- Overnight visits	35,460				36,640		23,810		23,160		-37%		-3%
	- Day visits	2,740				3,620		820		750		-79%		-8%
	Total Business visits	5,930				5,120		4,460		5,410		6%		21%
	- Overnight visits	4,300				3,330		3,790		4,670		40%		23%
	- Day visits	1,630				1,790		670		740		-59%		11%
	Total VFR visits	7,810				8,060		8,030		10,800		34%		34%
	- Overnight visits	7,550				8,030		7,950		10,740		34%		35%
	- Day visits	250				30		80		60		93%		-28%
	Total Other visits	4,370				5,850		2,700		3,300		-44%		22%
	- Overnight visits	4,090				5,540		2,620		2,610		-53%		0%
	- Day visits	280				310		80		690		121%		765%
Country of residence	UK	41,880	172,690	44,650	178,630					33,590	144,750	-25%	-19%	
	Other CI	4,140	6,930	4,190	8,010					2,610	4,980	-38%	-38%	
	Ireland	680	2,940	290	1,390					630	3,180	118%	129%	
	France	6,230	11,440	6,950	6,840					3,210	8,360	-54%	22%	
	Germany	1,130	4,490	1,260	4,990					1,020	4,620	-19%	-7%	
	Other	2,240	14,260	1,960	9,910					2,360	10,940	21%	10%	
Mode of departure	Scheduled air	44,200	173,750	47,040	182,910					34,990	143,580	-26%	-22%	
	Scheduled ferry	11,180	37,710	11,370	25,790					7,600	32,100	-33%	24%	
	Private plane	410	410	410	410					490	490	21%	21%	
	Visiting yachtsmen	530	880	470	670					340	650	-28%	-3%	
	Cruise passengers	0	0	0	0					0	0	0%	0%	
Duration of stay	Day visits	4,910		5,760						2,230		-61%		
	1-3 nights	26,670	64,300	29,260	72,370					20,220	46,960	-31%	-35%	
	4 - 6 nights	17,150	77,050	17,290	79,220					13,950	63,520	-19%	-20%	
	7 nights	5,140	35,360	5,230	36,550					4,730	33,140	-9%	-9%	
	8+ nights	2,440	36,040	1,760	21,640					2,300	33,200	30%	53%	

Table A2: Cumulative - January to October 2017 to 2022

Year-to-date		2017		2018		2019		2021		2022		Change 22/19		Change 22/21
Total passengers		1,030,910		1,048,350		1,059,580		334,600		760,770		-28%		127%
Total visits		651,410		653,510		705,780		216,220		431,990		-39%		100%
		Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights	Visits
Topline	Overnight visits	558,050	2,672,660	552,650	2,488,420	588,030	2,552,220	209,250	0	404,600	2,010,430	-31%	-21%	93%
	Day visits	93,360		100,850		117,750		6,970		27,380		-77%		293%
		3-year average 2017 to 2019		2019		2021		2022		Change 22/19		Change 22/21		
		Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights	Visits
Purpose of visit	Total Holiday visits	467,300		484,340		137,230		270,240		-44%		97%		
	- Overnight visits	399,220	1,834,580	412,820	1,838,560	132,700		252,260	1,283,520	-39%	-30%	90%		
	- Day visits	68,080		71,520		4,530		17,980		-75%		297%		
	Total Business visits	60,480		54,440		16,260		43,240		-21%		166%		
	- Overnight visits	46,020	159,790	40,530	112,090	14,660		37,920	119,590	-6%	7%	159%		
	- Day visits	14,460		13,910		1,600		5,320		-62%		232%		
	Total VFR visits	90,390		96,110		52,030		93,400		-3%		80%		
	- Overnight visits	89,090	462,650	94,340	477,110	51,570		92,600	537,040	-2%	13%	80%		
	- Day visits	1,310		1,770		460		800		-55%		74%		
	Total Other visits	52,050		70,880		10,700		25,110		-65%		135%		
	- Overnight visits	31,920	113,930	40,330	124,460	10,320		21,800	70,260	-46%	-44%	111%		
	- Day visits	20,140		30,550		380		3,310		-89%		770%		
Country of residence	UK	427,280	1,981,410	448,550	2,004,300			326,120	1,599,710	-27%	-20%			
	Other CI	43,670	69,870	51,500	80,840			24,450	53,390	-53%	-34%			
	Ireland	8,510	45,930	8,030	44,610			7,130	41,330	-11%	-7%			
	France	120,940	147,940	126,890	123,080			36,400	91,960	-71%	-25%			
	Germany	19,830	100,530	20,920	95,680			15,710	74,970	-25%	-22%			
	Other	50,010	225,420	49,900	203,710			22,180	149,040	-56%	-27%			
Mode of departure	Scheduled air	451,970	2,034,310	480,500	2,082,480			320,720	1,540,830	-33%	-26%			
	Scheduled ferry	192,440	492,390	198,350	421,760			94,280	444,070	-52%	5%			
	Private plane	3,950	3,950	4,830	4,830			4,890	4,890	1%	1%			
	Visiting yachtsmen	18,060	40,450	18,480	43,140			10,070	20,620	-46%	-52%			
	Cruise passengers	3,800	0	3,630	0			2,030	0	-44%	0%			
Duration of stay	Day visits	103,990		117,750				27,380		-77%				
	1-3 nights	248,230	557,880	271,350	612,620			164,980	371,800	-39%	-39%			
	4 - 6 nights	176,670	798,310	177,060	802,700			127,640	591,920	-28%	-26%			
	7 nights	99,680	683,220	102,430	704,250			74,780	523,430	-27%	-26%			
	8+ nights	41,660	531,680	37,190	432,650			37,200	523,260	0%	21%			

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.