

# VISIT GUERNSEY

## CRUISE VISITOR EXIT SURVEY

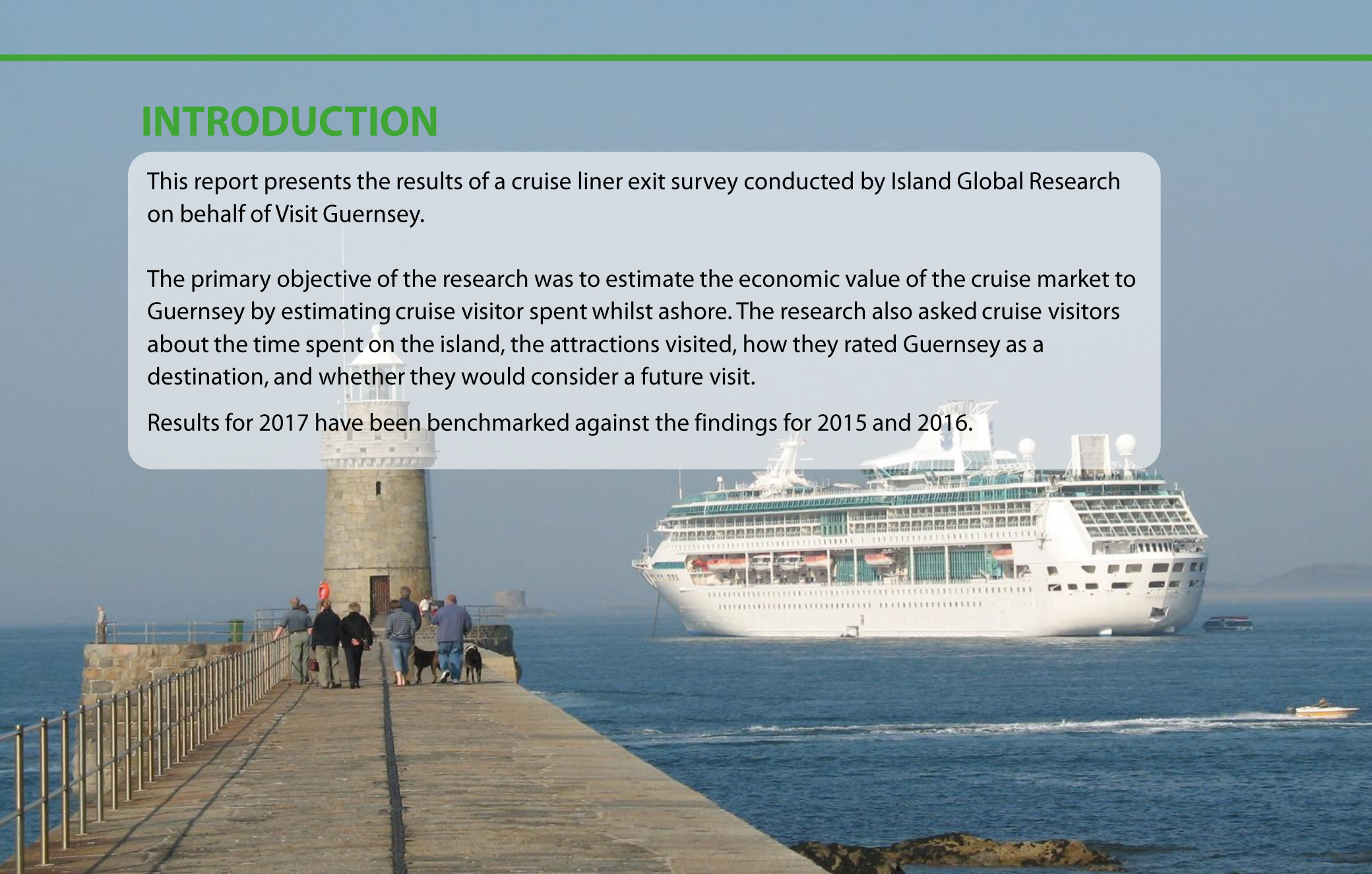
November 2017

# INTRODUCTION

This report presents the results of a cruise liner exit survey conducted by Island Global Research on behalf of Visit Guernsey.

The primary objective of the research was to estimate the economic value of the cruise market to Guernsey by estimating cruise visitor spent whilst ashore. The research also asked cruise visitors about the time spent on the island, the attractions visited, how they rated Guernsey as a destination, and whether they would consider a future visit.

Results for 2017 have been benchmarked against the findings for 2015 and 2016.



# METHODOLOGY

Face to face exit surveys were conducted with cruise ship passengers and crew members who visited Guernsey. The exit questionnaire comprised of six questions relating to their visit, and five profiling questions.

The exit interviews were undertaken throughout the season. Visitors from a range of ships were interviewed. The cruise ships were selected by Visit Guernsey and were intended to provide a range of ships. They covered a range of companies, capacities, stage of visit (first, intermediate and last port), arrival days and arrival times. On some dates, more than one cruise ship arrived in Guernsey. The target sample size was 400 completed surveys, with approximately 20 surveys per cruise ship. This would allow a 3% margin of error (assuming an average party size of 2.5).

The economic value of the cruise market was estimated based on the number of cruise visitors coming ashore and survey responses on the amount spent on different categories.

This is the third year we have conducted the cruise passenger exit survey. The survey was intended to allow the 2017 results to be compared to the previous years, though this year's survey was slightly shorter.

# SAMPLE

There were 110,288 cruise ship passengers who came ashore in Guernsey in 2017. This compared to 122,700 in 2015 and 133,000 in 2016.

The exit survey was completed by 410 passengers and 20 crew members, from 20 cruise ships visiting Guernsey between 7 May and 16 September 2017. The exit survey represented approximately 1,200 passengers since the average party size was 2.8.

<b>MONTH</b>	<b>SHIP INTERVIEWED</b>
May	Crown Princess Queen Elizabeth Artania Oriana Norwegian Jade
June	Britannia Caribbean Princess Adonia Ventura
July	Azura Vision of the Seas Arcadia
August	Caribbean Princess Prisendam Azura Queen Elizabeth Marco Polo
September	Azamara Journey Columbus Ventura



## PROFILE OF SURVEY RESPONDENTS

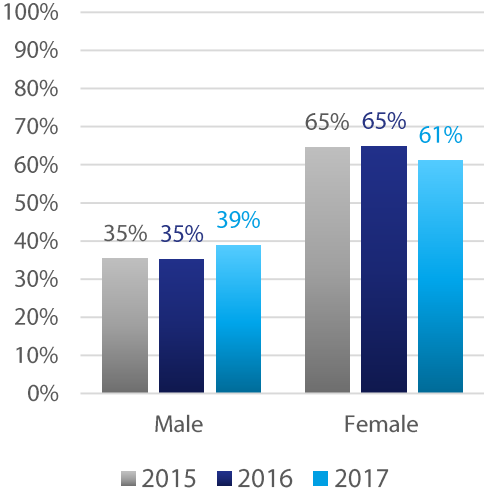
The following graphs present the profile of survey respondents, showing their gender, age group, country of origin, and number in immediate party.

# PROFILE OF SURVEY RESPONDENTS: GENDER & AGE

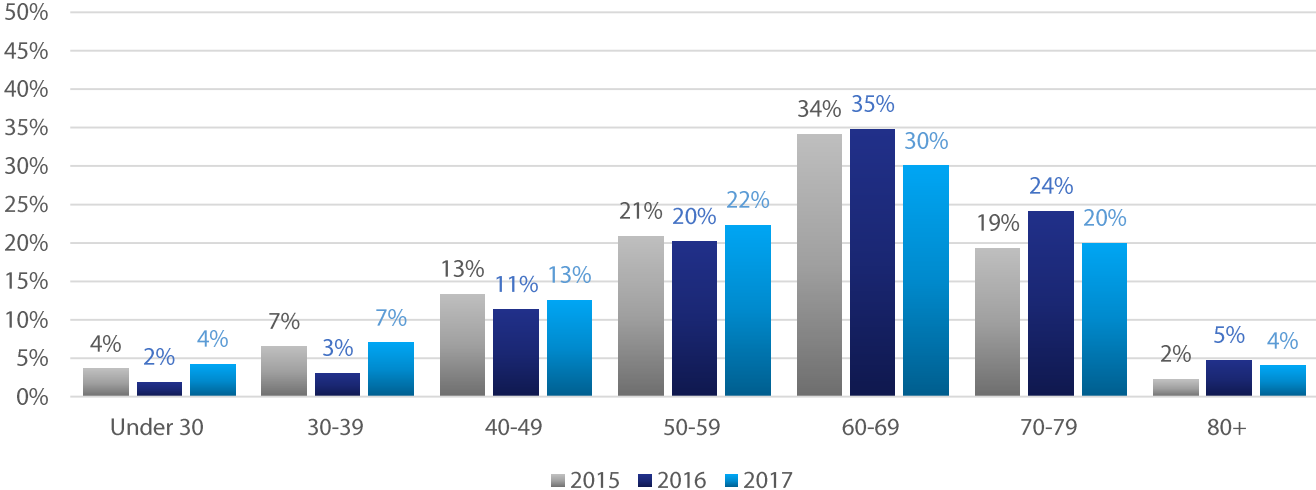
Of the 430 respondents interviewed in 2017, 61% were female and 39% were male. The gender profile was very similar to previous years.

More than half of the respondents were aged 60 years or older. The age profile of respondents was very similar to previous years.

Gender Profile

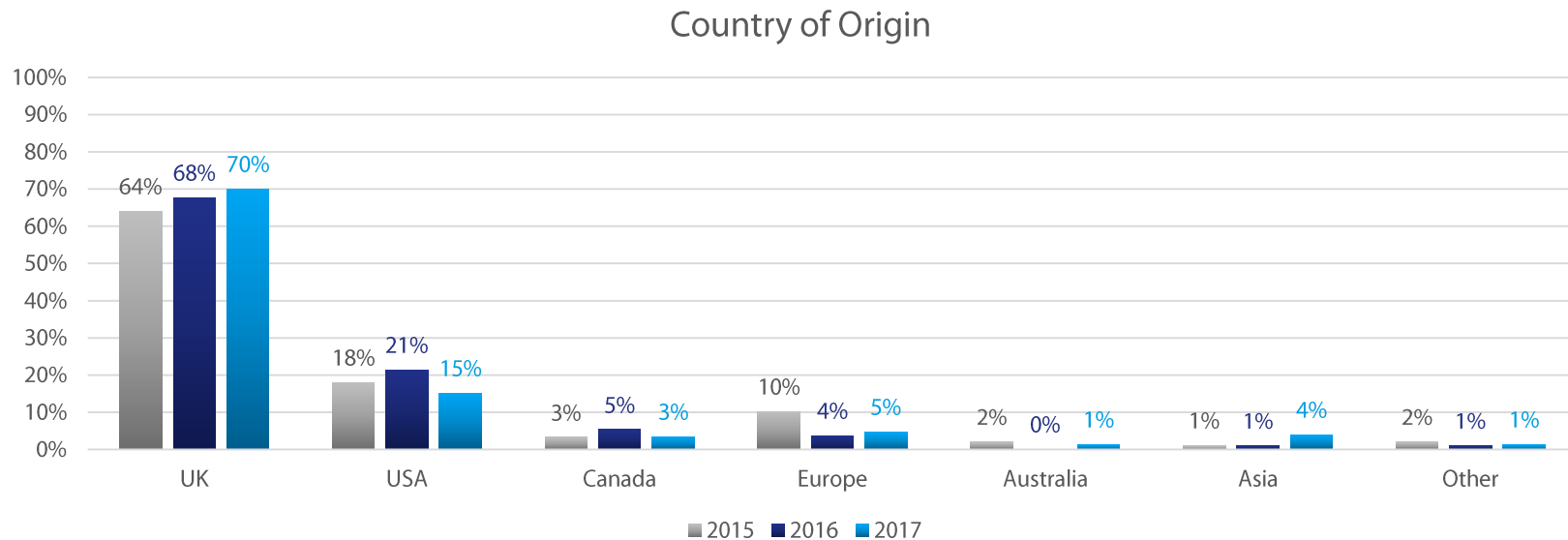


Age Profile



# PROFILE OF SURVEY RESPONDENTS: COUNTRY OF ORIGIN

The majority of survey respondents were from the UK, though almost 20% were from North America and Europe. The profile of survey respondents is very similar to previous years.

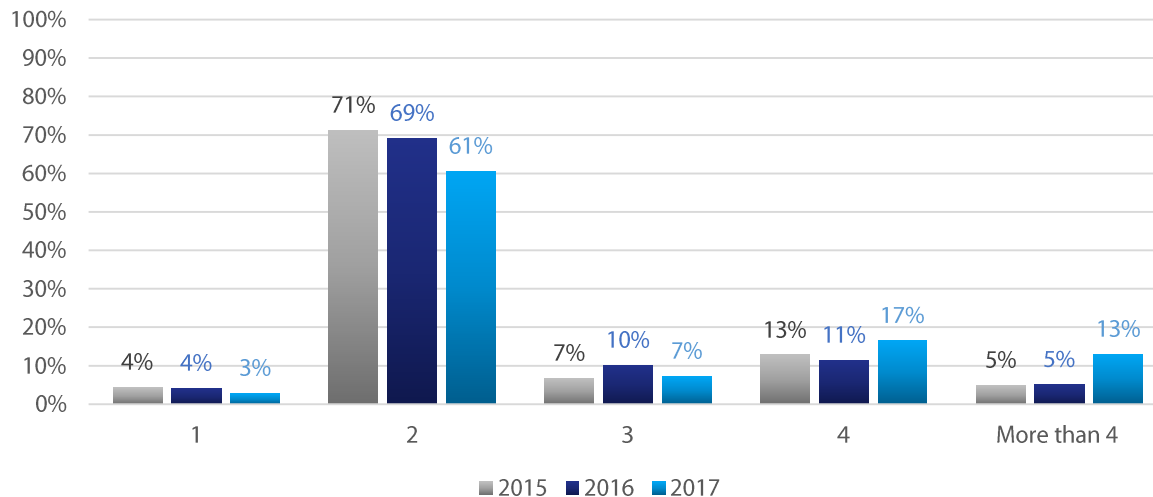


# PROFILE OF SURVEY RESPONDENTS: PARTY SIZE & VISITOR TYPE

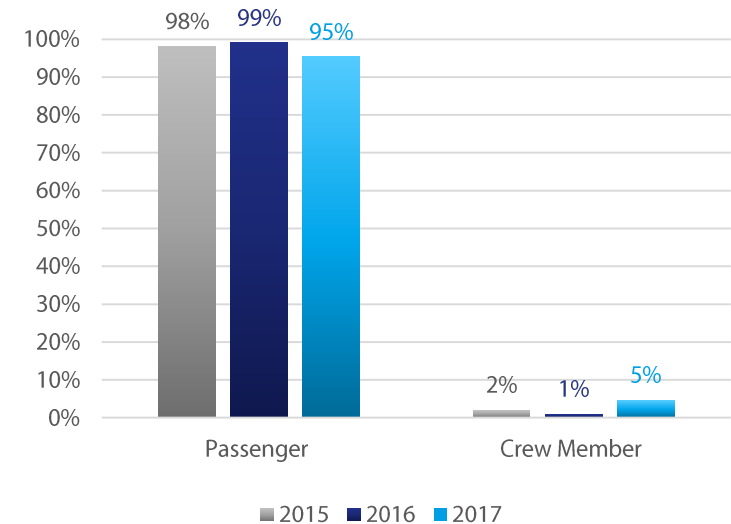
There was a slight increase in the average party size in 2017. The average party size amongst those surveyed was 2.8 people per party in 2017, compared to 2.4 people per party in 2015 and 2016.

The vast majority of survey respondents were passengers, though a small number of crew also responded to the survey.

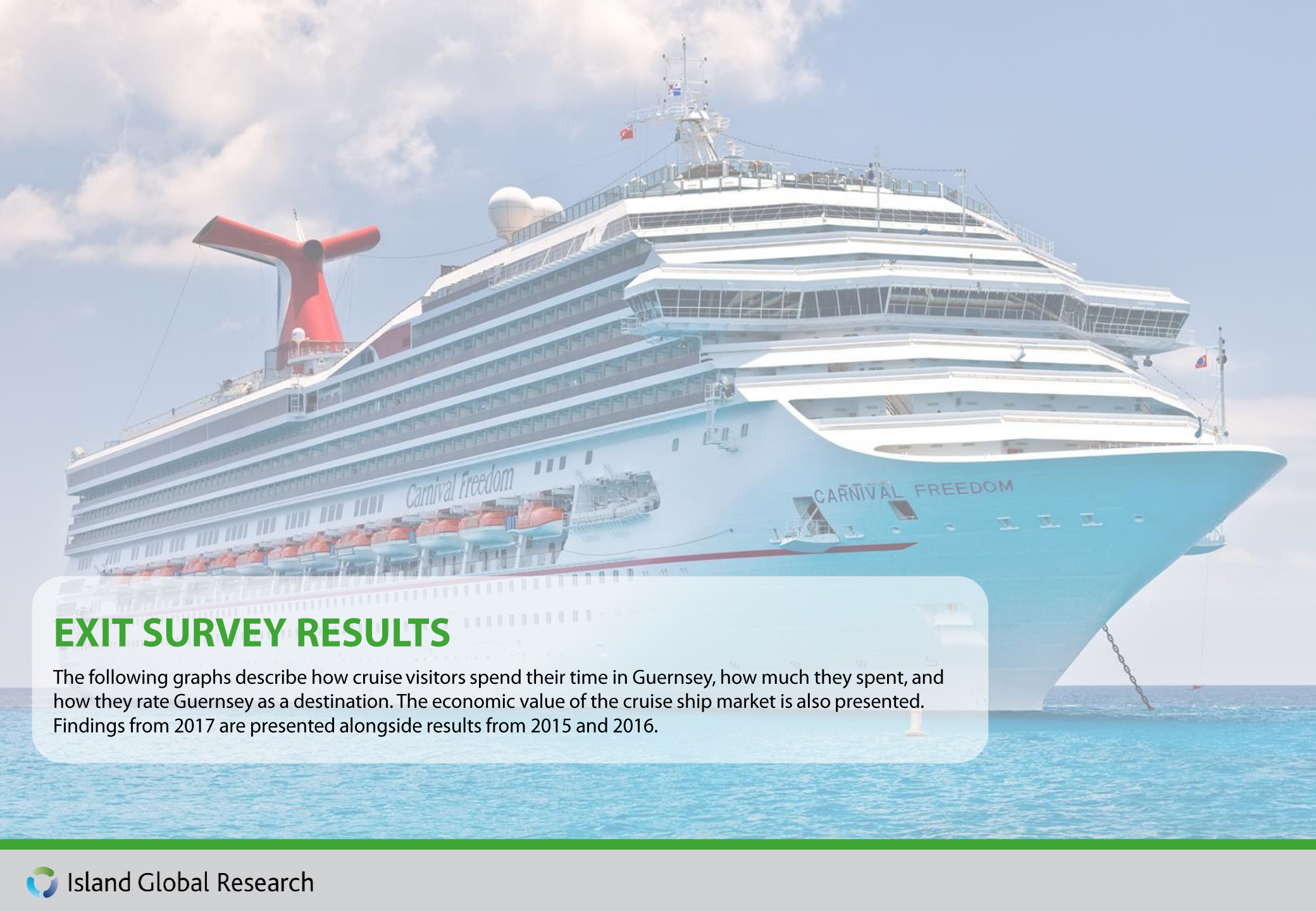
### Party Size



### Visitor Type







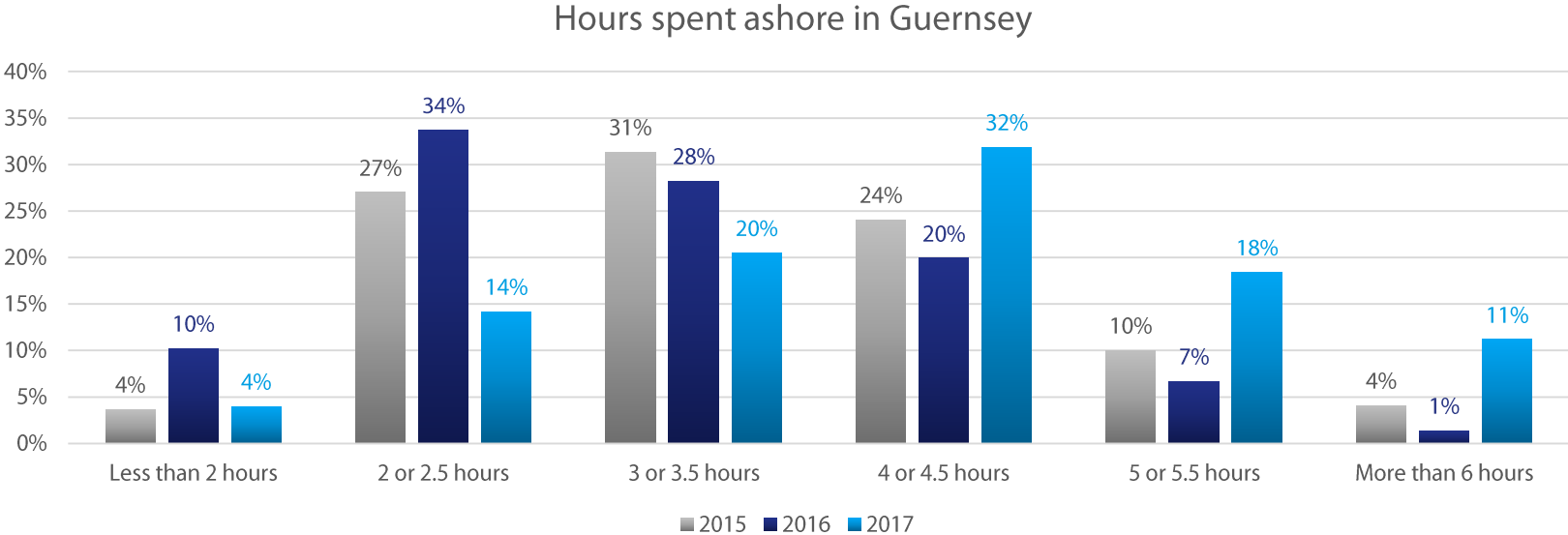
## EXIT SURVEY RESULTS

The following graphs describe how cruise visitors spend their time in Guernsey, how much they spent, and how they rate Guernsey as a destination. The economic value of the cruise ship market is also presented. Findings from 2017 are presented alongside results from 2015 and 2016.

# VISITORS SPENT MORE TIME ASHORE

Visitors who were leaving Guernsey to return to the cruise ship, were asked to report how long they had spent in Guernsey (to the nearest half an hour).

There is a notable increase in the amount of time visitors spent in Guernsey in 2017 compared to previous years.

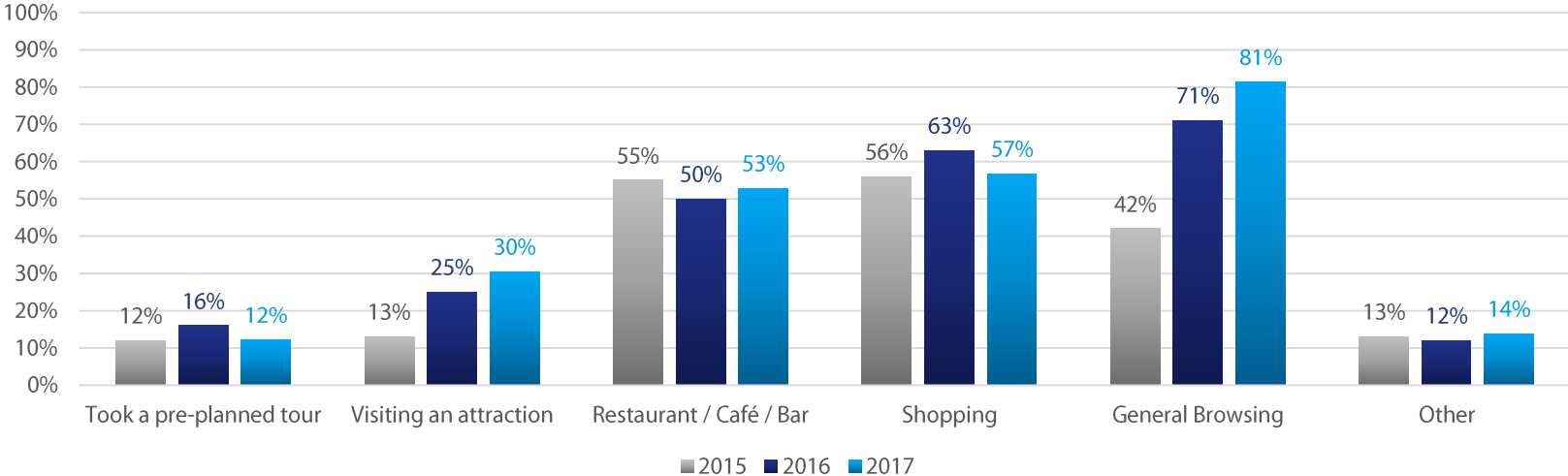


# ACTIVITIES UNDERTAKEN WHILST IN GUERNSEY

Visitors were asked to recall how they had spend their time in Guernsey.

Compared to previous years, there was a slight increase in the percentage of visitors who reported they had visited an attraction. The percentage of visitors who reported they had been to a restaurant, café, or bar, and who had been shopping were broadly similar. There was a slight increase in the percentage of people who indicated they had spent all or some of their time 'generally browsing'.

Activities whilst in Guernsey



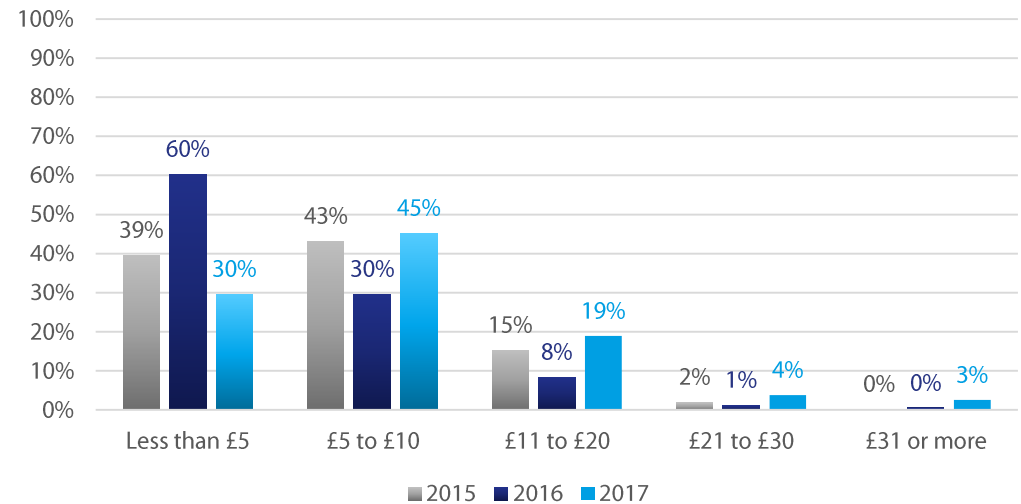
\* 'Visiting an attraction' includes Le Petit Train, the museums and visiting churches.

# SPENDING BY CRUISE VISITORS IN GUERNSEY

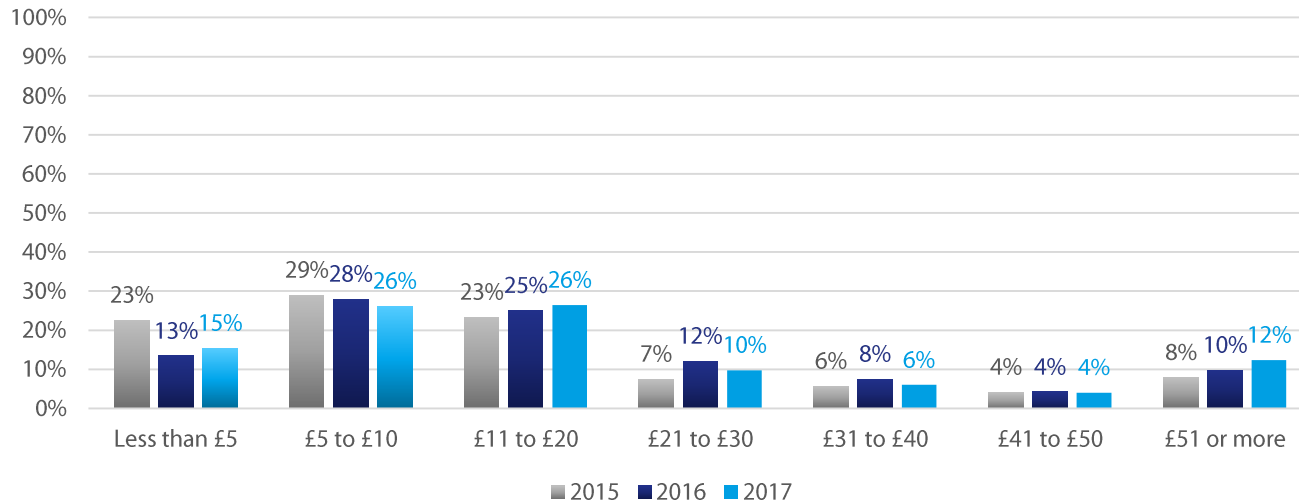
Visitors were asked how much they had spent whilst ashore.

- 74% of visitors reported they had spent on food and drink in a restaurant, café or bar, and most people spent less than £10 per person.

Spend per person in Restaurants, Cafés & Bars



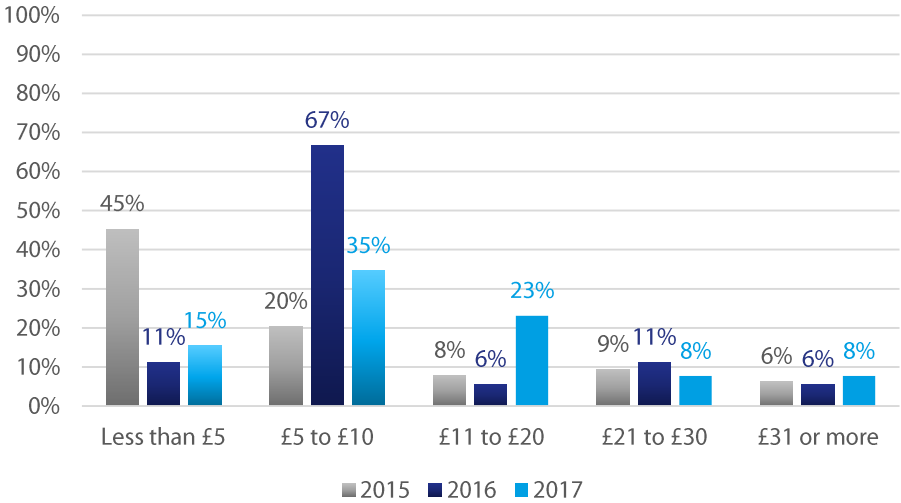
Spend per person on Retail



- 70% of visitors reported they had spent on retail. The majority of respondents spent less than £20 per person, though there were some visitors who spent substantially more.
- 10% bought jewellery / watches, and this included some items costing more than £1,000. 31% purchased clothing/footwear and 23% bought souvenirs. Other items purchased included perfume and cosmetics.

# SPENDING ON TOURS, ATTRACTIONS & OTHER CATEGORIES

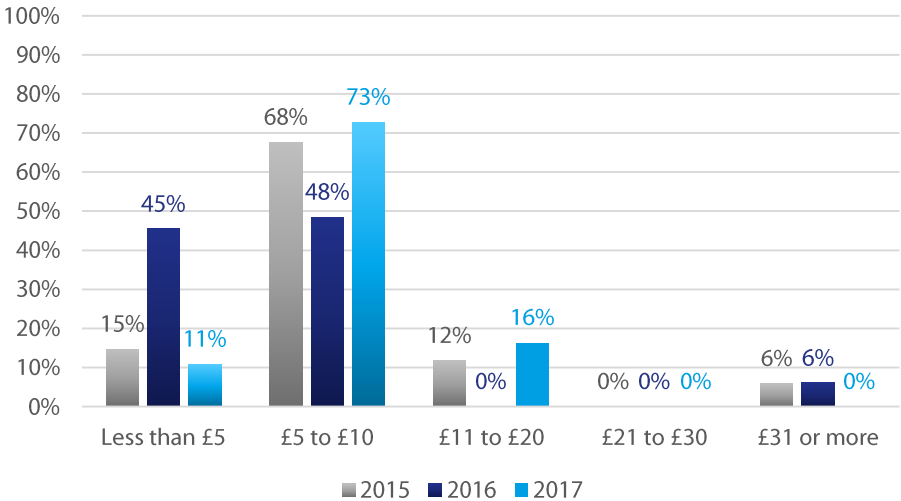
Spend per person on Tours whilst ashore



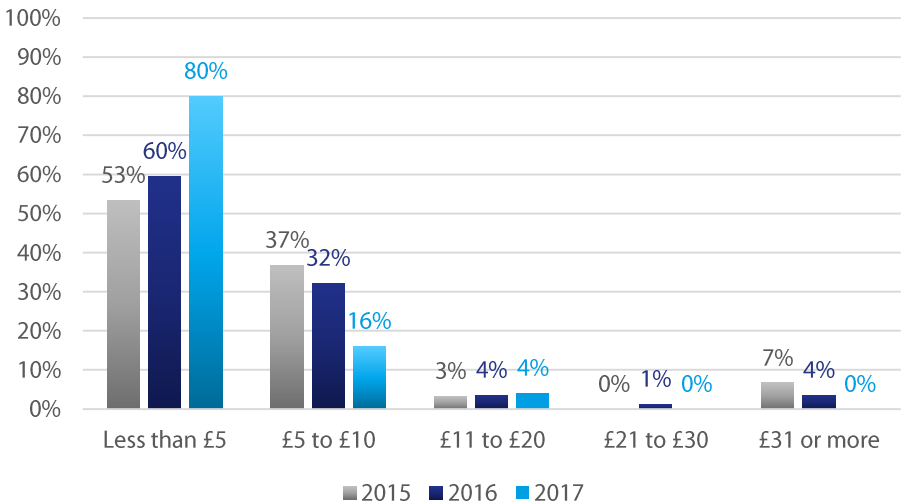
Visitors were asked how much they had spent whilst ashore.

- 12% of visitors pre-booked a tour, and a further 8% reported they had spent money on a tour (including private hire taxis) whilst ashore. The graph shows the amount spent on tours whilst ashore. Spend on this category has increased slightly each year, and may be explained by the number of visitors using taxis whilst in Guernsey.
- 13% of visitors spent money visiting an attraction. Popular attractions included Castle Cornet, Le Petit Train & Hauteville House.

Spend per person on Attractions in Guernsey

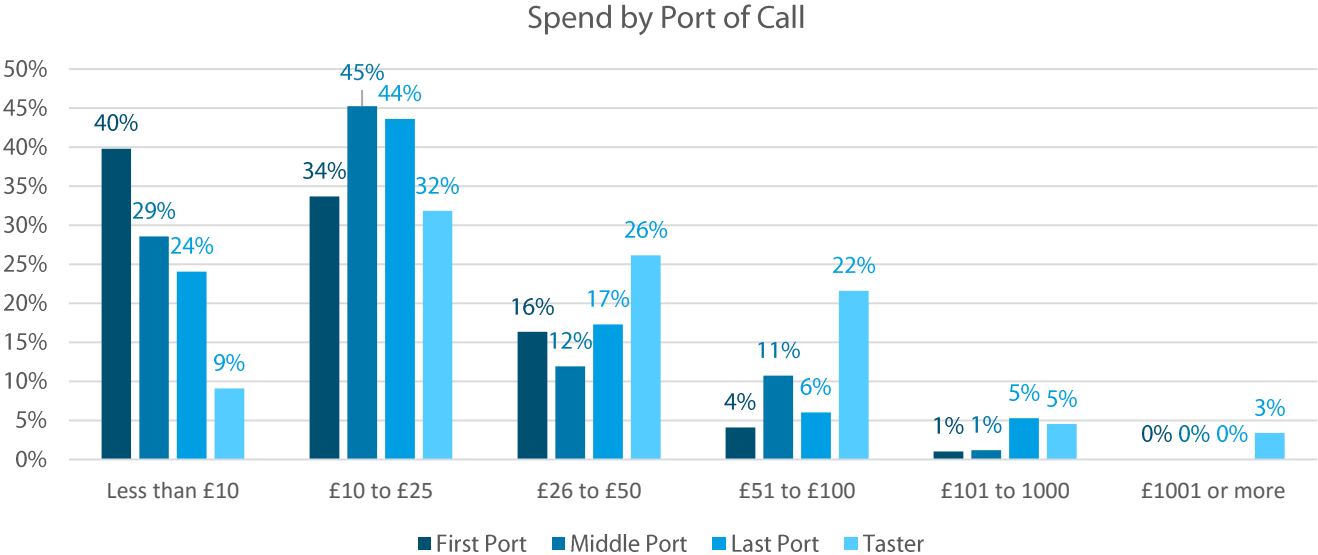


Spend per person on 'other' whilst ashore



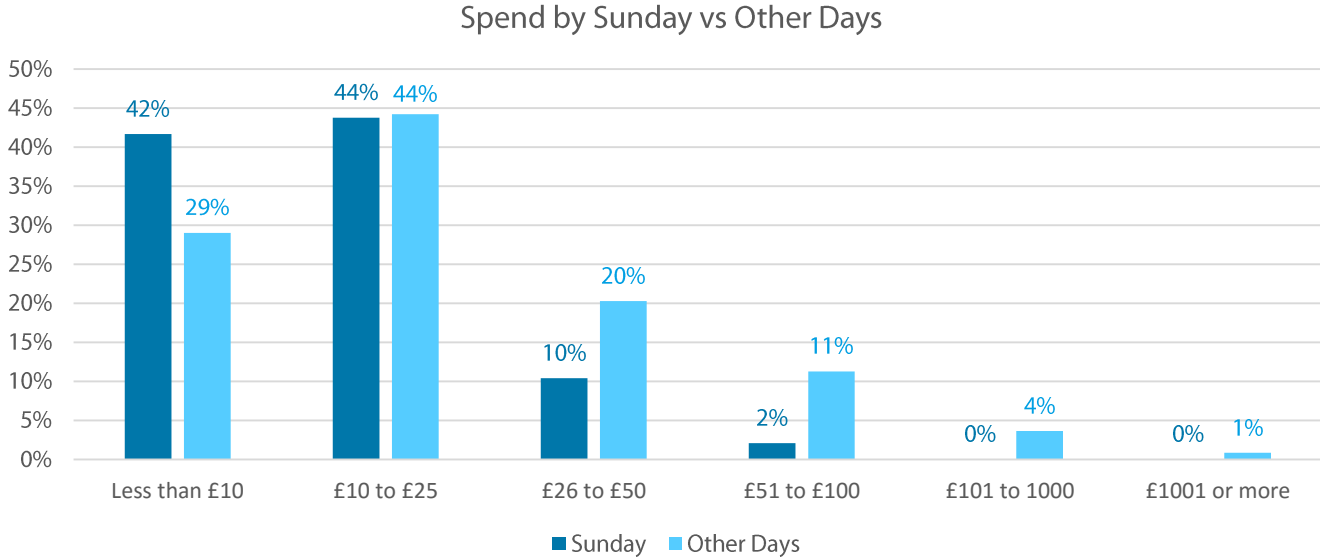
# SPENDING BY CRUISE VISITORS IN GUERNSEY

The following chart shows the total spend by 'port of call' (at which point Guernsey was visited within the ship's destination itinerary). The figures show that when Guernsey was the first port of call, visitors spent smaller amounts whereas when Guernsey was the last port of call, higher amounts were spent. This is likely to be because visitors have money left over on their cruise budget so they have used it at the last destination. Passengers on the taster cruises have spent a high amount of money in Guernsey, although it must be made clear that there were a small amount of passengers that purchased expensive items, which has pushed the percentages up for the higher sums of money.



# SPENDING BY CRUISE VISITORS IN GUERNSEY

Closer analysis has been made on the spend made by passengers who visited Guernsey on a Sunday compared to those who visited on another day of the week. The chart below shows that more money was spent on the other days. This could be due to shops being shut on Sundays so there were less places for passengers to purchase anything or maybe the items bought (perhaps from stalls at the Seafront Sundays), were of a lower value to clothing stores etc.



# ESTIMATED ECONOMIC VALUE OF THE CRUISE VISITORS

Cruise visitors contributed just over £4 million to Guernsey's economy in 2017.

The economic value of the cruise market was lower than in 2016 because there were fewer visitors. The exit survey does not explain why there were fewer cruise visitors, though we noted a number of cruise ships were cancelled or unable to disembark due to the weather. The average spend per cruise visitor was higher than in previous years, and this is likely to reflect the longer time spent ashore.

	2015			2016			2017		
<b>Number of cruise visitors who came ashore</b>	122,700			133,000			110,288		
<b>CATEGORY OF SPEND</b>	Average spend per person	% who spent on category	Overall value	Average spend per person	% who spent on category	Overall value	Average spend per person	% who spent on category	Overall value
<b>Retail</b>	£24.94	56%	£1.71 m	£32.02	71%	£3.02 m	£36.65	70%	£2.81 m
<b>Restaurants, Cafés &amp; Bars</b>	£15.94	86%	£1.68 m	£5.65	70%	£0.53 m	£8.88	74%	£0.72 m
<b>Tours (incl. pre-booked)</b>	£15.86	12%	£0.23 m	£22.14	18%	£0.53 m	£16.89	20%	£0.36 m
<b>Attractions</b>	£10.05	13%	£0.16 m	£7.02	4%	£0.04 m	£7.67	13%	£0.11 m
<b>Other</b>	£8.12	13%	£0.13 m	£4.96	10%	£0.06 m	£2.64	8%	£0.02 m
<b>TOTAL</b>	<b>£31.95</b>		<b>£3.91 m</b>	<b>£31.45</b>		<b>£4.18m</b>	<b>£36.46</b>		<b>£4.02 m</b>



# VISITOR OPINIONS OF GUERNSEY

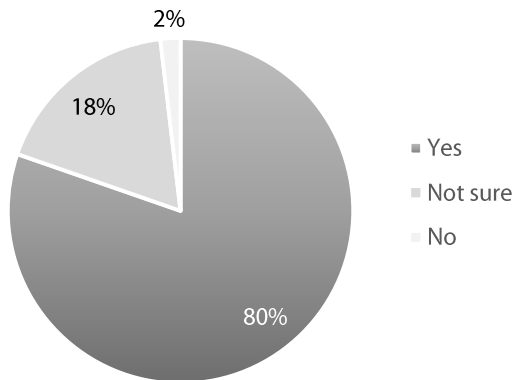
Visitors were asked to rate different aspects of Guernsey on a scale of 1 to 5, with 1 = very poor, and 5 = excellent. Guernsey remains highly rated across a range of dimensions.

	2015	2016	2017
<b>Guernsey in general</b>	<b>4.9</b>	<b>4.8</b>	<b>4.8</b>
<b>Restaurants, Cafés &amp; Bars</b>	4.5	4.5	4.4
<b>Shops / Retail</b>	4.6	4.6	4.4
<b>Attractions</b>	4.7	4.7	4.8
<b>Cleanliness</b>	4.8	4.8	4.8
<b>Safety &amp; Security</b>	Not asked	4.8	4.6

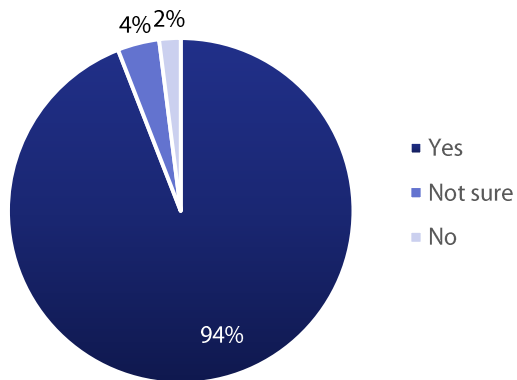
# LIKELIHOOD OF RETURNING TO GUERNSEY

Finally, respondents were asked if they were likely to return to Guernsey. In 2017, 90% of respondents reported that they would return to Guernsey, this was a slight decrease compared to last year but remains a highly positive response.

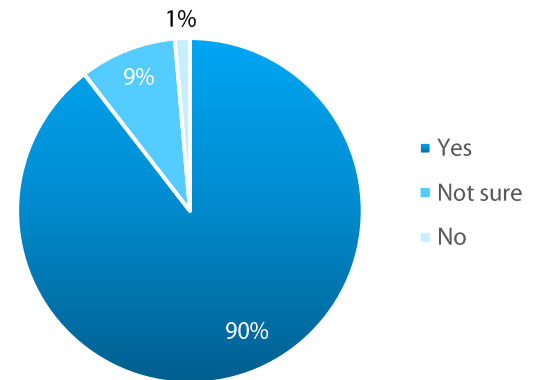
Likelihood of visiting Guernsey again (2015)



Likelihood of visiting Guernsey again (2016)



Likelihood of visiting Guernsey again (2017)





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