

Guernsey Travel Survey

Quarter 2 2019

Issue date July 2019

The Guernsey Travel Survey shows the number of air and sea passengers, broken down by type, purpose and origin, based upon exit surveys undertaken at the airport and harbour



States of Guernsey
Data and Analysis

1.1 Introduction

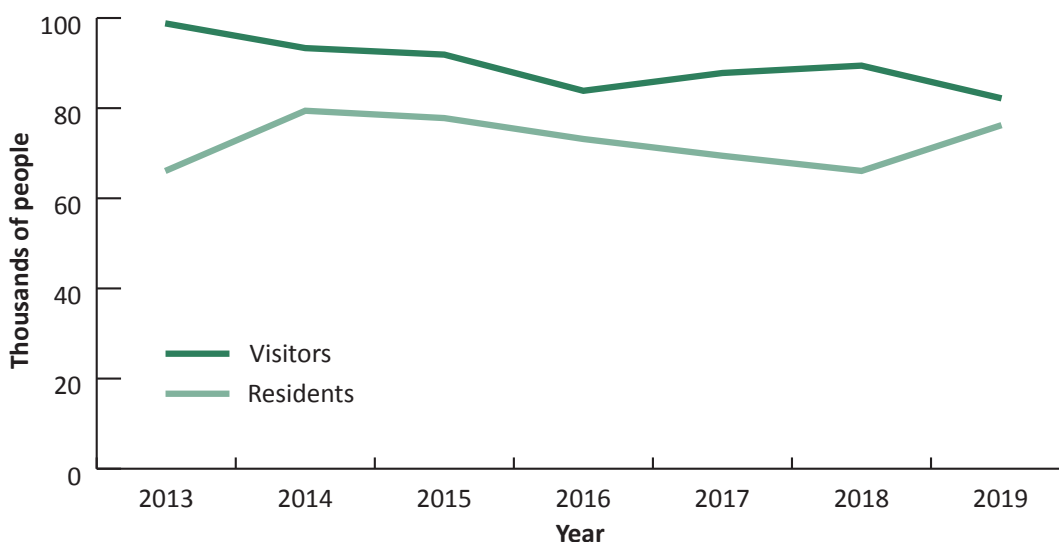
The Guernsey Travel Survey is based upon exit surveys undertaken at the airport and harbour, with the findings applied to the actual numbers of passengers (provided by the airport and harbour authorities). The methodology is more fully explained in [section 7.1](#) on [page 20](#). The purpose of these surveys is to determine the passenger composition of Guernsey's main air and sea routes, along with the number of visiting cruise passengers and visiting yachtsmen. It includes information on length of stay, purpose of visit, accommodation used, country of origin and party size.

It should be noted that the figures in this report do not include inter-Bailiwick travel (Alderney, Sark and Herm). From April 2017 the methodology for data collection was updated. Planning and deployment of interview shifts changed from quarterly to monthly, hence year on year figures are subject to methodological changes and may not be strictly comparable.

1.2 Headlines for Q2 2019

- The total number of departing passengers (both visitors and residents), not including cruise or yacht passengers, for Q2 2019 was 158,384, an increase of 2% when compared with Q2 2018.
- The total number of departing visitors (including cruise and yacht passengers) increased by 2% from Q2 2018 to Q2 2019.
- The total number of departing visitors, not including cruise and yacht passengers, for Q2 2019 was 82,226. The total number of departing residents was 76,158 in Q2 2019.
- 10% of visitors stayed for business purposes, 16% were visiting friends or relatives, 55% were leisure visitors staying for at least one night and a further 17% visiting for a day trip.
- The average length of stay for those who stayed at least one night in Q2 2019 was 4.41 nights.
- 62% of visitors during Q2 2019 were from the UK, 14% from France, 6% from Jersey and the remainder from elsewhere.

Figure 1.2.1 Q2 departing passenger numbers



1.3 Summary for Q2 2019

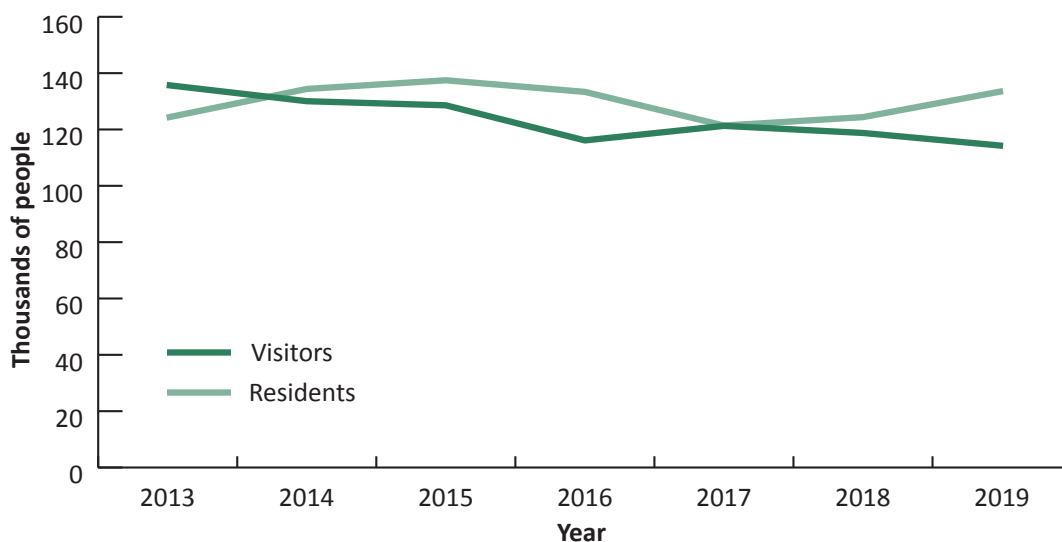
Table 1.3.1 Summary of Q2 2019 results compared with Q2 2018

	Q2 2018	Q2 2019	% change
Total departing visitors (incl. cruise & yacht)	149,006	152,462	+2
Total departing visitors (excl. cruise & yacht)	89,434	82,226	-8
Total departing residents	66,071	76,158	+15
Total departing passengers (incl. cruise & yacht)	215,077	228,620	+6
Total departing passengers (excl. cruise & yacht)	155,505	158,384	+2
Total returning visitors	613	766	+25
Total passengers (incl. cruise & yacht)	215,689	229,386	+6
Total passengers (excl. cruise & yacht)	156,117	159,150	+2
Departing visitors by air	53,977	49,519	-8
Departing visitors by sea	35,457	32,707	-8
Visitors staying for leisure purposes	46,668	45,334	-3
Visitors staying with friends / relatives	13,937	13,372	-4
Visitors staying for business purposes	9,550	7,966	-17
Visitors staying for other/unknown purposes	2,033	1,136	-44
Total staying visitors (excluding long stay)	72,187	67,809	-6
Long stay visitors	315	391	+24
Average length of stay (excluding long stay)	4.52 nights	4.41 nights	-2
Total number of bed nights	326,289	298,235	-9
Total staying in commercial accommodation	59,951	55,718	-7
Average stay in commercial accommodation	4.34 nights	4.20 nights	-3
Bed nights in commercial accommodation	260,213	234,180	-10
Day visitors for leisure purposes	11,071	9,151	-17
Day visitors with friends / relatives	226	278	+23
Day visitors for business purposes	2,772	2,744	-1
Day visitors for other/unknown purposes	2,862	1,853	-35
Total day visitors	16,931	14,026	-17
Visitors from the UK	62,610	51,072	-18
Visitors from France	9,737	11,165	+15
Visitors from Jersey	5,005	5,054	+1
Visitors from elsewhere	12,078	14,936	+24
Cruise ship passengers	53,066	64,364	+21
Visiting yachtsmen	6,506	5,872	-10
Departing Guernsey residents by air	47,641	58,397	+23
Departing Guernsey residents by sea	18,431	17,761	-4
Net Promoter Score	57.4	60.3	+5

1.2 Headlines for January to June 2019

- The total number of departing passengers (both visitors and residents), not including cruise or yacht passengers, for January to June 2019 was 249,029, an increase of 2% when compared with January to June 2018.
- The total number of departing visitors (including cruise and yacht passengers) increased by 8% from January to June 2018 to the same period in 2019.
- The total number of departing visitors, not including cruise and yacht passengers, for January to June 2019 was 114,232. The total number of departing residents was 133,568 in January to June 2019.
- Of the 114,232 departing visitors in January to June 2019, 67% travelled by air and 33% by sea.
- 14% of visitors stayed for business purposes, 20% were visiting friends or relatives, 46% were leisure visitors staying for at least one night and a further 18% visiting for a day trip.
- The average length of stay for those who stayed at least one night in January to June 2019 was 4.38 nights.
- 65% of visitors during January to June 2019 were from the UK, 11% from France, 9% from Jersey and the remainder from elsewhere.

Figure 1.2.1 Q2 departing passenger numbers



1.3 Summary for January to June 2019

Table 1.3.1 Summary of January to June 2019 results compared with January to June 2018

	January to June 2018	January to June 2019	% change
Total departing visitors (incl. cruise & yacht)	171,830	184,805	+8
Total departing visitors (excl. cruise & yacht)	118,764	114,232	-4
Total departing residents	124,386	133,568	+7
Total departing passengers (incl. cruise & yacht)	296,216	318,373	+7
Total departing passengers (excl. cruise & yacht)	243,150	247,800	+2
Total returning visitors	1,047	1,229	+17
Total passengers (incl. cruise & yacht)	297,263	319,602	+8
Total passengers (excl. cruise & yacht)	244,197	249,029	+2
Departing visitors by air	78,977	76,345	-3
Departing visitors by sea	39,787	37,887	-5
Visitors staying for leisure purposes	52,892	52,933	0
Visitors staying with friends / relatives	22,489	22,919	+2
Visitors staying for business purposes	17,374	15,458	-11
Visitors staying for other/unknown purposes	2,753	2,022	-27
Total staying visitors (excluding long stay)	95,509	93,331	-2
Long stay visitors	976	842	-14
Average length of stay (excluding long stay)	4.50 nights	4.38 nights	-3
Total number of bed nights	429,731	409,040	-5
Total staying in commercial accommodation	75,003	72,389	-3
Average stay in commercial accommodation	4.10 nights	3.98 nights	-3
Bed nights in commercial accommodation	307,444	287,982	-6
Day visitors for leisure purposes	12,188	10,924	-10
Day visitors with friends / relatives	456	561	+23
Day visitors for business purposes	5,956	6,234	+5
Day visitors for other/unknown purposes	3,677	2,341	-36
Total day visitors	22,277	20,059	-10
Visitors from the UK	83,177	73,907	-11
Visitors from France	10,787	11,960	+11
Visitors from Jersey	9,188	10,297	+12
Visitors from elsewhere	15,607	18,068	+16
Cruise ship passengers	53,066	64,364	+21
Visiting yachtsmen	6,782	6,209	-8
Departing Guernsey residents by air	98,098	108,860	+11
Departing Guernsey residents by sea	26,289	24,708	-6
Net Promoter Score	52.7	57.6	+9

2.1 Total departing passengers Q2

Table 2.1.1 Q2 total departing passengers by mode of transport

Year	Number by air	Number by sea
2015	105,693	63,981
2016	105,062	51,943
2017	103,758	53,476
2018	101,617	53,889
2019	107,916	50,468

Table 2.1.2 Q2 total departing passengers by air and by type

	Number of Visitors	Number of Residents
2015	52,132	53,561
2016	51,526	53,536
2017	51,927	51,831
2018	53,977	47,641
2019	49,519	58,397

Table 2.1.3 Q2 total departing passengers by sea and by type

	Number of Visitors	Number of Residents
2015	39,748	24,233
2016	32,324	19,619
2017	35,874	17,602
2018	35,457	18,431
2019	32,707	17,761

As shown in **Table 2.1.1**, in Q2 2019 there were 107,916 departing passengers by air and 50,468 by sea (these figures include returning visitors). This represents a 6% increase in air passenger numbers and a 6% decrease in sea passengers since Q2 2018.

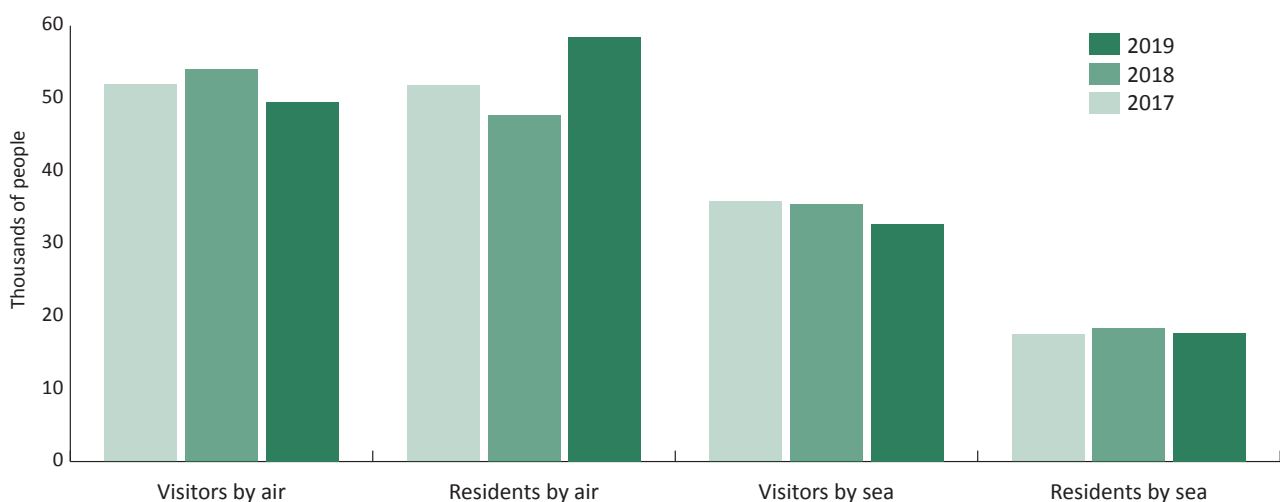
Tables 2.1.2 and **2.1.3** show the number of departing residents and departing visitors by mode of transport (except those visitors who were returning to Guernsey after, for example, a day trip elsewhere).

Table 2.1.4 shows the percentages of departing visitors, returning visitors and residents during Q2.

Table 2.1.4 Q2 total departing passengers by type of passenger

	Number of passengers	% departing visitors	% returning visitors	% residents
2015	169,798	54	<1	46
2016	157,451	53	<1	47
2017	157,541	56	<1	44
2018	156,118	57	<1	42
2019	159,150	52	<1	48

Figure 2.1.1 Q2 total departing passengers by type and by mode of transport



2.2 Total departing passengers January to June

Table 2.2.1 January to June total departing passengers by mode of transport

Year	Number by air	Number by sea
2015	189,604	76,445
2016	189,004	60,465
2017	177,449	65,223
2018	177,074	66,076
2019	185,205	62,595

Table 2.2.2 January to June total departing passengers by air and by type

	Number of Visitors	Number of Residents
2015	82,851	106,753
2016	80,497	108,507
2017	80,732	96,717
2018	78,977	98,098
2019	76,345	108,860

Table 2.2.3 January to June total departing passengers by sea and by type

	Number of Visitors	Number of Residents
2015	45,734	30,711
2016	35,623	24,842
2017	40,553	24,670
2018	39,787	26,289
2019	37,887	24,708

As shown in **Table 2.2.1**, in January to June 2019 there were 185,205 departing passengers by air and 62,595 by sea (these figures include returning visitors). This represents a 5% increase in air passenger numbers and a 5% decrease in sea passengers since the same period in 2018.

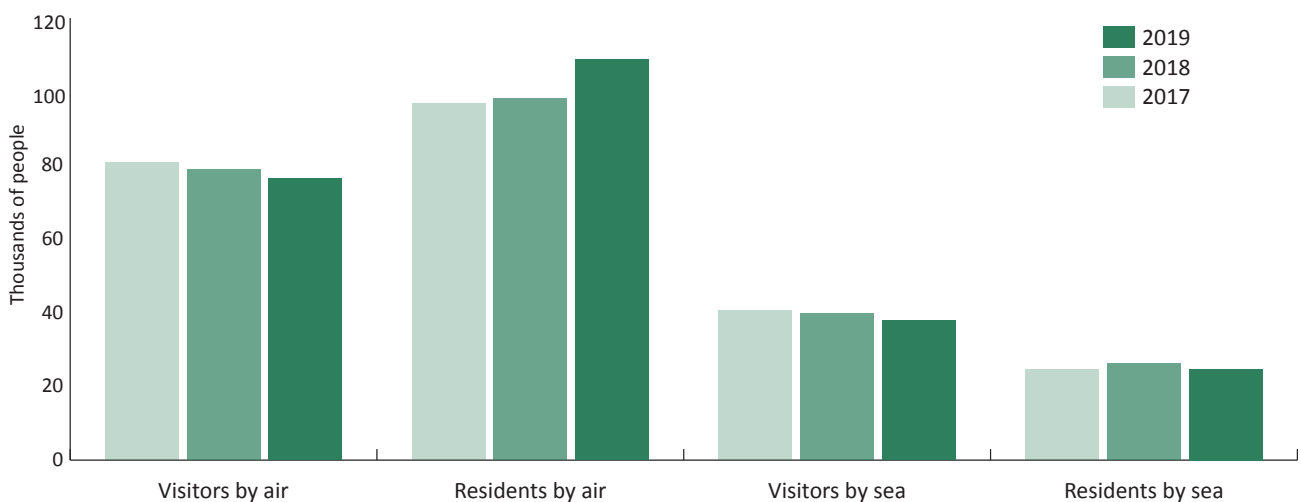
Tables 2.2.2 and **2.2.3** show the number of departing residents and departing visitors by mode of transport (except those visitors who were returning to Guernsey after, for example, a day trip elsewhere).

Table 2.2.4 shows the percentages of departing visitors, returning visitors and residents during January to June.

Table 2.2.4 January to June total departing passengers by type of passenger

	Number of passengers	% departing visitors	% returning visitors	% residents
2015	266,479	48	<1	52
2016	250,115	46	<1	53
2017	243,346	50	<1	50
2018	244,197	49	<1	51
2019	249,029	46	<1	54

Figure 2.2.1 January to June total departing passengers by type and by mode of transport



2.3 Departing visitors Q2 - by purpose of visit

Table 2.3.1 shows the number of departing visitors during Q2 2019 broken down by purpose of visit. In Q2 2019 the highest proportion of visitors were staying leisure visitors (55%), followed by people visiting friends or family (16%).

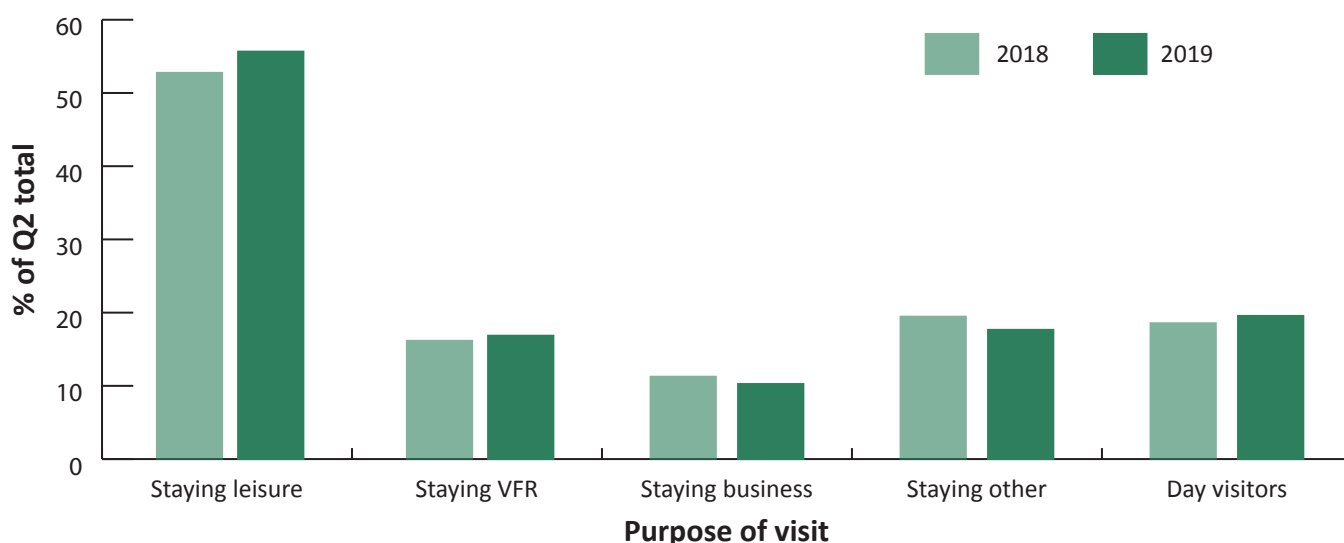
In Q2 2018 the respective percentages were 52% and 16%.

The total number of day visitors during Q2 was 14,026 in 2019, 17% of total visitors. The equivalent figure in Q2 2018 was 16,931, which was 19% of the total visitors for that period.

Table 2.3.1 Q2 departing visitors by purpose of visit

Purpose	2018		2019	
	Number	%	Number	%
Staying leisure	46,668	52	45,334	55
Visiting friends / relatives	13,937	16	13,372	16
Staying business	9,550	11	7,966	10
Staying other / unknown	2,033	2	1,136	1
Day visit leisure	11,071	12	9,151	11
Day visit friends / relatives	226	<1	278	<1
Day visit business	2,772	3	2,744	3
Day visit other / unknown	2,862	3	1,853	2
Long stay visitors	315	<1	391	<1
TOTAL	89,434	100	82,226	100

Figure 2.3.1 Q2 departing visitors by purpose of visit



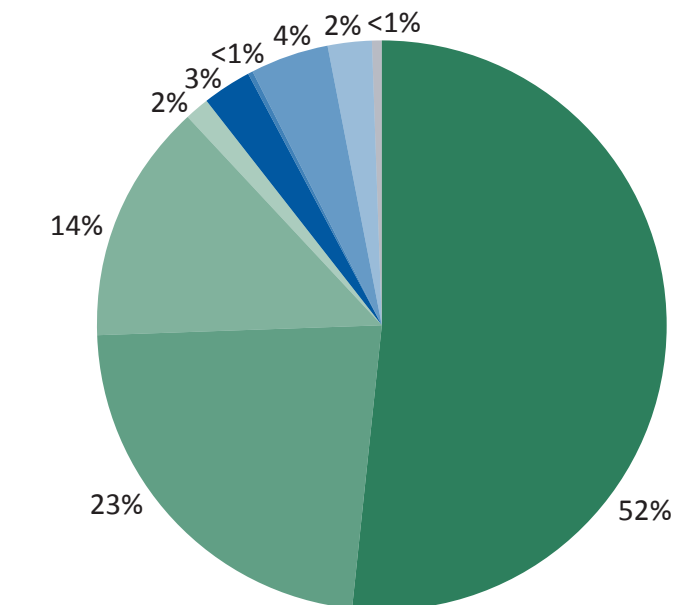
2.3 Departing visitors Q2 - by purpose of visit (continued)

Table 2.3.2 shows the number of departing visitors during Q2 2019 broken down by mode of transport and purpose of visit. In Q2 2019 the highest proportion of visitors both by air and by sea were staying leisure visitors.

Table 2.3.2 Q2 departing visitors by mode of transport and purpose of visit

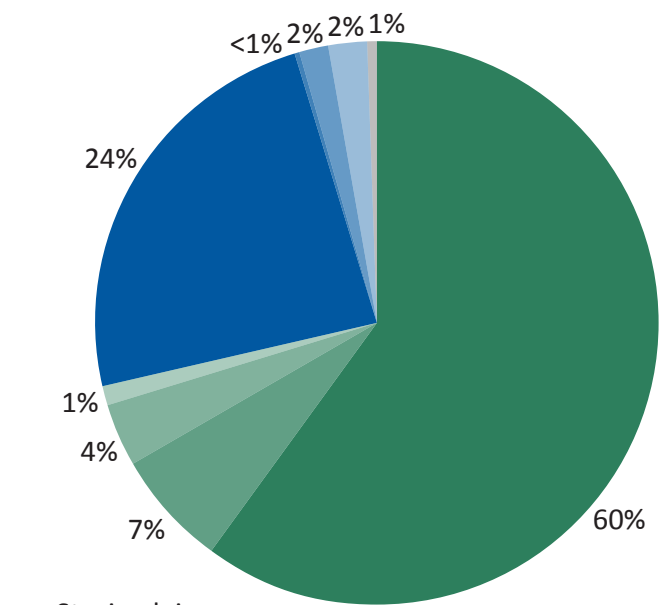
Purpose	By air	By sea
Staying leisure	25,644	19,690
Visiting friends / relatives	11,225	2,148
Staying business	6,738	1,228
Staying other/unknown	808	329
Day visit leisure	1,321	7,829
Day visit friends / relatives	182	96
Day visit business	2,179	565
Day other/unknown	1,202	651
Long stay visitors	220	171
TOTAL	49,519	32,707

Figure 2.3.2 Q2 2019 departing visitors by air - purpose of visit



- Staying leisure
- Staying with friends / relatives
- Staying business
- Staying other/unknown
- Day trip leisure
- Day trip friends / relatives
- Day trip business
- Day trip other/unknown
- Long stay

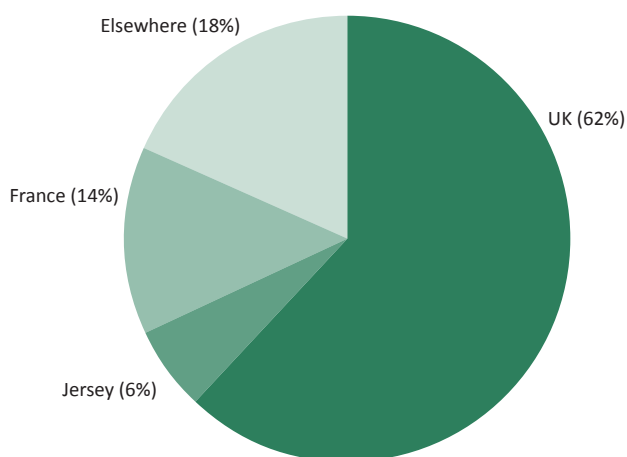
Figure 2.3.3 Q2 2019 departing visitors by sea - purpose of visit



- Staying leisure
- Visiting friends / relatives
- Staying business
- Staying other/unknown
- Day trip leisure
- Day trip friends / relatives
- Day trip business
- Day trip other/unknown
- Long stay

2.4 Departing visitors Q2 - by country of residence

Figure 2.4.1 Q2 2019 departing visitors by country of residence



The majority of visitors during Q2 2019 were from the UK, as can be seen in **Figure 2.4.1** and **Table 2.4.1**.

Within the “Elsewhere” category, the most common countries were Germany, the Netherlands and the USA.

Table 2.4.1 Q2 percentage of departing visitors by country of residence

	UK	Jersey	France	Elsewhere
2015	69	11	7	14
2016	67	10	10	12
2017	68	9	11	12
2018	70	6	11	14
2019	62	6	14	18

2.5 Departing visitors Q2 - by accommodation and length of stay

Table 2.5.1 Q2 2019 departing visitors by type of accommodation

	2019	% of total
Hotel	46,156	68
Guest accom.	2,085	3
Self catering	4,775	7
Camping	870	1
Friends/relatives	11,906	18
Other	1,832	3

More people stayed in hotel accommodation than in any other type of accommodation in Q2 2019 (68%) (Table 2.5.1).

The overall average length of stay was 4.41 nights in Q2 2019.

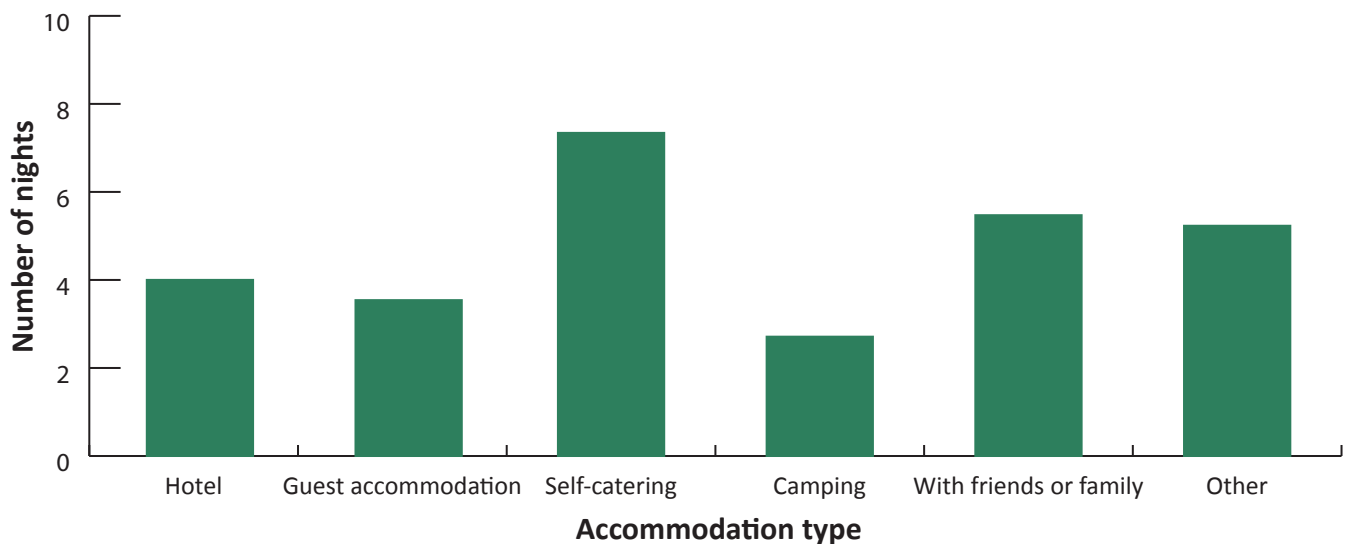
In total there were 298,235 overnight stays in Q2 2019, of which 234,180 were in commercial accommodation.

Table 2.5.2 Q2 2019 average length of stay (number of nights)

	Average length of stay
2015	4.66
2016	4.35
2017	4.44
2018	4.52
2019	4.41

In Q2 2018 these figures were 326,289 and 260,213, giving reductions of 9% and 10% respectively.

Figure 2.5.1 Average length of stay by accommodation type Q2 2019



2.6 Departing visitors Q2 - day visitors

Table 2.6.1 Q2 day visitors as percentage of total departing visitors

	Departing day visitors	Total departing visitors	Day visitors as % total departing visitors
2015	19,061	91,879	21
2016	17,196	83,850	21
2017	16,170	87,801	18
2018	16,984	89,434	19
2019	14,026	82,226	17

The majority of departing visitors on a day trip were travelling by sea (75% in Q2 2019).

As a percentage of overall departing visitors, day visitors comprised 17% of the total (**Table 2.6.1**).

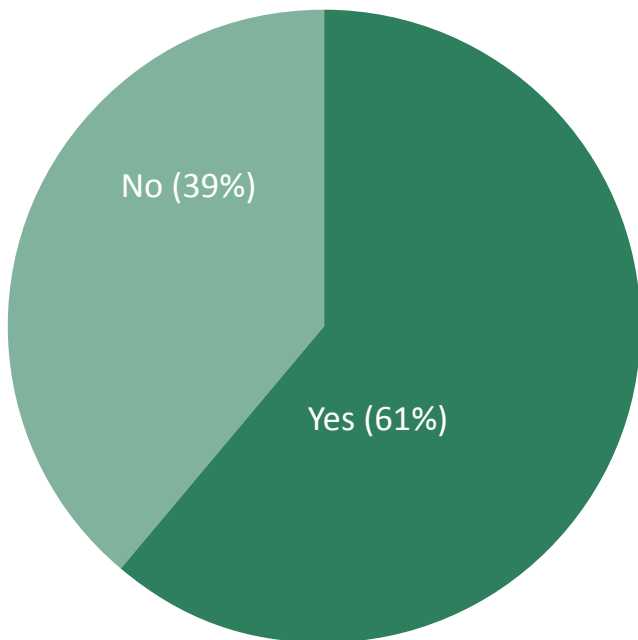
Table 2.6.2 shows that 75% of day visits were for leisure purposes, and 23% for business purposes.

Table 2.6.2 Q2 day visitors

	2019	
	Number	%
Day visit leisure	9,151	75
Day visit friends / relatives	278	2
Day visit business	2,744	23
Day visit other	1,853	15
Total day visitors	14,026	

2.7 Previous visits to Guernsey - Q2 2019

Figure 2.7.1 Q2 visitors who had visited Guernsey previously



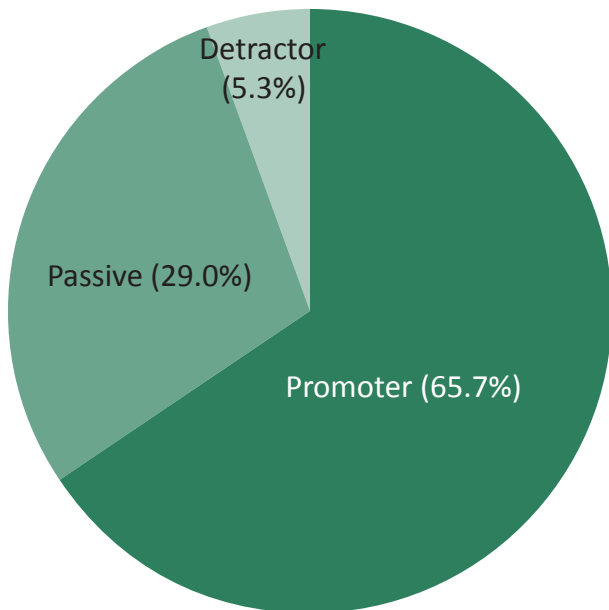
Respondents were asked if they had visited Guernsey before and, if so, had they visited on a cruise ship.

In Q2 2019, 61% of all visitors had been to Guernsey previously.

Of those who had visited previously, 3.2% had visited on a cruise ship.

3.1 Recommendations of Guernsey - Q2 2019

Figure 3.1.1 Q2 2019 breakdown of visitors likely to recommend Guernsey



Since 2014 visitors have been asked how likely they were, on a scale of 1 to 10, to recommend Guernsey to friends and family.

Those giving an answer of 9 or 10 were categorised as “promoters”, those giving 7 or 8 were “passives” and those giving 0 to 6 were “detractors” (**Table 3.1.1**). An overall net promoter score (NPS) was found by subtracting the proportion of detractors from the proportion of promoters.

In Q2 2019 the NPS was 60.3. This compares with 57.4 in Q2 2018.

A breakdown of promoters, passives and detractors is given in **Figure 3.1.1**.

Table 3.1.1 Q2 number of promoters, passives and detractors

	2019	
	Number	as %
Promoters	2,168	65.7
Passives	958	29.0
Detractors	176	5.3
Net Promoter Score		60.3

4.1 Departing residents - Q2

Table 4.1.1 Q2 departing residents

	Total number	as % of total departing passengers
2015	77,795	46
2016	73,155	47
2017	69,433	44
2018	66,071	42
2019	76,158	48

The number of departing residents was 76,158 in Q2 2019.

The majority of departing residents travelled by air (77%) as can be seen in **Table 4.1.2**.

Table 4.1.2 Q2 departing residents by mode of transport

	by air	by sea
2015	53,561	24,233
2016	53,536	19,619
2017	51,831	17,602
2018	47,641	18,431
2019	58,397	17,761

5.1 Onward flights

Residents and departing visitors were asked if they were flying onwards after their initial destination airport.

Table 5.1.1 shows that in Q2 2019, 20% of all passengers were flying on to another airport. 14,781 Guernsey residents (25% of total) and 6,897 departing visitors (14% of total) were flying onwards in the second quarter of 2019.

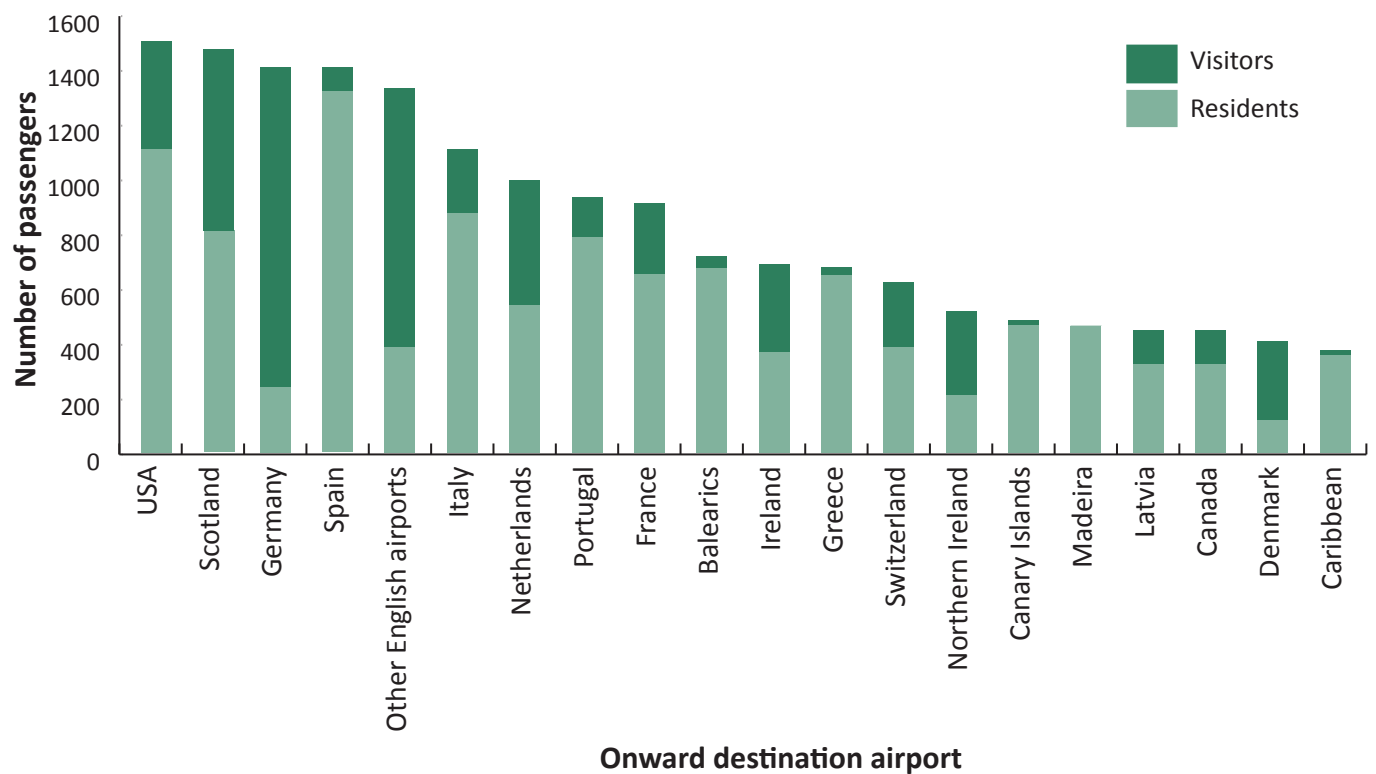
Table 5.1.1 Q2 Onward flights

Initial destination airport	Visitor departures	Visitors travelling onward	Resident departures	Residents travelling onward
Birmingham	1,595	157	1,636	355
Bristol	2,044	11	1,071	156
East Midlands	2,068	-	776	-
Exeter	2,155	74	1,700	70
Gatwick	14,935	2,763	25,687	11,328
Manchester	4,879	403	4,021	317
Southampton	8,216	1,788	9,940	1,168
Stansted	2,059	179	1,289	195
Heathrow	2,585	684	1,968	695
Other UK airports	2,124	11	1,044	51
Jersey	5,178	827	8,903	445
Foreign airports	1,682	-	364	-
Total	49,519	6,897	58,397	14,781

5.1 Onward flights (continued)

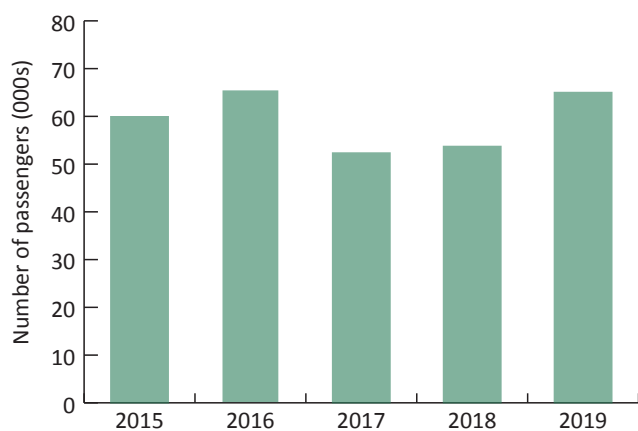
The most popular destinations for onward travel are shown in **Figure 5.1.1**. The highest number of passengers were flying on to the USA, followed by Scotland and Germany. The most popular destinations for departing visitors were Germany, other English airports and Scotland.

Figure 5.1.1 Most popular destinations for onward travel



6.1 Cruise passengers Q2

Figure 6.1.1 Q2 Cruise passenger numbers



Guernsey Harbours collates information on the number of cruise ships and passengers visiting the island, depicted in [Table 6.1.1](#) and [Figure 6.1.1](#).

In quarter 2 2019, there were 64,364 landed passengers, compared with 53,066 during the same quarter in 2018.

Table 6.1.1 Cruise passenger numbers

	2018	2019
Q1	-	-
Q2	53,066	64,364
Q3	64,681	
Q4	-	

6.2 Visiting yachtsmen Q2

Guernsey Harbours collates information on the number of passengers on pleasure craft visiting the island, depicted in **Table 6.2.1** and **Figure 6.2.1**.

In Q2 2019, the number of yachtsmen was 5,872, compared with 6,506 in Q2 2018.

Figure 6.2.1 Q2 Visiting yachtsmen

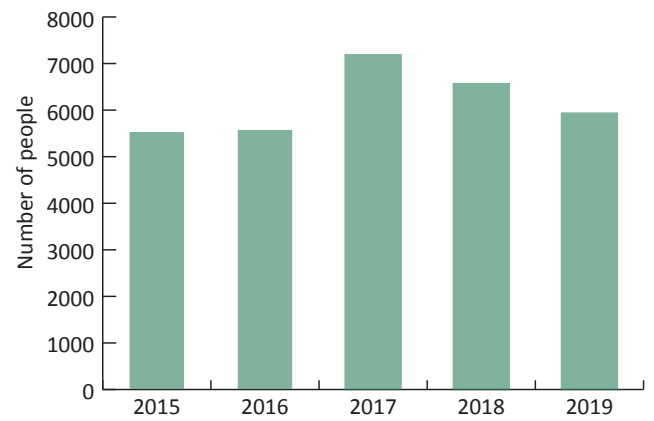


Table 6.2.1 Visiting yachtsmen

	2018	2019
Q1	286	337
Q2	6,506	5,872
Q3	11,363	
Q4	541	

7.1 Methodology

The Guernsey Travel Survey is based upon exit survey interviews undertaken at the airport and harbour, with a random sample of departing passengers. The proportions of resident versus visitor travellers are then applied to the actual numbers of total passengers (provided by the airport and harbour authorities) to determine the passenger composition of Guernsey's main air and sea routes, along with the number of visiting cruise passengers and visiting yachtsmen. The survey is conducted using internationally accepted Market Research and Survey methodology.

In Q2 2019, 6,733 completed interviews were conducted with individuals at the harbour and airport, who responded to the survey on behalf of their immediate travelling party. These interviews represented a total party size of 15,454 passengers, which is 9.7% of the total number of passengers departing Guernsey during Q2 2019 (excluding inter-Bailiwick travel).

All sample surveys are subject to a degree of statistical error. This quarter there were 6,733 interviews conducted and it was found that 51.7% of respondents were departing visitors. With a 95% confidence level, the margin of error is plus/minus 1.2% - in other words, there is a 95% probability that the proportion of departing visitors lies within the range of 50.5% to 52.9%. As the sample sizes decrease (for individual routes, purposes of visit and types of accommodation for example), so the margin of error increases.

7.2 Contact details

You may also be interested in other States of Guernsey Data and Analysis publications, which are all available online at www.gov.gg/data. Please contact us for further information.

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