



Island Global Research





Agenda today

KEY FINDINGS

PART ONE

- 2016 Cruise Liner Passenger Exit Survey

PART TWO

- 2016 Business Impact Survey

CONCLUSIONS

QUESTIONS & ANSWERS



2016 Key Findings

- 8.4% increase in cruise passengers coming ashore as compared to 2015 from 122,700 in 2015 to 133,000 in 2016
- Older passenger age profile as compared to last year but party size the same.
- Drop in length of time passengers stayed ashore as compared to 2015 (may be as a result of more inclusive on-board services (e.g. lunch), more elderly passenger profile, etc.)
- 6.9% increase in overall spend from £3.91m in 2015 to £4.18m in 2016.
- Primary increases in overall spending recorded in retail sector and pre-planned tours
- Excellent feedback from cruise visitors on experience in all aspects of Island including ‘feeling safe’
- 77% of local business respondents stated cruise market as ‘very important or ‘important’

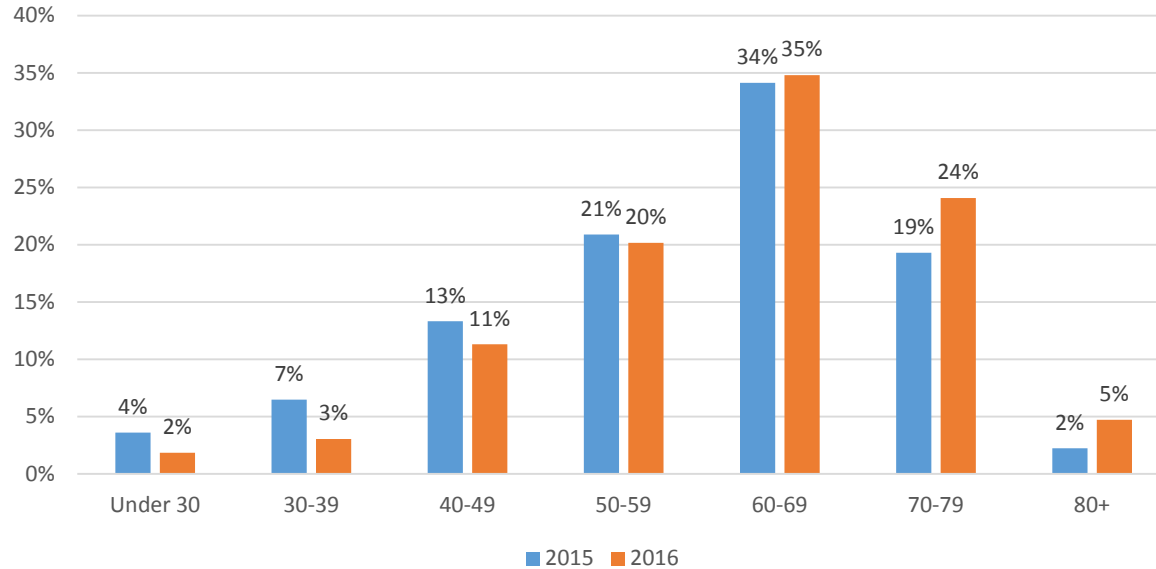


FINDINGS - SECTION ONE

Cruise Liner Passenger Exit Survey

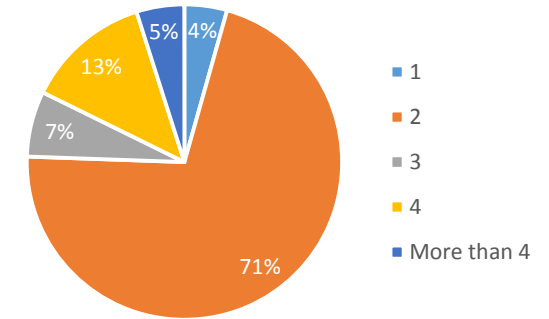
Respondent Profile

Age Profile of Respondent

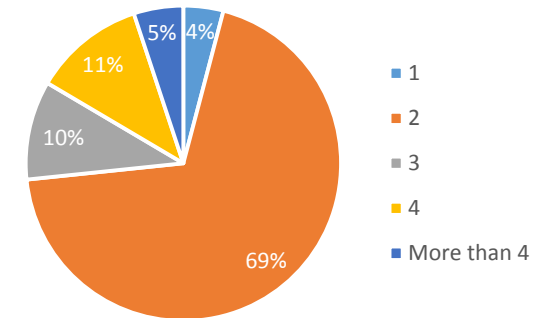


- Two out of three passengers were aged 60+. There was an 8% increase in the number of 70s+ coming ashore over 2015 but a 6% decrease in under 40s.
- The vast majority of passengers comprised parties of two people.

Number in immediate party in 2015

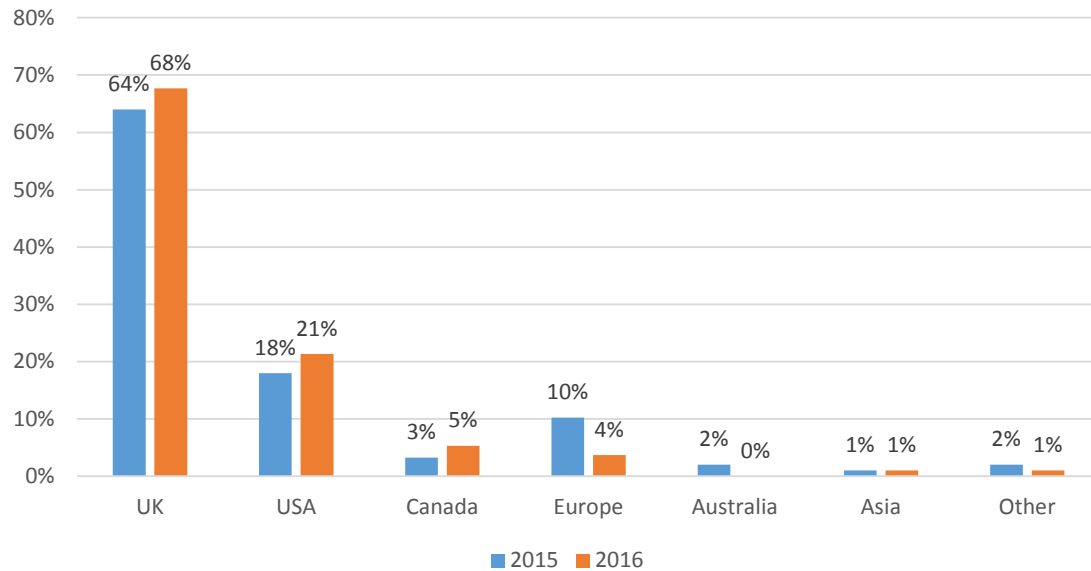


Number in immediate party in 2016

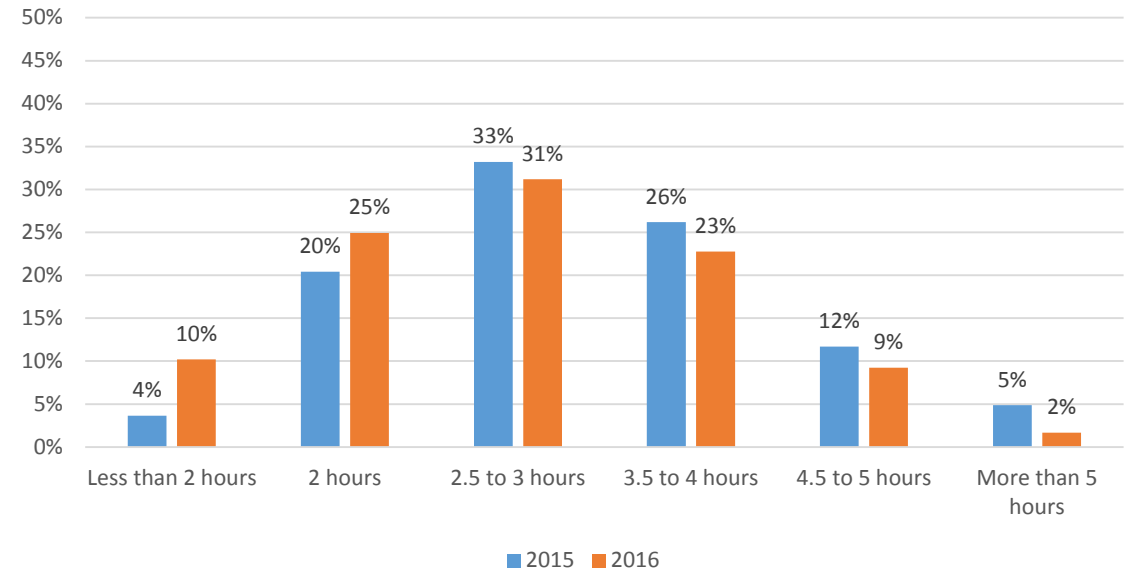


Respondent Profile

Country of Origin of Respondent



Hours spent ashore in Guernsey

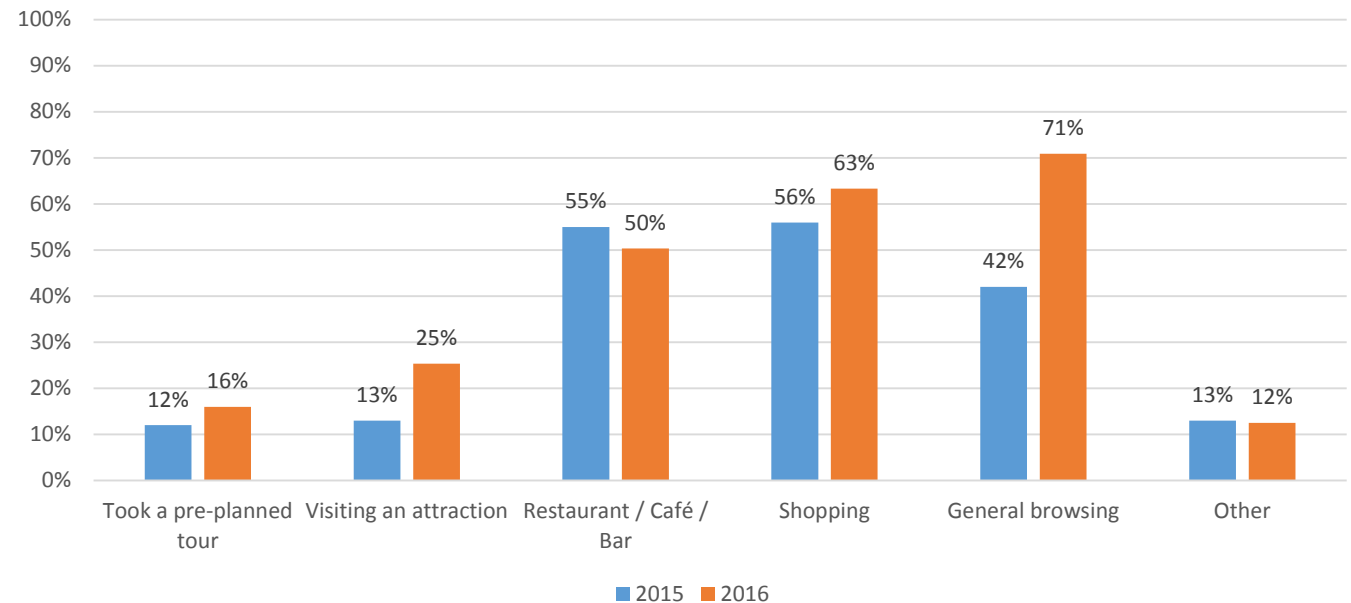


- Two out of three passengers were from the UK, one in five from North America and one in twenty from Europe.
- On average, passengers stayed ashore half a day.

Activities undertaken whilst in Guernsey

- Increases in the percentage of passengers who indicated that they had spent all or some of the time just generally browsing, shopping, taking pre-planned tour, and visiting attractions.
- Popular activities included **Candie Gardens, Castle Cornet, Town Church,** museums, walking tours and using the local bus service.

Activities whilst in Guernsey

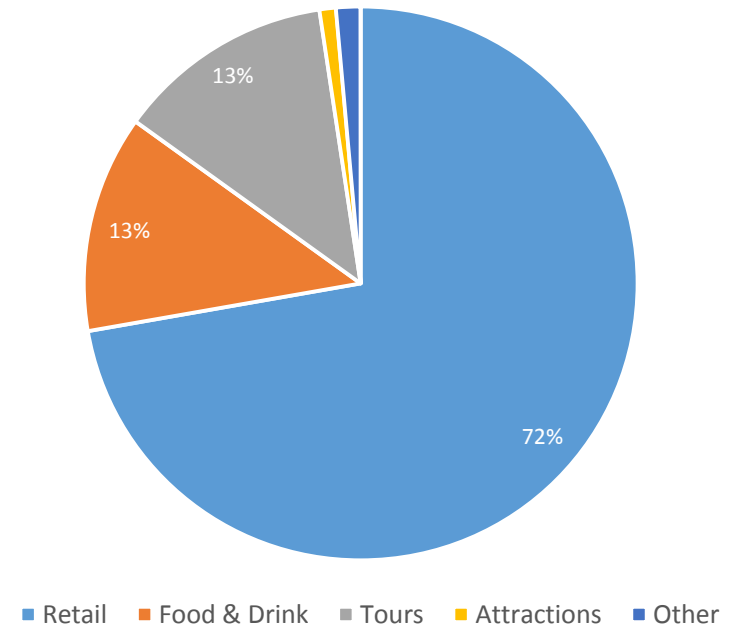




Overall passenger spend

- 92% indicated they purchased whilst ashore.
- The percentage of those spending in the shops increased from 56% to 71% as well as the average spend per person.
- There was an increase both in the numbers of passengers pre-booking tours and the average amount spent in advance.
- The percentage of those spending on food and drink fell from 86% to 70%.

2016 overall spend breakdown



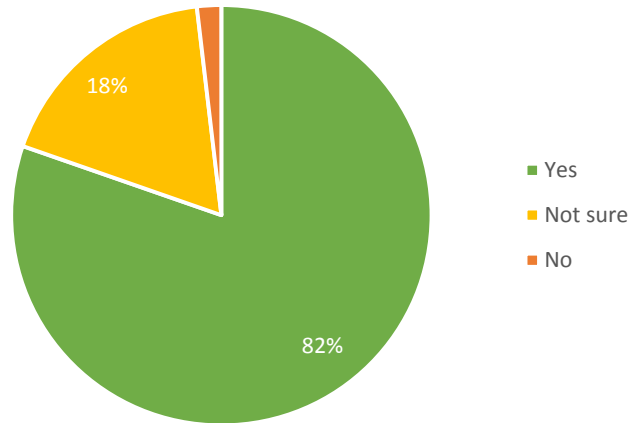
Total spending in Guernsey

CATEGORY	2016		2015	
	Overall value (£m)	% of passengers actually spending	Overall value (£m)	% of passengers actually spending
Retail (incl. food & drink)	3.55	71% Retail 70% food and drink	3.39	56% Retail 86% food and drink
Tours (all)	0.53	18%	0.23	12%
Attractions (spend only whilst ashore)	0.04	4%	0.16	13%
Other	0.06	10%	0.13	13%
TOTAL	£4.18m		£3.91m	

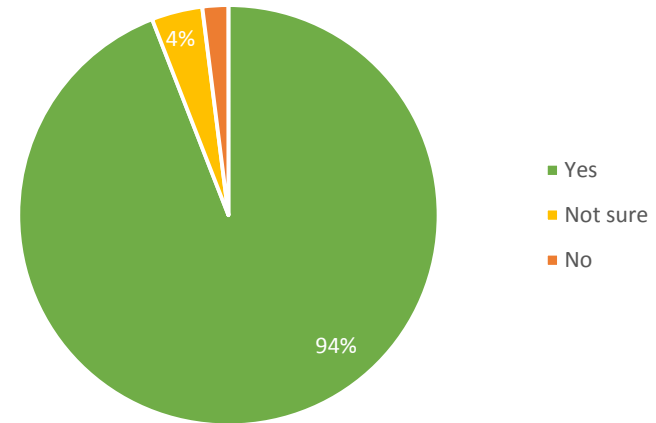
Based on passengers coming ashore (**133,000**), estimated cruise passenger spend at £4.18 million during 2016 with an average spend per passenger of **£31**.

Passenger Opinion

Likelihood of visiting Guernsey again 2015



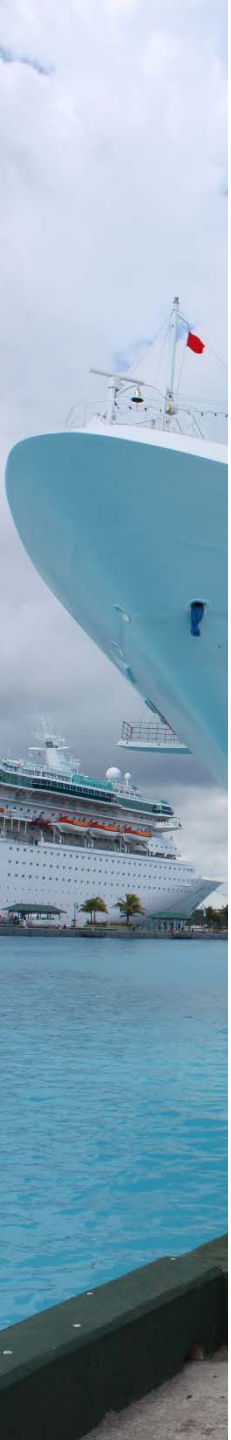
Likelihood of visiting Guernsey again 2016



- Overwhelming majority of passengers indicated that they were likely to visit Guernsey again.
- Overwhelming majority stated they were highly likely to recommend Guernsey to a friend/relative.

Visit Rating

Area of Interest	Rating out of 5 (5 = excellent, 1 = very poor)	
	2015	2016
Guernsey in General	4.9	4.8
Restaurants	4.5	4.5
Shops / Retail	4.6	4.6
Attractions	4.7	4.7
Cleanliness	4.8	4.8
Safety & Security	Not asked	4.8

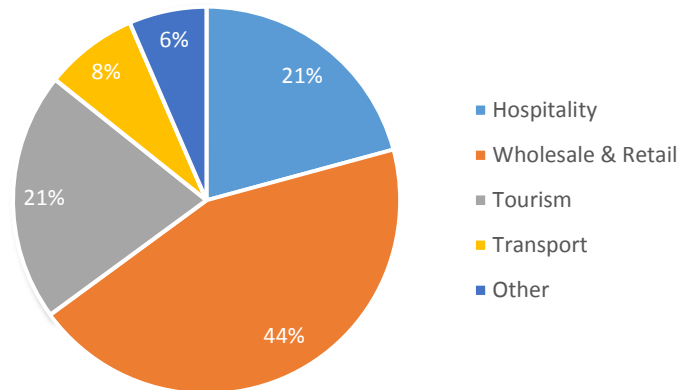


FINDINGS - SECTION TWO

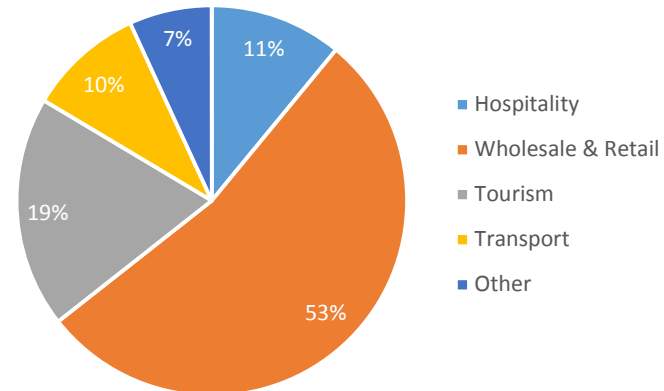
Business Impact Survey

Respondent Profile

Business sector (2015)



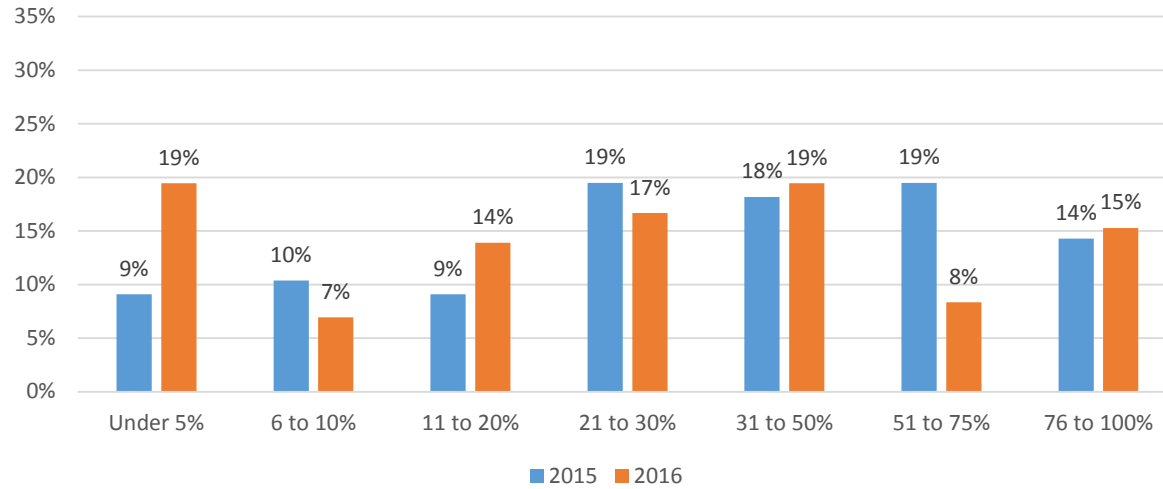
Business sector (2016)



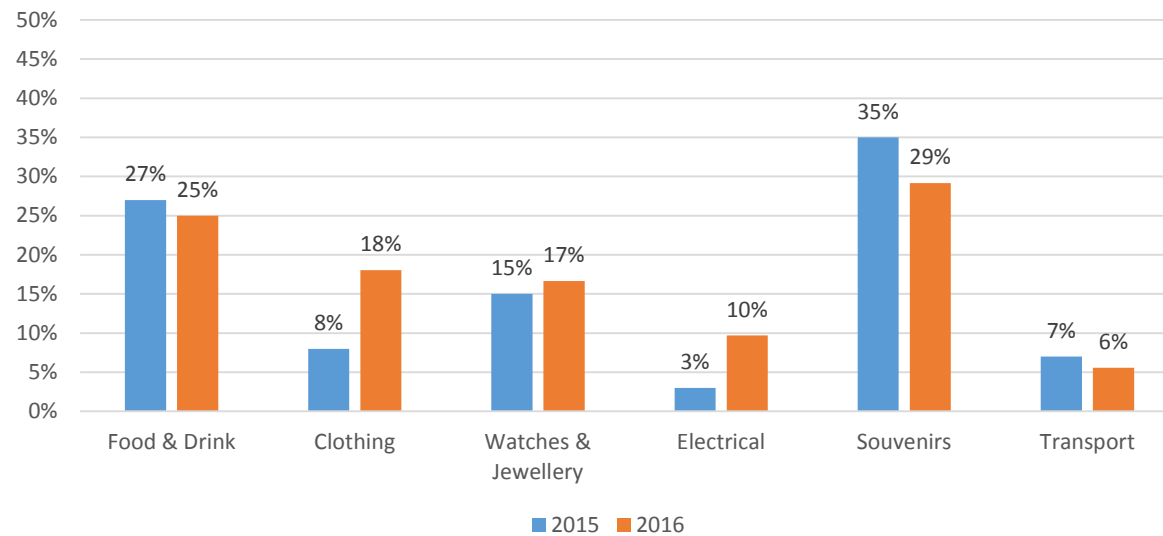
- In 2016, 73 businesses including public and private sector attractions responded to the survey.
- A slightly greater percentage of retailers took part in the 2016 survey as compared with 2015.



% of business turnover attributed to island visitors (including cruise visitors)



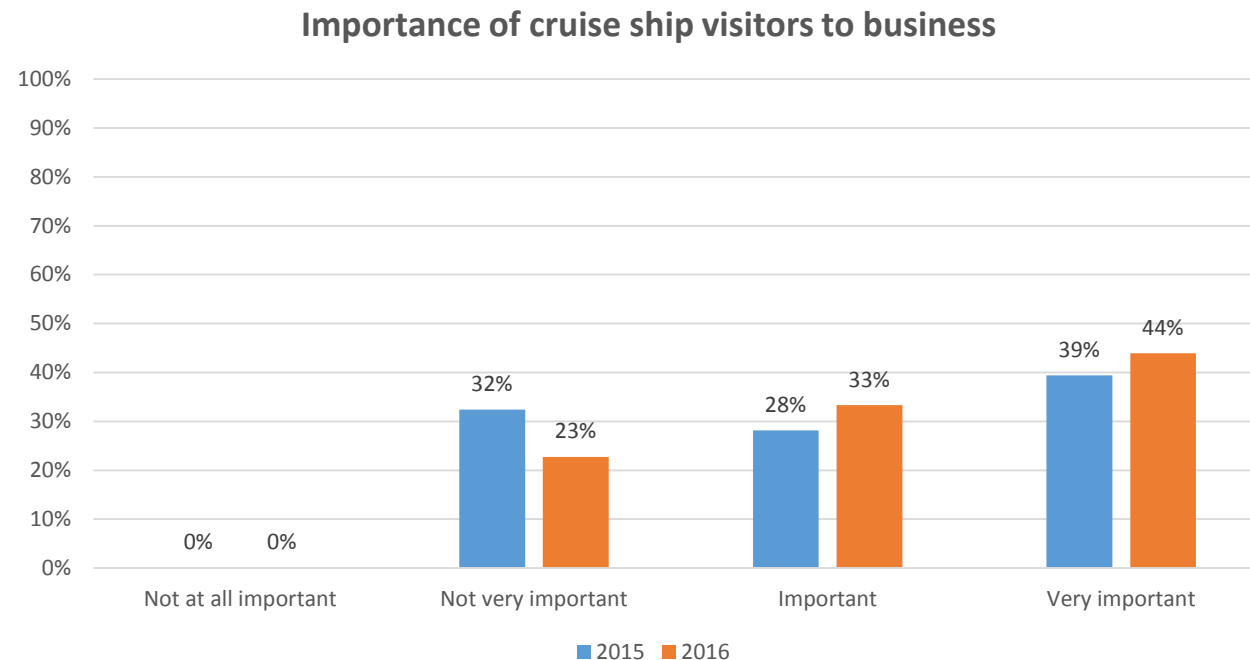
Main products sold to island visitors (including cruise visitors)



- Most businesses received some turnover from island visitors including cruise visitors.
- 72% indicated a turnover of more than 20%, whereas during 2016, 59%.
- Souvenirs and food & drink were the most popular products sold to island visitors.

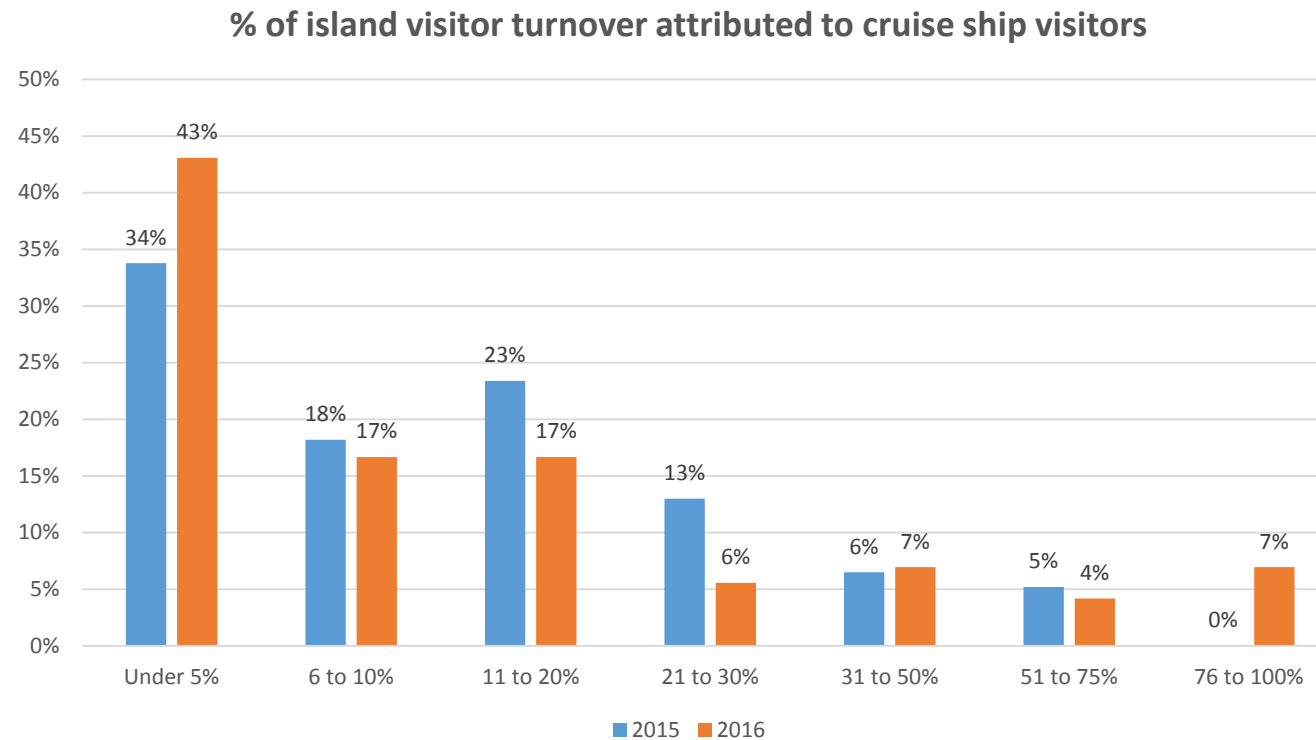


Importance of cruise visitors to local business



- 77% of 2016 of business respondents (67% in 2015) indicated that cruise passenger business was either ‘important’ (33% as compared to 28% in 2015) or ‘very important’ (44% as compared to 39% in 2015) to their particular business.

Importance of cruise visitors to local businesses



- The turnover attributed to visiting cruise passengers was mainly up to 20%.



2016 Main conclusions

- Overall number of passengers increased by 8.4% from 122,700 in 2015 to 133,000 in 2016
- Overall spend increased by 6.9% from £3.91m in 2015 to £4.18m in 2016
- Overall cruise market remains positive with excellent feedback on island experience including 'personal safety'.
- Passenger spend per head about the same as in 2015 despite shorter on-island stay.
- Shorter stay did change activities undertaken whilst ashore and spending patterns.
- Weather always a factor and inevitably some lost revenue due to cancellations.
- Local businesses even more positive about value of cruise market.

Thank you & Questions