

Guernsey Travel Survey

Quarter 1 2019

Issue date April 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 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.

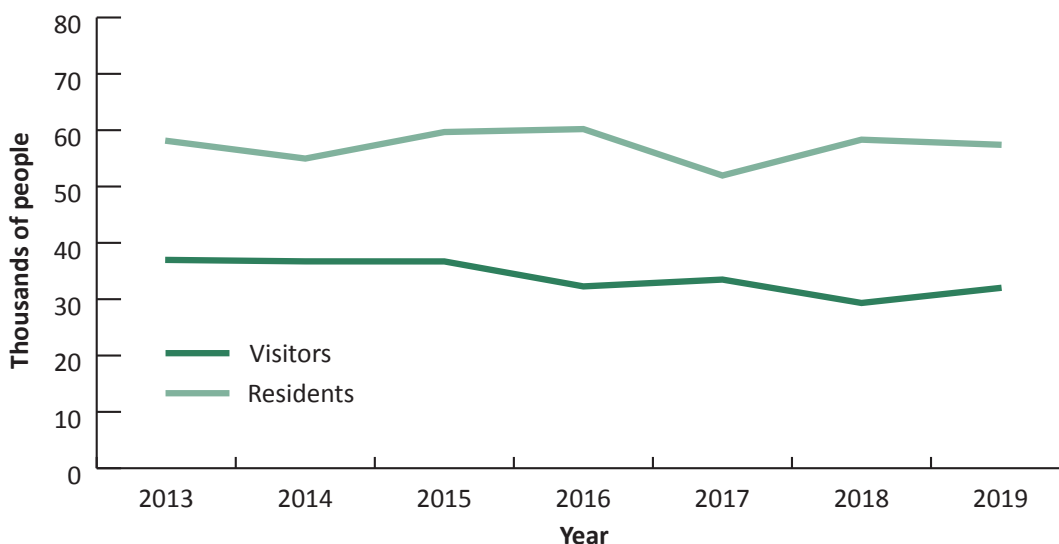
It should be noted that the figures in this report do not include inter-Bailiwick travel (Alderney, Sark and Herm).

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 Q1 2019

- The total number of departing passengers (both visitors and residents), not including cruise or yacht passengers, for Q1 2019 was 89,416, an increase of 2% when compared with Q1 2018.
- The total number of departing visitors, not including cruise and yacht passengers, for Q1 2019 was 32,007. The total number of departing residents was 57,409 in Q1 2019.
- Of the 32,007 departing visitors in Q1 2019, 84% travelled by air and 16% by sea.
- 23% of visitors stayed for business purposes, 30% were visiting friends or relatives, 24% were leisure visitors staying for at least one night and a further 19% visiting for a day trip.
- The average length of stay for those who stayed at least one night in Q1 2019 was 4.30 nights.
- 71% of visitors during Q1 2019 were from the UK, 3% from France, 16% from Jersey and the remainder from elsewhere.

Figure 1.2.1 Q1 departing passenger numbers



1.3 Summary for Q1 2019

Table 1.3.1 Summary of Q1 2019 results compared with Q1 2018

	Q1 2018	Q1 2019	% change
Total departing visitors (incl. cruise & yacht)	29,616	32,344	+9
Total departing visitors (excl. cruise & yacht)	29,330	32,007	+9
Total departing residents	58,315	57,409	-2
Total departing passengers (incl. cruise & yacht)	87,931	89,753	+2
Total departing passengers (excl. cruise & yacht)	87,645	89,416	+2
Total returning visitors	435	463	+6
Total passengers (incl. cruise & yacht)	88,366	90,216	+2
Total passengers (excl. cruise & yacht)	88,080	89,879	+2
Departing visitors by air	25,000	26,826	+7
Departing visitors by sea	4,330	5,180	+20
Visitors staying for leisure purposes	6,224	7,599	+22
Visitors staying with friends / relatives	8,553	9,546	+12
Visitors staying for business purposes	7,824	7,492	-4
Visitors staying for other/unknown purposes	721	885	+23
Total staying visitors (excluding long stay)	23,323	25,522	+9
Long stay visitors	662	452	-32
Average length of stay (excluding long stay)	4.44 nights	4.30 nights	-3
Total number of bed nights	103,442	110,805	+7
Total staying in commercial accommodation	15,052	16,670	+11
Average stay in commercial accommodation	3.14 nights	3.23 nights	+3
Bed nights in commercial accommodation	47,232	53,802	+14
Day visitors for leisure purposes	1,116	1,773	+59
Day visitors with friends / relatives	230	283	+23
Day visitors for business purposes	3,184	3,490	+10
Day visitors for other/unknown purposes	816	487	-40
Total day visitors	5,346	6,033	+13
Visitors from the UK	20,567	22,835	+11
Visitors from France	1,050	795	-24
Visitors from Jersey	4,183	5,243	+25
Visitors from elsewhere	3,476	3,105	-11
Cruise ship passengers	0	0	-
Visiting yachtsmen	286	337	+18
Departing Guernsey residents by air	50,457	50,463	<0
Departing Guernsey residents by sea	7,858	6,947	-12
Net Promoter Score	41.2	52.0	+26

2.1 Total departing passengers Q1

Table 2.1.1 Q1 total departing passengers by mode of transport

Year	Number by air	Number by sea
2016	83,942	8,522
2017	73,691	11,747
2018	75,456	12,189
2019	77,289	12,127

As shown in **Table 2.1.1**, in Q1 2019 there were 77,289 departing passengers by air and 12,127 by sea (these figures include returning visitors). This represents a 2% increase in air passenger numbers and no real change in sea passengers since Q1 2018.

Table 2.1.2 Q1 total departing passengers by air and by type

	Number of Visitors	Number of Residents
2016	28,971	54,971
2017	28,805	44,886
2018	25,000	50,457
2019	26,826	50,463

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 2.1.3 Q1 total departing passengers by sea and by type

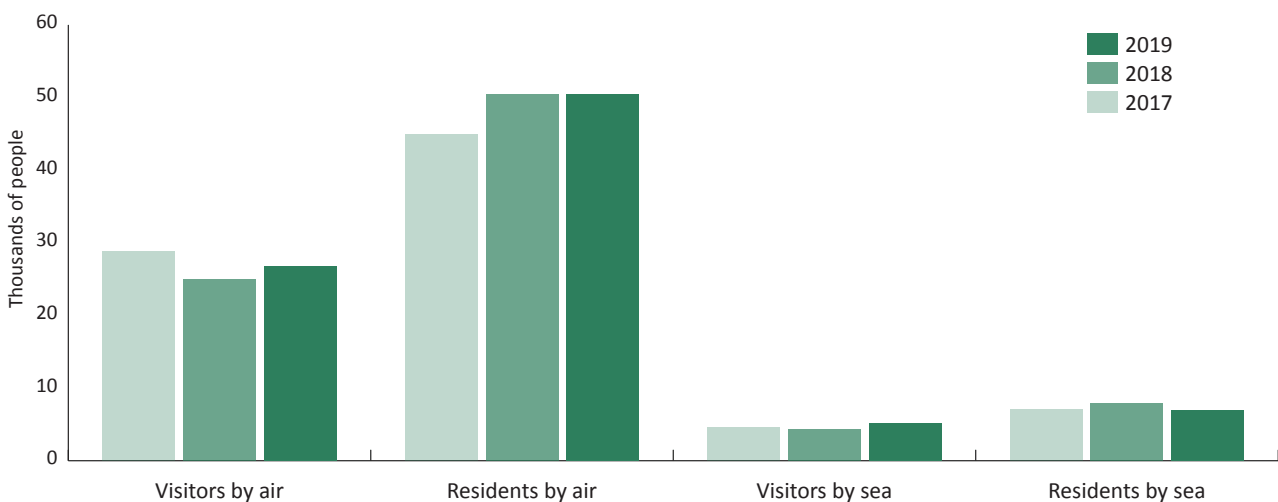
	Number of Visitors	Number of Residents
2016	3,299	5,223
2017	4,679	7,068
2018	4,330	7,858
2019	5,180	6,947

Table 2.1.4 shows the percentages of departing visitors, returning visitors and residents during Q1.

Table 2.1.4 Q1 total departing passengers by type of passenger

	Number of passengers	% departing visitors	% returning visitors	% residents
2016	92,664	34.8	0.2	65.0
2017	85,805	39.0	0.4	60.5
2018	88,080	33.3	0.5	66.2
2019	89,879	35.6	0.5	63.9

Figure 2.1.1 Q1 total departing passengers by type and by mode of transport



2.2 Departing visitors Q1 - by mode of transport

Table 2.2.1 Q1 departing visitors by air

Year	By air	
	Number	% change
2014	32,168	<-1
2015	30,719	-5
2016	28,971	-6
2017	28,805	<-1
2018	25,000	-13
2019	26,826	+7

As shown in **Table 2.2.1** and **Table 2.2.2**, in Q1 2019 there were 26,826 departing visitors by air and 5,180 by sea.

This compares with 25,000 by air and 4,330 by sea in Q1 of 2018.

Figure 2.2.2 shows the longer term trend in departing visitors by mode of transport and clearly demonstrates the seasonal nature of the industry.

Table 2.2.2 Q1 departing visitors by sea

Year	By sea	
	Number	% change
2014	4,545	-3
2015	5,986	+32
2016	3,299	-45
2017	4,679	+42
2018	4,330	-8
2019	5,180	+20

Figure 2.2.2 Departing visitors by mode of transport



2.3 Departing visitors Q1 - by purpose of visit

Table 2.3.1 shows the number of departing visitors during Q1 2019 broken down by purpose of visit. In Q1 2019 the highest proportion of visitors were staying with friends or relatives (VFR) (30%), followed by visitors staying for leisure purposes (24%).

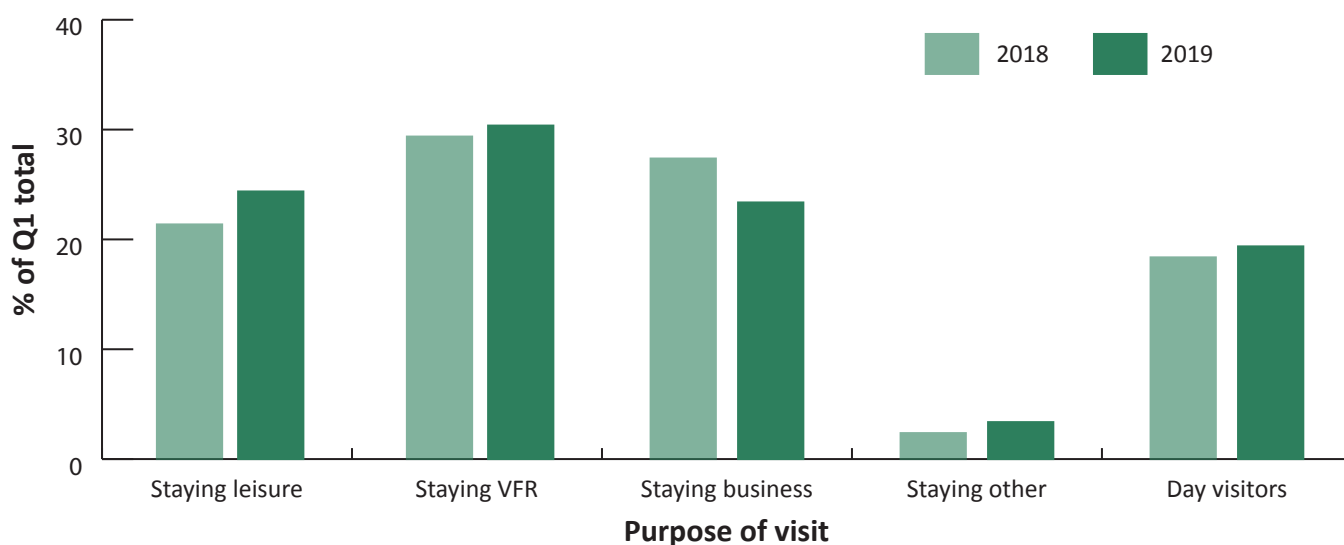
In Q1 2018 the respective percentages were 29%, 21 and 27%.

The total number of day visitors during Q1 was 6,033 in 2019, 19% of total visitors. The equivalent figure in Q1 2018 was 5,346, which was 18% of the total visitors for that period.

Table 2.3.1 Q1 departing visitors by purpose of visit

Purpose	2018		2019	
	Number	%	Number	%
Staying leisure	6,224	21	7,599	24
Visiting friends / relatives	8,553	29	9,546	30
Staying business	7,824	27	7,492	23
Staying other / unknown	721	2	885	3
Day visit leisure	1,116	4	1,773	6
Day visit friends / relatives	230	1	283	1
Day visit business	3,184	11	3,490	11
Day visit other / unknown	816	3	487	2
Long stay visitors	662	2	452	1
TOTAL	29,330	100	32,007	100

Figure 2.3.1 Q1 departing visitors by purpose of visit



2.3 Departing visitors Q1 - by purpose of visit (continued)

Table 2.3.2 shows the number of departing visitors during Q1 2019 broken down by mode of transport and purpose of visit. In Q1 2019 the highest proportion of visitors by air were visitors staying at least one night with friends or family, whereas for visitors travelling by sea, the highest was staying leisure visitors.

Table 2.3.2 Q1 departing visitors by mode of transport and purpose of visit

Purpose	By air	By sea
Staying leisure	5,894	1,705
Visiting friends / relatives	8,454	1,092
Staying business	6,450	1,041
Staying other/unknown	763	123
Day visit leisure	1,064	709
Day visit friends / relatives	228	55
Day visit business	3,363	126
Day other/unknown	339	148
Long stay visitors	270	181
TOTAL	26,826	5,180

Figure 2.3.2 Q1 2019 departing visitors by air - purpose of visit

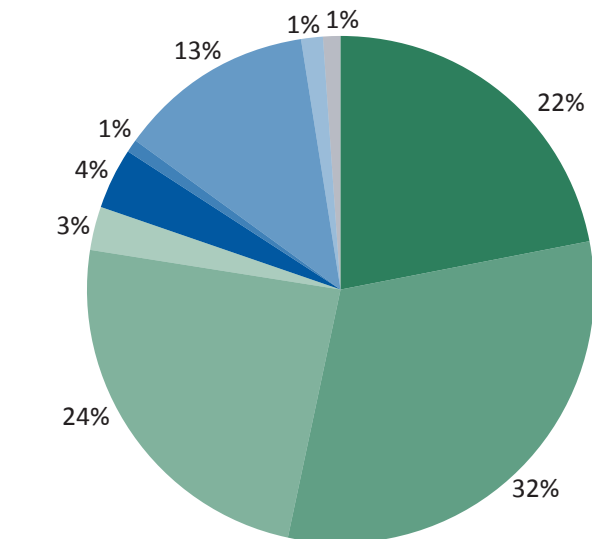
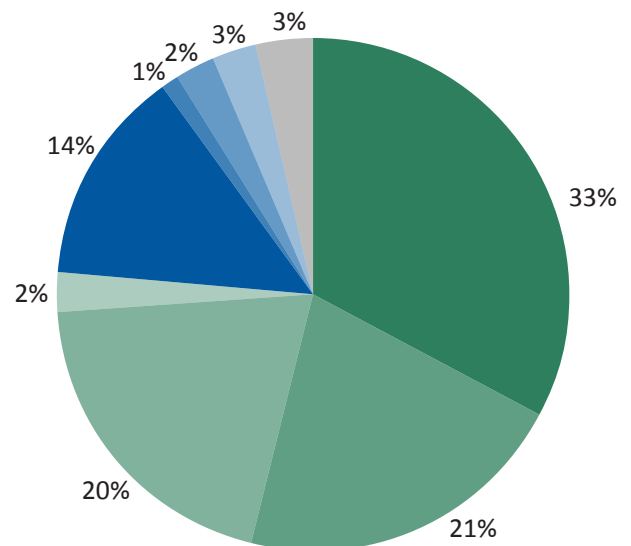
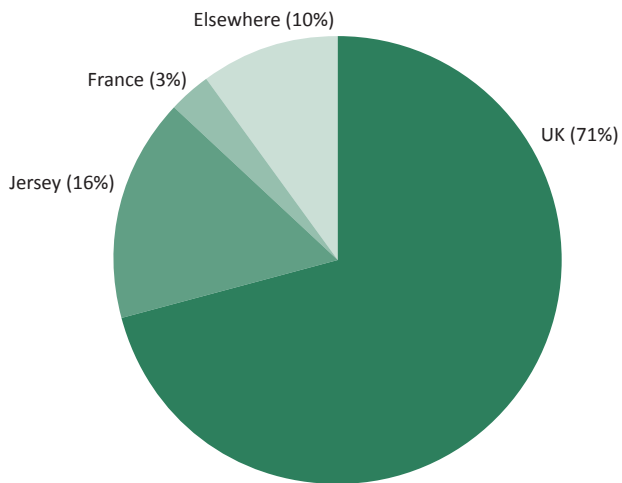


Figure 2.3.3 Q1 2019 departing visitors by sea - purpose of visit



2.4 Departing visitors Q1 - by country of residence

Figure 2.4.1 Q1 2019 departing visitors by country of residence



The majority of visitors during Q1 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, Ireland and the USA.

Table 2.4.1 Q1 departing visitors by country of residence

	UK	Jersey	France	Elsewhere
2014	26,398	6,780	778	2,754
2015	28,543	4,551	981	2,627
2016	24,815	4,322	846	2,286
2017	25,198	4,989	643	2,654
2018	20,567	4,183	1,050	3,476
2019	22,835	5,243	795	3,105

2.5 Departing visitors Q1 - by accommodation and length of stay

Table 2.5.1 Q1 2019 departing visitors by type of accommodation

	2019	% of total
Hotel	14,794	58
Guest accom.	553	2
Self catering	772	3
Camping	0	0
Friends/relatives	9,123	35
Other	552	2

More people stayed in hotel accommodation than in any other type of accommodation in Q1 2019 (58%) (Table 2.5.1).

The overall average length of stay was 4.30 nights in Q1 2019.

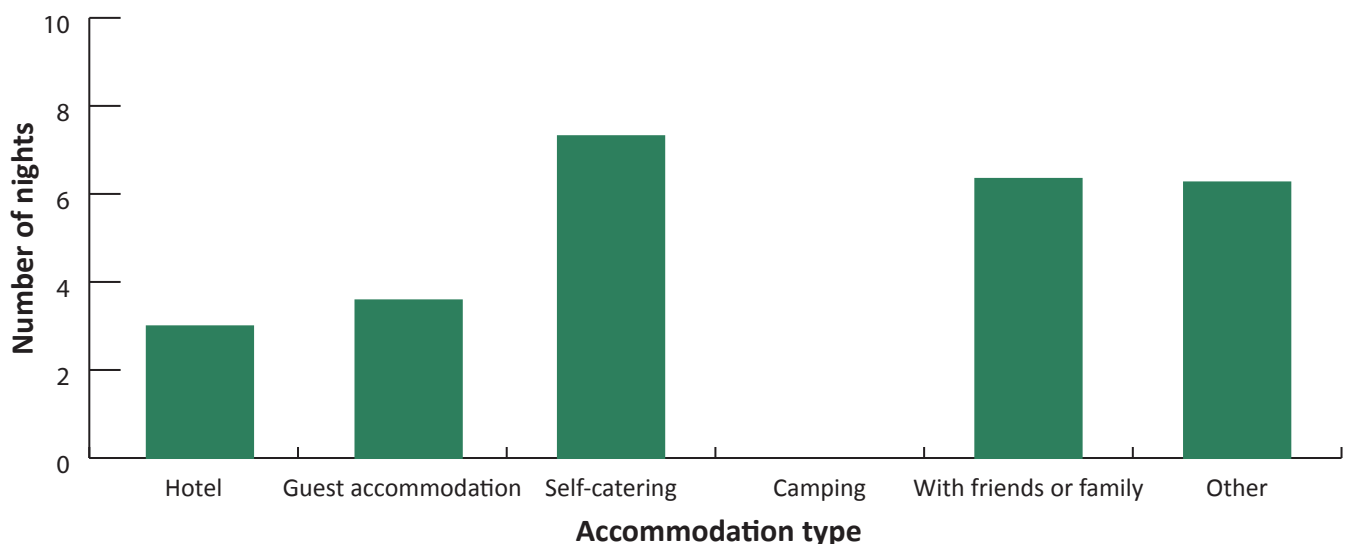
In total there were 110,805 overnight stays in Q1 2019, of which 53,802 were in commercial accommodation.

Table 2.5.2 Q1 2019 average length of stay (number of nights)

	Average length of stay
2014	4.07
2015	4.09
2016	4.03
2017	4.09
2018	4.44
2019	4.30

In Q1 2018 these figures were 103,442 and 47,232, giving increases of 7% and 14% respectively.

Figure 2.5.1 Average length of stay by accommodation type Q1 2019



2.6 Departing visitors Q1 - day visitors

Table 2.6.1 Q1 day visitors as percentage of total departing visitors

	Departing day visitors	Total departing visitors	Day visitors as % total departing visitors
2014	9,550	36,714	26
2015	7,555	36,705	21
2016	6,095	32,270	19
2017	6,434	33,484	19
2018	5,346	29,330	18
2019	6,033	32,007	19

Table 2.6.2 Q1 day visitors

	2019	
	Number	%
Day visit leisure	1,773	29
Day visit friends / relatives	283	5
Day visit business	3,490	58
Day visit other	487	8
Total day visitors	6,033	

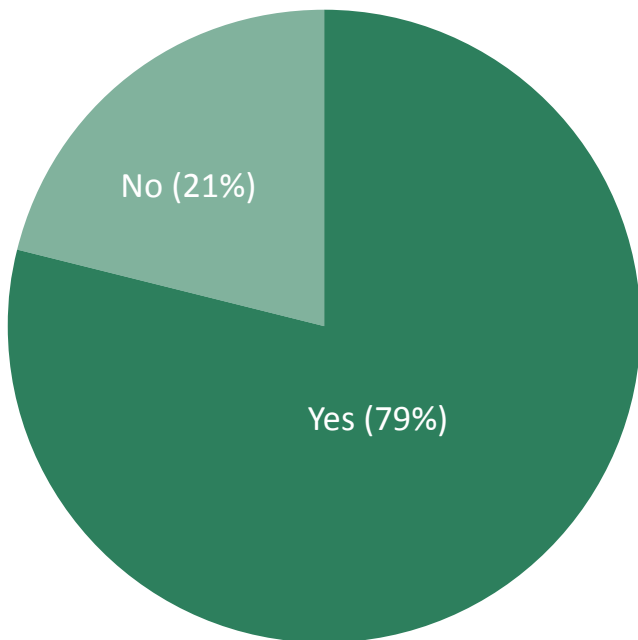
The majority of departing visitors on a day trip were travelling by air (83% in Q1 2019).

As a percentage of overall departing visitors, day visitors comprised 19% of the total (**Table 2.6.1**).

Table 2.6.2 shows that 29% of day visits were for leisure purposes, and 58% for business purposes.

2.7 Previous visits to Guernsey - Q1 2019

Figure 2.7.1 Q1 visitors who had visited Guernsey previously



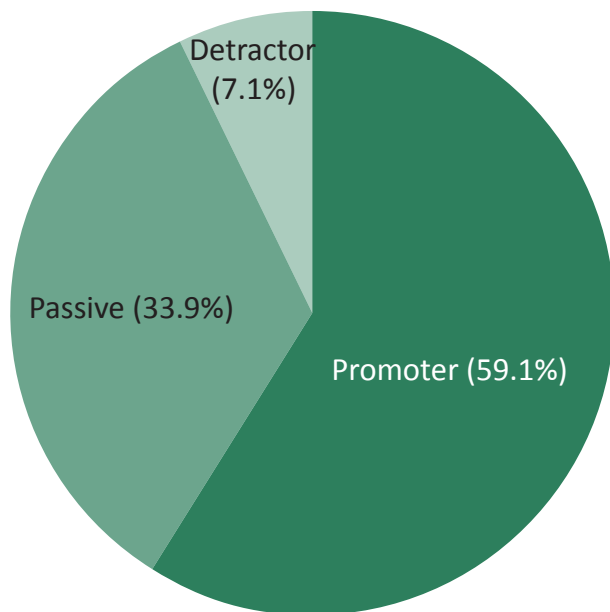
Respondents were asked if they had visited Guernsey before and, if so, had they visited on a cruise ship.

In Q1 2019, 79% of all visitors had been to Guernsey previously.

Of those who had visited previously, 2.3% had visited on a cruise ship.

3.1 Recommendations of Guernsey - Q1 2019

Figure 3.1.1 Q1 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 Q1 2019 the NPS was 52.0. This compares with 41.2 in Q1 2018.

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

Table 3.1.1 Q1 number of promoters, passives and detractors

	2019	
	Number	as %
Promoters	979	59.1
Passives	561	33.9
Detractors	117	7.1
Net Promoter Score		52.0

4.1 Departing residents - Q1

Table 4.1.1 Q1 departing residents

	Total number	as % of total departing passengers
2014	54,963	60.0
2015	59,670	61.9
2016	60,194	65.0
2017	51,954	60.5
2018	58,315	66.2
2019	57,409	63.9

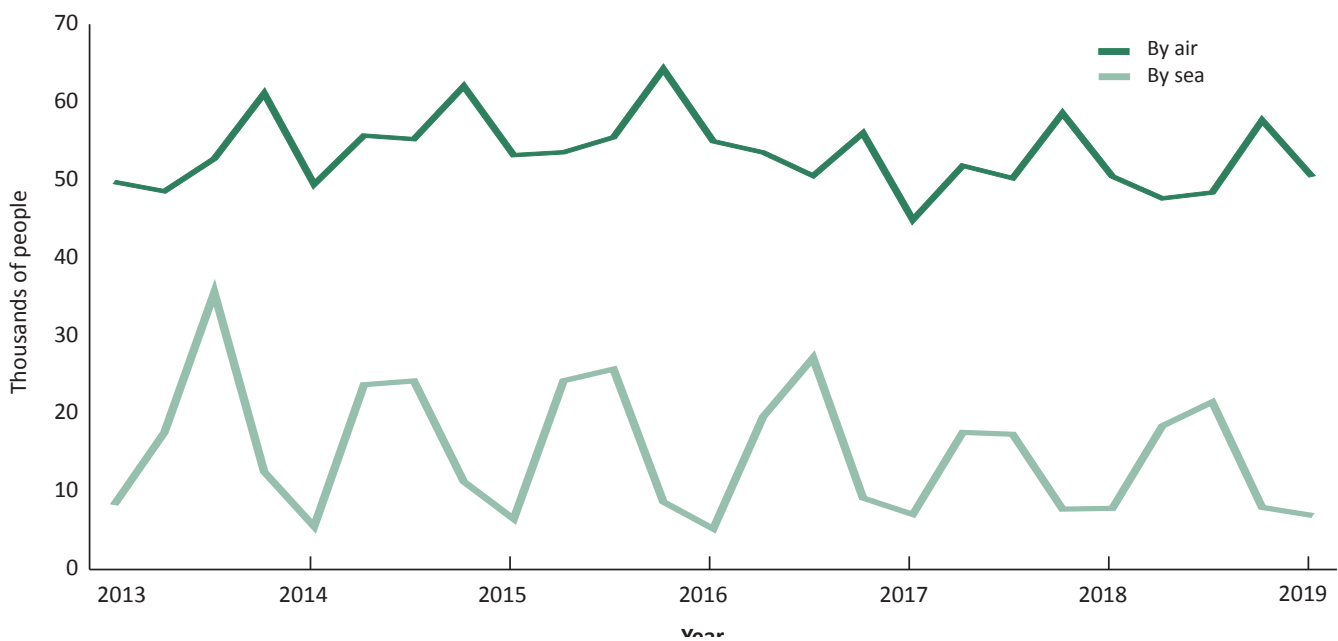
The number of departing residents was 57,409 in Q1 2019.

The majority of departing residents travelled by air (88%) as can be seen in **Table 4.1.2**.

Table 4.1.2 Q1 departing residents by mode of transport

	by air	by sea
2014	49,442	5,522
2015	53,192	6,478
2016	54,971	5,223
2017	44,886	7,068
2018	50,457	7,858
2019	50,463	6,947

Figure 4.1.1 Trend in departing residents by mode of transport



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 Q1 2019, 20% of all passengers were flying on to another airport. 12,467 Guernsey residents (25% of total) and 3,205 departing visitors (12% of total) were flying onwards in the first quarter of 2019.

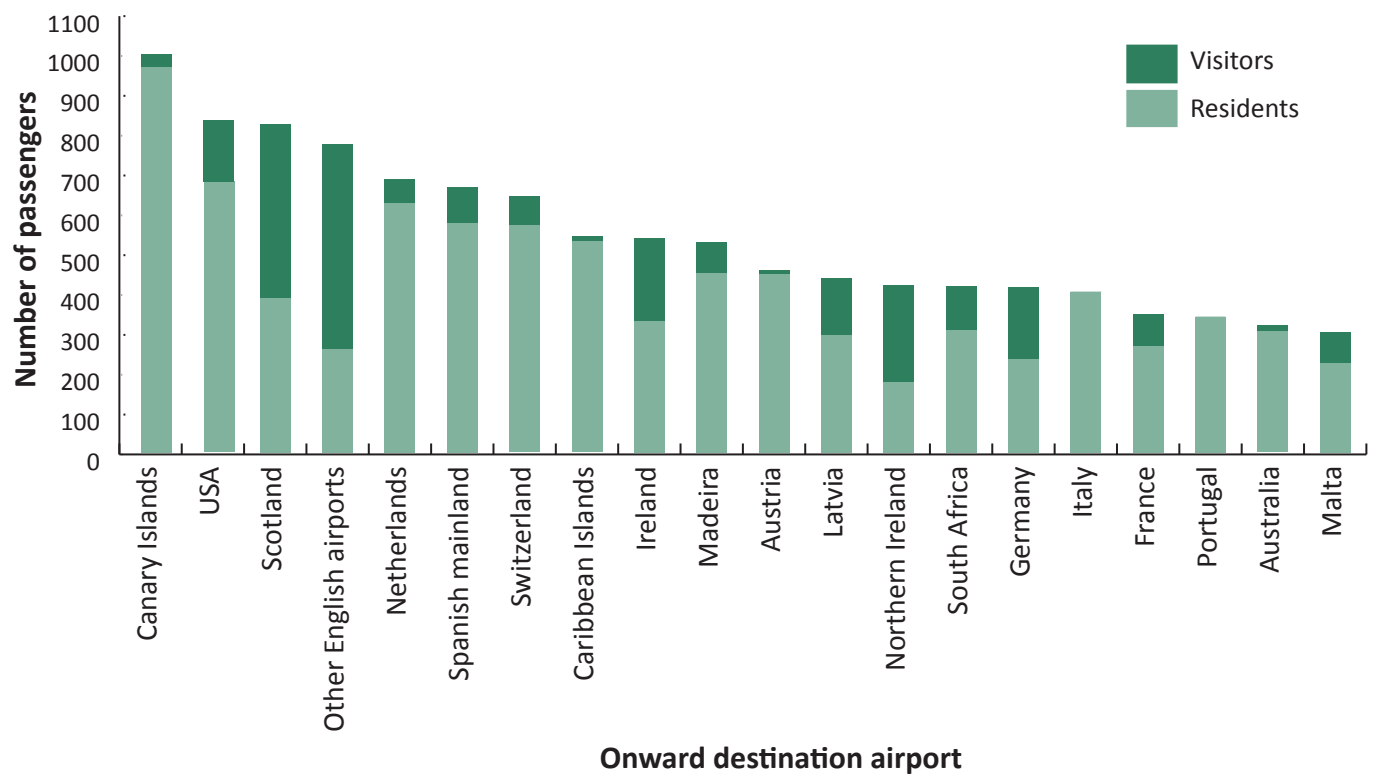
Table 5.1.1 Q1 Onward flights

Initial destination airport	Visitor departures	Visitors travelling onward	Resident departures	Residents travelling onward
Birmingham	1,353	314	2,152	300
Bristol	820	20	950	84
East Midlands	761	10	533	19
Exeter	1,530	112	1,670	10
Gatwick	9,788	1,528	25,193	10,171
Manchester	2,414	148	3,811	320
Southampton	4,240	481	6,688	766
Stansted	875	101	1,039	260
Other UK airports	128	-	96	19
Jersey	4,914	491	7,785	518
Foreign airports	3	-	545	-
Total	26,826	3,205	50,463	12,467

5.1 Onward flights (continued)

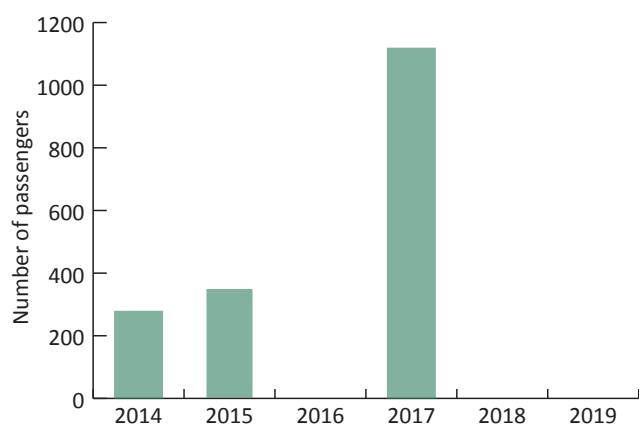
The most popular destinations for onward travel are shown in **Figure 5.1.1**. The highest number of passengers were flying on to the Canary Islands, followed by the USA, Scotland and other English airports. The most popular destinations for departing visitors were other English airports, Scotland and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

Figure 5.1.1 Most popular destinations for onward travel



6.1 Cruise passengers Q1

Figure 6.1.1 Q1 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 1 2019, there were no landed passengers.

Table 6.1.1 Cruise passenger numbers

	Q1
2015	342
2016	0
2017	1,108
2018	0
2019	0

6.2 Visiting yachtsmen Q1

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 Q1 2019, the number of yachtsmen was 337, compared with 286 in Q1 2018.

Figure 6.2.1 Q1 Visiting yachtsmen

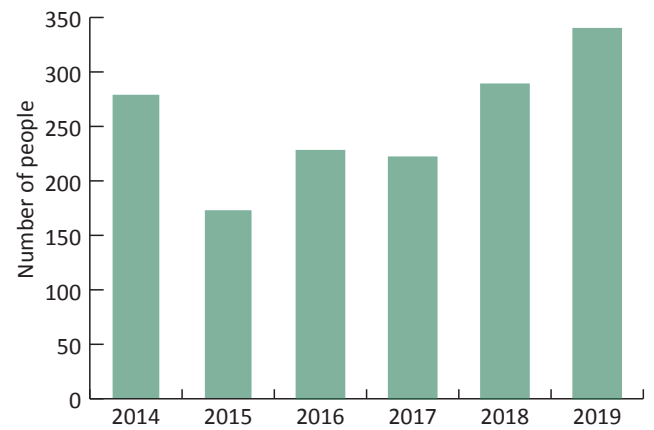


Table 6.2.1 Visiting yachtsmen

	Q1
2015	171
2016	225
2017	219
2018	286
2019	337

7.1 Methodology

Surveys are undertaken at Guernsey's airport and harbour to determine the composition of passengers. The results are analysed and the resulting percentages are applied to the actual numbers of passengers (provided by the airport and harbour authorities). For the smaller routes, cumulative passenger numbers are used, giving more statistically accurate results.

The face-to-face interviews are conducted in shifts, covering all routes, days of the week and times of day. The interviewee selection process is as random as possible and targets one person per travelling party. The interviews are conducted on a range of days of the week and a range of times of the day, minimising bias.

In April 2017 the interview questionnaire was updated following a move from paper-based, face-to-face interviews to a digital questionnaire. In addition, the move from quarterly to monthly data collection meant that shift patterns were also updated to reflect this.

In Q1 2019 a total of 4,700 interviews were completed, which represented 8,193 passengers. This is 9.1% of the total number of passengers departing Guernsey during Q1 2019 (excluding inter-Bailiwick travel).

All sample surveys are subject to a degree of statistical error. This quarter there were 4,700 interviews conducted and it was found that 35.6% of respondents were departing visitors. With a 95% confidence level, the margin of error is plus/minus 1.4% - in other words, there is a 95% probability that the proportion of departing visitors lies within the range of 34.2% to 37.0%. 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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