

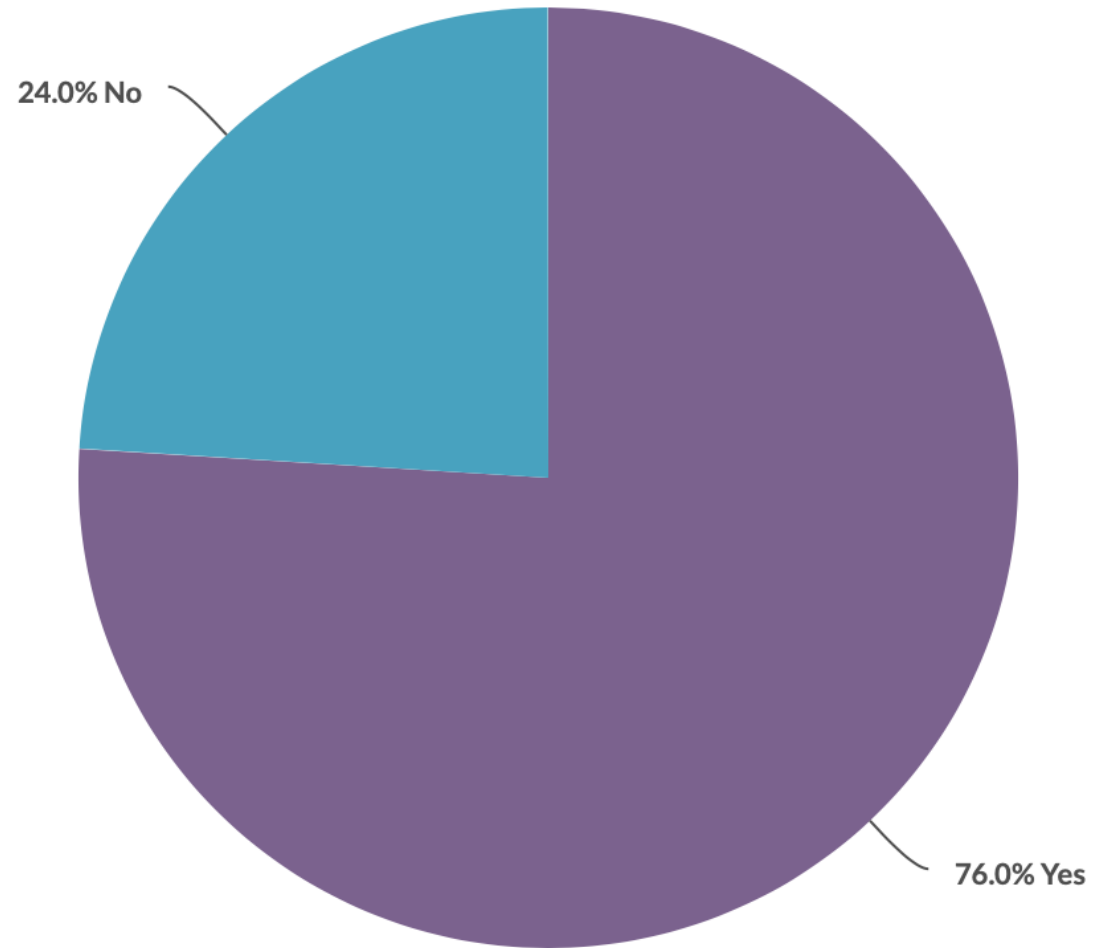
# VisitGuernsey Consumer Survey 2020

- Covid-19 Travel Plans

# C-19 Travel Plans Survey

- The survey took place between 7<sup>th</sup> – 15<sup>th</sup> Oct, going out to a database of 54,819 who had previously expressed an interest in the Islands of Guernsey
- 2,908 responded to the survey (5.3% response rate)
- 2,604 of those completed the whole survey (88.9% completion rate)

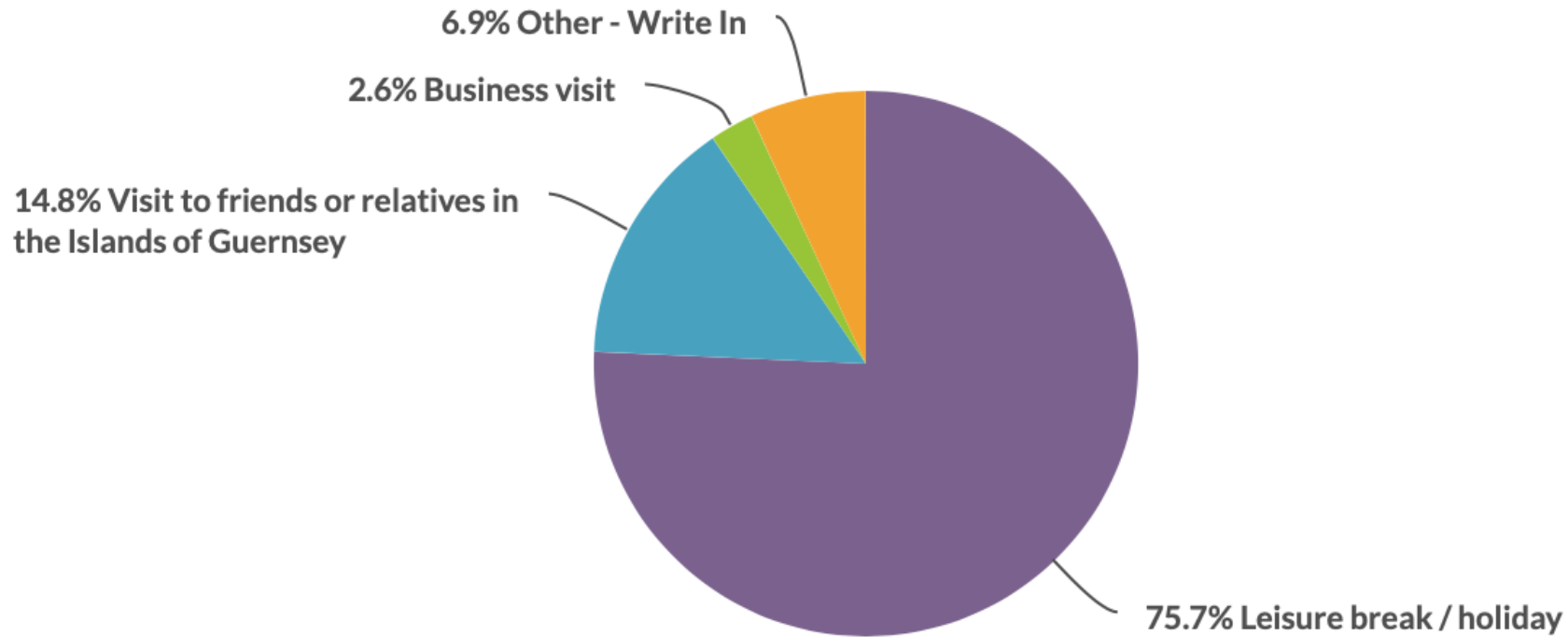
# Have you visited Guernsey before?



# How long ago did you last visit Guernsey?

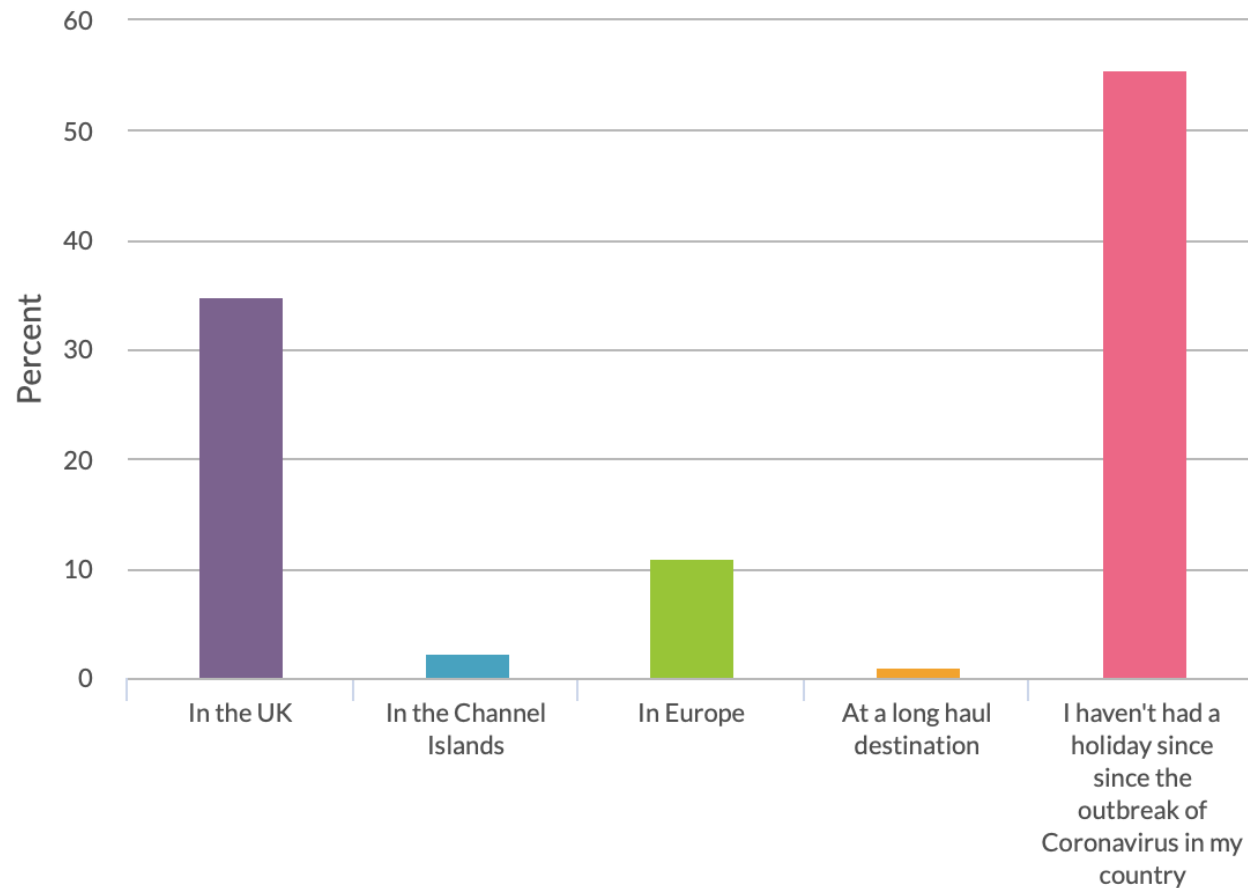
	Leisure visitors	VFR	Business	All
Within the last year	19.9%	48%	32.1%	24.5%
Within the last 3-5 years	48.5%	38.7%	32.1%	46.7%
More than 5 years ago	31.6%	13.2%	35.8%	28.8%

# Purpose of visit



Other: Sailing, cruise visit, previously lived there, celebrations

# Since the outbreak of Covid-19, where have you had a holiday/short break?

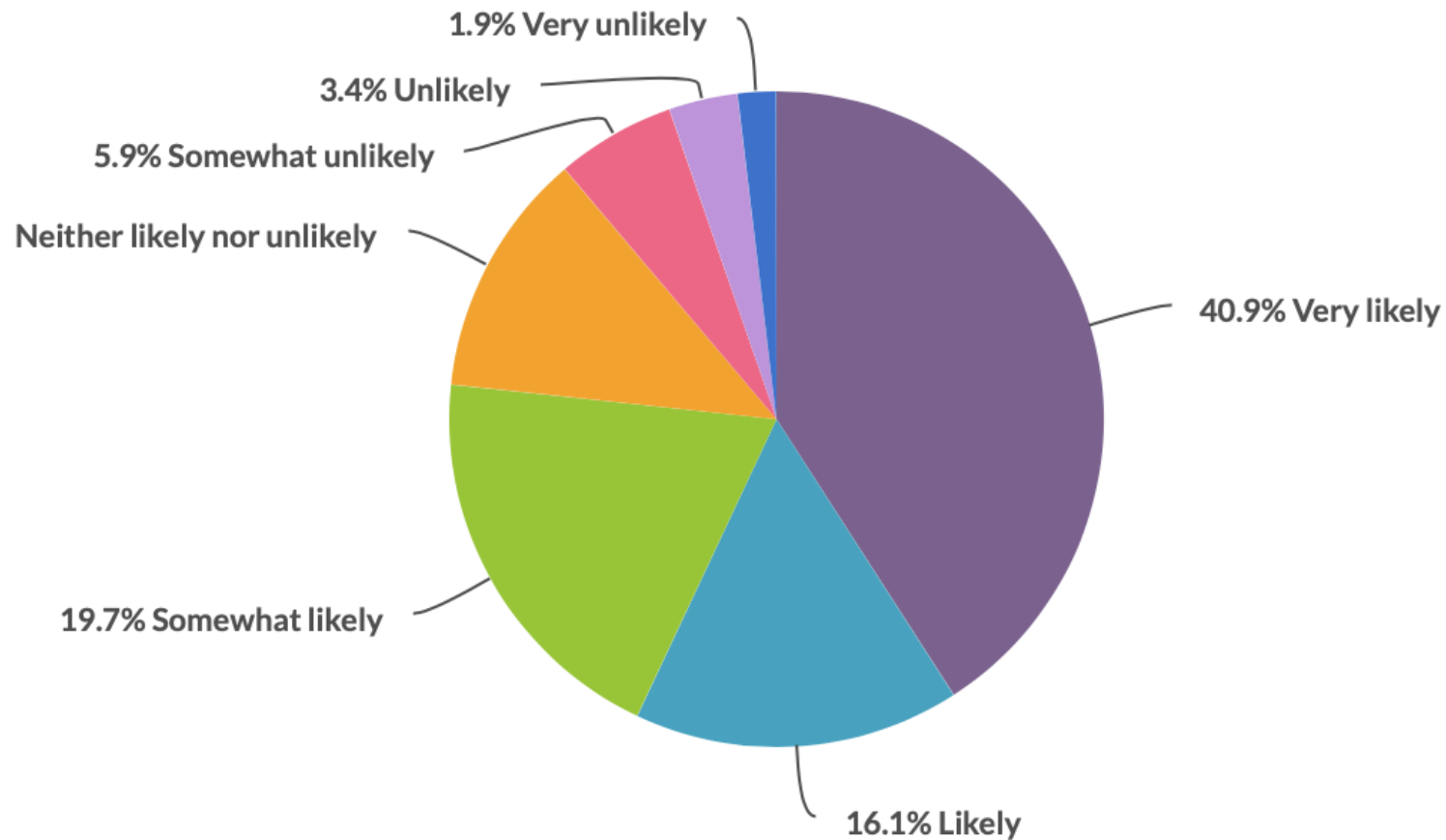


	%
In the UK	34.8%
In the Channel Islands	2.4%
In Europe	11%
At a long haul destination	1.1%
I haven't had a holiday since the outbreak of Coronavirus in my country	55.6%

# Since the outbreak of Covid-19, where have you had a holiday/short break?

	Leisure visitors	VFR	Business	All
In the UK	36.6%	33.6%	30%	34.8%
In the Channel Islands	2.4%	4.2%	6%	2.4%
In Europe	10.8%	7.3%	18%	11%
At a long haul destination	0.4%	1.7%	4%	1.1%
I haven't had a holiday since the outbreak of Coronavirus in my country	53.8%	57.4%	56%	55.6%

If border/travel restrictions allow, how likely are you to visit The Islands of Guernsey in the next 12 months?





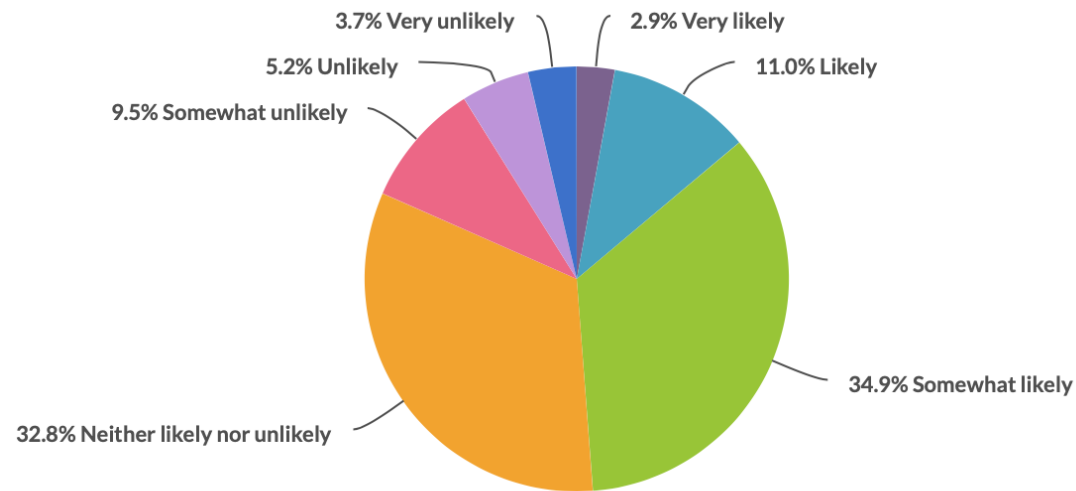
# If border/travel restrictions allow, how likely are you to visit The Islands of Guernsey in the next 12 months?

	Have visited before	Have not visited before	All
Very likely	45.9%	24.8%	40.9%
Likely	16%	16.3%	16.1%
Somewhat likely	17.1%	28%	19.7%
Neither likely nor unlikely	10.6%	16.8%	12.1%
Somewhat unlikely	5.3%	7.8%	5.9%
Unlikely	3.3%	3.7%	3.4%
Very unlikely	1.7%	2.5%	1.9%

# If border/travel restrictions allow, how likely are you to visit The Islands of Guernsey in the next 12 months?

	Leisure visitors	VFR	Business	All
Very likely	41.9%	70.6%	46%	40.9%
Likely	16.8%	11.4%	20%	16.1%
Somewhat likely	18.6%	7.3%	16%	19.7%
Neither likely not unlikely	11.8%	5.5%	10%	12.1%
Somewhat unlikely	5.6%	3.8%	4%	5.9%
Unlikely	3.4%	0.3%	4%	3.4%
Very unlikely	2%	1%	0%	1.9%

If border/travel restrictions allow, how likely are you to visit The Islands of Guernsey in the next 24-36 months?



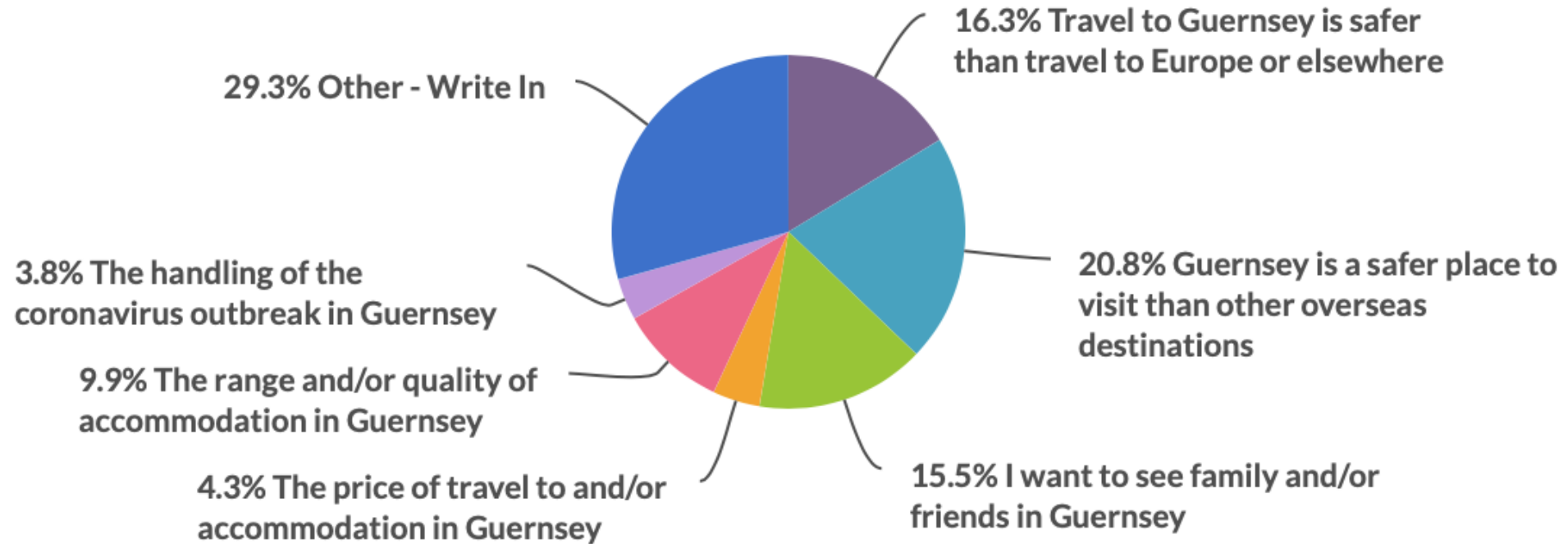
If border/travel restrictions allow, how likely are you to visit The Islands of Guernsey in the next 24-36 months?

	Have visited before	Have not visited before	All
Very likely	3.4%	1.6%	2.9%
Likely	10.1%	13%	11%
Somewhat likely	33.5%	37.8%	34.9%
Neither likely nor unlikely	31.3%	36.2%	32.8%
Somewhat unlikely	12.1%	3.8%	9.5%
Unlikely	5.7%	4.3%	5.2%
Very unlikely	3.9%	3.2%	3.7%

If border/travel restrictions allow, how likely are you to visit The Islands of Guernsey in the next 24-36 months?

	Leisure visitors	VFR	Business	All
Very likely	2.7%	N/A	N/A	2.9%
Likely	9%	N/A	N/A	11%
Somewhat likely	34.2%	N/A	N/A	34.9%
Neither likely not unlikely	33.3%	N/A	N/A	32.8%
Somewhat unlikely	11.7%	N/A	N/A	9.5%
Unlikely	4.5%	N/A	N/A	5.2%
Very unlikely	4.5%	N/A	N/A	3.7%

# What is your main influence on your decision to visit?



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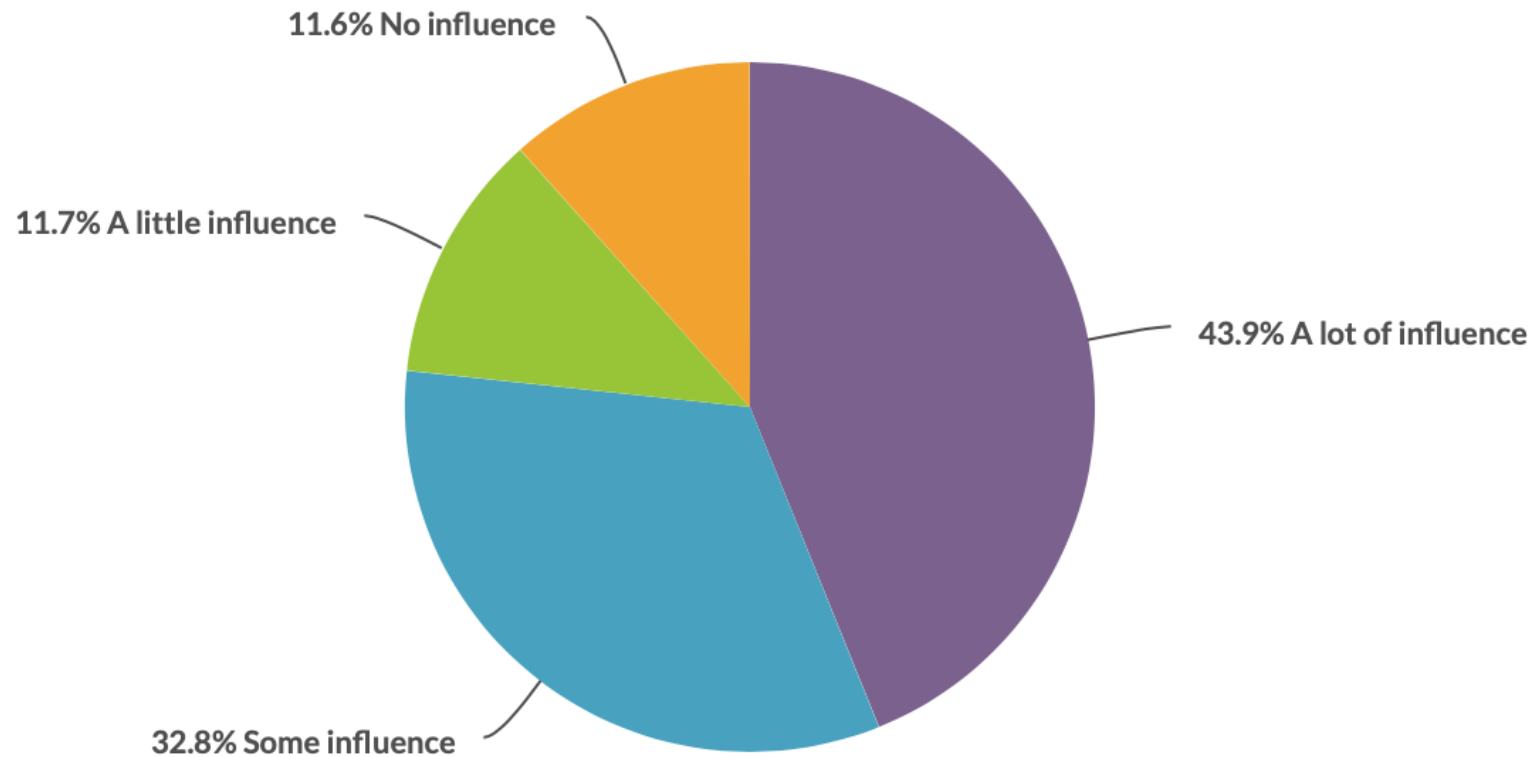
	Have visited before	Have not visited before	All
Travel to Guernsey is safer than travel to Europe or elsewhere	14.5%	22.5%	16.3%
Guernsey is a safer place to visit than other overseas destinations	20.2%	22.7%	20.8%
I want to see family and/or friends in Guernsey	19.2%	3.2%	15.5%
The price of travel to and/or accommodation in Guernsey	3.4%	7.5%	4.3%
The range and/or quality of accommodation in Guernsey	10.3%	8.7%	9.9%
The handling of the coronavirus outbreak in Guernsey	3.9%	3.4%	3.8%
Other	28.5%	32%	29.3%

# What is your main influence on your decision to visit?

	Leisure visitors	VFR	Business	All
Travel to Guernsey is safer than travel to Europe or elsewhere	16.8%	3.3%	N/A	16.3%
Guernsey is a safer place to visit than other overseas destinations	23.8%	4.7%	N/A	20.8%
I want to see family and/or friends in Guernsey	6%	85.4%	N/A	15.5%
The price of travel to and/or accommodation in Guernsey	4%	0.7%	N/A	4.3%
The range and/or quality of accommodation in Guernsey	13.1%	0.7%	N/A	9.9%
The handling of the coronavirus outbreak in Guernsey	4.5%	0.7%	N/A	3.8%
Other	31.9%	4.4%	N/A	29.3%



How much influence would knowing the Guernsey accommodation sector as a whole has the “Safe, Clean & Legal” accreditation have on your intention to visit The Islands of Guernsey over the next 12 months?



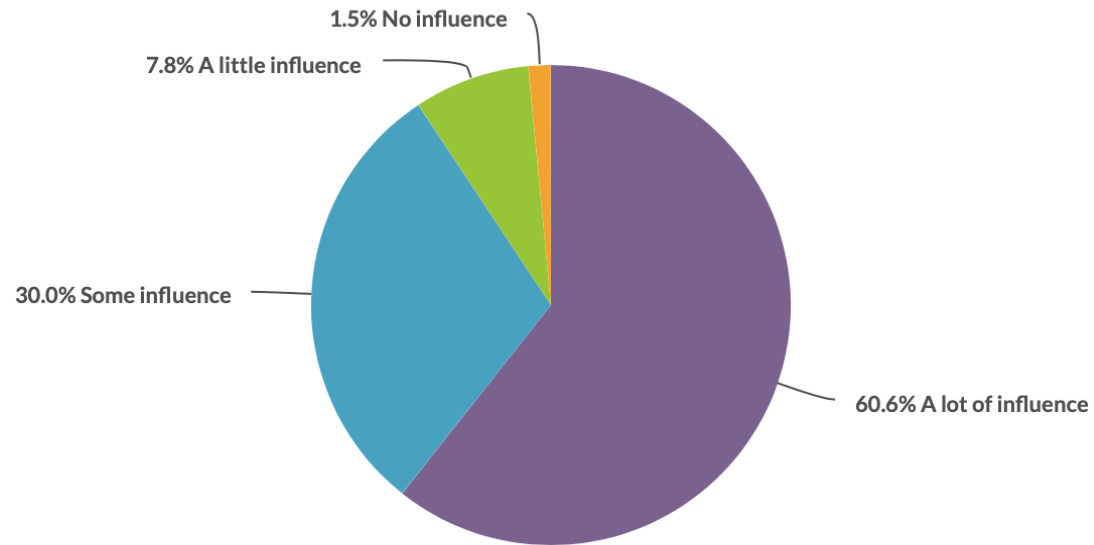
How much influence would knowing the Guernsey accommodation sector as a whole has the “Safe, Clean & Legal” accreditation have on your intention to visit The Islands of Guernsey over the next 12 months?

	Have visited before	Have not visited before	All
A lot of influence	43.1%	46.4%	43.9%
Some influence	32.8%	33%	32.8%
A little influence	11.7%	11.7%	11.7%
No influence	12.4%	8.9%	11.6%

How much influence would knowing the Guernsey accommodation sector as a whole has the “Safe, Clean & Legal” accreditation have on your intention to visit The Islands of Guernsey over the next 12 months?

	Leisure Visitors	VFR	Business	All
A lot of influence	44%	43.3%	22%	43.9%
Some influence	33.3%	29.1%	54%	32.8%
A little influence	11.8%	11.1%	12%	11.7%
No influence	11%	16.6%	12%	11.6%

How much influence would knowing an accommodation provider holds this Safe, Clean & Legal accreditation have on your choice of accommodation in The Islands of Guernsey?



How much influence would knowing an accommodation provider holds this Safe, Clean & Legal accreditation have on your choice of accommodation in The Islands of Guernsey?

	Have visited before	Have not visited before	All
A lot of influence	60%	62.8%	60.6%
Some influence	30.3%	29.1%	30.1%
A little influence	7.8%	8%	7.8%
No influence	2%	0.2%	1.5%

How much influence would knowing an accommodation provider holds this Safe, Clean & Legal accreditation have on your choice of accommodation in The Islands of Guernsey?

	Leisure Visitors	VFR	Business	All
A lot of influence	61.1%	58.8%	N/A	60.6%
Some influence	30.5%	26.5%	N/A	30.1%
A little influence	7%	10.1%	N/A	7%
No influence	1.5%	4.6%	N/A	1.5%

Please indicate the top 3 factors from the list below that would most positively influence you to visit Guernsey in the next 12 months?

Factors	%
The Guernsey accommodation's approach to cleanliness and safety measures in relation to Coronavirus	51.6%
The number of Coronavirus cases in Guernsey	50.6%
A Coronavirus vaccine is available	41.5%
A reciprocal health agreement with my country of residence	32.8%
Coronavirus infection rates in my country are lower	30.4%
More competitive travel and/or accommodation prices	29.3%
Other	11.6%
None of the above	6.8%
Requirements of my job	3.3%

Please indicate the top 3 factors from the list below that would most positively influence you to visit Guernsey in the next 12 months?

Factors	Have visited before	Have not visited before	All
The Guernsey accommodation's approach to cleanliness and safety measures in relation to Coronavirus	51.4%	52.4%	51.6%
The number of Coronavirus cases in Guernsey	49.5%	54.3%	50.6%
A Coronavirus vaccine is available	41.9%	40.1%	41.5%
A reciprocal health agreement with my country of residence	34.1%	28.7%	32.8%
Coronavirus infection rates in my country are lower	30.3%	30.7%	30.4%
More competitive travel and/or accommodation prices	27.5%	35.2%	29.3%
Other	12.6%	8.5%	11.6%
None of the above	7.1%	6%	6.8%
Requirements of my job	3%	4.2%	3.3%



Please indicate the top 3 factors from the list below that would most positively influence you to visit Guernsey in the next 12 months?

Factors	Leisure Visitors	VFR	Business	All
The Guernsey accommodation's approach to cleanliness and safety measures in relation to Coronavirus	54.8%	41.5%	46%	51.6%
The number of Coronavirus cases in Guernsey	50.4%	46%	44%	50.6%
A Coronavirus vaccine is available	42.8%	38.8%	30%	41.5%
A reciprocal health agreement with my country of residence	33.7%	37.7%	28%	32.8%
Coronavirus infection rates in my country are lower	30.2%	33.9%	26%	30.4%
More competitive travel and/or accommodation prices	27%	30.8%	36%	29.3%
Other	11.3%	14.9%	12%	11.6%
None of the above	6.6%	8.7%	8%	6.8%
Requirements of my job	2%	1.7%	34%	3.3%

# What could the Islands of Guernsey do to make you more likely to visit over the next 12 months?

- Safe environment
- Remove/reduce the requirement to self-isolate
- Package deals with cancellation/refund options
- Quarantine-free arrangement with country of residence
- It is not in Guernsey's hands – it depends on control of the virus elsewhere
- Show that both travel to Guernsey and hospitality venues in Guernsey are coronavirus safe
- Good offers on travel and accommodation
- Coronavirus testing on entry
- They can do no more – depends on when a vaccine is available
- Continue current approach
- Low rates of infection

# What could the Islands of Guernsey do to make you more likely to visit over the next 12 months?

- Make the health care arrangements clearer
- Free health care for covid related illness. Full refund on accommodation and flights if I get Covid
- Recognise a Coronavirus certificate of immunization
- Improve air links and ferry
- Make it clearer on your accommodation providers that there is a 14 day quarantine rule. I was shocked when I booked that no one told us about your special rules. Surely the operator should have been obligated to tell us. Shocking.
- More information on safe places to eat
- Keep Covid free. Apply measures to ensure safety and wellbeing as much as possible
- Affordable air travel and simply laid out (but still safe) C-19 prevention measures
- Keep doing what you are doing. You are doing very well right now.

# Summary

- 40.9% of respondents are very likely to visit in next 12 months if border/travel restrictions allow however there are still concerns over coronavirus and travel generally.
- Safety and cleanliness are big influences in people's decision making, with many saying a "Safe, Clean & Legal" accreditation would have an influence on their decision to visit as well as on their choice of accommodation going forward.