

Guernsey Travel Survey

Whole of 2019

Issue date February 2020

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

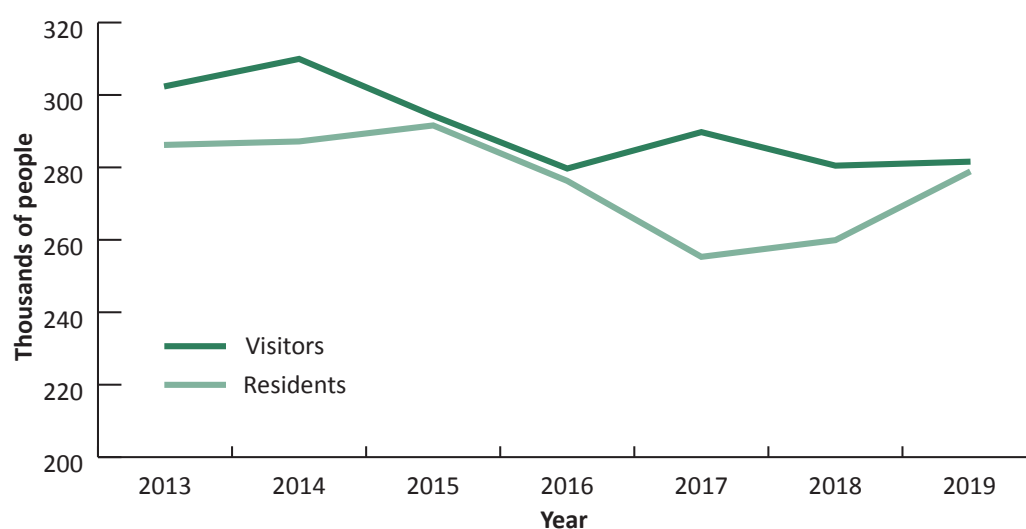
The Guernsey Travel Survey is based upon exit surveys undertaken at the airport and harbour, with the findings applied to the actual numbers of passengers (provided by the airport and harbour authorities). The methodology is more fully explained in [section 7.1](#) on [page 17](#). The purpose of these 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 2019

- The total number of departing passengers (both visitors and residents), not including cruise or yacht passengers, for January to December 2019 was 560,350, 4% higher than for January to December 2018.
- The total number of departing visitors, not including cruise and yacht passengers, for January to December 2019 was 281,581. The total number of departing residents was 278,770 in January to December 2019.
- 11% of visitors stayed for business purposes, 20% were visiting friends or relatives, 49% 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 January to December 2019 was 4.69 nights.
- 67% of visitors during January to December 2019 were from the UK, 10% from France, 7% from Jersey and the remainder from elsewhere.

Figure 1.2.1 Departing passenger numbers



1.3 Summary

Table 1.3.1 Summary of 2019 results compared with 2018

	Jan to Dec 2018	Jan to Dec 2019	% change
Total departing visitors (incl. cruise & yacht)	417,879#	413,694	-1
Total departing visitors (excl. cruise & yacht)	280,475	281,581	<1
Total departing residents	259,923	278,770	+7
Total departing passengers (incl. cruise & yacht)	677,802#	692,463	+2
Total departing passengers (excl. cruise & yacht)	540,398	560,350	+4
Total returning visitors	1,791	2,656	+48
Total passengers (incl. cruise & yacht)	679,593#	695,119	+2
Total passengers (excl. cruise & yacht)	542,189	563,006	+4
Departing visitors by air	184,339	179,506	-3
Departing visitors by sea	96,136	102,075	+6
Visitors staying for leisure purposes	134,186*	136,862	+2
Visitors staying with friends / relatives	56,924	56,520	-1
Visitors staying for business purposes	34,057	31,781	-7
Visitors staying for other/unknown purposes	7,705*	6,001	-22
Total staying visitors (excluding long stay)	232,852	231,164	-1
Long stay visitors	1,961	2,120	+8
Average length of stay (excluding long stay)	4.66 nights	4.69 nights	+1
Total number of bed nights	1,085,085	1,085,386	<1
Total staying in commercial accommodation	179,144	179,151	<1
Average stay in commercial accommodation	4.35 nights	4.31 nights	-1
Bed nights in commercial accommodation	778,744	772,096	-1
Day visitors for leisure purposes	22,301*	28,142	+26
Day visitors with friends / relatives	987	1,272	+29
Day visitors for business purposes	12,171	12,039	-1
Day visitors for other/unknown purposes	10,203*	6,845	-33
Total day visitors	45,662	48,297	+6
Visitors from the UK	201,500	187,456	-7
Visitors from France	20,343	29,452	+45
Visitors from Jersey	20,209	20,955	+4
Visitors from elsewhere	38,423	43,722	+14
Cruise ship passengers	118,708#	115,243	-3
Visiting yachtsmen	18,696	16,870	-10
Departing Guernsey residents by air	204,159	233,869	+15
Departing Guernsey residents by sea	55,765	44,900	-19
Net Promoter Score	56.8	59.6	+5

restated since 2018 report due to additional information becoming available

* these figures were not separated out in the 2018 publication

2.2 Total departing passengers

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

Year	Number by air	Number by sea
2015	411,879	173,999
2016	403,602	152,362
2017	390,147	154,905
2018	388,497	151,901
2019	413,375	146,975

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

	Number of Visitors	Number of Residents
2015	185,407	226,472
2016	188,533	215,069
2017	184,625	205,522
2018	184,339	204,159
2019	179,506	233,869

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

	Number of Visitors	Number of Residents
2015	108,882	65,117
2016	91,158	61,204
2017	105,120	49,785
2018	96,136	55,765
2019	102,075	44,900

As shown in **Table 2.2.1**, in January to December 2019 there were 413,375 departing passengers by air and 146,975 by sea (these figures include returning visitors). This represents a 6% increase in air passenger numbers and a 3% decrease in sea passengers since the same period in 2018.

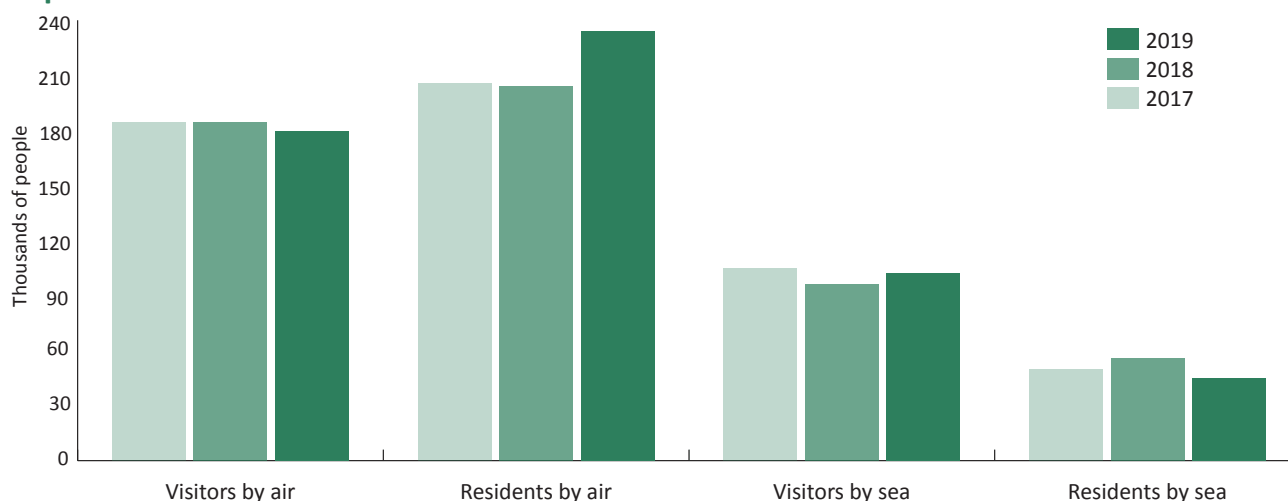
Tables 2.2.2 and **2.2.3** show the number of departing residents and departing visitors by mode of transport (except those visitors who were returning to Guernsey after, for example, a day trip elsewhere).

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

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

	Number of passengers	% departing visitors	% returning visitors	% residents
2015	586,560	50.2	0.1	49.7
2016	557,465	50.2	0.3	49.5
2017	546,918	53.0	0.3	46.7
2018	542,189	51.7	0.3	47.9
2019	563,006	50.0	0.5	49.5

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



2.3 Departing visitors - by purpose of visit

Table 2.3.1 shows the number of departing visitors during 2019 broken down by purpose of visit. In 2019 the highest proportion of visitors were staying leisure visitors (49%) followed by people visiting friends or family (20%). In Q4 2018 the respective percentages were 48% and 20%.

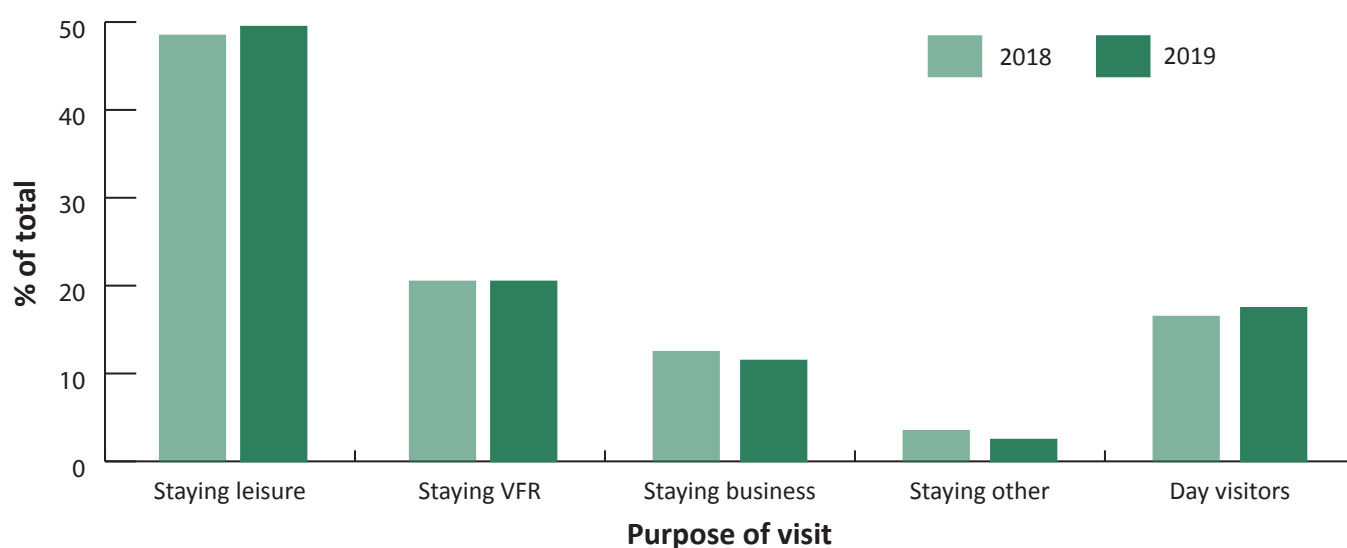
The total number of day visitors was 48,297 in 2019, 17% of total visitors. The equivalent figure in 2018 was 45,662, which was 16% of the total visitors for that period.

Table 2.3.1 Departing visitors by purpose of visit

Purpose	2018		2019	
	Number	%	Number	%
Staying leisure	134,166*	48	136,862	49
Visiting friends / relatives	56,924	20	56,520	20
Staying business	34,057	12	31,781	11
Staying other / unknown	7,705*	3	6,001	2
Day visit leisure	22,301*	8	28,142	10
Day visit friends / relatives	987	<1	1,272	<1
Day visit business	12,171	4	12,039	4
Day visit other / unknown	10,203*	4	6,845	2
Long stay visitors	1,961	1	2,120	1
TOTAL	280,475	100	281,581	100

* in the 2018 report these figures were not separated out

Figure 2.3.1 Departing visitors by purpose of visit



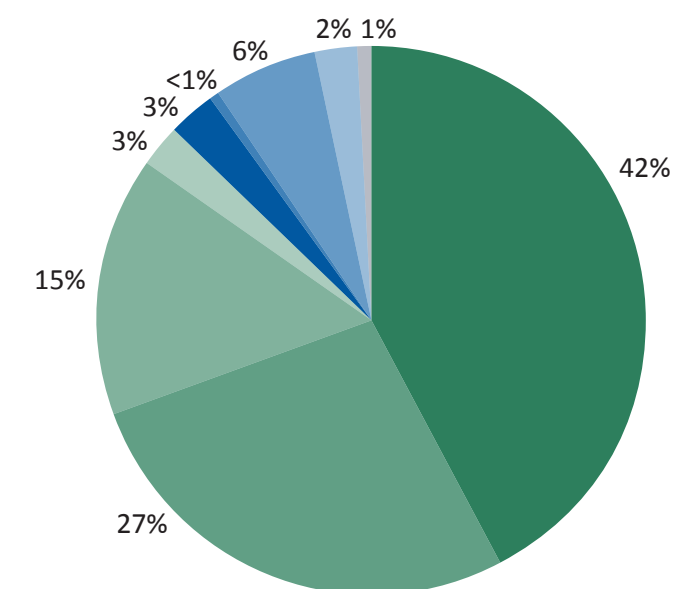
2.3 Departing visitors - by purpose of visit (continued)

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

Table 2.3.2 Departing visitors by mode of transport and purpose of visit

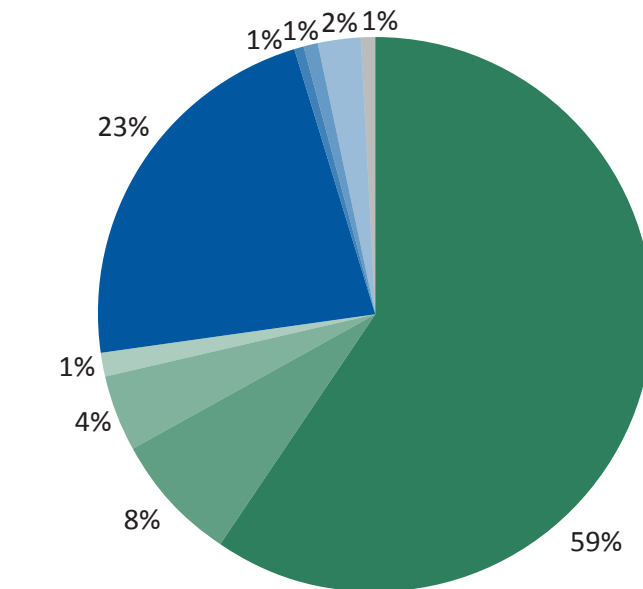
Purpose	By air	By sea
Staying leisure	76,142	60,720
Visiting friends / relatives	48,661	7,859
Staying business	27,324	4,457
Staying other/unknown	4,612	1,389
Day visit leisure	5,170	22,971
Day visit friends / relatives	730	542
Day visit business	11,071	968
Day other/unknown	4,435	2,409
Long stay visitors	1,361	759
TOTAL	179,506	102,075

Figure 2.3.2 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

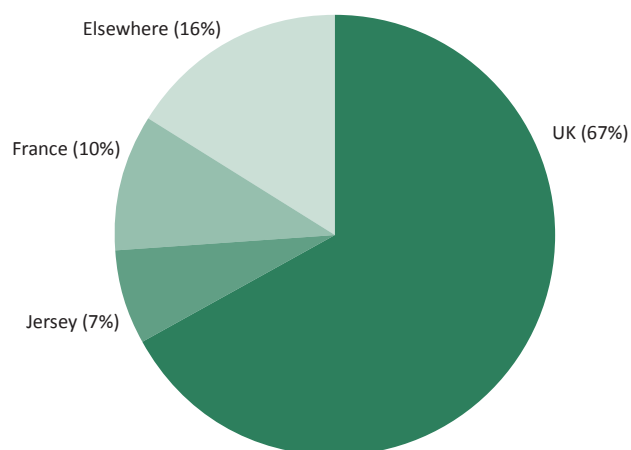
Figure 2.3.3 2019 departing visitors by sea - purpose of visit



- 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 - by country of residence

Figure 2.4.1 2019 departing visitors by country of residence



The majority of visitors during 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 (4%), the Netherlands (2%) the USA (1%) and Australia (1%).

Table 2.4.1 Percentage of departing visitors by country of residence

	UK	Jersey	France	Elsewhere
2015	73	9	6	12
2016	72	9	8	11
2017	71	8	9	12
2018	72	7	7	14
2019	67	7	10	16

2.5 Departing visitors - by accommodation and length of stay

Table 2.5.1 2019 departing visitors by type of accommodation

	2019	% of total
Hotel	143,504	62
Guest accom.	7,149	3
Self catering	16,272	7
Camping	5,233	2
Friends/relatives	52,116	23
Other	6,992	3

More people stayed in hotel accommodation than in any other type of accommodation in 2019 (62%) (**Table 2.5.1**).

The overall average length of stay was 4.69 nights in 2019.

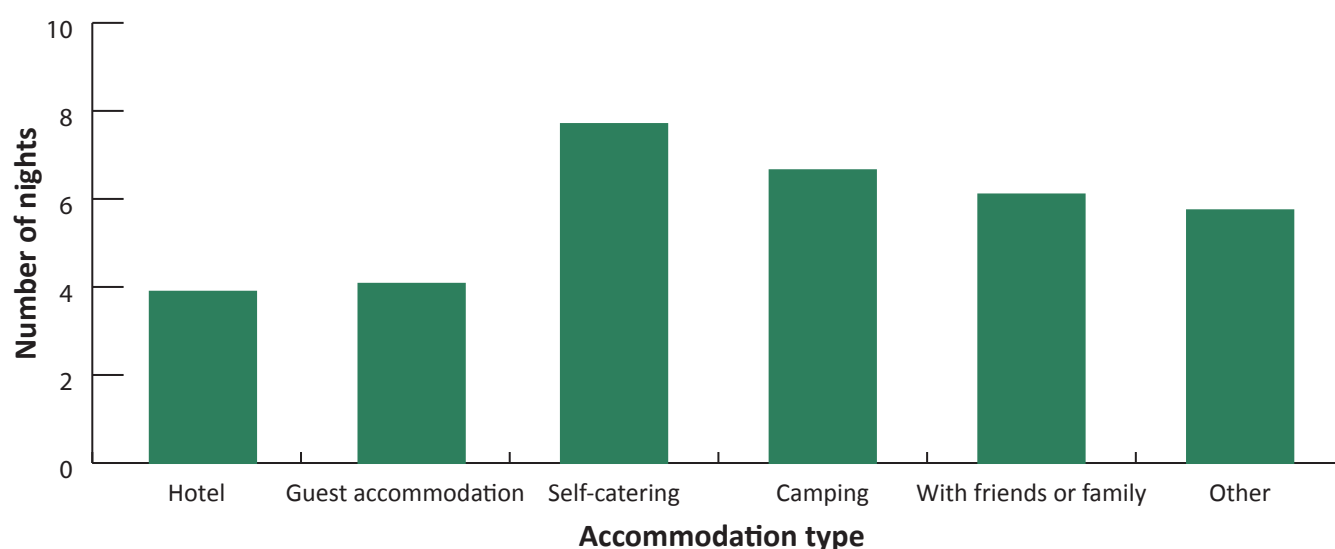
In total there were 1,085,386 overnight stays in 2019, of which 772,096 were in commercial accommodation.

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

	Average length of stay
2015	4.88
2016	4.75
2017	4.85
2018	4.66
2019	4.69

In 2018 these figures were 1,085,085 and 778,744, giving changes of <1% and -1% respectively.

Figure 2.5.1 Average length of stay by accommodation type 2019



2.6 Departing visitors - day visitors

Table 2.6.1 Day visitors as percentage of total departing visitors

	Departing day visitors	Total departing visitors	Day visitors as % total departing visitors
2015	61,798	294,288	21
2016	50,102	279,691	18
2017	53,957	289,745	19
2018	45,662	280,475	16
2019	48,297	281,581	17

The majority of departing visitors on a day trip were travelling by sea (57% in 2019).

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

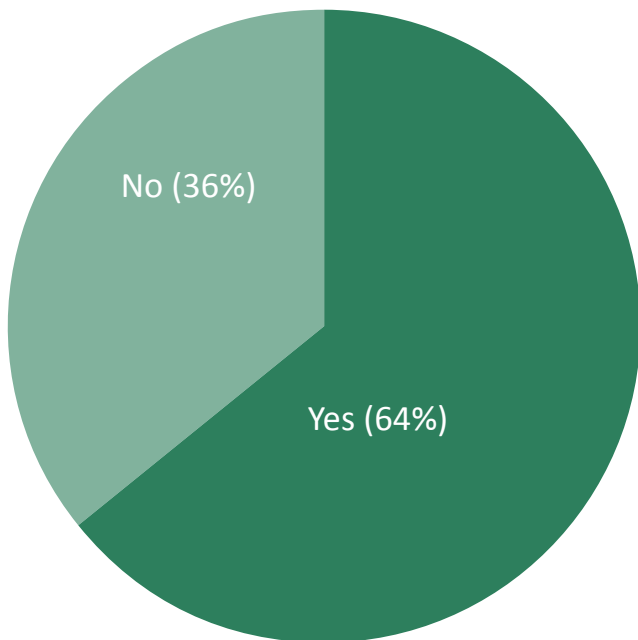
Table 2.6.2 shows that 58% of day visits were for leisure purposes, and 25% for business purposes.

Table 2.6.2 Day visitors

	2019	
	Number	%
Day visit leisure	28,142	58
Day visit friends / relatives	1,272	3
Day visit business	12,039	25
Day visit other	6,845	14
Total day visitors	48,297	100

2.7 Previous visits to Guernsey - 2019

Figure 2.7.1 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.

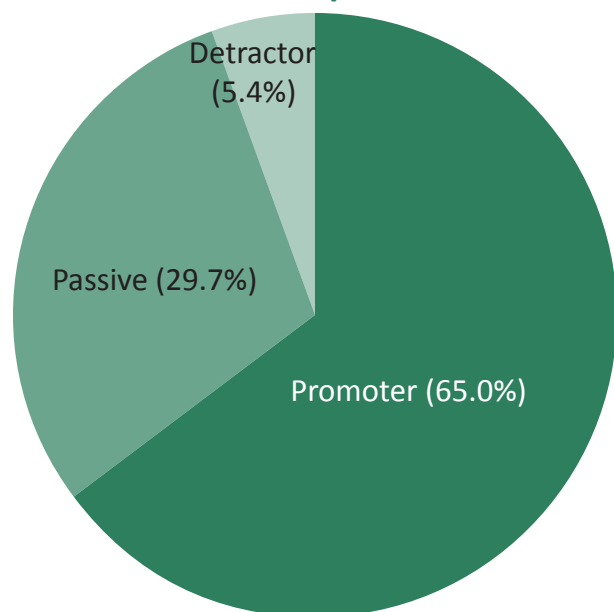
In 2019, 64% of all visitors had been to Guernsey previously.

For those visiting by air, 70% had been before and for those travelling by sea, 52%.

Of those who had visited previously, 2.9% had visited on a cruise ship.

3.1 Recommendations of Guernsey - 2019

Figure 3.1.1 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 2019 the NPS was 59.6. This compares with 56.8 in 2018.

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

Table 3.1.1 2019 number of promoters, passives and detractors

	2019	
	Number	as %
Promoters	7,771	65.0
Passives	3,547	29.7
Detractors	643	5.4
Net Promoter Score		59.6

4.1 Departing residents

Table 4.1.1 Departing residents

	Total number	as % of total departing passengers
2015	291,590	50
2016	276,274	50
2017	255,307	47
2018	259,923	48
2019	278,770	50

The number of departing residents was 278,770 in 2019.

The majority of departing residents travelled by air (84%) as can be seen in [Table 4.1.2](#).

Table 4.1.2 Departing residents by mode of transport

	by air	by sea
2015	226,472	65,117
2016	215,069	61,204
2017	205,522	49,785
2018	204,159	55,765
2019	233,869	44,900

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 2019, 20% of all passengers were flying on to another airport. 57,532 Guernsey residents (25% of total) and 23,243 departing visitors (13% of total) were flying onwards in 2019.

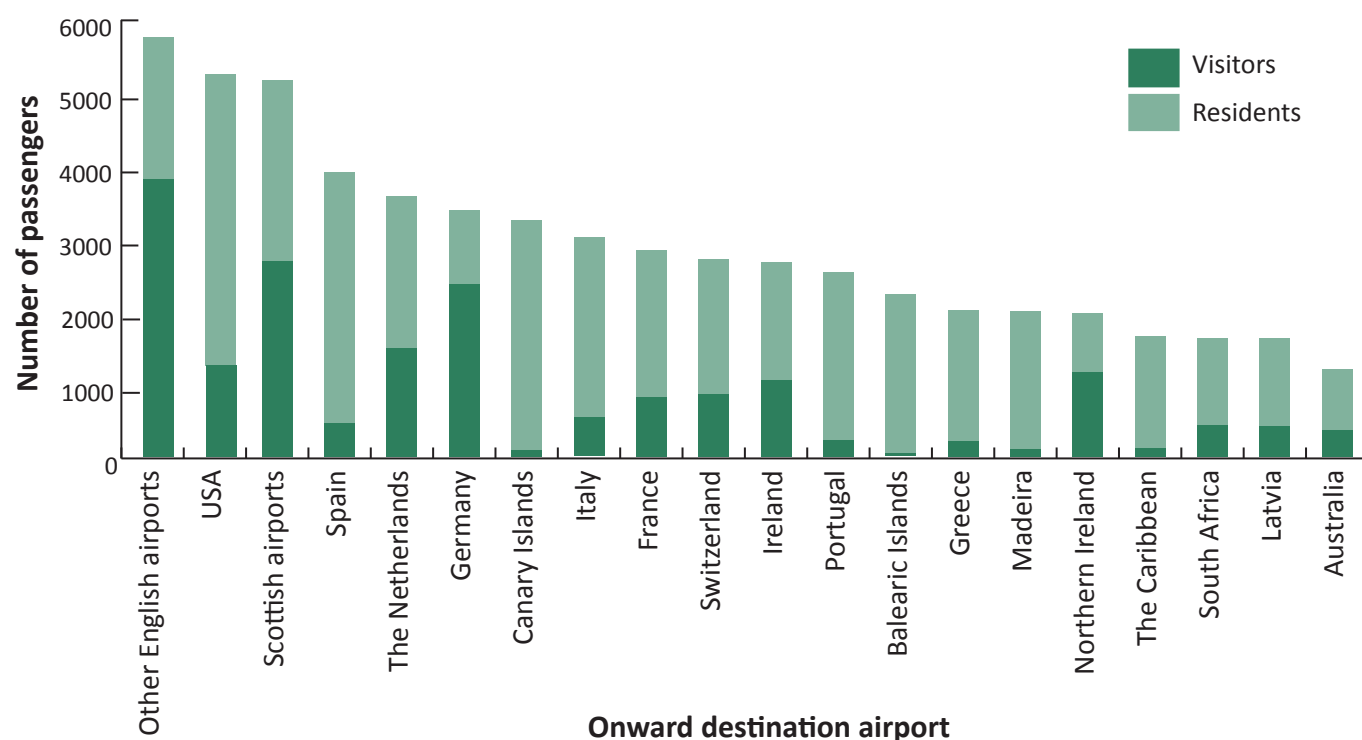
Table 5.1.1 Onward flights

Initial destination airport	Visitor departures	Visitors travelling onward	Resident departures	Residents travelling onward
Birmingham	7,062	656	6,755	1,077
Bristol	7,030	72	4,280	514
East Midlands	6,759	21	2,897	42
Exeter	8,299	466	6,340	275
Gatwick	51,192	9,419	103,207	42,967
Manchester	17,075	732	15,633	1,641
Southampton	32,205	5,599	42,603	4,921
Stansted	6,878	786	4,736	1,039
Heathrow	7,823	1,948	5,809	2,443
Southend	4,232	213	1,364	189
Other UK airports	5,823	38	2,327	243
Jersey	21,482	3,294	36,851	2,181
Foreign airports	3,646	0	1,067	0
Total	179,506	23,243	233,869	57,532

5.1 Onward flights (continued)

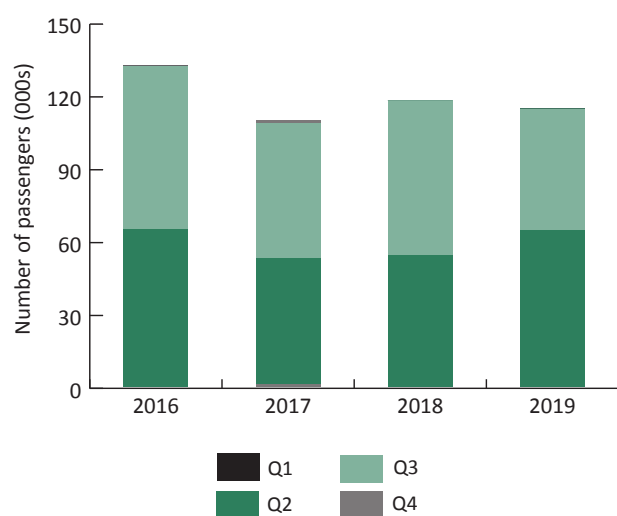
The most popular destinations for onward travel are shown in **Figure 5.1.1**. The highest number of passengers were flying on to other English airports, the USA and Scotland. The most popular destinations for departing visitors were other English airports, Scotland, the Netherlands and Germany.

Figure 5.1.1 Most popular destinations for onward travel



6.1 Cruise passengers

Figure 6.1.1 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 2019, there were total of 115,243 landed passengers.

Table 6.1.1 Cruise passenger numbers

	2018	2019
Q1	-	-
Q2	54,027*	64,364
Q3	64,681	50,721
Q4	-	158

* restated since 2018 publication

6.2 Visiting yachtsmen

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 2019 there were 16,870 visiting yachtsmen.

Figure 6.2.1 Q4 Visiting yachtsmen

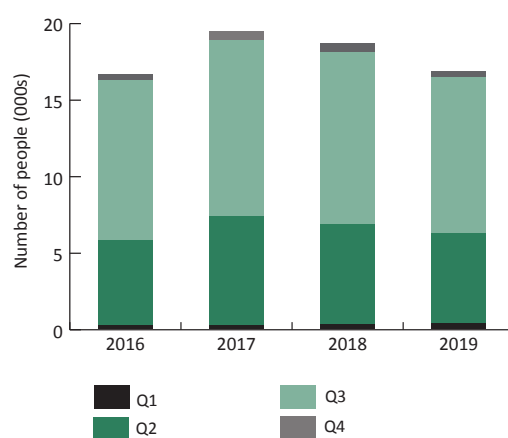


Table 6.2.1 Visiting yachtsmen

	2018	2019
Q1	286	337
Q2	6,506	5,905
Q3	11,363	10,278
Q4	541	350

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 2019, 25,410 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 52,330 passengers, which is 9.3% of the total number of passengers departing Guernsey during 2019 (excluding inter-Bailiwick travel).

All sample surveys are subject to a degree of statistical error. This quarter there were 25,410 interviews conducted and it was found that 50.0% of respondents were departing visitors. With a 95% confidence level, the margin of error is plus/minus 0.6% - in other words, there is a 95% probability that the proportion of departing visitors lies within the range of 49.4% to 50.6%. 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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