Guernsey Travel Survey

Quarter 1 2018
Issue date April 2018

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

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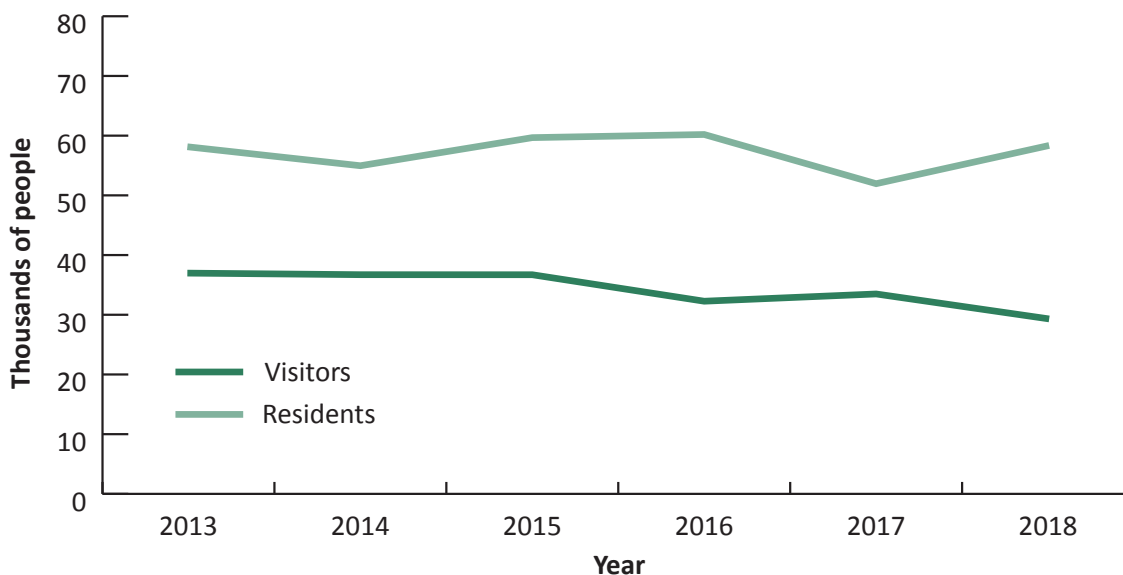
It should be noted that the figures in this report do not include inter-Bailiwick travel (Alderney, Sark and Herm).

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 2018

- The total number of departing **passengers** (both visitors and residents) for Q1 2018 was 88,080.

- The total number of departing **visitors** for Q1 2018 was 29,330. The total number of departing **residents** was 58,315 in Q1 2018.

- Of the 29,330 departing visitors in Q1 2018, 85% travelled by air and 15% by sea.

- 27% of visitors stayed for business purposes, 29% were visiting friends or relatives, 24% 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 Q1 2018 was 4.44 nights.

- 70% of visitors during Q1 2018 were from the UK, 4% from France, 14% from Jersey and the remainder from elsewhere.

Figure 1.2.1 Q1 departing passenger numbers

Table 1.3.1 Summary of Q1 2018 results compared with Q1 2017

	Q1 2017	Q1 2018	% change
Total departing visitors	33,484	29,330	-12
Total departing residents	51,954	58,315	+12
Total returning visitors	367	435	+19
Total departing passengers	**85,805**	**88,080**	**+3**
Departing visitors by air	28,805	25,000	-13
Departing visitors by sea	4,679	4,330	-7
Visitors staying for leisure purposes	8,991	6,945	-23
Visitors staying with friends / relatives	8,786	8,553	-3
Visitors staying for business purposes	8,670	7,824	-10
Total staying visitors (excluding long stay)	**26,447**	**23,323**	**-12**
Average length of stay (excluding long stay)	4.09 nights	4.44 nights	+9
Total number of bed nights	108,076	103,442	-4
Total staying in commercial accommodation	17,885	15,052	-16
Average stay in commercial accommodation	3.16 nights	3.14 nights	<-1
Bed nights in commercial accommodation	56,527	47,232	-16
Day visitors for leisure purposes	2,105	1,932	-8
Day visitors with friends / relatives	142	230	+62
Day visitors for business purposes	4,188	3,184	-24
Total day visitors	**6,434**	**5,346**	**-17**
Visitors from the UK	25,198	20,567	-18
Visitors from France	643	1,050	+63
Visitors from Jersey	4,989	4,183	-16
Visitors from elsewhere	2,654	3,476	+31
Long stay visitors	603	662	+10
Cruise ship passengers	1,108		
Visiting yachtsmen	219	286	+31
Departing Guernsey residents by air	44,886	50,457	+12
Departing Guernsey residents by sea	7,068	7,858	+11
Net Promoter Score	38.8	41.2	+6

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

As shown in **Table 2.1.1**, in Q1 2018 there were 75,456 departing passengers by air and 12,189 by sea (these figures include returning visitors). This represents a 2% increase in air passenger numbers and a 4% increase in sea passengers since Q1 2017.

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

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 Q1.

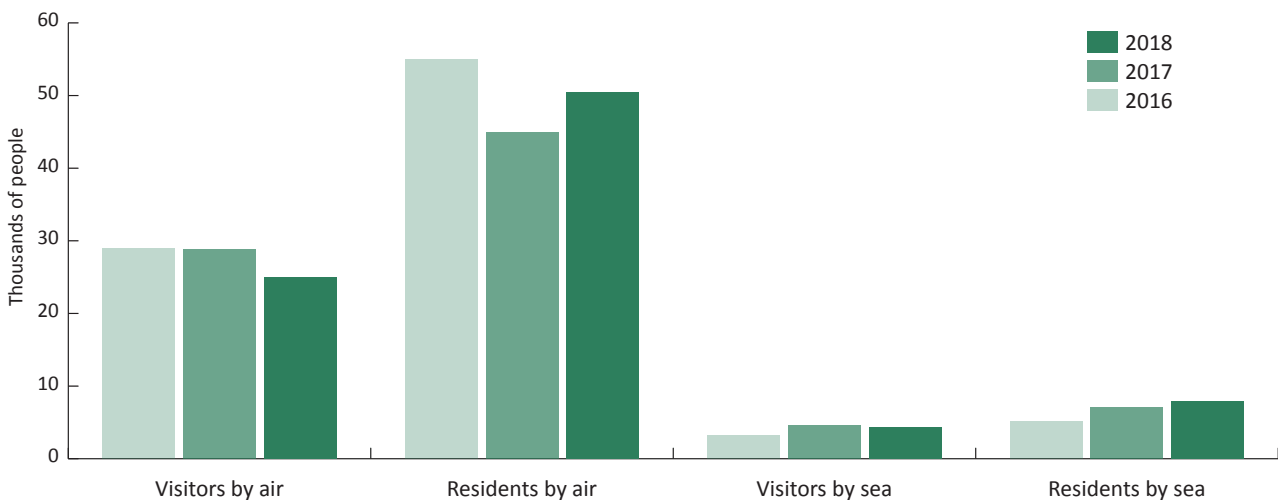### Table 2.1.3 Q1 total departing passengers by sea and by type

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

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

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

Table 2.2.1 Q1 departing visitors by air

Year	By air	
	Number	**% change**
2013	32,270	-
2014	32,168	-0.3
2015	30,719	-4.5
2016	28,971	-5.7
2017	28,805	-0.6
2018	25,000	-13.2

Table 2.2.2 Q1 departing visitors by sea

Year	By sea	
	Number	**% change**
2013	4,704	-
2014	4,545	-3.4
2015	5,986	+31.7
2016	3,299	-44.9
2017	4,679	+41.8
2018	4,330	-7.5

As shown in **Table 2.2.1** and **Table 2.2.2**, in Q1 2018 there were 25,000 departing visitors by air and 4,330 by sea.
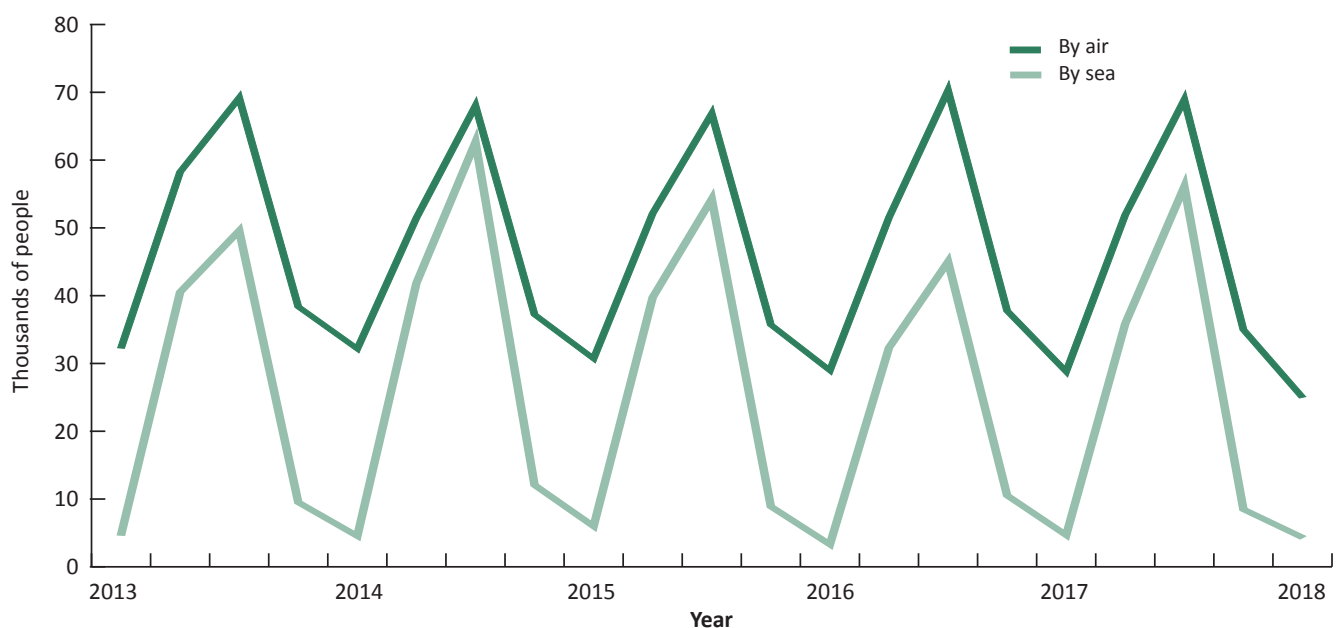
This compares with 28,805 by air and 4,679 by sea in Q1 of 2017.

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.

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 2018 broken down by purpose of visit. In Q1 2018 the highest proportion of visitors were staying with friends or relatives (VFR) (29%), followed by visitors staying for business purposes (27%).
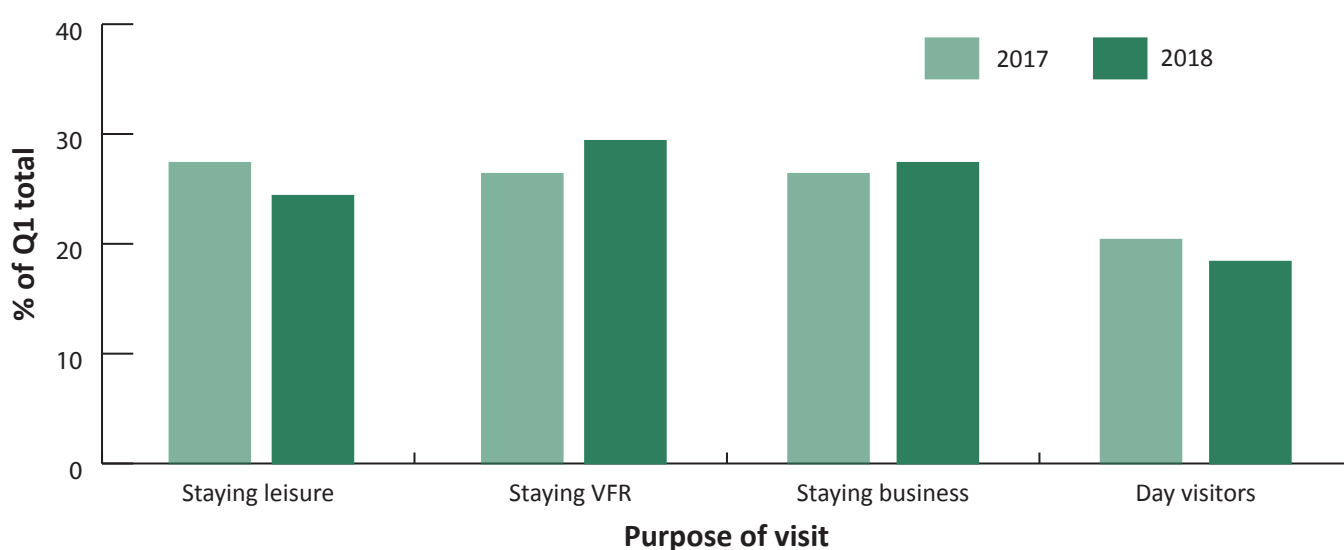
In Q1 2017 the respective percentages were 26% and 26%.

The total number of day visitors during Q1 was 5,346 in 2018, 18% of total visitors. The equivalent figure in Q1 2017 was 6,434, which was 19% of the total visitors for that period.

Table 2.3.1 Q1 departing visitors by purpose of visit

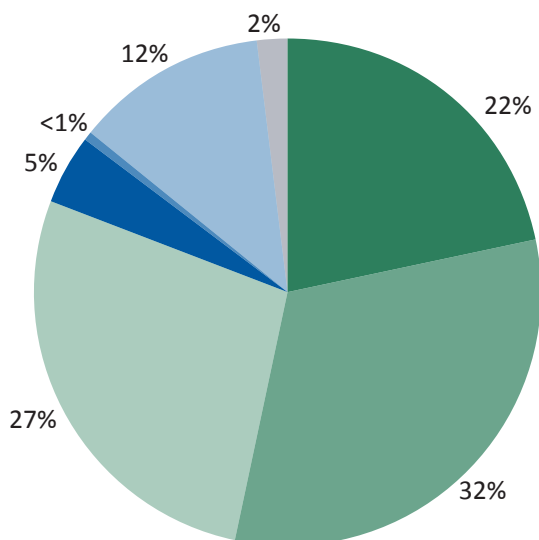| Purpose		2017		2018
	Number	%	Number	%
Staying leisure	8,991	27	6,945	24
Visiting friends / relatives	8,786	26	8,553	29
Staying business	8,670	26	7,824	27
Day visit leisure	2,105	6	1,932	7
Day visit friends / relatives	142	<1	230	<1
Day visit business	4,188	13	3,184	11
Long stay visitors	603	2	662	2
TOTAL	**33,484**	**100**	**29,330**	**100**

Figure 2.3.1 Q1 departing visitors by purpose of visit

Table 2.3.2 shows the number of departing visitors during Q1 2018 broken down by mode of transport and purpose of visit. In Q1 2018 the highest proportion of visitors by air were staying leisure visitors (58% and 61% respectively). For visitors travelling by air, the next highest proportion was for those staying at least one night with friends or family, whereas for visitors travelling by sea, the second highest was day trips for leisure purposes.

Table 2.3.2 Q4 departing visitors by mode of transport and purpose of visit
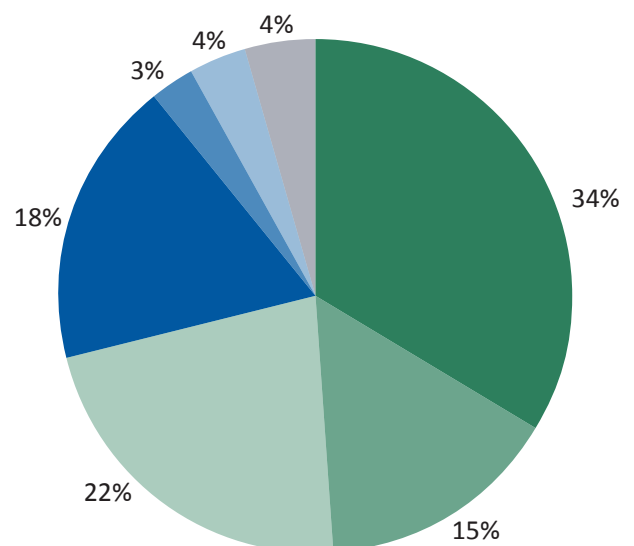
Purpose		By air				By sea
	2017	**2018**	**% change**	**2017**	**2018**	**% change**
Staying leisure	7,514	5,481	-27	1,477	1,464	-1
Visiting friends / relatives	7,591	7,892	+4	1,195	661	-45
Staying business	7,440	6,864	-8	1,230	960	-22
Day visit leisure	1,640	1,147	-30	465	785	+69
Day visit friends / relatives	75	117	+56	67	114	+70
Day visit business	4,052	3,027	-25	135	157	+16
Long stay visitors	494	471	-5	109	191	+75
TOTAL	**28,805**	**25,000**	**-13**	**4,679**	**4,330**	**-7**

Figure 2.3.2 Q1 2018 departing visitors by air - purpose of visit

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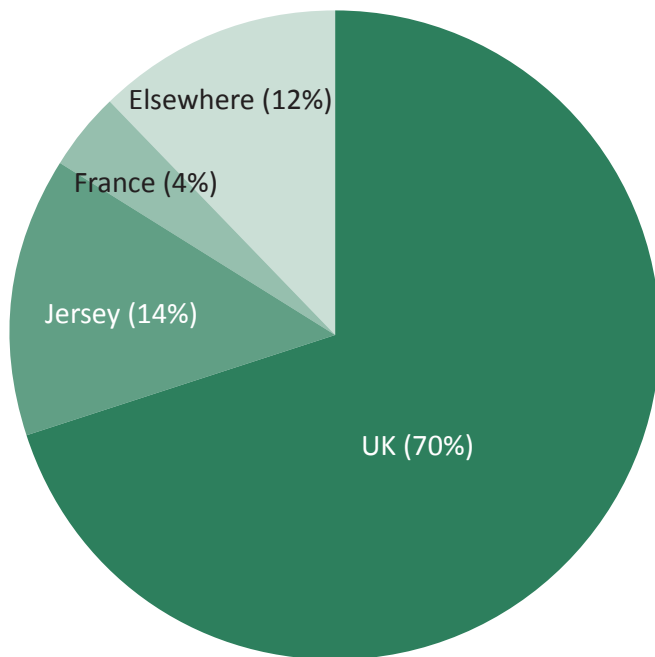- Day trip friends / relatives
- Day trip business
- Long stay

Figure 2.3.3 Q1 2018 departing visitors by sea - purpose of visit

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

Figure 2.4.1 Q1 2018 departing visitors by country of residence

The majority of visitors during Q1 2018 were from the UK, as can be seen in **Figure 2.7.1** and **Table 2.4.1**.

Within the "Elsewhere" category, the most common countries were Switzerland, Germany, Portaugal and the USA.

Table 2.4.1 Q1 departing visitors by country of residence

	UK	Jersey	France	Elsewhere
2013	26,617	6,910	853	2,590
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	20,057	4,183	1,050	3,476

2.5 Departing visitors Q1 - by accommodation and length of stay

Table 2.5.1 Q1 2018 departing visitors by type of accommodation

	2018	% of total
Hotel	13,874	59
Guest accom.	279	1
Self catering	457	2
Camping	13	<1
Friends/relatives	8,269	35
Other	429	2

Table 2.5.2 Q1 2018 average length of stay (number of nights)

	Average length of stay
2013	3.99
2014	4.07
2015	4.09
2016	4.03
2017	4.09
2018	4.44

More people stayed in hotel accommodation than in any other type of accommodation in Q1 2018 (59%) (**Table 2.5.1**).

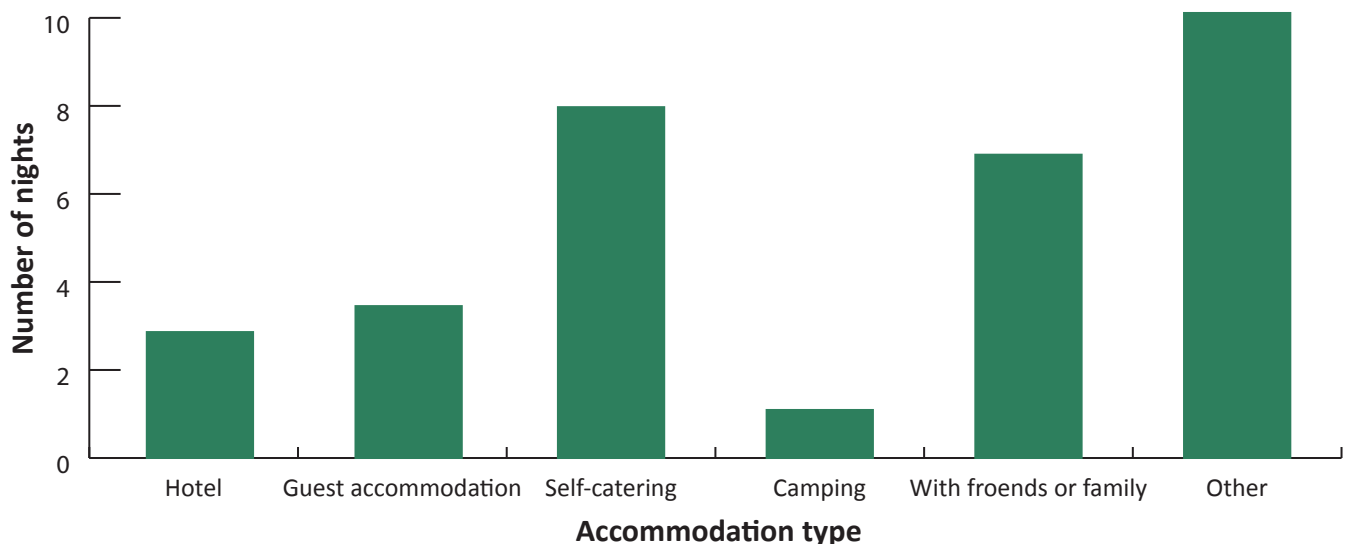The overall average length of stay was 4.44 nights in Q1 2018.

In total there were 103,442 overnight stays in Q1 2018, of which 47,232 were in commercial accommodation.

In Q1 2017 these figures were 108,076 and 56,527, giving decreases of 4% and 16% respectively.

Figure 2.5.1 Average length of stay by accommodation type Q1 2018

2.6 Departing visitors Q1 - day visitors

Table 2.6.1 Q1 day visitors as percentage of total departing visitors

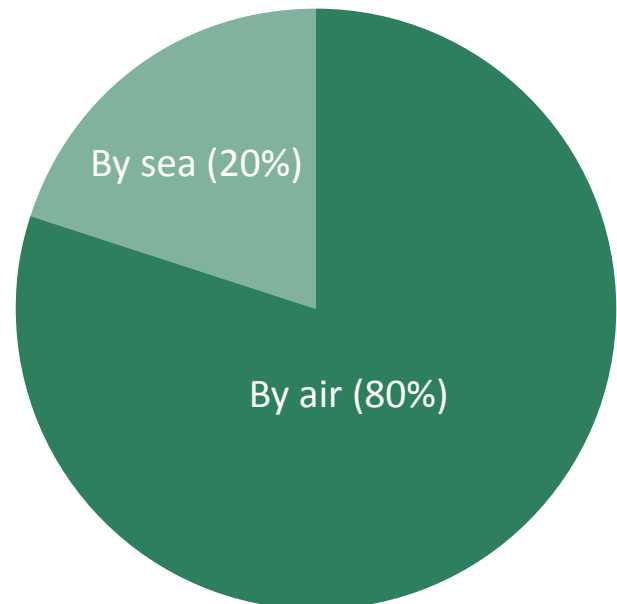|	Departing day visitors	Total departing visitors	Day visitors as % total departing visitors
2013	9,897	36,974	27
2014	9,550	36,714	26
2015	7,555	36,705	21
2016	6,095	32,270	19
2017	6,434	33,484	19
2018	5,346	29,330	18

Table 2.6.2 Q1 day visitors

	2018	
	Number	**%**
Day visit leisure	1,932	36
Day visit friends / relatives	230	4
Day visit business	3,184	60
Total day visitors	5,346	100

The majority of departing visitors on a day trip were travelling by sea (80% in Q1 2018), as shown in **Figure 2.6.1**.

As a percentage of overall departing visitors, day visitors comprised 18% of the total (**Table 2.6.1**).
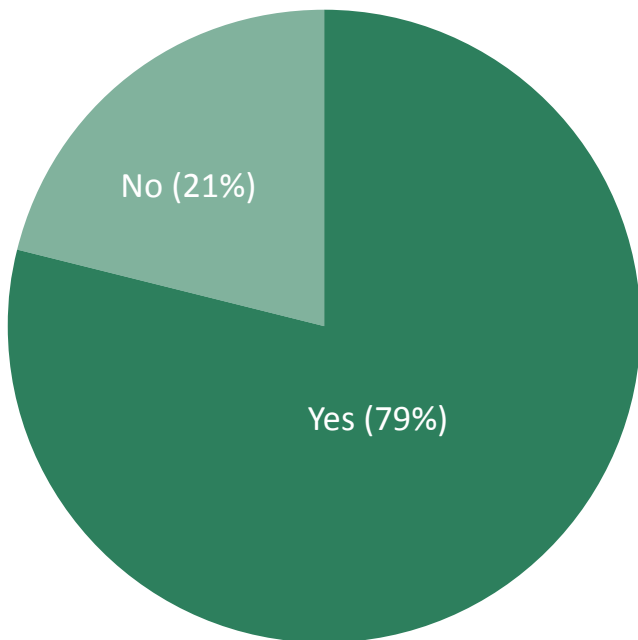
Table 2.6.2 shows that 36% of day visits were for leisure purposes, and 60% for business purposes.

Figure 2.6.1 Q1 2018 day visitors by mode of transport

By sea (20%)

By air (80%)

2.7 Previous visits to Guernsey - Q1 2018

Figure 2.7.1 Q1 visitors who had visited Guernsey previously
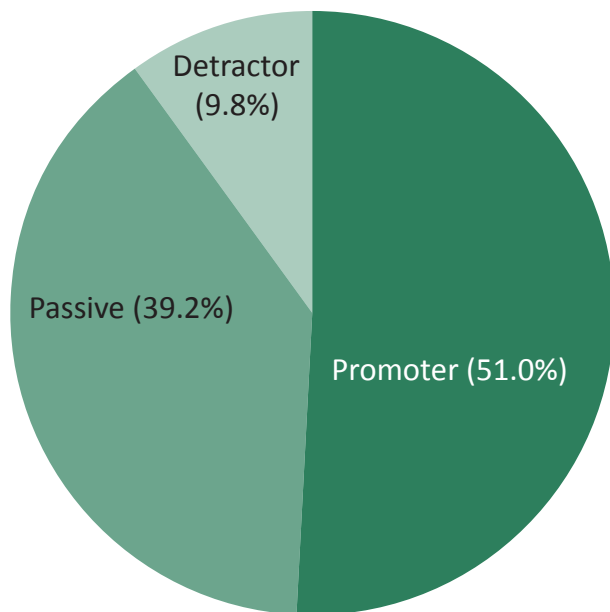

Respondents were asked if they had visited Guernsey before and, if so, had they visited on a cruise ship.

In Q1 2018, 79% of all visitors had been to Guernsey previously.

Of those who had visited previously, 1.6% had visited on a cruise ship.

Figure 3.1.1 Q1 2018 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 2018 the NPS was 41.2. This compares with 38.8 in Q1 2017.

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

		2018
	Number	as %
Promoters	918	51
Passives	707	39
Detractors	176	10
Net Promoter Score	41.2	-

Table 4.1.1 Q1 departing residents

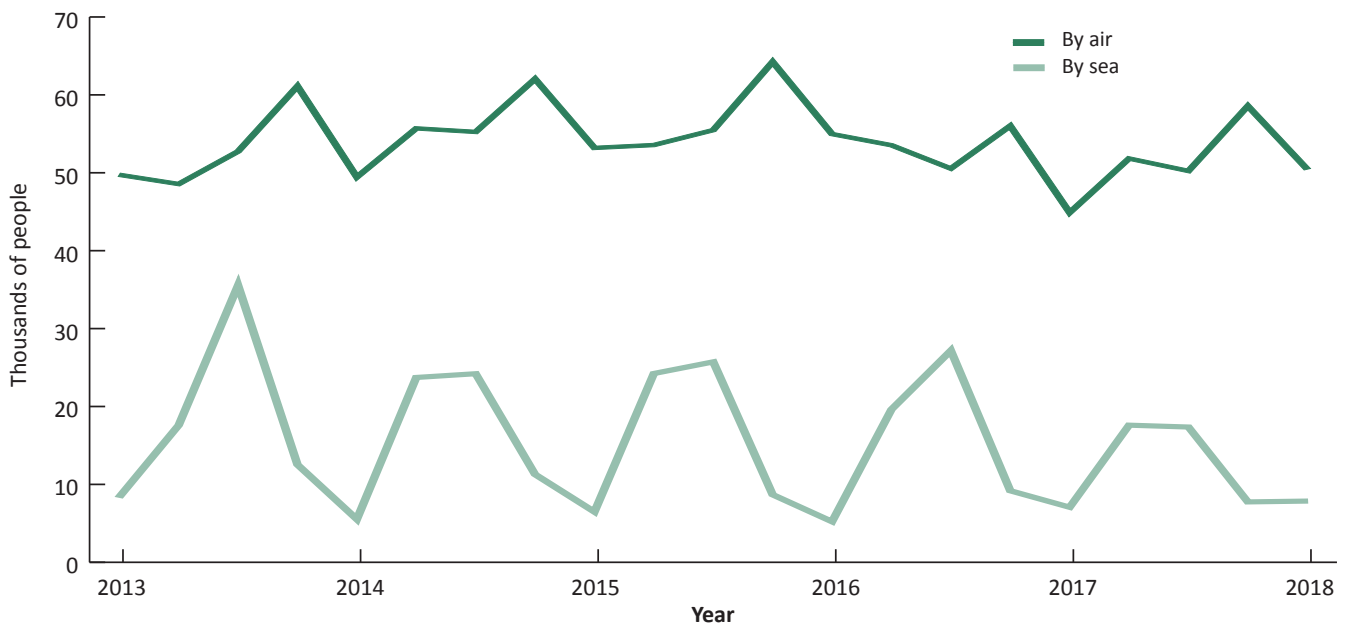|	Total number	as % of total departing passengers
2013	58,119	61.1
2014	54,963	60.0
2015	59,670	61.9
2016	60,194	65.0
2017	51,954	60.5
2018	58,315	66.2

The number of departing residents was 58,315 in Q1 2018.

The majority of departing residents travelled by air (87%) as can be seen in **Table 4.1.2**.

Table 4.1.2 Q1 departing residents by mode of transport

	by air	by sea
2013	49,740	8,379
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

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 2018, 24% of all passengers were flying on to another airport. 14,214 Guernsey residents (28% of total) and 3,676 departing visitors (15% of total) were flying onwards in the first quarter of 2018.
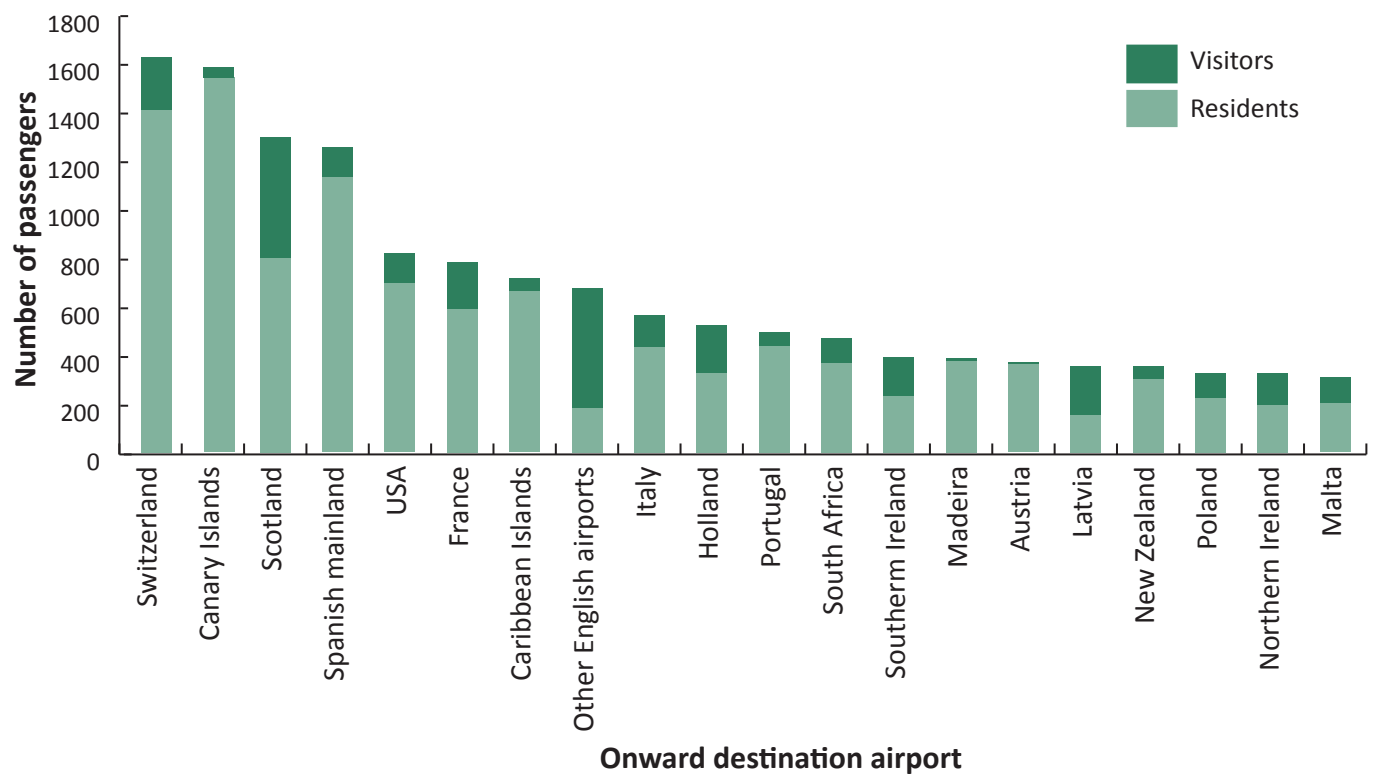
Table 5.1.1 Q1 Onward flights

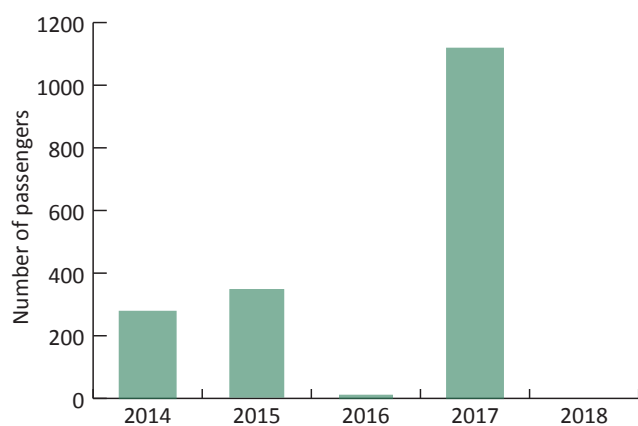| Initial destination airport	Visitor departures	Visitors travelling onward	Resident departures	Residents travelling onward
Birmingham	1,576	252	1,593	382
Bristol	581	-	1,119	-
East Midlands	455	-	543	11
Exeter	1,222	12	1,558	109
London City	2	-	3	-
Gatwick	9,649	2,123	24,999	11,750
Manchester	2,682	80	3,400	238
Southampton	3,895	623	7,635	1,069
Stansted	931	242	980	421
Other UK airports	52	-	57	-
Jersey	3,815	343	7,811	234
Foreign airports	140	-	759	-
Total	**25,000**	**3,676**	**50,457**	**14,214**

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

Figure 5.1.1 Most popular destinations for onward travel

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 quarter 1 2018, the number of landed passengers was (unavailable), compared with 1,108 in quarter 1 2017.

Table 6.1.1 Cruise passenger numbers

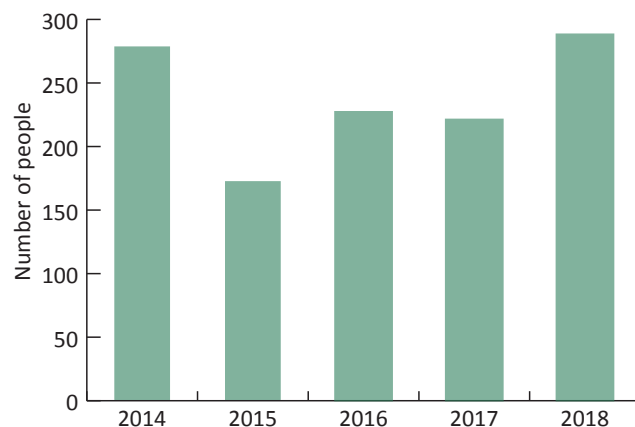|	Q1
2014	268
2015	342
2016	0
2017	1,108
2018	u/a

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 2018, the number of yachtsmen was 286, compared with 219 in Q1 2017.

Figure 6.2.1 Visiting yachtsmen

Table 6.2.1 Visiting yachtsmen

	Q1
2014	277
2015	171
2016	225
2017	219
2018	286

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.

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 2018 a total of 4,774 interviews were completed, which represented 8,485 passengers. This is 9.6% of the total number of passengers departing Guernsey during Q1 2018 (excluding inter-Bailiwick travel).

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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