

Guernsey Travel Survey

Quarter 3 2019

Issue date October 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

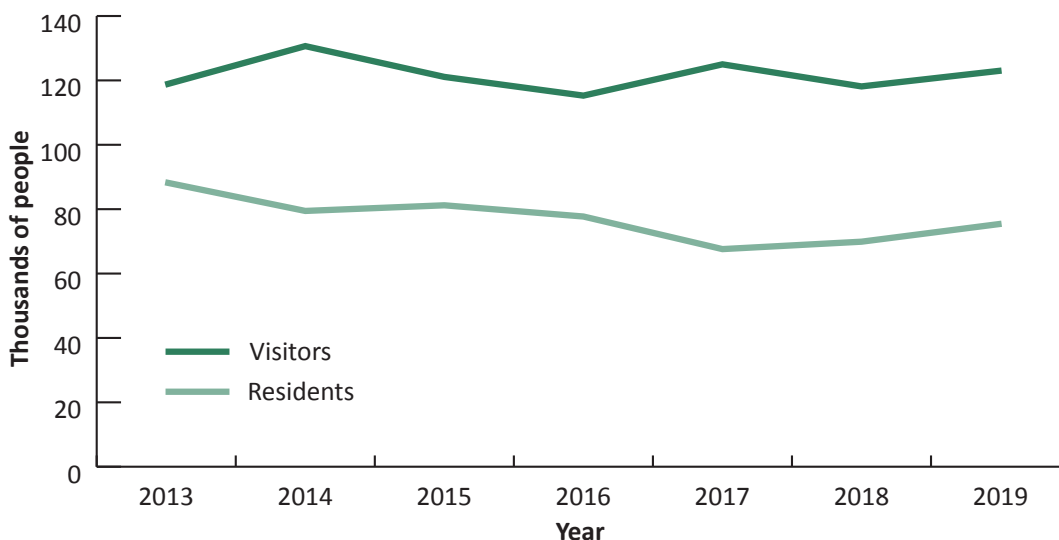
The Guernsey Travel Survey is based upon exit surveys undertaken at the airport and harbour, with the findings applied to the actual numbers of passengers (provided by the airport and harbour authorities). The methodology is more fully explained in [section 7.1](#) on [page 20](#). The purpose of these 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 Q3 2019

- The total number of departing passengers (both visitors and residents), not including cruise or yacht passengers, for Q3 2019 was 198,444, an increase of 6% when compared with Q3 2018.
- The total number of departing visitors (including cruise and yacht passengers) decreased by 5% from Q3 2018 to Q3 2019.
- The total number of departing visitors, not including cruise and yacht passengers, for Q3 2019 was 123,012. The total number of departing residents was 75,432 in Q3 2019.
- 7% of visitors stayed for business purposes, 16% were visiting friends or relatives, 57% 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 Q3 2019 was 5.17 nights.
- 65% of visitors during Q3 2019 were from the UK, 13% from France, 5% from Jersey and the remainder from elsewhere.

Figure 1.2.1 Q2 departing passenger numbers



1.3 Summary for Q3 2019

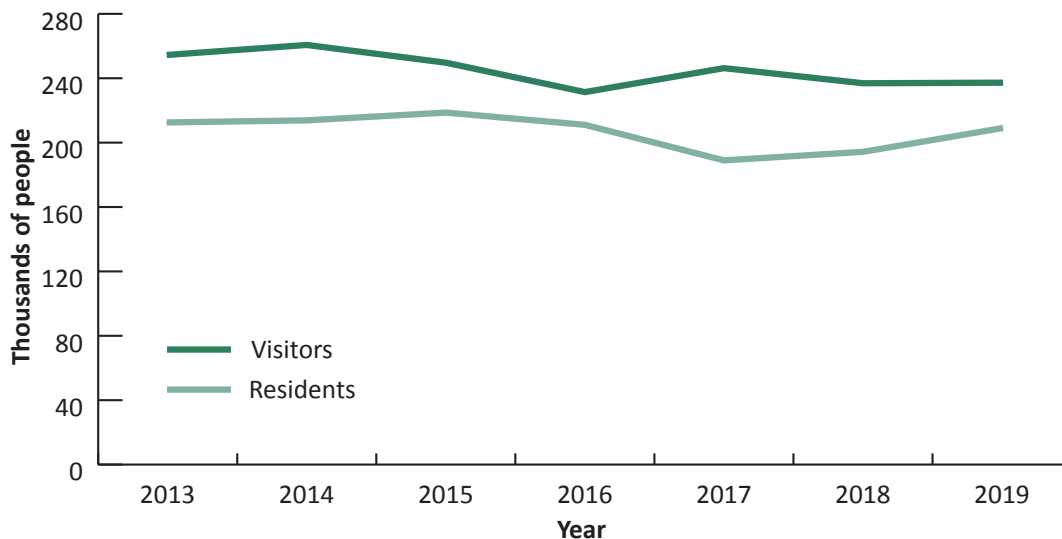
Table 1.3.1 Summary of Q3 2019 results compared with Q3 2018

	Q3 2018	Q3 2019	% change
Total departing visitors (incl. cruise & yacht)	194,174	184,009	-5
Total departing visitors (excl. cruise & yacht)	118,130	123,012	+4
Total departing residents	69,900	75,432	+8
Total departing passengers (incl. cruise & yacht)	264,074	259,441	-2
Total departing passengers (excl. cruise & yacht)	188,030	198,444	+6
Total returning visitors	462	926	+100
Total passengers (incl. cruise & yacht)	264,536	260,367	-2
Total passengers (excl. cruise & yacht)	188,492	199,370	+6
Departing visitors by air	69,843	67,712	-3
Departing visitors by sea	48,287	55,300	+15
Visitors staying for leisure purposes	67,474	70,060	+4
Visitors staying with friends / relatives	20,225	19,252	-5
Visitors staying for business purposes	8,674	8,917	+3
Visitors staying for other/unknown purposes	3,515	2,277	-35
Total staying visitors (excluding long stay)	99,888	100,506	+1
Long stay visitors	578	738	+28
Average length of stay (excluding long stay)	5.01	5.17	+3
Total number of bed nights	500,475	519,137	+4
Total staying in commercial accommodation	79,818	81,915	+3
Average stay in commercial accommodation	4.81	4.83	<1
Bed nights in commercial accommodation	384,235	395,708	+3
Day visitors for leisure purposes	8,522	14,495	+70
Day visitors with friends / relatives	346	543	+57
Day visitors for business purposes	3,375	3,261	-3
Day visitors for other/unknown purposes	5,421	3,469	-36
Total day visitors	17,664	21,768	+23
Visitors from the UK	84,334	79,802	-5
Visitors from France	8,161	15,838	+94
Visitors from Jersey	6,823	6,201	-9
Visitors from elsewhere	18,809	21,175	+13
Cruise ship passengers	64,681	50,721	-22
Visiting yachtsmen	11,363	10,276	-10
Departing Guernsey residents by air	48,395	60,361	+25
Departing Guernsey residents by sea	21,505	15,071	-30
Net Promoter Score	60.9	68.6	+13

1.2 Headlines for January to September 2019

- The total number of departing passengers (both visitors and residents), not including cruise or yacht passengers, for January to September 2019 was 446,245, 4% higher than for January to September 2018.
- The total number of departing visitors (including cruise and yacht passengers) decreased by 1% from January to September 2018 to the same period in 2019.
- The total number of departing visitors, not including cruise and yacht passengers, for January to September 2019 was 237,244. The total number of departing residents was 209,000 in January to September 2019.
- Of the 237,244 departing visitors in January to September 2019, 61% travelled by air and 39% by sea.
- 10% of visitors stayed for business purposes, 18% were visiting friends or relatives, 52% 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 January to September 2019 was 4.79 nights.
- 65% of visitors during January to September 2019 were from the UK, 12% from France, 7% from Jersey and the remainder from elsewhere.

Figure 1.2.1 Q2 departing passenger numbers



1.3 Summary for January to September 2019

Table 1.3.1 Summary of Jan to Sept 2019 results compared with Jan to Sept 2018

	Jan to Sept 2018	Jan to Sept 2019	% change
Total departing visitors (incl. cruise & yacht)	372,796	368,847	-1
Total departing visitors (excl. cruise & yacht)	236,894	237,244	<1
Total departing residents	194,286	209,000	+8
Total departing passengers (incl. cruise & yacht)	567,082	577,848	+2
Total departing passengers (excl. cruise & yacht)	431,180	446,245	+4
Total returning visitors	1,509	2,154	+43
Total passengers (incl. cruise & yacht)	568,591	580,002	+2
Total passengers (excl. cruise & yacht)	432,689	448,399	+4
Departing visitors by air	148,820	144,058	-3
Departing visitors by sea	88,074	93,187	+6
Visitors staying for leisure purposes	120,366	122,993	+2
Visitors staying with friends / relatives	42,725	42,171	-1
Visitors staying for business purposes	26,040	24,375	-6
Visitors staying for other/unknown purposes	6,215	4,299	-31
Total staying visitors (excluding long stay)	195,346	193,837	-1
Long stay visitors	1,554	1,581	+2
Average length of stay (excluding long stay)	4.76	4.79	+1
Total number of bed nights	930,205	928,177	<1
Total staying in commercial accommodation	154,821	154,304	<1
Average stay in commercial accommodation	4.47	4.43	-1
Bed nights in commercial accommodation	691,679	683,690	-1
Day visitors for leisure purposes	20,710	25,419	+23
Day visitors with friends / relatives	802	1,104	+38
Day visitors for business purposes	9,331	9,495	+2
Day visitors for other/unknown purposes	9,151	5,810	-37
Total day visitors	39,994	41,827	+5
Visitors from the UK	167,511	153,709	-8
Visitors from France	18,948	27,798	+47
Visitors from Jersey	16,011	16,498	+3
Visitors from elsewhere	34,416	39,243	+14
Cruise ship passengers	117,747	115,085	-2
Visiting yachtsmen	18,155	16,518	-9
Departing Guernsey residents by air	146,493	169,222	+16
Departing Guernsey residents by sea	47,794	39,779	-17
Net Promoter Score	57.0	61.1	+7

2.1 Total departing passengers Q3

Table 2.1.1 Q3 total departing passengers by mode of transport

Year	Number by air	Number by sea
2015	122,319	79,971
2016	120,807	72,183
2017	119,134	73,450
2018	118,238	69,792
2019	128,074	70,370

As shown in **Table 2.1.1**, in Q3 2019 there were 128,074 departing passengers by air and 70,370 by sea. This represents an 8% increase in air passenger numbers and a 1% increase in sea passengers since Q3 2018.

Table 2.1.2 Q3 total departing passengers by air and by type

	Number of Visitors	Number of Residents
2015	66,841	55,478
2016	70,265	50,542
2017	68,902	50,232
2018	69,843	48,395
2019	67,712	60,361

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 Q3 total departing passengers by sea and by type

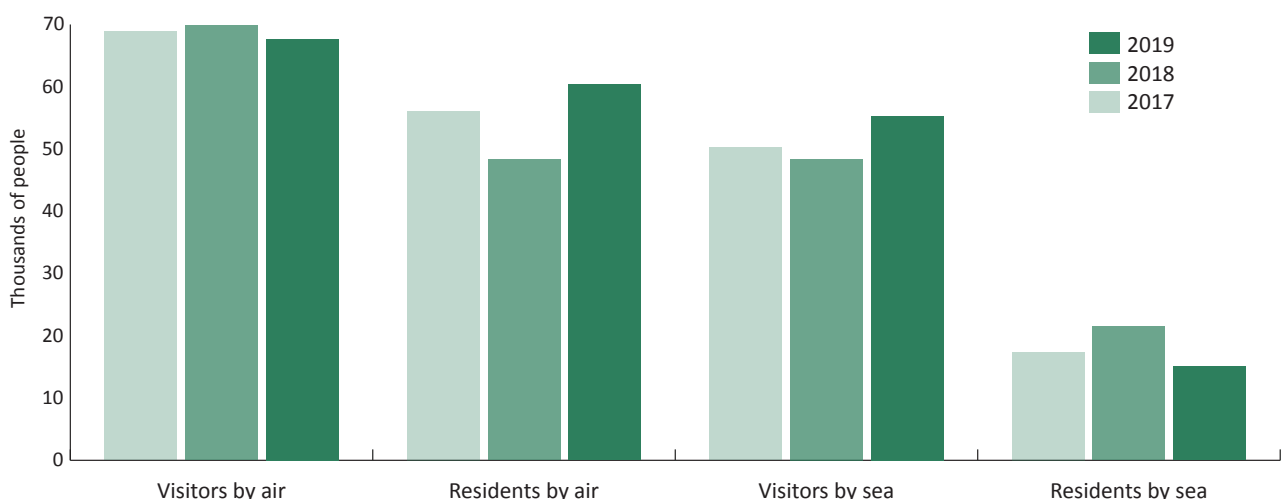
	Number of Visitors	Number of Residents
2015	54,244	25,727
2016	45,006	27,177
2017	56,087	17,363
2018	48,287	21,505
2019	55,300	15,071

Table 2.1.4 shows the percentages of departing visitors, returning visitors and residents during Q3.

Table 2.1.4 Q3 total departing passengers by type of passenger

	Number of passengers	% departing visitors	% returning visitors	% residents
2015	202,443	59.8	0.1	40.1
2016	193,584	59.5	0.3	40.1
2017	193,111	64.7	0.3	35.0
2018	188,492	62.7	0.2	37.1
2019	199,370	61.7	0.5	37.8

Figure 2.1.1 Q3 total departing passengers by type and by mode of transport



2.2 Total departing passengers January to September

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

Year	Number by air	Number by sea
2015	311,923	156,416
2016	309,811	132,648
2017	296,583	138,673
2018	295,313	135,868
2019	313,279	132,965

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

	Number of Visitors	Number of Residents
2015	149,692	162,231
2016	150,762	159,049
2017	149,634	146,949
2018	148,820	146,493
2019	144,058	169,222

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

	Number of Visitors	Number of Residents
2015	99,978	56,438
2016	80,629	52,019
2017	96,640	42,033
2018	88,074	47,794
2019	93,187	39,779

As shown in **Table 2.2.1**, in January to September 2019 there were 313,279 departing passengers by air and 132,965 by sea (these figures include returning visitors). This represents a 6% increase in air passenger numbers and a 2% decrease in sea passengers since the same period in 2018.

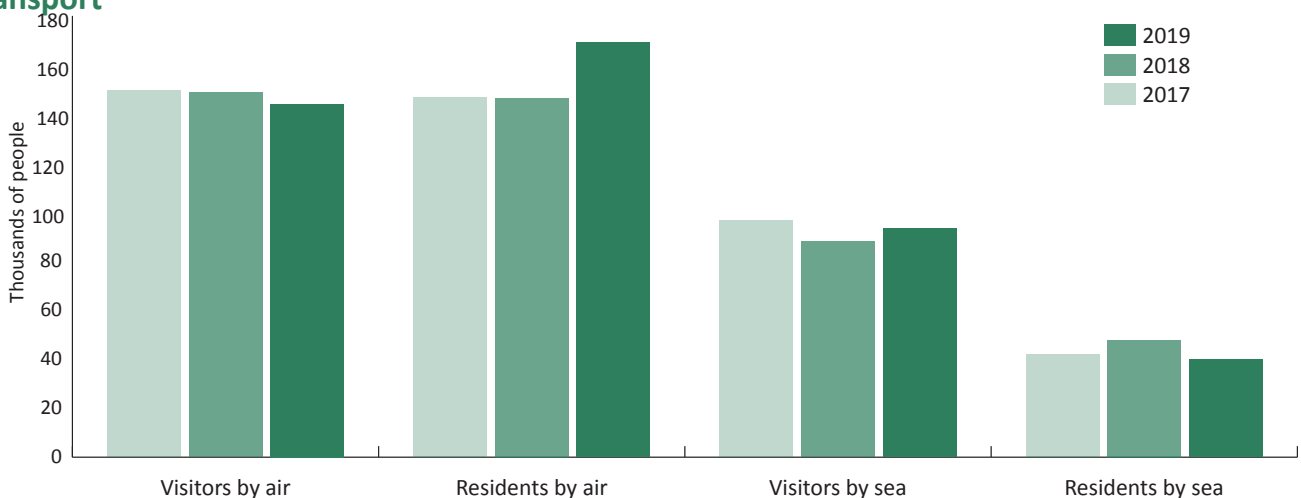
Tables 2.2.2 and **2.2.3** show the number of departing residents and departing visitors by mode of transport (except those visitors who were returning to Guernsey after, for example, a day trip elsewhere).

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

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

	Number of passengers	% departing visitors	% returning visitors	% residents
2015	468,922	53	0.1	47
2016	443,699	52	0.3	48
2017	436,457	56	0.3	43
2018	432,690	55	0.3	45
2019	448,399	53	0.5	47

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



2.3 Departing visitors Q3 - by purpose of visit

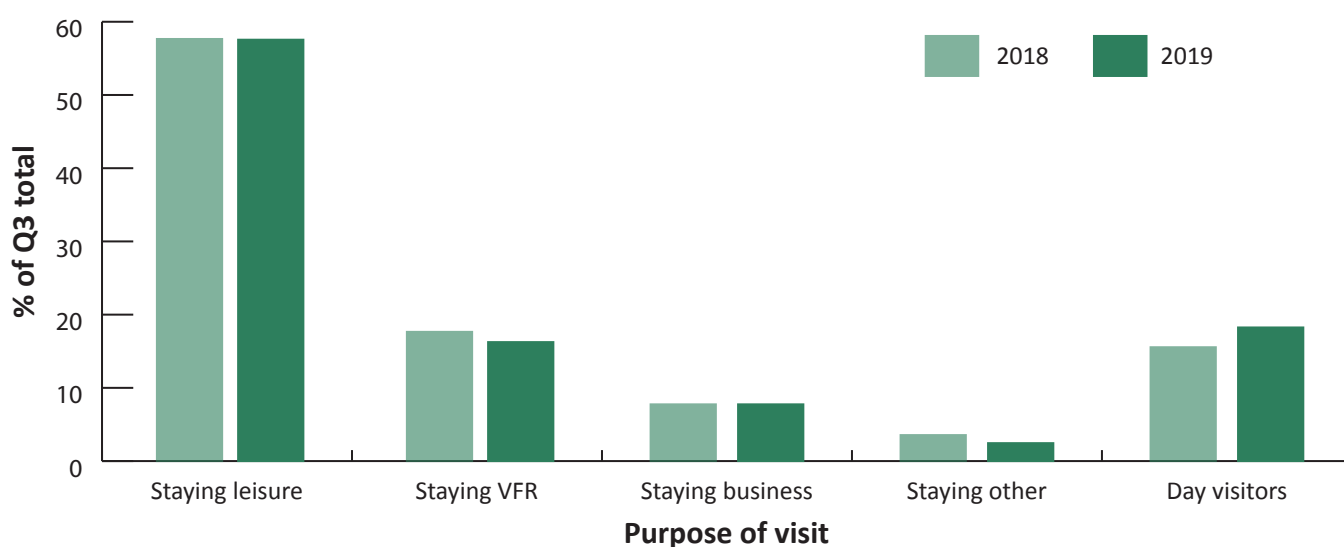
Table 2.3.1 shows the number of departing visitors during Q3 2019 broken down by purpose of visit. In Q3 2019 the highest proportion of visitors were staying leisure visitors (55%), followed by people visiting friends or family (16%). In Q3 2018 the respective percentages were 52% and 16%.

The total number of day visitors during Q2 was 21,768 in 2019, 18% of total visitors. The equivalent figure in Q3 2018 was 17,664, which was 15% of the total visitors for that period.

Table 2.3.1 Q3 departing visitors by purpose of visit

Purpose	2018		2019	
	Number	%	Number	%
Staying leisure	67,474	57	70,060	57
Visiting friends / relatives	20,225	17	19,252	16
Staying business	8,674	7	8,917	7
Staying other / unknown	3,515	3	2,277	2
Day visit leisure	8,522	7	14,495	12
Day visit friends / relatives	346	<1	543	<1
Day visit business	3,375	3	3,261	3
Day visit other / unknown	5,421	5	3,469	3
Long stay visitors	578	1	738	1
TOTAL	118,130	100	123,012	100

Figure 2.3.1 Q3 departing visitors by purpose of visit



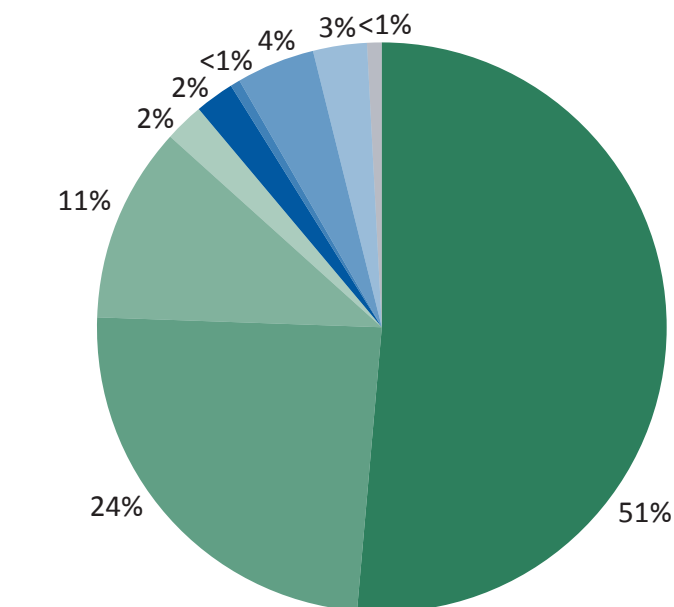
2.3 Departing visitors Q3 - by purpose of visit (continued)

Table 2.3.2 shows the number of departing visitors during Q3 2019 broken down by mode of transport and purpose of visit. In Q3 2019 the highest proportion of visitors both by air and by sea were staying leisure visitors.

Table 2.3.2 Q3 departing visitors by mode of transport and purpose of visit

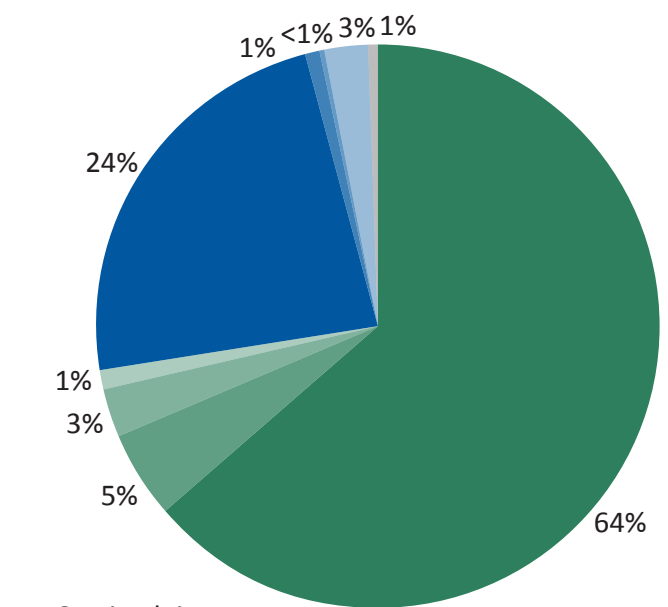
Purpose	By air	By sea
Staying leisure	34,805	35,254
Visiting friends / relatives	16,483	2,769
Staying business	7,410	1,507
Staying other/unknown	1,668	609
Day visit leisure	1,487	13,008
Day visit friends / relatives	226	317
Day visit business	3,042	219
Day other/unknown	2,077	1,392
Long stay visitors	513	225
TOTAL	67,712	55,300

Figure 2.3.2 Q3 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

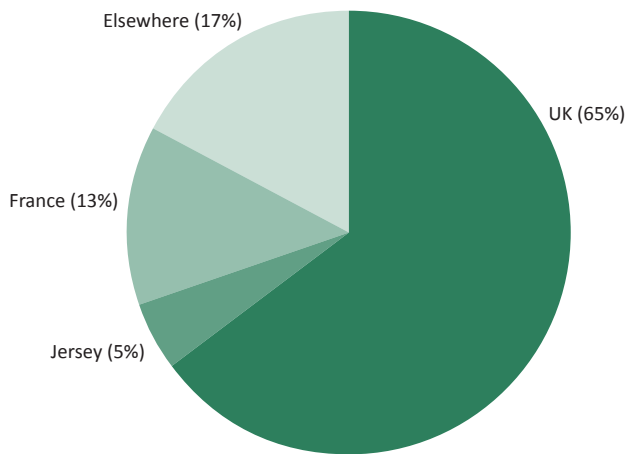
Figure 2.3.3 Q3 2019 departing visitors by sea - purpose of visit



- 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 Q3 - by country of residence

Figure 2.4.1 Q3 2019 departing visitors by country of residence



The majority of visitors during Q3 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 (5%), the Netherlands (3%) and Australia (2%).

Table 2.4.1 Q3 percentage of departing visitors by country of residence

	UK	Jersey	France	Elsewhere
2015	73	7	7	13
2016	72	5	10	13
2017	70	5	11	14
2018	71	6	7	16
2019	65	5	13	17

2.5 Departing visitors Q3 - by accommodation and length of stay

Table 2.5.1 Q3 2019 departing visitors by type of accommodation

	2019	% of total
Hotel	60,909	61
Guest accom.	3,535	4
Self catering	9,231	9
Camping	4,343	4
Friends/relatives	18,592	19
Other	3,896	4

More people stayed in hotel accommodation than in any other type of accommodation in Q3 2019 (61%) (Table 2.5.1).

The overall average length of stay was 5.17 nights in Q3 2019.

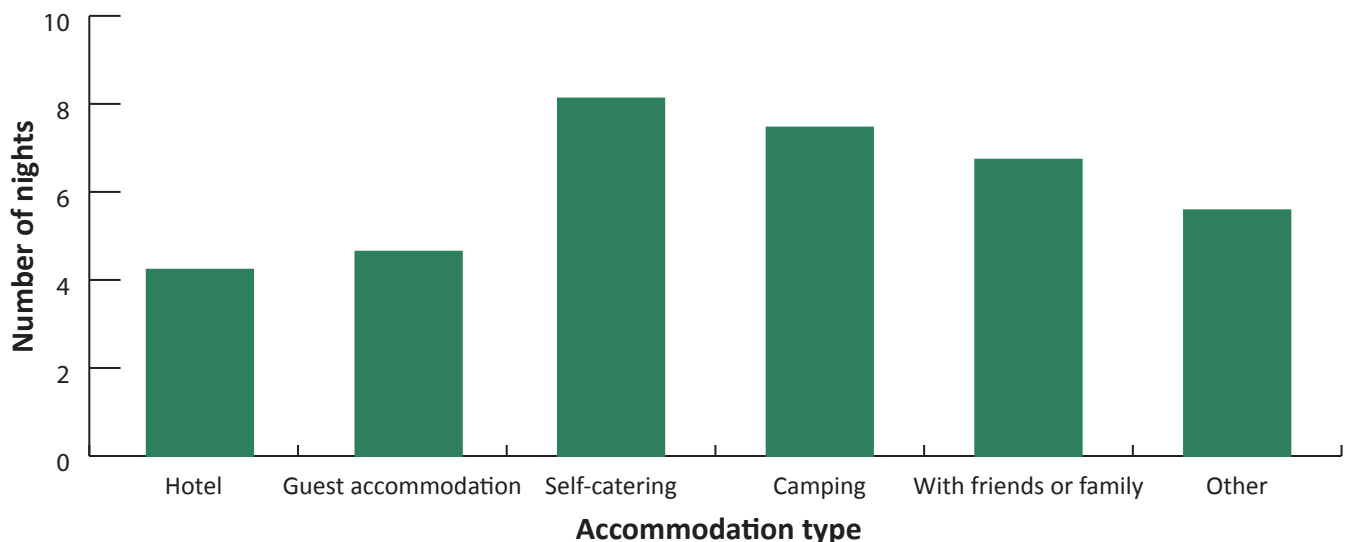
In total there were 519,137 overnight stays in Q3 2019, of which 395,708 were in commercial accommodation.

Table 2.5.2 Q3 2019 average length of stay (number of nights)

	Average length of stay
2015	5.50
2016	5.41
2017	5.29
2018	5.01
2019	5.17

In Q3 2018 these figures were 500,475 and 384,235, giving increases of 4% and 3% respectively.

Figure 2.5.1 Average length of stay by accommodation type Q3 2019



2.6 Departing visitors Q3 - day visitors

Table 2.6.1 Q3 day visitors as percentage of total departing visitors

	Departing day visitors	Total departing visitors	Day visitors as % total departing visitors
2015	27,251	121,085	23
2016	19,208	115,271	17
2017	24,155	124,989	19
2018	17,665	118,130	15
2019	21,768	123,012	18

The majority of departing visitors on a day trip were travelling by sea (69% in Q3 2019).

As a percentage of overall departing visitors, day visitors comprised 18% of the total (**Table 2.6.1**).

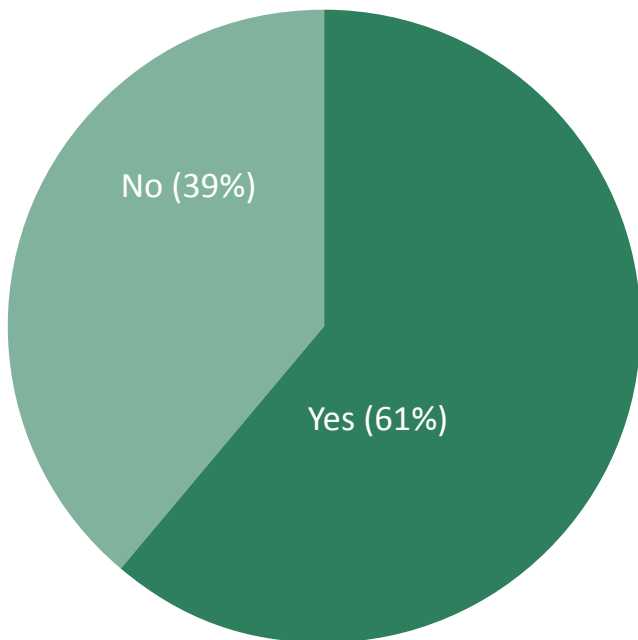
Table 2.6.2 shows that 67% of day visits were for leisure purposes, and 15% for business purposes.

Table 2.6.2 Q3 day visitors

	2019	
	Number	%
Day visit leisure	14,495	67
Day visit friends / relatives	543	3
Day visit business	3,261	15
Day visit other	3,469	16
Total day visitors	21,768	100

2.7 Previous visits to Guernsey - Q3 2019

Figure 2.7.1 Q3 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.

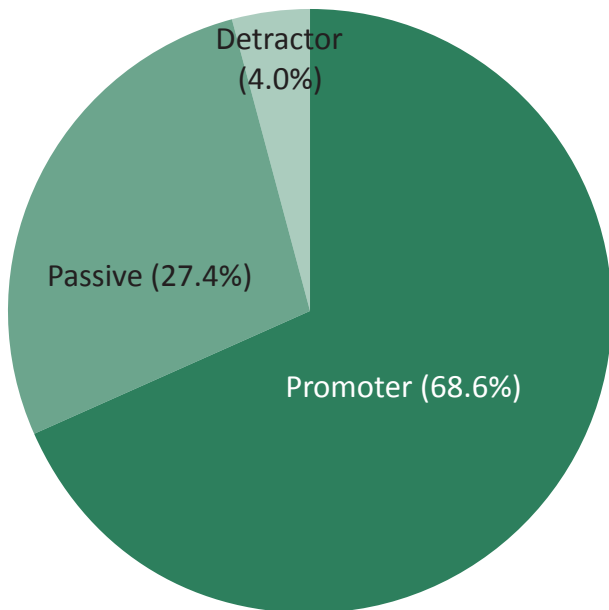
In Q3 2019, 61% of all visitors had been to Guernsey previously.

For those visiting by air, 68% had been before and for those travelling by sea, 46%.

Of those who had visited previously, 3.0% had visited on a cruise ship.

3.1 Recommendations of Guernsey - Q3 2019

Figure 3.1.1 Q3 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 Q3 2019 the NPS was 64.6. This compares with 60.9 in Q3 2018.

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

Table 3.1.1 Q3 2019 number of promoters, passives and detractors

	2019	
	Number	as %
Promoters	3,369	68.6
Passives	1,345	27.4
Detractors	197	4.0
Net Promoter Score		64.6

4.1 Departing residents - Q3

Table 4.1.1 Q2 departing residents

	Total number	as % of total departing passengers
2015	81,205	40
2016	77,719	40
2017	67,595	35
2018	69,900	37
2019	75,432	38

The number of departing residents was 75,432 in Q3 2019.

The majority of departing residents travelled by air (81%) as can be seen in **Table 4.1.2**.

Table 4.1.2 Q2 departing residents by mode of transport

	by air	by sea
2015	55,478	25,727
2016	50,542	27,177
2017	50,232	17,363
2018	48,395	21,505
2019	60,361	15,071

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 Q3 2019, 20% of all passengers were flying on to another airport. 15,973 Guernsey residents (26% of total) and 9,042 departing visitors (13% of total) were flying onwards in the third quarter of 2019.

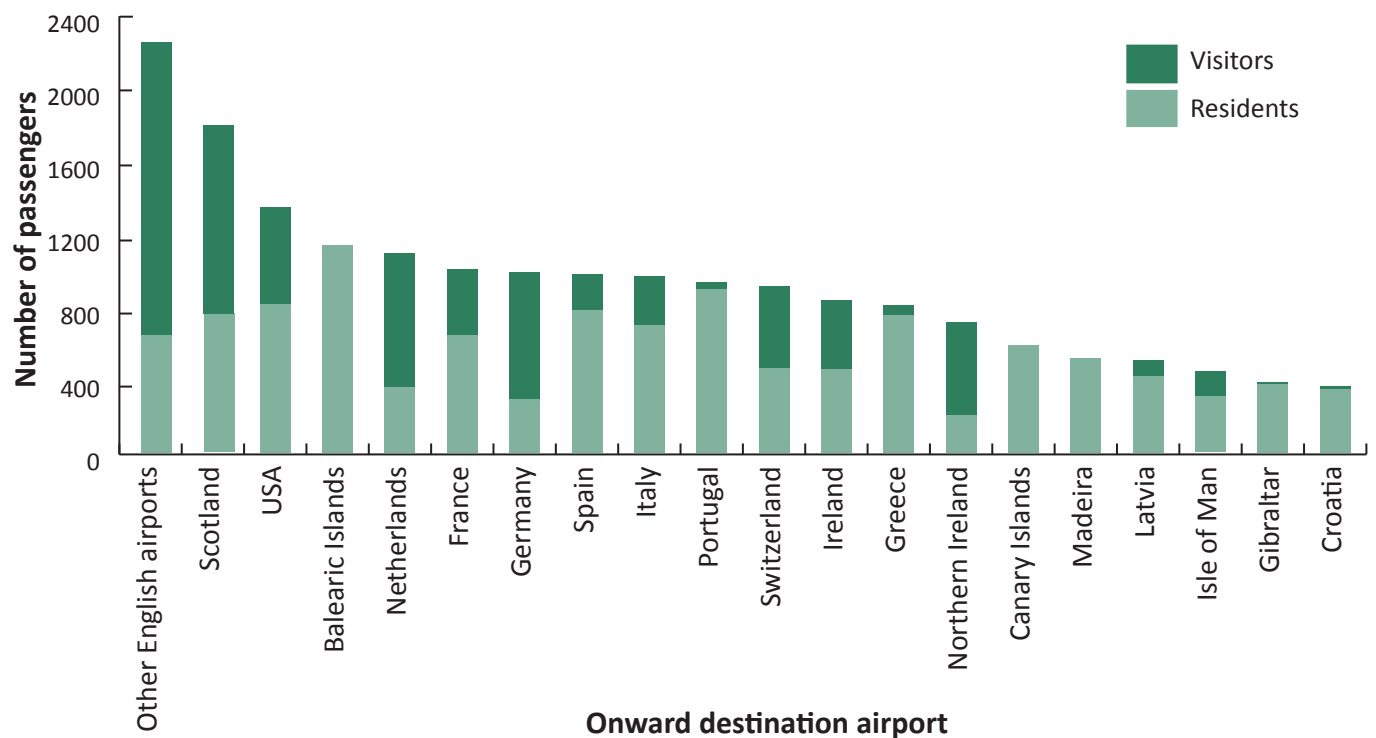
Table 5.1.1 Q3 Onward flights

Initial destination airport	Visitor departures	Visitors travelling onward	Resident departures	Residents travelling onward
Birmingham	2,168	114	1,394	279
Bristol	2,759	40	1,169	151
East Midlands	2,750	-	779	22
Exeter	2,882	242	1,410	106
Gatwick	16,859	3,299	24,850	10,943
Manchester	6,226	71	3,381	402
Southampton	13,028	2,353	12,101	1,680
Stansted	3,051	457	1,315	390
Heathrow	3,340	963	1,828	943
Southend	3,027	168	707	153
Other UK airports	3,366	27	1,127	172
Jersey	6,473	1,308	10,154	730
Foreign airports	1,783	-	148	-
Total	67,712	9,042	60,362	15,973

5.1 Onward flights (continued)

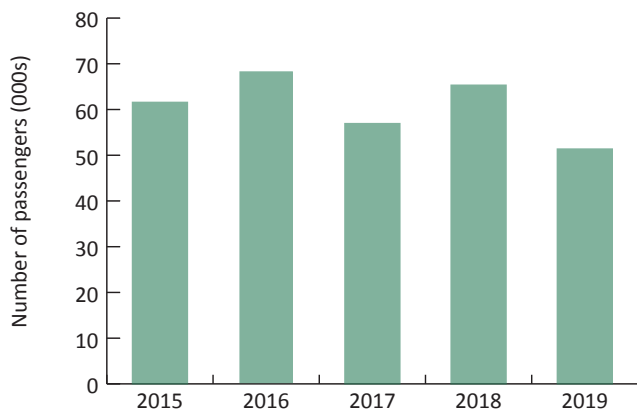
The most popular destinations for onward travel are shown in **Figure 5.1.1**. The highest number of passengers were flying on to the English airports, Scotland and the USA. The most popular destinations for departing visitors were other English airports, Scotland, the Netherlands and Germany.

Figure 5.1.1 Most popular destinations for onward travel



6.1 Cruise passengers Q3

Figure 6.1.1 Q3 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 3 2019, there were 50,721 landed passengers, compared with 64,681 during the same quarter in 2018.

Table 6.1.1 Cruise passenger numbers

	2018	2019
Q1	-	-
Q2	53,066	64,364
Q3	64,681	50,721
Q4	-	-

6.2 Visiting yachtsmen Q3

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 Q3 2019, the number of yachtsmen was 10,276, compared with 11,363 in Q3 2018.

Figure 6.2.1 Q3 Visiting yachtsmen

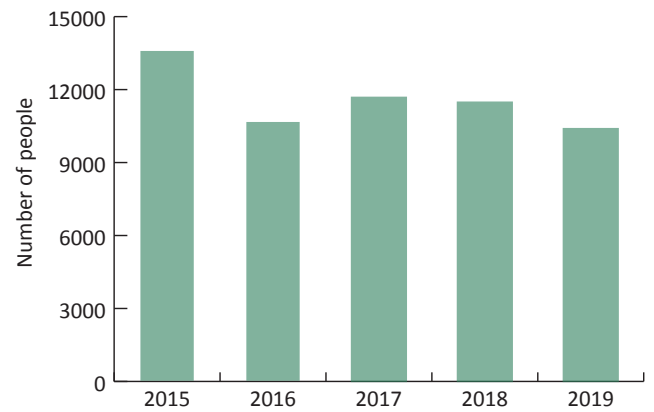


Table 6.2.1 Visiting yachtsmen

	2018	2019
Q1	286	337
Q2	6,506	5,872
Q3	11,363	10,276
Q4	541	

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 Q3 2019, 8,599 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 18,651 passengers, which is 9.4% of the total number of passengers departing Guernsey during Q3 2019 (excluding inter-Bailiwick travel).

All sample surveys are subject to a degree of statistical error. This quarter there were 8,599 interviews conducted and it was found that 62.0% of respondents were departing visitors. With a 95% confidence level, the margin of error is plus/minus 1.0% - in other words, there is a 95% probability that the proportion of departing visitors lies within the range of 61.0% to 63.0%. 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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