



Media Release

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Staying visitors increase in quarter 4 2018

Total staying visitors, the high value segment of the tourism market, increased by **+5%** in quarter 4 2018 versus the same period in 2017 (+1,810 visitors), with visitors staying for leisure purposes increasing by a healthy **+10%**.

Total departing visitors (including cruise passengers and visiting yachtsmen) stood at 44,122 visitors during the quarter, a decrease of **-2.5%**. This fall was due to a cruise ship cancellation in the quarter, caused by poor weather conditions, along with fewer visitors from yachts visiting between October and December. Conversely, total departing visitors excluding cruise passengers and visiting yachtsmen remained stable at 43,581 – with a slight increase of **+110** visitors compared with Q4 2017.

For the 2018 **full** calendar year, total visitors (including cruise ship passengers and visiting yachts) increased slightly to 420,140 (**+639 visitors**) versus January-December 2017. This was driven by a strong growth in cruise passengers of **+10%** (**+10,688** additional cruise visitors). Excluding passengers on cruise ships and visiting yachts, there were 280,475 departing visitors, a decrease of **-3%** (**-9,270 visitors**) compared with 2017. This was mainly caused by a fall in passengers travelling by ferry of **-9%** (**-8,984 visitors**) across the year, with cancellations particularly impacting the Q3 peak season period.

Quarter 4 2018 Results

Total staying visitors increased by **+5%** versus the same period in 2017, with **37,506** visitors staying for one night or more in Guernsey during the fourth quarter. Total staying visitors is composed of 15,289 visitors staying for leisure purposes (**+10%** increase during the quarter), visitors staying with friends and relatives (14,199 visitors – a **+9%** increase on Q4 2017) and visitors staying overnight for business purposes (8,017 visitors and a fall of **-8%** year on year).

Excluding cruise passengers and visiting yachtsmen, visitor numbers remained stable (**43,581** in Q4 2018 versus **43,471** in Q4 2017), but including cruise passengers and visiting yachtsmen, total visitor numbers fell by **-2.5%** from October – December 2018 (**1,119** fewer visitors than during Q4 2017).

Visitors staying in commercial accommodation, the high value segment of the market, remained stable at 24,323 – an increase of **+128** visitors and overall bed nights increased by **+2%** (**+2,549** nights). The average length of stay in commercial accommodation fell from 3.85 nights in Q4 2017 to 3.58 nights in 2018 which meant a fall in bed nights in commercial accommodation of **-7%** versus the same period in 2017.

Day visitors for business purposes increased by **+9%** but this growth was not enough to counter the sharp drop in day visitors travelling for leisure purposes (**-40%**), meaning a drop in overall day visitors during the quarter of **-21%** (-23% drop in day passengers travelling by sea and a -4% fall in those travelling by air). This equated to **1,527** fewer day visitors in 2018.

Visitors from the UK remained stable at 33,989 visitors, visitors from France increased by **+14%** during the quarter and visitors from Jersey increased by **+5%**. Visitors from elsewhere fell by **-4%**.

Visiting yachtsmen fell by **-4%** compared to 2017. There were no cruise ships during the quarter due to unfavourable weather conditions (**-1,203** fewer passengers than in Q4 2017).

Visitors travelling by air increased by **+2%** during the quarter (**+528** visitors); those travelling by ferry sea travel decreased by **-5%** (**-418** visitors).

Year to date results

Including cruise passengers and visiting yachtsmen, total visitor numbers increased slightly by **+639** visitors in January – December 2018 (420,140 compared with 419,501 in 2017). Excluding cruise passengers and visiting yachtsmen, visitor numbers were **-3%** lower than in 2017, at 280,475 visitors. This was driven by poor weather conditions earlier in the year during a very difficult Q1, along with ferry cancellations during the peak summer period which severely impacted day leisure visitor numbers, particularly from the UK (**-42%** fall) and from France (**-26%** including the St Malo route and **-43%** excluding St Malo).

Passengers travelling to Guernsey on cruise ships increased by **+10%** versus 2017, with **+10,688** additional visitors.

Following increased promotional activity focussed on the release of “The Guernsey Literary & Potato Peel Pie Society” film in Germany, the Netherlands and the US, visitors to Guernsey from “other” destinations outside of the UK, Jersey and France, increased by **+11%**. This was particularly driven by visitors travelling by air, an increase of **+217%** versus 2017, with staying leisure visitors travelling by air from these countries increasing by a combined **+197%** to 2,789 visitors in 2018 (+1537).

Overall visitors from Jersey declined by **-13%** and from the UK by **-2%** during 2018.

Total staying visitors, the high value segment of the market, remained stable at 232,852 visitors versus 2017 (2017 saw the highest level of staying leisure visitors since 2009). However, total day visitors declined by **-15%** (**-8,295** visitors) versus the previous year. This was mainly driven by a fall in leisure day visitors of **-20%**.

Visitors travelling by air remained stable in 2018. Visitors travelling by sea, however, declined by **-9%** during the year ending December 2018, with **-8,984** fewer visitors travelling by sea – this was mainly due to a fall in visitors travelling by sea from France of **-13%** and from Jersey of **-10.3%**. Visitors from the UK travelling by sea fell by **-4.9%**.

Deputy Dawn Tindall, member of the Committee *for* Economic Development said:

“Early indications for the 2019 season are positive, with tour operators claiming forward bookings are approximately 20% higher on average versus the same period last year. This they feel is likely resulting from the increased promotional activity that surrounded the release of the ‘The Guernsey

Literary and Potato Peel Pie Society” film in 2018, in both the UK and abroad. This is supported by online visitor survey findings from 2018, which demonstrated a **+12.4** percentage points increase in the proportion of visitors stating that the book/film influenced their decision to come to Guernsey compared with the 3 months prior to the release of the film (12.5% in Jan-Mar 2018 versus 24.9% in Apr to Dec 2018). This represents a period-on-period increase of **+100%** and a year-on-year increase of **+88.6%**”.

Deputy Tindall added:

“2018 proved to be a challenging year for ferry travel with multiple cancellations, from France especially and from the UK during the peak summer period impacting overall visitor numbers for the full calendar year. However, the strong increase in cruise visitor numbers helped counteract this fall and overall visitor numbers in 2018 showed a small increase over 2017.

“It is also good to see the positive signs of recovery in the last quarter of the year, with high value staying visitors showing healthy growth, along with an increase in French visitors compared with the last quarter of 2017.

“Despite the total volume of air travel (both residents **and** visitors) seeing a decline last year, it is encouraging that the volume of visitors travelling by air remained stable in 2018.

“The Open Skies policy introduced last year has clearly borne fruit with the introduction of a series of new air routes into Guernsey planned for 2019, including services from Liverpool and Southend from Flybe (Blue Islands), Bournemouth and Edinburgh from Loganair and a new seasonal service from Groningen in the Netherlands from Sunair (operated by Blue Islands).

“With a fully integrated regional television and national digital advertising campaign currently live in the UK, supported by PR, press and social media activities, plus additional promotional activity being conducted in the USA to capitalise on the release of the film on Netflix, 2019 currently looks set to be a promising year for tourism”.

Notes to Media

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