

Guernsey Travel Survey

Quarter 3 2017

Issue date October 2017

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 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.

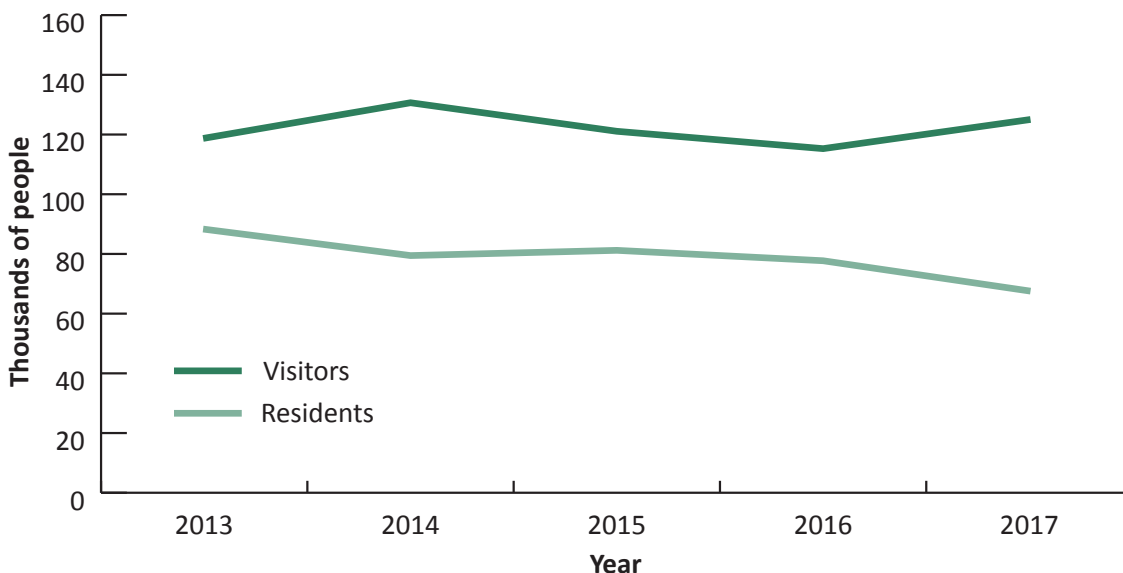
It should be noted that the figures in this report do not include inter-Bailiwick travel (Alderney, Sark and Herm). Figures have been rounded to the nearest 50 and therefore may not always add up precisely.

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 2017

- The total number of departing **passengers** (both visitors and residents) for Q3 2017 was 193,100.
- The total number of departing **visitors** for Q3 2017 was 125,000. The total number of departing **residents** was 67,600 in Q3 2017.
- Of the 125,000 departing visitors in Q3 2017, 55% travelled by air and 45% by sea.
- 8% of visitors travelled for business purposes, 15% were visiting friends or relatives, 59% 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 Q3 2017 was 5.26 nights.
- 61% of visitors during Q3 2017 were from the UK, 10% from France, 4% from Jersey and the remainder from elsewhere.

Figure 1.2.1 Q3 departing passenger numbers



1.3 Summary for Q3 2017

Table 1.3.1 Summary of Q3 2017 results compared with Q3 2016

	Q3 2016	Q3 2017	% change
Total departing visitors	115,250	125,000	+8.4
Total departing residents	77,700	67,600	-13.0
Total returning visitors	600	550	-11.3
Total departing passengers	193,600	193,100	-0.2
Departing visitors by air	70,250	68,900	-1.9
Departing visitors by sea	45,000	56,100	+24.6
Visitors staying for leisure purposes*	67,450	74,250	+10.1
Visitors staying with friends / relatives	20,550	18,250	-11.3
Visitors staying for business purposes	7,200	7,550	+5.0
Total staying visitors (excluding long stay)	95,250	100,050	+5.1
Average length of stay (excluding long stay)	5.41 nights	5.26 nights	-2.8
Total number of bed nights	515,500	559,150	+8.5
Total staying in commercial accommodation	75,200	86,700	+15.3
Average stay in commercial accommodation	5.14 nights	4.92 nights	-4.3
Bed nights in commercial accommodation	386,500	426,250	+10.3
Day visitors for leisure purposes*	15,950	20,900	+31.1
Day visitors with friends / relatives	150	350	
Day visitors for business purposes	3,150	2,900	-7.5
Total day visitors	19,200	24,150	+25.8
Visitors from the UK	82,850	87,700	+5.8
Visitors from France	11,800	13,750	+16.5
Visitors from Jersey	6,000	5,800	-3.8
Visitors from elsewhere	14,600	17,850	+22.0
Long stay visitors	850	750	-7.1
Cruise ship passengers	67,900	56,300	-17.1
Visiting yachtsmen	10,600	11,550	+9.3
Departing Guernsey residents by air	50,550	50,250	-0.6
Departing Guernsey residents by sea	27,200	17,350	-36.1
Net Promoter Score	56.9	53.0	-6.9

Note: some figures may not add up precisely due to rounding

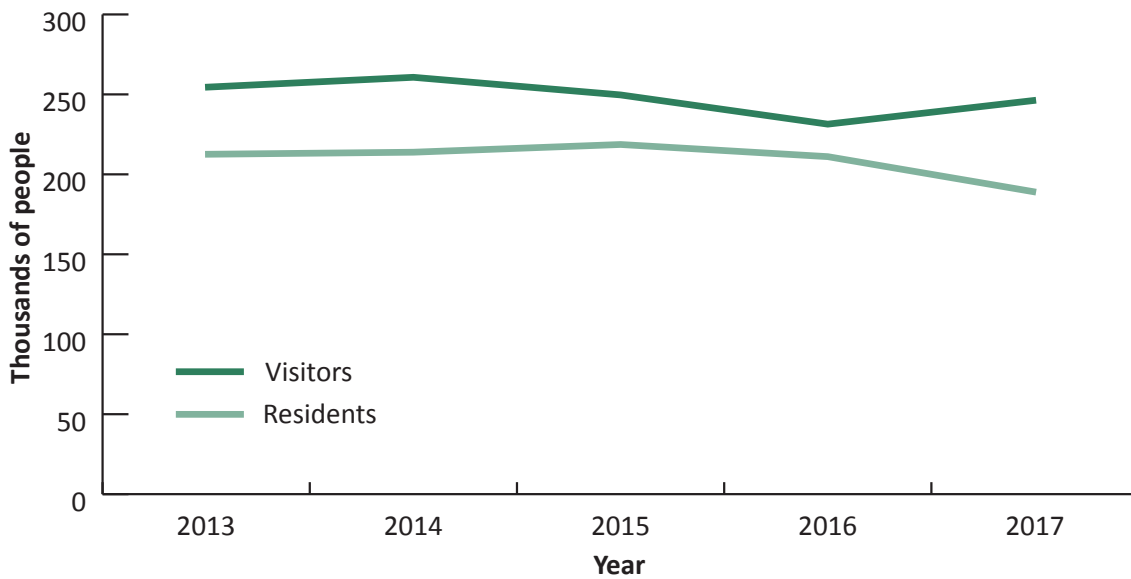
Note: whilst the figures presented in the table have been rounded to the nearest 50, the percentage changes are based on the actual, unrounded figures

*There have been methodological changes since the last quarterly report: the "leisure" category now also includes all travellers who are not travelling for business purposes or staying with friends or family.

1.4 Headlines for January to September 2017

- The total number of departing **passengers** (both visitors and residents) for January to September 2017 was 436,450.
- The total number of departing **visitors** for January to September 2017 was 246,250. The total number of departing **residents** was 189,000 in January to September 2017.
- Of the 246,250 departing visitors in January to September 2017, 61% travelled by air and 39% by sea.
- 14% of visitors travelled for business purposes, 17% were visiting friends or relatives, 54% were leisure visitors staying for at least one night and a further 15% visiting for a day trip.
- The average length of stay for those who stayed at least one night in January to September 2017 was 4.82 nights.
- 65% of visitors during January to September 2017 were from the UK, 9% from France, 7% from Jersey and the remainder from elsewhere.

Figure 1.4.1 January to September departing passenger numbers



1.5 Summary for January to September 2017

Table 1.5.1 Summary of Jan to Sept 2017 results compared with Jan to Sept 2016

	Jan to Sept 2016	Jan to Sept 2017	% change
Total departing visitors	231,400	246,250	+6.4
Total departing residents	211,050	189,000	-10.5
Total returning visitors	1,250	1,200	-3.0
Total departing passengers	443,700	436,450	-1.6
Departing visitors by air	150,750	149,650	-0.7
Departing visitors by sea	80,650	96,650	+19.9
Visitors staying for leisure purposes*	120,900	132,100	+9.3
Visitors staying with friends / relatives	44,300	41,850	-5.5
Visitors staying for business purposes	22,150	23,800	+7.3
Total staying visitors (excluding long stay)	187,350	197,750	+5.5
Average length of stay (excluding long stay)	4.85 nights	4.82 nights	-0.6
Total number of bed nights	907,900	983,750	+8.4
Total staying in commercial accommodation	146,350	162,650	+11.2
Average stay in commercial accommodation	4.54 nights	4.49 nights	-1.1
Bed nights in commercial accommodation	665,000	729,650	+9.7
Day visitors for leisure purposes*	31,750	36,100	+13.7
Day visitors with friends / relatives	450	800	
Day visitors for business purposes	10,300	9,850	-4.2
Total day visitors	42,500	46,750	+10.0
Visitors from the UK	164,200	172,600	+5.1
Visitors from France	21,200	23,850	+12.6
Visitors from Jersey	18,950	18,450	-2.5
Visitors from elsewhere	27,050	31,400	+16.1
Long stay visitors	1,550	1,800	+16.1
Cruise ship passengers	132,850	109,100	-17.9
Visiting yachtsmen	16,350	18,900	+15.8
Departing Guernsey residents by air	159,050	146,950	-7.6
Departing Guernsey residents by sea	52,000	42,050	-19.2
Net Promoter Score	52.4	51.5	-1.7

Note: some figures may not add up precisely due to rounding

Note: whilst the figures presented in the table have been rounded to the nearest 50, the percentage changes are based on the actual, unrounded figures

*There have been methodological changes since the last quarterly report: the "leisure" category now also includes all travellers who are not travelling for business purposes or staying with friends or family.

2.1 Total departing passengers Q3

Table 2.1.1 Q3 total departing passengers by mode of transport

Year	By air	By sea
	Number	Number
2016	121,250	72,350
2017	119,500	73,650

Table 2.1.2 Q3 total departing passengers by air and by type

	Visitors	Residents
	Number	Number
2016	70,250	50,550
2017	68,900	50,250

Table 2.1.3 Q3 total departing passengers by sea and by type

	Visitors	Residents
	Number	Number
2016	45,000	27,200
2017	56,100	17,350

Table 2.1.4 Q3 total departing passengers by type of passenger

	Number of passengers	% departing visitors	% returning visitors	% residents
2016	193,600	59.5	0.3	40.2
2017	193,100	64.7	0.3	35.0

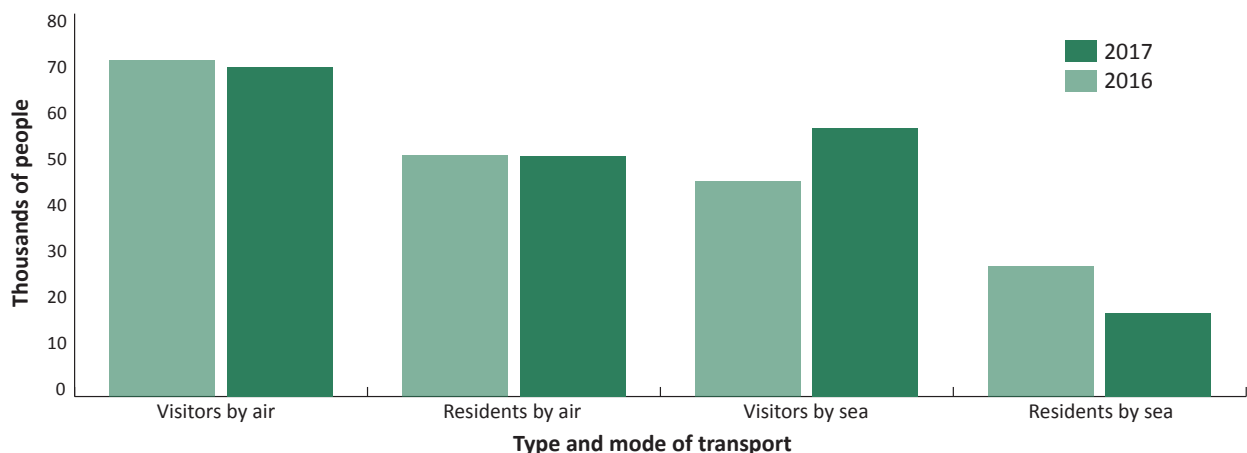
As shown in **Table 2.1.1**, in Q3 2017 there were 119,500 departing passengers by air and 73,650 by sea (these figures include returning visitors). This represents a drop of 1.5% in air passenger numbers and an increase of 1.8% in sea passengers.

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).

The numbers of departing passengers by type and mode of transport can be seen in **Figure 2.1.1**.

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

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



2.2 Total departing passengers January to September

As shown in **Table 2.2.1**, during the period from January to September 2017 there were 297,550 departing passengers by air and 138,950 by sea (these figures include returning visitors). This represents a drop of 4.3% in air passenger numbers and an increase of 4.6% in sea passengers.

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).

The numbers of departing passengers by type and mode of transport can be seen in **Figure 2.2.1**.

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

Table 2.2.1 Jan to Sept total departing passengers by mode of transport

Year	By air	By sea
	Number	Number
2016	310,850	132,850
2017	297,550	138,950

Table 2.2.2 Jan to Sept total departing passengers by air and by type

	Visitors	Residents
	Number	Number
2016	150,750	159,050
2017	149,650	146,950

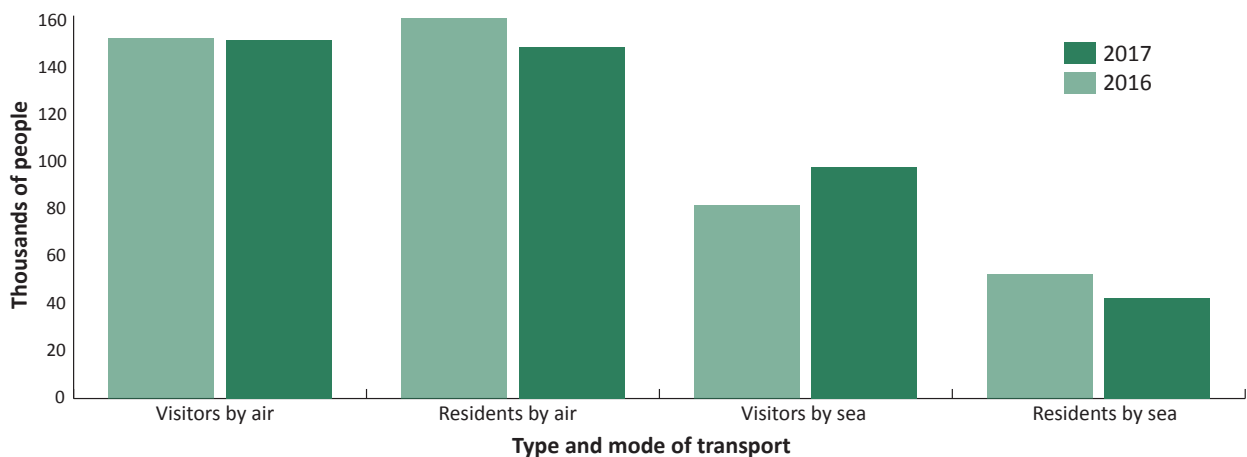
Table 2.2.3 Jan to Sept total departing passengers by sea and by type

	Visitors	Residents
	Number	Number
2016	80,650	52,000
2017	96,650	42,050

Table 2.2.4 Jan to Sept total departing passengers by type of passenger

	Number of passengers	% departing visitors	% returning visitors	% residents
2016	443,700	52.1	0.3	47.6
2017	436,450	56.4	0.3	43.3

Figure 2.2.1 Jan to Sept total departing passengers by type and by mode of transport



2.3 Departing visitors Q3 - by mode of transport

Table 2.3.1 Q3 departing visitors by air

Year	By air	
	Number	% change
2013	69,200	-2.1
2014	68,000	-1.7
2015	66,850	-1.7
2016	70,250	+5.1
2017	68,900	-1.9

As shown in **Table 2.3.1** and **Table 2.3.2**, in Q3 2017 there were 68,900 departing visitors by air and 56,100 by sea.

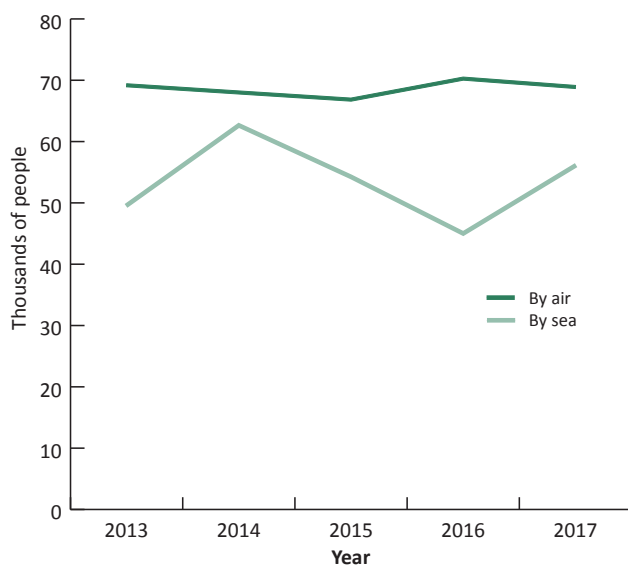
This compares with 70,250 by air and 45,000 by sea in Q3 of 2016.

Table 2.3.2 Q3 departing visitors by sea

Year	By sea	
	Number	% change
2013	49,600	-10.3
2014	62,650	+26.4
2015	54,250	-13.4
2016	45,000	-17.0
2017	56,100	+24.6

Note: whilst the figures presented in the above tables have been rounded to the nearest 50, the percentage changes are based on the actual, unrounded figures

Figure 2.3.1 Q3 departing visitors by mode of transport



2.4 Departing visitors Q3 - by purpose of visit

Table 2.4.1 shows the number of departing visitors during Q3 2017 broken down by purpose of visit. In Q3 2017 the highest proportion of visitors were staying leisure visitors (59.4%), followed by day leisure visitors (16.7%) and visitors staying with friends or relatives (VFR) (14.6%).

In Q3 2016 the respective percentages were 58.5%, 13.8% and 17.9%.

The total number of day visitors during Q3 was 24,150 in 2017, 19% of total visitors. The equivalent figure in Q3 2016 was 19,200, which was 17% of the total visitors for that period.

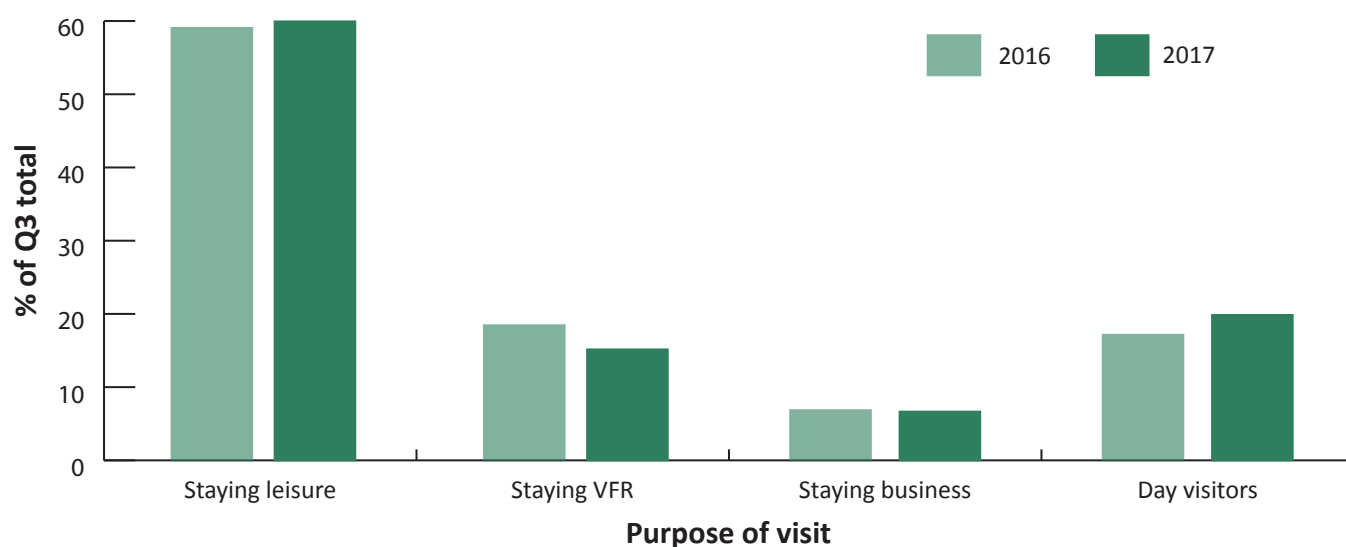
Table 2.4.1 Q3 departing visitors by purpose of visit

Purpose	2016		2017	
	Number	%	Number	%
Staying leisure*	67,450	58.5	74,250	59.4
Visiting friends / relatives	20,550	17.9	18,250	14.6
Staying business	7,200	6.3	7,550	6.1
Day visit leisure*	15,950	13.8	20,900	16.7
Day visit friends / relatives	150	0.1	350	0.3
Day visit business	3,150	2.7	2,900	2.3
Long stay visitors	850	0.7	750	0.6
TOTAL	115,250	100.0	125,000	100.0

Note: some figures may not add up precisely due to rounding

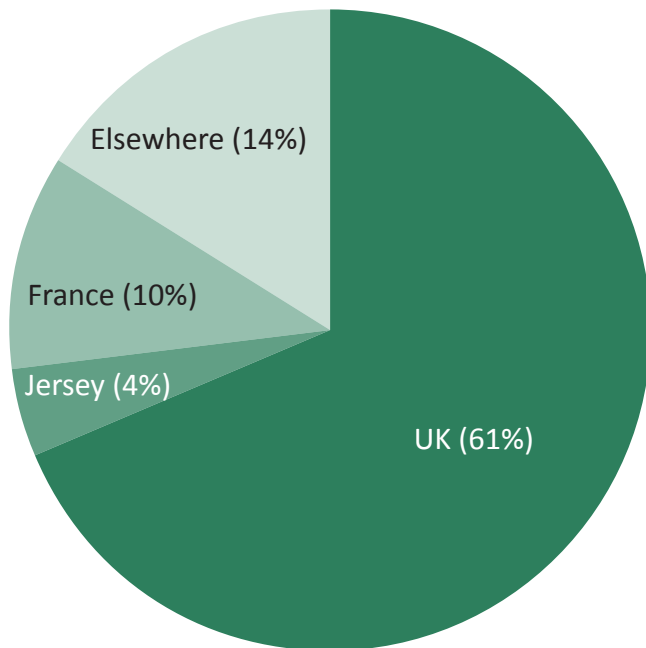
* There have been methodological changes since the last quarterly report: the "leisure" category now also includes all travellers who are not travelling for business purposes or staying with friends or family.

Figure 2.4.1 Proportions of Q3 departing visitors by purpose of visit



2.5 Departing visitors Q3 - by country of residence

Figure 2.5.1 Q3 2017 departing visitors by country of residence



The majority of visitors during Q3 2017 were from the UK, as can be seen in **Figure 2.5.1** and **Table 2.5.1**.

Within the “Elsewhere” category, 3% were from Germany, 2.2% from Holland and the remaining 9.1% from other countries.

Table 2.5.1 Q3 departing visitors by country of residence

	UK	Jersey	France	Elsewhere
2013	84,750	8,350	11,850	13,850
2014	90,400	11,300	11,400	17,550
2015	88,800	8,800	8,200	15,350
2016	82,850	6,000	11,800	14,600
2017	87,700	5,800	13,750	17,850

2.6 Departing visitors Q3 - by accommodation and length of stay

Table 2.6.1 Q3 2017 departing visitors by type of accommodation

	2017	% of total
Hotel	63,950	60.2
Guest accom.	4,550	4.3
Self catering	11,450	10.8
Camping	4,100	3.9
Friends/relatives	19,550	18.4
Other	2,650	2.5

More people stayed in hotel accommodation than in any other type of accommodation in Q3 2017 (60.2%) (Table 2.6.1).

The overall average length of stay was 5.26 nights in Q3 2017.

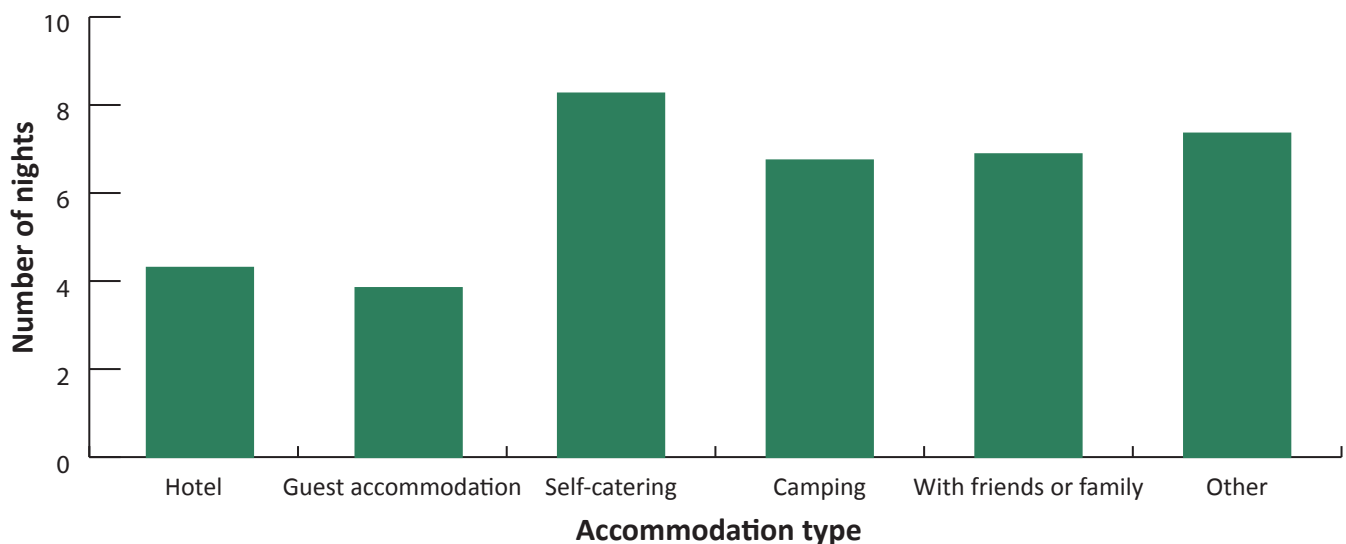
In total there were 559,150 overnight stays in Q3 2017, of which 426,250 were in commercial accommodation.

Table 2.6.2 Q3 2017 average length of stay (number of nights)

	Average length of stay
2013	5.44
2014	5.42
2015	5.50
2016	5.41
2017	5.26

In quarter 3 2016 these figures were 515,500 and 386,500, giving increases of 9% and 10% respectively.

Figure 2.6.1 Average length of stay by accommodation type Q3 2017



2.7 Departing visitors Q3 - day visitors

Table 2.7.1 Q3 day visitors as percentage of total departing visitors

	Departing day visitors	Total departing visitors	Day visitors as % total departing visitors
2013	28,600	118,750	24.1
2014	34,300	130,650	26.2
2015	27,250	121,100	22.5
2016	19,200	115,250	16.7
2017	24,150	125,000	19.3

As a percentage of overall departing visitors, day visitors comprised 19.3% of the total (**Table 2.7.1**).

Table 2.7.2 shows that 86.5% of day visits were for leisure purposes, and 12.0% for business purposes.

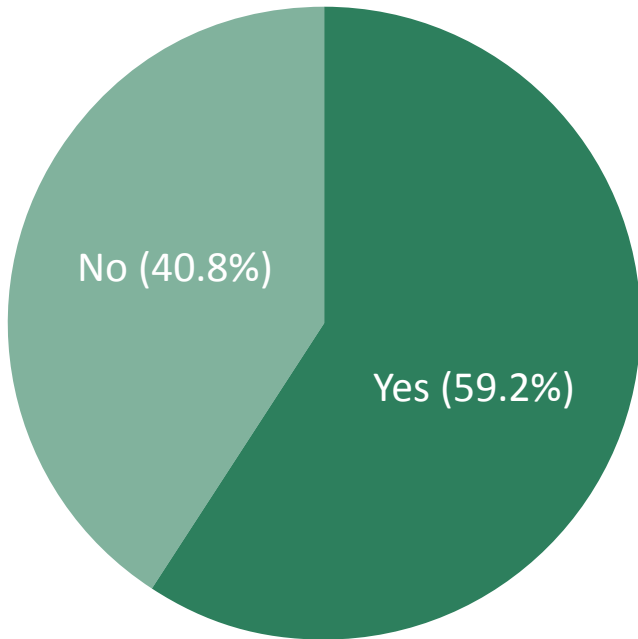
Table 2.7.2 Q3 day visitors

	2017	
	Number	%
Day visit leisure*	20,900	86.5
Day visit friends / relatives	350	1.5
Day visit business	2,900	12.0
Total day visitors	24,150	100.0

* There have been methodological changes since the last quarterly report: the "leisure" category now also includes all travellers who are not travelling for business purposes or staying with friends or family.

2.8 Previous visits to Guernsey - Q3

Figure 2.8.1 Q3 visitors who had visited Guernsey previously



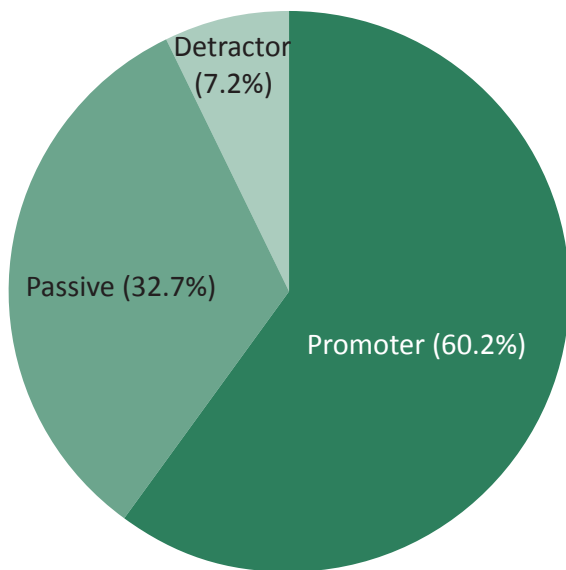
Respondents were asked if they had visited Guernsey before and, if so, had they visited on a cruise ship.

In Q3 2017 59.2% of all visitors had been to Guernsey previously.

Of those who had visited previously, 3.7% had visited on a cruise ship.

3.1 Recommendations of Guernsey - Q3

Figure 3.1.1 Q3 2017 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 2017 the NPS was 53.0.

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

Table 3.1.1 Q3 number of promoters, passives and detractors

	2017	
	Number	as %
Promoters	3,123	60.2
Passives	1,695	32.7
Detractors	372	7.2
Net Promoter Score	-	53.0

4.1 Departing residents - Q3

Table 4.1.1 Q3 departing residents

	Total number	as % of total departing passengers
2013	88,300	42.5
2014	79,450	37.7
2015	81,200	40.1
2016	77,700	40.2
2017	67,600	35.0

The number of departing residents was 67,600 in Q3 2017.

The majority of departing residents travelled by air (74.3%) as can be seen in [Table 4.1.2](#).

Table 4.1.2 Q3 departing residents by mode of transport

	by air	by sea
2013	52,750	35,550
2014	55,250	24,200
2015	55,500	25,750
2016	50,550	27,200
2017	50,250	17,350

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 24% of all passengers were flying on to another airport. 19,000 Guernsey residents (38% of total residents) and 11,850 of departing visitors (16% of total visitors) were flying onwards in the third quarter of 2017.

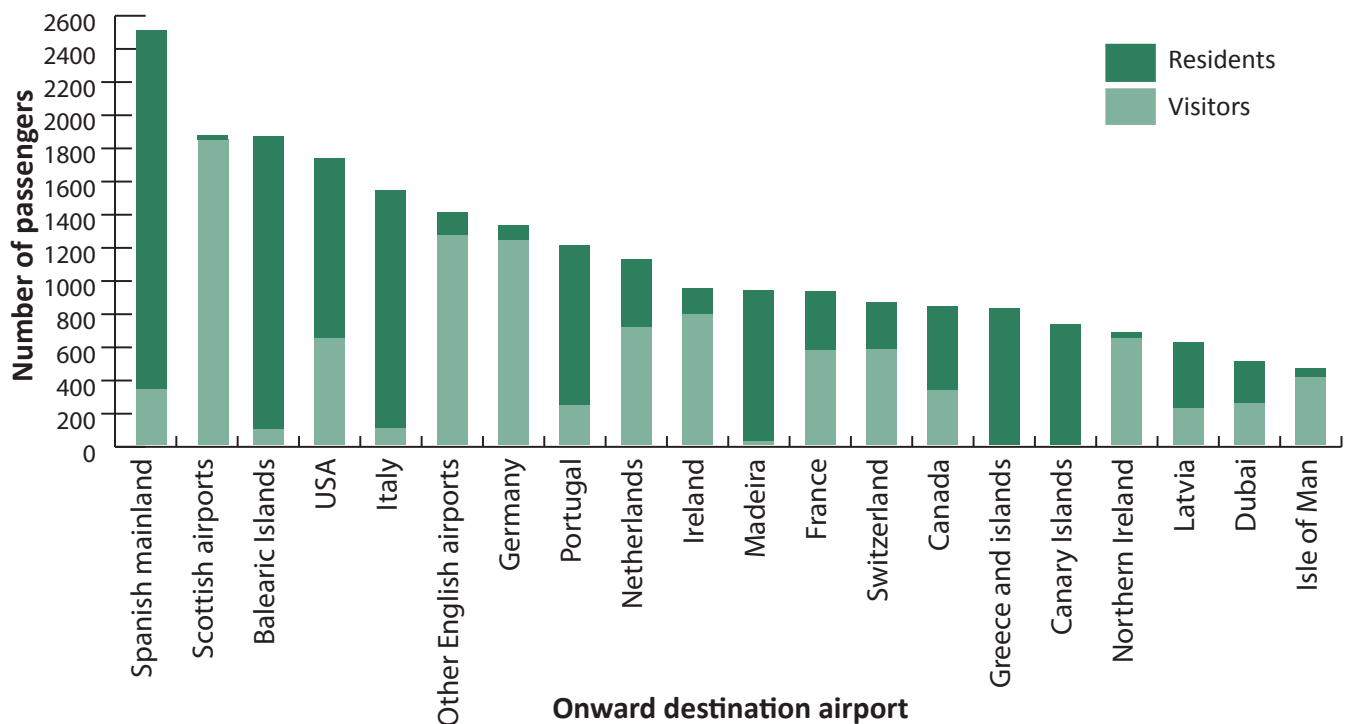
Table 5.1.1 Q3 Onwards flights

Initial destination airport	Visitor departures	Visitors travelling onward	Resident departures	Residents travelling onward
Birmingham	3,700	950	900	550
Bristol	2,950	50	1,300	-
East Midlands	4,450	-	450	50
Exeter	2,850	250	1,800	250
London City	2,600	250	1,100	100
Gatwick	20,700	4,950	25,150	15,650
Manchester	7,950	200	2,200	400
Southampton	10,750	2,700	6,850	1,250
Stansted	4,050	500	900	350
Other UK airports	3,200	150	1,000	-
Jersey	5,000	1,750	7,750	400
Foreign airports	700	-	850	-
Total	68,900	11,850	50,250	19,000

5.1 Onward flights (continued)

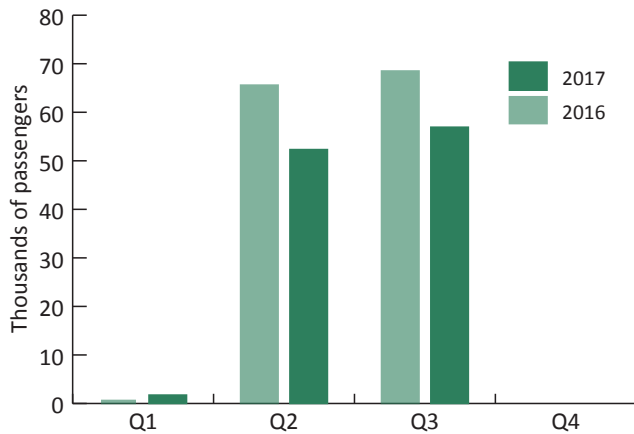
The most popular destinations for onward travel are shown in **Figure 5.1.1**. The highest number of passengers were flying on to the Spanish mainland, followed by airports in Scotland and the Balearics. The most popular destinations for departing visitors were Scotland, Germany and other English airports.

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 passengers visiting the island, depicted in **Table 6.1.1** and **Figure 6.1.1**.

In quarter 3 2017, the number of landed passengers was 56,288, compared with 67,880 in quarter 3 2016.

Table 6.1.1 Cruise passenger numbers

	2016	2017
Q1	0	1,100
Q2	64,970	51,690
Q3	67,880	56,288

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 Q3 2017, the number of yachtsmen was 11,562, compared with 10,580 in Q3 2016.

Figure 6.2.1 Visiting yachtsmen

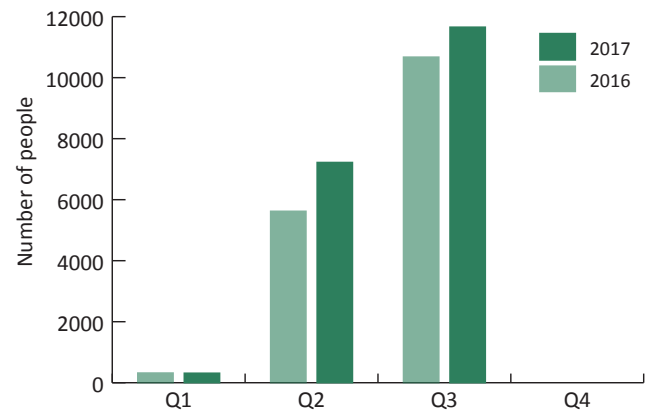


Table 6.1.1 Visiting yachtsmen

	2016	2017
Q1	225	219
Q2	5,527	7,127
Q3	10,580	11,562

7.1 Methodology

Surveys are undertaken at Guernsey's airport and harbour to determine the composition of passengers. The results are analysed and 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 final numbers are rounded to the nearest 50.

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 Q3 2017 a total of 6,662 interviews were completed, which represented 16,131 passengers. This is 8.4% of the total number of passengers departing Guernsey during Q3 2017 (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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