

Guernsey Travel Survey

Quarter 2 2018

Issue date July 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



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.

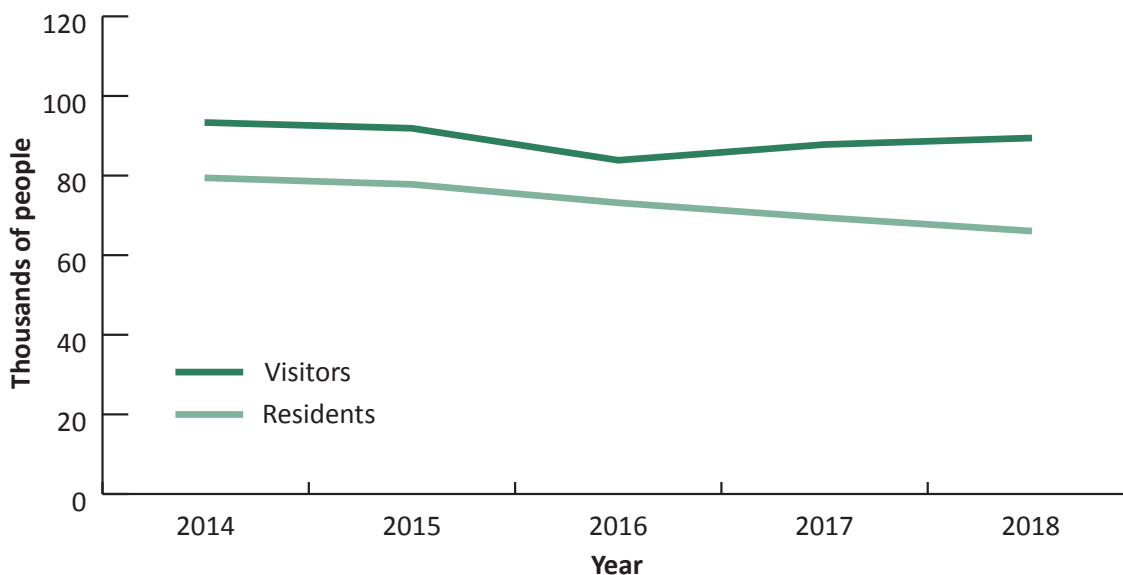
It should be noted that the figures in this report do not include inter-Bailiwick travel (Alderney, Sark and Herm).

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 Q2 2018

- The total number of departing **passengers** (both visitors and residents) for Q2 2018 was 155,505.
- The total number of departing **visitors** for Q2 2018 was 89,434. The total number of departing **residents** was 66,071 in Q2 2018.
- Of the 89,434 departing visitors in Q2 2018, 60% travelled by air and 40% by sea.
- 11% of visitors travelled for business purposes, 16% were visiting friends or relatives, 54% were leisure visitors staying for at least one night and a further 19% visiting for a day trip.
- The average length of stay for those who stayed at least one night in Q2 2018 was 4.52 nights.
- 70% of visitors during Q2 2018 were from the UK, 11% from France, 6% from Jersey and the remainder from elsewhere.

Figure 1.2.1 Q2 departing passenger numbers



1.3 Summary for Q2 2018

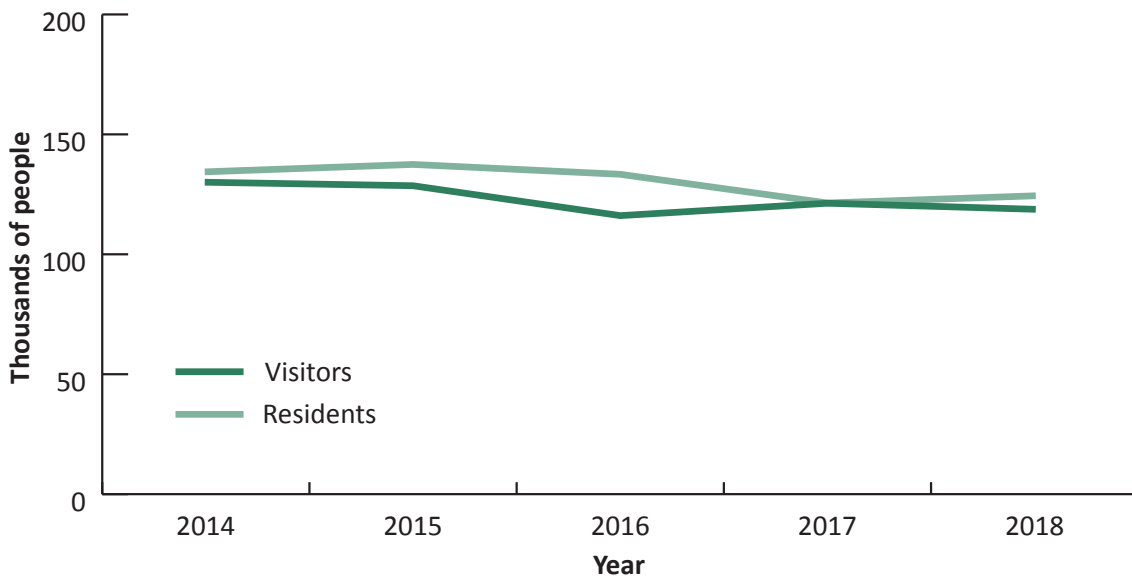
Table 1.3.1 Summary of Q2 2018 results compared with Q2 2017

	Q2 2017	Q2 2018	% change
Total departing visitors	87,801	89,434	+2
Total departing residents	69,433	66,071	-5
Total departing passengers	157,234	155,505	-1
Departing visitors by air	51,927	53,977	+4
Departing visitors by sea	35,874	35,457	-1
Visitors staying for leisure purposes	48,855	48,647	<1
Visitors staying with friends / relatives	14,809	13,947	-6
Visitors staying for business purposes	7,548	9,542	+26
Total staying visitors (excluding long stay)	71,212	72,136	+1
Average length of stay (excluding long stay)	4.44 nights	4.52 nights	+2
Total number of bed nights	316,529	326,289	+3
Total staying in commercial accommodation	58,054	59,951	+3
Bed nights in commercial accommodation	246,892	260,213	+5
Average stay in commercial accommodation	4.25 nights	4.34 nights	+2
Day visitors for leisure purposes	13,116	13,984	+7
Day visitors with friends / relatives	297	226	-43
Day visitors for business purposes	2,758	2,773	+1
Total day visitors	16,171	16,984	+5
Visitors from the UK	59,716	62,610	+5
Visitors from France	9,491	9,737	+3
Visitors from Jersey	7,675	5,005	-35
Visitors from elsewhere	10,914	12,078	+11
Long stay visitors	419	315	-25
Cruise ship passengers	51,689	53,066	+3
Visiting yachtsmen	7,127	6,114	-14
Departing Guernsey residents by air	51,831	47,641	-8
Departing Guernsey residents by sea	17,602	18,431	+5
Net Promoter Score	56.0	57.4	+2

1.4 Headlines for January to June 2018

- The total number of departing **passengers** (both visitors and residents) for January to June 2018 was 243,150.
- The total number of departing **visitors** for January to June 2018 was 118,764. The total number of departing **residents** was 124,386 in January to June 2018.
- Of the 118,764 departing visitors in January to June 2018, 66% travelled by air and 34% by sea.
- 15% of visitors travelled for business purposes, 19% were visiting friends or relatives, 47% were leisure visitors staying for at least one night and a further 19% visiting for a day trip.
- The average length of stay for those who stayed at least one night in January to June 2018 was 4.50 nights.
- 70% of visitors during January to June 2018 were from the UK, 9% from France, 8% from Jersey and the remainder from elsewhere.

Figure 1.4.1 January to June departing passenger numbers



1.5 Summary for January to June 2018

Table 1.5.1 Summary of Jan to June 2018 results compared with Jan to June 2017

	Jan to June 2017	Jan to June 2018	% change
Total departing visitors	121,285	118,764	-2
Total departing residents	121,387	124,386	+2
Total departing passengers	242,672	243,150	<1
Departing visitors by air	80,732	78,977	-2
Departing visitors by sea	40,553	39,787	-2
Visitors staying for leisure purposes	57,846	55,592	-4
Visitors staying with friends / relatives	23,595	22,500	-5
Visitors staying for business purposes	16,218	17,366	+7
Total staying visitors (excluding long stay)	97,569	95,458	-2
Average length of stay (excluding long stay)	4.35 nights	4.50 nights	+3
Total number of bed nights	424,605	429,731	+1
Total staying in commercial accommodation	75,939	75,003	-1
Bed nights in commercial accommodation	303,419	307,444	+1
Average stay in commercial accommodation	4.00 nights	4.10 nights	+2
Day visitors for leisure purposes	15,220	15,916	+5
Day visitors with friends / relatives	439	456	+4
Day visitors for business purposes	6,945	5,956	-14
Total day visitors	22,604	22,329	-1
Visitors from the UK	84,914	83,177	-2
Visitors from France	10,134	10,787	+6
Visitors from Jersey	12,664	9,188	-27
Visitors from elsewhere	13,568	15,554	+15
Long stay visitors	1,022	976	-5
Cruise ship passengers	52,797	53,066	+1
Visiting yachtsmen	7,346	6,400	-13
Departing Guernsey residents by air	96,717	98,098	+1
Departing Guernsey residents by sea	24,670	26,289	+7
Net Promoter Score	50.1	52.7	+5

2.1 Total departing passengers Q2

Table 2.1.1 Q2 total departing passengers by mode of transport

Year	By air	By sea
	Number	Number
2017	103,758	53,476
2018	101,617	53,888

As shown in **Table 2.1.1**, in Q2 2018 there were 101,617 departing passengers by air and 53,888 by sea. This represents a drop of 2% in air passenger numbers and an increase of 1% in sea passengers.

Table 2.1.2 Q2 total departing passengers by air and by type

	Visitors	Residents
	Number	Number
2017	51,927	51,831
2018	53,977	47,641

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 2.1.3 Q2 total departing passengers by sea and by type

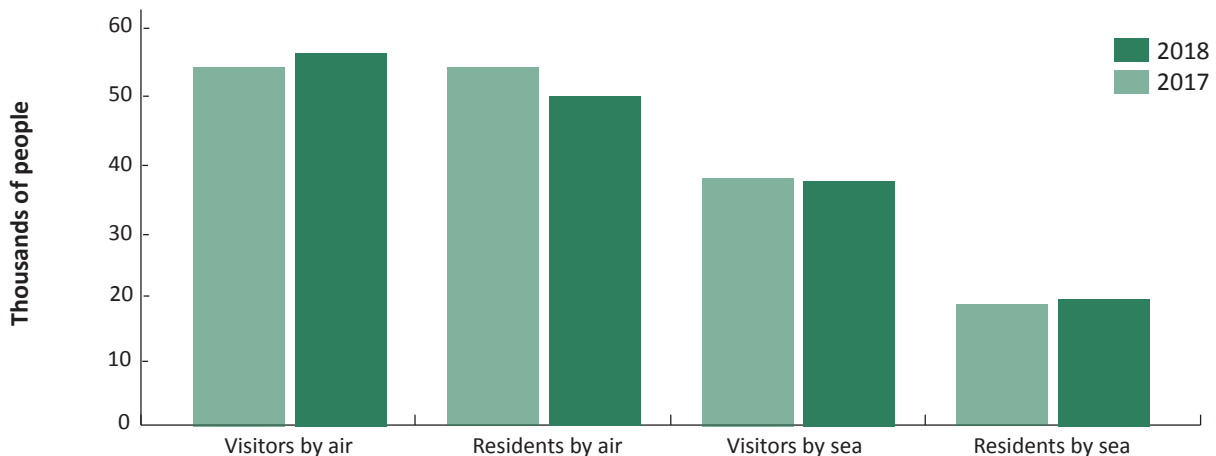
	Visitors	Residents
	Number	Number
2017	35,874	17,602
2018	35,457	18,431

Table 2.1.4 shows the percentages of departing visitors, returning visitors and residents during Q2.

Table 2.1.4 Q2 total departing passengers by type of passenger

	Number of passengers	% departing visitors	% returning visitors	% residents
2017	157,541	55.7	0.2	44.1
2018	156,117	57.3	0.4	42.3

Figure 2.1.1 Q2 total departing passengers by type and by mode of transport



2.2 Total departing passengers January to June

As shown in **Table 2.2.1**, during the period from January to June 2018 there were 177,074 departing passengers by air and 66,076 by sea (these figures include returning visitors). This represents a drop of <1% in air passenger numbers and an increase of 1% 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 June.

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

Year	By air	By sea
	Number	Number
2017	177,448	65,223
2018	177,074	66,076

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

	Visitors	Residents
	Number	Number
2017	80,732	96,716
2018	78,977	98,098

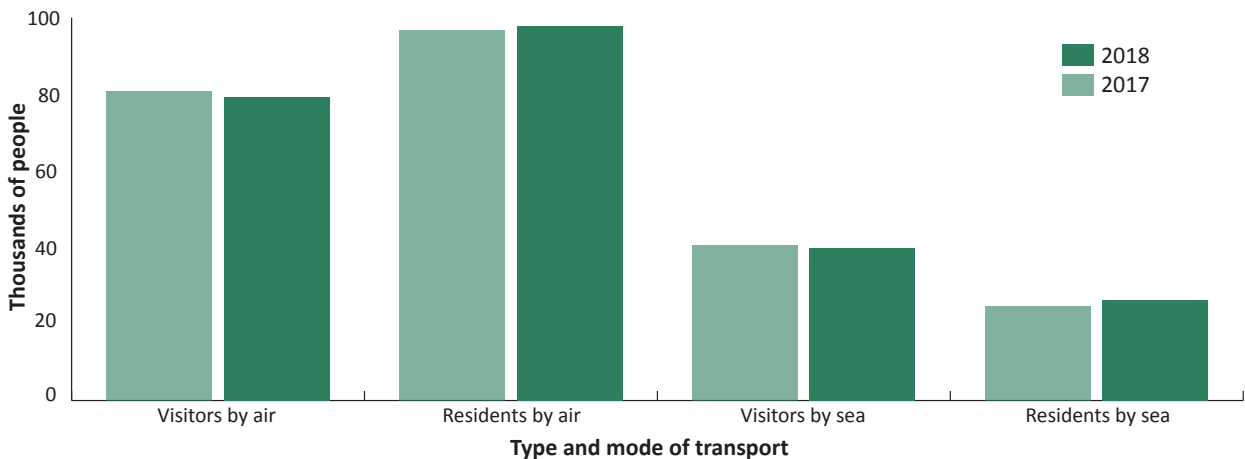
Table 2.2.3 Jan to June total departing passengers by sea and by type

	Visitors	Residents
	Number	Number
2017	40,553	24,670
2018	39,787	26,289

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

	Number of passengers	% departing visitors	% returning visitors	% residents
2017	243,346	49.8	0.3	49.9
2018	244,197	48.6	0.4	50.9

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



2.3 Departing visitors Q2 - by mode of transport

Table 2.3.1 Q2 departing visitors by air

Year	By air	
	Number	% change
2014	51,470	
2015	52,132	+1
2016	51,526	-1
2017	51,927	+1
2018	53,977	+4

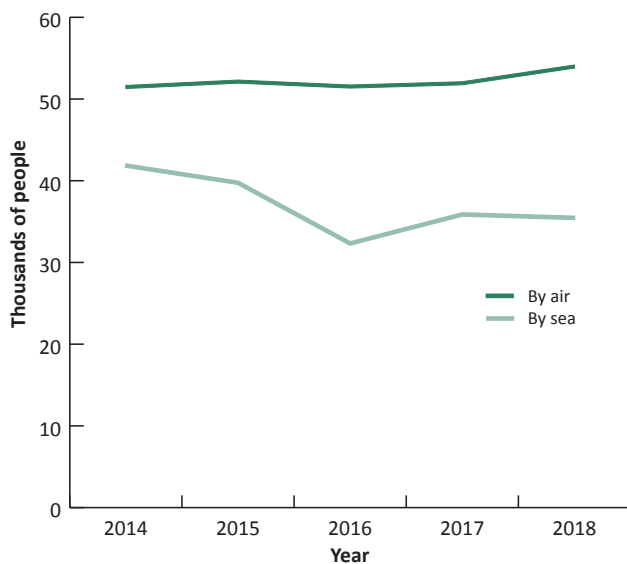
As shown in **Table 2.3.1** and **Table 2.3.2**, in Q2 2018 there were 53,977 departing visitors by air and 35,457 by sea.

This compares with 51,927 by air and 35,874 by sea in Q2 of 2017.

Table 2.3.2 Q2 departing visitors by sea

Year	By sea	
	Number	% change
2014	41,854	
2015	39,748	-5
2016	32,324	-19
2017	35,874	+11
2018	35,457	-1

Figure 2.3.1 Q2 departing visitors by mode of transport



2.4 Departing visitors Q2 - by purpose of visit

Table 2.4.1 shows the number of departing visitors during Q2 2018 broken down by purpose of visit. In Q2 2018 the highest proportion of visitors were staying leisure visitors (54%), followed by day leisure visitors (16%) and visitors staying with friends or relatives (VFR) (16%).

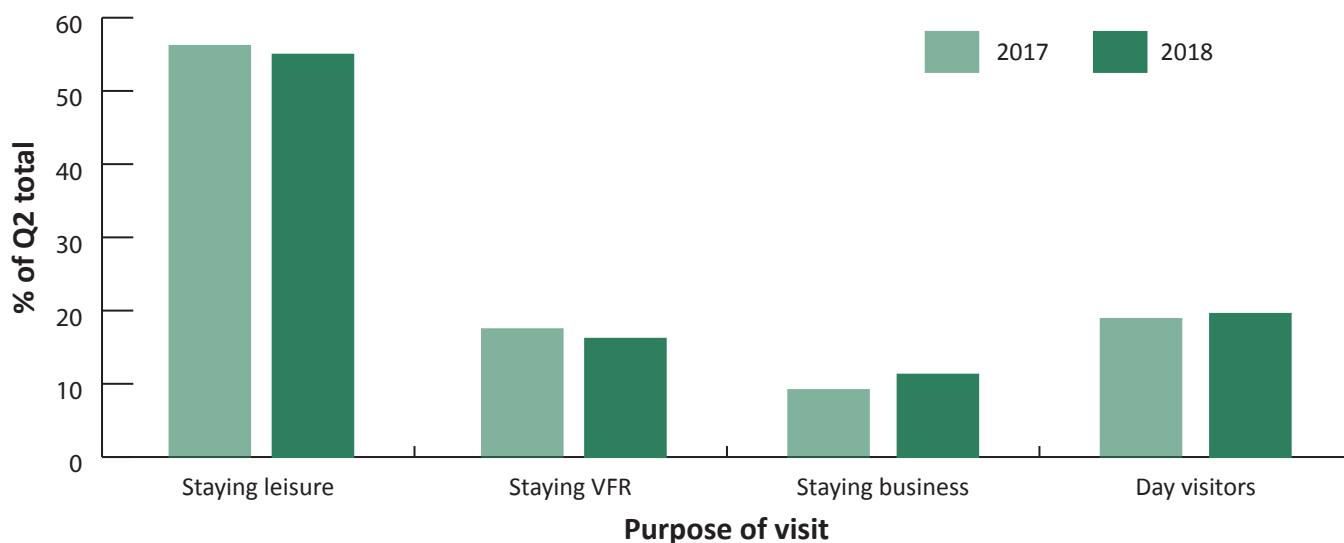
In Q2 2017 the respective percentages were 56%, 15% and 17%.

The total number of day visitors during Q2 was 16,984 in 2018, 19% of total visitors. The equivalent figure in Q2 2017 was 16,170, which was 18% of the total visitors for that period.

Table 2.4.1 Q2 departing visitors by purpose of visit

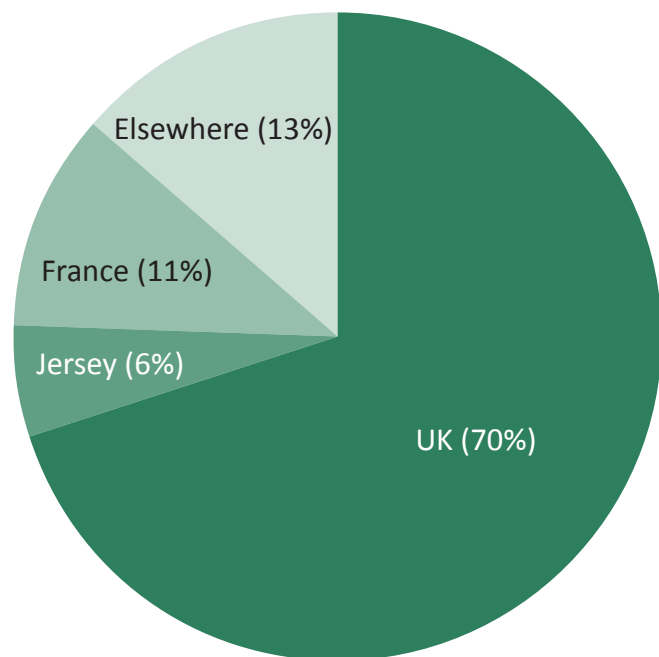
Purpose	2017		2018	
	Number	%	Number	%
Staying leisure	48,855	56	48,647	54
Visiting friends / relatives	14,809	17	13,947	16
Staying business	7,548	9	9,542	11
Day visit leisure	13,116	15	13,984	16
Day visit friends / relatives	297	<1	226	<1
Day visit business	2,758	3	2,773	3
Long stay visitors	419	<1	315	<1
TOTAL	87,801	100	89,434	100

Figure 2.4.1 Proportions of Q2 departing visitors by purpose of visit



2.5 Departing visitors Q2 - by country of residence

Figure 2.5.1 Q2 2018 departing visitors by country of residence



The majority of visitors during Q2 2018 were from the UK, as can be seen in **Figure 2.5.1** and **Table 2.5.1**.

Within the “Elsewhere” category, 4% were from Germany, 2% from Holland and the remaining 8% from other countries.

Table 2.5.1 Q2 departing visitors by country of residence

	UK	Jersey	France	Elsewhere
2014	62,528	10,636	5,541	14,619
2015	63,256	9,794	6,195	12,632
2016	56,547	8,594	8,569	10,137
2017	59,716	7,675	9,491	10,914
2018	62,610	5,005	9,737	12,078

2.6 Departing visitors Q2 - by accommodation and length of stay

Table 2.6.1 Q2 2018 departing visitors by type of accommodation

	2018	% of total
Hotel	49,764	69
Guest accom.	1,575	2
Self catering	5,430	8
Camping	1,096	2
Friends/relatives	12,184	17
Other	2,086	3

More people stayed in hotel accommodation than in any other type of accommodation in Q2 2018 (69%) (Table 2.6.1).

The overall average length of stay was 4.52 nights in Q2 2018.

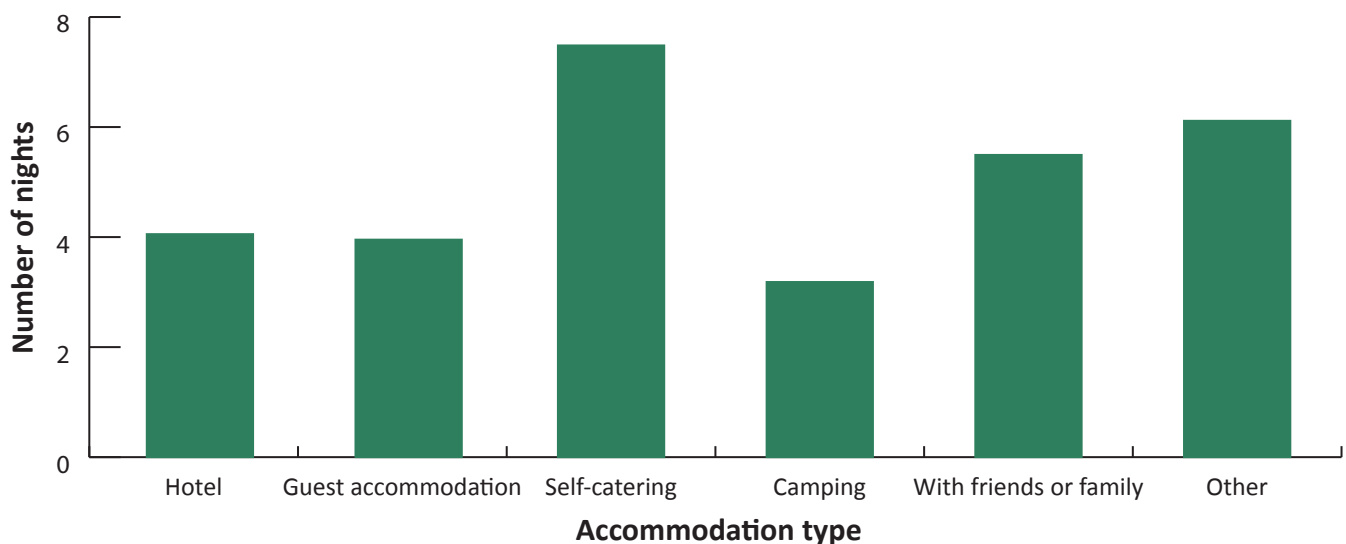
In total there were 326,289 overnight stays in Q2 2018, of which 260,213 were in commercial accommodation.

Table 2.6.2 Q2 2018 average length of stay (number of nights)

	Average length of stay
2014	4.47
2015	4.66
2016	4.35
2017	4.44
2018	4.52

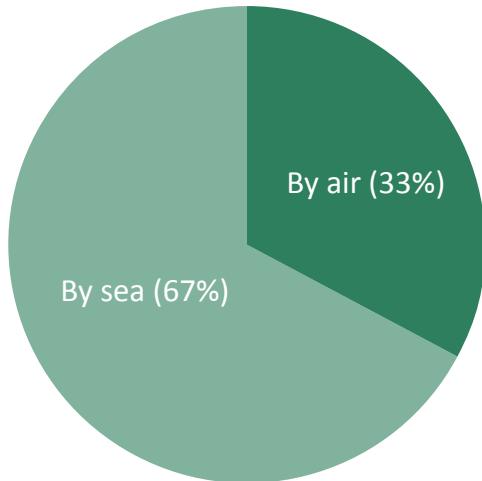
In quarter 2 2017 these figures were 316,529 and 246,892, giving increases of 3% and 5% respectively.

Figure 2.6.1 Average length of stay by accommodation type Q2 2018



2.7 Departing visitors Q2 - day visitors

Figure 2.11.1 Q2 2018 day visitors by mode of transport



The majority of departing visitors on a day trip were travelling by sea (67% in Q2 2018), as shown in **Figure 2.7.1**.

As a percentage of overall departing visitors, day visitors comprised 19% of the total (**Table 2.7.1**).

Table 2.7.2 shows that 82% of day visits were for leisure purposes, and 16% for business purposes.

Table 2.7.1 Q2 day visitors as percentage of total departing visitors

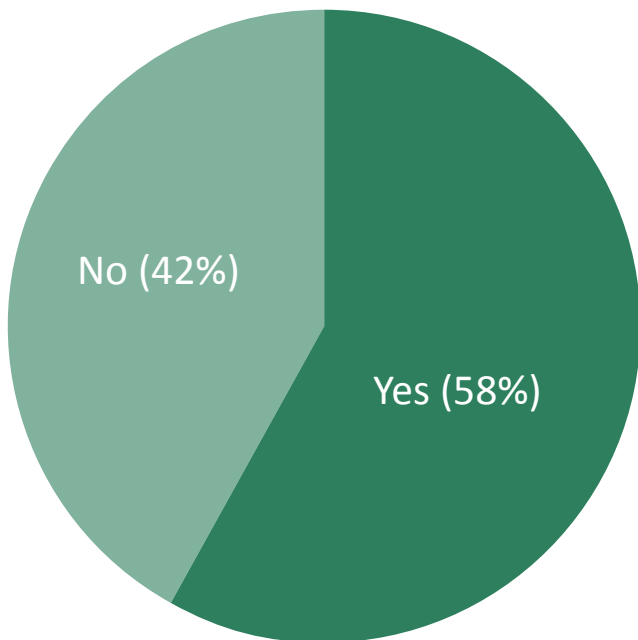
	Departing day visitors	Total departing visitors	Day visitors as % total departing visitors
2014	24,743	93,324	27
2015	19,061	91,879	21
2016	17,196	83,850	21
2017	16,170	87,801	18
2018	16,984	89,434	19

Table 2.7.2 Q2 day visitors

	2018	
	Number	%
Day visit leisure	13,984	82
Day visit friends / relatives	226	1
Day visit business	2,773	16
Total day visitors	16,984	100

2.8 Previous visits to Guernsey - Q2

Figure 2.8.1 Q2 visitors who had visited Guernsey previously



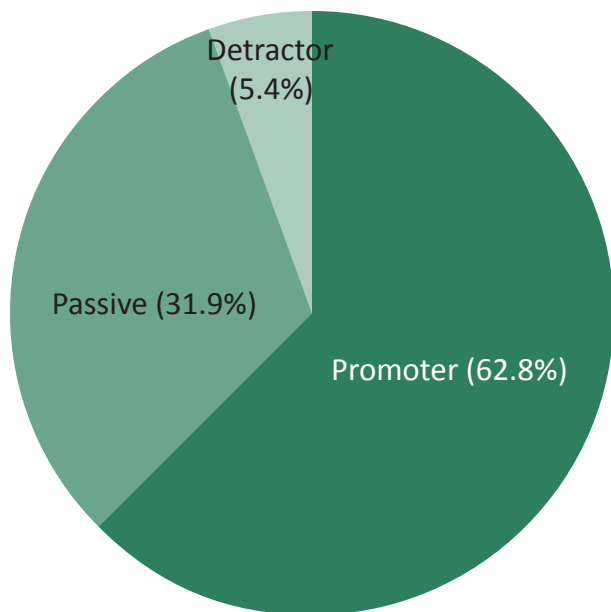
Respondents were asked if they had visited Guernsey before and, if so, had they visited on a cruise ship.

In Q2 2018 58% of all visitors had been to Guernsey previously.

Of those who had visited previously, 2.2% had visited on a cruise ship.

3.1 Recommendations of Guernsey - Q2

Figure 3.1.1 Q2 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 Q2 2018 the NPS was 57.4.

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

Table 3.1.1 Q2 number of promoters, passives and detractors

	2018	
	Number	as %
Promoters	2,773	62.8
Passives	1,409	31.9
Detractors	237	5.4
Net Promoter Score		57.4

4.1 Departing residents - Q2

Table 4.1.1 Q2 departing residents

	Total number	as % of total departing passengers
2014	79,425	46
2015	77,795	46
2016	73,155	47
2017	69,433	44
2018	66,071	42

The number of departing residents was 66,071 in Q2 2018.

The majority of departing residents travelled by air (72%) as can be seen in **Table 4.1.2**.

Table 4.1.2 Q2 departing residents by mode of transport

	by air	by sea
2014	55,699	23,726
2015	53,561	24,233
2016	53,536	19,619
2017	51,831	17,602
2018	47,641	18,431

5.1 Onward flights Q2

Residents and departing visitors were asked if they were flying onwards after their initial destination airport.

Table 5.1.1 shows that 18% of all passengers were flying on to another airport. 11,287 Guernsey residents (24% of total) and 6,648 of departing visitors (12% of total) were flying onwards in Q2 2018.

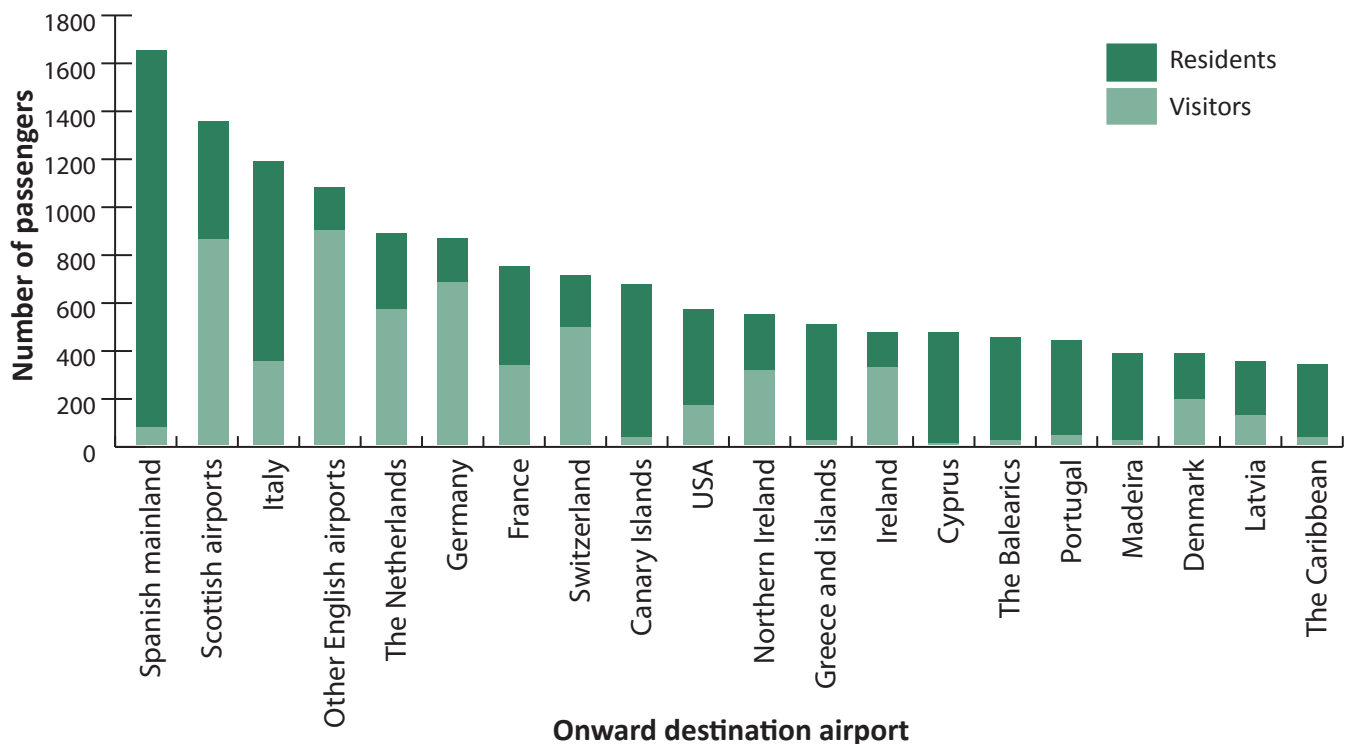
Table 5.1.1 Q2 Onwards flights

Initial destination airport	Visitor departures	Visitors travelling onward	Resident departures	Residents travelling onward
Birmingham	3,134	484	1,401	290
Bristol	2,165	115	1,338	21
East Midlands	2,227	5	503	5
Exeter	2,436	37	1,465	80
Gatwick	18,543	3,248	23,527	9,442
Manchester	6,342	100	2,336	204
Southampton	9,374	1,452	6,644	624
Stansted	2,694	223	1,283	389
Other UK airports	963	0	570	0
Jersey	4,789	984	8,341	231
Foreign airports	1,310	0	233	0
Total	53,977	6,648	47,641	11,287

5.1 Onward flights Q2 (continued)

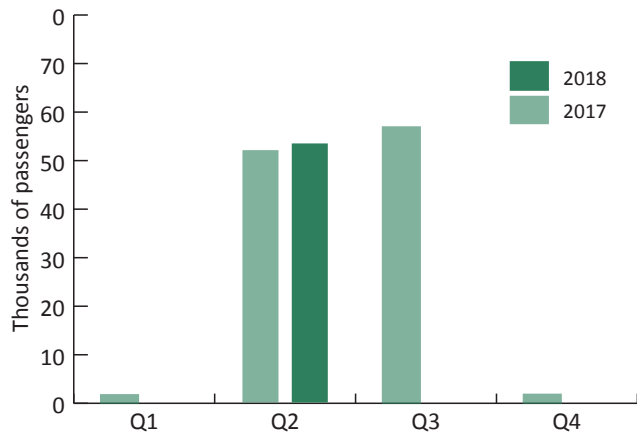
The most popular destinations for onward travel are shown in **Figure 5.1.1**. The highest number of passengers were flying on to the Spanish mainland, followed by airports in Scotland and Italy. The most popular destinations for departing visitors were other English airports, Scotland and Germany.

Figure 5.1.1 Most popular destinations for onward travel



6.1 Cruise passengers

Figure 6.1.1 Cruise passenger numbers to date



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 2 2018, the number of landed passengers was 53,066, compared with 51,689 in quarter 2 2017.

Table 6.1.1 Cruise passenger numbers

	2017	2018
Q1	1,108	0
Q2	51,689	53,066
Q3	56,288	
Q4	1,203	

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 quarter 2 2018 there were 6,114 visiting yachtsmen.

Figure 6.2.1 Visiting yachtsmen to date

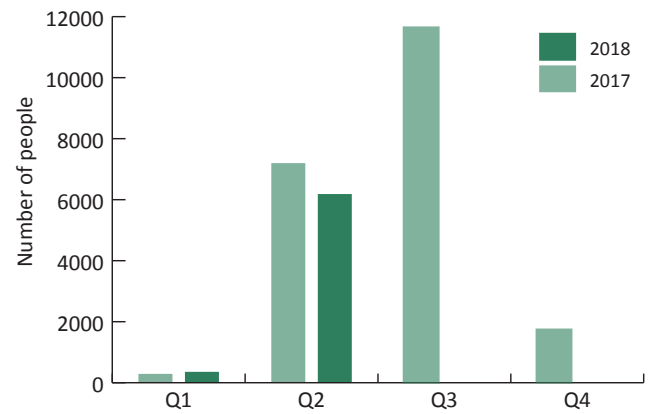


Table 6.2.1 Visiting yachtsmen

	2017	2018
Q1	219	286
Q2	7,127	6,114
Q3	11,562	
Q4	1,658	

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 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 Q2 2018 a total of 7,850 interviews were completed, which represented 16,942 passengers. This is 10.9% of the total number of passengers departing Guernsey during Q2 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.

E-mail: dataandanalysis@gov.gg

Telephone: (01481) 717292

Write / visit: Data and Analysis
Sir Charles Frossard House
La Charroterie
St Peter Port
Guernsey
GY1 1FH



For more information
go to gov.gg/data