

Guernsey Travel Survey

Quarter 3 2018

Issue date October 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.

Please note that the figures in this report do not include inter-Bailiwick travel (Alderney, Sark and Herm).

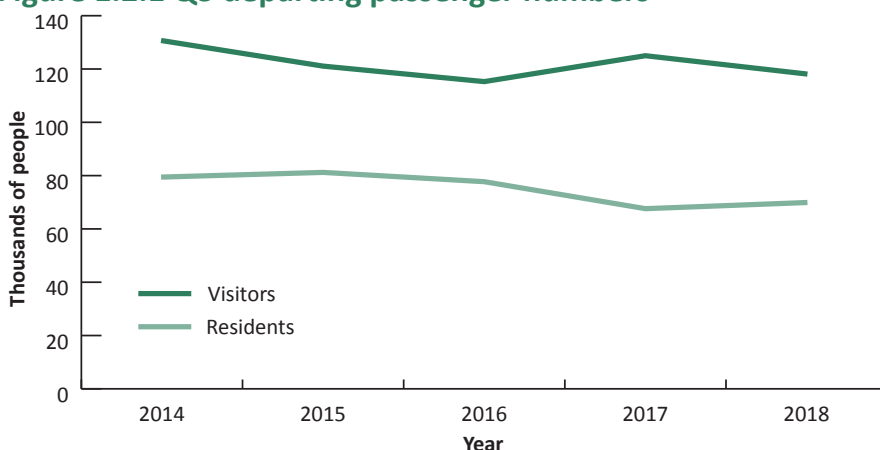
From April 2017 the methodology for data collection was updated. Planning and deployment of interview shifts changed from quarterly to monthly, hence year on year figures are subject to methodological changes and may not be strictly comparable.

NOTE: During Q3 2018 there were several issues with cancelled ferries, change of ferry route or change in ferry departure time, which meant that some ferry departures were not covered by interview shifts. In addition, weekday flights were over-sampled compared with weekend flights. The combination of events led to a possible over-sampling of residents compared with visitors and of business travel compared with leisure.

1.2 Headlines for Q3 2018

- The total number of departing **passengers** (both visitors and residents) for Q3 2018 was 188,030. The total number of departing **visitors** for Q3 2018 was 118,130. The total number of departing **residents** was 69,900 in Q3 2018.
- Of the 118,130 departing visitors in Q3 2018, 59% travelled by air and 41% by sea.
- 7% of visitors travelled for business purposes, 17% were visiting friends or relatives, 60% 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 Q3 2018 was 5.30 nights.
- 71% of visitors during Q3 2018 were from the UK, 7% from France and 6% from Jersey.

Figure 1.2.1 Q3 departing passenger numbers



1.3 Summary for Q3 2018

Table 1.3.1 Summary of Q3 2018 results compared with Q3 2017

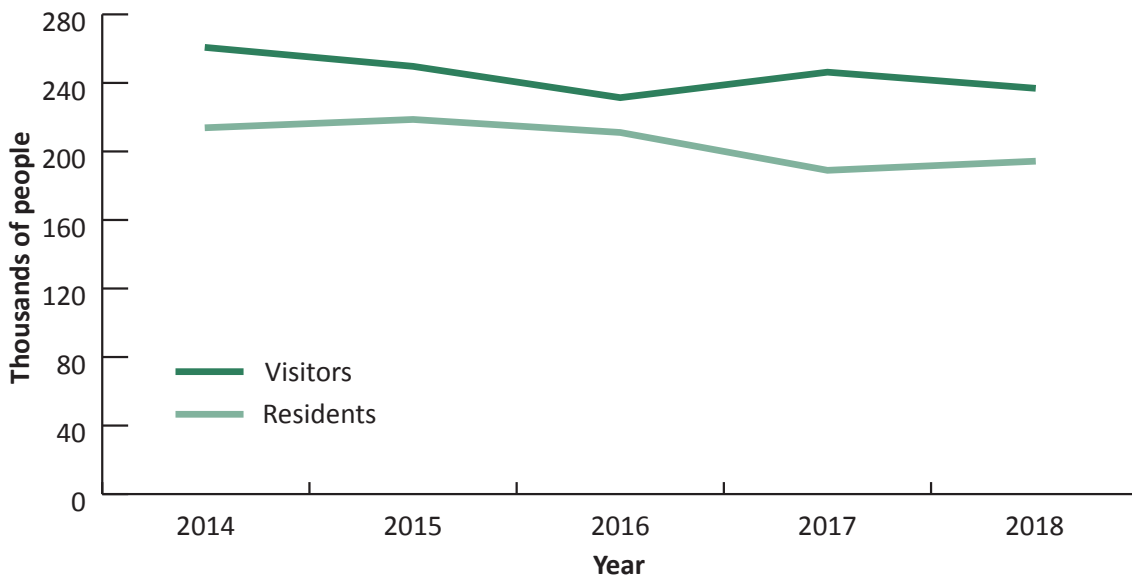
	Q3 2017	Q3 2018	% change
Total departing visitors	124,989	118,130	-5
Total departing residents	67,595	69,900	+3
Total departing passengers	192,584	188,030	-2
Departing visitors by air	68,902	69,843	+1
Departing visitors by sea	56,087	48,287	-14
Visitors staying for leisure purposes	74,252	70,989	-4
Visitors staying with friends / relatives	18,247	20,225	+11
Visitors staying for business purposes	7,567	8,674	+15
Total staying visitors (excluding long stay)	100,065	99,888	<1
Average length of stay (excluding long stay)	5.29	5.01	-5
Total number of bed nights	529,918	500,475	-6
Total staying in commercial accommodation	81,603	79,818	-2
Bed nights in commercial accommodation	403,535	384,235	-5
Average stay in commercial accommodation	4.95	4.81	-3
Day visitors for leisure purposes	20,895	13,944	-33
Day visitors with friends / relatives	360	346	-4
Day visitors for business purposes	2,901	3,375	+16
Total day visitors	24,155	17,665	-27
Visitors from the UK	87,675	84,334	-4
Visitors from France	13,739	8,161	-41
Visitors from Jersey	5,780	6,823	+18
Visitors from elsewhere	17,841	18,809	+5
Long stay visitors	768	578	-25
Cruise ship passengers	56,288	64,681	+15
Visiting yachtsmen	11,562	11,416	-1
Departing Guernsey residents by air	50,232	48,395	-4
Departing Guernsey residents by sea	17,363	21,505	+24
Net Promoter Score	53.0	60.9	+15

NOTE: During Q3 2018 there were several issues with cancelled ferries, change of ferry route or change in ferry departure time, which meant that some ferry departures were not covered by interview shifts. In addition, weekday flights were over-sampled compared with weekend flights. The combination of events led to a possible over-sampling of residents compared with visitors and of business travel compared with leisure.

1.4 Headlines for January to September 2018

- The total number of departing **passengers** (both visitors and residents) for January to September 2018 was 431,180.
- The total number of departing **visitors** for January to September 2018 was 236,894. The total number of departing **residents** was 194,286 in January to September 2018.
- Of the 236,894 departing visitors in January to September 2018, 63% travelled by air and 37% by sea.
- 11% of visitors travelled for business purposes, 18% were visiting friends or relatives, 53% 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 January to September 2018 was 4.90 nights.
- 71% of visitors during January to September 2018 were from the UK, 8% from France, 7% from Jersey and the remainder from elsewhere.

Figure 1.4.1 January to September departing passenger numbers



NOTE: During Q3 2018 there were several issues with cancelled ferries, change of ferry route or change in ferry departure time, which meant that some ferry departures were not covered by interview shifts. In addition, weekday flights were over-sampled compared with weekend flights. The combination of events led to a possible over-sampling of residents compared with visitors and of business travel compared with leisure.

1.5 Summary for January to September 2018

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

	Jan to Sept 2017	Jan to Sept 2018	% change
Total departing visitors	246,274	236,894	-4
Total departing residents	188,982	194,286	+3
Total departing passengers	435,255	431,180	-1
Departing visitors by air	149,634	148,820	-1
Departing visitors by sea	96,640	88,074	-9
Visitors staying for leisure purposes	132,099	126,581	-4
Visitors staying with friends / relatives	41,841	42,725	+2
Visitors staying for business purposes	23,785	26,040	+9
Total staying visitors (excluding long stay)	197,725	195,346	-1
Average length of stay (excluding long stay)	4.82	4.76	-1
Total number of bed nights	954,522	930,205	-3
Total staying in commercial accommodation	157,542	154,821	-2
Bed nights in commercial accommodation	706,954	691,679	-2
Average stay in commercial accommodation	4.49	4.47	<1
Day visitors for leisure purposes	36,115	29,860	-17
Day visitors with friends / relatives	798	803	+1
Day visitors for business purposes	9,846	9,331	-5
Total day visitors	46,759	39,994	-14
Visitors from the UK	172,589	167,511	-3
Visitors from France	23,873	18,948	-21
Visitors from Jersey	18,444	16,011	-13
Visitors from elsewhere	31,409	34,363	+9
Long stay visitors	1,790	1,554	-13
Cruise ship passengers	109,085	117,747	+8
Visiting yachtsmen	18,908	17,816	-6
Departing Guernsey residents by air	146,948	146,493	<1
Departing Guernsey residents by sea	42,033	47,794	+14
Net Promoter Score	51.5	57.0	+11

NOTE: During Q3 2018 there were several issues with cancelled ferries, change of ferry route or change in ferry departure time, which meant that some ferry departures were not covered by interview shifts. In addition, weekday flights were over-sampled compared with weekend flights. The combination of events led to a possible over-sampling of residents compared with visitors and of business travel compared with leisure.

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
2017	119,134	73,450
2018	118,239	69,792

As shown in **Table 2.1.1**, in Q3 2018 there were 118,239 departing passengers by air and 69,792 by sea. This represents a drop of 1% in air passenger numbers and 5% in sea passengers.

Table 2.1.2 Q3 total departing passengers by air and by type

	Visitors	Residents
	Number	Number
2017	68,902	50,232
2018	69,843	48,395

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**.

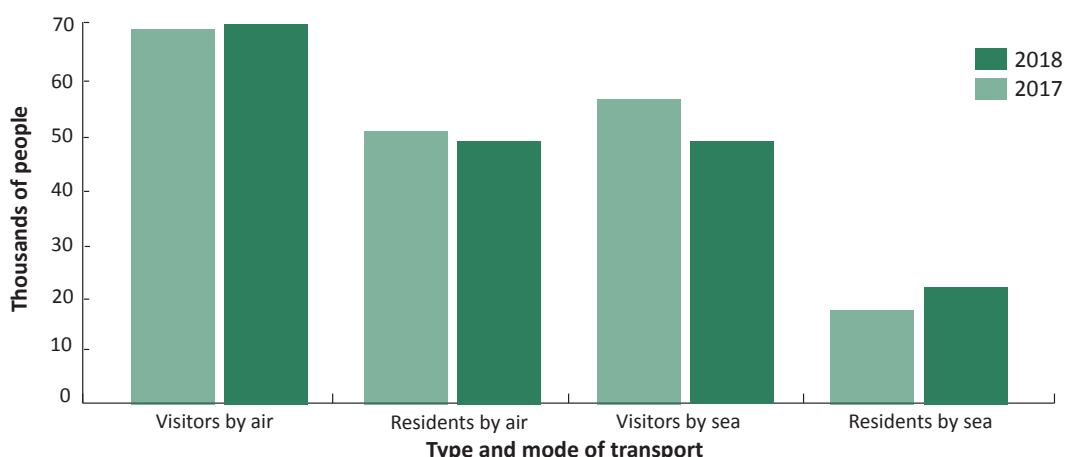
Table 2.1.3 Q3 total departing passengers by sea and by type

	Visitors	Residents
	Number	Number
2017	56,087	17,363
2018	48,287	21,505

Table 2.1.4 Q3 total departing passengers by type of passenger

	Number of passengers	% departing visitors	% returning visitors	% residents
2017	193,111	64.7	0.3	35.0
2018	188,492	62.7	0.2	37.1

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



NOTE: During Q3 2018 there were several issues with cancelled ferries, change of ferry route or change in ferry departure time, which meant that some ferry departures were not covered by interview shifts. In addition, weekday flights were over-sampled compared with weekend flights. The combination of events led to a possible over-sampling of residents compared with visitors and of business travel compared with leisure.

2.2 Total departing passengers January to September

As shown in **Table 2.2.1**, during the period from January to September 2018 there were 295,312 departing passengers by air and 135,868 by sea (these figures include returning visitors). This represents a drop of <1% in air passenger numbers and 2% 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 2.2.1 Jan to Sept total departing passengers by mode of transport

Year	By air	By sea
	Number	Number
2017	296,582	138,673
2018	295,312	135,868

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

	Visitors	Residents
	Number	Number
2017	149,634	146,948
2018	148,820	146,493

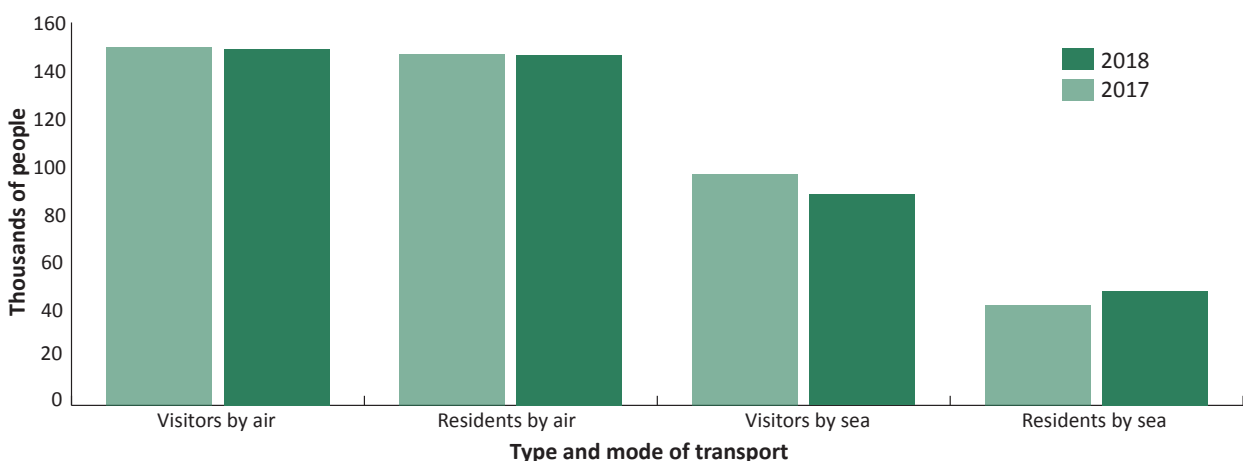
Table 2.2.3 Jan to Sept total departing passengers by sea and by type

	Visitors	Residents
	Number	Number
2017	96,640	42,033
2018	88,074	47,794

Table 2.2.4 Jan to Sept total passengers by type of passenger

	Number of passengers	% departing visitors	% returning visitors	% residents
2017	436,457	56.4	0.3	43.3
2018	432,689	54.7	0.3	44.9

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



NOTE: During Q3 2018 there were several issues with cancelled ferries, change of ferry route or change in ferry departure time, which meant that some ferry departures were not covered by interview shifts. In addition, weekday flights were over-sampled compared with weekend flights. The combination of events led to a possible over-sampling of residents compared with visitors and of business travel compared with leisure.

2.3 Departing visitors Q3 - by mode of transport

Table 2.3.1 Q3 departing visitors by air

Year	By air	
	Number	% change
2014	68,007	
2015	66,841	-2
2016	70,265	+5
2017	68,902	-2
2018	69,843	+1

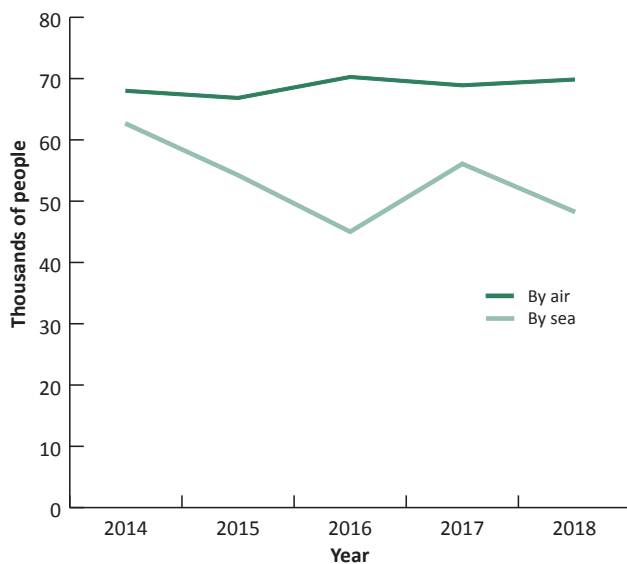
As shown in **Table 2.3.1** and **Table 2.3.2**, in Q3 2018 there were 69,843 departing visitors by air and 48,287 by sea.

This compares with 68,902 by air and 56,087 by sea in Q3 of 2017.

Table 2.3.2 Q3 departing visitors by sea

Year	By sea	
	Number	% change
2014	62,644	
2015	54,244	-13
2016	45,006	-17
2017	56,087	+25
2018	48,287	-14

Figure 2.3.1 Q3 departing visitors by mode of transport



NOTE: During Q3 2018 there were several issues with cancelled ferries, change of ferry route or change in ferry departure time, which meant that some ferry departures were not covered by interview shifts. In addition, weekday flights were over-sampled compared with weekend flights. The combination of events led to a possible over-sampling of residents compared with visitors and of business travel compared with leisure.

2.4 Departing visitors Q3 - by purpose of visit

Table 2.4.1 shows the number of departing visitors during Q3 2018 broken down by purpose of visit. In Q3 2018 the highest proportion of visitors were staying leisure visitors (60%), followed by visitors staying with friends or relatives (VFR) (17%).

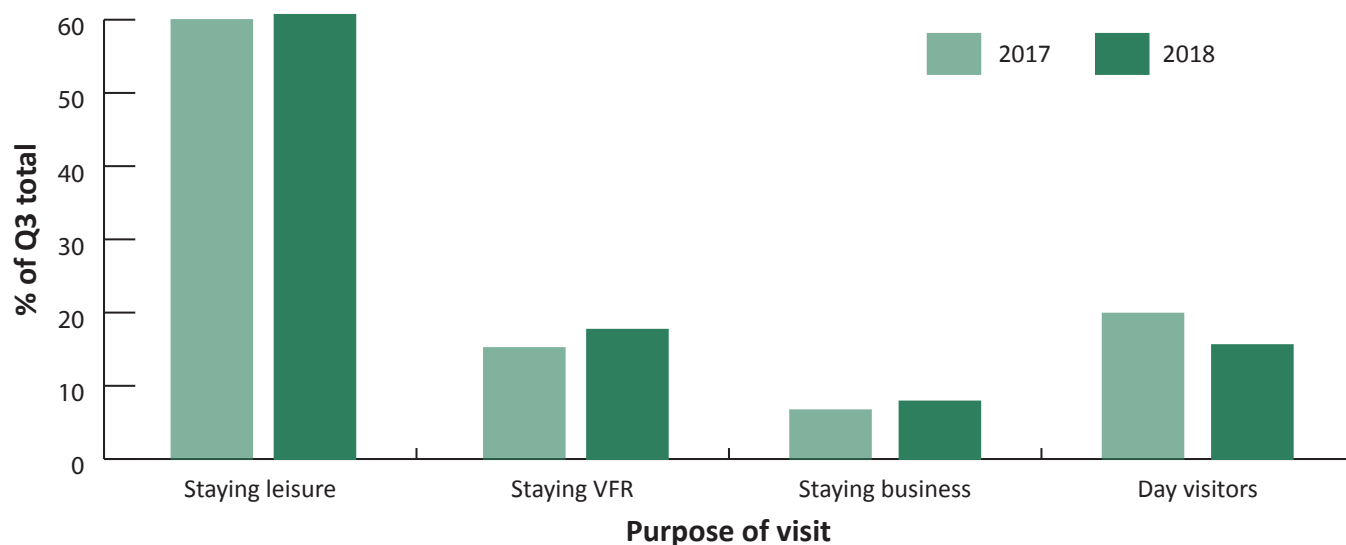
In Q3 2017 the respective percentages were 59% and 15%.

The total number of day visitors during Q3 was 17,665 in 2018, 15% of total visitors. The equivalent figure in Q3 2017 was 24,155, which was 19% of the total visitors for that period.

Table 2.4.1 Q3 departing visitors by purpose of visit

Purpose	2017		2018	
	Number	%	Number	%
Staying leisure	74,252	59	70,989	60
Visiting friends / relatives	18,247	15	20,225	17
Staying business	7,567	6	8,674	7
Day visit leisure	20,895	17	13,944	12
Day visit friends / relatives	360	<1	346	<1
Day visit business	2,901	2	3,375	3
Long stay visitors	768	<1	578	<1
TOTAL	124,989	100	118,130	100

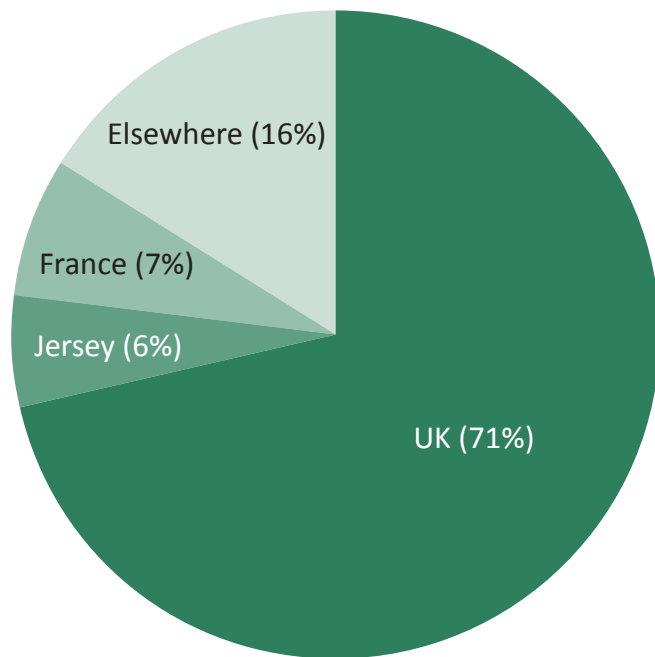
Figure 2.4.1 Proportions of Q3 departing visitors by purpose of visit



NOTE: During Q3 2018 there were several issues with cancelled ferries, change of ferry route or change in ferry departure time, which meant that some ferry departures were not covered by interview shifts. In addition, weekday flights were over-sampled compared with weekend flights. The combination of events led to a possible over-sampling of residents compared with visitors and of business travel compared with leisure.

2.5 Departing visitors Q3 - by country of residence

Figure 2.5.1 Q3 2018 departing visitors by country of residence



The majority of visitors during Q3 2018 were from the UK, as can be seen in **Figure 2.5.1** and **Table 2.5.1**.

Within the “Elsewhere” category, 5% were from Germany, 2% from Holland and the remaining 9% from other countries.

Table 2.5.1 Q3 departing visitors by country of residence

	UK	Jersey	France	Elsewhere
2014	90,401	11,282	11,422	17,545
2015	88,778	8,781	8,179	15,345
2016	82,882	6,010	11,789	14,620
2017	87,675	5,780	13,739	17,841
2018	84,334	6,823	8,161	18,809

NOTE: During Q3 2018 there were several issues with cancelled ferries, change of ferry route or change in ferry departure time, which meant that some ferry departures were not covered by interview shifts. In addition, weekday flights were over-sampled compared with weekend flights. The combination of events led to a possible over-sampling of residents compared with visitors and of business travel compared with leisure.

2.6 Departing visitors Q3 - by accommodation and length of stay

Table 2.6.1 Q3 2018 departing visitors by type of accommodation

	2018	% of total
Hotel	60,798	61
Guest accom.	2,292	2
Self catering	7,853	8
Camping	4,558	5
Friends/relatives	20,071	20
Other	4,317	4

More people stayed in hotel accommodation than in any other type of accommodation in Q3 2018 (61%) (Table 2.6.1).

The overall average length of stay was 5.01 nights in Q3 2018.

In total there were 500,475 overnight stays in Q3 2018, of which 384,235 were in commercial accommodation.

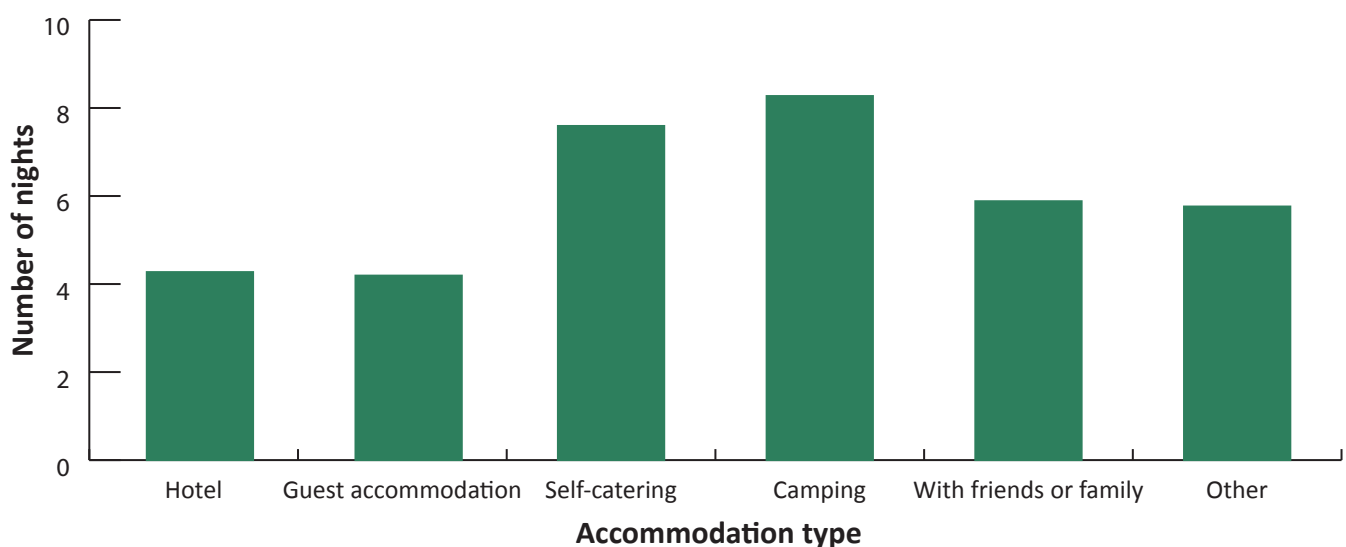
Table 2.6.2 Q3 2018 average length of stay (number of nights)

	Average length of stay
2014	5.42
2015	5.50
2016	5.41
2017	5.29
2018*	5.01

In Q3 2017 these figures were 529,918 and 403,535, giving decreases of 6% and 5% respectively.

*See the note below, which may also have impacted the length of stay figures.

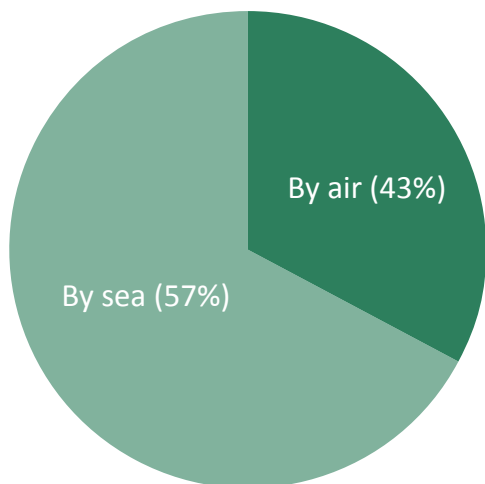
Figure 2.6.1 Average length of stay by accommodation type Q3 2018



NOTE: During Q3 2018 there were several issues with cancelled ferries, change of ferry route or change in ferry departure time, which meant that some ferry departures were not covered by interview shifts. In addition, weekday flights were over-sampled compared with weekend flights. The combination of events led to a possible over-sampling of residents compared with visitors and of business travel compared with leisure.

2.7 Departing visitors Q3 - day visitors

Figure 2.7.1 Q3 2018 day visitors by mode of transport



The majority of departing visitors on a day trip were travelling by sea (57% in Q3 2018), as shown in **Figure 2.7.1**.

As a percentage of overall departing visitors, day visitors comprised 15% of the total (**Table 2.7.1**).

Table 2.7.2 shows that 79% of day visits were for leisure purposes, and 19% for business purposes.

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
2014	34,284	130,650	26
2015	27,251	121,085	23
2016	19,208	115,271	17
2017	24,155	124,989	19
2018	17,665	118,130	15

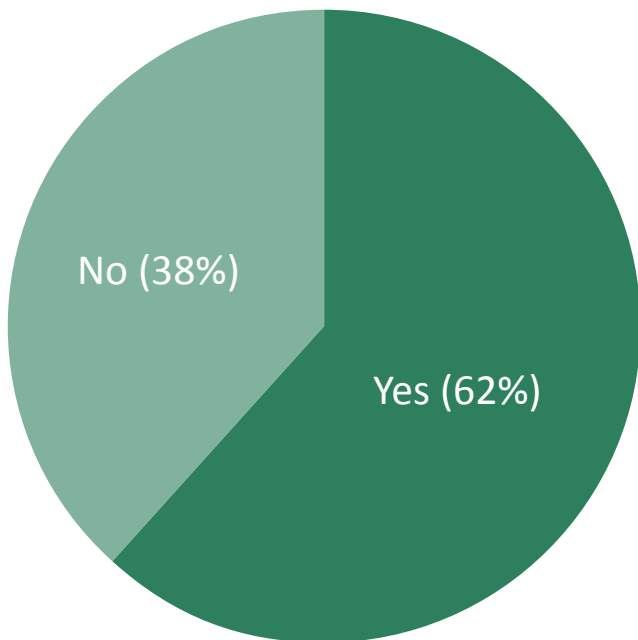
Table 2.7.2 Q3 day visitors

	2018	
	Number	%
Day visit leisure	13,944	79
Day visit friends / relatives	346	2
Day visit business	3,375	19
Total day visitors	17,665	100

NOTE: During Q3 2018 there were several issues with cancelled ferries, change of ferry route or change in ferry departure time, which meant that some ferry departures were not covered by interview shifts. In addition, weekday flights were over-sampled compared with weekend flights. The combination of events led to a possible over-sampling of residents compared with visitors and of business travel compared with leisure.

2.8 Previous visits to Guernsey - Q3

Figure 2.8.1 Q3 visitors who had visited Guernsey previously



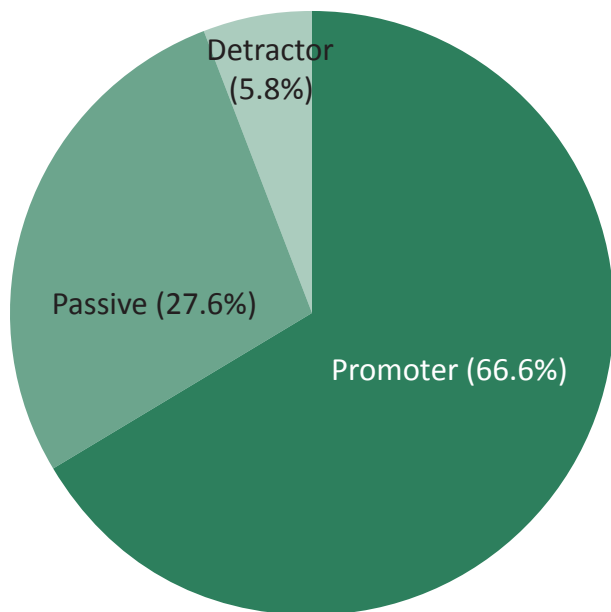
Respondents were asked if they had visited Guernsey before and, if so, had they visited on a cruise ship.

In Q3 2018 62% 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 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 Q3 2018 the NPS was 60.9.

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

	2018	
	Number	as %
Promoters	4,598	66.6
Passives	1,905	27.6
Detractors	398	5.8
Net Promoter Score		60.9

4.1 Departing residents - Q3

Table 4.1.1 Q3 departing residents

	Total number	as % of total departing passengers
2014	79,452	38
2015	81,205	40
2016	77,719	40
2017	67,595	35
2018	69,900	37

The number of departing residents was 69,900 in Q3 2018.

The majority of departing residents travelled by air (69%) as can be seen in **Table 4.1.2**.

Table 4.1.2 Q3 departing residents by mode of transport

	by air	by sea
2014	55,245	24,207
2015	55,478	25,727
2016	50,542	27,177
2017	50,232	17,363
2018	48,395	21,505

NOTE: During Q3 2018 there were several issues with cancelled ferries, change of ferry route or change in ferry departure time, which meant that some ferry departures were not covered by interview shifts. In addition, weekday flights were over-sampled compared with weekend flights. The combination of events led to a possible over-sampling of residents compared with visitors and of business travel compared with leisure.

5.1 Onward flights Q3

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

Table 5.1.1 shows that 20% of all passengers were flying on to another airport. 14,993 Guernsey residents (31% of total) and 8,479 departing visitors (12% of total) were flying onwards in Q3 2018.

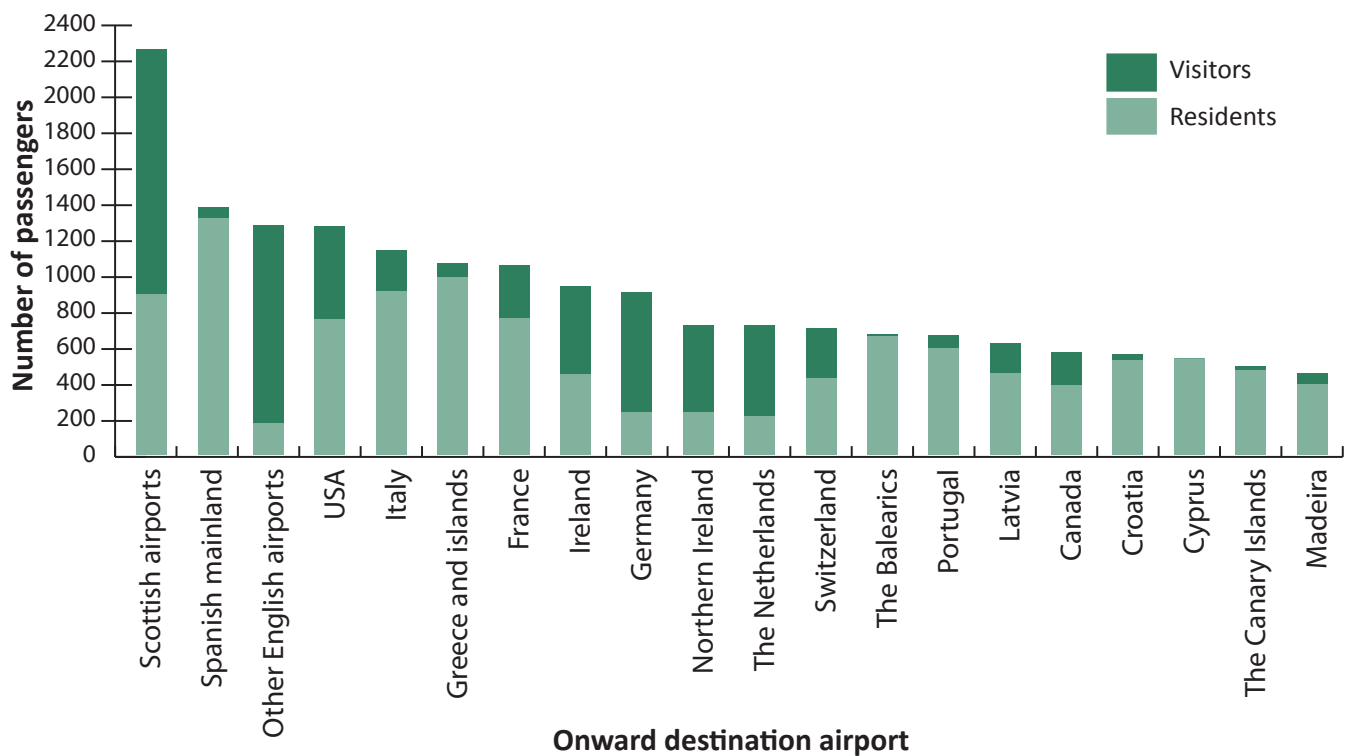
Table 5.1.1 Q3 Onwards flights

Initial destination airport	Visitor departures	Visitors travelling onward	Resident departures	Residents travelling onward
Birmingham	3,815	584	1,797	507
Bristol	3,145	57	1,160	32
East Midlands	3,182	10	586	57
Exeter	3,095	183	1,401	63
Gatwick	21,608	3,544	25,902	12,562
Manchester	8,301	125	2,281	180
Southampton	11,186	2,114	6,870	756
Stansted	3,942	260	1,147	416
Other UK airports	3,382	64	524	-
Jersey	6,658	1,485	6,538	418
Foreign airports	1,529	55	190	-
Total	69,843	8,479	48,396	14,993

5.1 Onward flights Q3 (continued)

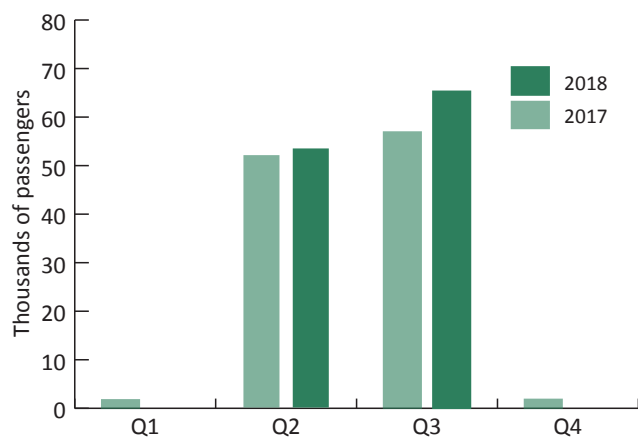
The most popular destinations for onward travel are shown in **Figure 5.1.1**. The highest number of passengers were flying on to airports in Scotland, followed by the Spanish mainland and other English airports. The most popular destinations for departing visitors were Scottish and English airports,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

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](#).

Table 6.1.1 Cruise passenger numbers

	2017	2018
Q1	1,108	0
Q2	51,689	53,066
Q3	56,288	64,681
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**.

Figure 6.2.1 Visiting yachtsmen to date

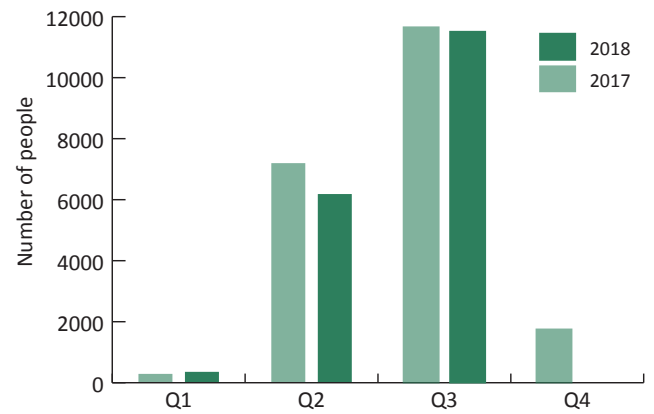


Table 6.2.1 Visiting yachtsmen

	2017	2018
Q1	219	286
Q2	7,127	6,114
Q3	11,562	11,416
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 Q3 2018 a total of 9,126 interviews were completed, which represented 20,055 passengers. This is 10.6% of the total number of passengers departing Guernsey during Q3 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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