

# Guernsey Travel Survey

Quarter 2 2017

Issue date July 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, applying the findings 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.

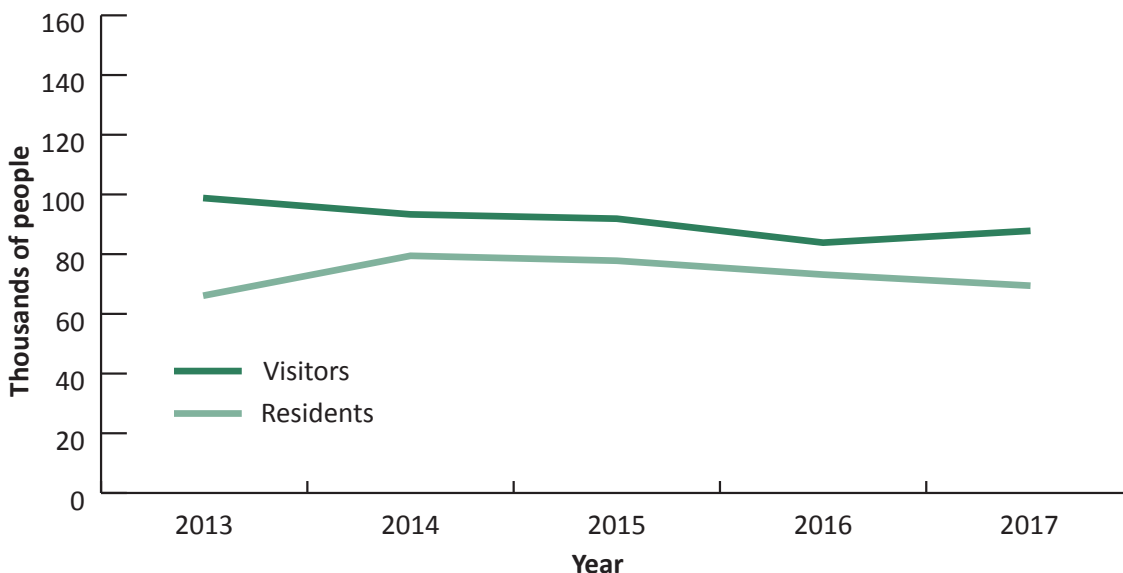
It should be noted that the figures in this report do not include inter-Bailiwick travel (Alderney, Sark and Herm). Figures have been rounded to the nearest 50 and therefore may not always add up precisely.

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 Q2 2017

- The total number of departing **passengers** (both visitors and residents) for Q2 2017 was 157,550.
- The total number of departing **visitors** for Q2 2017 was 87,800. The total number of departing **residents** was 69,450 in Q2 2017.
- Of the 87,800 departing visitors in Q2 2017, 59% travelled by air and 41% by sea.
- 12% of visitors travelled for business purposes, 17% were visiting friends or relatives and 56% were leisure visitors staying for at least one night.
- The average length of stay for those who stayed at least one night in Q2 2017 was 4.44 nights.
- 68.0% of visitors during Q2 2017 were from the UK, 10.8% from France and 8.7% from Jersey.

**Figure 1.2.1 Q2 departing passenger numbers**



## 1.3 Summary for Q2 2017

**Table 1.3.1 Summary of Q2 2017 results compared with Q2 2016**

	Q2 2016	Q2 2017	% change
<b>Total departing visitors</b>	83,850	87,800	+4.7%
<b>Total departing residents</b>	73,150	69,450	-5.1%
<b>Total returning visitors</b>	450	300	
<b>Total departing passengers</b>	<b>157,450</b>	<b>157,550</b>	<b>+0.1%</b>
<b>Departing visitors by air</b>	51,550	51,950	+0.8%
<b>Departing visitors by sea</b>	32,300	35,850	+11.0%
<b>Visitors staying for leisure purposes*</b>	45,100	48,850	+8.3%
<b>Visitors staying with friends / relatives</b>	12,550	14,800	+17.9%
<b>Visitors staying for business purposes</b>	8,450	7,550	-10.9%
<b>Total staying visitors (excluding long stay)</b>	<b>66,150</b>	<b>71,200</b>	<b>+7.7%</b>
<b>Average length of stay (excluding long stay)</b>	4.35 nights	4.44 nights	+2.2%
<b>Total number of bed nights</b>	287,650	316,550	+10.0%
<b>Total staying in commercial accommodation</b>	55,250	58,050	+5.1%
<b>Average stay in commercial accommodation</b>	4.16 nights	4.25 nights	+2.2%
<b>Bed nights in commercial accommodation</b>	230,000	246,900	+7.3%
<b>Day visitors for leisure purposes*</b>	13,800	13,100	-4.9%
<b>Day visitors with friends / relatives</b>	150	300	+85.6%
<b>Day visitors for business purposes</b>	3,250	2,750	-14.9%
<b>Total day visitors</b>	<b>17,200</b>	<b>16,150</b>	<b>-6.0%</b>
<b>Visitors from the UK</b>	56,550	59,700	+5.6%
<b>Visitors from France</b>	8,550	9,500	+10.8%
<b>Visitors from Jersey</b>	8,600	7,700	-10.7%
<b>Visitors from elsewhere</b>	10,150	10,900	+7.7%
<b>Long stay visitors</b>	500	400	-17.2%
<b>Cruise ship passengers</b>	64,970	51,690	-20.4%
<b>Visiting yachtsmen and yachtswomen</b>	5,530	7,130	+28.9%
<b>Departing Guernsey residents by air</b>	53,550	51,850	-3.2%
<b>Departing Guernsey residents by sea</b>	19,600	17,600	-10.3%
<b>Net Promoter Score</b>	51.5	56.0	+8.7%

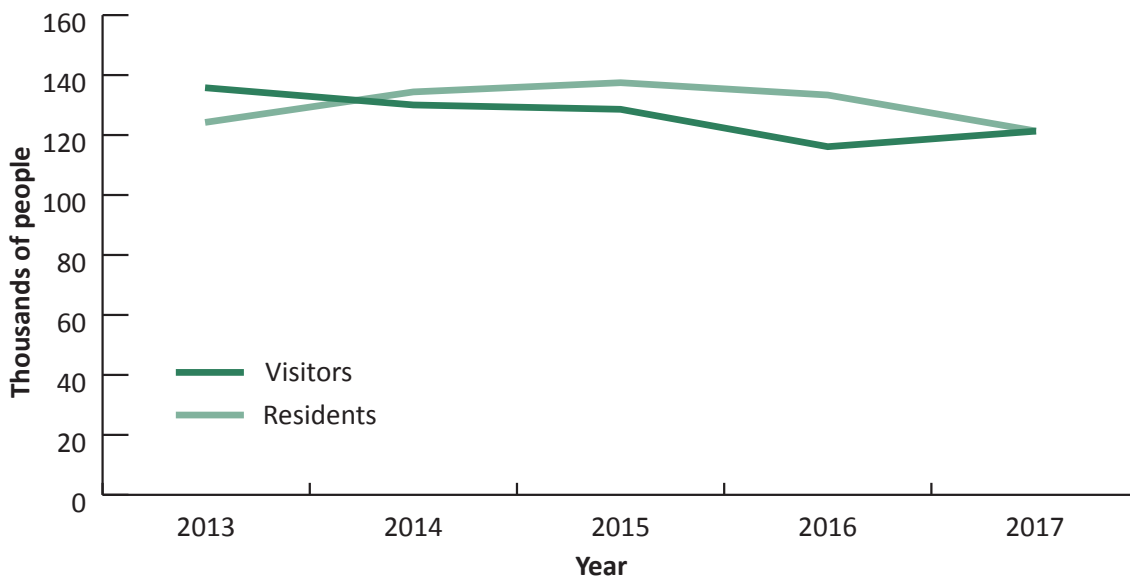
Note: some figures may not add up precisely due to rounding

\* 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.

## 1.4 Headlines for January to June 2017

- The total number of departing **passengers** (both visitors and residents) for Q1+Q2 2017 was 243,350.
- The total number of departing **visitors** for Q1+Q2 2017 was 121,300. The total number of departing **residents** was 121,400 in Q1+Q2 2017.
- Of the 121,300 departing visitors in Q1+Q2 2017, 67% travelled by air and 33% by sea.
- 13% of visitors travelled for business purposes, 19% were visiting friends or relatives and 48% were leisure visitors staying for at least one night.
- The average length of stay for those who stayed at least one night in Q1+Q2 2017 was 4.35 nights.
- 70.0% of visitors during Q1+Q2 2017 were from the UK, 8.4% from France and 10.4% from Jersey.

**Figure 1.4.1 January to June departing passenger numbers**



## 1.5 Summary for January to June 2017

**Table 1.5.1 Summary of January to June 2017 results compared with Q1+Q2 2016**

	Q1+Q2 2016	Q1+Q2 2017	% change
<b>Total departing visitors</b>	116,100	121,300	+4.4%
<b>Total departing residents</b>	133,350	121,400	-9.0%
<b>Total returning visitors</b>	650	650	
<b>Total departing passengers</b>	<b>250,100</b>	<b>243,350</b>	<b>-2.7%</b>
<b>Departing visitors by air</b>	80,500	80,750	+0.3%
<b>Departing visitors by sea</b>	35,600	40,550	+13.8%
<b>Visitors staying for leisure purposes*</b>	53,450	57,850	+8.2%
<b>Visitors staying with friends / relatives</b>	23,700	23,600	-0.5%
<b>Visitors staying for business purposes</b>	14,950	16,200	+8.4%
<b>Total staying visitors (excluding long stay)</b>	<b>92,100</b>	<b>97,650</b>	<b>+6.0%</b>
<b>Average length of stay (excluding long stay)</b>	4.26 nights	4.35 nights	+2.1%
<b>Total number of bed nights</b>	392,400	424,600	+8.2%
<b>Total staying in commercial accommodation</b>	71,100	75,950	+6.8%
<b>Average stay in commercial accommodation</b>	3.92 nights	4.00 nights	+2.0%
<b>Bed nights in commercial accommodation</b>	278,500	303,400	+8.9%
<b>Day visitors for leisure purposes*</b>	15,850	15,200	-3.9%
<b>Day visitors with friends / relatives</b>	300	450	+41.6%
<b>Day visitors for business purposes</b>	7,150	6,950	-2.8%
<b>Total day visitors</b>	<b>23,300</b>	<b>22,600</b>	<b>-2.9%</b>
<b>Visitors from the UK</b>	81,350	84,900	+4.4%
<b>Visitors from France</b>	9,400	10,150	+7.6%
<b>Visitors from Jersey</b>	12,900	12,650	-2.0%
<b>Visitors from elsewhere</b>	12,400	13,550	+9.2%
<b>Long stay visitors</b>	700	1,000	+42.7%
<b>Cruise ship passengers</b>	64,970	52,800	-18.7%
<b>Visiting yachtsmen and yachtswomen</b>	5,750	7,350	+27.7%
<b>Departing Guernsey residents by air</b>	108,500	96,700	-10.9%
<b>Departing Guernsey residents by sea</b>	24,850	24,650	-0.7%
<b>Net Promoter Score</b>	48.6	50.1	+3.1%

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.

## 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
2016	105,450	52,000
2017	104,050	53,500

**Table 2.1.2 Q2 total departing passengers by air and by type**

	Visitors	Residents
	Number	Number
2016	51,550	53,550
2017	51,950	51,850

**Table 2.1.3 Q2 total departing passengers by sea and by type**

	Visitors	Residents
	Number	Number
2016	32,300	19,600
2017	35,850	17,600

**Table 2.1.4 Q2 total departing passengers by type of passenger**

	Number of passengers	% departing visitors	% returning visitors	% residents
2016	157,450	53.3%	0.3%	46.4%
2017	157,550	55.7%	0.2%	44.1%

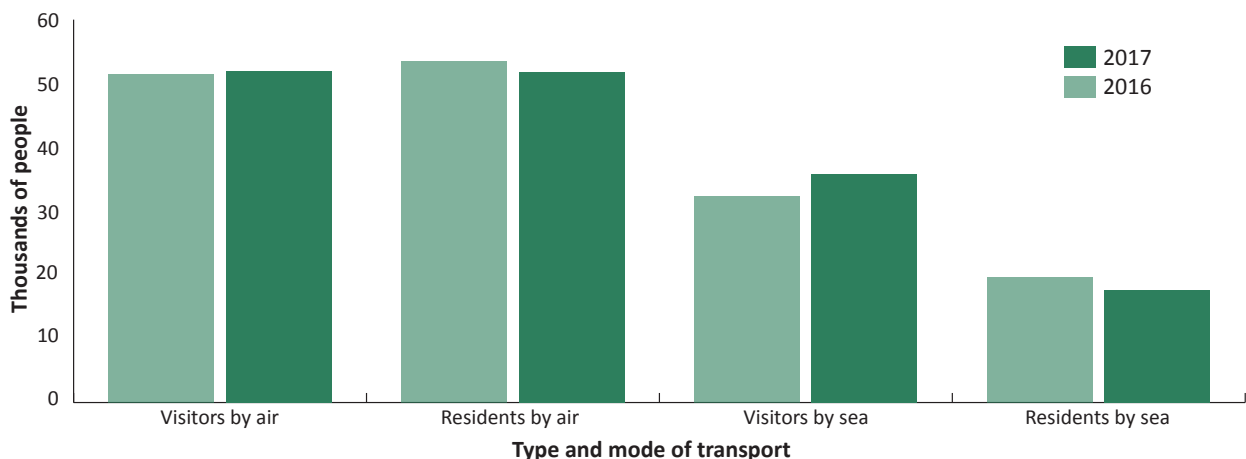
As shown in **Table 2.1.1**, in Q2 2017 there were 104,050 departing passengers by air and 53,500 by sea (these figures include returning visitors). This represents a drop of 1.4% in air passenger numbers and an increase of 2.9% in sea passengers.

**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 Q2.

**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 2017 there were 178,050 departing passengers by air and 65,300 by sea (these figures include returning visitors). This represents a drop of 6.1% in air passenger numbers and an increase of 7.9% 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 Q1+Q2 total departing passengers by mode of transport**

Year	By air	By sea
	Number	Number
2016	189,600	60,500
2017	178,050	65,300

**Table 2.2.2 Q1+Q2 total departing passengers by air and by type**

	Visitors	Residents
	Number	Number
2016	80,500	108,500
2017	80,750	96,700

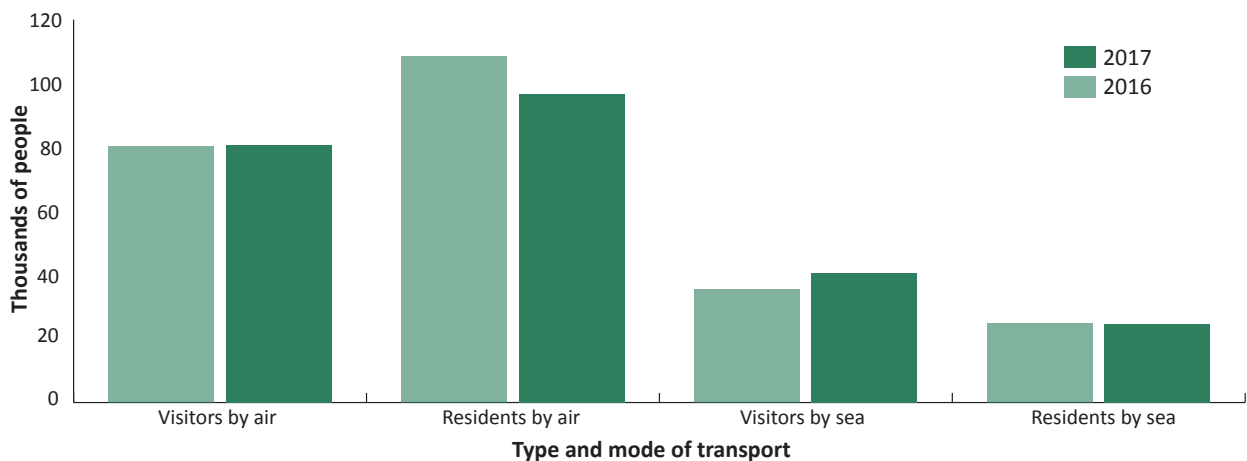
**Table 2.2.3 Q1+Q2 total departing passengers by sea and by type**

	Visitors	Residents
	Number	Number
2016	35,600	24,850
2017	40,550	24,650

**Table 2.2.4 Q1+Q2 total departing passengers by type of passenger**

	Number of passengers	% departing visitors	% returning visitors	% residents
2016	250,100	46.4%	0.3%	53.3%
2017	243,350	49.8%	0.3%	49.9%

**Figure 2.2.1 Q1+Q2 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
2013	58,250	+5.3%
2014	51,450	-11.6%
2015	52,150	+1.3%
2016	51,550	-1.2%
2017	51,950	+0.8%

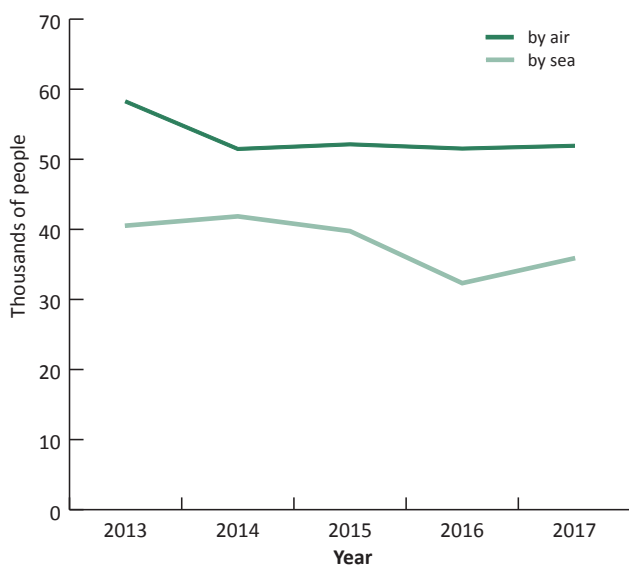
As shown in **Table 2.3.1**, in Q2 2017 there were 51,950 departing visitors by air and 35,850 by sea.

This compares with 51,550 by air and 32,300 by sea in Q2 of 2016.

**Table 2.3.2 Q2 departing visitors by sea**

Year	By sea	
	Number	% change
2013	40,550	-1.7%
2014	41,850	+3.3%
2015	39,750	-5.0%
2016	32,300	-18.7%
2017	35,850	+11.0%

**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 2017 broken down by purpose of visit. In Q2 2017 the highest proportion of visitors were staying leisure visitors (55.6%), followed by visitors staying with friends or relatives (VFR) (16.9%) and day leisure visitors (14.9%).

In Q2 2016 the respective percentages were 53.8%, 15.0% and 16.5%.

The total number of day visitors during Q2 was 16,150 in 2017, 18% of total visitors. The equivalent figure in Q2 2016 was 17,200, which was 21% of the total visitors for that period.

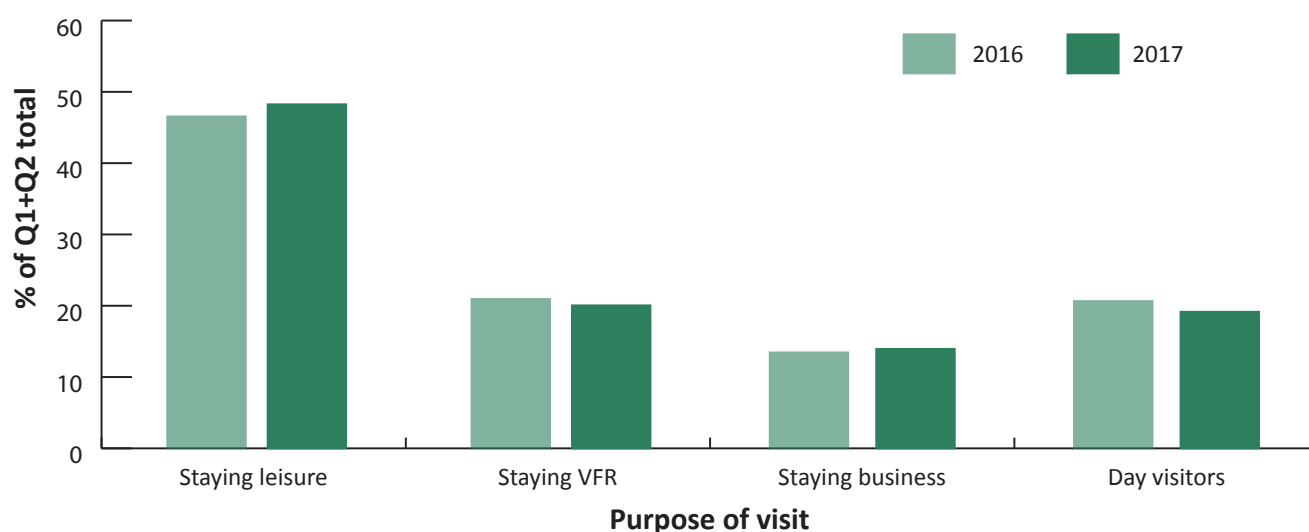
**Table 2.4.1 Q2 departing visitors by purpose of visit**

Purpose	2016		2017	
	Number	%	Number	%
Staying leisure*	45,100	53.8	48,850	55.6
Visiting friends / relatives	12,550	15.0	14,800	16.9
Staying business	8,450	10.1	7,550	8.6
Day visit leisure*	13,800	16.5	13,100	14.9
Day visit friends / relatives	150	0.2	300	0.3
Day visit business	3,250	3.9	2,750	3.1
Long stay visitors	500	0.6	400	0.5
<b>TOTAL</b>	<b>83,850</b>	<b>100.0</b>	<b>87,800</b>	<b>100.0</b>

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

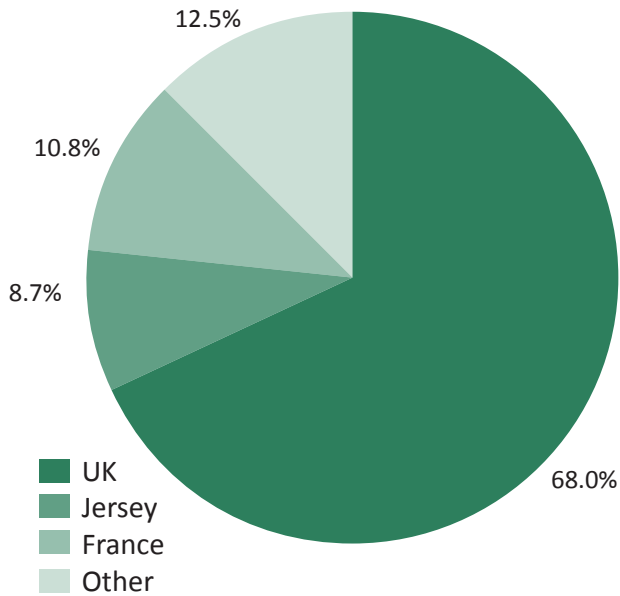
\* There have been methodological changes since the last quarterly report: the "leisure" category now also includes all travellers who are not travelling for business purposes or staying with friends or family.

**Figure 2.4.1 Proportions of Q2 departing visitors by purpose of visit**



## 2.5 Departing visitors Q2 - by country of residence

**Figure 2.5.1 Q2 2017 departing visitors by country of residence**



The majority of visitors during Q2 2017 were from the UK, as can be seen in **Figure 2.5.1** and **Table 2.5.1**.

Within the “Other” category, 4.3% were from Germany, 1.4% from Holland and the remaining 6.9% from other countries.

**Table 2.5.1 Q2 2017 departing visitors by country of residence**

	UK	Jersey	France	Other
<b>2013</b>	65,600	10,400	10,650	12,150
<b>2014</b>	62,550	10,650	5,550	14,600
<b>2015</b>	63,250	9,800	6,200	12,650
<b>2016</b>	56,550	8,600	8,550	10,150
<b>2017</b>	59,700	7,700	9,500	10,900

## 2.6 Departing visitors Q2 - by accommodation and length of stay

**Table 2.6.1 Q2 2017 departing visitors by type of accommodation**

	2017	% of total
Hotel	45,700	65.6
Guest accom.	1,950	2.8
Self catering	5,300	7.5
Camping	2,200	3.1
Friends/relatives	13,150	18.5
Other	1,850	2.6

More people stayed in hotel accommodation than in any other type of accommodation in Q2 2017 (65.6%) (Table 2.6.1).

The overall average length of stay was 4.44 nights in Q2 2017.

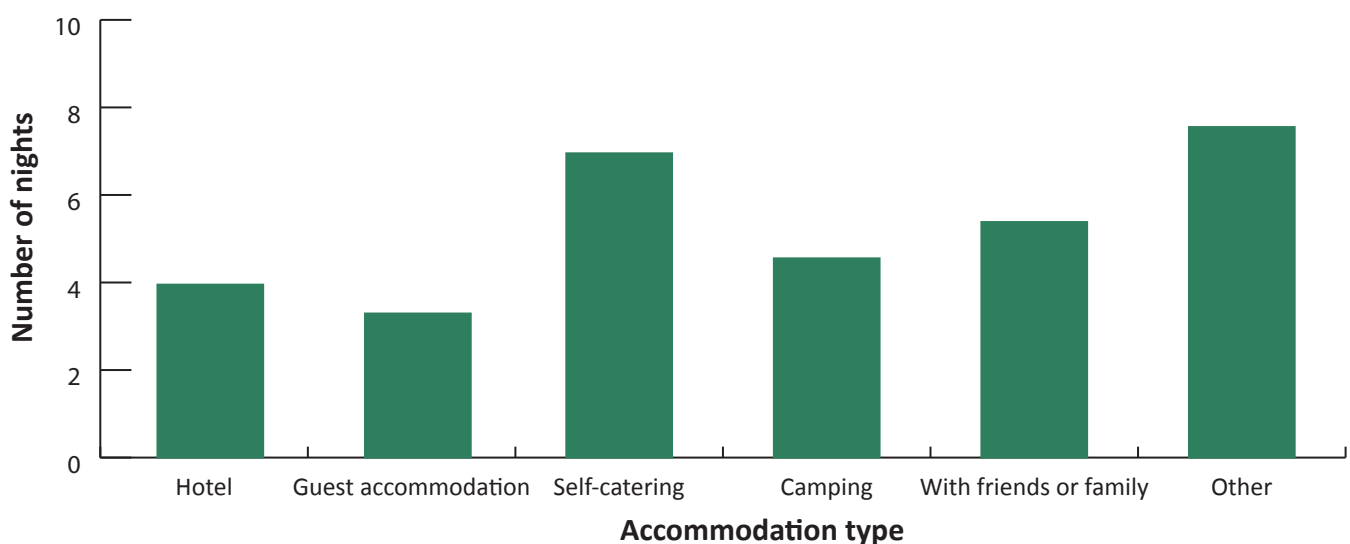
In total there were 316,550 overnight stays in Q2 2017, of which 246,900 were in commercial accommodation.

**Table 2.6.2 Q2 2017 average length of stay (number of nights)**

	Average length of stay
2013	4.46
2014	4.47
2015	4.66
2016	4.35
2017	4.44

In quarter 2 2016 these figures were 287,700 and 222,600, giving increases of 10% and 11% respectively.

**Figure 2.6.1 Average length of stay by accommodation type Q2 2017**



## 2.7 Departing visitors Q2 - day visitors

**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
2013	25,400	98,750	25.7
2014	24,750	93,300	26.5
2015	19,050	91,900	20.7
2016	17,200	83,850	20.5
2017	16,150	87,800	18.4

As a percentage of overall departing visitors, day visitors comprised 18.4% of the total (**Table 2.7.1**).

**Table 2.7.2** shows that 81.1% of day visits were for leisure purposes, and 17.1% for business purposes.

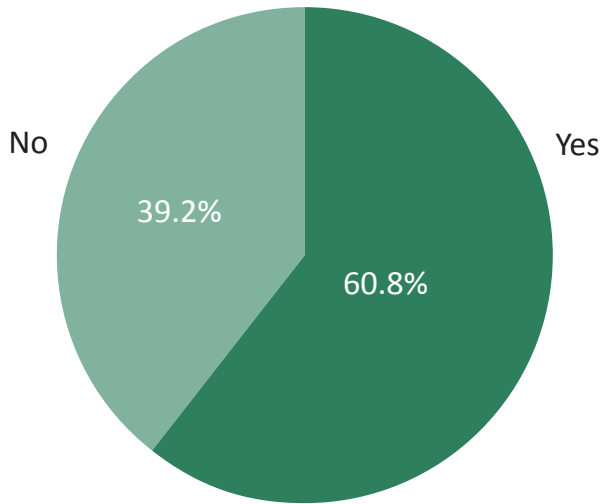
**Table 2.7.2 Q2 day visitors**

	2017	
	Number	%
Day visit leisure*	13,100	81.1
Day visit friends / relatives	300	1.8
Day visit business	2,750	17.1
<b>Total day visitors</b>	<b>16,150</b>	<b>100.0</b>

\* 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 - Q2

**Figure 2.8.1 Q2 visitors who had visited Guernsey previously**



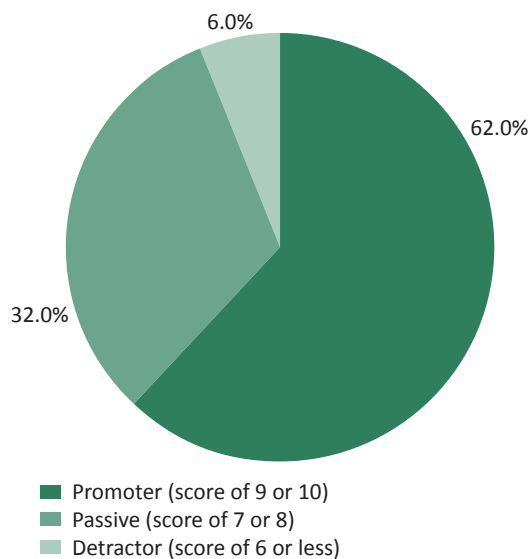
Respondents were asked if they had visited Guernsey before and, if so, had they visited on a cruise ship.

In Q2 2017 60.8% of all visitors had been to Guernsey previously.

Of those who had visited previously, 3.1% had visited on a cruise ship.

## 3.1 Recommendations of Guernsey - Q2

**Figure 4.1.1 Q2 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 4.1.1). An overall net promoter score (NPS) was found by subtracting the proportion of detractors from the proportion of promoters.

In Q2 2017 the NPS was 56.0.

A breakdown of promoters, passives and detractors is given in Figure 4.1.1.

**Table 4.1.1 Q2 number of promoters, passives and detractors**

	2017	
	Number	as %
<b>Promoters</b>	2,470	62.0
<b>Passives</b>	1,274	32.0
<b>Detractors</b>	240	6.0
<b>Net Promoter Score</b>	-	56.0

## 4.1 Departing residents - Q2

**Table 4.1.1 Q2 departing residents**

	Total number	as % of total departing passengers
2013	66,150	40.0
2014	79,450	45.9
2015	77,800	45.8
2016	73,150	46.4
2017	69,450	44.1

The number of departing residents was 69,450 in Q2 2017.

The majority of departing residents travelled by air (74.6%) as can be seen in [Table 4.1.2](#).

**Table 4.1.2 Q2 departing residents by mode of transport**

	by air	by sea
2013	48,550	17,600
2014	55,700	23,750
2015	53,550	24,250
2016	53,550	19,600
2017	51,850	17,600

## 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 23.1% of all passengers were flying on to another airport. 17,200 Guernsey residents (33.2% of total) and 6,750 of departing visitors (13.1% of total) were flying onwards in the second quarter of 2017.

**Table 5.1.1 Q2 Onwards flights**

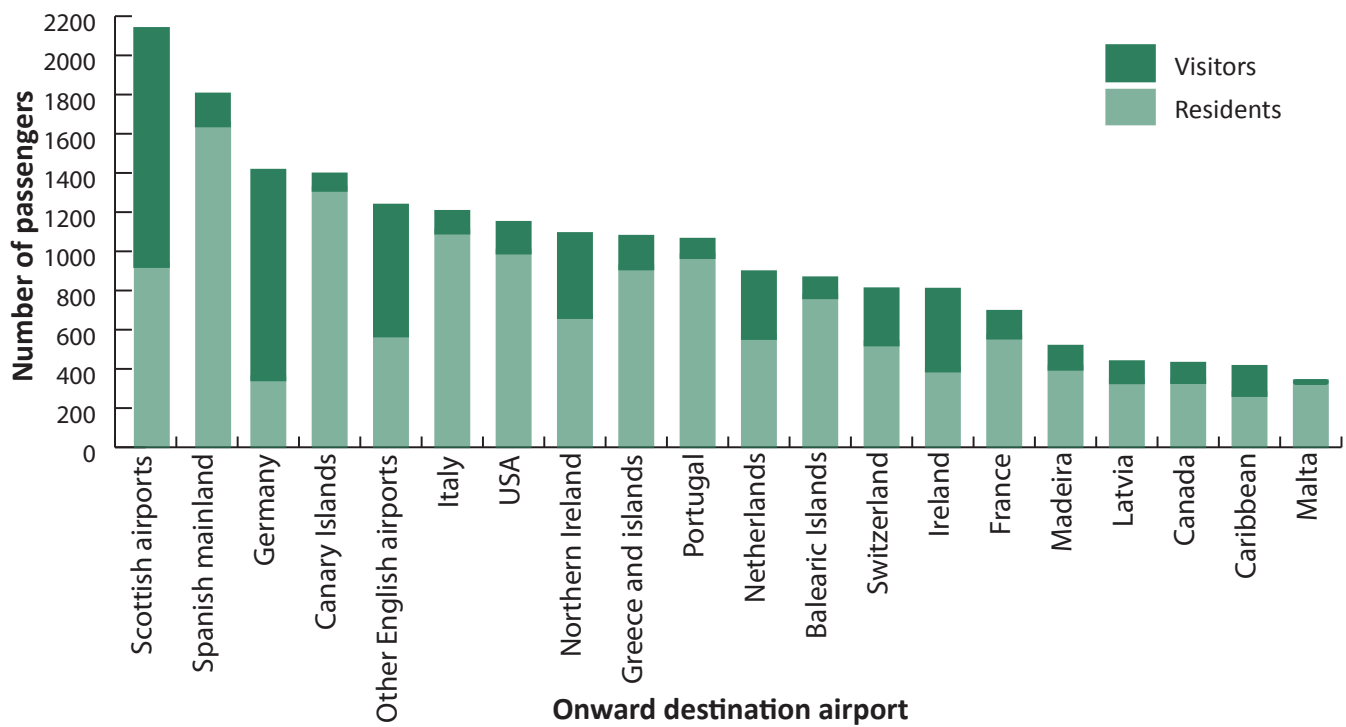
Initial destination airport	Visitor departures	Visitors travelling onward	Resident departures	Residents travelling onward
Birmingham	3,050	750	1,050	250
Bristol	2,250	0	950	50
East Midlands	3,050	0	700	0
Exeter	2,400	100	1,500	200
London City	1,950	200	1,650	300
Gatwick	16,400	3,200	24,550	13,700
Manchester	5,450	150	2,650	500
Southampton	8,200	1,350	7,450	1,150
Stansted	2,800	200	800	450
Other UK airports	1,750	100	850	0
Jersey	4,150	700	8,700	600
Foreign airports	500	0	1,000	0
<b>Total</b>	<b>51,950</b>	<b>6,750</b>	<b>51,850</b>	<b>17,200</b>



## 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 airports in Scotland, followed by the Spanish mainland and Germany. 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

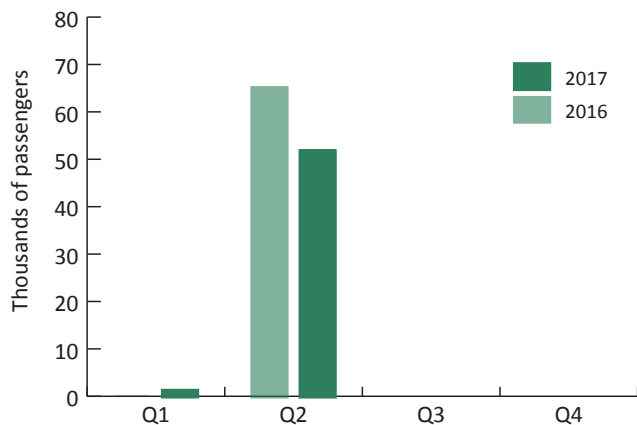
Guernsey Harbours collates information on the number of cruise ships and passengers visiting the island, depicted in **Table 6.1.1** and **Figure 6.1.1**.

In Q2 2017, the number of landed passengers decreased by 20% from Q2 2016.

**Table 6.1.1 Cruise ship and passenger numbers**

Month	2016		2017	
	Cruise ships	Landed cruise ship passengers	Cruise ships	Landed cruise ship passengers
<b>Total Q1</b>	0	0	1	1,100
<b>Apr</b>	10	13,130	7	8,300
<b>May</b>	25	29,130	19	26,440
<b>Jun</b>	16	22,710	15	16,950
<b>Total Q2</b>	<b>51</b>	<b>64,970</b>	<b>41</b>	<b>51,690</b>

**Figure 6.1.1 Cruise passenger numbers**

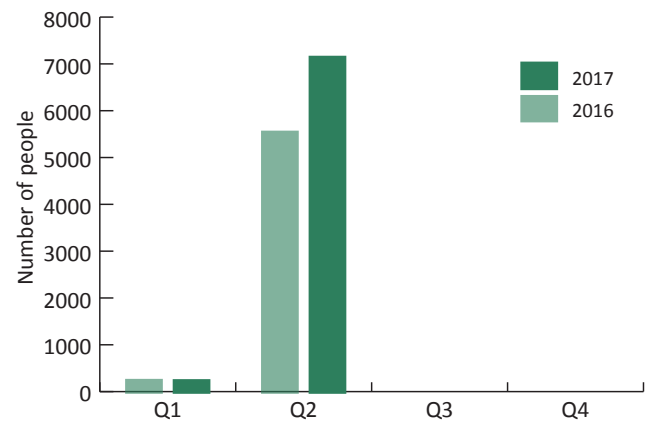


## 6.2 Visiting yachtsmen

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 Q2 2017, the number of yachtsmen increased by 29% from Q2 2016.

**Figure 6.2.1 Visiting yachtsmen**



**Table 6.2.1 Visiting yachtsmen**

	2016	2017	% change
Q1	225	219	-2.7
Q2	5527	7127	+28.9

## 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 Q2 2017 a total of 7,029 interviews were completed, which represented 15,572 passengers. This is 10% of the total number of passengers departing Guernsey during Q2 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](http://www.gov.gg/data). Please contact us for further information.

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For more information  
go to [gov.gg/data](http://gov.gg/data)