



Island Global Research

# Visit Guernsey

## 2015 Guernsey Cruise Market Survey

October 2015

Island Global Research is the trading name of Island Global Research Limited  
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## BACKGROUND

In May 2015, the Commerce & Employment Department commissioned Island Global Research to assess the economic value of the Cruise market to the Island in 2015. Similar research had not been undertaken for a number of years and, during this period, much had changed in the cruise market in terms of its passenger profile and numbers, size of cruise ship, and overall on-board experience and facilities. In addition, world economic conditions had altered and these had had a bearing on the tourism market in general.

The commencement of the research at the beginning of June did allow a period of a month or so for the new disembarkation and embarkation facilities on the Albert Pier to 'bed in'. This negated any possible distortion of the results due to inexperience in the shore handling operation as a result of not being used to the new location.

## METHODOLOGY

The research approach taken was split into two elements.

### First Element

The first element of research was to carry out face-to-face exit interviews between the beginning of June and end of September. This comprised a representative sample of over 1,000 cruise passengers and crew to ascertain their views and opinions on the island, and to find out how much they spent during their visit ashore. Great care was taken to ensure that the sample was drawn from a range of different ships (brand, size, etc.) arriving both during the week and at weekends.

Overall cruise passenger numbers in 2015 has been estimated to be 185,000 of which 122,700 (66%) came ashore in Guernsey.

It should be highlighted that while 1,000 interviews were held, these interviews covered 2,500 passengers. The degree of statistical error achieved was +/-3%.

### Second Element

The second element of research involved carrying out interviews (face-to-face and online) with a wide range of businesses which had direct/indirect involvement in the local cruise market in terms of the provision of products and services. In all, just under 100 businesses contributed to the research including both public and private sector attractions.

The Island Global Research team also took the opportunity of making its own observations with regard to shore facilities and passenger reception during the four months' research programme.

### Support

Finally, Island Global Research would like to thank all those who took part in the surveys and, particularly, the team of shore-based handling staff who gave every assistance to the fieldworkers during their research work.

## FINDINGS SECTION 1 - CRUISE LINER PASSENGER EXIT SURVEY

### RESPONDENT PROFILE

The respondent profile (1,000) in terms of age, gender, nationality and party size was recorded as follows (Figures 1 to 5):

Some general observations were as follows:

- The majority of cruise passengers landing in Guernsey were aged over 50. This is similar to overall industry averages. (According to 2014 research undertaken by ABTA, the average age of cruise passengers is currently at its highest ever at 56. However, the overall trend indicates a broadening age demographic.)
- The vast majority of passengers comprised parties of two people.
- Two out of three passengers were from the UK. However, one in five were from North America
- On average, passengers stayed ashore for around half a day.

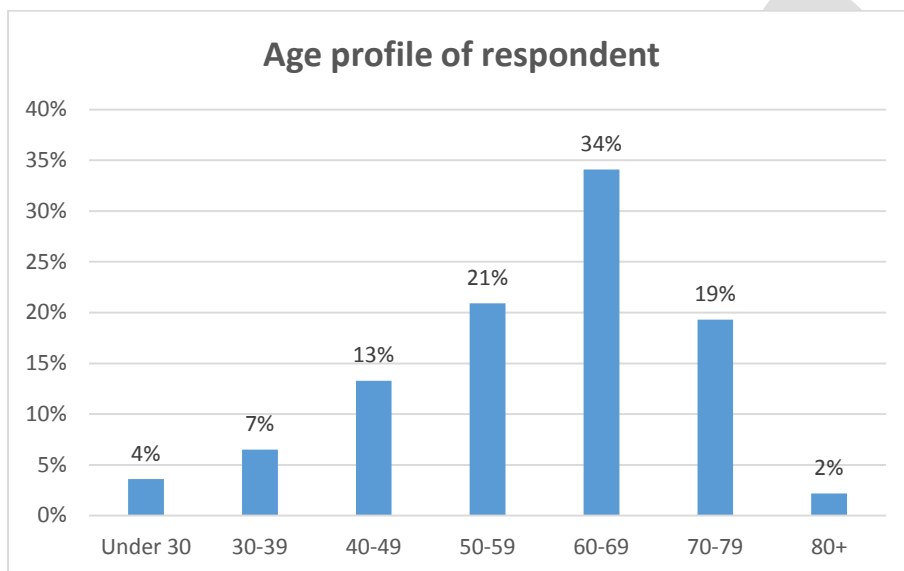


Figure 1

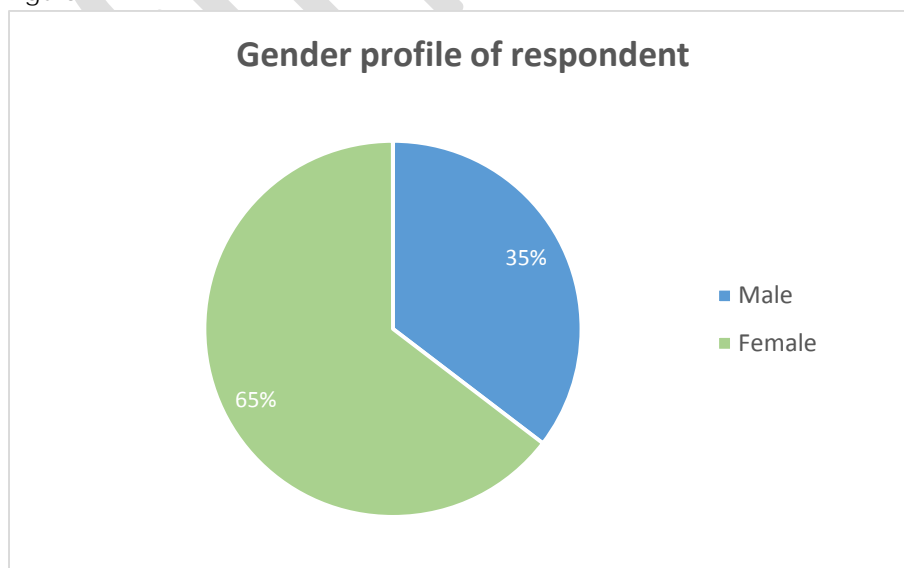


Figure 2

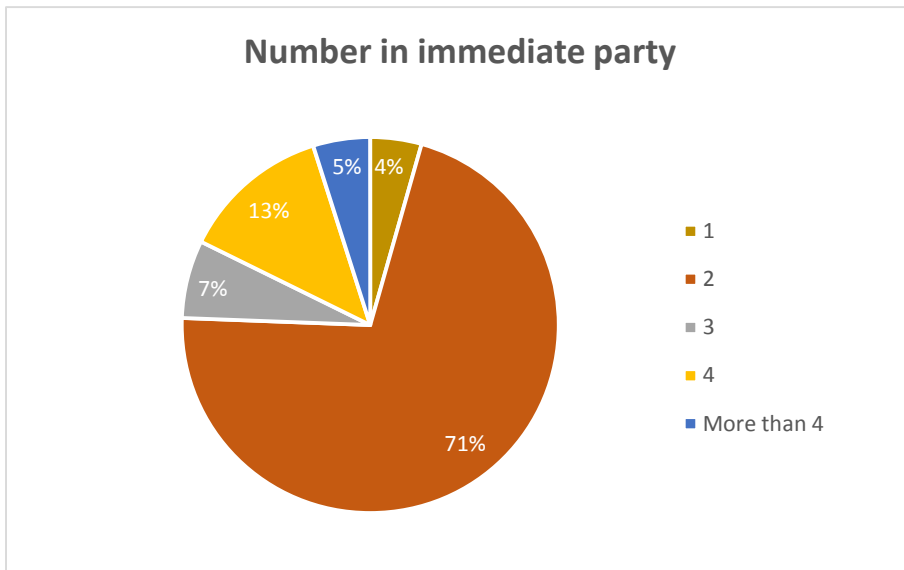


Figure 3

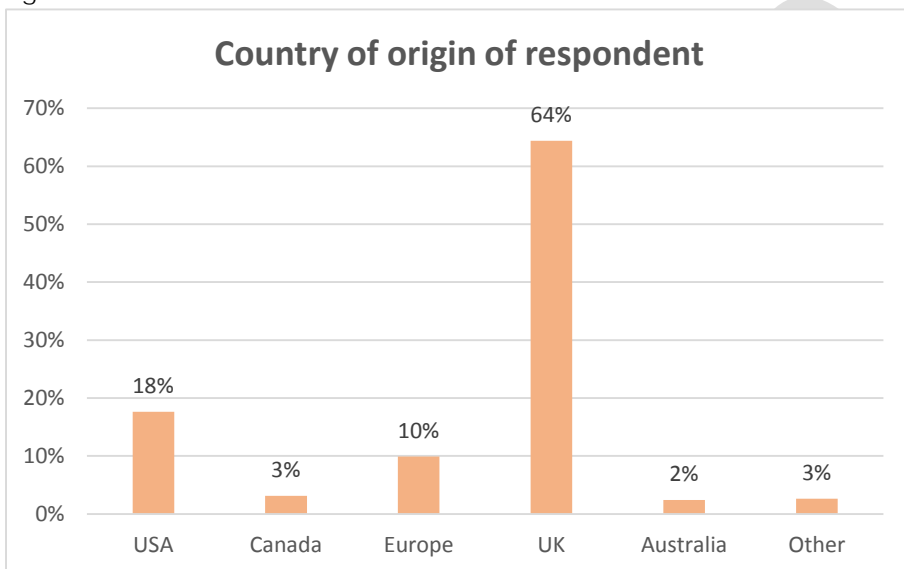


Figure 4

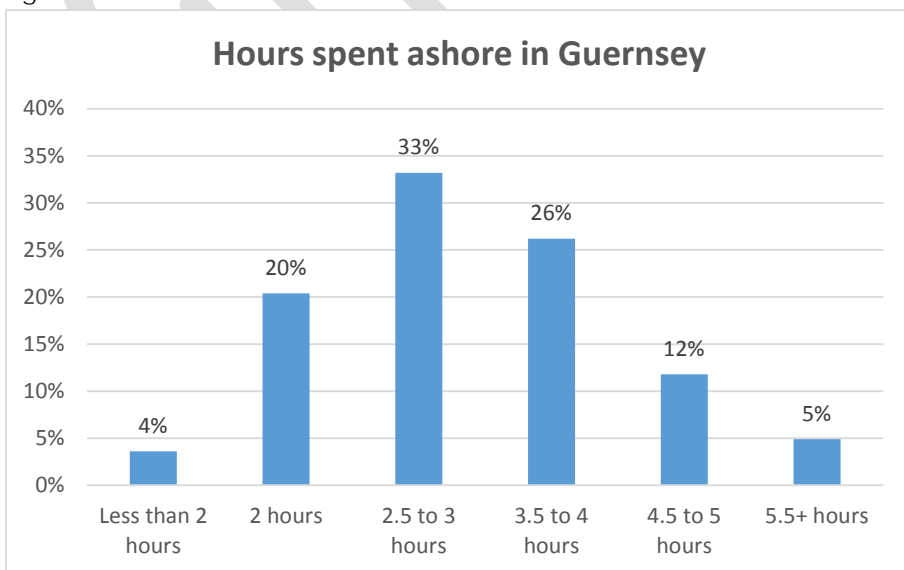


Figure 5

Over half of all passengers indicated that they specifically did some shopping whilst ashore. A similar percentage stated that they visited a bar, café or restaurant during their stay. Two out of five respondents said that they had generally browsed (Figure 6).

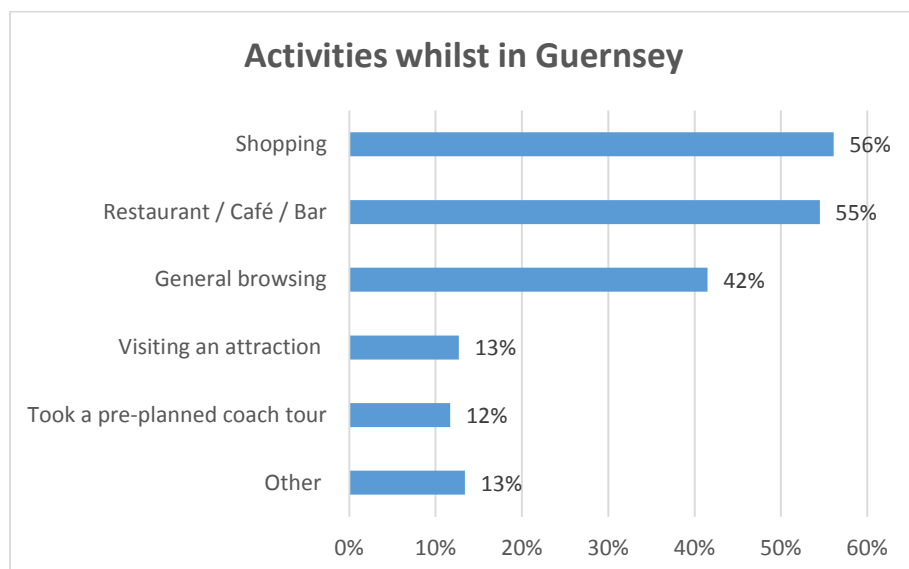


Figure 6

Some answers specified under "other" include:

- Cycle tour
- French Market
- Guernsey flowers
- Herm trip
- Hiring a car
- Using the local bus service
- Own walking tour
- Private Taxi Tour
- Rib Ride
- Visiting the Town Church
- Walking

In terms of items purchased, virtually all respondents stated that they had bought food and drink while in the Island. 38% said that they had bought souvenirs and 30% indicated that they purchased clothing items (Figure 7).

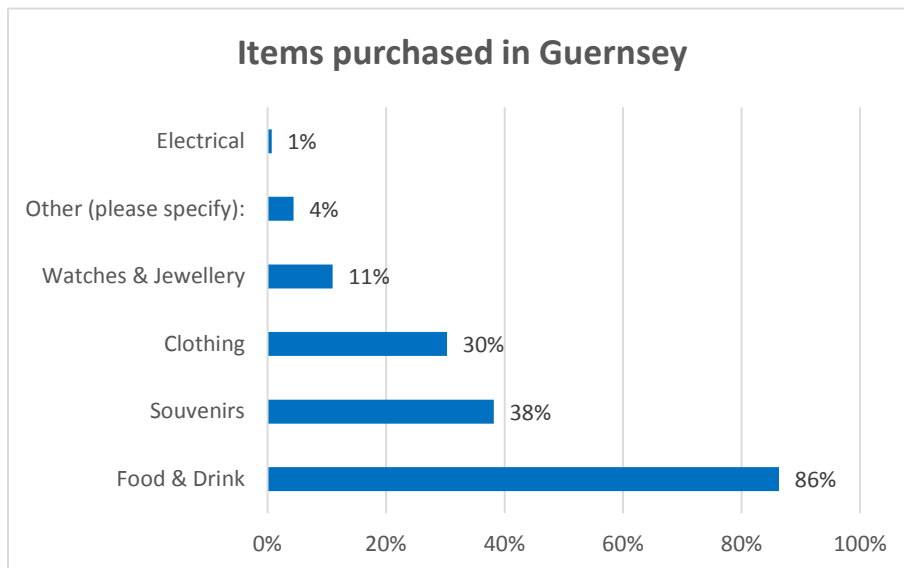


Figure 7

Figures 8 to 14 set out the level of spending per head on different activities and services. It should be noted that many passengers going on tours or visiting attractions pre-book and pay for such tours before they land on the Island.

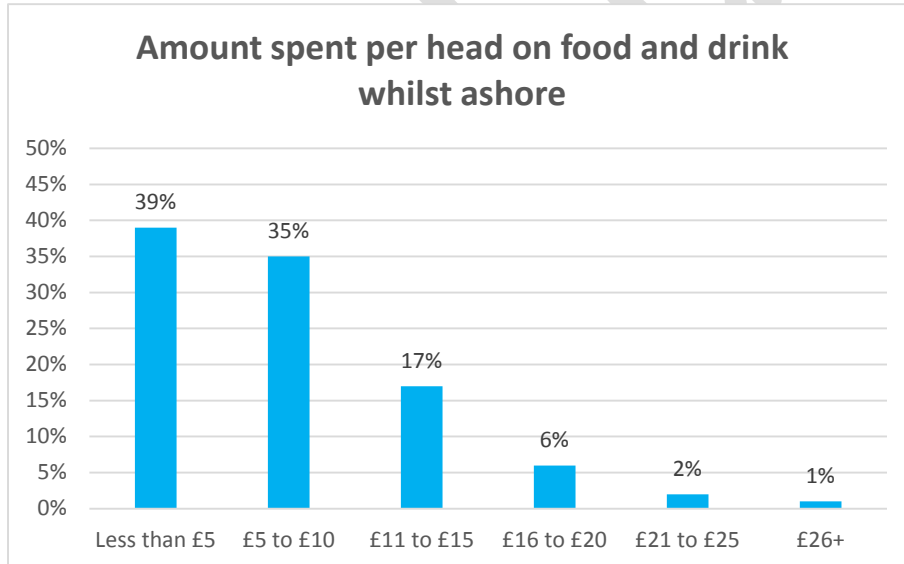


Figure 8

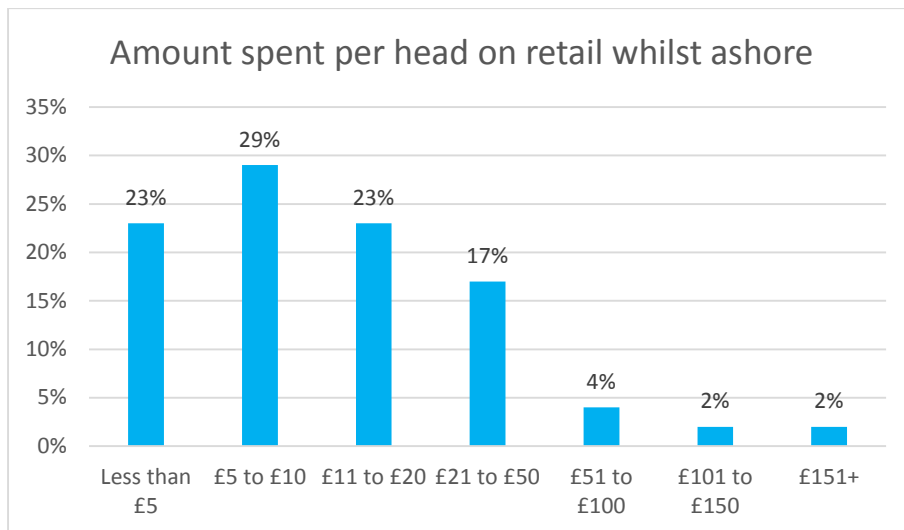


Figure 9

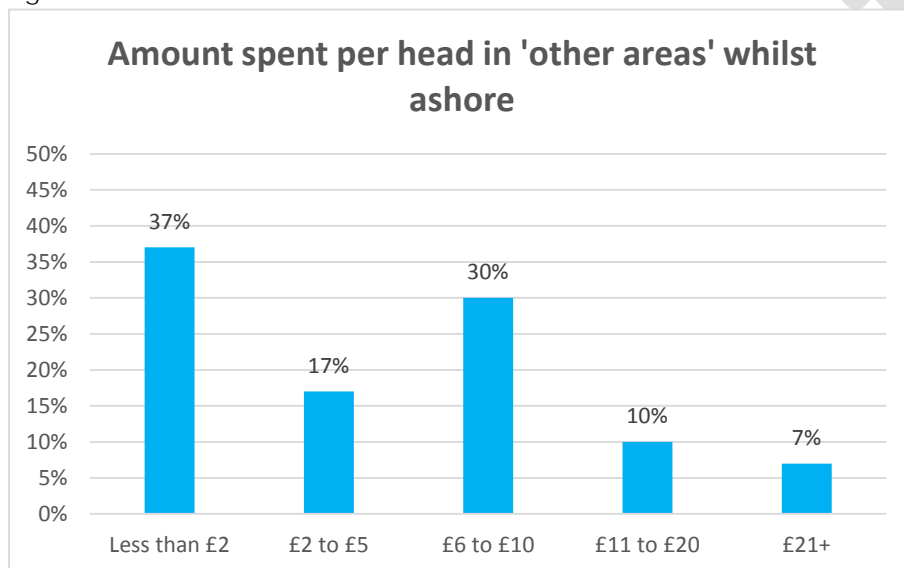


Figure 10

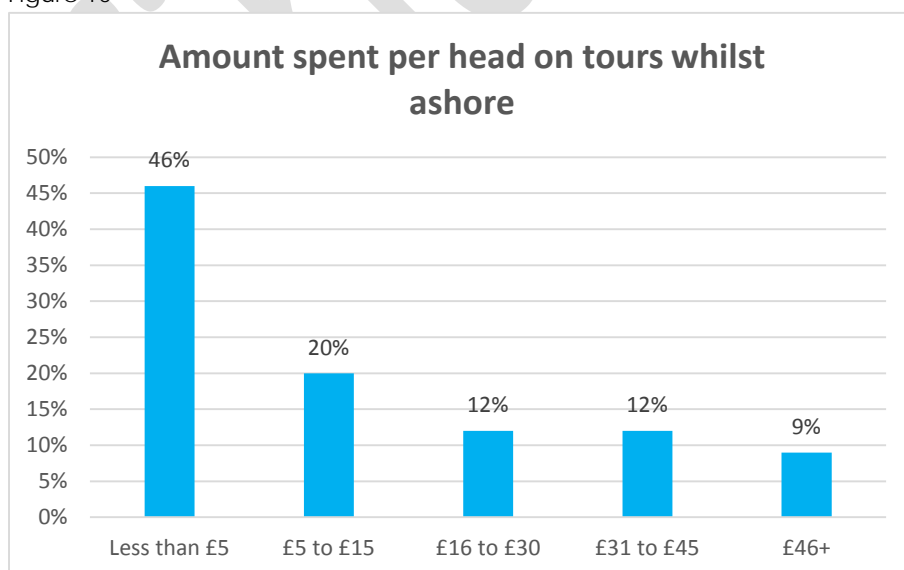


Figure 11

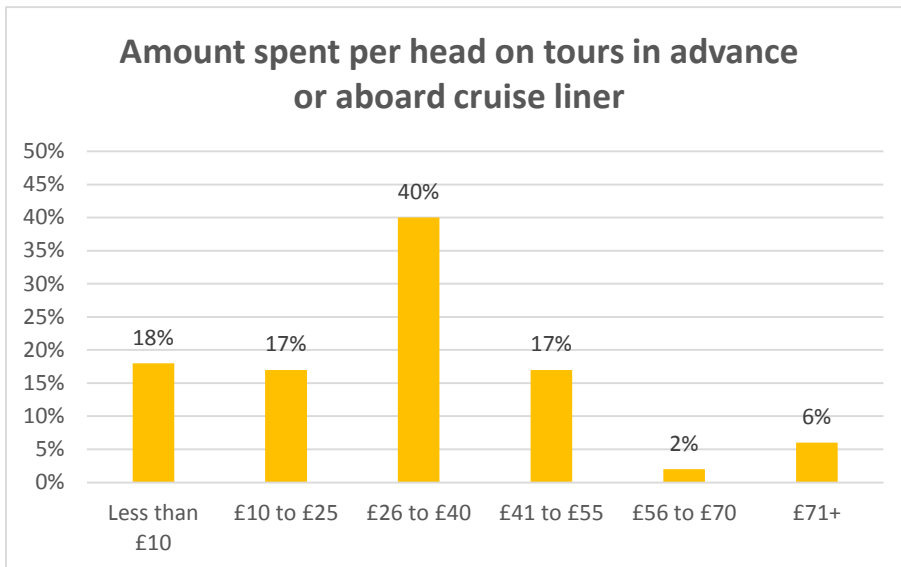


Figure 12

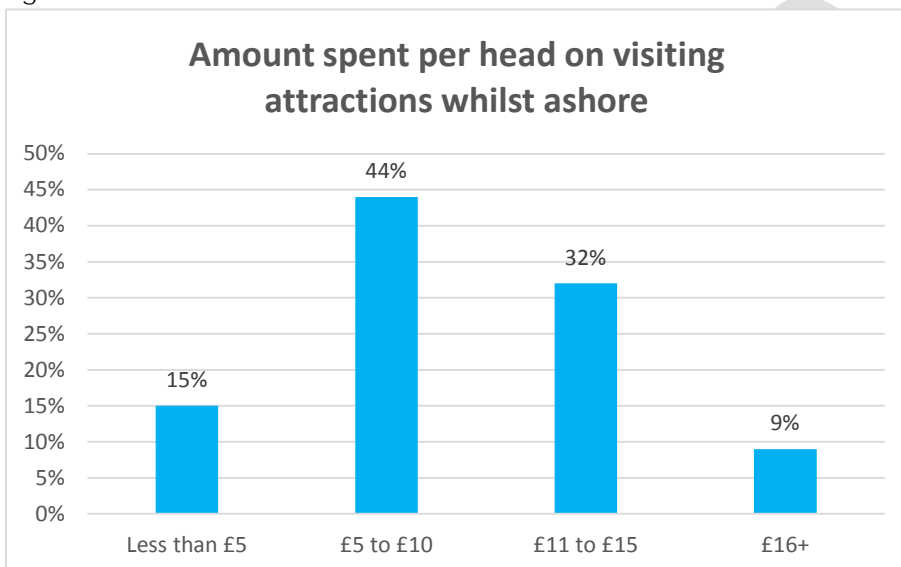


Figure 13

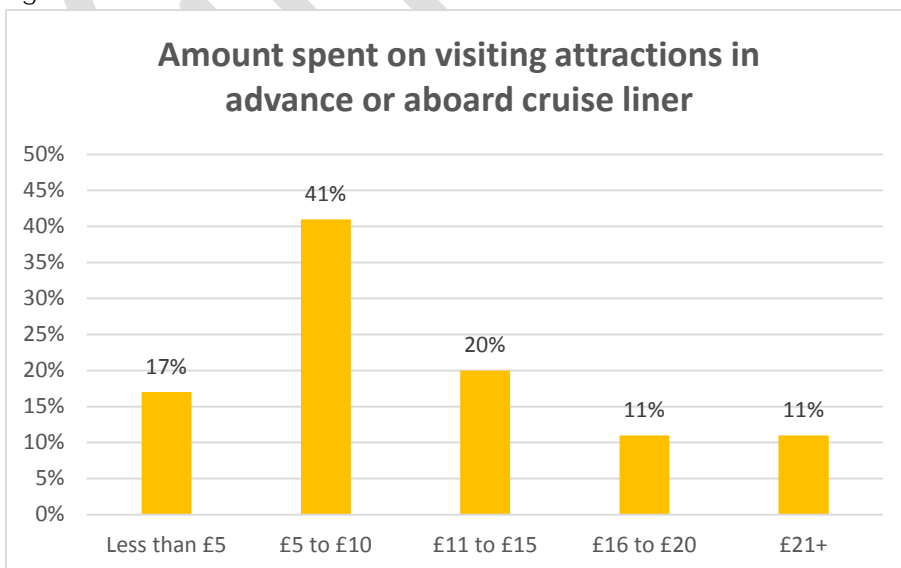


Figure 14



Figure 15 shows the total spend on each category of goods or services. This is calculated by multiplying the number of passengers purchasing something within each category by its average spend per head. By combining the total spend from each category of goods and services and dividing this number by the total number of passengers, it can be calculated that the average spend per cruise liner passenger in Guernsey is £32.

It should be noted that in calculating these figures, the average spend per head on-island was used, rather than the average spend per head in advance of visiting Guernsey.

	Passengers purchasing (%)	Passengers purchasing Number	Average spend per head (£)	Total spend 2015 (£m)
Tours	12	14,724	15.62	0.23
Retail	56	68,712	24.85	1.71
Attractions	13	15,951	10.05	0.16
Food & Drink	86	105,522	15.94	1.68
Other	13	15,951	8.12	0.13
<b>Total (£)</b>				<b>3.91</b>

Figure 15

Based on the actual number of passengers coming ashore in Guernsey (122,700), it is therefore estimated that, overall, cruise passengers spent **£3.91million** in the Island during 2015.

According to the Cruise Lines International Association, the 2014 average spend per cruise passenger in Europe was €62 (approx. £46) at each port on his/her cruise itinerary. However, the length of time that passengers were ashore in European destinations was generally much longer than in Guernsey with many all day tours etc. and some overnight stays in on-shore accommodation.

It was noted that due to the time that cruise liners were moored in Guernsey waters, very few crew came ashore.

Four out of five passengers indicated that they were very likely to visit Guernsey again in the near future (Figure 16) with the overwhelming majority stating that were highly likely to recommend Guernsey to a friend/relative as a place to visit (Figure 17).

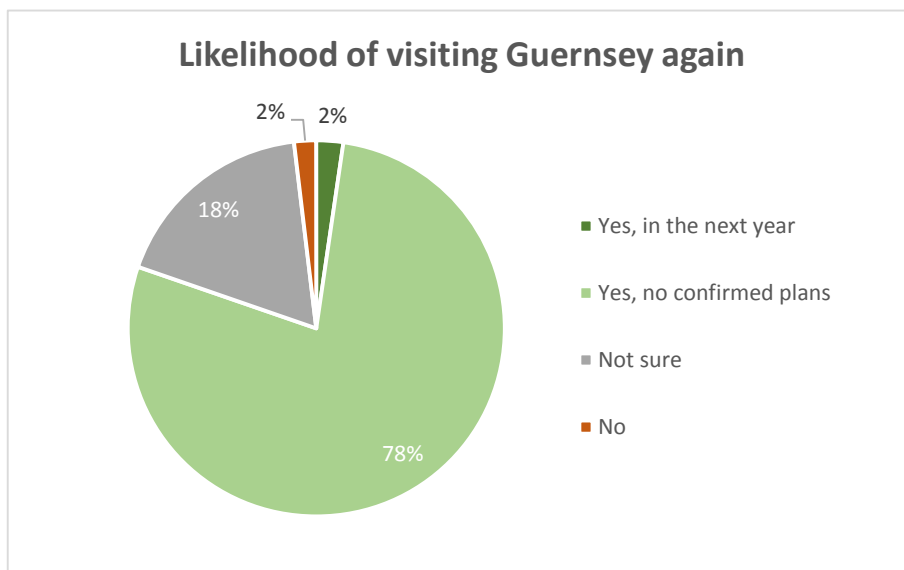


Figure 16

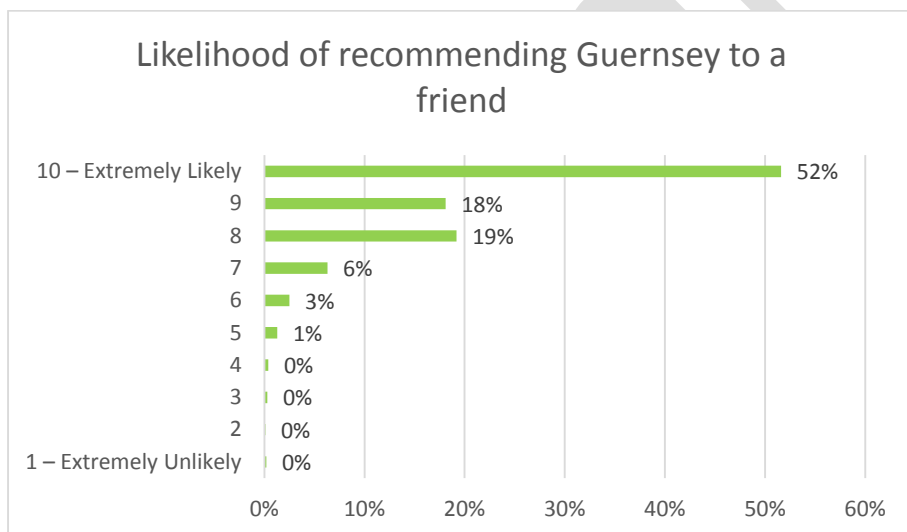


Figure 17

Respondents were asked to rate Guernsey from 1 to 5 in a number of areas (with 1 = very poor and 5 = excellent). Figure 19 shows Guernsey’s average rating in each area.

Area of Interest	Rating out of 5 (5 = excellent, 1 = very poor)
Restaurants	4.6
Shops / Retail	4.6
Attractions	4.7
Cleanliness	4.8
Guernsey in General	4.9

Figure 18

In an analysis of other comments made by passengers, the following were the most commonly mentioned:

- Lovely people
- Lovely place
- Beautiful flowers
- Shame more shops are not open on a Sunday. (Of those respondents whose cruise visited the Island on a Sunday, 30% expressed disappointment that shops were not open.)
- Not enough time on the Island
- Would like to return to the island
- Receiving Guernsey currency as change was inconvenient.
- Local bus service is infrequent, people have to queue for a long time.



(Long queues for the 91/92 bus route)

## FINDINGS SECTION 2 - REVENUE IMPACT SURVEY

Island Global Research also carried out a survey regarding the impact of the cruise liner industry on Guernsey Businesses. The following charts provide a profile of the businesses which responded (figure 19) and their opening times, along with data on how they each are impacted by cruise liners visiting the island.

Some general observations were as follows:

- The majority of businesses indicated that cruise liner visitors (both passengers and crew) were either important or very important to their operation.
- The main products sold to island visitors were souvenirs and food and drink.
- Almost all businesses received some turnover from island visitors, with a large majority indicating that this figure was more than 20%. Just under half of businesses attributed more than 10% of this to the cruise liner visitor market.

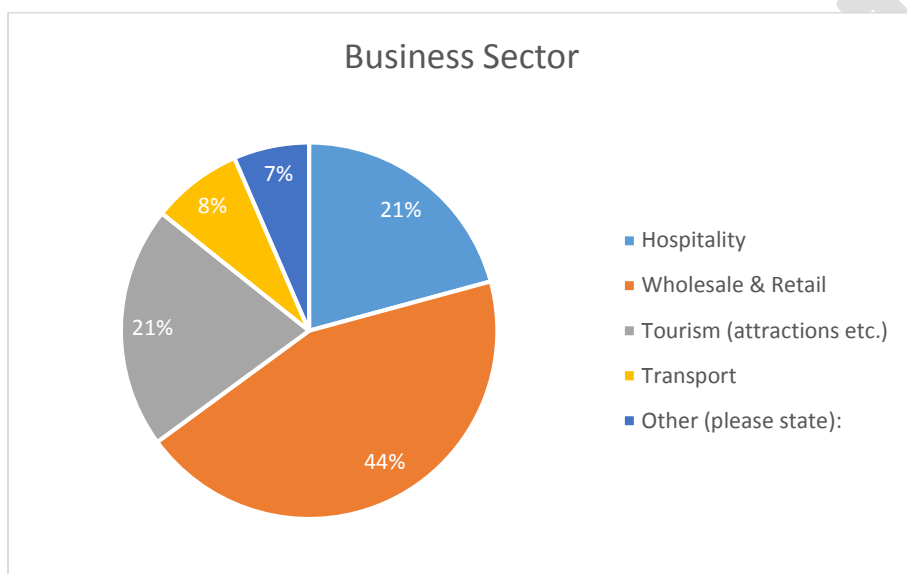


Figure 19

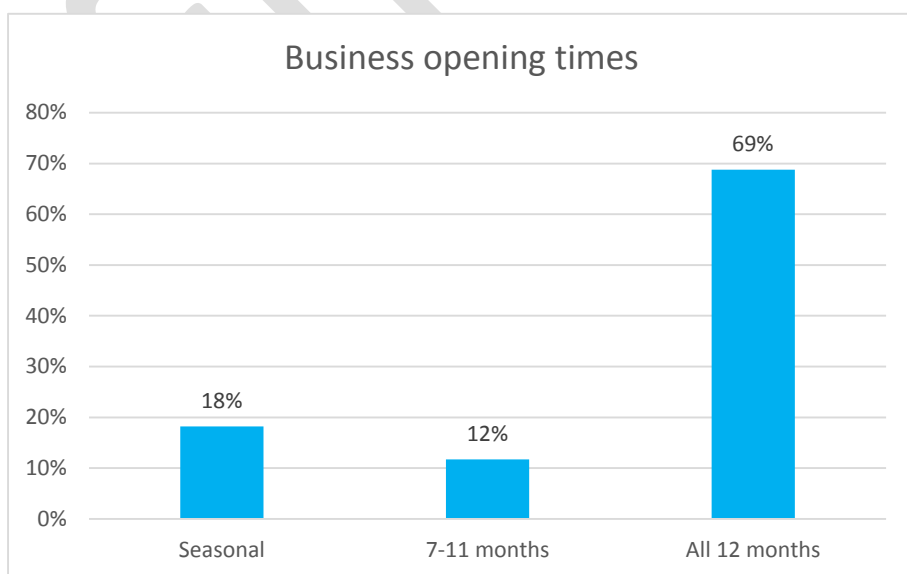


Figure 20

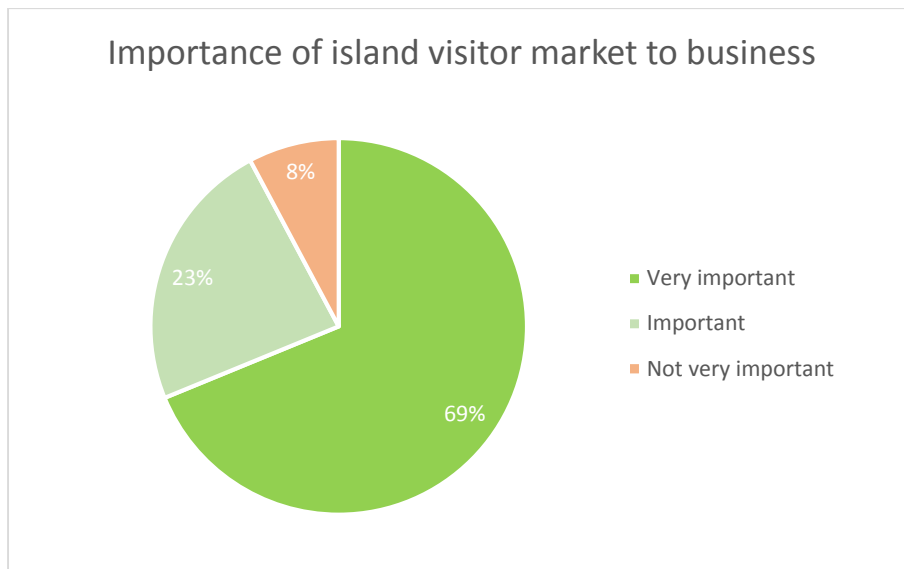


Figure 21 (Not important at all = 0%)

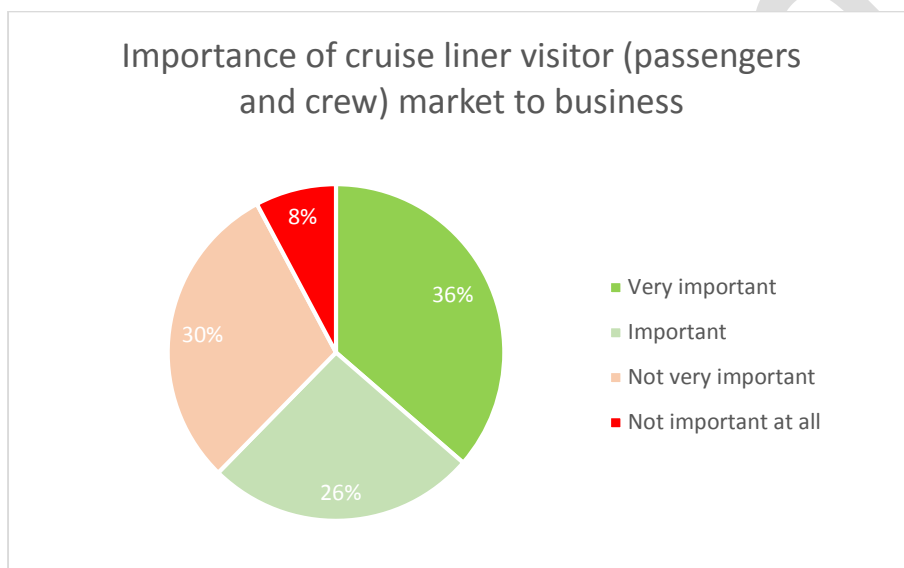


Figure 22

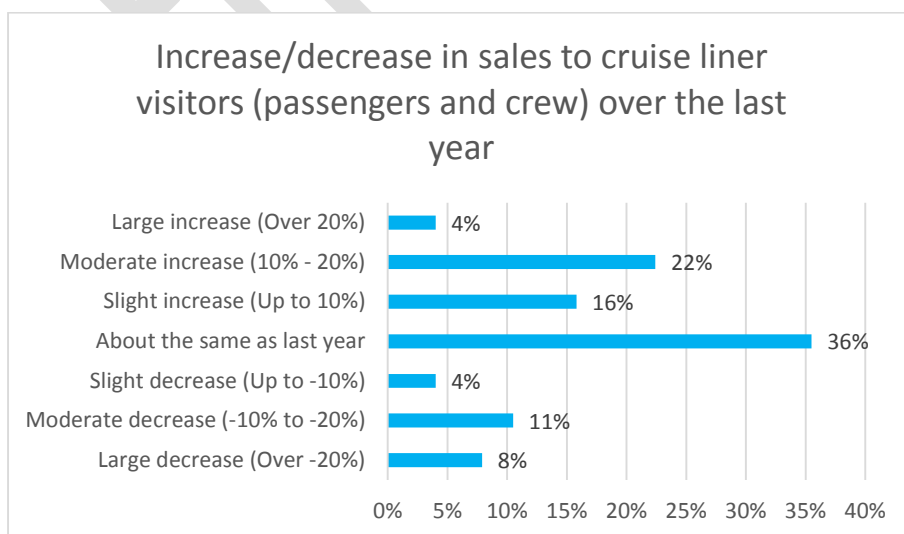


Figure 23

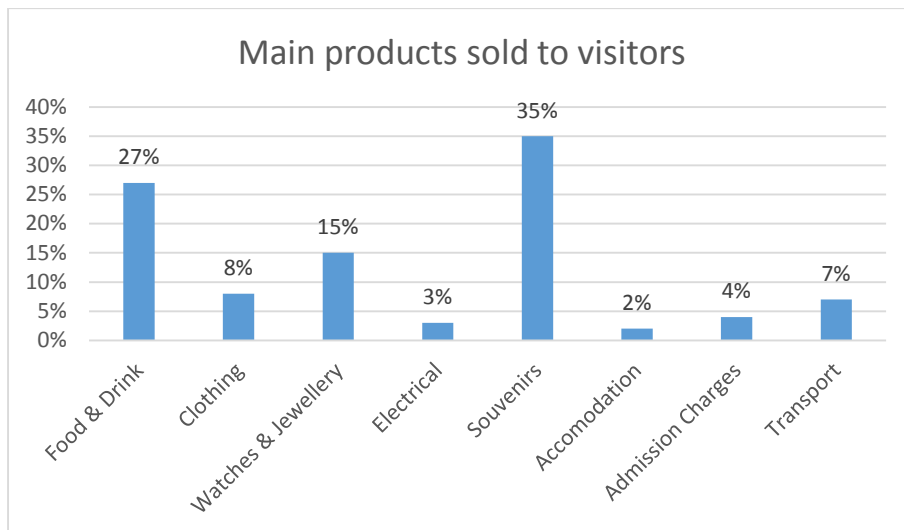


Figure 24

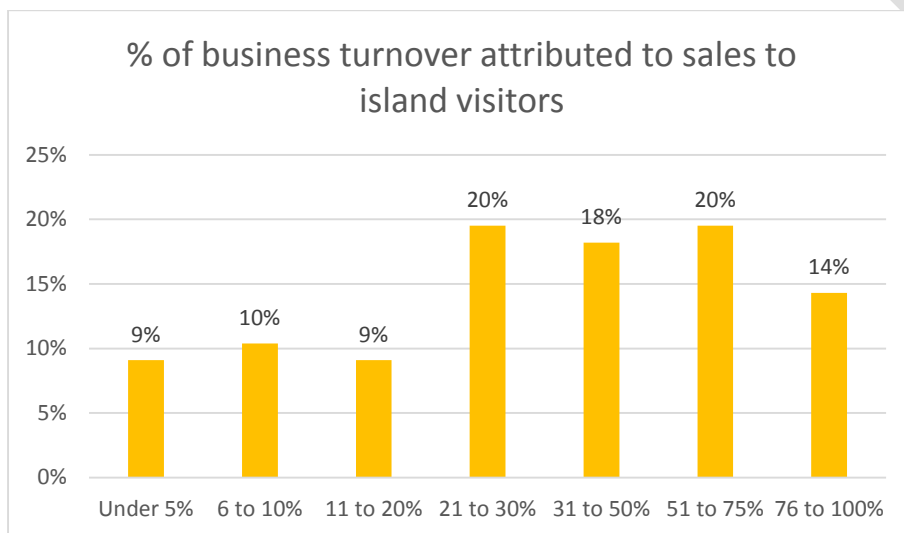


Figure 25

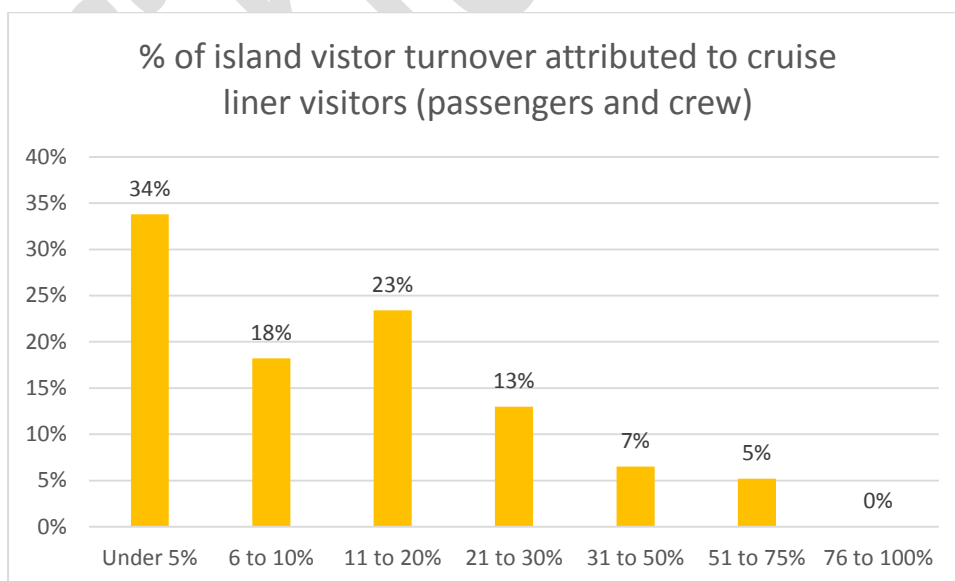


Figure 26

## SAMPLE OF OPEN TEXT COMMENTS

- Open Sunday's for cruise ships and tend to be busier when ship is on way back to Southampton.
- Hopefully the States will improve the visitor and cruise ship experience. If Jersey builds an all year around jetty there will be no way back for Guernsey as Jersey has taken most of the air traffic business including substantial lower seat prices. The constant bickering in the States is having a detrimental effect on the island and we are currently left with a single economy that's 100% reliant on financial services and I cannot see tourism improving until the states make a firm commitment as without this important sector the island will not prosper and within a few years the population will have dropped from current levels leaving Guernsey a backwater. On a personal note if I was starting out again I would not spend a considerable sum on buying and opening large premises in the current climate as I would not see a return on my investment. The cruise ship business is improving each year but the general visitor economy is still in decline.
- Cruise liner tours to Sark which all include a visit to us are an increasingly important source of income.
- I like the feel of St Peter Port when it is bustling with visitors and receive many positive comments from many cruise ship passengers that they would like to return to really see the island - generally though this is the European/British cruise passengers - Americans/Asian just want to take photographs and get freebies!
- Without the cruise liner business we would go bankrupt.
- Having just one lane of traffic on the Seafront has stopped locals coming into Town. They can park but it takes too long to get into town and move along the front.
- We lost a number of tour operators recently as they have stated an unwillingness to visit sites that charge admission and would prefer to use only free entry attractions.
- Most passengers appear to go straight to bus tours etc.
- I think returning visitors to the island and those which stay for longer periods of time have a far more positive impact on the island than cruise ship passengers. I am sure they spend more money in the shops and restaurants and on transport, entertainment and accommodation, and this is the area of tourism we should be focusing on.
- Although I think the cruise liner business is an excellent showcase for the Island, it doesn't have a great impact on my business.
- As a result of the changes to the arrangements for cruise liner passengers and the town front we have observed the following: 1. Cruise liner passengers given less information about shops, restaurants and facilities the town has to offer. 2. Daily traffic jams along the front at lunchtime and 5pm, 20- 30 mins to exit North Beach, longer on Cruise liner days 3. Large reduction in numbers of Locals visiting the town to shop as a result of the traffic congestion along the front 4. Only locals who work in town will shop on Cruise liner days, all others now stay away. 5. 75% reduction in Cruise Liner passenger spend this year 6. The above changes have accelerated the downward trend of the town.
- Increase in footfall, but only slight increase in money taken - generally 1 in 6 buy a fridge magnet or something small.
- The business would attract more cruise passenger/crew if outdoor seating was available. Unfortunately to apply for the permissions it is prohibitively expensive in the first year of trading at approximately £1600. A ridiculous figure for an AI fresco licence.
- We have seen an increase in organized tour group visits this year. We also noticed that the cancellation of 2 cruise ships in August negatively affected our takings for August. On days when a cruise ship is in up to 70% of the visitors to the Castle are from the ship.
- Odd souvenir only sold. Lots of locals not in this year because of volume visitors from cruise ships.
- We do not benefit too much but cruise ship passengers visiting have increased this year and this important for us.

- It really does not apply to my B&B business. But I have been working as a Shore Excursion coordinator in Sark for Sark Shipping for the past 5 years, and know that the cruise ship passengers are a good source of revenue to the Island, for the tractor bus drivers, who bring them to the top of the hill, the carriage drivers, La Seigneurie Gardens, and the shops and cafes in the village, not least the Ice cream seller at La Collinette, all of whom, with the possible exception of La Seigneurie Gardens probably have not been included in this survey.
- The cruise business is very important to Guernsey and I am very concerned it will be lost to Jersey. I understand they are considering building a deep water berth and as Jersey already has most of the Channel Islands airline business with realistically price airline tickets, that we urgently need, I strongly feel if we lose this business Guernsey will become a backwater and the population will drop, thus having a knock on effect with a reduced tax take. I would like to invested several million in my business as past years have been good but with the lack of a firm visitor policy this will stay on hold until hopefully the states fully understand we cannot have just one business, as finance could quite easy be gone leaving nothing to help with the mass unemployment. Currently we keep having new policy's to improve the visitor situation but without firm results. On a personal note the cruise ship clients do spend very well at our premises and it's a growing business but the main visitor business is still in decline and I fully expect states tourism to rebuke these comments with plenty of spin. To date I have invested a considerable amount of time and money over the last 35 years having good returns but without changes and a firm commitment from the States this will not happen.
- Poor signage for visitors when they leave ship.
- Location move from High St to market appears to have increased footfall and spend. Market days although attractive do not increase spend
- Weather dependant, a few walkers for ice cream etc.
- When shop keepers comment that cruise liner passengers don't spend I have to disagree, and I think the island needs to think about the add on value of additional services.
- We regard cruise passengers as very important to us they are big buyers of local ice cream on sunny days and seafront Sundays.
- To provide a better service structure for the cruise liner passengers through investment on a long term basis where all the Channel Islands could benefit. As it is not easy for them to get to Jersey and the other Bailiwick islands then later on we could do a service where the Cruise ships could stay for a couple of days allowing the passengers to explore further afield and take the opportunity to visit the other islands. Working together so all the Channel Islands could benefit if we are the major destination in Europe.
- Tourist Board should be promoting market stalls and more communication.
- 1: Relocate the cruise passenger landing point back to the Inter Island Quay. This will direct the disembarking visitors to the proper pedestrian crossing at the Weighbridge, or walk around the pavement to the Crown Pier and also cross there safely in to Town which seems fine. 2: Return the town traffic system and parking arrangements back as they were, for the benefit of local shoppers, and the business community. Thank you for this opportunity to express my views.
- Tours are a great way to showcase the Island. Many visitors mention that they would be looking to return to the Island.
- The new docking arrangement for cruise passengers mean that rather than bringing incremental revenue from cruise passengers as in the past, it has displaced revenue from locals and on-island tourists who are avoiding town because of the difficulty in finding parking places and because of the congestion on roads in town and leading into town.
- It is good to see that this is being done before I took over this business I was under the impression that the cruise ships did not spend any money how wrong I was! I think the people of Guernsey do not understand the full impact of how much they pay to the island. The feedback we get from the visitors "we cannot believe that we got round the island on the bus for £2 so cheap". The road alterations they are happy with they tell us it good that they just come off the ship and



the bus terminus is right there! All towns are busy wherever you live all around the world. In London and various other small towns in UK the car numbers are no different we just have to manage it and learn. Just because there has not been many accidents in past on the crossing does not to say there will not be in the future it was a great idea to move it and manage it.

- Sunday opening list for cruise ship passengers
- I wish that the Cruise Liner Companies didn't rob their passengers! I am always disappointed to learn from passengers that have done their homework and purchased tickets directly from us at a standard fare of £12.50 that prices in the region of £50.00 + are being charged on the ship!
- Cruise passengers spend very little but when Cruise Liners are here the volume of local shoppers declines. This has been much more noticeable this year, presumably due to the re-location of the Cruise Passenger drop off point and the change of road layout, which has put people off coming to Town.
- My Gallery is removed from the island centre. Few cruise passengers have time to reach me and, if they are enjoying a carriage ride, it is not possible to stop at my location.
- The cruise market is very important to my business. If the cruise market was to stop I would seriously look to closing down my shop as there is not enough visitors to sustain a viable business.
- Passengers rarely buy anything of value ashore, everything is free on board food wise, and all goods are sold at lower than the island due to no EU/UK taxes applying. Our tourist industry is wrong, it should be long stay that we should attract more
- Cruise ship customers eat on board. Our coffee sales are slightly up. Our shop along front is busier for coffee/snacks.
- Very little purchased by liner passengers. Quite a few items shoplifted when shop full of liner passengers - unfortunately impossible to follow up thefts when caught on CCTV as there are many times when two liners are in Guernsey on same day and leaving mid-afternoon.
- Short stay parking impact keeping locals out of town. The cruise ship impact is definitely negative, Questioned Paul Paint director whole thing is a mess...
- Most customers from cruise ships know where they are going and head straight to attraction or bus round island limited impact on tills for us few coffees maybe ! .
- We are in Sark and via Sark Shipping Company many cruise liner people visit Sark. Sometimes the Cruise liners can carry 5,000 people but only 50 - 100 people are successfully sold the Sark excursion. Is this because it is too expensive? We see many cruise liner visitors who say they are charged from \$100 to \$160 for a visit to Sark. This visit often starts with a very early sailing say 8am from Guernsey then departing at 11.30am or 12pm from Sark back to Guernsey, which gives the poor visitors only a matter of several hours on Sark before they are herded (literally) back down the hill. We feel the poor cruise liner visitors are being ripped off as if they did their own deal directly it would only cost them £46 or less and they would not have to get up at 6am to be herded over to Sark and back for a mere two hours or so visit to the Island, this surely is completely obvious by the very low percentage of a ships complement that takes up the excursion!!
- Our turnover doubles when there is a cruise liner in
- The cruise ship business adds nothing in turnover and provides only an annoyance in terms of making the Town crowded and causing traffic problems etc. so if anything deters our normal customers from visiting
- Definite impact on local trade short term parking loss is major loss noticed more this year. More consultation with retail sector please. Locals go to other branches when cruise ships in been noted
- We strongly believe that the current tourism approach to cruise liner visitors does not show off the islands best attractions at all. Alongside this we feel that any businesses located outside of St Peter Port are not given an opportunity to engage with the cruise line visitors. We have a small returning customer base from the cruise liners but each time those passengers have independently sought us out. Guernsey Tourism should be offering a more diverse and flexible

approach to enable passengers to see an increased variety of the natural beauty, history, local craft and culinary excellence that Guernsey is really all about.

- The cruise liner market represents 35% of our coach hire income. If there was a significant decrease in the cruise liner market, it would impact significantly on our coach operations. Also it is difficult to quantify is repeat business. Our drivers report anecdotally that passengers enjoy their coach tours so much that they intend to return to the island for a longer visit.

14 October 2015

final draft