

Guernsey Visitor Spend Survey Report

April 2019 to March 2020

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The Guernsey Visitor Spend Survey Report shows the total expenditure of visitors to the Island of Guernsey, based upon exit surveys undertaken at the airport and harbour between April 2019 and March 2020



States of Guernsey
Data and Analysis

1.1 Introduction

This Guernsey Visitor Spend Survey Report is based upon exit surveys undertaken at the airport and harbour covering a twelve-month period, between April 2019 and March 2020. The results from the first six months were published in 2019 and are available here: guernseytrademedia.com/facts-figures. However, the analysis of the second six months was postponed due to re-prioritisation of work during the coronavirus pandemic. Analysis was completed in 2023, following demand for the information and to enable comparisons to be made when the research is repeated in future.

On 19th March 2020, it was announced that every person arriving in Guernsey from outside of the Bailiwick would by law have to self-isolate for 14 days due to the coronavirus pandemic and only essential travel was permitted. As a result, the last exit surveys relating to visitor spend took place on 15th March 2020.

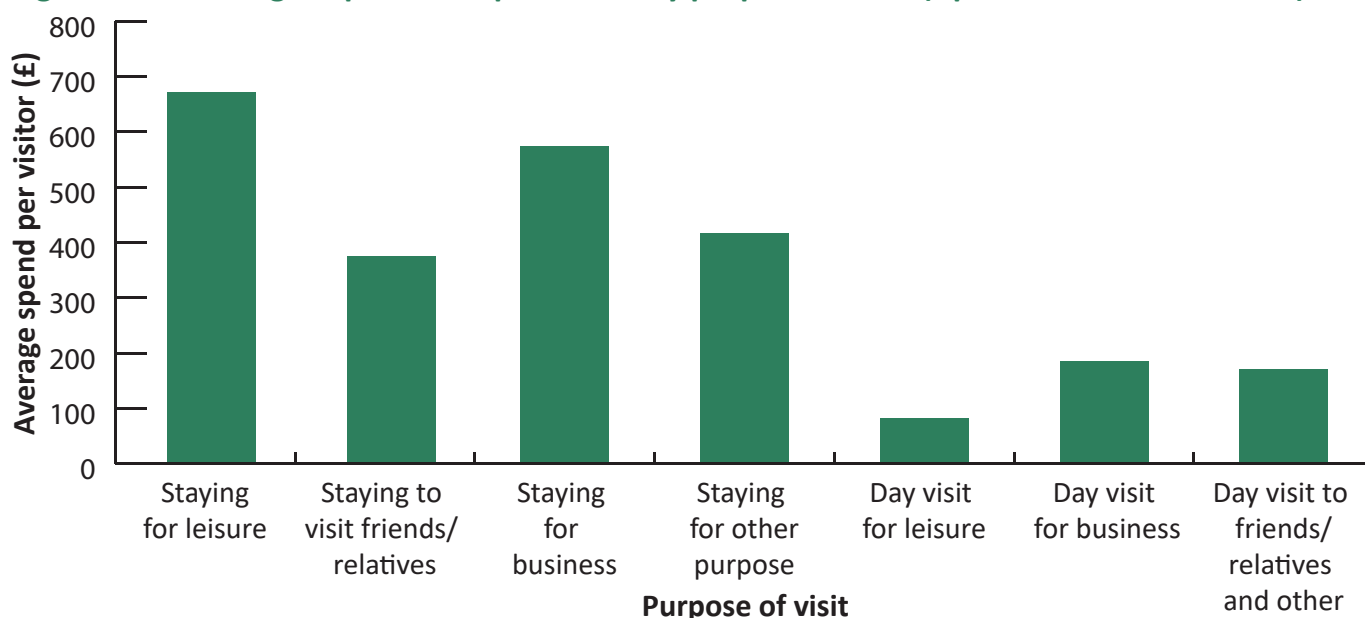
The purpose of the Survey is to determine how much visitors to Guernsey spend when they visit and to help identify the spending profile of the visitors by purpose of visit, country of residence and mode of transport. The Survey does not cover visitors arriving via cruise ships, yachts or private planes. As such, the term "visitors" in this report should be read to mean all visitors that did not arrive by cruise ship, yacht or private plane. Visitors from cruise ships are asked to complete a different survey, the results of which are published in the annual **Guernsey Cruise Visitor Exit Survey Report**, also available here: guernseytrademedia.com/facts-figures.

A sample of visitors departing by aeroplane or ferry were asked about how much they had spent on different categories of expenditure. This included package deals, travel to and from Guernsey, accommodation whilst in the island, items at the airport and harbour, and spend on other activities such as eating out, entertainment and transport whilst in Guernsey.

The survey fieldwork was conducted by a team of surveyors employed by the States of Guernsey, with questionnaire design and sampling methodology managed by independent research agency, Island Ark. The analysis and this report were compiled by the States of Guernsey Data and Analysis Service.

1.2 Headlines

Figure 1.2.1 Average expenditure per visitor by purpose of visit (April 2019 to March 2020)



1.2 Headlines (continued)

- The average spend in Guernsey per visitor was £511 for those that departed by aeroplane or ferry during the twelve months from April 2019 to March 2020. This includes spend on travel to and from Guernsey, spend on accommodation or package deals (depending on how the trip was booked), items purchased at the airport and harbour and spend on other activities such as eating out, entertainment, transport whilst on the island and the amount spent on other goods purchased in retail establishments.
- 272,460 visitors departed by aeroplane or ferry between April 2019 and March 2020, giving a total estimated expenditure of £139 million. More detailed information on the number of visitors departing by aeroplane or ferry in 2019 and 2020 can be found in the **Guernsey Travel Survey Reports**, which are available from guernseytrademedia.com/facts-figures.
- Visitors staying for at least one night for leisure purposes contributed £100 million to the total expenditure (72%). Visitors staying for at least one night to see friends and/or relatives and business visitors staying for at least one night contributed £21 million and £12 million respectively.
- Visitors from the UK (which made up 72% of the total) contributed the largest portion of the total spend (75%, equating to £105 million). Visitors from France and Jersey contributed 4% and 3% of the total spend respectively.
- 72% of the total spend came from visitors travelling by aeroplane and 28% from those travelling by ferry.
- The average spend in Guernsey per cruise visitor was £34 and 115,243 cruise visitors came ashore in Guernsey in 2019. As such, the total estimated spend in Guernsey of cruise visitors in 2019 was £3.9 million. See the **Guernsey Cruise Visitor Exit Survey Report** available here: guernseytrademedia.com/facts-figures for further information.
- The combined total expenditure of visitors to Guernsey between April 2019 and March 2020 was £142.9 million (this excludes those who arrived by yacht or private plane).

2.1 Expenditure by mode of transport

Table 2.1.1 shows the average spend per visitor departing by aeroplane or ferry broken down by mode of transport.

The overall value is estimated by calculating the average spend per visitor departing by aeroplane or ferry for visitors travelling by air and visitors travelling by sea and then multiplying up by the total number of departing visitors travelling by air and sea. The average spend per visitor includes spending on travel, accommodation or package deals, depending on how their visit was booked, and any other spending whilst on the island.

Table 2.1.1 and **Figure 2.1.1** show that visitors travelling by air contributed 72% (£99 million) of the total spend whereas visitors travelling by sea made up 28% (£39 million) of the total (£139 million).

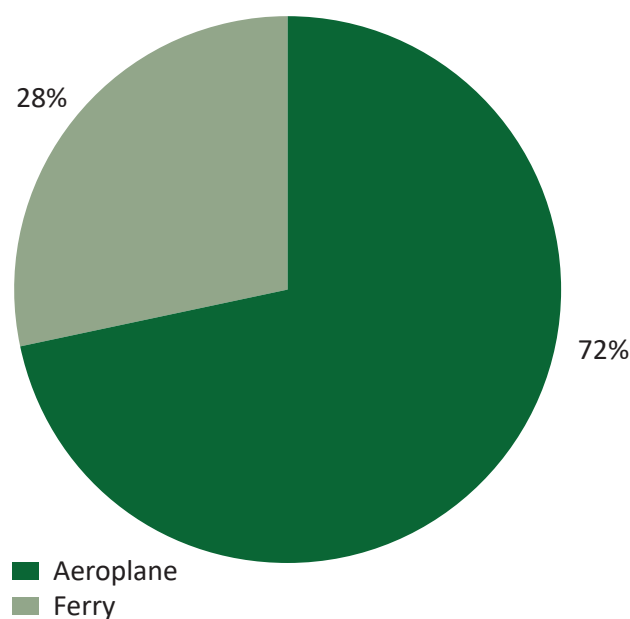
The average expenditure of those travelling by aeroplane was £555, compared with £421 for those travelling by ferry. More information on differences in the composition of visitors departing by aeroplane and ferry in 2019 and 2020 can be found in the **Guernsey Travel Survey Reports**, which are available from guernseytrademedia.com/facts-figures.

Table 2.1.1 Expenditure by mode of transport

	Average spend per visitor (£)	Overall value (£m)	% of total spend
Aeroplane	555	99	72
Ferry	421	39	28
Total	511	139	100

NB. Figures may not sum to the total due to rounding

Figure 2.1.1 Proportion of total spend by mode of transport



3.1 Expenditure by purpose of visit

Table 3.1.1 Expenditure by purpose of visit

	Average spend per visitor (£)	Overall value (£m)	% of total spend
Leisure visitors	578	102	73
Visiting friends/relatives	368	21	15
Business visitors	417	14	10
All other visitors	325	2	1

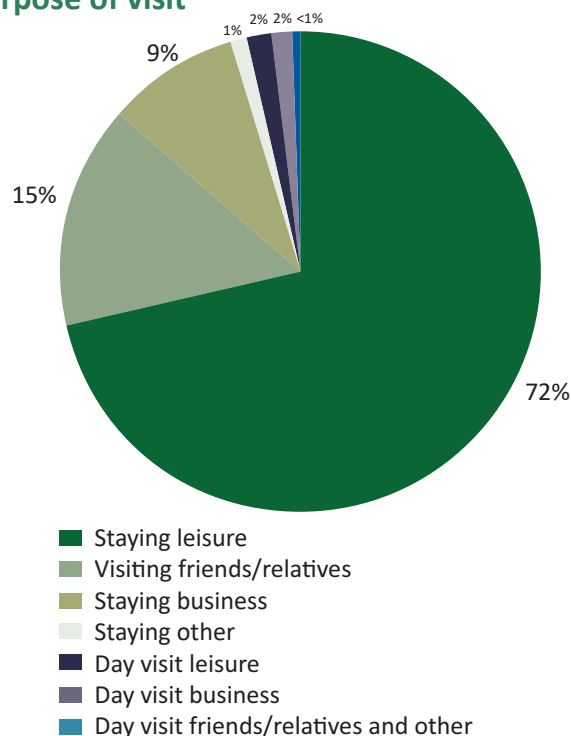
NB. Figures may not sum to the total due to rounding

Table 3.1.2 Expenditure by purpose of visit

	Average spend per visitor (£)	Overall value (£m)	% of total spend
Staying leisure	669	100	72
Staying to visit friends/relatives	372	21	15
Staying business	571	12	9
Staying other	413	2	1
Day visit leisure	79	2	2
Day visit business	182	2	2
Day visit friends/relatives and other	168	1	<1

NB. Figures may not sum to the total due to rounding

Figure 3.1.1 Proportion of total spend by purpose of visit



As seen in [Table 2.1.1](#) on [page 4](#), the average total spend of visitors departing Guernsey by aeroplane or ferry between April 2019 and March 2020 was £139m. This total can be broken down by purpose of visit.

The average spend per visitor includes any spend on travel to and from Guernsey, spend on accommodation or package deals (depending on how the trip was booked), items purchased at the airport and harbour and spend on other activities such as eating out, entertainment, transport whilst on the island and the amount spent on other goods purchased in retail establishments.

[Table 3.1.2](#) and [Figure 3.1.1](#) show that leisure visitors staying for at least one night contributed 72% (£100m) of the £139m total whereas those visiting friends/relatives and business visitors staying for at least one night made up 15% and 9% of the total respectively. Leisure visitors on a day trip spent an average of £79 per visitor, totalling an estimated £2m, 2% of the total. Business visitors on a day trip also contributed 2% of the total spend but their average spend per visitor was higher than day leisure visitors, at £182. This information is presented graphically in [Figure 1.2.1](#) on [page 2](#).

For all visitors staying for at least one night, the average spend per visitor was £582, producing an estimated total spend of £134m for all staying visitors. In contrast, day visitors had an average spend of £112 per visitor which totalled an estimated £5m.

On average, all leisure visitors (both staying visitors and those on a day trip) spent £578 per visitor, totalling an estimated £102m. Business visitors (staying visitors and those on a day trip) spent £417 on average per visitor (see [Table 3.1.1](#)).

3.2 Expenditure by country of residence

Table 3.2.1 shows the total spend per visitor departing by aeroplane or ferry broken down by country of residence.

The average spend per visitor presented in **Table 3.2.1** includes any spend on travel to and from Guernsey, spend on accommodation or package deals (depending on how the trip was booked), items purchased at the airport and harbour and spend on other activities such as eating out, entertainment, transport whilst on the island and the amount spent on other goods purchased in retail establishments.

Visitors from the UK contributed 75% (£105m) of the total spend whereas visitors from Jersey, France, Germany and Holland contributed 3%, 4%, 5% and 3% of the total respectively (see **Figure 3.2.1**).

Visitors from Germany had the highest average spend per visitor at £785. Visitors from Jersey had the lowest average spend per visitor at £218.

The "Other" category includes visitors from the USA, Canada, Australia, Switzerland, the Republic of Ireland and more than 30 other countries.

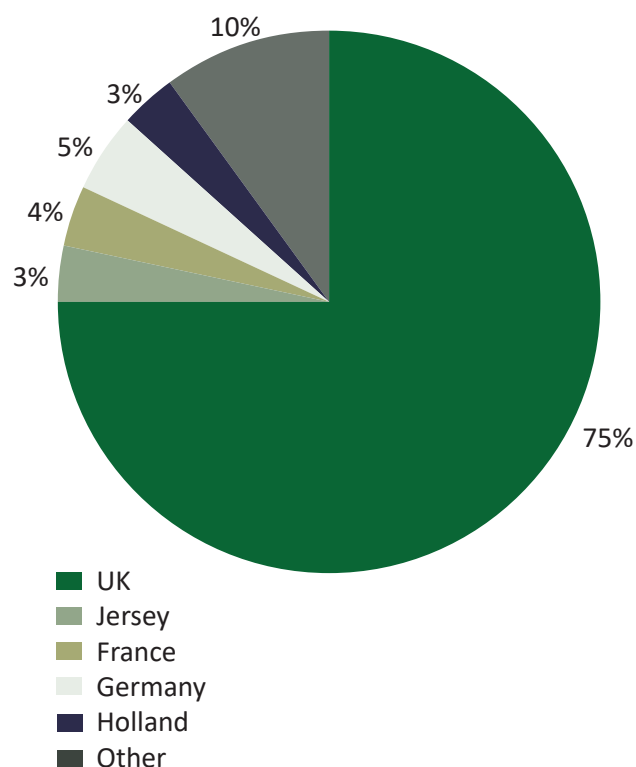
More information on visitors by country of residence in 2019 and 2020 can be found in the **Guernsey Travel Survey Reports**, which are available from guernseytrademedia.com/facts-figures.

Table 3.2.1 Expenditure by country of residence

	Average spend per visitor (£)	Overall value (£m)	% of total spend
UK	534	105	75
Jersey	218	5	3
France	287	5	4
Germany	785	7	5
Holland	729	4	3
Other	613	14	10

NB. Figures may not sum to the total due to rounding

Figure 3.2.1 Proportion of total spend by country of residence



4.1 Expenditure on package deals

Table 4.1.1 Package deal content

	% of package deals
Travel	>99
Accommodation	>99
Meals at the accommodation	90
Transfers	46
Excursions	21
Day trips off-island	18
Car hire	15
Insurance	9

This section provides information on the average spend on package deals per visitor departing by aeroplane or ferry between April 2019 and March 2020.

Table 4.1.1 shows that over 99%, but not all, package deals included travel to and from Guernsey and accommodation. Meals at the accommodation were included in 90% of package deals and 46% included transfers to the accommodation.

Table 4.1.2 shows the proportion of visitors that spent something on package deals broken down by visitor type and the average amount spent by those that spent something. Those averages and proportions are used in combination with the total number of visitors to estimate the total amount spent by all visitors departing by aeroplane or ferry between April 2019 and March 2020. This information is all presented in **Table 4.1.2**.

Between April 2019 and March 2020, 29% of staying leisure visitors bought package deals. On average, these visitors spent £595 per visitor on package deals and overall, across all visitors departing by aeroplane or ferry, this spend totalled an estimated £26m (see **Table 4.1.2**).

11% of visitors departing by aeroplane or ferry recorded spend on meals, drinks or other extras in the accommodation in which they stayed that was over and above the cost of the package. Of this 11%, the average spend per visitor was £75, giving an estimated overall value of £2m.

Table 4.1.2 Money spent on package deals by purpose of visit (April 2019 to March 2020)*

	% of visitors who spent something on package deals	Of visitors that spent something on package deals, average spend per visitor (£)	Overall value (£m)
Staying leisure	29	595	26
Visiting friends/relatives	2	337	<1
Staying business	2	449	<1
Staying other	0	0	0
Total	17	588	27

* For information, a 15% deduction was applied to account for commission taken by the booking company, who operate outside of Guernsey and therefore this element of passenger spend falls outside of the Guernsey economy. The figures presented in **Table 4.1.2** show the estimated amount directly received by Guernsey providers. Some visitors paid for their package deal in euros. The total amount of the package was converted into pounds using a conversion rate of 0.90.

5.1 Expenditure on travel

This section provides information on the average spend on return fares to Guernsey per visitor departing by aeroplane or ferry between April 2019 and March 2020. It only includes spend on travel when it was booked separately to accommodation and for visitors departing by aeroplane or ferry on a day trip. Information on visitors departing by aeroplane or ferry who booked a package holiday can be found on [page 7](#).

Table 5.1.1 shows the proportion of visitors that spent something on travel broken down by visitor type and the average amount spent by those that spent something. Those averages and proportions are used in combination with the total number of visitors to estimate the total amount spent by all visitors departing by aeroplane or ferry between April 2019 and March 2020. This information is all presented in **Table 5.1.1**. It can be seen that 90% of visitors visiting friends/relatives for at least one night spent money on travel to and from Guernsey. On average, these visitors spent £147 per visitor on travel fares.

As outlined on [page 7](#), 29% of staying leisure visitors purchased a package deal between April 2019 and March 2020 meaning only 61% of leisure visitors staying for at least one night recorded spend on travel to and from Guernsey. Of these visitors, the average spend per visitor was £138 and across all visitors departing by aeroplane or ferry this spend totalled an estimated £13m.

10% of visitors represented by the survey did not know how much they spent on travel, which was a higher proportion than on any other category of spend. Business visitors often have their travel pre-booked and paid for by their employer meaning the proportion of business visitors that did not know their travel costs was particularly high (27%). Where a 'don't know' response was recorded, it was assumed that the party spent the average value. This should be borne in mind when analysing the results.

Table 5.1.1 Money spent on travel by purpose of visit (April 2019 to March 2020)*

	% of visitors who spent something on travel	Of visitors that spent something on travel, average spend per visitor (£)	Overall value (£m)
Staying leisure	61	138	13
Visiting friends/relatives	90	147	7
Staying business	70	221	3
Staying other	86	133	<1
Day visitors total	83	78	3
Total	71	136	27

NB. Figures may not sum to the total due to rounding

* The information presented in **Table 5.1.1** excludes visitors who booked a package deal.

6.1 Expenditure on accommodation

The following section provides information on the average spend on accommodation per visitor departing by aeroplane or ferry between April 2019 and March 2020. The average total cost includes any deposits made and any meals, drinks and other extras that were paid for in the accommodation. The information presented here refers to visitors departing by aeroplane or ferry who booked their accommodation separately to their travel fares. Information on package deals can be found on [page 7](#).

Table 6.1.1 shows the proportion of visitors that spent something on accommodation broken down by visitor type and the average amount spent by those that spent something. Those averages and proportions are used in combination with the total number of visitors to estimate the total amount spent by all visitors departing by aeroplane or ferry between April 2019 and March 2020. It can be seen that 61% of staying leisure visitors spent money on accommodation. Of this 61%, the average spend per visitor was £296 and across all visitors departing by aeroplane or ferry this spend totalled an estimated £27m. 67% of visitors staying for business purposes recorded spend on accommodation. On average, these visitors spent £218 per visitor.

5% of visitors represented by the survey did not know how much they spent on accommodation. Business visitors often have their accommodation pre-booked and paid for by their employer meaning the proportion of business visitors that did not know the cost of accommodation was particularly high (22%). Where a 'don't know' response was recorded, it was assumed that the party spent the average value. This should be borne in mind when analysing the results.

Table 6.1.1 Money spent on accommodation by purpose of visit (April 2019 to March 2020)*

	% of visitors who spent something on accommodation	Of visitors that spent something on accommodation, average spend per visitor (£)	Overall value (£m)
Staying leisure	61	296	27
Visiting friends/relatives	21	213	2
Staying business	67	218	3
Staying other	66	166	< 1
Total	44	275	34

NB. Figures may not sum to the total due to rounding

* For information, a 15% deduction was applied to the spend when accommodation was booked through a booking company. This is to account for commission taken by the booking company, who operate outside of Guernsey and therefore this element of passenger spend falls outside of the Guernsey economy. The figures presented in **Table 6.1.1** show the estimated amount directly received by Guernsey providers. The figures exclude visitors who booked a package deal.

7.1 Expenditure at the airport and harbour (including duty free)

Table 7.1.1 shows the proportion of visitors departing by aeroplane or ferry that purchased items at the airport or harbour and the average amount spent by those that spent something. Those averages and proportions are used in combination with the total number of visitors to estimate the total amount spent by all visitors departing by aeroplane or ferry between April 2019 and March 2020. This information is all presented in **Table 7.1.1**.

Of the 22% of visitors that spent something on duty free items at the airport, the average spend per visitor was £25 and overall, across all visitors, this totalled an estimated spend of £1.5m. The average spend per visitor for those who purchased non-duty free items at the airport or harbour were £4 and £8 respectively.

Table 7.1.1 Money spent on items at the airport and harbour (April 2019 to March 2020)

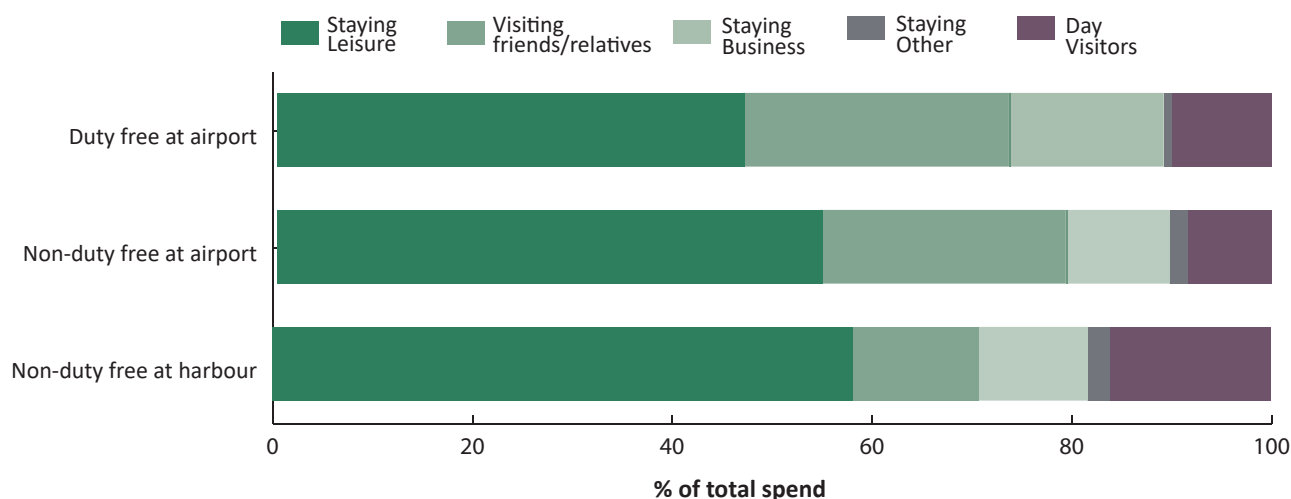
	% of visitors who spent something on items at the airport/harbour	Of visitors that spent something on items at the airport/harbour, average spend per visitor (£)	Overall value (£'000s)
Duty free items at airport	22	25	1,504
Non-duty free items at airport	20	4	246
Non-duty free items at harbour	6	8	141

Leisure visitors staying for at least one night contributed the most (47%) of the £1.5m spent on duty free items at the airport (see **Figure 7.1.1**). Of the £246,000 spent on non-duty free items at the airport and £141,000 at the harbour, staying leisure visitors made up 55% and 58% of the total respectively.

Of the £1.5m spent on duty free items at the airport, visitors staying for business purposes contributed 15% of the total.

Day visitors contributed 16% of the total amount spent on non-duty free items at the harbour compared to 8% on non-duty free items at the airport and 10% on duty free items.

Figure 7.1.1 Proportion of total spend on items at the airport and harbour by purpose of visit (April 2019 to March 2020)



8.1 Other expenditure

Section 8 of this report contains information on any other spend not already included in this report and includes spending in four main categories: eating out and drinking outside the accommodation (including restaurants, cafés, bars), entertainment and leisure (theatres, cinema, tours, museums, visitor attractions, transport to other islands, sporting activities), transport whilst in Guernsey (bus and taxi fares, hire cars, bicycle hire, petrol) and any other items (such as clothes, jewellery, electrical goods, food and drink bought in shops, gifts and souvenirs, cigarettes and tobacco).

Table 8.1.1 Money spent on other items by category (April 2019 to March 2020)

	% of visitors who spent something on category	Of visitors that spent something on category, average spend per visitor (£)	Overall value (£m)
Eating out	88	90	22
Entertainment	46	26	3
Transport	66	25	5
Other	61	54	9

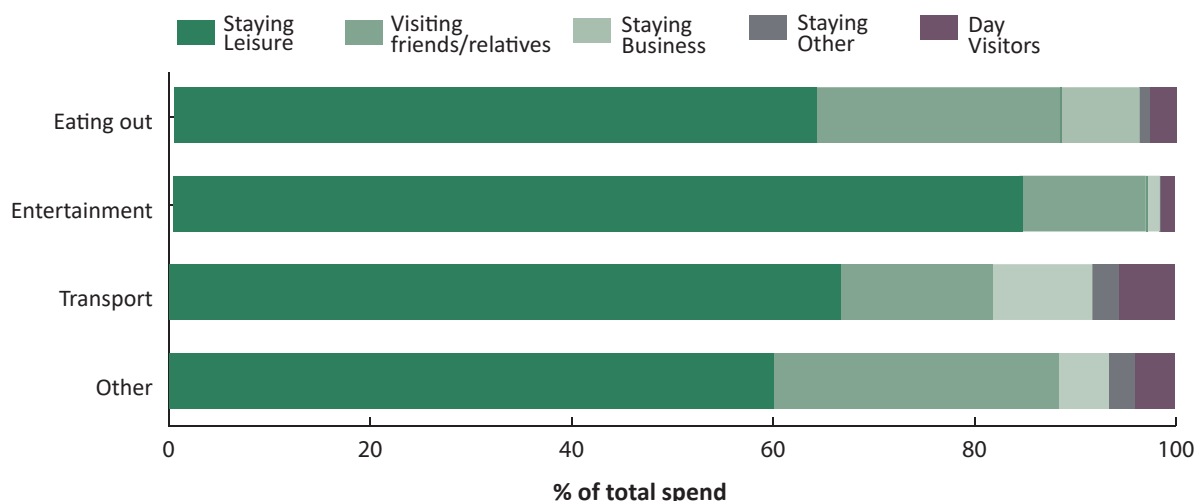
The spend presented in **Table 8.1.1** includes cash, bank cheques and credit and debit card payments. It excludes any spending on trips whilst in France or on other Channel Islands, duty free purchases or any items bought on the boat or aircraft when travelling to Guernsey. Information on the average spend on package deals, travel and accommodation can be found on [pages 7 to 9](#).

Table 8.1.1 shows the proportion of visitors departing by aeroplane or ferry that spent something on each category and the average amount spent by those that spent something. Those averages and proportions are used in combination with the total number of visitors to estimate the total amount spent by all visitors departing by aeroplane or ferry between April 2019 and March 2020. This information is all presented in **Table 8.1.1**.

It can be seen that 88% of visitors departing by aeroplane or ferry spent something on eating out, which was a higher proportion than on any other category. Their average spend was £90 per visitor and overall, across all visitors departing by aeroplane or ferry, this spend totalled an estimated £22m.

Leisure visitors staying for at least one night contributed 64% of the £22m total spent on eating out whilst those visiting friends/relatives made up 25% of the total (see **Figure 8.1.1**). Staying leisure visitors also contributed the most to the total amount spent on entertainment, transport and other items in retail establishments (84%, 67% and 60% respectively).

Figure 8.1.1 Proportion of total spend on other items by purpose of visit (April 2019 to March 2020)



9.1 Profile of survey respondents

Survey respondents completed the survey on behalf of their party, which could be just themselves or a group of more than one person. Thirteen surveys were removed from the analysis during the data cleaning process, since they contained insufficient information or included outliers.

The remaining 4,048 surveys, on which the results presented in this report are based, represented 8,038 visitors in total.

The profile of visitors represented by those that completed the spend survey is presented in **Table 9.1.1** to **9.1.4**.

As shown on **page 13**, the profile of survey respondents differs slightly to the profile of respondents to the **Guernsey Travel Survey** reports, which are based on a different, larger sample. However, they are broadly comparable.

Of the 8,038 visitors represented by the survey, 55% were leisure visitors staying for at least one night and 72% were from the UK (see **Table 9.1.1** and **9.1.2**).

44% of survey respondents were aged 60 or over (see **Table 9.1.3**).

Table 9.1.4 shows that 66% of respondents travelled by air.

Table 9.1.4 Survey respondents by mode of transport

Mode of transport	April 2019 to March 2020	
	Number	%
Aeroplane	5,285	66
Ferry	2,753	34
Total	8,038	100

Table 9.1.1 Survey respondents by purpose of visit

Purpose	April 2019 to March 2020	
	Number	%
Staying leisure	4,395	55
Visiting friends/relatives	1,647	20
Staying business	645	8
Staying other	110	1
Day visitors total	1,241	15
Total	8,038	100

Table 9.1.2 Survey respondents by country of residence

Country of residence	April 2019 to March 2020	
	Number	%
UK	5,774	72
Jersey	630	8
France	542	7
Germany	245	3
Holland	176	2
Elsewhere	671	8
Total	8,038	100

Table 9.1.3 Survey respondents by age

Age	April 2019 to March 2020	
	Number	%
0 to 3	78	1
4 to 11	235	3
12 to 17	269	3
18 to 24	299	4
25 to 34	652	8
35 to 44	761	9
45 to 49	572	7
50 to 54	769	10
55 to 59	852	11
60 to 64	977	12
65 to 69	920	11
70 to 74	915	11
75 +	739	9
Total	8,038	100

10.1 Methodology

Table 10.1.1 Sampling by purpose of visit (April 2019 to March 2020)

	% of sample in travel survey	% of sample in visitor spend survey
Staying leisure	49	55
Visiting friends/relatives	20	20
Staying business	11	8
Staying other	3	1
Day visitors total	17	15

Table 10.1.2 Sampling by country of residence (April 2019 to March 2020)

	% of sample in travel survey	% of sample in visitor spend survey
UK	67	72
Jersey	7	8
France	11	7
Germany	4	3
Holland	2	2
Elsewhere	9	8

Table 10.1.3 Sampling by mode of transport (April 2019 to March 2020)

	% of sample in travel survey	% of sample in visitor spend survey
Aeroplane	64	66
Ferry	36	34

Face-to-face surveys were conducted at Guernsey's airport and harbour between April 2019 and March 2020 by a team of surveyors managed by Marketing & Tourism. The interviews were conducted in shifts, covering all routes, days of the week and times of day. Quota targets for different profiles of passenger (e.g. business staying visitors, leisure day visitors, etc.) were set to ensure that sufficiently robust sample sizes were achieved. Passengers were selected at random during the shift and one passenger per party was targeted. Completed interviews were then compared with the overall target and shifts adjusted accordingly to ensure that quota targets were met.

On 19th March 2020, it was announced that every person arriving in Guernsey from outside of the Bailiwick would by law have to self-isolate for 14 days due to the coronavirus pandemic and only essential travel was permitted. As a result, the last set of exit surveys relating to visitor spend took place on 15th March 2020.

Between April and September 2019, a total of 4,061 interviews were completed. Once the data had been input and cleaned, nine surveys were removed from the analysis since they contained insufficient information and four were removed because they contained outliers. The remaining 4,048 surveys represented 8,038 visitors. This equates to a 3% sample of the total number of visitors departing Guernsey by aeroplane or ferry between April 2019 and March 2020.

The information presented in this report is based on the results from the visitor spend survey which does not use the same sample as the **Guernsey Travel Survey**. Tables 10.1.1 to 10.1.3 show the different samples. More detailed information on the number and profile of visitors departing by aeroplane or ferry can be found in the latest edition of the **Guernsey Travel Survey** at guernseytrademedia.com/facts-figures.

10.1 Methodology

Please note that the figures are presented in this report as estimates because they are based on survey data. All reasonable steps have been taken to ensure the survey sample is representative of the whole visitor population and to obtain an adequate sample size in order to ensure high confidence. The figures presented have a confidence interval of 2% i.e. are thought to be accurate to within plus or minus 2%.

The total spend values were estimated by calculating the average spend per visitor based on the survey responses and then multiplying this up by the total number of visitors departing by aeroplane or ferry. Where a 'don't know' response was recorded, it was assumed the party spent the average value.

A 15% deduction was applied to the amount spent on package deals and accommodation booked through a booking company to account for commissions. The figures presented in **Table 4.1.2** on **page 7** and **Table 6.1.1** on **page 9** show the estimated amount directly received by Guernsey providers.

Some visitors paid for their package deal in euros. The total amount was converted into pounds using a conversion rate of 0.90.

10.2 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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