

Departing Travellers Experience Survey - Analysis of Result

A Introduction

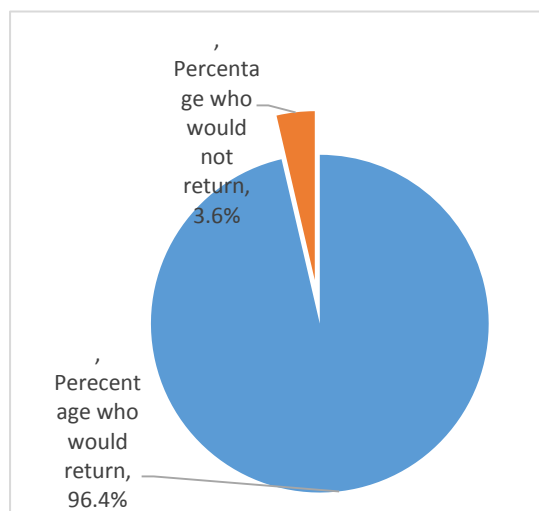
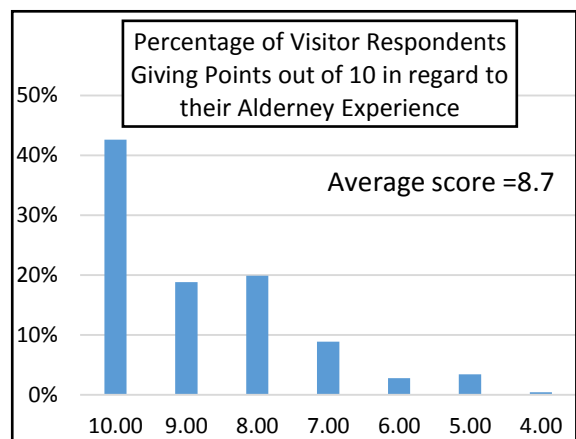
The Alderney 'Travel Experience Survey' was distributed at Alderney Airport and given out on the Bumble Bee ferry and the Victor Hugo ferry during the period 1st July to 9th August. The States of Alderney, and Visit Alderney would like to thank all those who participated in the surveys. A special thanks goes to Emma Nelson who undertook the coding and main analyses and to Anne-Isabelle Boulon who translated the survey into French for the benefit of those travelling to Dielette on the Victor Hugo.

A total of 602 responses were obtained. With an average party size of 2.16 persons this means we were able to obtain data relating to about 1,300 individual passengers – both visitors and residents.

Of particular importance is the information on visitor spending. We believe this is the first time such information has been collected.

As appropriate, separate analyses have been undertaken of:

- Visitors departing by air (mainly by Aurigny)
- Visitors departing by sea (mainly on the Bumblebee and Victor Hugo)
- Resident travel patterns.



The report begins with a brief analysis of our Visitors' general response to the Alderney experience.

Visitors were asked to score their Alderney Experience on a scale of 1 to 10 with 10 being the maximum and 1 the minimum. With an average score of 8.7 this is a remarkable achievement for our hospitality industry and one about which the island should be proud.

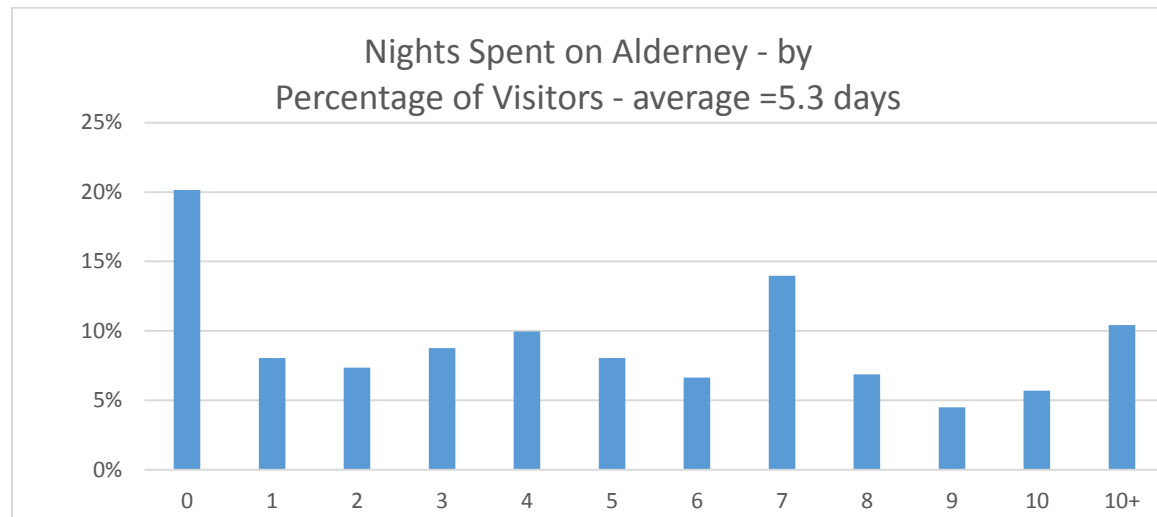
Visitors were also asked if they would return to Alderney. Overwhelmingly they said that they would.

Clearly Alderney's visitors are a valuable economic resource that needs to be nurtured

B Visitor Characteristics

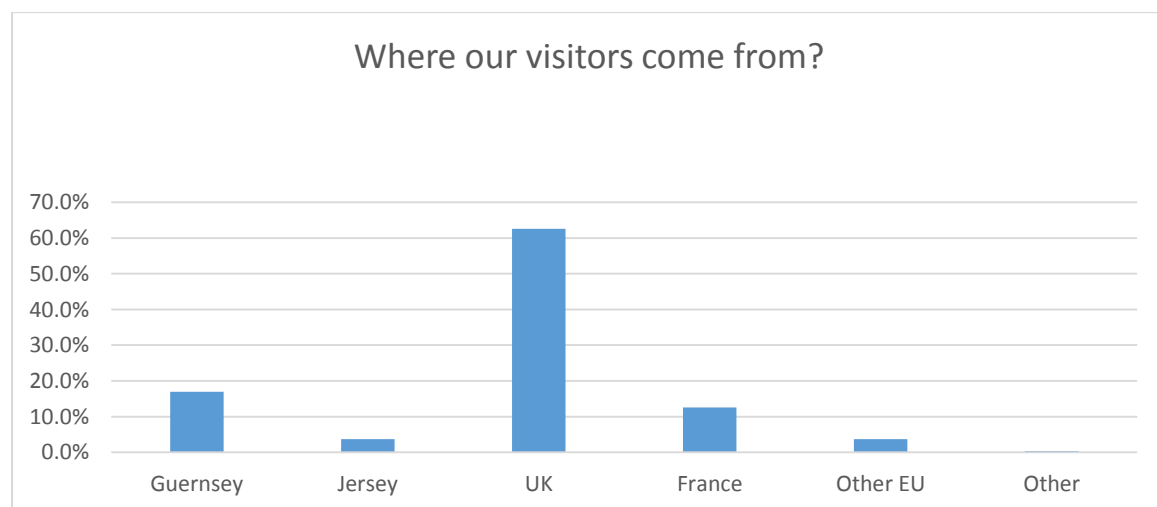
Length of Stay

Visitors were asked to report the number of nights they spent on Alderney. The average stay was 5.3 days and about 20% were day visitors only.



Where our Visitors Come From?

Visitors were asked where they come from. The results are shown below. These results may have been influenced by seasonal factors but are, nonetheless, useful indicators.

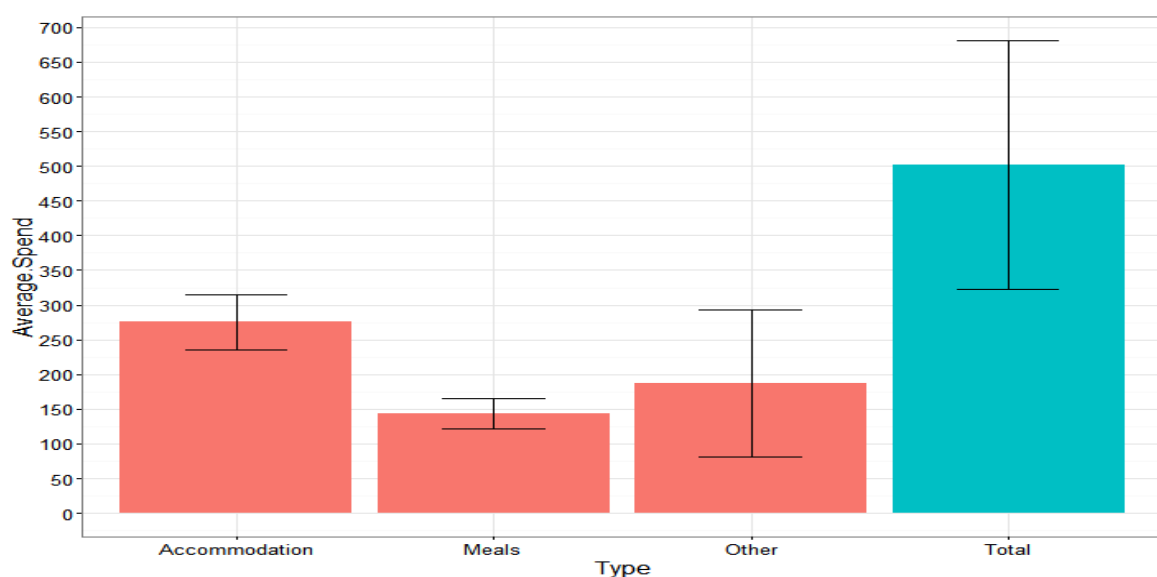


C Spending

Spending: Air Transport Visitors

Of the 491 parties departing by air, 66% provided estimates of how much they had spent on accommodation, meals and other items during their visit¹.

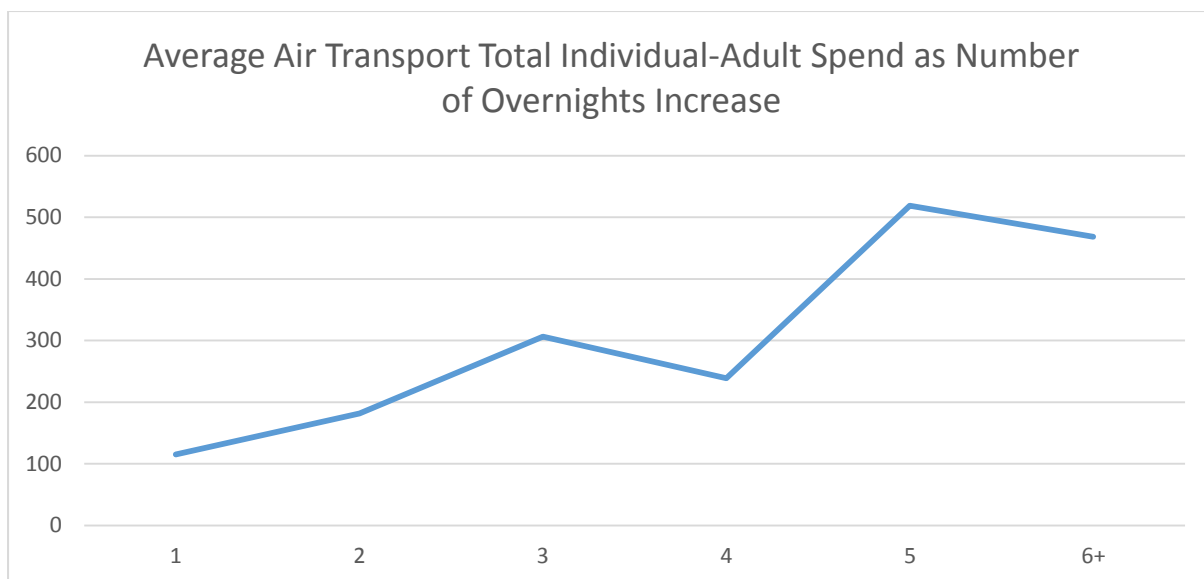
Average adult visitor spend on each of 'accommodation', 'meals and drinks in restaurants' is shown below. Also shown are 95% confidence limits². Only 29.7% of visitors reported spending anything on accommodation – many citing their reason this as staying with family and friends who are residents or owning holiday homes. A much larger proportion, 62.1%, spent money on meals and drinks in restaurants and another 49.2% spent money on 'other' items.



The average spend by visitors who departed by air was £501 (the 95% confidence upper and lower confidence levels are GBP 681 and GBP 322).

¹ It was assumed that no visitors spent £0. It was also impossible to separate those who spent £0 from those who chose simply not to respond to the spend questions. Our assumption may have caused some small overestimate in the spend analyses. If all those who did not record spend data are assumed to have spent nothing, the mean amount spent falls to £331.79.

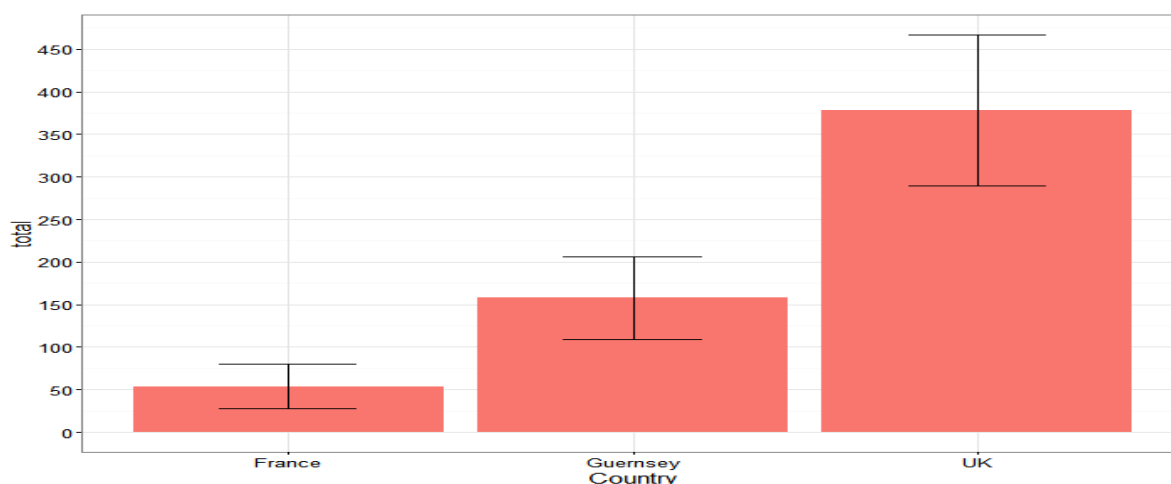
² ie There is a 95% probability that the value of the parameter falls within the indicated range. When the indicated range is large there was a wide range in the responses obtained.



The average length of stay of air transport visitors was 6.3 nights. When visitors who did not stay at least one night are excluded, the average length of stay was 6.1 nights.

Spending: According to Visitor Main Place of Residence

Visitor spending also varied according to visitor places of main residence. The average amount spent by visitors from various jurisdictions and the corresponding 95% confidence intervals are shown below. Unsurprisingly our visitors from UK spend most.

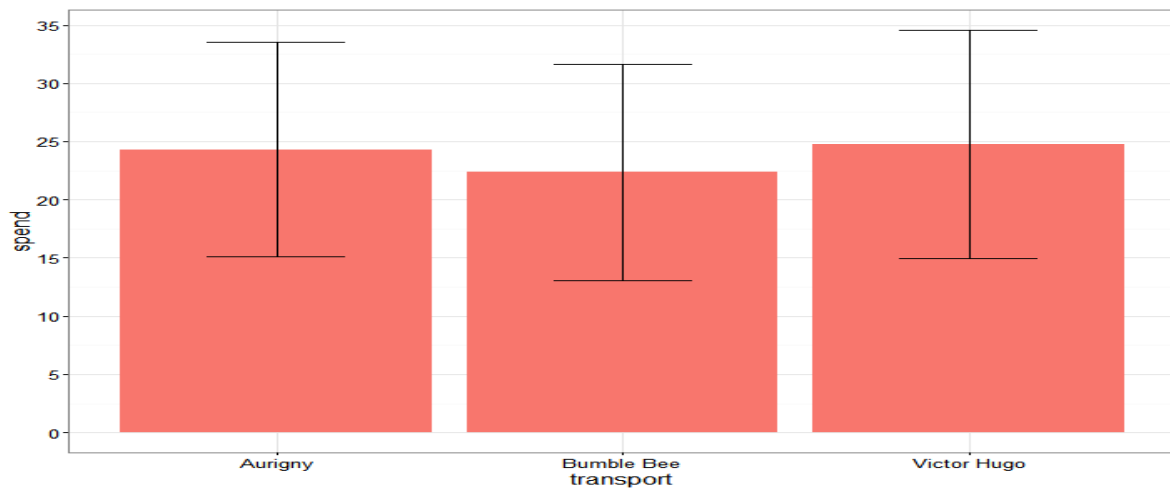


Spending: Visitors travelling on the Bumblebee

Only 32 responses were obtained from visitors who travelled with the Bumblebee ferry. The average recorded amount spent was £74 (95% confidence maximum and minimum levels: £36 and £112). The small sample size means that this figure may not be a reliable estimate. Efforts are, consequently, continuing to try and improve this data set.

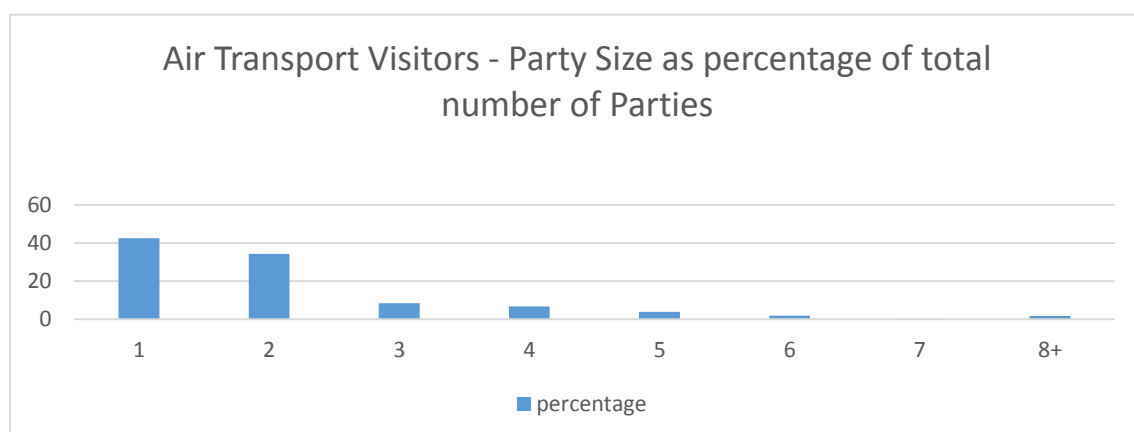
Spending: Visitors not Overnighting

Information was also obtained in regard to the average spending habits of those visitors who did not overnight. Average spending per adult was £ 24. Separate analyses and 95% confidence levels are shown below for the air transport (mainly Aurigny, but some private plane visitors), Bumble Bee and Victor Hugo travellers.



D Air Passengers – Other Data

A large proportion of our visitors by air were lone travellers, 42.5%. Groups of two were also frequent 34.2%. Groups of more than 5 people accounted for only 7.5% of travellers.

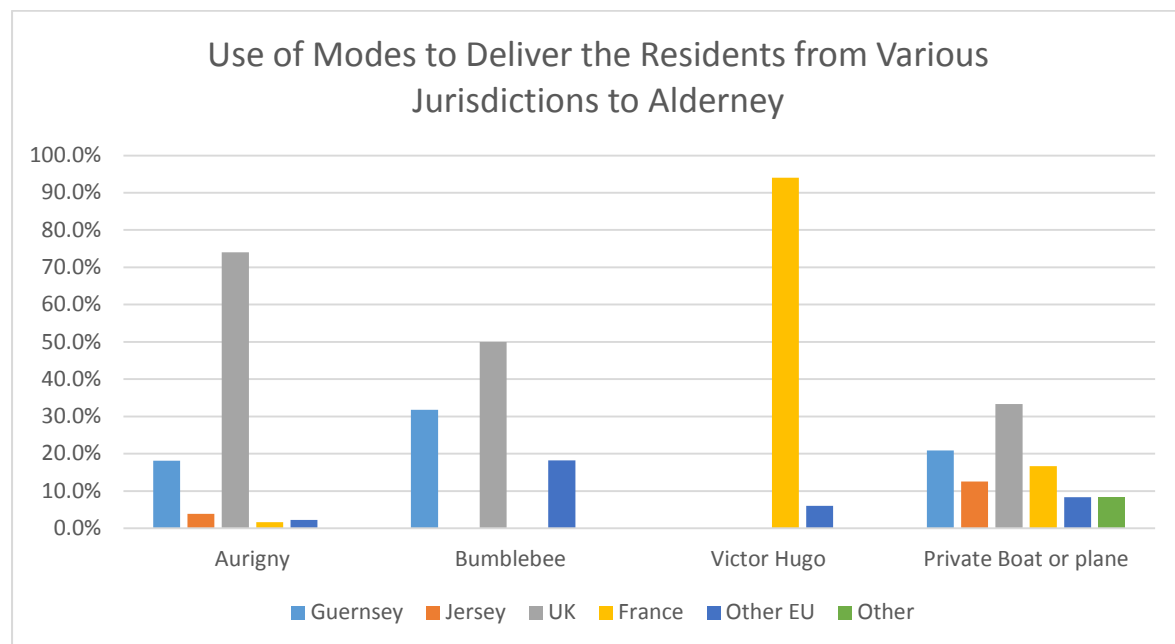


The main stated reason for visits to Alderney by air passengers was leisure, 88%. Another 12% reported as travelling for business purposes. This data probably reflects the seasonality of the survey. There will be a much small proportion of leisure visitors in off-peak seasons.

E Modal Patronage

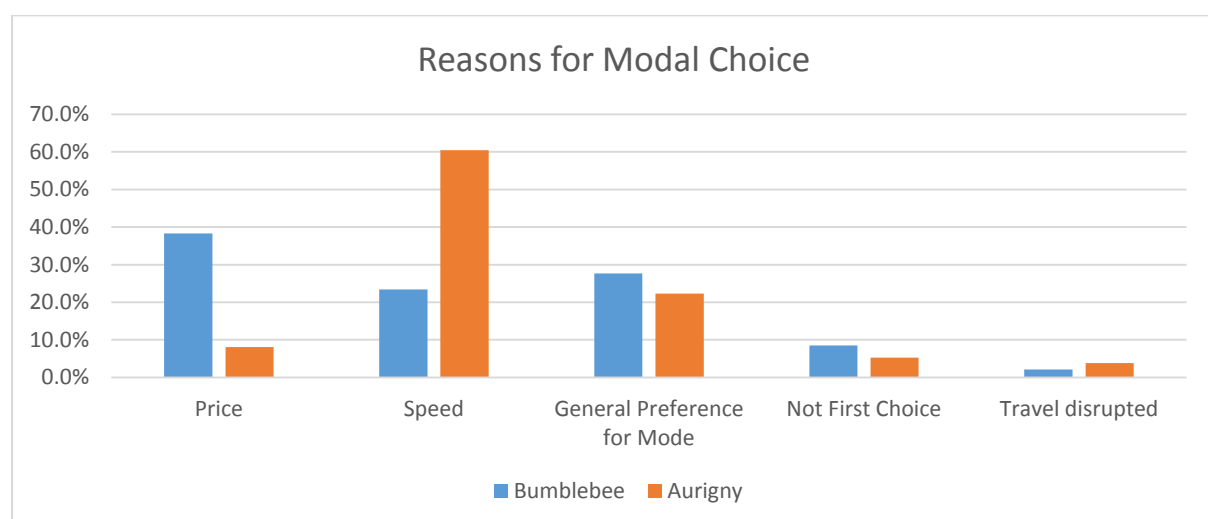
By Visitor Residence

The modes used by the residents of various jurisdictions to access Alderney during the survey period is shown below. This data reflects the situation during the run up to and at the height of the tourist season and should not be seen as representative of the situation throughout the year. The data is, nonetheless, useful as an indicator of modal patronage levels.



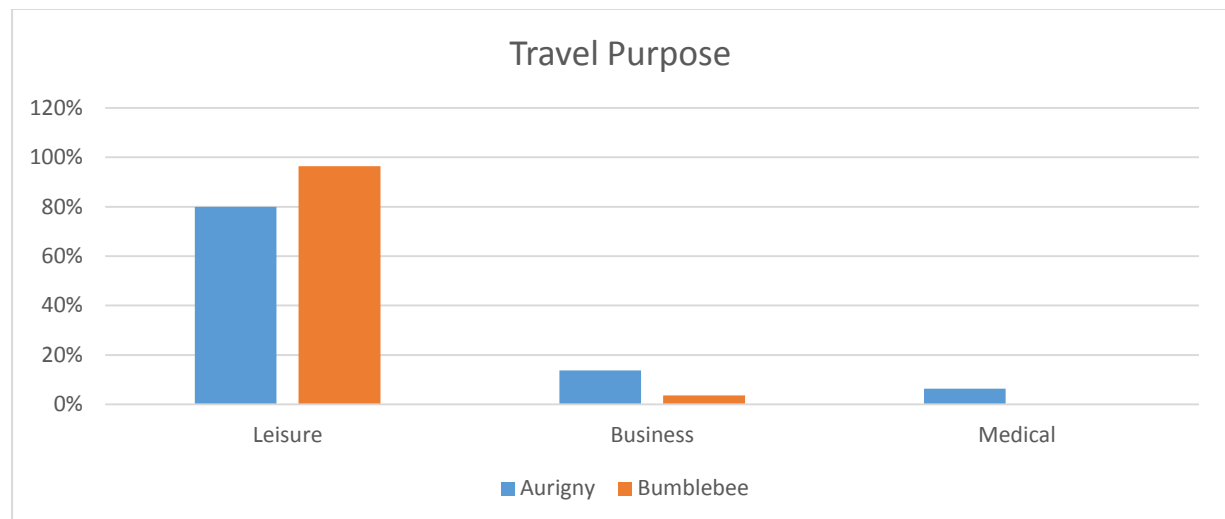
By Service Quality or Force of Circumstance

Visitors and residents were asked why they were travelling by air or why they were travelling by sea. Although the question was of most relevance when there was a sensible choice, it also indicated when travellers may have had to abandon their first choice in favour of an alternative.



By Trip Purpose

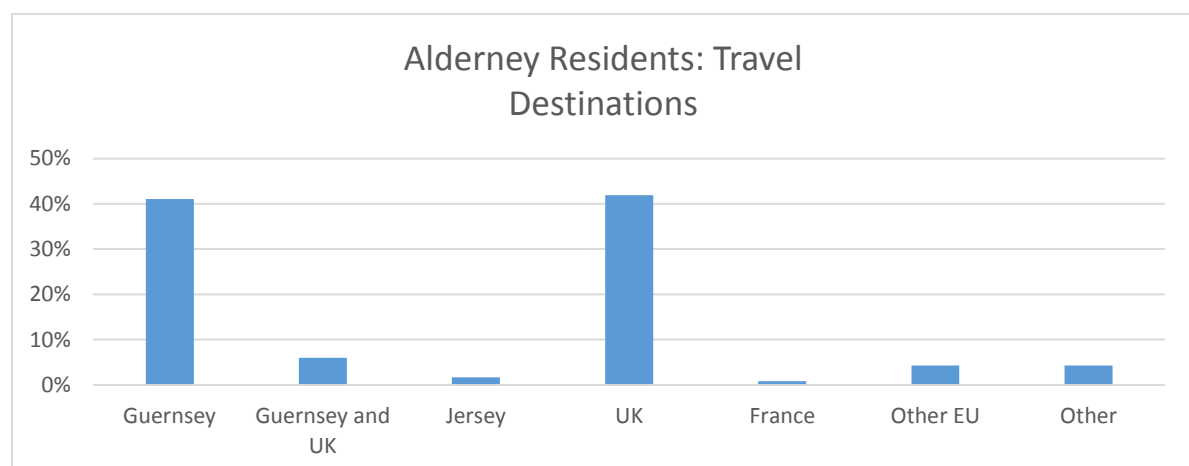
Both visitors and residents were asked what their trip purpose was. Unsurprisingly there were few business trips and no medical trips on the Bumblebee.



F Resident Information

There were 142 responses from parties composed of residents of Alderney travelling off-island. Their destinations are shown below.

The dominant destinations are Guernsey and the UK with over 40% of visits to each.



The average number of nights spent away by Alderney residents was 4.8.

The average number of trips made off-island per year was estimated as 11.5³.

³ Residents who never travel off-island were unable to have been recorded. The estimate may consequently be a little high. Most residents are, however, believed to travel off-island at least once per year.

G General Comments

Both visitors and residents were given the opportunity to comment on any aspect of their visitor experience. A large proportion availed themselves of this opportunity. The results are provided in **Appendix A**. Responses are categorised:

- Comments in English mainly from travellers on Aurigny and the Bumblebee
 - General comments on Alderney as a destination
 - Travel specific comments
- Comments in French (translated) from travellers on the Victor Hugo

H Other Background Information

The majority of the responses, 81%, were air travellers on Aurigny, 5% were passengers on the Bumblebee and 9% passengers on the Victor Hugo.

Passengers were 53% male, 44% female and 13% children below the age of 16. Of the island residents, 42% were male, 52% female and 6% children below the age of 16.