

ALDERNEY PASSENGER EXIT SURVEY (OCT'18 TO SEP'19)



States of
Alderney

ALDERNEY PASSENGER EXIT SURVEY

Background

This is the first report produced which profiles passengers exiting Alderney both by air and sea on scheduled carriers. Similar surveys have been carried out both in Jersey and Guernsey for many years as well as in many other jurisdictions.

The survey was launched on 1 October 2018 at Alderney Airport with a similar survey undertaken at the Harbour (to cover the Little Ferry departures) between June 2019 and September 2019 inclusive.

The survey is now an ongoing piece of research and will allow year-on-year comparisons to be undertaken.

Methodology

The research was carried out during every other week each month (26 weeks in total) comprising as follows:

- **Week 1:** All departing passengers on Monday, Wednesday, Friday, and Sunday scheduled services invited to complete survey.
- **Week 2:** No Survey
- **Week 3:** All departing passengers on Tuesday, Thursday, and Saturday scheduled services invited to complete survey
- **Week 4:** No Survey

Total actual scheduled air passenger numbers by month were provided by the States of Guernsey and by the Little Ferry Company as far as scheduled sea passenger departures were concerned.

Questions

Primary survey questions covered the following areas:

- Route (Guernsey or Southampton) being used by departing passengers (all passengers)
- Country/Island of origin (all passengers) & final destination (Guernsey bound passengers)
- Primary purpose of travel (leisure, business, medical, second home owner, other (covers personal reasons, student travel, sport))
- Party size (all passengers) and age of person completing the survey
- Length of stay on island (visitors only). Number of days away from island (residents)
- Type of accommodation used while on island (visitors only) (e.g. registered accommodation, staying with friends and relatives (VFR) etc.)

Visitors to the Island were also asked further qualitative questions about their stay in the island and a summary of these findings will be issued shortly.

SCHEDULED AIR SERVICES (1 Oct 2018 to 30 Sept 2019)

3,534 surveys were completed during the twelve months period ended 30 September 2019 covering 5,600 departing passengers. In total during the period, there were 26,177 air passengers. Given the sample size, the margin of error of this element of the survey was $\pm 1.5\%$. Only a handful of departing passengers declined to complete the survey for various reasons.

OVERALL SCHEDULED PASSENGER AND AIRCRAFT MOVEMENTS

54% of all persons travelling in and out of Alderney by air used the Guernsey service with 46% using the direct Southampton service. Figure 1 highlights the air passenger movements' distribution by month. This clearly illustrates the August peak demand primarily using the direct Southampton link.

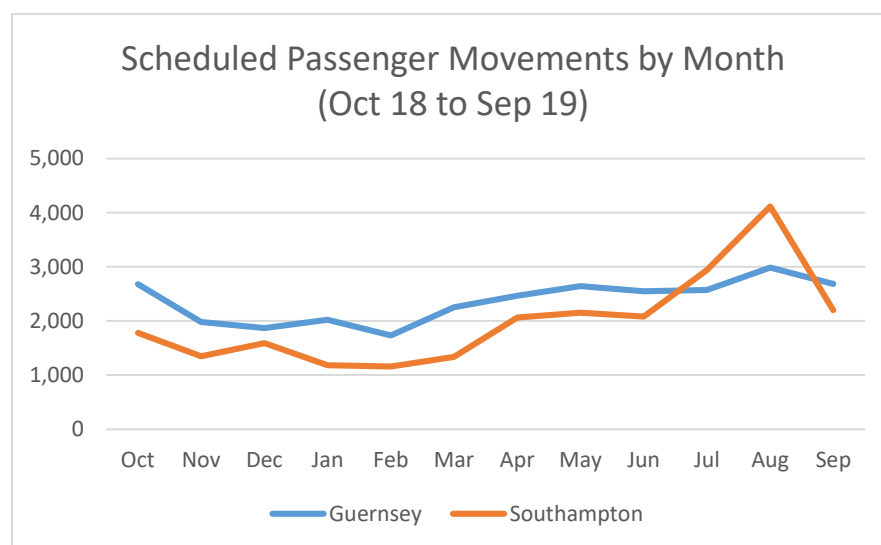


Figure 1

As far as scheduled aircraft movements were concerned, Figure 2 shows the distribution by month. Again, this illustrates the additional Southampton movements in July but primarily in August.

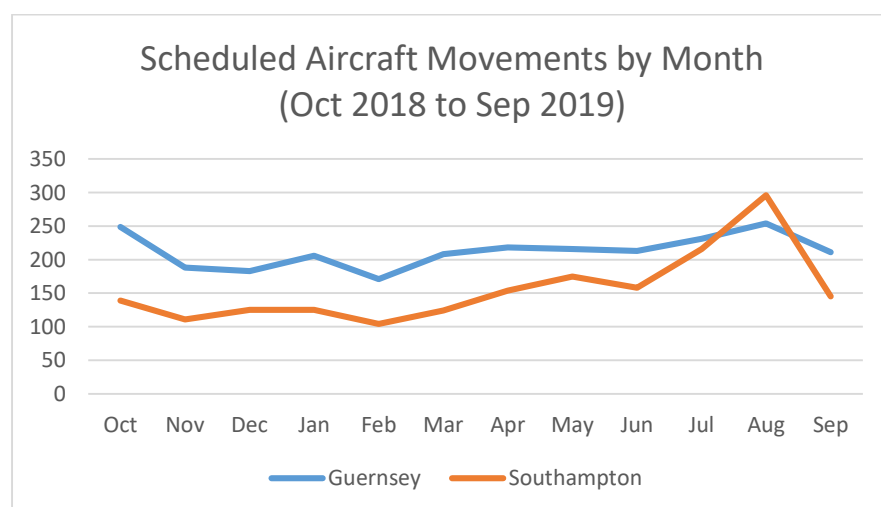


Figure 2

Despite a 7% reduction (from 2,726 down to 2,548) in scheduled aircraft movements on the Southampton service between October 2018 and September 2019 over the same period in 2017/18, Southampton passenger movements were up by 3% over the same 2017/2018 period.

During the nine month period ended 30 June 2019, while Guernsey aircraft movements during this period were only very slightly down from 1,887 to 1,852 over the same nine month period in 2017/18, passenger movements had been very slightly up.

However, there was a 17% reduction in scheduled aircraft movements on the Guernsey service in Quarter 3 of 2019 over Q3 in 2018 (from 839 to 696) and this did adversely impact on Guernsey passenger movements during this quarter which dropped by 14% from 9,579 to 8,237. The winter schedule was also brought forward to the second week of September.

Therefore, overall, passenger movements on the Guernsey service during the twelve month period ended September 2019 were down by 4% over the corresponding period in 2017/18 from 29,639 to 28,419.

NB. The Little Ferry Company operated an Alderney/Guernsey passenger only service between mid-July and the end of September in 2018 and between the end of May and end of September 2019. As in 2018, this service could have had some impact on air passenger numbers during these periods.

OVERALL AIR PASSENGER MOVEMENTS (RESIDENT v. VISITOR) BREAKDOWN

As far as residents versus visitor passenger movements' was concerned, 50% were attributed to visitors to the Island, 44% to residents and 6% to second home owners (incl. of immediate party). (Figure 3).

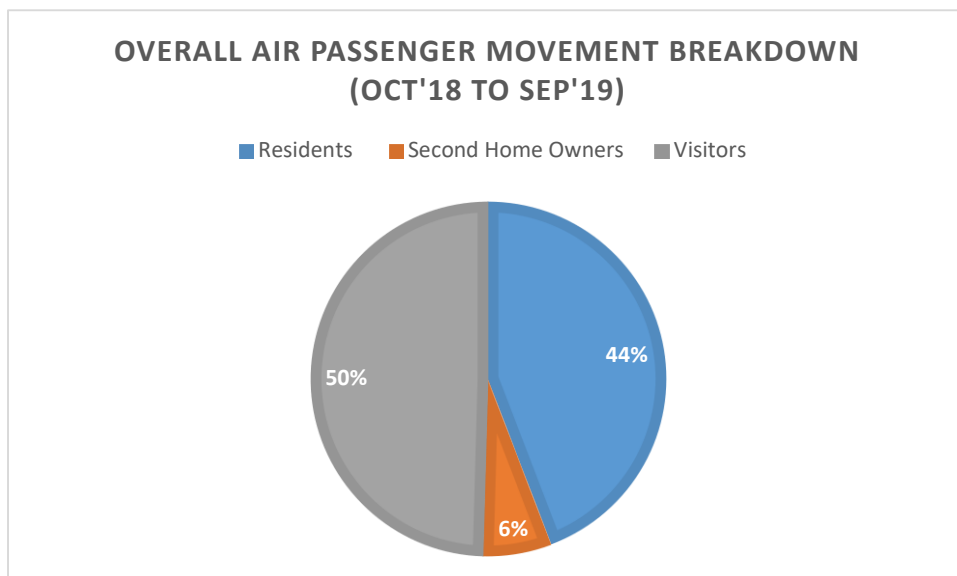


Figure 3

BREAKDOWN OF ALL AIR TRAVELLERS

The final analysis of people (residents and visitors) travelling to or from the Island by scheduled air services for the twelve months' period ended 30 September 2019 is as follows:

| ALDERNEY AIRPORT | NUMBERS of PEOPLE | | |
|--------------------------------|-------------------|------------------|---------------|
| | Oct 18 to Mar 19 | Apr 19 to Sep 19 | TOTAL |
| GUERNSEY AIR SERVICE | | | |
| Alderney residents | | | |
| Destination Guernsey only | | | |
| Medical | 1,499 | 1,363 | 2,862 |
| Leisure | 412 | 313 | 725 |
| Other reasons | 637 | 524 | 1,161 |
| Business | 450 | 409 | 859 |
| total | 2,998 | 2,609 | 5,607 |
| Onward journey via GU | | | |
| Medical | 38 | 61 | 99 |
| Leisure | 525 | 591 | 1,116 |
| Other reasons | 112 | 123 | 235 |
| Business | 75 | 112 | 187 |
| total | 750 | 887 | 1,637 |
| Alderney Visitors | | | |
| Origin Guernsey only | | | |
| Leisure | 387 | 932 | 1,319 |
| Business | 1,115 | 1,023 | 2,138 |
| Other | 194 | 284 | 478 |
| | 1,696 | 2,239 | 3,935 |
| Onward journey via GU | | | |
| Leisure | 485 | 1,684 | 2,169 |
| Business | 194 | 247 | 441 |
| Other | 49 | 108 | 157 |
| | 728 | 2,039 | 2,767 |
| Second Home Owners GU only | 12 | 42 | 54 |
| Second Home Owners UK via GU | 81 | 128 | 209 |
| TOTAL GUERNSEY | 6,265 | 7,944 | 14,209 |
| SOUTHAMPTON AIR SERVICE | | | |
| Alderney residents | | | |
| Leisure | 1,265 | 1,387 | 2,652 |
| Business | 464 | 363 | 827 |
| Other | 190 | 269 | 459 |
| Medical | 190 | 202 | 392 |
| | 2,109 | 2,221 | 4,330 |
| Alderney Visitors | | | |
| Leisure | 1,008 | 3,861 | 4,869 |
| Business | 434 | 564 | 998 |
| Other | 108 | 296 | 404 |
| | 1,550 | 4,721 | 6,271 |
| Second Home Owners | 535 | 832 | 1,367 |
| TOTAL SOUTHAMPTON | 4,194 | 7,774 | 11,968 |
| GRAND TOTAL NUMBERS | 10,459 | 15,718 | 26,177 |

NB. The above figures are actual numbers of people travelling and need to be doubled to convert to passenger movements.

ALDERNEY RESIDENTS ONLY - AIR TRAVEL

44% (23,148) of all air passenger movements (11,574 persons) were attributed to Alderney residents. Figure 4 breaks down those movements by primary purpose of travel and route taken (Orange - Southampton service, Green - Guernsey service). Movements by each purpose of travel have also been further split between the Autumn/Winter period (lighter shade) and Spring/Summer period (darker shade).

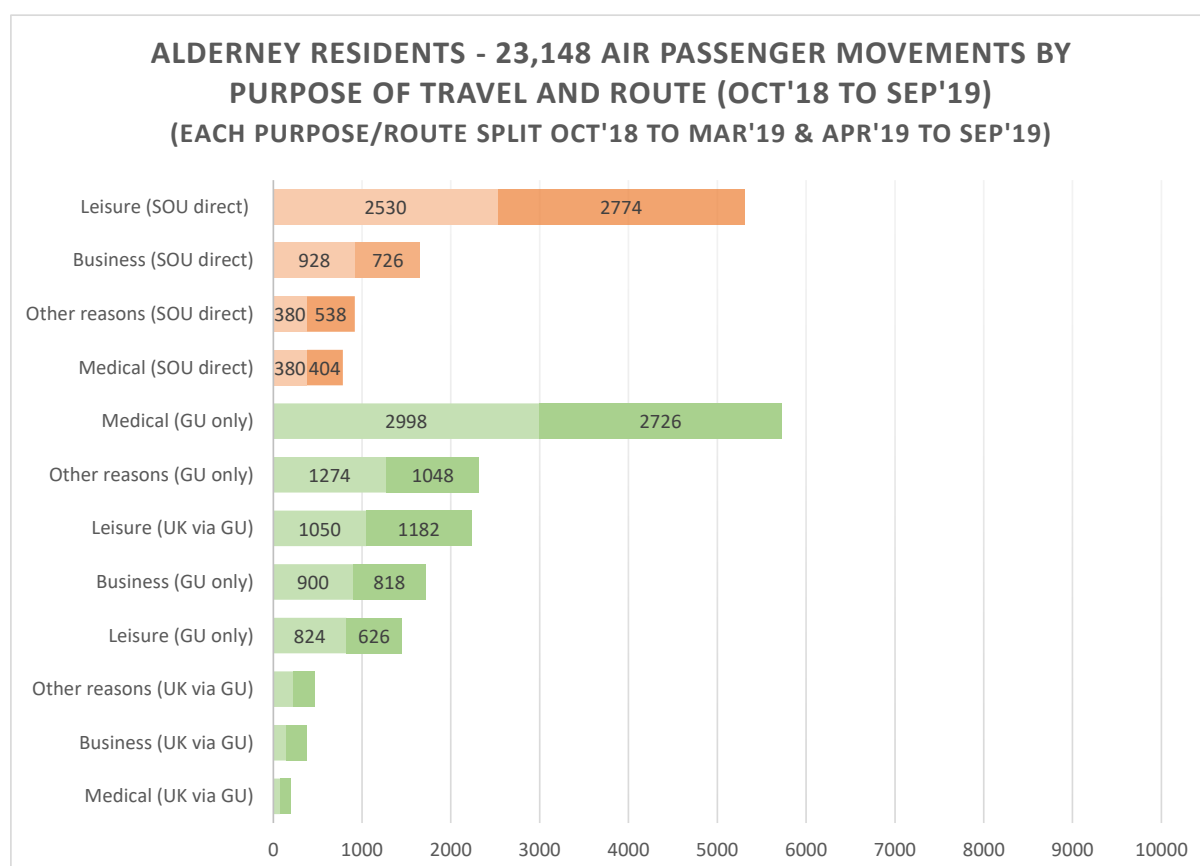


Figure 4

The Guernsey route accounted for 63% (14,488 movements) of residents' travel and the Southampton service accounted for 37% (8,660 movements) of residents' travel.

5,607 residents (11,214 movements or 77% of the overall Guernsey movements attributed to resident travel) went to Guernsey only of which approximately half were for medical referrals. 1,637 residents (3,274 movements or 23% of the overall Guernsey movements attributed to resident travel) went to Guernsey and then onwards to the UK and elsewhere primarily for leisure reasons.

4,330 residents (8,660 movements) used the Southampton service of which 61% were for leisure purposes and 19% for business.

It is interesting to note that the main purpose for using air services by residents both to Guernsey and to Southampton varied very little in terms of overall movements between the Autumn/Winter period and the Spring/Summer period.

ALDERNEY VISITORS ONLY - AIR TRAVEL

56% (29,206) of all air passenger movements (14,603 persons) were attributed to visitors (including second home owners (SHO)) to Alderney. Figure 5 breaks down these movements by primary purpose of travel and route taken (Orange - Southampton service, Green - Guernsey service). Movements by each purpose of travel have also been further split between the Autumn/Winter period (lighter shade) and Spring/Summer period (darker shade).

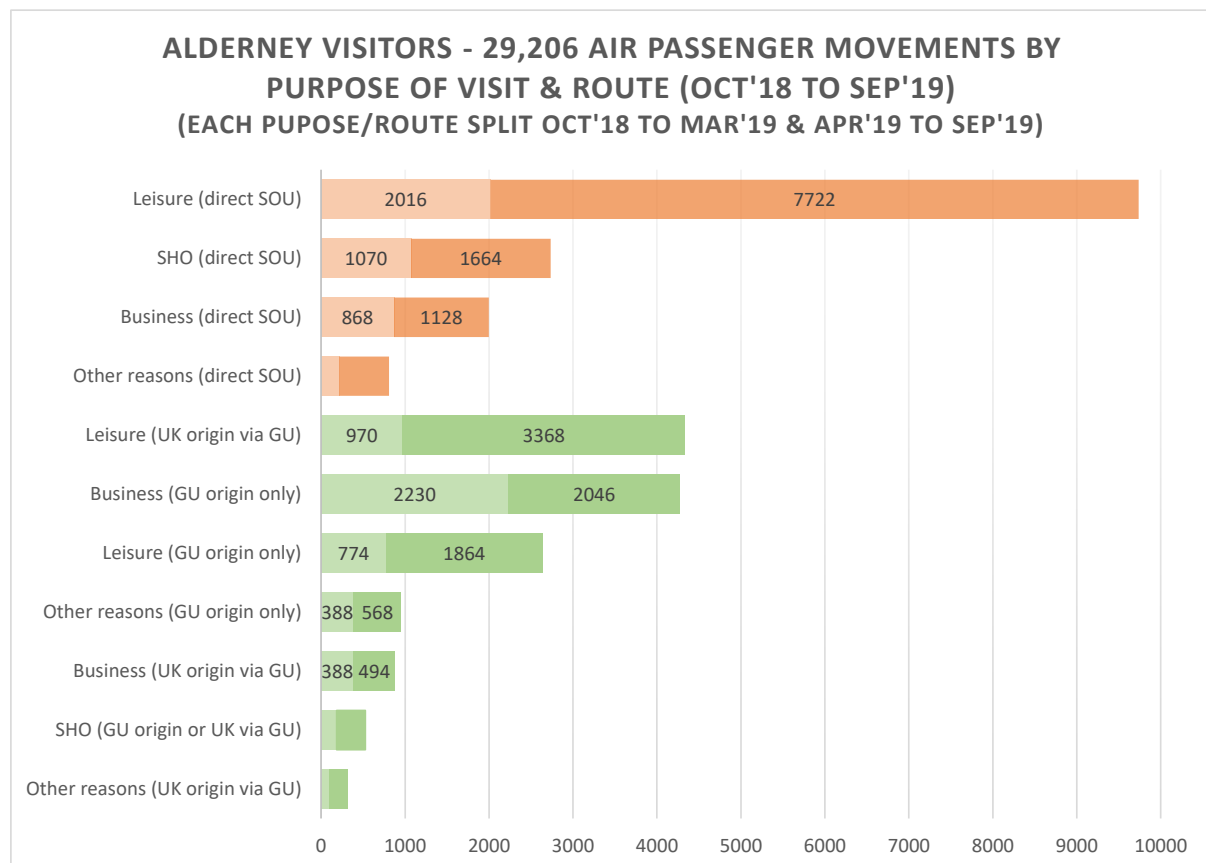


Figure 5

The Southampton route accounted for 52% (15,276 movements) of visitor travel to and from the Island with 48% of visitors (13,930 movements) coming to Alderney using the Guernsey service.

Of the 7,638 visitors (15,276 movements) using the direct Southampton service, 64% (or 4,869 people) were leisure visitors to the Island. Of this number, 79% came between April and September with the majority during Quarter 3.

Of the 6,965 visitors (13,930 movements) using the Guernsey service, 31% came through Guernsey from elsewhere primarily the UK, and the same percentage were Guernsey residents visiting the Island on business. It is again interesting to note the seasonal variation of Guernsey leisure visitors and leisure visitors from the UK via Guernsey.

11% of all visitors were second home owners (plus immediate party). The vast majority travelled to the Island via Southampton with only a very small percentage using the Guernsey service either travelling from Guernsey or via Guernsey from the UK.

TYPE OF ACCOMMODATION USED & AVERAGE LENGTH OF STAY (registered accommodation only)

NB. The two charts below do not include second home owner visits

AUTUMN/WINTER PERIOD (1 Oct 2018 to 31 March 2019)

| | Guernsey origin only | UK/Other via Guernsey | Southampton direct |
|--------------------------------|-------------------------|-------------------------|-------------------------|
| LEISURE | 387 visitors | 485 visitors | 1,008 visitors |
| Day trip | 23% | 5% | <i>Sample too small</i> |
| Registered Accommodation | 18% (av. 1.8 nights) | 57% (av. 3.8 nights) | 34% (av. 4.4 nights) |
| Staying with Friends/Relatives | 59% | 38% | 66% |
| WORK RELATED | 1,115 visitors | 194 visitors | 434 visitors |
| Day trip | 67% | 41% | 18% |
| Registered Accommodation | 33% (av. 2.0 nights) | 59% (av. 3.3 nights) | 82% (av. 2.8 nights) |
| Staying with Friends/Relatives | <i>Sample too small</i> | <i>Sample too small</i> | <i>Sample too small</i> |
| OTHER PURPOSES | 194 visitors | 49 visitors | 108 visitors |
| Day trip | 61% | <i>Sample too small</i> | <i>Sample too small</i> |
| Registered Accommodation | 16% (av. 1.1 nights) | <i>Sample too small</i> | 41% (av. 3.1 nights) |
| Staying with Friends/Relatives | 23% | <i>Sample too small</i> | 59% |

Figure 6

SPRING/SUMMER PERIOD (1 April 2019 to 30 September 2019)

| | Guernsey origin only | UK/Other via Guernsey | Southampton direct |
|--------------------------------|-------------------------|-------------------------|-------------------------|
| LEISURE | 932 visitors | 1,684 visitors | 3,861 visitors |
| Day trip | 4% | 14% | <i>Sample too small</i> |
| Registered Accommodation | 84% (av. 3.0 nights) | 46% (av. 5.0 nights) | 42% (av. 8.1 nights)* |
| Staying with Friends/Relatives | 12% | 40% | 58% |
| WORK RELATED | 1,023 visitors | 247 visitors | 564 visitors |
| Day trip | 75% | 44% | 7% |
| Registered Accommodation | 25% (av. 1.7 nights) | 56% (av. 1.7 nights)) | 93% (av. 5.8 nights)** |
| Staying with Friends/Relatives | <i>Sample too small</i> | <i>Sample too small</i> | <i>Sample too small</i> |
| OTHER PURPOSES | 284 visitors | 108 visitors | 296 visitors |
| Day trip | 17% | <i>Sample too small</i> | <i>Sample too small</i> |
| Registered Accommodation | 79% (av.3.0 nights) | <i>Sample too small</i> | 70% (av. 5.1 nights) |
| Staying with Friends/Relatives | 4% | <i>Sample too small</i> | 30% |

Figure 7

Notes:

* The high proportion of SEASONAL self-catering accommodation v hotel/guest accommodation on island as well as and the numbers of persons staying per unit, increases summer leisure visitors' average length of stay.

** The length of stay for Spring/summer business/work-related visitors from Southampton higher as a result of contract staff being brought over to work on one construction project.

SCHEDULED LITTLE FERRY SEA PASSENGER SERVICE

(End May 2019 to End Sept 2019 inclusive)

OVERALL SERVICE

(Sailings and passenger numbers provided by the Little Ferry Company)

The service was planned to operate from 25 May to 29 September inclusive but 23% of all sailings were cancelled for the following reasons:

- First three days of operation cancelled because of technical reasons;
- There were very few weather related cancellations in June and July but between 5 August and 18 August, 45% of all sailings were cancelled due to adverse sea conditions;
- There were a number of cancellations in early September but all sailings (apart from just two) from 18 September to 29 September were cancelled because of weather.

In total, 2,163 passengers travelled from Alderney to Guernsey and 2,169 passengers travelled from Guernsey to Alderney (4,332 movements in total).

PASSENGER EXIT SURVEY FINDINGS

From the Passenger Exit Survey (sample of 500 interviews (degree of error +/-3%)), 59% (1,276) of passengers were visitors to the island and 41% (887) were Alderney residents.

- Of the 59% of passengers using the service who were visitors to the Island (1,276 persons), the overwhelming majority were travelling for leisure purposes with:
 - 63% (804 persons) originating from UK or elsewhere (of which 33% (265) were on a day trip and 67% (539) staying in the island for an average of 5.5 nights (VFR, registered accommodation and the Campsite))
 - 37% (472 persons) being Guernsey residents (of which just over half (245) were on a day trip and the other half (227) staying in the island for an average of just over 3 nights (VFR, registered accommodation and the Campsite))
- Of the 41% of passengers using the service who were Alderney residents (887 persons),
 - 62% were for leisure purposes,
 - 8% for business,
 - 12% for medical referrals,
 - 18% for other reasons (sport, personal, etc.).

December 2019