Island Global Research

SATISFACTION WITH AIR AND SEA TRAVEL

2019 TRAVEL & TOURISM SURVEY
JERSEY, GUERNSEY & THE ISLE OF MAN

July 2019

CONTENTS

An online survey about travel and tourism was conducted between 24 May and 10 June 2019 in Guernsey, Jersey and the Isle of Man. This report presents the findings relating to questions about travel links for getting off your island.

Results are first presented for each island. Finally, satisfaction with travel links in each island is benchmarked against one another.

1. Introduction and Approach 3
2. Jersey 4
3. Guernsey 10
4. Isle of Man 16
5. Satisfaction across the Crown Dependencies 22
6. Appendix A: Profile of Respondents 24
7. Appendix B: Interpreting box plots 25

About Island Global Research

Island Global Research is a market research and consultancy company. We regularly conduct research for clients in the Crown Dependencies.

From time to time, we undertake our own research that we hope will be of interest to people living in Jersey, Guernsey and the Isle of Man. This is one of our surveys, and is an opportunity for us to give back to the Island Communities who participate in our market research. We hope that you find the results interesting and that they are useful for islanders with an interest in this topic.

We are very grateful to everyone who completes our surveys. If you would like to participate in our surveys or hear more from us, please go to our website to find out more: www.islandglobalresearch.com.

Island Global Research is part of the BWCI Group, and a member of Abelica Global.

1. INTRODUCTION AND APPROACH

An online survey about travel and tourism was conducted between 24 May and 10 June 2019 in Guernsey, Jersey and the Isle of Man. The survey had a tremendous response and was completed by 2,447 respondents across the three islands, of which 795 were in Jersey, 978 were in Guernsey and 674 were in the Isle of Man.

This report presents the findings of the 'off-island travel links' module found within the survey. Questions were structured to ask the following:

- Whether had travelled off-island in the past 12 months, and if so, reasons for travel, mode of travel and which routes are most often used.
- Satisfaction with off-island flights and ferries among those who had experienced each mode of travel in the past 12 months
- The importance of selected factors when travelling for leisure and when travelling for business.

The results are representative of the adult population of each island. Survey weights were used to adjust for age and gender differences between the sample and the profile of the adult population in each island. The profile of people who completed the survey is available in appendix A.

The majority of people have travelled off island in the last 12 months.

- Over 90% of residents in the three islands have travelled for leisure in the last 12 months
- Almost half of residents in Jersey and Guernsey, and just over a third in the Isle of Man, have travelled for business in that time period.

Air is the primary mode of transport in all three islands.

- 85% of Manx residents and 87% of Guernsey residents have travelled by air in the last 12 months.
- This rises to 91% in Jersey, where in comparison with Guernsey, there is higher satisfaction with the cost flights.
- Air is used extensively by both business and leisure travellers.

However, sea links are also used by a large proportion of people.

- Around 60% of Guernsey and Jersey residents have travelled by sea in the last 12 months.
- This increases to 71% in the Isle of Man, where higher levels of satisfaction can be seen with the ferry services.
- Ferries are more likely to be chosen for leisure trips than business trips.

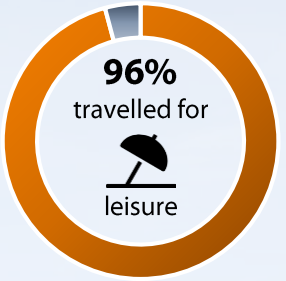
This 2019 survey was completed by 2,447 residents in the Crown Dependencies.

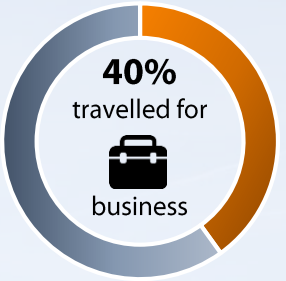
	2019
Jersey	795 residents
Guernsey	978 residents
Isle of Man	674 residents

2. JERSEY

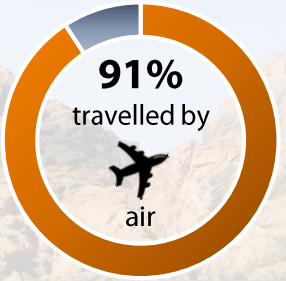
KEY FINDINGS

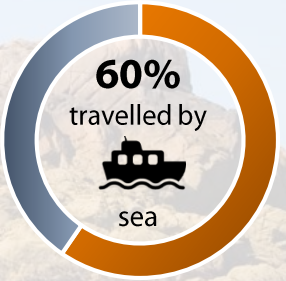
Most people in Jersey travelled off-island last year.





Air travel is the most popular mode of travel for getting off the island. In the past 12 months 91% of people travelled by air from Jersey, 60% of people had travelled by sea and 53% of people had used both modes of travel.





Gatwick is the most popular route. It is often used by 86% of leisure travellers and 78% of business travellers. St Malo is also a popular destination, a route which 51% of leisure travellers reported using frequently.

Air travellers tended to be more satisfied than those travelling by sea. This was apparent in terms of reliability and choice of destinations, though there are low levels of satisfaction with the cost for both modes of travel.

Reliability is a priority for both leisure and business travellers. Cost is relatively more important for those travelling for leisure than for business purposes, while business travellers are more likely to prioritise departure times.

KEY ROUTES FROM JERSEY

Respondents were asked which modes of travel they had used for business and leisure in the last 12 months, and which routes they use most often.

Most people in Jersey had travelled off-island in the past 12 months. 96% of people had travelled for leisure and 40% had travelled for business reasons.

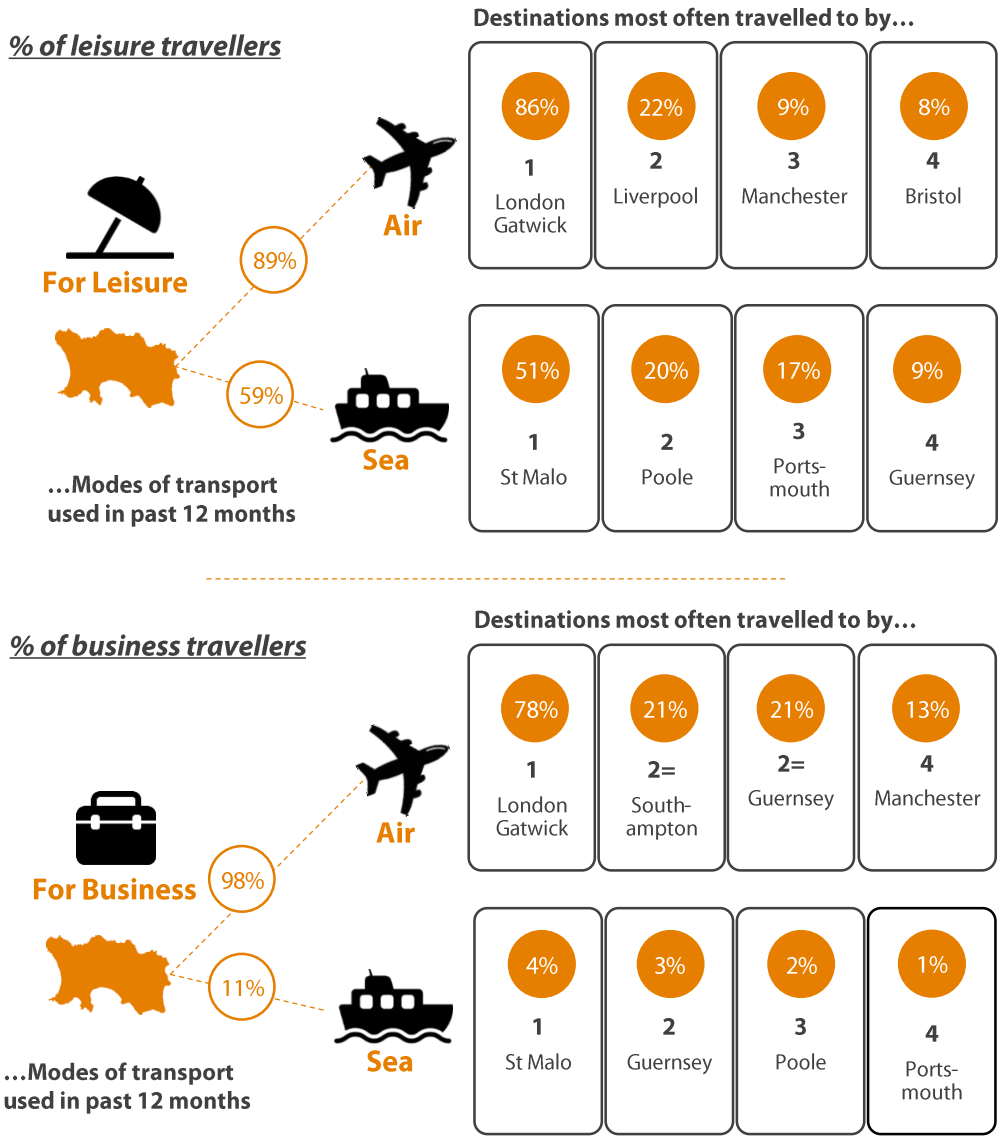
Leisure and business travellers were asked which destinations they have most often travelled to for leisure and/or business purposes.

Air is used extensively by both business and leisure travellers:

- 89% of leisure travellers and 98% of business travellers had travelled by air at least once in the last year.
- Gatwick is the most commonly used route: 86% of leisure travellers and 78% of business travellers identified London Gatwick as a key route. Liverpool was the second most popular destination for leisure travellers, and is often used by 22% of leisure travellers. Southampton and Guernsey were key destinations for business travellers.

Sea is more likely to be chosen for leisure trips than business trips:

- 59% of leisure travellers have travelled by ferry once or more in the last 12 months. St Malo is the most used ferry route and is a key destination for 51% of leisure travellers. 20% of leisure travellers said they often travel to Poole and 17% often travel to Portsmouth.
- 11% of business travellers have chosen to use the ferry once or more in the last 12 months.



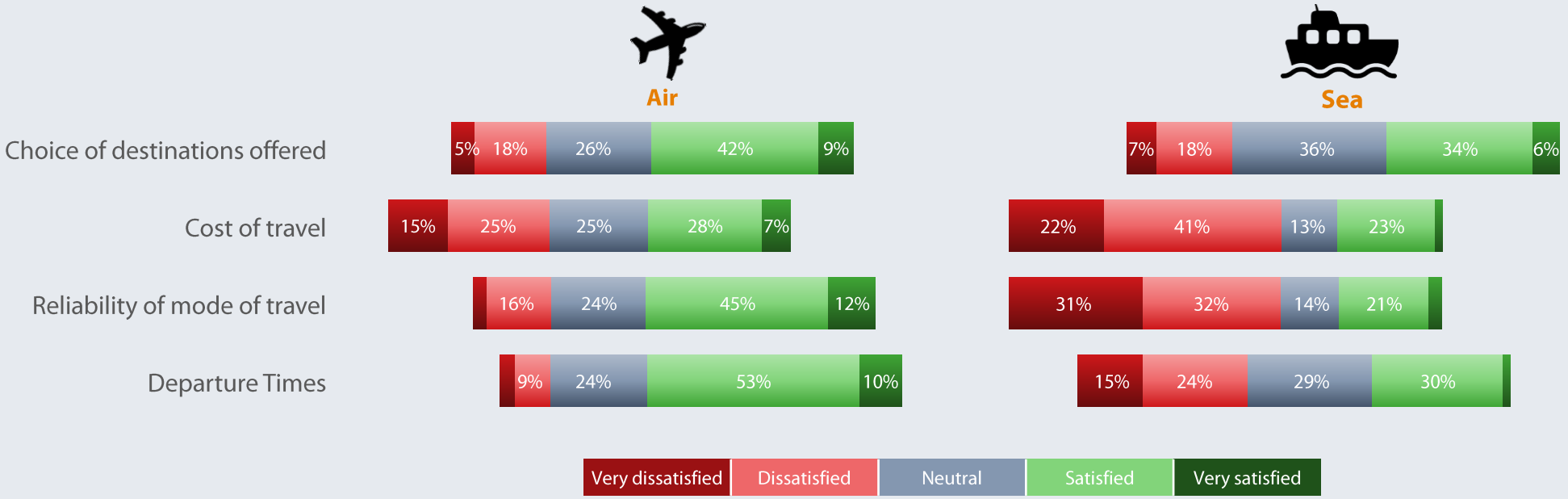
SATISFACTION WITH AIR AND SEA TRAVEL

Respondents rated how satisfied they were with the choice of destinations offered, the cost of travel, the reliability and the departure times for each mode of transport they had used to travel off-island in the past 12 months.

Air travellers tended to be more satisfied than those travelling by sea. Over half of people who travelled by air were satisfied or very satisfied with the choice of destinations, reliability of air travel and departure times, while less than 40% of people who had travelled by sea were satisfied or very satisfied with these aspects of sea travel.

The cost of travel was rated poorly for both air and sea travel. 40% of people who had travelled by air and 63% of people who had travelled by sea were dissatisfied or very dissatisfied with the cost of travel. Reliability of sea travel was also a key concern, with 63% of people who had travelled by ferry dissatisfied or very dissatisfied with the reliability.

Satisfaction with each aspect by air and by sea is very similar for those both leisure and business travellers. There are, however, some differences in how important each factor is, as demonstrated overleaf.



PRIORITIES FOR LEISURE TRAVELLERS

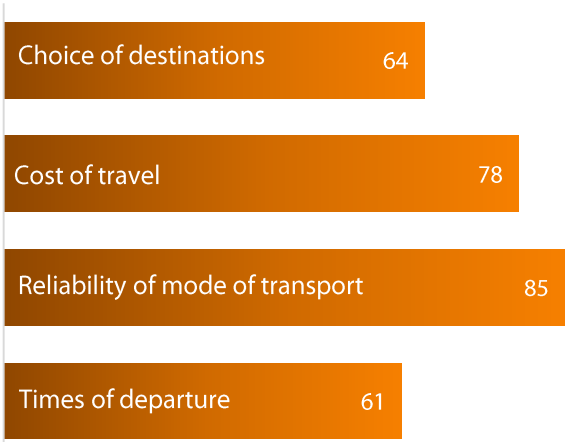
Respondents were asked how important each aspect is when travelling for leisure, on a scale from 'not at all important' to 'very important'. Responses have been converted into a score of relative importance.

The graph to the right demonstrates that although all factors are important, reliability and cost are more important than choice of destinations and times of departures when travelling for leisure.

Below, importance is plotted against satisfaction for each mode of transport. This helps to identify priorities for improvement. Key drivers of satisfaction for the leisure market with the most room for improvement are:

- the cost of air travel
- the reliability and cost of ferry services.

Relative Importance for Leisure



Minimum possible score: -100 (least important)
Maximum possible score: +100 (most important)

Importance for leisure vs Satisfaction when travelling by….

Air

Sea

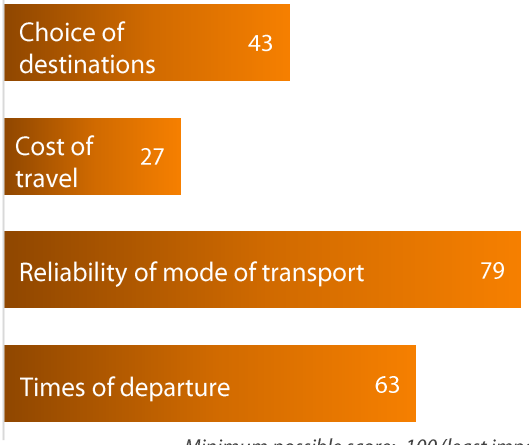
PRIORITIES FOR BUSINESS TRAVELLERS

Respondents were asked how important each factor is when travelling for business, on a scale from 'not at all important' to 'very important'. Responses have been converted into a score of relative importance.

The graph to the right demonstrates that reliability is again the most important factor. However, departure times are more important and cost is much less important when travelling for business than for leisure. Below, importance is plotted against satisfaction for each mode of transport. This helps to identify priorities for improvement. With the business market in mind:

- the reliability of air travel warrants attention due to the high importance of this factor.
- the reliability of ferry services is a key driver for satisfaction and has the most room for improvement.

Relative Importance for Business

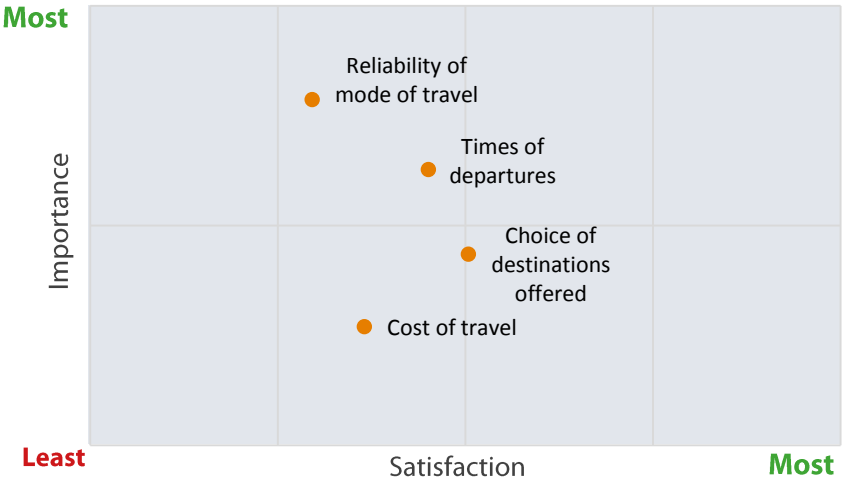


Minimum possible score: -100 (least important)
Maximum possible score: +100 (most important)

Importance for business vs Satisfaction when travelling by....

Air

Sea



The results of the survey and the comments left by respondents highlight the importance of off-island travel for both leisure and business purposes.

The feedback indicates people would like to see transport links improved. Some of the lowest levels of satisfaction are among those who travelling by sea. The reliability and cost of travel are also areas of concern. Cost is especially important for local residents when they travel for leisure.

Cost

40% of people are dissatisfied with the cost of air fares and 63% are dissatisfied with the cost of ferries. The comments reflected these levels of dissatisfaction, with a large number discussing how cost of travel needs to improve and is perceived to be getting worse.

Reliability

The survey shows how important reliability is for both business and leisure travel. The comments demonstrate clear frustration with the lack of reliability of the sea links, in line with the earlier findings. There were also a few negative comments left regarding the reliability of particular airline(s), with choice of carrier often influenced by who is perceived to be more reliable.

Choice of destinations

Just under 40% are dissatisfied/very dissatisfied with the departure times of the ferries. Although departure times were found to be more important for business than leisure, it is clear from the comments that improved ferry timings, which would more easily allow day trips to Guernsey and short breaks to France, would be welcomed by a wide range of people.

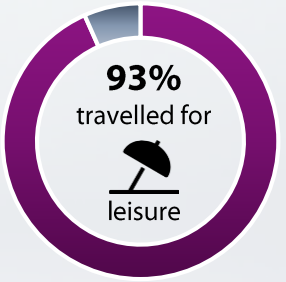
Departure Times

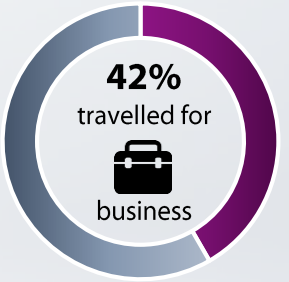
Although choice of destinations was not found by the survey to be critical or receive very high levels of dissatisfaction, the comments suggest that a wider range of direct flights to other destinations in Europe, including France, would be welcome.

3. GUERNSEY

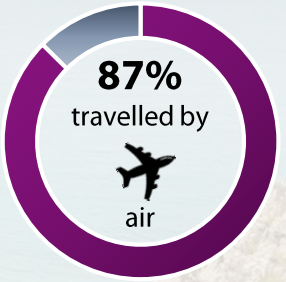
KEY FINDINGS

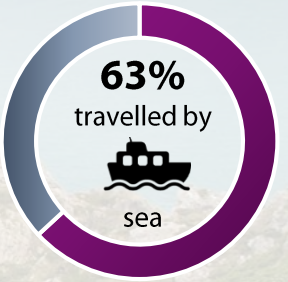
Most people in Guernsey travelled off-island last year.





Air travel is the most popular mode of travel for getting off the island. In the past 12 months 87% of people travelled by air from Guernsey, 63% of people had travelled by sea and 55% of people had used both modes of travel.





Gatwick is the most popular route. It is often used by 81% of leisure travellers and 72% of business travellers. 35% of leisure travellers often take the ferry to St Malo, compared to 51% in Jersey.

Air travellers tended to be more satisfied than those travelling by sea, though there are low levels of satisfaction with the cost for both modes of travel.

Reliability is a priority for both leisure and business travellers. Cost of travel is also important for leisure travellers, while business travellers prioritise departure times over the cost.

KEY ROUTES FROM GUERNSEY

Respondents were asked which modes of travel they had used for business and leisure in the last 12 months, and which routes they use most often.

Most people in Guernsey had travelled off-island in the past 12 months. 93% of people had travelled for leisure and 42% had travelled for business reasons.

Leisure and business travellers were asked which destinations they have most often travelled to for leisure and/or business purposes.

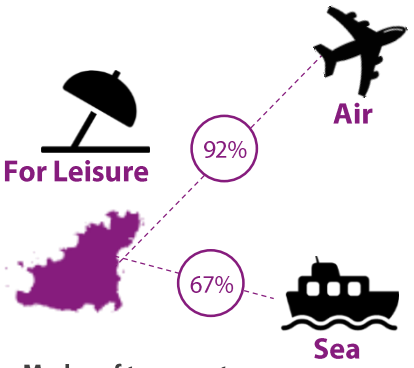
Air is used extensively by both business and leisure travellers:

- 92% of leisure travellers and 98% of business travellers have chosen to fly off-island at least once in the last year.
- Gatwick is the most commonly used route: 81% of leisure travellers and 72% of business travellers identified London Gatwick as a key route.
- Southampton is the second most popular route for both leisure and business travellers. Also, almost 30% of business travellers said Jersey is a key route.

Sea is more likely to be chosen for leisure trips than business trips:

- Two thirds of leisure travellers have chosen to use the ferry once or more in the last 12 months. St Malo and Poole are the ferry routes most often used, with 35% of leisure travellers reporting they often use these routes.
- Almost a quarter of business travellers have used the ferry once or more in the last 12 months. Poole is the route most frequently used by this group (often used by 12% of business travellers) followed by Portsmouth and Jersey.

% of leisure travellers

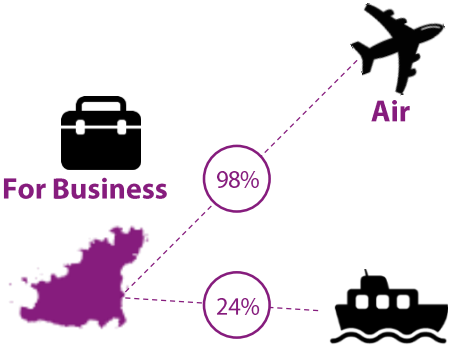


…Modes of transport used in past 12 months

Destinations most often travelled to by…

81%	41%	23%	15%
1 London Gatwick	2 South-ampton	3 Manchester	4 Jersey
35%	35%	26%	21%
1= St Malo	1= Poole	3 Jersey	4 Ports-mouth

% of business travellers



…Modes of transport used in past 12 months

Destinations most often travelled to by…

72%	35%	29%	14%
1 London Gatwick	2 South-ampton	3 Jersey	4 Manchester
12%	8%	5%	1%
1 Poole	2 Ports-mouth	3 Jersey	4 St Malo

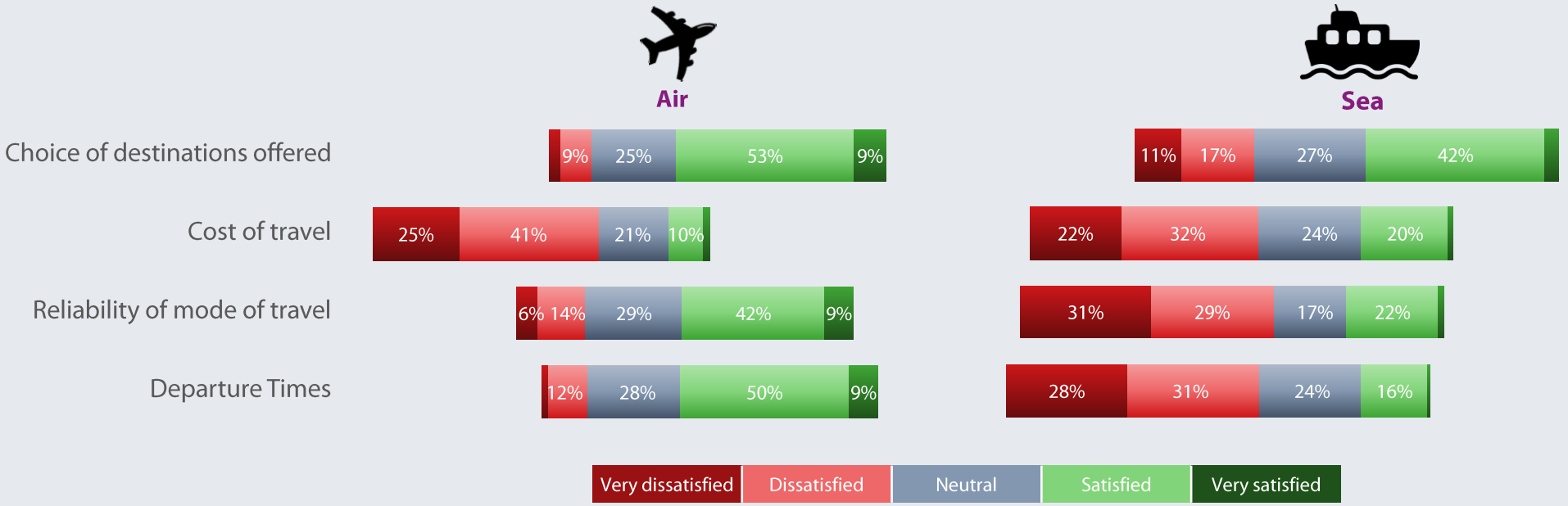
SATISFACTION WITH AIR AND SEA TRAVEL

Respondents rated how satisfied they were with the choice of destinations offered, the cost of travel, the reliability and the departure times for each mode of transport they had used to travel off-island in the past 12 months.

Air travellers tended to be more satisfied than those travelling by sea. Over half of people who travelled by air were satisfied or very satisfied with the choice of destinations, reliability of air travel and departure times, though the cost of air travel is a concern with 66% of people dissatisfied with the cost of flights.

There is considerable dissatisfaction with all aspects of travelling by sea. Around 60% of people are dissatisfied/very dissatisfied with the departure times and reliability of ferries available, and 54% rated the cost of ferries negatively.

Satisfaction with each factor by air and by sea is very similar for those both leisure and business travellers. There are, however, some differences in how important each factor is, as demonstrated on the next two pages.



PRIORITIES FOR LEISURE TRAVELLERS

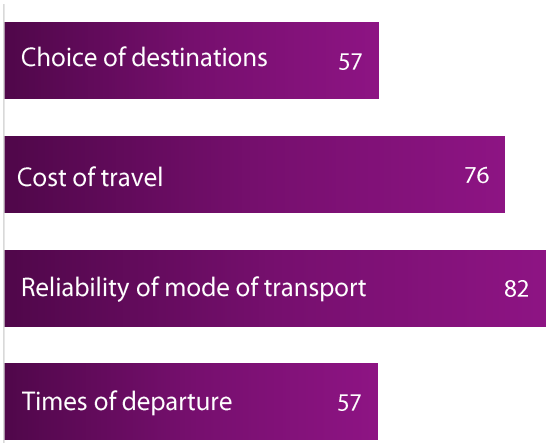
Respondents were asked how important each factor is when travelling for leisure, on a scale from 'not at all important' to 'very important'. Responses have been converted into a score of relative importance.

The graph to the right demonstrates that although all factors are important, reliability and cost are more important than choice of destinations and times of departures when travelling for leisure.

Below, importance is plotted against satisfaction for each mode of transport. This helps to identify priorities for improvement. Key drivers of satisfaction for the leisure market with the most room for improvement are:

- the cost of air travel
- the cost and reliability of ferry services, followed by departure times.

Relative Importance for Leisure



Minimum possible score: -100 (least important)
Maximum possible score: +100 (most important)

Importance for leisure vs Satisfaction when travelling by….

Air

Sea

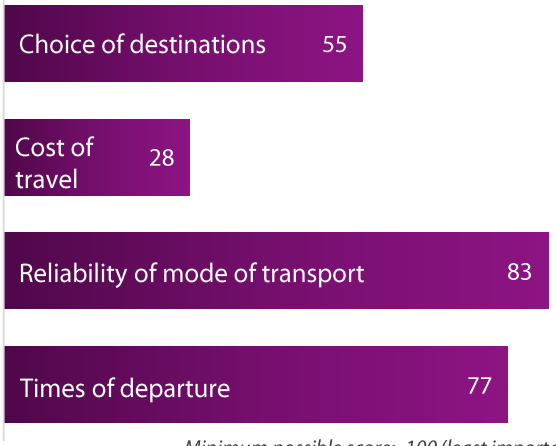
PRIORITIES FOR BUSINESS TRAVELLERS

Respondents were asked how important each factor is when travelling for business, on a scale from 'not at all important' to 'very important'. Responses have been converted into a score of relative importance.

The graph to the right demonstrates that reliability is again the most important factor. However, departure times are more important and cost is much less important when travelling for business than for leisure. Below, importance is plotted against satisfaction for each mode of transport. This helps to identify priorities for improvement. With the business market in mind:

- the reliability of air travel warrants attention due to the high importance of this factor, as does the cost of flights due to very low levels of satisfaction.
- for ferry services, key drivers of satisfaction with the most room for improvement are reliability and departure times.

Relative Importance for Business



Minimum possible score: -100 (least important)
Maximum possible score: +100 (most important)

Importance for business vs Satisfaction when travelling by....

Air

Sea

The results of the survey and the comments left by respondents highlight the importance of off-island travel for both leisure and business purposes.

The feedback indicates people would like to see transport links improved. The cost of travel was a major concern, and frustration with the reliability was expressed, especially when travelling by ferry.

Cost

The survey shows high levels of dissatisfaction with the cost of travel. Almost all the comments echoed this, and a number suggested that they would travel more frequently were it more affordable to do so. The high cost of booking at short notice was frequently discussed. Many perceive Jersey to be in a superior position with regards to the cost of flights and choice of airlines.

Reliability

The survey shows how important reliability is for both business and leisure travel. The comments demonstrate clear frustration with the lack of reliability of the sea links, in line with the earlier findings. Many of the reliability issues are perceived to be within the ferry operator's control e.g. choice of vessel.

Departure Times

Around 60% are dissatisfied/very dissatisfied with the departure times of the ferries. Although departure times were found to be more important for business than leisure, it is clear from the comments that improved ferry timings which would more easily allow day trips to Jersey and short breaks to France would be welcomed by a wide range of people. Equally, the late night sailings to/from the UK were criticised.

Other comments

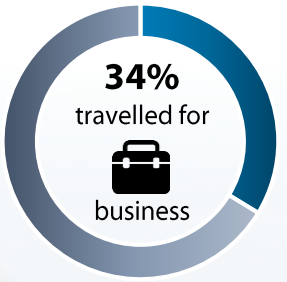
Air and sea links to/from Alderney were not specifically focused on in the survey. There were, however, comments left strongly recommending improved travel links between Alderney and Guernsey/UK.

Mixed views on Guernsey airport's runway length were expressed.

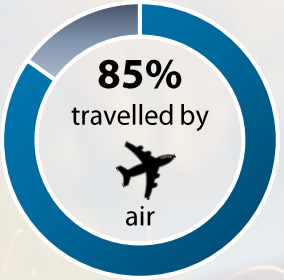
4. ISLE OF MAN

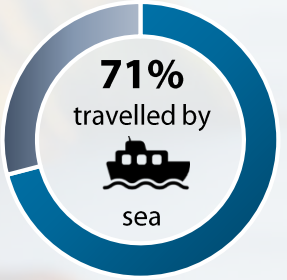
KEY FINDINGS

Most people in Isle of Man travelled off-island last year.



Air travel is the most popular mode of travel for getting off the island, though many people also travel by ferry.
In the past 12 months 85% of people travelled by air from the Isle of Man, 71% of people had travelled by sea and 58% of people had used both modes of travel.





Gatwick, Liverpool and Manchester are the most popular destinations.
Heysham and Liverpool Birkenhead are also regularly used ferry crossings by around half of leisure travellers.

Similar levels of satisfaction among air and sea travellers.
The cost of travel was the main concern.

Reliability is a priority for both leisure and business travellers. Cost is relatively more important for those travelling for leisure than for business purposes, while business travellers are more likely to prioritise departure times.

KEY ROUTES FROM THE ISLE OF MAN

Respondents were asked which modes of travel they had used for business and leisure in the last 12 months, and which routes they use most often.

Most people in the Isle of Man had travelled off-island in the past 12 months. 96% of people had travelled for leisure and 34% had travelled for business reasons.

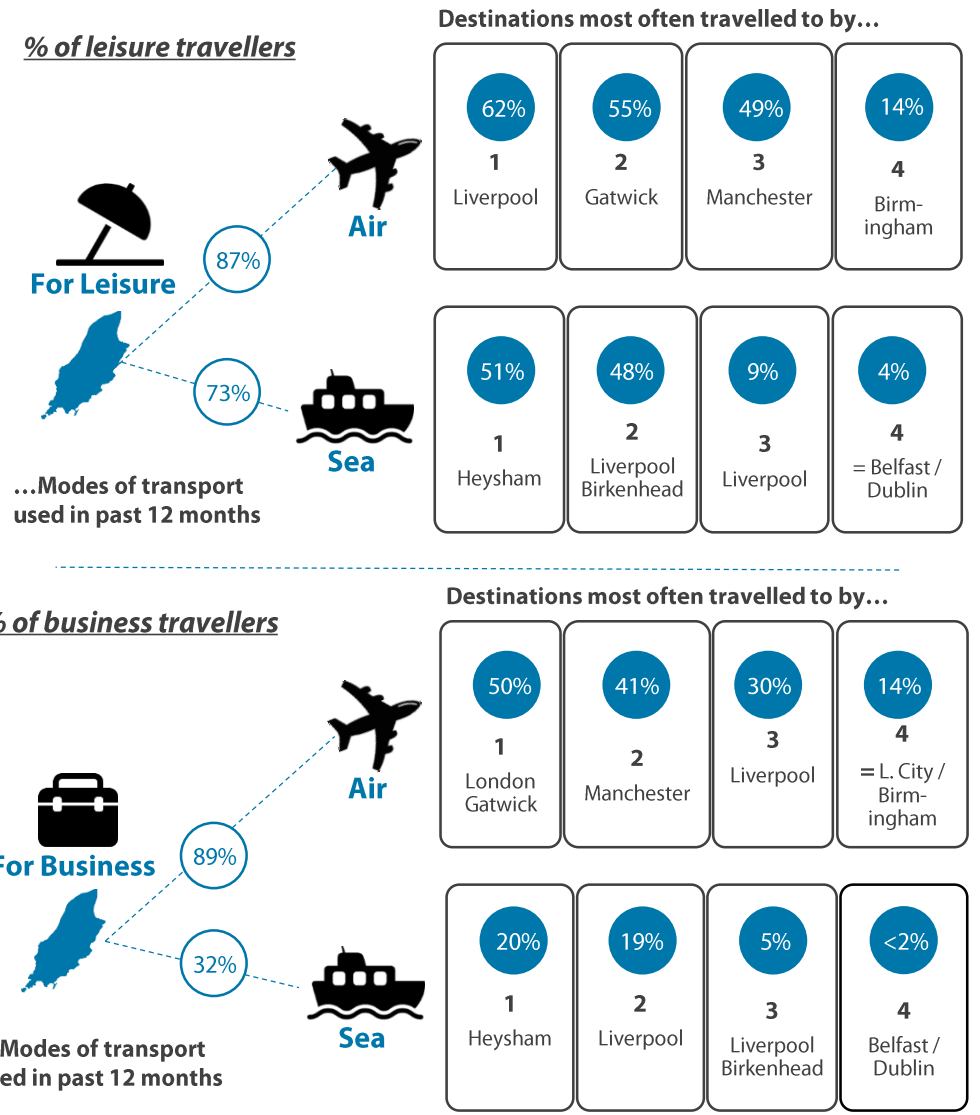
Leisure and business travellers were asked which destinations they have most often travelled to for leisure and/or business purposes.

Air is used extensively by both business and leisure travellers:

- 87% of leisure travellers and 89% of business travellers have chosen to fly off-island at least once in the last year.
- Liverpool is the most commonly used route for leisure, and Gatwick for business. Manchester is also a widely used route.

Sea is more likely to be chosen for leisure trips than business trips:

- 73% of leisure travellers have chosen to use the ferry once or more in the last 12 months. Heysham is the ferry route most often used and is often used by 51% of leisure travellers.
- Almost a third of business travellers have chosen to use the ferry once or more in the last 12 months. Heysham and Liverpool are key routes (20% and 19% of business travellers often use these routes, respectively).



SATISFACTION WITH AIR AND SEA TRAVEL

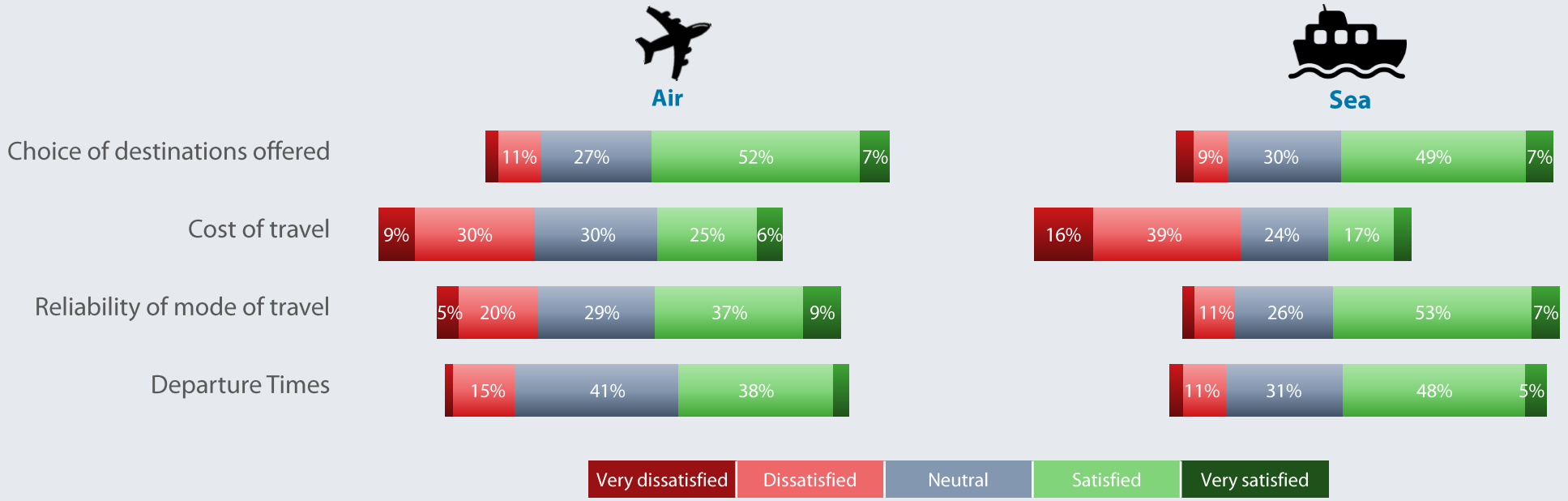
Respondents rated how satisfied they were with the choice of destinations offered, the cost of travel, the reliability and the departure times for each mode of transport they had used to travel off-island in the past 12 months.

Similar levels of satisfaction were reported for travelling by air and sea.

Cost of travel is the main concern, with 39% of air travellers and 55% of sea travellers were dissatisfied or very dissatisfied with the cost.

There is also room to improve reliability and departure times. In contrast, over half of people were satisfied or very satisfied with the choice of destinations

Satisfaction with each factor by air and by sea is very similar for those both leisure and business travellers. There are, however, some differences in how important each factor is, as demonstrated in the following pages.



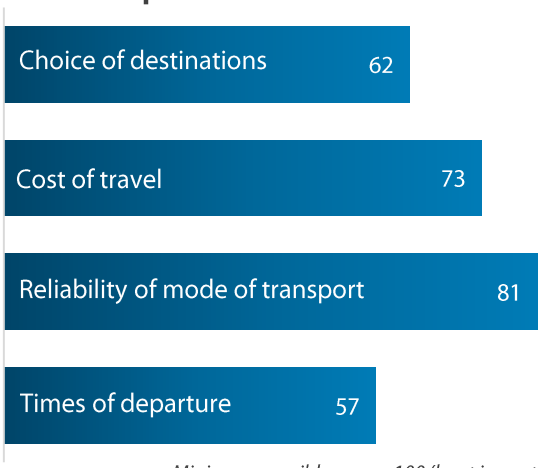
PRIORITIES FOR LEISURE TRAVELLERS

Respondents were asked how important each factor is when travelling for leisure, on a scale from 'not at all important' to 'very important'. Responses have been converted into a score of relative importance.

The graph to the right demonstrates that although all factors are important, reliability and cost are more important than choice of destinations and times of departures when travelling for leisure.

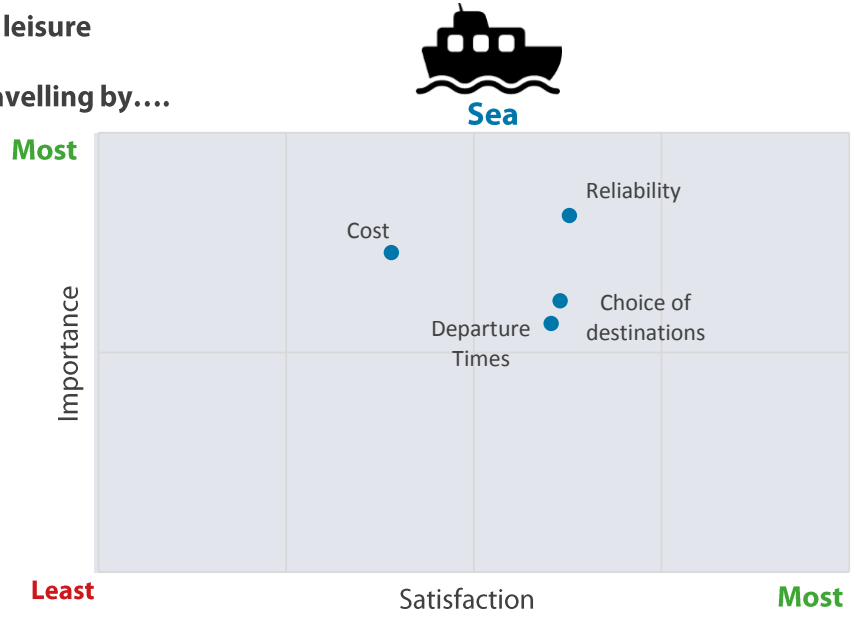
Below, importance is plotted against satisfaction for each mode of transport. This helps to identify priorities for improvement. For the leisure market, cost is a key driver with the most room for improvement. Additionally improvements to the reliability of flights may warrant some attention. For both air and sea transport, there is room to improve satisfaction with departure times but this shouldn't be at the expense of choice of destinations.

Relative Importance for Leisure



Minimum possible score: -100 (least important)
Maximum possible score: +100 (most important)

Importance for leisure vs Satisfaction when travelling by....



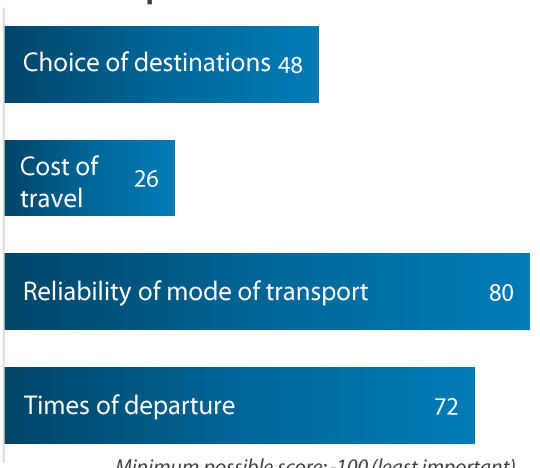
PRIORITIES FOR BUSINESS TRAVELLERS

Respondents were asked how important each factor is when travelling for business, on a scale from 'not at all important' to 'very important'. Responses have been converted into a score of relative importance.

The graph to the right demonstrates that reliability is again the most important factor. However, departure times are more important and cost is much less important when travelling for business than for leisure. Below, importance is plotted against satisfaction for each mode of transport. Key drivers of satisfaction for the business market with the most room for improvement are:

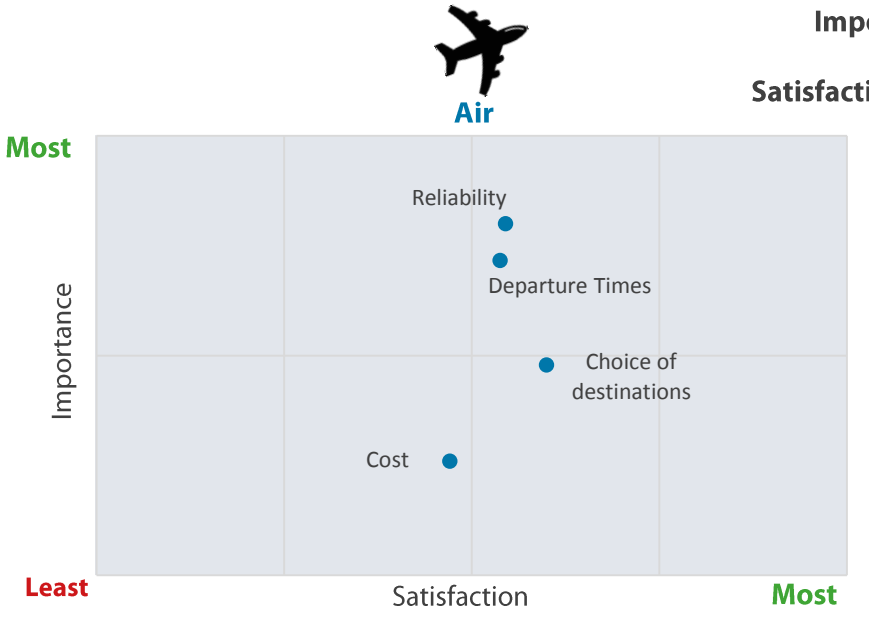
- the reliability and departure times of flights,
- the departure times of ferries.

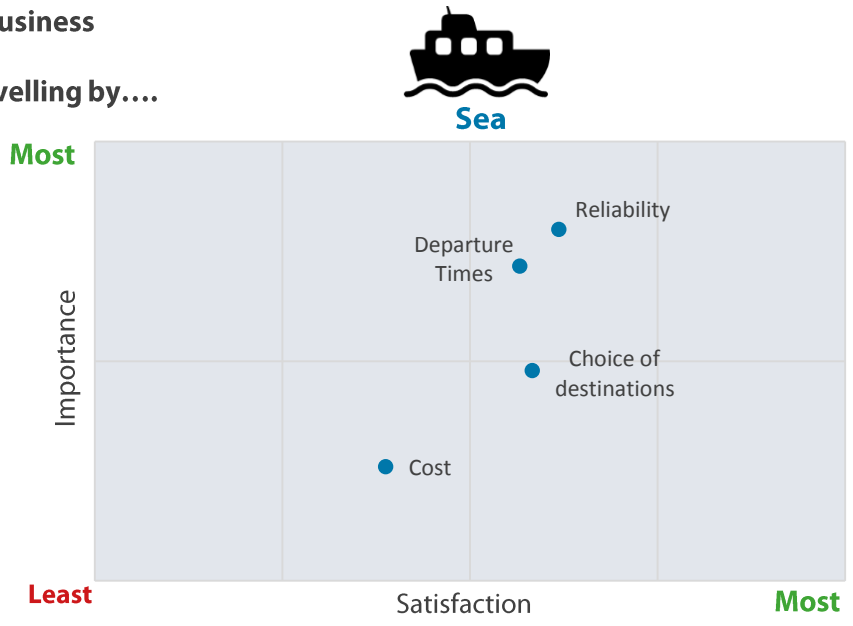
Relative Importance for Business



Minimum possible score: -100 (least important)
Maximum possible score: +100 (most important)

Importance for business vs Satisfaction when travelling by....





The results of the survey and the comments left by respondents highlight the importance of off-island travel for both leisure and business purposes.

The feedback indicates people would like to see transport links improved. The cost of travel was the main concern.

Cost

The survey showed dissatisfaction with the cost of travel, and many of the comments referred to how expensive it can be to get off the island, especially at short notice or during the TT. The comments included suggestions to help ease the cost for locals, such as standard or reduced rate fares.

Reliability

Reliability is important for both business and leisure travel, and this was expressed in the comments. There was some appreciation that flights and ferry crossings are susceptible to external factors, such as the weather, and that this is part of 'island life'. It was noted how concerns about reliability can impact on the cost of a trip, such as including an overnight stay to ensure connection for an onward journey.

Choice of destinations & departure times

Although choice of destinations was not a major concern, some people commented that more direct connections to UK and Europe and a wider choice of departure times, would be welcome. This included improved links to Ireland and Scotland.

Departures times are particularly important to business travellers, but there were also comments from leisure travellers who would like to see this aspect improved for both air and sea links.

Other comments

The port and on-board facilities were not directly asked about in the survey, though there were a few respondents who said that customer service and facilities at the airport could be improved. Issues with baggage allowances not matching up with onwards journey airlines, or being expensive to add on were also noted.

5. COMPARING SATISFACTION ACROSS THE CROWN DEPENDENCIES

Jersey Guernsey Isle of Man

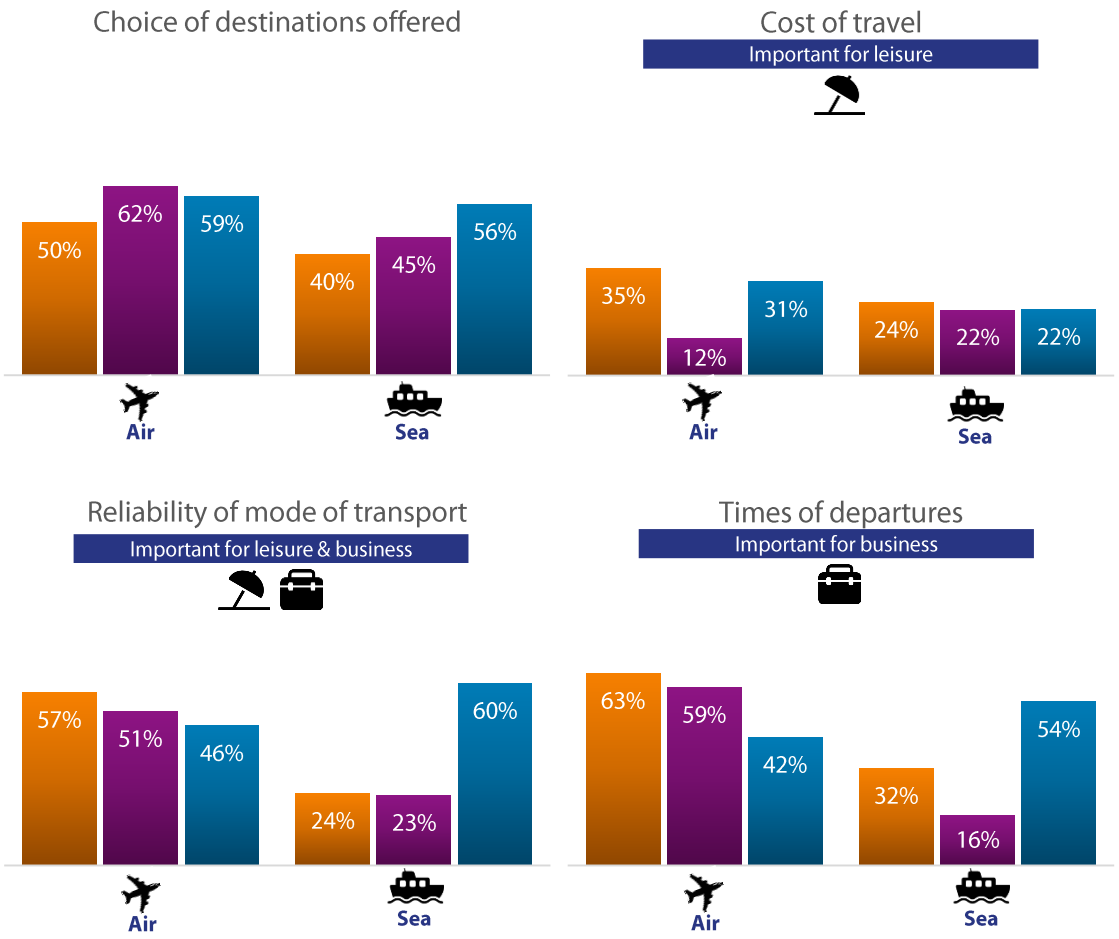
Respondents rated how satisfied they were with the choice of destinations offered, the cost of travel, the reliability and the departure times for each mode of transport they had used to travel off-island in the past 12 months.

The graphs on the right show the percentage of people who were satisfied or very satisfied with each aspect for air and sea travel.

The differences between the islands are interesting and help to show the extent to which there is potential to improve satisfaction.

- **Choice of destinations**: reasonably similar results across the islands, though people from Jersey were the least likely to be satisfied even though they have a wider range of flights than the other islands. The results may reflect differences in expectations of what constitutes a good choice. Also, new air links were recently introduced in Guernsey in the past year.
- **Cost of travel**: this aspect is relatively important for leisure travellers. Cost of travel received the lowest levels of satisfaction in all islands, though there are particularly low levels of satisfaction with cost of air travel in Guernsey.
- **Reliability**: this aspect was rated the most important for both leisure and business travellers. There are stark differences between satisfaction with the reliability of ferry services in Jersey and Guernsey compared to the Isle of Man. The ferries in the Isle of Man also serving a larger share of the local population.
- **Times of departure**: the aspect is relatively important for business travellers. There are large differences with the satisfaction with departure times for sea travel, with much higher rates for the Isle of Man than for Guernsey and Jersey.

% satisfied/very satisfied with…



APPENDIX

Appendix A: Profile of survey respondents

Appendix B: Interpreting important vs satisfaction plots

APPENDIX A: PROFILE OF SURVEY RESPONDENTS

The tables shows the individual and household characteristics of respondents after survey weights have been applied.

Individual Characteristics	JERSEY	GUERNSEY	ISLE OF MAN
Unweighted Base size	*795*	*978*	*674*
Age group			
U40	37%	33%	32%
40-64	45%	43%	43%
65+	17%	24%	23%
Prefer not to say	1%	0%	1%
Gender			
Male	48%	49%	48%
Female	51%	50%	51%
Other	0%	0%	0%
Prefer not to say	1%	1%	0%

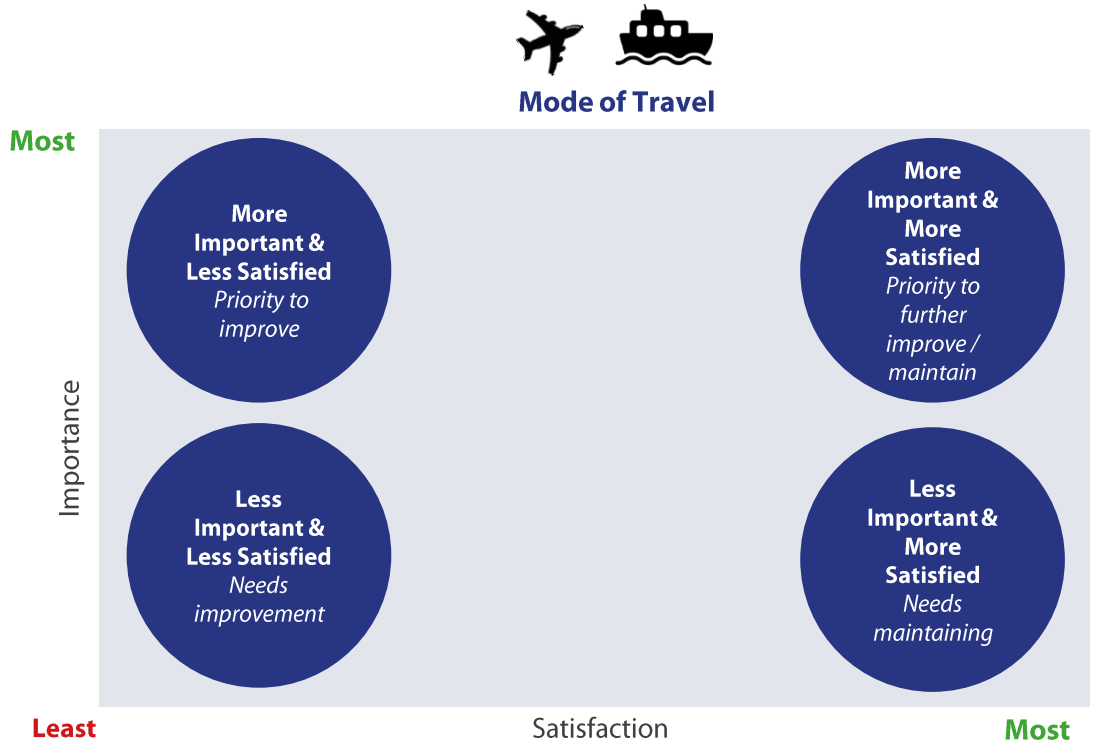
Household Characteristics	JERSEY	GUERNSEY	ISLE OF MAN
Unweighted Base size	*795*	*978*	*674*
Household Composition			
Working Age no children	55%	48%	44%
Working Age with children	19%	18%	25%
Pension Age	16%	20%	18%
Other	9%	13%	10%
Annual Household Income			
£20,000 or less	6%	8%	14%
£20,001 - £40,000	26%	20%	28%
£40,001-£60,000	16%	16%	22%
£60,001-£80,000	14%	14%	12%
£80,001-£100,000	9%	13%	5%
£100,001-£150,000	12%	8%	6%
Over £150,000	4%	5%	1%
Don't Know	1%	2%	3%
Prefer not to say	12%	13%	9%

APPENDIX B: INTERPRETING IMPORTANCE VS SATISFACTION PLOTS

The report plots scores for importance against levels of satisfaction with the reliability, departure times, choice of destinations and cost of air and sea links. This helps to identify priorities for improvement.

There is less satisfaction with factors shown towards the left of the graph. Those closer to the top are more important and therefore could be considered a higher priority to improve than those towards the bottom left of the graph.

There is more satisfaction with factors shown towards the right of the graph. Those closer to the top are more important and therefore could be considered a higher priority to further improve and/or maintain than those towards the bottom right of the graph.



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