Guernsey Air Route Survey 2014

1 Contents

2 Introduction

Commerce and Employment, the States Department with responsibility for developing and maintaining air links, conducted an online air route survey aimed at understanding more about residents' use of Mainland airports. The survey was carried out in May and early June 2014, and was completed in-house.

The air route survey was also an ideal opportunity for the Department to gather intelligence regarding air movement behaviour by business travellers and the general public and to understand the reasoning behind these decisions. The survey also provides information on which to discuss opportunities for the development of new or enhanced air route links in the future.

The following report provides a summary of the main responses and findings of the survey.

3 Executive Summary

3.1 Headline results

- The most popular destinations for Leisure travellers, in terms of the total number of trips made were London Gatwick airport (38.4%), Southampton airport (17.9%) and Jersey airport (11.0%). Not surprisingly these airports were also viewed as the most important by survey respondents.

- For business travellers, London Gatwick airport accounted for nearly half of total trips made (47.0%), underlining the importance of this airport for the business community. The next most popular airport was Jersey (as a final destination) at 24.5% of total business trips.

- Jersey airport as an "en-route" destination is popular both for leisure and business travellers.

- For those travelling onwards to further destinations, Heathrow airport was the most popular UK destination both for leisure travellers and business travellers. For leisure travellers, Geneva, Paris and Zurich were the most popular European onward destinations. For business travellers, the most popular were Amsterdam, Zurich and Paris.

- For those travelling to onward destinations, London Gatwick airport and Southampton airport were the popular choices.

- Price, convenient flight times and a choice of flights were considered either very important or critical to most leisure travellers in terms of their choice of airport. For business travellers, price was less important, whereas convenient flight times and choice of flights were.

- Leisure travellers are more sensitive to price increases in airfares than business travellers.

4 A note on survey responses and other recent surveys

4.1 Departure figures compared to survey responses

There were 342 valid responses to the survey. We believe that this is a strong response from which valid and robust information can be drawn.

Survey respondents were asked to record the number of trips they had made (for leisure and/or business purposes) during 2013 to the various airport destinations served by Guernsey. To test the validity of the responses, these were compared to the actual departure figures recorded in 2013.

As **Figure 1** shows there is a reasonably close match between the survey responses and the actual departure numbers recorded in 2013. Note that for Jersey the survey asked respondents to specify if they were using the airport as a final destination or en route to another airport. The annual airport departure figures do not make this distinction.

Figure 1: % of total trips indicated in the survey compared to % of 2013 recorded airport departures - by destination
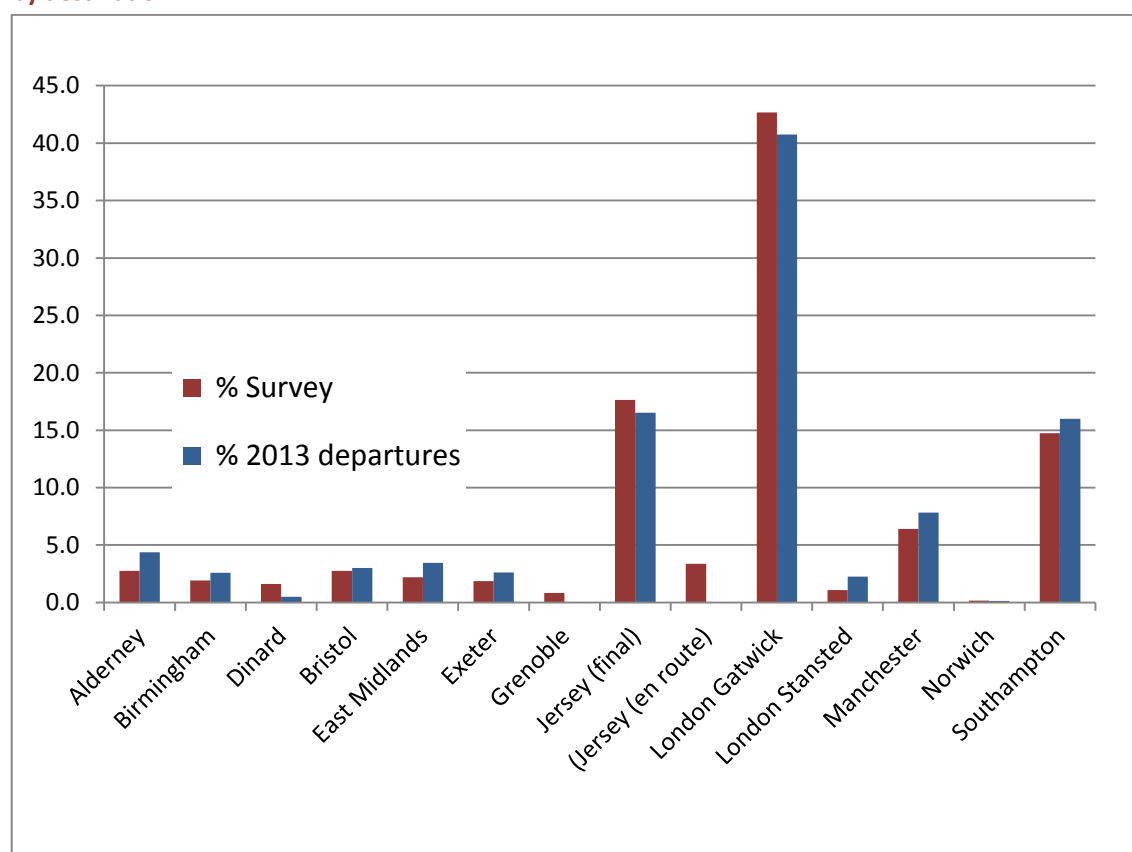
4.2 Guernsey finance survey

The findings of this survey corroborate the conclusions of the recent survey by Guernsey Finance entitled *"Where and how does the Finance Industry want to travel in future".*

This survey was aimed specifically at the Finance Industry and was conducted by Guernsey Finance.

This survey included (inter alia) the following conclusions:

- Currently most business travel is routed through (London) Gatwick, followed by Jersey;

- London is also the principal ultimate destination of current business travel, then Jersey;

- Either enhanced services to Gatwick or new routes to Heathrow or City are viewed as most beneficial, whether for access to London itself or for onward connections.

- When pressed for their most preferred option, new services to Heathrow and/or City came out much more strongly than simply enhancing the Gatwick route; and enhancing the Jersey and Southampton links fell below the demand for new connections to Amsterdam Schiphol or Paris Charles de Gaulle.

These findings are largely corroborated by the findings of the Air Route survey.

5 Number of times travelled to airport destinations

5.1 Percentage of total trips to destinations

Survey respondents were asked how many times they travelled to airport destinations served by Guernsey. Respondents were asked to specify if these were for business or leisure purposes.

Figure 2 and **Table 1** show the % of the total number of trips recorded to each destination split between leisure and business trips.

Figure 2: % of total trips - business and leisure by destination
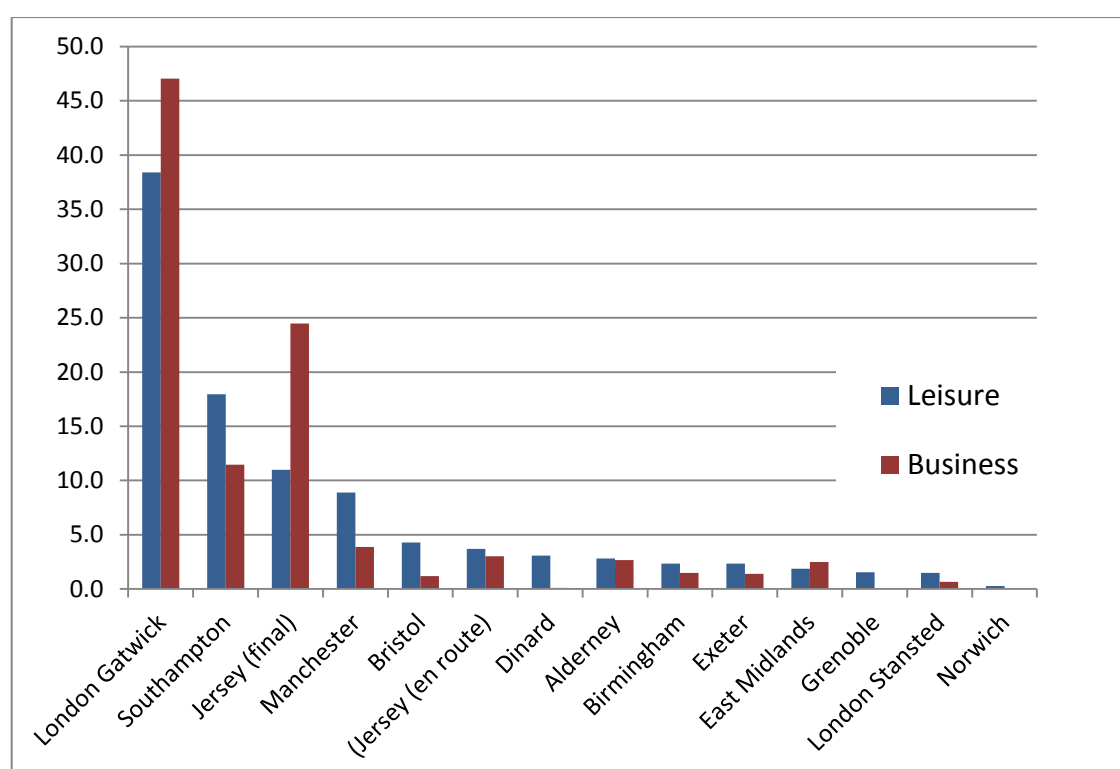
Table 1: % of total trips - business and leisure by destination

% of trips	Leisure	Business
London Gatwick	38.4	47.0
Southampton	17.9	11.5
Jersey (final)	11.0	24.5
Manchester	8.9	3.9
Bristol	4.3	1.2
(Jersey (en route)	3.7	3.0
Dinard	3.1	0.1
Alderney	2.8	2.7
Birmingham	2.3	1.5

Exeter	2.3	1.4
East Midlands	1.9	2.5
Grenoble	1.5	0.1
London Stansted	1.5	0.7
Norwich	0.3	0.1
Total Trips	100.0	100.0

Commentary:

The results show that London Gatwick, Southampton and Jersey (as a final destination) airports are the most frequently travelled to destinations for both business and leisure travellers. These three airports account for 67.3% of total leisure travel and 83% of business travel. There was more business trips recorded to London Gatwick airport and Jersey airport than leisure trips.

For Jersey airport (as a final destination), there were almost twice as many business visitors than leisure visitors. For Alderney airport the split was roughly equal. There was virtually no business travel to Dinard, Grenoble and Norwich (all 0.1%).

5.2 Number of times respondents travelled to destinations served by Guernsey airport

Survey respondents were asked how many times they travelled to destinations from Guernsey for leisure and business purposes

5.2.1 Most popular destinations

Leisure travel

Figure 3 gives an overview of which air routes from Guernsey were used the most by leisure travellers. London Gatwick airport was used (at least once) by 83.6% of respondents, with Southampton airport the second most popular destination at 57.6%. Jersey (as a final destination) was third at 41.5%, but when combined with those using Jersey en route to another destination, the figure rises to 56.4%.

Figure 3: Percentage of survey respondents who travelled to airport destinations at least once - Leisure travellers

Destination	Percentage
Alderney	15.2
Birmingham	9.1
Dinard	11.7
Bristol	15.2
East Midlands	12.6
Exeter	11.1
Grenoble	7.9
Jersey (final)	41.5
(Jersey (en route)	14.9
London Gatwick	83.6
London Stansted	7.6
Manchester	30.1
Norwich	1.5
Southampton	57.6

Business travel

Figure 4: Percentage of survey respondents who travelled to airport destinations at least once - Business travellers

Destination	Percentage
Alderney	12.3
Birmingham	7.6
Dinard	0.9
Bristol	5.6
East Midlands	4.7
Exeter	6.7
Grenoble	0.6
Jersey (final)	33.9
(Jersey (en route)	8.8
London Gatwick	56.7
London Stansted	2.6
Manchester	14.0
Norwich	0.3
Southampton	30.4

For Business travellers, the most popular destination was again London Gatwick airport, with 56.7% of survey respondents indicating that they had travelled to Gatwick at least once for business purposes in 2013 (see **Figure 4**). Unlike the results for leisure travel, the second most popular destination was Jersey airport (33.9%) and the third most popular (Southampton airport) at 30.4%. Manchester airport was fourth at 14.0%, contrasting with the 30.1% who said they travelled their at least once for leisure purposes.

5.2.2 Number of times travelled

Although the percentage of respondents who said they travelled to Gatwick airport for business purposes at least once was lower in percentage terms than those who indicated they travelled there for leisure purposes, the actual number of trips made for business purposes was higher.

This is because the number of <u>multiple trips</u> made for business purposes was higher than for leisure travellers.

Tables 2 and 3 give some further analysis of the number of trips made.

Table 2: Number of times respondents travelled to airport destinations from Guernsey – for leisure purposes

| How many times travelled - numbers	Alderney	Birmingham	Dinard	Bristol	East Midlands	Exeter	Grenoble	Jersey (final)	(Jersey (en route))	London Gatwick	London Stansted	Manchester	Norwich	Southampton
Didn't use route / no response	*290*	*311*	*302*	*290*	*299*	*304*	*315*	*200*	*291*	*56*	*316*	*239*	*337*	*145*
1	38	23	25	25	29	19	24	57	24	26	17	42	3	60
2	3	6	8	10	6	10	1	42	11	52	5	26	1	56
3	3		1	6	4	4	1	13	4	42	2	6		23
4	1	1	2	5	2	1		12	6	46	1	10		13
5	1		2	1	1			2	1	30		3		8
6	3		1	3	1			9	1	35		3	1	11
7										4				
8	2			1		3		1	1	17		2		5
9										1				2
10						1		4	1	16		3		11
11 to 15	1								1	7		8		6
16 to 20								2	1	4	1			1
21+		1	1	1			1			6				1
Total	**342**	**342**	**342**	**342**	**342**	**342**	**342**	**342**	**342**	**342**	**342**	**342**	**342**	**342**
Total Number of Trips	**108**	**89**	**118**	**164**	**72**	**89**	**59**	**420**	**142**	**1468**	**57**	**340**	**11**	**686**

Table 3: Number of times respondents travelled to airport destinations from Guernsey – for business purposes

How many times travelled - numbers	Alderney	Birmingham	Dinard	Bristol	East Midlands	Exeter	Grenoble	Jersey (final)	(Jersey (en route))	London Gatwick	London Stansted	Manchester	Norwich	Southampton
Didn't use route / no response	*300*	*316*	*339*	*323*	*326*	*319*	*340*	*226*	*312*	*148*	*333*	*294*	*341*	*238*
1	14	15	2	8	5	12	1	24	9	21	5	21		30
2	11	5	1	6	3	5	1	22	9	35	1	11	1	32
3	8	1		1	1	3		9	6	12	1	2		7
4	2	3			3	1		8		15		3		11
5		1		3	1			3	1	14	1	4		5
6	3			1	2			11	2	11		1		6
7						1		1		4				
8								7		8		2		3
9								1		1		1		
10	1	1				1		7		22	1	2		2
11 to 15	2							4	2	18		1		4
16 to 20	1							11	1	14				2
21+					1			8		19				2
Total	342	342	342	342	342	342	342	342	342	342	342	342	342	342
Total Number of Trips	99	55	4	44	93	52	3	909	112	1748	25	144	2	426

Commentary:

London Gatwick airport is visited multiple times by the majority of respondents to the survey, both in terms of leisure and business travel. For leisure travel, 260 out of 342 respondents (76%) indicated they had used the airport 2 or more times, and for business trips this number was 173 out of 342 (51%). Noticeably for business travellers, a significant number indicated that they used the route on 10 or more occasions (73 out of 342, or 21% of respondents).

Figure 5: Number of times respondents travelled to airport destinations (including didn't use / don't know) - Leisure travellers
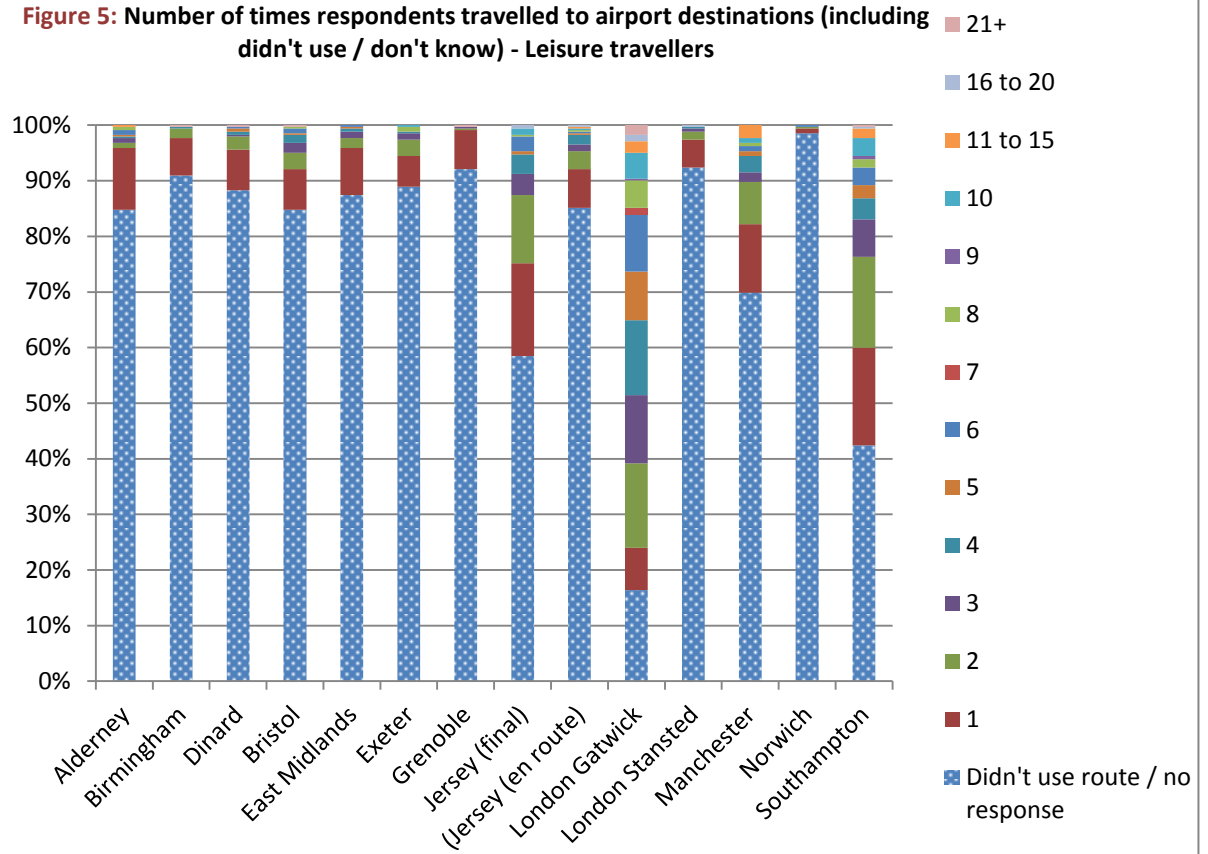
Figure 6: Number of times respondents travelled to airport destinations (including didn't use / don't know) - Business travellers
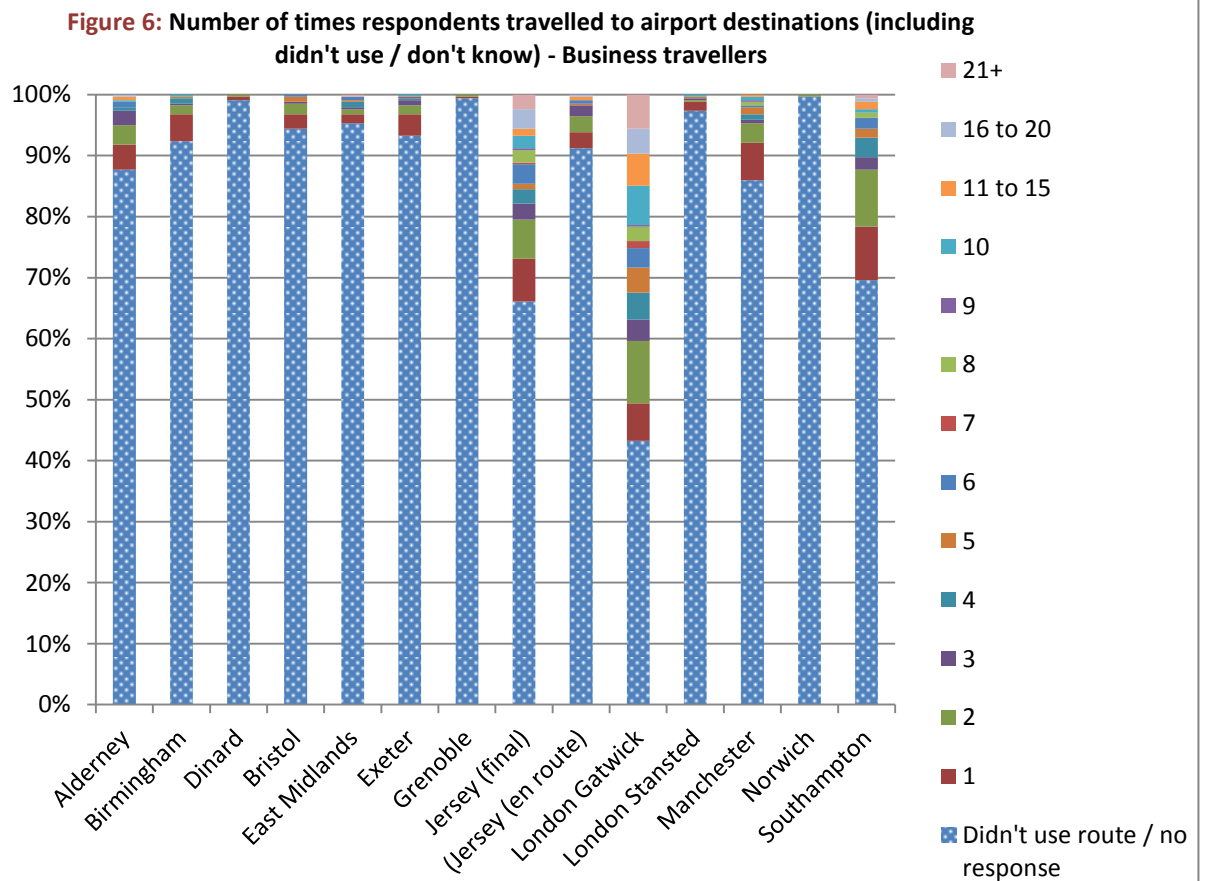
6 Onward travel from airports served by Guernsey

Those survey respondents who travelled onwards to further destinations from their destination airport were asked to which airports they travelled. Results are published below.

6.1 Leisure travel

6.1.1 Onward travel to UK destinations

Table 4: Number of trips made by survey respondents to onward destinations in the UK - leisure travel

Destinations	Number of trips made
London Heathrow	25
Edinburgh	21
Glasgow	8
Newcastle	8
Scotland (airport unspecified)	7
Belfast	6
Devon (airport unspecified)	4
Inverness	3
Aberdeen	2
Exeter	2
London City	2
Cardiff	1
Cornwall (airport unspecified)	1
London Stansted	1
Isle of Man	1

6.1.2 Onward travel to EU destinations

Table 5: Number of trips made by survey respondents to onward destinations in Europe - leisure travel

Destinations	Number of trips made
Geneva	38
Paris	24
Zurich	23
Dublin	19
Germany (airport unspecified)	15
Malaga	13
Amsterdam	12
Turkey (airport unspecified)	12

Nice (France)	11
Majorca	10
Spain (airport unspecified)	10
Alicante	9
Canary Islands	8
Faro	8
Italy (airport unspecified)	8
Rome	7
Croatia (airport unspecified)	7
Portugal (airport unspecified)	6
Tenerife	6
Europe (airport unspecified)	5
Munich	5
Venice	5
Menorca	4
Pisa	4
Vienna	4
Mallorca	3
Istanbul	3
Malta	3
Stockholm	3
Switzerland (airport unspecified)	3
Austria (airport unspecified)	3
Denmark (airport unspecified)	3
Greece (airport unspecified)	3
Ibiza	3
Prague	3
Naples	3
France (airport unspecified)	2
Grenoble	2
Barcelona	2
Lanzarote	2
Lisbon	2
Berlin	2
Chambery (France)	2
Madrid	2
Russia (airport unspecified)	2
Marseilles	2
Rhodes	2
Riga	2
Verona	2
Serbia	1
Bulgaria	1
Corfu	1

Crete	1
Cyprus	1
Gibraltar	1
Luxembourg	1
Sweden	1
Monaco	1
Salzburg	1
Algarve	1
Avignon	1
Azores	1
Biarritz	1
Budapest	1
Florence	1
Kaunas	1
Kefalonia	1
Marbella	1
Moscow	1
Murcia	1
Oslo	1
Palermo	1
Palma	1
Perpignan	1
Sicily	1
Strasbourg	1
Valencia	1
Ireland (airport unspecified)	1

6.1.3 Onward travel outside of Europe

Table 6: Number of trips made by survey respondents to onward destinations outside Europe – leisure travel

Destinations	Number of trips made
USA (airport unspecified)	21
New York	15
Dubai	12
Australia (airport unspecified)	10
Caribbean	10
South Africa (airport unspecified)	8
Canada (airport unspecified)	7
Egypt (airport unspecified)	7
Mexico (airport unspecified)	6
Florida	5
Barbados	5

St Lucia	5
Madeira	5
Cape Town	4
New Zealand (airport unspecified)	4
Maldives	4
Oman (airport unspecified)	4
Kenya (airport unspecified)	3
Singapore	3
Sydney	3
Orlando	3
Mauritius	3
Porto	3
Bali	2
Hong Kong	2
LA	2
Las Vegas	2
Boston	2
San Francisco	2
Sri Lanka (airport unspecified)	2
Thailand (airport unspecified)	2
Cuba	2
Cape Verde	2
Johannesburg	2
Marrakech	2
Washington DC	1
South America (airport unspecified)	1
South Korea (airport unspecified)	1
Japan (airport unspecified)	1
Middle East	1
North Korea	1
Abu Dhabi	1
Antigua	1
Dominican Republic	1
Dubai	1
Grand Cayman	1
Odessa	1
Tanzania	1
Trinidad & Tobago	1

6.2 Business Travel

6.2.1 Onward travel to UK destinations

Table 7: Number of trips made by survey respondents to onward destinations in the UK – business travel

Destinations	Number of trips made
Heathrow	30
Edinburgh	17
Glasgow	13
Isle of Man	11
London City	11
Newcastle	8
Birmingham	2
Aberdeen	1
Leeds	1
UK (airport unspecified)	1
Belfast	1

6.2.2 Onward travel to European destinations

Table 8: Number of trips made by survey respondents to onward destinations in Europe – business travel

Destinations	Number of trips made
Amsterdam	39
Zurich	33
Paris	22
Geneva	9
Gibraltar	9
Copenhagen	7
Dublin	6
Switzerland (airport unspecified)	6
Hamburg	4
Luxembourg	4
Malta	4
Cyprus	3
Germany (airport unspecified)	3
Liechtenstein	3
Milan	3
Moscow	3
Rome	3
Strasbourg	3
Brussels	2
Istanbul	2
Lisbon	2

Lithuania	2
Norway (airport unspecified)	2
Barcelona	1
Budapest	1
Denmark (airport unspecified)	1
Ireland (airport unspecified)	1
Italy (airport unspecified)	1
Kiev	1
Madrid	1
Malaga	1
Netherlands (airport unspecified)	1
Nice	1
Spain (airport unspecified)	1
Sweden (airport unspecified)	1
Warsaw	1

6.2.3 Onward travel outside of Europe

Table 9: Number of trips made by survey respondents to onward destinations outside Europe – business travel

Destinations	Number of trips made
Los Angeles	21
Hong Kong	18
Dubai	14
USA (airport unspecified)	13
Singapore	9
New York	8
Cape Town	7
South Africa (airport unspecified)	7
Bermuda	6
Japan (airport unspecified)	4
Mauritius	4
Brazil (airport unspecified)	3
Boston	2
Chile (airport unspecified)	2
China (airport unspecified)	2
Israel (airport unspecified)	2
Mumbai	2
Nairobi	2
Toronto	2
Washington	2
Australia (airport unspecified)	1
Bahamas	1

|	
Beijing	1
Brunei	1
Curacao	1
Florida	1
Houston	1
Jamaica	1
Johannesburg	1
Malaysia	1
Mexico (airport unspecified)	1
Miami	1
Panama	1
San Francisco	1
Saudi Arabia (airport unspecified)	1
Shanghai	1
South Korea (airport unspecified)	1
Tokyo	1

7   Importance of airports to leisure and business travellers

Survey respondents were asked for their views on the importance of the airports to which they travelled. Respondents were asked to rank how important each airport was to them, both for leisure and/or business travel, where a score of 1 was very important and 5 was not important.

7.1   Importance for leisure travellers

The responses presented below should be considered in terms of the number of responses received relevant to each airport destination. These are shown in **Figure 7** below:

Figure 7: Number of responses received for each airport and rankings given for importance of those airports
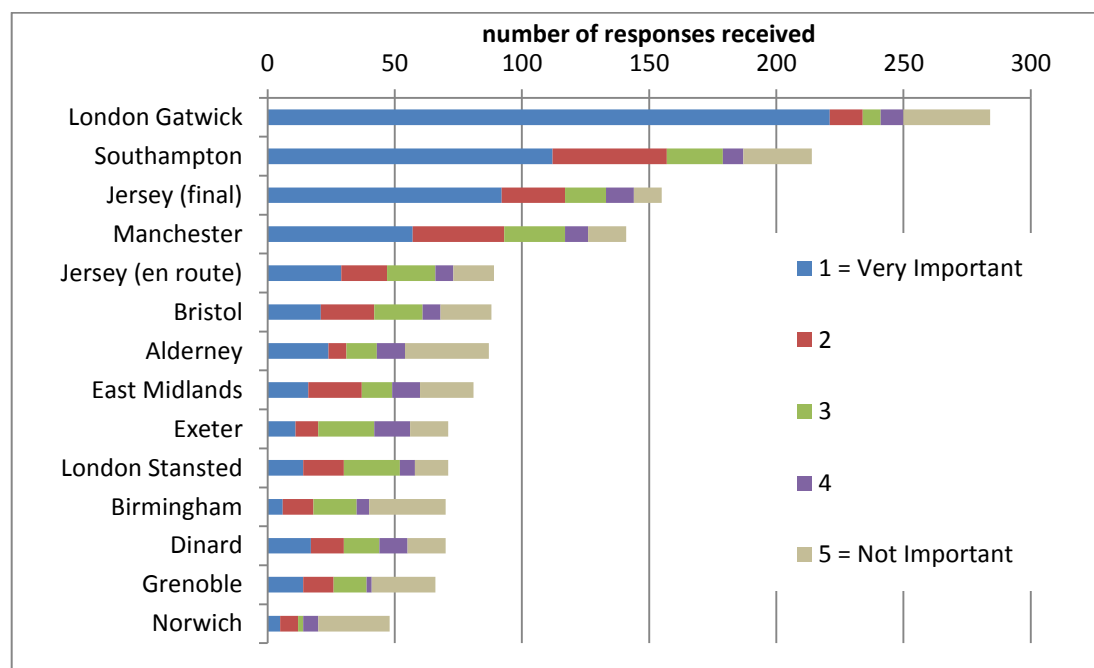

Table 10 and Figure 8 show which airports were considered most important by leisure travellers in terms of the percentage ranking score (1 to 5) recorded for each airport. It should be borne in mind when viewing these results that the number of responses received for some airports was much lower than others.

Table 10: Importance of airport destinations for leisure travellers – % ranking of responses received by destination airport

	Very Important				Not Important
	Rank (where 1= Very important, 5= Not important)				
	1	2	3	4	5
London Gatwick	77.8%	4.6%	2.5%	3.2%	12.0%
Jersey (final)	59.4%	16.1%	10.3%	7.1%	7.1%
Southampton	52.3%	21.0%	10.3%	3.7%	12.6%
Manchester	40.4%	25.5%	17.0%	6.4%	10.6%
Jersey (en route)	32.6%	20.2%	21.3%	7.9%	18.0%
Alderney	27.6%	8.0%	13.8%	12.6%	37.9%
Dinard	24.3%	18.6%	20.0%	15.7%	21.4%
Bristol	23.9%	23.9%	21.6%	8.0%	22.7%
Grenoble	21.2%	18.2%	19.7%	3.0%	37.9%
East Midlands	19.8%	25.9%	14.8%	13.6%	25.9%
London Stansted	19.7%	22.5%	31.0%	8.5%	18.3%
Exeter	15.5%	12.7%	31.0%	19.7%	21.1%
Norwich	10.4%	14.6%	4.2%	12.5%	58.3%
Birmingham	8.6%	17.1%	24.3%	7.1%	42.9%

Figure 8: Importance of airport destinations for leisure travellers
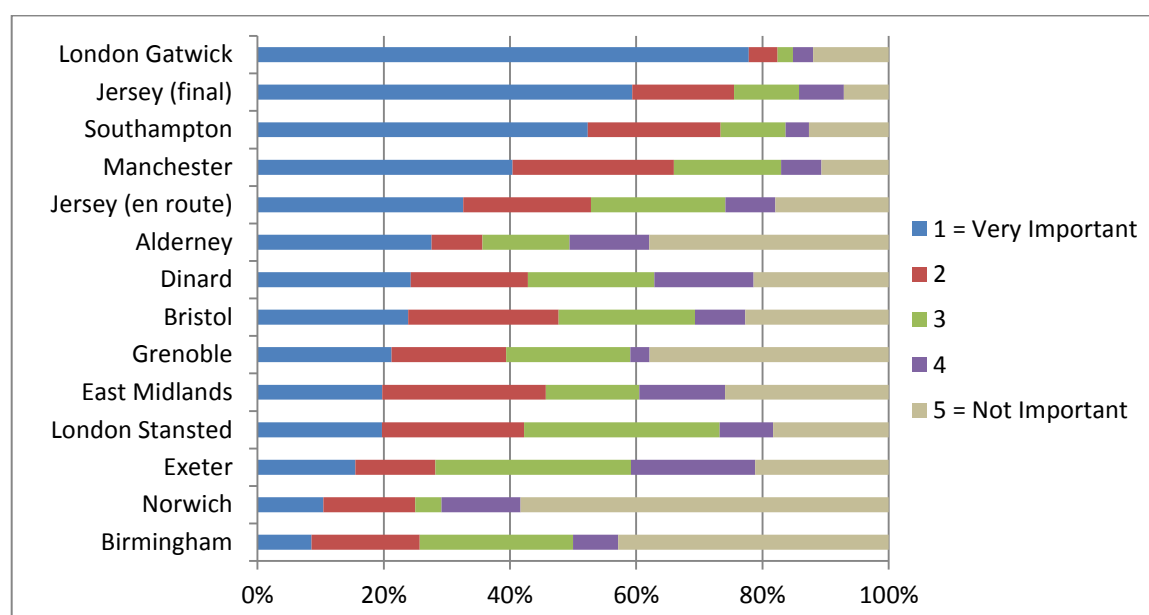

Commentary:

London Gatwick, Jersey (as a final destination) and Southampton airports all rank highly (scoring 50% or more in the "very important" category) in importance to leisure travellers. Of note is the importance given to Jersey as an "en route" destination, ranking highly in the "very important" category. Manchester airport is also ranked fairly highly by leisure travellers.

Of those scoring relatively highly, Dinard, Bristol and Grenoble are worthy of mention, albeit that passenger numbers to these destinations are much lower than for Gatwick and Southampton. Birmingham airport ranked lowest in terms of the "very important" category, though Norwich airport recorded the highest "not important" score of 58.3%.

7.2 Importance to business travellers

The responses presented below should be considered in terms of the number of responses received relevant to each airport destination. These are shown in **Figure 9** and **Table 11** below:

Figure 9: Number of responses received for each airport and rankings given for importance of those airports – business travel
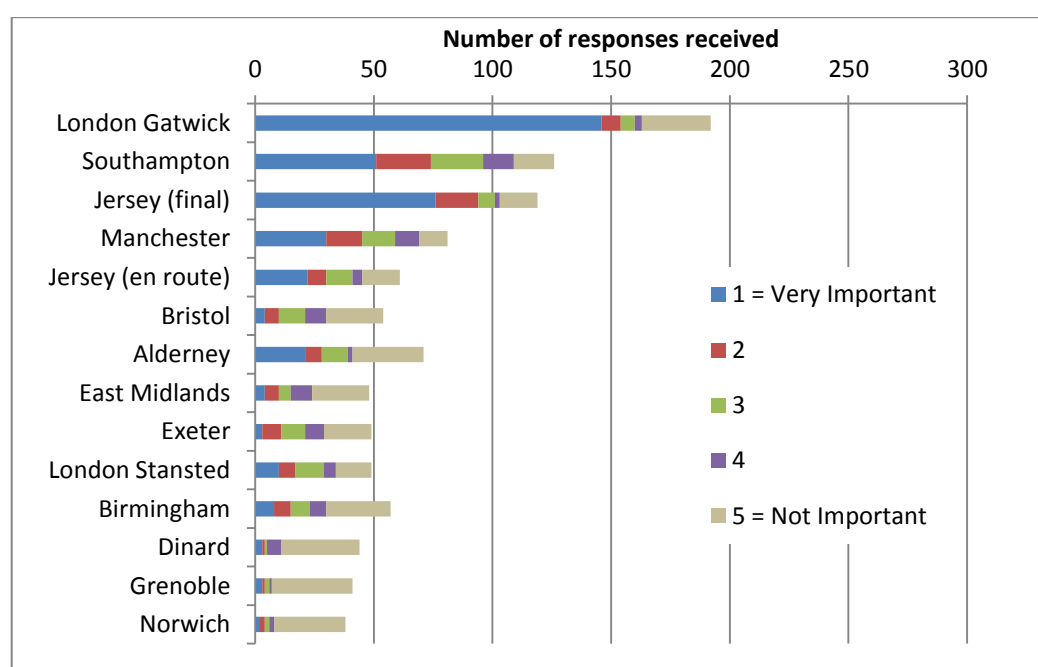

Table 11: Importance of airport destinations for business travellers – % ranking of responses received by destination airport

	Very Important				Not Important
	Rank (where 1= Very important, 5= Not important)				
	1	2	3	4	5
London Gatwick	76.0%	4.2%	3.1%	1.6%	15.1%
Jersey (final)	63.9%	15.1%	5.9%	1.7%	13.4%
Southampton	40.5%	18.3%	17.5%	10.3%	13.5%
Manchester	37.0%	18.5%	17.3%	12.3%	14.8%
(Jersey (en route)	36.1%	13.1%	18.0%	6.6%	26.2%
Alderney	29.6%	9.9%	15.5%	2.8%	42.3%
London Stansted	20.4%	14.3%	24.5%	10.2%	30.6%
Birmingham	14.0%	12.3%	14.0%	12.3%	47.4%
East Midlands	8.3%	12.5%	10.4%	18.8%	50.0%
Bristol	7.4%	11.1%	20.4%	16.7%	44.4%
Grenoble	7.3%	2.4%	4.9%	2.4%	82.9%
Dinard	6.8%	2.3%	2.3%	13.6%	75.0%
Exeter	6.1%	16.3%	20.4%	16.3%	40.8%
Norwich	5.3%	5.3%	5.3%	5.3%	78.9%

Figure 9: Importance of airport destinations for business travellers
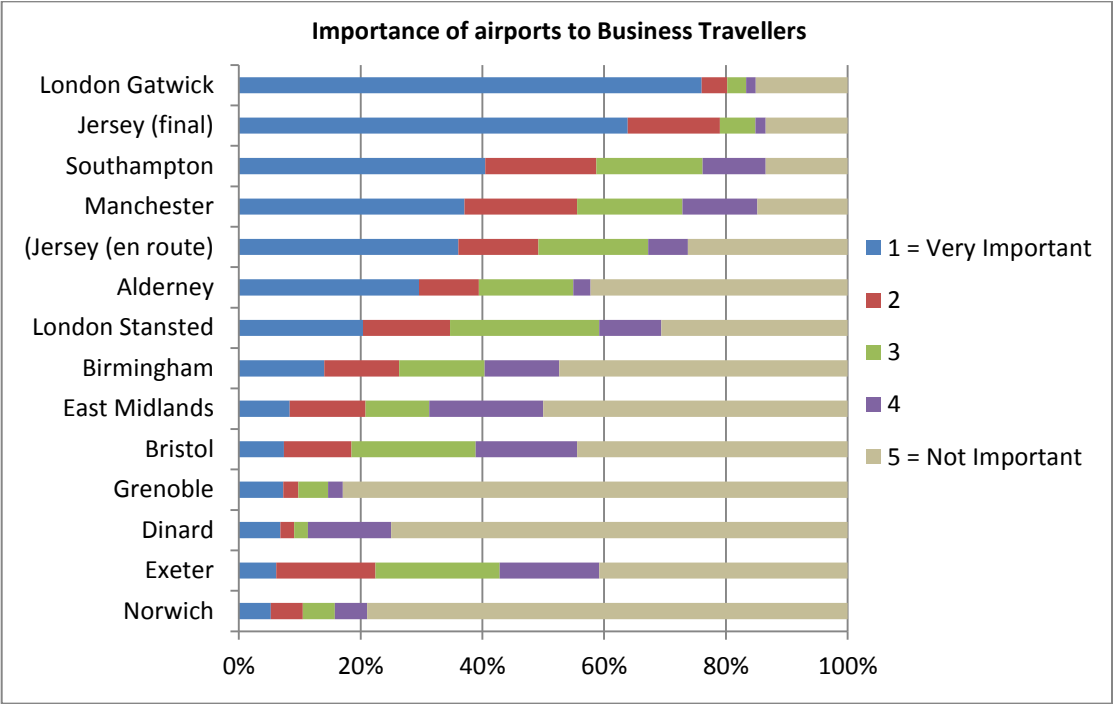
Commentary:

London Gatwick, Jersey (as a final destination), Southampton, Manchester and Jersey (en route) airports all rank highly in importance to business travellers. These findings follow a very similar pattern to the findings for leisure travel. Airports such as East Midlands Airport, Bristol, Grenoble, Dinard, Exeter and Norwich are not seen as important destinations for business travellers.

8 Purpose of trips to UK airports

Survey respondents were asked the purpose of their visit to UK airports. The question was asked in order to establish whether the airports were being used primarily as a final destination, or whether there was an element of travel to other destinations – either in the UK or to international destinations.

8.1 Leisure travel

Table 12: Number who used UK airports at least once by purpose of trip – leisure travellers

Leisure travellers	Total number who used destination at least once	As a Final destination	En Route to another UK airport	En Route to an airport in Europe or further afield	Didn't specify
Birmingham	31	15	3	1	12
Bristol	52	27	0	2	23
East Midlands	43	22	0	0	21
Exeter	38	16	1	0	21
London Gatwick	286	144	29	59	54
London Stansted	26	16	0	1	9
Manchester	103	58	3	6	36
Norwich	5	2	1	0	2
Southampton	197	100	21	12	64

Figure 10: Number who used UK airports at least once by purpose of trip – leisure travellers
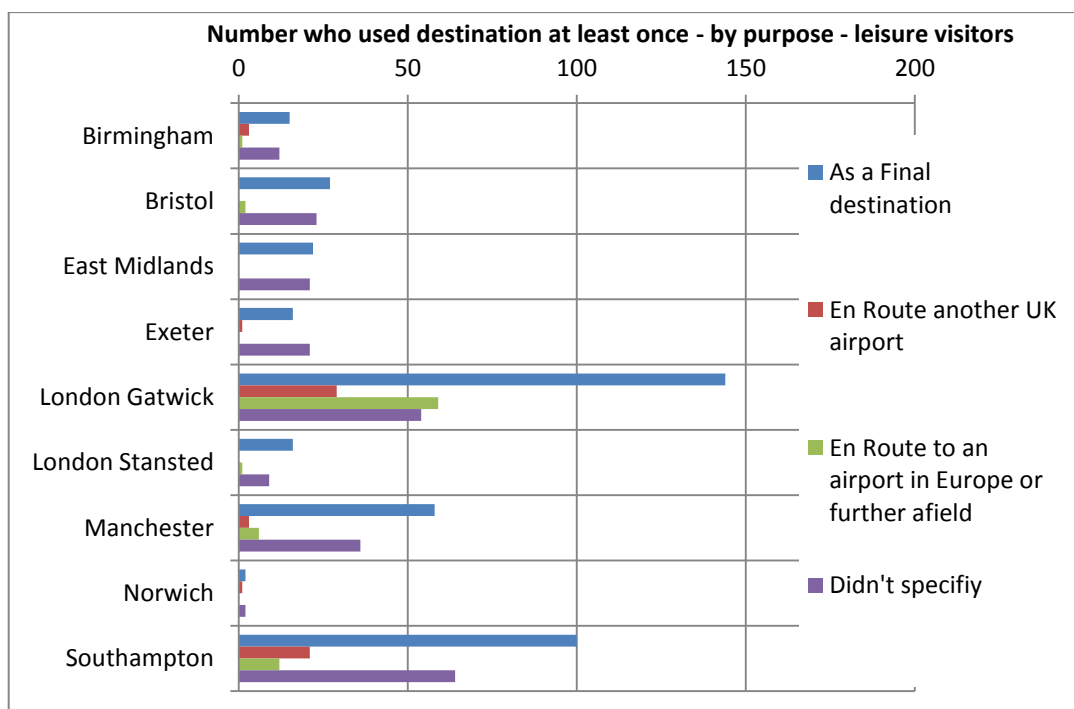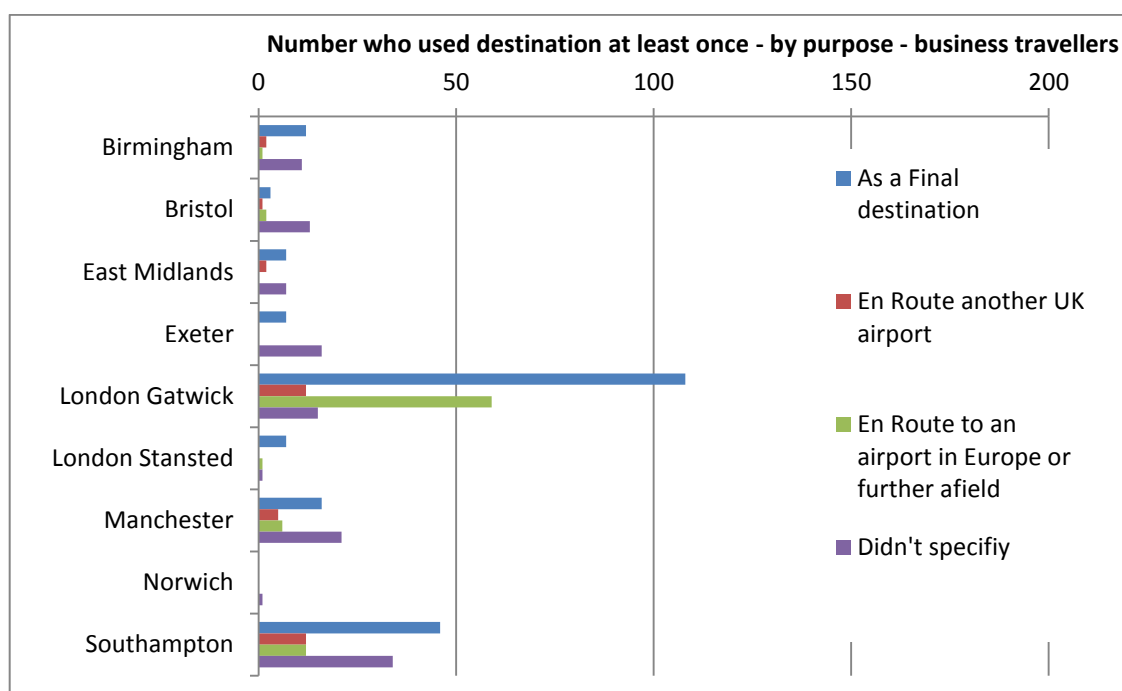
Commentary:

Most people travelling to the UK for leisure purposes use their destination airport as a final destination. London Gatwick and Southampton airports, and to a lesser extent Manchester airport are the airport destinations that are used as a stopping off point for onward travel. For London Gatwick airport, more people are using the airport en route to a destination in Europe or further afield, than en route to a destination in the UK. For Southampton Airport, the opposite is true, with a greater proprtion of travellers using the airport en-route to destinations within the UK.

8.2 Business Travel

Table 13: Number who used UK airports at least once by purpose of trip – business travellers

Business travellers	Total number who used destination at least once	As a Final destination	En Route another UK airport	En Route to an airport in Europe or further afield	Didn't specify
Birmingham	26	12	2	1	11
Bristol	19	3	1	2	13
East Midlands	16	7	2	0	7
Exeter	23	7	0	0	16
London Gatwick	194	108	12	59	15
London Stansted	9	7	0	1	1
Manchester	48	16	5	6	21
Norwich	1	0	0	0	1
Southampton	104	46	12	12	34

Figure 11: Number who used UK airports at least once by purpose of trip – business travellers

Commentary:

Similar to the trend for leisure travellers, most business travellers use the UK airports as a final destination. However, in the case of London Gatwick Airport, a significant proportion uses the airport en-route to another international destination.

9 Importance of key factors on choice of UK airport

Respondents were asked to rate the importance of various factors on their choice of UK airport.

9.1 Leisure travel

Table 14: Importance of key factors on choice of UK airports for leisure travellers – percentage of responses

Highest score shown in red
Lowest score shown in blue

	Price	Convenient flight times	Choice of flight times	Convenience of interlining to other flights	Proximity of airport to transport links (e.g. train) within the UK	Proximity to leisure destination
Critical	24.2	29.7	17.9	25.9	18.1	8.8
Very Important	42.0	49.1	50.4	24.6	39.8	23.7
Important	26.4	17.2	25.0	10.1	33.2	35.8
Slightly Important	6.5	3.9	6.3	5.3	7.1	21.4
Unimportant	0.9	0.0	0.4	34.2	1.8	10.2
Total	100.0	100.0	100.0	100.0	100.0	100.0

Figure 12: Importance of key factors on choice of UK airports for leisure travellers – percentage of responses
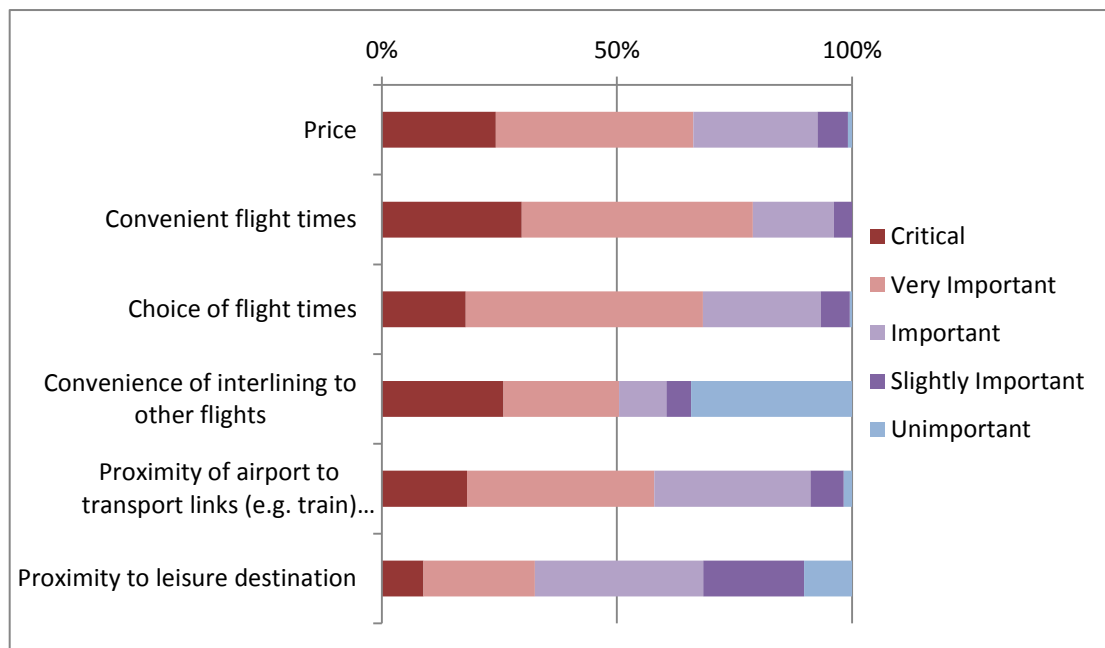
Commentary:

Price, convenient flight times and choice of flights were considered either very important or critical to most respondents. These three factors recorded the highest percentage of responses in the "very important" category and the lowest in the "unimportant". Combining the percentage scores in these two categories shows the following:

Price:	66.2% of responses
Convenient Flight times:	78.9% of responses
Choice of flight times:	68.3% of responses

Convenience of interlining to other flights scored highest in the "unimportant" category. However, this factor also scored quite highly in the critical (25.9%) and very important (24.6%) categories suggesting a mix of views on this factor. This may be, in part due to lower numbers of travellers proceeding on to other destinations.

The proximity of the airport to a traveller's leisure destination was not seen as critical factor – 8.8% of respondents indicating that this factor was critical.
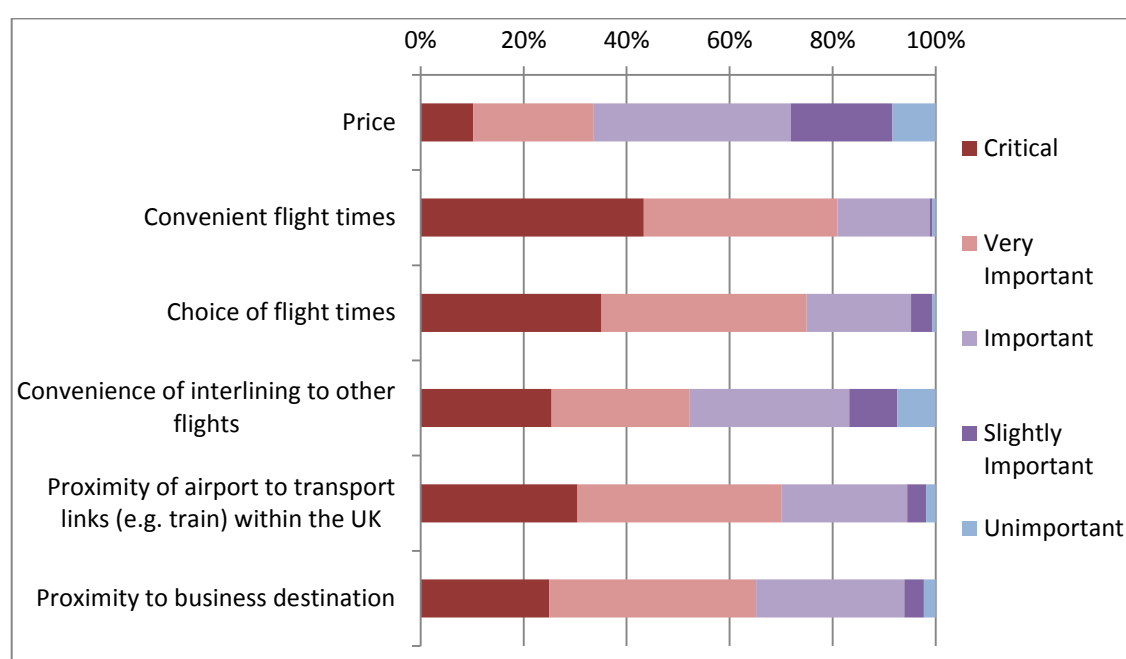
9.2 Business travel

Table 15: Importance of key factors on choice of UK airports for business travellers – percentage of responses

Highest score shown in red

Lowest score shown in blue

	Price	Convenient flight times	Choice of flight times	Convenience of interlining to other flights	Proximity of airport to transport links (e.g. train) within the UK	Proximity to business destination
Critical	10.2	43.4	35.1	25.5	30.5	25.0
Very Important	23.4	37.6	39.9	26.7	39.6	40.2
Important	38.3	17.9	20.2	31.1	24.4	28.8
Slightly Important	19.8	0.6	4.2	9.3	3.7	3.8
Unimportant	8.4	0.6	0.6	7.5	1.8	2.3
Total	100.0	100.0	100.0	100.0	100.0	100.0

Figure 13: Importance of key factors on choice of UK airports for business travellers – percentage of responses

Commentary:

The clear message as far as business travellers are concerned is that price is not a critical factor in terms of choice of airport, whereas convenient flight times and choice of flight are.

10 Impact of increasing fares on airport of choice

Survey respondents were asked to consider the impact of increasing fares on their continued use of the UK airport which they used the most. Respondents were asked to consider a range of airfare increases (from 5% to 20%) and then to indicate whether this increase would result in them not changing their travel plans, being less likely to use the airport, or whether they wouldn't use the airport at all.

10.1 Leisure travel

Table 16: Impact of increasing airfares on airport used the most – percentage of respondents – leisure travellers

Highest score shown in red

Lowest score shown in blue

Leisure travel			
	No change	Less Likely to use	Wouldn't use
Airfares increase by 5%	82.6	16.5	0.9
Airfares increase by 10%	51.8	43.7	4.5
Airfares increase by 15%	21.8	60.9	17.3
Airfares increase by 20%	10.0	46.8	43.2

Figure 14: Impact of increasing airfares on continued use of airport used the most – percentage of respondents – leisure travel
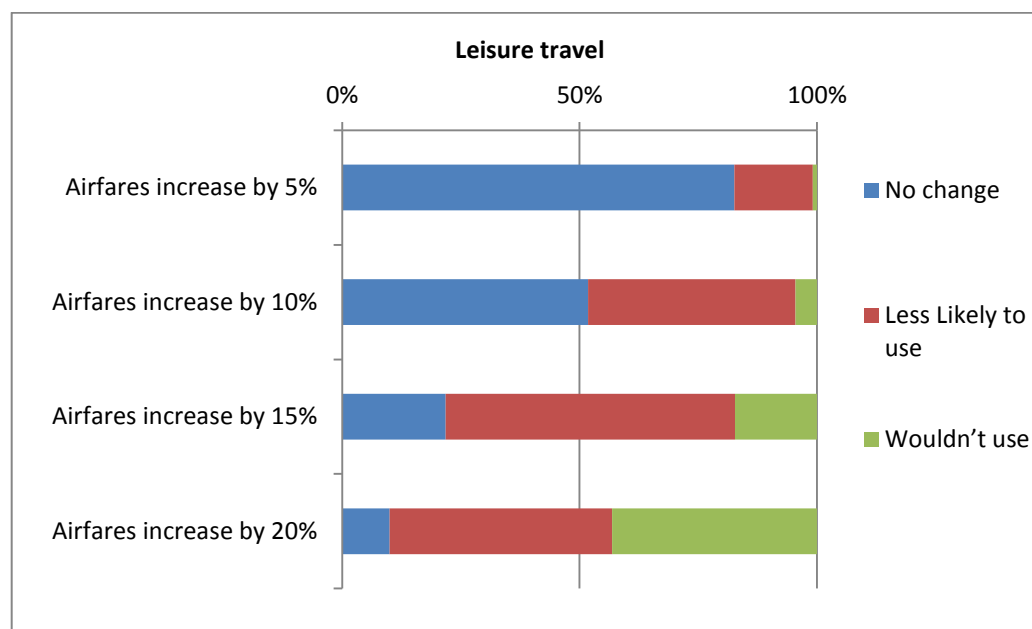
Commentary:

The results show that fare increases up to 5% would not have a significant impact on respondents' use of their UK airport of choice, with 82.6% indicating they would not change their use of the airport and only 16.5% saying they were less likely to use it. 0.9% said they wouldn't use the airport under this scenario.

Not surprisingly, as the cost of airfares rise, then the impact on the use of the airport increases. A scenario of airfares increasing above more than 10% would have a significant impact on a decision to continue using the airport, with 61% saying they would be less likely to use the airport with a 15% increase in fares. 43% would not use the airport at all with a 20% rise in fares.
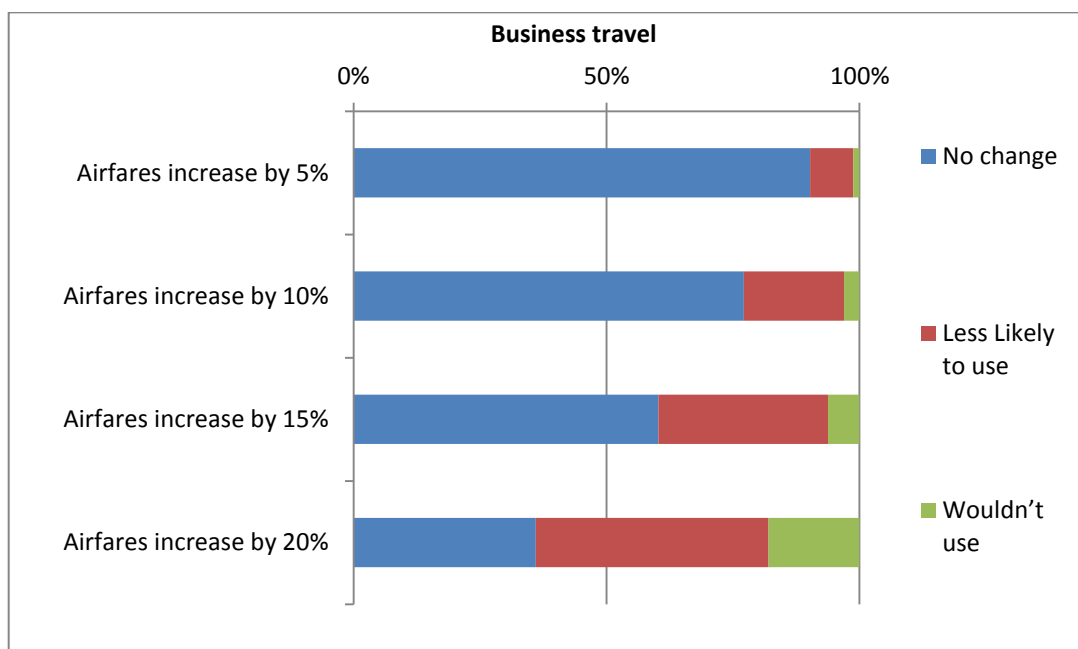
10.2 Business travel

Table 17: Impact of increasing airfares on airport used the most – percentage of respondents – business travellers

Highest score shown in red
Lowest score shown in blue

Business travel			
	No change	Less Likely to use	Wouldn't use
Airfares increase by 5%	90.2	8.5	1.2
Airfares increase by 10%	77.2	19.8	3.1
Airfares increase by 15%	60.2	33.5	6.2
Airfares increase by 20%	36.0	46.0	18.0

Figure 15: Impact of increasing airfares on continued use of airport used the most – percentage of respondents – business travel


Commentary:

The impact of price increases on business travellers was much less likely to affect their choice of UK airport: Even with a 15% increase in airfares, 60% of respondents said this would not change their

choice of airport. Even with a 20% increase, only 18% said they wouldn't use the airport, with 36% saying they wouldn't change and 46% indicating they would be less likely to use the airport.

A comparison of the difference between leisure and business travel is shown in **Figure 16** below:

Figure 16: Impact of increasing airfares on continued use of airport used the most – percentage of respondents – leisure and business travel compared.
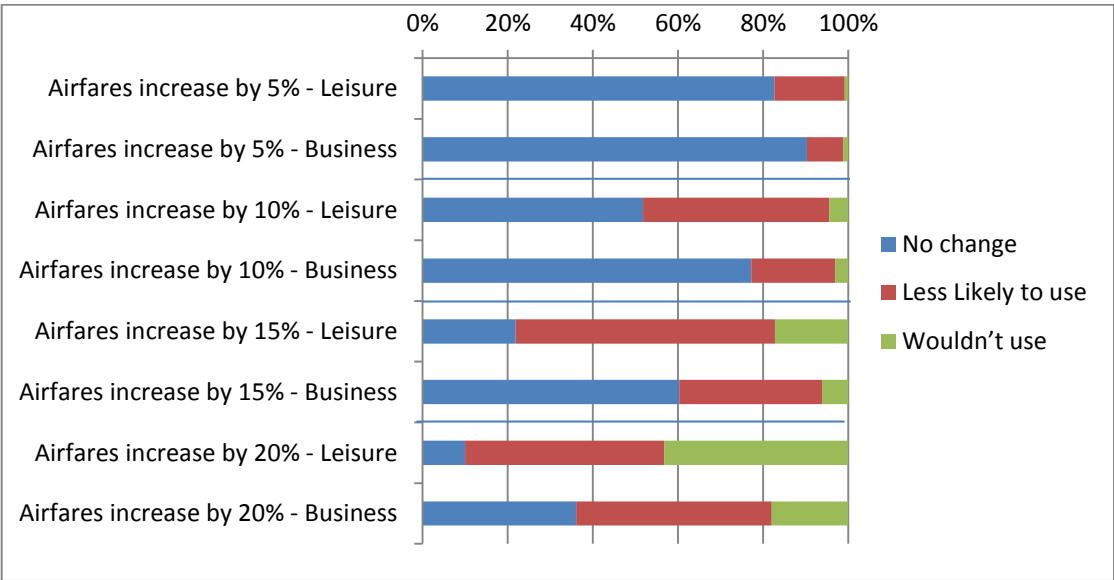
11 Choice of alternative airports and further comments

11.1 Alternative choice of airport

Survey respondents were asked what would be their alternative airport if their airport of choice was no longer available. The results are shown in **Tables 18** below.

Table 18: Alternative choice of airport

Leisure Travel		Business Travel	
Destination	Total	Destination	Total
Southampton	88	Southampton	65
London Stansted	33	London City	38
London City	21	London Stansted	21
London Gatwick	19	London Heathrow	12
Manchester	18	London Gatwick	10
London Heathrow	15	Jersey	8
East Midlands	12	Birmingham	4
Birmingham	11	Manchester	4
Bristol	6	Amsterdam	3
Exeter	6	East Midlands	3
Jersey	6	Exeter	1
Amsterdam	5	Leeds	1
London Luton	3	Newcastle	1
Paris	3	Paris	1
Cardiff	2		
Bournemouth	1		
Doncaster	1		
Leeds	1		
Liverpool	1		
Plymouth (if re-instated)	1		

Commentary: Southampton airport is a clear alternative choice of airport for both leisure travellers and business travellers. For business travellers, London City is a strong alternative.

Further qualitative responses were also received as follows:

- 12 respondents said that if London City Airport were an option this would be the preferred alternative
- 11 respondents said that Heathrow was the desired alternative
- 10 respondents said London Gatwick is essential
- 8 respondents would consider taking a ferry
- 4 respondents would consider going via Jersey
- 3 respondents said that their choice was dependant on price

Some of the specific comments made are reproduced below:

- Stansted is not a viable alternative to London Gatwick.
- Desperate to have direct links to Paris and Nice for both business and pleasure early and late flights.
- [would] move business from Guernsey.
- Private Charter.
- More Skiing destinations for leisure trips.
- Subsidising the air fares is far more important to the financial health of Guernsey than the excessive bus subsidy.
- I am thinking of leaving the island because the very expensive flights and lack of availability in to London.
- Aurigny as a single carrier is an absolute disaster for Guernsey commerce.
- Guernsey's current transport policy and the continued depletion of links is killing business in Guernsey.
- Lack of competition in Guernsey due to runway length makes Jersey a more attractive base. Also ability to interline on BA.

11.2 Further airports or cities to which Guernsey should have direct air links

Table 19: Further airports or cities to which Guernsey should have direct air links – leisure and business travel and UK / European destinations

Leisure Travel		Business Travel	
UK	Total responses	UK	Total responses
London Heathrow	40	London City	50
London City	35	London Heathrow	27
Edinburgh	16	Edinburgh	13
Glasgow	8	Glasgow	7
Cardiff	5	Leeds	4
Scotland	5	Belfast	3
Leeds	4	Newcastle	3
London Luton	4	Scotland	3
Belfast	3	Isle of Man	2
Newcastle	3	Cambridge	1
Cornwall	2	Cork	1
Liverpool	2	Cornwall	1
Newquay	2	Liverpool	1
Devon	1	Newquay	1
Isle of Man	1	Plymouth	1
London Stansted	1	Southend	1
Norwich	1		

Leisure Travel		Business Travel	
Europe	Total responses	Europe	Total responses
Paris	42	Paris	27
Amsterdam	21	Amsterdam	15
More European Destinations	9	Dublin	7
Dublin	7	More European Destinations	6
Nice	5	Geneva	4
Barcelona	3	Frankfurt	3
Geneva	3	Zurich	3
Rennes	3	Brussels	2
Faro	2	Madrid	2
Frankfurt	2	Nice	2
Spain	2	Berlin	1
Zurich	2	Ireland	1
Alicante	1	Milan	1
Brussels	1	Rennes	1
France	1		
Germany	1		
Ireland	1		
Italy	1		
Lisbon	1		
Madeira	1		
Madrid	1		
Malaga	1		
Milan	1		
Munich	1		
Rome	1		

Supporting comments were received which justified these choices. For the top destinations listed in **Table 19** above, a summary of these justifications is given below:

- **Heathrow Airport**
- Assists in travelling further afield e.g. USA.
- Has more choice for Long-haul flights
- Greater ease of travel

- **Paris & Amsterdam**
- Good connectivity to the rest of the world
- Could attract inflows of tourists. It would improve leisure opportunities for residents.
- This would make it far easier for European business customers to reach us and add more choices for leisure travellers

- **London Luton**
- There is a convenient coach service to Heathrow Gatwick and Stansted. Also rail travel to other destinations in the UK

- **General Comments**
- More holiday destinations needed in the summer months, as travelling via London is very expensive.
- It would be good to have links to hubs in Europe as an alternative to flying to the UK and also for business reasons, also with other flights to business hubs or better leisure destinations in the UK will be good especially Scotland or Wales which doesn't have direct links to.
- We need links to other hub airports - flights to Dublin for example open up the US market easily, flights to Paris, Amsterdam and Frankfurt enable you to change planes quite easily.
- There is a lot of Irish living on Guernsey and their families would visit the Island a lot more if there were direct flights, also Guernsey residents with family in Ireland would use the service more frequently.   You would also be opening up another tourist market.
- There are many opportunities to grow our inbound business from Europe, but without more regular flights to the major cities it would be mere impossible to build the relationships we need to develop the business.
- Guernsey needs more connectivity to France to benefit leisure and business travel.
- For business European airports provide easier accessibility and have the potential to encourage more visitors to Guernsey.

11.3 Further comments

Survey respondents were given the opportunity to provide any further comments they had on the air routes served by Guernsey airport. A selection of these is reproduced below:

- Capacity on the Gatwick route is insufficient and causing prices to increase rather dramatically. More competition is needed.
- Pricing for islanders could be considered as flat fares.
- Budget Airline would boost travel to/from the Island, increase tourism and competition
- Aurigny should code share with other international airlines, to provide better prices and transfer times.
- Aurigny should charge a standard set fare for every seat regardless of when it is booked. That way you are not penalised if you have to get off the island at short notice - i.e. to attend a funeral or whatever. They must know what price that could be.
- Gatwick route is critical and should be kept at all costs.
- The runway should be extended to accommodate larger aircraft
- Airlines should give better deals especially if booking very far in advance.
- Last minute booking costs should not be so high if flights are not full
- With a reduced number of flights between Guernsey and Jersey it's harder to book with short notice or change the flight.
- Greater promotion of Aurigny or rebranding is needed to promote Guernsey

- Emphasis should be given to airports which serve business and hospital visits
- London City option direct from Guernsey for both leisure and business is needed. Gatwick prices are more expensive now - I'm more inclined to use Southampton if possible
- Guernsey airport website could benefit from a makeover.
- Greater availability of standby fares should be made available to ensure more seats on flights are taken
- Guernsey's runway length is too short to be used economically by the majority of jets owned by the majority of airlines. There will simply be no significant tourist industry in Guernsey if Guernsey continues to prevent airlines flying here from most destinations with their standard small jets.   Commerce & Employment, together with the Tourism industry, should force the States to revisit this as a matter of urgency. The previous decision by the States was so obviously short-sighted and wrong.
- I am CEO of [redacted] and we ALSO bring tourists into Guernsey. The limited flights, lack of availability and non-competitive costs will KILL inbound tourism. It is already stifling commerce. This week we could not bring a video team to the island because there are NO SEATS available. Horrendous.   Guernsey needs other carriers to fly here otherwise the economy is going to suffer even more than it already is...
- It's a disgrace I can buy an Aurigny flight cheaper on a flight comparison website than it is to book on the Aurigny website.
- The airport should consider longer hours e.g. open until 21.30 so that the spread of planes and the convenience of timings and slots could be improved - anything that improved our air links.