



Island Global Research

A BWCI Group Company

SATISFACTION WITH OFF-ISLAND TRAVEL

FINDINGS FROM A SURVEY OF
RESIDENTS IN JERSEY, GUERNSEY
AND THE ISLE OF MAN



March
2026

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This report presents findings from a survey about off-island travel links, completed by residents in Jersey, the Bailiwick of Guernsey and the Isle of Man in January 2026.

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About Island Global Research

Island Global Research is a full-service market research company with experience in both quantitative and qualitative research methods. We regularly conduct market research for clients in the Crown Dependencies.

From time to time, we also 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 own surveys, and it is an opportunity for us to give back to the island communities who participate in our market research.

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

Or contact us using 01481 716227:

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INTRODUCTION

Island Global Research conducted a survey in Jersey, the Bailiwick of Guernsey, and the Isle of Man in January 2026 about off-island travel links.

The survey asked residents about:

- Satisfaction with cost, reliability and choice of destinations from their island.
- Confidence that travel links will meet the needs of people in the future.

Approach

The questions were embedded into a wider survey about holiday preferences. The survey was promoted to a wide audience using the following channels:

- Island Global Research contacted their market research panel and invited them to participate in the survey.
- Island Global Research promoted the survey using social media (Facebook and Instagram).

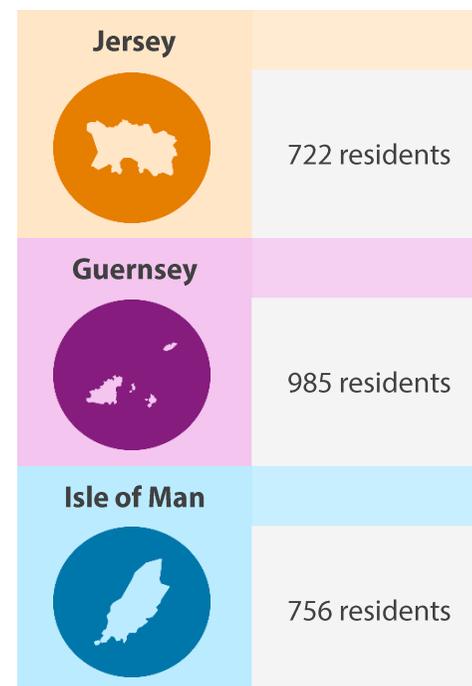
The survey was open to all residents aged 16 and over. After cleaning, the final dataset contained 2,463 eligible responses.

The profile of people who completed the survey was compared to the latest available data on the population of Jersey, Guernsey and the Isle of Man. The appendix includes information about the profile of respondents.

Survey responses were weighted in proportion to the age and gender profile of the adult population in each island, which helps to compensate for patterns of non-response from different sub-groups of the population. Fewer under 30s completed the survey and weights for these age groups have been capped at 3.0. The results are reasonably representative by age and gender of the adult population aged 30+.

For some questions it was possible to compare responses to a survey conducted by Island Global Research in 2019. The report from the 2019 survey can be accessed here: <http://islandglobalresearch.com/wp-content/uploads/2026/03/IGR-Report-Satisfaction-with-air-and-sea-travel-2019-Survey.pdf>.

The survey was completed by 2,463 residents across the three islands.



THE MAJORITY



are **not satisfied** with the cost, reliability or choice of destinations by air or sea



LEAST SATISFIED



with **cost** and **reliability** of travel by **sea** (10%)



NOTABLE DROP



in satisfaction with **all aspects** of off-island travel links **since 2019**



ALTHOUGH THERE REMAINS



more satisfaction with air than sea links



THE MAJORITY



do **not have a lot of confidence** in future travel links



AROUND 1 IN 3



are **confident** that future travel links will **meet the needs of residents** travelling for personal or business reasons.

But only 1 in 5 are confident future travel links will meet the needs of tourists, businesses that import/export goods, and that the security of vital links will be maintained.



THE MAJORITY



are **not satisfied** with the cost, reliability or choice of destinations by air or sea



LEAST SATISFIED



with **cost of air travel** (11%)

Satisfaction with reliability and choice of destinations by air is lower than in 2019



NOTABLE IMPROVEMENT



in **satisfaction** with travel by **sea since 2019** (up to 20 percentage points higher)



NOW SLIGHTLY MORE



satisfaction with sea than air links



THE MAJORITY



do **not have a lot of confidence** in future travel links



AROUND 3 OUT OF 10



are **confident that future travel links will meet the needs** of residents, visitors, businesses that import/export goods, and that the security of vital links will be maintained



THE MAJORITY



are **not satisfied** with the cost, reliability or choice of destinations by air or sea



LESS THAN 20% ARE SATISFIED



with the **reliability** and **choice** of destinations by **air**, and with the **cost of travel** by both **air** and **sea**



NOTABLE DROP



in satisfaction with **all aspects** of off-island travel links **since 2019**



THERE ARE SIMILAR



levels of dissatisfaction with **air and sea links**



THE MAJORITY



do **not have a lot of confidence** in future travel links



AROUND 1 in 5



are **confident that future travel links will meet the needs** of residents, tourists, businesses importing / exporting and that the security of vital links will be maintained



KEY FINDINGS

SATISFACTION

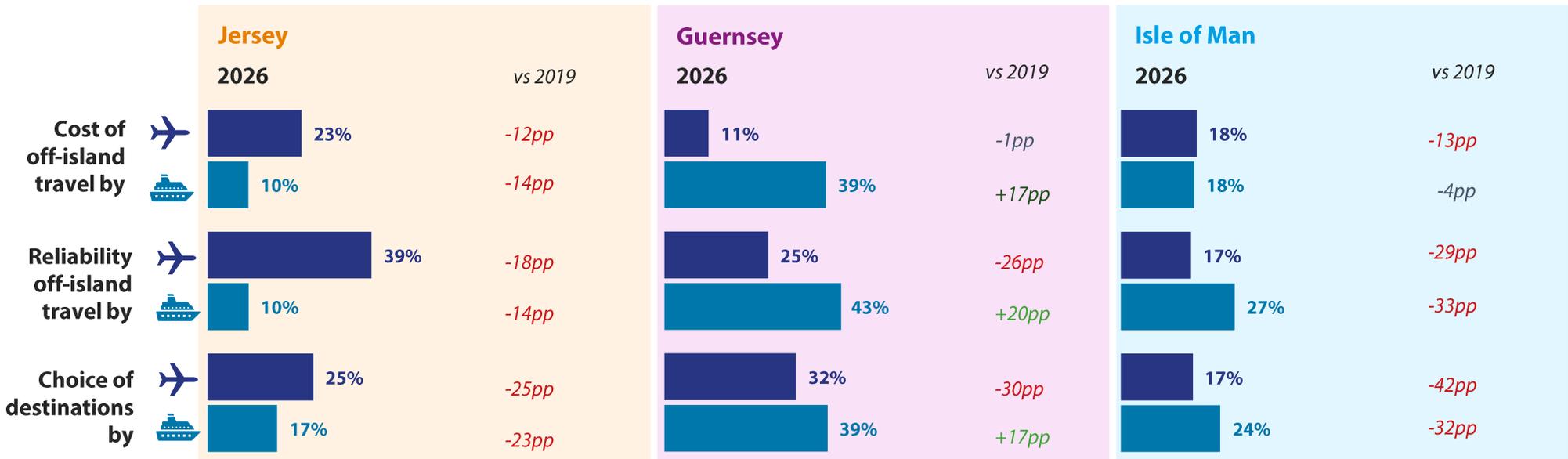


Residents were asked how satisfied they are with the cost and reliability of travelling off-island by air and sea, and with the choice of destinations.

Across these aspects, less than half said they were satisfied or very satisfied. The highest levels of satisfaction were with sea travel links in Guernsey and with the reliability of air travel in Jersey.

- In Jersey, the lowest levels of satisfaction were with cost and reliability of travel by sea. Only 10% were satisfied with these aspects. There has been a notable drop in satisfaction with all areas since 2019.
- In Guernsey, the lowest levels of satisfaction were with cost of air travel (11%). There has been a drop in satisfaction with reliability and choice of destinations by air compared to 2019. While satisfaction with travel by sea has improved in all areas since 2019.
- In the Isle of Man, the lowest levels of satisfaction were with reliability and choice of destination by air (17%), though satisfaction with the cost of both modes of transport was similarly low (18%). There has been a notable drop in satisfaction with all areas, except cost of sea travel since 2019.

% satisfied or very satisfied with ...



KEY FINDINGS

CONFIDENCE

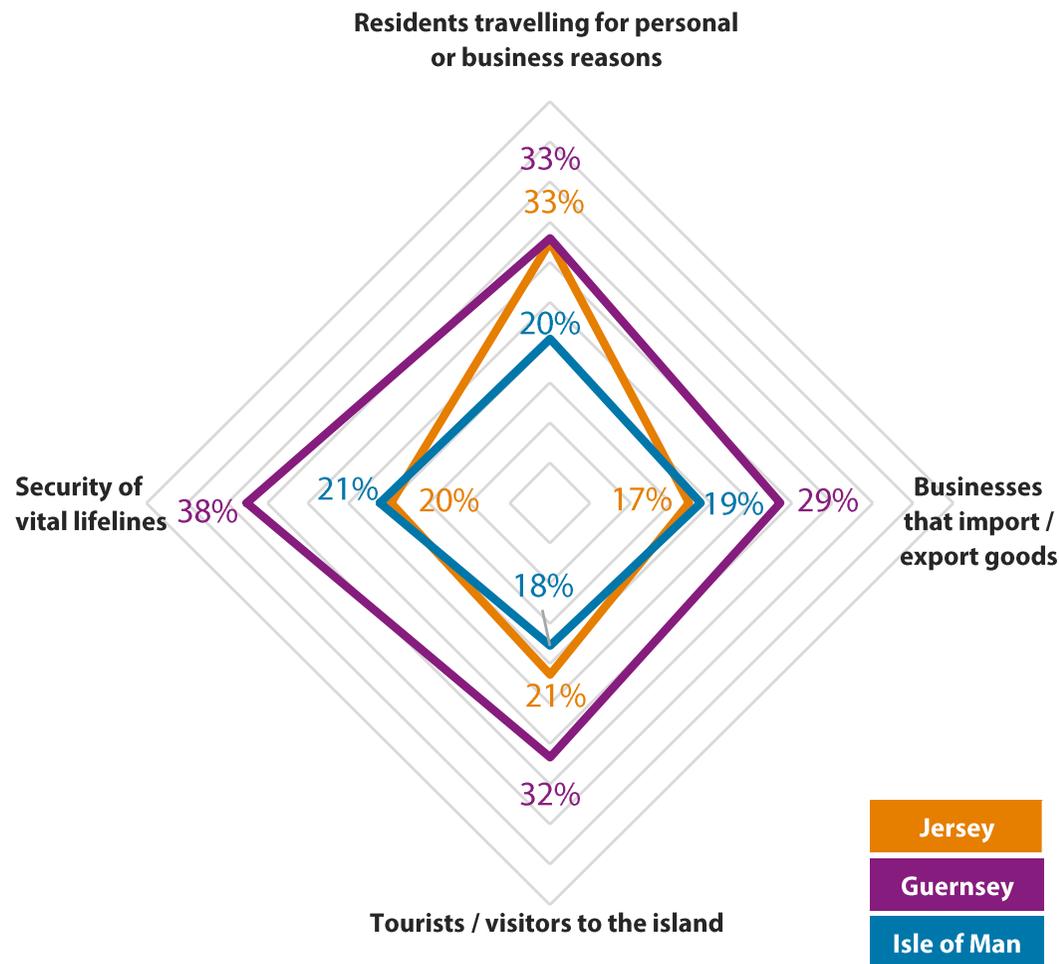
Using a scale from 0 (not at all confident) to 10 (extremely confident), residents were asked how confident they are that off-island travel links will meet the needs of:

- Residents travelling for personal or business reasons
- Businesses that import / export goods
- Tourists / visitors to the island
- Security of vital lifelines.

Across all three islands, less than half had a high level of confidence (i.e. 7 or above) that off-island travel links will meet future needs.

- People were more positive in Guernsey than in Jersey and the Isle of Man, though in all locations the majority of people scored their confidence as 6 or below for each dimension.
- A third of people in Jersey and in Guernsey had a high level of confidence that off-island travel links will meet the needs of residents travelling for personal or business reasons over the next 5 years. While in the Isle of Man only 20% have a high level of confidence in this dimension.
- In Guernsey, 38% of people had a high level of confidence in the security of vital lifelines over the next 5 years. Confidence in other economic dimensions was similar: 29% have high confidence that the needs of businesses importing/exporting goods would be met, and 32% were confident it would need the needs of tourists / visitors.
- In Jersey and the Isle of Man, around 1 in 5 have high confidence that off-island travel links will fulfil the security of vital lifelines drops, meet the needs of importing/exporting businesses and the needs of tourists/visitors.

% who have high confidence that in the next 5 years off-island travel links will meet the needs for ...



SATISFACTION WITH AIR AND SEA LINKS



SATISFACTION: COST OF TRAVELLING OFF-ISLAND

Respondents were asked “Personally, how satisfied are you with the cost of travel off-island travel by air / by sea?”

In Jersey and the Isle of Man the majority of people are dissatisfied with the cost of travel by air and sea, and satisfaction levels tend to have dropped since we asked the same questions in 2019.

For example, in Jersey:

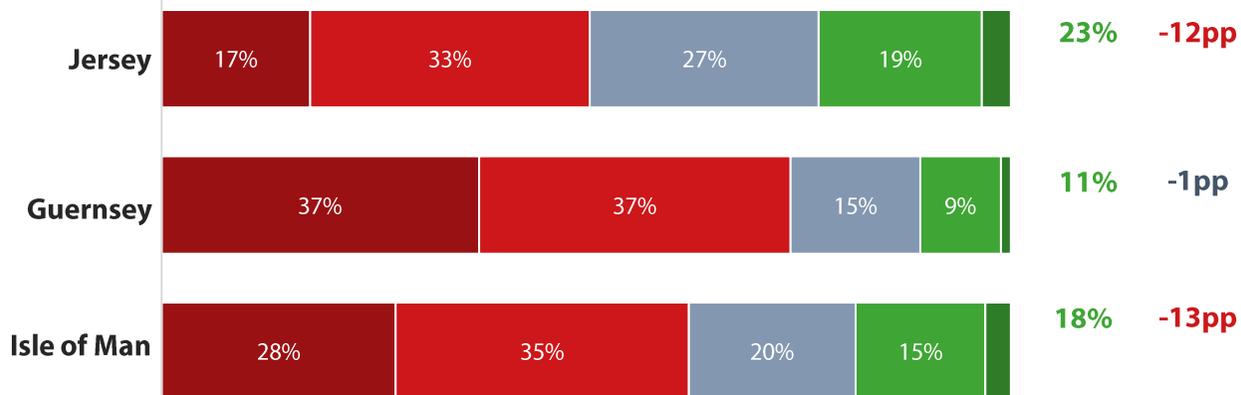
- 23% were satisfied or very satisfied with the cost of air links (i.e. travel by plane), while 50% were dissatisfied or very dissatisfied.
- By comparison, 10% were satisfied or very satisfied with the cost travelling by sea and 62% were dissatisfied or very dissatisfied.
- The percentage of people satisfied or very satisfied has dropped 12 and 14 percentage points respectively.

Similarly, in Guernsey there are low levels of satisfaction with cost of air travel (11%), but this is no worse than seen 2019. More positively, 39% are satisfied or very satisfied with the cost of travelling by ferry which is up 17 percentage points on 2019.

% sat / very sat vs 2019



Satisfaction with the cost of off-island travel by air



Satisfaction with the cost of off-island travel by sea



Totals may not sum to 100% due to rounding



SATISFACTION: RELIABILITY OF TRAVELLING OFF-ISLAND

Respondents were asked “Personally, how satisfied are you with the reliability of travel off-island travel by air / by sea?”

In Jersey and the Isle of Man less than 40% are satisfied with the reliability of travel by air and sea, and satisfaction levels have dropped significantly since we asked the same questions in 2019.

In Jersey this drops to as low as 10% of people satisfied with the reliability of sea travel, a 14 percentage point reduction since 2019.

The Isle of Man sees some of the largest reductions in satisfaction with reliability. 17% are satisfied with reliability of air travel, a drop of 29 percentage points, while 27% are satisfied with reliability by sea which is 33 percentage points lower than compared to 2019.

The picture is similar in Guernsey for air travel: a quarter are satisfied with reliability which is a 26pp drop. However, views on sea travel from Guernsey are more positive: 43% are satisfied or very satisfied with the reliability of off-island ferries, which is up 20 percentage points since 2019.

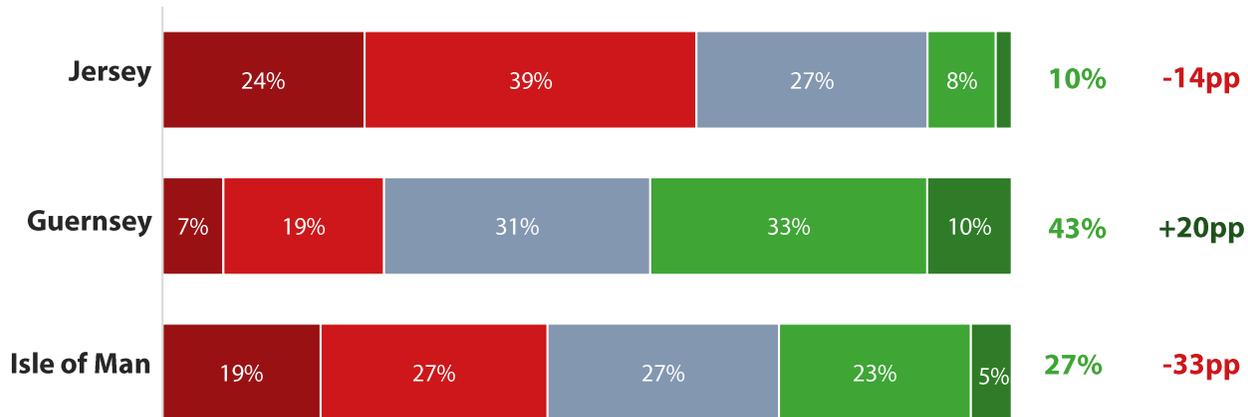
% sat / very sat vs 2019



Satisfaction with the reliability of off-island travel by air



Satisfaction with the reliability of off-island travel by sea



Totals may not sum to 100% due to rounding



SATISFACTION: CHOICE OF DESTINATIONS

Respondents were asked “Personally, how satisfied are you with the choice of off-island destinations by air / by sea?”

At most quarter of people in Jersey and the Isle of Man are satisfied with the choice of destinations available by air and by sea. Again, satisfaction levels have dropped significantly since we asked the same questions in 2019.

The largest decrease in satisfaction that we have recorded is in the Isle of Man 17% are satisfied with choice of destinations by air, which is a 42 percentage point drop since 2019

In Guernsey, 32% are satisfied with the choice of destinations by air. Although slightly higher than the other two islands this is still a drop of 30 percentage points compared to 2019.

In contrast, 39% are satisfied or very satisfied with the choice of destinations by sea from Guernsey, which is up 17 percentage points since 2019.

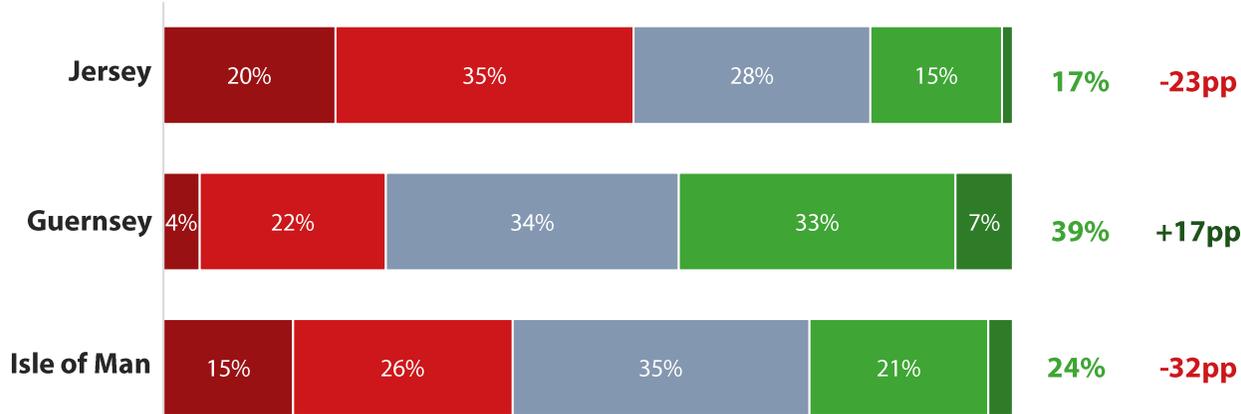
% sat / very sat vs 2019



Satisfaction with the choice of off-island destinations by air



Satisfaction with the choice of off-island destinations by sea



Totals may not sum to 100% due to rounding



CONFIDENCE IN TRAVEL LINKS



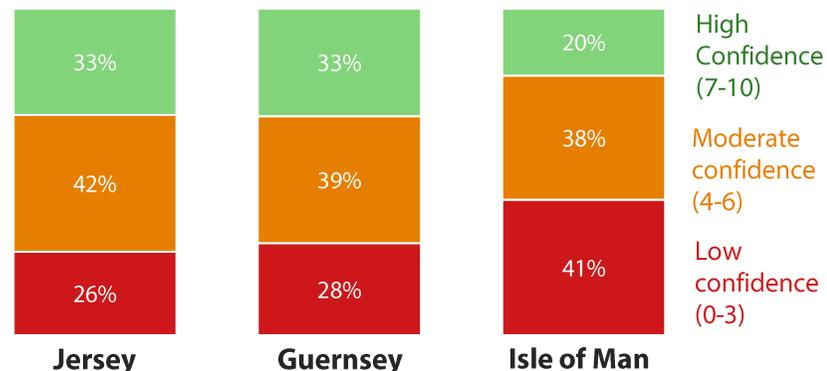
CONFIDENCE IN SERVICES: FOR RESIDENTS

Respondents were asked “Thinking more broadly about air and sea links for the community over the next 5 years... How confident are you that off-island travel links will meet the needs of the following groups? Please answer on a scale from 0- to 10, where 0 is not at all and 10 is extremely confident.

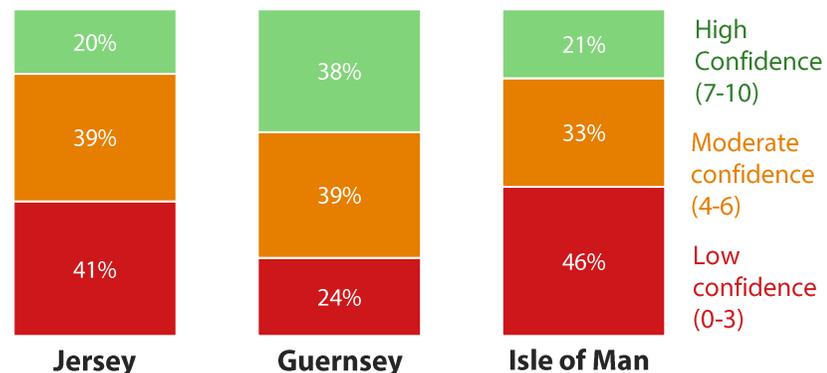
- In both Jersey and Guernsey, a third of respondents who had a view had a high level of confidence (score 7 or above) that travel links will meet the needs of residents travelling for personal or business reasons. Just over a quarter have a lower level of confidence (scored 3 or under).
- When it comes to the security of vital lifeline routes, there were higher levels of confidence in Guernsey than in Jersey. In Guernsey 38% had a high level of confidence, while it was just 20% in Jersey. This finding correlates with satisfaction by mode of transport – with Guernsey residents more satisfied with sea links than Jersey residents.
- In the Isle of Man, only 1 in 5 have a high level of confidence that the travel links will meet the needs of residents travelling off-island and provide security of vital lifeline routes. Over 40% have a low level of confidence (giving a score of 3 or under).

Appendix B contains additional detail on the percentage of respondents who gave each score.

Confidence in off-island travel links meeting the needs of residents travelling for personal or business reasons



Confidence in off-island travel links meeting the needs of security of vital lifeline routes



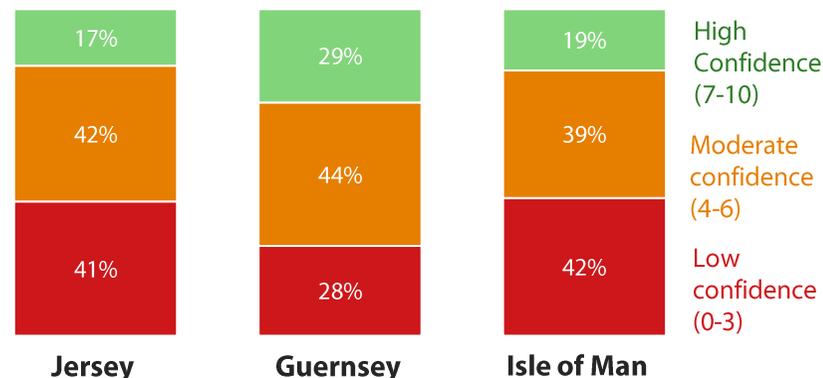
CONFIDENCE IN SERVICES: FOR BUSINESS

Respondents were asked “Thinking more broadly about air and sea links for the community over the next 5 years... How confident are you that off-island travel links will meet the needs of the following groups? Please answer on a scale from 0- to 10, where 0 is not at all and 10 is extremely confident.

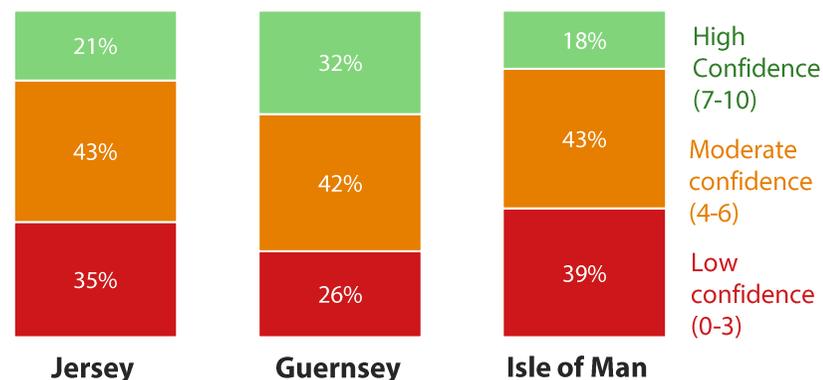
- 29% of respondents in Guernsey indicated they have a high level of confidence that the travel links will meet the needs of businesses who import / export goods, including 5% who scored 9-10. Just over a quarter have a low confidence. There are similar levels of confidence that travel links will meet the needs of tourists.
- The results for Jersey and the Isle of Man are less favourable. Around 1 in 5 have a high level of confidence that travel links will meet the needs of these economic contributors (with results ranging from 17% to 21%). There are around twice as many who have a low level of confidence (i.e. gave a score between 0-3).

Appendix B contains additional detail on the percentage of respondents who gave each score.

Confidence in off-island travel links meeting the needs of business that import / export goods



Confidence in off-island travel links meeting the needs of tourists / visitors to the island



Excludes “No View”. Totals may not sum to 100% due to rounding

FINAL COMMENTS



FINAL COMMENTS: JERSEY



Comments provided by respondents showed widespread dissatisfaction with travel to and from Jersey. The most common themes reflect the earlier elements asked about of choice, cost and reliability:

Limited Connectivity

- The ferry schedule was criticised by a number of respondents.
- There were frequent calls for better inter-island connectivity with Guernsey, as well as better connections with France, both of which are thought to have gotten worse for residents with recent changes.
- Also, many requested more regular flights to UK regional airports (e.g. East Midlands, Birmingham, Leeds Bradford) and European destinations. This is characterised as needing to be more regular throughout the year as week as throughout the week to different destinations.

High Costs

- Respondents often express frustration over the high cost of both air and sea travel, especially for short routes like Jersey to Guernsey or Southampton.
- A few mention that travel costs deter both residents and tourists from taking short breaks.

Unreliable

- Off-island travel is often described as unreliable, particularly by ferry, but airlines also come under criticism. Weather-related disruptions are acknowledged as part of island life but still add to the frustration.
- A couple take the opportunity to reiterate the fragile nature of lifeline services such as medical routes and food importation.

"I see the island being isolated in the near future. It will be a luxury to go off island."

Additional themes some respondents chose to highlight include:

- The handling of travel contracts, particularly with DFDS, are criticised.
- A few residents say they feel 'trapped', with a small number noting difficulty in visiting family or accessing medical care.
- A few worry about the impact of travel connections on tourism, while others describe how strong connections are reliant on a buoyant visitor economy.
- There were a couple of comments about the difficulty in attending inter-island sporting fixtures and similar.
- There are some calls for increased competition among airlines and ferry operators to deliver better value for money through improved service and reduced prices.



FINAL COMMENTS: GUERNSEY



Many of those who left a comment chose to highlight their concern with the cost and reliability of air travel, balanced out by more positive views about how travel by sea has been improving.

High costs and unreliability of air travel

- The most common complaints related to the price and unreliability of air travel. Many felt costs were particularly high for families and may be discouraging visitors, with potential negative effects on the visitor economy. The implications of being a small island with small economies of scale are acknowledged by some, but not everyone takes this into consideration.
- Weather disruptions were acknowledged as inevitable but still added to frustration. Some residents attributed poor reliability to the condition of Aurigny's fleet, alongside pressures on staffing and aircraft availability.
- Low reliability often leads people to travel a day early to protect onward connections. This, alongside last-minute cancellations when returning to the island, adds to the cost of travel.

Mixed views on competition

- Some residents called for increased competition to improve value and reliability.
- Others stressed the importance of protecting Aurigny's long-term viability, with concern that other carriers may not maintain lifeline routes.
- This divide in views is seen in the comments about the introduction of the BA Heathrow route.

"The cost of air travel is starting to impact my family in the UK, who have three children. It's very expensive for 5 people."

Connectivity by air

- Comments included concerns about limited links to Alderney and Jersey.
- Direct flights to Europe (e.g. via FlyDirect) were praised.
- Some called for more direct European routes, while others recognised the constraints of serving a small island market.
- Two comments highlighted challenges with wheelchair accessibility, noting that some local aircraft cannot accommodate larger wheelchairs.

Sea travel has improved for the most part

- Many noted improvements in sea travel, aligning with the increases in satisfaction recorded earlier in the report. Some commented that they have more confidence in ferry links than they do air links now that Brittany Ferries have taken over.
- Brittany Ferries received praise, particularly for improvements to the sailing timetable to the UK. However, there were also a small number of comments about how the timings of the sailings to France no longer suit the local traveler as well as they used to.



FINAL COMMENTS: ISLE OF MAN



The majority of the comments are about a lack of reliability by air and sea. This is followed by concerns about the expense of travelling. People tend to feel that reliability is worse than in the past.

Unreliable

- Reliability was the most common concern, with many saying both air and sea services now experience more disruption than in the past.
- Travel is seen as increasingly weather-dependent, and some feel the current ferry is less reliable in poor conditions than previous vessels.
- Ongoing operational and infrastructure issues at the airport, particularly around Air Traffic Control, are widely believed to contribute to delays.
- Declining reliability has led residents to travel earlier than necessary to avoid missing onward connections, adding stress and inconvenience.

High Costs

- Many residents are frustrated by the cost of travelling off-island by both air and sea.
- Costs feel particularly high for relatively short journeys.
- Additional expenses, such as overnight stays due to cancellations, taxis, or kennelling, are frequently mentioned and increase the total cost of travel. A few respondents suggested introducing resident discounts.
- Some say travel costs deter both residents and visitors, with knock-on effects on wellbeing and local businesses.

“Too many times these days throughout the year, the traveling links by boat or air are cancelled or disrupted. It used to be a rare occasion, now it is weekly, sometimes daily.”

Additional themes some respondents chose to highlight include:

- Requests for better connectivity, including more destinations and improved schedules.
- Concerns about the condition of the ferry terminal.
- Low confidence in government action to address issues or protect vital routes.
- A very small number raised concerns about border security checks.
- A minority noted that while they prefer one travel mode over the other, they remain generally satisfied with the routes they choose.



APPENDIX A: PROFILE OF RESPONDENTS

The profile of people who completed the survey was compared to the latest available data on the population of Jersey, Guernsey and the Isle of Man.

Survey responses were weighted in proportion to the age and gender profile of the adult population on both islands. All figures, tables and text presented in this report refer to weighted responses, unless otherwise specified.

Please refer to Appendix A for the demographic profile of respondents by island after weighting.

About survey weights

Survey weights correct for age and gender differences between the sample and the population. Thus, they compensate for different patterns of non-response from different sub-groups of the population, such that survey results can be generalised from the sample back to the population from which they are drawn.

Fewer under 30s participated in the survey and weights for these age groups have been capped at 3.0. The results are therefore largely representative by age and gender of the adult population aged 30+.

Results rounded to the nearest integer

All calculations were independently rounded so totals published in tables and graphs may not necessarily sum 100%.

The table shows the age and gender profile of the adult population living in the Islands, and the profile of the sample who completed the survey. It also shows the profile of the sample after weights have been applied.

		Population	Survey	
		%	% of sample	% after survey weights
Age group				
	16-24	11%	<1%	1%
	25-29	7%	1%	3%
	30-34	7%	2%	6%
	35-39	8%	3%	8%
	40-44	8%	4%	8%
	45-49	8%	6%	9%
	50-54	9%	9%	12%
	55-59	9%	13%	12%
	60-64	8%	17%	10%
	65-69	6%	17%	8%
	70-74	6%	13%	8%
	75+	11%	15%	14%
	Prefer not to say	-	1%	1%
Gender				
	Female	51%	59%	55%
	Male	49%	39%	44%
	Prefer to self-describe	*	<1%	<1%
	Prefer not to say	-	1%	1%

* Gender is not available for the population, and biological sex has been used as a proxy for gender

APPENDIX A: DEMOGRAPHIC PROFILE BY ISLAND

AFTER WEIGHTING

	Jersey	Guernsey	Isle of Man
Age group			
Under 40	22%	23%	13%
40-64	51%	48%	53%
65+	27%	29%	32%
Prefer not to say	<1%	1%	2%
Gender			
Female	58%	52%	52%
Male	41%	46%	46%
Prefer to self-describe	0%	1%	0%
Prefer not to say	0%	0%	0%
Household Income			
Up to £40,000	24%	24%	31%
£40,001-£80,000	33%	33%	37%
Over £80,000	43%	43%	31%

	Jersey	Guernsey	Isle of Man
Employment Status			
Full time employed	50%	49%	43%
Part time employed	12%	10%	9%
Self employed	7%	6%	6%
In full time education	<1%	1%	<1%
Retired	27%	28%	36%
Other	<1%	1%	1%
Prefer not to answer	1%	1%	1%

APPENDIX B: CONFIDENCE IN FUTURE TRAVEL LINKS

FULL SPREAD OF RESULTS (0 –not at all confident to 10- Extremely confident)

	Jersey	Guernsey	Isle of Man
Residents travelling for personal or business reasons			
0 - not at all	6%	6%	11%
1	2%	4%	6%
2	7%	7%	11%
3	11%	12%	13%
4	12%	11%	11%
5	19%	16%	18%
6	11%	11%	10%
7	16%	16%	11%
8	10%	12%	7%
9	3%	3%	1%
10- extremely	4%	2%	2%

	Jersey	Guernsey	Isle of Man
Security of vital lifelines			
0	9%	6%	14%
1	5%	4%	7%
2	10%	5%	11%
3	17%	9%	14%
4	10%	10%	11%
5	16%	18%	14%
6	13%	11%	8%
7	9%	14%	10%
8	6%	12%	7%
9	2%	6%	2%
10	2%	6%	2%

	Jersey	Guernsey	Isle of Man
Businesses that import / export goods			
0 - not at all	9%	5%	12%
1	7%	5%	6%
2	10%	7%	11%
3	15%	11%	13%
4	13%	15%	14%
5	19%	18%	15%
6	9%	11%	10%
7	10%	13%	7%
8	4%	11%	7%
9	1%	3%	3%
10- extremely	1%	2%	2%

	Jersey	Guernsey	Isle of Man
Tourists / visitors to the island			
0 - not at all	6%	5%	9%
1	3%	4%	6%
2	9%	7%	12%
3	17%	11%	12%
4	12%	13%	15%
5	17%	17%	19%
6	14%	12%	8%
7	13%	16%	10%
8	6%	11%	5%
9	1%	3%	1%
10- extremely	1%	1%	2%





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