

Performance of Guernsey's air links

Summary findings of the analysis of air connectivity, affordability and reliability

Research completed in 2024

Guernsey performs as well or better than Jersey and the Isle of Man in reliability and connectivity but is more costly than both on comparable routes.

- This report delivers a benchmarking analysis of key performance metrics, related to Guernsey's air connectivity, reliability and affordability. The key findings are useful for informing CÆD's thinking on future air links policy, including Guernsey's 'quasi-open skies' policy.
- The available data suggests that Guernsey has reasonable air connectivity to the UK:
 - a similar number of routes and flights compared to similar jurisdictions
 - sees fewer people flying than Jersey, but broadly in-line with population differences
- Guernsey flights are also reliable compared to Jersey and the Isle of Man (pre-2024):
 - flight delays (of more than 30 mins) and cancellations compare favourably with other jurisdictions
 - although performance is worse on some lower frequency routes (e.g., Birmingham, Manchester, Leeds and Exeter)
- Guernsey flights do appear to cost more than those from Jersey or the Isle of Man:
 - Guernsey flights on the most popular routes appear to cost 15% to 30% more than those in Jersey and the Isle of Man, depending on which comparator routes are used
 - differential airport charges are likely to explain a small proportion of that difference, if any
 - other jurisdictions may offer subsidies on some routes for some carriers which are not included in the analysis.

The analysis supports the consideration of further measures to improve the affordability of flights.

Frontier were asked by the Committee for Economic Development to provide an analysis of connectivity, affordability and reliability of flights to/from Guernsey.

- Frontier undertook, at the request of the Committee for Economic Development (CfED), a performance benchmarking analysis of three characteristics of air links to and from Guernsey:
 - Connectivity: the number of flights, routes and passengers from Guernsey to other destinations
 - Affordability: the average cost of flights departing from Guernsey
 - Reliability: the number of delays and cancellations of flight departing from Guernsey
- In each case we have compared the results for Guernsey to other similar comparator airports, recognising that there is no identical comparator.
- We also provide some commentary on the links between the patterns observed and Guernsey's quasi-open sky policy.
- This work was intended to provide some factual evidence in response to an inquiry from CfED. It was undertaken between August and September 2024. More detailed analysis could be done over a longer period to better understand the trends, comparisons and drivers of differences that are found in this work.

Conclusions: Over last 5 to 7 years, Guernsey air links perform well in terms of connectivity and reliability but are more expensive.

- As an island economy and society, it is critical that Guernsey's air links are fit for purpose, with strong performance across air connectivity, reliability and affordability. Our analysis shows that Guernsey's air connectivity and reliability appears to be in line with key comparators (Jersey and Isle of Man) across a range of metrics when compared over the past 5 to 7 years, albeit performance has been worse in 2024.
- We also find that Guernsey's air links on higher demand routes to UK destinations are more expensive than similar routes for Jersey and Isle of Man. This is based on the best available data source, with findings generated over a sample period of 2016 to 2023. Insufficient data is available to allow robust comparisons for shorter time periods.
- Guernsey air fares on these routes appear to be about 15 to 30% higher than Jersey and Isle of Man on similar routes. These figures account for Guernsey charging lower air fares on some regional UK destinations (e.g. Bristol, Exeter), compared to Jersey.
- More sophisticated statistical analysis replicates this difference in air fares between Guernsey and comparators. This indicates that the observed difference between Guernsey air fares and Jersey and Isle of Man fares appears to be due to differences in aircraft size, the degree of competition on routes, and other factors potentially including demand for air travel.

Annex – methodology

We draw on data from two widely used and recognised data sets...

Connectivity

- Annual data on schedules and traffic is used from [OAG-Aviation](#) to report on Connectivity metrics for Guernsey and all comparator airports over the period 2010-2023.
- These metrics are for both operating and codeshare flights from Guernsey to UK/EU or other comparable mainland destinations.
 - number of routes;
 - number of flights;
 - number of passengers

Affordability

- Annual data on traffic is used from [OAG-Aviation](#) to report on Affordability metrics for Guernsey and all comparator airports over the period 2016-2023.
- Average fare data excludes taxes, fees and fuel surcharges, but does include commission payments. Non-revenue tickets are excluded from the calculation. This data is supplied by Travelport and reported in USD.
- Missing values are imputed using an online fare metric generated by OAG using RDC and OTA APIs. This is adjusted using the ratio of average fare to online fare, where both are available for an airport.

Reliability

- Annual data on punctuality is used from the [Civil Aviation Authority](#) to report on Reliability metrics for Guernsey and core comparator airports over the period 2018-2023.
- Data from multiple reporting airports for each origin and destination across intervals is aggregated to get the proportion and number of:
 - scheduled flights delayed by over 30 mins;
 - scheduled flights cancelled

...these data are the best available, but they have limitations that need to be taken into account when interpreting the results.

Connectivity

- Connectivity metrics have few if any specific limitations and broadly cover all relevant dimensions of connectivity. However, routes and related dimensions of connectivity can change quickly and in a small airport like Guernsey small changes (e.g during peak seasons) could make a significant difference to perceptions of connectivity.

Affordability

- Average fare data and generated online fare metric is provided by OAG data querying platform. However, as this data is supplied by an external partners to OAG, it is subject to missing values.
- Missing values are imputed using an online fare metric generated by OAG using RDC and OTA APIs. This is adjusted using the ratio of average fare to online fare, where both are available for an airport.
- In practice, average fare values are available across all key air routes including Guernsey and comparators, across the period 2016-23. Data on average fares has some missing values, but is available for:
 - 54% of route-year combinations for Guernsey; 82% route-year combinations for IoM; 87% route-year combinations for Jersey.

Reliability

- Guernsey is not listed as a reporting airport in the CAA punctuality datasets. Therefore, the analysis relies on the reporting by the given airports where the origin or destination is Guernsey and the comparator airports.
 - This is based on the assumption that for a given airport, a flight departed late or arrived late.
- Intervals for reporting delays changed over time and are aggregated to ensure consistency over time.
 - For example, # of flights delayed by 61-180m = # of flights delayed by 61-120m + # of flights delayed by 121-180m.
- The dataset excludes unmatched flights, i.e., flights that took place but for which no corresponding planned flight was found.

- There is greatest uncertainty about the measurements of affordability. It was not possible to understand, within the scope of this study, whether the available average fare observations on a route for Guernsey, Jersey and Isle of Man are representative of all flights on those routes. We have done some statistical analysis to test the available data.
- The data on reliability is also subject to some uncertainty because of changes in delay reporting intervals, lack of direct reporting from the airport, and exclusion of unmatched flights. The data may not capture the full performance of the airport.



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