2014 Travel Survey

for the States of Guernsey Commerce & Employment Department

RESEARCH REPORT ON Q2 2014

August 18th 2014

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Summary of Results for Q2

	2013	2014	% change
Total departing passengers	**165,400**	**173,100**	**+4.6%**
Total departing visitors	98,800	93,300	-5.5%
Departing visitors by air	58,250	51,500	-11.6%
Departing visitors by sea	40,500	41,850	+3.3%
Staying leisure visitors	47,100	44,000	-6.4%
Visiting friends and relatives	15,000	12,850	-14.5%
Staying business / conference	11,800	10,800	-8.4%
Leisure day visits	12,400	14,300	+15.8%
Business day visits	8,300	5,600	-32.8%
Total for the above purposes of visit *	**94,600**	**87,600**	**-7.4%**
Total staying visitors	73,400	68,600	-6.5%
Average length of stay	4.46 nights	4.47 nights	+0.2%
Total overnight stays (bed nights)	326,500	305,000	-6.6%
Total staying in commercial accommodation	57,200	54,650	-4.4%
Average stay in commercial accommodation	4.22 nights	4.16 nights	-1.4%
Bed nights in commercial accommodation	241,500	227,400	-5.8%
Cruise ship passengers **	54,410	50,390	-7.4%
Day visits	25,400	24,750	-2.6%
UK visitors	65,600	62,500	-4.7%
Jersey visitors	10,400	10,600	+2.5%
Other nationalities	22,800	20,200	-11.6%
Departing Guernsey residents	66,150	79,400	+20.1%
Departing residents by air	48,550	55,700	+14.7%
Departing residents by sea	17,600	23,700	+34.8%
Net Promoter Score		73%	

N.b. All of the above figures exclude passengers on the inter-Bailiwick air and sea routes of Alderney, Sark and Herm.

* These figures exclude "Other staying", "Other day" and "Long stay" visitors as shown in the breakdown on page 2 and as defined in the appendices.

** Cruise passenger numbers are in addition to the Total Departing Passengers shown at the top of the page which only include passengers departing through the Airport and Harbour passenger terminals.

Summary of Results – January to June

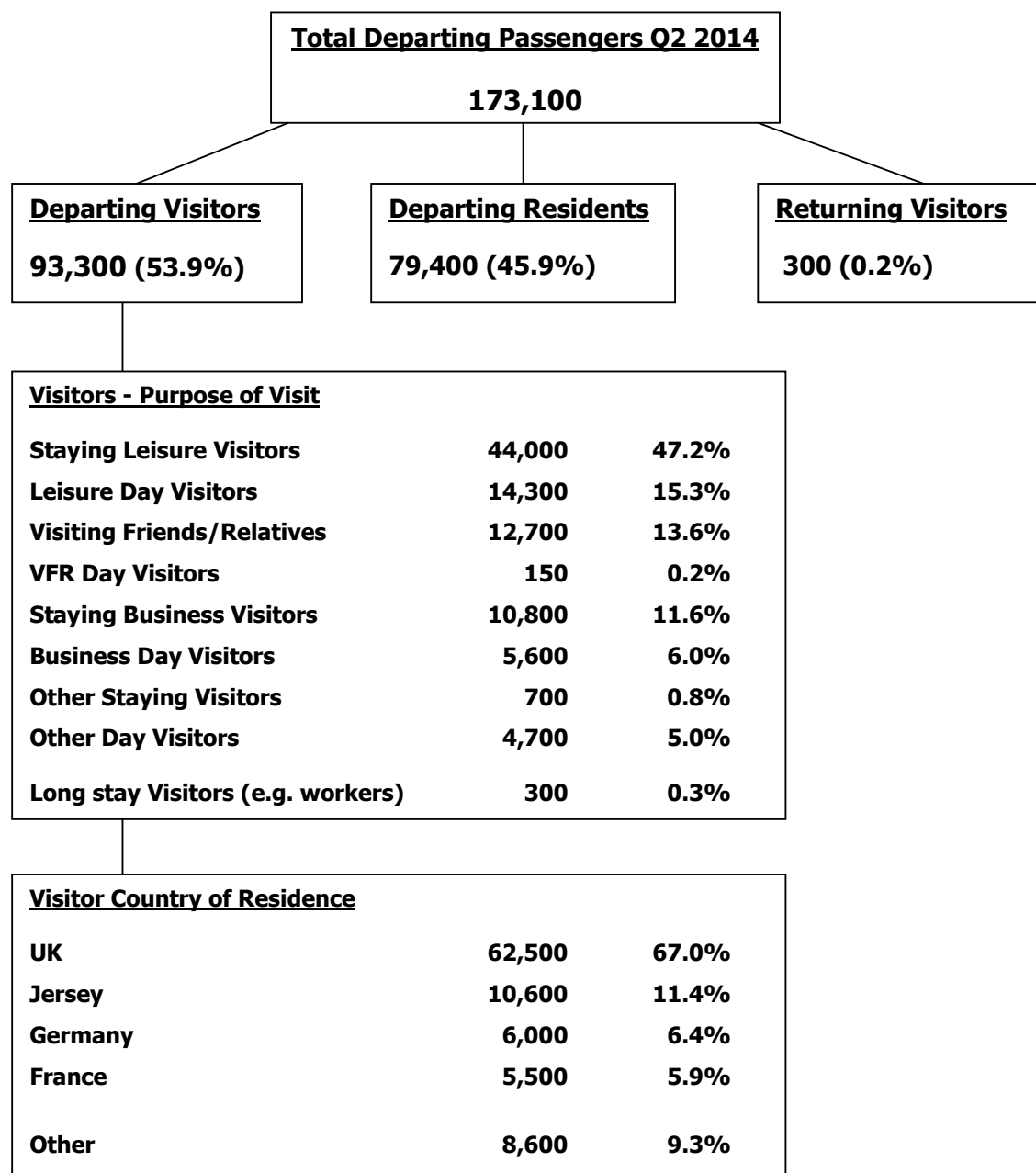|	**2013**	**2014**	**% change**
Total departing passengers	**260,700**	**264,900**	**+1.6%**
Total departing visitors	135,700	130,000	-4.2%
Departing visitors by air	90,500	83,600	-7.6%
Departing visitors by sea	45,200	46,400	+2.6%
Staying leisure visitors	55,600	53,000	-4.7%
Visiting friends and relatives	24,100	21,800	-9.3%
Staying business / conference	20,800	19,650	-5.7%
Leisure day visits	13,300	16,600	+24.6%
Business day visits	15,400	11,800	-23.2%
Total for the above purposes of visit *	**129,200**	**122,900**	**-4.9%**
Total staying visitors	100,500	95,750	-4.7%
Average length of stay	4.33 nights	4.36 nights	+0.6%
Total overnight stays (bed nights)	433,200	414,150	-4.4%
Total staying in commercial accommodation	74,900	72,400	-3.3%
Average stay in commercial accommodation	3.96 nights	3.90 nights	-1.5%
Bed nights in commercial accommodation	296,700	282,600	-4.7%
Cruise ship passengers **	54,410	50,660	-6.9%
Day visits	35,300	34,300	-2.8%
UK visitors	92,200	88,900	-3.6%
Jersey visitors	17,300	17,400	+0.7%
Other nationalities	26,200	23,700	-9.7%
Departing Guernsey residents	124,300	134,400	+8.1%
Departing residents by air	98,300	105,100	+7.0%
Departing residents by sea	26,000	29,250	+12.6%
Net Promoter Score		71.5%	

N.b. All of the above figures exclude passengers on the inter-Bailiwick air and sea routes of Alderney, Sark and Herm.

* These figures exclude "Other staying", "Other day" and "Long stay" visitors as shown in the breakdown on page 2 and as defined in the appendices.

** Cruise passenger numbers are in addition to the Total Departing Passengers shown at the top of the page, which only include passengers departing through the Airport and Harbour passenger terminals.

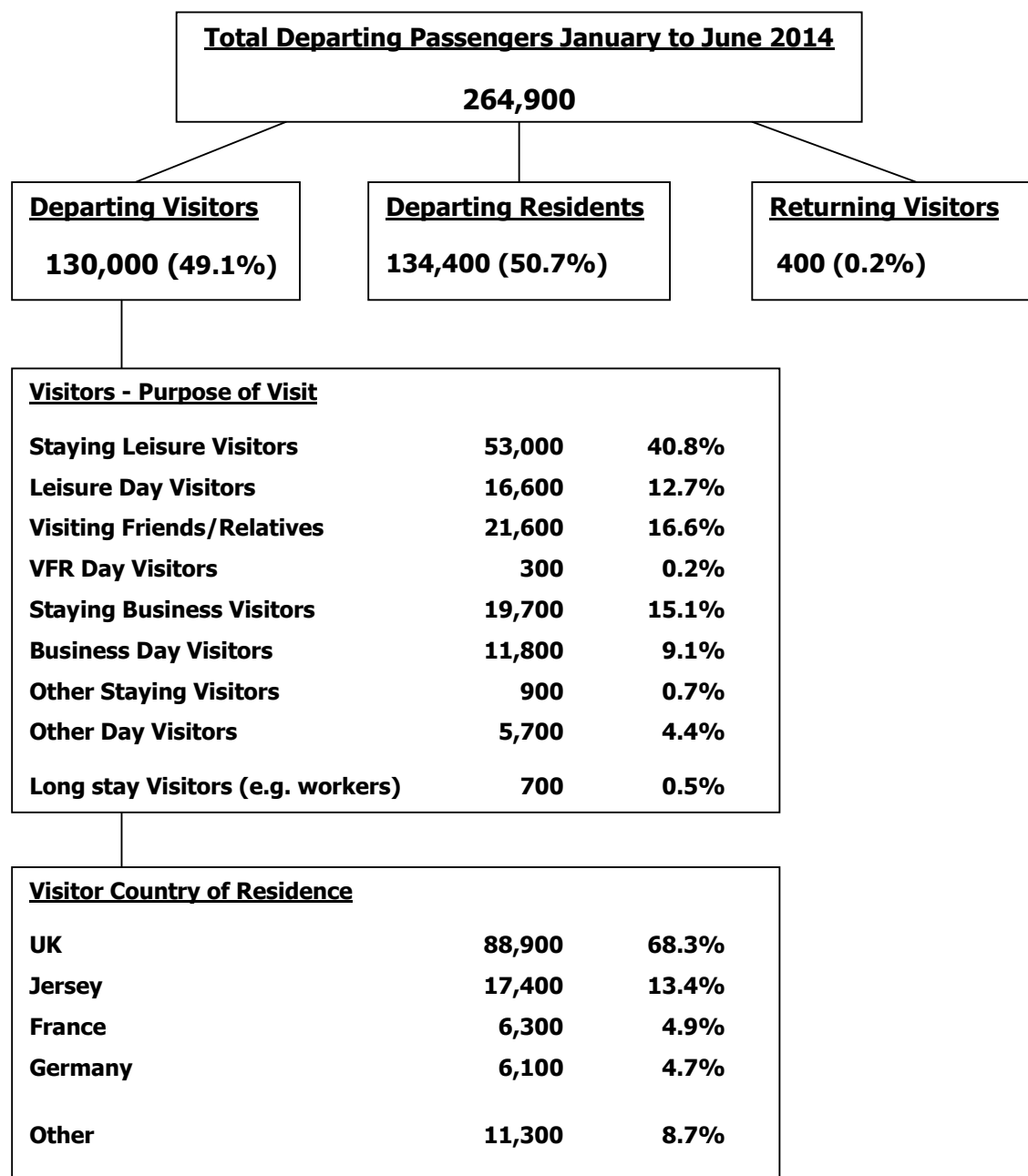## Q2 Survey Results – Excluding Alderney, Sark and Herm Departures

Excluding the Alderney, Sark and Herm routes, the passenger numbers for the **second quarter** of 2014 were broken down as follows:

Total Departing Passengers Q2 2014
173,100

Departing Visitors	**Departing Residents**	**Returning Visitors**
93,300 (53.9%)	**79,400 (45.9%)**	**300 (0.2%)**

Visitors - Purpose of Visit

Staying Leisure Visitors	44,000	47.2%
Leisure Day Visitors	14,300	15.3%
Visiting Friends/Relatives	12,700	13.6%
VFR Day Visitors	150	0.2%
Staying Business Visitors	10,800	11.6%
Business Day Visitors	5,600	6.0%
Other Staying Visitors	700	0.8%
Other Day Visitors	4,700	5.0%
Long stay Visitors (e.g. workers)	300	0.3%

Visitor Country of Residence

UK	62,500	67.0%
Jersey	10,600	11.4%
Germany	6,000	6.4%
France	5,500	5.9%
Other	8,600	9.3%

In addition to the above, there were **50,390 passengers on cruise ships** arriving in Guernsey over the period April to June.

## Cumulative Survey Results – January to June

Excluding the Alderney, Sark and Herms routes, the passenger numbers for the **first and second quarters** of 2014 were broken down as follows:

Total Departing Passengers January to June 2014

264,900

Departing Visitors	**Departing Residents**	**Returning Visitors**
130,000 (49.1%)	**134,400 (50.7%)**	**400 (0.2%)**

Visitors - Purpose of Visit

Staying Leisure Visitors	**53,000**	**40.8%**
Leisure Day Visitors	**16,600**	**12.7%**
Visiting Friends/Relatives	**21,600**	**16.6%**
VFR Day Visitors	**300**	**0.2%**
Staying Business Visitors	**19,700**	**15.1%**
Business Day Visitors	**11,800**	**9.1%**
Other Staying Visitors	**900**	**0.7%**
Other Day Visitors	**5,700**	**4.4%**
Long stay Visitors (e.g. workers)	**700**	**0.5%**

Visitor Country of Residence

UK	**88,900**	**68.3%**
Jersey	**17,400**	**13.4%**
France	**6,300**	**4.9%**
Germany	**6,100**	**4.7%**
Other	**11,300**	**8.7%**

In addition to the above, there have been **50,660 passengers on cruise ships** arriving in Guernsey up to the end of June.
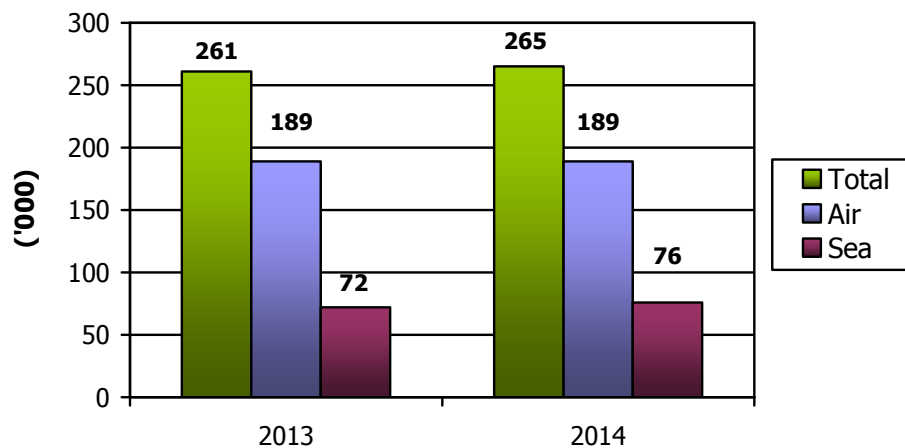
Comparisons with 2013

Passenger Departures Q2 2013 and 2014
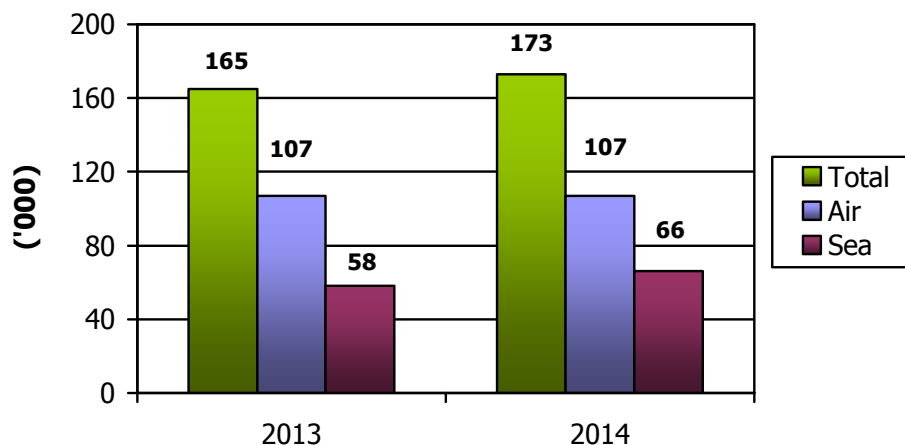
The above figures exclude air and sea departures to Herm, Sark and Alderney.

Compared to Quarter 2 2013, there has been a 4.6% increase in passenger departures from Guernsey, with a 0.4% increase in passenger departures by air and a 12.3% increase in passenger departures by sea.

Passenger Departures January to June 2013 and 2014

The above figures exclude air and sea departures to Herm, Sark and Alderney.

Compared to the first 6 months of 2013, there has been a 1.6% increase in passenger departures from the Bailiwick, with the same number of passenger departures by air and a 5.8% increase in passenger departures by sea.

Visitors vs. Residents Q2 2013 and 2014
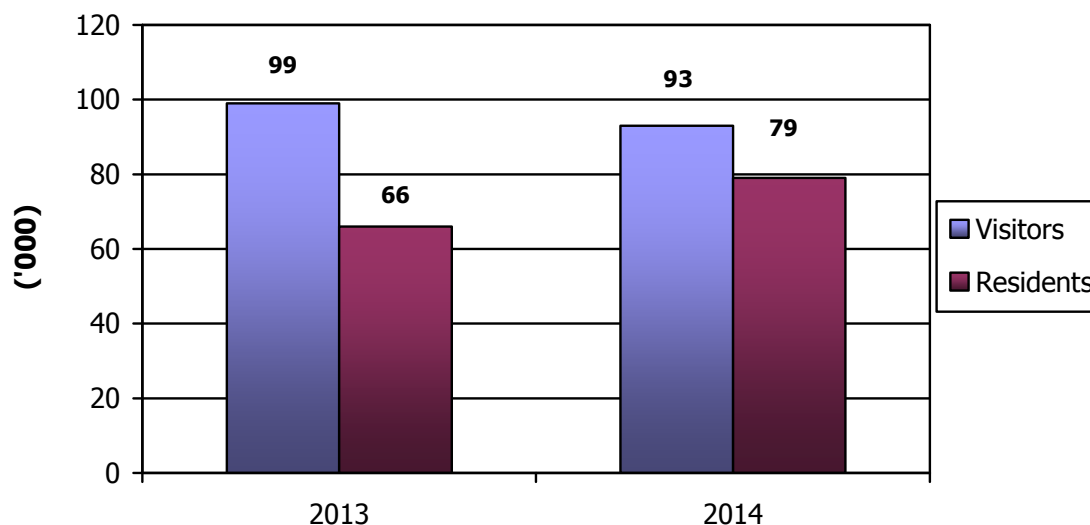
Excluding travel from within the Bailiwick, there were **93,300 visitor departures** between April and June 2014 and **79,400 resident departures**.
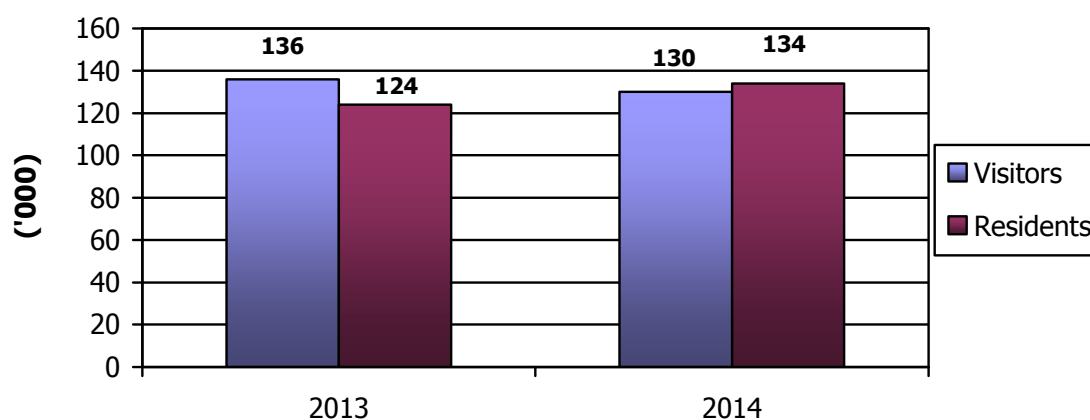
Visitor departures have **decreased overall by 5.5%** compared to Quarter 2 2013.

Excluding "returning visitors", 54.0% of departing passengers in Quarter 2 2014 were visitors to Guernsey, compared to 59.9% over the same period in 2013.

For air passengers, 51,500 (47.9%) were departing visitors and 55,700 were departing residents.

For sea passengers, 41,900 (63.8%) were departing visitors and 23,700 were departing residents.

Visitors vs. Residents January to June 2013 and 2014

Excluding travel from within the Bailiwick, there were **130,000 visitor departures** between January and June 2014 and **134,400 resident departures**.

Visitor departures have **decreased overall by 4.2%** compared to the same period in 2013.

Excluding the 400 "returning visitors", 49.2% of departing passengers over the first 6 months of 2014 were visitors to Guernsey, compared to 52.2% over the same period in 2013.

For air passengers, 83,600 (44.2%) were departing visitors and 105,100 were departing residents.
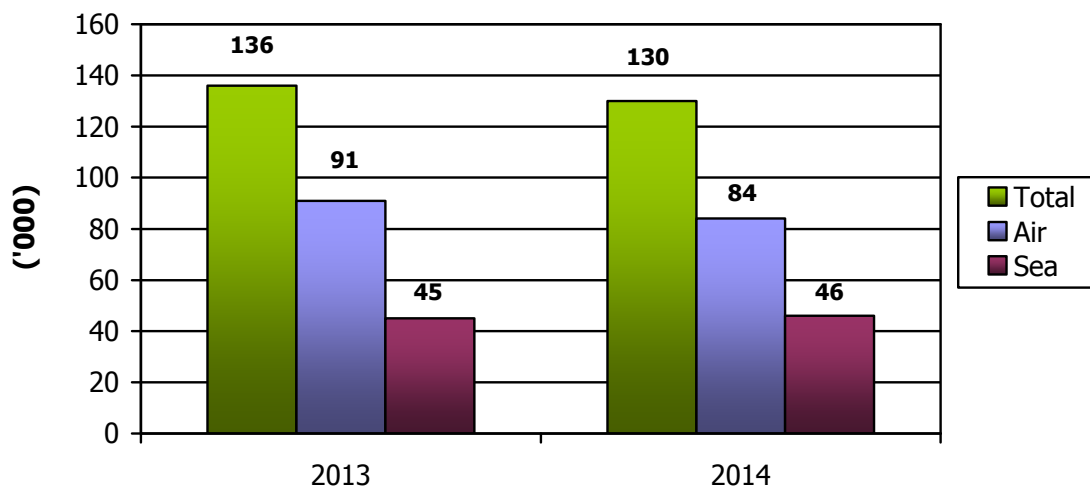
For sea passengers, 46,400 (61.3%) were departing visitors and 29,200 were departing residents.

## Visitor Volumes by Travel Method Q2 2013 and 2014
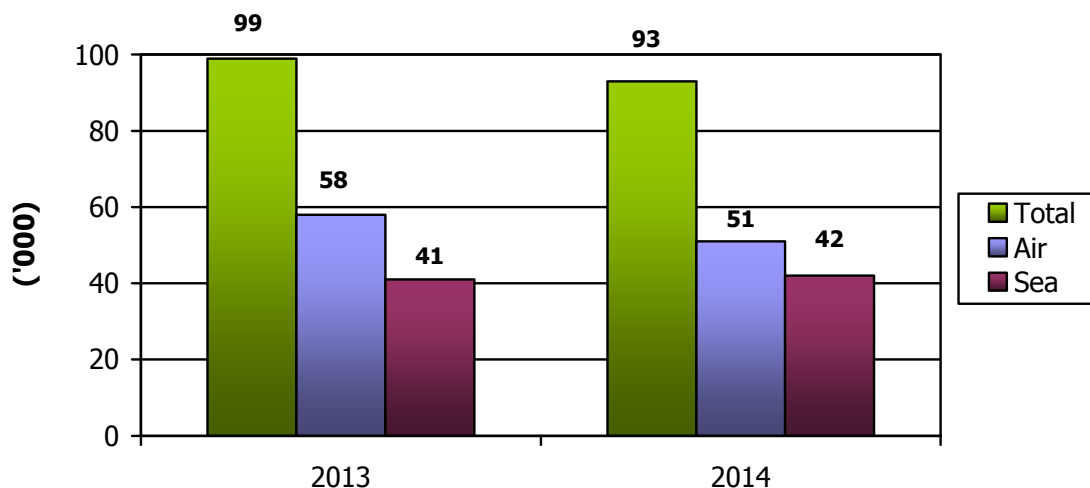
Compared to Quarter 2 2013, there has been an 11.6% decrease in visitors to Guernsey by air and a 3.3% increase in visitors by sea.

## January-June Visitor Volumes by Travel Method 2013 and 2014

Compared to the first 6 months of 2013, there has been a 7.6% decrease in visitors to Guernsey by air and a 2.6% increase in visitors by sea.

## Visitor and Resident Departures by Month 2013 and 2014
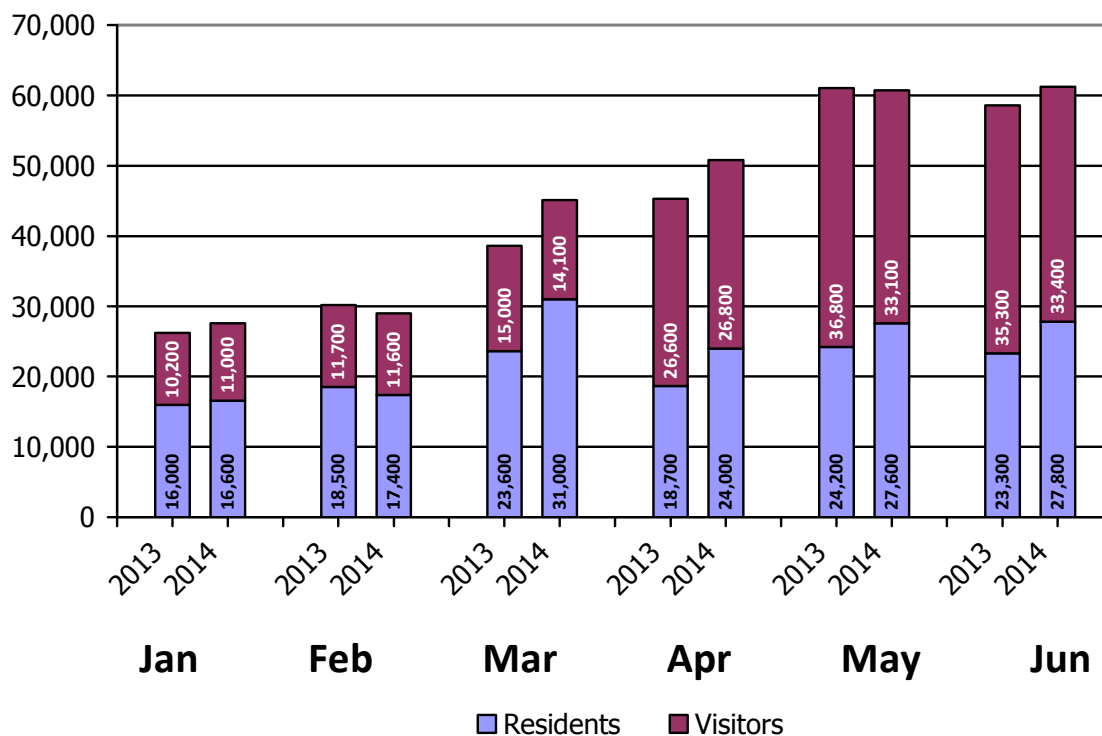
Visitor departures increased by 7.8% in January, and decreased by 1.4% in February and by 5.9% in March. Over Q2, visitor departures increased by 0.6% in April, but decreased by 10.0% in May and by 5.4% in June.

Visitor Country of Residence by Quarter 2014
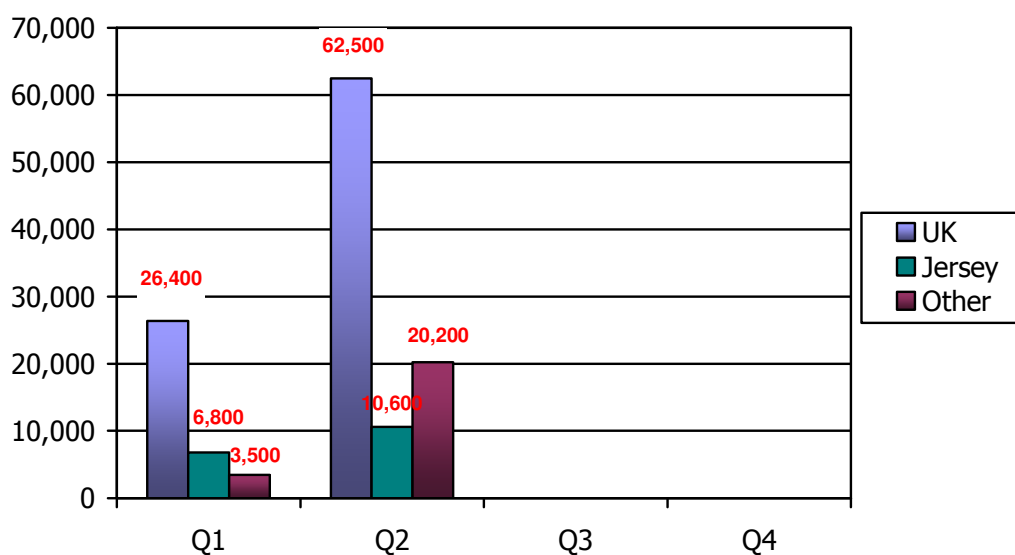
68.3% of visitors to Guernsey in Quarter 2 2014 were resident in the UK, with **13.4%** coming from Jersey and the remaining **18.3%** coming from other countries.

## Staying Visitors vs. Day Visits by Quarter 2014
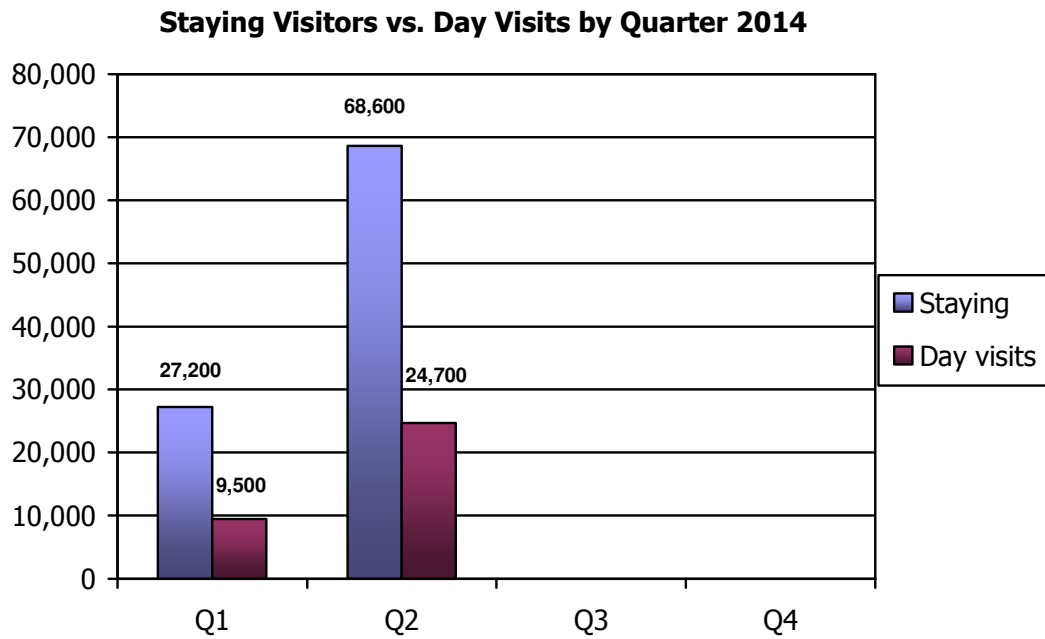
Compared to Quarter 2 2013, there has been a 6.5% decrease in visitors staying in Guernsey for at least 1 night, and a 2.6% decrease in day visits to Guernsey.

Cumulatively to the end of June, staying visitors have decreased by 4.7% compared to 2013, while day visits have decreased by 2.8%.
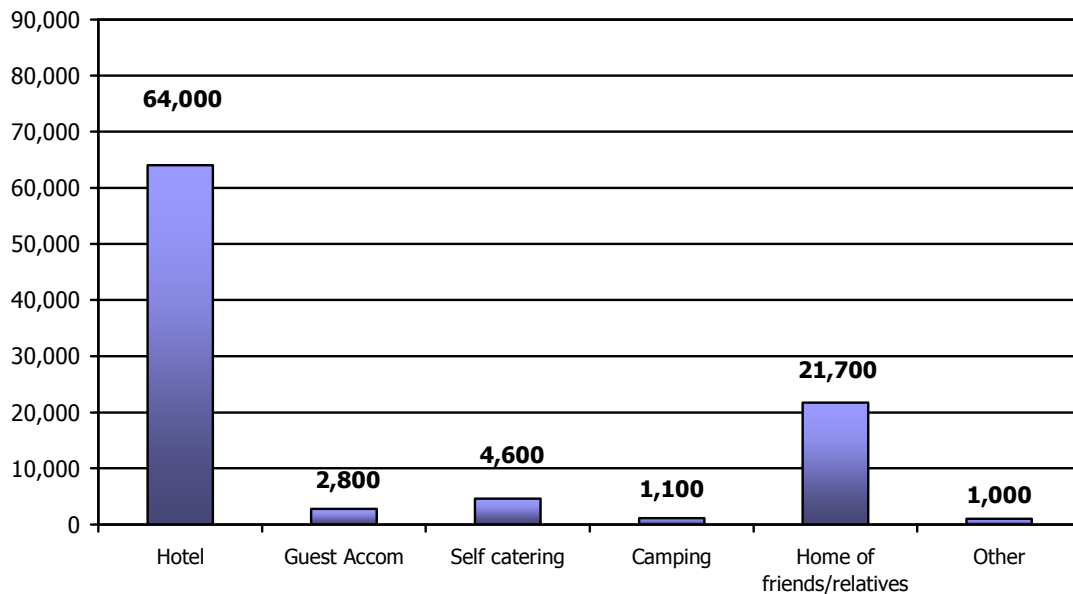
Accommodation used by Staying Visitors in Quarter 2 2014
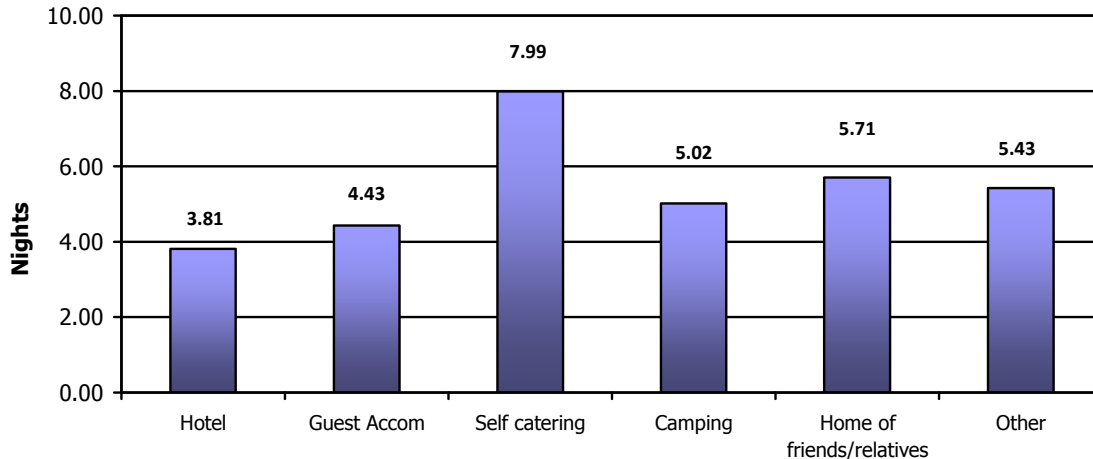
Volume of Visitors by Accommodation Type Q2 2014
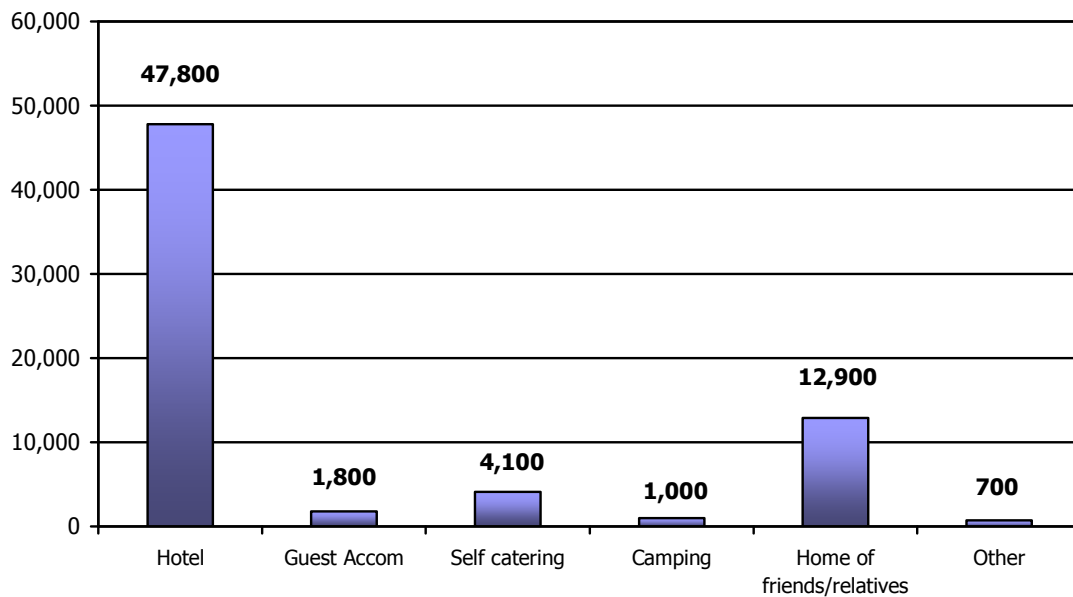
N.b. The above excludes long stay visitors (e.g. workers)

Visitors by Accommodation Type January to June 2014

N.b. The above excludes long stay visitors (e.g. workers)

**Average Length of Stay by Accommodation Type Q2 2014**

In total, there were **305,000** overnight stays in Guernsey in Quarter 2 2014 (-6.6%), with **227,400** bed nights sold in commercial accommodation (-5.8%).
The full breakdown was as follows:

Hotel bed nights:	181,800
Guest accommodation:	8,100
Self catering:	32,400
Camping:	5,100
Staying with friends/relatives:	73,500
Other	4,100

The overall average stay in Q2 for those spending at least a night in Guernsey was 4.47 nights, up very slightly from 4.46 nights in Q2 2013.

Average Length of Stay by Accommodation Type Jan-Jun 2014
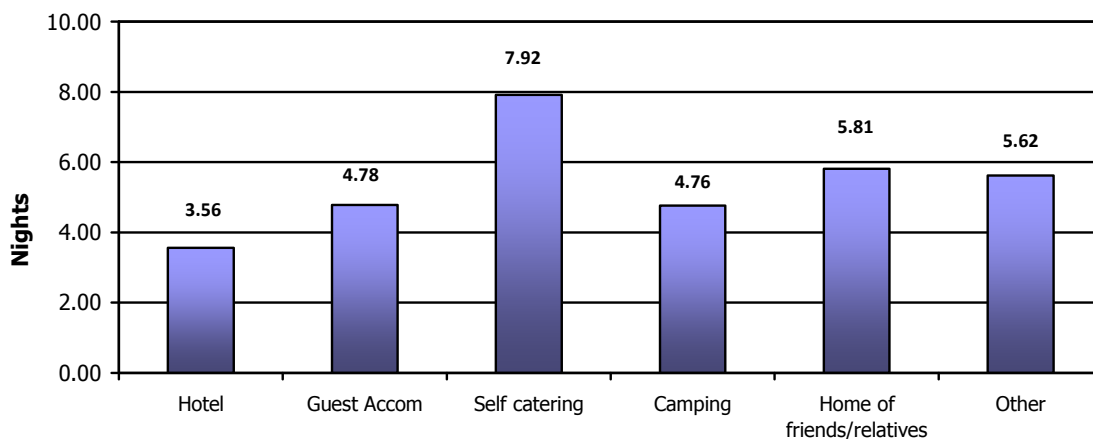

Over the first 6 months of 2014, there were **414,100** overnight stays in Guernsey (-4.4%), with 282,600 bed nights sold in commercial accommodation (-4.7%).
The full breakdown was as follows:

Hotel bed nights:	227,900
Guest accommodation:	13,200
Self catering:	36,200
Camping:	5,400
Staying with friends/relatives:	126,100
Other	5,500

Recommendation of Guernsey to friends or family

In March 2014, a new question was introduced to the survey asking departing visitors how likely, on a scale of 0 to 10, they would be to recommend Guernsey to friends or family.

Likelihood to promote Guernsey Q1 + Q2 2014
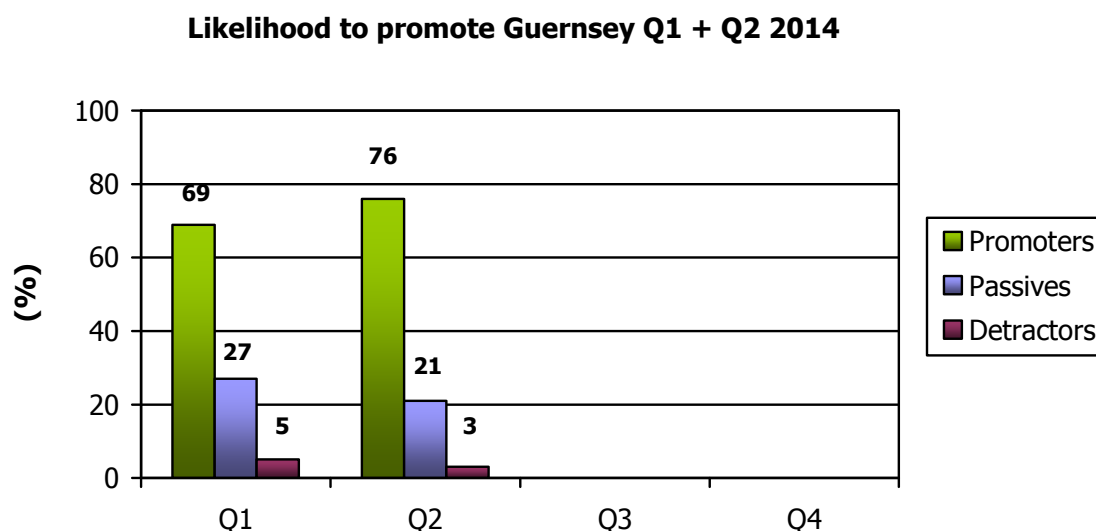
**"Promoters" gave a score of 9 or 10, "Passives" gave a score of 7 or 8 and "Detractors" gave a score of 0 to 6.
The Net Promoter Score is calculated by subtracting the proportion of detractors from the proportion of promoters.**

The overall average score in Q1 2014 was 7.47, with the Net Promoter Score being 63.8.

The overall average score in Q2 2014 was 8.32, with the Net Promoter Score being 73.1.

The overall average up to June 2014 was 8.16, with the Net Promoter Score being 71.5.

The Q2 results broken down by purpose of visit were as follows:

	Average Score	**Net Promoter Score**
Overall	**8.32**	**73.1**
Staying leisure visitors	8.30	80.7
Leisure day visitors	8.96	79.1
Staying VFR	8.71	81.9
Staying business visitors	7.93	57.7
Business day visitors	7.90	50.3

The year-to-date results broken down by purpose of visit were as follows:

	Average Score	**Net Promoter Score**
Overall	**8.16**	**71.5**
Staying leisure visitors	8.21	79.0
Leisure day visitors	8.70	79.0
Staying VFR	8.51	80.6
Staying business visitors	7.79	58.3
Business day visitors	7.81	50.0

Onward flights

In March 2014, a new question was introduced to the survey asking residents and departing visitors which airport or destination they were flying on to after the initial destination airport.

Over the period April to June 2014, **15,500** (14.5%) of the 107,200 departing air passengers were flying to an onward final destination.

10,400 (18.6%) of the 55,700 Guernsey residents travelling by air were flying to an onward destination and **5,100** (11.0%) of the 51,500 visitors to Guernsey departing by air were flying to an onward destination.

The breakdown by route was as follows:

	Visitor departures	Visitors travelling onward	Resident departures	Residents travelling onward
Gatwick	16,120	1,690	24,240	7,080
Southampton	11,010	1,280	13,360	1,530
Manchester	5,270	130	3,050	310
East Midlands	3,250	40	730	30
Birmingham	2,280	310	830	110
Bristol	1,870	40	1,570	60
Exeter	1,730	10	1,290	30
Stansted	1,640	100	940	130
Other UK Air	260	0	0	0
TOTAL UK AIR	**43,430**	**3,590**	**46,010**	**9,290**
Jersey air	7,170	1,490	9,310	1,080
Foreign air	880	40	380	0
TOTAL AIR	**51,470**	**5,120**	**55,700**	**10,370**

The main destinations/airports that passengers were travelling on to were as follows:

1. Scottish airports   1,250 passengers   (730 visitors)
2. Other English airports   1,150 passengers   (650 visitors)
3. Ireland   1,110 passengers   (370 visitors)
4. Spanish mainland   1,100 passengers   (80 visitors)
5. Switzerland   840 passengers   (360 visitors)
6. France   780 passengers   (330 visitors)
7. Canary Islands   770 passengers   (0 visitors)
8. Germany   720 passengers   (630 visitors)
9. USA   630 passengers   (180 visitors)
10. Italy   600 passengers   (40 visitors)
11. Netherlands   490 passengers   (290 visitors)
12. Northern Ireland   490 passengers   (260 visitors)
13. Turkey   470 passengers   (0 visitors)
14. Portugal (excl. Madeira) 450 passengers   (50 visitors)
15. Balearic Islands   380 passengers   (0 visitors)
16. Egypt   360 passengers   (0 visitors)
17. Latvia   280 passengers   (150 visitors)
18. Greece & Islands   260 passengers   (0 visitors)
19. Cyprus   220 passengers   (20 visitors)
20. Caribbean Islands   200 passengers   (0 visitors)

Cruise passengers

Guernsey Harbours collates information on the number of passengers on cruise ships visiting Guernsey. The graph below shows a summary of the total number of cruise passengers by quarter.

Cruise passengers by Quarter 2013 vs. 2014
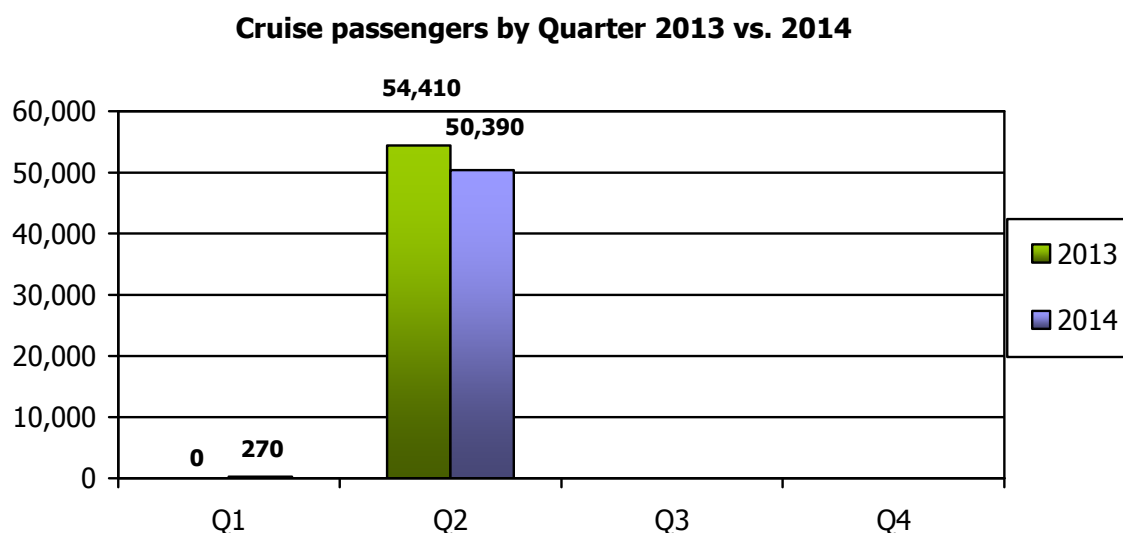
Over Q2, the number of cruise passenger arrivals has fallen by **7.4%** compared to Q2 2013 and the cumulative total to the end of June has fallen by **6.9%**. This is principally due to a large fall in cruise passengers in April of this year.

Over Q1 2014 there was one cruise ship arrival with 270 passengers in March. There were no cruise ship arrivals over Q1 2013.

In April 2014, there were 3 cruise ships with a total of 1,430 passengers compared to 6 cruise ships with a total of 11,320 passengers in 2013.

In May 2014, there were 24 cruise ships with a total of 26,810 passengers compared to 21 cruise ships with a total of 25,650 passengers in 2013.

In June 2014, there were 20 cruise ships with a total of 22,150 passengers compared to 10 cruise ships with a total of 17,440 passengers in 2013.

Appendices

Background and Aims

Guernsey has a detailed breakdown of passenger arrivals at the Airport and Harbours, but this data includes resident and visitor movements and does not break down visitors into any further detail. The only way to accurately measure total tourism volume is by undertaking a comprehensive exit survey in order to break down (or calibrate) passenger departure figures from the Airport and Guernsey's Harbours. This detailed information helps the Commerce & Employment Department, Guernsey Tourism, its marketing partners and other interested parties in allocating resources, planning and refining product development and marketing strategies, and acts as a benchmark to review future progress against marketing and strategic objectives.

Prior to 2010, the passenger exit survey was undertaken by a UK-based research company, which may have used a differing methodology and differing definitions to collate and calibrate the research data against passenger departures information. The 2010 fieldwork was undertaken by First Research, and the analysis (calibration) of the research data was undertaken by Island Ark. From February 2011 to the end of February 2013, Island Ark conducted both the ongoing fieldwork and the analysis. In March 2013, Guernsey's Commerce and Employment Department took on the responsibility for the fieldwork, while Island Ark has continued to provide advice on methodology and sampling, as well as the analysis.

One major difference in approach from previous surveys was that from 2010 the survey also covered departing passengers on the air and sea routes to Alderney, Sark and Herm. Passengers on these routes had not been previously included in visitor or resident movements. Therefore, for more direct comparisons with previous years' data, the passengers on these routes have been excluded from this quarterly analysis. It was also evident that the definition of holidaymakers and those visiting friends and relatives has differed between previous surveys (See 2014 definitions in the appendices).

The broad objectives of the 2014 Exit Survey are as follows:

➢ Determine the passenger composition of each of Guernsey's main air and sea transport routes across the whole of 2014
➢ Consolidate this information in order to calculate visitor volumes broken down into different visitor segments
➢ Provide information on visitor purpose of visit, country and UK region of residence
➢ Provide information on resident purpose of visit away from Guernsey
➢ Provide basic profiling information for residents and visitors (length of stay, party size, accommodation stayed in, first-time or repeat visitor)

As well as a full-year report, the passenger numbers need to be broken down by month, and a more detailed quarterly report is also produced. This is the second 2014 quarterly report on passenger departures between April and June (Q2 2014).

Methodology

As with previous exit surveys, face-to-face interviews are being conducted with departing passengers throughout 2014, with interview shifts planned to reflect passenger throughput and to cover all routes, all days of the week and all times of the day.

It is very difficult to achieve a completely randomised approach when predetermining interview shifts, but the Passenger Calibration Survey uses a random sampling methodology as far as possible. Interview shifts are planned to broadly represent passenger movements throughout the year, but the selection of respondents within those shifts is random, with departing passengers being interviewed immediately after checking in at the Airport and Harbours, with the next passing person/car being selected for inclusion as soon as the

previous interview has finished. This provides a randomised approach to interviewee selection, while ensuring that interviewer time is used as productively as possible.

Interview shifts are undertaken at the Airport and the Harbour passenger and car terminals. In 2011 and 2012, interview shifts were also undertaken at the inter-Island harbour departure points to cover the sailings to Sark and Herm, but this was discontinued in 2013.

The questionnaire is asked to one respondent within each travelling party, who responds on behalf of that party.

Interviewers with French and German language skills are allocated as far as possible to appropriate shifts where language skills are helpful.

Interview shifts

The questionnaire is relatively short, with the aim of maximising the coverage for this survey so that adequate sample sizes are achieved on each of Guernsey's main transport routes in order to break down the passenger numbers on those routes.

Between April and June 2014, **366 interviewer hours** were allocated to this Passenger Calibration Survey. The exact shift schedules were flexible in order to account for 2014 transport schedules, any new routes, changes to schedules, and cancellations or delays. Although interview shifts are planned in advance, travel movements and weather conditions are continuously monitored and shifts have been altered as necessary.

Excluding the inter-Bailiwick routes, data for Q2 therefore comes from **8,180 interviews, representing 16,230 departing passengers (9.4% of Guernsey's total departing passengers, excluding the Alderney, Sark and Herm routes, over Q2 2014)** - making this a very comprehensive survey of departing passengers from Guernsey. Levels of statistical reliability for any individual route vary depending upon the sample sizes achieved for that route, but the cumulative sample size covering over 8,000 passengers provides a strong degree of statistical confidence in the results for Q2 2014. As sample sizes increase on some of the smaller routes, the cumulative data will become increasingly strengthened as the survey progresses and some of the data for earlier quarters will be updated.

The detailed interview shifts were planned in advance, but there was flexibility in the schedules as detailed above. Interview shifts were planned to take account of the following:

- Passenger throughput by month.
- Passenger throughput at the various sampling points (Airport, Harbour Passenger and Car Terminals)
- Sark and Herm ferries were not covered in this quarter
- Representative coverage of weekdays and weekends as the profile of passengers differs by day of week.
- Representative coverage of passenger movements by time of day (e.g. the profile of passengers leaving Guernsey early in the morning is different to the profile of passengers departing at the end of the day).

Statistical Reliability and Bias

Sample surveys are always subject to statistical error and the higher the sample size, the lower the margin of statistical variation. The table below gives an indication of the levels of statistical error to which the data are theoretically subject at the 95% Confidence Level.

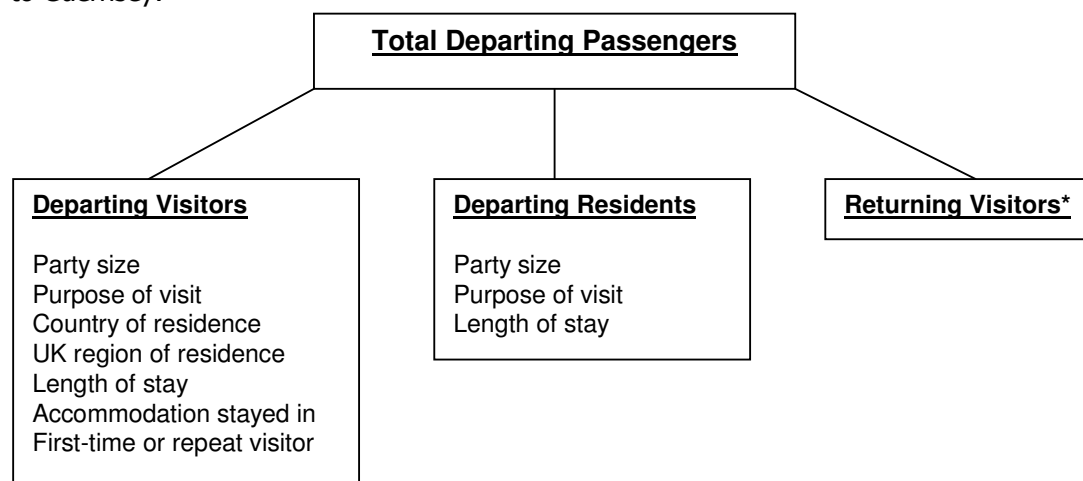|	Research Results				
Sample Size	10% or 90%	20% or 80%	30% or 70%	40% or 60%	50%
8,200	+/- 0.7	+/- 0.9	+/- 1.0	+/- 1.1	+/- 1.1
4,400	+/- 0.9	+/- 1.2	+/- 1.4	+/- 1.5	+/- 1.5
1,000	+/- 1.9	+/- 2.5	+/- 2.8	+/- 3.0	+/- 3.1
500	+/- 2.6	+/- 3.5	+/- 4.0	+/- 4.3	+/- 4.4

Based upon a total sample size from Q2 of 8,200, a finding that 53.9% of respondents were departing visitors would mean that the true figure for all respondents is 95% likely to be within the range 52.8% to 55.0%, but is more likely to be near the centre of this range (i.e. closer to the survey sample finding). For departing visitors, based upon a sub-sample size of 4,400, the finding that 47.2% were staying leisure visitors would have a statistical variation of between 45.7% and 48.7%. As the sample sizes become smaller for individual routes, purposes of visit and nationalities, the statistical variability of the results increases.

With any survey methodology, bias is likely to enter into the sample. This bias is minimised by achieving high response rates and allocating a random manner for approaching interviewees. By undertaking interview shifts over a range of times and days, bias is minimised as much as possible in this survey, but may be affected by certain respondents having more time available to be interviewed. The 'interviewee refusal rate' was recorded by interviewers to provide an idea of the potential level of bias caused by interviewee self-selection and was just 8.4% in Q2 2014. This refusal rate compares very favourably with other similar surveys.

Survey outputs

The primary aim of the survey is to determine the breakdown of passengers on each route in order to determine the overall number of visitors to Guernsey by purpose of visit and country of residence. Some additional profiling questions are asked of visitors, and residents are also asked their purpose of visit and length of stay away from Guernsey.

The breakdown of passenger arrivals provides the following information for every major route to Guernsey:

Total Departing Passengers

Departing Visitors

Party size
Purpose of visit
Country of residence
UK region of residence
Length of stay
Accommodation stayed in
First-time or repeat visitor

Departing Residents

Party size
Purpose of visit
Length of stay

Returning Visitors*

*Returning visitors are those who are counted twice in passenger numbers because they visit elsewhere during their stay in Guernsey (e.g. visitor day trips to Sark, Herm or Jersey).

The above breakdown of passengers will be provided for each major transport route to Guernsey in 2014, and is grossed up to show total air and total sea passenger breakdowns.

As sample sizes for some of the smaller transport routes are not large enough on a monthly or seasonal basis, the profile of passengers across the whole period of the survey is applied. Also, some of the smaller transport routes are combined into groupings.

2014 Passenger Departures Including Alderney, Sark and Herm Departures

Cumulative Passenger Departures by Route January – June 2014 (including Alderney, Sark and Herm):

	Volume	% of total pax.	2014 vs. 2013
London Gatwick	74,350	23.3%	-7.9%
Southampton	40,200	12.6%	33.2%
Manchester	13,900	4.4%	-4.0%
Birmingham	5,400	1.7%	4.0%
Exeter	5,300	1.7%	-0.5%
Bristol	5,300	1.7%	-2.0%
East Midlands	5,500	1.7%	-12.4%
Stansted	3,800	1.2%	-5.0%
Other UK Air	350	0.1%	-32.7%
Total UK Air	**154,200**	**48.4%**	**1.3%**
Jersey	32,900	10.3%	-4.2%
Alderney	8,500	2.7%	3.2%
Total CI Air	**41,400**	**13.0%**	**-2.8%**
Dinard	840	0.3%	-24.4%
Swiss Air	60	*	16.0%
Other Foreign Air	1,200	0.4%	-15.0%
Total Foreign Air	**2,100**	**0.7%**	**-18.5%**
Total Air:	**197,700**	**62.0%**	**0.1%**
UK Sea	35,300	11.1%	15.8%
Jersey	23,300	7.3%	0.5%
Herm	27,550	8.6%	9.2%
Sark	17,900	5.6%	0.7%
St. Malo	15,000	4.7%	2.0%
Other French Sea	2,100	0.6%	-33.9%
Total Sea:	**121,100**	**38.0%**	**5.6%**
Total Departures:	**318,800**		**2.1%**

2014 Definitions

Island Ark has used the purpose of visit definitions as declared by the visitor, irrespective of where they stayed:

If they declare their main purpose of visit as "Leisure/Holiday", but say that they are staying with friends or relatives, their purpose remains as "Staying leisure/holiday".

If they declare their main purpose of visit as "Seeing friends/family", but say that they are staying in commercial accommodation, their purpose remains as "Staying VFR".

Prior to 2012, those stating that they were in transit and had not stayed in Guernsey were classified as "Leisure Daytrippers". From 2012 these have been reclassified as "Other Day Visits". "Other" purposes of visit would include those visiting Guernsey for other purposes that would not be considered as either leisure or business such as funerals, weddings, other family gatherings, deliveries, medical reasons, job interviews, study visits/school trips etc.

Fieldwork, Interviewers and Quality Control Standards

As a full member and company partner of the Market Research Society, Island Ark is required to provide best quality practice in all projects undertaken and to adhere to the guidelines set out by the **Market Research Society Code of Conduct** and the **Interviewer Quality Control Scheme.**

All interviewers employed directly by Island Ark receive the necessary training in order to put across a professional and friendly image to departing passengers, whilst still achieving the required number of interviews using the sampling manner determined.

All interviewers are issued with a current copy of the Market Research Society Code of Conduct, printed interviewer instructions and identity cards.

Interview shifts are periodically checked to ensure that the interviewers are present and are undertaking their interviews in the manner specified.

Data Preparation & Processing

All returned questionnaires are hand-edited and coded in-house by Island Ark before data entry. Data entry screens, with controls over incorrect data entry have been set up by Island Ark, and data inputting is sub-contracted to Jersey Input Direct Ltd. Island Ark undertakes a final data cleaning process prior to analysis.

It is vitally important in this survey that when grossing up sample survey results by large passenger volumes that the sample data inputted is accurate and realistic. Computer checks are run to verify data validity, and a minimum of 10% of the inputted questionnaires are manually checked for correct data entry. With knowledge of the tourism and transport industries, as well as previous experience of analysing data from such exit surveys, it is ensured that any "outlying" data is manually checked back to the questionnaire and, if appropriate, excluded from the sample where it could have a major impact on the grossed up results.

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