

# **2015 Travel Survey**

**for the States of Guernsey Commerce & Employment  
Department**

## **RESEARCH REPORT ON Q1 2015**

**April 28<sup>th</sup> 2015**



## **Table of Contents**

	<b>Page No.</b>
<b>Summary of Results</b>	<b>1</b>
<b>Survey Results</b>	<b>2</b>
Breakdown of departing passengers	2
Visitor vs. resident departures 2015 vs. 2014	3
Visitors by air and sea 2015 vs. 2014	4
Visitor and resident departures by month 2015 vs. 2014	4
Purpose of visit by travel method 2015 vs. 2014	5
Visitors by country of residence	6
Staying visitors vs. day visits	6
Accommodation used by staying visitors	7
Average length of stay and bed nights by accommodation type	7
Recommendation of Guernsey	8
Onward flights	9
Cruise passengers	10
Visiting pleasure craft	10
<b>Appendices</b>	<b>11</b>
Background and Aims	11
Methodology	11
Interview shifts and achieved sample size	12
Statistical reliability and bias	12
Survey outputs	13
Total passenger departures 2015 vs. 2014	14
Definitions	15
Fieldwork, interviewers & quality control	15
Data preparation & processing	15

## Summary of Results for Q1

	<b>2014</b>	<b>2015</b>	<b>% change</b>
<b>Total departing passengers</b>	<b>91,800</b>	<b>96,700</b>	<b>+5.3%</b>
Total departing visitors	36,700	36,700	0.0%
Departing visitors by air	32,200	30,700	-4.5%
Departing visitors by sea	4,550	6,000	+31.7%
Staying leisure visitors	9,000	9,800	+8.4%
Visiting friends and relatives	9,000	11,400	+26.6%
Staying business / conference	8,800	7,500	-14.5%
Leisure day visits	2,300	1,200	-48.0%
Business day visits	6,200	4,900	-20.8%
<b>Total for the above purposes of visit *</b>	<b>35,300</b>	<b>34,800</b>	<b>-1.5%</b>
Total staying visitors	27,200	29,150	+7.3%
Average length of stay**	4.07 nights	4.09 nights	+0.4%
Total overnight stays (bed nights) **	109,200	118,500	+8.5%
Total staying in commercial accommodation	17,800	18,800	+6.0%
Average stay in commercial accommodation	3.10 nights	3.07 nights	-0.9%
Bed nights in commercial accommodation	55,200	57,900	+5.0%
Day visits	9,550	7,550	-20.9%
UK visitors	26,400	28,500	+8.1%
Jersey visitors	6,800	4,550	-32.9%
Other nationalities	3,500	3,600	+2.2%
Cruise ship passengers ***	268	342	+27.6%
Visiting yachtsmen ***	277	187	-32.5%
Departing Guernsey residents	55,000	59,700	+8.6%
Departing residents by air	49,400	53,200	+7.6%
Departing residents by sea	5,500	6,500	+17.3%
Net Promoter Score ****	64%	53%	

**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.**

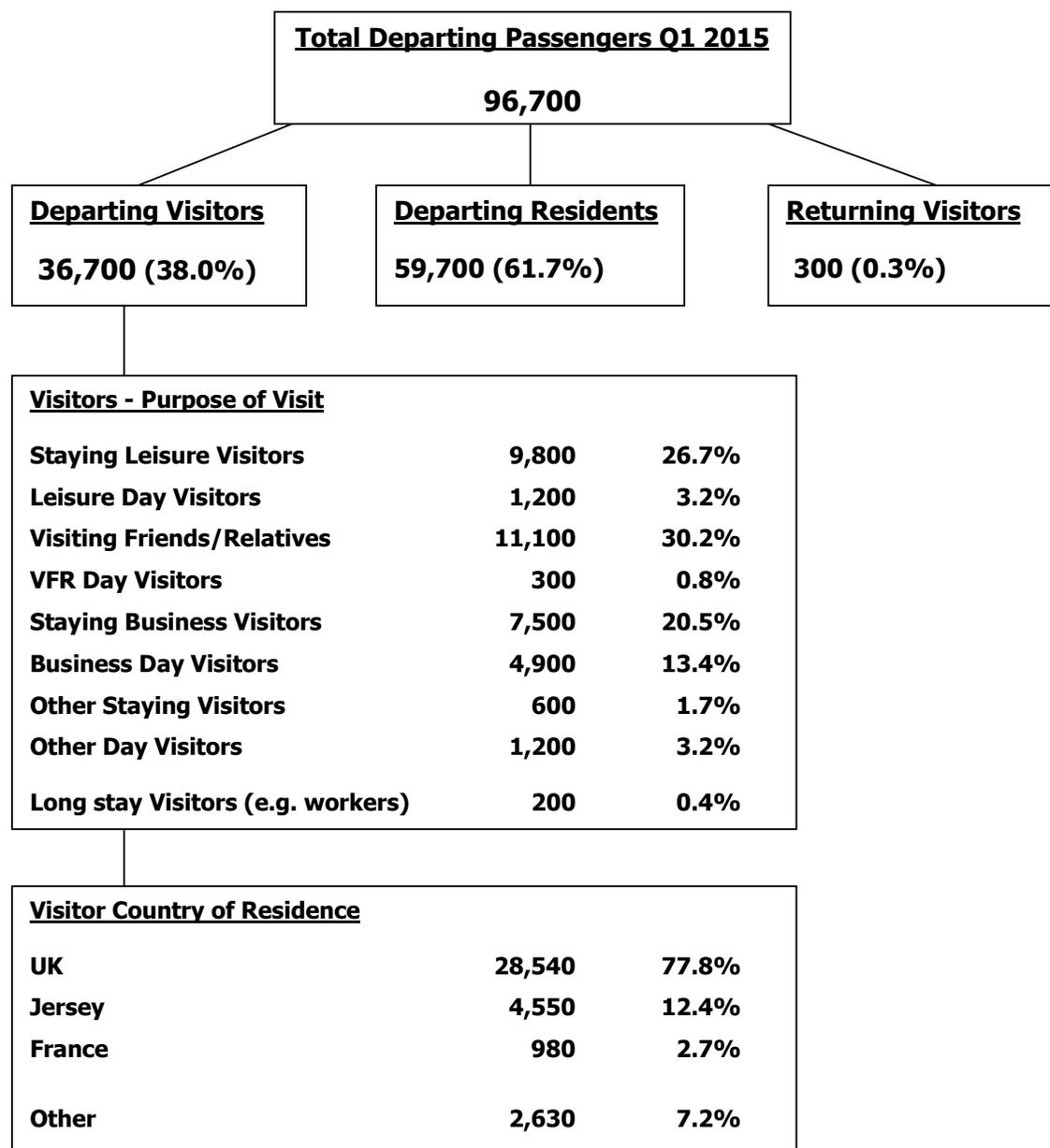
**\*\* Excludes "Long stay" visitors.**

**\*\*\* Cruise passengers and visiting yachtsmen 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.**

**\*\*\*\* The question was introduced in March 2014, so January and February is missing from Q1 2014. Results over Q1 are therefore not directly comparable.**

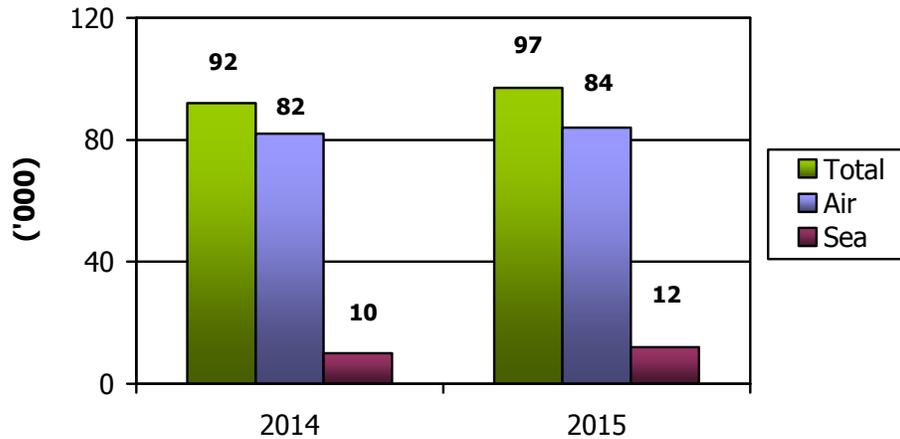
## Q1 Survey Results – Excluding Alderney, Sark and Herm Departures

Excluding the Alderney, Sark and Herm routes, the passenger numbers for the **first quarter** of 2015 were broken down as follows:



## Comparisons with 2014

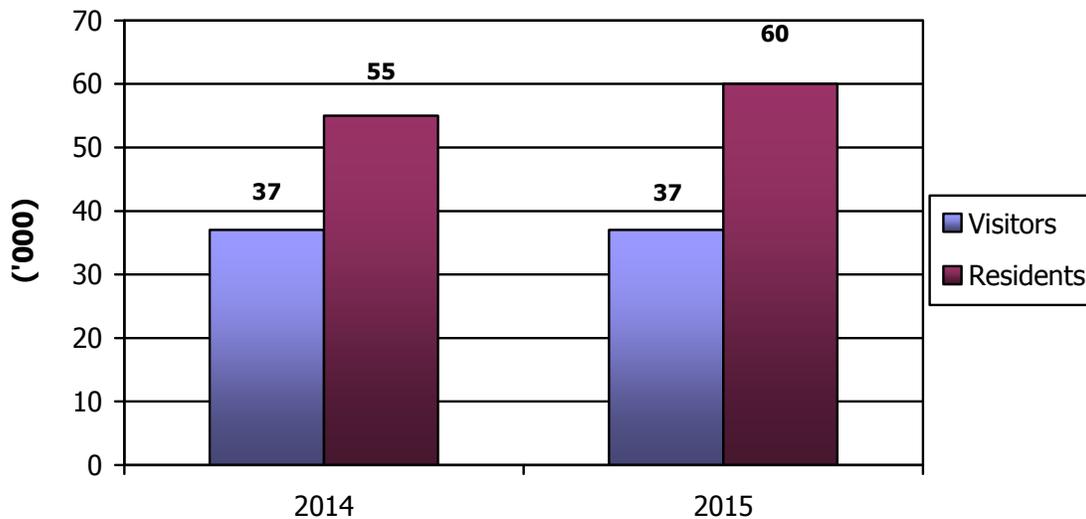
### Passenger Departures Q1 2014 and 2015



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

Compared to Quarter 1 2014, there has been a 5.3% increase in passenger departures from Guernsey, with a 3.1% increase in passenger departures by air and a 23.8% increase in passenger departures by sea.

### Visitors vs. Residents Q1 2014 and 2015



Excluding travel from within the Bailiwick, there were **36,700 visitor departures** between January and March 2015 and **59,700 resident departures**.

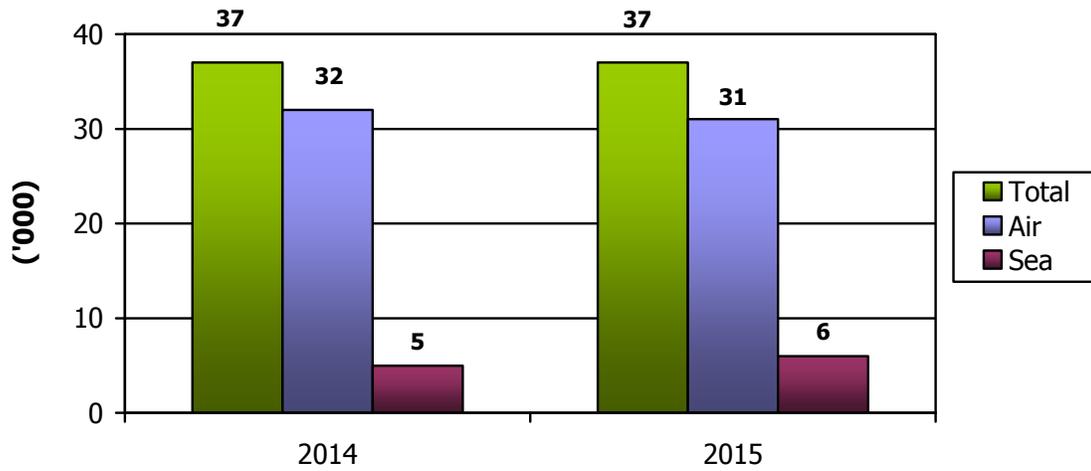
Visitor departures have **remained at the same level** as Quarter 1 2014.

Excluding "returning visitors", 38.1% of departing passengers in Quarter 1 2015 were visitors to Guernsey, compared to 40.0% over the same period in 2014.

For air passengers, 30,700 (36.5%) were departing visitors and 53,200 were departing residents.

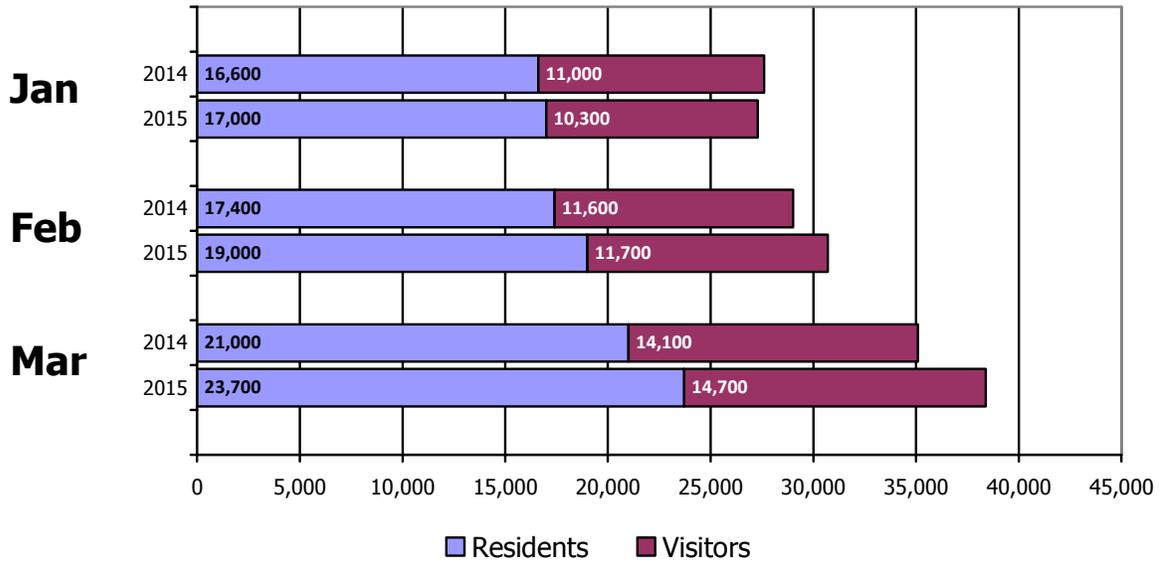
For sea passengers, 6,000 (48.0%) were departing visitors and 6,500 were departing residents.

### Visitor Volumes by Travel Method Q1 2014 and 2015



Compared to Quarter 1 2014, there has been a 4.5% decrease in visitors to Guernsey by air and a 31.7% increase in visitors by sea.

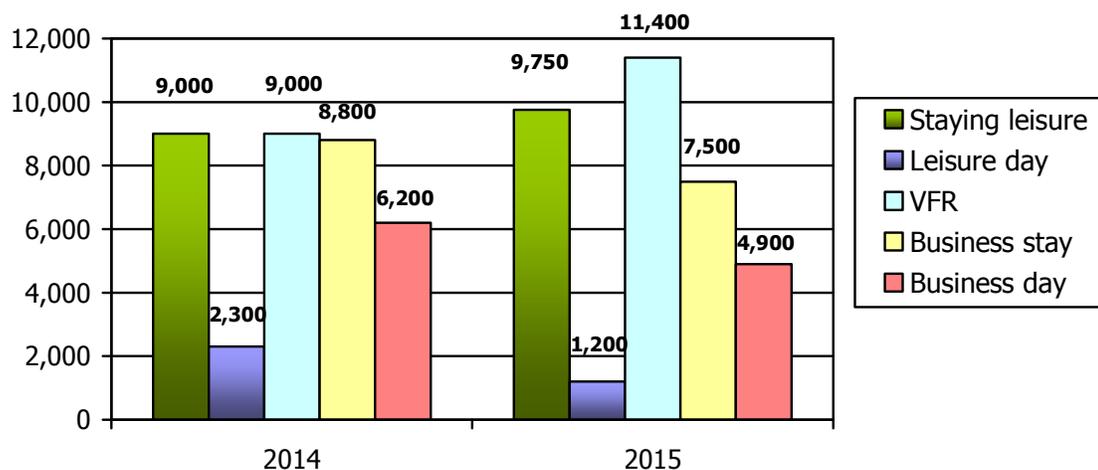
### Visitor and Resident Departures by Month 2014 and 2015



Visitor departures decreased by 6.6% in January, and increased by 1.3% in February, and by 4.0% in March.

## Visitors by Purpose of Visit and Travel Method

Visitor Volumes by Visit Purpose Q1 2014 and 2015

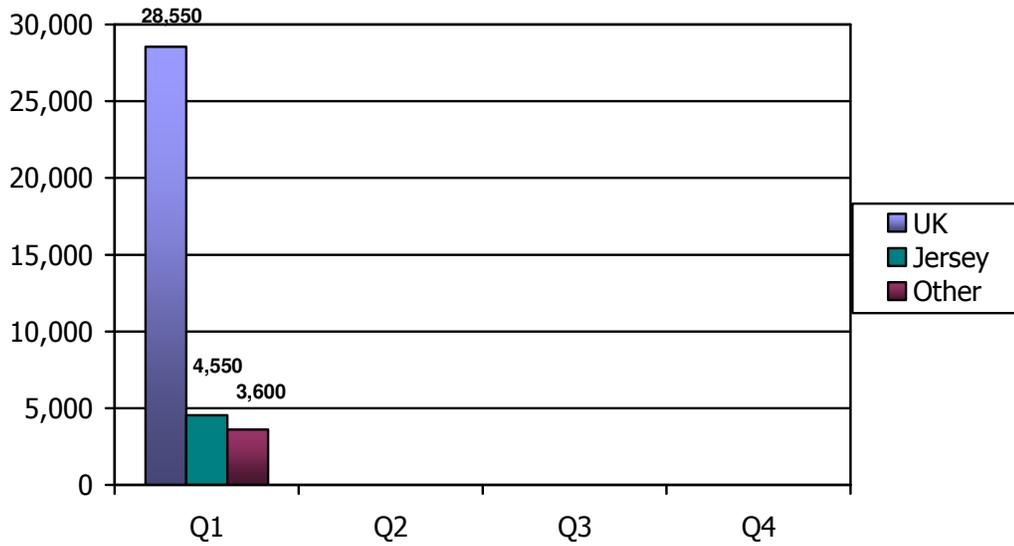


Compared to Quarter 1 2014, there has been an 8.4% increase in staying leisure visitors to Guernsey and a 26.6% increase in those visiting friends and relatives. Staying business/conference visitors have fallen by 14.5%, leisure day visits have fallen by 48.0% and business day visits have fallen by 20.8%.

### Breakdown by air and sea:

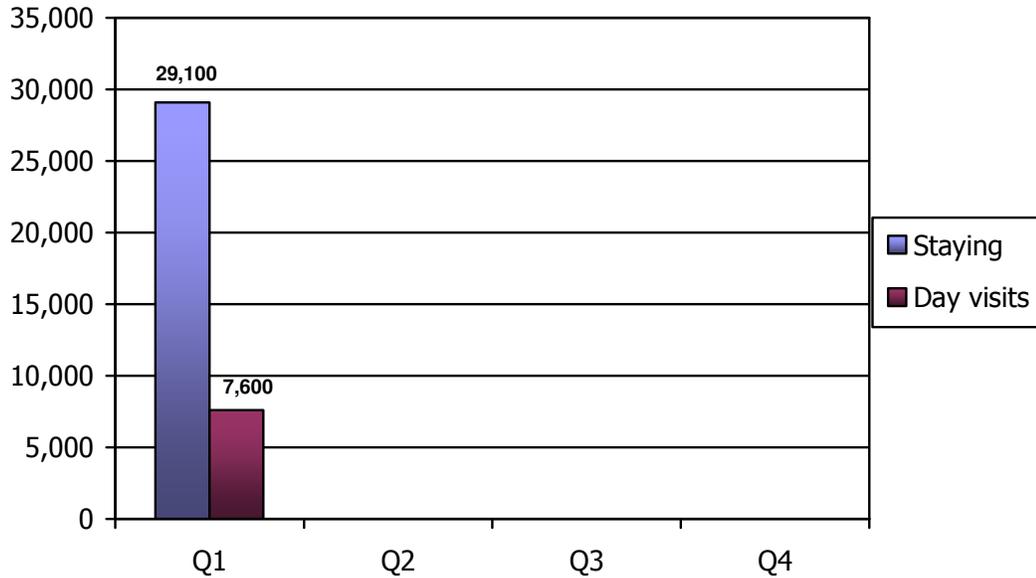
	<u>Air</u>			<u>Sea</u>		
	2014	2015	% change	2014	2015	% change
Staying Leisure Visitors	7,120	7,740	8.7%	1,890	2,020	6.9%
Leisure Day visits	1,700	290	-82.9%	570	890	56.1%
Staying VFR	8,110	9,510	17.3%	760	1,560	105.3%
VFR Day visits	90	150	66.7%	30	130	333.3%
Staying Business	7,960	6,500	-18.3%	860	1,040	20.9%
Business Day visits	6,090	4,790	-21.3%	110	130	18.2%

### Visitor Country of Residence by Quarter 2015



**77.8%** of visitors to Guernsey in Quarter 1 2015 were resident in the UK (+8.1%), with 12.4% coming from Jersey (-32.9%) and the remaining 9.8% coming from other countries (+2.2%).

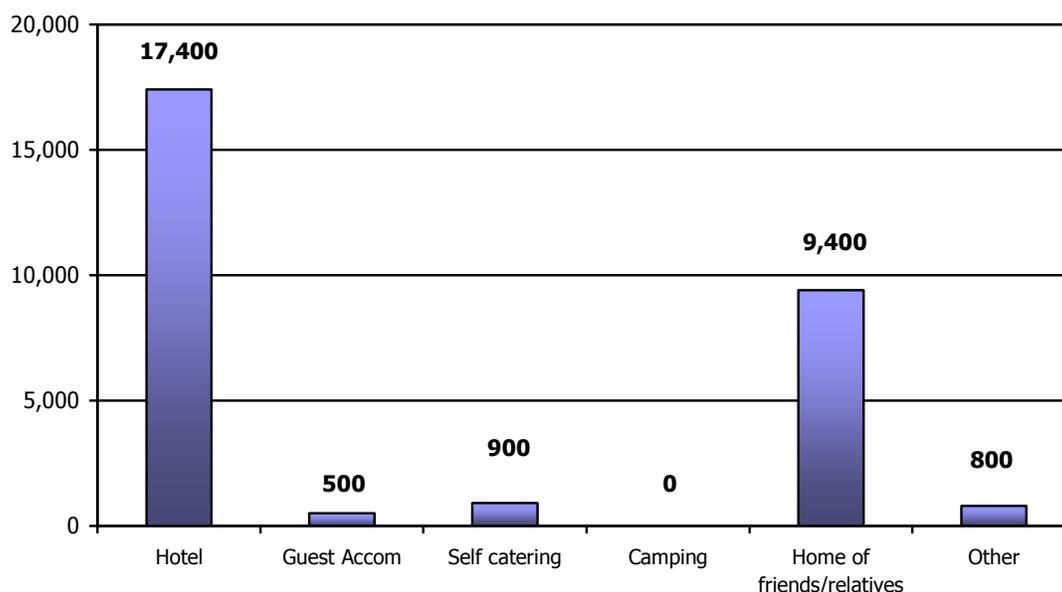
### Staying Visitors vs. Day Visits by Quarter 2015



Compared to Quarter 1 2014, there has been a 7.3% increase in visitors staying in Guernsey for at least 1 night, and a 20.9% decrease in day visits to Guernsey. The number of staying leisure visitors has increased by 8.4% compared to Q1 2014.

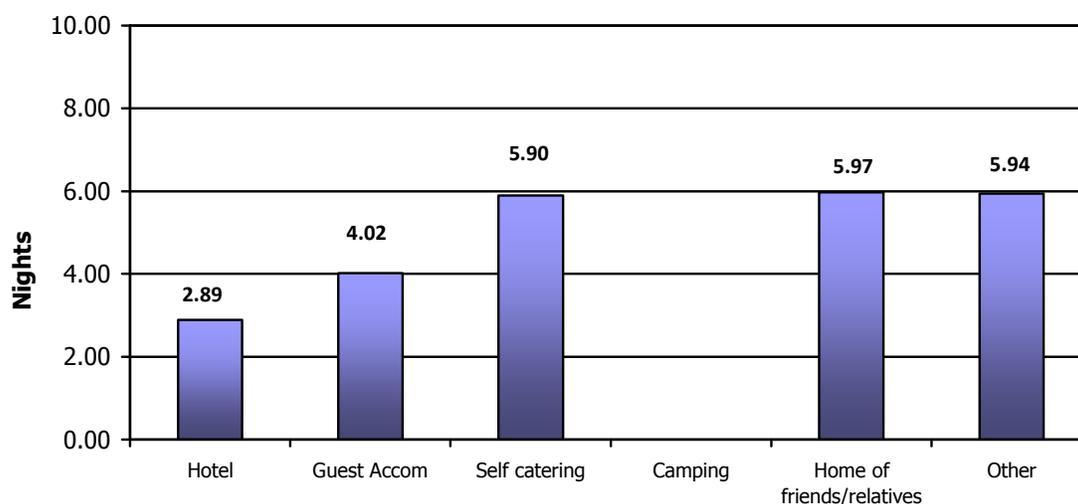
## Accommodation used by Staying Visitors in Quarter 1 2015

### Volume of Visitors by Accommodation Type Q1 2015



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

### Average Length of Stay by Accommodation Type Q1 2015



In total, there were **118,500** overnight stays in Guernsey in Quarter 1 2015 (+8.5%), with **57,900** bed nights sold in commercial accommodation (+5.0%).

The full breakdown was as follows:

Hotel bed nights:	50,200
Guest accommodation:	2,200
Self catering:	5,600
Camping:	0

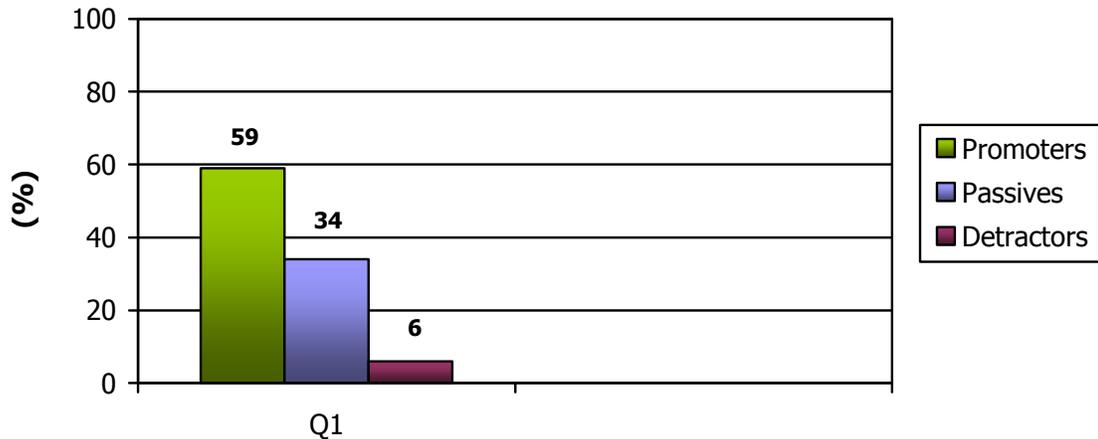
Staying with friends/relatives:	56,000
Other	4,500

The overall average stay in Q1 for those spending at least a night in Guernsey was 4.09 nights, up from 4.07 nights in Q1 2014.

## 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 2015



"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 2015 was 8.74, with the Net Promoter Score being 53.2. This compares with an average score in Q1 2014\* of 8.96 and a NPS of 63.8.

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

	<b>Average Score</b>	<b>Net Promoter Score</b>
<b>Overall</b>	<b>8.74</b>	<b>53.2</b>
Staying leisure visitors	8.86	58.0
Leisure day visitors	8.67	53.1
Staying VFR	9.14	68.5
Staying business visitors	8.55	45.9
Business day visitors	8.37	38.4

\* N.b. The 2014 NPS only includes questionnaires from March.

## 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 January to March 2015, **17,090** (20.4%) of the 83,910 departing air passengers were flying to an onward final destination.

**14,180** (26.7%) of the 53,190 Guernsey residents travelling by air were flying to an onward destination and **2,910** (9.5%) of the 30,720 visitors to Guernsey departing by air were flying to an onward destination.

The breakdown by route was as follows:

	<b><u>Visitor departures</u></b>	<b><u>Visitors travelling onward</u></b>	<b><u>Resident departures</u></b>	<b><u>Residents travelling onward</u></b>
Gatwick	9,650	1,340	23,730	11,120
Southampton	7,540	430	7,970	660
Manchester	2,020	50	3,570	370
East Midlands	900	0	940	20
Birmingham	1,080	190	1,610	310
Bristol	790	0	990	30
Exeter	1,310	30	1,340	110
Stansted	590	60	970	300
London City	1,030	80	1,500	90
Other UK Air	60	0	10	0
<b>TOTAL UK AIR</b>	<b>24,970</b>	<b>2,180</b>	<b>42,630</b>	<b>13,010</b>
Jersey air	5,590	730	10,030	1,170
Foreign air	160	0	540	0
<b>TOTAL AIR</b>	<b>30,720</b>	<b>2,910</b>	<b>53,190</b>	<b>14,180</b>

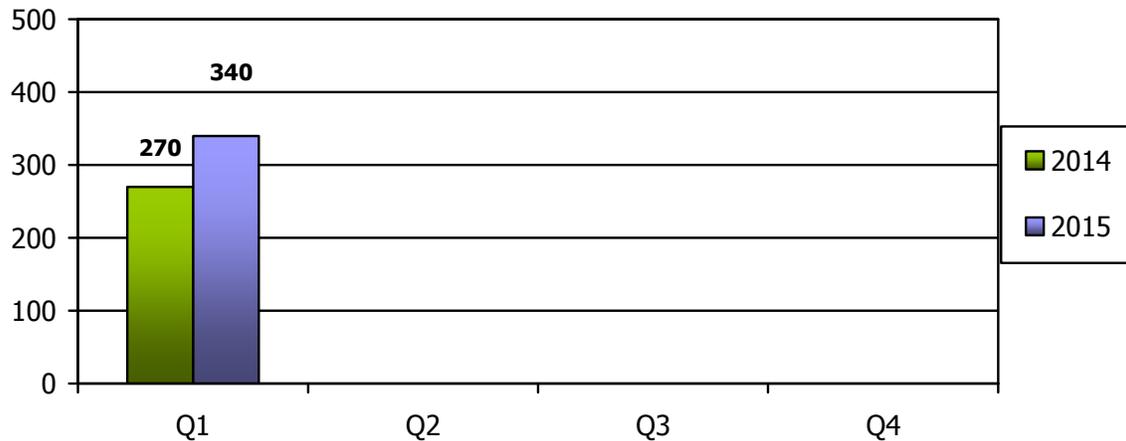
The main destinations/airports that passengers were travelling on to in Q1 were as follows:

1. Switzerland	1,380 passengers	(210 visitors)
2. USA	990 passengers	(60 visitors)
3. English airports	930 passengers	(680 visitors)
4. Scottish airports	930 passengers	(330 visitors)
5. Caribbean	910 passengers	(0 visitors)
6. Canary Islands	900 passengers	(10 visitors)
7. Spanish mainland	830 passengers	(100 visitors)
8. Netherlands	770 passengers	(120 visitors)
9. Austria	590 passengers	(30 visitors)
10. France	590 passengers	(70 visitors)
11. Italy	570 passengers	(60 visitors)
12. South Africa	530 passengers	(60 visitors)
13. Australia	530 passengers	(80 visitors)
14. Egypt	440 passengers	(10 visitors)
15. Germany	420 passengers	(100 visitors)
16. Madeira	380 passengers	(50 visitors)
17. Dubai	350 passengers	(0 visitors)
18. Northern Ireland	330 passengers	(230 visitors)
19. Portugal mainland	300 passengers	(60 visitors)
20. Ireland	280 passengers	(90 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 2014 vs. 2015**



Over Q1 2015, the number of cruise passenger arrivals was **340 (+27.6%)** compared to 270 in Q1 2014.

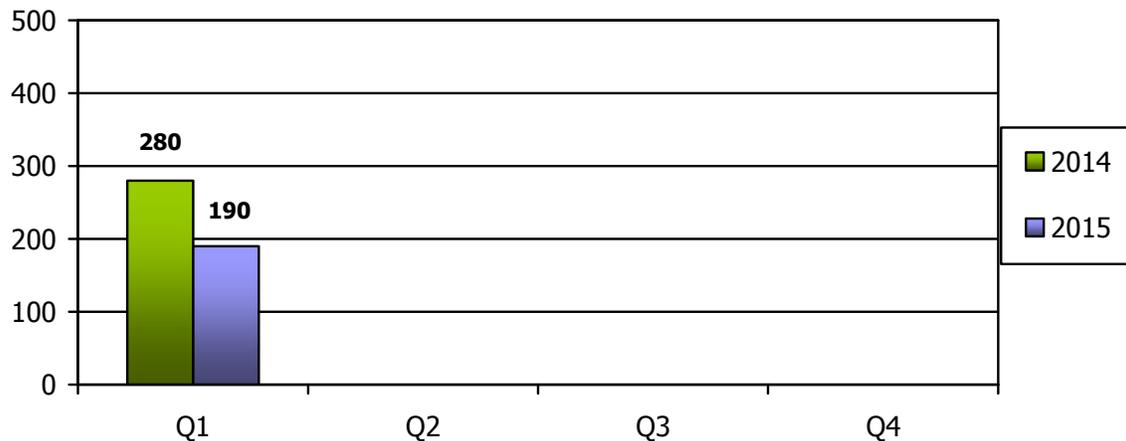
A new question was added to the survey in November 2014 asking visitors who had visited Guernsey previously whether they had ever visited before on a cruise.

From the 1,504 respondents who answered this question over the first 3 months of 2015, **only 1** said that they had previously visited Guernsey on a cruise.

## Passengers on pleasure craft (visiting yachts)

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

**Cruise passengers by Quarter 2014 vs. 2015**



Over Q1 2015, the number of pleasure passenger arrivals was **190 (-32.5%)** compared to 280 in Q1 2014.

## **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 2015 definitions in the appendices).

The broad objectives of the 2015 Exit Survey are as follows:

- Determine the passenger composition of each of Guernsey's main air and sea transport routes across the whole of 2015
- 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 first 2015 quarterly report on passenger departures between January and March (Q1 2015).

### **Methodology**

As with previous exit surveys, face-to-face interviews are being conducted with departing passengers throughout 2015, 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 in 2015 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 January and March 2015, **279 interviewer hours** were allocated to this Passenger Calibration Survey. The exact shift schedules were flexible in order to account for 2015 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 Q1 therefore comes from **4,586 interviews, representing 7,972 departing passengers (8.0% of Guernsey's total departing passengers, excluding the Sark and Herm sea routes, over Q1 2015)** - 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 nearly 8,000 passengers provides a strong degree of statistical confidence in the results for Q1 2015. 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%
4,600	+/- 0.9	+/- 1.2	+/- 1.3	+/- 1.4	+/- 1.4
1,800	+/- 1.4	+/- 1.8	+/- 2.1	+/- 2.3	+/- 2.3
1,000	+/- 1.9	+/- 2.5	+/- 2.8	+/- 3.0	+/- 3.1
500	+/- 2.6	+/- 3.5	+/- 4.0	+/- 4.3	+/- 4.4

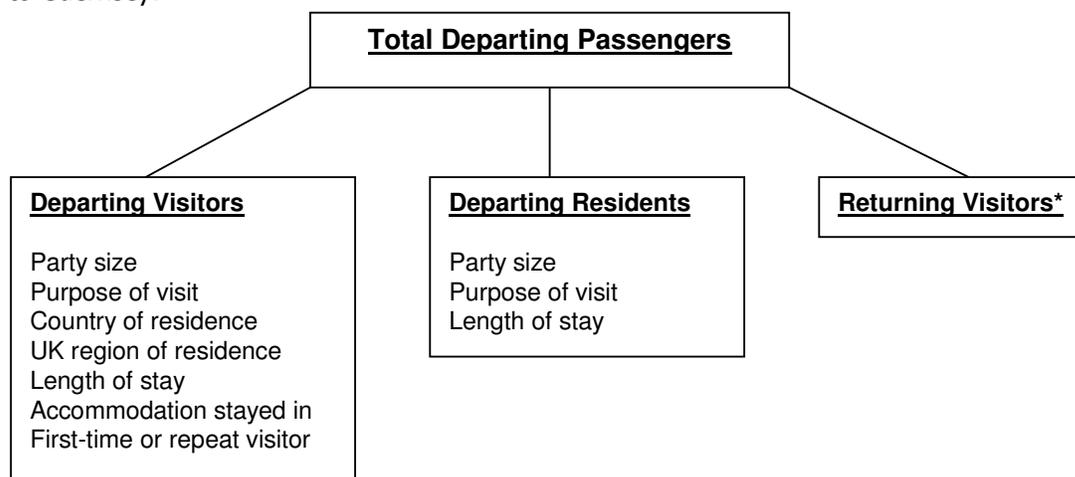
Based upon a total sample size from Q1 of 4,600, a finding that 38% of respondents were departing visitors would mean that the true figure for all respondents is 95% likely to be within the range 36.6% to 39.4%, but is more likely to be near the centre of this range (i.e. closer to the survey sample finding). For departing visitors, based upon a sub-sample size of 1,800, the finding that 26.7% were staying leisure visitors would have a statistical variation of between 24.0% and 29.4%. 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 **13.7%** in Q1 2015. 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:



**\*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 2015, 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.

## 2015 Passenger Departures Including Alderney, Sark and Herm Departures

Cumulative Passenger Departures by Route January – March 2015 (including Alderney, Sark and Herm):

	<b><u>Volume</u></b>	<b><u>% of total pax.</u></b>	<b><u>2015 vs. 2014</u></b>
London Gatwick	33,460	32.6%	-1.1%
Southampton	15,530	15.1%	-1.9%
Manchester	5,640	5.5%	2.0%
Birmingham	2,710	2.6%	16.7%
Exeter	2,670	2.6%	15.4%
London City	2,560	2.5%	n/a
Bristol	1,820	1.8%	-2.2%
East Midlands	1,850	1.8%	19.3%
Stansted	1,570	1.5%	32.7%
Other UK Air	70	0.1%	-11.8%
<b>Total UK Air</b>	<b>67,880</b>	<b>66.0%</b>	<b>5.2%</b>
Jersey	15,650	15.2%	-4.3%
Alderney	3,410	3.3%	1.2%
<b>Total CI Air</b>	<b>19,060</b>	<b>18.5%</b>	<b>-3.4%</b>
Dinard	310	0.3%	-34.0%
Swiss Air	10	*	-47.8%
Other Foreign Air	370	0.4%	3.1%
<b>Total Foreign Air</b>	<b>690</b>	<b>0.7%</b>	<b>-18.9%</b>
<b>Total Air:</b>	<b>87,630</b>	<b>85.2%</b>	<b>3.0%</b>
UK Sea	6,850	6.7%	19.4%
Jersey	3,290	3.2%	16.2%
Sark	1,870	1.8%	-1.6%
St. Malo	2,320	2.3%	55.3%
Herm	830	0.8%	-0.2%
Other French Sea	0	0%	0%
Alderney	0	0%	0%
<b>Total Sea:</b>	<b>15,170</b>	<b>14.8%</b>	<b>18.5%</b>
<b>Total Departures:</b>	<b>102,800</b>		<b>5.0%</b>

## 2015 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.

### **Island Ark Ltd.**

11 – 13 Duhamel Street  
St. Helier  
Jersey JE2 4TN

Telephone: 01534 733170  
Email: [julian@island-ark.com](mailto:julian@island-ark.com)  
Website: [www.island-ark.com](http://www.island-ark.com)