

2015 Travel Survey

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

RESEARCH REPORT ON Q3 2015

November 9th 2015

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Summary of Results for Q3

	<u>2014</u>	<u>2015</u>	<u>% change</u>
Total departing passengers	210,600	202,400	-3.9%
Total departing visitors	130,650	121,100	-7.3%
Departing visitors by air	68,000	66,850	-1.7%
Departing visitors by sea	62,650	54,250	-13.4%
Staying leisure visitors	66,500	61,600	-7.3%
Visiting friends and relatives	22,100	23,300	+5.7%
Staying business / conference	7,250	8,100	+11.4%
Leisure day visits	19,900	13,100	-34.4%
Business day visits	5,400	2,400	-56.1%
Total for the above purposes of visit *	121,100	108,450	-10.5%
Total staying visitors	96,400	93,800	-2.6%
Average length of stay **	5.42 nights	5.50 nights	+1.6%
Total overnight stays (bed nights) **	519,700	512,850	-1.3%
Total staying in commercial accommodation	74,700	71,350	-4.5%
Average stay in commercial accommodation	5.17 nights	5.18 nights	+0.2%
Bed nights in commercial accommodation	386,500	369,600	-4.4%
Day visits	34,300	27,250	-20.5%
UK visitors	90,400	88,800	-1.8%
Jersey visitors	11,300	8,800	-22.2%
Other nationalities	29,000	23,500	-18.8%
Cruise ship passengers ***	54,450	60,930	+11.9%
Visiting yachtsmen ***	10,050	13,500	+34.4%
Departing Guernsey residents	79,450	81,200	+2.2%
Departing residents by air	55,250	55,500	+0.4%
Departing residents by sea	24,200	25,700	+6.3%
Net Promoter Score	78%	56%	

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.**

Summary of Results – January to September

	<u>2014</u>	<u>2015</u>	<u>% change</u>
Total departing passengers	475,500	468,900	-1.4%
Total departing visitors	260,700	249,700	-4.2%
Departing visitors by air	151,650	149,700	-1.3%
Departing visitors by sea	109,050	100,000	-8.3%
Staying leisure visitors	119,500	116,000	-2.9%
Visiting friends and relatives	43,900	51,950	+18.4%
Staying business / conference	26,900	25,150	-6.5%
Leisure day visits	36,500	23,300	-36.2%
Business day visits	17,200	10,000	-41.9%
Total for the above purposes of visit *	244,000	226,350	-7.2%
Total staying visitors	192,100	195,800	+1.9%
Average length of stay **	4.89 nights	4.98 nights	+1.8%
Total overnight stays (bed nights) **	933,800	969,000	+3.8%
Total staying in commercial accommodation	147,200	147,500	+0.2%
Average stay in commercial accommodation	4.55 nights	4.62 nights	+1.5%
Bed nights in commercial accommodation	669,050	680,750	+1.7%
Day visits	68,600	53,900	-21.5%
UK visitors	179,300	180,600	+0.7%
Jersey visitors	28,700	23,100	-19.4%
Other nationalities	52,700	46,000	-12.7%
Cruise ship passengers ***	105,360	120,560	+14.4%
Visiting yachtsmen ***	16,000	19,150	+19.6%
Departing Guernsey residents	213,850	218,700	+2.3%
Departing residents by air	160,400	162,200	+1.2%
Departing residents by sea	53,450	56,400	+5.6%
Net Promoter Score	75%	55%	

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

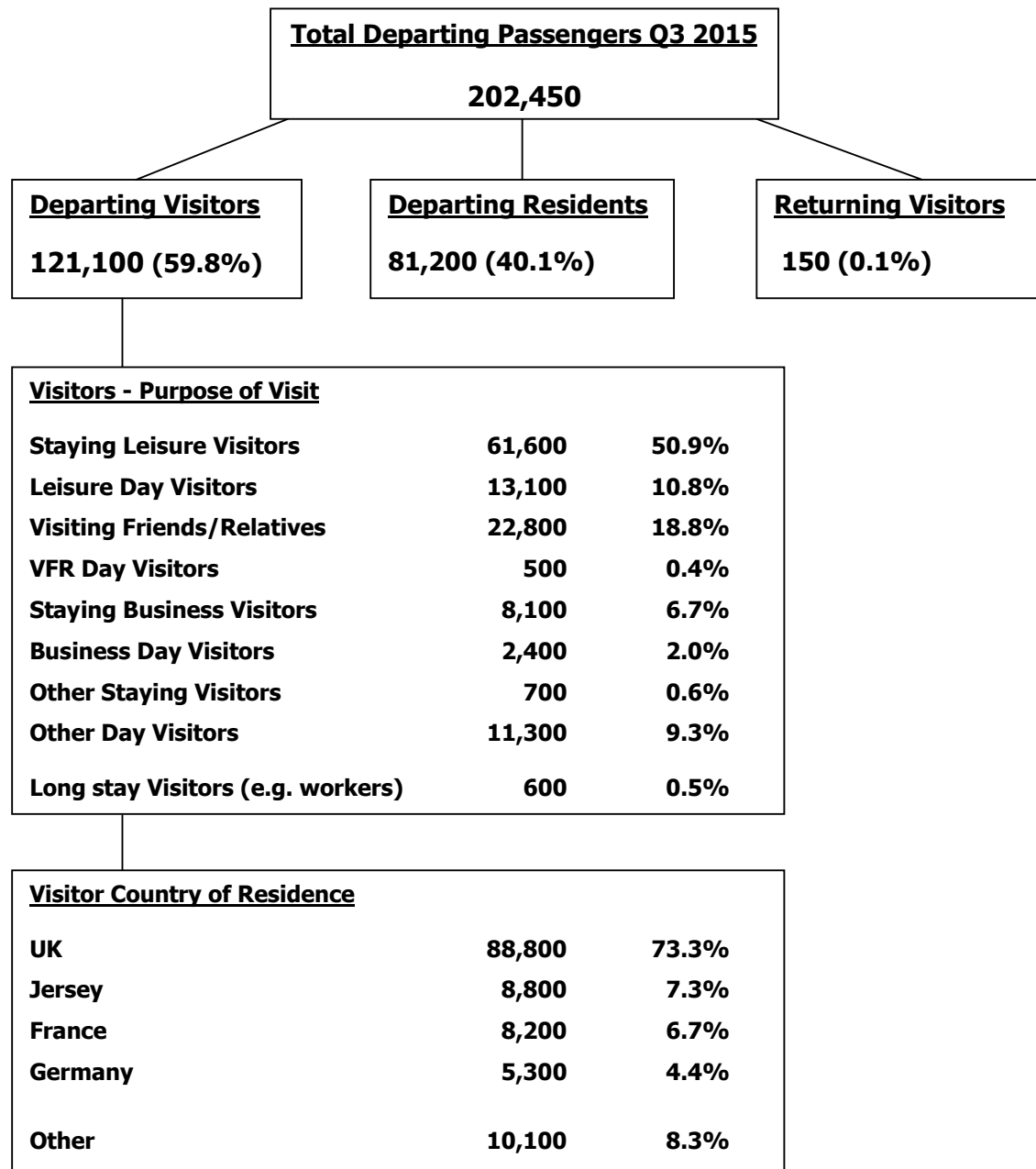
*** These figures exclude "Other staying", "Other day" and "Long stay" visitors as shown in the breakdown on page 2 and as defined in the appendices.**

**** 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.**

Q3 Survey Results – Excluding Alderney, Sark and Herm Departures

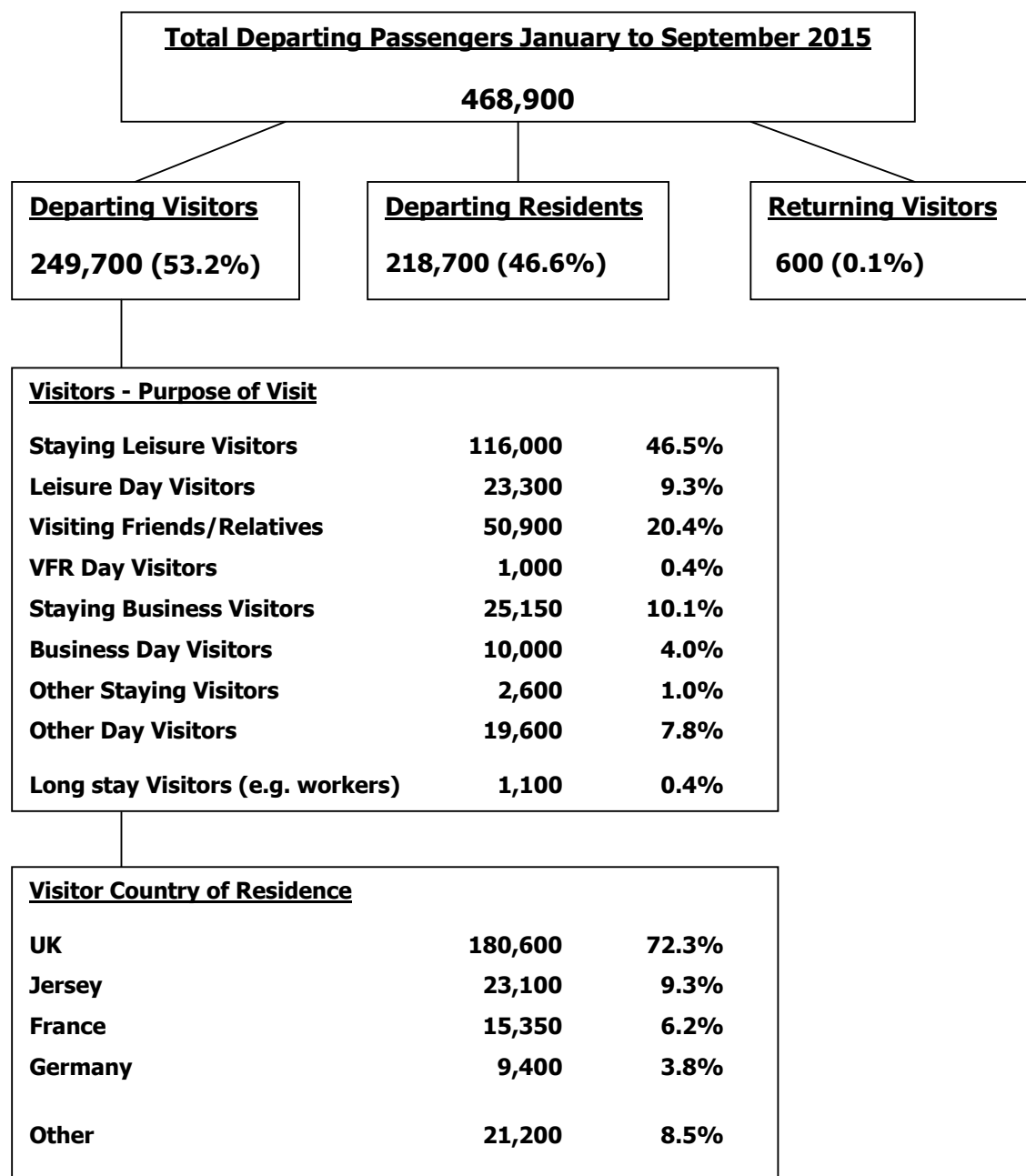
Excluding the Alderney, Sark and Herm routes, the passenger numbers for the **third quarter** of 2015 were broken down as follows:



In addition to the above, there were **60,930 passengers on cruise ships** and **13,500 visiting yachtsmen** arriving in Guernsey over the period July to September.

Cumulative Survey Results – January to September

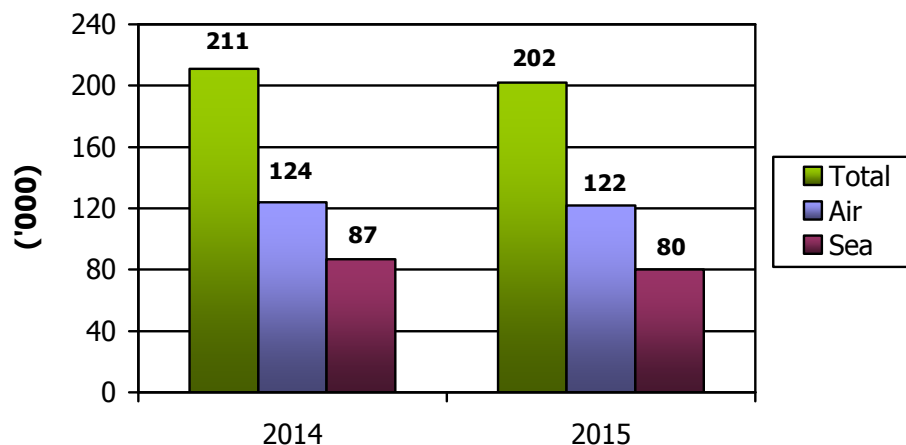
Excluding the Alderney, Sark and Herms routes, the passenger numbers for the **first, second and third quarters** of 2015 were broken down as follows:



In addition to the above, there have been **120,560 passengers on cruise ships** and **19,150 visiting yachtsmen** arriving in Guernsey up to the end of September.

Comparisons with 2014

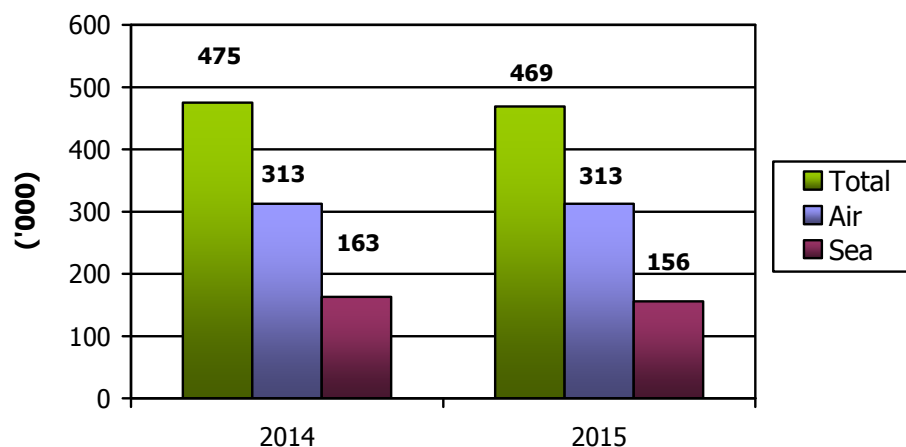
Passenger Departures Q3 2014 and 2015



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

Compared to Quarter 3 2014, there has been a 3.9% decrease in passenger departures from Guernsey, with a 0.9% decrease in passenger departures by air and an 8.1% decrease in passenger departures by sea.

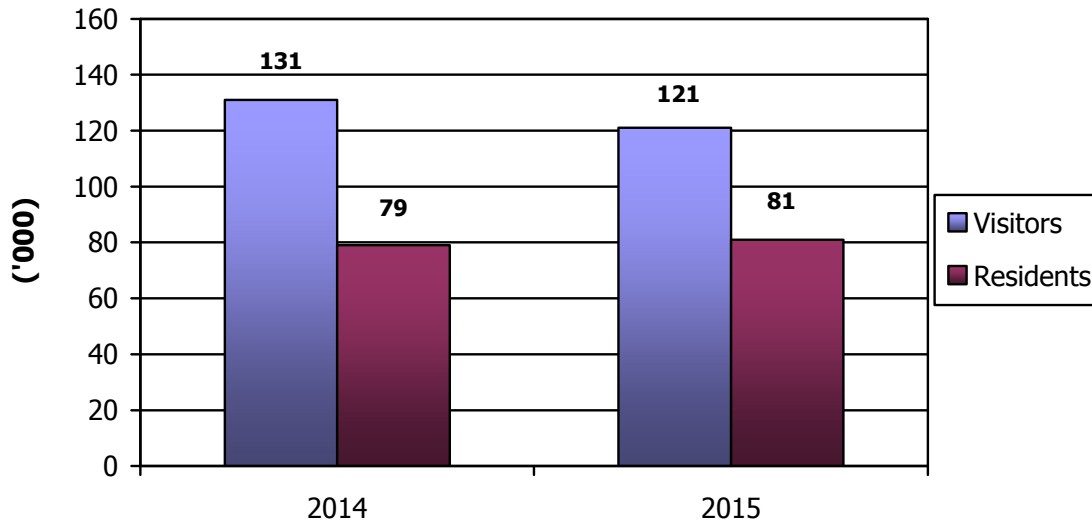
Passenger Departures January to September 2014 and 2015



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

Compared to the first 9 months of 2014, there has been a 1.4% decrease in passenger departures from the Bailiwick, with a 0.1% decrease in passenger departures by air and a 3.8% decrease in passenger departures by sea.

Visitors vs. Residents Q3 2014 and 2015



Excluding travel from within the Bailiwick, there were **121,100 visitor departures** between July and September 2015 and **81,200 resident departures**.

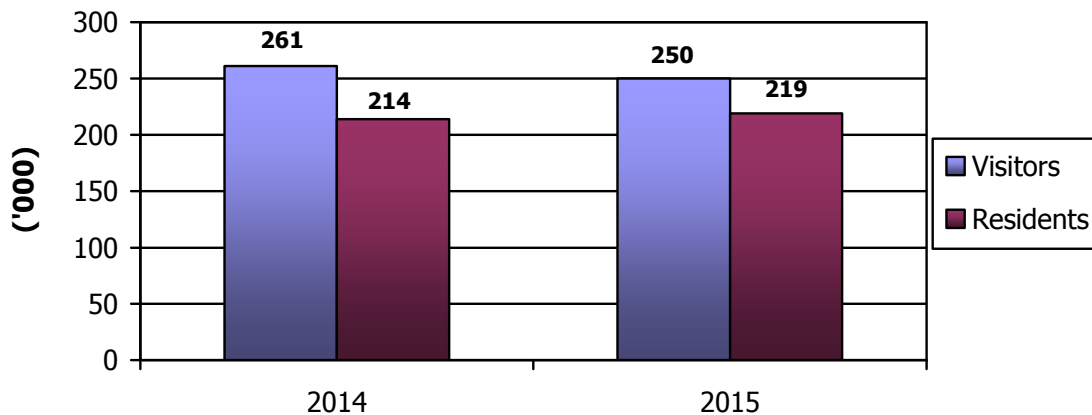
Visitor departures have **decreased overall by 7.3%** compared to Quarter 3 2014.

Excluding "returning visitors", 59.8% of departing passengers in Quarter 3 2015 were visitors to Guernsey, compared to 62.2% over the same period in 2014.

For air passengers, 66,800 (54.6%) were departing visitors and 55,500 were departing residents.

For sea passengers, 54,250 (67.8%) were departing visitors and 25,700 were departing residents.

Visitors vs. Residents January to September 2014 and 2015



Excluding travel from within the Bailiwick, there were **249,700 visitor departures** between January and September 2015 and **218,700 resident departures**.

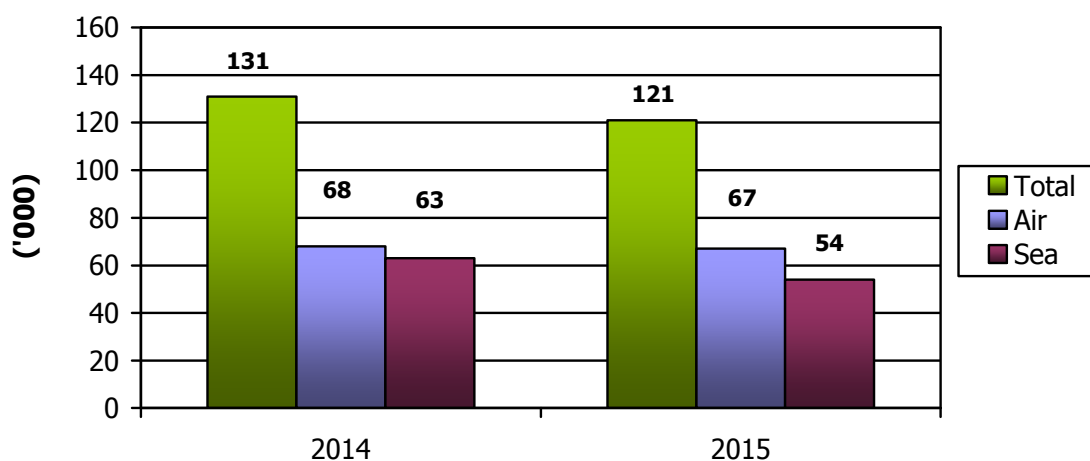
Visitor departures have **decreased overall by 4.2%** compared to the same period in 2014.

Excluding the 600 "returning visitors", 53.2% of departing passengers over the first 9 months of 2015 were visitors to Guernsey, compared to 54.9% over the same period in 2014.

For air passengers, 149,700 (47.9%) were departing visitors and 162,200 were departing residents.

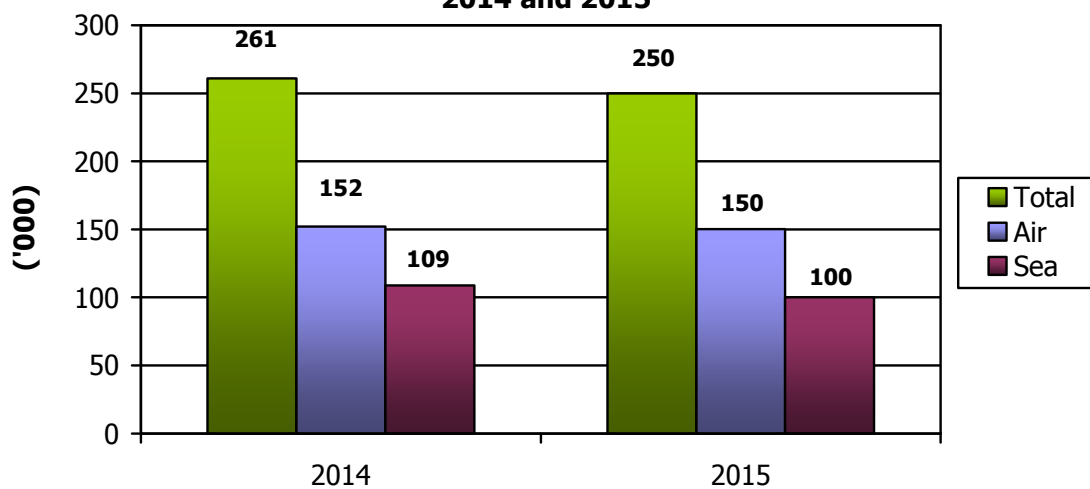
For sea passengers, 100,000 (63.9%) were departing visitors and 56,400 were departing residents.

Visitor Volumes by Travel Method Q3 2014 and 2015



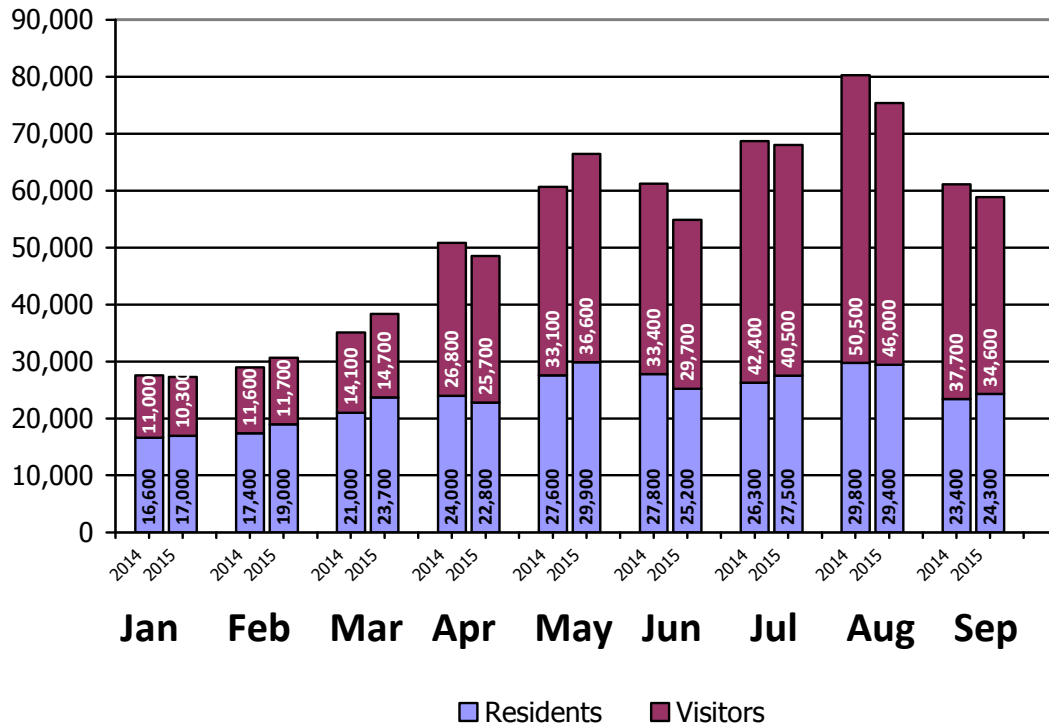
Compared to Quarter 3 2014, there has been a 1.7% decrease in visitors to Guernsey by air and a 13.4% decrease in visitors by sea.

January-September Visitor Volumes by Travel Method 2014 and 2015



Compared to the first 9 months of 2014, there has been a 1.3% decrease in visitors to Guernsey by air and an 8.3% decrease in visitors by sea.

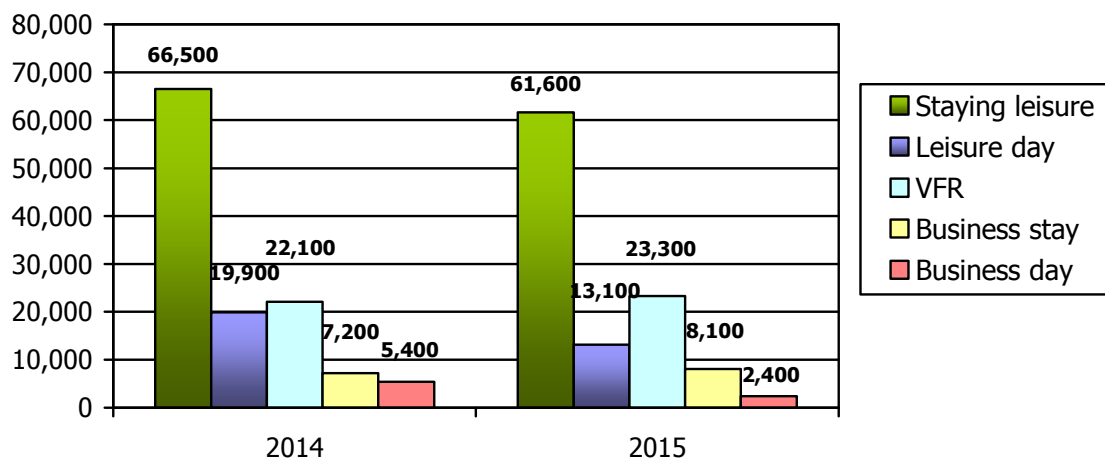
Visitor and Resident Departures by Month 2014 and 2015



Over Q1, visitor departures decreased by 6.6% in January, and increased by 1.3% in February and by 4.0% in March. Over Q2, visitor departures decreased by 4.1% in April, increased by 10.3% in May and decreased by 11.3% in June. Over Q3, visitor departures decreased by 4.6% in July, by 8.9% in August and by 8.2% in September.

Visitors by Purpose of Visit and Travel Method

Visitor Volumes by Visit Purpose Q3 2014 and 2015



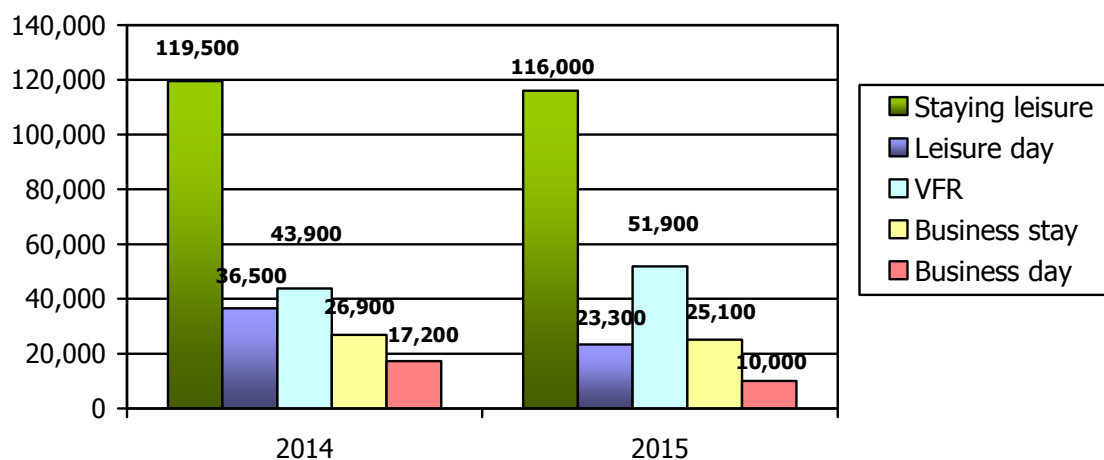
Compared to Quarter 3 2014, there has been an 11.4% increase in those staying in Guernsey for business purposes and a 5.7% increase in those visiting friends and relatives. Staying leisure visitors have fallen by 7.3%, leisure day visits have fallen by 34.4% and business day visits have fallen by 56.1%.

Breakdown by air and sea – Q3 2014 vs. Q3 2015:

	<u>Air</u>			<u>Sea</u>		
	2014	2015	% change	2014	2015	% change
Staying Leisure Visitors	35,300	33,800	-4.2%	31,160	27,790	-10.8%
Leisure Day visits	970	1,020	4.9%	18,970	12,060	-36.4%
Staying VFR	16,620	18,470	11.1%	5,300	4,340	-18.1%
VFR Day visits	100	110	11.6%	50	410	746%
Staying Business	5,760	5,530	-4.0%	1,490	2,550	71.1%
Business Day visits	5,020	2,040	-59.3%	400	340	-16.2%

Cumulative figures 2014 vs. 2015:

**Visitor Volumes by Visit Purpose January to September
2014 and 2015**

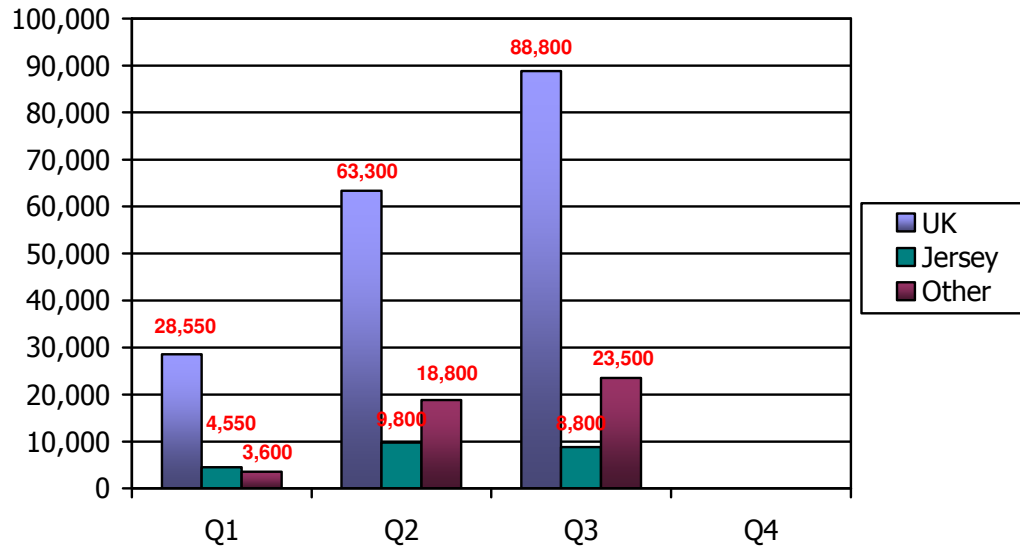


Compared to the first 9 months of 2014, there has been an 18.4% increase in those visiting friends and relatives. Staying leisure visitors have fallen by 2.9%, staying business/conference visitors have fallen by 6.5%, leisure day visits have fallen by 36.2% and business day visits have fallen by 41.9%.

Breakdown by air and sea to the end of September 2014 vs. 2015:

	<u>Air</u>			<u>Sea</u>		
	2014	2015	% change	2014	2015	% change
Staying Leisure Visitors	65,000	66,600	2.5%	54,490	49,380	-9.4%
Leisure Day visits	3,250	2,380	-26.8%	33,270	20,900	-37.2%
Staying VFR	35,570	41,420	16.4%	7,920	9,510	20.1%
VFR Day visits	290	430	44.9%	110	600	437.5%
Staying Business	22,980	19,160	-16.6%	3,920	5,990	52.7%
Business Day visits	16,240	9,110	-43.9%	970	880	-8.7%

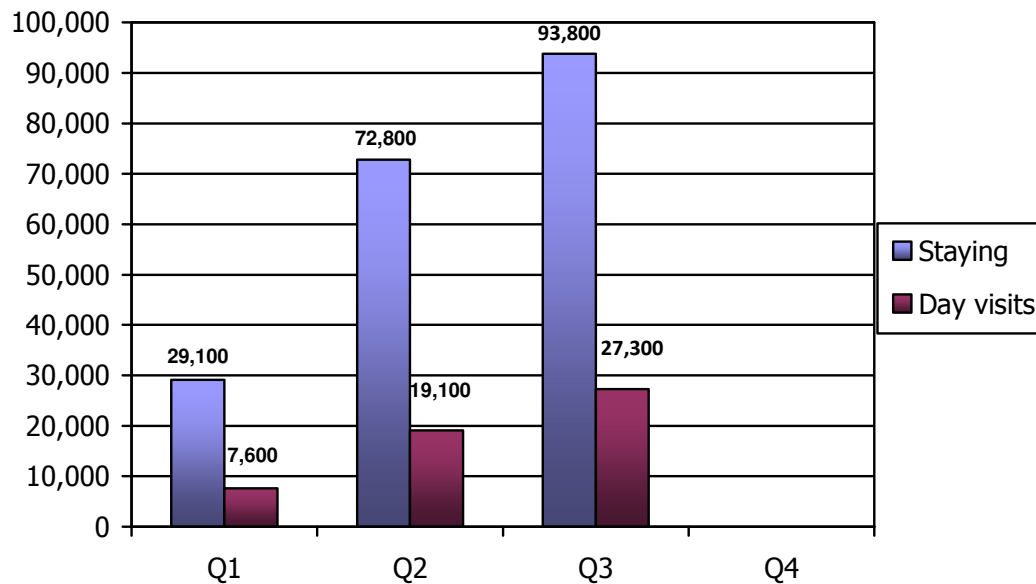
Visitor Country of Residence by Quarter 2015



73.3% of visitors to Guernsey in Quarter 3 2015 were resident in the UK, with **7.3%** coming from Jersey and the remaining **19.4%** coming from other countries.

Up to the end of September, the number of UK visitors has increased by 0.7% while the number of visitors from Jersey has decreased by 19.4% and the number of visitors from other markets has decreased by 12.7%.

Staying Visitors vs. Day Visits by Quarter 2015

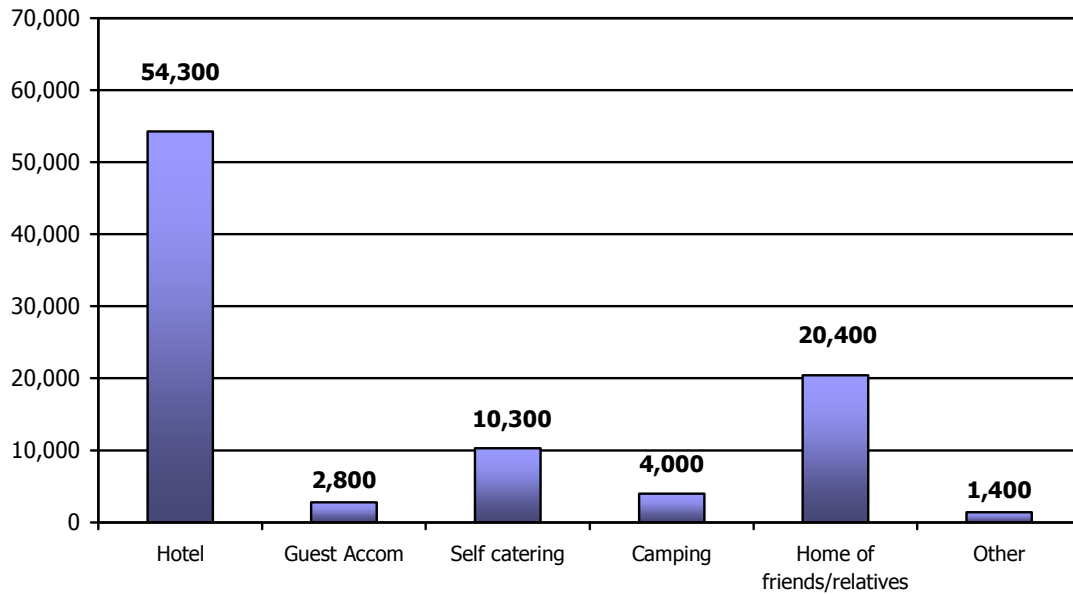


Compared to Quarter 3 2014, there has been a 2.6% decrease in visitors staying in Guernsey for at least 1 night, and a 20.5% decrease in day visits to Guernsey.

Cumulatively to the end of September, staying visitors have increased by 1.9% compared to 2014, while day visits have decreased by 21.5%.

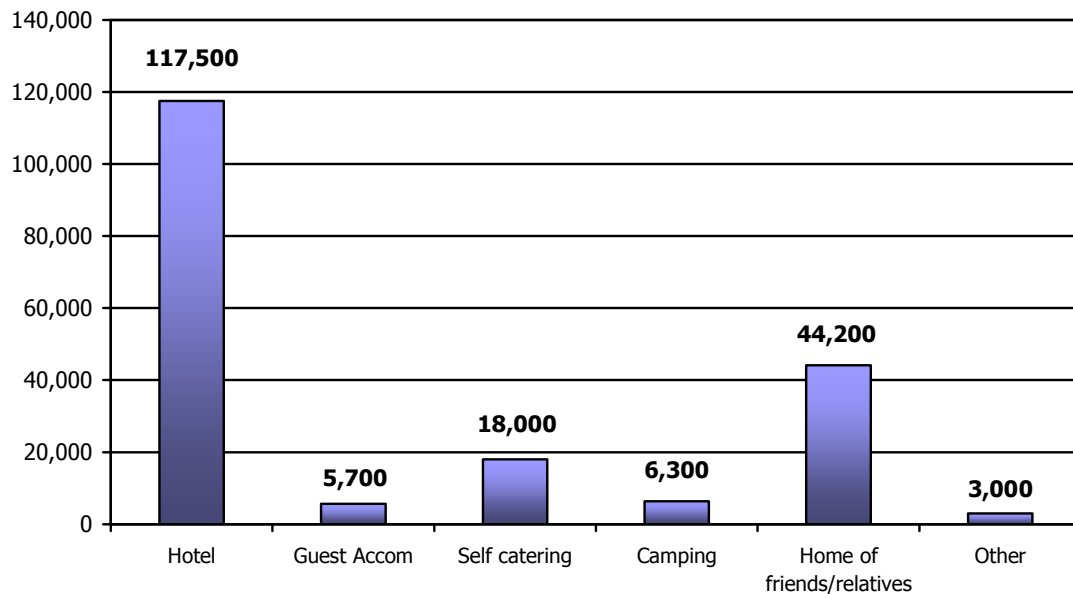
Accommodation used by Staying Visitors in Quarter 3 2015

Volume of Visitors by Accommodation Type Q3 2015



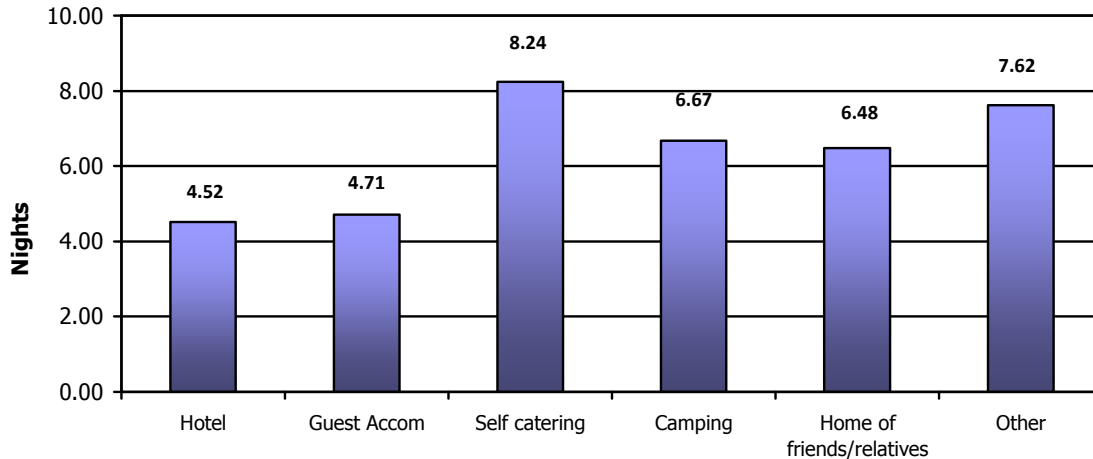
N.b. The above excludes long stay visitors (e.g. workers)

Visitors by Accommodation Type January to September 2015



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

Average Length of Stay by Accommodation Type Q3 2015



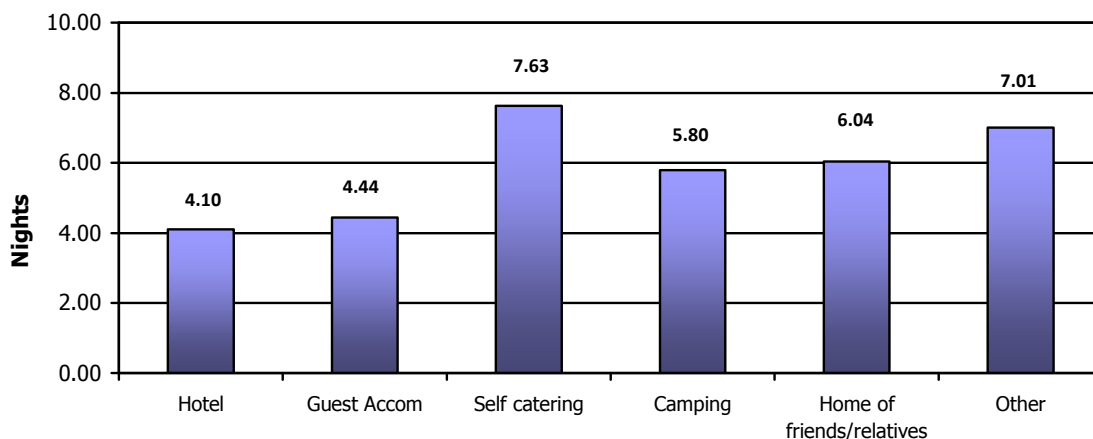
In total, there were **512,900** overnight stays in Guernsey in Quarter 3 2015 (-1.3%), with **369,600** bed nights sold in commercial accommodation (-4.4%).

The full breakdown was as follows:

Hotel bed nights:	245,400
Guest accommodation:	13,100
Self catering:	84,800
Camping:	26,400
Staying with friends/relatives:	132,500
Other	10,700

The overall average stay in Q3 for those spending at least a night in Guernsey was 5.50 nights, up from 5.42 nights in Q3 2014.

Average Length of Stay by Accommodation Type Jan to Sep 2015



Over the first 9 months of 2015, there were **969,000** overnight stays in Guernsey (+3.8%), with 680,700 bed nights sold in commercial accommodation (+1.7%).

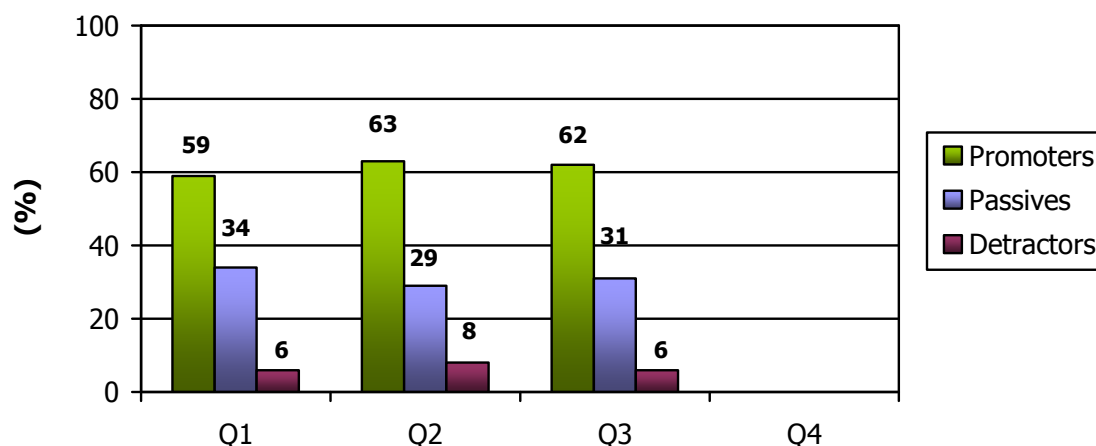
The full breakdown was as follows:

Hotel bed nights:	482,000
Guest accommodation:	25,300
Self catering:	137,100
Camping:	36,400
Staying with friends/relatives:	266,900
Other	21,300

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 by Quarter 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.

The overall average score in Q2 2015 was 8.72, with the Net Promoter Score being 55.2.

The overall average score in Q3 2015 was 8.79, with the Net Promoter Score being 56.1.

The overall average up to September 2015 was 8.76, with the Net Promoter Score being 55.3.

The Q3 results broken down by purpose of visit were as follows:

	<u>Average Score</u>	<u>Net Promoter Score</u>
Overall	8.79	56.1
Staying leisure visitors	8.97	63.3
Leisure day visitors	8.13	28.9
Staying VFR	9.11	67.9
Staying business visitors	8.52	45.5
Business day visitors	8.28	35.4

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

	<u>Average Score</u>	<u>Net Promoter Score</u>
Overall	8.76	55.3
Staying leisure visitors	8.96	63.1
Leisure day visitors	8.12	31.4
Staying VFR	9.12	68.0
Staying business visitors	8.49	45.2
Business day visitors	8.11	30.8

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 July to September 2015, **22,650** (18.5%) of the 122,500 departing air passengers were flying to an onward final destination.

16,050 (28.9%) of the 55,500 Guernsey residents travelling by air were flying to an onward destination and **6,600** (9.9%) of the 66,800 visitors to Guernsey departing by air were flying to an onward destination.

The breakdown for Q3 by route was as follows:

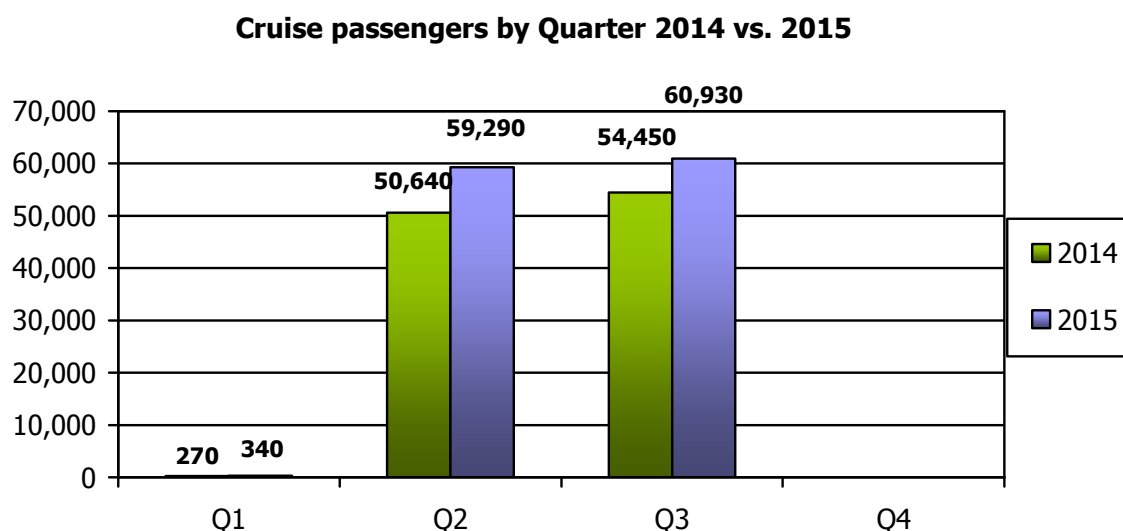
	<u>Visitor departures</u>	<u>Visitors travelling onward</u>	<u>Resident departures</u>	<u>Residents travelling onward</u>
Gatwick	19,280	2,450	25,950	13,440
Southampton	11,830	1,020	8,310	880
Manchester	7,950	120	3,710	170
East Midlands	5,560	0	700	30
Birmingham	3,400	610	1,000	280
Bristol	3,100	60	1,270	40
Exeter	1,560	70	2,010	70
Stansted	4,190	300	1,290	470
London City	1,460	120	1,590	80
Other UK Air	340	0	0	0
TOTAL UK AIR	58,670	4,750	45,850	15,450
Jersey air	6,430	1,720	9,250	600
Foreign air	1,750	130	380	0
TOTAL AIR	66,840	6,610	55,480	16,050

The main destinations/airports that passengers were travelling on to in Q3 were as follows:

1. Spanish mainland	2,110 passengers	(70 visitors)
2. Scottish airports	2,000 passengers	(1,060 visitors)
3. English airports	1,470 passengers	(810 visitors)
4. Italy	1,420 passengers	(60 visitors)
5. Germany	1,110 passengers	(960 visitors)
6. Balearic Islands	1,060 passengers	(10 visitors)
7. Ireland	1,050 passengers	(520 visitors)
8. Greece & Islands	800 passengers	(0 visitors)
9. Madeira	790 passengers	(50 visitors)
10. Switzerland	760 passengers	(540 visitors)
11. USA	700 passengers	(170 visitors)
12. Turkey	700 passengers	(0 visitors)
13. Portugal (excl. Madeira)	670 passengers	(50 visitors)
14. Canary Islands	620 passengers	(50 visitors)
15. Northern Ireland	620 passengers	(390 visitors)
16. France	560 passengers	(70 visitors)
17. Netherlands	540 passengers	(200 visitors)
18. Cyprus	520 passengers	(70 visitors)
19. Latvia	470 passengers	(20 visitors)
20. Canada	340 passengers	(70 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.



Over Q3, the number of cruise passenger arrivals has increased by **11.9%** compared to Q3 2014 and the cumulative total to the end of September has increased by **14.4%** from 105,360 in 2014 to 120,560 in 2015.

Over Q1 2015 there was one cruise ship arrival with 340 landed passengers in March compared to 1 cruise ship carrying 270 landed passengers in Q1 2014.

In April 2015, there were 9 cruise ships with a total of 6,740 landed passengers compared to 3 cruise ships with a total of 1,430 landed passengers in 2014.

In May 2015, there were 27 cruise ships with a total of 28,840 landed passengers compared to 24 cruise ships with a total of 26,810 landed passengers in 2014.

In June 2015, there were 19 cruise ships with a total of 23,700 landed passengers compared to 20 cruise ships with a total of 22,400 landed passengers in 2014.

In July 2015, there were 16 cruise ships with a total of 23,680 passengers compared to 13 cruise ships with a total of 20,510 passengers in 2014.

In August 2015, there were 16 cruise ships with a total of 23,350 passengers compared to 17 cruise ships with a total of 23,710 passengers in 2014.

In September 2015, there were 15 cruise ships with a total of 13,900 passengers compared to 10 cruise ships with a total of 10,240 passengers in 2014.

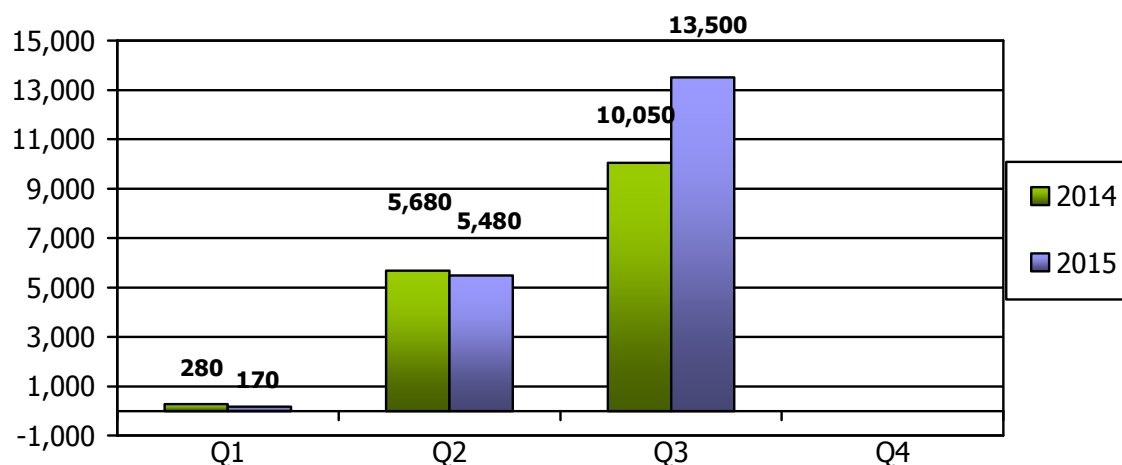
A new question was added to the survey in November 2014 asking visitors who had visited Guernsey previously whether they had ever visited before on a cruise.

From the 2,855 respondents who answered this question over Q3 2015, only 20 said that they had previously visited on a cruise. This represents **only 0.7%** of previous visitors to Guernsey.

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.

Visiting Yachtsmen by Quarter 2014 vs. 2015



Over Q3 2015, the number of pleasure passenger arrivals was **13,500 (+34.4%)** compared to 10,050 in Q3 2014.

Cumulatively to the end of September, the number of pleasure passenger arrivals has **increased by 19.6% to 19,150**.

The main increases have been in July (+29.8%) and August (+60.8%).

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 to 2012 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 and have not been included subsequent to 2012. These routes have been excluded from this quarterly analysis. It is 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 third 2015 quarterly report on passenger departures between July and September (Q3 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 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 July and September 2015, **423 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 Q3 therefore comes from **7,470 interviews, representing 16,210 departing passengers (8.0% of Guernsey's total departing passengers, excluding the Alderney, Sark and Herm routes, over Q3 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 over 16,000 passengers provides a strong degree of statistical confidence in the results for Q3 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 are planned in advance, but there is flexibility in the schedules as detailed above. Interview shifts are 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.

Sample Size	Research Results				
	10% or 90%	20% or 80%	30% or 70%	40% or 60%	50%
7,500	+/- 0.7	+/- 0.9	+/- 1.0	+/- 1.1	+/- 1.1
4,500	+/- 0.9	+/- 1.2	+/- 1.3	+/- 1.4	+/- 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

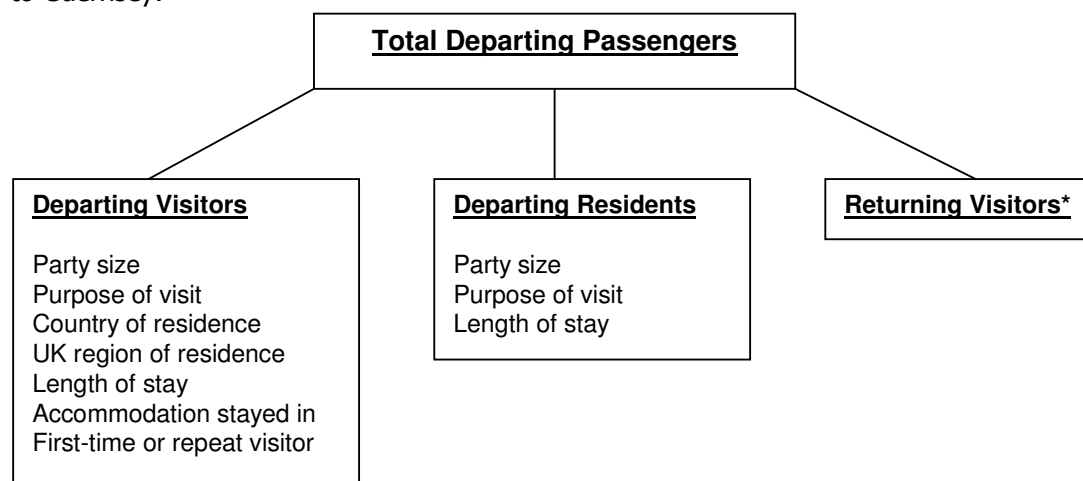
Based upon a total sample size from Q3 of 7,470, a finding that 59.8% of respondents were departing visitors would mean that the true figure for all respondents is 95% likely to be within the range 58.7% to 60.9%, but is more likely to be near the centre of this range (i.e. closer to the survey sample finding). For departing visitors, based upon a sub-sample size of 4,500, the finding that 50.9% were staying leisure visitors would have a statistical variation of between 49.4% and 52.4%. 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' is recorded by interviewers to provide an idea of the potential level of bias caused by interviewee self-selection and was 7.7% in Q3 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 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 – September 2015 (including Alderney, Sark and Herm):

	<u>Volume</u>	<u>% of total pax.</u>	<u>2015 vs. 2014</u>
London Gatwick	119,020	20.0%	0.0%
Southampton	52,980	8.9%	-24.0%
Manchester	26,340	4.4%	9.8%
East Midlands	12,530	2.1%	16.1%
Birmingham	10,930	1.8%	19.3%
Stansted	10,650	1.8%	32.9%
Exeter	9,540	1.6%	9.7%
Bristol	9,430	1.6%	2.6%
London City	8,770	1.5%	1461%
Other UK Air	580	0.1%	-24.1%
Total UK Air	260,780	43.9%	0.4%
Jersey	47,390	8.0%	-4.0%
Alderney	14,140	2.4%	-2.3%
Total CI Air	61,530	10.4%	-3.6%
Dinard	970	0.2%	-18.5%
Swiss Air	140	*	91.8%
Other Foreign Air	3,230	0.5%	36.2%
Total Foreign Air	4,340	0.7%	19.4%
Total Air:	326,640	55.0%	-0.2%
UK Sea	66,300	11.2%	-11.7%
Jersey	46,990	7.9%	1.0%
Herm	65,740	11.1%	-6.8%
Sark	45,460	7.6%	-2.9%
St. Malo	35,560	6.0%	2.4%
Other French Sea	7,570	1.3%	18.8%
Alderney	60	*	-28.7%
Total Sea:	267,680	45.0%	-4.5%
Total Departures:	594,320		-2.2%

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.

Island Ark interviewers are also 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 checked and edited 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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