

2012 Travel Survey

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

RESEARCH REPORT ON Q1 2012

April 26th 2012

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Summary of Results

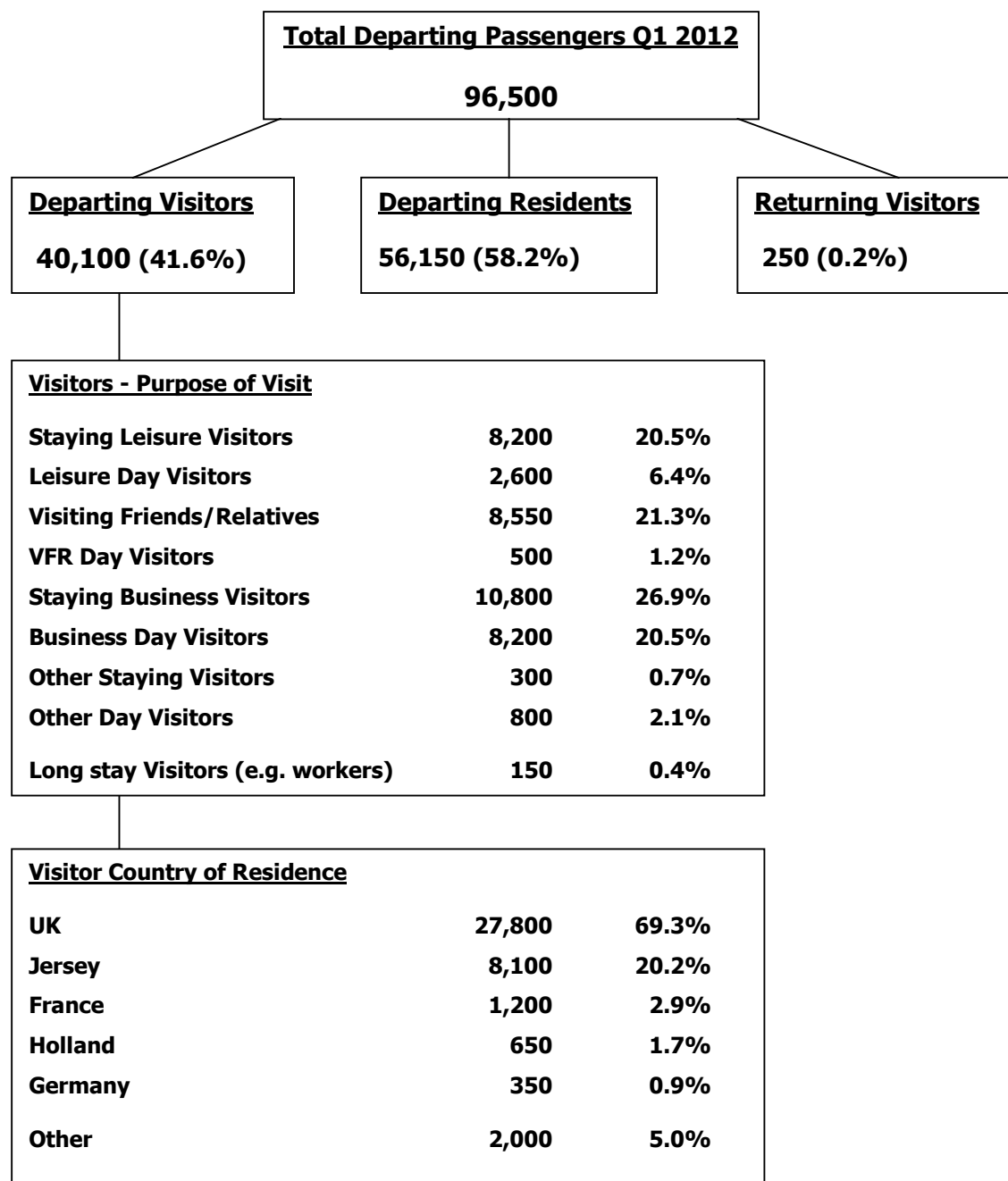
- Including the Alderney, Sark and Herm routes, there were **103,900** (-1.9%) departing passengers from Guernsey over the period January through to March 2012 (Q1).
- Over Q1, there were **87,000** total passenger departures by air (-3.9%) and **16,900** departures by sea (+9.8%).
- Excluding the Bailiwick routes of Alderney, Sark and Herm, there were **96,500** (-1.2%) departing passengers in Q1 2012.
- In 2012, the largest volume increases have been on the Bristol and East Midlands air routes and the UK, Jersey and St. Malo sea routes. Other major air routes have seen year-on-year falls in passenger volume, notably Manchester and the now non-existent Plymouth route.
- In Q1 alone, there were **40,100** (-9.1%) visitor departures and **56,150** (+5.3%) resident departures.
- In Q1, **34,300** visitors departed on the air routes and **5,800** departed by sea.
- Over the first quarter of 2012, staying leisure visitors were down by 14.6% to **8,200**, staying business visitors were down by 21.2% to **10,800**, those visiting and staying with friends and relatives were down by 7.5% to **8,550**, leisure day visits were up by 4.3% to **2,600** and business day visits were down by 1.2% to **8,200**.
- To the end of March, there has been a 15.1% decrease in visitors staying in Guernsey to **28,000** and a 8.6% increase in day visits to **12,100**. Excluding those visiting friends and relatives, there has been a 18.0% decrease in staying visitors.
- **18,200** visitors stayed in commercial accommodation up to the end of March, representing **57,150** bed nights sold. **9,400** visitors stayed with friends or family in Guernsey.
- To the end of March, there have been **27,800** visitors to Guernsey from the UK, **8,100** visitors from Jersey, **1,200** visitors from France, **650** visitors from Holland and **2,350** visitors from other markets.

While the above represents a disappointing start to the season in 2012 compared to Q1 2011, it should be recognised that cumulative passenger departures over the first 3 months of the year represent less than 15% of total yearly passenger departures and around 13% of total yearly visitors. The winter months are also very much dominated by business rather than leisure visitors, with only 7% of total yearly staying leisure visitors arriving between January and March in 2011. The visitor numbers achieved in Q1 2012 were actually very similar to Q1 2010, indicating perhaps that the first 3 months of 2011 were particularly good, rather than 2012 being particularly bad.

The year-on-year fall in visitor departures has mainly been on the UK air routes where there has been a smaller proportion of departing business visitors in particular. This may have been caused to some extent by a large number of days affected by fog in Q1 2012, where business trips could have been cancelled rather than re-scheduled. There was also disruption to sea schedules in Q1 2012 due to adverse weather conditions and the cancellation of Weymouth sea services. A better picture of the 2012 season will be reflected in the report for Q2 where a much larger volume of visitors is recorded.

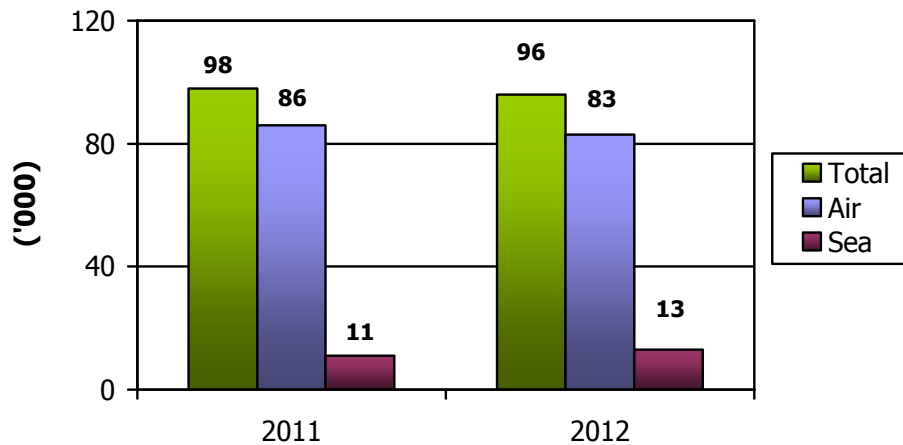
Q1 Survey Results – Excluding Alderney, Sark and Herm Departures

Excluding the Alderney, Sark and Herms routes, the passenger numbers for the **first quarter** of 2012 were broken down as follows:



Comparisons with 2011

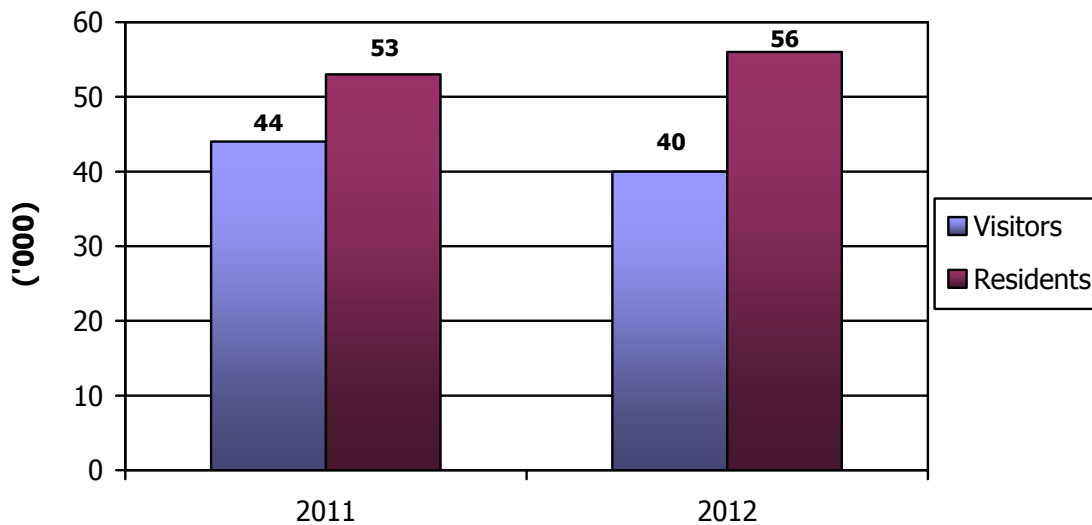
Passenger Departures Q1 2011 and 2012



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

Compared to Quarter 1 2011, there has been a 1.2% decrease in passenger departures from Guernsey, with a 3.4% decrease in passenger departures by air and a 15.6% increase in passenger departures by sea.

Visitors vs. Residents Q1 2011 and 2012



Excluding travel from within the Bailiwick, there were **40,100 visitor departures** between January and March 2012 and **56,150 resident departures**.

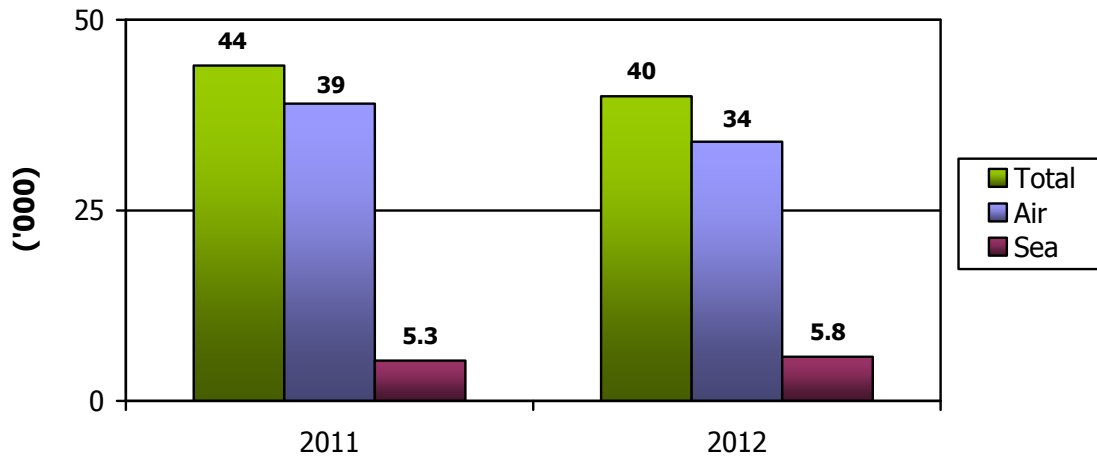
Visitor departures have **decreased overall by 9.1%** compared to Quarter 1 2011.

Excluding "returning visitors", 41.6% of departing passengers in Quarter 1 2012 were visitors to Guernsey, compared to 45.2% over the same period in 2011.

For air passengers, 34,300 (41.1%) were departing visitors and 48,900 were departing residents.

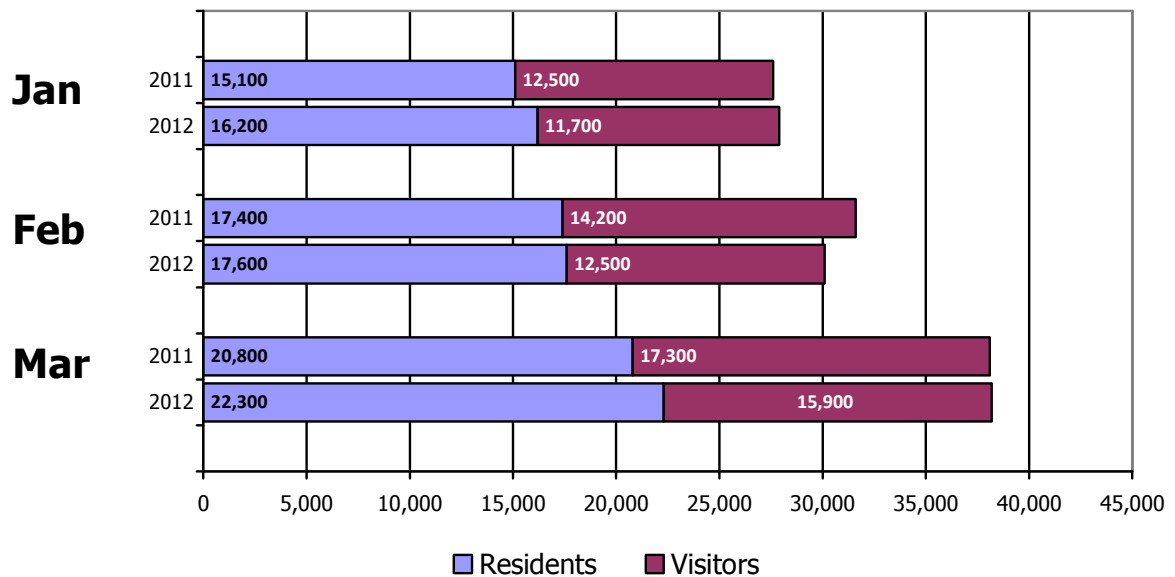
For sea passengers, 5,800 (44.4%) were departing visitors and 7,300 were departing residents.

Visitor Volumes by Travel Method Q1 2011 and 2012



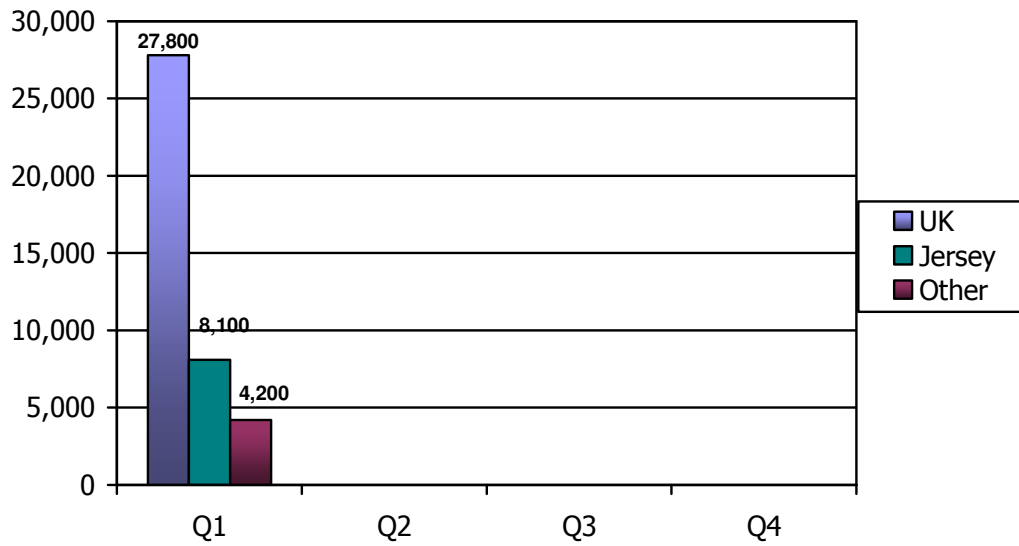
Compared to Quarter 1 2011, there has been a 11.6% decrease in visitors to Guernsey by air and a 9.5% increase in visitors by sea.

Visitor and Resident Departures by Month 2011 and 2012



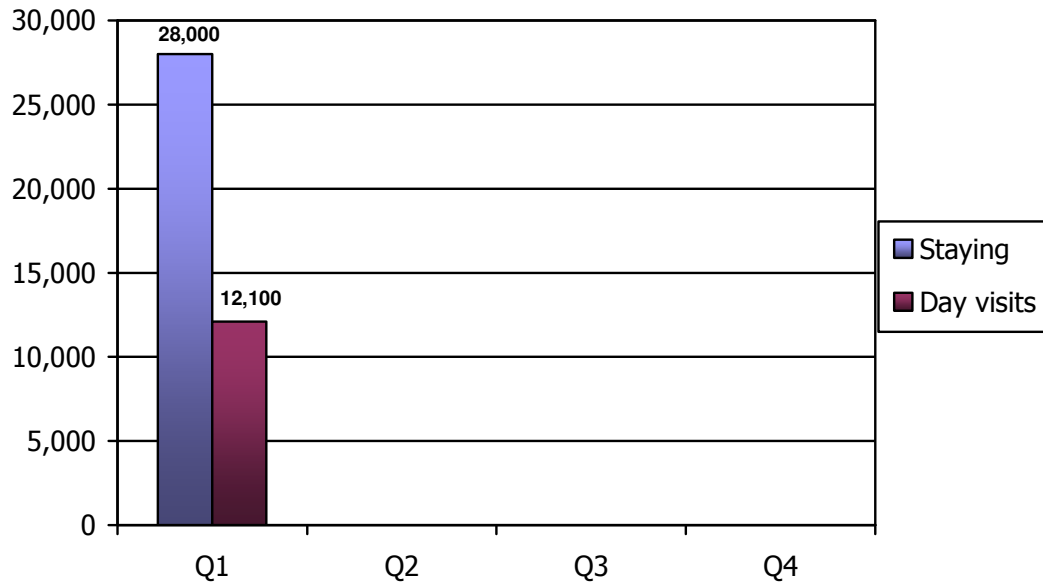
Visitor departures decreased by 6.9% in January, by 12.1% in February, and by 8.2% in March.

Visitor Country of Residence by Quarter 2012



69.3% of visitors to Guernsey in Quarter 1 2012 were resident in the UK, with 20.2% coming from Jersey and the remaining 10.5% coming from other countries.

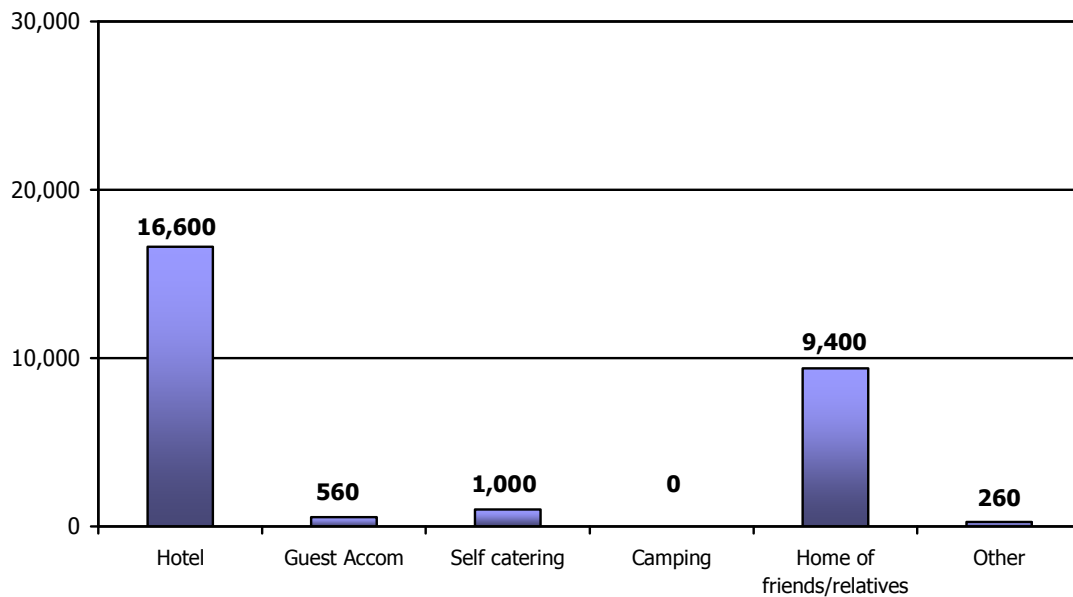
Staying Visitors vs. Day Visits by Quarter 2012



Compared to Quarter 1 2011, there has been a 15.1% decrease in visitors staying in Guernsey for at least 1 night, and a 8.6% increase in day visits to Guernsey. The highest fall in volume has been from staying business visits, but staying leisure visits are also down by 14.6%.

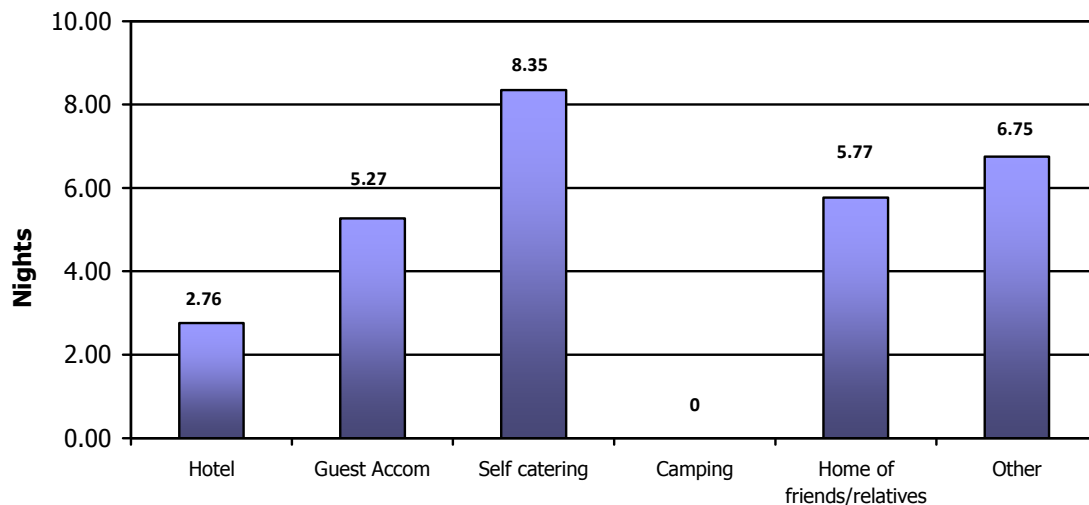
Accommodation used by Staying Visitors in Quarter 1 2012

Volume of Visitors by Accommodation Type Q1 2012



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

Average Length of Stay by Accommodation Type Q1 2012



In total, there were **113,200** overnight stays in Guernsey in Quarter 1 2012, with **57,150** bed nights sold in commercial accommodation. The full breakdown was as follows:

Hotel bed nights:	45,800
Guest accommodation:	2,950
Self catering:	8,400
Camping:	0
Staying with friends/relatives:	54,300
Other	1,750

The average stay in Q1 for those spending at least a night in Guernsey was 4.07 nights.

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, Island Ark has been running both the ongoing fieldwork and 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, although a separate breakdown of passengers on the Alderney, Sark and Herm routes is also now possible. It was also evident that the definition of holidaymakers and those visiting friends and relatives has differed between previous surveys (See 2012 definitions in the appendices).

The broad objectives of the 2012 Exit Survey are as follows:

- Determine the passenger composition of each of Guernsey's main air and sea transport routes across the whole of 2012
- 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 2012 quarterly report on passenger departures between January and March (Q1 2012).

Methodology

As with previous exit surveys, face-to-face interviews are being conducted with departing passengers throughout 2012, 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, the Harbour passenger and car terminals and the inter-Island harbour departure points to cover the sailings to Sark and Herm.

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 2012, **310 interviewer hours** were allocated to this Passenger Calibration Survey. The exact shift schedules were flexible in order to account for 2012 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 Herm, Sark and Alderney routes, Q1 data therefore comes from **4,670 interviews, representing 8,160 departing passengers (8.5% of Guernsey's total departing passengers over Q1 2012)** - 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 almost 8,200 passengers provides a strong degree of statistical confidence in the results for 2012. 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.

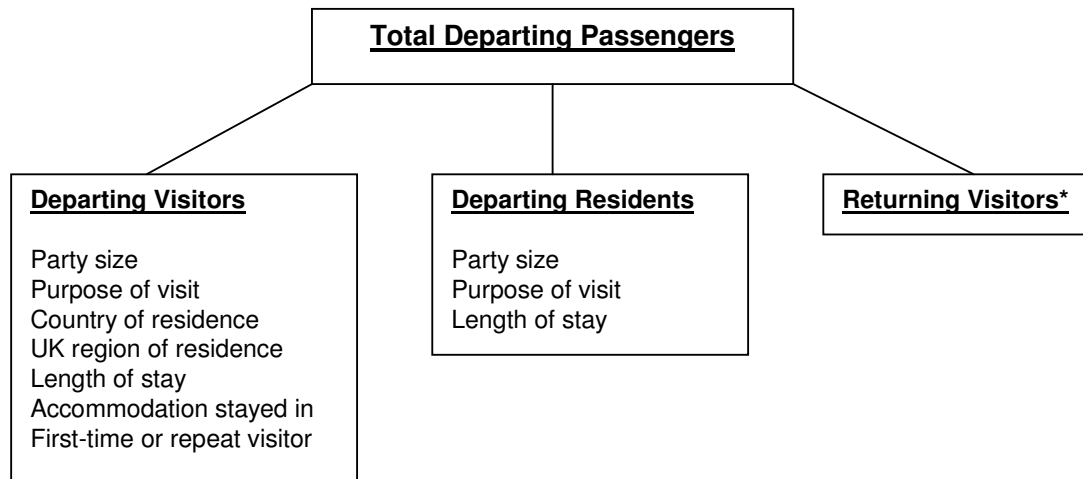
The detailed interview shifts were planned in advance, but there was flexibility in the schedules as detailed above. Interview shifts were planned to take account of the following:

- 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).

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 2012, 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.

2012 Passenger Departures Including Alderney, Sark and Herm Departures

Cumulative Passenger Departures by Route January – March 2012 (including Alderney, Sark and Herm):

	<u>Volume</u>	<u>% of total pax.</u>	<u>2012 vs. 2011</u>
London Gatwick	36,100	34.8%	-2.0%
Southampton	13,000	12.5%	-0.9%
Manchester	5,500	5.3%	-6.1%
Birmingham	2,700	2.6%	1.4%
Exeter	2,400	2.3%	-2.3%
Bristol	1,900	1.8%	13.8%
East Midlands	1,700	1.7%	6.1%
Stansted	1,600	1.5%	-3.4%
Other UK Air	100	0.1%	39.1%
Total UK Air	65,000	62.6%	-1.9%
Jersey	17,300	16.7%	-5.9%
Alderney	3,700	3.5%	-13.3%
Other	0	0%	
Total CI Air	21,000	20.2%	-7.3%
Dinard	600	0.6%	-22.0%
Swiss Air	40	*	-91.5%
Other Foreign Air	400	0.4%	-3.2%
Total Foreign Air	1,000	1.0%	-37.3%
Total Air:	87,000	83.7%	-3.9%
UK Sea	7,800	7.5%	11.2%
Jersey	2,900	2.8%	18.4%
Sark	2,800	2.7%	-2.6%
St. Malo	2,400	2.3%	28.4%
Herm	1,000	1.0%	-15.5%
Other French Sea	0	0%	0%
Alderney	0	0%	0%
Total Sea:	16,900	16.3%	9.8%
Total Departures:	103,900		-1.9%

2012 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".

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 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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