

2014 Travel Survey

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

RESEARCH REPORT ON Q3 2014

November 2nd 2014

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Summary of Results for Q3

	<u>2013</u>	<u>2014</u>	<u>% change</u>
Total departing passengers	207,700	210,600	+1.4%
Total departing visitors	118,800	130,650	+10.0%
Departing visitors by air	69,200	68,000	-1.7%
Departing visitors by sea	49,600	62,600	+26.4%
Staying leisure visitors	59,600	66,500	+11.4%
Visiting friends and relatives	20,300	22,100	+8.5%
Staying business / conference	9,800	7,250	-26.2%
Leisure day visits	14,300	19,900	+39.0%
Business day visits	6,100	5,400	-10.5%
Total for the above purposes of visit *	109,200	121,000	+10.9%
Total staying visitors	90,200	96,400	+6.9%
Average length of stay	5.44 nights	5.42 nights	-0.4%
Total overnight stays (bed nights)	488,000	519,700	+6.5%
Total staying in commercial accommodation	66,400	74,700	+12.6%
Average stay in commercial accommodation	5.16 nights	5.17 nights	+0.2%
Bed nights in commercial accommodation	352,500	386,500	+12.9%
Day visits	28,600	34,300	+19.9%
UK visitors	84,700	90,400	+6.7%
Jersey visitors	8,300	11,300	+35.4%
Other nationalities	25,700	29,000	+12.6%
Cruise ship passengers **	58,970	54,450	-7.6%
Visiting yachtsmen **	10,720	10,050	-6.3%
Departing Guernsey residents	88,300	79,450	-10.0%
Departing residents by air	52,750	55,250	+4.8%
Departing residents by sea	35,550	24,200	-31.9%
Net Promoter Score		78%	

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 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>2013</u>	<u>2014</u>	<u>% change</u>
Total departing passengers	468,400	475,500	+1.5%
Total departing visitors	254,500	260,700	+2.4%
Departing visitors by air	159,700	151,650	-5.0%
Departing visitors by sea	94,800	109,050	+15.0%
Staying leisure visitors	115,300	119,500	+3.7%
Visiting friends and relatives	44,400	43,900	-1.2%
Staying business / conference	30,650	26,900	-12.2%
Leisure day visits	27,650	36,500	+32.1%
Business day visits	21,400	17,200	-19.6%
Total for the above purposes of visit *	239,400	244,000	+1.9%
Total staying visitors	190,600	192,100	+0.8%
Average length of stay	4.86 nights	4.89 nights	+0.6%
Total overnight stays (bed nights)	921,200	933,800	+1.4%
Total staying in commercial accommodation	141,300	147,200	+4.2%
Average stay in commercial accommodation	4.52 nights	4.55 nights	+0.7%
Bed nights in commercial accommodation	639,100	669,100	+4.7%
Day visits	63,900	68,600	+7.4%
UK visitors	176,900	179,300	+1.4%
Jersey visitors	25,600	28,700	+12.0%
Other nationalities	52,000	52,700	+1.3%
Cruise ship passengers **	113,380	105,360	-7.1%
Visiting yachtsmen **	16,390	16,000	-2.4%
Departing Guernsey residents	212,550	213,800	+0.6%
Departing residents by air	151,050	160,400	+6.2%
Departing residents by sea	61,500	53,500	-13.1%
Net Promoter Score		75%	

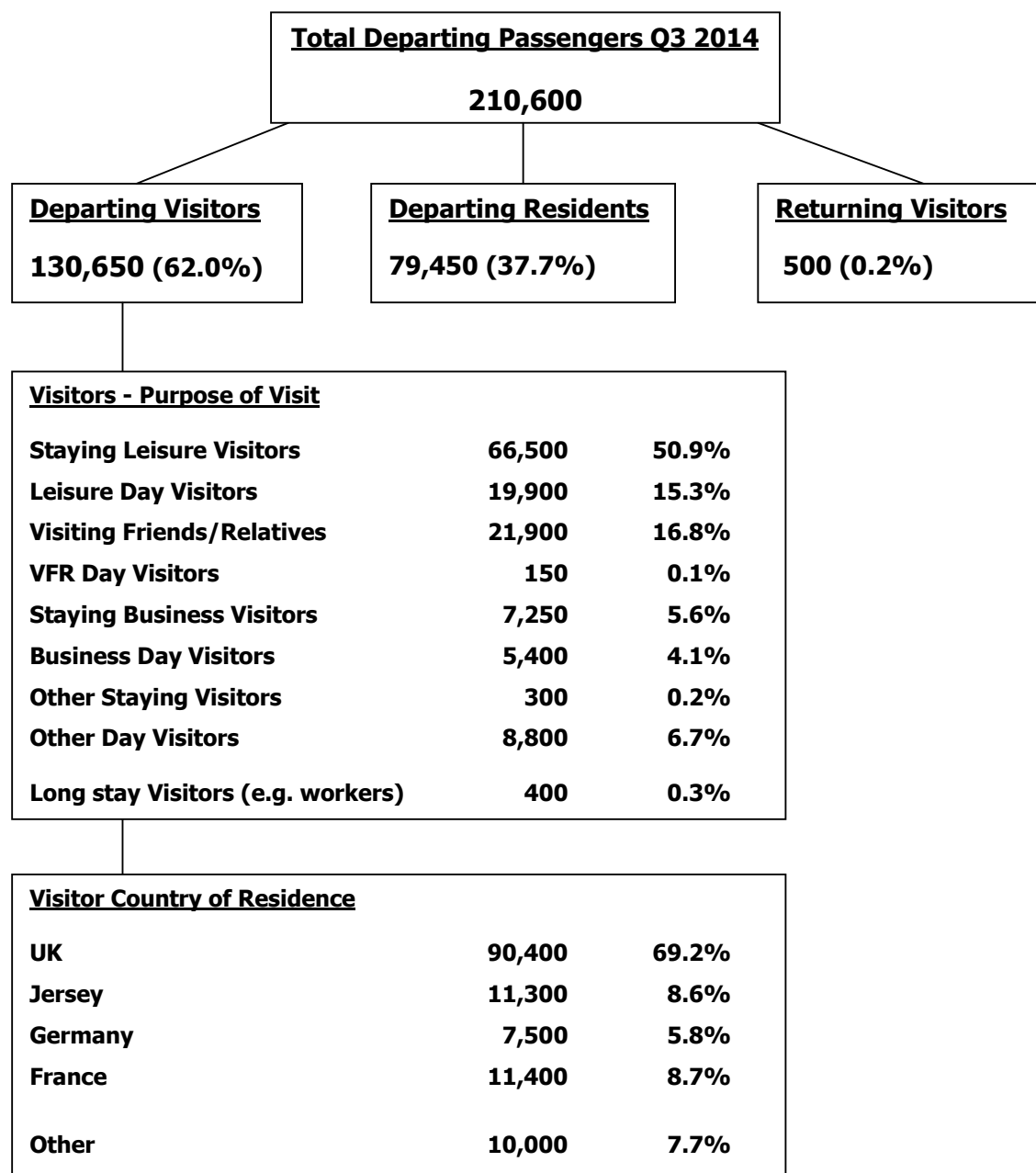
N.b. All of the above figures exclude passengers on the inter-Bailiwick air and sea routes of Alderney, Sark and Herm.

*** 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 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

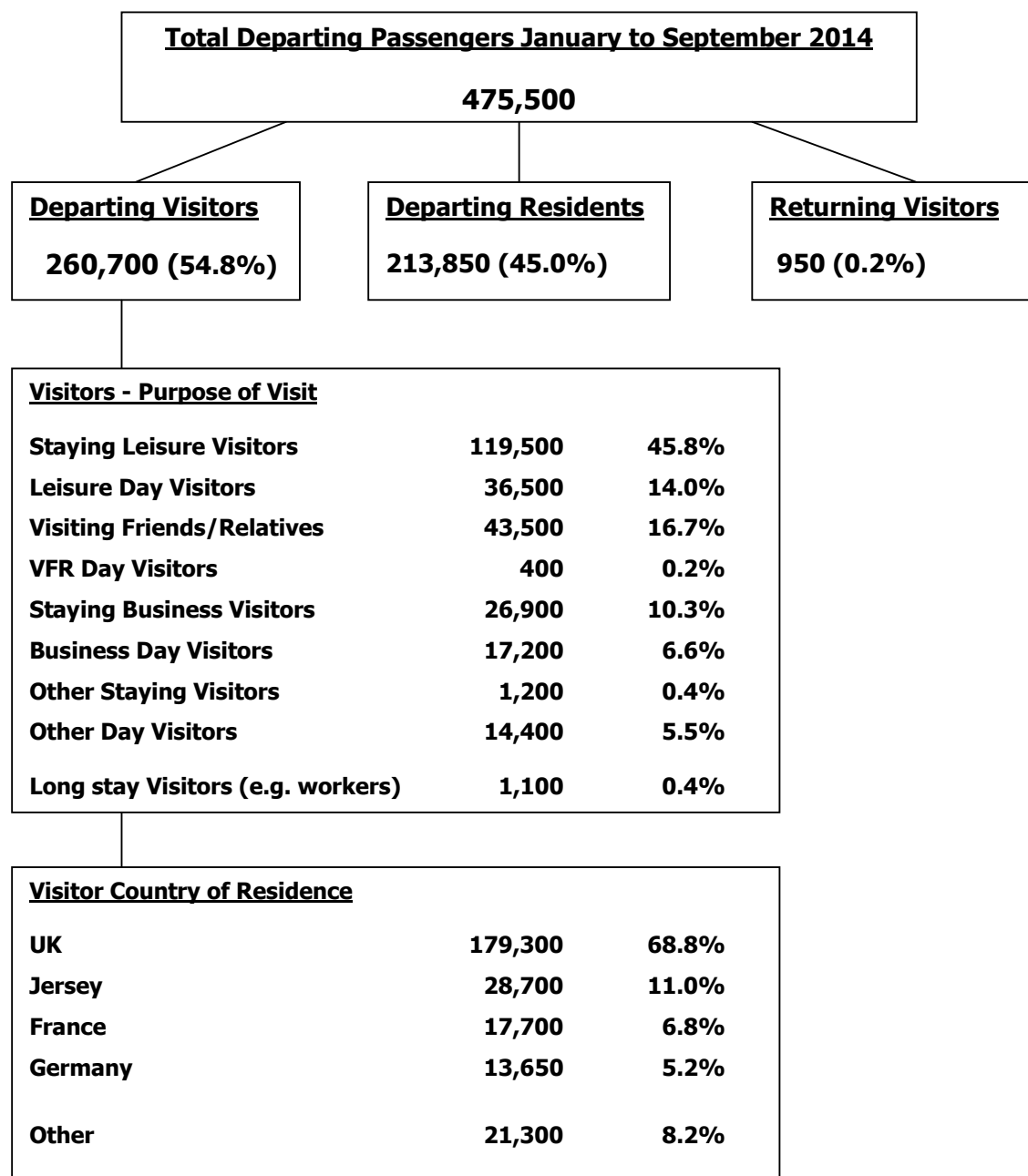
Excluding the Alderney, Sark and Herm routes, the passenger numbers for the **third quarter** of 2014 were broken down as follows:



In addition to the above, there were **54,450 passengers on cruise ships** and **10,050 visiting yachtsmen** arriving in Guernsey over the period July to September.

Cumulative Survey Results – January to September

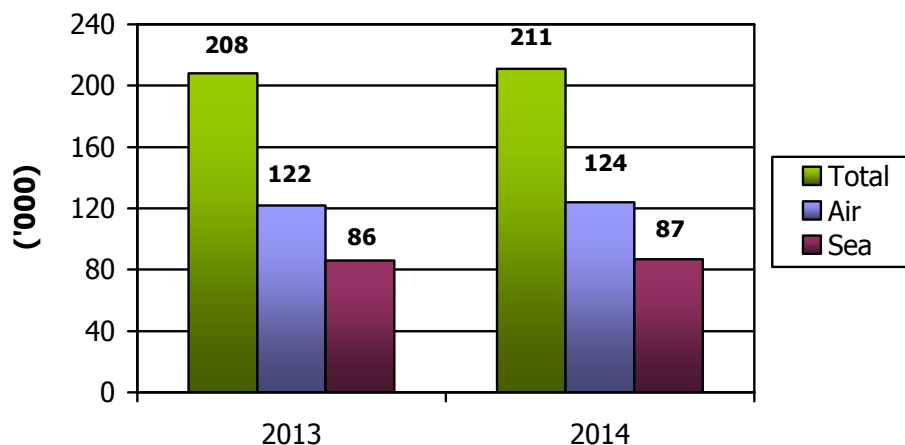
Excluding the Alderney, Sark and Herms routes, the passenger numbers for the **first, second and third quarters** of 2014 were broken down as follows:



In addition to the above, there have been **105,360 passengers on cruise ships** and **16,000 visiting yachtsmen** arriving in Guernsey up to the end of September.

Comparisons with 2013

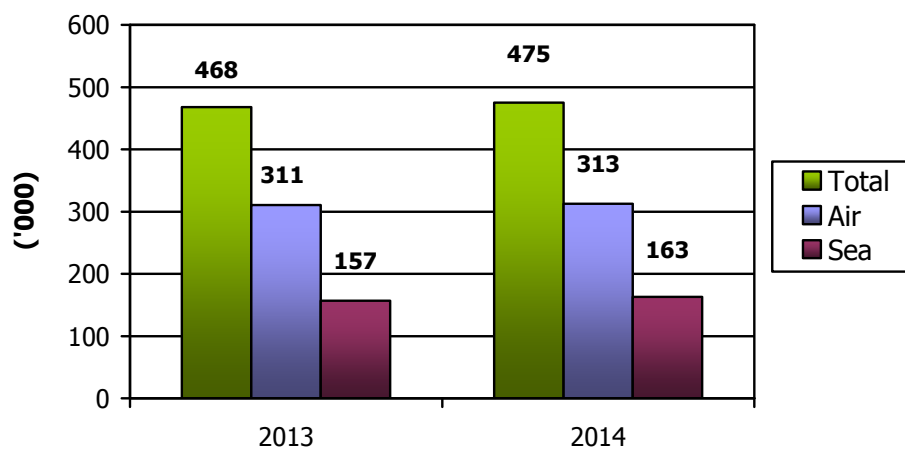
Passenger Departures Q3 2013 and 2014



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

Compared to Quarter 3 2013, there has been a 1.4% increase in passenger departures from Guernsey, with a 1.3% increase in passenger departures by air and a 1.6% increase in passenger departures by sea.

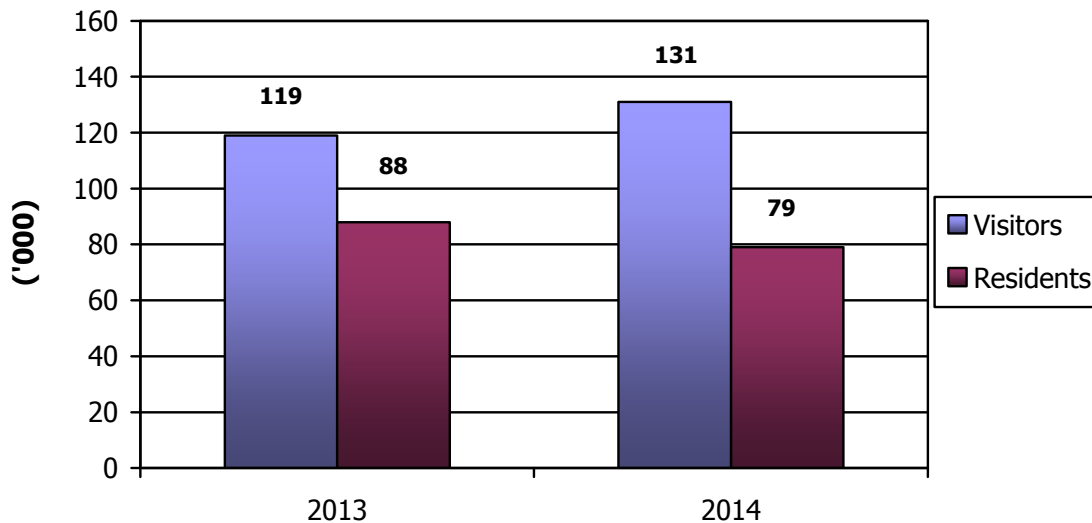
Passenger Departures January to September 2013 and 2014



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

Compared to the first 9 months of 2013, there has been a 1.5% increase in passenger departures from the Bailiwick, with 0.5% increase in passenger departures by air and a 3.5% increase in passenger departures by sea.

Visitors vs. Residents Q3 2013 and 2014



Excluding travel from within the Bailiwick, there were **130,650 visitor departures** between July and September 2014 and **79,450 resident departures**.

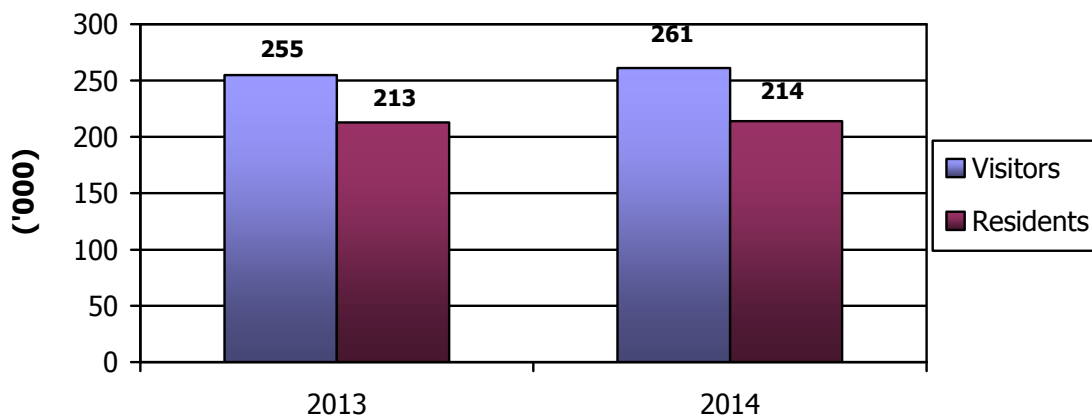
Visitor departures have **increased overall by 10.0%** compared to Quarter 3 2013.

Excluding "returning visitors", 62.2% of departing passengers in Quarter 3 2014 were visitors to Guernsey, compared to 57.4% over the same period in 2013.

For air passengers, 68,000 (55.0%) were departing visitors and 55,200 were departing residents.

For sea passengers, 62,600 (72.0%) were departing visitors and 24,200 were departing residents.

Visitors vs. Residents January to September 2013 and 2014



Excluding travel from within the Bailiwick, there were **260,700 visitor departures** between January and September 2014 and **213,800 resident departures**.

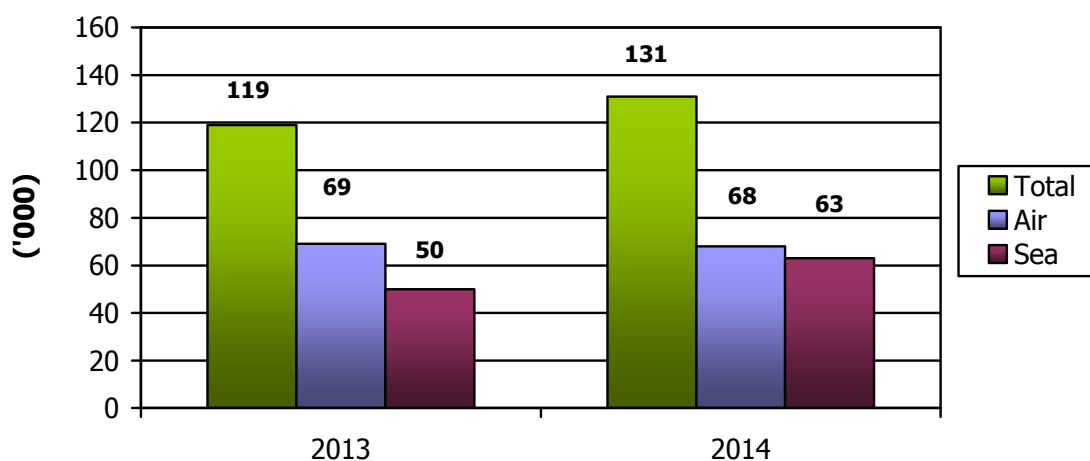
Visitor departures have **increased overall by 2.4%** compared to the same period in 2013.

Excluding the 950 "returning visitors", 54.9% of departing passengers over the first 9 months of 2014 were visitors to Guernsey, compared to 54.5% over the same period in 2013.

For air passengers, 151,600 (48.5%) were departing visitors and 160,400 were departing residents.

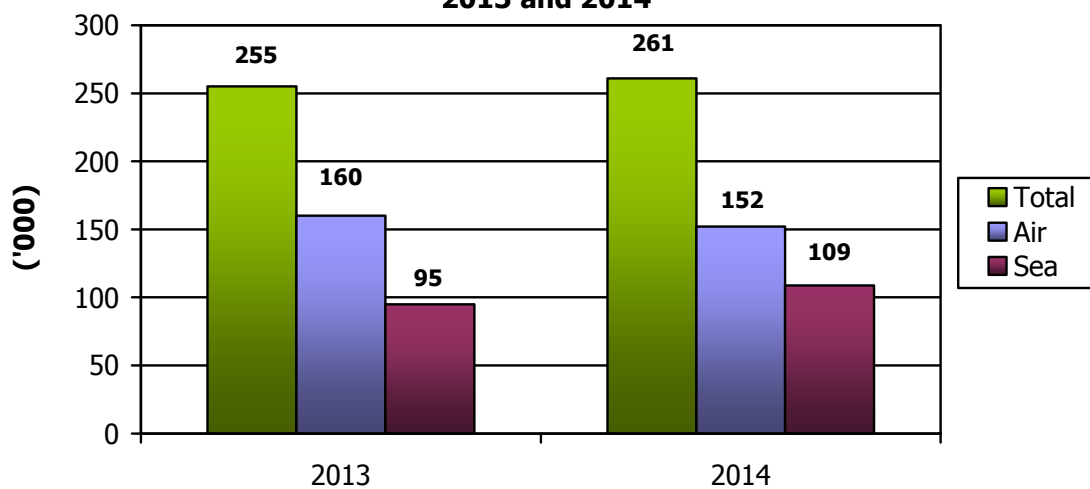
For sea passengers, 109,000 (67.0%) were departing visitors and 53,500 were departing residents.

Visitor Volumes by Travel Method Q3 2013 and 2014



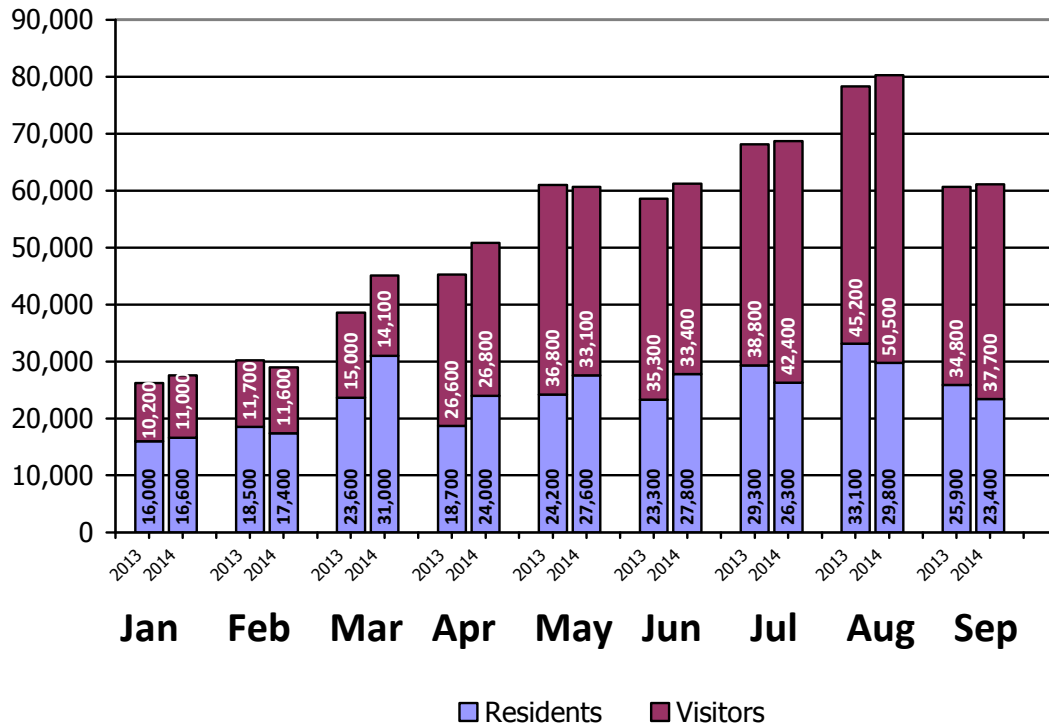
Compared to Quarter 3 2013, there has been a 1.7% decrease in visitors to Guernsey by air and a 26.4% increase in visitors by sea.

January-September Visitor Volumes by Travel Method 2013 and 2014



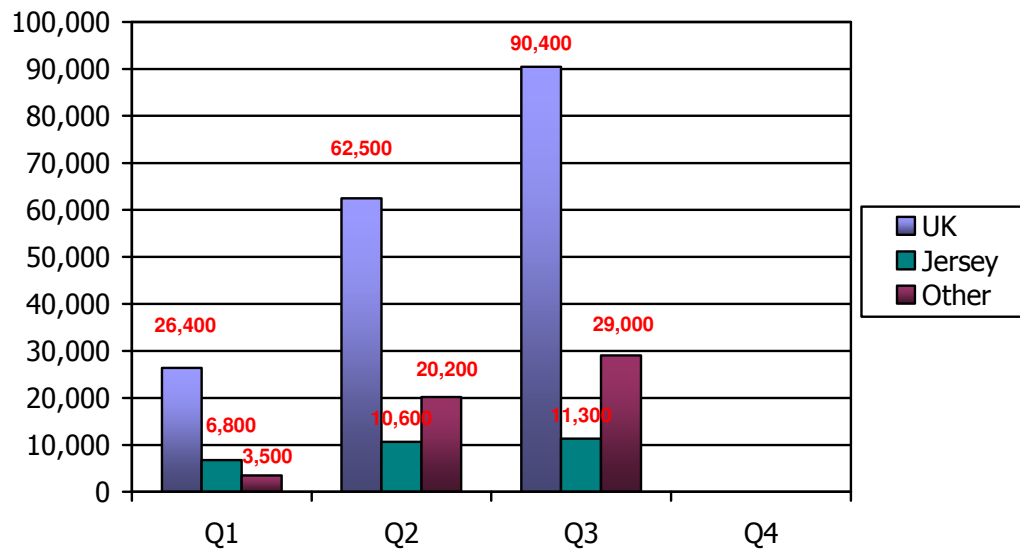
Compared to the first 9 months of 2013, there has been a 5.0% decrease in visitors to Guernsey by air and a 15.0% increase in visitors by sea.

Visitor and Resident Departures by Month 2013 and 2014

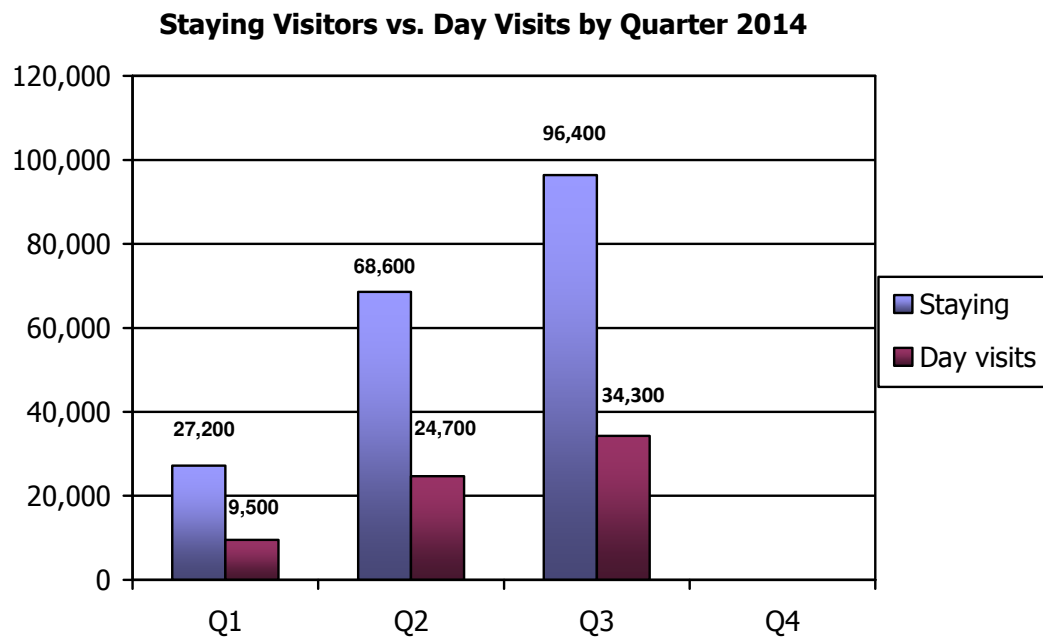


Over Q1, visitor departures increased by 7.8% in January, and decreased by 1.4% in February and by 5.9% in March. Over Q2, visitor departures increased by 0.6% in April, but decreased by 10.0% in May and by 5.4% in June. Over Q3, visitor departures increased by 9.5% in July, by 11.7% in August and by 8.4% in September.

Visitor Country of Residence by Quarter 2014



68.8% of visitors to Guernsey in Quarter 3 2014 were resident in the UK, with **11.0%** coming from Jersey and the remaining **20.2%** coming from other countries.

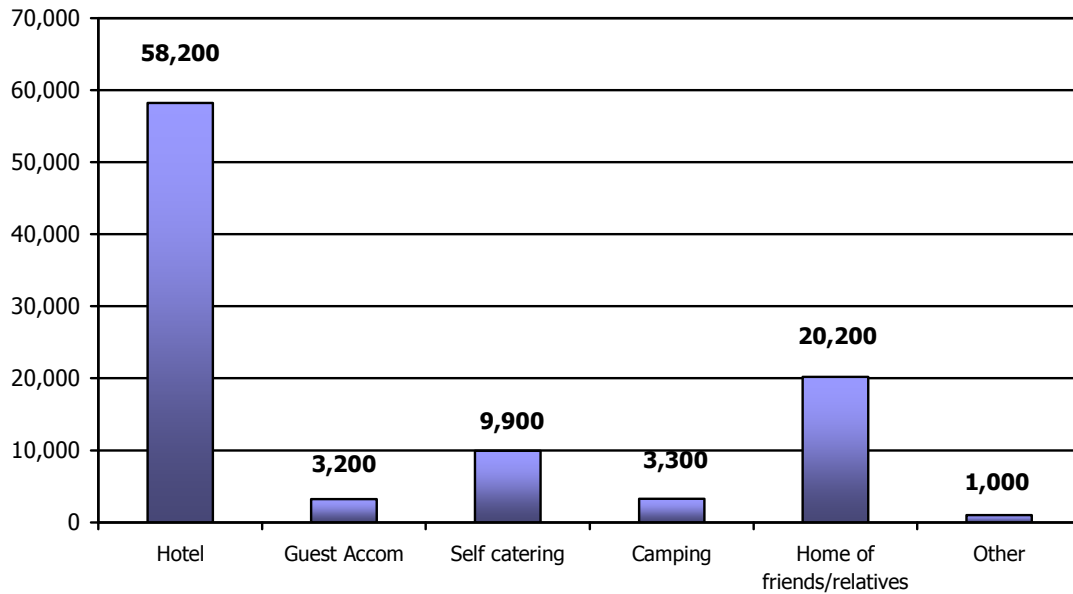


Compared to Quarter 3 2013, there has been a 6.9% increase in visitors staying in Guernsey for at least 1 night, and a 19.9% increase in day visits to Guernsey.

Cumulatively to the end of September, staying visitors have increased by 0.8% compared to 2013, while day visits have increased by 7.4%.

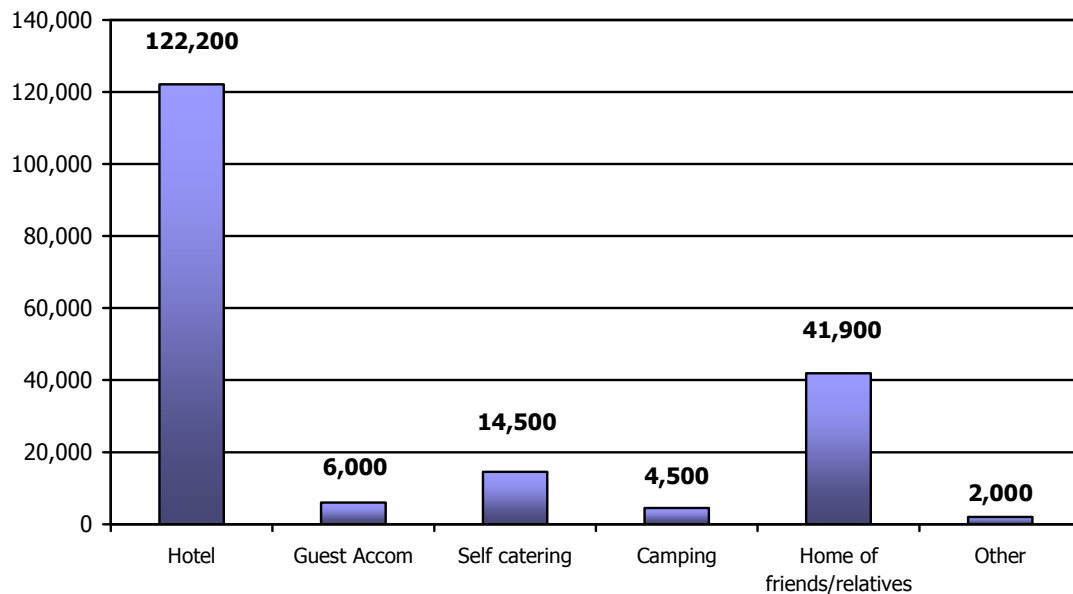
Accommodation used by Staying Visitors in Quarter 3 2014

Volume of Visitors by Accommodation Type Q3 2014



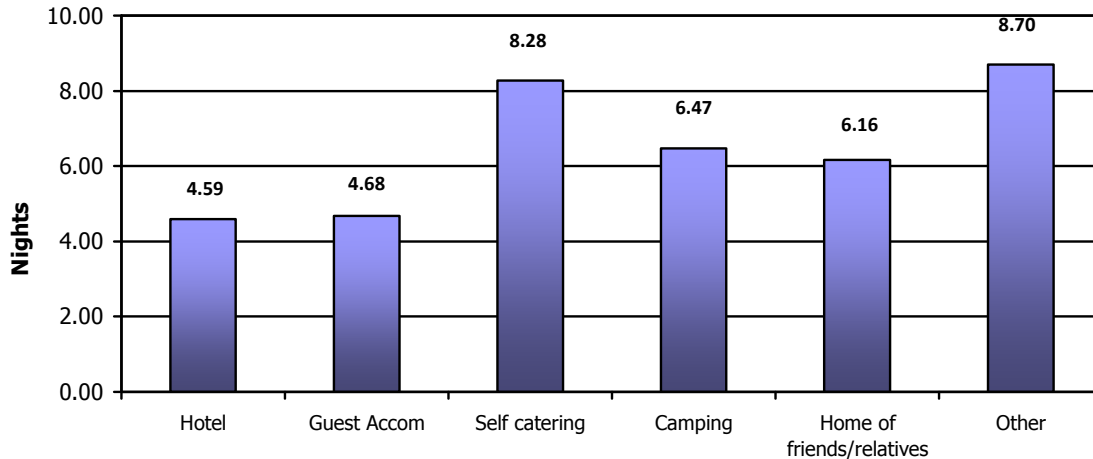
N.b. The above excludes long stay visitors (e.g. workers)

Visitors by Accommodation Type January to September 2014



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

Average Length of Stay by Accommodation Type Q3 2014



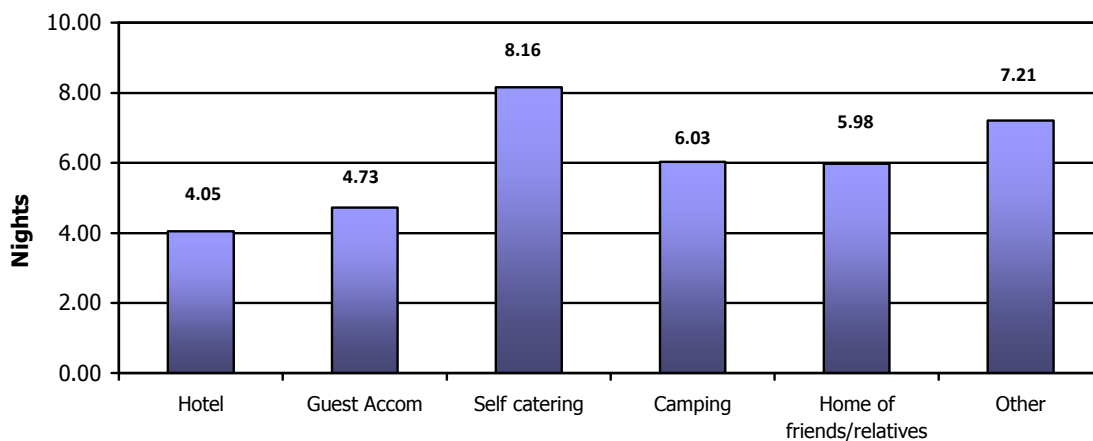
In total, there were **519,700** overnight stays in Guernsey in Quarter 3 2014 (+6.5%), with **386,500** bed nights sold in commercial accommodation (+12.9%).

The full breakdown was as follows:

Hotel bed nights:	267,500
Guest accommodation:	15,100
Self catering:	82,300
Camping:	21,500
Staying with friends/relatives:	124,100
Other	9,100

The overall average stay in Q3 for those spending at least a night in Guernsey was 5.42 nights, down very slightly from 5.44 nights in Q3 2013.

Average Length of Stay by Accommodation Type Jan to Sep 2014



Over the first 9 months of 2014, there were **933,800** overnight stays in Guernsey (+1.4%), with 669,100 bed nights sold in commercial accommodation (+4.7%).

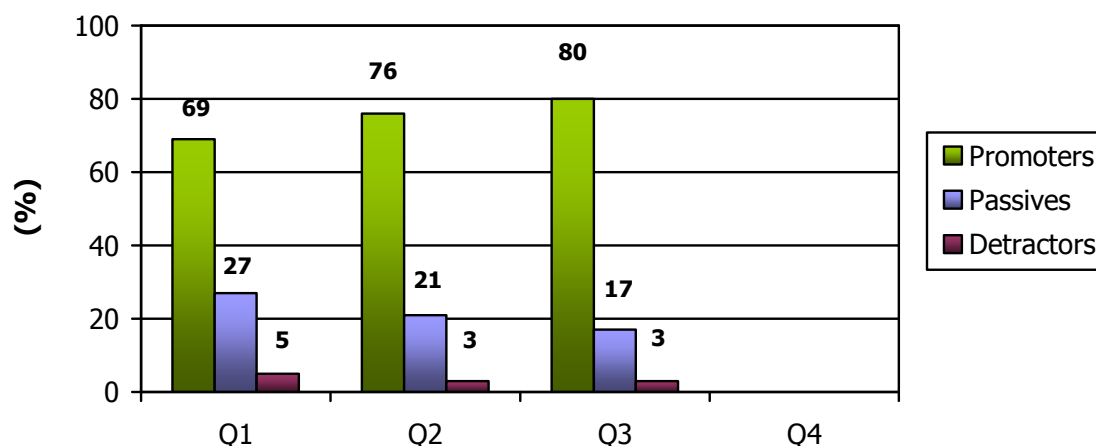
The full breakdown was as follows:

Hotel bed nights:	495,400
Guest accommodation:	28,300
Self catering:	118,500
Camping:	26,900
Staying with friends/relatives:	250,200
Other	14,600

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 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 score in Q3 2014 was 8.36, with the Net Promoter Score being 77.7.

The overall average up to September 2014 was 8.26, with the Net Promoter Score being 74.7.

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

	<u>Average Score</u>	<u>Net Promoter Score</u>
Overall	8.36	77.7
Staying leisure visitors	8.38	82.1
Leisure day visitors	8.59	70.0
Staying VFR	8.64	83.7
Staying business visitors	7.86	64.7
Business day visitors	7.93	61.2

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

	<u>Average Score</u>	<u>Net Promoter Score</u>
Overall	8.26	74.7
Staying leisure visitors	8.30	80.8
Leisure day visitors	8.64	74.2
Staying VFR	8.58	82.3
Staying business visitors	7.81	60.5
Business day visitors	7.85	54.7

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 2014, **22,400** (18.2%) of the 123,250 departing air passengers were flying to an onward final destination.

15,400 (27.9%) of the 55,250 Guernsey residents travelling by air were flying to an onward destination and **7,000** (10.3%) of the 68,000 visitors to Guernsey departing by air were flying to an onward destination.

The breakdown by route was as follows:

	<u>Visitor departures</u>	<u>Visitors travelling onward</u>	<u>Resident departures</u>	<u>Residents travelling onward</u>
Gatwick	21,090	2,660	23,490	11,390
Southampton	15,050	1,880	14,320	1,830
Manchester	7,330	120	2,720	280
East Midlands	4,070	0	1,200	80
Birmingham	2,950	270	770	160
Bristol	2,660	0	1,200	40
Exeter	2,330	40	1,030	140
Stansted	2,630	210	1,620	510
Other UK Air	840	10	150	0
TOTAL UK AIR	58,940	5,180	46,510	14,420
Jersey air	7,870	1,810	8,410	980
Foreign air	1,200	40	330	0
TOTAL AIR	68,010	7,030	55,250	15,400

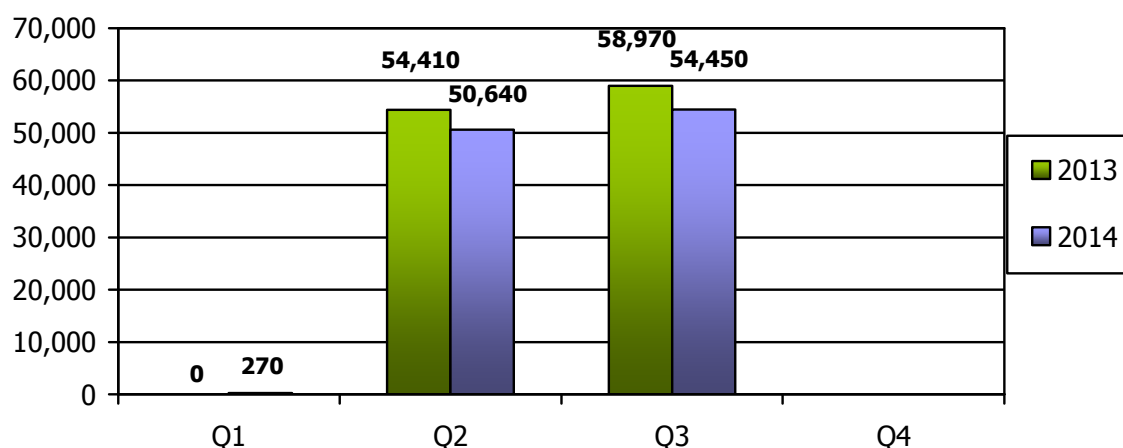
The main destinations/airports that passengers were travelling on to in Q3 were as follows:

1. Scottish airports	2,180 passengers	(1,330 visitors)
2. Spanish mainland	1,830 passengers	(170 visitors)
3. USA	1,440 passengers	(230 visitors)
4. Balearic Islands	1,220 passengers	(10 visitors)
5. Switzerland	1,210 passengers	(590 visitors)
6. Portugal (excl. Madeira)	1,110 passengers	(30 visitors)
7. English airports	1,070 passengers	(560 visitors)
8. Italy	1,040 passengers	(120 visitors)
9. Germany	960 passengers	(750 visitors)
10. Greece & Islands	850 passengers	(20 visitors)
11. France	850 passengers	(360 visitors)
12. Netherlands	760 passengers	(540 visitors)
13. Turkey	750 passengers	(10 visitors)
14. Canary Islands	700 passengers	(0 visitors)
15. Ireland	620 passengers	(340 visitors)
16. Northern Ireland	560 passengers	(290 visitors)
17. Canada	500 passengers	(300 visitors)
18. Sweden	350 passengers	(20 visitors)
19. Australia	320 passengers	(190 visitors)
20. Caribbean	300 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 Q3, the number of cruise passenger arrivals has fallen by **7.6%** compared to Q3 2013 and the cumulative total to the end of September has fallen by **7.1%** from 113,380 in 2013 to 105,360 in 2014.

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 22 cruise ships with a total of 25,650 passengers in 2013.

In June 2014, there were 20 cruise ships with a total of 22,390 passengers compared to 10 cruise ships with a total of 17,440 passengers in 2013.

In July 2014, there were 13 cruise ships with a total of 20,510 passengers compared to 12 cruise ships with a total of 19,980 passengers in 2013.

In August 2014, there were 17 cruise ships with a total of 23,710 passengers compared to 24 cruise ships with a total of 27,610 passengers in 2013.

In September 2014, there were 10 cruise ships with a total of 10,240 passengers compared to 10 cruise ships with a total of 11,370 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 third 2014 quarterly report on passenger departures between July and September (Q3 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 July and September 2014, **426 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 Q3 therefore comes from **9,296 interviews, representing 20,191 departing passengers (9.6% of Guernsey's total departing passengers, excluding the Alderney, Sark and Herm routes, over Q3 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 20,000 passengers provides a strong degree of statistical confidence in the results for Q3 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%
9,300	+/- 0.6	+/- 0.8	+/- 0.9	+/- 1.0	+/- 1.0
5,600	+/- 0.8	+/- 1.1	+/- 1.2	+/- 1.3	+/- 1.3
1,000	+/- 1.9	+/- 2.5	+/- 2.8	+/- 3.0	+/- 3.1
500	+/- 2.6	+/- 3.5	+/- 4.0	+/- 4.3	+/- 4.4

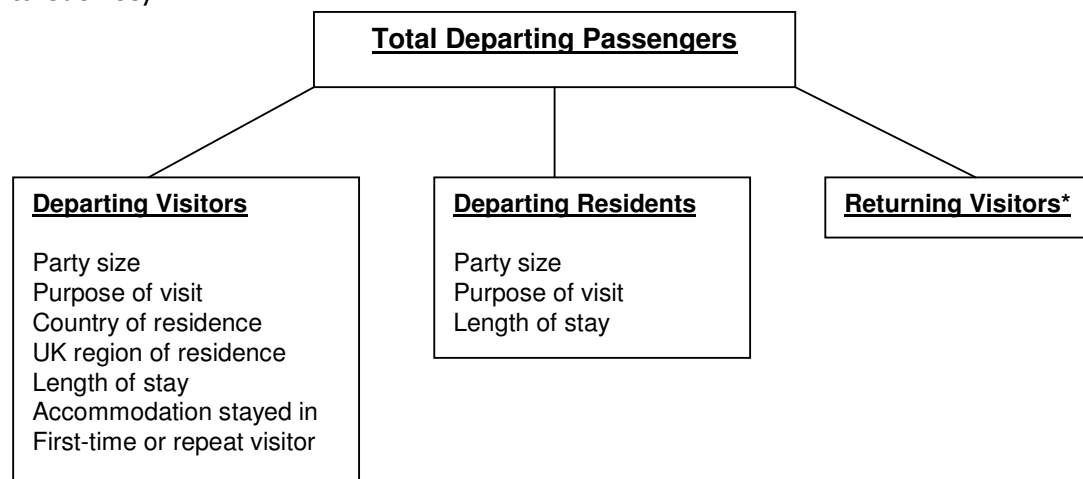
Based upon a total sample size from Q3 of 9,300, a finding that 62% of respondents were departing visitors would mean that the true figure for all respondents is 95% likely to be within the range 61.0% to 63.0%, but is more likely to be near the centre of this range (i.e. closer to the survey sample finding). For departing visitors, based upon a sub-sample size of 5,600, the finding that 50.9% were staying leisure visitors would have a statistical variation of between 49.6% and 52.2%. 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 **8.9%** in Q3 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:



***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 – September 2014 (including Alderney, Sark and Herm):

	<u>Volume</u>	<u>% of total pax.</u>	<u>2014 vs. 2013</u>
London Gatwick	119,000	19.6%	-9.7%
Southampton	69,700	11.5%	37.6%
Manchester	24,000	4.0%	-5.1%
Birmingham	9,200	1.5%	6.2%
Exeter	8,700	1.4%	2.2%
Bristol	9,200	1.5%	-7.4%
East Midlands	10,800	1.8%	-8.3%
Stansted	8,000	1.3%	10.1%
Other UK Air	1,300	0.2%	-3.9%
Total UK Air	259,800	42.8%	1.9%
Jersey	49,400	8.1%	-4.2%
Alderney	14,500	2.4%	-0.1%
Total CI Air	63,800	10.5%	-3.3%
Dinard	1,200	0.2%	-30.9%
Swiss Air	70	*	-38.1%
Other Foreign Air	2,400	0.4%	-15.3%
Total Foreign Air	3,600	0.6%	-21.7%
Total Air:	327,300	53.9%	0.5%
UK Sea	75,100	12.4%	5.6%
Jersey	46,500	7.7%	2.1%
Herm	70,550	11.6%	1.4%
Sark	46,800	7.7%	4.9%
Alderney	100	200	-59.0%
St. Malo	34,700	5.7%	5.2%
Other French Sea	6,400	1.1%	-15.3%
Total Sea:	280,150	46.1%	3.2%
Total Departures:	607,400		1.7%

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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