

2015 Travel Survey

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

RESEARCH REPORT ON Q4 2015

January 21st 2016

Table of Contents

	Page No.
Summary of Results	1
Survey Results	3
Breakdown of departing passengers	3
Visitor vs. resident departures 2015 vs. 2014	6
Visitors by air and sea 2015 vs. 2014	7
Visitor and resident departures by month 2015 vs. 2014	8
Purpose of visit by travel method 2015 vs. 2014	9
Visitors by country of residence	11
Staying visitors vs. day visits	11
Accommodation used by staying visitors	12
Average length of stay and bed nights by accommodation type	13
Recommendation of Guernsey	14
Onward flights	15
Cruise passengers	16
Visiting pleasure craft	17
Appendices	18
Background and Aims	18
Methodology	18
Interview shifts and achieved sample size	19
Statistical reliability and bias	19
Survey outputs	20
Total passenger departures 2015 vs. 2014	21
Definitions	22
Fieldwork, interviewers & quality control	22
Data preparation & processing	22

Summary of Results for Q4

	<u>2014</u>	<u>2015</u>	<u>% change</u>
Total departing passengers	122,900	117,600	-4.3%
Total departing visitors	49,300	44,600	-9.4%
Departing visitors by air	37,200	35,700	-4.0%
Departing visitors by sea	12,100	8,900	-26.2%
Staying leisure visitors	16,600	14,100	-15.1%
Visiting friends and relatives	12,300	13,900	+13.0%
Staying business / conference	9,100	8,300	-8.2%
Leisure day visits	3,500	1,800	-49.5%
Business day visits	4,400	3,100	-29.0%
Total for the above purposes of visit *	45,850	41,200	-10.2%
Total staying visitors	38,600	36,700	-4.9%
Average length of stay **	4.30 nights	4.39 nights	+2.1%
Total overnight stays (bed nights) **	164,400	160,100	-2.6%
Total staying in commercial accommodation	27,300	24,100	-11.6%
Average stay in commercial accommodation	3.83 nights	3.89 nights	+1.6%
Bed nights in commercial accommodation	104,400	93,800	-10.2%
Day visits	10,700	7,900	-25.7%
UK visitors	37,100	35,000	-5.7%
Jersey visitors	6,500	4,200	-35.1%
Other nationalities	5,700	5,500	-4.7%
Cruise ship passengers ***	1,700	2,490	+46.4%
Visiting yachtsmen ***	510	410	-19.8%
Departing Guernsey residents	73,300	72,900	-0.6%
Departing residents by air	62,000	64,200	+3.5%
Departing residents by sea	11,300	8,700	-23.1%
Net Promoter Score	59%	48%	

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 December

	<u>2014</u>	<u>2015</u>	<u>% change</u>
Total departing passengers	598,400	586,600	-2.0%
Total departing visitors	310,000	294,300	-5.1%
Departing visitors by air	188,900	185,400	-1.8%
Departing visitors by sea	121,100	108,900	-10.1%
Staying leisure visitors	136,050	130,050	-4.4%
Visiting friends and relatives	56,200	65,850	+17.2%
Staying business / conference	36,000	33,500	-6.9%
Leisure day visits	40,050	25,100	-37.4%
Business day visits	21,600	13,100	-39.3%
Total for the above purposes of visit *	289,900	267,500	-7.7%
Total staying visitors	230,700	232,500	+0.8%
Average length of stay **	4.79 nights	4.88 nights	+1.9%
Total overnight stays (bed nights) **	1,098,300	1,129,000	+2.8%
Total staying in commercial accommodation	174,400	171,600	-1.6%
Average stay in commercial accommodation	4.43 nights	4.51 nights	+1.8%
Bed nights in commercial accommodation	773,450	774,500	+0.1%
Day visits	79,250	61,800	-22.0%
UK visitors	216,400	215,500	-0.4%
Jersey visitors	35,200	27,300	-22.3%
Other nationalities	58,400	51,400	-11.9%
Cruise ship passengers ***	107,040	123,050	+15.0%
Visiting yachtsmen ***	16,510	19,560	+18.4%
Departing Guernsey residents	287,200	291,600	+1.5%
Departing residents by air	222,400	226,500	+1.8%
Departing residents by sea	64,700	65,100	+0.6%
Net Promoter Score	72%	54%	

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

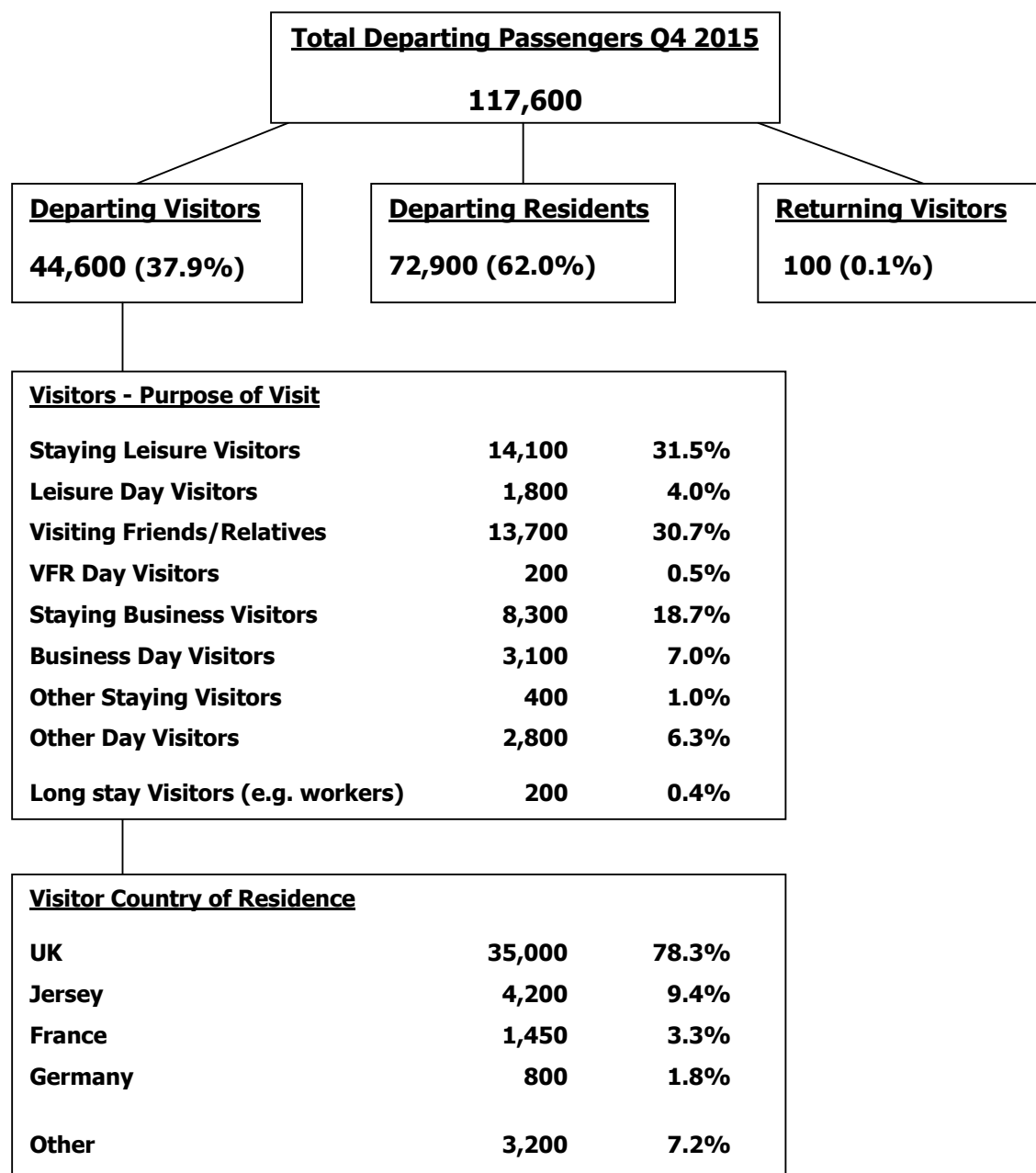
*** These figures exclude "Other staying", "Other day" and "Long stay" visitors as shown in the breakdown on page 2 and as defined in the appendices.**

**** 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.**

Q4 Survey Results – Excluding Alderney, Sark and Herm Departures

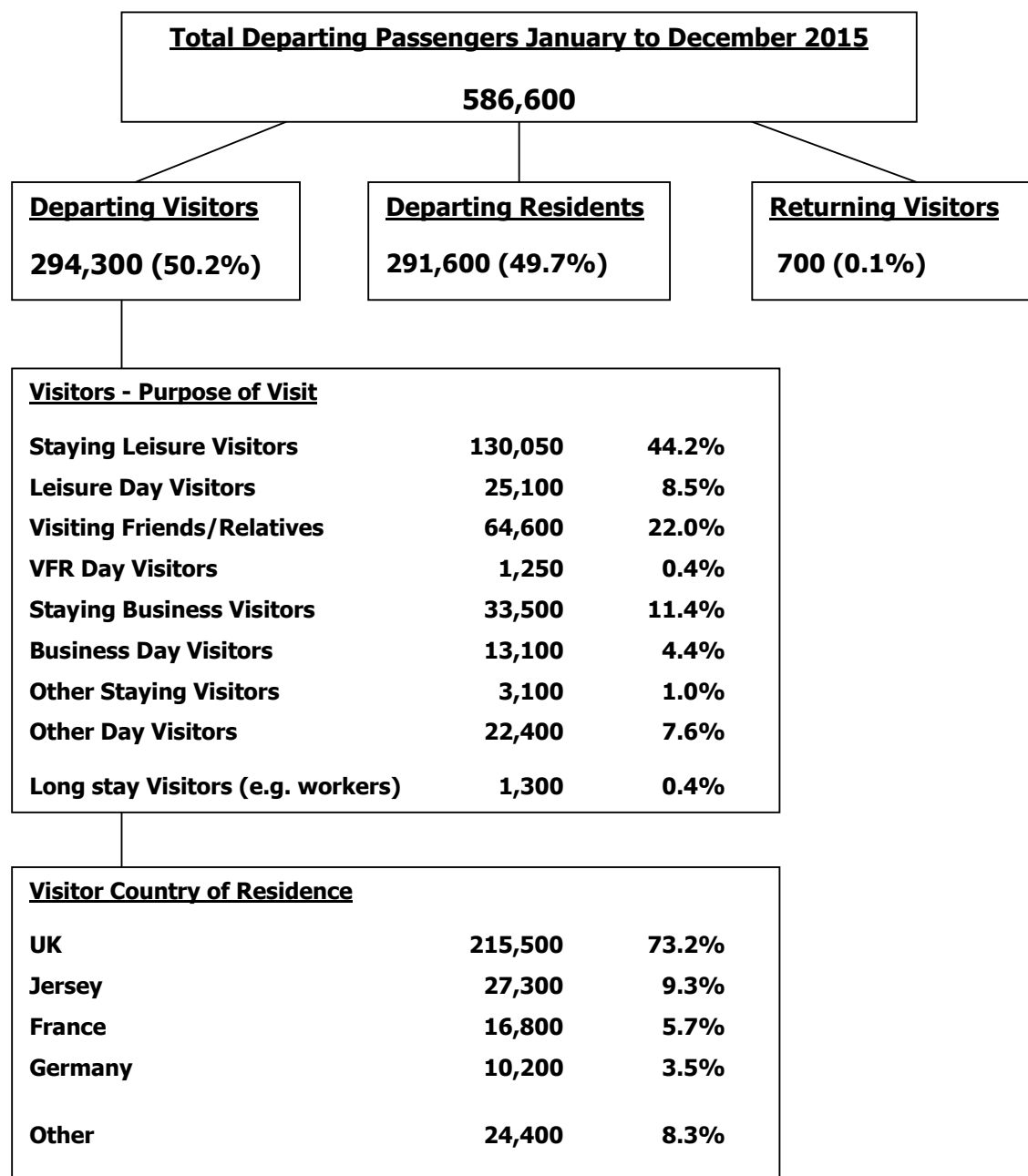
Excluding the Alderney, Sark and Herm routes, the passenger numbers for the **fourth quarter** of 2015 were broken down as follows:



In addition to the above, there were **2,490 passengers on cruise ships** and **410 visiting yachtsmen** arriving in Guernsey over the period October to December.

Cumulative Survey Results – January to December

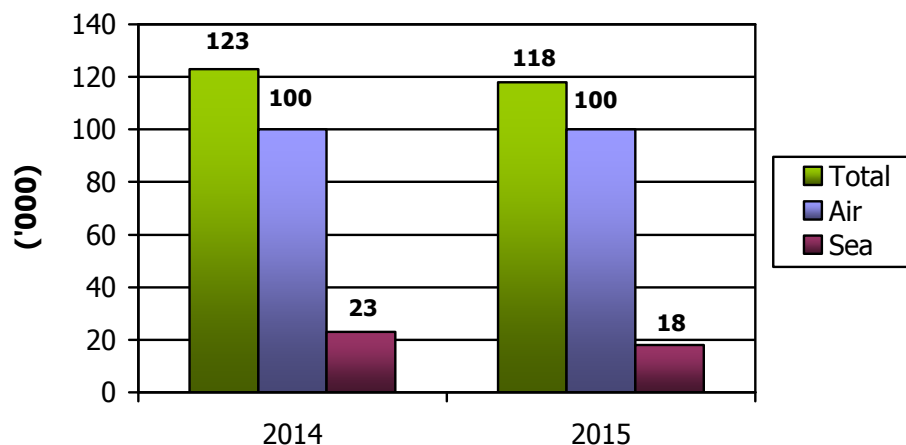
Excluding the Alderney, Sark and Herms routes, the passenger numbers for the **whole of 2015** were broken down as follows:



In addition to the above, there have been **123,050 passengers on cruise ships** and **19,560 visiting yachtsmen** arriving in Guernsey over the whole of 2015.

Comparisons with 2014

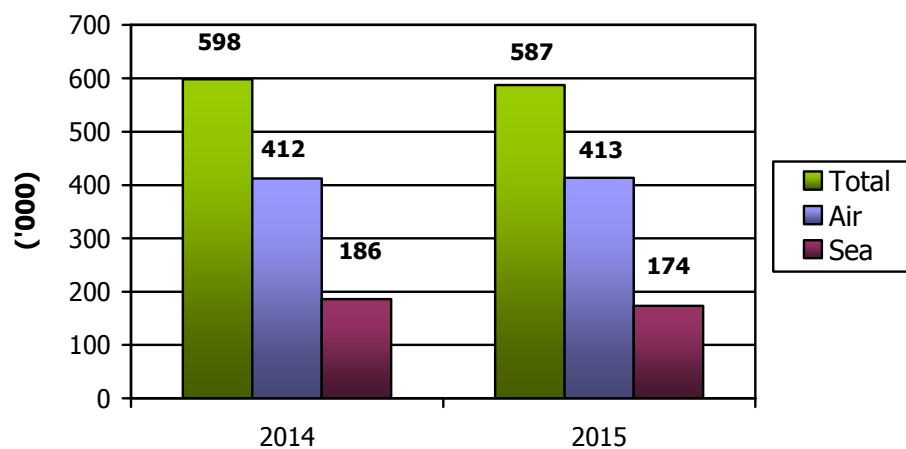
Passenger Departures Q4 2014 and 2015



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

Compared to Quarter 4 2014, there has been a 4.3% decrease in passenger departures from Guernsey, with a 0.5% increase in passenger departures by air and a 24.7% decrease in passenger departures by sea.

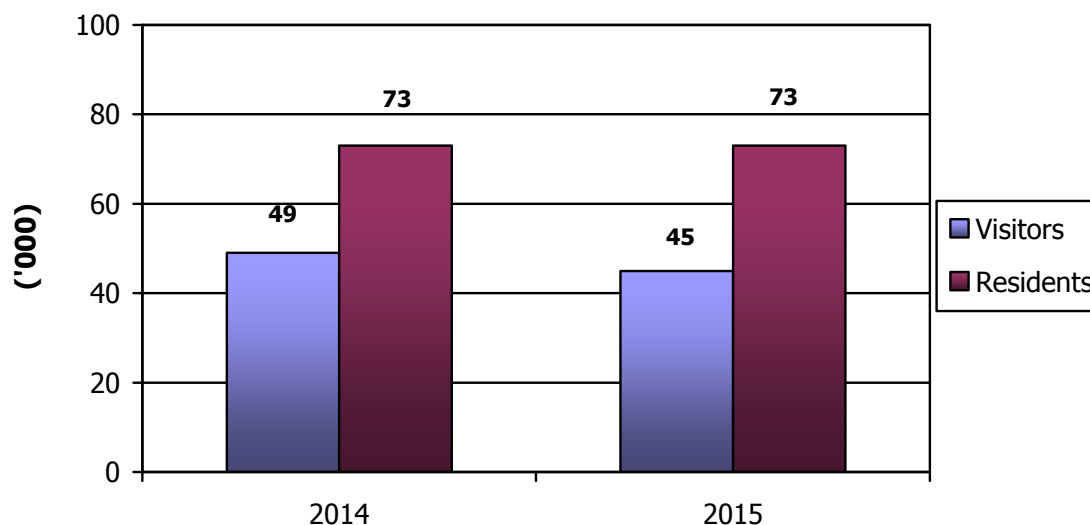
Passenger Departures January to December 2014 and 2015



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

Compared to the whole of 2014, there has been a 2.0% decrease in passenger departures from Guernsey, with a 0.05% increase in passenger departures by air and a 6.5% decrease in passenger departures by sea.

Visitors vs. Residents Q4 2014 and 2015



Excluding travel from within the Bailiwick, there were **44,600 visitor departures** between October and December 2015 and **72,900 resident departures**.

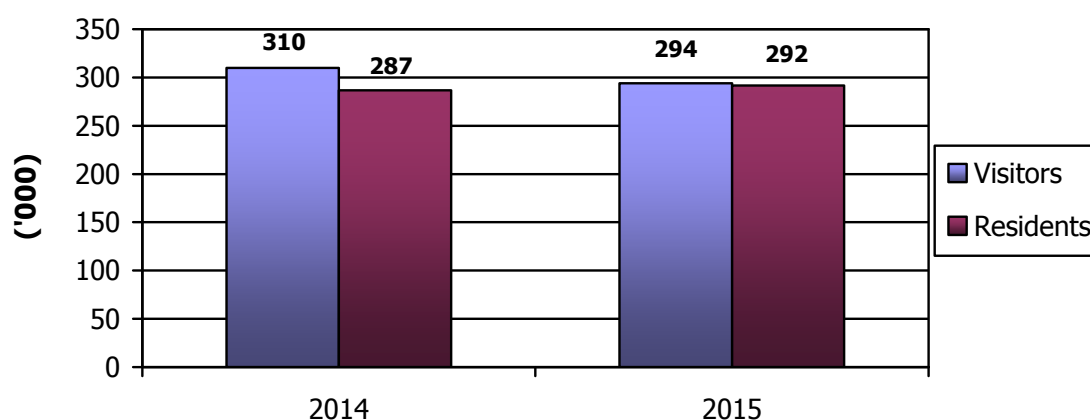
Visitor departures have **decreased overall by 9.4%** compared to Quarter 4 2014.

Excluding "returning visitors", 38.0% of departing passengers in Quarter 4 2015 were visitors to Guernsey, compared to 40.2% over the same period in 2014.

For air passengers, 35,700 (35.7%) were departing visitors and 64,200 were departing residents.

For sea passengers, 8,900 (50.6%) were departing visitors and 8,700 were departing residents.

Visitors vs. Residents January to December 2014 and 2015



Excluding travel from within the Bailiwick, there were **294,300 visitor departures** between January and December 2015 and **291,600 resident departures**.

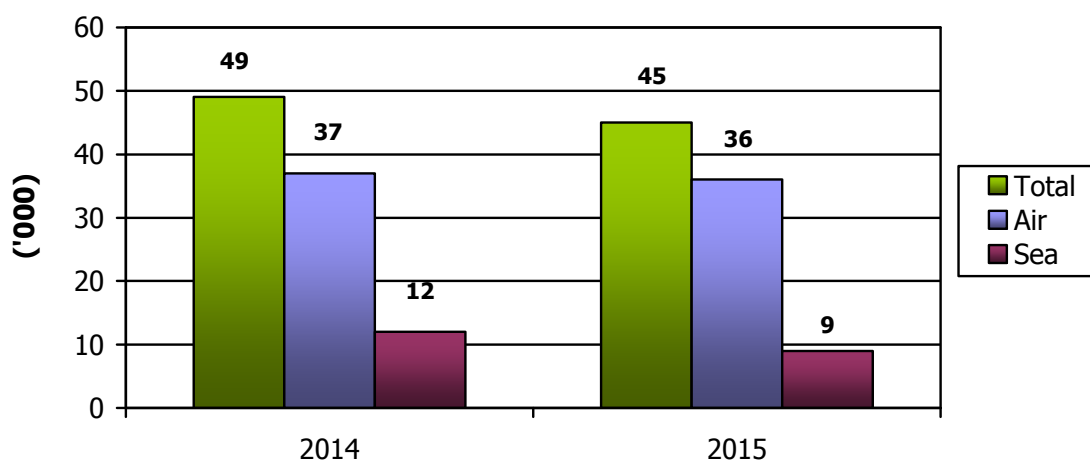
Visitor departures have **decreased overall by 5.1%** compared to the same period in 2014.

Excluding the 700 "returning visitors", 50.2% of departing passengers over the whole of 2015 were visitors to Guernsey, compared to 51.9% over the same period in 2014.

For air passengers, 185,400 (44.9%) were departing visitors and 226,500 were departing residents.

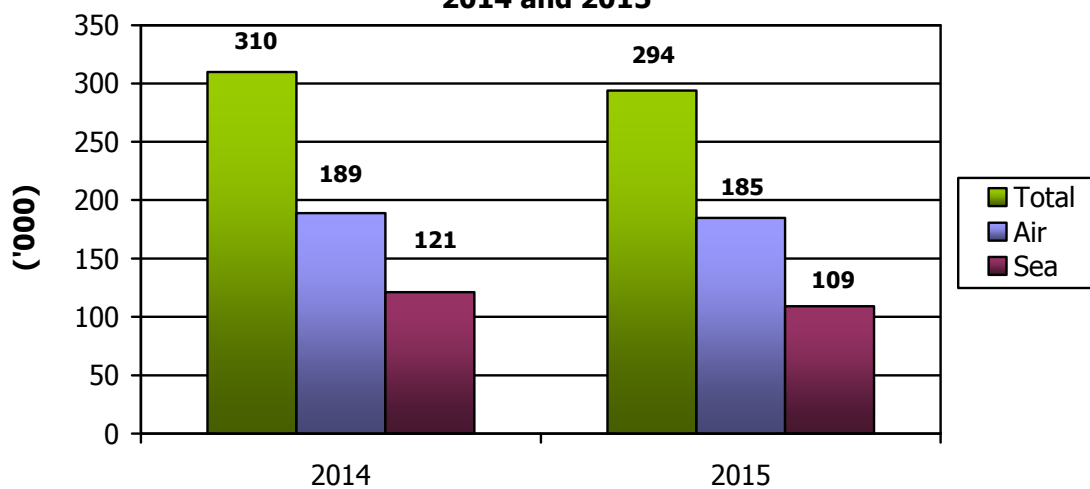
For sea passengers, 108,900 (62.6%) were departing visitors and 65,100 were departing residents.

Visitor Volumes by Travel Method Q4 2014 and 2015



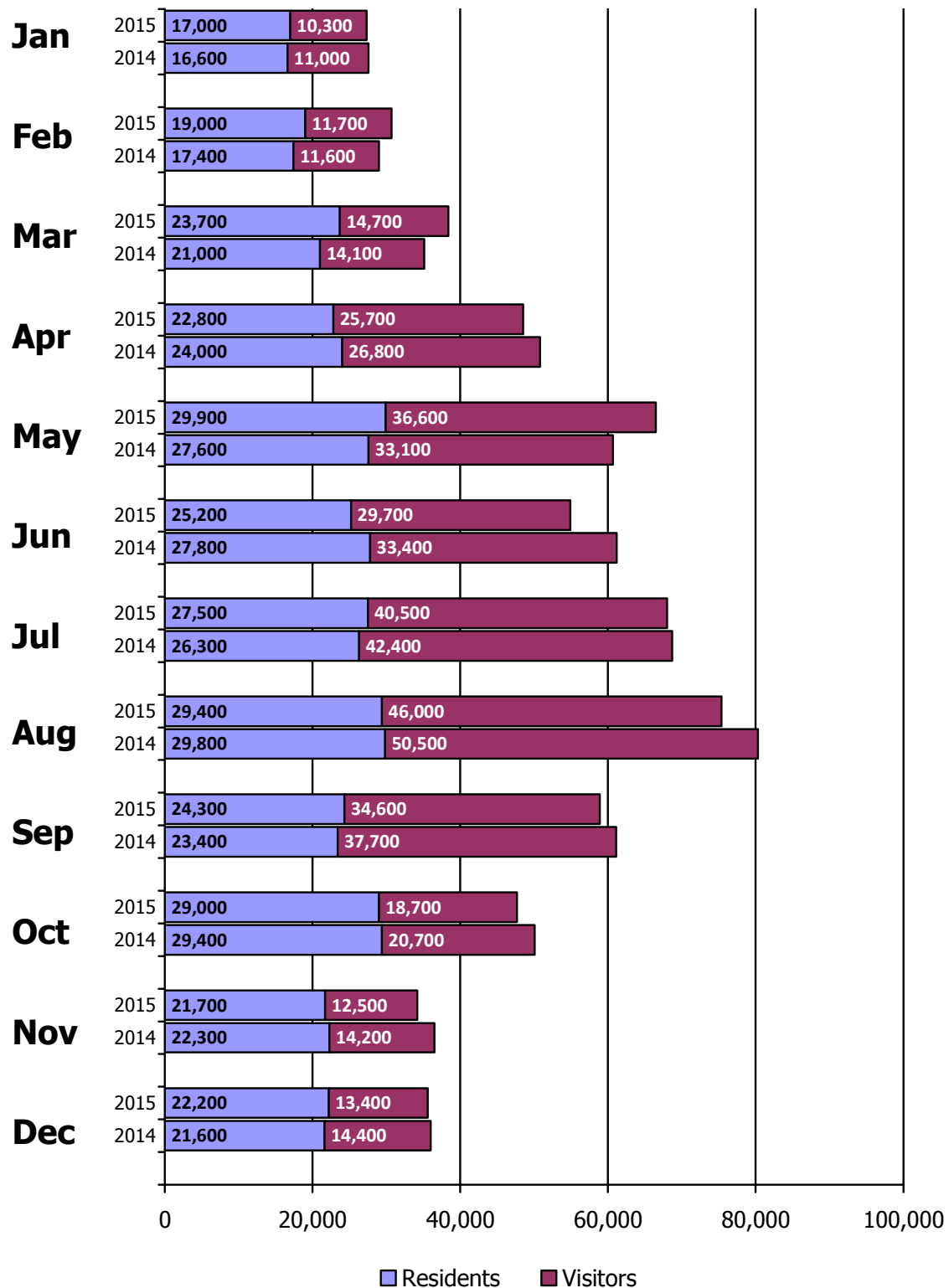
Compared to Quarter 4 2014, there has been a 4.0% decrease in visitors to Guernsey by air and a 26.2% decrease in visitors by sea.

January-December Visitor Volumes by Travel Method 2014 and 2015



Compared to the whole of 2014, there has been a 1.8% decrease in visitors to Guernsey by air and a 10.1% decrease in visitors by sea.

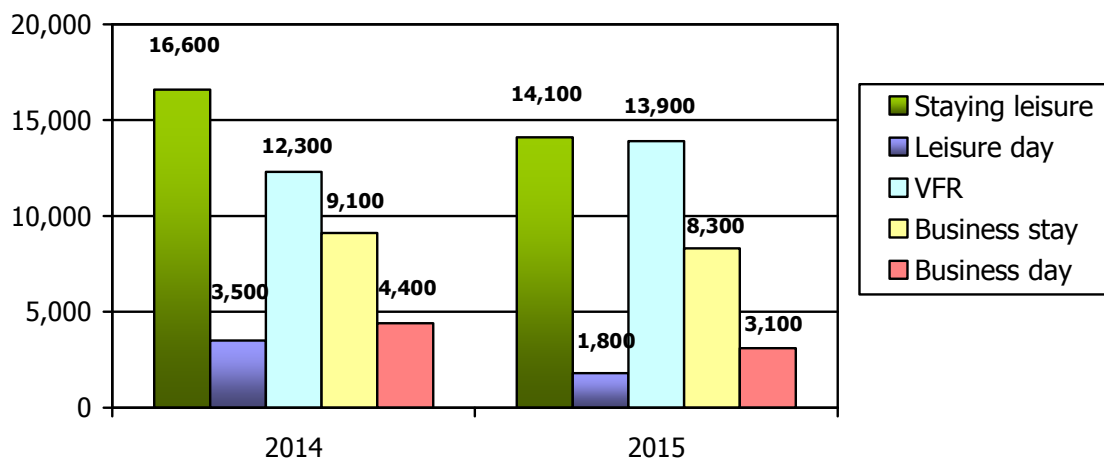
Visitor and Resident Departures by Month 2014 and 2015



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. Over Q4, visitor departures decreased by 10.0% in October, decreased by 11.7% in November, and decreased by 6.4% in December.

Visitors by Purpose of Visit and Travel Method

Visitor Volumes by Visit Purpose Q4 2014 and 2015



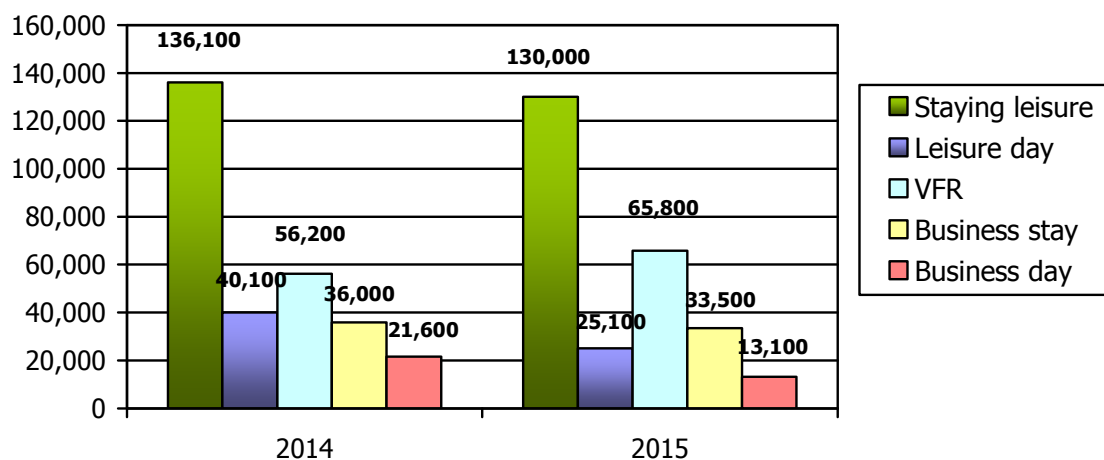
Compared to Quarter 4 2014, there has been a 13.0% increase in those visiting friends and relatives in Guernsey. Staying leisure visitors have fallen by 15.1%, leisure day visits have fallen by 49.5%, staying business/conference visitors have fallen by 8.2% and business day visits have fallen by 29.0%.

Breakdown by air and sea – Q4 2014 vs. Q4 2015:

	<u>Air</u>			<u>Sea</u>		
	2014	2015	% change	2014	2015	% change
Staying Leisure Visitors	10,460	10,030	-4.2%	6,100	4,040	-33.8%
Leisure Day visits	2,090	600	-71.4%	1,440	1,180	-18.0%
Staying VFR	10,570	11,990	13.4%	1,570	1,690	7.7%
VFR Day visits	120	140	18.9%	40	80	92.7%
Staying Business	7,260	7,260	0.0%	1,820	1,070	-41.2%
Business Day visits	4,030	2,950	-26.8%	350	160	-55.0%

Cumulative figures 2014 vs. 2015:

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

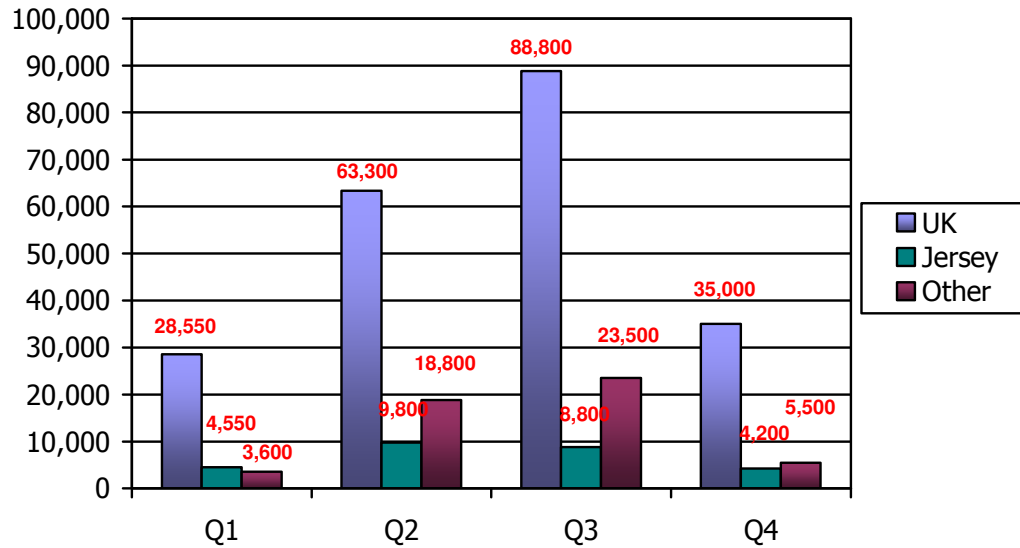


Compared to the whole of 2014, there has been a 17.2% increase in those visiting friends and relatives. Staying leisure visitors have fallen by 4.4%, staying business/conference visitors have fallen by 6.9%, leisure day visits have fallen by 37.4% and business day visits have fallen by 39.3%.

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

	<u>Air</u>			<u>Sea</u>		
	2014	2015	% change	2014	2015	% change
Staying Leisure Visitors	75,470	76,630	1.5%	60,580	53,420	-11.8%
Leisure Day visits	5,340	2,980	-44.2%	34,710	22,090	-36.4%
Staying VFR	46,130	53,400	15.8%	9,490	11,200	18.0%
VFR Day visits	420	570	37.3%	150	680	343.8%
Staying Business	30,230	26,420	-12.6%	5,740	7,060	23.0%
Business Day visits	20,270	12,060	-40.5%	1,320	1,040	-21.1%

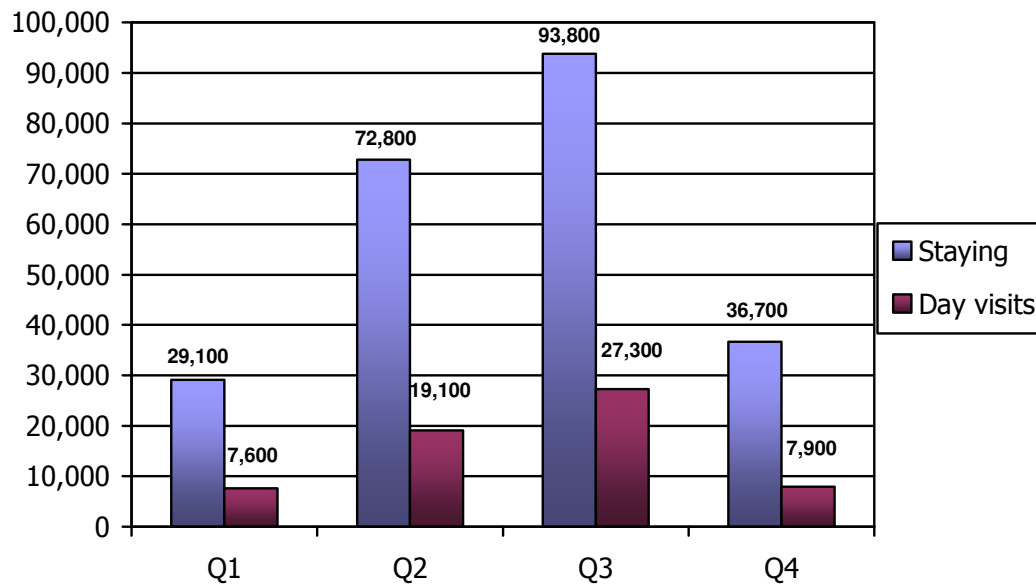
Visitor Country of Residence by Quarter 2015



78.3% of visitors to Guernsey in Quarter 4 2015 were resident in the UK, with **9.4%** coming from Jersey and the remaining **12.3%** coming from other countries.

Over the whole year, the number of UK visitors has decreased by 0.4%, the number of visitors from Jersey has decreased by 22.3% and the number of visitors from other markets has decreased by 11.9%.

Staying Visitors vs. Day Visits by Quarter 2015

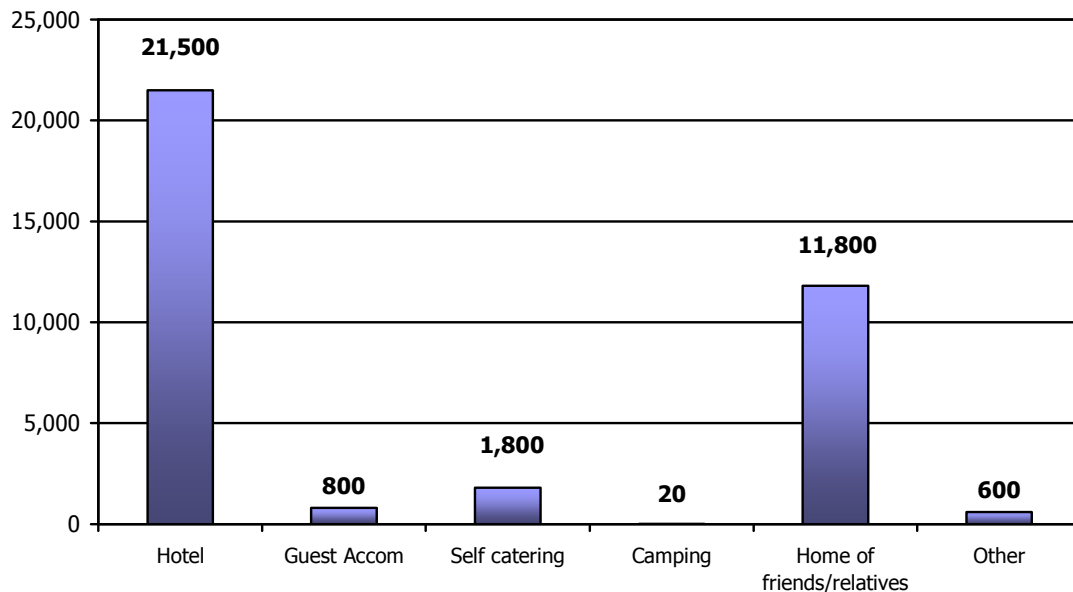


Compared to Quarter 4 2014, there has been a 4.9% decrease in visitors staying in Guernsey for at least 1 night, and a 25.7% decrease in day visits to Guernsey.

Over the whole year, staying visitors have increased by 0.8% compared to 2014, while day visits have decreased by 22.0%.

Accommodation used by Staying Visitors in Quarter 4 2015

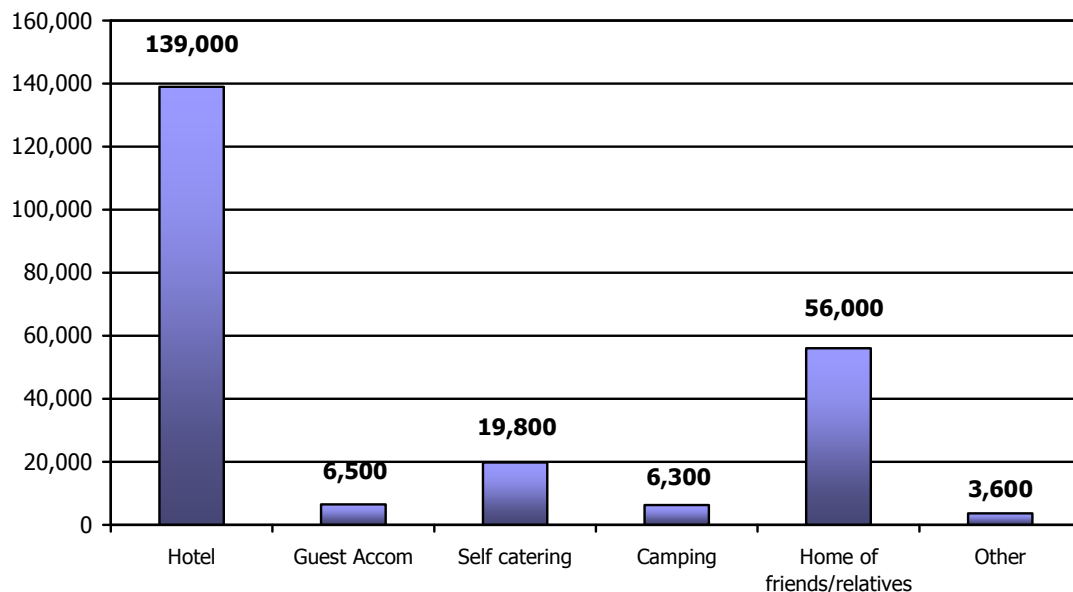
Volume of Visitors by Accommodation Type Q4 2015



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

Over Q4, the number of visitors staying in hotels has decreased by 12.9% and the number staying in guest accommodation has decreased by 13.9%, while the number of visitors staying in self catering has increased by 9.1% and the number of visitors staying with friends or relatives has increased by 14.1%.

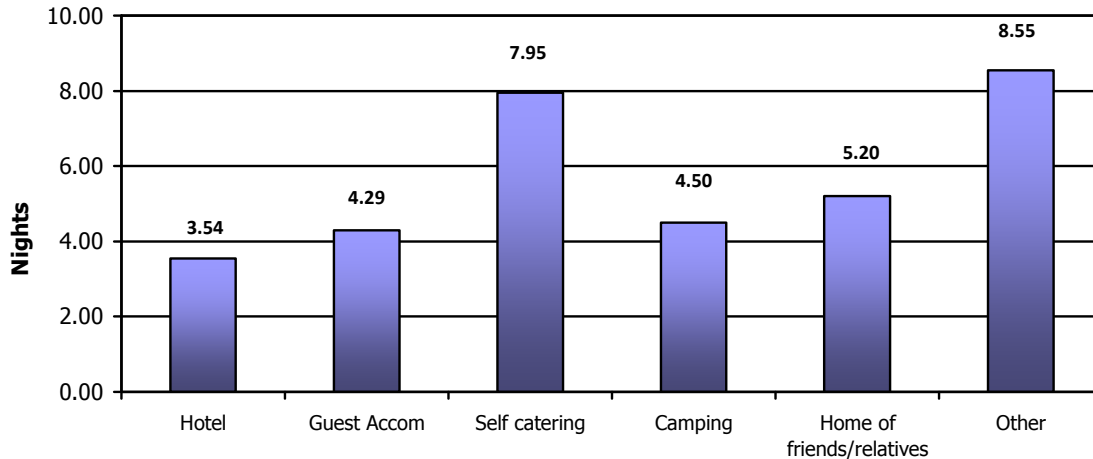
Visitors by Accommodation Type January to December 2015



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

Over the whole year, the number of visitors staying in hotels has decreased by 5.4% and the number staying in guest accommodation has decreased by 6.1%, while the number of visitors staying in self catering has increased by 22.3%, the number staying on campsites has increased by 41.4% and the number of visitors staying with friends or relatives has increased by 7.2%.

Average Length of Stay by Accommodation Type Q4 2015



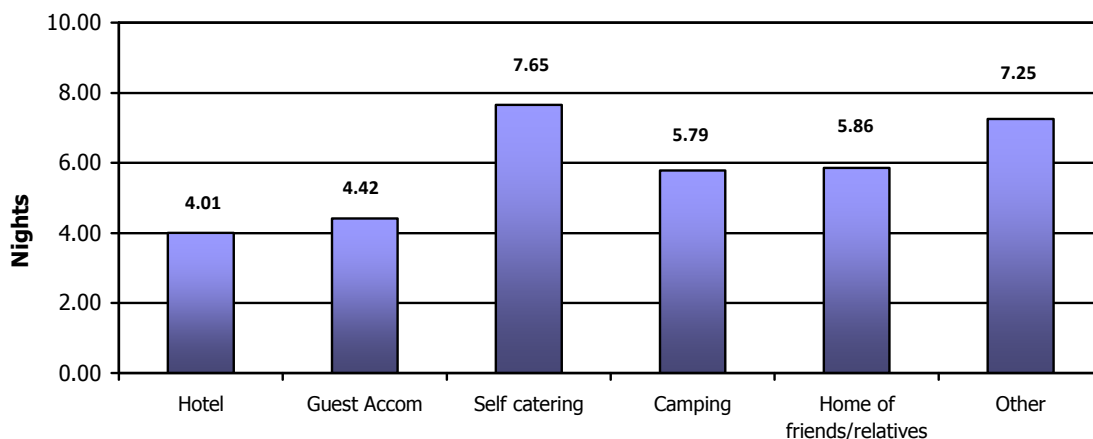
In total, there were **160,100** overnight stays in Guernsey in Quarter 4 2015 (-2.6%), with **93,800** bed nights sold in commercial accommodation (-10.2%).

The full breakdown was as follows:

Hotel bed nights:	76,000
Guest accommodation:	3,400
Self catering:	14,200
Camping:	100
Staying with friends/relatives:	61,500
Other	4,900

The overall average stay in Q4 for those spending at least a night in Guernsey was 4.39 nights, up from 4.30 nights in Q4 2015.

Average Length of Stay by Accommodation Type Jan to Dec 2015



Over the whole of 2015, there were **1,129,000** overnight stays in Guernsey (+2.8%), with 774,500 bed nights sold in commercial accommodation (+0.1%).

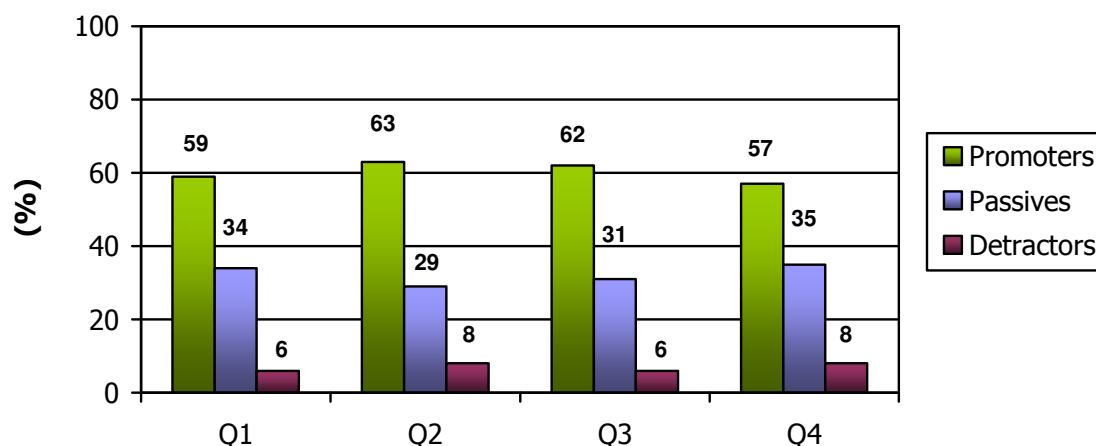
The full breakdown was as follows:

Hotel bed nights:	558,100
Guest accommodation:	28,700
Self catering:	151,300
Camping:	36,500
Staying with friends/relatives:	328,400
Other	26,200

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 score in Q4 2015 was 8.57, with the Net Promoter Score being 48.1.

The overall average score in 2015 was 8.72, with the Net Promoter Score being 53.9.

The Q4 results broken down by purpose of visit were as follows:

	<u>Average Score</u>	<u>Net Promoter Score</u>
Overall	8.57	48.1
Staying leisure visitors	8.86	60.2
Leisure day visitors	8.16	30.2
Staying VFR	9.00	63.4
Staying business visitors	8.37	38.6
Business day visitors	7.95	25.6

The results for the whole of 2015 broken down by purpose of visit were as follows:

	<u>Average Score</u>	<u>Net Promoter Score</u>
Overall	8.72	53.9
Staying leisure visitors	8.95	62.7
Leisure day visitors	8.13	31.2
Staying VFR	9.09	67.0
Staying business visitors	8.45	43.3
Business day visitors	8.06	29.3

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 October to December 2015, **17,460** (17.4%) of the 100,050 departing air passengers were flying to an onward final destination.

13,710 (21.3%) of the 64,240 Guernsey residents travelling by air were flying to an onward destination and **3,750** (10.5%) of the 35,720 visitors to Guernsey departing by air were flying to an onward destination.

The breakdown for Q4 by route was as follows:

	<u>Visitor departures</u>	<u>Visitors travelling onward</u>	<u>Resident departures</u>	<u>Residents travelling onward</u>
Gatwick	11,850	1,760	28,330	10,740
Southampton	6,200	560	11,660	1,190
Manchester	3,330	100	4,380	350
East Midlands	1,750	0	1,310	20
Birmingham	1,510	180	1,570	400
Bristol	1,240	30	1,340	40
Exeter	1,380	60	1,450	80
Stansted	1,540	30	1,160	200
London City	1,220	120	1,640	210
Other UK Air	90	0	0	0
TOTAL UK AIR	30,110	2,840	52,840	13,230
Jersey air	5,180	870	11,180	480
Foreign air	430	30	220	0
TOTAL AIR	35,720	3,750	64,240	13,710

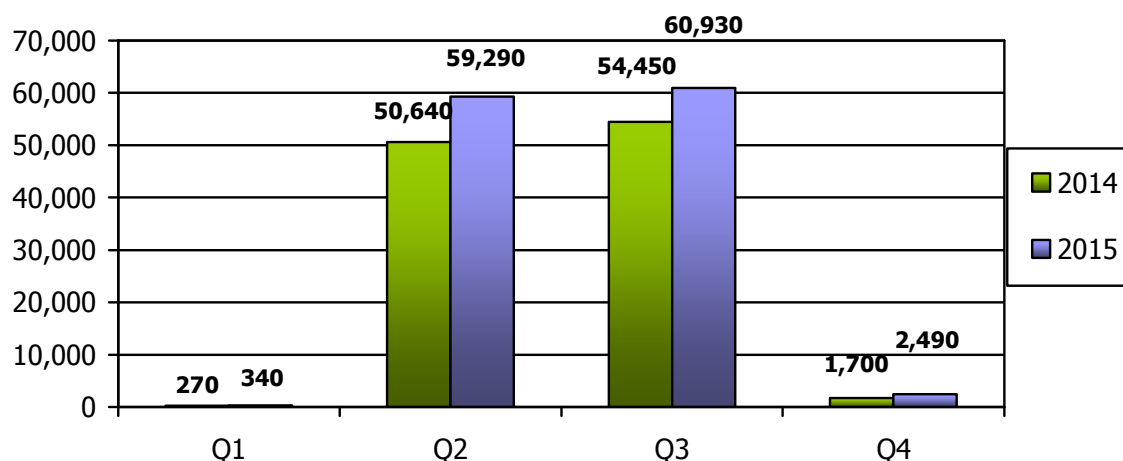
The main destinations/airports that passengers were travelling on to in Q4 were as follows:

1. Canary Islands	1,410 passengers	(30 visitors)
2. English airports	1,210 passengers	(670 visitors)
3. Scottish airports	1,180 passengers	(410 visitors)
4. Spanish mainland	1,140 passengers	(130 visitors)
5. Germany	1,100 passengers	(510 visitors)
6. Ireland	910 passengers	(210 visitors)
7. Italy	820 passengers	(50 visitors)
8. USA	780 passengers	(210 visitors)
9. Northern Ireland	700 passengers	(180 visitors)
10. Caribbean	610 passengers	(10 visitors)
11. Madeira	570 passengers	(0 visitors)
12. Netherlands	570 passengers	(240 visitors)
13. Finland	450 passengers	(0 visitors)
14. Switzerland	360 passengers	(120 visitors)
15. Portugal (excl. Madeira)	340 passengers	(40 visitors)
16. South Africa	300 passengers	(80 visitors)
17. Isle of Man	290 passengers	(200 visitors)
18. Turkey	280 passengers	(0 visitors)
19. Australia	270 passengers	(90 visitors)
20. Cyprus	270 passengers	(10 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 Q4, the number of cruise passenger arrivals has increased by **46.4%** compared to Q4 2014 and the cumulative total over the whole year has increased by **15.0%** from 107,040 in 2014 to 123,050 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.

Over Q4 2015 there were 2 cruise ship arrivals with 2,490 landed passengers in October compared to 2 cruise ships carrying 1,700 landed passengers in Q4 2014.

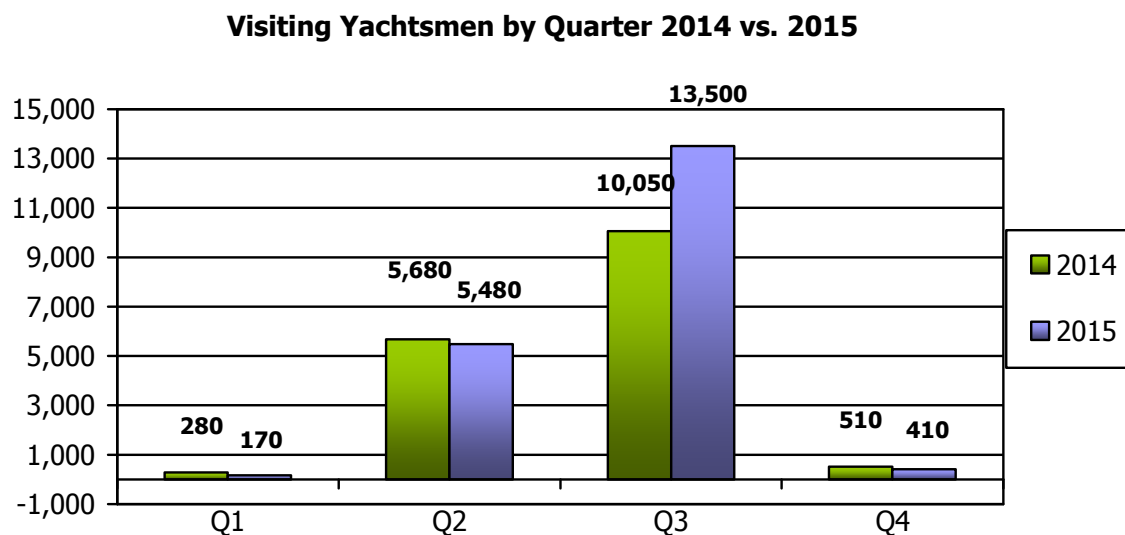
A new question was added to the survey in November 2014 asking visitors who had visited Guernsey previously whether they had ever visited before on a cruise.

From the 1,742 respondents who answered this question over Q4 2015, 20 said that they had previously visited on a cruise. This represents **1.1%** of previous visitors to Guernsey.

Over the whole of 2015, **0.6%** of those who had visited Guernsey previously had done so 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.



Over Q4 2015, the number of pleasure passenger arrivals was **410 (-19.8%)** compared to 510 in Q4 2014.

Cumulatively to the end of December, the number of pleasure passenger arrivals has **increased by 18.4% to 19,560**.

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 providing 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 were 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 fourth 2015 quarterly report on passenger departures between October and December (Q4 2015).

Methodology

As with previous exit surveys, face-to-face interviews were 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 October and December 2015, **301 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 Q4 therefore comes from **5,180 interviews, representing 10,060 departing passengers (8.5% of Guernsey's total departing passengers, excluding the Alderney, Sark and Herm routes, over Q4 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 10,000 passengers provides a strong degree of statistical confidence in the results for Q4 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%
5,200	+/- 0.8	+/- 1.1	+/- 1.2	+/- 1.3	+/- 1.4
2,200	+/- 1.3	+/- 1.7	+/- 1.9	+/- 2.0	+/- 2.1
1,000	+/- 1.9	+/- 2.5	+/- 2.8	+/- 3.0	+/- 3.1
500	+/- 2.6	+/- 3.5	+/- 4.0	+/- 4.3	+/- 4.4

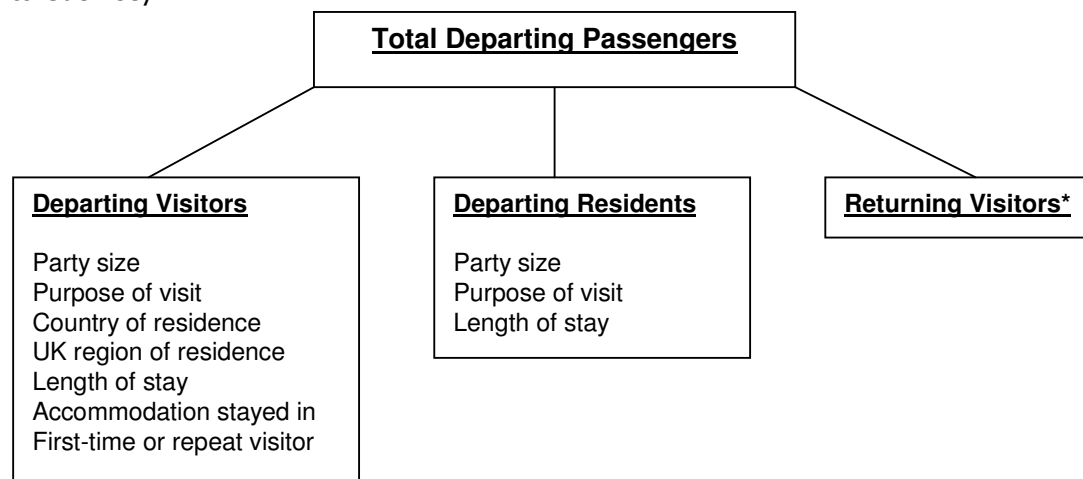
Based upon a total sample size from Q4 of 5,180, a finding that 37.9% of respondents were departing visitors would mean that the true figure for all respondents is 95% likely to be within the range 36.6% to 39.2%, but is more likely to be near the centre of this range (i.e. closer to the survey sample finding). For departing visitors, based upon a sub-sample size of 2,200, the finding that 31.5% were staying leisure visitors would have a statistical variation of between 29.6% and 33.4%. 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 **8.1%** in Q4 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 – December 2015 (including Alderney, Sark and Herm):

	<u>Volume</u>	<u>% of total pax.</u>	<u>2015 vs. 2014</u>
London Gatwick	159,200	22.0%	1.0%
Southampton	70,860	9.8%	-21.5%
Manchester	34,080	4.7%	7.3%
East Midlands	15,590	2.1%	16.2%
Birmingham	14,000	1.9%	15.8%
Stansted	13,350	1.8%	28.9%
Exeter	12,370	1.7%	8.7%
Bristol	12,020	1.7%	2.3%
London City	11,640	1.6%	370%
Other UK Air	670	0.1%	-22.3%
Total UK Air	343,780	47.5%	0.5%
Jersey	63,790	8.8%	-3.7%
Alderney	18,160	2.5%	-2.6%
Total CI Air	81,950	11.3%	-3.4%
Dinard	1,320	0.2%	-14.4%
Swiss Air	160	*	95.1%
Other Foreign Air	3,510	0.5%	37.5%
Total Foreign Air	4,990	0.7%	19.4%
Total Air:	430,720	59.5%	-0.1%
UK Sea	76,190	10.5%	-13.0%
Jersey	50,830	7.0%	-4.5%
Herm	69,740	9.6%	-9.0%
Sark	48,880	6.8%	-2.8%
St. Malo	39,360	5.4%	1.3%
Other French Sea	7,620	1.1%	19.6%
Alderney	60	*	-28.7%
Total Sea:	292,680	40.5%	-6.5%
Total Departures:	723,400		-2.8%

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 by the fieldwork supervisor 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 and conducts random checks of the data input.

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 any potential outliers that may impact upon the results 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
Website: www.island-ark.com