

2015 Travel Survey

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

RESEARCH REPORT ON Q2 2015

July 17th 2015

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Summary of Results for Q2

	<u>2014</u>	<u>2015</u>	<u>% change</u>
Total departing passengers	173,100	169,800	-1.9%
Total departing visitors	93,300	91,900	-1.5%
Departing visitors by air	51,500	52,100	+1.3%
Departing visitors by sea	41,850	39,750	-5.0%
Staying leisure visitors	44,000	44,600	+1.4%
Visiting friends and relatives	12,850	17,250	+34.4%
Staying business / conference	10,800	9,500	-12.0%
Leisure day visits	14,300	9,000	-37.0%
Business day visits	5,600	2,700	-51.6%
Total for the above purposes of visit *	87,600	83,100	-5.1%
Total staying visitors	68,600	72,800	+6.2%
Average length of stay **	4.47 nights	4.66 nights	+4.3%
Total overnight stays (bed nights) **	305,000	337,600	+10.7%
Total staying in commercial accommodation	54,650	57,300	+4.8%
Average stay in commercial accommodation	4.16 nights	4.42 nights	+6.2%
Bed nights in commercial accommodation	227,400	253,200	+11.3%
Day visits	24,750	19,050	-23.0%
UK visitors	62,500	63,300	+1.2%
Jersey visitors	10,600	9,800	-7.9%
Other nationalities	20,200	18,800	-6.6%
Cruise ship passengers ***	50,640	59,290	+17.1%
Visiting yachtsmen ***	5,680	5,480	-3.6%
Departing Guernsey residents	79,400	77,800	-2.1%
Departing residents by air	55,700	53,600	-3.8%
Departing residents by sea	23,700	24,200	+2.1%
Net Promoter Score	73.1%	55.2%	

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 June

	<u>2014</u>	<u>2015</u>	<u>% change</u>
Total departing passengers	264,900	266,500	+0.6%
Total departing visitors	130,000	128,600	-1.1%
Departing visitors by air	83,600	82,850	-0.9%
Departing visitors by sea	46,400	45,700	-1.4%
Staying leisure visitors	53,000	54,400	+2.6%
Visiting friends and relatives	21,800	28,600	+31.2%
Staying business / conference	19,650	17,100	-13.1%
Leisure day visits	16,600	10,200	-38.5%
Business day visits	11,800	7,600	-35.4%
Total for the above purposes of visit *	122,900	117,900	-4.0%
Total staying visitors	95,750	102,000	+6.5%
Average length of stay **	4.36 nights	4.49 nights	+3.0%
Total overnight stays (bed nights) **	414,150	456,100	+10.1%
Total staying in commercial accommodation	72,400	76,100	+5.1%
Average stay in commercial accommodation	3.90 nights	4.09 nights	+4.9%
Bed nights in commercial accommodation	282,600	311,100	+10.1%
Day visits	34,300	26,600	-22.4%
UK visitors	88,900	91,800	+3.2%
Jersey visitors	17,400	14,350	-17.6%
Other nationalities	23,700	22,400	-5.3%
Cruise ship passengers ***	50,910	59,630	+17.1%
Visiting yachtsmen ***	5,960	5,650	-5.2%
Departing Guernsey residents	134,400	137,500	+2.3%
Departing residents by air	105,100	106,750	+1.5%
Departing residents by sea	29,250	30,700	+5.0%
Net Promoter Score	71.5%	54.6%	

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

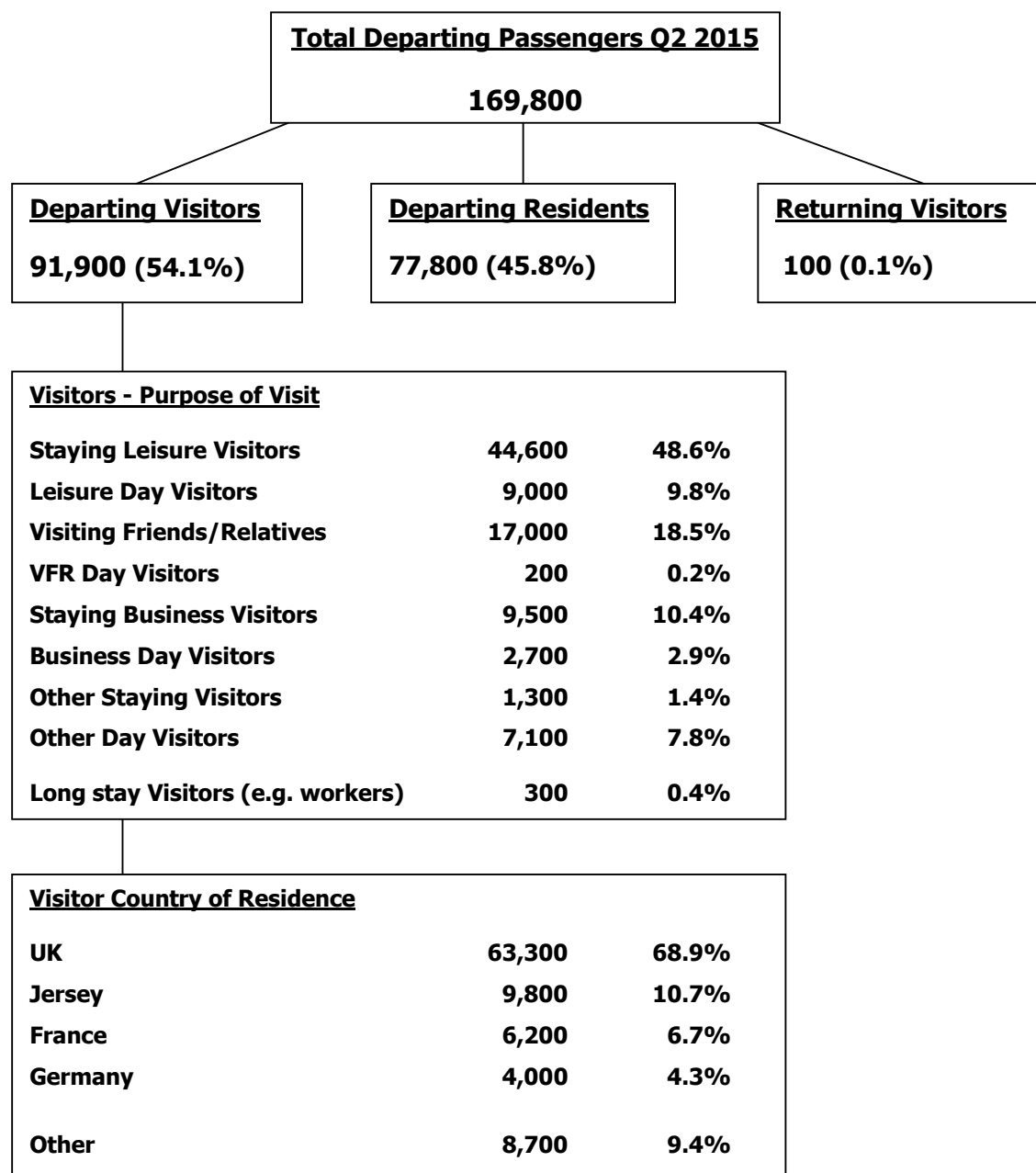
*** These figures exclude "Other staying", "Other day" and "Long stay" visitors as shown in the breakdown on page 2 and as defined in the appendices.**

**** 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.**

Q2 Survey Results – Excluding Alderney, Sark and Herm Departures

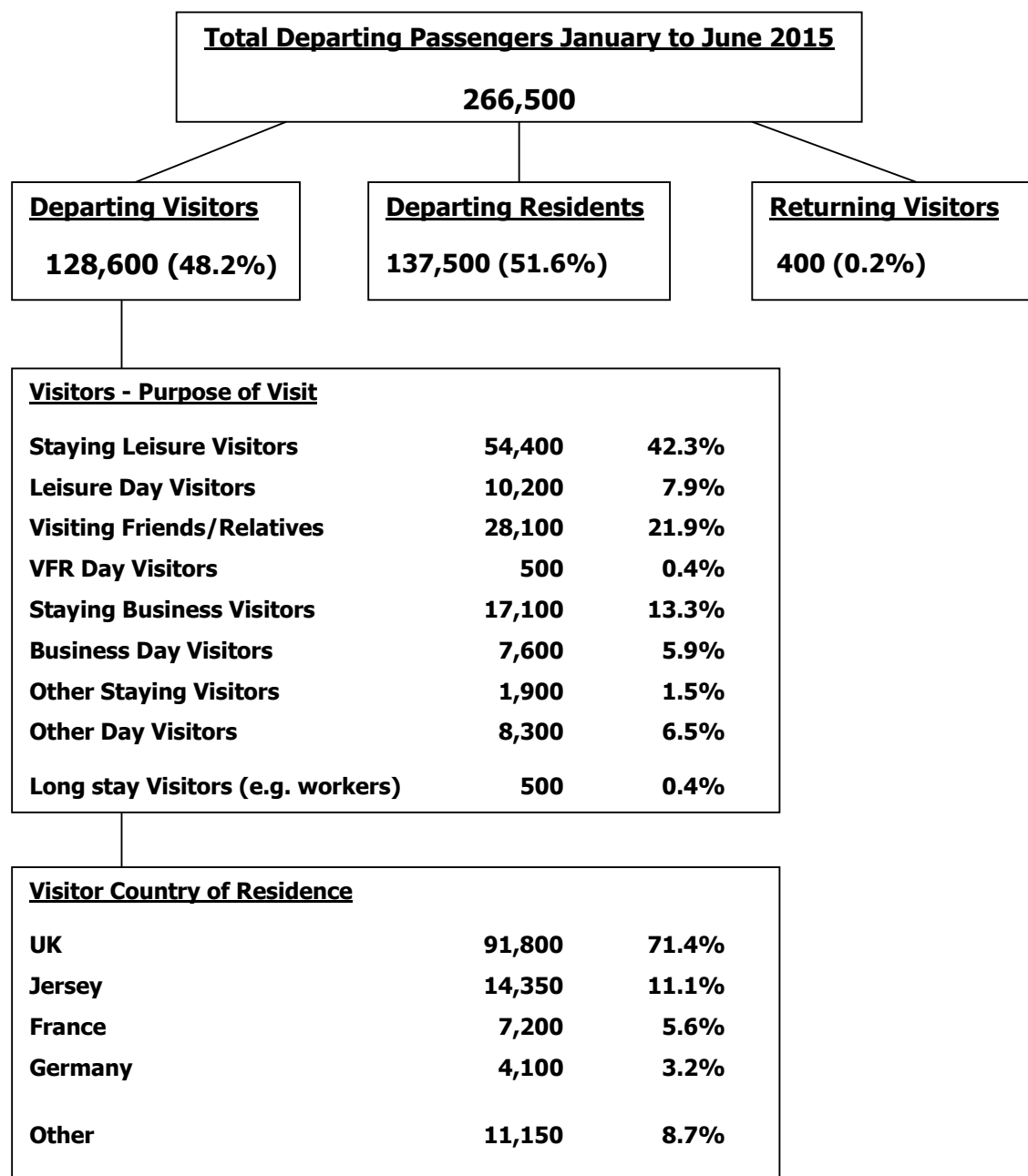
Excluding the Alderney, Sark and Herm routes, the passenger numbers for the **second quarter** of 2015 were broken down as follows:



In addition to the above, there were **59,285 passengers on cruise ships** and **5,476 visiting yachtsmen** arriving in Guernsey over the period April to June.

Cumulative Survey Results – January to June

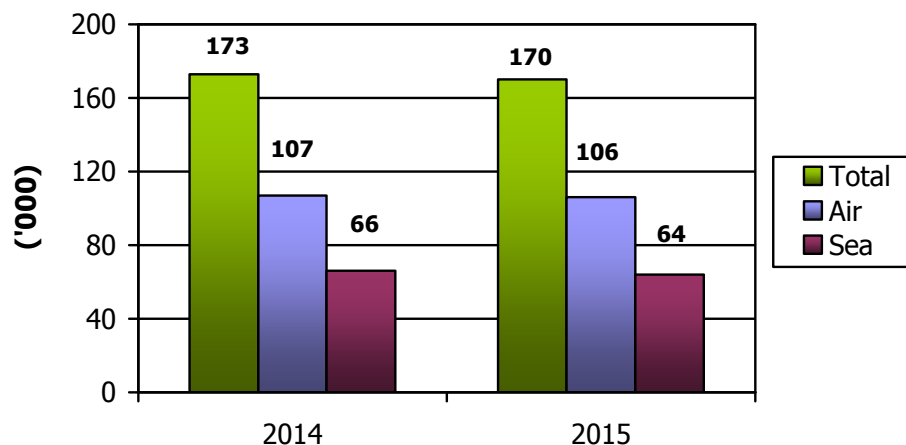
Excluding the Alderney, Sark and Herm's routes, the passenger numbers for the **first and second quarters** of 2015 were broken down as follows:



In addition to the above, there have been **59,627 passengers on cruise ships** and **5,647 visiting yachtsmen** arriving in Guernsey up to the end of June.

Comparisons with 2014

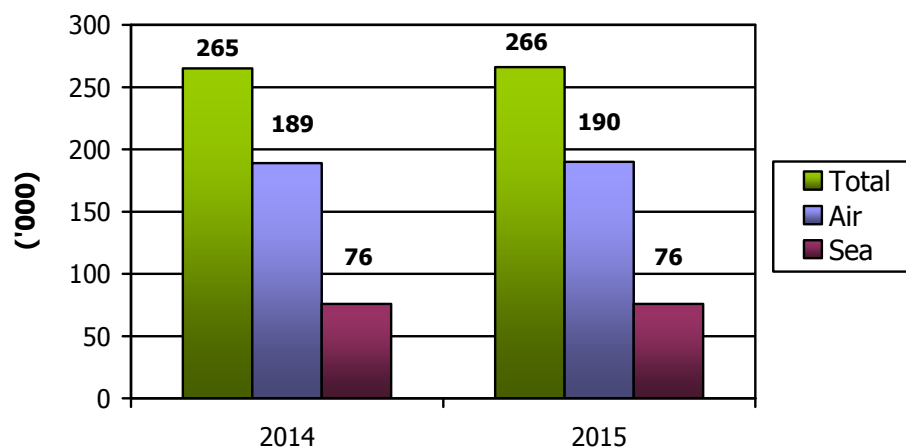
Passenger Departures Q2 2014 and 2015



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

Compared to Quarter 2 2014, there has been a 1.9% decrease in passenger departures from Guernsey, with a 1.5% decrease in passenger departures by air and a 2.5% decrease in passenger departures by sea.

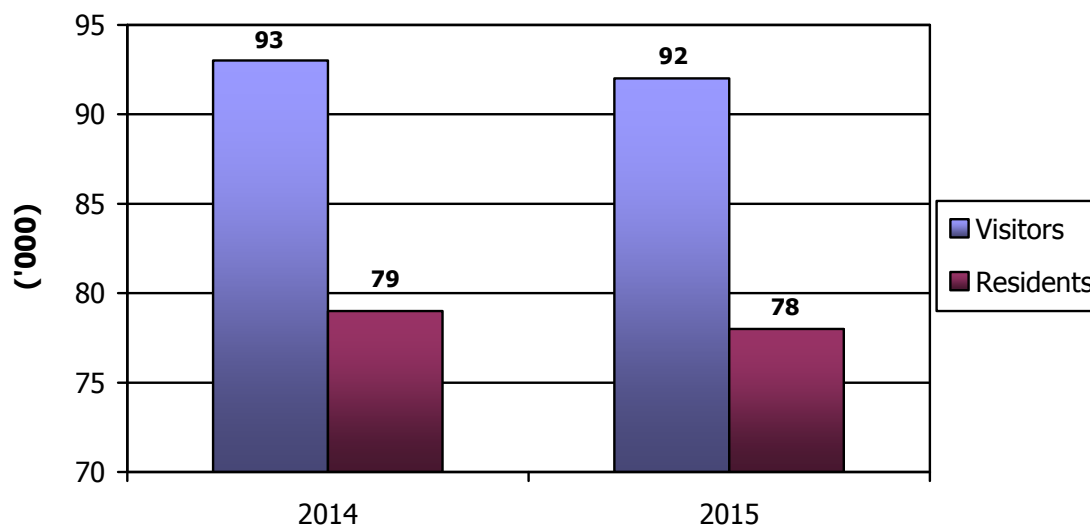
Passenger Departures January to June 2014 and 2015



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

Compared to the first 6 months of 2014, there has been a 0.6% increase in passenger departures from the Bailiwick, with a 0.4% increase in passenger departures by air and a 1.0% increase in passenger departures by sea.

Visitors vs. Residents Q2 2014 and 2015



Excluding travel from within the Bailiwick, there were **91,900 visitor departures** between April and June 2015 and **77,800 resident departures**.

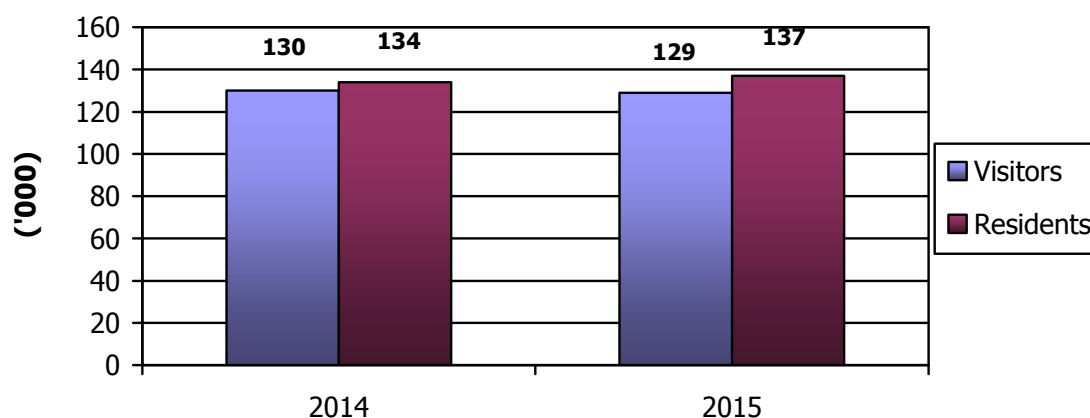
Visitor departures have **decreased overall by 1.5%** compared to Quarter 2 2014.

Excluding "returning visitors", 54.2% of departing passengers in Quarter 2 2015 were visitors to Guernsey, compared to 54.0% over the same period in 2014.

For air passengers, 52,100 (49.3%) were departing visitors and 53,600 were departing residents.

For sea passengers, 39,750 (62.1%) were departing visitors and 24,200 were departing residents.

Visitors vs. Residents January to June 2014 and 2015



Excluding travel from within the Bailiwick, there were **128,600 visitor departures** between January and June 2015 and **137,500 resident departures**.

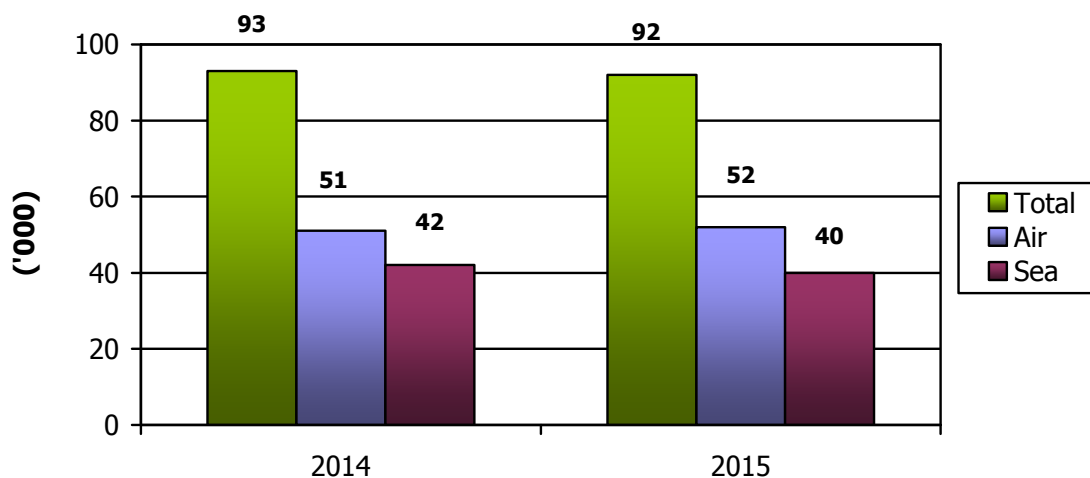
Visitor departures have **decreased overall by 1.1%** compared to the same period in 2014.

Excluding the 400 "returning visitors", 48.3% of departing passengers over the first 6 months of 2015 were visitors to Guernsey, compared to 49.2% over the same period in 2014.

For air passengers, 82,850 (43.6%) were departing visitors and 106,750 were departing residents.

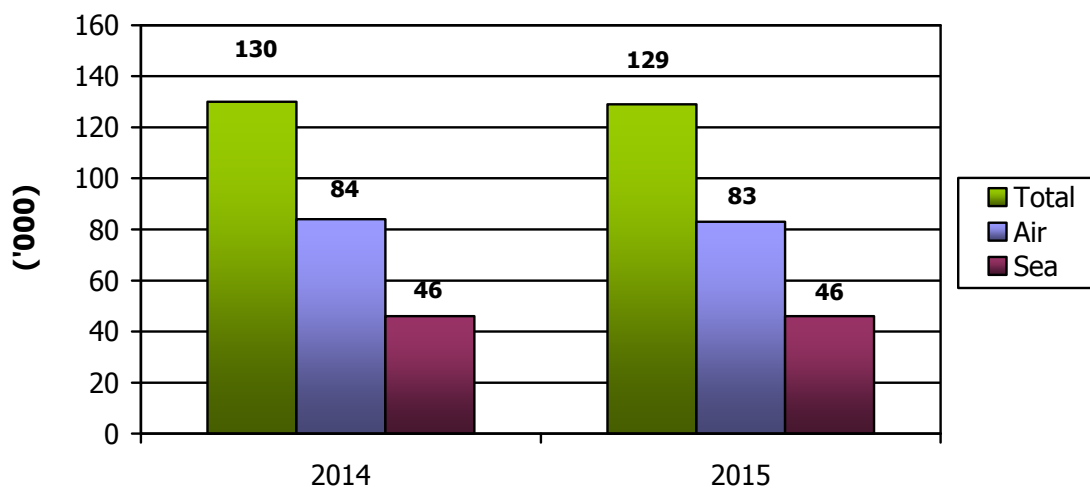
For sea passengers, 45,700 (59.8%) were departing visitors and 30,700 were departing residents.

Visitor Volumes by Travel Method Q2 2014 and 2015



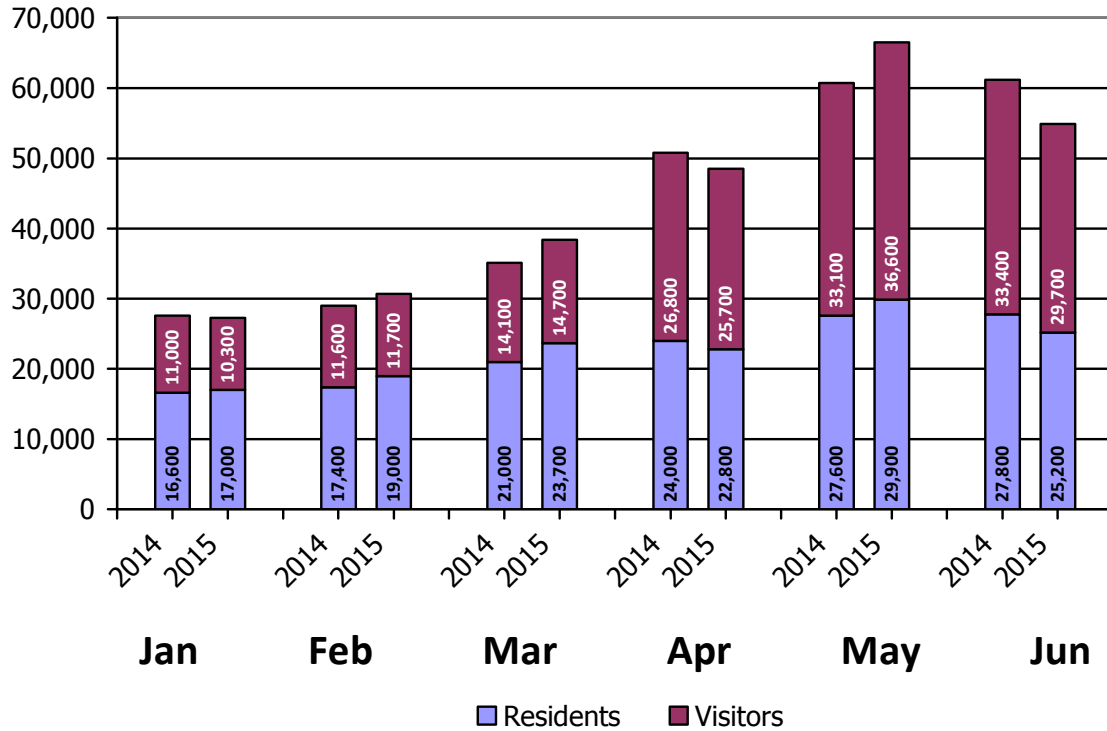
Compared to Quarter 2 2014, there has been a 1.3% increase in visitors to Guernsey by air and a 5.0% decrease in visitors by sea.

January-June Visitor Volumes by Travel Method 2014 and 2015



Compared to the first 6 months of 2014, there has been a 0.9% decrease in visitors to Guernsey by air and a 1.4% decrease in visitors by sea.

Visitor and Resident Departures by Month 2014 and 2015

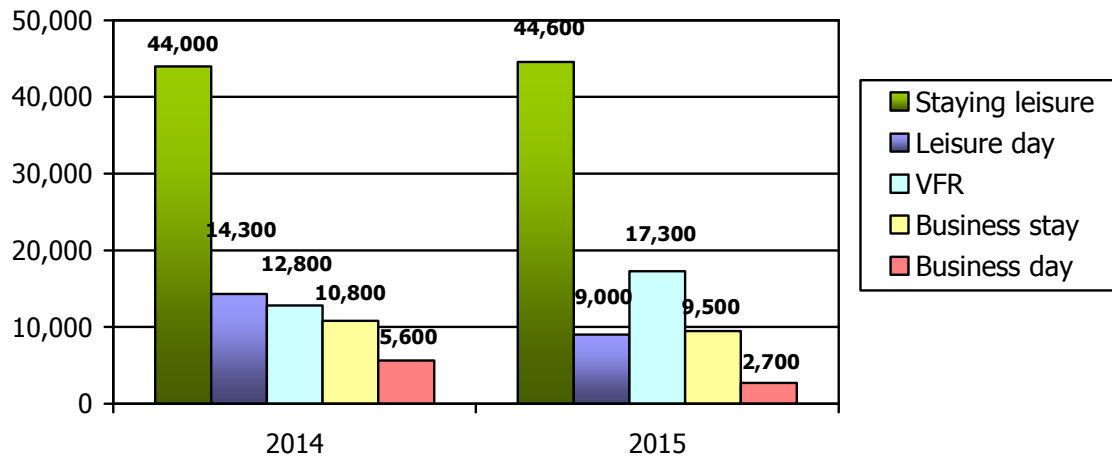


Over Q1, visitor departures decreased by 6.6% in January, and increased by 1.3% in February and by 4.0% in March.

Over Q2, visitor departures decreased by 4.1% in April, increased by 10.3% in May and decreased by 11.3% in June.

Visitors by Purpose of Visit and Travel Method

Visitor Volumes by Visit Purpose Q2 2014 and 2015



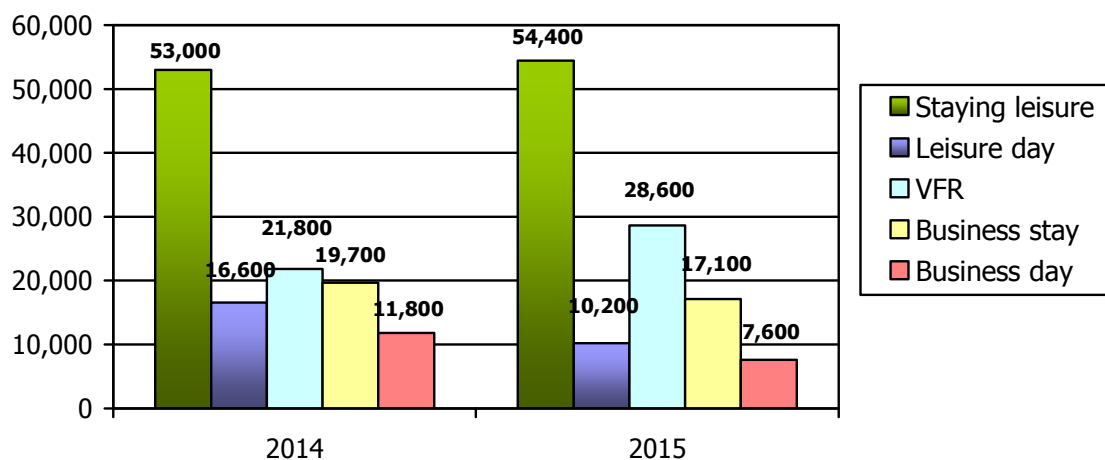
Compared to Quarter 2 2014, there has been a 1.4% increase in staying leisure visitors to Guernsey and a 34.4% increase in those visiting friends and relatives. Staying business/conference visitors have fallen by 12.0%, leisure day visits have fallen by 37.0% and business day visits have fallen by 51.6%.

Breakdown by air and sea - Q2 2014 vs. Q2 2015:

	<u>Air</u>			<u>Sea</u>		
	2014	2015	% change	2014	2015	% change
Staying Leisure Visitors	22,590	25,060	10.9%	21,430	19,580	-8.7%
Leisure Day visits	580	1,060	84.3%	13,730	7,950	-42.1%
Staying VFR	10,840	13,430	23.9%	1,850	3,600	94.5%
VFR Day visits	110	170	46.9%	40	60	57.9%
Staying Business	9,260	7,140	-22.9%	1,580	2,400	52.1%
Business Day visits	5,120	2,280	-55.5%	450	420	-7.9%

Cumulative figures 2014 vs. 2015:

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

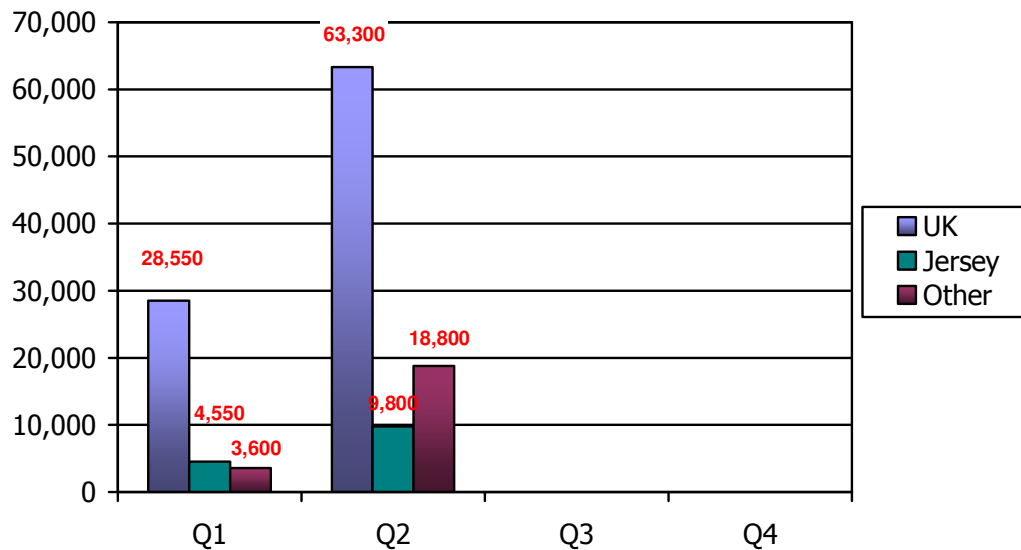


Compared to the first 6 months of 2014, there has been a 2.6% increase in staying leisure visitors to Guernsey and a 31.2% increase in those visiting friends and relatives. Staying business/conference visitors have fallen by 13.1%, leisure day visits have fallen by 38.5% and business day visits have fallen by 35.4%.

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

	<u>Air</u>			<u>Sea</u>		
	2014	2015	% change	2014	2015	% change
Staying Leisure Visitors	29,710	32,800	10.4%	23,320	21,600	-7.4%
Leisure Day visits	2,280	1,360	-40.4%	14,300	8,840	-38.2%
Staying VFR	18,940	22,940	21.1%	2,610	5,160	97.6%
VFR Day visits	200	320	60.8%	60	190	201.6%
Staying Business	17,220	13,640	-20.8%	2,430	3,440	41.5%
Business Day visits	11,220	7,060	-37.0%	570	550	-3.5%

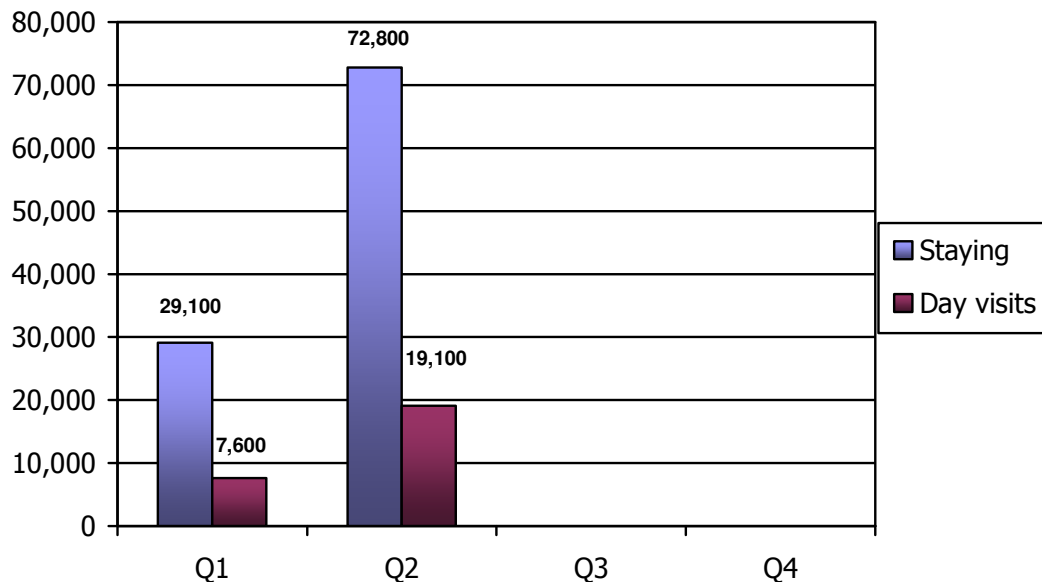
Visitor Country of Residence by Quarter 2015



68.9% of visitors to Guernsey in Quarter 2 2015 were resident in the UK, with **10.7%** coming from Jersey and the remaining **20.4%** coming from other countries.

Up to the end of June, the number of UK visitors has increased by 3.2% while the number of visitors from Jersey has decreased by 17.6% and the number of visitors from other markets has decreased by 5.3%.

Staying Visitors vs. Day Visits by Quarter 2015

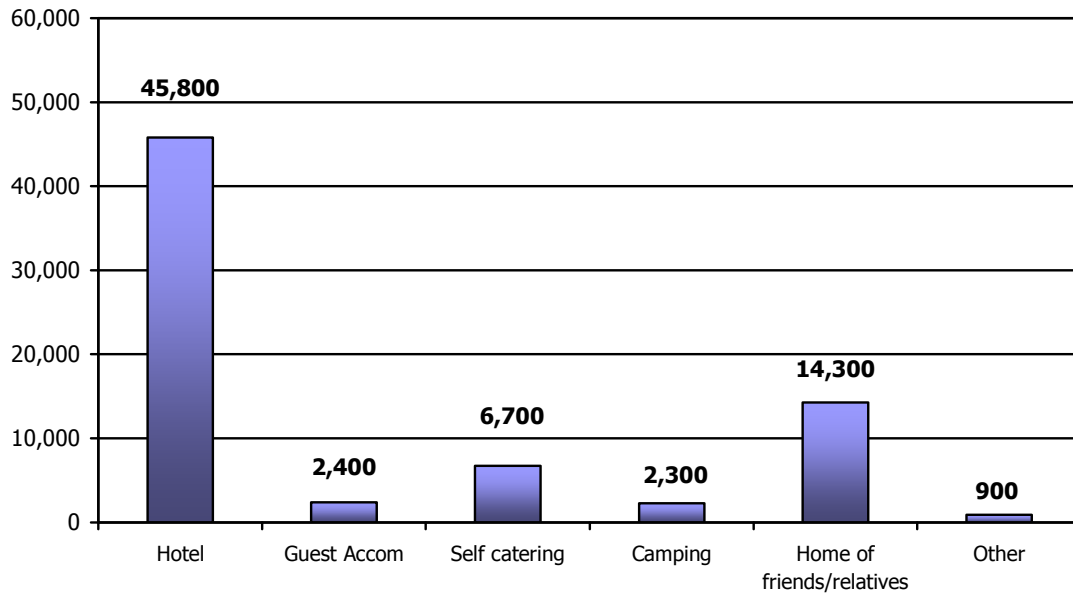


Compared to Quarter 2 2014, there has been a 6.2% increase in visitors staying in Guernsey for at least 1 night, and a 23.0% decrease in day visits to Guernsey.

Cumulatively to the end of June, staying visitors have increased by 6.5% compared to 2014, while day visits have decreased by 22.4%.

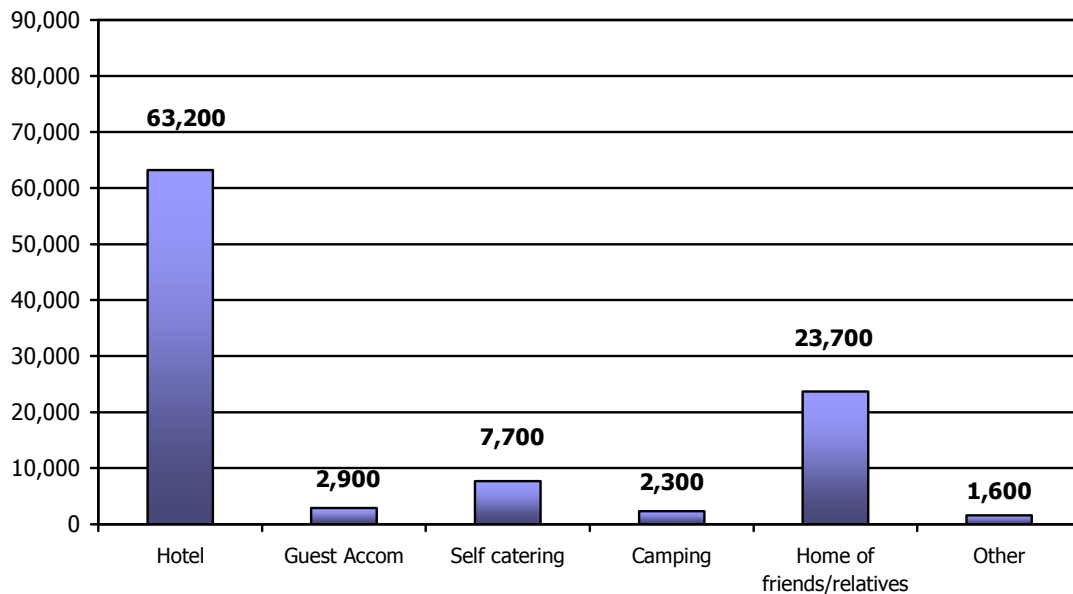
Accommodation used by Staying Visitors in Quarter 2 2015

Volume of Visitors by Accommodation Type Q2 2015



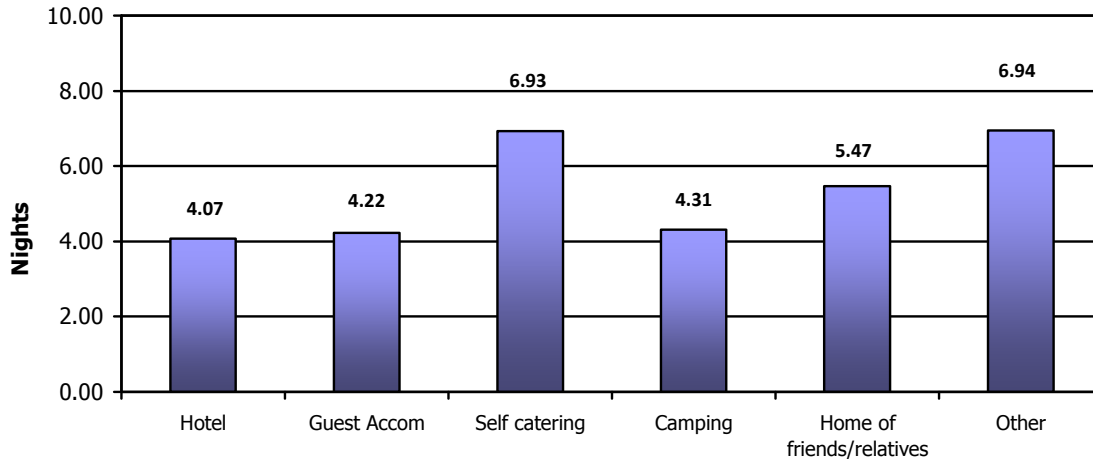
N.b. The above excludes long stay visitors (e.g. workers)

Visitors by Accommodation Type January to June 2015



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

Average Length of Stay by Accommodation Type Q2 2015



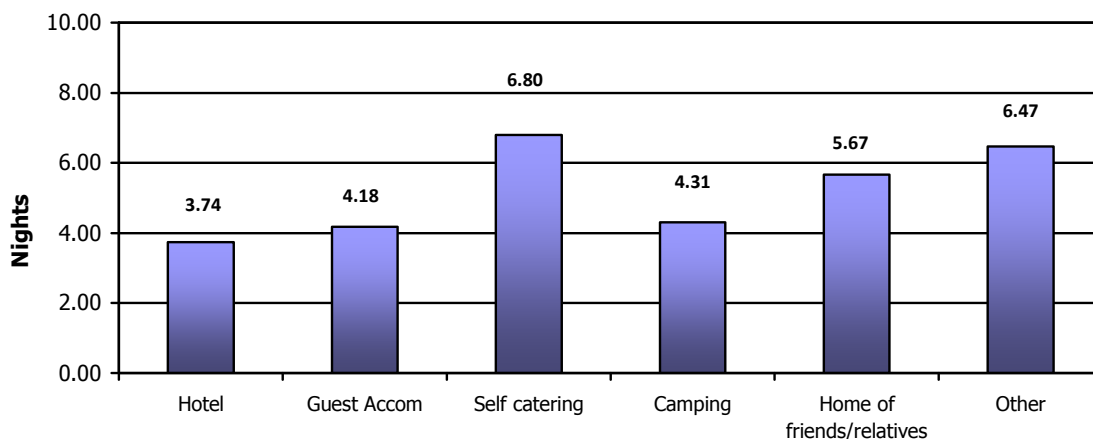
In total, there were **337,600** overnight stays in Guernsey in Quarter 2 2015 (+10.7%), with **253,200** bed nights sold in commercial accommodation (+11.3%).

The full breakdown was as follows:

Hotel bed nights:	186,500
Guest accommodation:	10,000
Self catering:	46,700
Camping:	10,000
Staying with friends/relatives:	78,400
Other	6,000

The overall average stay in Q2 for those spending at least a night in Guernsey was 4.66 nights, up from 4.47 nights in Q2 2014.

Average Length of Stay by Accommodation Type Jan to Jun 2015



Over the first 6 months of 2015, there were **456,100** overnight stays in Guernsey (+10.1%), with 311,100 bed nights sold in commercial accommodation (+10.1%).

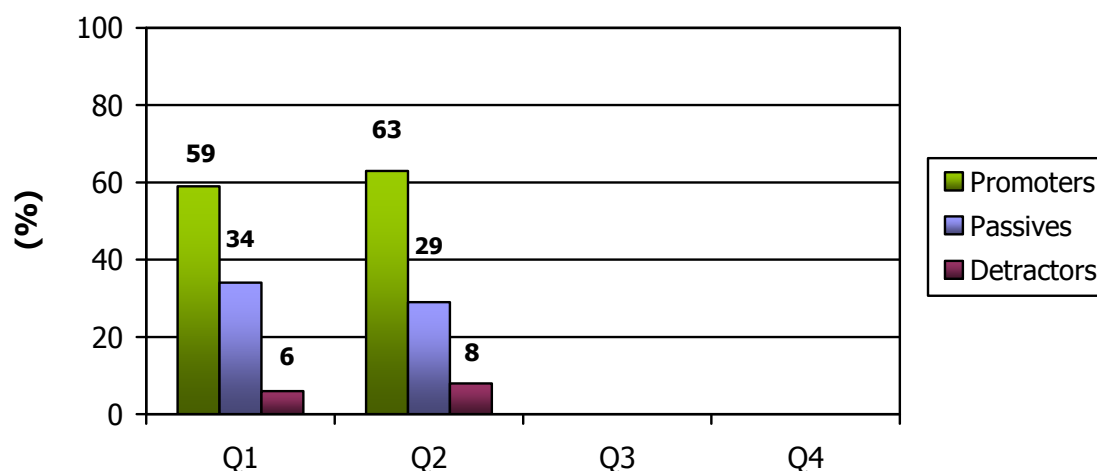
The full breakdown was as follows:

Hotel bed nights:	236,700
Guest accommodation:	12,200
Self catering:	52,300
Camping:	10,000
Staying with friends/relatives:	134,400
Other	10,600

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 Q1 + Q2 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 up to June 2015 was 8.73, with the Net Promoter Score being 54.6.

The Q2 results broken down by purpose of visit were as follows:

	<u>Average Score</u>	<u>Net Promoter Score</u>
Overall	8.72	55.2
Staying leisure visitors	8.96	63.8
Leisure day visitors	7.96	29.3
Staying VFR	9.11	67.8
Staying business visitors	8.41	44.4
Business day visitors	7.56	14.9

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

	<u>Average Score</u>	<u>Net Promoter Score</u>
Overall	8.73	54.6
Staying leisure visitors	8.94	62.8
Leisure day visitors	8.11	34.2
Staying VFR	9.12	68.1
Staying business visitors	8.47	45.1
Business day visitors	8.03	28.6

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 April to June 2015, **17,800** (16.8%) of the 105,800 departing air passengers were flying to an onward final destination.

12,000 (22.4%) of the 53,600 Guernsey residents travelling by air were flying to an onward destination and **5,800** (11.2%) of the 52,100 visitors to Guernsey departing by air were flying to an onward destination.

The breakdown by route was as follows:

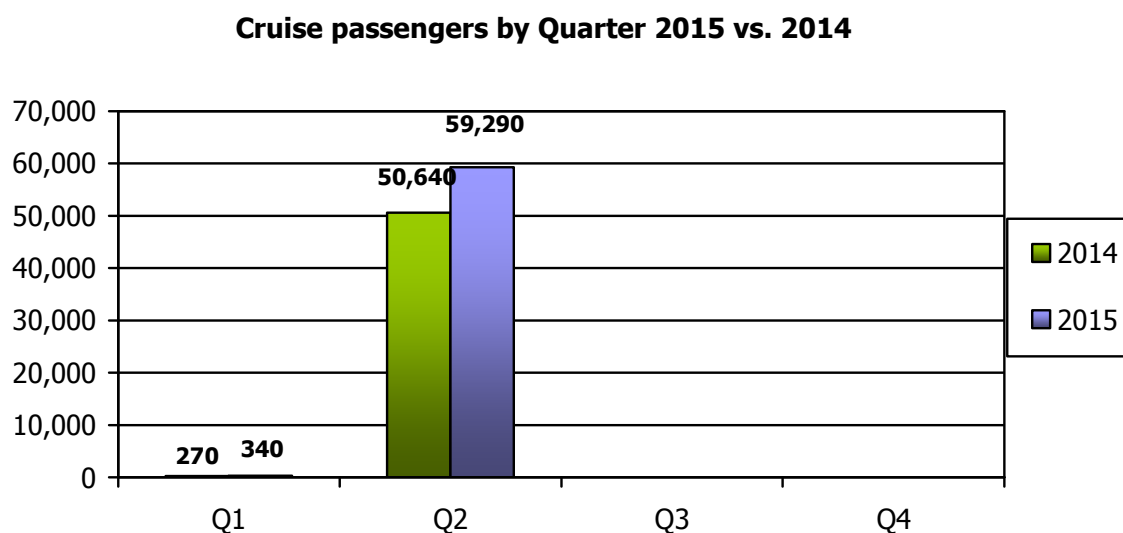
	<u>Visitor departures</u>	<u>Visitors travelling onward</u>	<u>Resident departures</u>	<u>Residents travelling onward</u>
Gatwick	15,640	2,740	24,610	9,380
Southampton	9,180	600	8,100	800
Manchester	6,300	60	2,720	150
East Midlands	3,530	40	890	10
Birmingham	2,720	700	1,100	310
Stansted	2,520	140	1,080	310
Bristol	2,040	30	1,200	50
Exeter	1,750	120	1,550	190
London City	1,400	270	1,740	240
Other UK Air	170	0	0	0
TOTAL UK AIR	45,250	4,700	42,990	11,450
Jersey air	5,760	1,050	10,170	420
Foreign air	1,120	70	400	110
TOTAL AIR	52,130	5,820	53,560	11,980

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

1. Spanish mainland	1,670 passengers	(90 visitors)
2. Scottish airports	1,350 passengers	(920 visitors)
3. Other English airports	1,280 passengers	(960 visitors)
4. Italy	980 passengers	(90 visitors)
5. Germany	860 passengers	(510 visitors)
6. USA	850 passengers	(220 visitors)
7. Northern Ireland	820 passengers	(390 visitors)
8. France	750 passengers	(380 visitors)
9. Netherlands	750 passengers	(380 visitors)
10. Canary Islands	630 passengers	(50 visitors)
11. Switzerland	600 passengers	(220 visitors)
12. Latvia	540 passengers	(20 visitors)
13. Portugal (excl. Madeira)	470 passengers	(60 visitors)
14. Ireland	480 passengers	(220 visitors)
15. Greece & Islands	440 passengers	(10 visitors)
16. Balearic Islands	380 passengers	(10 visitors)
17. Madeira	340 passengers	(90 visitors)
18. Cyprus	310 passengers	(0 visitors)
19. Caribbean Islands	290 passengers	(20 visitors)
20. Canada	220 passengers	(110 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 Q2, the number of cruise passenger arrivals has increased by **17.1%** compared to Q2 2014 and the cumulative total to the end of June has also increased by **17.1%**.

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.

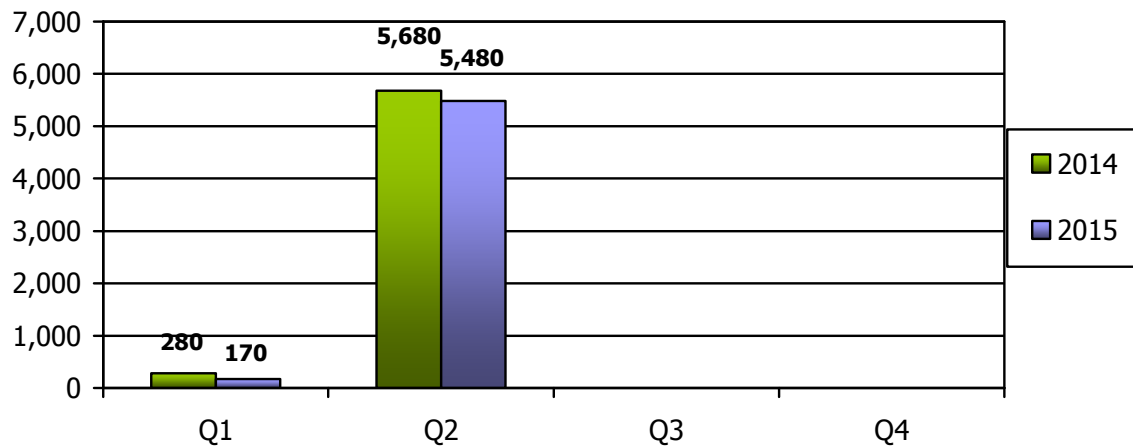
A new question was added to the survey in November 2014 asking visitors who had visited Guernsey previously whether they had ever visited before on a cruise.

From the 2,489 respondents who answered this question over Q2 2015, only 13 said that they had previously visited on a cruise. This represents **only 0.5%** 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 Q2 2015, the number of pleasure passenger arrivals was **5,480 (-3.6%)** compared to 5,680 in Q2 2014.

Cumulatively to the end of June, the number of pleasure passenger arrivals has **fallen by 5.2%**.

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 second 2015 quarterly report on passenger departures between April and June (Q2 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 April and June 2015, **392 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 Q2 therefore comes from **7,110 interviews, representing 14,420 departing passengers (8.5% of Guernsey's total departing passengers, excluding the Alderney, Sark and Herm routes, over Q2 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 14,000 passengers provides a strong degree of statistical confidence in the results for Q2 2015. As sample sizes increase on some of the smaller routes, the cumulative data will become increasingly strengthened as the survey progresses and some of the data for earlier quarters will be updated.

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

- Passenger throughput by month.
- Passenger throughput at the various sampling points (Airport, Harbour Passenger and Car Terminals)
- Sark and Herm ferries were not covered in this quarter
- Representative coverage of weekdays and weekends as the profile of passengers differs by day of week.
- Representative coverage of passenger movements by time of day (e.g. the profile of passengers leaving Guernsey early in the morning is different to the profile of passengers departing at the end of the day).

Statistical Reliability and Bias

Sample surveys are always subject to statistical error and the higher the sample size, the lower the margin of statistical variation. The table below gives an indication of the levels of statistical error to which the data are theoretically subject at the 95% Confidence Level.

Research Results					
Sample Size	10% or 90%	20% or 80%	30% or 70%	40% or 60%	50%
7,100	+/- 0.7	+/- 0.9	+/- 1.1	+/- 1.1	+/- 1.2
4,000	+/- 0.9	+/- 1.2	+/- 1.4	+/- 1.5	+/- 1.6
1,000	+/- 1.9	+/- 2.5	+/- 2.8	+/- 3.0	+/- 3.1
500	+/- 2.6	+/- 3.5	+/- 4.0	+/- 4.3	+/- 4.4

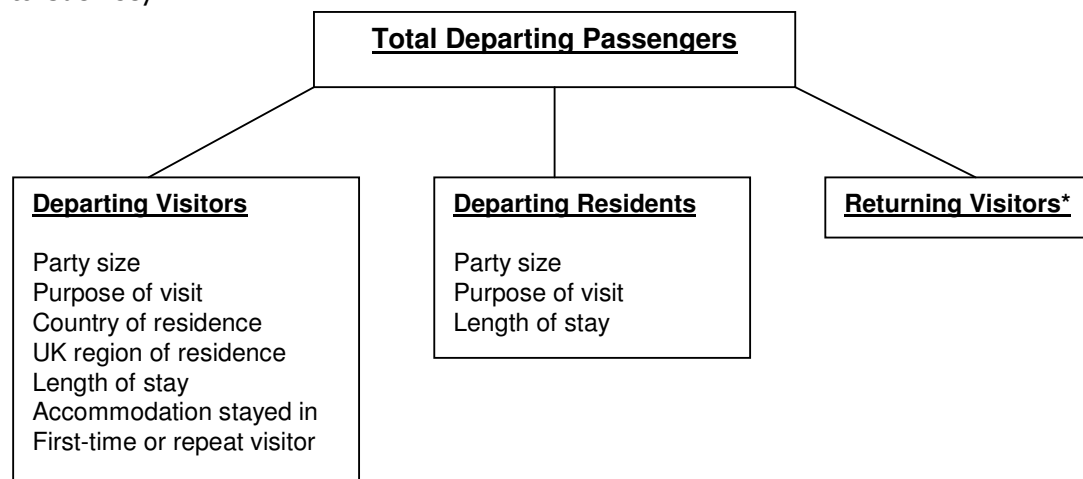
Based upon a total sample size from Q2 of 7,100, a finding that 54.1% of respondents were departing visitors would mean that the true figure for all respondents is 95% likely to be within the range 52.9% to 55.3%, but is more likely to be near the centre of this range (i.e. closer to the survey sample finding). For departing visitors, based upon a sub-sample size of 4,000, the finding that 48.6% were staying leisure visitors would have a statistical variation of between 47.0% and 50.2%. 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 9.3% in Q2 2015. This refusal rate compares very favourably with other similar surveys.

Survey outputs

The primary aim of the survey is to determine the breakdown of passengers on each route in order to determine the overall number of visitors to Guernsey by purpose of visit and country of residence. Some additional profiling questions are asked of visitors, and residents are also asked their purpose of visit and length of stay away from Guernsey.

The breakdown of passenger arrivals provides the following information for every major route to Guernsey:



***Returning visitors are those who are counted twice in passenger numbers because they visit elsewhere during their stay in Guernsey (e.g. visitor day trips to Sark, Herm or Jersey).**

The above breakdown of passengers will be provided for each major transport route to Guernsey in 2015, and is grossed up to show total air and total sea passenger breakdowns.

As sample sizes for some of the smaller transport routes are not large enough on a monthly or seasonal basis, the profile of passengers across the whole period of the survey is applied. Also, some of the smaller transport routes are combined into groupings.

2015 Passenger Departures Including Alderney, Sark and Herm Departures

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

	<u>Volume</u>	<u>% of total pax.</u>	<u>2015 vs. 2014</u>
London Gatwick	73,770	23.0%	-0.8%
Southampton	32,840	10.2%	-18.4%
Manchester	14,660	4.6%	5.3%
Birmingham	6,520	2.0%	19.9%
East Midlands	6,270	2.0%	13.4%
Exeter	5,970	1.9%	12.0%
London City	5,700	1.8%	n/a
Stansted	5,170	1.6%	37.1%
Bristol	5,060	1.6%	-4.7%
Other UK Air	240	0.1%	-28.6%
Total UK Air	156,210	48.7%	1.3%
Jersey	31,620	9.9%	-3.8%
Alderney	8,320	2.6%	-2.3%
Total CI Air	39,940	12.5%	-3.5%
Dinard	610	0.2%	-27.0%
Swiss Air	70	*	25.9%
Other Foreign Air	1,520	0.5%	26.2%
Total Foreign Air	2,210	0.7%	4.9%
Total Air:	198,360	61.9%	0.3%
UK Sea	33,080	10.3%	-6.2%
Jersey	23,730	7.4%	1.7%
Herm	26,450	8.3%	-4.0%
Sark	19,180	6.0%	7.2%
St. Malo	15,720	4.9%	5.0%
Other French Sea	3,910	1.2%	87.9%
Total Sea:	122,070	38.1%	0.8%
Total Departures:	320,430		0.5%

2015 Definitions

Island Ark has used the purpose of visit definitions as declared by the visitor, irrespective of where they stayed:

If they declare their main purpose of visit as "Leisure/Holiday", but say that they are staying with friends or relatives, their purpose remains as "Staying leisure/holiday".

If they declare their main purpose of visit as "Seeing friends/family", but say that they are staying in commercial accommodation, their purpose remains as "Staying VFR".

Prior to 2012, those stating that they were in transit and had not stayed in Guernsey were classified as "Leisure Daytrippers". From 2012 these have been reclassified as "Other Day Visits". "Other" purposes of visit would include those visiting Guernsey for other purposes that would not be considered as either leisure or business such as funerals, weddings, other family gatherings, deliveries, medical reasons, job interviews, study visits/school trips etc.

Fieldwork, Interviewers and Quality Control Standards

As a full member and company partner of the Market Research Society, Island Ark is required to provide best quality practice in all projects undertaken and to adhere to the guidelines set out by the **Market Research Society Code of Conduct** and the **Interviewer Quality Control Scheme**.

All interviewers employed directly by Island Ark receive the necessary training in order to put across a professional and friendly image to departing passengers, whilst still achieving the required number of interviews using the sampling manner determined.

All interviewers are issued with a current copy of the Market Research Society Code of Conduct, printed interviewer instructions and identity cards.

Interview shifts are periodically checked to ensure that the interviewers are present and are undertaking their interviews in the manner specified.

Data Preparation & Processing

All returned questionnaires are hand-edited and coded in-house by Island Ark before data entry. Data entry screens, with controls over incorrect data entry have been set up by Island Ark, and data inputting is sub-contracted to Jersey Input Direct Ltd. Island Ark undertakes a final data cleaning process prior to analysis.

It is vitally important in this survey that when grossing up sample survey results by large passenger volumes that the sample data inputted is accurate and realistic. Computer checks are run to verify data validity, and a minimum of 10% of the inputted questionnaires are manually checked for correct data entry. With knowledge of the tourism and transport industries, as well as previous experience of analysing data from such exit surveys, it is ensured that any "outlying" data is manually checked back to the questionnaire and, if appropriate, excluded from the sample where it could have a major impact on the grossed up results.

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