

# **2016 Travel Survey**

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

## **RESEARCH REPORT ON Q4 2016**

**January 20<sup>th</sup> 2017**

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## Summary of Results for Q4

	<b><u>2015</u></b>	<b><u>2016</u></b>	<b><u>% change</u></b>
<b>Total departing passengers</b>	<b>117,600</b>	<b>113,800</b>	<b>-3.3%</b>
Total departing visitors	44,600	48,300	+8.2%
Departing visitors by air	35,700	37,800	+5.8%
Departing visitors by sea	8,900	10,500	+18.2%
Staying leisure visitors	14,100	16,600	+18.1%
Visiting friends and relatives	13,900	13,400	-3.6%
Staying business / conference	8,300	8,850	+6.2%
Leisure day visits	1,800	1,650	-7.3%
Business day visits	3,100	3,600	+17.1%
<b>Total for the above purposes of visit *</b>	<b>41,200</b>	<b>44,200</b>	<b>+7.2%</b>
Total staying visitors	36,700	40,700	+10.9%
Average length of stay **	4.39 nights	4.29 nights	-2.1%
Total overnight stays (bed nights) **	160,100	170,900	+6.7%
Total staying in commercial accommodation	24,100	27,000	+12.0%
Average stay in commercial accommodation	3.89 nights	3.73 nights	-4.2%
Bed nights in commercial accommodation	93,800	100,600	+7.3%
Day visits	7,900	7,600	-4.1%
UK visitors	35,000	36,400	+4.1%
Jersey visitors	4,200	5,650	+34.1%
Other nationalities	5,500	6,250	+14.6%
Cruise ship passengers ***	2,490	100	-95.8%
Visiting yachtsmen ***	410	340	-16.3%
Departing Guernsey residents	72,900	65,200	-10.6%
Departing residents by air	64,200	56,000	-12.8%
Departing residents by sea	8,700	9,200	+5.8%
Net Promoter Score	48%	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

	<b><u>2015</u></b>	<b><u>2016</u></b>	<b><u>% change</u></b>
<b>Total departing passengers</b>	<b>586,600</b>	<b>557,500</b>	<b>-5.0%</b>
Total departing visitors	294,300	279,700	-5.0%
Departing visitors by air	185,400	188,500	+1.7%
Departing visitors by sea	108,900	91,200	-16.3%
Staying leisure visitors	130,050	129,900	-0.1%
Visiting friends and relatives	65,850	58,100	-11.7%
Staying business / conference	33,500	31,000	-7.3%
Leisure day visits	25,100	20,800	-16.9%
Business day visits	13,100	13,900	+6.3%
<b>Total for the above purposes of visit *</b>	<b>267,500</b>	<b>253,800</b>	<b>-5.1%</b>
Total staying visitors	232,500	229,600	-1.2%
Average length of stay **	4.88 nights	4.75 nights	-2.8%
Total overnight stays (bed nights) **	1,129,000	1,078,750	-4.5%
Total staying in commercial accommodation	171,600	169,000	-1.5%
Average stay in commercial accommodation	4.51 nights	4.41 nights	-2.4%
Bed nights in commercial accommodation	774,500	744,600	-3.9%
Day visits	61,800	50,100	-18.9%
UK visitors	215,500	200,600	-6.9%
Jersey visitors	27,300	24,600	-10.1%
Other nationalities	51,400	54,500	+6.0%
Cruise ship passengers ***	123,050	132,950	+8.0%
Visiting yachtsmen ***	19,560	16,675	-14.7%
Departing Guernsey residents	291,600	276,300	-5.3%
Departing residents by air	226,500	215,100	-5.0%
Departing residents by sea	65,100	61,200	-6.0%
Net Promoter Score	54%	51%	

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

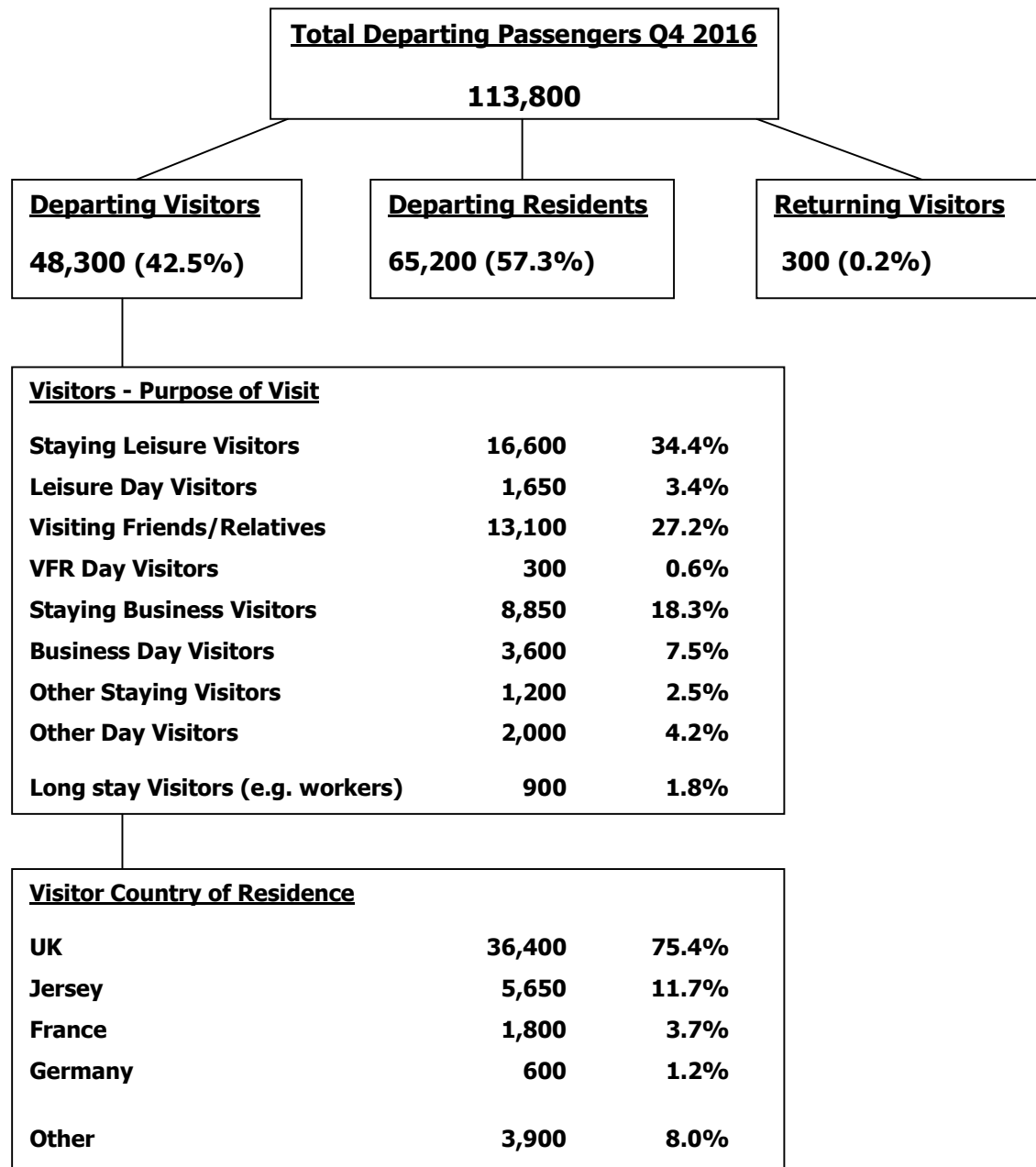
**\* These figures exclude "Other staying", "Other day" and "Long stay" visitors as shown in the breakdown on page 2 and as defined in the appendices.**

**\*\* 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

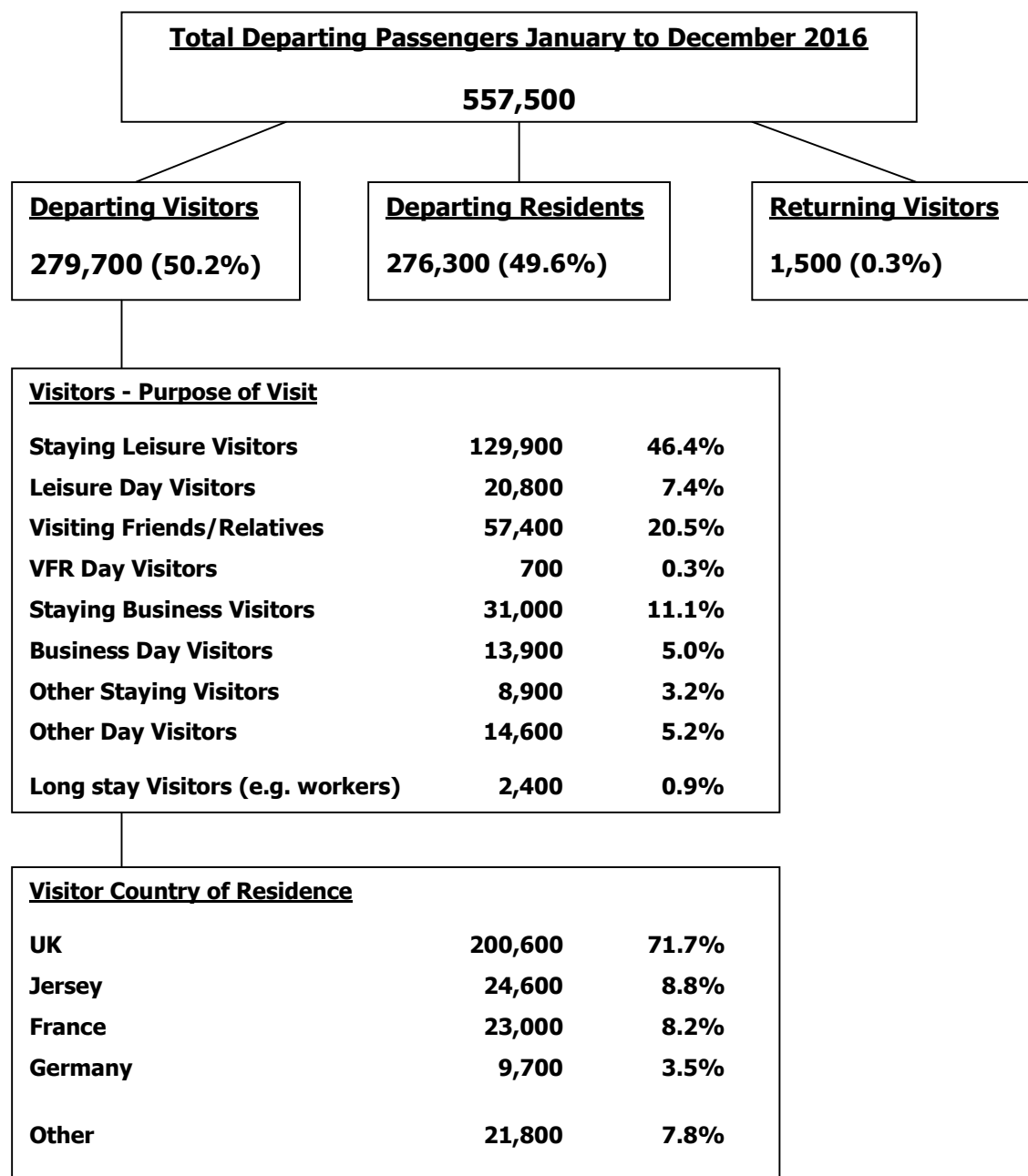
Excluding the Alderney, Sark and Herm routes, the passenger numbers for the **fourth quarter** of 2016 were broken down as follows:



In addition to the above, there were **104 passengers on cruise ships** and **343 visiting yachtsmen** arriving in Guernsey over the period October to December.

## Cumulative Survey Results – January to December

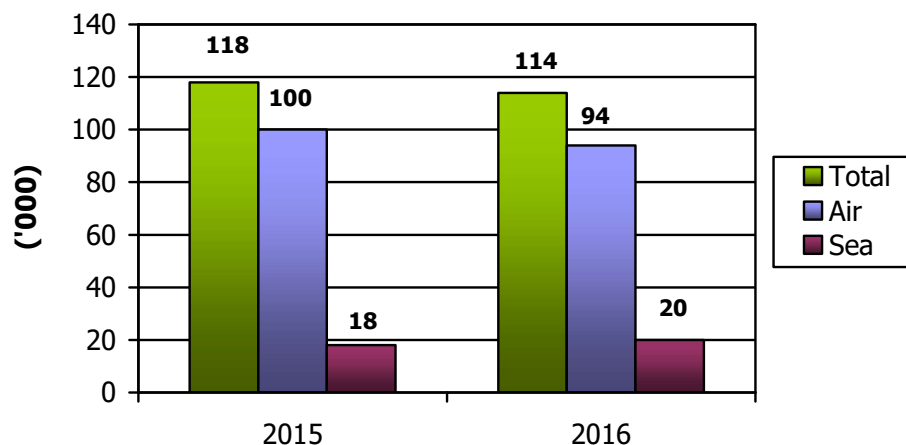
Excluding the Alderney, Sark and Herms routes, the passenger numbers for the **whole of 2016** were broken down as follows:



In addition to the above, there have been **132,950 passengers on cruise ships** and **16,675 visiting yachtsmen** arriving in Guernsey over the whole of 2016.

## Comparisons with 2015

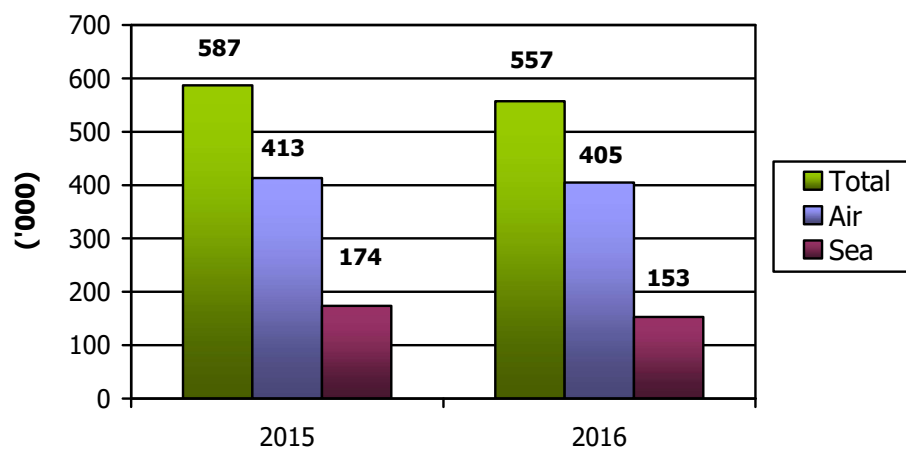
### Passenger Departures Q4 2015 and 2016



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

Compared to Quarter 4 2015, there has been a 3.3% decrease in passenger departures from Guernsey, with a 6.0% decrease in passenger departures by air and a 12.1% increase in passenger departures by sea.

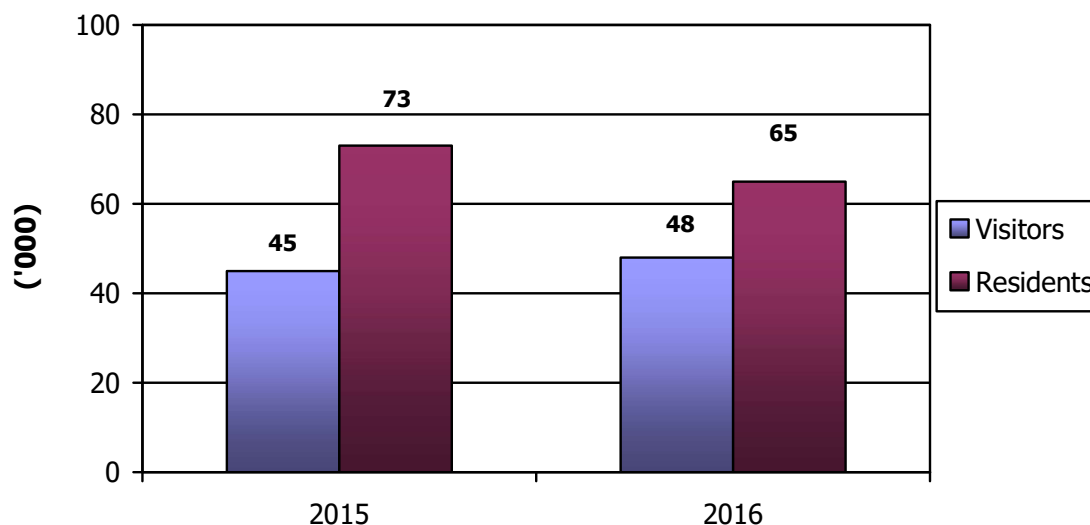
### Passenger Departures January to December 2015 and 2016



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

Compared to the whole of 2015, there has been a 5.0% decrease in passenger departures from Guernsey, with a 1.9% decrease in passenger departures by air and a 12.3% decrease in passenger departures by sea.

### Visitors vs. Residents Q4 2015 and 2016



Excluding travel from within the Bailiwick, there were **48,300 visitor departures** between October and December 2016 and **65,200 resident departures**.

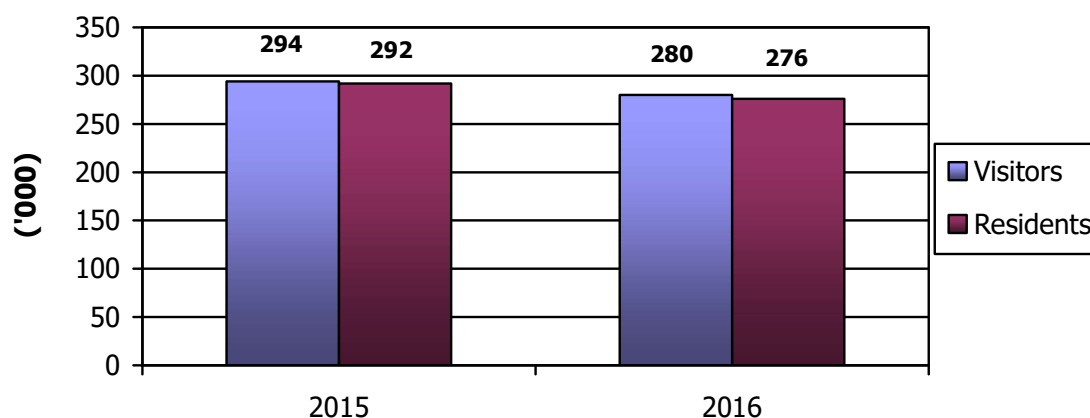
Visitor departures have **increased overall by 8.2%** compared to Quarter 4 2015.

Excluding "returning visitors", 42.6% of departing passengers in Quarter 4 2016 were visitors to Guernsey, compared to 38.0% over the same period in 2015.

For air passengers, 37,800 (40.2%) were departing visitors and 56,000 were departing residents.

For sea passengers, 10,500 (53.4%) were departing visitors and 9,200 were departing residents.

### Visitors vs. Residents January to December 2015 and 2016



Excluding travel from within the Bailiwick, there were **279,700 visitor departures** between January and December 2016 and **276,300 resident departures**.

Visitor departures have **decreased overall by 5.0%** compared to the same period in 2015.

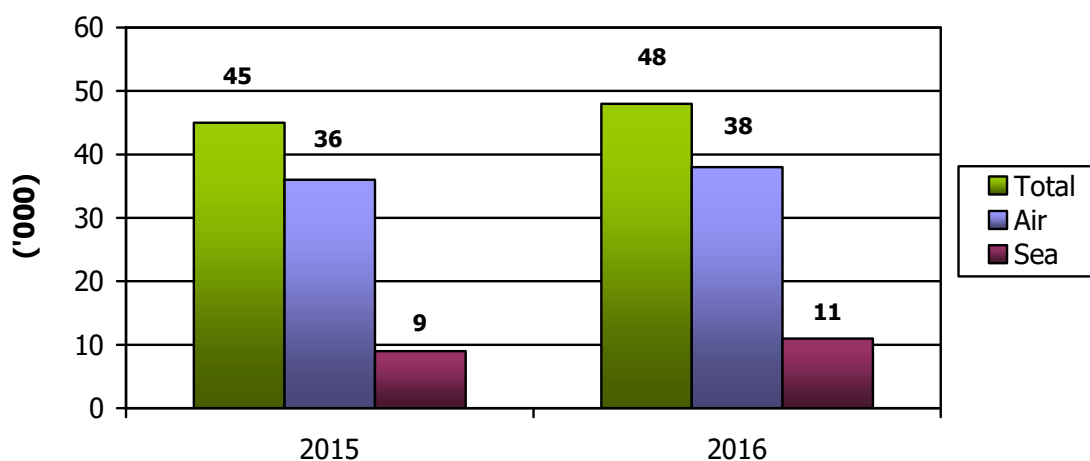
Excluding the 1,500 "returning visitors", 50.3% of departing passengers over the whole of 2016 were visitors to Guernsey, compared to 50.2% over the same period in 2015.

For air passengers, 188,500 (46.6%) were departing visitors and 215,100 were departing residents.

For sea passengers, 91,200 (59.8%) were departing visitors and 61,200 were departing residents.

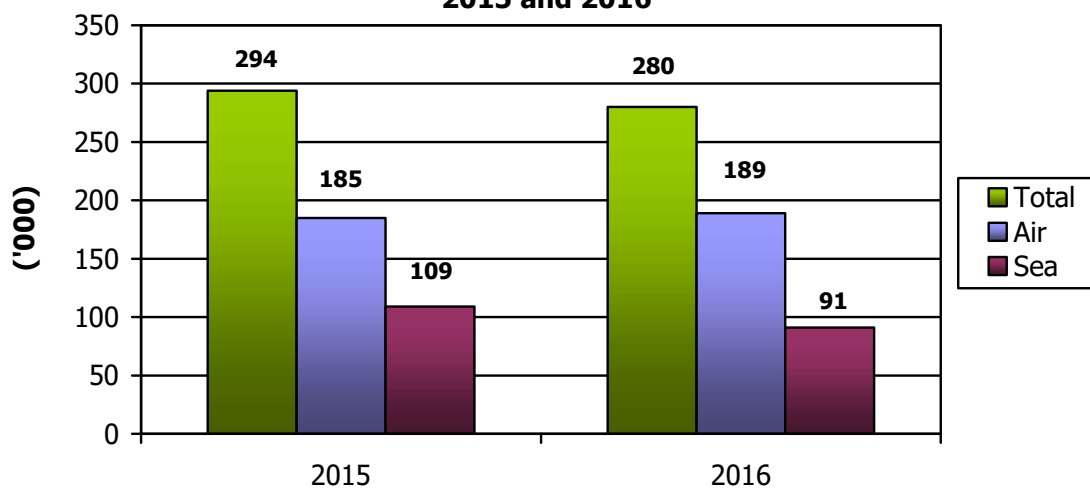


### Visitor Volumes by Travel Method Q4 2015 and 2016



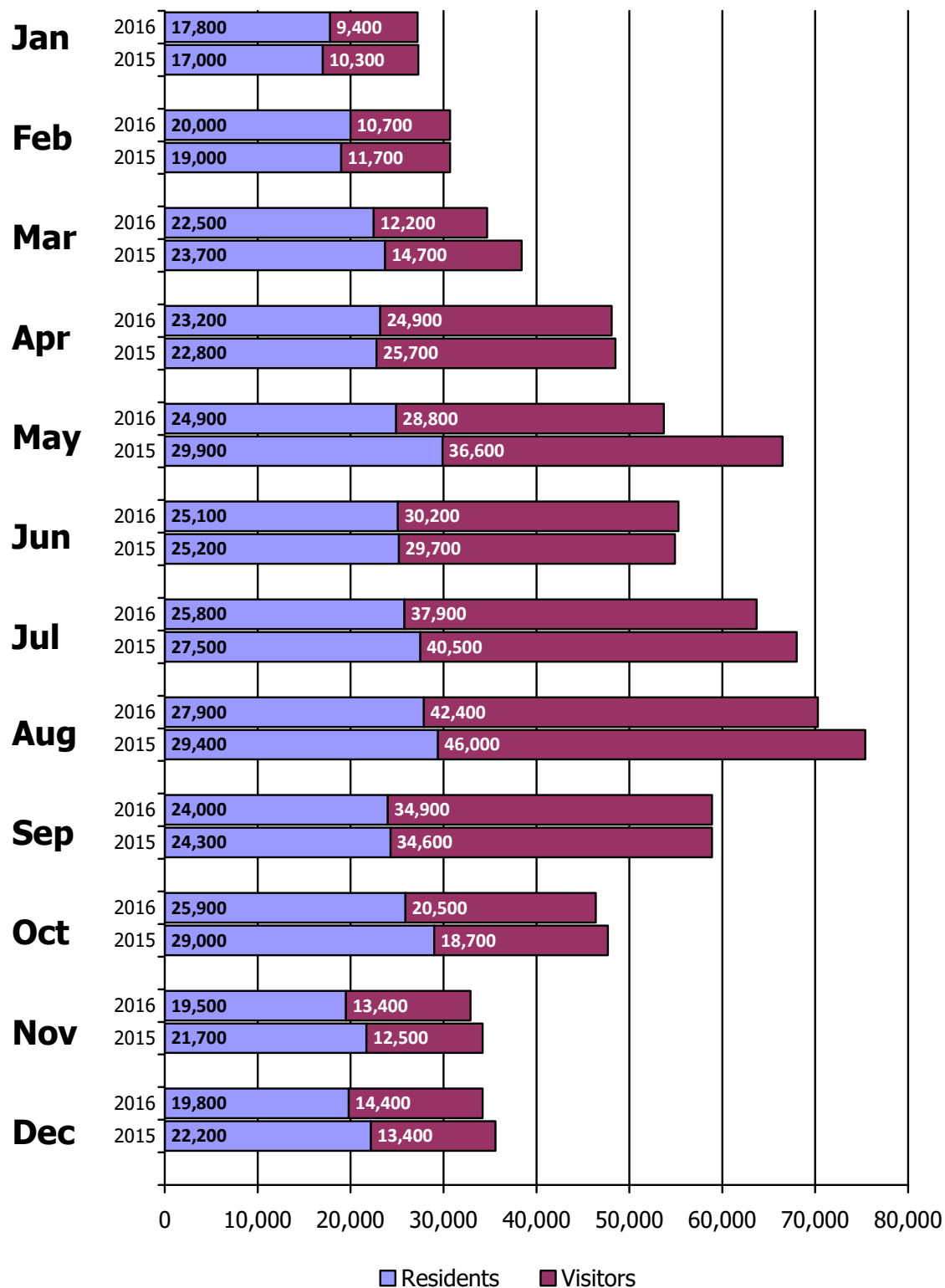
Compared to Quarter 4 2015, there has been a 5.8% increase in visitors to Guernsey by air and an 18.3% increase in visitors by sea.

### January-December Visitor Volumes by Travel Method 2015 and 2016



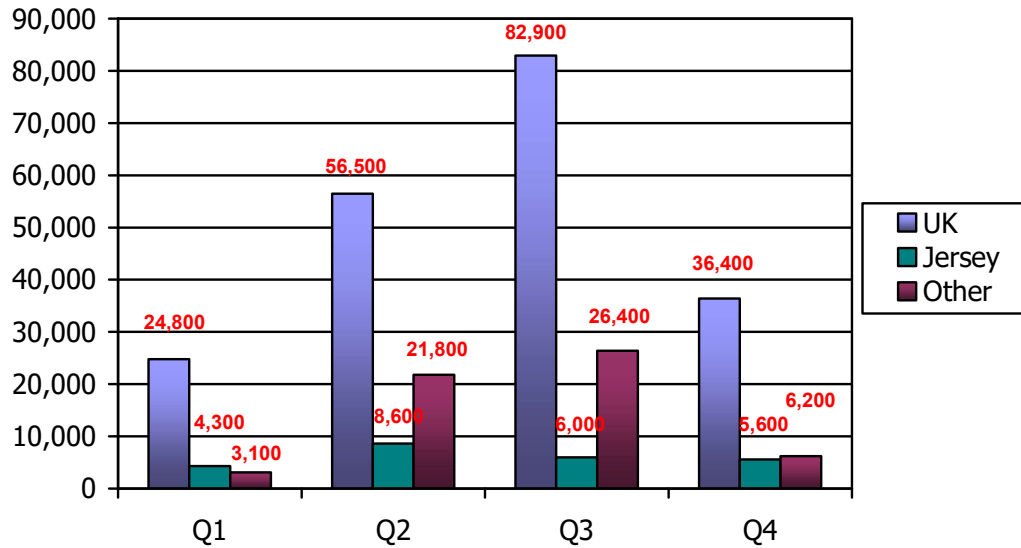
Compared to the whole of 2015, there has been a 1.7% increase in visitors to Guernsey by air and a 16.3% decrease in visitors by sea.

### Visitor and Resident Departures by Month 2015 and 2016



Over Q1, visitor departures decreased by 8.7% in January, by 9.1% in February and by 16.8% in March. Over Q2, visitor departures decreased by 3.0% in April and by 21.3% in May, and increased by 1.9% in June. Over Q3, visitor departures decreased by 6.2% in July and by 7.7% in August, and increased by 0.8% in September. Over Q4, visitor departures increased by 9.7% in October, by 6.9% in November and by 7.5% in December.

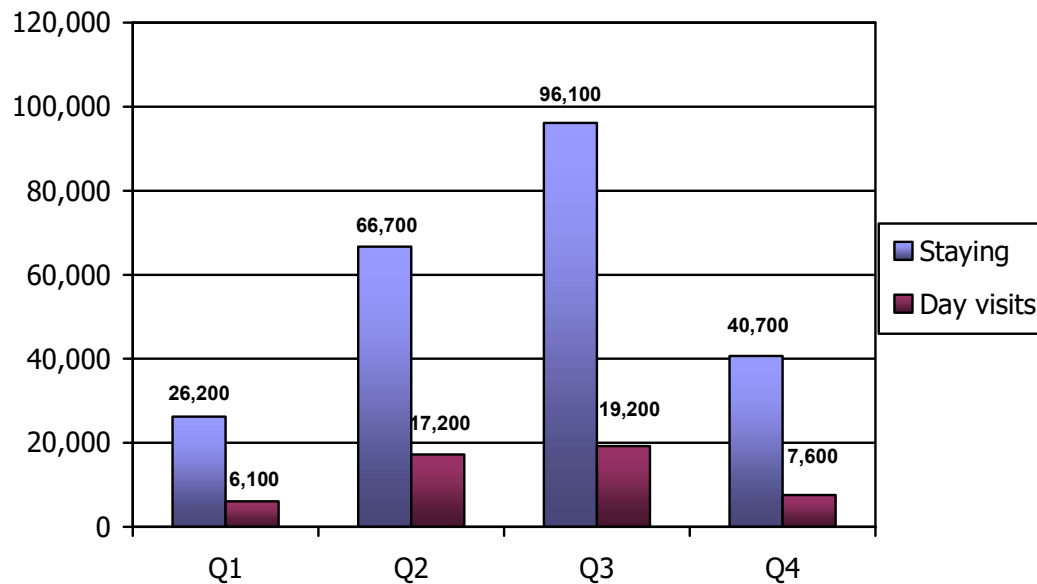
### Visitor Country of Residence by Quarter 2016



**75.4%** of visitors to Guernsey in Quarter 4 2016 were resident in the UK, with **11.7%** coming from Jersey and the remaining **12.9%** coming from other countries.

Over the whole year, the number of UK visitors has decreased by 6.9%, the number of visitors from Jersey has decreased by 10.1% and the number of visitors from other markets has increased by 6.0%.

### Staying Visitors vs. Day Visits by Quarter 2016

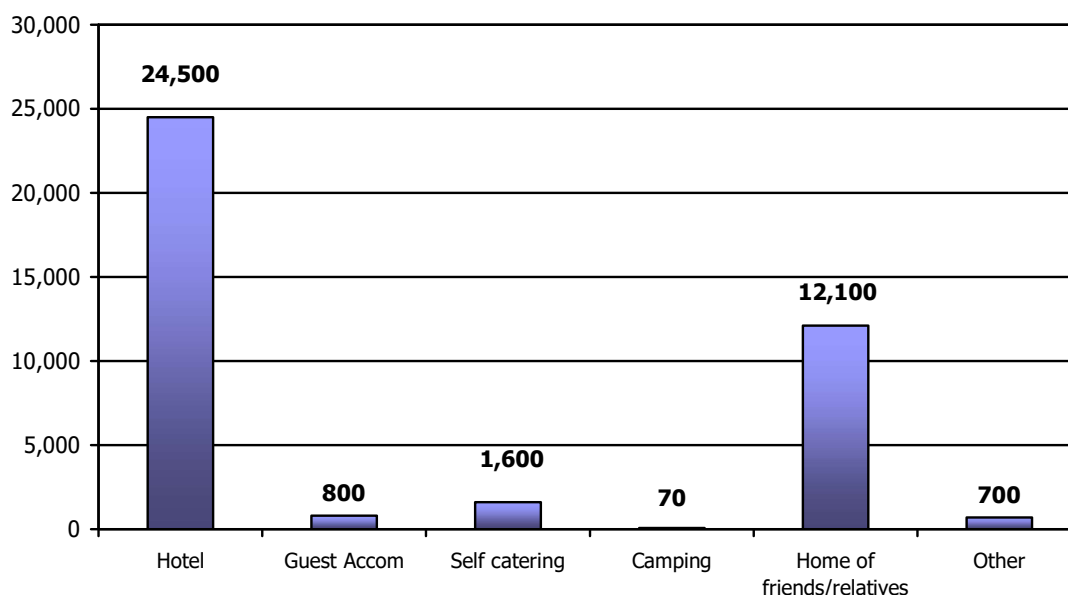


Compared to Quarter 4 2015, there has been a 10.9% increase in visitors staying in Guernsey for at least 1 night, and a 4.1% decrease in day visits to Guernsey.

Over the whole year, staying visitors have decreased by 1.2% compared to 2015, while day visits have decreased by 18.9%.

## Accommodation used by Staying Visitors in Quarter 4 2016

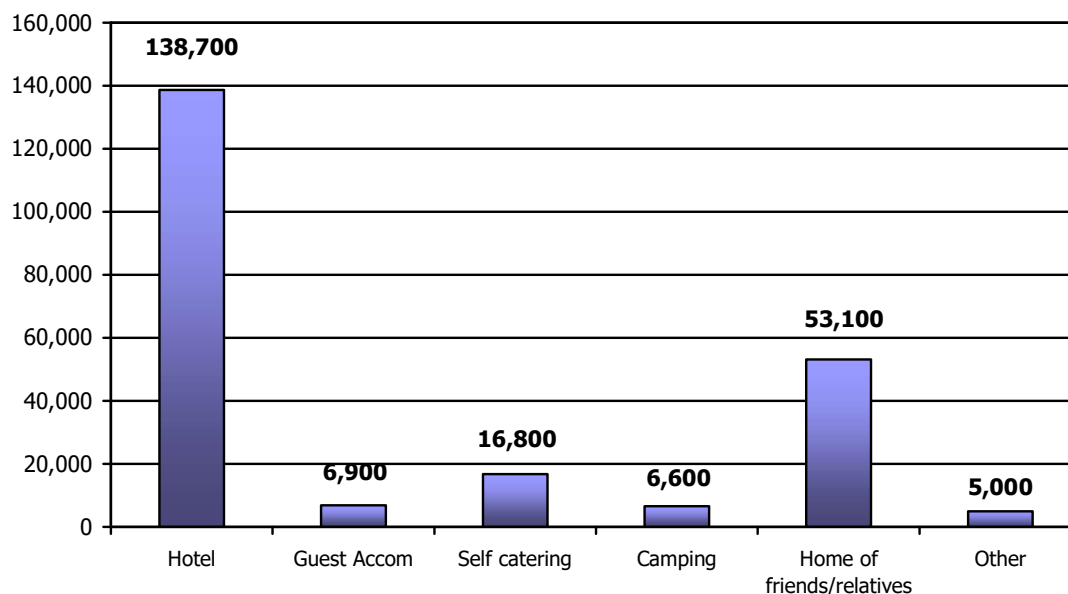
Volume of Visitors by Accommodation Type Q4 2016



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

Over Q4, the number of visitors staying in hotels has increased by 14.0%. The number staying in guest accommodation has decreased by 2.2% and the number of visitors staying in self catering has decreased by 8.7%, while the number of visitors staying with friends or relatives has increased by 2.4%.

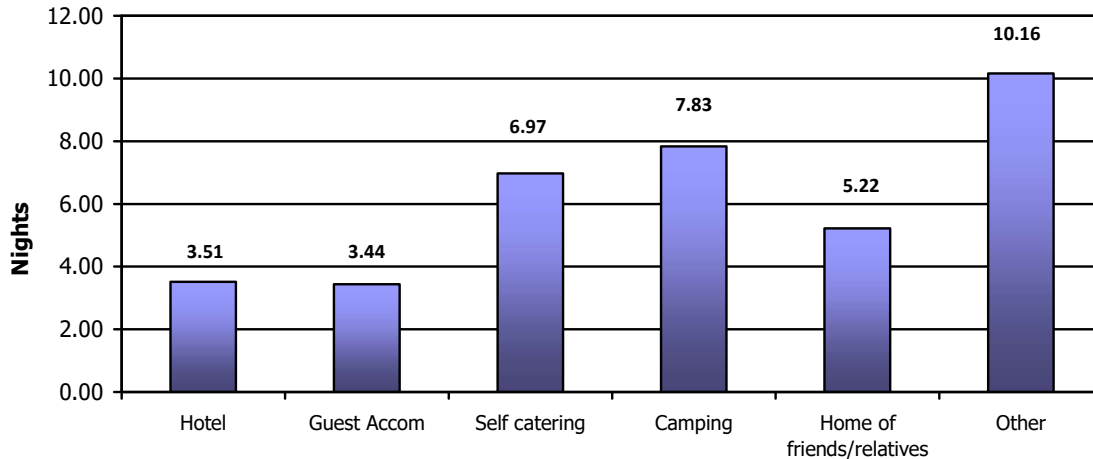
Visitors by Accommodation Type January to December 2016



**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 0.3% while the number staying in guest accommodation has increased by 6.8%. The number of visitors staying in self catering has decreased by 14.8%, the number staying on campsites has increased by 4.5% and the number of visitors staying with friends or relatives has decreased 5.1%.

**Average Length of Stay by Accommodation Type Q4 2016**



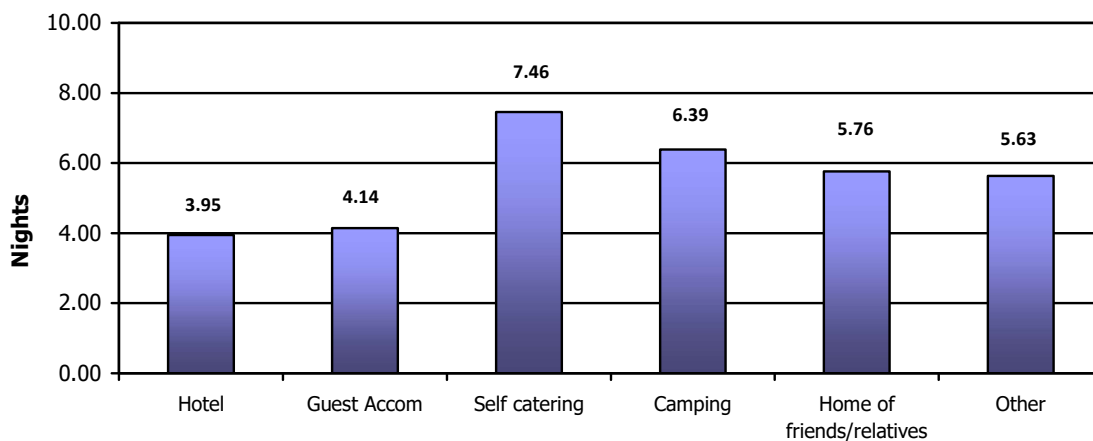
In total, there were **170,900** overnight stays in Guernsey in Quarter 4 2016 (+6.7%), with **100,600** bed nights sold in commercial accommodation (+7.3%).

The full breakdown was as follows:

Hotel bed nights:	86,000
Guest accommodation:	2,700
Self catering:	11,400
Camping:	500
Staying with friends/relatives:	63,200
Other	7,100

The overall average stay in Q4 for those spending at least a night in Guernsey was 4.29 nights, down from 4.39 nights in Q4 2015.

**Average Length of Stay by Accommodation Type Jan to Dec 2016**



Over the whole of 2016, there were **1,078,750** overnight stays in Guernsey (-4.5%), with 744,600 bed nights sold in commercial accommodation (-3.9%).

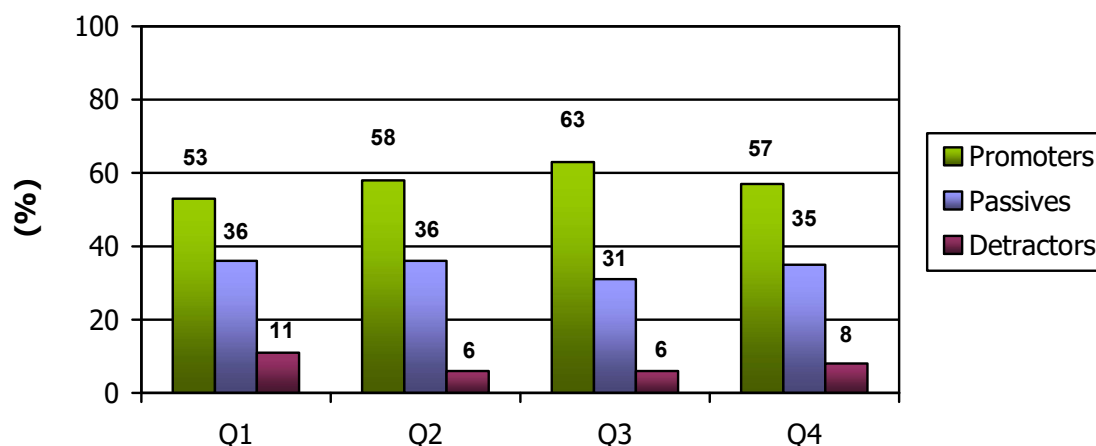
The full breakdown was as follows:

Hotel bed nights:	548,400
Guest accommodation:	28,600
Self catering:	125,500
Camping:	42,100
Staying with friends/relatives:	306,100
Other	28,100

## Recommendation of Guernsey to friends or family

Departing visitors are asked 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 2016**



"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 2016 was 8.41, with the Net Promoter Score being 41.9.  
 The overall average score in Q2 2016 was 8.72, with the Net Promoter Score being 51.5.  
 The overall average score in Q3 2016 was 8.84, with the Net Promoter Score being 56.9.  
 The overall average score in Q4 2016 was 8.60, with the Net Promoter Score being 47.7.

The overall average score in 2016 was 8.70, with the Net Promoter Score being 51.5.

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

	<b><u>Average Score</u></b>	<b><u>Net Promoter Score</u></b>
<b>Overall</b>	<b>8.60</b>	<b>47.7</b>
Staying leisure visitors	8.93	62.2
Leisure day visitors	8.31	40.4
Staying VFR	8.87	58.2
Staying business visitors	8.37	36.7
Business day visitors	8.32	32.9

The results for the whole of 2016 broken down by purpose of visit were as follows:

	<b><u>Average Score</u></b>	<b><u>Net Promoter Score</u></b>
<b>Overall</b>	<b>8.70</b>	<b>51.5</b>
Staying leisure visitors	8.98	63.2
Leisure day visitors	8.23	33.9
Staying VFR	8.96	61.9
Staying business visitors	8.41	38.6
Business day visitors	8.11	26.5

## Onward flights

Residents and departing visitors are asked which airport or destination they are flying on to after the initial destination airport.

Over the period October to December 2016, **17,800** (19.0%) of the 93,790 departing air passengers were flying to an onward final destination.

**14,460** (25.8%) of the 56,020 Guernsey residents travelling by air were flying to an onward destination and **3,340** (8.8%) of the 37,770 visitors to Guernsey departing by air were flying to an onward destination.

The breakdown for Q4 by route was as follows:

	<b><u>Visitor departures</u></b>	<b><u>Visitors travelling onward</u></b>	<b><u>Resident departures</u></b>	<b><u>Residents travelling onward</u></b>
Gatwick	11,380	1,900	27,550	12,080
Southampton	6,440	740	8,890	1,090
Manchester	4,080	110	3,690	280
East Midlands	1,280	0	550	30
Birmingham	2,000	220	1,470	450
Bristol	1,570	0	1,110	160
Exeter	1,650	70	1,780	50
Stansted	1,380	100	1,440	100
London City	1,570	120	1,590	70
Other UK Air	850	0	250	0
<b>TOTAL UK AIR</b>	<b>32,190</b>	<b>3,260</b>	<b>48,320</b>	<b>14,300</b>
Jersey air	5,280	80	7,490	160
Foreign air	300	0	210	0
<b>TOTAL AIR</b>	<b>37,770</b>	<b>3,340</b>	<b>56,020</b>	<b>14,460</b>

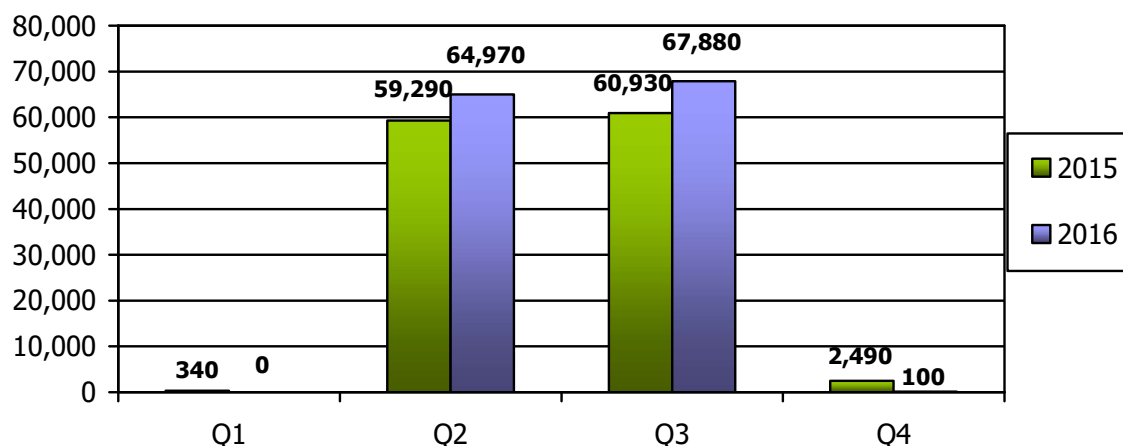
The main destinations/airports that passengers were travelling on to in Q4 were as follows:

1. USA	1,550 passengers	(130 visitors)
2. Canaries	1,340 passengers	(70 visitors)
3. Spanish mainland	1,270 passengers	(40 visitors)
4. Scottish airports	1,170 passengers	(580 visitors)
5. Ireland	820 passengers	(520 visitors)
6. France	750 passengers	(170 visitors)
7. Caribbean	680 passengers	(40 visitors)
8. Switzerland	660 passengers	(200 visitors)
9. Madeira	650 passengers	(30 visitors)
10. Italy	580 passengers	(100 visitors)
11. Portugal (excl. Madeira)	520 passengers	(60 visitors)
12. Netherlands	510 passengers	(180 visitors)
13. Greece	490 passengers	(0 visitors)
14. Germany	480 passengers	(110 visitors)
15. Latvia	410 passengers	(60 visitors)
16. Australia	390 passengers	(50 visitors)
17. Dubai	370 passengers	(10 visitors)
18. Northern Ireland	340 passengers	(170 visitors)
19. Thailand	340 passengers	(50 visitors)
20. South Africa	300 passengers	(60 visitors)
21. Finland	300 passengers	(10 visitors)
22. English airports	290 passengers	(150 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 2015 vs. 2016**



Over Q4, the number of cruise passenger arrivals has decreased by **95.8%** compared to Q4 2015 and the cumulative total over the whole year has increased by **8.0%** from 123,050 in 2015 to 132,950 in 2016.

Over Q1 2016 there were no cruise ship arrivals compared to 1 cruise ship carrying 340 landed passengers in Q1 2015.

In April 2016, there were 10 cruise ships with a total of 13,130 landed passengers compared to 9 cruise ships with a total of 6,740 landed passengers in 2015.

In May 2016, there were 25 cruise ships with a total of 29,130 landed passengers compared to 27 cruise ships with a total of 28,840 landed passengers in 2015.

In June 2016, there were 16 cruise ships with a total of 22,710 landed passengers compared to 19 cruise ships with a total of 23,700 landed passengers in 2015.

In July 2016, there were 16 cruise ships with a total of 23,230 landed passengers compared to 16 cruise ships with a total of 23,680 landed passengers in 2015.

In August 2016, there were 19 cruise ships with a total of 31,420 landed passengers compared to 16 cruise ships with a total of 23,350 landed passengers in 2015.

In September 2016, there were 12 cruise ships with a total of 13,230 landed passengers compared to 15 cruise ships with a total of 13,900 landed passengers in 2015.

Over Q4 2016 there were 2 cruise ship arrivals with 104 landed passengers in October compared to 2 cruise ships carrying 2,490 landed passengers in Q4 2015.

The survey also asks visitors who had visited Guernsey previously whether they had ever visited before on a cruise.

From the 2,070 respondents who answered this question over Q4 2016, 22 said that they had previously visited on a cruise. This represents **1.1%** of previous visitors to Guernsey.

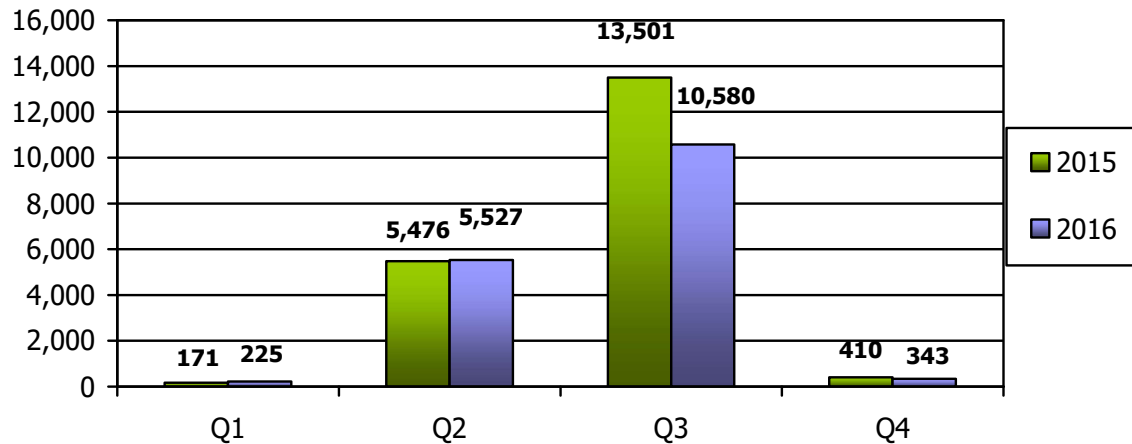
Over the whole of 2016, **1.5%** of those who had visited Guernsey previously had done so on a cruise.



## 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.

**Visiting Yachtsmen by Quarter 2015 vs. 2016**



Over Q4 2016, the number of pleasure passenger arrivals was **343 (-16.3%)** compared to 410 in Q4 2015.

Cumulatively to the end of December, the number of pleasure passenger arrivals has **decreased by 14.7% to 16,675**.

The main decreases have been in July (-26.5%) and August (-22.9%).

## **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 Economic Development 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 2016 definitions in the appendices).

The broad objectives of the 2016 Exit Survey were as follows:

- Determine the passenger composition of each of Guernsey's main air and sea transport routes across the whole of 2016
- 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 2016 quarterly report on passenger departures between October and December (Q4 2016).

### **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 2016, **325 interviewer hours** were allocated to this Passenger Calibration Survey. The exact shift schedules were flexible in order to account for 2016 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 **5,770 interviews, representing 10,730 departing passengers (9.4% of Guernsey's total departing passengers, excluding the Alderney, Sark and Herm routes, over Q4 2016)** - 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 10,700 passengers provides a strong degree of statistical confidence in the results for Q4 2016. 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%
5,800	+/- 0.8	+/- 1.0	+/- 1.2	+/- 1.3	+/- 1.3
2,600	+/- 1.2	+/- 1.5	+/- 1.8	+/- 1.9	+/- 1.9
1,000	+/- 1.9	+/- 2.5	+/- 2.8	+/- 3.0	+/- 3.1
500	+/- 2.6	+/- 3.5	+/- 4.0	+/- 4.3	+/- 4.4

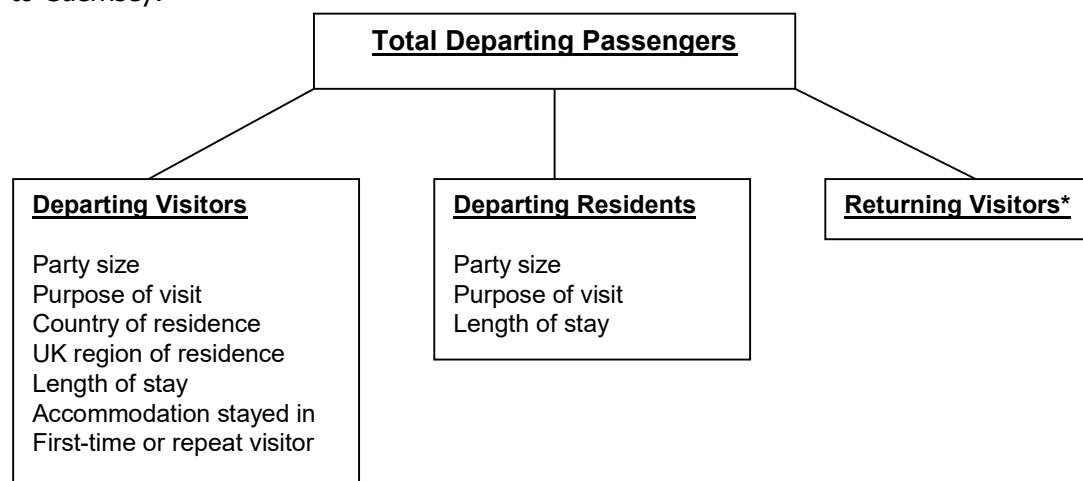
Based upon a total sample size from Q4 of 5,770, a finding that 42.5% of respondents were departing visitors would mean that the true figure for all respondents is 95% likely to be within the range 41.2% to 43.8%, but is more likely to be near the centre of this range (i.e. closer to the survey sample finding). For departing visitors, based upon a sub-sample size of 2,590, the finding that 34.4% were staying leisure visitors would have a statistical variation of between 32.6% and 36.2%. 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' is recorded by interviewers to provide an idea of the potential level of bias caused by interviewee self-selection and was just **5.2%** in Q4 2016. 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 2016, 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.

## 2016 Passenger Departures Including Alderney, Sark and Herm Departures

Cumulative Passenger Departures by Route January – December 2016 (including Alderney, Sark and Herm):

	<b><u>Volume</u></b>	<b><u>% of total pax.</u></b>	<b><u>2016 vs. 2015</u></b>
London Gatwick	155,470	22.0%	-2.3%
Southampton	68,590	9.7%	-3.2%
Manchester	32,610	4.6%	-4.3%
Birmingham	14,170	2.0%	1.2%
London City	13,660	1.9%	17.4%
Exeter	13,570	1.9%	9.7%
East Midlands	13,400	1.9%	-14.0%
Stansted	13,120	1.9%	-1.8%
Bristol	12,390	1.8%	3.1%
Other UK Air	5,230	0.7%	685.1%
<b>Total UK Air</b>	<b>342,200</b>	<b>48.5%</b>	<b>-0.5%</b>
Jersey	57,010	8.1%	-10.6%
Alderney	17,270	2.4%	-4.9%
<b>Total CI Air</b>	<b>74,290</b>	<b>10.5%</b>	<b>-9.3%</b>
Dinard	1,390	0.2%	4.7%
Swiss Air	40	*	-76.3%
Other Foreign Air	4,260	0.6%	21.6%
<b>Total Foreign Air</b>	<b>5,690</b>	<b>0.8%</b>	<b>14.0%</b>
<b>Total Air:</b>	<b>422,180</b>	<b>59.8%</b>	<b>-2.0%</b>
UK Sea	67,410	9.5%	-11.5%
Jersey	38,460	5.5%	-24.3%
Herm	80,420	11.4%	15.3%
Sark	50,950	7.2%	4.2%
St. Malo	37,350	5.3%	-5.1%
Other French Sea	9,330	1.3%	22.5%
Alderney	150	*	143.5%
<b>Total Sea:</b>	<b>284,080</b>	<b>40.2%</b>	<b>-2.9%</b>
<b>Total Departures:</b>	<b>706,260</b>		<b>-2.4%</b>

## 2016 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".

From April 2016, the survey has adopted the common definition of a resident as "someone who lives in Guernsey or has been (or will be) resident in the Island for at least a year".

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.

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