

2016 Travel Survey

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

RESEARCH REPORT ON Q2 2016

July 20th 2016

Table of Contents

	Page No.
Summary of Results	1
Survey Results	3
Breakdown of departing passengers	3
Visitor vs. resident departures 2016 vs. 2015	6
Visitors by air and sea 2016 vs. 2015	7
Visitor and resident departures by month 2016 vs. 2015	8
Visitors by country of residence	9
Staying visitors vs. day visits	9
Accommodation used by staying visitors	10
Average length of stay and bed nights by accommodation type	11
Recommendation of Guernsey	12
Onward flights	13
Cruise passengers	14
Visiting pleasure craft	15
 Appendices	 16
Background and Aims	16
Methodology	16
Interview shifts and achieved sample size	17
Statistical reliability and bias	17
Survey outputs	18
Total passenger departures 2016 vs. 2015	19
Definitions	20
Fieldwork, interviewers & quality control	20
Data preparation & processing	20

Summary of Results for Q2

	<u>2015</u>	<u>2016</u>	<u>% change</u>
Total departing passengers	169,800	157,450	-7.3%
Total departing visitors	91,900	83,850	-8.7%
Departing visitors by air	52,100	51,500	-1.2%
Departing visitors by sea	39,750	32,300	-18.7%
Staying leisure visitors	44,600	41,600	-6.7%
Visiting friends and relatives	17,250	12,700	-26.3%
Staying business / conference	9,500	8,500	-11.1%
Leisure day visits	9,000	9,050	+0.4%
Business day visits	2,700	3,200	+20.1%
Total for the above purposes of visit *	83,100	75,100	-9.6%
Total staying visitors	72,800	66,650	-8.5%
Average length of stay **	4.66 nights	4.35 nights	-6.7%
Total overnight stays (bed nights) **	337,600	287,700	-14.8%
Total staying in commercial accommodation	57,300	52,800	-7.9%
Average stay in commercial accommodation	4.42 nights	4.22 nights	-4.5%
Bed nights in commercial accommodation	253,200	222,600	-12.1%
Day visits	19,050	17,200	-9.8%
UK visitors	63,300	56,550	-10.6%
Jersey visitors	9,800	8,600	-12.3%
Other nationalities	18,800	18,700	-0.6%
Cruise ship passengers ***	59,290	64,970	+9.6%
Visiting yachtsmen ***	5,480	5,530	+0.9%
Departing Guernsey residents	77,800	73,150	-6.0%
Departing residents by air	53,600	53,500	0.0%
Departing residents by sea	24,200	19,600	-19.0%
Net Promoter Score	55.2%	51.5%	

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>2015</u>	<u>2016</u>	<u>% change</u>
Total departing passengers	266,500	250,100	-6.1%
Total departing visitors	128,600	116,100	-9.7%
Departing visitors by air	82,850	80,500	-2.8%
Departing visitors by sea	45,700	35,600	-22.1%
Staying leisure visitors	54,400	49,300	-9.4%
Visiting friends and relatives	28,600	24,000	-16.1%
Staying business / conference	17,100	15,000	-12.4%
Leisure day visits	10,200	9,800	-4.3%
Business day visits	7,600	7,150	-6.1%
Total for the above purposes of visit *	117,900	105,200	-10.8%
Total staying visitors	102,000	92,800	-9.0%
Average length of stay **	4.49 nights	4.26 nights	-5.1%
Total overnight stays (bed nights) **	456,100	392,400	-14.0%
Total staying in commercial accommodation	76,100	68,300	-10.3%
Average stay in commercial accommodation	4.09 nights	3.93 nights	-3.9%
Bed nights in commercial accommodation	311,100	268,500	-13.7%
Day visits	26,600	23,300	-12.5%
UK visitors	91,800	81,400	-11.4%
Jersey visitors	14,350	12,900	-10.0%
Other nationalities	22,400	21,800	-2.7%
Cruise ship passengers ***	59,630	64,970	+9.0%
Visiting yachtsmen ***	5,650	5,750	+1.9%
Departing Guernsey residents	137,500	133,350	-3.0%
Departing residents by air	106,750	108,500	+1.6%
Departing residents by sea	30,700	24,850	-19.1%
Net Promoter Score	54.6%	48.6%	

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

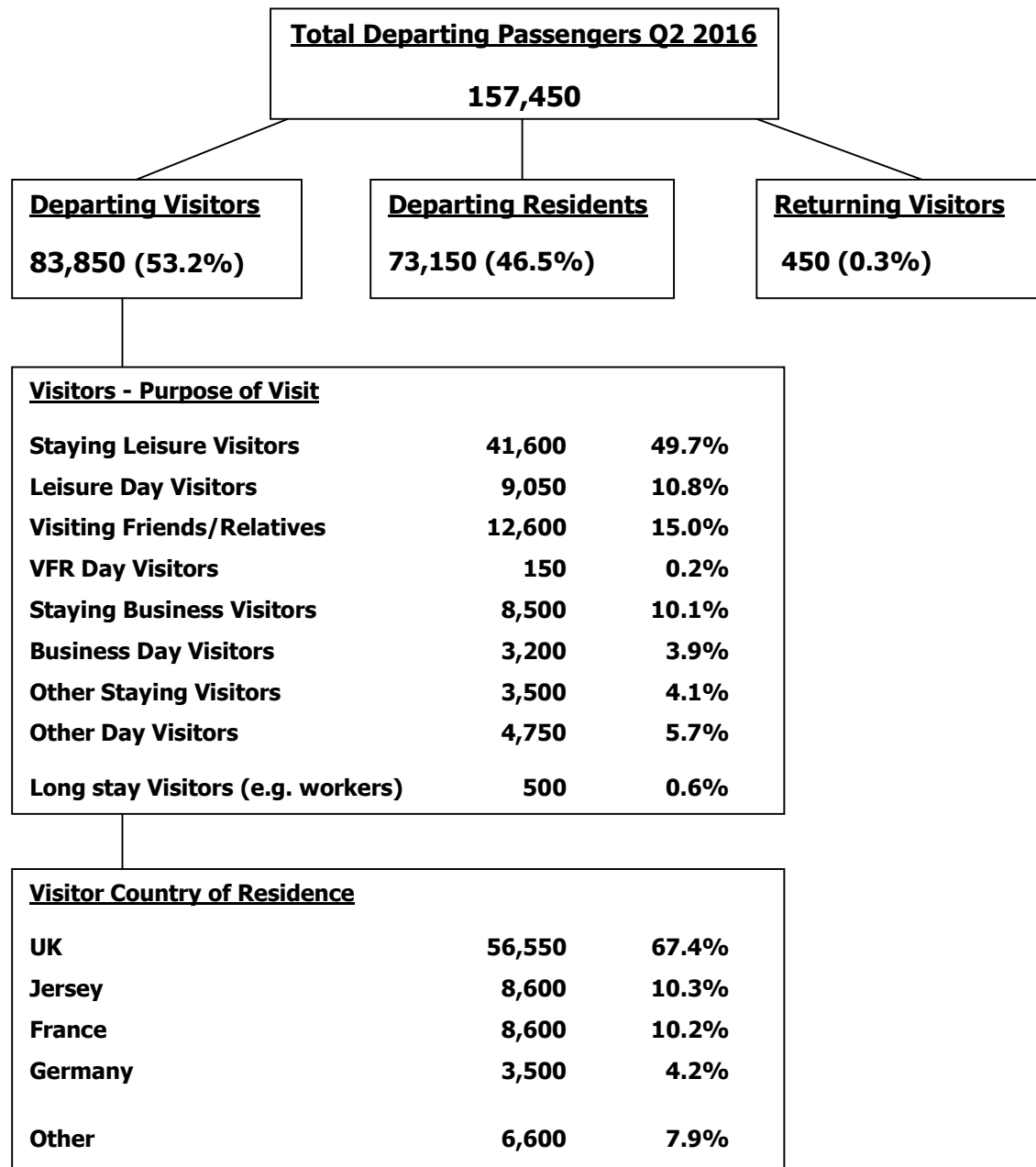
*** These figures exclude "Other staying", "Other day" and "Long stay" visitors as shown in the breakdown on page 2 and as defined in the appendices.**

**** 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

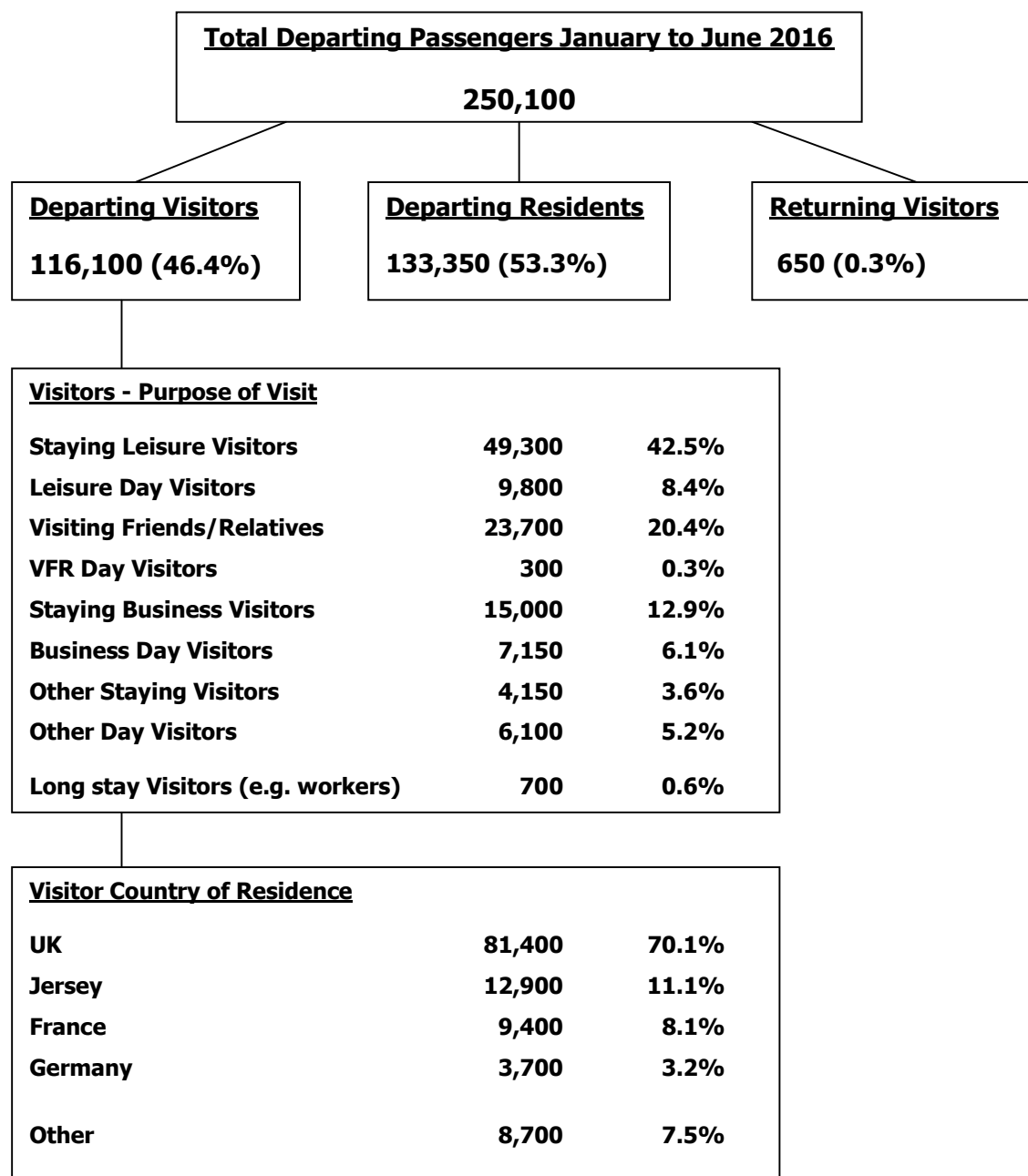
Excluding the Alderney, Sark and Herm routes, the passenger numbers for the **second quarter** of 2016 were broken down as follows:



In addition to the above, there were **64,970 passengers on cruise ships** and **5,530 visiting yachtsmen** arriving in Guernsey over the period April to June.

Cumulative Survey Results – January to June

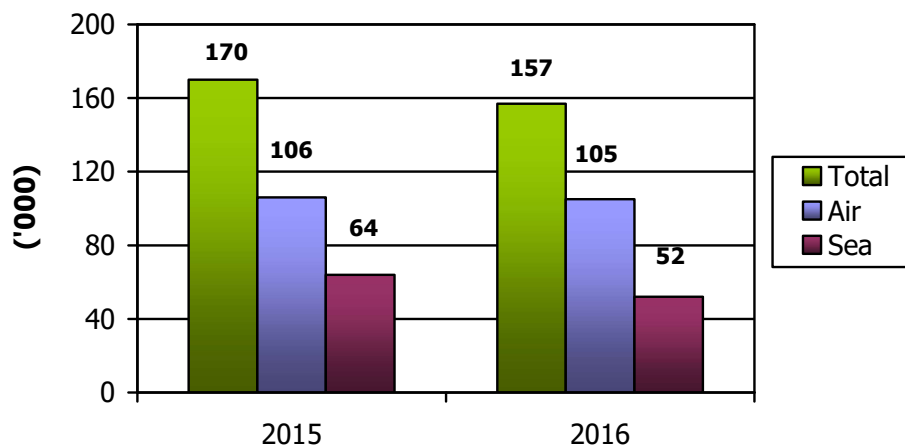
Excluding the Alderney, Sark and Herms routes, the passenger numbers for the **first and second quarters** of 2016 were broken down as follows:



In addition to the above, there have been **64,970 passengers on cruise ships** and **5,750 visiting yachtsmen** arriving in Guernsey up to the end of June.

Comparisons with 2015

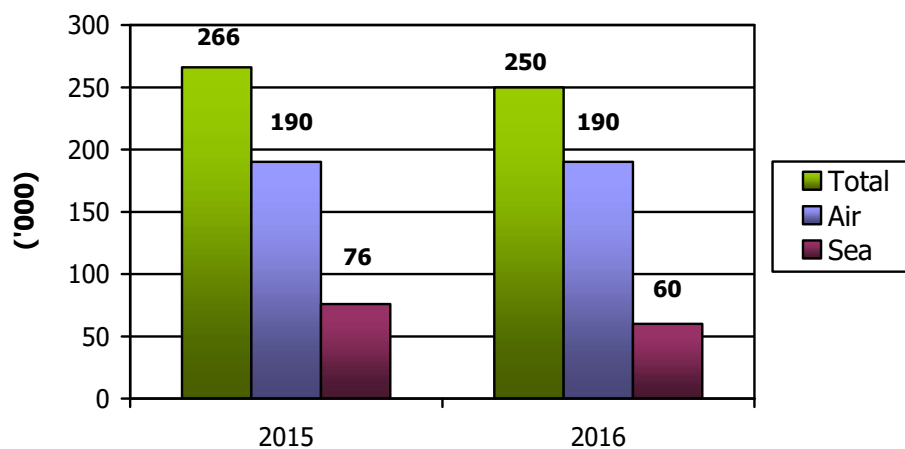
Passenger Departures Q2 2015 and 2016



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

Compared to Quarter 2 2015, there has been a 7.3% decrease in passenger departures from Guernsey, with a 0.3% decrease in passenger departures by air and an 18.8% decrease in passenger departures by sea.

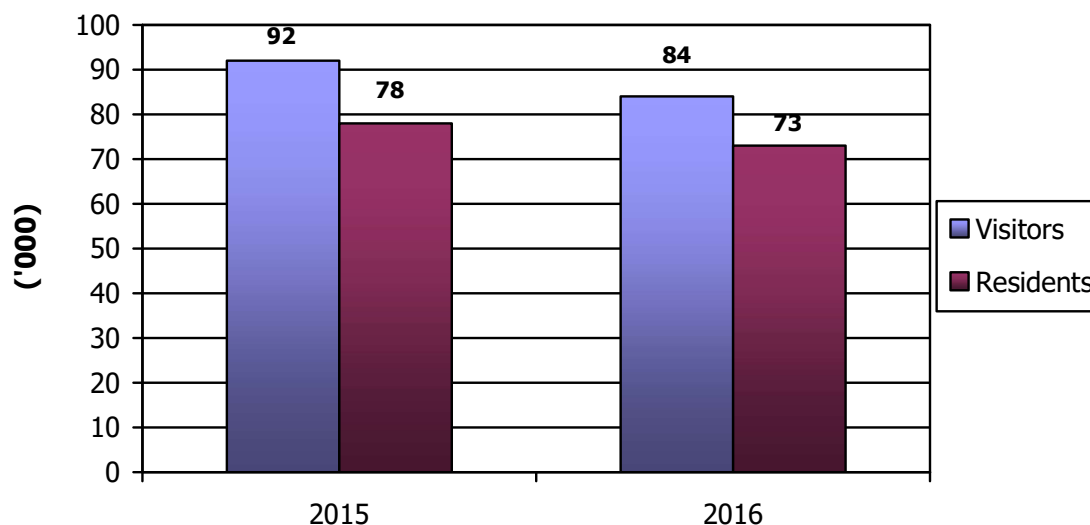
Passenger Departures January to June 2015 and 2016



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

Compared to the first 6 months of 2015, there has been a 6.1% decrease in passenger departures from Guernsey, with a 0.2% decrease in passenger departures by air and a 20.9% decrease in passenger departures by sea.

Visitors vs. Residents Q2 2015 and 2016



Excluding travel from within the Bailiwick, there were **83,850 visitor departures** between April and June 2016 and **73,150 resident departures**.

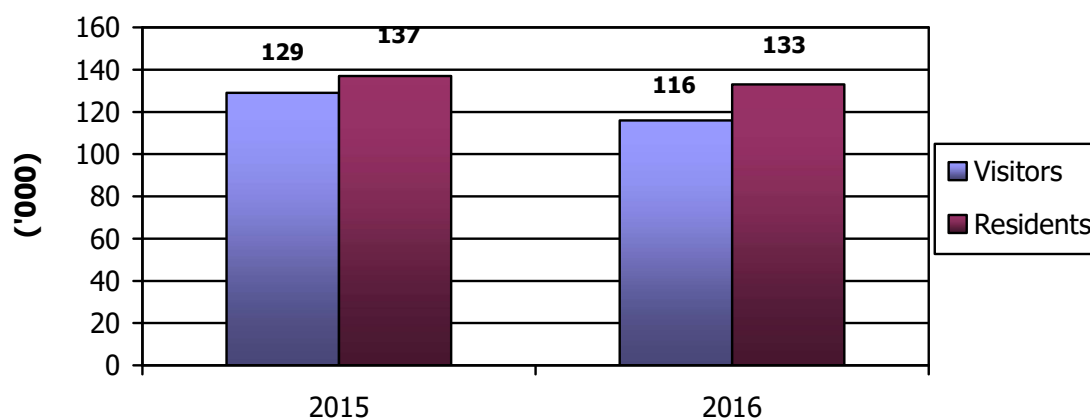
Visitor departures have **decreased overall by 8.7%** compared to Quarter 2 2015.

Excluding "returning visitors", 53.2% of departing passengers in Quarter 2 2016 were visitors to Guernsey, compared to 54.2% over the same period in 2015.

For air passengers, 51,500 (48.9%) were departing visitors and 53,500 were departing residents.

For sea passengers, 32,300 (62.2%) were departing visitors and 19,600 were departing residents.

Visitors vs. Residents January to June 2015 and 2016



Excluding travel from within the Bailiwick, there were **116,100 visitor departures** between January and June 2016 and **133,350 resident departures**.

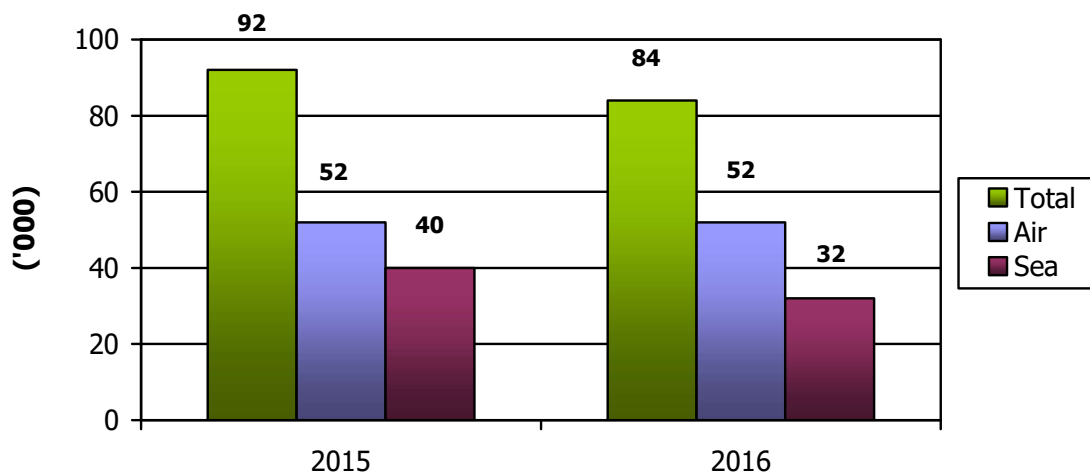
Visitor departures have **decreased overall by 9.7%** compared to the same period in 2015.

Excluding the 650 "returning visitors", 46.4% of departing passengers over the first 6 months of 2016 were visitors to Guernsey, compared to 48.3% over the same period in 2015.

For air passengers, 80,500 (42.5%) were departing visitors and 108,500 were departing residents.

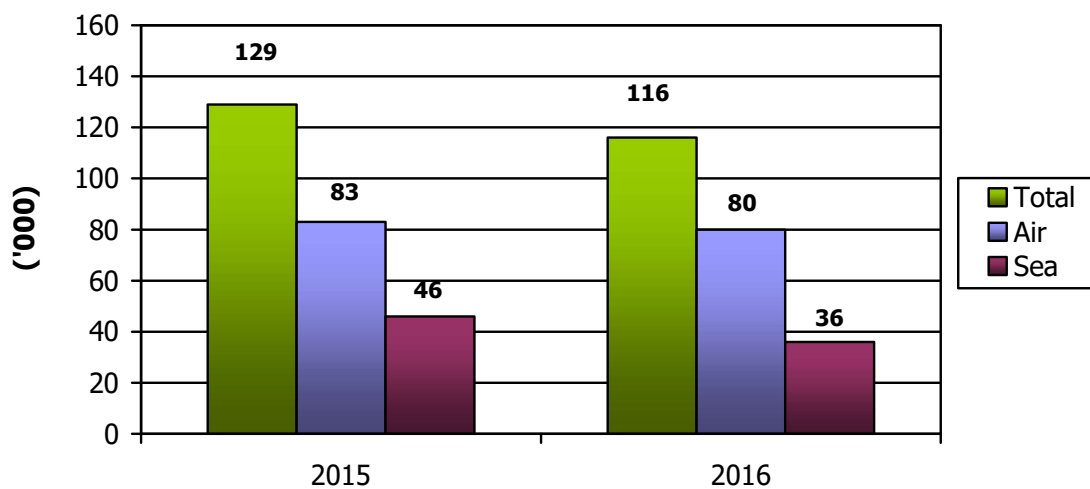
For sea passengers, 35,600 (58.9%) were departing visitors and 24,850 were departing residents.

Visitor Volumes by Travel Method Q2 2015 and 2016



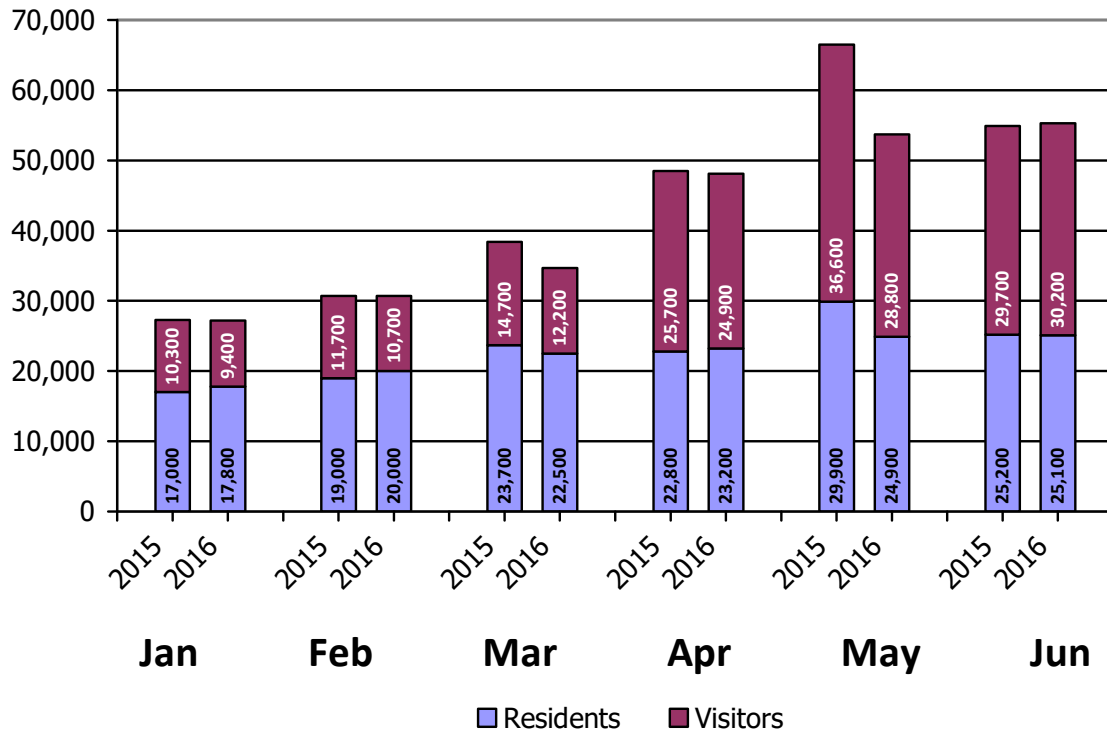
Compared to Quarter 2 2015, there has been a 1.2% decrease in visitors to Guernsey by air and an 18.7% decrease in visitors by sea.

January-June Visitor Volumes by Travel Method 2015 and 2016



Compared to the first 6 months of 2015, there has been a 2.8% decrease in visitors to Guernsey by air and a 22.1% decrease in visitors by sea.

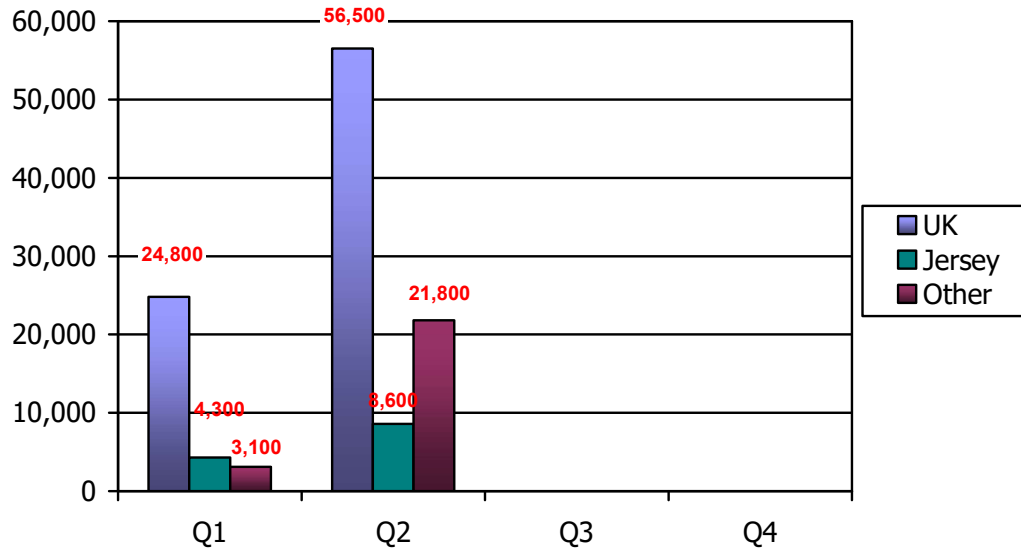
Visitor and Resident Departures by Month 2015 and 2016



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.

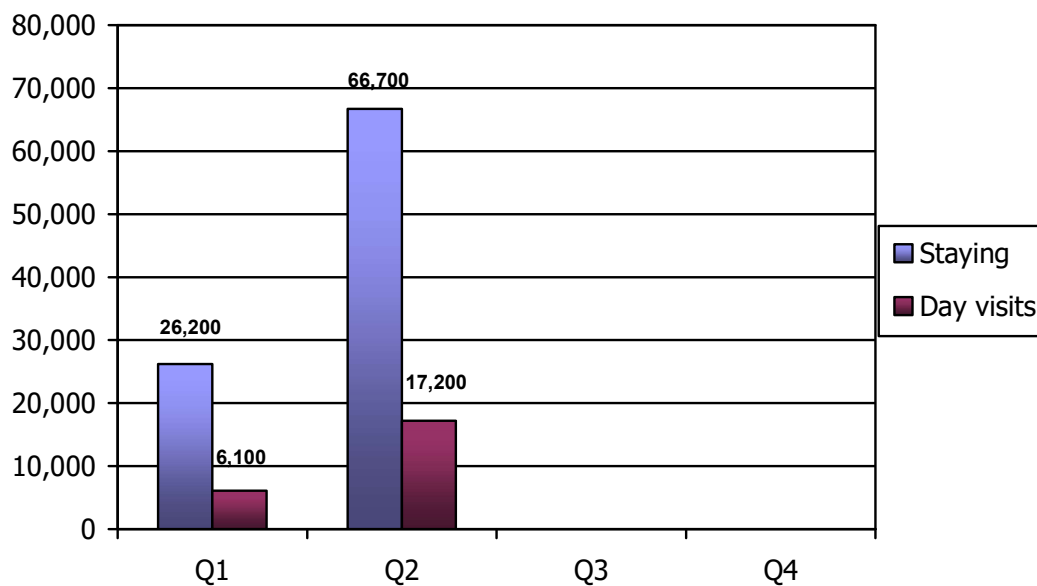
Visitor Country of Residence by Quarter 2016



67.4% of visitors to Guernsey in Quarter 2 2016 were resident in the UK, with **10.3%** coming from Jersey and the remaining **22.3%** coming from other countries.

Up to the end of June, the number of UK visitors has decreased by 11.4% while the number of visitors from Jersey has decreased by 10.0% and the number of visitors from other markets has decreased by 2.7%.

Staying Visitors vs. Day Visits by Quarter 2016

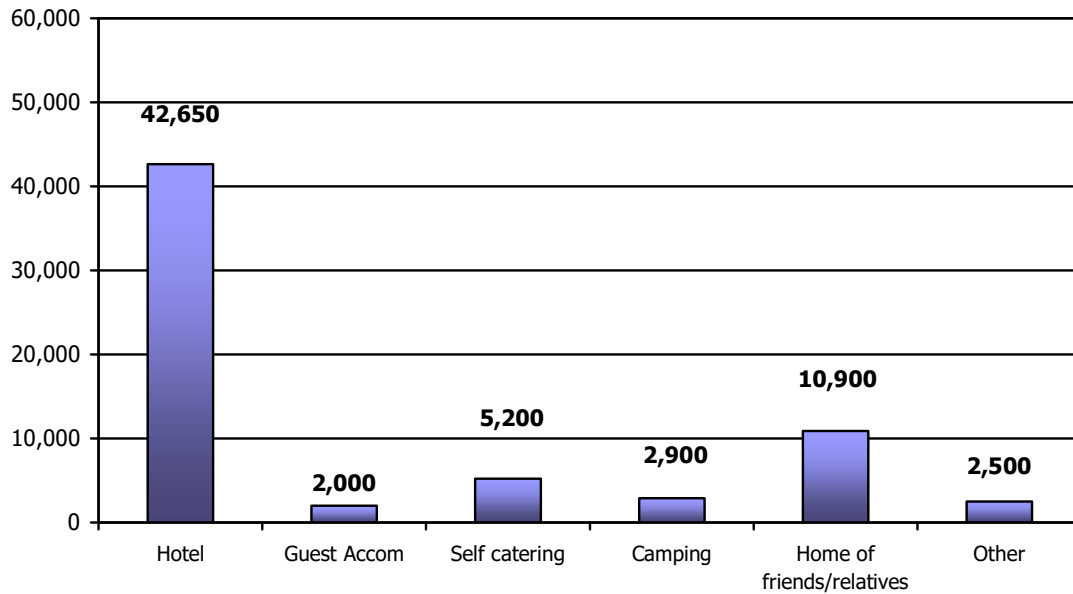


Compared to Quarter 2 2015, there has been an 8.5% decrease in visitors staying in Guernsey for at least 1 night, and a 9.8% decrease in day visits to Guernsey.

Cumulatively to the end of June, staying visitors have decreased by 9.0% compared to 2015, while day visits have decreased by 12.5%.

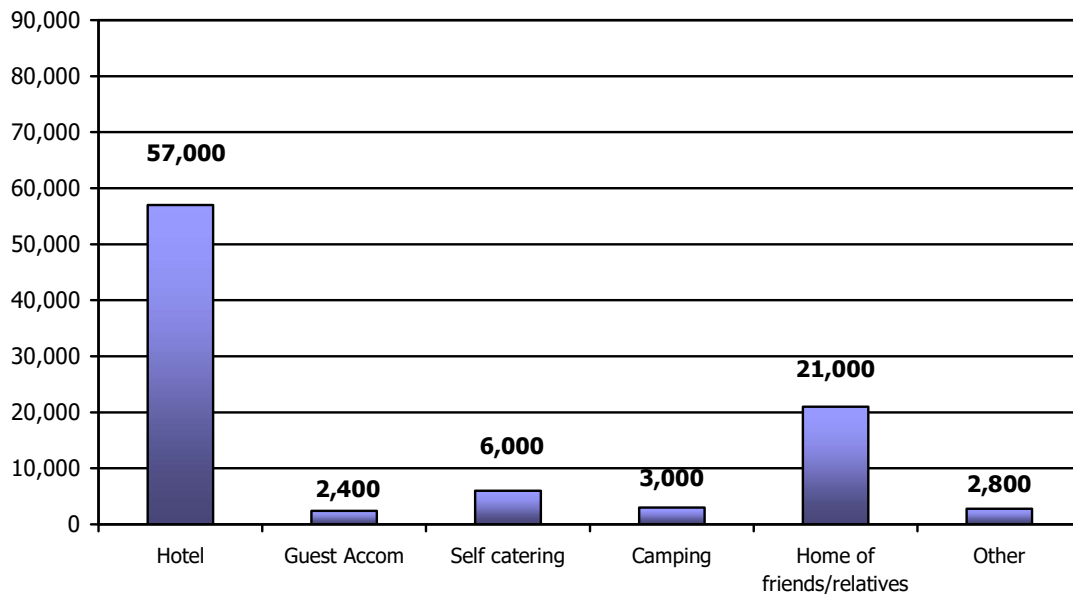
Accommodation used by Staying Visitors in Quarter 2 2016

Volume of Visitors by Accommodation Type Q2 2016



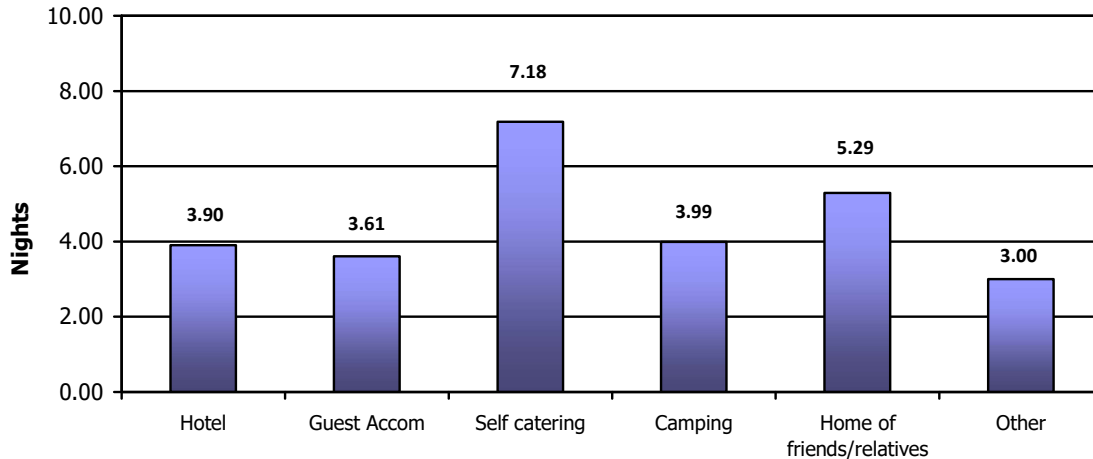
N.b. The above excludes long stay visitors (e.g. workers)

Visitors by Accommodation Type January to June 2016



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

Average Length of Stay by Accommodation Type Q2 2016



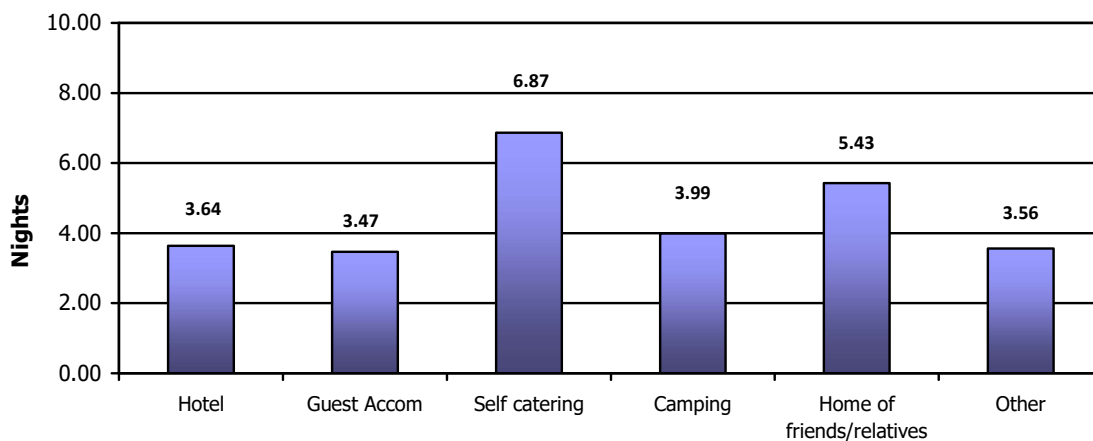
In total, there were **287,700** overnight stays in Guernsey in Quarter 2 2016 (-14.8%), with **222,600** bed nights sold in commercial accommodation (-12.1%).

The full breakdown was as follows:

Hotel bed nights:	166,500
Guest accommodation:	7,300
Self catering:	37,000
Camping:	11,700
Staying with friends/relatives:	57,600
Other	7,500

The overall average stay in Q2 for those spending at least a night in Guernsey was 4.35 nights, down from 4.66 nights in Q2 2015.

Average Length of Stay by Accommodation Type Jan to Jun 2016



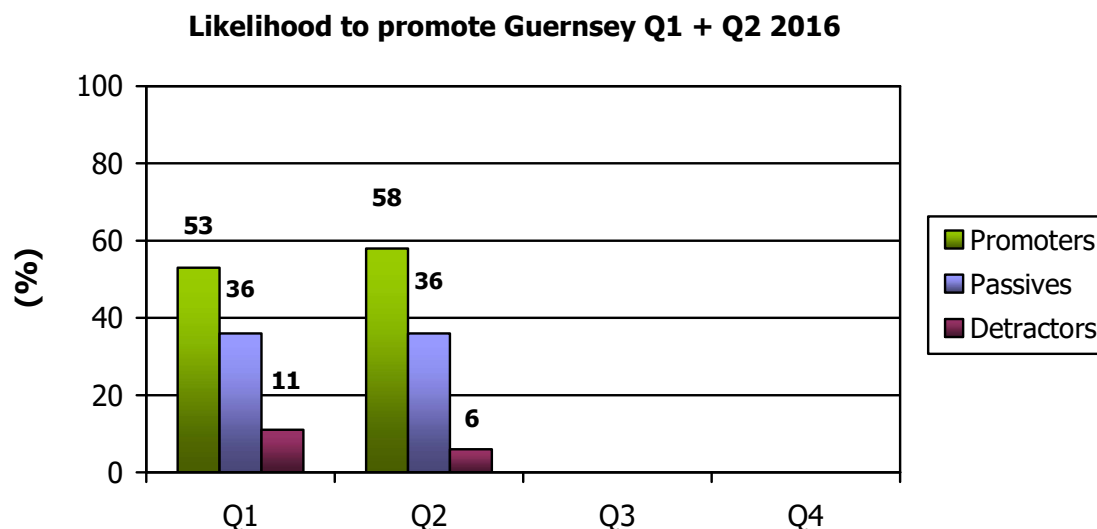
Over the first 6 months of 2016, there were **392,400** overnight stays in Guernsey (-14.0%), with 268,500 bed nights sold in commercial accommodation (-13.7%).

The full breakdown was as follows:

Hotel bed nights:	207,400
Guest accommodation:	8,300
Self catering:	41,000
Camping:	11,800
Staying with friends/relatives:	113,900
Other	10,000

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.



"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 up to June 2016 was 8.63, with the Net Promoter Score being 48.6.

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

	<u>Average Score</u>	<u>Net Promoter Score</u>
Overall	8.72	51.5
Staying leisure visitors	8.92	59.5
Leisure day visitors	8.25	30.0
Staying VFR	9.01	63.8
Staying business visitors	8.53	43.4
Business day visitors	8.22	30.4

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

	<u>Average Score</u>	<u>Net Promoter Score</u>
Overall	8.63	48.6
Staying leisure visitors	8.90	59.3
Leisure day visitors	8.21	30.6
Staying VFR	8.89	59.3
Staying business visitors	8.43	40.8
Business day visitors	8.09	26.3

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 April to June 2016, **20,300** (19.3%) of the 105,100 departing air passengers were flying to an onward final destination.

15,400 (28.7%) of the 53,500 Guernsey residents travelling by air were flying to an onward destination and **4,900** (9.5%) of the 51,500 visitors to Guernsey departing by air were flying to an onward destination.

The breakdown by route was as follows:

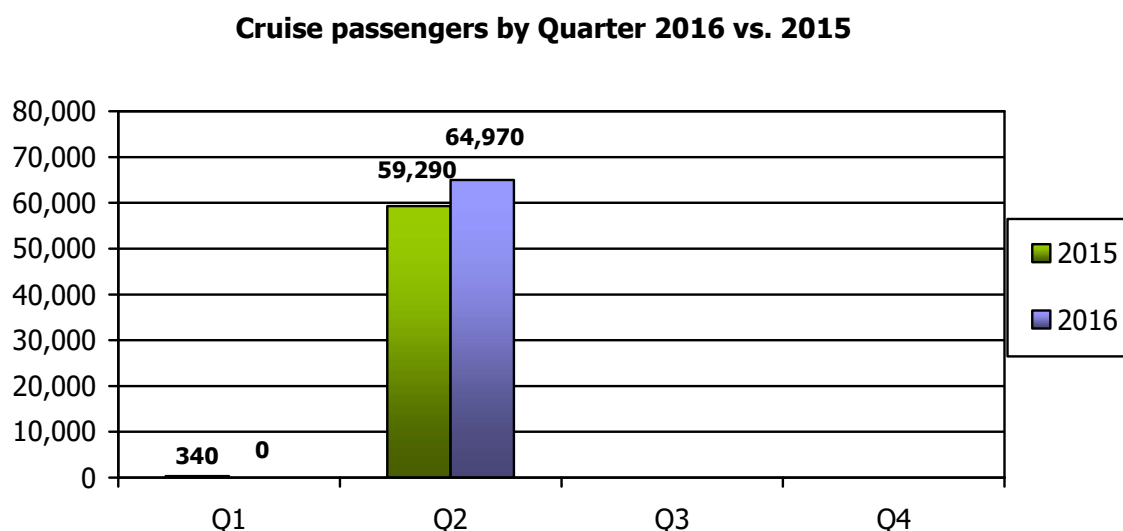
	<u>Visitor departures</u>	<u>Visitors travelling onward</u>	<u>Resident departures</u>	<u>Residents travelling onward</u>
Gatwick	14,570	1,640	25,260	13,020
Southampton	8,440	910	9,080	720
Manchester	5,330	50	3,330	240
East Midlands	2,810	20	1,230	30
Birmingham	2,680	600	1,040	370
Stansted	2,480	210	920	290
Bristol	2,040	0	1,100	20
Exeter	2,150	60	1,170	100
London City	2,090	570	1,450	190
Other UK Air	990	0	200	0
TOTAL UK AIR	43,580	4,040	44,780	14,980
Jersey air	6,510	840	8330	390
Foreign air	1,440	40	430	0
TOTAL AIR	51,530	4,910	53,540	15,370

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

1. USA	1,950 passengers	(140 visitors)
2. Canary Islands	1,910 passengers	(0 visitors)
3. Scottish airports	1,710 passengers	(970 visitors)
4. Spanish mainland	1,340 passengers	(30 visitors)
5. Italy	1,000 passengers	(50 visitors)
6. Switzerland	960 passengers	(670 visitors)
7. Portugal (excl. Madeira)	830 passengers	(40 visitors)
8. France	820 passengers	(290 visitors)
9. Netherlands	780 passengers	(220 visitors)
10. Germany	700 passengers	(370 visitors)
11. Ireland	680 passengers	(320 visitors)
12. Other English airports	580 passengers	(370 visitors)
13. Balearic Islands	510 passengers	(0 visitors)
14. Caribbean	510 passengers	(10 visitors)
15. Greece & Islands	470 passengers	(10 visitors)
16. Northern Ireland	460 passengers	(160 visitors)
17. Madeira	440 passengers	(0 visitors)
18. Latvia	420 passengers	(80 visitors)
19. Canada	370 passengers	(120 visitors)
20. Czech Republic	360 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.



Over Q2, the number of cruise passenger arrivals has increased by **9.6%** compared to Q2 2015 and the cumulative total to the end of June has also increased by **9.0%**.

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.

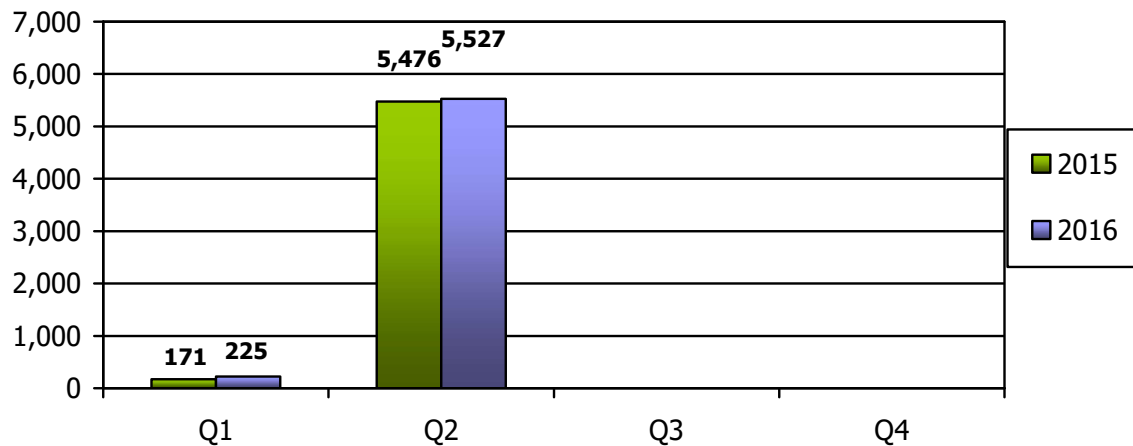
The survey also asks visitors who had visited Guernsey previously whether they had ever visited before on a cruise.

From the 2,838 respondents who answered this question over Q2 2016, 64 said that they had previously visited on a cruise. This represents **2.3%** 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 2015 vs. 2016



Over Q2 2016, the number of pleasure passenger arrivals was **5,527 (+0.9%)** compared to 5,476 in Q2 2015.

Cumulatively to the end of June, the number of pleasure passenger arrivals has **risen by 1.9%** from 5,647 in 2015 to 5,752 in 2016.

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 2016 definitions in the appendices).

The broad objectives of the 2016 Exit Survey are 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 second 2016 quarterly report on passenger departures between April and June (Q2 2016).

Methodology

As with previous exit surveys, face-to-face interviews are being conducted with departing passengers throughout 2016, 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 2016, **415 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 Q2 therefore comes from **7,290 interviews, representing 16,680 departing passengers (10.6% of Guernsey's total departing passengers, excluding the Alderney, Sark and Herm routes, over Q2 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 16,000 passengers provides a strong degree of statistical confidence in the results for Q2 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 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.

Sample Size	Research Results				
	10% or 90%	20% or 80%	30% or 70%	40% or 60%	50%
7,300	+/- 0.7	+/- 0.9	+/- 1.0	+/- 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

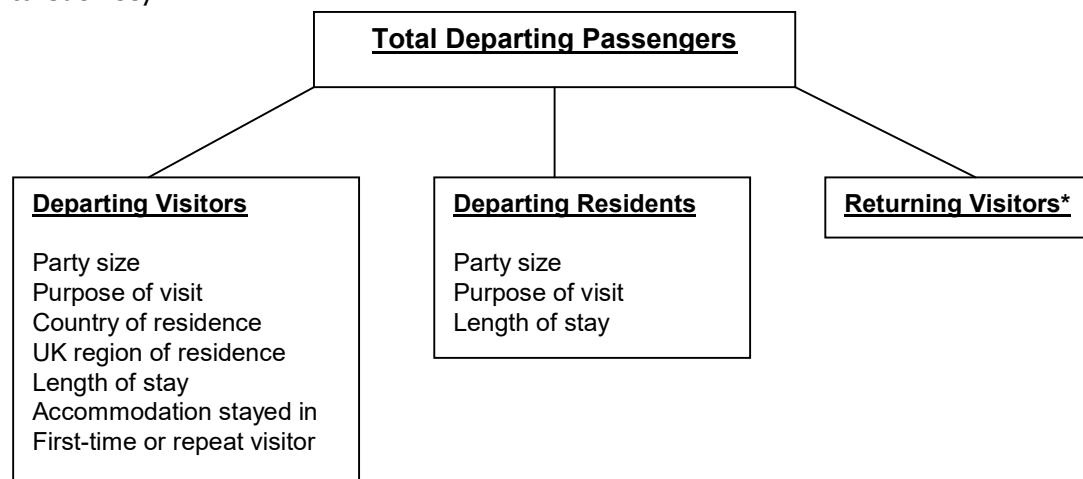
Based upon a total sample size from Q2 of 7,300, a finding that 53.3% of respondents were departing visitors would mean that the true figure for all respondents is 95% likely to be within the range 52.1% to 54.5%, but is more likely to be near the centre of this range (i.e. closer to the survey sample finding). For departing visitors, based upon a sub-sample size of 4,000, the finding that 49.7% were staying leisure visitors would have a statistical variation of between 48.1% and 51.3%. 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 **5.7%** in Q2 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 Sark, Herm or 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 – June 2016 (including Alderney, Sark and Herm):

	<u>Volume</u>	<u>% of total pax.</u>	<u>2016 vs. 2015</u>
London Gatwick	72,370	23.7%	-1.9%
Southampton	33,830	11.1%	3.0%
Manchester	14,240	4.7%	-2.9%
Birmingham	6,430	2.1%	-1.4%
East Midlands	6,040	2.0%	-3.7%
Exeter	5,970	1.9%	-0.1%
London City	6,510	2.1%	14.1%
Stansted	5,020	1.6%	-2.8%
Bristol	5,140	1.7%	1.6%
Other UK Air	1,240	0.4%	418%
Total UK Air	156,790	51.3%	0.4%
Jersey	30,070	9.8%	-4.9%
Alderney	7,980	2.6%	-4.2%
Total CI Air	38,040	12.5%	-4.7%
Dinard	740	0.2%	20.0%
Swiss Air	30	*	-57.5%
Other Foreign Air	1,990	0.7%	30.6%
Total Foreign Air	2,760	0.9%	24.8%
Total Air:	197,590	64.7%	-0.4%
UK Sea	25,320	8.3%	-23.5%
Jersey	17,170	5.6%	-27.6%
Herm	28,230	9.2%	6.7%
Sark	19,240	6.3%	0.3%
St. Malo	14,430	4.7%	-8.2%
Other French Sea	3,570	1.2%	-8.6%
Alderney	0	0.0%	-100%
Total Sea:	107,960	35.3%	-11.6%
Total Departures:	305,550		-4.7%

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 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 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 on 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