

2013 Travel Survey

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

RESEARCH REPORT ON Q3 2013

15th November 2013

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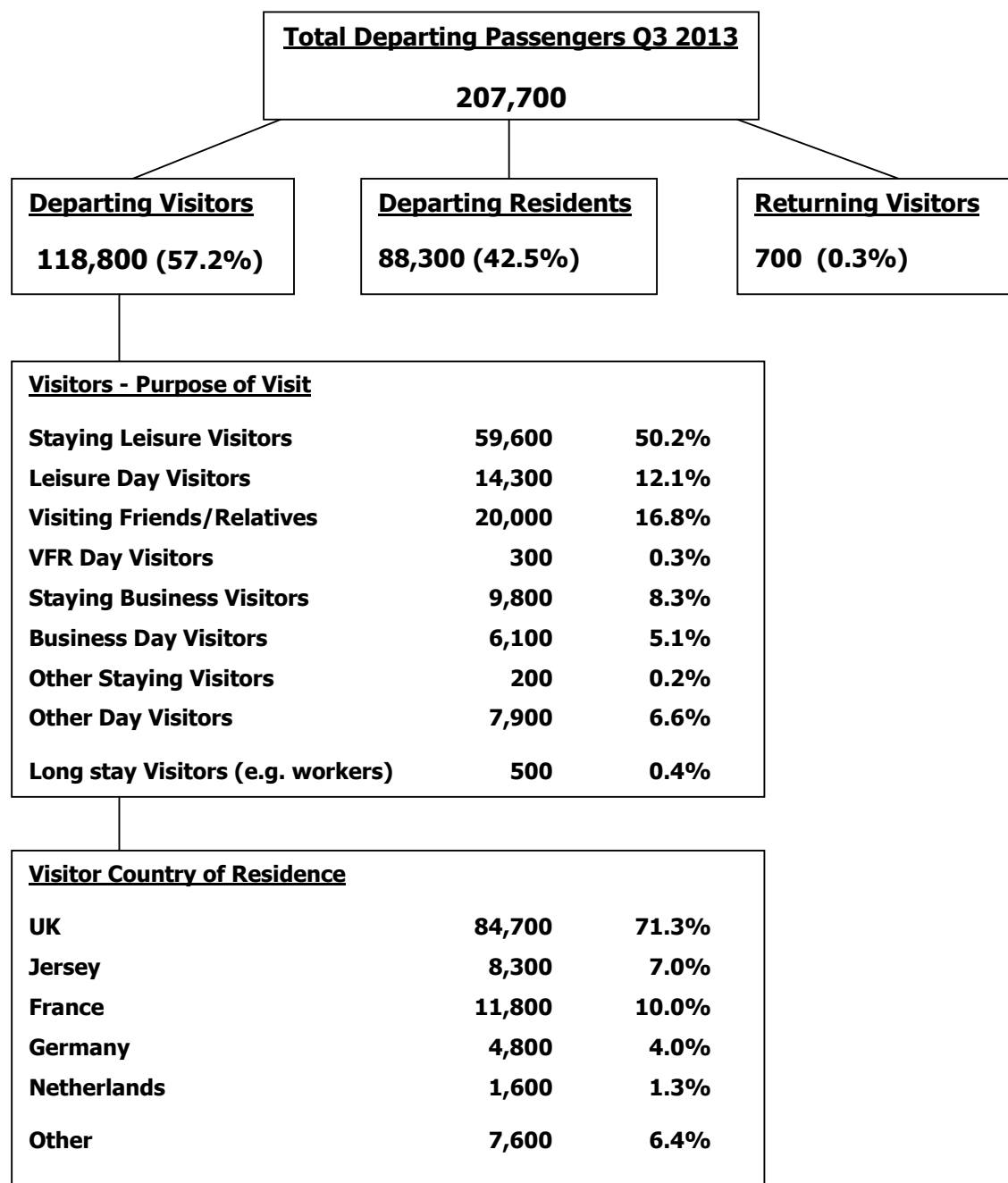
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Summary of Results

- Excluding the inter-Bailiwick routes, there were **207,4700** (+2.5%) departing passengers from the Bailiwick over the period July through to September 2013. Over the first 9 months of 2013, there have been **468,400** departing passengers, representing an increase of 0.4% (2,000 passengers) compared to the same period in 2012.
- Over Q3, there were **122,100** passenger departures by air (-1.8%) and **85,600** departures by sea (+9.4%). Cumulatively to the end of September there have been **311,200** departures by air (-1.4%) and **157,200** departures by sea (+4.3%).
- Over the first 9 months of 2013, the air routes to show increases in passenger departures have been Gatwick, Southampton, Manchester and East Midlands, with the Birmingham and Stansted routes showing the main falls. Sea departures on the UK and Jersey routes have increased, but have fallen on the French sea routes.
- In Q3 alone, there were **118,800** (-5.7%) visitor departures and **88,300** (+16.1%) resident departures. As at the end of September, there have been **254,500** (-3.1%) visitor departures and **212,600** (+5.0%) resident departures.
- In Q3, **69,200** visitors departed on the air routes and **49,600** departed by sea.
- Over the period January to September, staying leisure visitors were down by 5.6% to **115,300**, staying business visitors were down by 12.2% to **30,600**, those visiting friends and relatives were up by 20% to **43,000**, leisure day visits were down by 4.0% to **27,700**, and business day visits were down by 1.4% to **21,400**.
- To the end of September, there has been a 2.9% decrease in visitors staying in Guernsey to **190,600** and a 3.7% decrease in day visits to **63,900**.
- **141,300** visitors stayed in commercial accommodation up to the end of September, representing **639,100** bed nights sold. **45,700** visitors stayed with friends or family in Guernsey.
- To the end of September, there have been **176,900** visitors to Guernsey from the UK, **25,600** visitors from Jersey, **23,300** visitors from France, **9,600** visitors from Germany and **19,100** visitors from other markets.

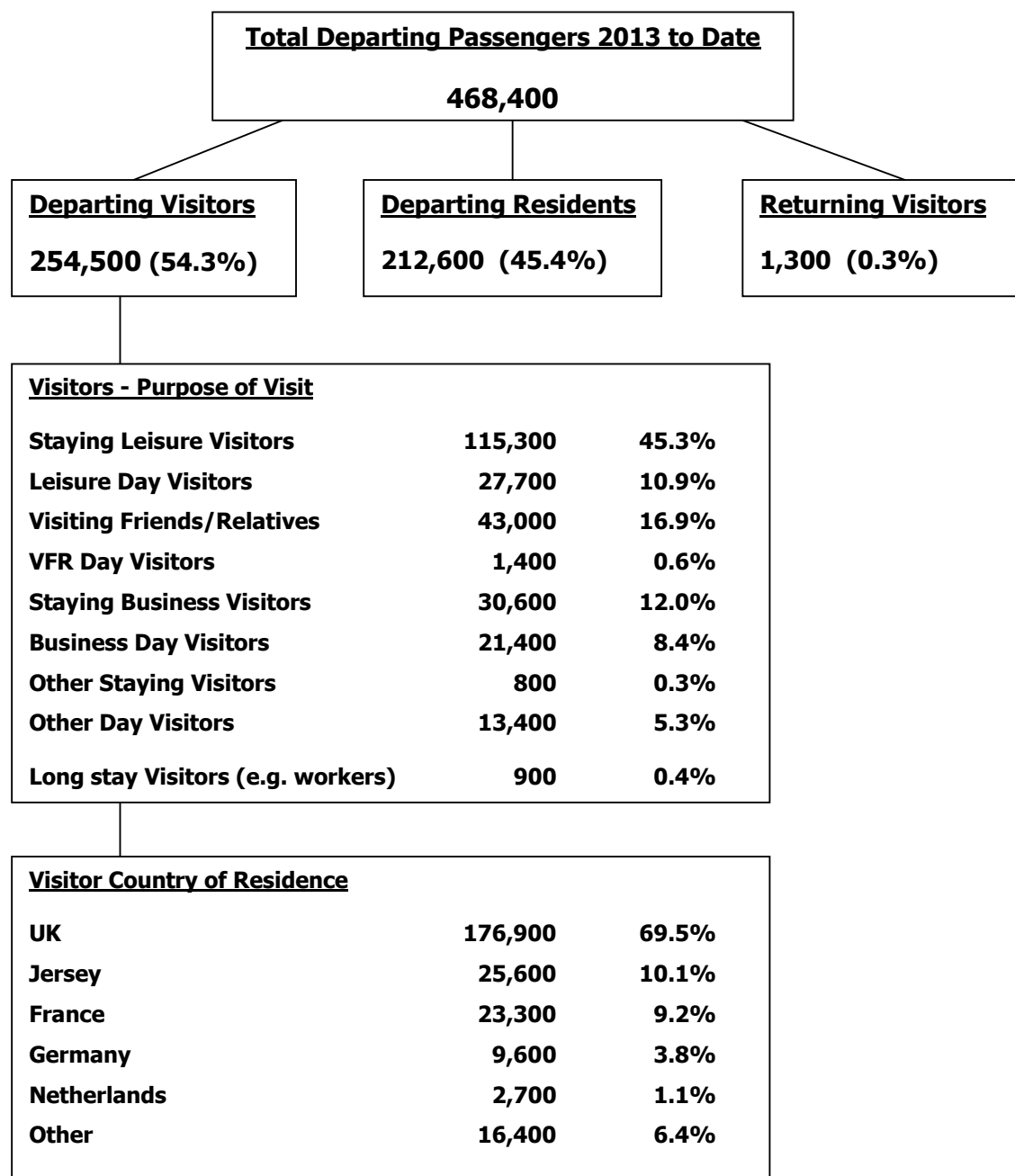
Q3 Survey Results – Excluding Alderney, Sark and Herm Departures

Excluding the Alderney, Sark and Herms routes, the passenger numbers for the **third quarter** of 2013 were broken down as follows:



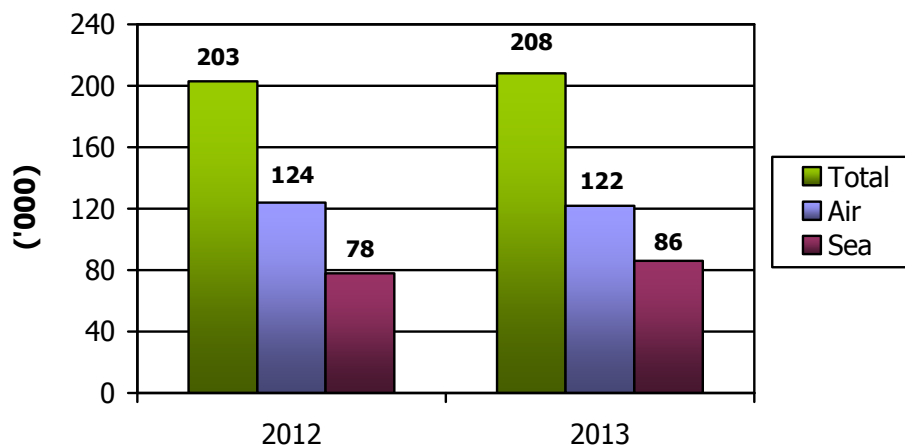
Cumulative Survey Results – January to September

Excluding the Alderney, Sark and Herm routes, the passenger numbers for the **first, second and third quarters** of 2013 were broken down as follows:



Comparisons with 2012

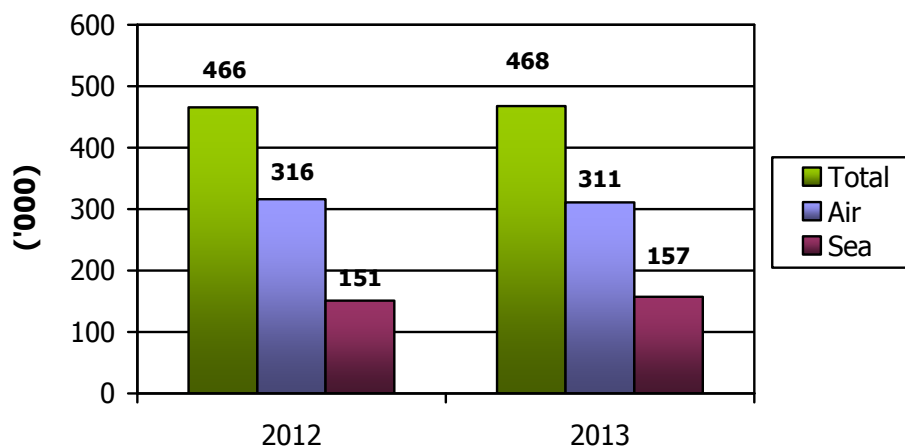
Passenger Departures Q3 2012 and 2013



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

Compared to Quarter 3 2012, there has been a 2.5% increase in passenger departures from Guernsey, with a 1.8% decrease in passenger departures by air and a 9.4% increase in passenger departures by sea.

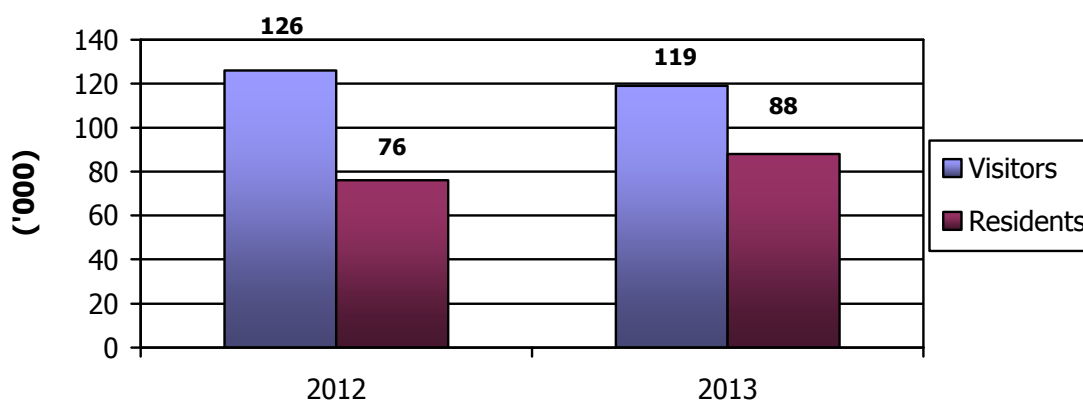
Passenger Departures January to September 2012 and 2013



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

Compared to January to September 2012, there has been a 0.4% increase in passenger departures from Guernsey, with a 1.4% decrease in passenger departures by air and a 4.3% increase in passenger departures by sea.

Visitors vs. Residents Q3 2012 and 2013



Excluding travel from within the Bailiwick, there were **118,800 visitor departures** between July and September 2013 and **88,300 resident departures**.

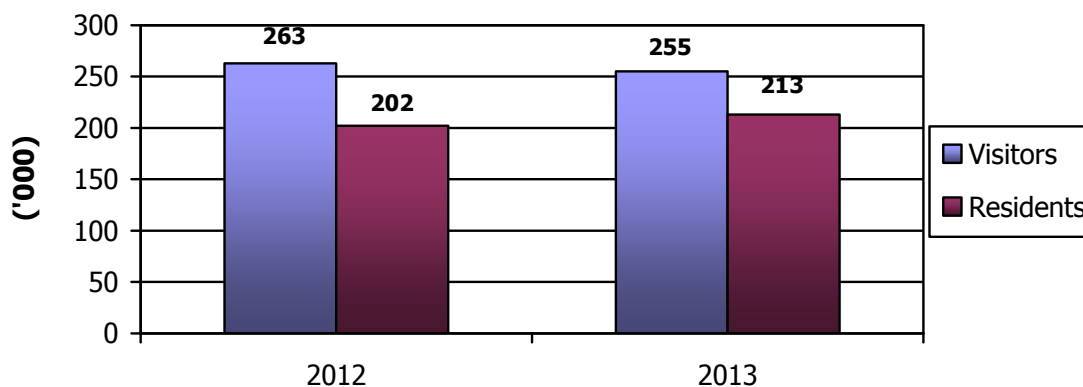
Visitor departures have **decreased overall by 5.7%** compared to Quarter 3 2012.

Excluding the 700 "returning visitors", 57% of departing passengers in Quarter 3 2013 were visitors to Guernsey, compared to 62% over the same period in 2012.

For air passengers, 69,200 (56.7%) were departing visitors and 52,700 (43.2%) were departing residents.

For sea passengers, 49,600 (57.9%) were departing visitors and 35,500 (41.5%) were departing residents.

Visitors vs. Residents January to September 2012 and 2013



Excluding travel from within the Bailiwick, there were **254,500 visitor departures** between January and September 2013 and **212,600 resident departures**.

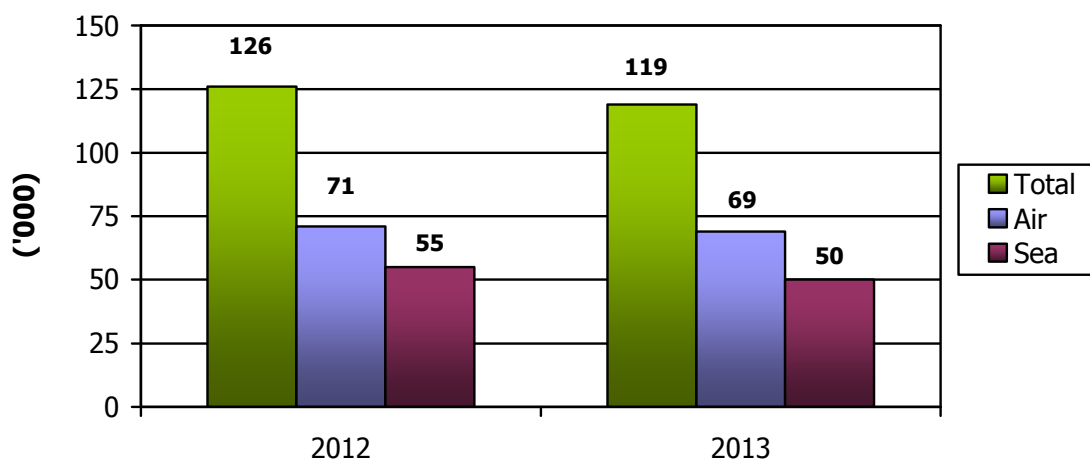
Visitor departures have **decreased overall by 3.1%** compared to the same period in 2012.

Excluding the 1,300 "returning visitors", 54% of departing passengers over the first 9 months of 2013 were visitors to Guernsey, compared to 56% over the same period in 2012.

For air passengers, 159,700 (51.3%) were departing visitors and 151,000 were departing residents.

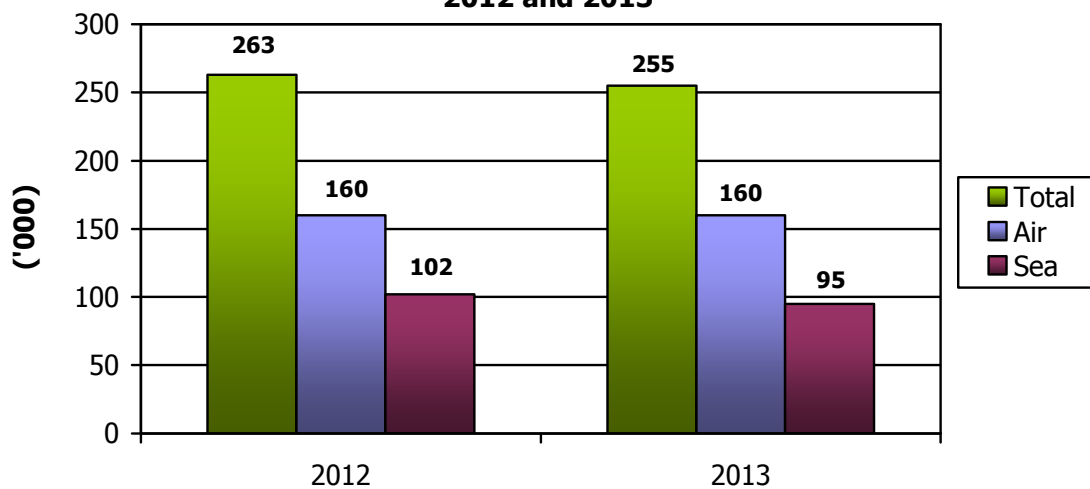
For sea passengers, 94,800 (60.3%) were departing visitors and 61,500 were departing residents.

Visitor Volumes by Travel Method Q3 2012 and 2013



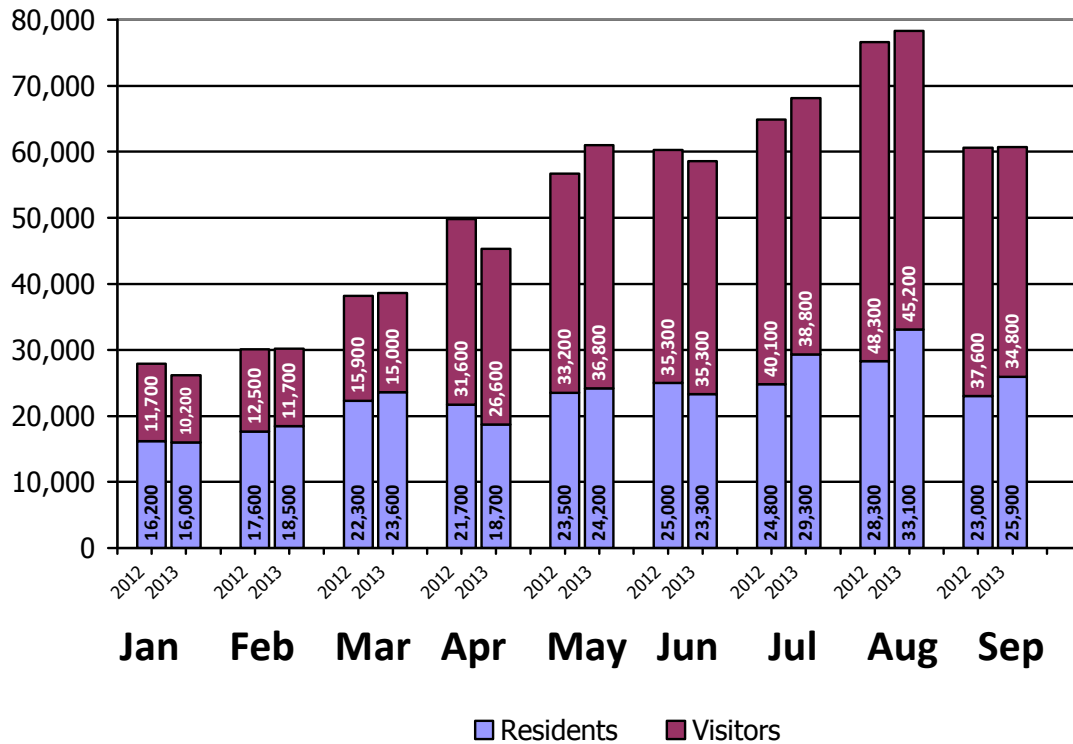
Compared to Quarter 3 2012, there has been a 2.1% decrease in visitors to Guernsey by air and a 10.3% decrease in visitors by sea.

January-September Visitor Volumes by Travel Method 2012 and 2013



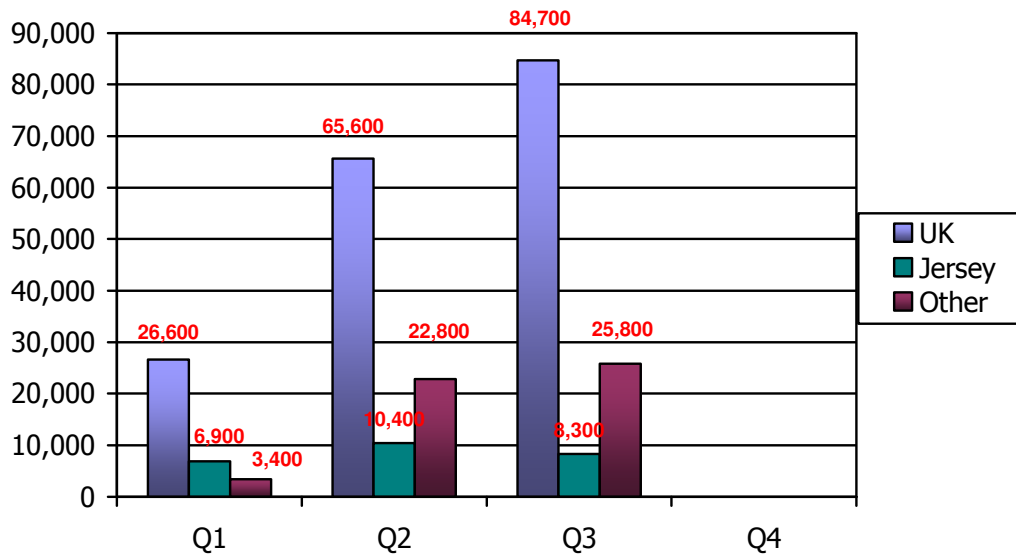
Compared to the first 9 months of 2012, there has been a 0.4% decrease in visitors to Guernsey by air and a 7.3% decrease in visitors by sea.

Visitor and Resident Departures by Month 2012 and 2013

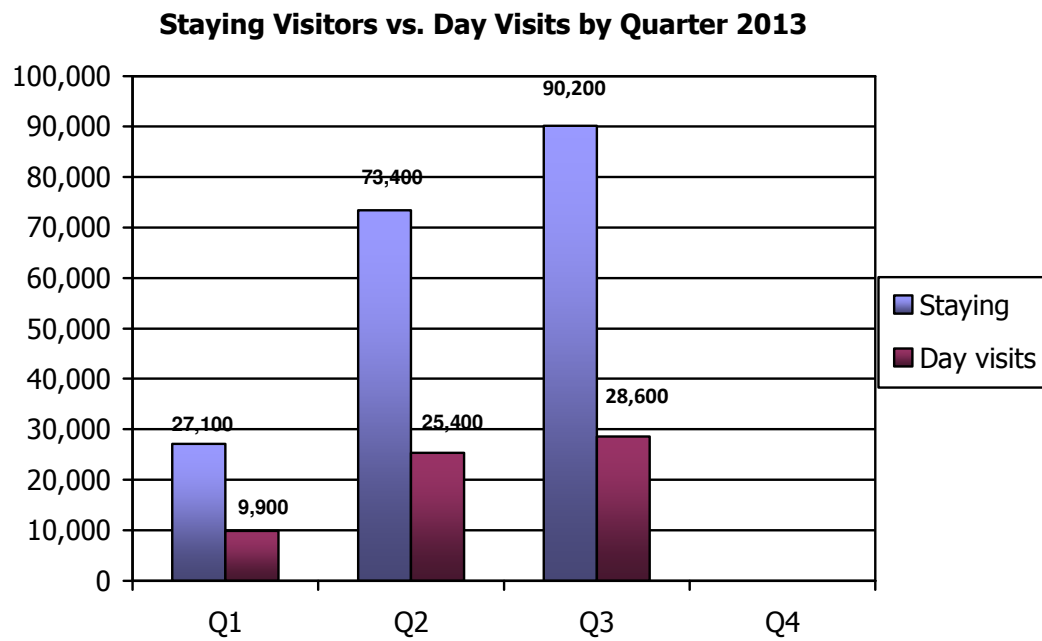


Visitor departures decreased by 12.6% in January, by 6.1% in February, by 5.6% in March and by 5.5% in April. Visitor departures increased by 11.1% in May and by 0.3% in June, before falling again by 3.3% in July, by 6.4% in August and by 7.5% in September.

Visitor Country of Residence by Quarter 2013



71.3% of visitors to Guernsey in Quarter 3 2013 were resident in the UK, with 7.0% coming from Jersey and the remaining 21.7% coming from other countries.

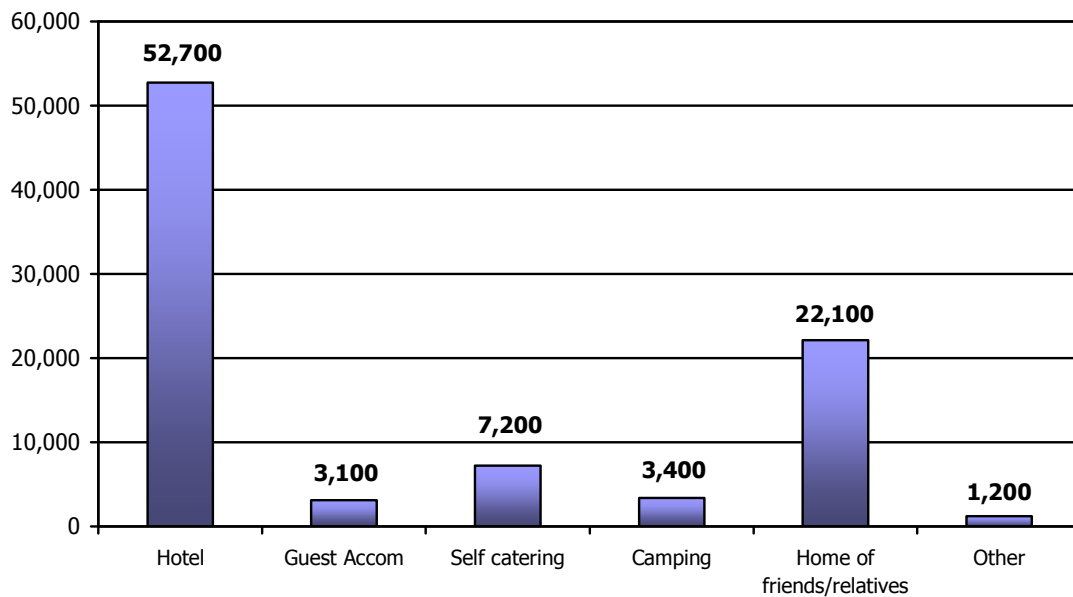


Compared to Quarter 3 2012, there has been a 4.0% decrease in visitors staying in Guernsey for at least 1 night, and a 10.7% decrease in day visits to Guernsey.

Cumulatively to the end of September, staying visitors have fallen by 2.9% compared to 2012, and day visits have decreased by 3.7%.

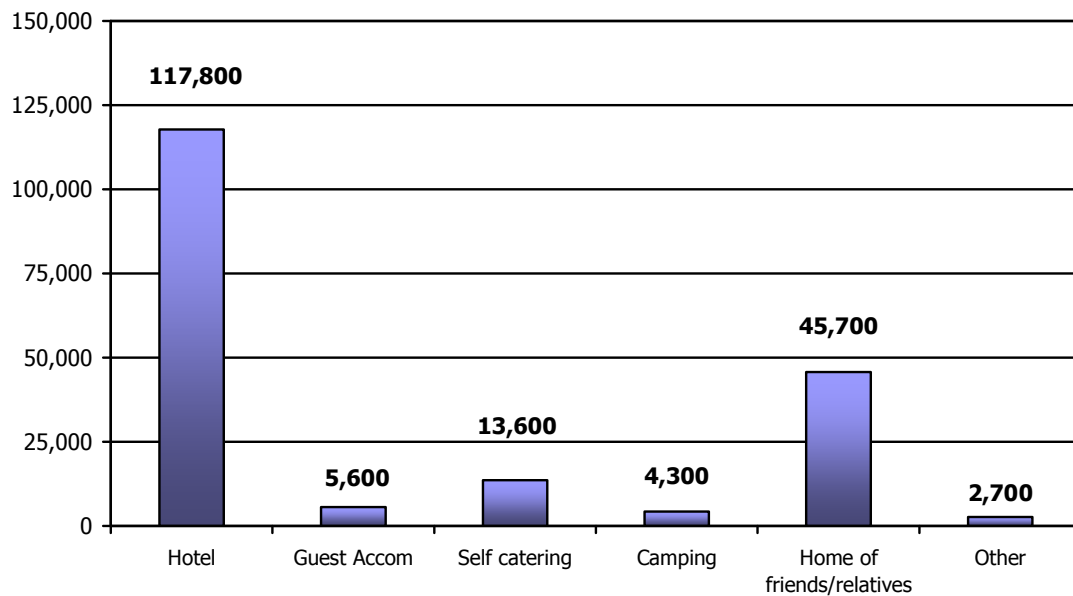
Accommodation used by Staying Visitors in Quarter 3 2013

Volume of Visitors by Accommodation Type Q3 2013



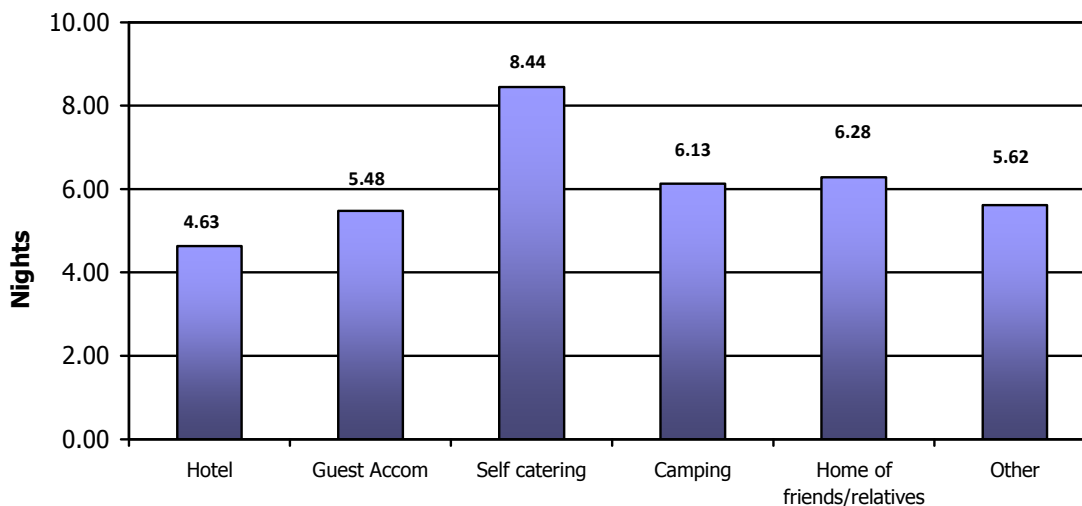
N.b. The above excludes long stay visitors (e.g. workers)

Volume of Visitors by Accommodation Type Jan - Sep 2013



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

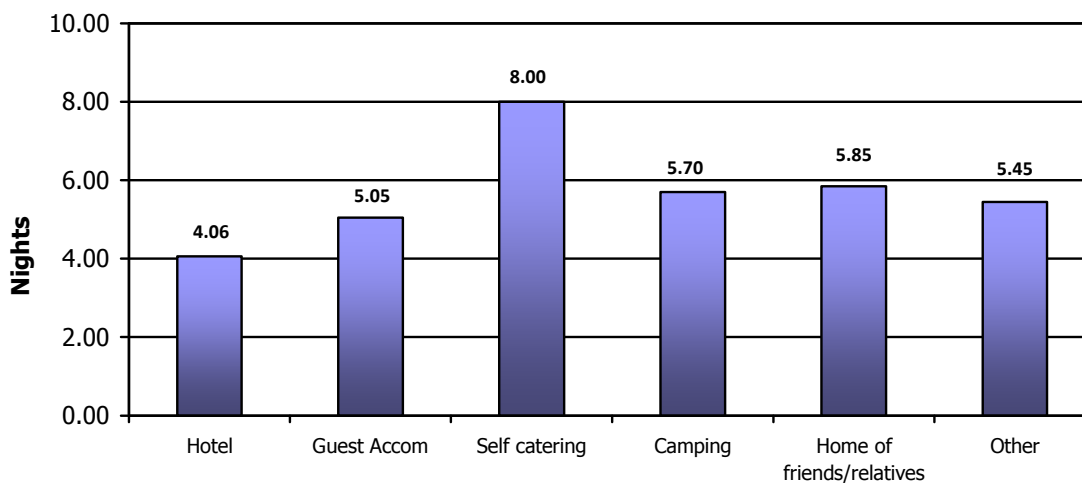
Average Length of Stay by Accommodation Type Q3 2013



In total, there were **488,000** overnight stays in Guernsey in Quarter 3 2013, with **342,500** bed nights sold in commercial accommodation. The full breakdown was as follows:

| | |
|---------------------------------|---------|
| Hotel bed nights: | 243,800 |
| Guest accommodation: | 16,900 |
| Self catering: | 60,900 |
| Camping: | 20,900 |
| Staying with friends/relatives: | 138,900 |
| Other | 6,700 |

Average Length of Stay by Accommodation Type Jan-Sep 2013



Over the first 9 months of 2013, there were **921,200** overnight stays in Guernsey, with **639,100** bed nights sold in commercial accommodation. The full breakdown was as follows:

| | |
|---------------------------------|---------|
| Hotel bed nights: | 478,000 |
| Guest accommodation: | 28,300 |
| Self catering: | 108,400 |
| Camping: | 24,400 |
| Staying with friends/relatives: | 267,200 |
| Other | 14,800 |

Appendices

Background and Aims

Guernsey has a detailed breakdown of passenger arrivals at the Airport and Harbours, but this data includes resident and visitor movements and does not break down visitors into any further detail. The only way to accurately measure total tourism volume is by undertaking a comprehensive exit survey in order to break down (or calibrate) passenger departure figures from the Airport and Guernsey's Harbours. This detailed information helps the Commerce & Employment Department, Guernsey Tourism, its marketing partners and other interested parties in allocating resources, planning and refining product development and marketing strategies, and acts as a benchmark to review future progress against marketing and strategic objectives.

Prior to 2010, the passenger exit survey was undertaken by a UK-based research company, which may have used a differing methodology and differing definitions to collate and calibrate the research data against passenger departures information. The 2010 fieldwork was undertaken by First Research, and the analysis (calibration) of the research data was undertaken by Island Ark. From February 2011 to the end of February 2013, Island Ark conducted both the ongoing fieldwork and the analysis. In March 2013, Guernsey's Commerce and Employment Department took on the responsibility for the fieldwork, while Island Ark has continued to provide advice on methodology and sampling, as well as the analysis.

One major difference in approach from previous surveys was that from 2010 the survey also covered departing passengers on the air and sea routes to Alderney, Sark and Herm. Passengers on these routes had not been previously included in visitor or resident movements. Therefore, for more direct comparisons with previous years' data, the passengers on these routes have been excluded from this quarterly analysis. It was also evident that the definition of holidaymakers and those visiting friends and relatives has differed between previous surveys (See 2013 definitions in the appendices).

The broad objectives of the 2013 Exit Survey are as follows:

- Determine the passenger composition of each of Guernsey's main air and sea transport routes across the whole of 2013
- Consolidate this information in order to calculate visitor volumes broken down into different visitor segments
- Provide information on visitor purpose of visit, country and UK region of residence
- Provide information on resident purpose of visit away from Guernsey
- Provide basic profiling information for residents and visitors (length of stay, party size, accommodation stayed in, first-time or repeat visitor)

As well as a full-year report, the passenger numbers need to be broken down by month, and a more detailed quarterly report is also produced. This is the third 2013 quarterly report on passenger departures between January and September (Q1, Q2 and Q3 2013).

Methodology

As with previous exit surveys, face-to-face interviews are being conducted with departing passengers throughout 2013, 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 has been discontinued in 2013.

The questionnaire is asked to one respondent within each travelling party, who responds on behalf of that party.

Interviewers with French and German language skills are allocated as far as possible to appropriate shifts where language skills are helpful.

Interview shifts

The questionnaire is relatively short, with the aim of maximising the coverage for this survey so that adequate sample sizes are achieved on each of Guernsey's main transport routes in order to break down the passenger numbers on those routes.

Between July and September 2013, **349 interviewer hours** were allocated to this Passenger Calibration Survey. The exact shift schedules were flexible in order to account for 2013 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 Herm, Sark and Alderney routes, Q1, Q2 and Q3 data therefore comes from **25,948 interviews, representing 49,919 departing passengers (10.7% of Guernsey's total non-Bailiwick departing passengers over Q1, Q2 and Q3 2013)** 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 nearly 50,000 passengers provides a strong degree of statistical confidence in the results for the first 9 months of 2013. 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.

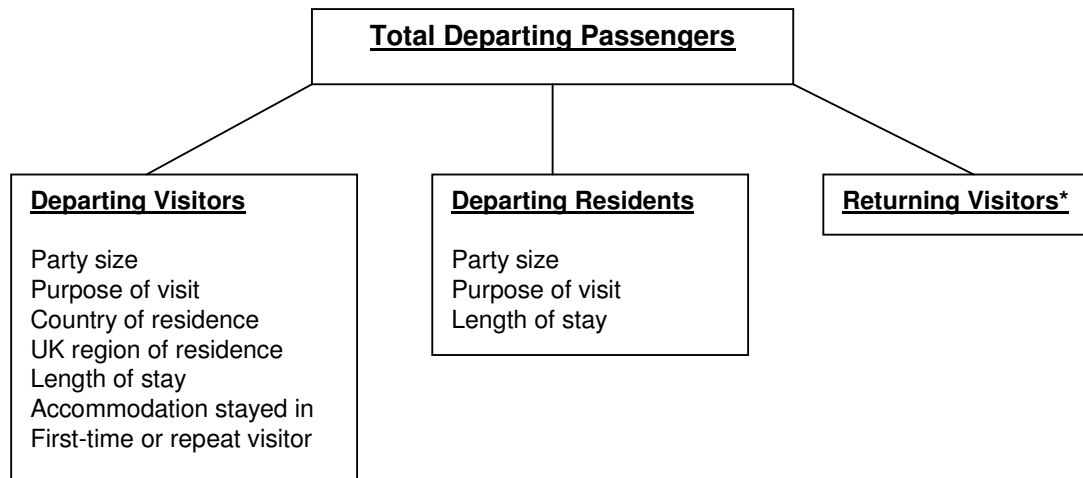
The detailed interview shifts were planned in advance, but there was flexibility in the schedules as detailed above. Interview shifts were planned to take account of the following:

- Passenger throughput by month.
- Passenger throughput at the various sampling points (Airport, Harbour Passenger and Car Terminals, Sark and Herm ferries).
- 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).

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 2013, 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.

2013 Passenger Departures Including Alderney, Sark and Herm Departures

Cumulative Passenger Departures by Route January – September 2013 (including Alderney, Sark and Herm):

| | <u>Volume</u> | <u>% of total pax.</u> | <u>2013 vs. 2012</u> |
|--------------------------|----------------------|-------------------------------|-----------------------------|
| London Gatwick | 131,700 | 22.1% | 0.4% |
| Southampton | 50,600 | 8.5% | 0.7% |
| Manchester | 25,300 | 4.2% | 4.6% |
| Birmingham | 8,600 | 1.4% | -15.4% |
| East Midlands | 11,800 | 2.0% | 2.8% |
| Bristol | 9,900 | 1.7% | -3.7% |
| Exeter | 8,500 | 1.4% | -1.7% |
| Stansted | 7,300 | 1.2% | -17.6% |
| Other UK Air | 1,400 | 0.2% | 20.8% |
| Total UK Air | 255,100 | 42.7% | -0.4% |
| Jersey | 51,500 | 8.6% | -4.8% |
| Alderney | 14,500 | 2.4% | -6.1% |
| Total CI Air | 66,000 | 11.0% | -5.1% |
| Dinard | 1,700 | 0.3% | -14.2% |
| Swiss Air | 100 | * | -15.7% |
| Other Foreign Air | 2,800 | 0.5% | -15.3% |
| Total Foreign Air | 4,600 | 0.8% | -14.9% |
| Total Air: | 325,700 | 54.5% | -1.6% |
| UK Sea | 71,100 | 11.9% | 10.3% |
| Jersey | 45,600 | 7.6% | 3.2% |
| Herm | 69,600 | 11.7% | 13.1% |
| Sark | 44,600 | 7.5% | 2.7% |
| St. Malo | 33,000 | 5.5% | -3.6% |
| Other French Sea | 7,500 | 1.3% | -4.4% |
| Alderney | 200 | * | |
| Total Sea: | 271,600 | 45.5% | 6.2% |
| Total Departures: | 597,300 | | 1.8% |

2013 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".

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 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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