

2013 Travel Survey

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

RESEARCH REPORT

14th February 2014

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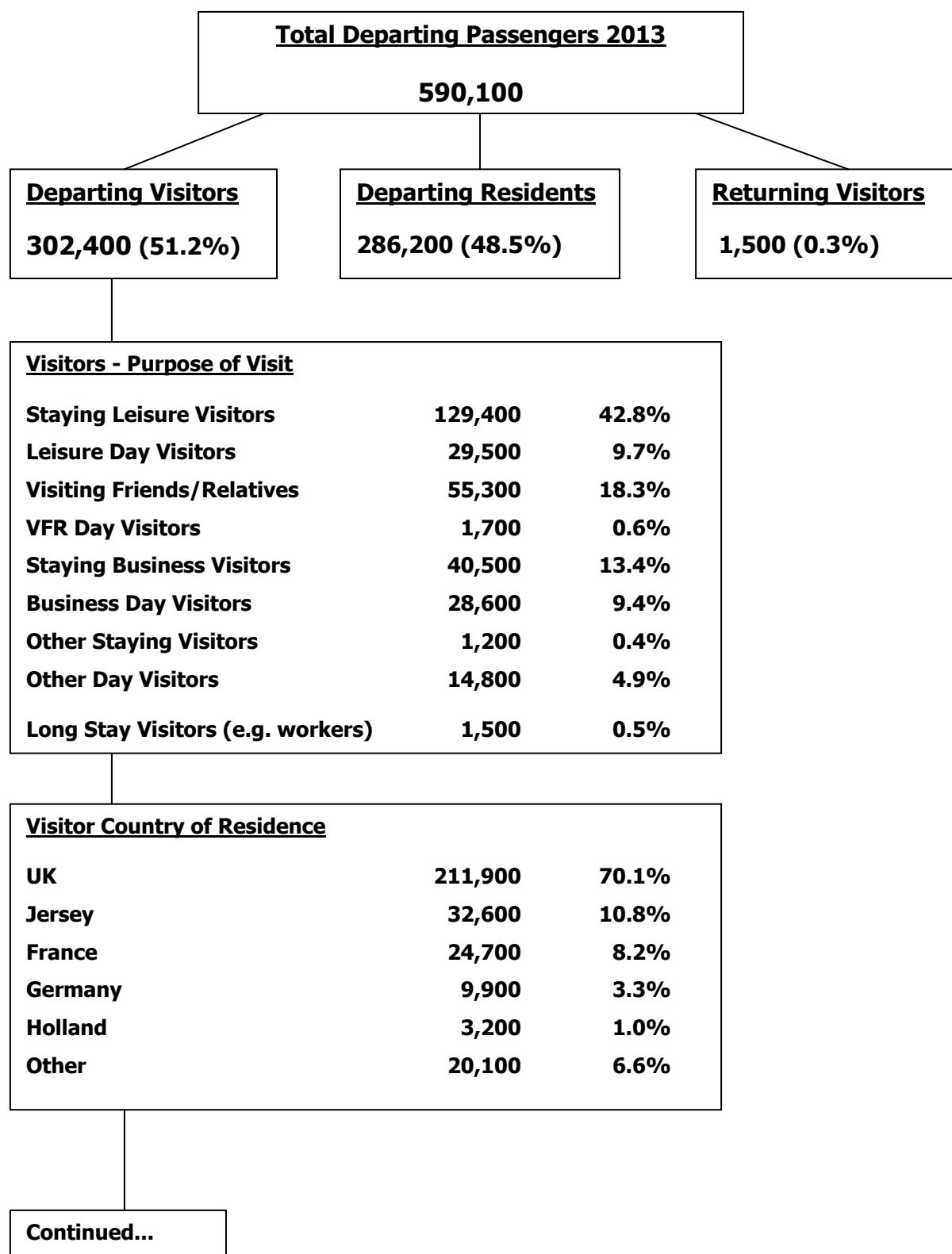
Summary of Results

	<u>2012</u>	<u>2013</u>	<u>% change</u>
Total departing passengers	587,400	590,100	+0.5%
Total departing visitors	317,900	302,400	-4.9%
Departing visitors by air	201,800	198,100	-1.9%
Departing visitors by sea	116,100	104,300	-10.1%
Staying leisure visitors	138,500	129,400	-6.6%
Visiting friends and relatives	49,000	57,000	+16.3%
Staying business / conference	47,200	40,500	-14.3%
Leisure day visits	32,400	29,500	-9.0%
Business day visits	29,200	28,600	-2.1%
Total staying visitors	238,400	227,800	-4.4%
Average length of stay	4.67 nights	4.75 nights	+1.7%
Total overnight stays (bed nights)	1,103,900	1,074,500	-2.7%
Total staying in commercial accommodation	179,700	166,300	-7.5%
Average stay in commercial accommodation	4.34 nights	4.40 nights	+1.4%
Bed nights in commercial accommodation	780,600	731,800	-6.2%
Day visits	79,400	74,600	-6.1%
UK visitors	214,600	211,900	-1.3%
Jersey visitors	39,700	32,600	-17.8%
French visitors	25,800	24,700	-4.3%
German visitors	13,100	9,900	-24.8%
Dutch visitors	3,200	3,200	+0.6%
Other nationalities	21,500	20,100	-6.4%
Departing Guernsey residents	267,900	286,200	+6.8%
Departing residents by air	209,500	212,100	+1.3%
Departing residents by sea	58,400	74,100	+26.8%

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

Breakdown of Departing Visitors

Excluding the Alderney, Sark and Herm routes, the total 2013 passenger numbers were broken down as follows:

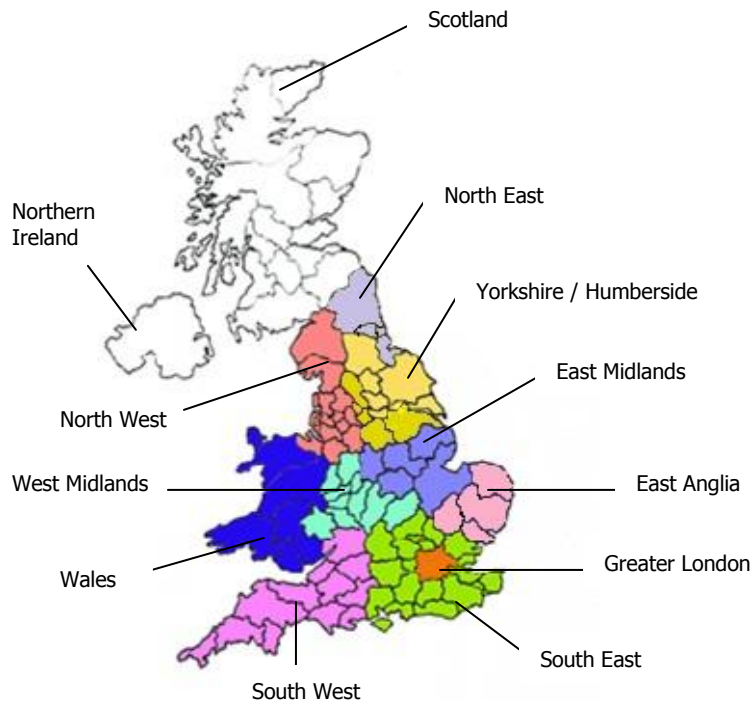


UK Visitors - Region of Residence

South East	57,300	27.1%
Greater London	35,300	16.7%
South West	35,100	16.6%
North West	16,600	7.8%
East Midlands	15,400	7.3%
West Midlands	13,600	6.4%
Yorkshire / Humberside	11,800	5.6%
East Anglia	10,000	4.7%
Wales	5,900	2.8%
Scotland	5,200	2.4%
North East	3,100	1.5%
N. Ireland	1,900	0.9%
Isle of Man	600	0.3%

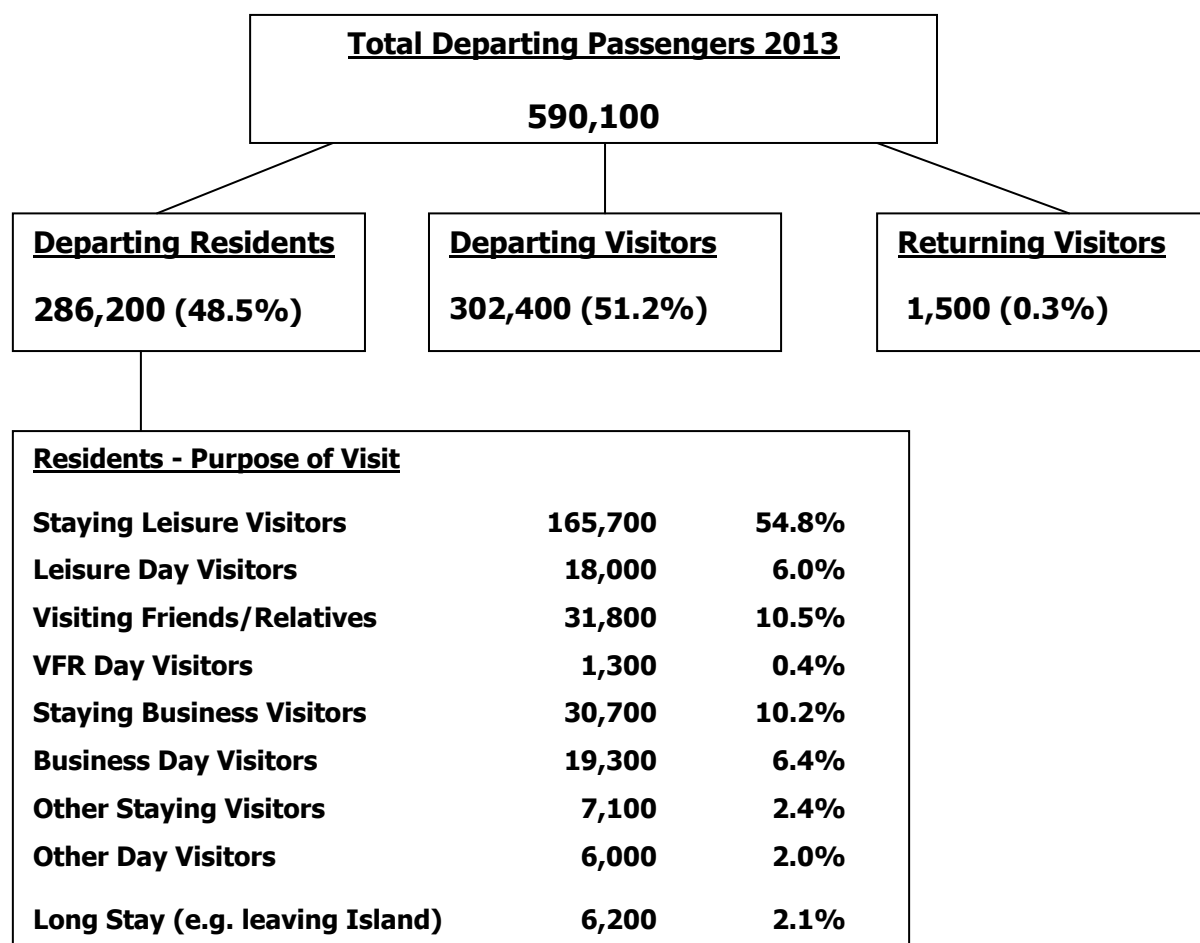
(The above UK Regions exclude Jersey, which is considered a separate 'Country of Residence')

Region Definitions



Breakdown of Departing Residents

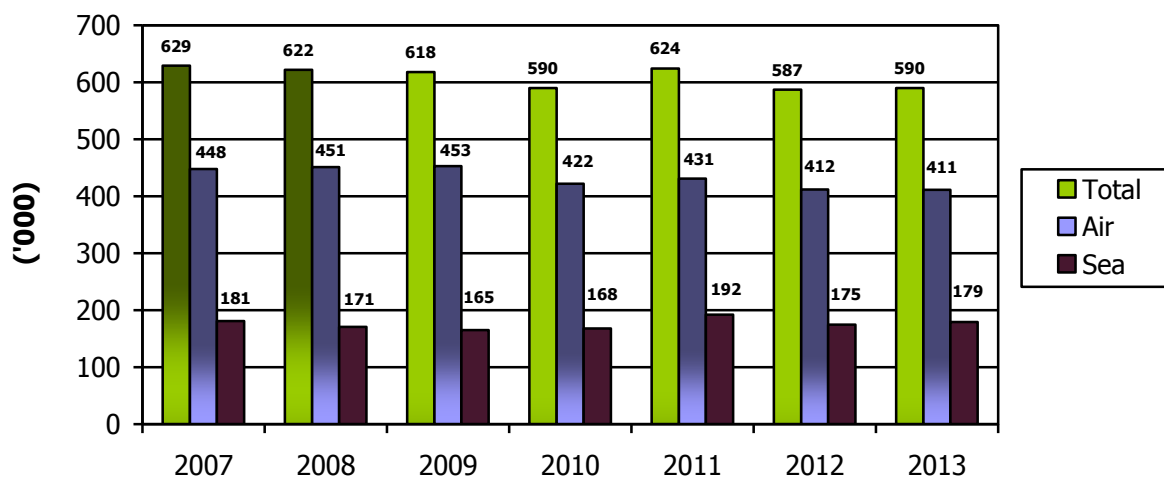
Excluding the Alderney, Sark and Herm routes, the total 2013 passenger numbers were broken down as follows:



Comparisons with previous years

Please note that methodologies, definitions and sample sizes achieved on different routes may have changed between the 2013 survey and previous surveys.

Passenger Departures 2007 - 2013



N.b. For direct comparison, the above figures exclude air and sea departures to Herm, Sark and Alderney.

Passenger Departures by Route in 2013 (including Alderney, Sark and Herm):

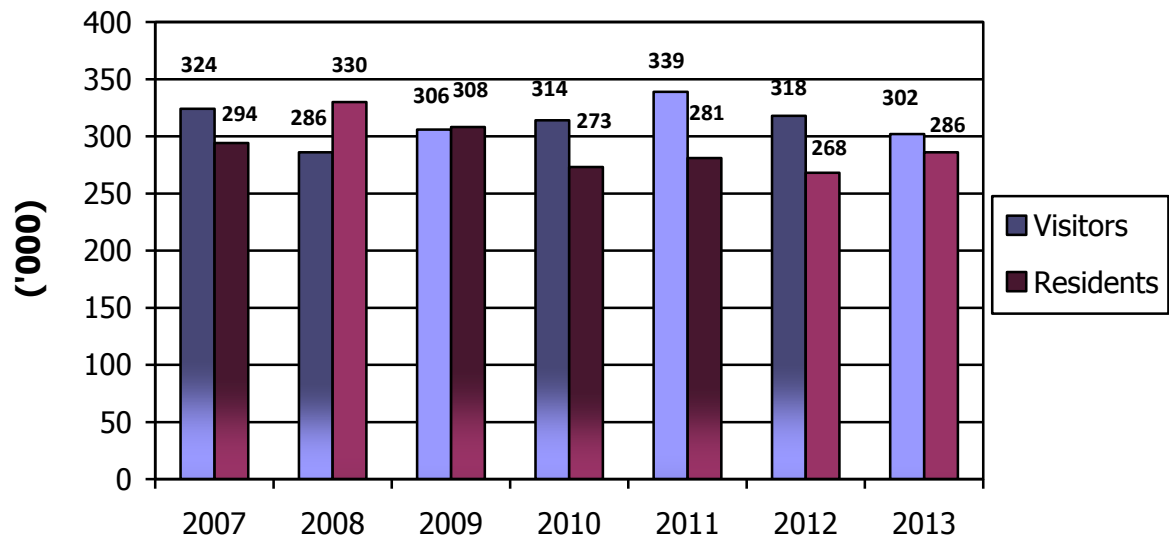
Air Routes

	<u>Volume</u>	<u>% of total pax.</u>	
London Gatwick	173,200	23.7%	
Southampton	68,100	9.3%	
Manchester	33,300	4.5%	
East Midlands	14,700	2.0%	
Bristol	12,800	1.7%	
Exeter	11,100	1.5%	
Birmingham	11,000	1.5%	
Stansted	9,500	1.3%	
Other UK Air	1,500	0.2%	Total UK Air: <u>335,200</u> <u>45.8%</u>
Jersey	70,300	9.6%	
Alderney	18,500	2.5%	
Other	100	*	Total CI Air: <u>89,000</u> <u>12.2%</u>
Dinard	2,200	0.3%	
Swiss Air	100	*	
Other Foreign Air	3,100	0.4%	Total Foreign Air: <u>5,400</u> <u>0.7%</u>
Total Air:	429,600	58.7%	

Sea Routes

UK Sea	83,200	11.4%
Herm	75,400	10.3%
Jersey	51,800	7.1%
Sark	47,800	6.5%
St. Malo	36,700	5.0%
Other French Sea	7,500	1.0%
Alderney	200	*
Total Sea:	302,700	41.3%

Visitors vs. Residents 2007 - 2013

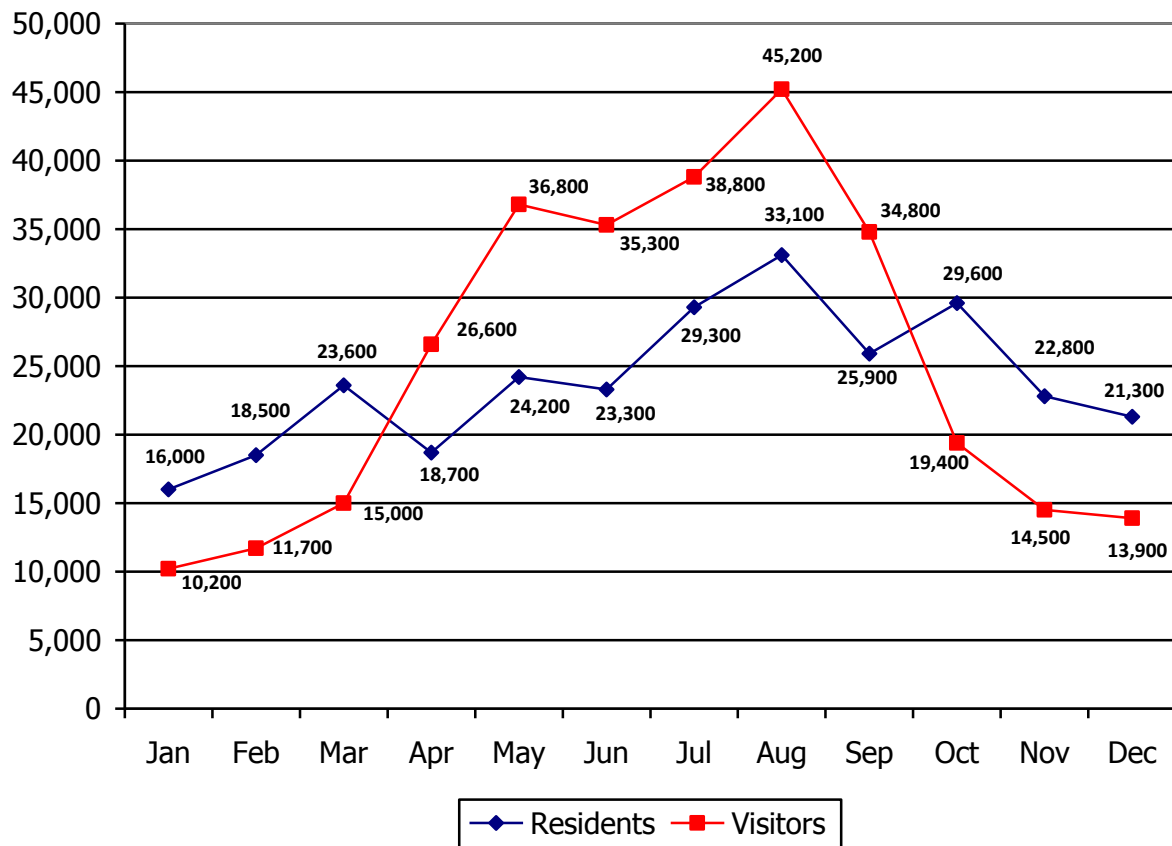


Excluding "returning visitors", 51.4% of departing passengers in 2013 were visitors to Guernsey, compared to 54.3% in 2012.

For air passengers, 198,100 (48.2%) were departing visitors and 212,200 were departing residents.

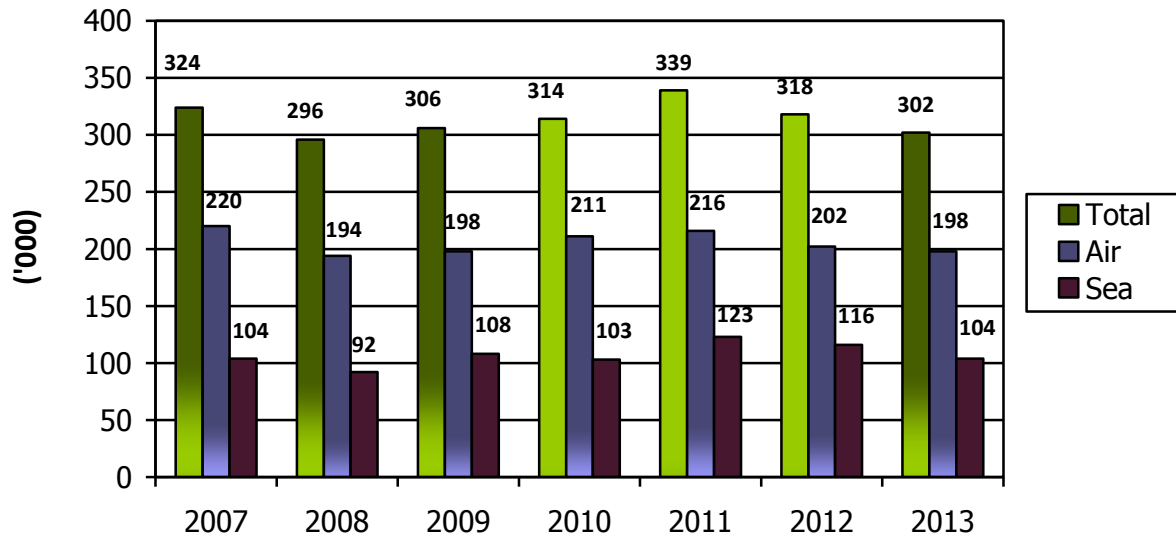
For sea passengers, 104,300 (58.2%) were departing visitors and 74,100 were departing residents.

Visitor and Resident Departures by Month 2013



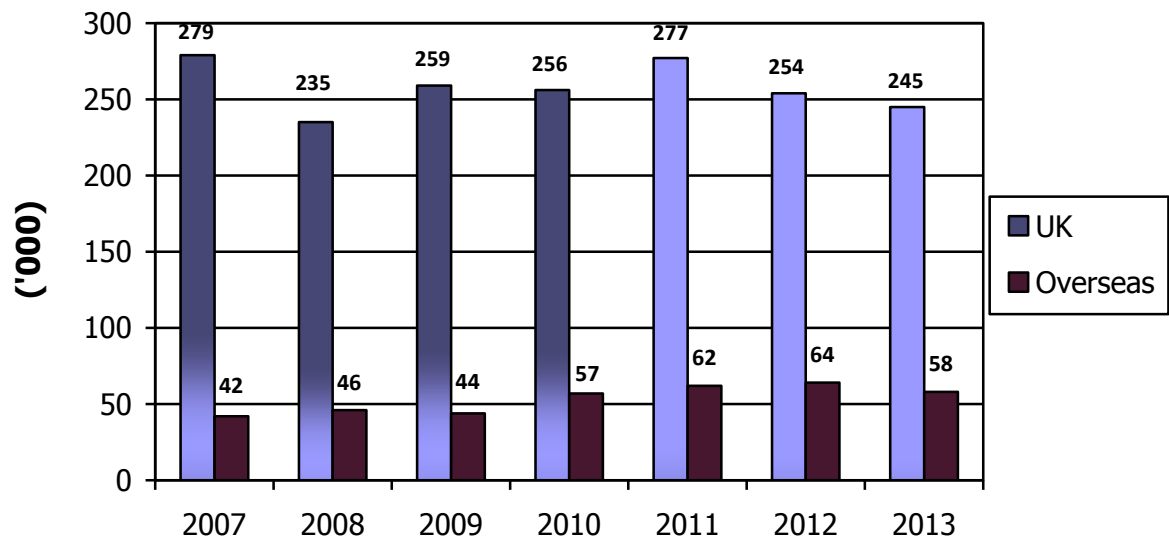
Compared to 2012, visitor departures decreased by 12.6% in January, by 6.1% in February, by 5.6% in March and by 5.5% in April. Visitor departures increased by 11.1% in May and by 0.3% in June, before falling again by 3.3% in July, by 6.4% in August, by 7.5% in September, by 14.8% in October, by 12.6% in November and by 12.0% in December.

Visitor Volumes 2007 - 2013



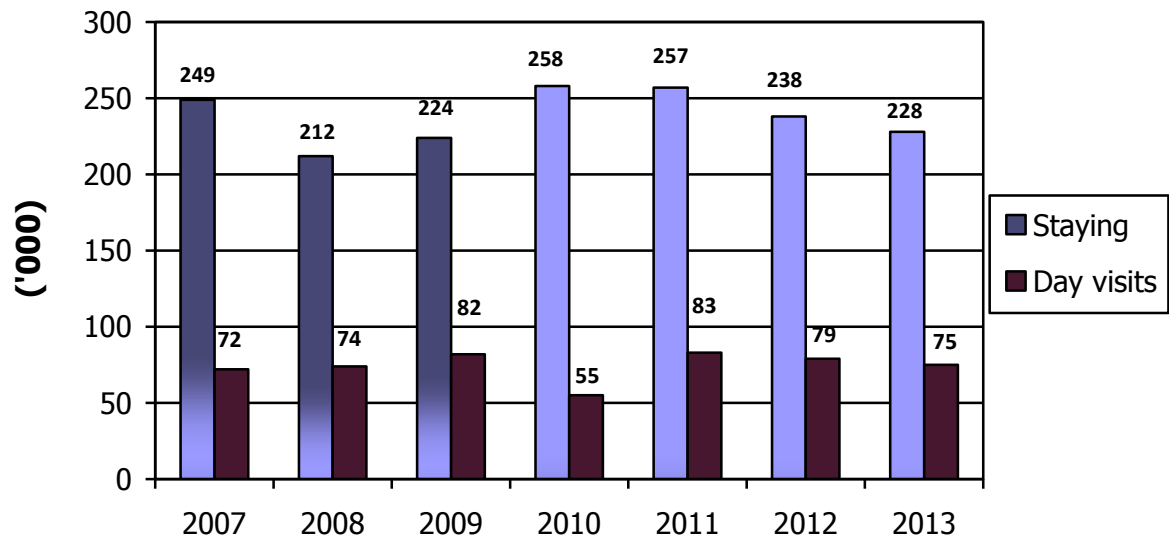
Compared to 2012, there has been a 4.9% decrease in visitors to Guernsey, with a 1.9% decrease in visitors by air and a 10.1% decrease in visitors by sea.

Visitor Country of Residence 2007 - 2013



N.b. UK figures include Jersey

Staying Visitors vs. Day Visits 2007 - 2013



Compared to 2012, there has been a 4.4% decrease in visitors staying in Guernsey for at least 1 night, and a 6.1% decrease in day visits to Guernsey.

Additional Visitor Profiling Information

Staying Leisure Visitors:

There were 129,400 staying leisure visitors to Guernsey in 2013, representing a decrease of 6.6% compared to 2012.

Country of residence:

UK	92,700	71.6%
France	11,900	9.2%
Jersey	7,400	5.7%
Germany	6,500	5.0%
Netherlands	1,900	1.5%
Other	9,100	7.0%

The average length of stay for staying leisure visitors in 2013 was **4.96 nights**.

The average party size for staying leisure visitors in 2013 was **2.38 persons**.

The percentage of first time staying leisure visitors to Guernsey in 2013 was **46.7%**.

77,500 (59.9%) of staying leisure visitors travelled to Guernsey by air, with **68,400** (88.2%) of these travelling on the UK air routes. **51,900** travelled by sea.

Travel routes for staying leisure visitors:

UK Air	68,400	52.8%
Jersey Air	7,000	5.4%
Foreign Air	2,200	1.7%
UK Sea	27,500	21.2%
Jersey Sea	12,700	9.8%
St. Malo	10,600	8.2%
Other French Sea	1,100	0.8%
Total	129,400	

Accommodation stayed in for staying leisure visitors:

Hotel	96,700	74.8%
Guest Accommodation	4,900	3.8%
Self Catering	12,100	9.4%
With friends / relatives	9,600	7.4%
Camping	3,900	3.0%
Other	2,200	1.7%
Total	129,400	

Leisure Day Visits:

There were 29,500 leisure day visitors to Guernsey in 2013, representing a decrease of 9.0% compared to 2012.

Country of residence:

UK	13,100	44.6%
France	8,600	29.1%
Jersey	4,000	13.5%
Germany	2,900	9.9%
Other	900	2.9%

The average party size for day visits in 2013 was **3.34 persons**.

The percentage of first time day visitors to Guernsey in 2013 was **64.0%**.

2,400 (8.2%) of leisure day visitors travelled to Guernsey by air with **27,000** travelling by sea.

Travel routes for leisure day visitors:

UK Air	700	2.5%
Jersey Air	1,700	5.7%
UK Sea	8,400	28.4%
Jersey Sea	10,600	36.0%
St. Malo	2,800	9.4%
Other French Sea	5,300	18.0%
Total	29,500	

N.b. Transit visitors have been classified as "Other Day" visits since 2012. Prior to 2012, they were included within the figures for "Leisure Day".

Visiting Friends and Relatives (VFR):

55,300 had their main purpose of visit to visit friends or relatives in Guernsey and were also staying for at least a night. A further **1,700** were on a day visit to see friends or family. The VFR market has increased by 16.3% compared to 2012.

Country of residence for Staying VFR:

UK	46,200	83.6%
Jersey	1,700	3.2%
France	1,500	2.6%
Other	5,900	10.6%

The average length of stay (excluding day visits) in 2013 was **5.54 nights**.

The average party size for staying VFR visitors in 2013 was **1.81 persons**.

The percentage of first time staying VFR visitors to Guernsey in 2013 was **10.4%**.

46,600 (81.7%) of VFR visitors travelled to Guernsey by air, with **10,400** travelling by sea.

Travel routes for VFR visitors (day and stay):

UK Air	44,400	78.0%
Jersey Air	1,700	3.1%
Foreign Air	400	0.7%
UK Sea	7,200	12.7%
Jersey Sea	1,400	2.4%
St. Malo	1,400	2.5%
Other French Sea	400	0.7%
Total	57,000	

Accommodation stayed in for VFR visitors:

Hotel	8,800	15.8%
Guest Accommodation	400	0.7%
Self Catering	1,600	3.0%
Camping	200	0.4%
Other	100	0.2%
With friends/relatives	44,200	80.0%
Total	55,300	

Staying Business/Conference Visitors:

There were 40,500 staying business/conference visitors to Guernsey in 2013, representing a decrease of 14.3% compared to 2012.

Country of residence:

UK	30,600	75.8%
Jersey	5,400	13.3%
France	800	2.1%
Netherlands	600	1.4%
Switzerland	400	1.0%
Ireland	400	0.9%
Other	2,200	5.5%

The average length of stay for staying business visitors in 2013 was **2.99 nights**.

The average party size for staying business visitors in 2013 was **1.42 persons**.

The percentage of first time staying business visitors to Guernsey in 2013 was **17.3%**.

34,500 (85.2%) of staying business visitors travelled to Guernsey by air, with **6,000** travelling by sea.

Travel routes for staying business visitors:

UK Air	27,400	67.6%
Jersey Air	7,000	17.3%
Foreign Air	100	0.3%
UK Sea	3,500	8.7%
Jersey Sea	2,000	5.0%
St. Malo	400	1.1%

Total **40,500**

Accommodation stayed in for staying business visitors:

Hotel	35,300	87.2%
Guest Accommodation	900	2.3%
Self Catering	1,000	2.5%
With friends/relatives	2,400	5.9%
Other	800	2.0%

Total **40,500**

Business Day Visits:

There were 28,600 business day visitors to Guernsey in 2013, representing a decrease of 2.1% compared to 2012.

Country of residence:

UK	16,300	57.3%
Jersey	11,200	39.2%
Ireland	200	0.7%
France	200	0.6%
Other	700	2.3%

The average party size for business day visits in 2013 was **1.38 persons**.

The percentage of first time business day visitors to Guernsey in 2013 was **12.8%**.

27,100 (94.9%) of business day visitors travelled to Guernsey by air with **1,500** travelling by sea.

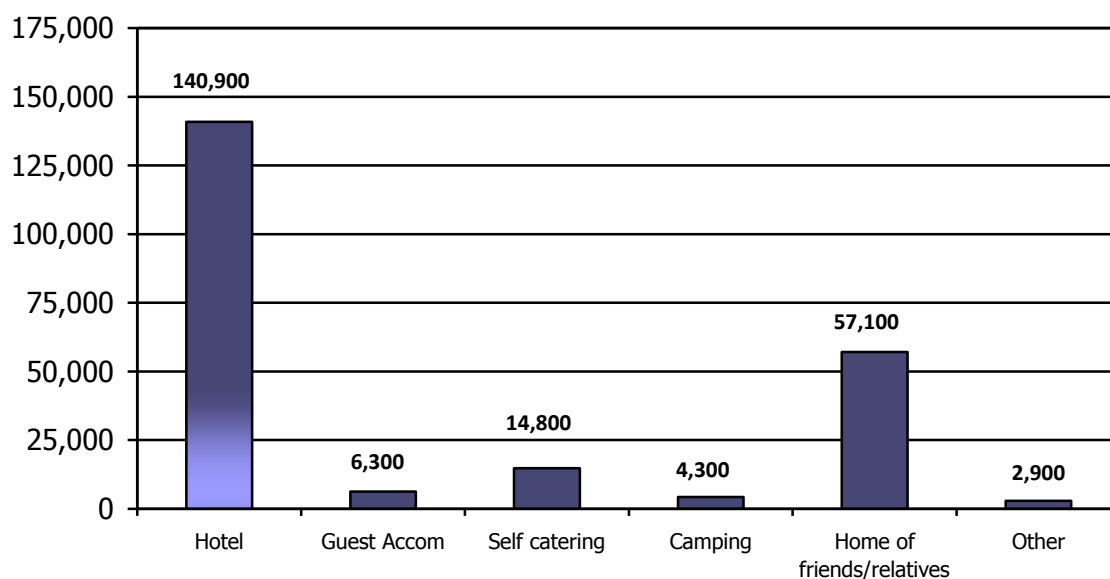
Travel routes for business day visitors:

UK Air	14,500	50.9%
Jersey Air	12,600	44.0%
UK Sea	900	3.2%
Jersey Sea	400	1.5%
French Sea	100	0.4%

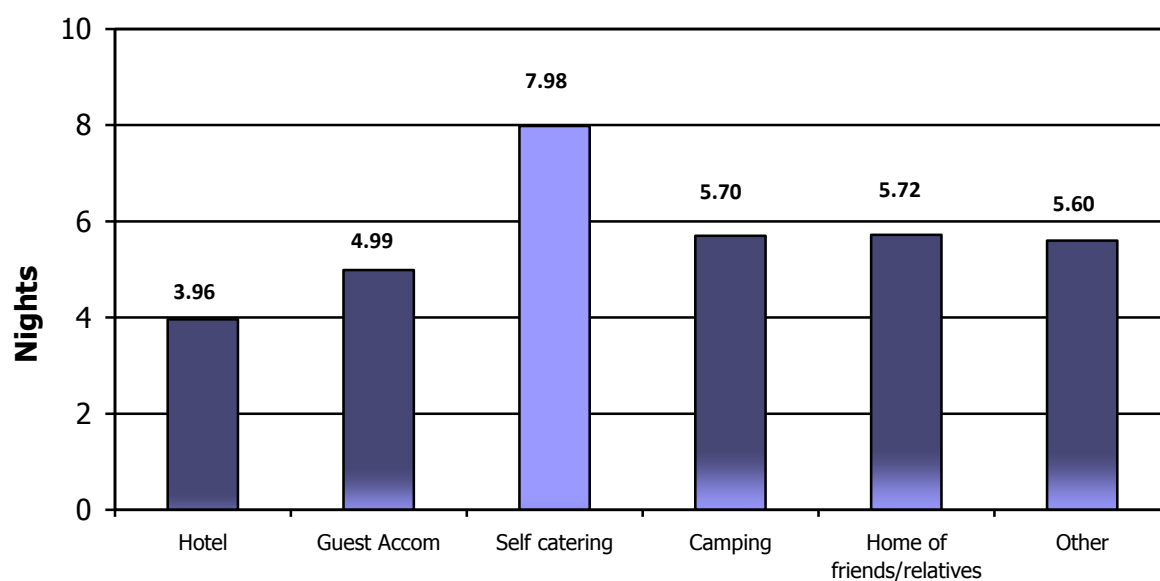
Total **28,600**

Accommodation used by Staying Visitors in 2013 (Excluding Bailiwick)

Volume of Visitors by Accommodation Type



Average Length of Stay by Accommodation Type



In total, excluding residents and visitors from within the Bailiwick, there were **1,074,500** overnight stays in Guernsey in 2013, with **731,800** bed nights sold in commercial accommodation. The full breakdown was as follows:

Hotel bed nights:	557,900
Guest accommodation:	31,400
Self catering:	118,000
Camping:	24,500
Staying with friends/relatives:	326,200
Other	16,400

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.

Methodology

As with previous exit surveys, face-to-face interviews were 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 October and December 2013, **256 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 to Q4 data therefore comes from **31,927 interviews, representing 60,279 departing passengers (10.2% of Guernsey's total non-Bailiwick departing passengers over the whole of 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 just over 60,000 passengers provides a strong degree of statistical confidence in the results for the whole 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.

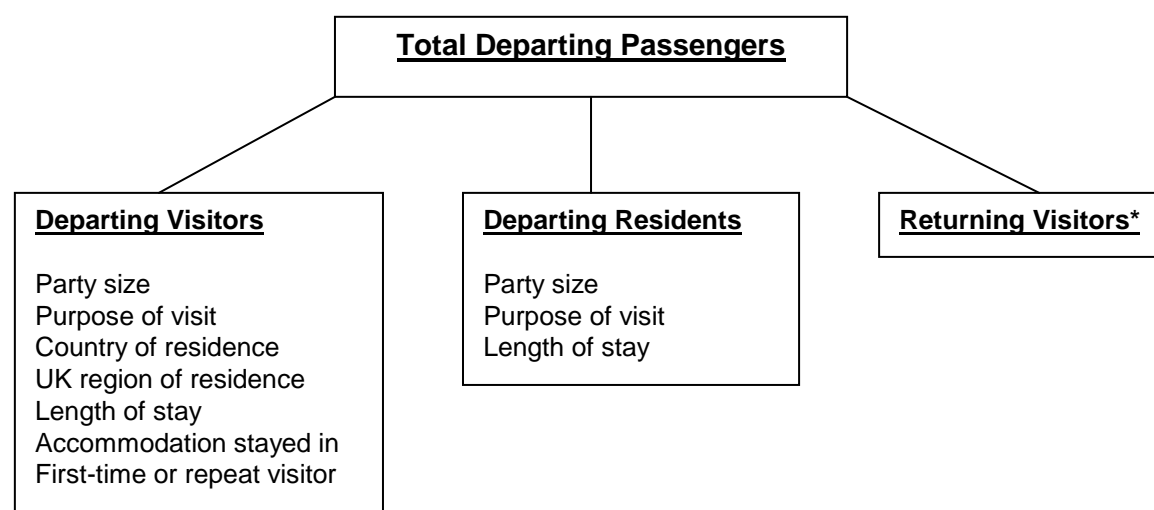
The detailed interview shifts were planned in advance, but there was flexibility in the schedules as detailed above. Interview shifts were planned to take account of the following:

- 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 is provided for each major transport route to Guernsey in 2013, and is grossed up to show total air and total sea passenger breakdowns.

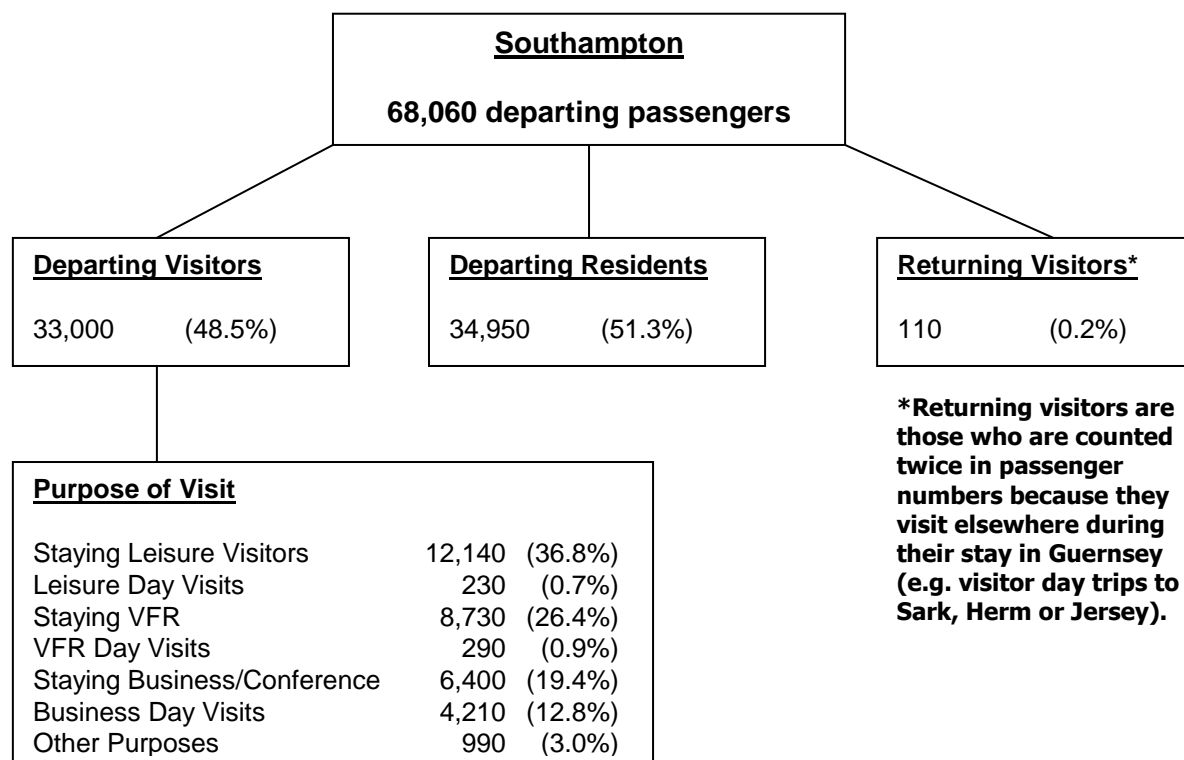
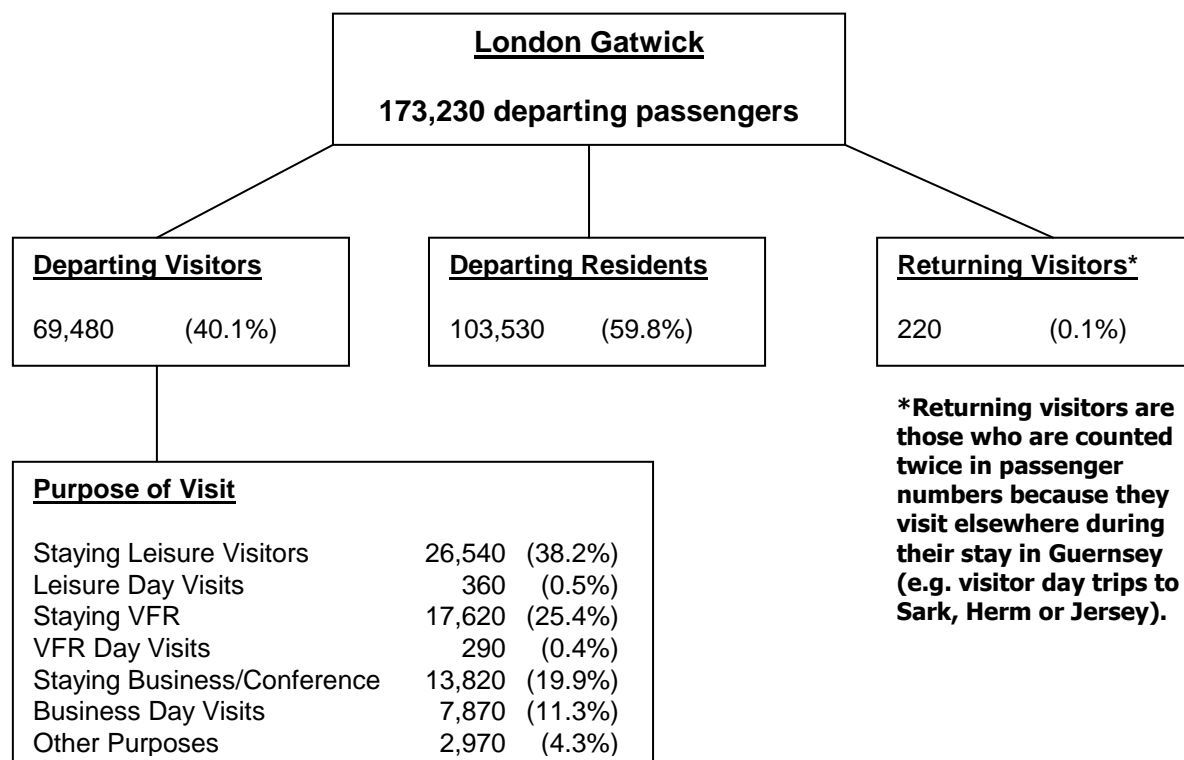
As sample sizes for some of the smaller transport routes are not large enough on a monthly or seasonal basis, the profile of passengers across the whole period of the survey is applied. Also, some of the smaller transport routes are combined into groupings.

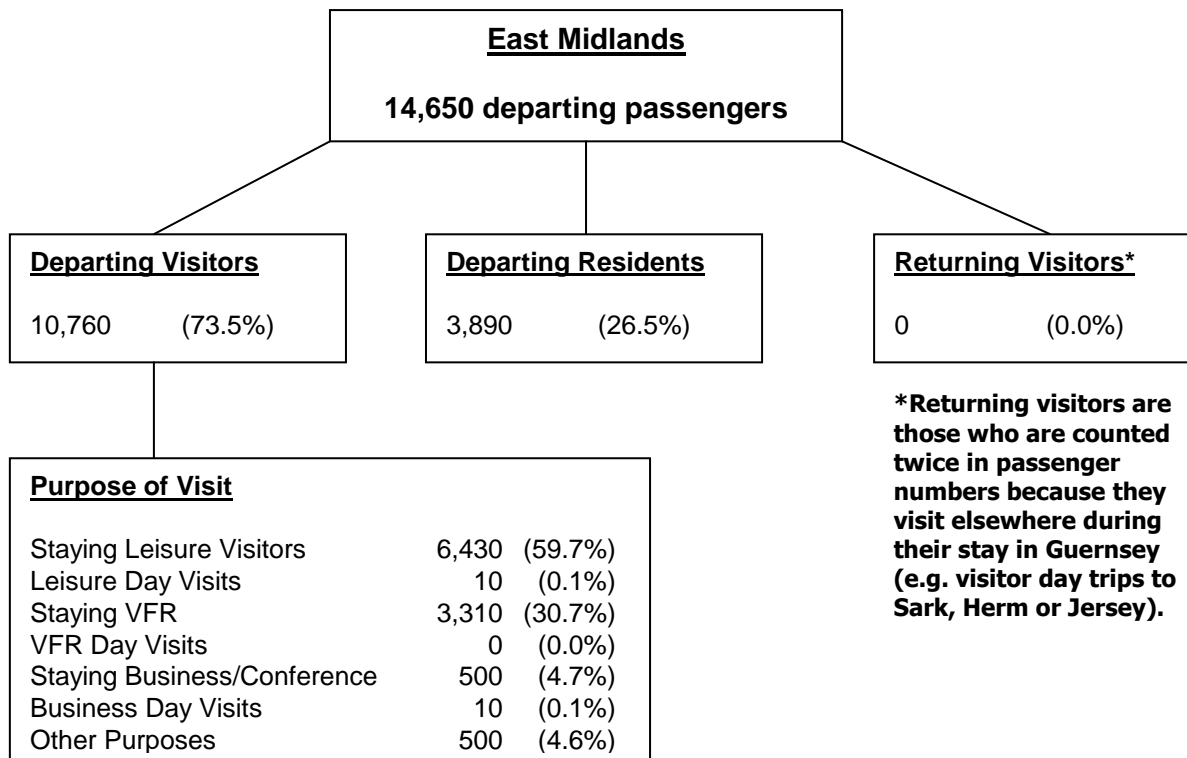
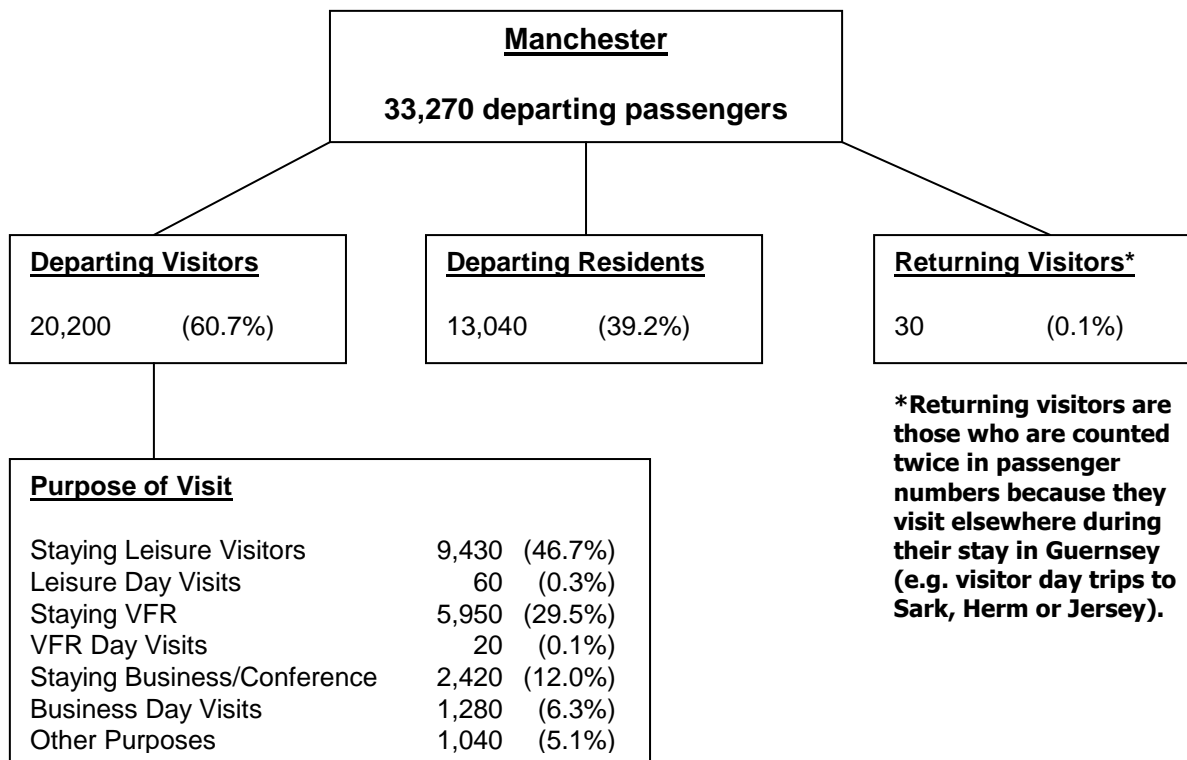
2013 Passenger Departures Including Alderney, Sark and Herm Departures

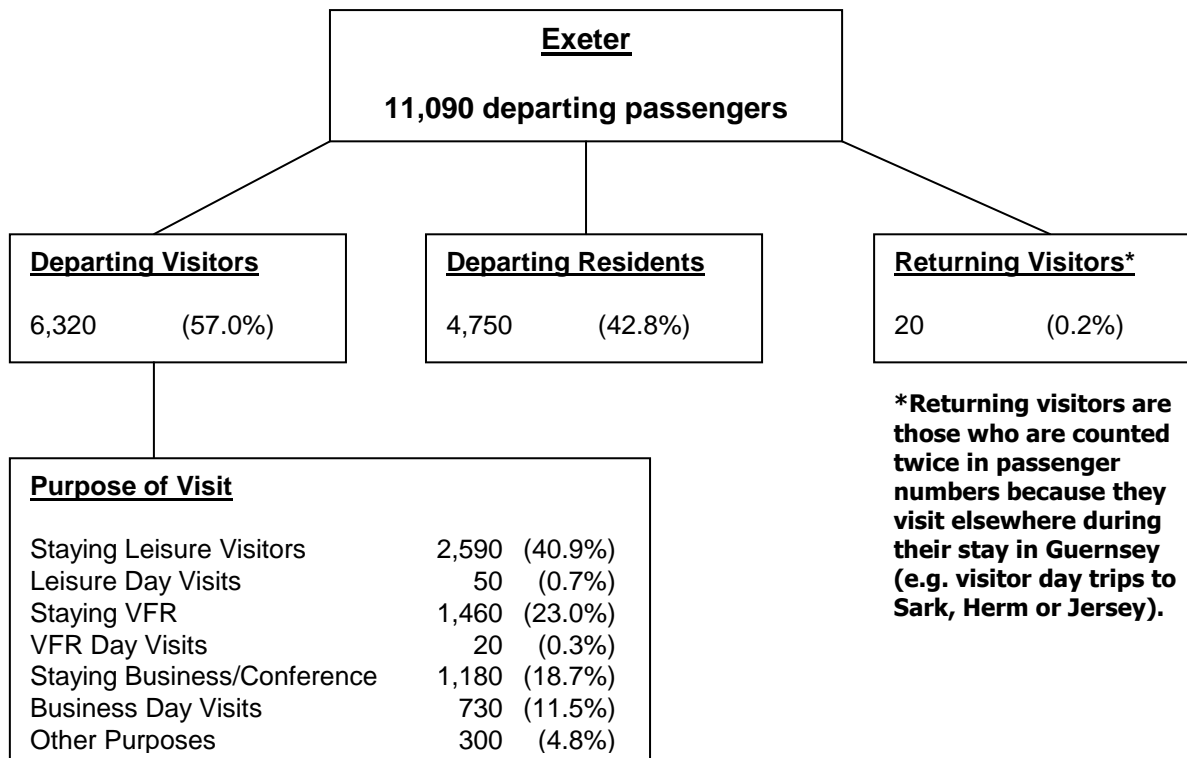
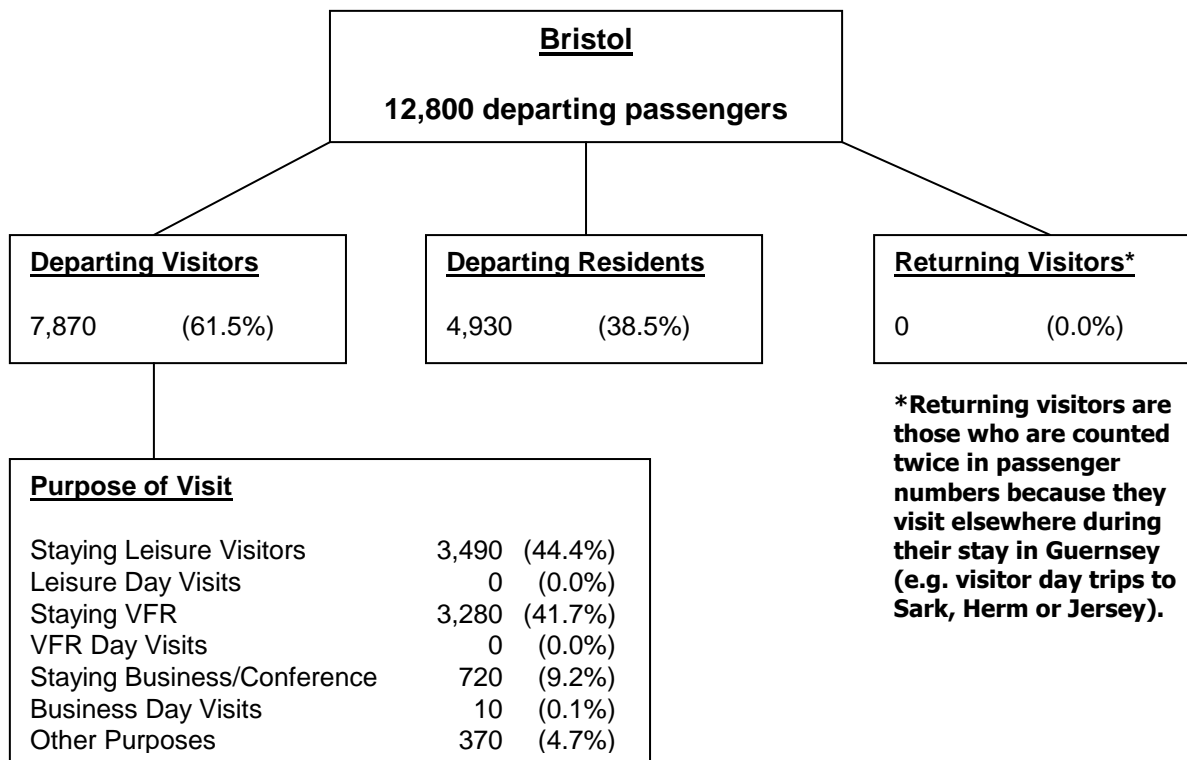
Cumulative Passenger Departures by Route January – December 2013 (including Alderney, Sark and Herm):

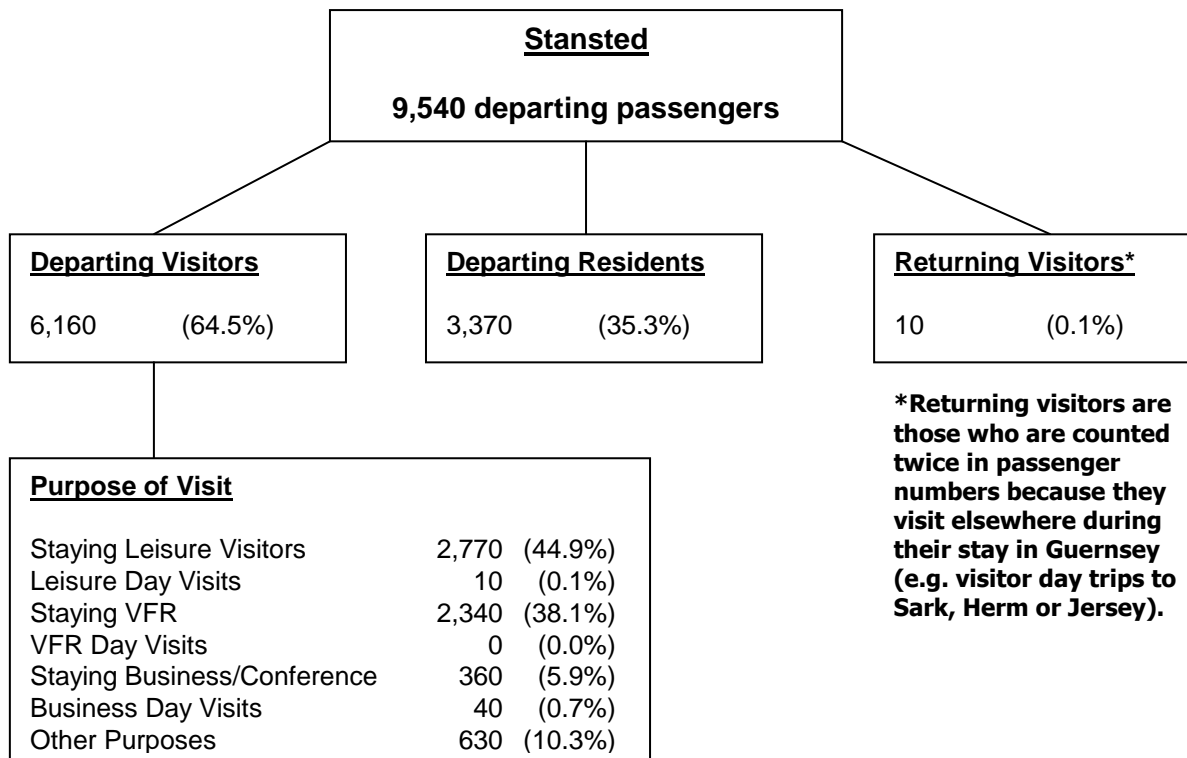
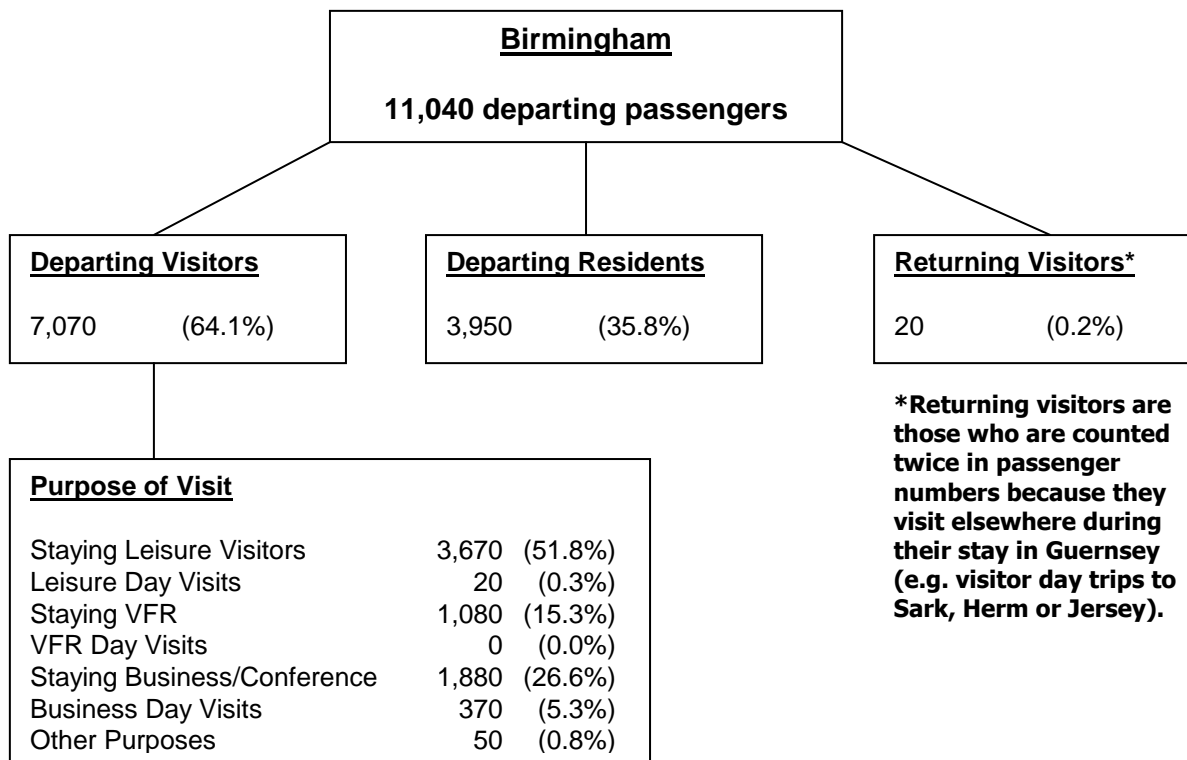
	<u>Volume</u>	<u>% of total pax.</u>	<u>2013 vs. 2012</u>
London Gatwick	173,200	23.7%	0.8%
Southampton	68,100	9.3%	2.4%
Manchester	33,300	4.5%	5.2%
East Midlands	14,700	2.0%	0.6%
Bristol	12,800	1.7%	-3.5%
Exeter	11,100	1.5%	-3.0%
Birmingham	11,000	1.5%	-14.5%
Stansted	9,500	1.3%	-16.4%
Other UK Air	1,500	0.2%	21.6%
Total UK Air	335,200	45.8%	0.1%
Jersey	70,300	9.6%	-1.4%
Alderney	18,500	2.5%	-5.1%
Other	100	*	17.6%
Total CI Air	89,000	12.2%	-2.1%
Dinard	2,200	0.3%	-19.4%
Swiss Air	100	*	-23.0%
Other Foreign Air	3,100	0.4%	-13.7%
Total Foreign Air	5,400	0.7%	-16.3%
Total Air:	429,600	58.7%	-0.6%
UK Sea	83,200	11.4%	7.7%
Herm	75,400	10.3%	19.1%
Jersey	51,800	7.1%	0.3%
Sark	47,800	6.5%	2.0%
St. Malo	36,700	5.0%	-3.9%
Other French Sea	7,500	1.0%	-4.4%
Alderney	200	*	100%
Total Sea:	302,700	41.3%	6.2%
Total Departures:	732,300		2.1%

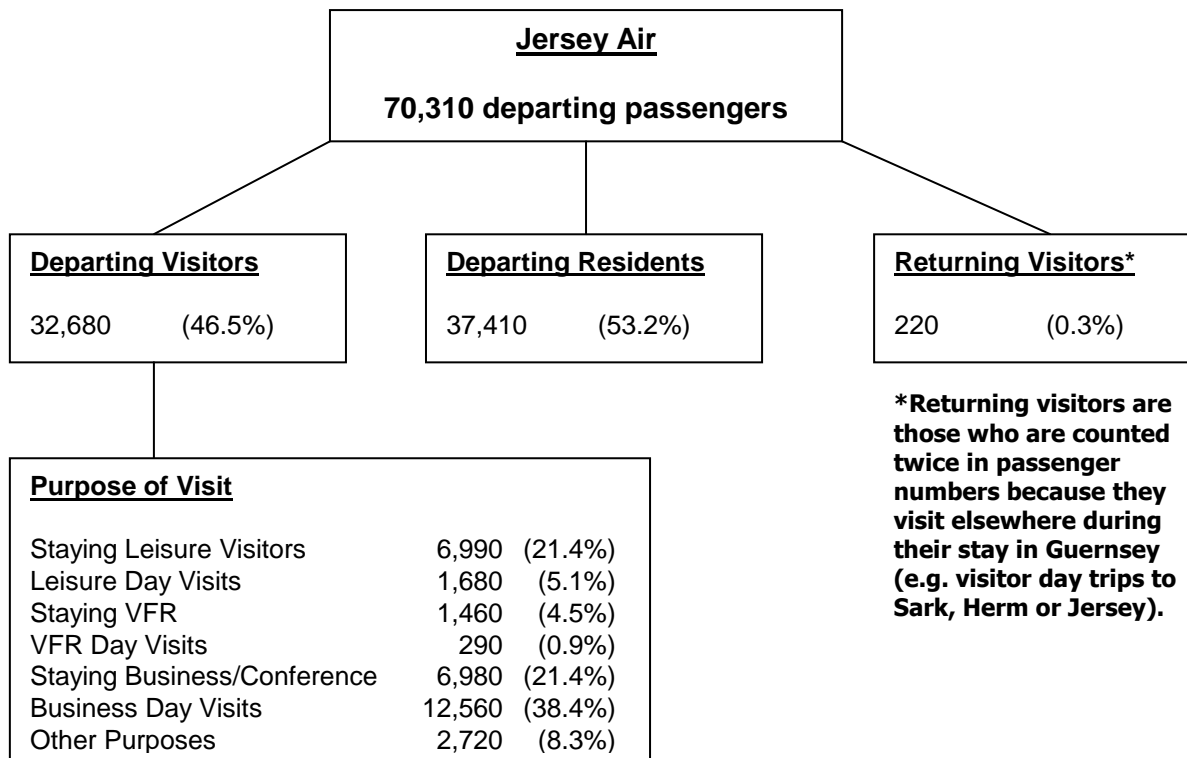
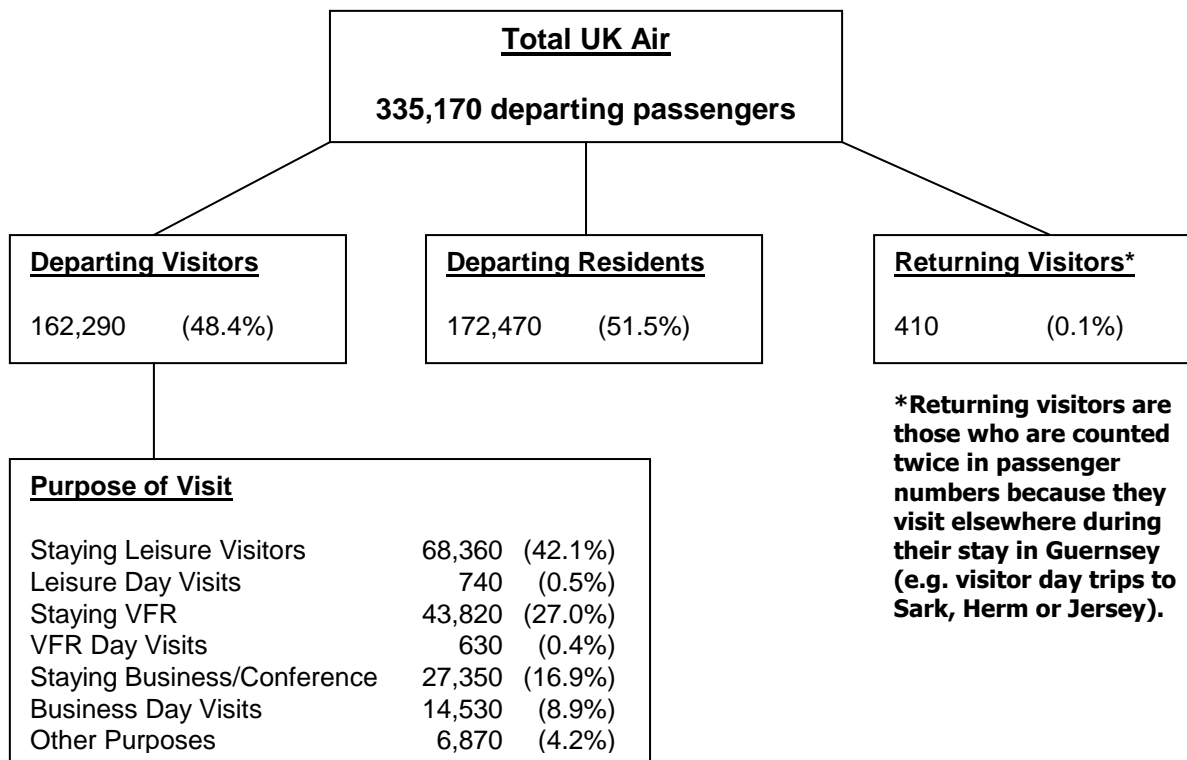
Breakdown of Departing Passengers on Guernsey's Major Routes:

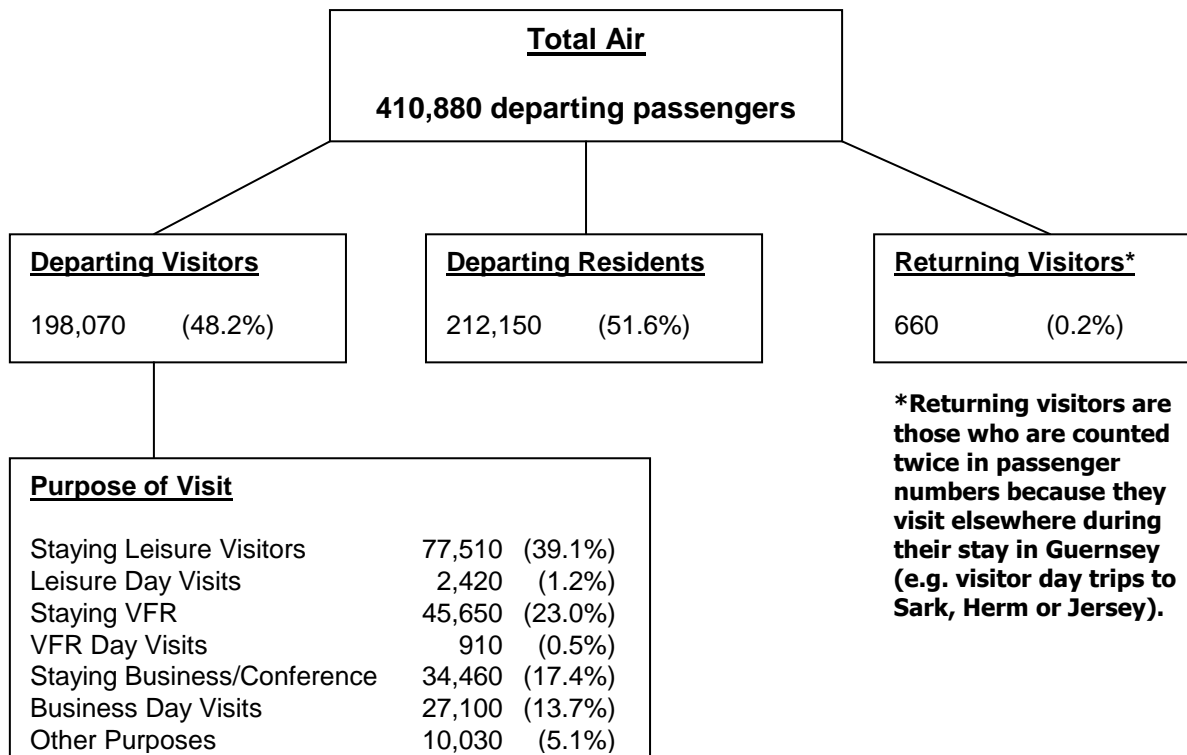
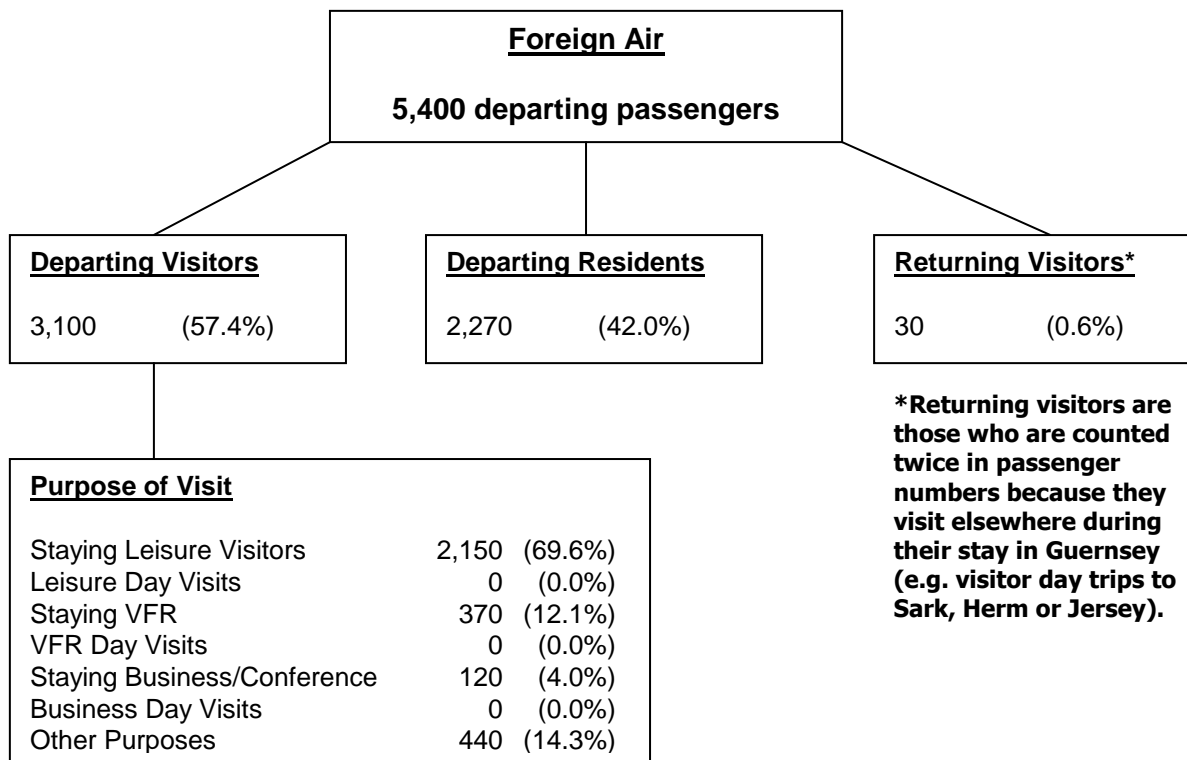


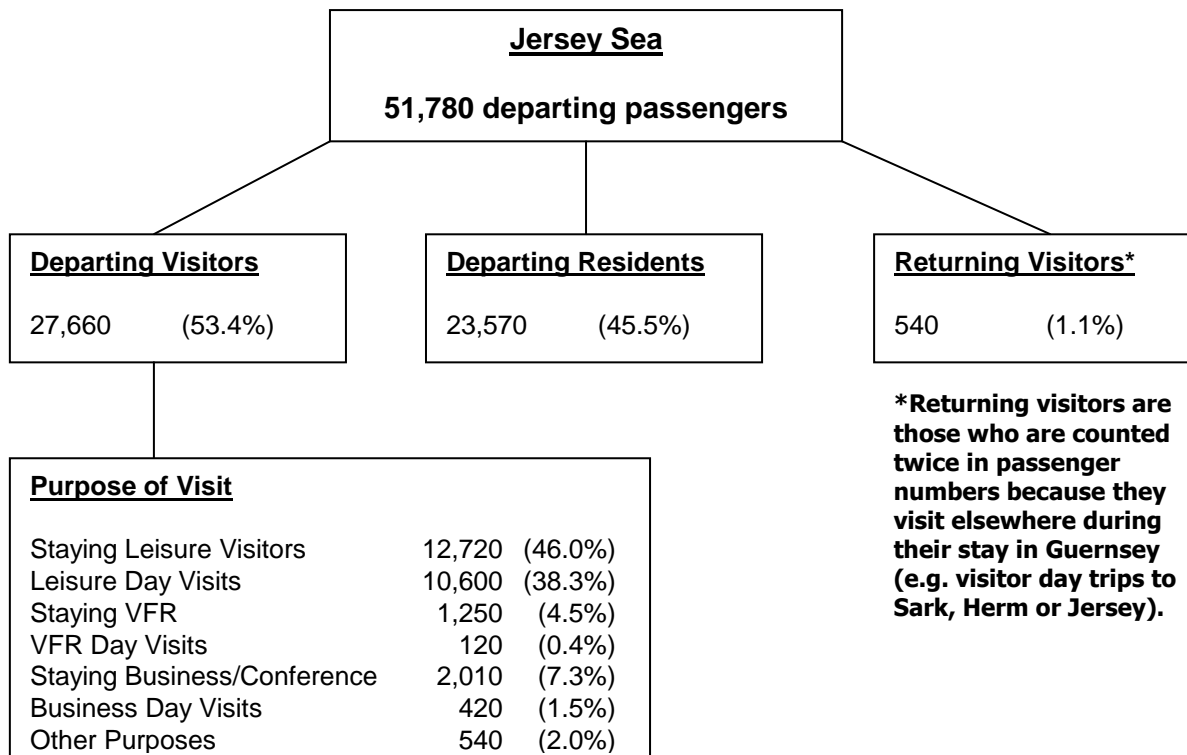
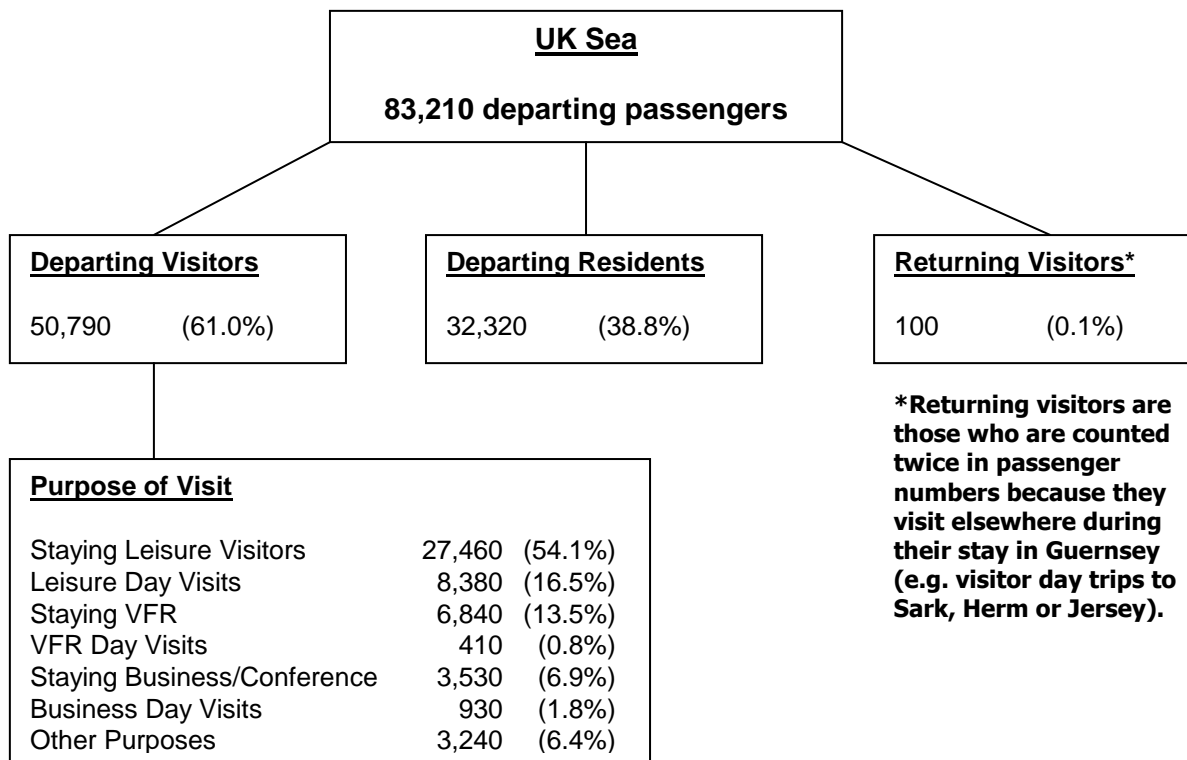


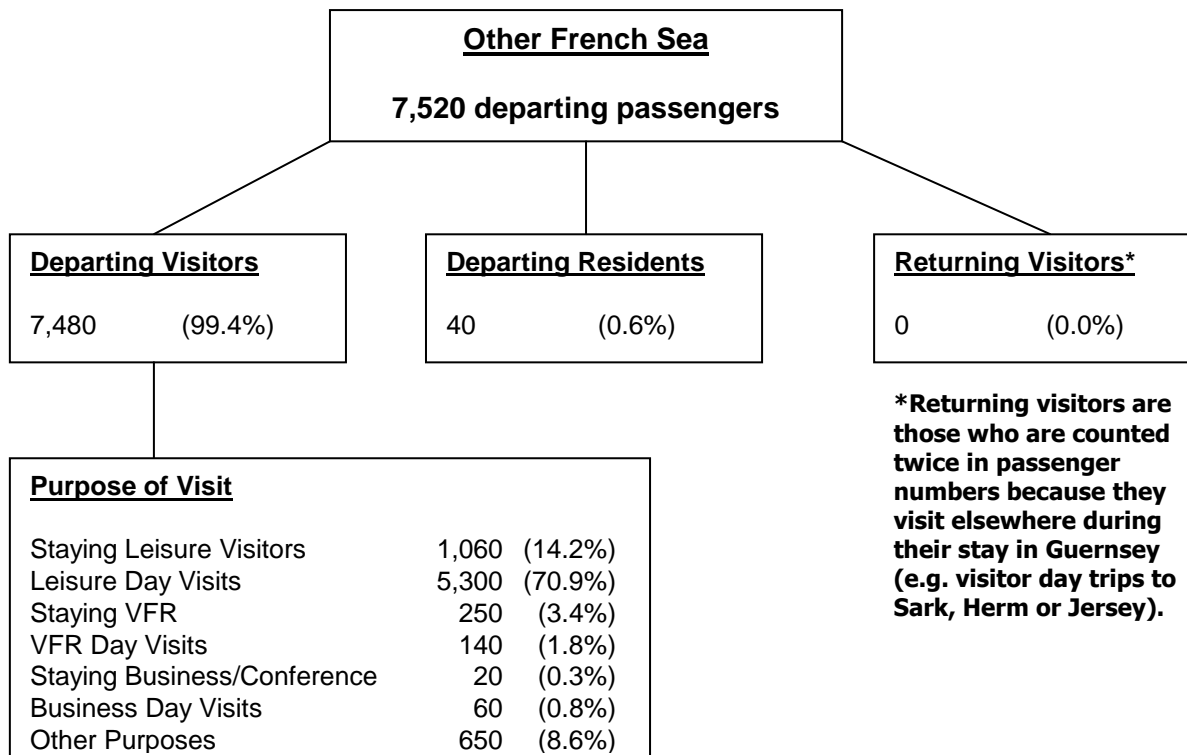
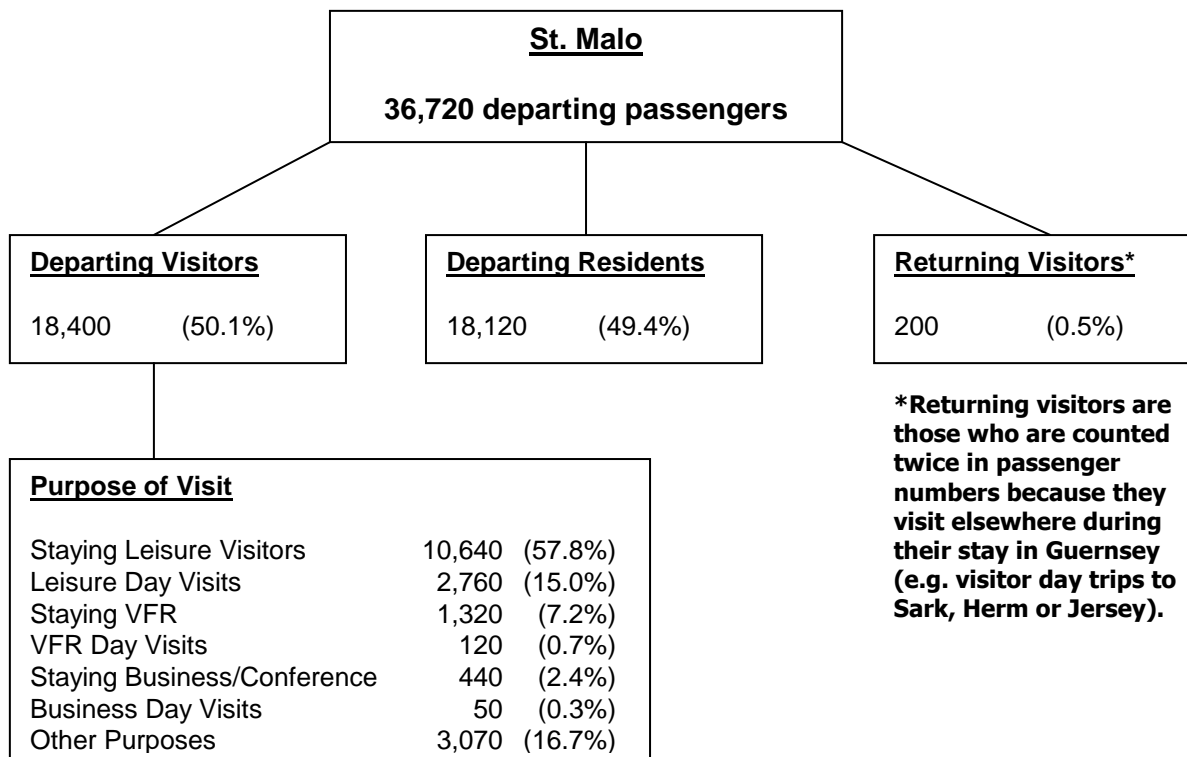


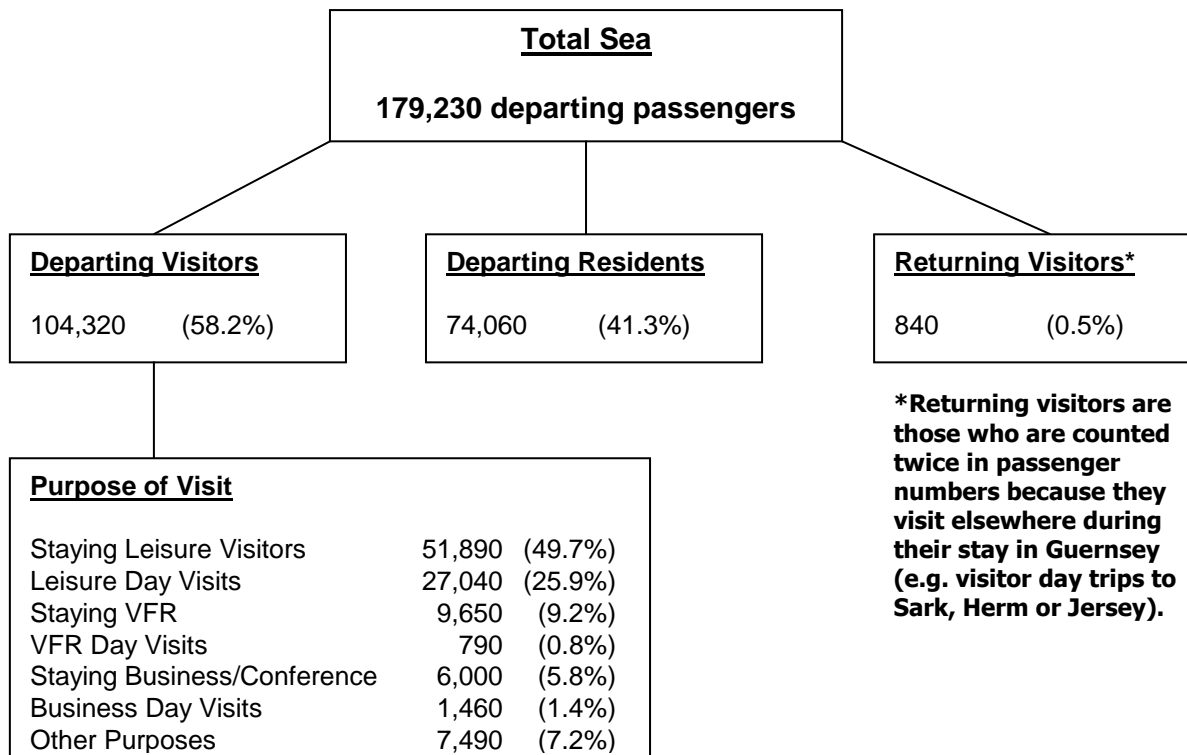
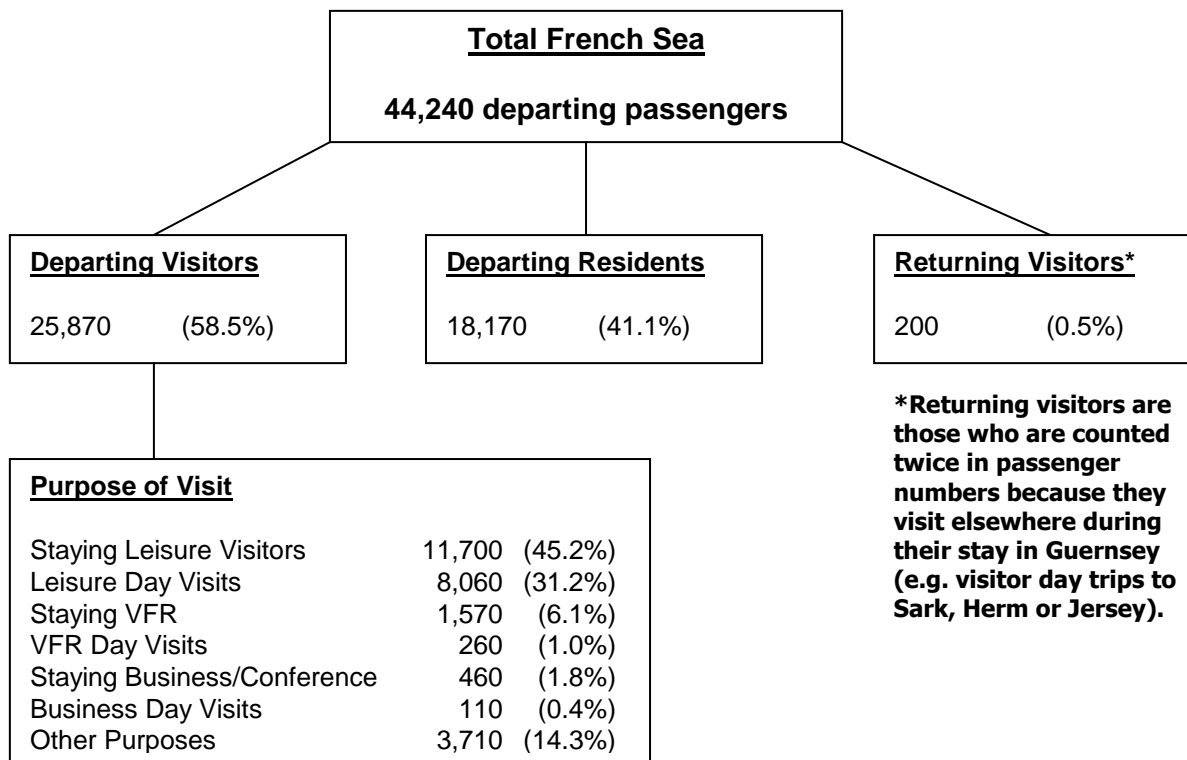












2013 Definitions

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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