2017 Travel Survey

for the States of Guernsey Economic Development Department

RESEARCH REPORT ON Q1 2017

May 3rd 2017

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Summary of Results for Q1

	2016	**2017**	**% change**
Total departing passengers	**92,700**	**85,800**	**-7.4%**
Total departing visitors	32,300	33,500	+3.8%
Departing visitors by air	29,000	28,800	-0.6%
Departing visitors by sea	3,300	4,700	+41.8%
Staying leisure visitors	7,700	7,300	-4.9%
Visiting friends and relatives	11,300	8,900	-20.9%
Staying business / conference	6,500	8,700	+35.3%
Leisure day visits	700	1,300	+82.9%
Business day visits	3,900	4,200	+7.2%
Total for the above purposes of visit *	**30,100**	**30,400**	**+1.0%**
Total staying visitors	26,200	27,050	+3.3%
Average length of stay**	4.03 nights	4.09 nights	+1.3%
Total overnight stays (bed nights) **	104,750	108,100	+3.2%
Total staying in commercial accommodation	15,550	17,250	+11.0%
Average stay in commercial accommodation	2.96 nights	3.07 nights	+3.8%
Bed nights in commercial accommodation	46,000	52,900	+15.2%
Day visits	6,100	6,400	+5.6%
UK visitors	24,800	25,200	+1.5%
Jersey visitors	4,300	5,000	+15.4%
Other nationalities	3,100	3,300	+5.3%
Cruise ship passengers ***	0	1,108	
Visiting yachtsmen ***	225	219	-2.7%
Departing Guernsey residents	60,200	52,000	-13.7%
Departing residents by air	55,000	44,900	-18.3%
Departing residents by sea	5,200	7,100	+35.3%
Net Promoter Score	42%	39%	

N.b. All of the above figures exclude passengers on the inter-Bailiwick air and sea routes of Alderney, Sark and Herm.
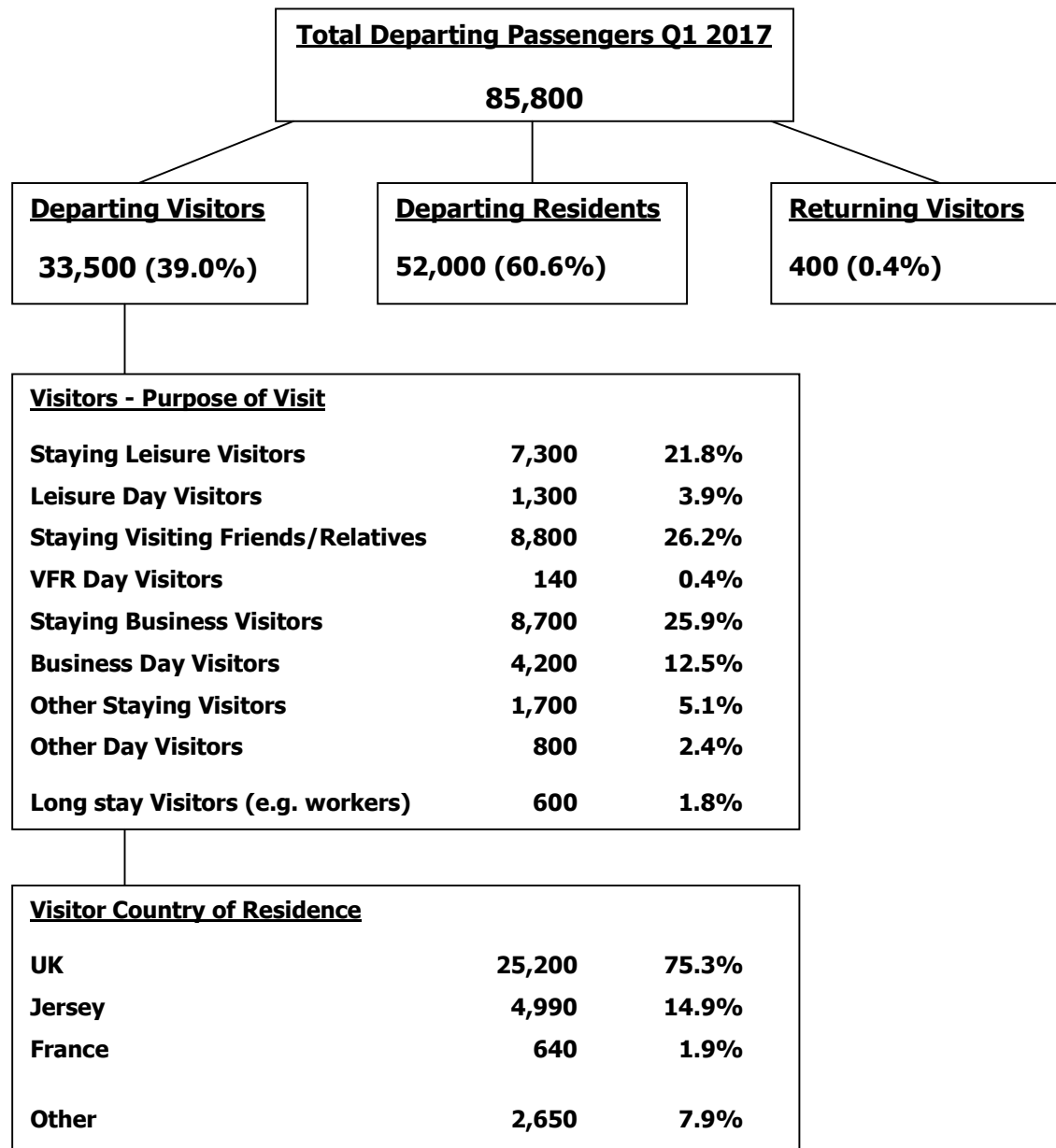
* These figures exclude "Other staying", "Other day" and "Long stay" visitors as shown in the breakdown on page 2 and as defined in the appendices.

** 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.

## Q1 Survey Results – Excluding Alderney, Sark and Herm Departures

Excluding the Alderney, Sark and Herm routes, the passenger numbers for the **first quarter** of 2017 were broken down as follows:

Total Departing Passengers Q1 2017
85,800

Departing Visitors	**Departing Residents**	**Returning Visitors**
33,500 (39.0%)	**52,000 (60.6%)**	**400 (0.4%)**

Visitors - Purpose of Visit

Staying Leisure Visitors	7,300	21.8%
Leisure Day Visitors	1,300	3.9%
Staying Visiting Friends/Relatives	8,800	26.2%
VFR Day Visitors	140	0.4%
Staying Business Visitors	8,700	25.9%
Business Day Visitors	4,200	12.5%
Other Staying Visitors	1,700	5.1%
Other Day Visitors	800	2.4%
Long stay Visitors (e.g. workers)	600	1.8%

Visitor Country of Residence

UK	25,200	75.3%
Jersey	4,990	14.9%
France	640	1.9%
Other	2,650	7.9%

In addition to the above, there were **1,108 cruise ships passengers** and **219 visiting yachtsmen** arriving in Guernsey over the period January to March.

Comparisons with 2016

Passenger Departures Q1 2016 and 2017
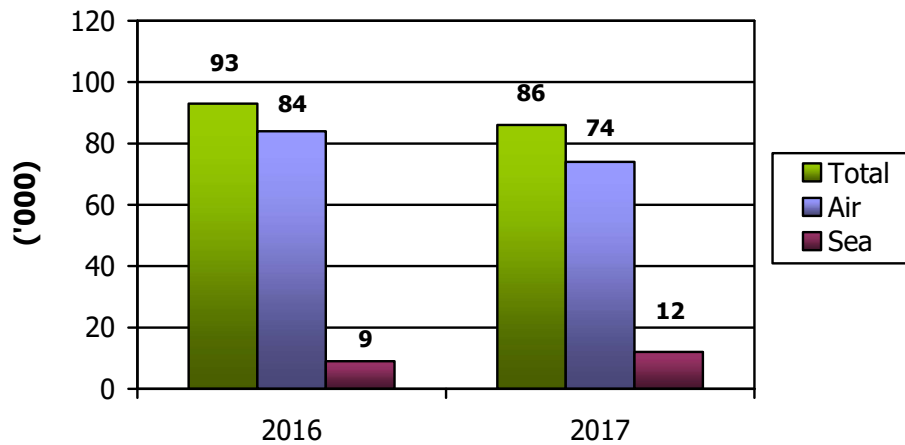
The above figures exclude air and sea departures to Herm, Sark and Alderney.

Compared to Quarter 1 2016, there has been a 7.4% decrease in passenger departures from Guernsey, with a 12.0% decrease in passenger departures by air and a 38.4% increase in passenger departures by sea.

Visitors vs. Residents Q1 2016 and 2017
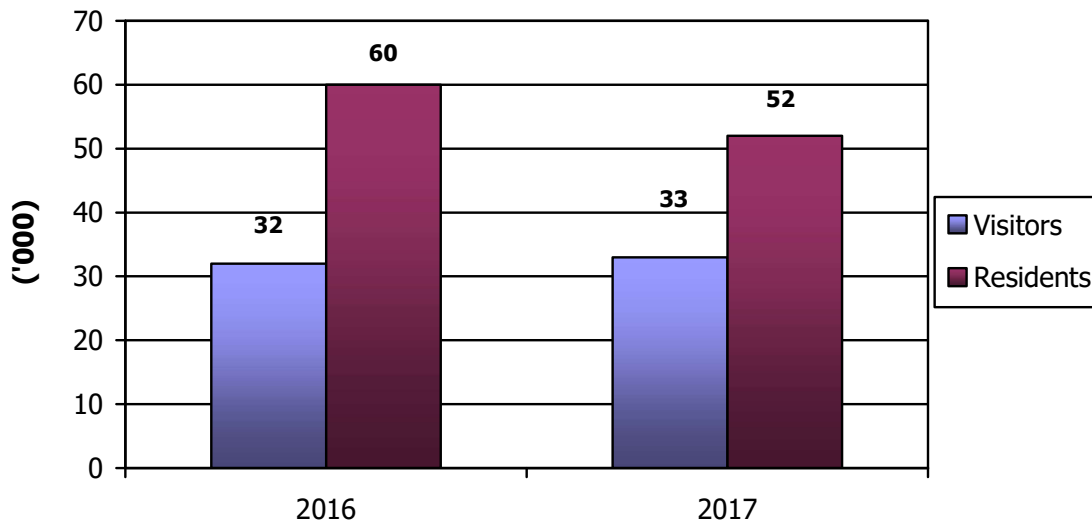
Excluding travel from within the Bailiwick, there were **33,500 visitor departures** between January and March 2017 and **52,000 resident departures**.
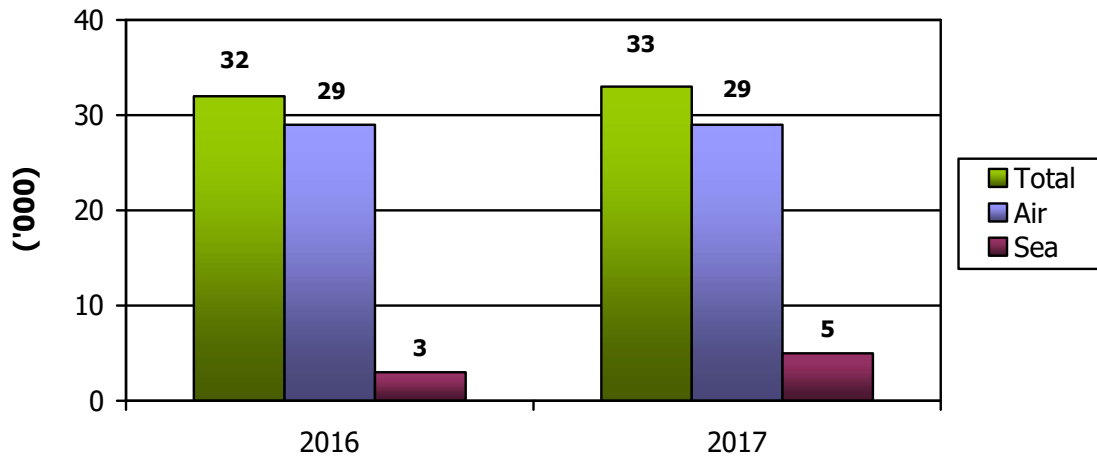
Visitor departures have **increased by 3.8%** compared to Quarter 1 2016.

Excluding "returning visitors", 39.2% of departing passengers in Quarter 1 2017 were visitors to Guernsey, compared to 34.8% over the same period in 2016.

For air passengers, 28,800 (38.9%) were departing visitors and 44,900 were departing residents.
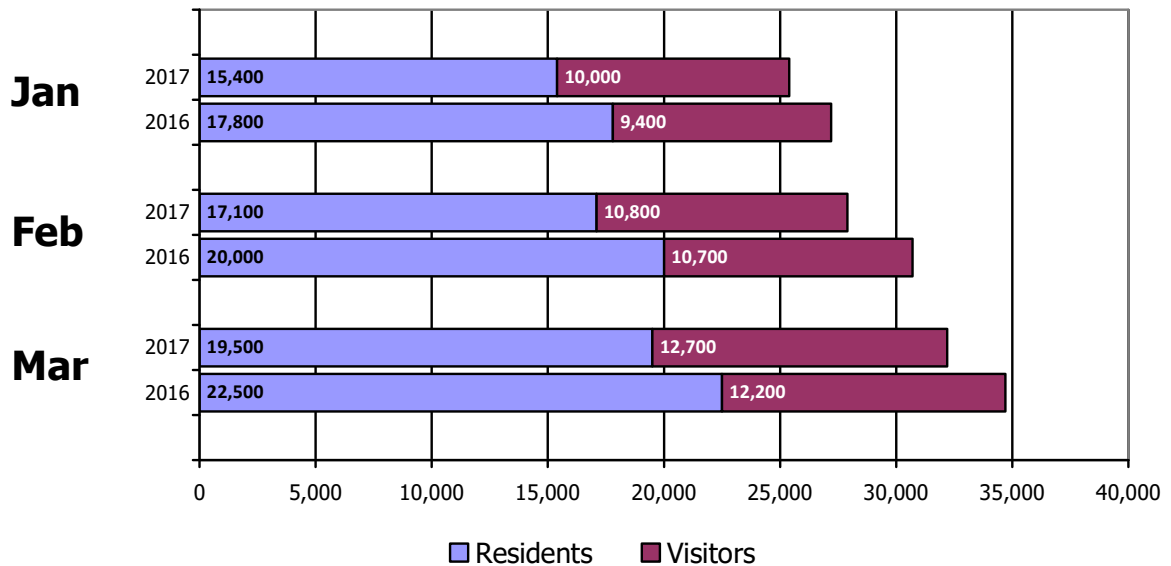
For sea passengers, 4,700 (39.7%) were departing visitors and 7,100 were departing residents.

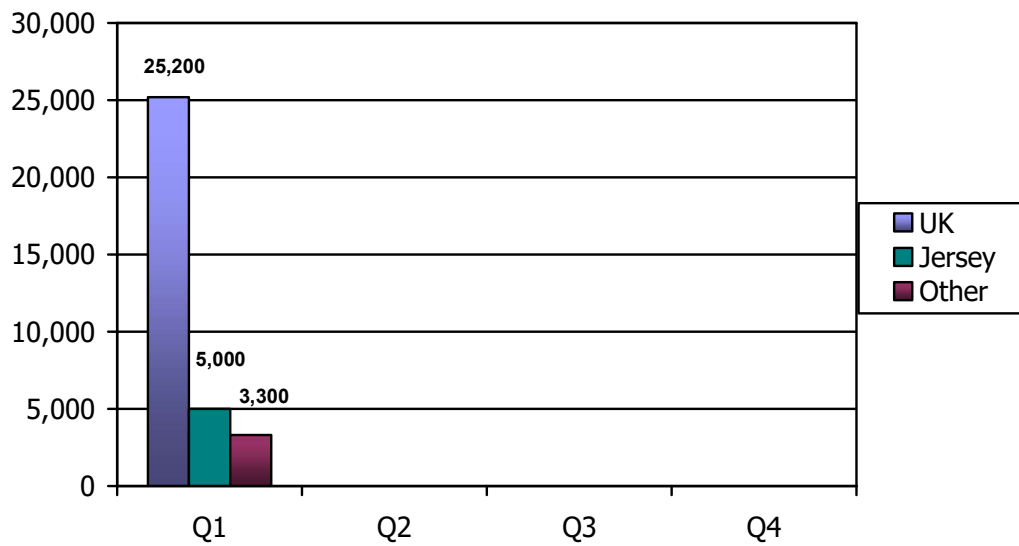## Visitor Volumes by Travel Method Q1 2016 and 2017

Compared to Quarter 1 2016, there has been a 0.6% decrease in visitors to Guernsey by air and a 41.8% increase in visitors by sea.

Visitor and Resident Departures by Month 2016 and 2017

Visitor departures increased by 6.3% in January, by 1.3% in February, and by 4.0% in March.

Visitor Country of Residence by Quarter 2017

75.3% of visitors to Guernsey in Quarter 1 2017 were resident in the UK (+1.5%), with 14.9% coming from Jersey (+15.4%) and the remaining 9.8% coming from other countries (+5.3%).
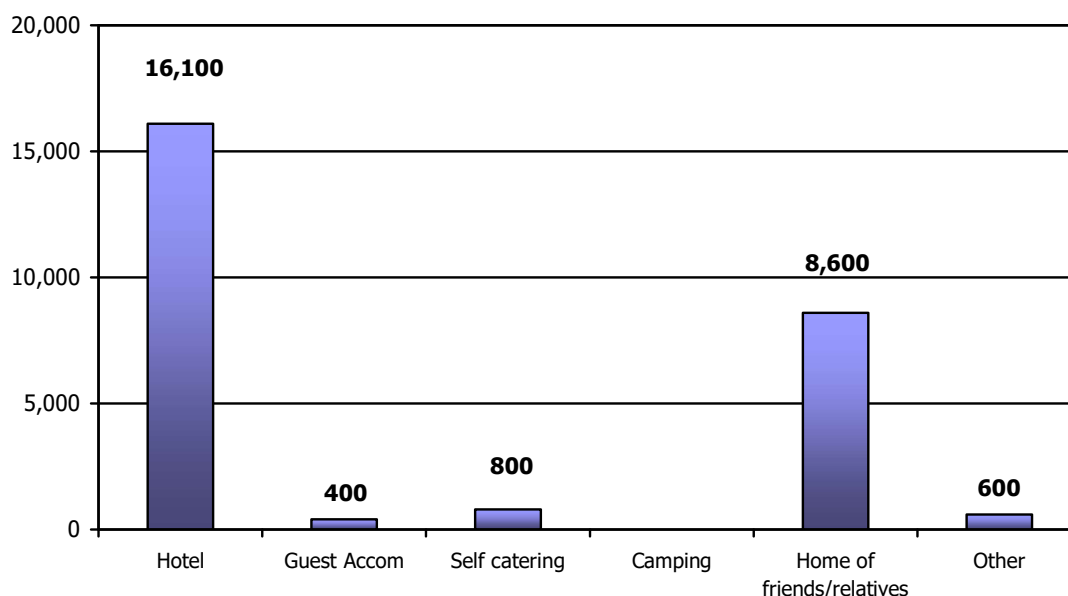
Staying Visitors vs. Day Visits by Quarter 2017
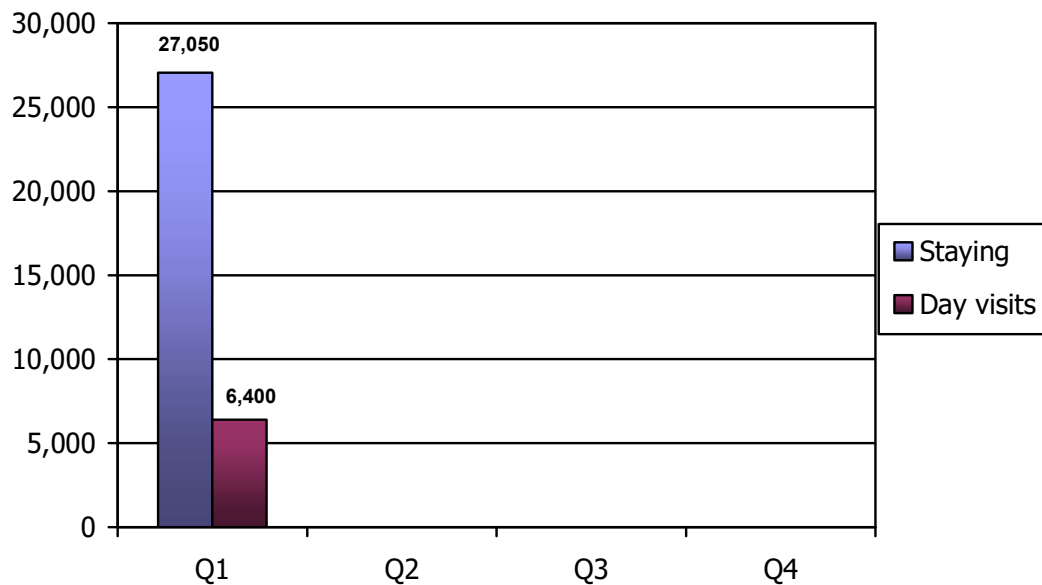
Compared to Quarter 1 2016, there has been a 3.3% increase in visitors staying in Guernsey for at least 1 night, and a 5.6% increase in day visits to Guernsey.
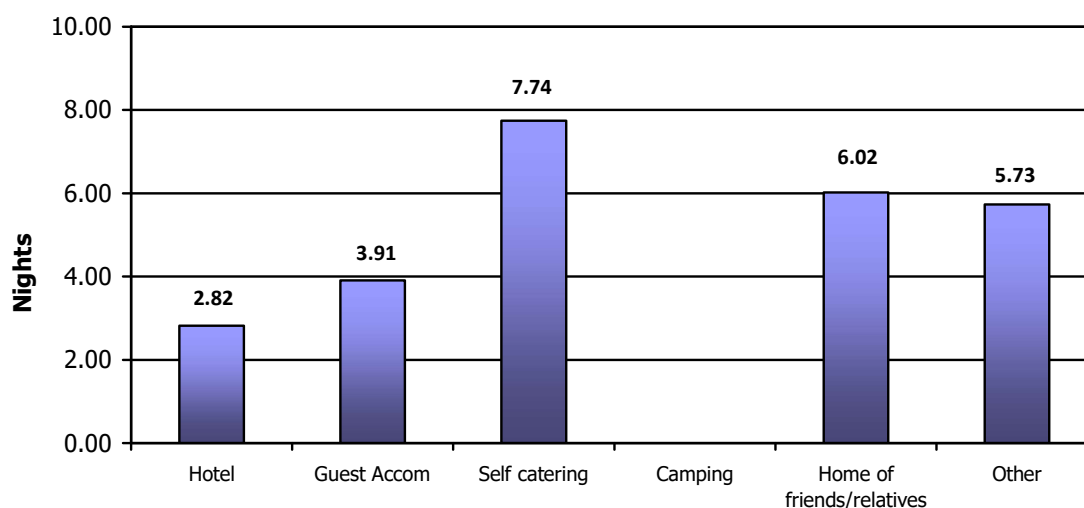
Accommodation used by Staying Visitors in Quarter 1 2017

Volume of Visitors by Accommodation Type Q1 2017

20,000

15,000

10,000

5,000

0

16,100 Hotel

400 Guest Accom

800 Self catering

Camping

8,600 Home of friends/relatives

600 Other

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

Average Length of Stay by Accommodation Type Q1 2017

10.00

8.00

6.00

4.00

2.00

0.00

Nights

2.82 Hotel

3.91 Guest Accom

7.74 Self catering

Camping

6.02 Home of friends/relatives

5.73 Other

In total, there were **108,080** overnight stays in Guernsey in Quarter 1 2017 (+3.2%), with **52,900** bed nights sold in commercial accommodation (+15.2%).
The full breakdown was as follows:

Hotel bed nights:	45,300
Guest accommodation:	1,600
Self catering:	6,000
Camping:	0
Staying with friends/relatives:	51,500
Other	3,600

The overall average stay in Q1 for those spending at least a night in Guernsey was 4.09 nights, up from 4.03 nights in Q1 2016.

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 Q1 2017
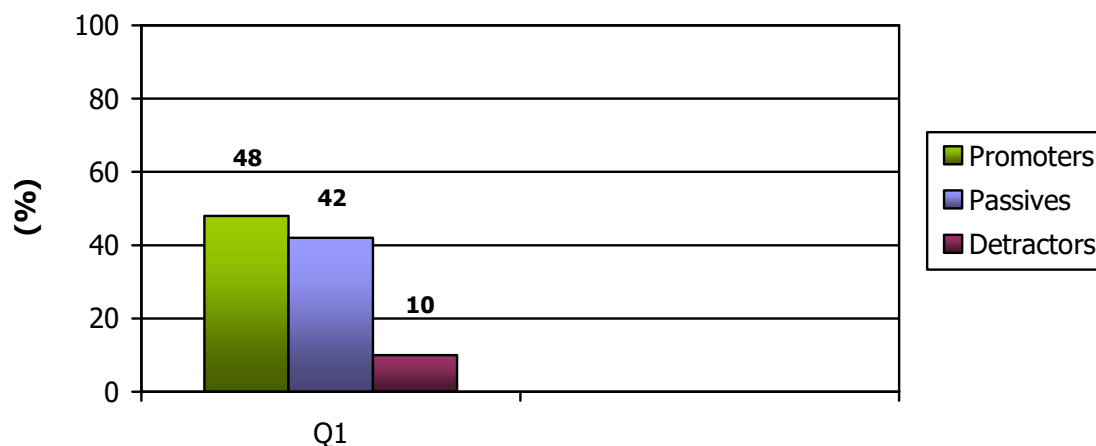
"Promoters" gave a score of 9 or 10, "Passives" gave a score of 7 or 8 and "Detractors" gave a score of 0 to 6.
The Net Promoter Score is calculated by subtracting the proportion of detractors from the proportion of promoters.

The overall average score in Q1 2017 was 8.38, with the Net Promoter Score being 38.8. This compares with an average score in Q1 2016 of 8.41 and an NPS of 41.9.

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

	Average Score	**Net Promoter Score**
Overall	**8.38**	**38.8**
Staying leisure visitors	8.79	55.2
Leisure day visitors	8.62	44.4
Staying VFR	8.87	57.8
Staying business visitors	8.13	28.7
Business day visitors	7.85	16.3

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 January to March 2017, **14,080** (19.1%) of the 73,690 departing air passengers were flying to an onward final destination.

10,920 (24.3%) of the 44,880 Guernsey residents travelling by air were flying to an onward destination and **3,160** (11.0%) of the 28,800 visitors to Guernsey departing by air were flying to an onward destination.

The breakdown for Q1 by route was as follows:

	Visitor departures	**Visitors travelling onward**	**Resident departures**	**Residents travelling onward**
Gatwick	9,270	1,800	21,920	9,090
Southampton	4,380	500	6,270	500
Manchester	2,990	100	2,740	240
Birmingham	1,230	190	1,580	480
East Midlands	690	10	520	0
Exeter	1,250	50	1,680	120
Stansted	1,200	70	320	90
London City	1,490	120	1,540	110
Bristol	720	20	830	50
Other UK Air	370	0	190	0
TOTAL UK AIR	**23,600**	**2,860**	**37,600**	**10,680**
Jersey air	5,050	300	6,730	240
Foreign air	150	0	550	5
TOTAL AIR	**28,805**	**3,160**	**44,880**	**10,920**

The main destinations/airports that passengers were travelling on to in Q1 were as follows:

1. Spanish mainland   930 passengers   (280 visitors)
2. Scottish airports   900 passengers   (380 visitors)
3. South Africa   760 passengers   (110 visitors)
4. Canary Islands   760 passengers   (0 visitors)
5. Madeira   740 passengers   (30 visitors)
6. USA   670 passengers   (110 visitors)
7. Switzerland   670 passengers   (200 visitors)
8. Caribbean   560 passengers   (10 visitors)
9. Portugal   550 passengers   (20 visitors)
10. Ireland   540 passengers   (170 visitors)
11. English airports   520 passengers   (330 visitors)
12. Netherlands   370 passengers   (100 visitors)
13. Germany   350 passengers   (160 visitors)
14. Italy   320 passengers   (30 visitors)
15. France   320 passengers   (140 visitors)
16. Latvia   310 passengers   (50 visitors)
17. Australia   300 passengers   (140 visitors)
18. Northern Ireland   270 passengers   (120 visitors)
19. Canada   260 passengers   (20 visitors)
20. Austria   240 passengers   (30 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 2016 vs. 2017**
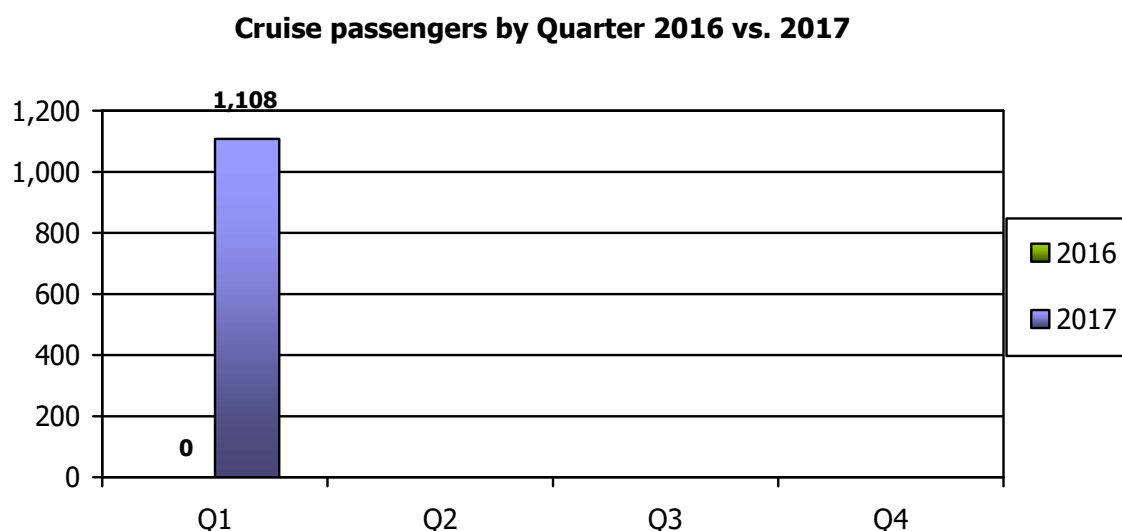
Over Q1 2017, there were 1,108 cruise passenger arrivals compared to 0 in Q1 2016.

Visitors who had visited Guernsey previously are asked whether they had ever visited Guernsey before on a cruise.

From the 1,692 respondents who answered this question over the first 3 months of 2017, **22 (1.3%)** said that they had previously visited Guernsey 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 2016 vs. 2017
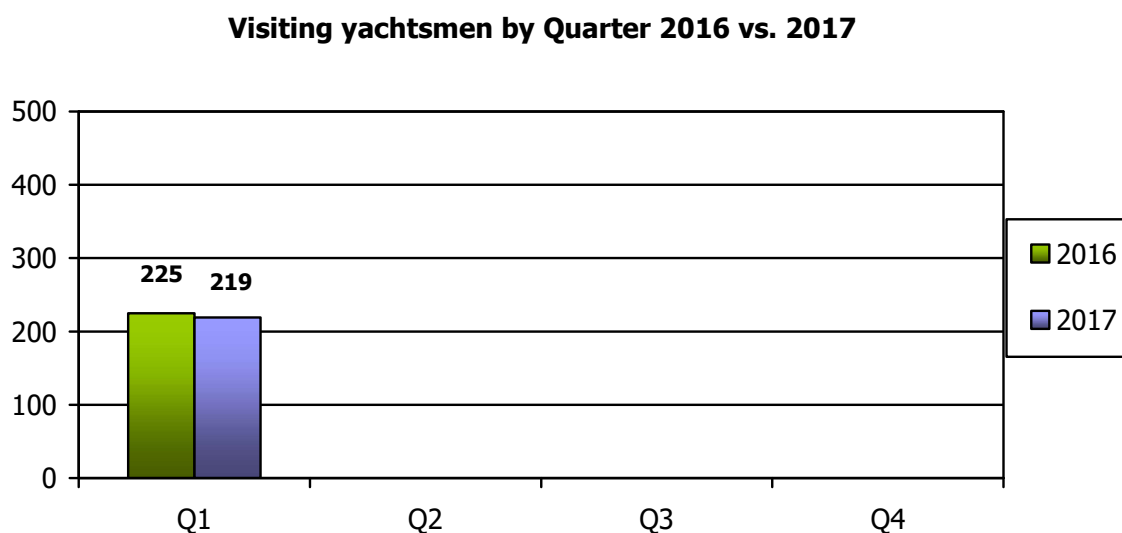
Over Q1 2017, the number of pleasure passenger arrivals was **219 (-2.7%)** compared to 225 in Q1 2016.

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 Economic Development Department, Visit Guernsey, 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 was also evident that the definition of holidaymakers and those visiting friends and relatives has differed between previous surveys (See 2017 definitions in the appendices).

The broad objectives of the 2017 Exit Survey are as follows:

➢ Determine the passenger composition of each of Guernsey's main air and sea transport routes across the whole of 2017
➢ 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 first 2017 quarterly report on passenger departures between January and March (Q1 2017).

Methodology

As with previous exit surveys, face-to-face interviews are being conducted with departing passengers throughout 2017, 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 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. Translations are provided for assistance.

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 January and March 2017, **286 interviewer hours** were allocated to this Passenger Calibration Survey. The exact shift schedules were flexible in order to account for 2017 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 Q1 therefore comes from **4,819 interviews, representing 8,248 departing passengers (9.6% of Guernsey's total departing passengers, excluding the Alderney, Sark and Herm routes, over Q1 2017)** - 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 8,000 passengers provides a strong degree of statistical confidence in the results for Q1 2017. 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.

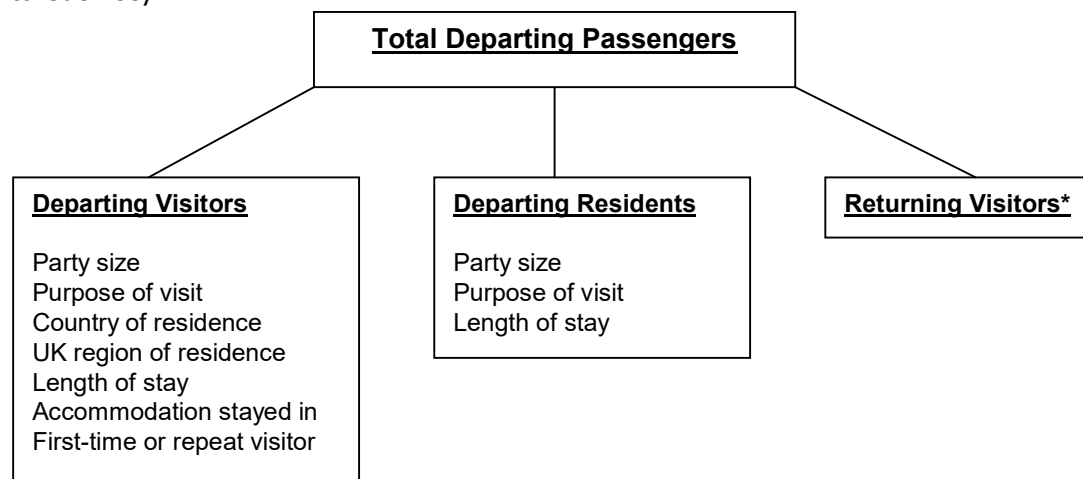| Sample Size	Research Results				
	10% or 90%	20% or 80%	30% or 70%	40% or 60%	50%
4,800	+/- 0.8	+/- 1.1	+/- 1.3	+/- 1.4	+/- 1.4
2,000	+/- 1.3	+/- 1.7	+/- 2.0	+/- 2.1	+/- 2.2
1,000	+/- 1.9	+/- 2.5	+/- 2.8	+/- 3.0	+/- 3.1
500	+/- 2.6	+/- 3.5	+/- 4.0	+/- 4.3	+/- 4.4

Based upon a total sample size from Q1 of 4,800, a finding that 39.0% of respondents were departing visitors would mean that the true figure for all respondents is 95% likely to be within the range 37.6% to 40.4%, 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 2,000, the finding that 21.8% were staying leisure visitors would have a statistical variation of between 20.0% and 23.6%. 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 **13.7%** in Q1 2017. This refusal rate shows a large increase over the 6.7% achieved in Q1 2016.

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:

Total Departing Passengers

Departing Visitors

Party size
Purpose of visit
Country of residence
UK region of residence
Length of stay
Accommodation stayed in
First-time or repeat visitor

Departing Residents

Party size
Purpose of visit
Length of stay

Returning Visitors*

*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 2017, 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.

2017 Passenger Departures Including Alderney, Sark and Herm Departures

Cumulative Passenger Departures by Route January – March 2017 (<u>including</u> Alderney, Sark and Herm):

	Volume	% of total pax.	2017 vs. 2016
London Gatwick	31,330	33.9%	-3.3%
Southampton	10,690	11.6%	-34.3%
Manchester	5,750	6.2%	3.5%
London City	3,040	3.3%	2.3%
Birmingham	2,810	3.1%	3.7%
Exeter	2,950	3.2%	12.8%
Bristol	1,560	1.7%	-21.7%
East Midlands	1,210	1.3%	-39.2%
Stansted	1,580	1.7%	-0.2%
Other UK Air	570	0.6%	1020%
Total UK Air	**61,480**	**66.6%**	**-9.8%**
Jersey	11,820	12.8%	-21.7%
Alderney	2,990	3.2%	-18.0%
Total CI Air	**14,810**	**16.0%**	**-21.0%**
Dinard	280	0.3%	-29.9%
Swiss Air	250	0.3%	1195%
Other Foreign Air	180	0.2%	-60.9%
Total Foreign Air	**710**	**0.8%**	**-19.8%**
Total Air:	**77,000**	**83.4%**	**-12.3%**
UK Sea	7,040	7.6%	55.9%
Herm	1,620	1.8%	-49.6%
St. Malo	1,890	2.0%	-10.2%
Sark	1,960	2.1%	1.1%
Jersey	2,860	3.1%	50.6%
Other French Sea	0	0%	0%
Alderney	0	0%	0%
Total Sea:	**15,370**	**16.6%**	**12.4%**
Total Departures:	**92,370**		**-9.0%**

2017 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 certified 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.

While Island Ark does not directly employ the interviewers for this survey, the above principals are applied and the interviewers receive the necessary training.

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