

2012 Travel Survey

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

RESEARCH REPORT ON Q2 2012

August 8th 2012

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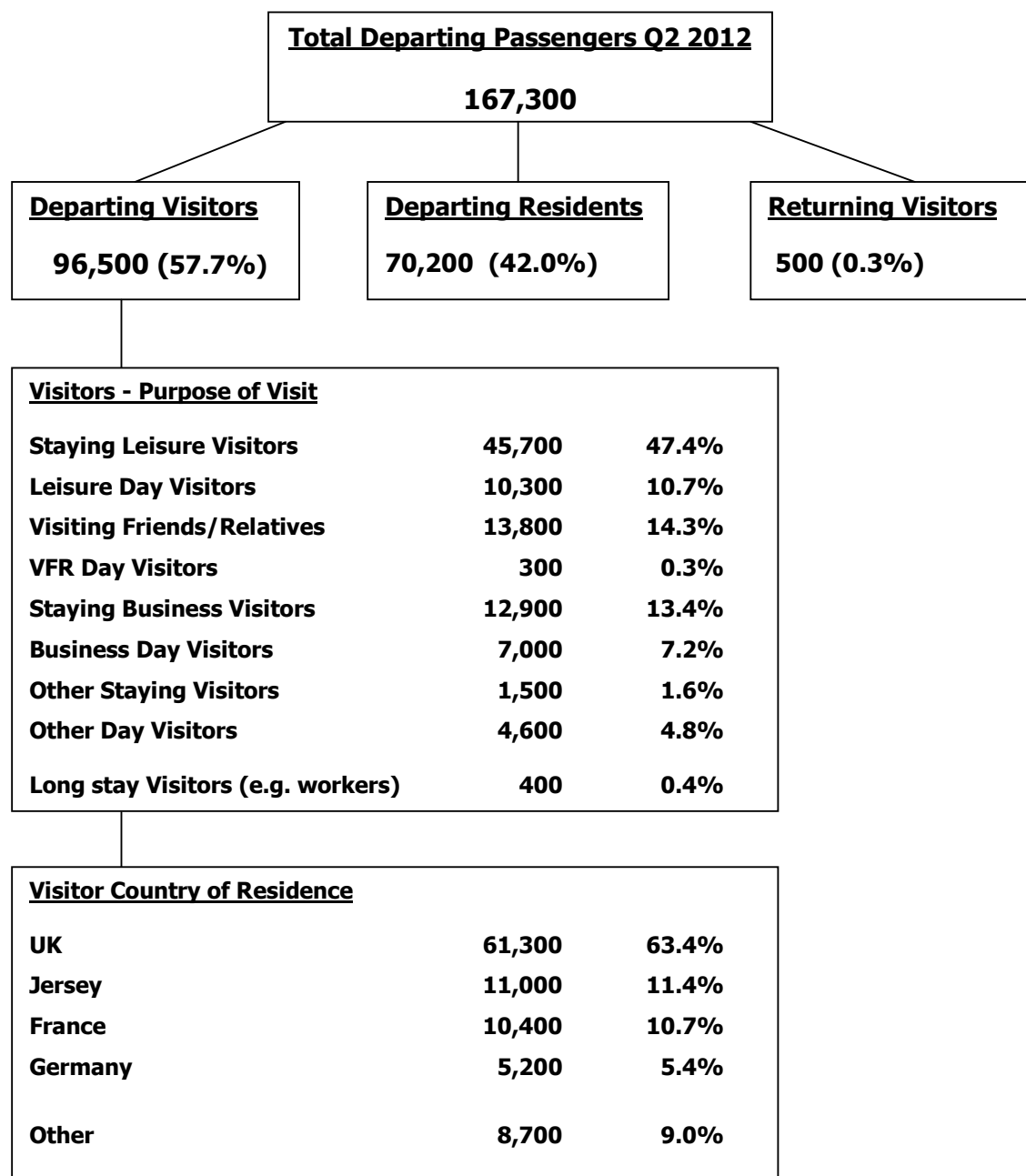
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Summary of Results

- Including the Alderney, Sark and Herm routes, there were **209,200** (-9.4%) departing passengers from Guernsey over the period April through to June 2012 (Q2).
- Excluding the inter-Bailiwick routes, there were **167,300** (-5.7%) departing passengers from the Bailiwick over the period April through to June 2012. Over the first 6 months of 2012, there have been **263,700** departing passengers, representing a decrease of 4.1% (11,400 passengers) compared to the same period in 2011.
- Over Q2, there were **108,000** passenger departures by air (-5.2%) and **59,300** departures by sea (-6.7%). Cumulatively to the end of June there have been **191,300** departures by air (-4.4%) and **74,900** departures by sea (-3.3%).
- Over the first 6 months of 2012, the only air routes to show increases in passenger departures have been Bristol, Stansted and East Midlands, with the Gatwick, Manchester and Jersey routes showing the largest falls in volume. Sea departures on the Jersey route have increased by 8.4%, but have fallen significantly on the French and inter-Bailiwick routes.
- In Q2 alone, there were **96,500** (-6.1%) visitor departures and **70,200** (-5.7%) resident departures. As at the end of June, there have been **136,700** (-7.0%) visitor departures and **126,300** (-1.1%) resident departures.
- In Q2, **55,300** visitors departed on the air routes and **41,200** departed by sea.
- Over the period January to June, staying leisure visitors were down by 11.7% to **54,000**, staying business visitors were down by 5.3% to **23,700**, those visiting friends and relatives were down by 9.0% to **23,100**, leisure day visits were down by 29.4% to **12,900**, and business day visits were down by 4.9% to **15,200**.
- To the end of June, there has been an 8.5% decrease in visitors staying in Guernsey to **102,300** and a 2.1% decrease in day visits to **34,300**.
- **77,300** visitors stayed in commercial accommodation up to the end of June, representing **307,100** bed nights sold. **23,100** visitors stayed with friends or family in Guernsey.
- To the end of June, there have been **89,100** visitors to Guernsey from the UK, **19,100** visitors from Jersey, **11,500** visitors from France, **5,600** visitors from Germany and **11,300** visitors from other markets.

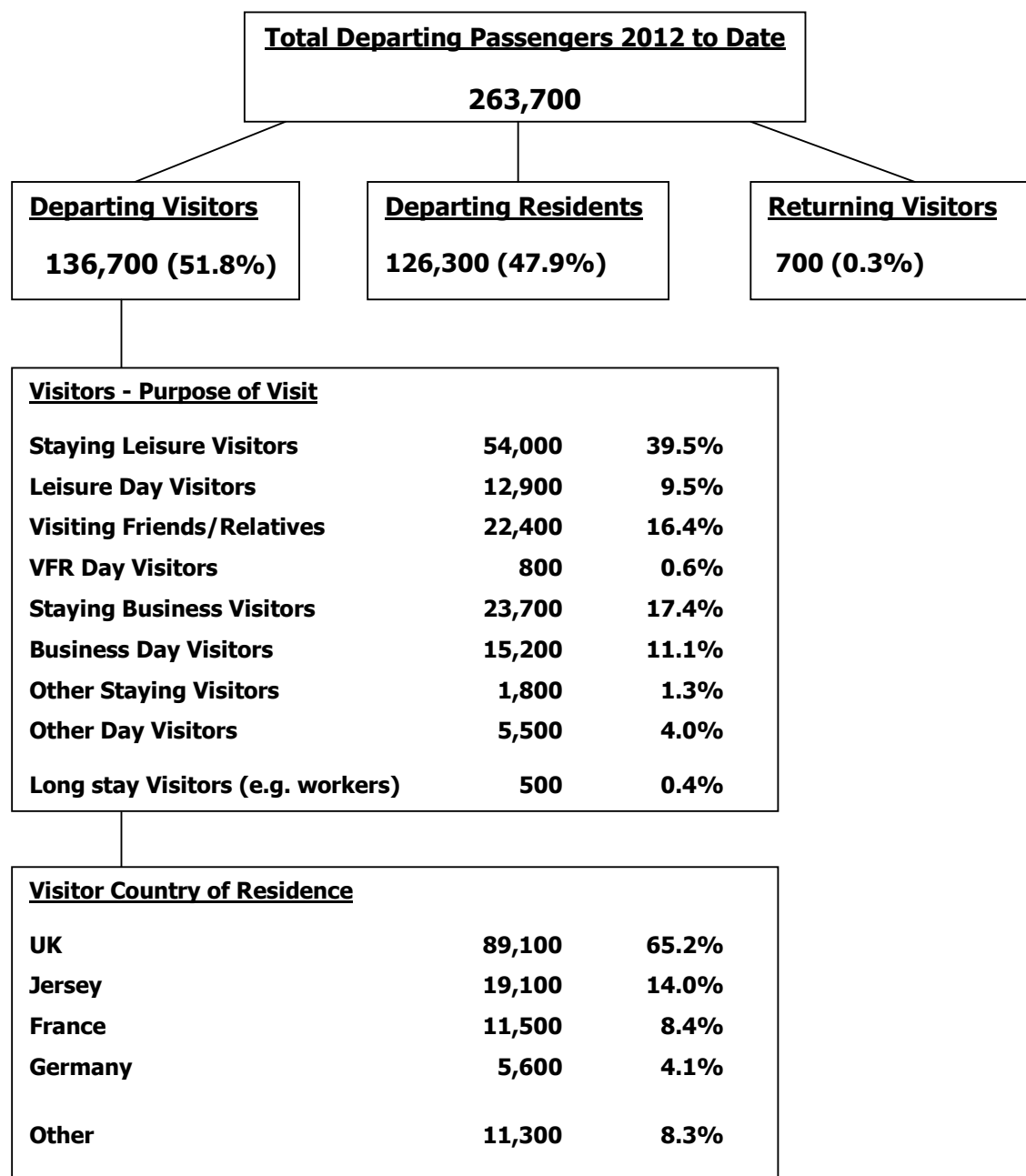
Q2 Survey Results – Excluding Alderney, Sark and Herm Departures

Excluding the Alderney, Sark and Herms routes, the passenger numbers for the **second quarter** of 2012 were broken down as follows:



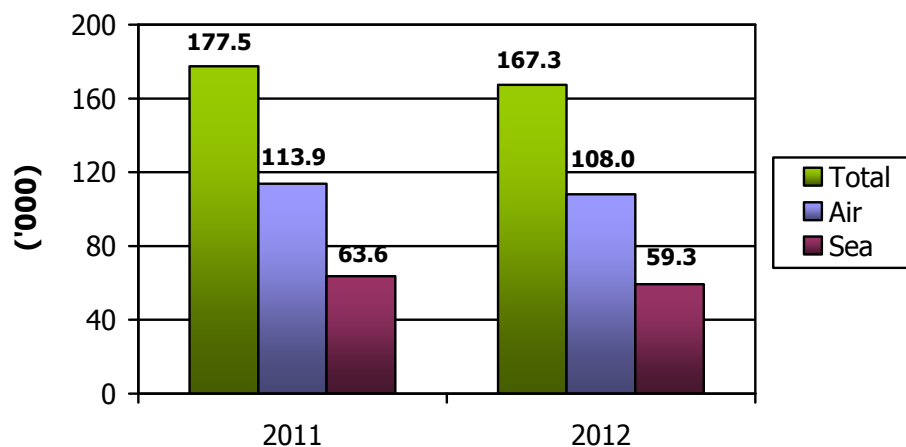
Cumulative Survey Results – January to June

Excluding the Alderney, Sark and Herms routes, the passenger numbers for the **first and second quarters** of 2012 were broken down as follows:



Comparisons with 2011

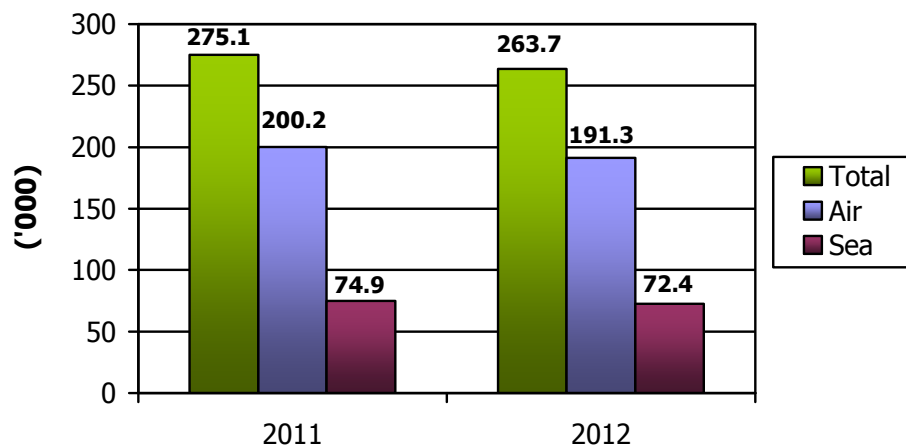
Passenger Departures Q2 2011 and 2012



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

Compared to Quarter 2 2011, there has been a 5.7% decrease in passenger departures from the Bailiwick, with a 5.2% decrease in passenger departures by air and a 6.7% decrease in passenger departures by sea.

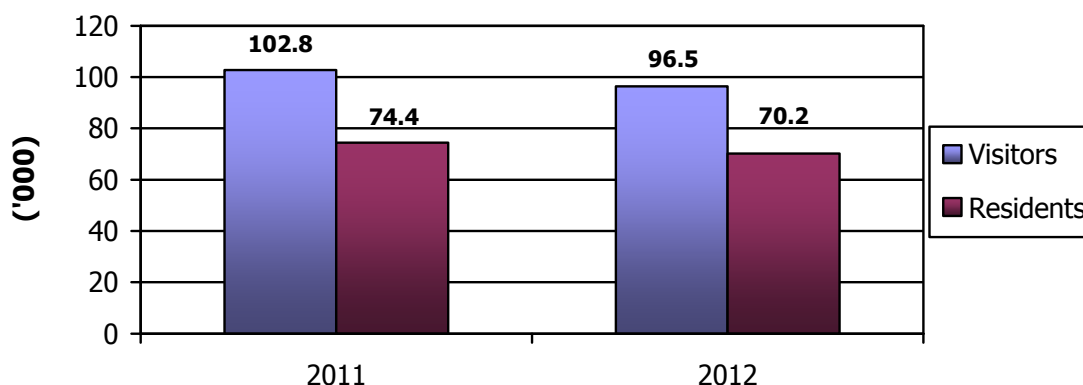
Passenger Departures January to June 2011 and 2012



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

Compared to January to June 2011, there has been a 4.1% decrease in passenger departures from the Bailiwick, with a 4.4% decrease in passenger departures by air and a 3.3% decrease in passenger departures by sea.

Visitors vs. Residents Q2 2011 and 2012



Excluding travel from within the Bailiwick, there were **96,500 visitor departures** between April and June 2012 and **70,200 resident departures**.

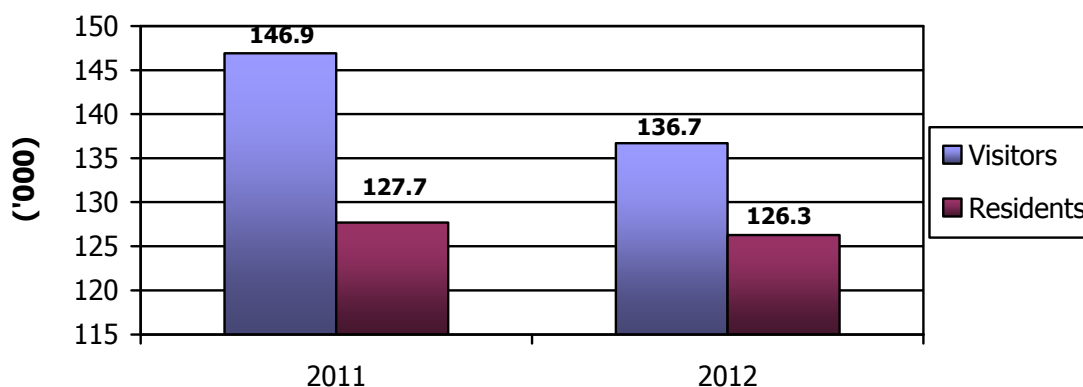
Visitor departures have **decreased overall by 6.1%** compared to Quarter 2 2011.

Excluding the 500 "returning visitors", 57.9% of departing passengers in Quarter 2 2012 were visitors to Guernsey, compared to 58.0% over the same period in 2011.

For air passengers, 55,300 (51.3%) were departing visitors and 52,300 were departing residents.

For sea passengers, 41,200 (69.5%) were departing visitors and 17,900 were departing residents.

Visitors vs. Residents January to June 2011 and 2012



Excluding travel from within the Bailiwick, there were **136,700 visitor departures** between January and June 2012 and **126,300 resident departures**.

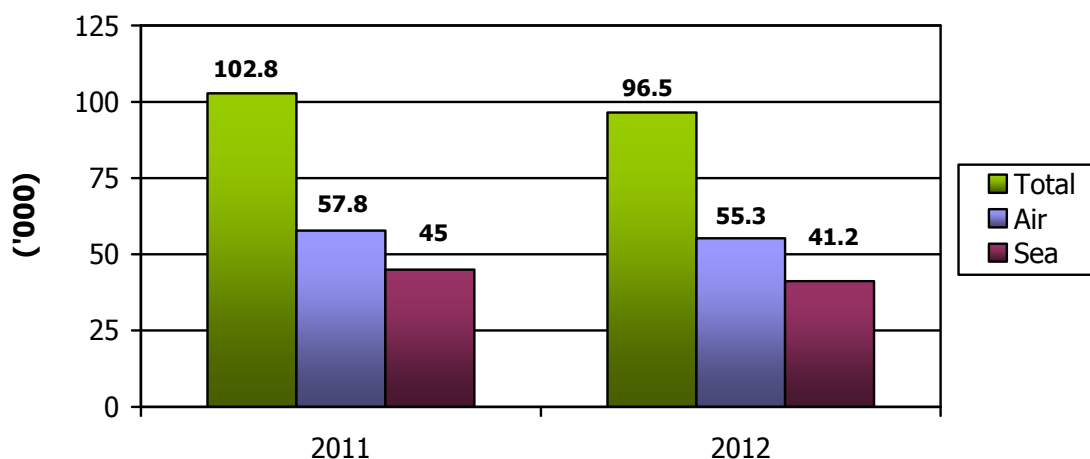
Visitor departures have **decreased overall by 7.0%** compared to the same period in 2011.

Excluding the 700 "returning visitors", 52.0% of departing passengers over the first 6 months of 2012 were visitors to Guernsey, compared to 53.5% over the same period in 2011.

For air passengers, 89,600 (46.9%) were departing visitors and 101,200 were departing residents.

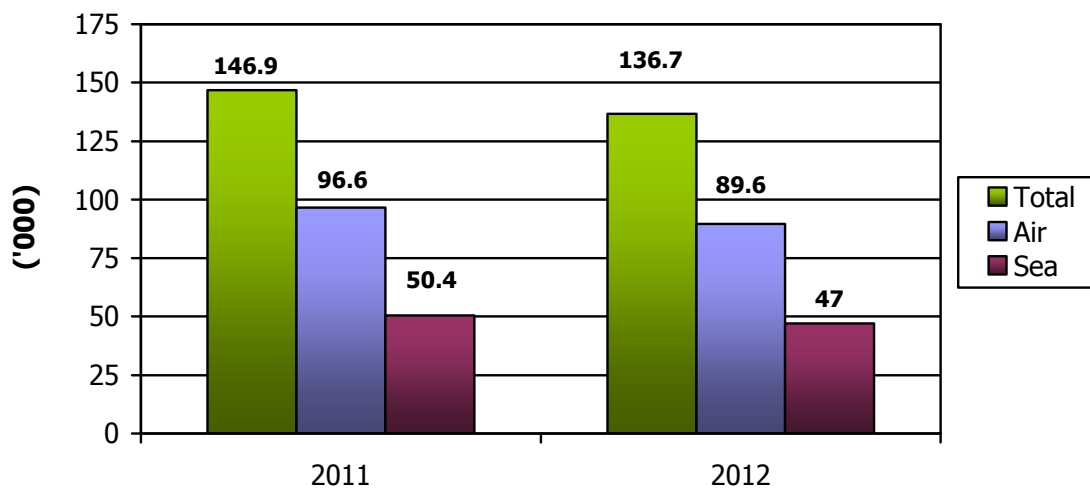
For sea passengers, 47,000 (64.9%) were departing visitors and 25,200 were departing residents.

Visitor Volumes by Travel Method Q2 2011 and 2012



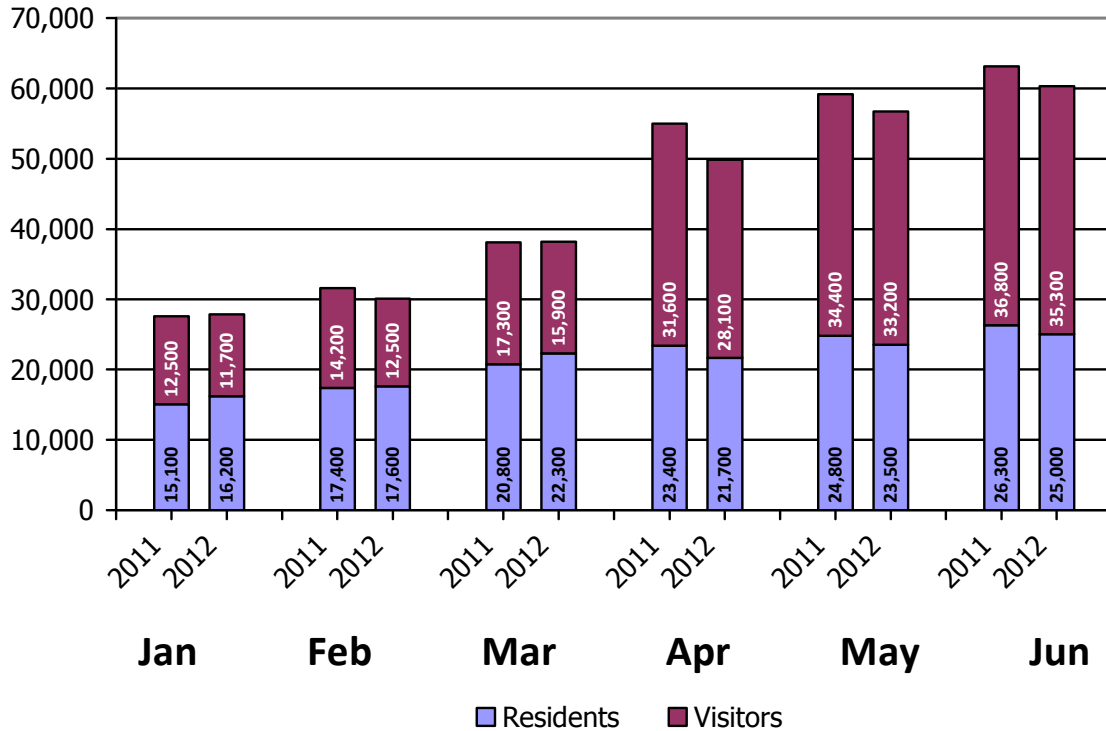
Compared to Quarter 2 2011, there has been a 4.2% decrease in visitors to Guernsey by air and a 8.5% decrease in visitors by sea.

January-June Visitor Volumes by Travel Method 2011 and 2012



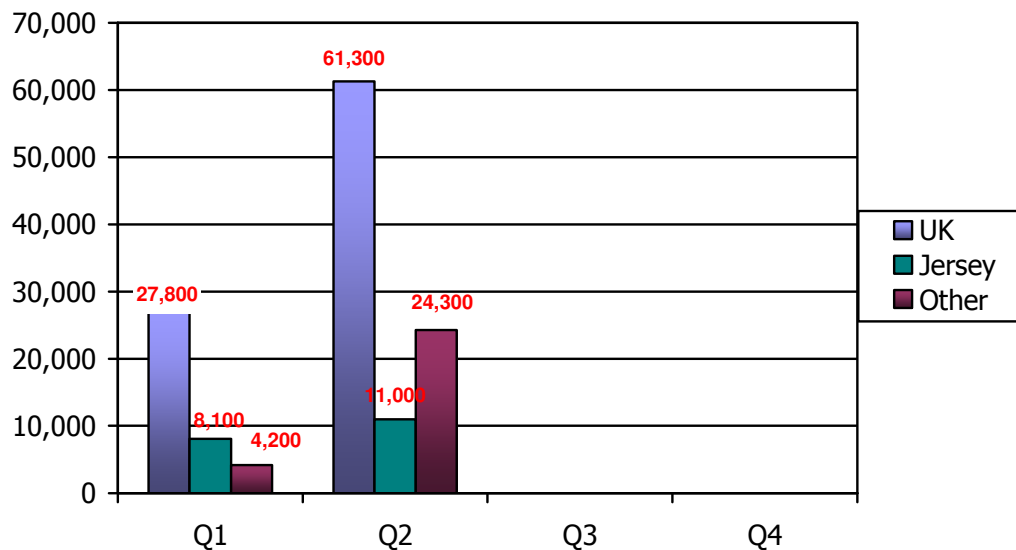
Compared to the first 6 months of 2011, there has been a 7.2% decrease in visitors to Guernsey by air and a 6.6% decrease in visitors by sea.

Visitor and Resident Departures by Month 2011 and 2012

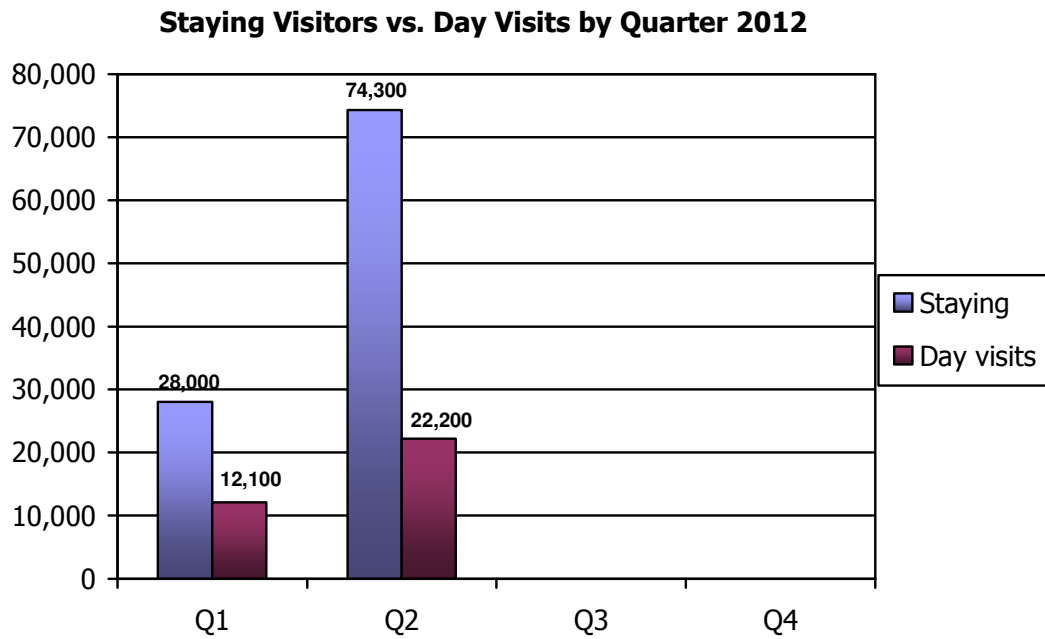


Visitor departures decreased by 6.9% in January, by 12.1% in February, by 8.2% in March, by 10.9% in April, by 3.7% in May and by 4.2% in June.

Visitor Country of Residence by Quarter 2012



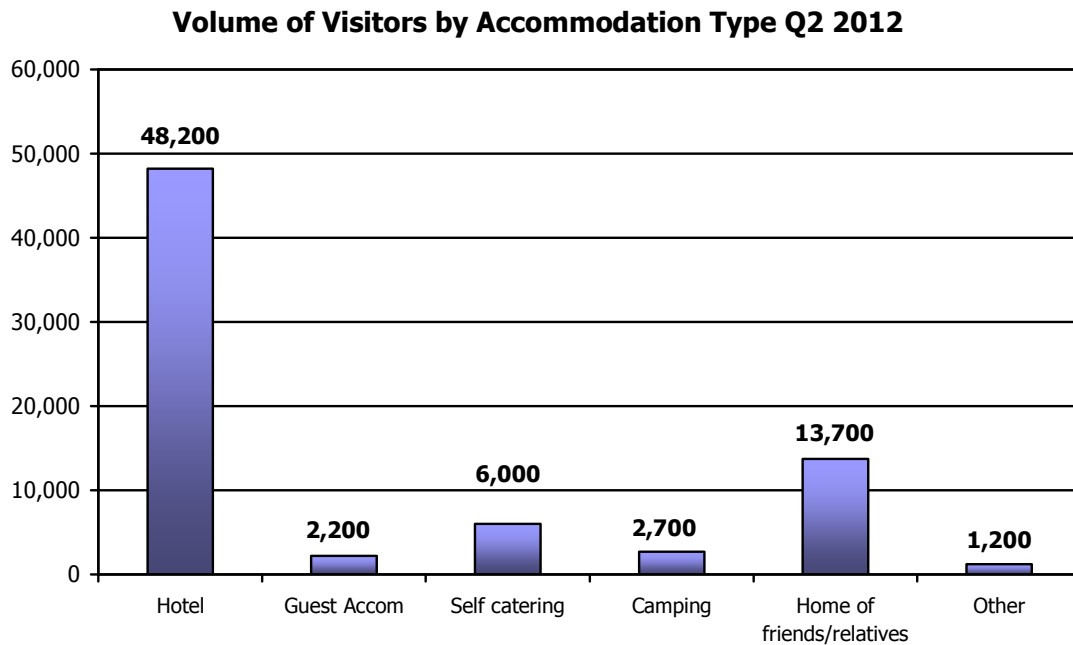
63.4% of visitors to Guernsey in Quarter 2 2012 were resident in the UK, with **11.4%** coming from Jersey and the remaining **25.2%** coming from other countries.



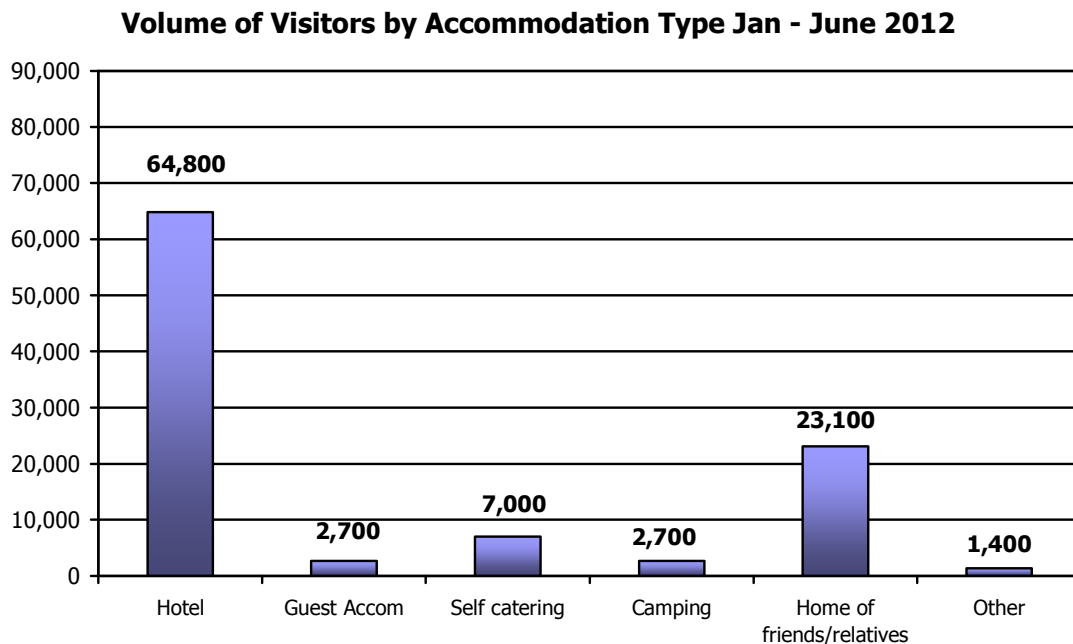
Compared to Quarter 2 2011, there has been a 5.8% decrease in visitors staying in Guernsey for at least 1 night, and a 7.0% decrease in day visits to Guernsey.

Cumulatively to the end of June, staying visitors have decreased by 8.5% compared to 2011, while day visits have decreased by 2.1%.

Accommodation used by Staying Visitors in Quarter 2 2012

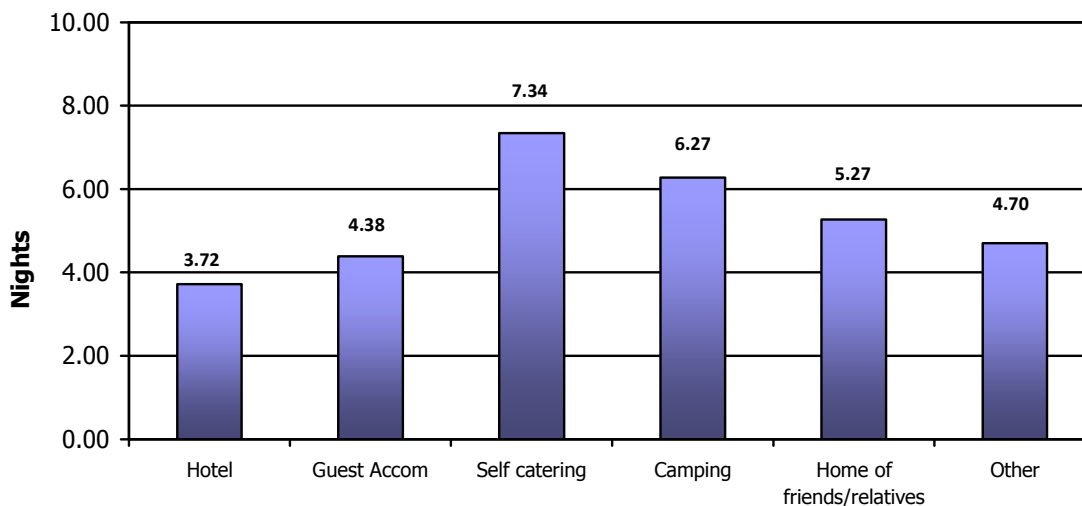


N.b. The above excludes long stay visitors (e.g. workers)



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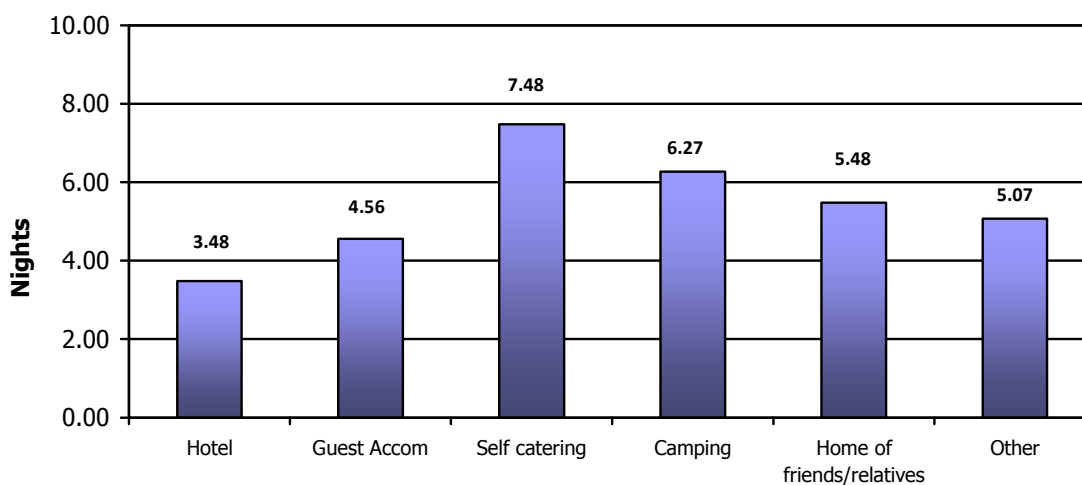
Average Length of Stay by Accommodation Type Q2 2012



In total, there were **327,700** overnight stays in Guernsey in Quarter 2 2012, with **250,000** bed nights sold in commercial accommodation. The full breakdown was as follows:

Hotel bed nights:	179,600
Guest accommodation:	9,500
Self catering:	44,200
Camping:	16,700
Staying with friends/relatives:	72,100
Other	5,600

Average Length of Stay by Accommodation Type Jan-Jun 2012



Over the first 6 months of 2012, there were **440,900** overnight stays in Guernsey, with 307,100 bed nights sold in commercial accommodation. The full breakdown was as follows:

Hotel bed nights:	225,500
Guest accommodation:	12,400
Self catering:	52,500
Camping:	16,700
Staying with friends/relatives:	126,400
Other	7,300

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, Island Ark has been running both the ongoing fieldwork and the analysis.

One major difference in approach from previous surveys was that from 2010 onwards, the survey also covered departing passengers on the air and sea routes to Alderney, Sark and Herm. Passengers on these routes have 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, although a separate breakdown of passengers on the Alderney, Sark and Herm routes is also now possible. It was also evident that the definition of holidaymakers and those visiting friends and relatives has differed between previous surveys and those conducted since 2010 (See 2012 definitions in the appendices).

The broad objectives of the 2012 Exit Survey are as follows:

- Determine the passenger composition of each of Guernsey's main air and sea transport routes across the whole of 2012
- 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 2012 quarterly report on passenger departures between January and June (Q1 and Q2 2012).

Methodology

As with previous exit surveys, face-to-face interviews are being conducted with departing passengers throughout 2012, 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, the Harbour passenger and car terminals and the inter-Island harbour departure points to cover the sailings to Sark and Herm.

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 2012, **351 interviewer hours** were allocated to this Passenger Calibration Survey. The exact shift schedules were flexible in order to account for 2012 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 and Q2 data therefore comes from **10,765 interviews, representing 21,118 departing passengers (8.0% of Guernsey's total departing passengers over Q1 and Q2 2012)** - 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 21,000 passengers provides a strong degree of statistical confidence in the results for the first half of 2012. 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.

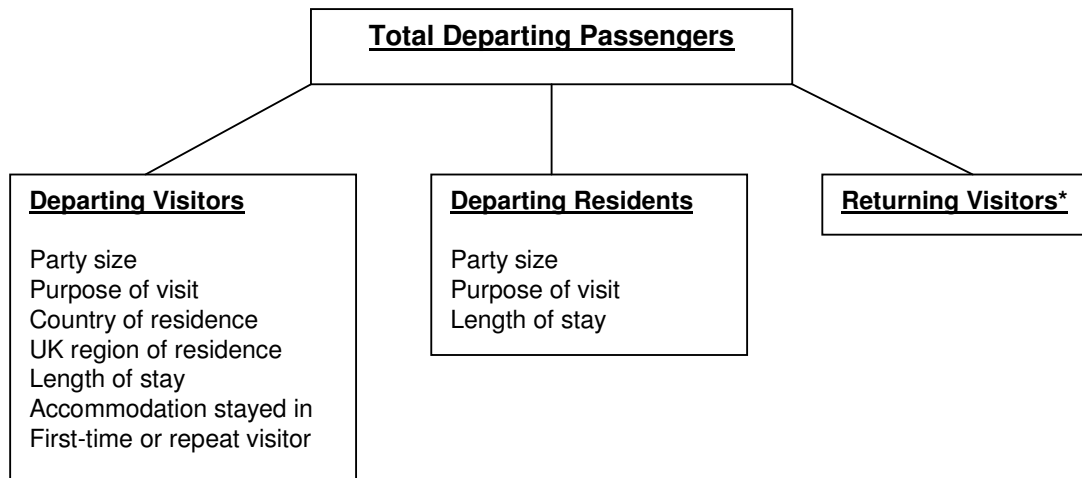
The detailed interview shifts were planned in advance, but there was flexibility in the schedules as detailed above. Interview shifts were planned to take account of the following:

- 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 2012, 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.

2012 Passenger Departures Including Alderney, Sark and Herm Departures

Cumulative Passenger Departures by Route January – June 2012 (including Alderney, Sark and Herm):

	<u>Volume</u>	<u>% of total pax.</u>	<u>2012 vs. 2011</u>
<u>Air</u>			
London Gatwick	80,300	25.6%	-2.9%
Southampton	30,700	9.8%	-2.6%
Manchester	14,000	4.5%	-6.0%
Birmingham	6,100	1.9%	-0.5%
East Midlands	6,000	1.9%	1.3%
Bristol	5,600	1.8%	8.3%
Exeter	5,200	1.7%	-0.8%
Stansted	4,900	1.6%	0.9%
Other UK Air	500	0.2%	-68.5%
Total UK Air	153,300	48.9%	-2.9%
Jersey	35,000	11.2%	-8.8%
Alderney	8,900	2.9%	-8.7%
Total CI Air	44,000	14%	-8.8%
Dinard	1,300	0.4%	-18.7%
Swiss Air	100	0%	-82.3%
Other Foreign Air	1,600	0.5%	-5.2%
Total Foreign Air	3,000	1.0%	-22.6%
Total Air:	200,300	64.0%	-4.7%
<u>Sea</u>			
UK Sea	31,400	10.0%	-2.4%
Jersey	22,100	7.1%	8.4%
Herm	21,500	6.9%	-30.5%
Sark	19,000	6.1%	-8.6%
St. Malo	15,400	4.9%	-14.3%
Other French Sea	3,600	1.1%	-19.7%
Alderney	0	0%	0%
Total Sea:	112,900	36.0%	-11.0%
Total Departures:	313,200		-7.1%

2012 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".

Fieldwork, Interviewers and Quality Control Standards

As a member 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 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.

Island Ark Ltd.

Floor One
Liberation Station
St. Helier
Jersey JE2 3AS

Telephone: 01534 719751
Email: julian@island-ark.com
Website: www.island-ark.com