

2016 Travel Survey

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

RESEARCH REPORT ON Q3 2016

October 26th 2016

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Summary of Results for Q3

	<u>2015</u>	<u>2016</u>	<u>% change</u>
Total departing passengers	202,400	193,600	-4.4%
Total departing visitors	121,100	115,300	-4.8%
Departing visitors by air	66,850	70,300	+5.1%
Departing visitors by sea	54,250	45,000	-17.0%
Staying leisure visitors	61,600	63,950	+3.8%
Visiting friends and relatives	23,300	20,700	-11.2%
Staying business / conference	8,100	7,200	-10.7%
Leisure day visits	13,100	9,400	-28.1%
Business day visits	2,400	3,100	+31.9%
Total for the above purposes of visit *	108,450	104,400	-3.7%
Total staying visitors	93,800	96,100	+2.4%
Average length of stay **	5.50 nights	5.41 nights	-1.6%
Total overnight stays (bed nights) **	512,850	515,500	+0.5%
Total staying in commercial accommodation	71,350	73,700	+3.3%
Average stay in commercial accommodation	5.18 nights	5.09 nights	-1.7%
Bed nights in commercial accommodation	369,600	375,500	+1.6%
Day visits	27,250	19,200	-29.5%
UK visitors	88,800	82,850	-6.7%
Jersey visitors	8,800	6,000	-31.6%
Other nationalities	23,500	26,400	+12.3%
Cruise ship passengers ***	60,930	67,880	+11.4%
Visiting yachtsmen ***	13,500	10,580	-21.6%
Departing Guernsey residents	81,200	77,700	-4.3%
Departing residents by air	55,500	50,500	-8.9%
Departing residents by sea	25,700	27,200	+5.6%
Net Promoter Score	56%	57%	

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

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

**** Excludes "Long stay" visitors.**

***** Cruise passengers and visiting yachtsmen are in addition to the Total Departing Passengers shown at the top of the page which only include passengers departing through the Airport and Harbour passenger terminals.**

Summary of Results – January to September

	<u>2015</u>	<u>2016</u>	<u>% change</u>
Total departing passengers	468,900	443,700	-5.4%
Total departing visitors	249,700	231,400	-7.3%
Departing visitors by air	149,700	150,800	+0.7%
Departing visitors by sea	100,000	80,600	-19.4%
Staying leisure visitors	116,000	113,250	-2.4%
Visiting friends and relatives	51,950	44,700	-13.9%
Staying business / conference	25,150	22,200	-11.8%
Leisure day visits	23,300	19,200	-17.6%
Business day visits	10,000	10,300	+2.9%
Total for the above purposes of visit *	226,350	209,600	-7.4%
Total staying visitors	195,800	188,900	-3.5%
Average length of stay **	4.98 nights	4.85 nights	-2.6%
Total overnight stays (bed nights) **	969,000	907,900	-6.3%
Total staying in commercial accommodation	147,500	142,000	-3.7%
Average stay in commercial accommodation	4.62 nights	4.53 nights	-1.9%
Bed nights in commercial accommodation	680,750	644,000	-5.4%
Day visits	53,900	42,500	-21.1%
UK visitors	180,600	162,200	-10.2%
Jersey visitors	23,100	18,900	-18.2%
Other nationalities	46,000	50,250	+9.3%
Cruise ship passengers ***	120,560	132,850	+10.2%
Visiting yachtsmen ***	19,150	16,330	-14.7%
Departing Guernsey residents	218,700	211,100	-3.5%
Departing residents by air	162,200	159,050	-2.0%
Departing residents by sea	56,400	52,000	-7.8%
Net Promoter Score	55%	52%	

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

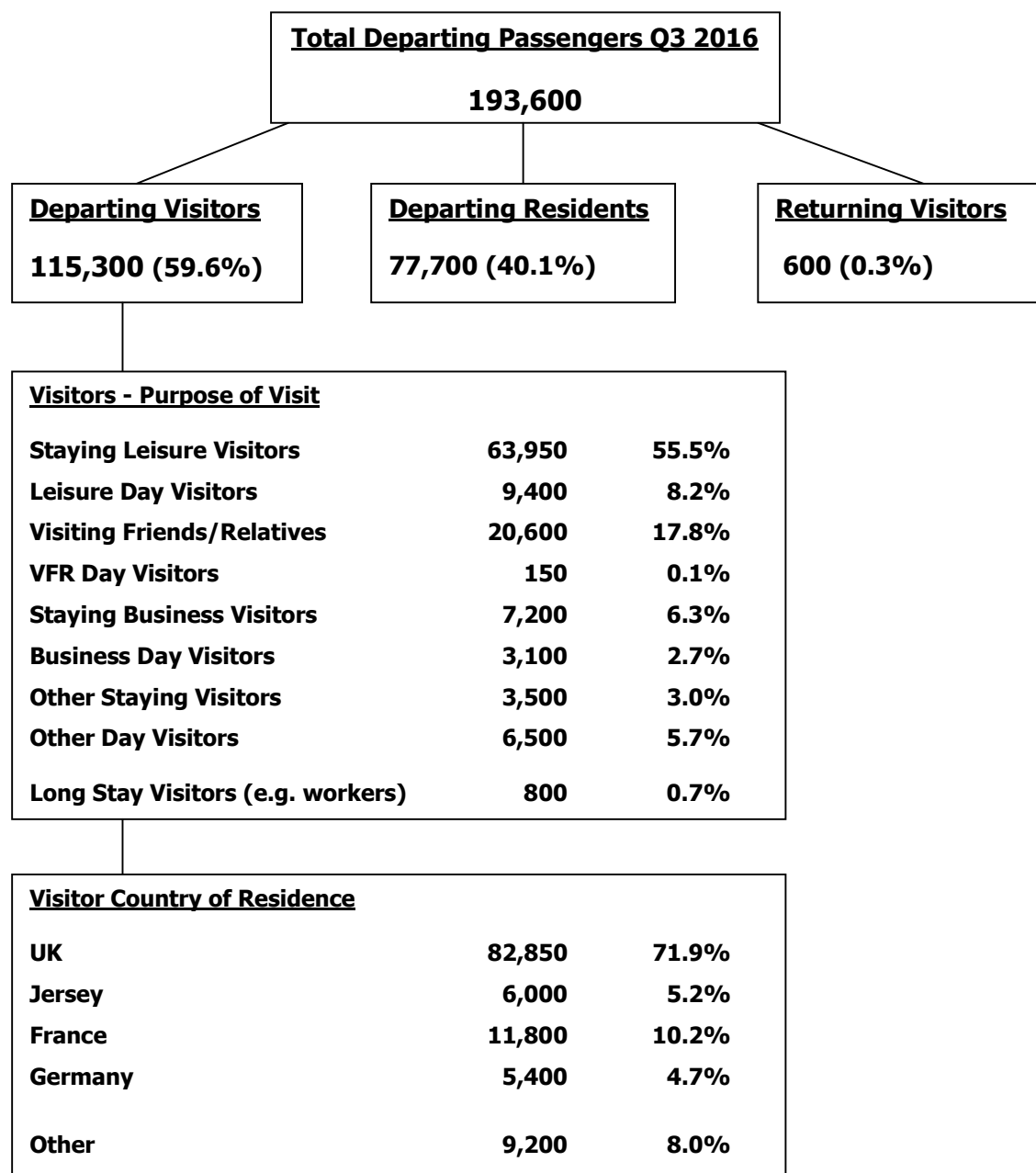
*** These figures exclude "Other staying", "Other day" and "Long stay" visitors as shown in the breakdown on page 2 and as defined in the appendices.**

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Q3 Survey Results – Excluding Alderney, Sark and Herm Departures

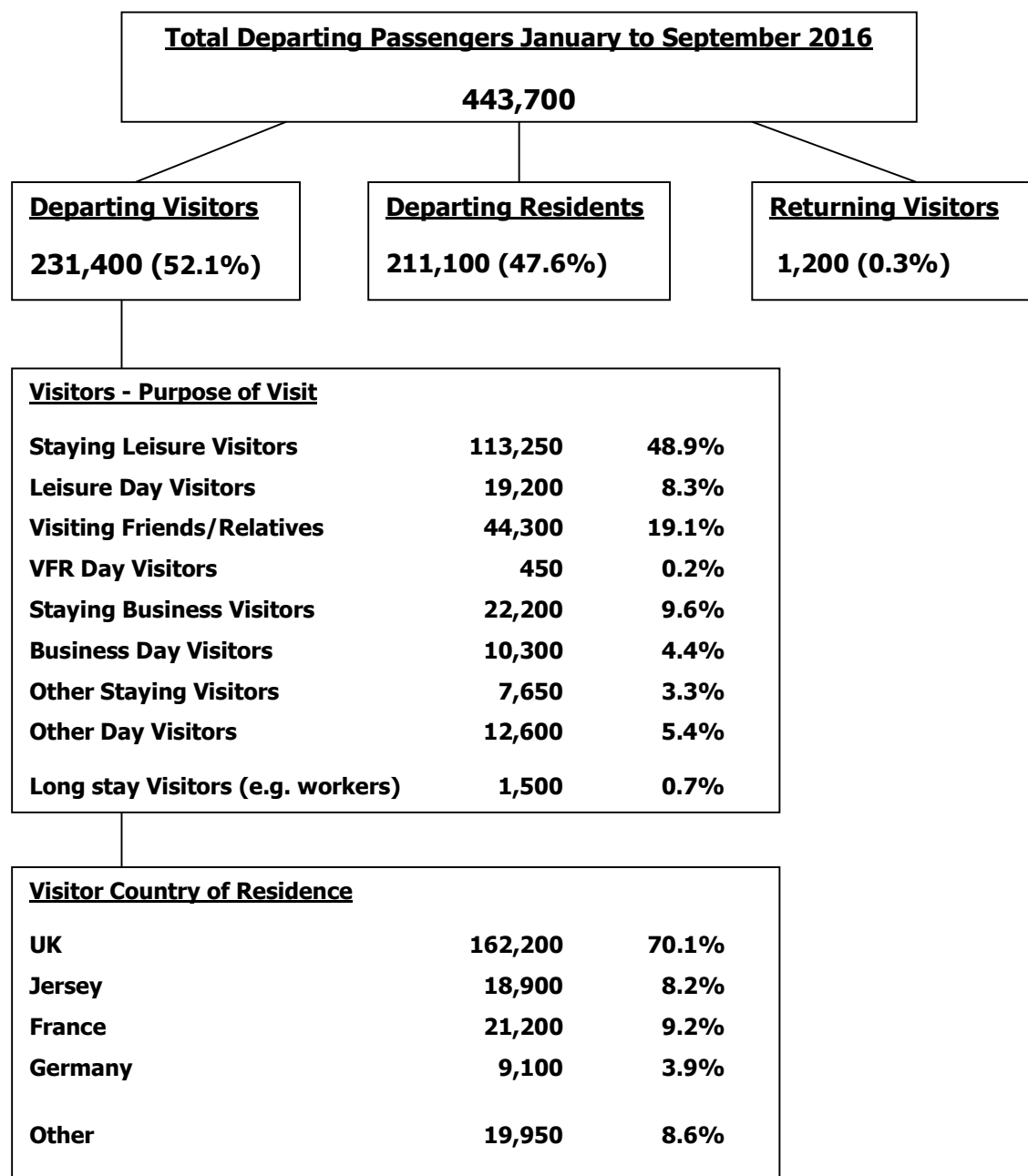
Excluding the Alderney, Sark and Herm routes, the passenger numbers for the **third quarter** of 2016 were broken down as follows:



In addition to the above, there were **67,880 passengers on cruise ships** and **10,580 visiting yachtsmen** arriving in Guernsey over the period July to September.

Cumulative Survey Results – January to September

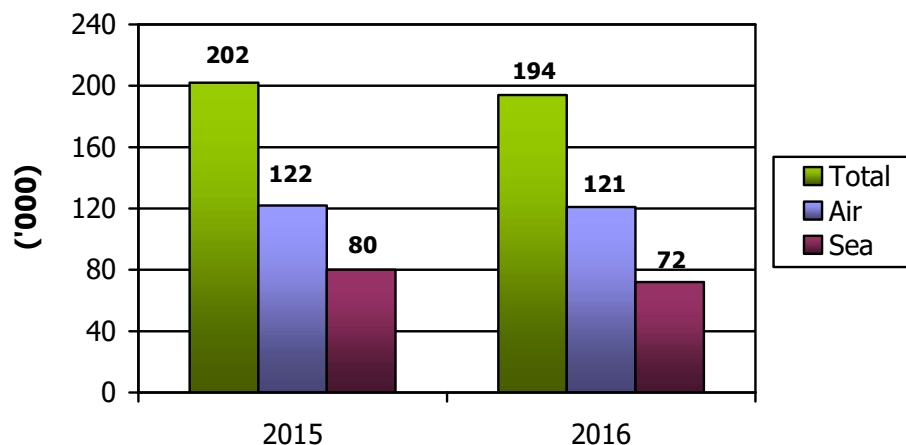
Excluding the Alderney, Sark and Herms routes, the passenger numbers for the **first, second and third quarters** of 2016 were broken down as follows:



In addition to the above, there have been **132,850 passengers on cruise ships** and **16,330 visiting yachtsmen** arriving in Guernsey up to the end of September.

Comparisons with 2015

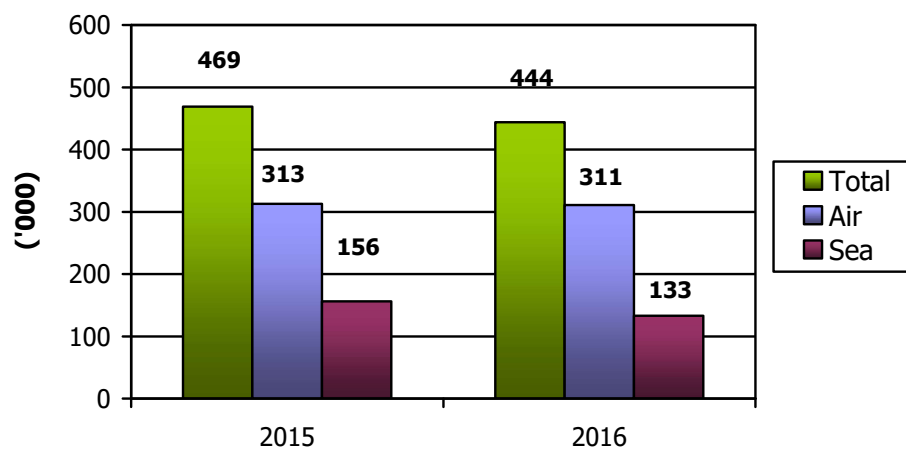
Passenger Departures Q3 2015 and 2016



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

Compared to Quarter 3 2015, there has been a 4.4% decrease in passenger departures from Guernsey, with a 1.0% decrease in passenger departures by air and a 9.5% decrease in passenger departures by sea.

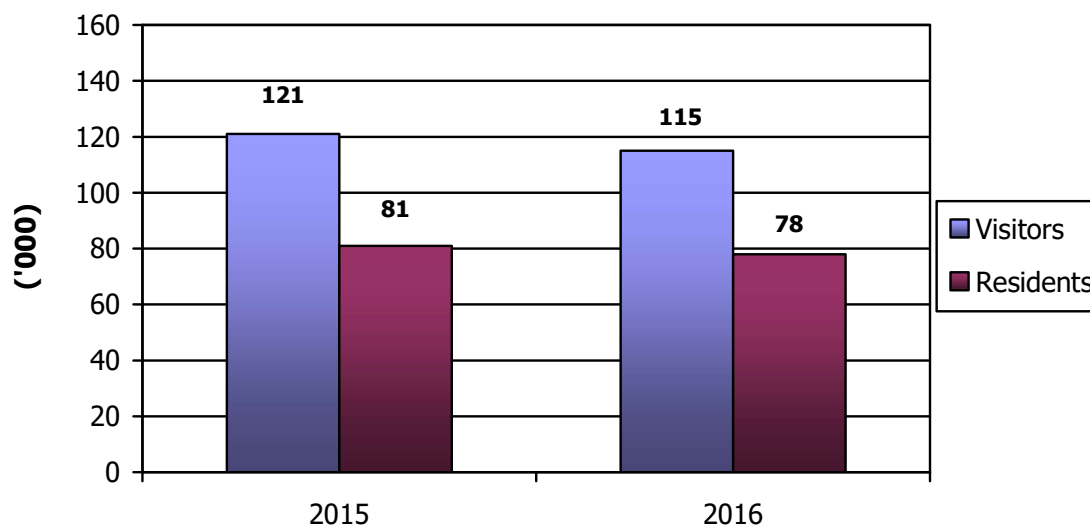
Passenger Departures January to September 2015 and 2016



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

Compared to the first 9 months of 2015, there has been a 5.4% decrease in passenger departures from Guernsey, with a 0.5% decrease in passenger departures by air and a 15.1% decrease in passenger departures by sea.

Visitors vs. Residents Q3 2015 and 2016



Excluding travel from within the Bailiwick, there were **115,300 visitor departures** between July and September 2016 and **77,700 resident departures**.

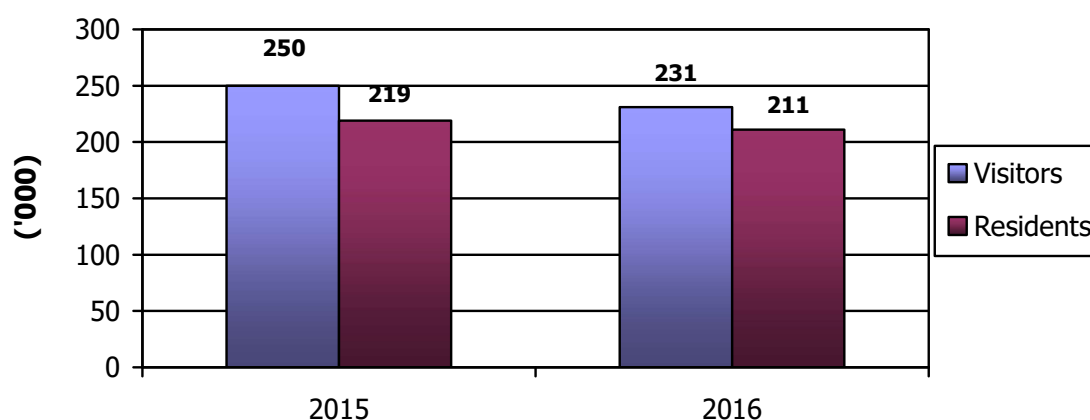
Visitor departures have **decreased overall by 4.8%** compared to Quarter 3 2015.

Excluding "returning visitors", 59.7% of departing passengers in Quarter 3 2016 were visitors to Guernsey, compared to 59.8% over the same period in 2015.

For air passengers, 70,300 (58.0%) were departing visitors and 50,500 were departing residents.

For sea passengers, 45,000 (62.2%) were departing visitors and 27,200 were departing residents.

Visitors vs. Residents January to September 2015 and 2016



Excluding travel from within the Bailiwick, there were **231,400 visitor departures** between January and September 2016 and **211,100 resident departures**.

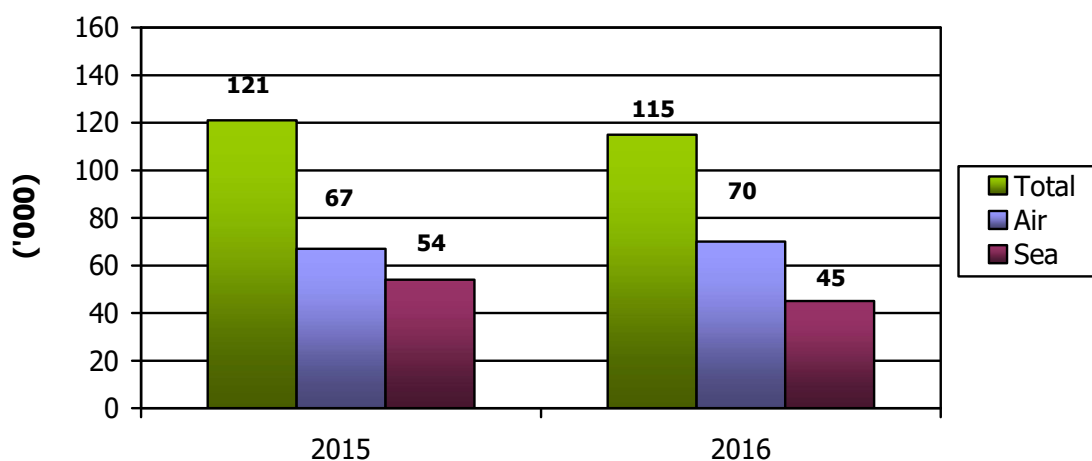
Visitor departures have **decreased overall by 7.3%** compared to the same period in 2015.

Excluding the 1,200 "returning visitors", 52.2% of departing passengers over the first 9 months of 2016 were visitors to Guernsey, compared to 53.2% over the same period in 2015.

For air passengers, 150,800 (48.5%) were departing visitors and 159,000 were departing residents.

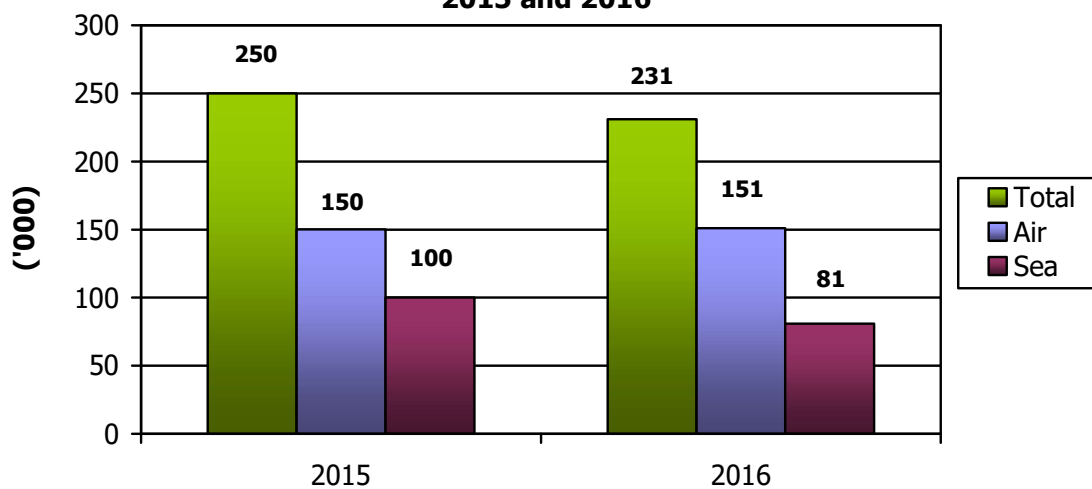
For sea passengers, 80,600 (60.7%) were departing visitors and 52,000 were departing residents.

Visitor Volumes by Travel Method Q3 2015 and 2016



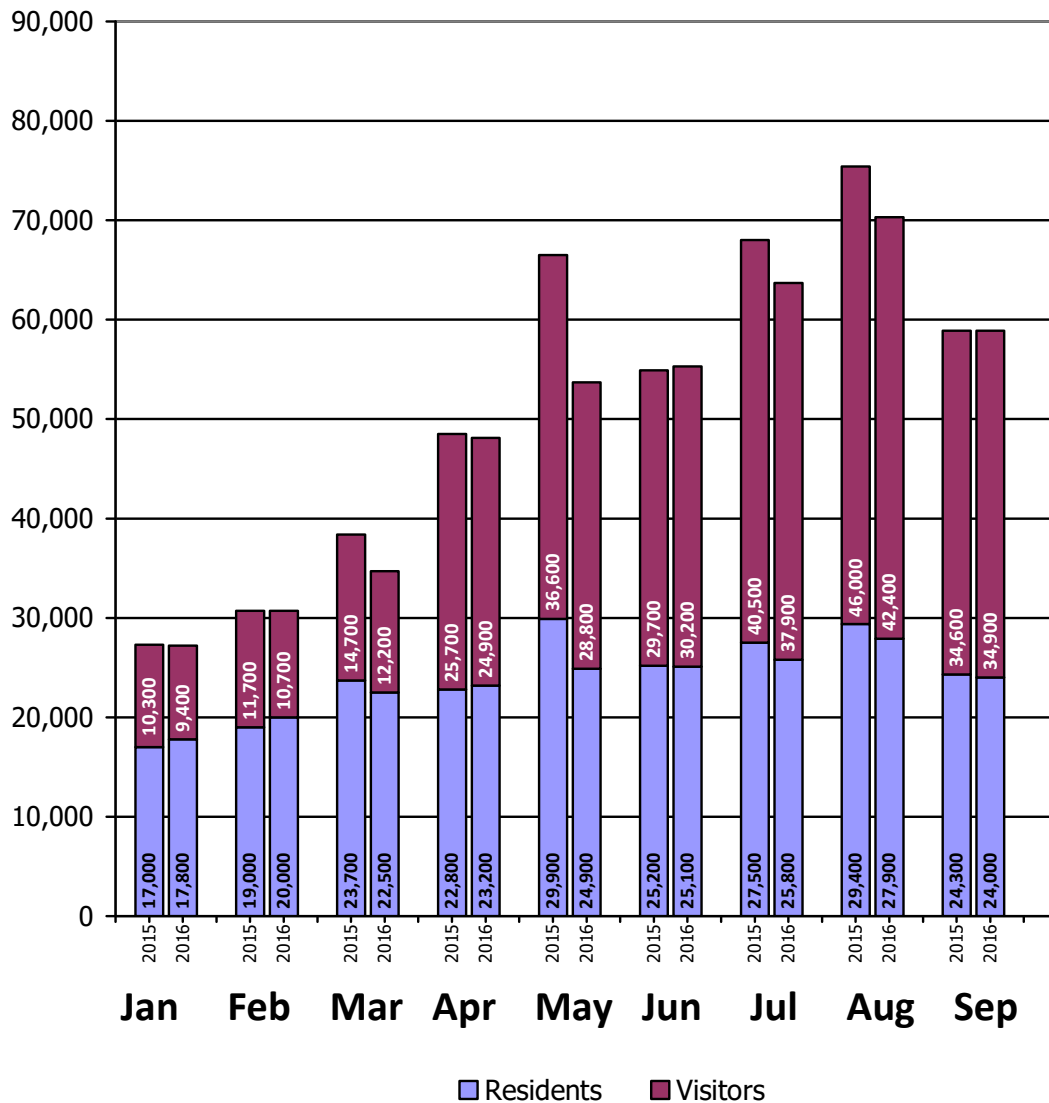
Compared to Quarter 3 2015, there has been a 5.1% increase in visitors to Guernsey by air and a 17.0% decrease in visitors by sea.

January-September Visitor Volumes by Travel Method 2015 and 2016



Compared to the first 9 months of 2015, there has been a 0.7% increase in visitors to Guernsey by air and an 19.4% decrease in visitors by sea.

Visitor and Resident Departures by Month 2015 and 2016



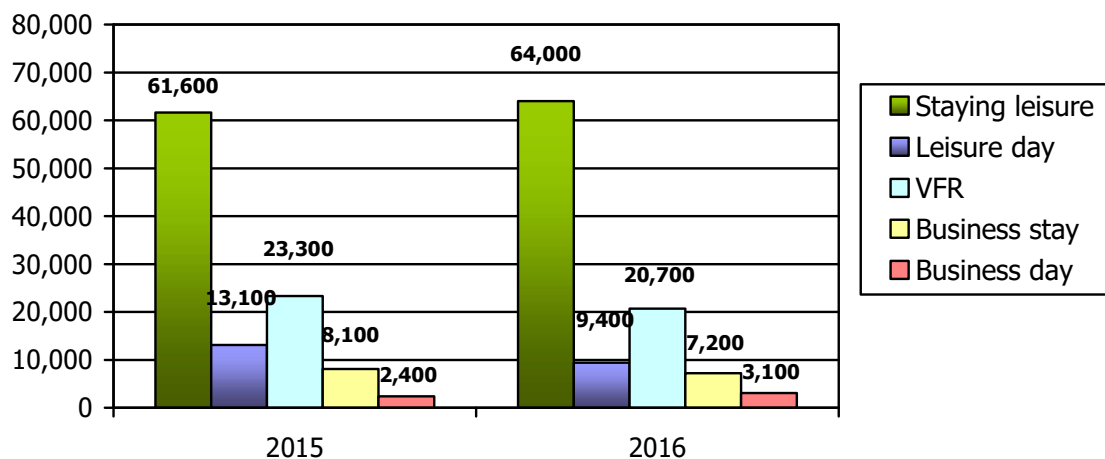
Over Q1, visitor departures decreased by 8.7% in January, by 9.1% in February and by 16.8% in March.

Over Q2, visitor departures decreased by 3.0% in April and by 21.3% in May and increased by 1.9% in June.

Over Q3, visitor departures decreased by 6.2% in July and by 7.7% in August, and increased by 0.8% in September.

Visitors by Purpose of Visit and Travel Method

Visitor Volumes by Visit Purpose Q3 2015 and 2016



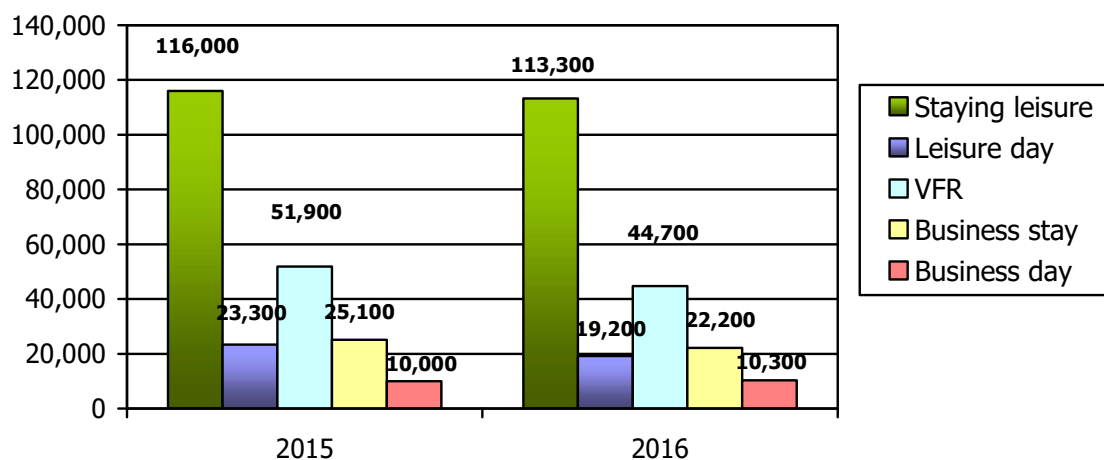
Compared to Quarter 3 2015, there has been a 3.8% increase in those staying in Guernsey for leisure purposes and a 31.9% increase in business day visits. Leisure day visits have fallen by 28.1%, those visiting friends and relatives have fallen by 11.2% and staying business visitors have fallen by 10.7%.

Breakdown by air and sea – Q3 2015 vs. Q3 2016:

	<u>Air</u>			<u>Sea</u>		
	2015	2016	% change	2015	2016	% change
Staying Leisure Visitors	33,800	37,180	10.0%	27,790	26,770	-3.7%
Leisure Day visits	1,020	1,030	0.6%	12,060	8,390	-30.5%
Staying VFR	18,470	17,330	-6.2%	4,340	3,240	-25.3%
VFR Day visits	110	80	-29.2%	410	60	-85.0%
Staying Business	5,530	5,660	2.3%	2,550	1,550	-39.0%
Business Day visits	2,040	2,940	43.9%	340	200	-41.1%

Cumulative figures 2015 vs. 2016:

Visitor Volumes by Visit Purpose January to September 2015 and 2016

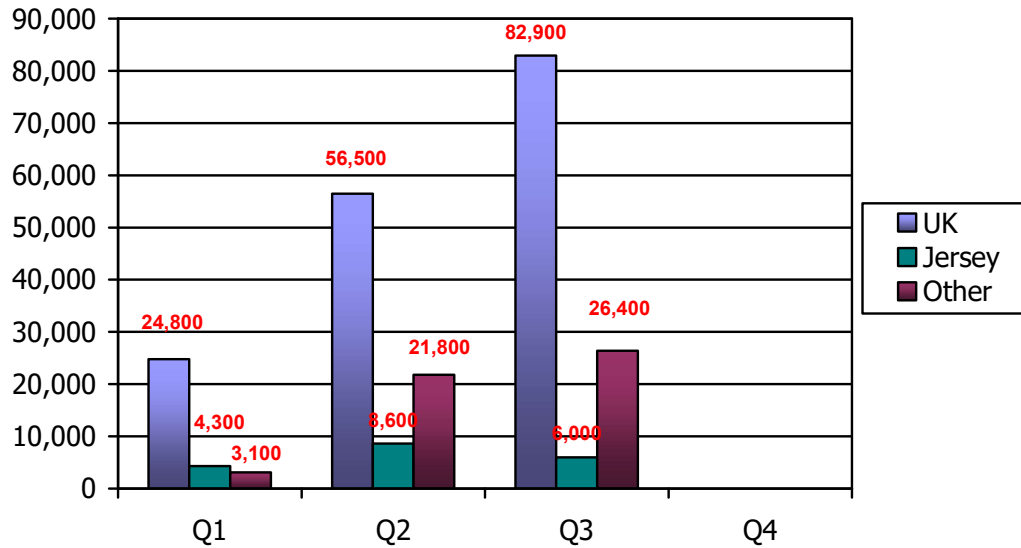


Compared to the first 9 months of 2015, there has been a 2.9%% increase in business day visits. Staying leisure visitors have fallen by 2.4%, leisure day visits have fallen by 17.6%, those visiting friends and relatives have fallen by 13.9%, and staying business visitors have fallen by 11.8%.

Breakdown by air and sea to the end of September 2015 vs. 2016:

	<u>Air</u>			<u>Sea</u>		
	2015	2016	% change	2015	2016	% change
Staying Leisure Visitors	66,600	68,470	2.8%	49,380	44,780	-9.3%
Leisure Day visits	2,380	2,440	2.2%	20,900	16,740	-19.9%
Staying VFR	41,420	38,190	-7.8%	9,510	6,080	-36.0%
VFR Day visits	430	310	-27.2%	600	140	-77.5%
Staying Business	19,160	18,720	-2.3%	5,990	3,450	-42.3%
Business Day visits	9,110	9,730	+6.9%	880	550	-37.7%

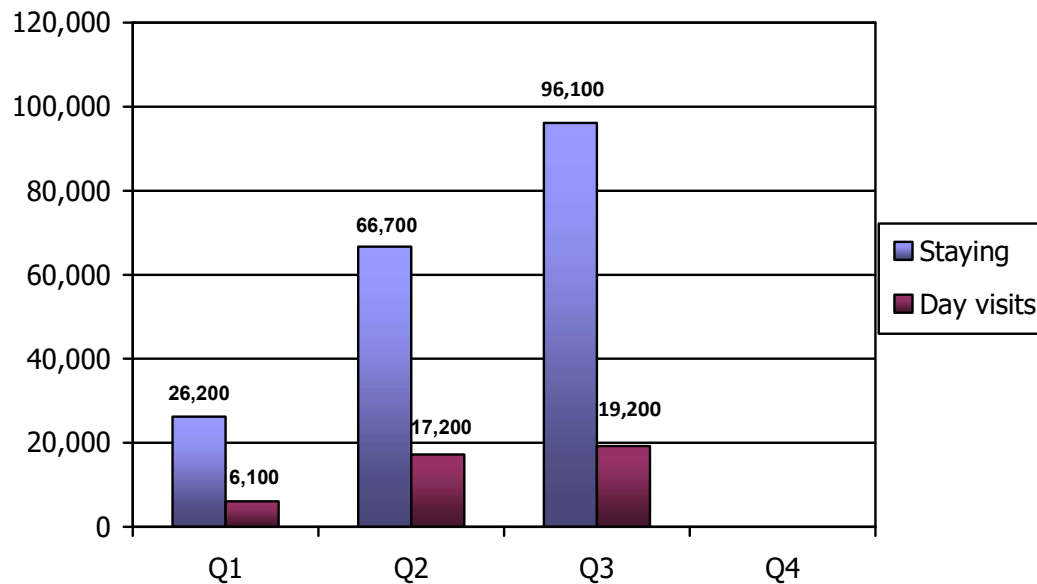
Visitor Country of Residence by Quarter 2016



71.9% of visitors to Guernsey in Quarter 3 2016 were resident in the UK, with **5.2%** coming from Jersey and the remaining **22.9%** coming from other countries.

Up to the end of September, the number of UK visitors has decreased by 10.2% while the number of visitors from Jersey has decreased by 18.2% and the number of visitors from other markets has increased by 9.3%.

Staying Visitors vs. Day Visits by Quarter 2016

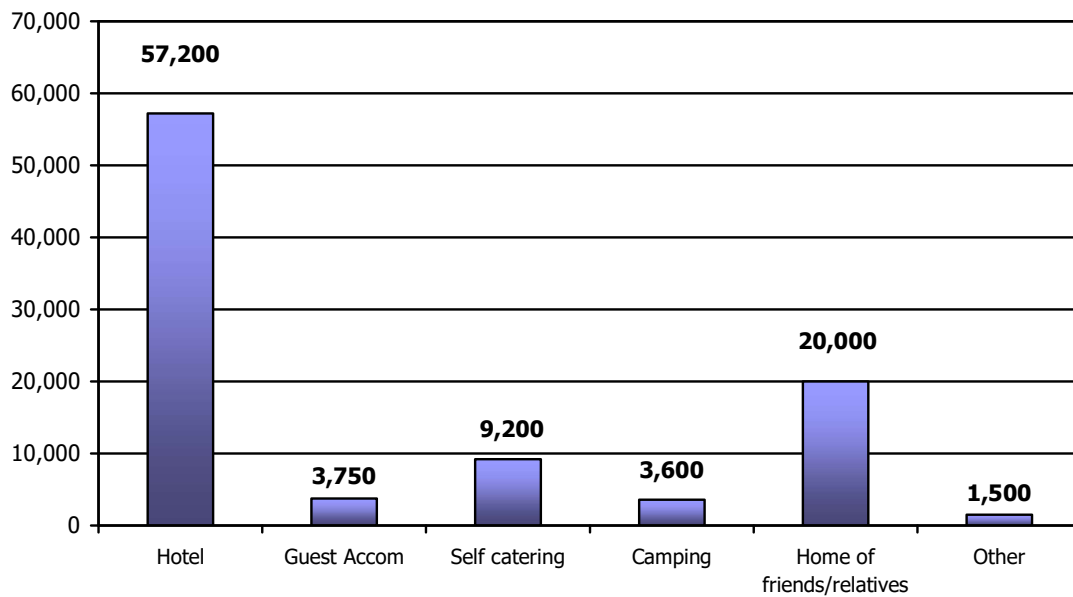


Compared to Quarter 3 2015, there has been a 2.4% increase in visitors staying in Guernsey for at least 1 night, and a 29.5% decrease in day visits to Guernsey.

Cumulatively to the end of September, staying visitors have decreased by 3.5% compared to 2015, while day visits have decreased by 21.1%.

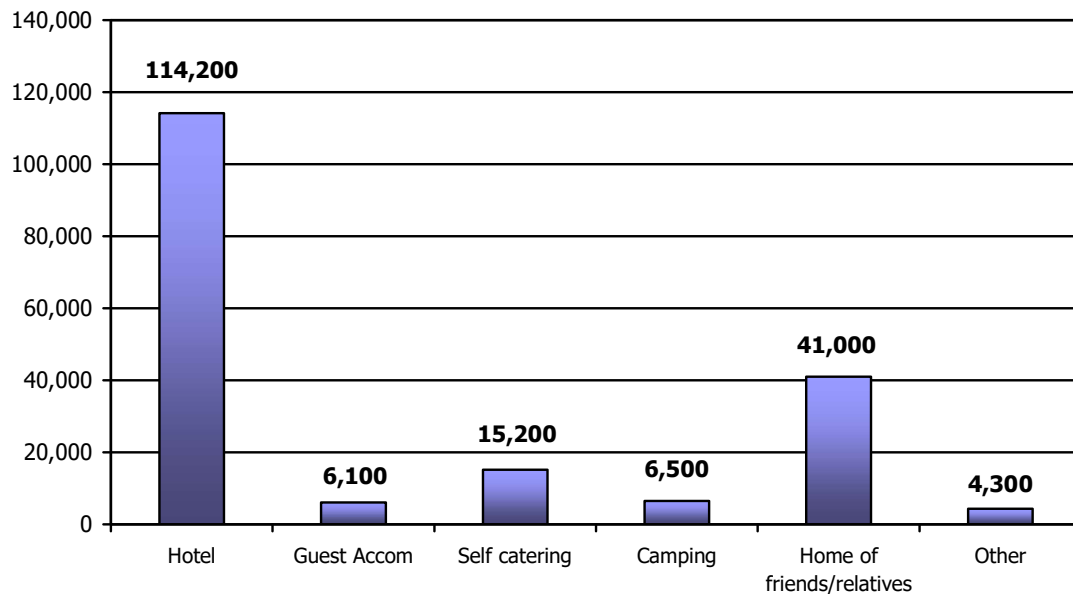
Accommodation used by Staying Visitors in Quarter 3 2016

Volume of Visitors by Accommodation Type Q3 2016



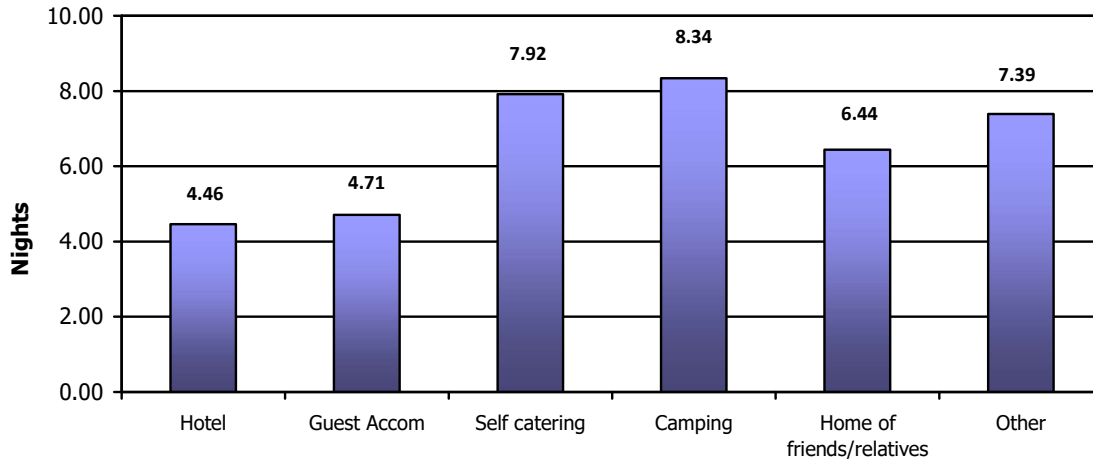
N.b. The above excludes long stay visitors (e.g. workers)

Visitors by Accommodation Type January to September 2016



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

Average Length of Stay by Accommodation Type Q3 2016



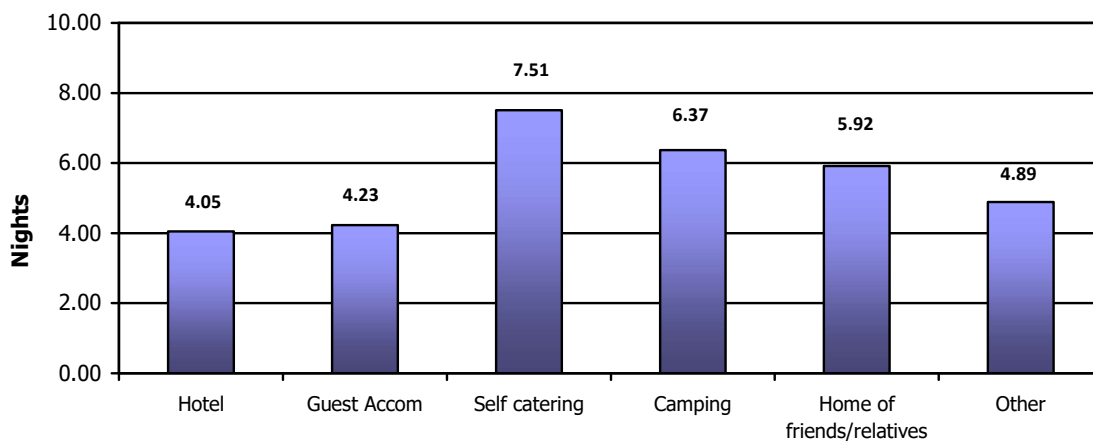
In total, there were **515,500** overnight stays in Guernsey in Quarter 3 2016 (+0.5%), with **375,500** bed nights sold in commercial accommodation (+1.6%).

The full breakdown was as follows:

Hotel bed nights:	255,000
Guest accommodation:	17,650
Self catering:	73,100
Camping:	29,800
Staying with friends/relatives:	129,000
Other	11,000

The overall average stay in Q3 for those spending at least a night in Guernsey was 5.41 nights, down from 5.50 nights in Q3 2015.

Average Length of Stay by Accommodation Type Jan to Sep 2016



Over the first 9 months of 2016, there were **907,900** overnight stays in Guernsey (-6.3%), with 644,000 bed nights sold in commercial accommodation (-5.4%).

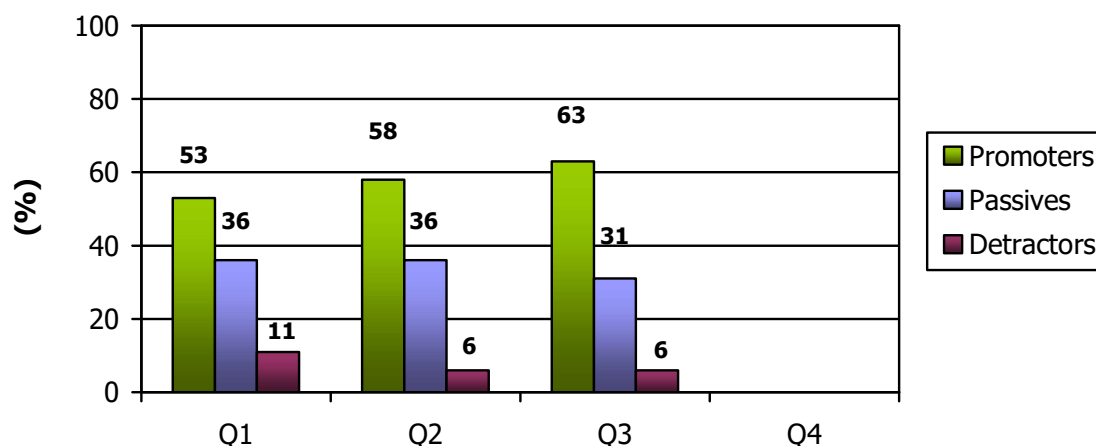
The full breakdown was as follows:

Hotel bed nights:	462,400
Guest accommodation:	26,000
Self catering:	114,100
Camping:	41,600
Staying with friends/relatives:	242,900
Other	21,000

Recommendation of Guernsey to friends or family

Departing visitors are asked how likely, on a scale of 0 to 10, they would be to recommend Guernsey to friends or family.

Likelihood to promote Guernsey by Quarter 2016



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

The overall average score in Q1 2016 was 8.41, with the Net Promoter Score being 41.9.

The overall average score in Q2 2016 was 8.72, with the Net Promoter Score being 51.5.

The overall average score in Q3 2016 was 8.84, with the Net Promoter Score being 56.9.

The overall average up to September 2016 was 8.72, with the Net Promoter Score being 52.4.

The Q3 results broken down by purpose of visit were as follows:

	<u>Average Score</u>	<u>Net Promoter Score</u>
Overall	8.84	56.9
Staying leisure visitors	9.07	66.8
Leisure day visitors	8.25	36.5
Staying VFR	9.12	67.9
Staying business visitors	8.40	36.2
Business day visitors	7.93	19.0

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

	<u>Average Score</u>	<u>Net Promoter Score</u>
Overall	8.72	52.4
Staying leisure visitors	8.99	63.3
Leisure day visitors	8.23	33.3
Staying VFR	8.99	63.1
Staying business visitors	8.42	39.3
Business day visitors	8.04	24.0

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 July to September 2016, **22,600** (18.6%) of the 121,200 departing air passengers were flying to an onward final destination.

14,700 (29.1%) of the 50,500 Guernsey residents travelling by air were flying to an onward destination and **7,850** (11.2%) of the 70,300 visitors to Guernsey departing by air were flying to an onward destination.

The breakdown for Q3 by route was as follows:

	<u>Visitor departures</u>	<u>Visitors travelling onward</u>	<u>Resident departures</u>	<u>Residents travelling onward</u>
Gatwick	20,980	3,270	23,140	12,000
Southampton	11,340	1,760	8,050	930
Manchester	7,640	240	2,920	240
East Midlands	4,430	0	1,090	60
Birmingham	3,310	520	950	100
Bristol	3,340	90	1,150	20
Exeter	2,590	100	1,560	130
Stansted	3,870	300	1,380	500
London City	2,710	160	1,300	280
Other UK Air	2,460	0	430	80
TOTAL UK AIR	62,680	6,440	41,950	14,350
Jersey air	5,640	1,290	8,120	360
Foreign air	1,940	110	470	0
TOTAL AIR	70,260	7,850	50,540	14,710

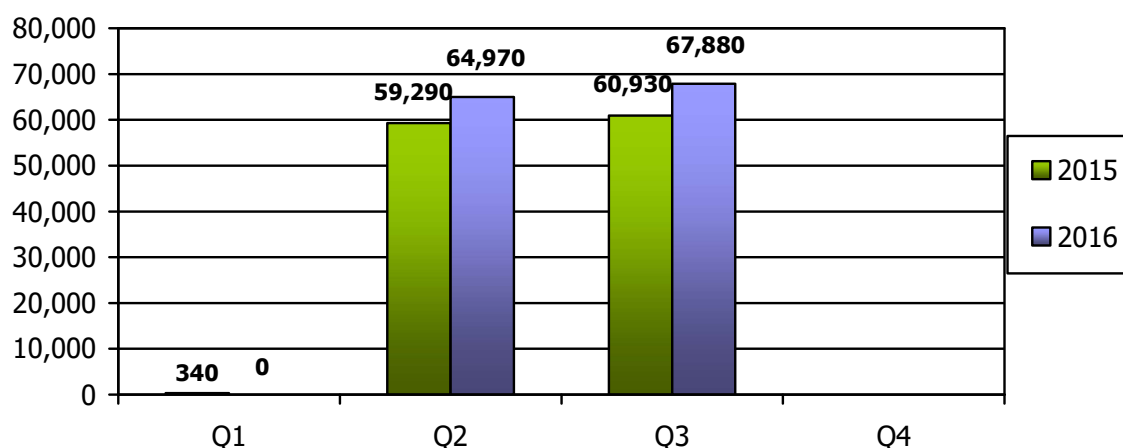
The main destinations/airports that passengers were travelling on to in Q3 were as follows:

1. Scottish airports	1,770 passengers	(1,290 visitors)
2. Italy	1,640 passengers	(130 visitors)
3. Spanish mainland	1,470 passengers	(210 visitors)
4. USA	1,190 passengers	(460 visitors)
5. Ireland	1,150 passengers	(510 visitors)
6. Portugal	1,000 passengers	(150 visitors)
7. Madeira	920 passengers	(60 visitors)
8. Germany	900 passengers	(770 visitors)
9. Greece & Islands	900 passengers	(10 visitors)
10. Switzerland	870 passengers	(630 visitors)
11. Netherlands	870 passengers	(660 visitors)
12. Balearic Islands	790 passengers	(20 visitors)
13. Canary Islands	780 passengers	(0 visitors)
14. Other English airports	770 passengers	(600 visitors)
15. France	710 passengers	(160 visitors)
16. Northern Ireland	680 passengers	(430 visitors)
17. Latvia	540 passengers	(200 visitors)
18. Canada	470 passengers	(150 visitors)
19. Croatia	440 passengers	(0 visitors)
20. Denmark	370 passengers	(250 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 2015 vs. 2016



Over Q3, the number of landed cruise passenger arrivals has increased by **11.4%** compared to Q3 2015 and the cumulative total to the end of September has increased by **10.2%**.

Over Q1 2016 there were no cruise ship arrivals compared to 1 cruise ship carrying 340 landed passengers in Q1 2015.

In April 2016, there were 10 cruise ships with a total of 13,130 landed passengers compared to 9 cruise ships with a total of 6,740 landed passengers in 2015.

In May 2016, there were 25 cruise ships with a total of 29,130 landed passengers compared to 27 cruise ships with a total of 28,840 landed passengers in 2015.

In June 2016, there were 16 cruise ships with a total of 22,710 landed passengers compared to 19 cruise ships with a total of 23,700 landed passengers in 2015.

In July 2016, there were 16 cruise ships with a total of 23,230 landed passengers compared to 16 cruise ships with a total of 23,680 landed passengers in 2015.

In August 2016, there were 19 cruise ships with a total of 31,420 landed passengers compared to 16 cruise ships with a total of 23,350 landed passengers in 2015.

In September 2016, there were 12 cruise ships with a total of 13,230 landed passengers compared to 15 cruise ships with a total of 13,900 landed passengers in 2015.

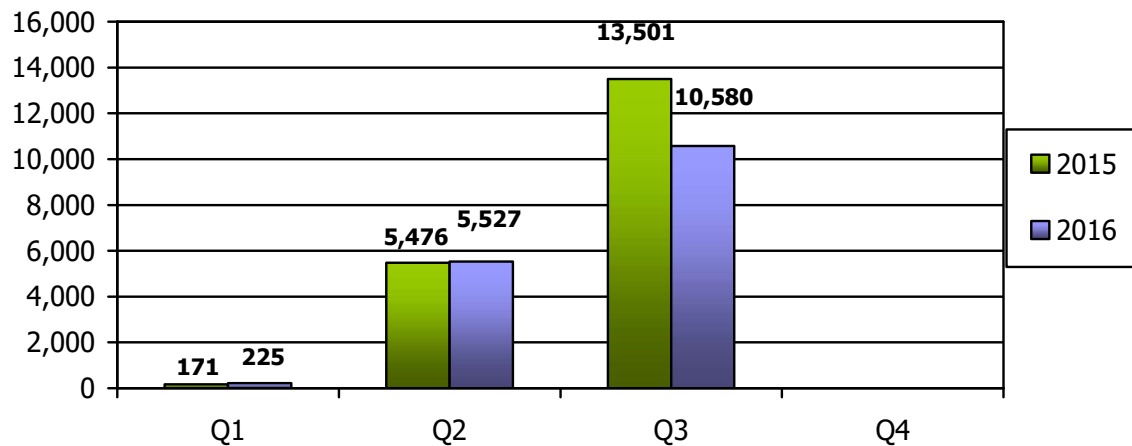
The survey also asks visitors who had visited Guernsey previously whether they had ever visited before on a cruise.

From the 3,162 respondents who answered this question over Q3 2016, 39 said that they had previously visited on a cruise. This represents **1.2 %** of previous visitors to Guernsey.

Passengers on pleasure craft (visiting yachts)

Guernsey Harbours collates information on the number of passengers on pleasure craft visiting Guernsey. The graph below shows a summary of the total number of pleasure craft passengers by quarter.

Visiting Yachtsmen by Quarter 2015 vs. 2016



Over Q3 2016, the number of pleasure passenger arrivals was **10,580 (-21.6%)** compared to 13,501 in Q3 2015.

Cumulatively to the end of September, the number of pleasure passenger arrivals has **decreased by 14.7% to 16,330**.

The main decreases have been in July (-26.5%) and August (-22.9%).

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, Guernsey Tourism, its marketing partners and other interested parties in allocating resources, planning and refining product development and marketing strategies, and acts as a benchmark to review future progress against marketing and strategic objectives.

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

One major difference in approach from previous surveys was that from 2010 to 2012 the survey also covered departing passengers on the air and sea routes to Alderney, Sark and Herm. Passengers on these routes had not been previously included in visitor or resident movements and have not been included subsequent to 2012. These routes have been excluded from this quarterly analysis. It is also evident that the definition of holidaymakers and those visiting friends and relatives has differed between previous surveys (See 2016 definitions in the appendices).

The broad objectives of the 2016 Exit Survey are as follows:

- Determine the passenger composition of each of Guernsey's main air and sea transport routes across the whole of 2016
- Consolidate this information in order to calculate visitor volumes broken down into different visitor segments
- Provide information on visitor purpose of visit, country and UK region of residence
- Provide information on resident purpose of visit away from Guernsey
- Provide basic profiling information for residents and visitors (length of stay, party size, accommodation stayed in, first-time or repeat visitor)

As well as a full-year report, the passenger numbers need to be broken down by month, and a more detailed quarterly report is also produced. This is the third 2016 quarterly report on passenger departures between July and September (Q3 2016).

Methodology

As with previous exit surveys, face-to-face interviews are being conducted with departing passengers throughout 2016, with interview shifts planned to reflect passenger throughput and to cover all routes, all days of the week and all times of the day.

It is very difficult to achieve a completely randomised approach when predetermining interview shifts, but the Passenger Calibration Survey uses a random sampling methodology as far as possible. Interview shifts are planned to broadly represent passenger movements throughout the year, but the selection of respondents within those shifts is random, with departing passengers being interviewed immediately after checking in at the Airport and Harbours, with the next passing person/car being selected for inclusion as soon as the

previous interview has finished. This provides a randomised approach to interviewee selection, while ensuring that interviewer time is used as productively as possible.

Interview shifts are undertaken at the Airport and the Harbour passenger and car terminals. In 2011 and 2012, interview shifts were also undertaken at the inter-Island harbour departure points to cover the sailings to Sark and Herm, but this was discontinued in 2013.

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

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

Interview shifts

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

Between July and September 2016, **446 interviewer hours** were allocated to this Passenger Calibration Survey. The exact shift schedules were flexible in order to account for 2016 transport schedules, any new routes, changes to schedules, and cancellations or delays. Although interview shifts are planned in advance, travel movements and weather conditions are continuously monitored and shifts have been altered as necessary.

Excluding the inter-Bailiwick routes, data for Q3 therefore comes from **8,045 interviews, representing 19,020 departing passengers (9.8% of Guernsey's total departing passengers, excluding the Alderney, Sark and Herm routes, over Q3 2016)** - making this a very comprehensive survey of departing passengers from Guernsey. Levels of statistical reliability for any individual route vary depending upon the sample sizes achieved for that route, but the cumulative sample size covering over 19,000 passengers provides a strong degree of statistical confidence in the results for Q3 2016. As sample sizes increase on some of the smaller routes, the cumulative data will become increasingly strengthened as the survey progresses and some of the data for earlier quarters will be updated.

The detailed interview shifts are planned in advance, but there is flexibility in the schedules as detailed above. Interview shifts are 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.

Research Results					
Sample Size	10% or 90%	20% or 80%	30% or 70%	40% or 60%	50%
8,000	+/- 0.7	+/- 0.9	+/- 1.0	+/- 1.1	+/- 1.1
4,900	+/- 0.8	+/- 1.1	+/- 1.3	+/- 1.4	+/- 1.4
1,000	+/- 1.9	+/- 2.5	+/- 2.8	+/- 3.0	+/- 3.1
500	+/- 2.6	+/- 3.5	+/- 4.0	+/- 4.3	+/- 4.4

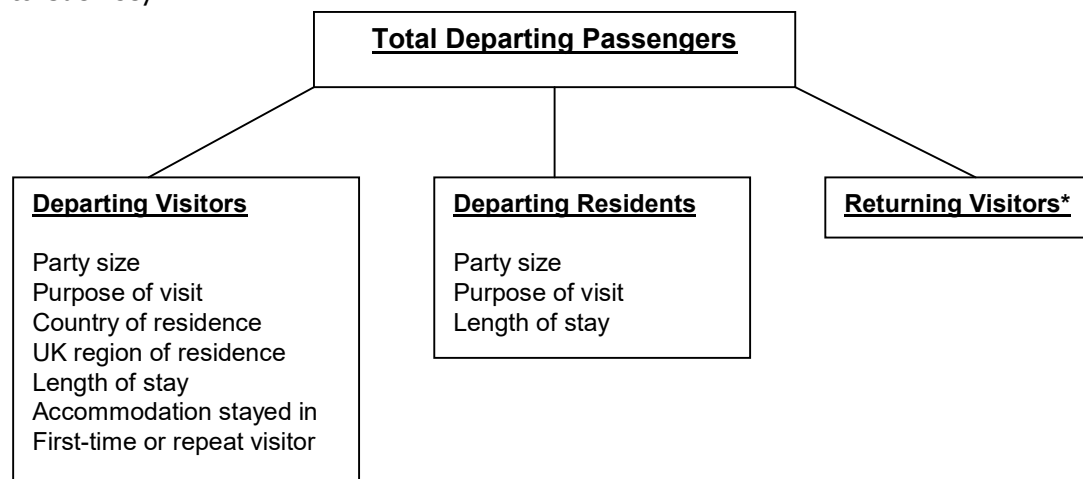
Based upon a total sample size from Q3 of 8,045, a finding that 59.6% of respondents were departing visitors would mean that the true figure for all respondents is 95% likely to be within the range 58.5% to 60.7%, but is more likely to be near the centre of this range (i.e. closer to the survey sample finding). For departing visitors, based upon a sub-sample size of 4,900, the finding that 55.5% were staying leisure visitors would have a statistical variation of between 54.1% and 56.9%. 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 **6.3%** in Q3 2016. This refusal rate compares very favourably with other similar surveys.

Survey outputs

The primary aim of the survey is to determine the breakdown of passengers on each route in order to determine the overall number of visitors to Guernsey by purpose of visit and country of residence. Some additional profiling questions are asked of visitors, and residents are also asked their purpose of visit and length of stay away from Guernsey.

The breakdown of passenger arrivals provides the following information for every major route to Guernsey:



***Returning visitors are those who are counted twice in passenger numbers because they visit elsewhere during their stay in Guernsey (e.g. visitor day trips to Jersey).**

The above breakdown of passengers will be provided for each major transport route to Guernsey in 2016, and is grossed up to show total air and total sea passenger breakdowns.

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

2016 Passenger Departures Including Alderney, Sark and Herm Departures

Cumulative Passenger Departures by Route January – September 2016 (including Alderney, Sark and Herm):

	<u>Volume</u>	<u>% of total pax.</u>	<u>2016 vs. 2015</u>
London Gatwick	116,520	20.1%	-2.1%
Southampton	53,220	9.2%	0.5%
Manchester	24,820	4.3%	-5.8%
East Midlands	11,580	2.0%	-7.6%
Birmingham	10,700	1.9%	-2.1%
London City	10,510	1.8%	19.8%
Stansted	10,300	1.8%	-3.2%
Exeter	10,120	1.7%	6.1%
Bristol	9,680	1.7%	2.6%
Other UK Air	4,130	0.7%	614.4%
Total UK Air	261,590	45.2%	0.3%
Jersey	44,090	7.6%	-7.0%
Alderney	13,420	2.3%	-5.1%
Total CI Air	57,510	9.9%	-6.5%
Dinard	1,040	0.2%	7.9%
Swiss Air	30	*	-75.7%
Other Foreign Air	4,100	0.7%	26.8%
Total Foreign Air	4,180	0.9%	19.3%
Total Air:	324,270	56.1%	-0.7%
UK Sea	56,510	9.8%	-14.8%
Jersey	33,640	5.8%	-28.4%
Herm	73,880	12.8%	12.4%
Sark	47,230	8.2%	3.9%
St. Malo	33,520	5.8%	-5.7%
Other French Sea	9,170	1.6%	21.1%
Alderney	150	*	143.6%
Total Sea:	254,110	43.9%	-5.1%
Total Departures:	578,380		-2.7%

2016 Definitions

Island Ark has used the purpose of visit definitions as declared by the visitor, irrespective of where they stayed: If they declare their main purpose of visit as "Leisure/Holiday", but say that they are staying with friends or relatives, their purpose remains as "Staying leisure/holiday". If they declare their main purpose of visit as "Seeing friends/family", but say that they are staying in commercial accommodation, their purpose remains as "Staying VFR".

From April 2016, the survey has adopted the common definition of a resident as "someone who lives in Guernsey or has been (or will be) resident in the Island for at least a year".

Prior to 2012, those stating that they were in transit and had not stayed in Guernsey were classified as "Leisure Daytrippers". From 2012 these have been reclassified as "Other Day Visits". "Other" purposes of visit would include those visiting Guernsey for other purposes that would not be considered as either leisure or business such as funerals, weddings, other family gatherings, deliveries, medical reasons, job interviews, study visits/school trips etc.

Fieldwork, Interviewers and Quality Control Standards

As a full member and company partner of the Market Research Society, Island Ark is required to provide best quality practice in all projects undertaken and to adhere to the guidelines set out by the **Market Research Society Code of Conduct** and the **Interviewer Quality Control Scheme**.

All interviewers employed directly by Island Ark receive the necessary training in order to put across a professional and friendly image to departing passengers, whilst still achieving the required number of interviews using the sampling manner determined.

Island Ark interviewers are also issued with a current copy of the Market Research Society Code of Conduct, printed interviewer instructions and identity cards.

Interview shifts are periodically checked to ensure that the interviewers are present and are undertaking their interviews in the manner specified.

Data Preparation & Processing

All returned questionnaires are hand-edited and coded in-house by Island Ark before data entry. Data entry screens, with controls over incorrect data entry have been set up by Island Ark, and data inputting is sub-contracted to Jersey Input Direct Ltd. Island Ark undertakes a final data cleaning process prior to analysis and conducts random checks of the data input.

It is vitally important in this survey that when grossing up sample survey results by large passenger volumes that the sample data inputted is accurate and realistic. Computer checks are run to verify data validity, and 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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