

# **2011 Travel Survey**

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

## **RESEARCH REPORT**

**21<sup>st</sup> February 2012**

## **Table of Contents**

	<b>Page No.</b>
<b>Summary of Results</b>	<b>1</b>
<b>Survey Results – Full Sample including Bailiwick routes</b>	<b>3</b>
Breakdown of total departing passengers	3
Visitors to Guernsey – Purpose of visit	3
Visitors to Guernsey – Country of residence	3
Visitors to Guernsey – UK Region of residence	4
Visitors to Guernsey – Additional profile information	5
Visitors to Guernsey – Breakdown by main routes	5
Guernsey Residents – Purpose of visit	6
Guernsey Residents – Additional profile information	6
Guernsey Residents – Breakdown by main routes	6
Returning Visitors – Breakdown by main routes	7
<b>Survey Results – Excluding Alderney, Sark and Herm Departures</b>	<b>8</b>
Breakdown of departing passengers	8
Total passenger departures 2007 – 2011	10
Visitors vs. residents 2007 – 2011	11
Visitor and resident departures by month 2011	12
Visitor volumes by air and sea 2007 – 2011	13
Visitors by country of residence 2007 – 2011	13
Staying visitors vs. day visits 2007 – 2011	14
Additional visitor profile information	15
Accommodation used by staying visitors	19
<b>Appendices</b>	<b>20</b>
Background and Aims	21
Methodology	21
Interview shifts and achieved sample size	22
Survey Outputs	23
Total passenger departures by route 2011 vs. 2010	24
Definitions	25
Fieldwork, interviewers & quality control	25
Data preparation & processing	25

## Summary of Results

- Over the whole of 2011, there were **775,500** departing passengers from Guernsey, including the inter-Bailiwick routes. This represents an increase of 5.1% (**37,500 passengers**) compared to 2010.
- There were **452,200** departures by air (+1.9%) and **323,300** departures by sea (+9.9%).
- In 2011, the largest volume increases have been on the East Midlands (+11.6%), Exeter (+9.2%), Bristol (+6.9%) and Gatwick (+6.1%) air routes and the Jersey (+34.1%), St. Malo (+17.8%), UK (+4.6%) and Sark (+9.5%) sea routes. The Isle of Man, Plymouth, Stansted, Manchester, Birmingham and Alderney air routes have seen year-on-year falls in passenger volume.
- Including the Bailiwick routes, there were **358,700 (+9.6%) visitor departures** and **349,800 (+0.3%) resident departures**. There were also **67,000 (+8.2%) "returning visitors"**, mainly on the Sark and Herm sea routes.
- Across all routes, the breakdown of visitors by purpose of visit was as follows:

- Staying Leisure Visitors	148,100	(-0.5%)
- Leisure Day Visitors	53,300	(+66.0%)
- Visiting Friends and Relatives	63,500	(-10.6%)
- Staying Business Visitors	52,100	(+14.3%)
- Business Day Visits	35,000	(+39.4%)
- Visitors from the UK were up by 5.9% to **232,400**, from Jersey were up by 27.9% to **48,600**, from France were up by 11.3% to **29,600**, from the other Islands within the Bailiwick were up by 26.7% to **15,200** and from Germany were up by 27% to **9,400**. The only main market to show a fall in visitor number was the Netherlands, down by 12.5% to **4,200**.
- Within the UK, the main increases in visitors have been from the South East, the South West and Greater London. Visitor numbers have also increased from the Yorkshire / Humberside region. Visitor numbers have fallen from the North West and West Midlands regions.
- Across all routes and purposes of visit, the average length of stay in 2011 for those staying at least a night was 4.46 nights, down from 4.81 nights in 2010.
- The average party size in 2011 was 2.17 persons, down from 2.25 persons in 2010 and the percentage of first-time visitors was 29% (down from 34% in 2010).
- **227,500** visitors departed by air in 2011 (+3.3%) and **131,200** by sea (+22.7%). For departing visitors, the main increases have been on the Gatwick and Jersey air routes, as well as the Jersey, St. Malo and Bailiwick sea routes.
- For Guernsey residents travelling off-Island in 2011, **220,800** travelled by air (+0.4%) and **129,000** travelled by sea, the same total as in 2010. There has been 6% increase in staying leisure visits off-Island and a 6.8% fall in business visits off-Island. Guernsey residents had an average stay off-Island of 3.88 nights (including day visits) and the average party size was 2.07 persons.
- "Returning visitors" increased by 8.2% to **67,000**, primarily due to increased visitors on the Bailiwick sea routes (Herm and Sark).

**The following summary of results excludes the Bailiwick air and sea routes:**

- Total departing passengers increased by 5.7% to **623,800**. Air passengers increased by 2.2% to **431,300** and sea passengers increased by 14.6% to **192,500**.
- There were **339,800** (+8.3%) visitor departures and **281,200** (+3%) resident departures. For departing visitors, **217,200** travelled by air and **122,700** travelled by sea.
- Excluding the Bailiwick routes, the breakdown of visitors by purpose of visit was as follows:

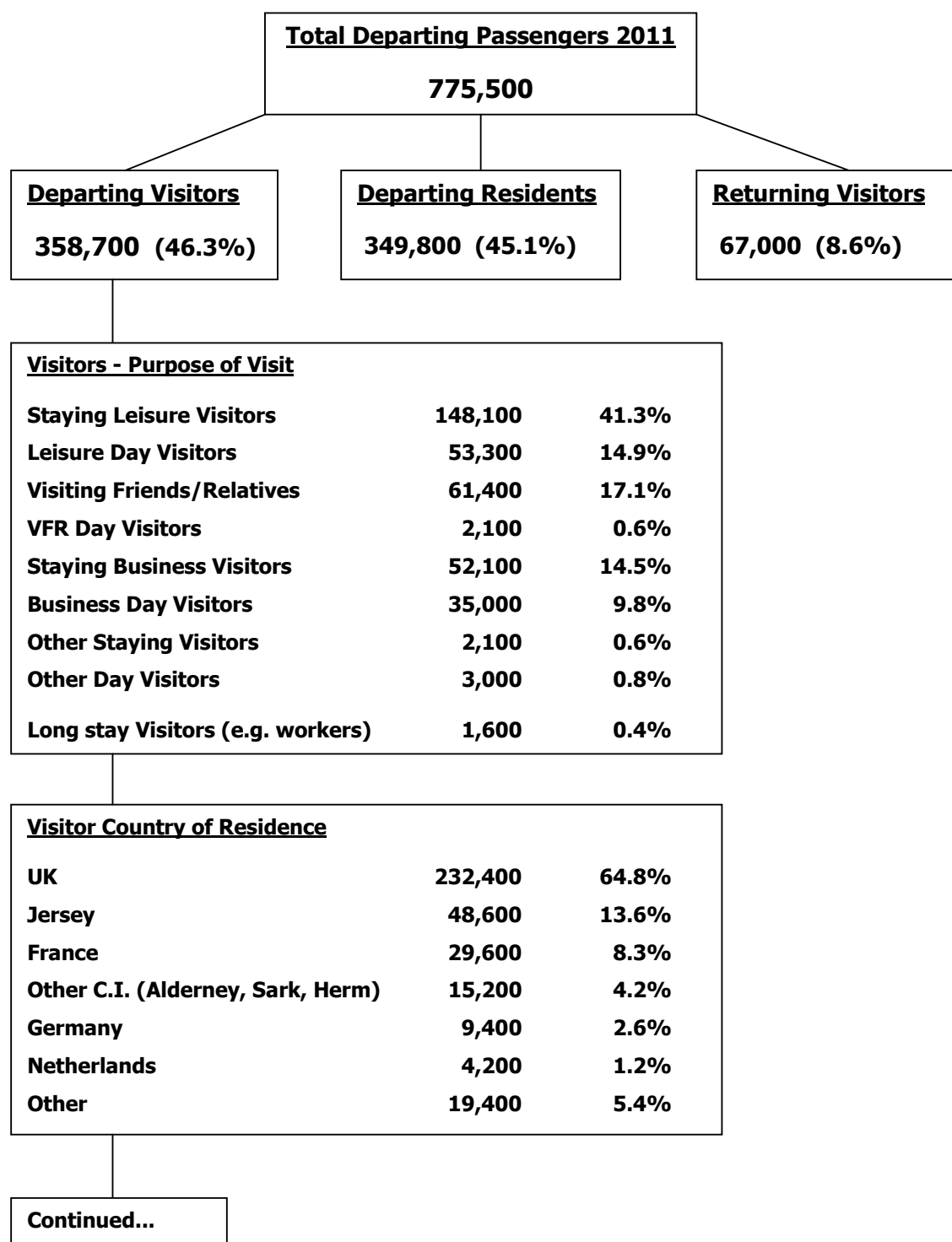
- Staying Leisure Visitors	143,100	(-1.4%)
- Leisure Day Visitors	46,700	(+63.1%)
- Visiting Friends and Relatives	62,000	(-10.3%)
- Staying Business Visitors	51,100	(+14.7%)
- Business Day Visits	33,500	(+39.0%)
- All months apart from May and October have shown year-on-year increases in visitor numbers; the most notable improvements being in April (+21.2%), September (+16.9%) and December (+19.6%).
- To the end of December, there has been a 0.6% decrease in visitors staying in Guernsey to **256,800** and a 50.1% increase in day visits to **83,100**, mainly on the Jersey and St. Malo sea routes, but also on the Jersey and Gatwick air routes. Excluding those visiting friends and relatives, there has been a 2.6% increase in staying visitors.
- For staying leisure visitors, 70.9% came from the UK, 10.1% from France, 4.8% from Jersey and 4.5% from Germany. Average length of stay was 4.82 nights, average party size was 2.3 persons and the percentage of first-time visitors to Guernsey was 45%. 56% of staying leisure visitors travelled to Guernsey by air and 44% travelled by sea. 74.4% stayed in a hotel, 10.3% in self-catering, 8% in other commercial accommodation and 7.2% stayed with friends or relatives or in other accommodation.
- For leisure day visits, 50.8% came from the UK, 24.4% from France, 14.5% from Jersey and 4.9% from Germany. The average party size was 2.49 persons and 49.8% were first-time visitors to Guernsey. 12% travelled by air and 41,300 travelled by sea, mainly on the UK and Jersey routes.
- For those visiting friend and relatives, 66.5% were from the UK, 28.6% were from Jersey and 3.5% were from France. They stayed for an average of 5.15 nights, with an average party size of 1.77 persons and 14.1% were visiting Guernsey for the first time. 82% travelled by air and 18% by sea. 21% stayed in commercial accommodation (primarily hotels) and 79% stayed with friends and family.
- For staying business visitors, 77.7% were from the UK and 9.6% were from Jersey. Their average stay was 3.09 nights, average party size was 1.48 persons and 20.6% were visiting Guernsey for the first time. 89% travelled by air and 11% by sea and 90.1% stayed in a hotel.
- 61.3% of business day visits were visitors from the UK and 34.3% were from Jersey. The average party size was 1.35 persons and 12.3% were visiting for the first time.
- Excluding visitors from within the Bailiwick, **194,300** visitors stayed in commercial accommodation up to the end of December, representing **797,600** bed nights sold. **58,800** visitors stayed with friends or family in Guernsey.

## Survey Results – Full Sample (Including Alderney, Sark and Herm routes)

All of the following charts and figures in this section include the air and sea departures to the other islands within the Bailiwick of Guernsey. Previous surveys prior to 2010 have not included these routes.

Detailed breakdowns of passenger arrivals on each major route can be found within the appendices to this report.

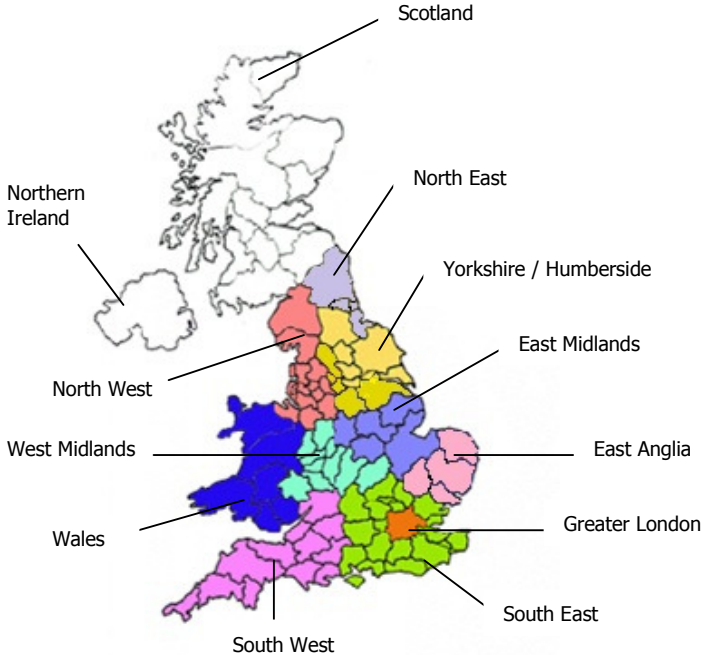
Overall, the total 2011 passenger numbers were broken down as follows:



<b><u>UK Visitors - Region of Residence</u></b>		
<b>South East</b>	<b>67,200</b>	<b>28.9%</b>
<b>South West</b>	<b>42,200</b>	<b>18.2%</b>
<b>Greater London</b>	<b>41,800</b>	<b>18.0%</b>
<b>North West</b>	<b>17,900</b>	<b>7.7%</b>
<b>West Midlands</b>	<b>14,800</b>	<b>6.4%</b>
<b>East Midlands</b>	<b>12,700</b>	<b>5.5%</b>
<b>Yorkshire / Humberside</b>	<b>11,200</b>	<b>4.8%</b>
<b>East Anglia</b>	<b>7,600</b>	<b>3.3%</b>
<b>Wales</b>	<b>6,600</b>	<b>2.8%</b>
<b>Scotland</b>	<b>5,900</b>	<b>2.5%</b>
<b>North East</b>	<b>2,800</b>	<b>1.2%</b>
<b>N. Ireland</b>	<b>1,200</b>	<b>0.5%</b>
<b>Isle of Man</b>	<b>500</b>	<b>0.2%</b>

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

**Region Definitions**



### **Additional Visitor Profile Information**

The following figures exclude long stay visitors (i.e. seasonal workers), and include visitors to Guernsey from the other islands within the Bailiwick:

Visitors to Guernsey in 2011 stayed for an average of **3.34 nights** (including day visitors).

Visitors to Guernsey in 2011 stayed for an average of **4.46 nights** (excluding day visitors).

The average party size for all visitors to Guernsey in 2011 was **2.17 persons**.

The percentage of first-time visitors to Guernsey in 2011 was **29%**.

The main routes for departing visitors were as follows:

#### **Air Routes**

Gatwick	74,700
Southampton	34,400
Manchester	19,100
East Midlands	10,400
Birmingham	8,900
Exeter	6,500
Bristol	7,200
Stansted	7,200
Other UK Air	1,900

**Total UK Air 170,300**

Jersey	41,900
Alderney	10,300
Foreign Air	5,000

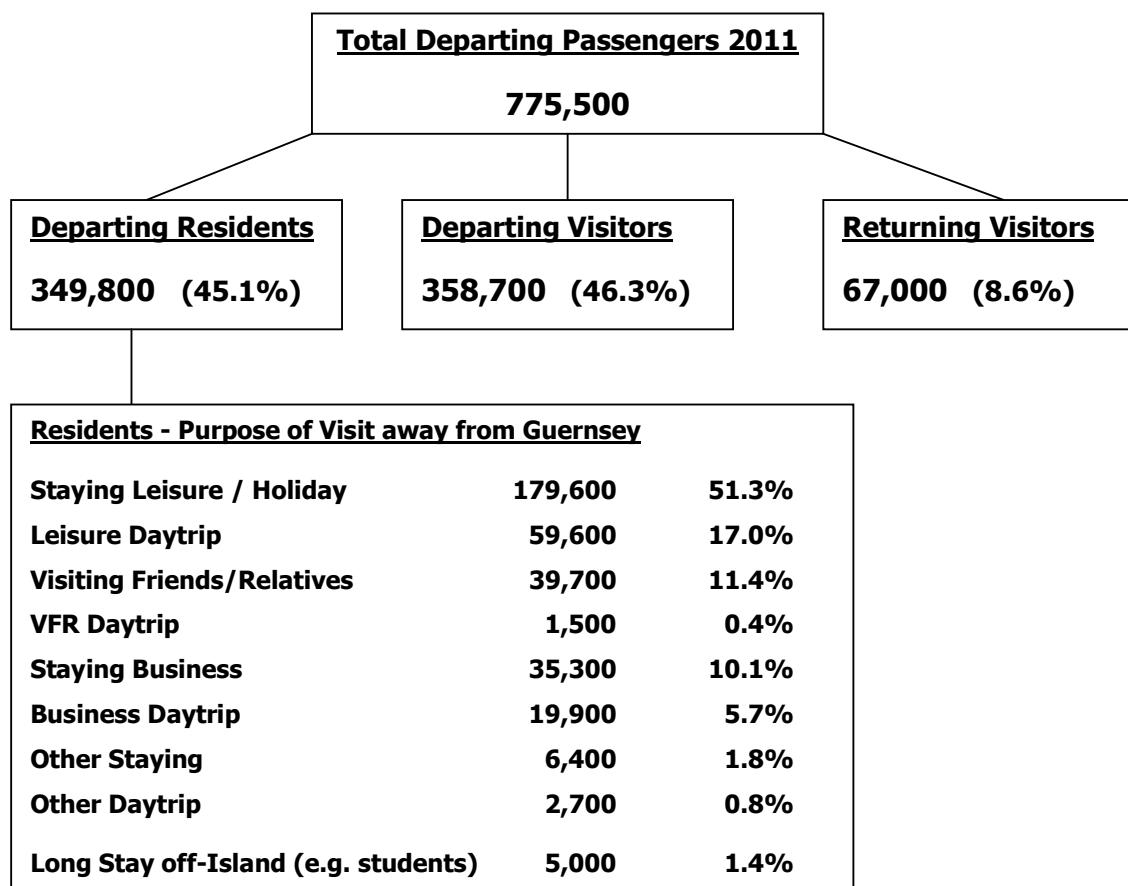
**Total Air 227,500**

#### **Sea Routes**

UK routes	58,500
Jersey	34,700
Herm	4,000
Sark	4,200
Alderney	300
St. Malo	22,100
Other French routes	7,400

**Total Sea 131,200**

**Resident Travel:**



The following figures exclude long stay off-Island (i.e. students or leaving Island) and include visits to other islands within the Bailiwick:

Departing residents had an average stay off-Island of **3.88 nights** (including daytrips).

Departing residents had an average stay off-Island of **5.85 nights** (excluding daytrips).

The average party size for residents departing from Guernsey was **2.07 persons**

The main routes for departing residents were as follows:

**Air Routes**

Gatwick	102,600
Southampton	32,500
Manchester	13,600
Bristol	5,700
Birmingham	4,700
Stansted	4,400
East Midlands	4,600
Exeter	5,800
Other UK Air	800

**Total UK Air      174,700**

Jersey	34,200
Alderney	8,500
Foreign Air	3,400

**Total Air            220,800**

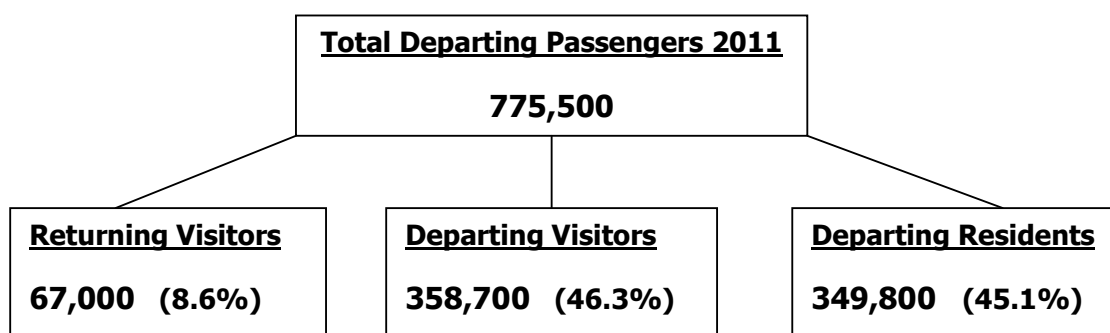
**Sea Routes**

UK routes	24,300
Jersey	21,900
Herm	37,900
Sark	21,900
Alderney	300
St. Malo	21,700
Other French routes	1,000

**Total Sea            129,000**



## 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 main routes for returning visitors were as follows:

### Air Routes

Alderney	2,100
Jersey	900
Other	1,000

**Total Air 4,000**

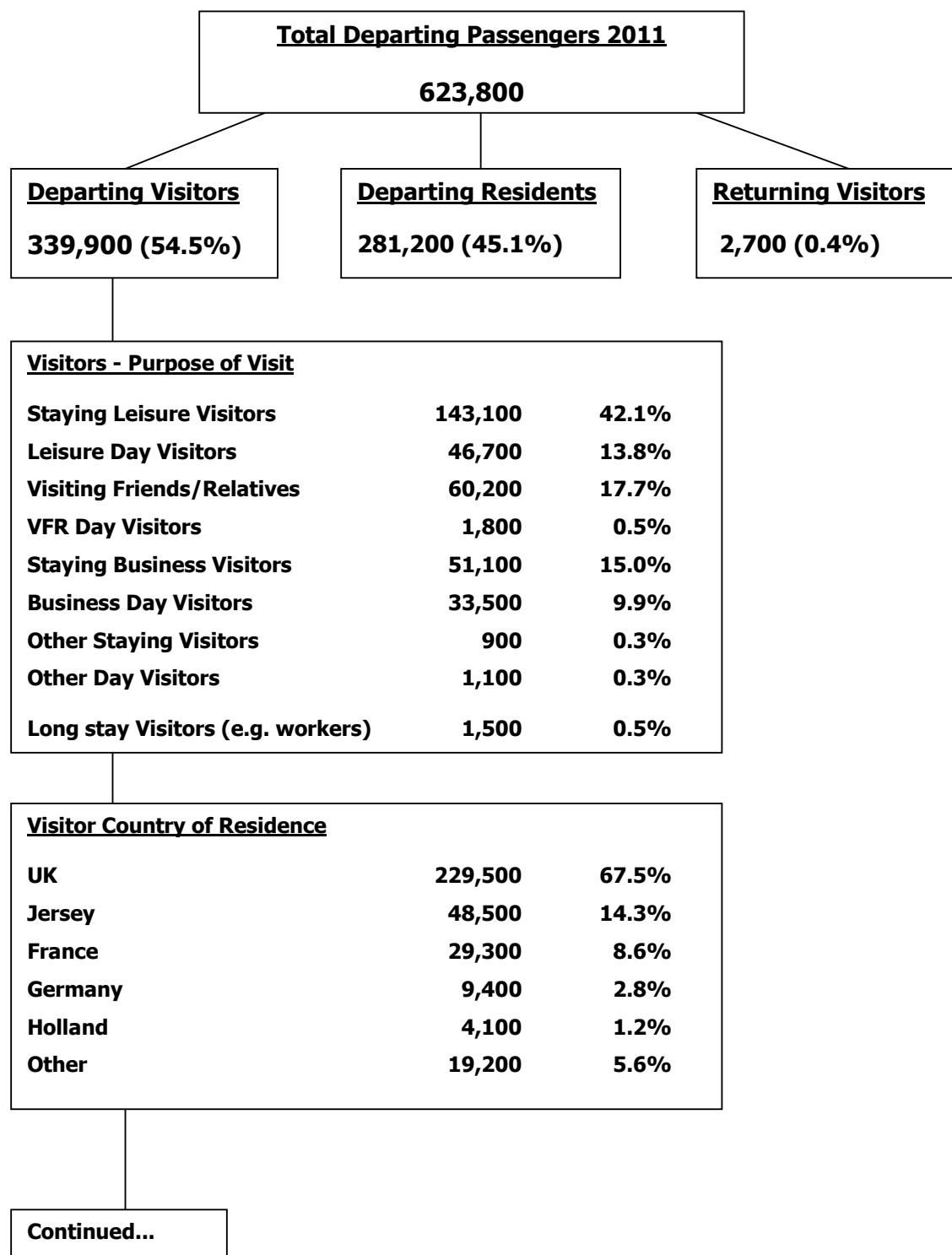
### Sea Routes

Herm	36,900
Sark	25,200
Other	1,000

**Total Sea 63,100**

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

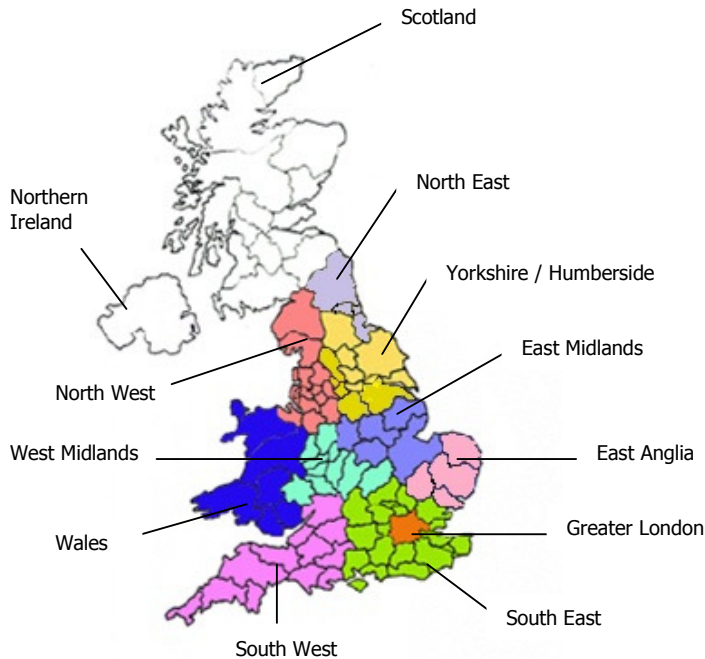
Excluding the Alderney, Sark and Herm routes, the total 2011 passenger numbers were broken down as follows:



<b><u>UK Visitors - Region of Residence</u></b>		
<b>South East</b>	<b>65,800</b>	<b>28.7%</b>
<b>South West</b>	<b>41,800</b>	<b>18.2%</b>
<b>Greater London</b>	<b>41,500</b>	<b>18.1%</b>
<b>North West</b>	<b>17,800</b>	<b>7.8%</b>
<b>West Midlands</b>	<b>14,700</b>	<b>6.4%</b>
<b>East Midlands</b>	<b>12,500</b>	<b>5.5%</b>
<b>Yorkshire / Humberside</b>	<b>11,100</b>	<b>4.8%</b>
<b>East Anglia</b>	<b>7,500</b>	<b>3.2%</b>
<b>Wales</b>	<b>6,600</b>	<b>2.9%</b>
<b>Scotland</b>	<b>5,900</b>	<b>2.6%</b>
<b>North East</b>	<b>2,800</b>	<b>1.2%</b>
<b>N. Ireland</b>	<b>1,200</b>	<b>0.5%</b>
<b>Isle of Man</b>	<b>500</b>	<b>0.2%</b>

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

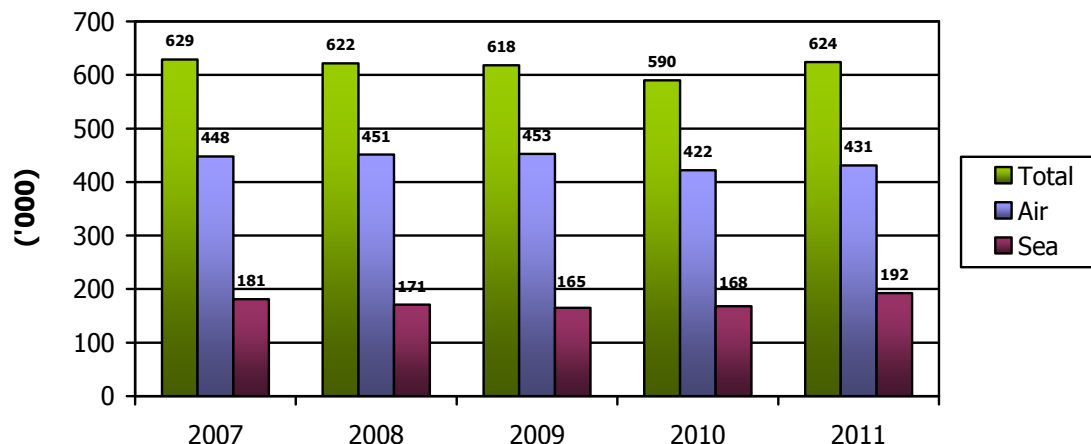
**Region Definitions**



## Comparisons with previous years

Please note that methodologies, definitions and sample sizes achieved on different routes may have changed between the 2011 survey and previous surveys.

### Passenger Departures 2007 - 2011



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

Passenger Departures by Route in 2011 (including Alderney, Sark and Herm):

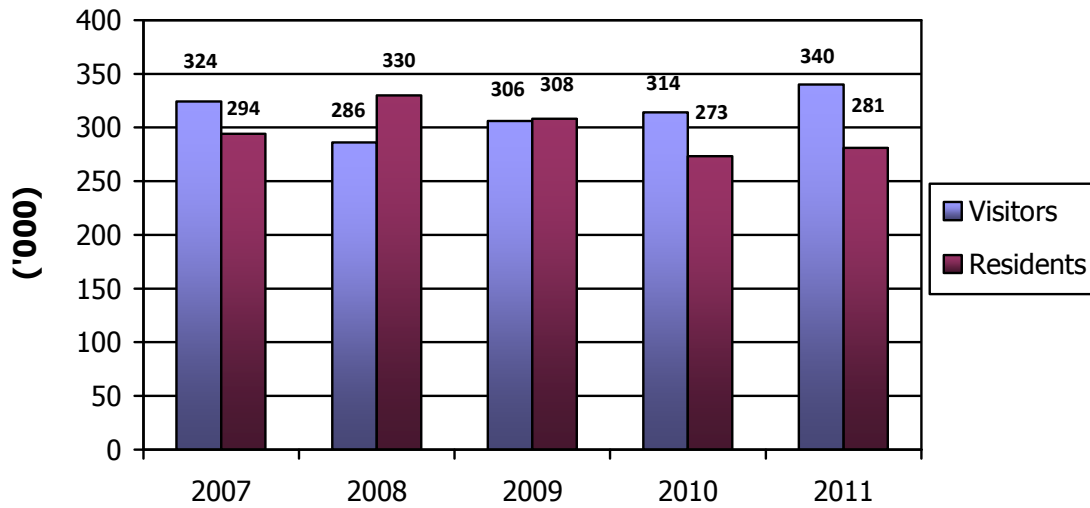
#### Air Routes

	<u>Volume</u>	<u>% of total pax.</u>		
London Gatwick	177,700	22.9%		
Southampton	67,200	8.7%		
Manchester	32,800	4.2%		
East Midlands	15,000	1.9%		
Birmingham	13,700	1.8%		
Bristol	13,000	1.7%		
Exeter	12,200	1.6%		
Stansted	11,600	1.5%		
Other UK Air	2,700	0.3%	Total UK Air: 345,900	44.6%
Jersey	77,000	9.9%		
Alderney	20,700	2.7%		
Other	200	*	Total CI Air: 98,000	12.6%
Dinard	3,600	0.5%		
Swiss Air	900	0.1%		
Other Foreign Air	4,000	0.5%	Total Foreign Air: 8,500	1.1%
<b>Total Air:</b>	<b>452,300</b>	<b>58.3%</b>		

#### Sea Routes

UK Sea	82,900	10.7%
Herm	78,800	10.2%
Jersey	57,200	7.4%
Sark	51,300	6.6%
St. Malo	43,900	5.7%
Other French Sea	8,400	1.1%
Alderney	700	0.1%
<b>Total Sea:</b>	<b>323,300</b>	<b>41.7%</b>

## Visitors vs. Residents 2007 - 2011

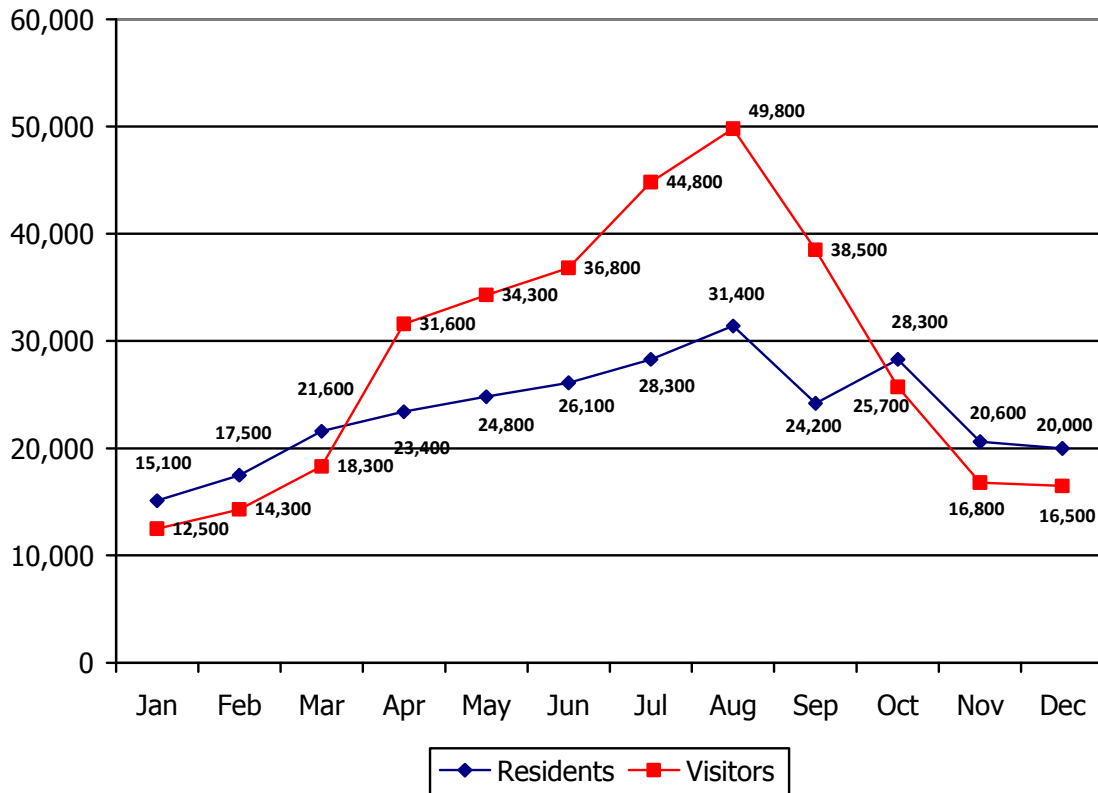


Excluding "returning visitors", 55% of departing passengers in 2011 were visitors to Guernsey, compared to 53% in 2010.

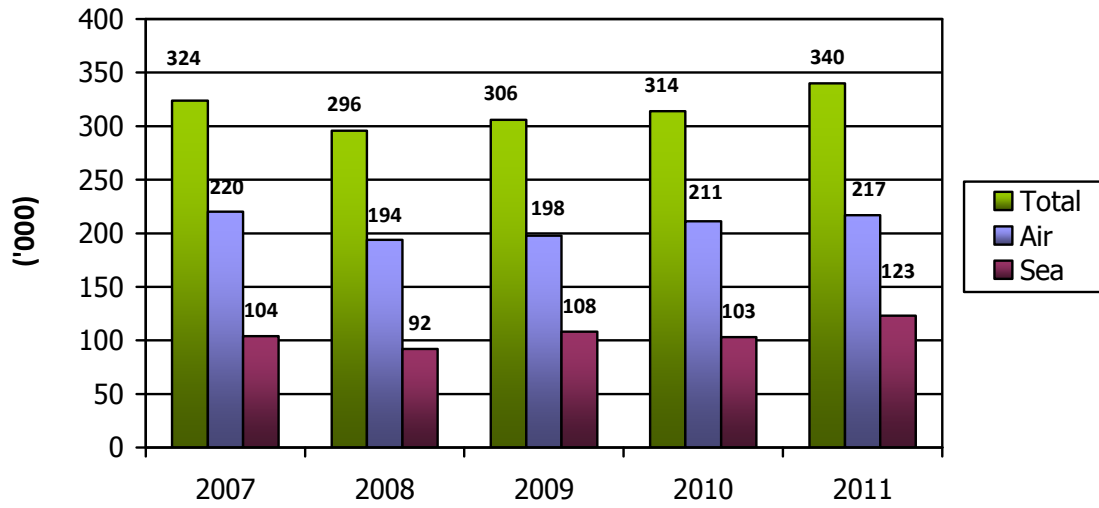
For air passengers, 217,200 (51%) were departing visitors and 212,300 were departing residents.

For sea passengers, 122,700 (64%) were departing visitors and 68,900 were departing residents.

### Visitor and Resident Departures by Month 2011

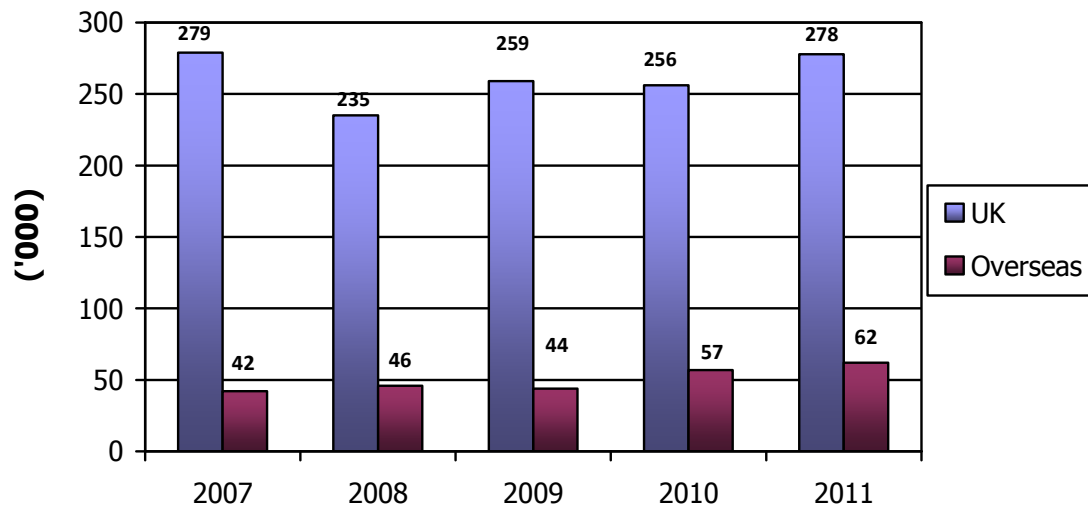


## Visitor Volumes 2007 - 2011



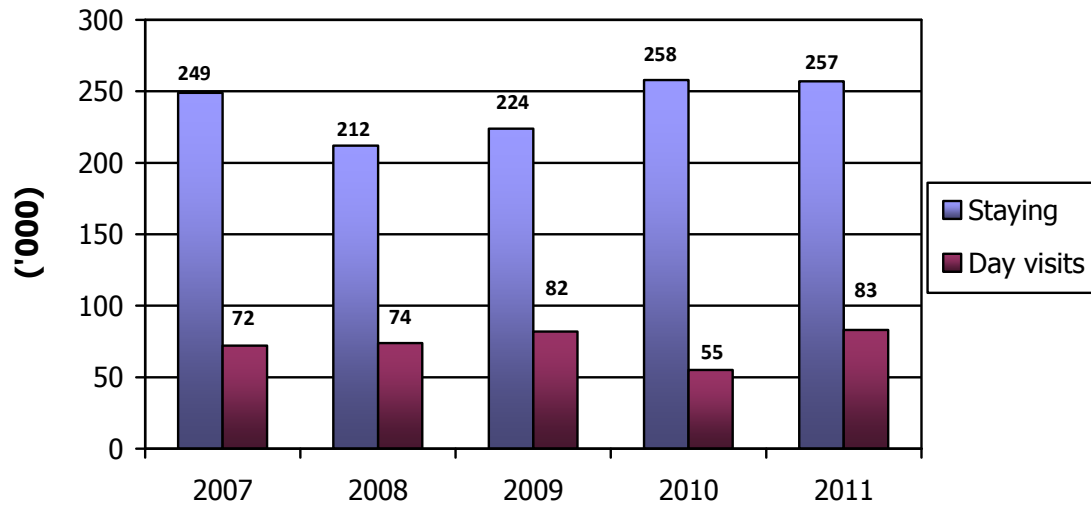
Compared to 2010, there has been an 8.3% increase in visitors to Guernsey, with a 3.1% increase in visitors by air and a 19.0% increase in visitors by sea.

## Visitor Country of Residence 2007 - 2011



**N.b. UK figures include Jersey**

## Staying Visitors vs. Day Visits 2007 - 2011



Compared to 2010, there has been a 0.6% decrease in visitors staying in Guernsey for at least 1 night, and a 50.1% increase in day visits to Guernsey.



## Additional Visitor Profiling Information

### Staying Leisure Visitors:

Country of residence:

UK	101,500	70.9%
France	14,400	10.1%
Jersey	6,900	4.8%
Germany	6,500	4.5%
Netherlands	3,200	2.3%
Other	10,600	7.4%

The average length of stay for staying leisure visitors in 2011 was **4.82 nights**.

The average party size for staying leisure visitors in 2011 was **2.30 persons**.

The percentage of first time staying leisure visitors to Guernsey in 2011 was **45.0%**.

**80,800** (56%) of staying leisure visitors travelled to Guernsey by air, with **70,000** (87%) of these travelling on the UK air routes. **62,300** travelled by sea.

Travel routes for staying leisure visitors:

UK Air	70,000	48.9%
Jersey Air	7,400	5.2%
Foreign Air	3,500	2.4%
UK Sea	34,800	24.3%
Jersey Sea	11,700	8.2%
St. Malo	15,200	10.6%
Other French Sea	600	0.4%
<b>Total</b>	<b>143,100</b>	

Accommodation stayed in for staying leisure visitors:

Hotel	106,500	74.4%
Guest Accommodation	4,500	3.1%
Self Catering	14,800	10.3%
With friends / relatives	8,600	6.0%
Camping	7,100	4.9%
Other	1,700	1.2%
<b>Total</b>	<b>143,100</b>	

### Leisure Day Visits:

Country of residence:

UK	23,700	50.8%
France	11,400	24.4%
Jersey	6,800	14.5%
Germany	2,300	4.9%
Netherlands	600	1.2%
Other	1,900	4.2%

The average party size for day visits in 2011 was **2.49 persons**.

The percentage of first time day visitors to Guernsey in 2010 was **49.8%**.

**5,500** (12%) of leisure day visitors travelled to Guernsey by air with **41,300** travelling by sea.

Travel routes for leisure day visitors:

UK Air	800	1.7%
Jersey Air	4,600	9.9%
UK Sea	10,100	21.6%
Jersey Sea	19,700	42.1%
St. Malo	4,800	10.4%
Other French Sea	6,700	14.3%
<b>Total</b>	<b>46,700</b>	

### Visiting Friends and Relatives (VFR):

**60,200** said that their main purpose of visit was to visit friends or relatives in Guernsey, and were also staying for at least a night. A further **1,800** said that they were on a day visit to see friends or family.

Country of residence:

UK	41,200	66.5%
Jersey	17,700	28.6%
France	2,200	3.5%
Other	900	1.4%

The average length of stay (excluding day visits) in 2011 was **5.15 nights**.

The average party size for staying VFR visitors in 2011 was **1.77 persons**.

The percentage of first time staying VFR visitors to Guernsey in 2011 was **14.1%**.

**50,600** (82%) of VFR visitors travelled to Guernsey by air, with **11,300** travelling by sea.

Travel routes for VFR visitors (day and stay):

UK Air	47,000	75.9%
Jersey Air	2,800	4.6%
Foreign Air	800	1.3%
UK Sea	7,800	12.7%
Jersey Sea	1,700	2.8%
St. Malo	1,700	2.7%
<b>Total</b>	<b>62,000</b>	

Accommodation stayed in for VFR visitors:

Hotel	10,000	16.6%
Guest Accommodation	700	1.1%
Self Catering	1,200	2.0%
Camping	600	1.0%
Other	200	0.3%
With friends/relatives	47,600	79.1%
<b>Total</b>	<b>60,200</b>	

**Staying Business/Conference Visitors:**

Country of residence:

UK	39,700	77.7%
Jersey	4,900	9.6%
France	1,000	2.0%
Ireland	800	1.5%
Switzerland	600	1.2%
Germany	500	1.0%
Other	3,600	7.0%

The average length of stay for staying business visitors in 2011 was **3.09 nights**.

The average party size for staying business visitors in 2011 was **1.48 persons**.

The percentage of first time staying business visitors to Guernsey in 2011 was **20.6%**.

**45,500** (89%) of staying business visitors travelled to Guernsey by air, with **5,600** travelling by sea.

Travel routes for staying business visitors:

UK Air	34,800	68.1%
Jersey Air	10,100	19.7%
Foreign Air	600	1.3%
UK Sea	4,400	8.6%
Jersey Sea	1,000	1.9%
St. Malo	200	0.4%
<b>Total</b>	<b>51,100</b>	

Accommodation stayed in for staying business visitors:

Hotel	46,100	90.1%
Guest Accommodation	900	1.7%
Self Catering	1,300	2.5%
With friends/relatives	2,500	4.8%
Other	400	0.9%
<b>Total</b>	<b>51,100</b>	

**Business Day Visits:**

Country of residence:

UK	20,500	61.3%
Jersey	11,500	34.3%
France	300	0.8%
Other	1,200	3.6%

The average party size for business day visits in 2011 was **1.35 persons**.

The percentage of first time business day visitors to Guernsey in 2010 was **12.3%**.

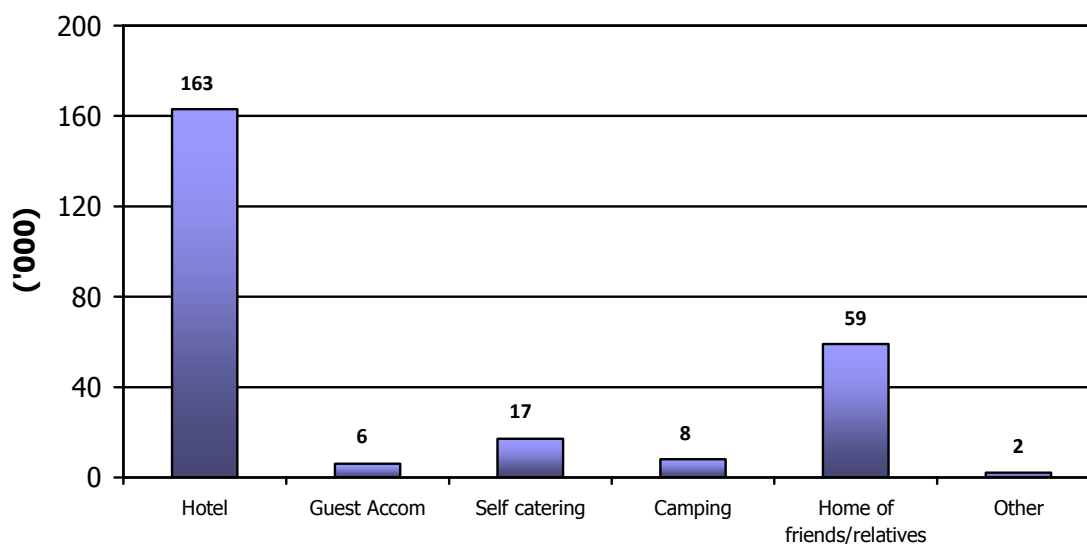
**32,100** (96%) of business day visitors travelled to Guernsey by air with **1,400** travelling by sea.

Travel routes for business day visitors:

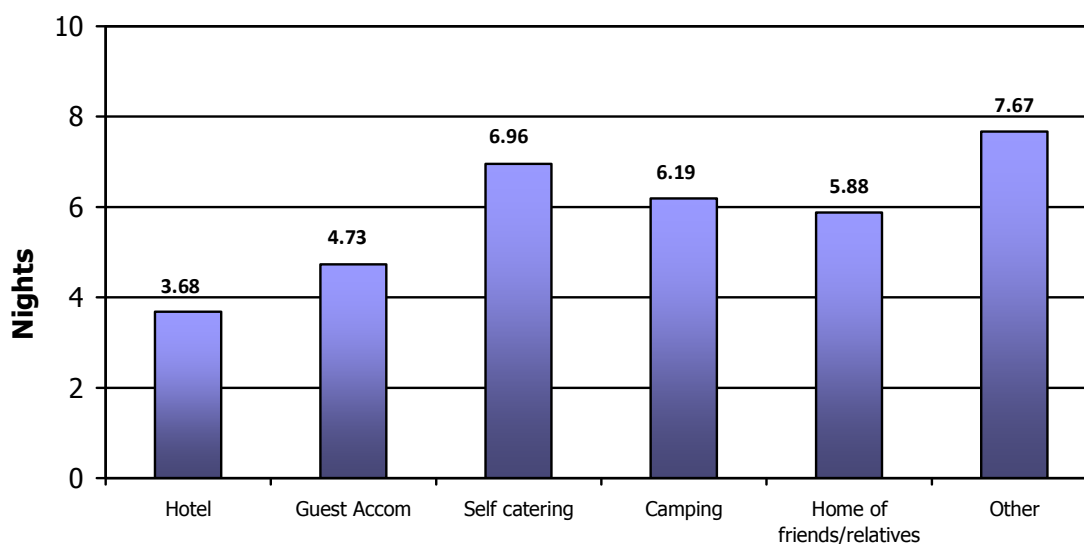
UK Air	16,100	47.9%
Jersey Air	16,100	47.9%
UK Sea	700	2.2%
Jersey Sea	600	1.8%
French Sea	100	0.2%
<b>Total</b>	<b>33,500</b>	

## Accommodation used by Staying Visitors in 2011 (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 **1,161,600** overnight stays in Guernsey in 2011, with **797,600** bed nights sold in commercial accommodation. The full breakdown was as follows:

Hotel bed nights:	601,000
Guest accommodation:	28,400
Self catering:	120,400
Camping:	47,700
Staying with friends/relatives:	345,900
Other	18,400

---

# **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. From 2011, fieldwork and the analysis (calibration) of the research data have been undertaken by Island Ark.

One major difference in approach from previous surveys is that from 2010 onwards, the survey has 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 where appropriate. The definition of holidaymakers and those visiting friends and relatives has also differed between previous surveys (See 2011 definitions in these appendices).

The broad objectives of the 2011 Exit Survey were as follows:

- Determine the passenger composition of each of Guernsey's main air and sea transport routes across the whole of 2011
- Consolidate this information in order to calculate visitor volumes over a one-year period 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 this full-year report, there are 4 quarterly reports for 2011. The yearly report provides a more detailed breakdown of visitors and also includes the Bailiwick routes.

## **Methodology**

As with previous exit surveys, face-to-face interviews were conducted with departing passengers throughout 2011, 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 used a random sampling methodology as far as possible. Interview shifts were planned to broadly represent passenger movements throughout the year, but the selection of respondents within those shifts was 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 had finished. This provided a randomised approach to interviewee selection, while ensuring that interviewer time was used as productively as possible.

Interview shifts were 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 was asked to one respondent within each travelling party, who responded on behalf of that party.

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

### **Interview shifts and achieved sample size**

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

**1,375 interviewer hours** were allocated to this Passenger Calibration Survey between February and December 2011. The exact shift schedules needed to be flexible in order to account for 2011 transport schedules, any new routes, changes to schedules, and cancellations or delays. Although interview shifts were planned in advance, travel movements and weather conditions were continuously monitored and shifts were altered as necessary.

As the fieldwork did not start until February 2011, survey data from January 2010 has been incorporated in the data set to represent January 2011.

**23,183 interviews were achieved, representing 50,228 departing passengers (6.5% of Guernsey's total departing passengers in 2011)** - 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 50,000 passengers provides a strong degree of statistical confidence in the results.

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:

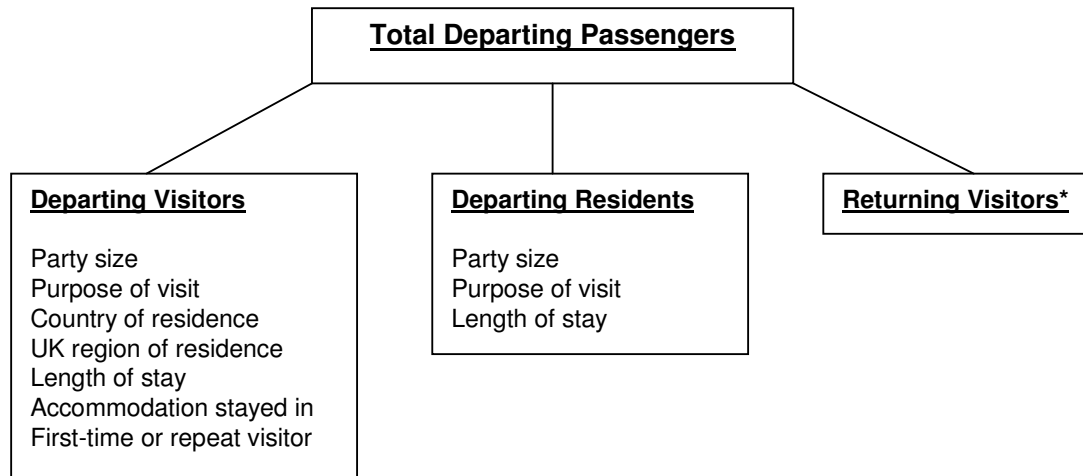
- Year-round passenger throughput.
- Passenger throughput at the various sampling points (Airport, Harbour Passenger and Car Terminals, Sark and Herm ferries).
- Representative coverage of weekdays and weekends as the profile of passengers differs by day of week. There was a slight bias toward weekend passengers in order to achieve adequate sample sizes on flights that only run at weekends.
- 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 was 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 were asked of visitors, and residents were also asked their purpose of visit and length of stay away from Guernsey.

The breakdown of passenger arrivals provided 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 was calculated for each major transport route to Guernsey in 2011, and was grossed up to show total air and total sea passenger breakdowns.

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

## 2011 Passenger Departures Including Alderney, Sark and Herm Departures

Cumulative Passenger Departures by Route January – December 2011 (including Alderney, Sark and Herm):

	<b><u>Volume</u></b>	<b><u>% of total pax.</u></b>	<b><u>2011 vs. 2010</u></b>
London Gatwick	177,700	22.9%	6.1%
Southampton	67,200	8.7%	-0.1%
Manchester	32,800	4.2%	-5.7%
East Midlands	15,000	1.9%	11.6%
Birmingham	13,700	1.8%	-4.1%
Bristol	13,000	1.7%	6.9%
Exeter	12,200	1.6%	9.2%
Stansted	11,600	1.5%	-8.2%
Other UK Air	1,700	0.2%	-45.6%
Plymouth	900	0.1%	-56.7%
Isle of Man	100	*	-61.6%
<b>Total UK Air</b>	<b>345,900</b>	<b>44.6%</b>	<b>2.1%</b>
Jersey	77,000	9.9%	2.3%
Alderney	20,700	2.7%	-4.2%
Other	200	*	74.0%
<b>Total CI Air</b>	<b>97,900</b>	<b>12.6%</b>	<b>1.0%</b>
Dinard	3,600	0.5%	-5.6%
Swiss Air	900	0.1%	-42.5%
Other Foreign Air	4,000	0.5%	37.2%
<b>Total Foreign Air</b>	<b>8,500</b>	<b>1.1%</b>	<b>2.4%</b>
<b>Total Air:</b>	<b>452,200</b>	<b>58.3%</b>	<b>1.9%</b>
UK Sea	82,900	10.7%	4.6%
Herm	78,800	10.2%	-0.2%
Jersey	57,200	7.4%	34.1%
Sark	51,300	6.6%	9.5%
St. Malo	43,900	5.7%	17.8%
Other French Sea	8,400	1.1%	-0.6%
Alderney	700	0.1%	16.0%
<b>Total Sea:</b>	<b>323,300</b>	<b>41.7%</b>	<b>9.9%</b>
<b>Total Departures:</b>	<b>775,500</b>		<b>5.1%</b>

## **2011 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, First Research had a requirement to provide best quality practice in all projects undertaken and to adhere to the guidelines set out by the **Interviewer Quality Control Scheme (IQCS)**.

All interviewers received 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 were issued with a current copy of the Market Research Society Code of Conduct, printed interviewer instructions and identity cards.

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

## **Data Preparation & Processing**

All returned questionnaires were hand-edited and coded in-house by First Research before data entry. Data entry screens, with controls over incorrect data entry were set up by First Research, and data inputting was sub-contracted to Jersey Input Direct Ltd. Island Ark undertook the final data cleaning prior to analysis.

It was vitally important in this survey that when grossing up sample survey results by large passenger volumes that the sample data inputted was accurate and realistic. Computer checks were run to verify data validity, and a minimum of 10% of the inputted questionnaires were 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 was ensured that any "outlying" data was manually checked back to the questionnaire and, if appropriate, was excluded from the sample where it could have a major impact on the grossed up results.

### **Island Ark Ltd.**

Floor 1  
Liberation Station  
St. Helier  
Jersey JE2 3AS

Telephone: 01534 719751  
Email: [julian@island-ark.com](mailto:julian@island-ark.com)  
Website: [www.island-ark.com](http://www.island-ark.com)