

2009 Travel Survey

for the States of Jersey Economic Development Department

RESEARCH SUMMARY

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**Island
Advance
Research &
Knowledge**



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Background and Aims

Through the Visitor Registration Scheme, Jersey Tourism has access to an extremely valuable and ongoing source of information on visitors staying in registered accommodation. Jersey also 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. This data is supplemented by other sources to provide estimates of total tourism volume broken down into differing visit purposes. However, the only way to accurately measure total tourism volume is by undertaking a comprehensive exit survey in order to break down (or calibrate) passenger arrivals figures from the Airport and Jersey's Harbours. Similarly, tourism visitor expenditure can only be accurately measured by surveying departing visitors, asking them about various elements of their expenditure whilst in Jersey. This detailed information helps the Economic Development Department, Jersey 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 objectives as set out in the Tourism Business and Strategic Plans.

Prior to 2009, the most recent passenger exit survey to break down passenger arrivals was undertaken in 2007, and prior to that in 2005. The most recent visitor expenditure survey was undertaken in 2007. Between surveys, annual visitor volume and expenditure estimates have been updated as accurately as possible with all available data in the interim, but the passenger composition of Jersey's transport routes, as well as the expenditure per visitor, are increasingly changing.

The Economic Development Department therefore commissioned a year-long Exit Survey to run throughout 2009 to provide accurate, updated information on visitor volume. The visitor expenditure survey of 2007 was not repeated, with this provisionally scheduled for 2011.

The broad objectives of this 2009 survey were defined within the brief as follows:

- Determine the passenger composition of each of Jersey's main air and sea transport routes by season and across the whole of 2009
- Consolidate this information in order to calculate visitor volume over a one-year period broken down into different visitor segments
- Provide information on visitor purpose of visit, country of residence and their ultimate destination
- Determine the prices paid by visitors for travel to and from the Island for differing routes
- Provide basic profiling information for visitor segments (country of residence, average stay) to determine and update visitor volume and expenditure estimates for 2009

Methodology and Outputs

As with previous exit surveys, face-to-face interviews were conducted with departing passengers throughout 2009, 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, Elizabeth passenger and car terminals, Albert Quay and Gorey.

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

A supply of questionnaires was translated into **French, German, Polish and Portuguese**. Interviewers with French and German language skills were allocated to appropriate shifts where language skills were helpful.

Interview shifts

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 Jersey's main transport routes in order to break down the passenger numbers on those routes.

2,200 interviewer hours were allocated to this Passenger Calibration Survey. The exact shift schedules needed to be flexible in order to account for 2009 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.

It was anticipated that 35,000 interviews would be completed, representing circ. 80,000 departing passengers. **50,726 interviews were actually achieved, representing over 108,000 departing passengers (nearly 10% of Jersey's total departing passengers in 2009)** - making this the most comprehensive survey of departing passengers from Jersey to date. Levels of statistical reliability for any individual route vary depending upon the sample sizes achieved for that route, but the cumulative sample size of over 108,000 passengers provides a strong degree of statistical confidence in the results.

By continuously inputting the data from the questionnaires throughout the year, the sample sizes achieved on any individual route were kept updated. If some routes were felt to be inadequately covered by the survey, interview shifts were re-scheduled accordingly.

The detailed interview shifts were planned monthly in advance so that interviewers and the Airport and Harbour authorities were aware of the timetable, but there was flexibility in the schedules as detailed above. Interview shifts were planned to take account of the following:

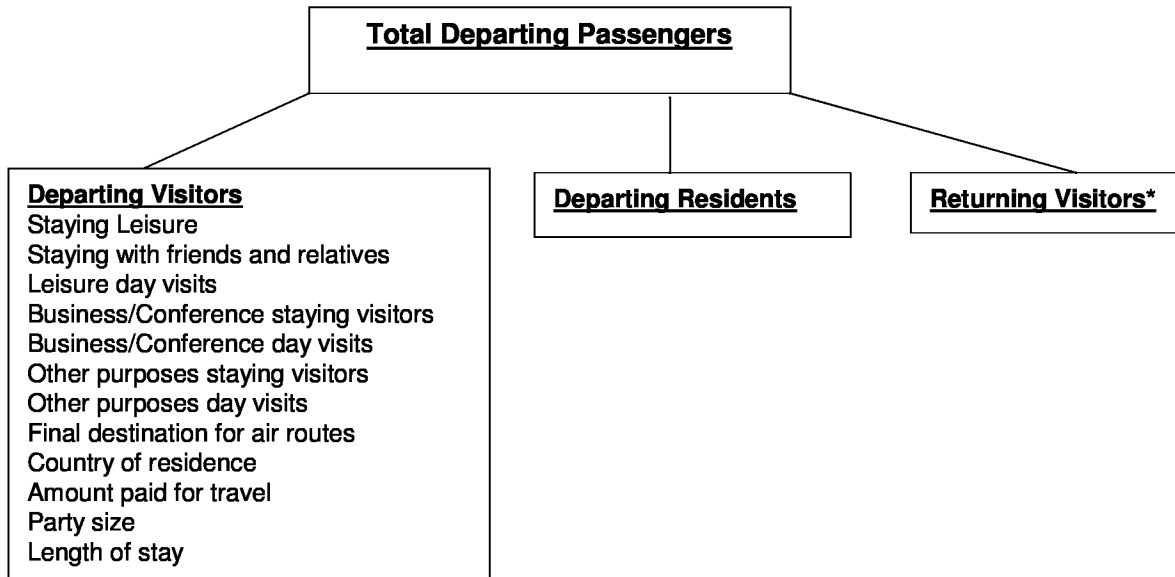
- Year-round passenger throughput.
- Passenger throughput at the various sampling points (Airport, Albert Quay, Elizabeth Passenger Terminal and Elizabeth Car Terminal, Gorey). Extra care was taken in allocating interviewer shifts at the Elizabeth terminals to reflect passenger volume movements through the passenger and car terminals.
- 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 (e.g. charters).
- Representative coverage of passenger movements by time of day (e.g. the profile of passengers leaving Jersey early in the morning is different to the profile of passengers departing at the end of the day).

The detailed planning of interviewer shifts and the placement of interviewers was finalised following discussion with the relevant Airport and Harbour authorities.

Survey Outputs

The primary aim of this part of the survey was to determine the breakdown of passengers on each route in order to determine the overall number of visitors to Jersey by purpose of visit and country of residence. An additional question was asked of visitors departing on air routes to determine their ultimate destination, and visitors were also asked how much they had paid for their return travel.

The breakdown of passenger arrivals provided the following information for every major route to Jersey:



***Returning visitors are those who are counted twice in passenger numbers because they visit elsewhere during their stay in Jersey.**

The above breakdown of passengers was provided for each major transport route to Jersey, and was grossed up to show total air and total sea passenger breakdowns. A seasonal breakdown of passengers was also calculated with the seasons defined as follows:

Spring	-	April, May and June
Summer	-	July and August
Autumn	-	September and October
Winter	-	January, February, March, November, December

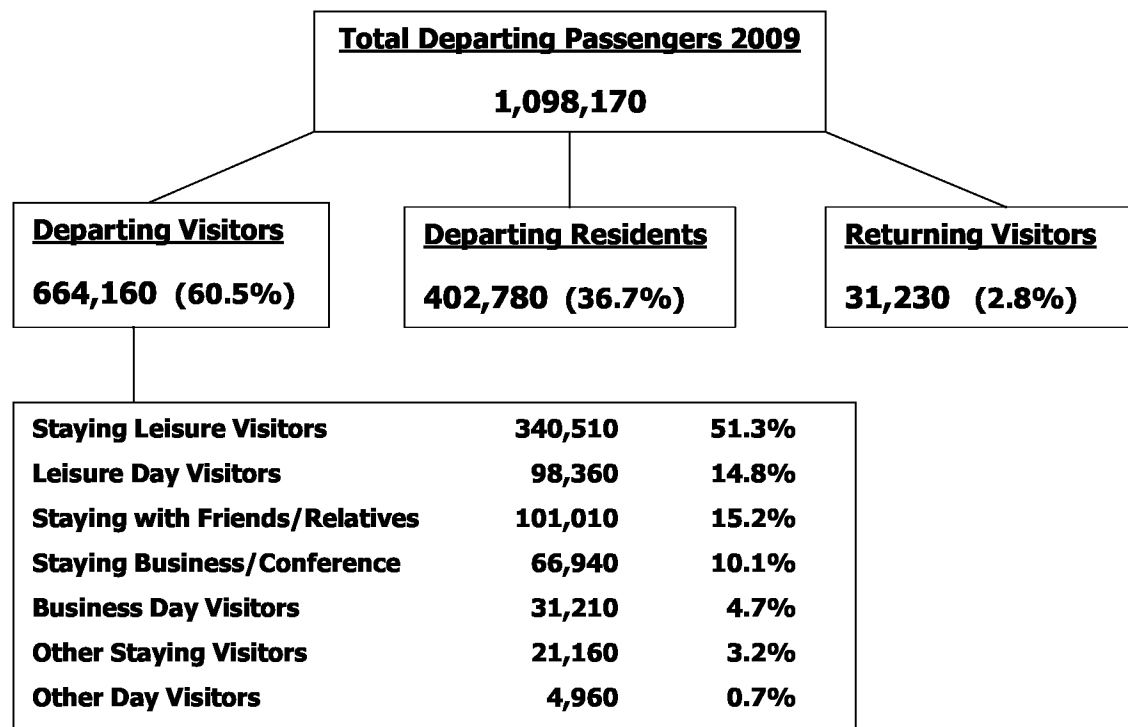
For visitors, the country of residence was also determined within each purpose of visit.

As sample sizes for some of the smaller transport routes were not large enough on a 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.

Survey Results

The results from this Calibration Exit Survey were incorporated into the Jersey Tourism 2009 Annual Report and detailed breakdowns of passenger arrivals on each route are appended to this summary report.

Overall, the total 2009 passenger numbers were broken down as follows:



Overall, visitors to Jersey in 2009 paid an average return fare of **£106.39**.

The average stay of visitors in 2009, including day visits, was **3.9 nights**.

Staying Leisure Visitors:

A more detailed breakdown of staying leisure visitors is derived from completed visitor registration cards, with their country of residence as follows:

UK	258,180	75.8%
Ireland	5,570	1.6%
Other CI	16,590	4.9%
France	34,260	10.1%
Germany	9,270	2.7%
Netherlands	3,150	0.9%
Other	13,490	4.0%

The average length of stay for staying leisure visitors in 2009 was **4.35 nights**.

One of the main purposes of the Exit Survey is to derive multipliers to apply to the numbers of visitors declared on visitor registration cards (due to non-completion or non-return of cards). The results of the 2009 Exit Survey have resulted in a reduction in the multiplier from the 2007 survey of 1.1597 to 1.1086. This has probably resulted from fewer accommodation establishments and a higher proportion of the remaining ones submitting their data electronically straight from their own reservations systems.

From the Exit Survey, 235,830 (69%) of staying leisure visitors travelled to Jersey by air, with 214,300 (91%) of these travelling on the UK air routes.

Travel routes for staying leisure visitors:

UK Air	214,300	62.9%
CI Air	10,390	3.1%
Foreign Air	11,130	3.3%
UK Sea	55,170	16.2%
Inter-Island Sea	12,750	3.7%
St. Malo	32,890	9.7%
Other French Sea	3,860	1.1%
Total	340,510	

Leisure Day Visitors:

A more detailed breakdown of leisure day visitors is derived from the Exit Survey, with their country of residence as follows:

UK	11,650	11.8%
Other CI	16,120	16.4%
France	53,000	53.9%
Other	17,590	17.9%
Total	98,360	

90,550 (92%) of leisure day visitors travelled to Jersey by sea, with 70,530 (78%) of these travelling on the French sea routes.

Travel routes for leisure day visitors:

UK Air	1,910	1.9%
CI Air	5,830	5.9%
Foreign Air	80	0.1%
UK Sea	8,040	8.2%
Inter-Island Sea	11,980	12.2%
St. Malo	49,120	49.9%
Other French Sea	21,410	21.8%
Total	98,360	

Staying with Friends and Relatives (VFR):

A more detailed breakdown of the VFR market is derived from the Exit Survey, with their country of residence as follows:

UK	81,190	80.4%
Other CI	3,500	3.5%
Ireland	3,110	3.1%
France	2,840	2.8%
Portugal	1,630	1.6%
Other	8,740	8.7%
Total	101,010	

Those staying with friends and relatives stayed for an average of **6.17 nights** in 2009.

90,300 (89%) of the VFR market travelled to Jersey by air, with 82,670 (92%) of these travelling on UK air routes.

Travel routes for those staying with friends and relatives:

UK Air	82,670	81.8%
CI Air	2,880	2.9%
Foreign Air	4,750	4.7%
UK Sea	5,590	5.5%
Inter-Island Sea	1,270	1.3%
French Sea	3,850	3.8%
Total	101,010	

Staying Business/Conference Visitors:

The Exit Survey showed a total of 66,940 staying business and conference visitors in 2009. The Jersey Conference Bureau declared 2009 conference delegate numbers to be 9,240, leaving 57,700 staying business visitors.

A more detailed breakdown of staying business visitors is derived from completed visitor registration cards, with their country of residence as follows:

UK	48,220	83.6%
Ireland	690	1.2%
Other CI	2,590	4.5%
France	1,610	2.8%
Germany	630	1.1%
Switzerland	620	1.1%
Other	3,340	5.8%
Total	57,700	

The average length of stay for staying business visitors in 2009 was **2.28 nights** and the average length of stay for conference delegates was **4.12 nights**.

From the Exit Survey, 60,430 (90%) of staying business/conference visitors travelled to Jersey by air, with 51,790 (86%) of these travelling on the UK air routes.

Travel routes for staying business/conference visitors:

UK Air	51,790	77.4%
CI Air	6,830	10.2%
Foreign Air	1,810	2.7%
UK Sea	4,660	7.0%
Inter-Island Sea	500	0.7%
French Sea	1,350	2.0%
Total	66,940	

Business Day Visitors:

A more detailed breakdown of business day visitors is derived from the Exit Survey, with their country of residence as follows:

UK	20,210	64.8%
Other CI	9,220	29.5%
France	930	3.0%
Other	850	2.7%
Total	31,210	

29,630 (95%) of business day visitors travelled to Jersey by air, with 19,720 (67%) of these travelling on the UK air routes.

Travel routes for business day visitors:

UK Air	19,720	63.2%
CI Air	9,860	31.6%
Foreign Air	50	0.2%
UK Sea	420	1.3%
Inter-Island Sea	280	0.9%
French Sea	870	2.8%
Total	31,210	

Fieldwork, Interviewers and Quality Control Standards

As a member of the Market Research Society, First Research is committed to providing best quality practice in all projects undertaken and will 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, identity cards and a small 'thank you' leaflet to leave with interviewees.

The directors of First Research, as well as the Fieldwork Manager, periodically checked interview shifts 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 will be set up by First Research, and data inputting was sub-contracted to Jersey Input Direct Ltd. who have undertaken data input jobs for us over many years.

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 by the directors of First Research 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.

Once inputted, data was analysed using a statistical software package called SPSS.

Costs

The total cost of undertaking the year-long exit survey was **£65,000**.