

Guernsey Travel and Visitor Annual Report

2023

Issue date 20th February 2024

The Guernsey Travel and Visitor Annual report provides information on travellers into and out of the Island of Guernsey during the year and additional analysis on visitor experiences from the Guernsey Visitor Survey.



States of Guernsey
Data and Analysis

1.1 Introduction

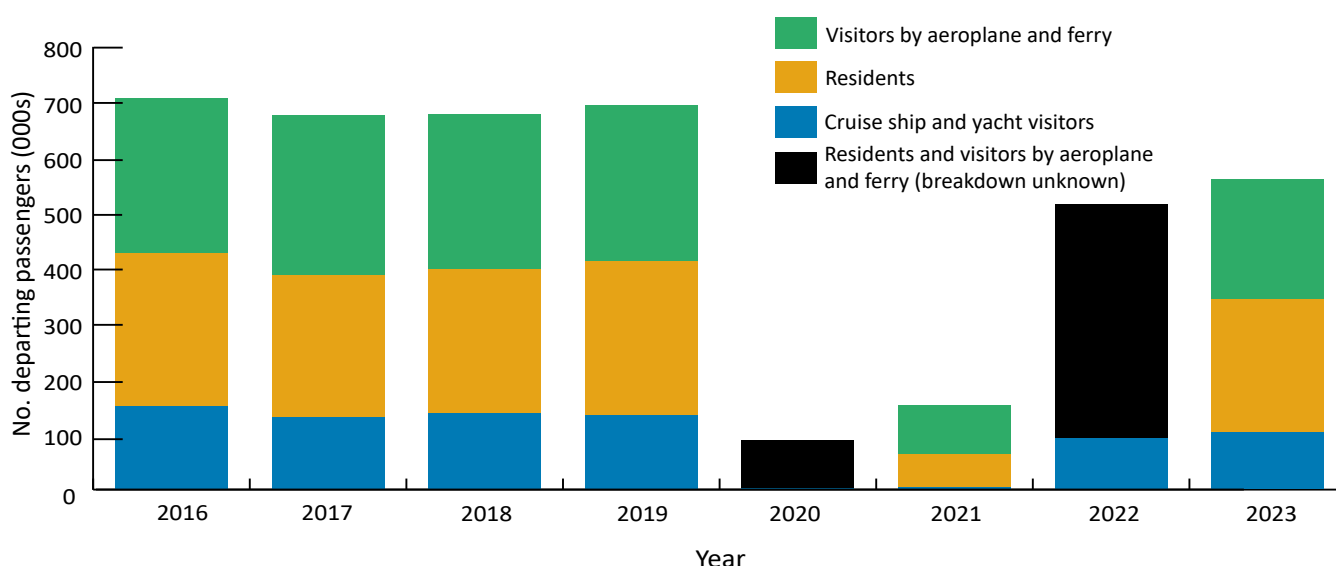
The Guernsey Travel and Visitor Annual report provides information on visitors to the Island of Guernsey, as well as Guernsey residents travelling to destinations outside the Bailiwick during 2023.

The information in this report is derived from passenger volume data which is collected monthly by Guernsey Ports and used to calibrate exit interviews conducted at the airport and harbour by fieldworkers. Occupancy information presented in this report is sourced from data provided by visitor accommodation providers. It should be noted that the passenger volume figures presented exclude travel between the Islands within the Bailiwick of Guernsey. Also, Herm, Sark and Alderney residents are only included in the analysis if they were in Guernsey “in transit” i.e. travelling via Guernsey to or from somewhere outside of the Bailiwick. For reporting purposes within this Bulletin, they are classified as Visitors and the purpose of their visit is classified as “Other” (along with residents of places outside the Bailiwick of Guernsey that were transiting through Guernsey on their way to or from a destination outside the Bailiwick).

In addition this annual report includes information from the 2023 Visitor Survey which includes experiences of visitors to Guernsey, activities undertaken by visitors and their rationale and reasons for visiting Guernsey. Information from the 2023 Visitor Survey is based upon a much smaller sample of Visitors, who completed an exit interview with a fieldworker at the airport or harbour during 2023 and then also opted to self-complete an online Visitor Survey afterwards.

1.2 Headlines

Figure 1.2.1 Passenger volumes - departing passengers



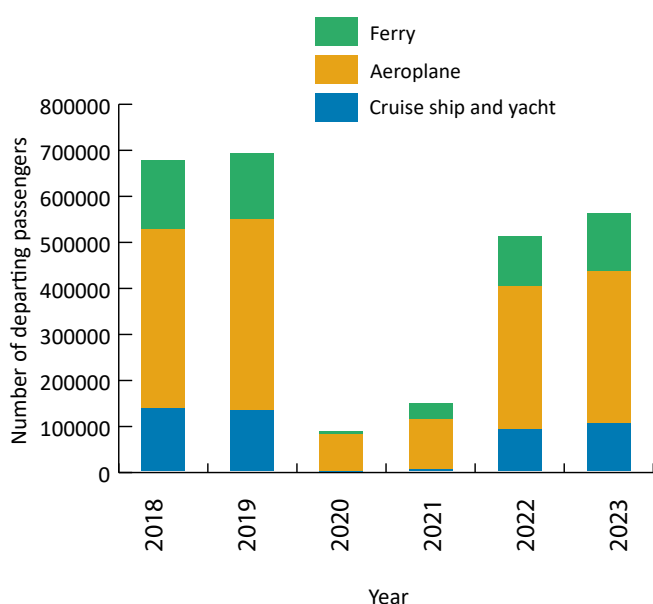
COVID-19 related requirements were put in place for people travelling into Guernsey in February 2020 and remained in place throughout 2021 with no non-essential travel allowed between 12th March 2020 and 20th May 2020 or between 14th January 2021 and 22nd March 2021. The requirements varied depending on the country of origin and vaccination status of the traveller. All COVID-19 related travel restrictions were lifted on 17th February 2022, as can be seen in [Figure 1.2.1](#).

1.2 Headlines (continued)

- The total number of (resident and visiting) passengers (including any cruise and yacht passengers) departing Guernsey was 563,879 during 2023. This compares with 513,349 during 2022; an increase of 10%. However, it is 19% lower than 2019.
- During 2023, 59% of passengers departed by aeroplane, 23% by ferry and 18% by cruise ships or yachts. In 2019 the breakdown was: 60% of passengers departing by aeroplane, 21% by ferry, and 19% by cruise ships or yachts. It should be noted that the weather can impact on travel volumes and have different impacts on the different modes of transport.
- The number of departing passengers travelling by aeroplane was 332,345 in 2023, 7% more passengers than in 2022 and 20% fewer than in 2019. The number of departing passengers travelling by ferry was 128,614 in 2023, 15% more passengers than in 2022 and 13% fewer than in 2019. The number of cruise and yacht passengers was 102,920 in 2023, 14% more passengers than in 2022 and 22% fewer than in 2019.
- 62% of departing passengers were going to an air or sea port in the UK, 11% Jersey, 9% rest of the world and 18% were on a cruise ship or yacht trip during 2023.
- The total number of departing residents was 238,660; 14% lower than 2019. The number of residents travelling by aeroplane in 2023 was 18% lower than the number travelling by aeroplane in 2019. The number of residents travelling by ferry in 2023 was 3% higher than the number travelling by ferry in 2019.
- The total number of departing visitors (including any cruise and yacht passengers) for 2023 was 320,038; 23% lower than 2019. The total number of departing visitors (excluding any cruise and yacht passengers) for 2023 was 217,118; also 23% lower than 2019.
- Of the visitors: 34% were mainly visiting for leisure, 18% were mainly seeing friends or family, 9% were visiting for business purposes, 6% were visiting for another main purpose, less than 1% were long stay visitors (staying more than 30 nights but less than 1 year) and 32% were on a cruise ship or yacht trip. 48% of visitors during 2023 were from the UK, 5% from France, 6% from Jersey and 9% from elsewhere (including Alderney, Sark and Herm). The country of residence was unknown for the 32% who were visiting on a yacht or cruise ship.
- The 2023 Visitor Survey asked leisure visitors “Which of the following attracted you to visit Guernsey?”. 85% of respondents cited that the natural beauty of the Island and its beaches attracted them to Guernsey. The second most popular reason was the history and heritage (54% of respondents) and the third most popular reason was the climate (40% of respondents). It also asked business travellers “When you visited Guernsey, what type of business were you undertaking?” and 46% said a small meeting/board meeting or similar.
- Results from the 2023 Visitor Survey indicate that the most popular activity (undertaken by 85% of all visitors leaving by aeroplane or ferry during 2023) was eating and/or drinking out, followed by visiting sites of natural beauty (including beaches) at 73% and walking and/or running, undertaken by 66% of respondents. [Page 22](#) provides information on the most and least enjoyable aspects of survey respondents’ visits.
- The overall net promoter score for 2023 was 61 percentage points.

2.1 Passenger volumes

Figure 2.1.1 Passenger volumes



Data is collected by Guernsey Ports on the volumes of passengers travelling into and out of Guernsey. Just the volumes of passengers leaving the Island are presented here to represent the number of people (since most people have both outbound and return travel). It should be noted that these passenger volume figures exclude travel between the Islands within the Bailiwick of Guernsey. Herm, Sark and Alderney residents are only included in the analysis if they were in Guernsey “in transit” i.e. travelling via Guernsey to or from somewhere outside of the Bailiwick.

As shown in **Figure 2.1.1** the COVID-19 related travel requirements (which were put in place for people travelling into Guernsey in February 2020 and remained in place throughout 2021 with no non-essential travel allowed between 12th March 2020 and 20th May 2020 or between 14th January 2021 and 22nd March 2021) had a significant impact on passenger volumes. For this reason comparisons of passenger volumes are made with 2022 and years that were prior to the COVID-19 travel requirements. Total departing passengers in 2023, as shown in **Table 2.1.1**, was 563,879, 10% higher than 2022, but 19% lower than pre COVID-19 passenger volumes in 2019.

59% of all departing passengers travelled by aeroplane in 2023, 332,345 people, 7% higher than 2022 but 20% lower than 2019. 23% of all passengers travelled by ferry in 2023, 128,614 people, 15% higher than 2022 but 13% lower than 2019.

Table 2.1.1 Passenger volumes

	2019	2020	2021	2022	2023	Annual % change	4 yr % change
Passengers departing Guernsey by aeroplane	415,465	78,586	110,315	311,501	332,345	7%	-20%
Passengers departing Guernsey by ferry	147,541	9,709	36,746	111,369	128,614	15%	-13%
Passengers departing Guernsey by cruise ship and yacht	131,922*	376*	3,369*	90,479*	102,920*	14%	-22%
Total departing passengers	694,928	88,671	150,430	513,349	563,879	10%	-19%

*Between Q4 2019 and Q2 2023 the number of people visiting by yacht was unknown, but the number has been inferred from the number of visiting yachts and the average number of people each vessel typically has on board.

2.2 Passenger volumes - destination

Data from Guernsey Ports is also available regarding the destinations of those travelling out of Guernsey by aeroplane and ferry. At present, the destination of those departing on cruise ships or yachts cannot be provided, but the total volume of departures is included for completeness.

Figure 2.2.1 shows passenger volumes by destination, the COVID-19 related travel requirements (which were put in place for people travelling into Guernsey in February 2020 and remained in place throughout 2021 with no non-essential travel allowed between 12th March 2020 and 20th May 2020 or between 14th January 2021 and 22nd March 2021) had a significant impact on passenger volumes. For this reason comparisons of passenger volumes are made with 2022 and years that were prior to the COVID-19 travel requirements.

62% of all passengers departed Guernsey for the UK, totalling 346,806 people in 2023, 8% higher than 2022 but 16% lower than 2019. 11% of all passengers departing Guernsey were travelling to Jersey and totalled 63,916 people in 2023, 17% higher than 2022 but 33% lower than 2019. 9% of passengers departed Guernsey for the rest of the world and totalled 50,237 people in 2023, 9% higher than 2022 and 7% lower than 2019. 18% of passengers departed Guernsey on a cruise or yacht trip in 2023, 102,920 people, 14% higher than 2022 but 22% lower than 2019.

Figure 2.2.1 Passenger volumes by destination

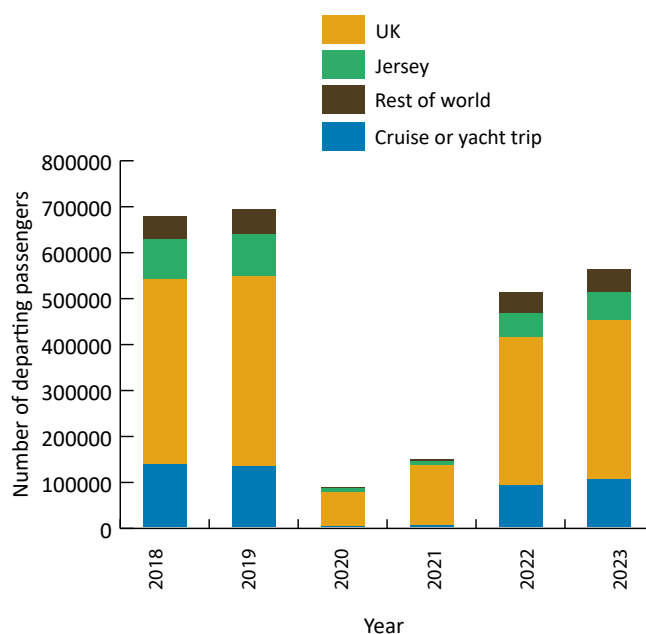


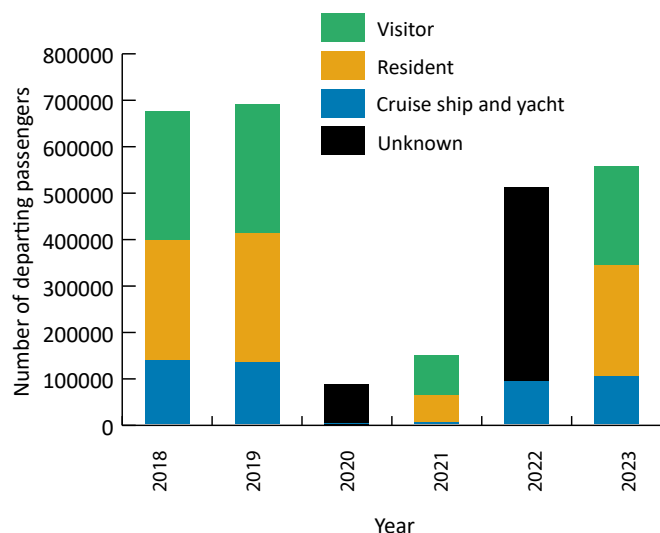
Table 2.2.1 Passenger volumes by destination

	2019	2020	2021	2022	2023	Annual % change	4 yr % change
Passengers departing Guernsey for United Kingdom	413,628	74,550	130,132	322,011	346,806	8%	-16%
Passengers departing Guernsey for Jersey	95,135	11,527	12,884	54,680	63,916	17%	-33%
Passengers departing Guernsey for rest of world	54,243	2,218	4,045	46,179	50,237	9%	-7%
Passengers departing Guernsey on cruise or yacht trip	131,922*	376*	3,369*	90,479*	102,920*	14%	-22%
Total departing passengers	694,928	88,671	150,430	513,349	563,879	10%	-19%

*Between Q4 2019 and Q2 2023 the number of people visiting by yacht was unknown, but the number has been inferred from the number of visiting yachts and the average number of people each vessel typically has on board.

2.3 Passenger volumes - residents and visitors

Figure 2.3.1 Passenger volumes - visitors and residents



Data is collected from passengers departing by aeroplane or ferry via a short interview-style survey. 11% of departing passengers were surveyed in 2023 (stratified by destination and port), which provides statistics with 95% confidence that they are accurate to within 1%. Survey results are applied to overall passenger volumes to give figures for the whole year.

One of the questions asked is whether travellers are resident in Guernsey or a visitor to the Island. It should be noted that within this Bulletin, Herm, Sark and Alderney residents are classified as Visitors. They are only included in the analysis if they were in Guernsey “in transit” i.e. travelling via Guernsey to or from somewhere outside of the Bailiwick (along with residents of places outside the Bailiwick of Guernsey that were transiting through Guernsey on their way to or from a destination outside the Bailiwick).

Prior to March 2020 surveys were conducted at the airport and harbour to determine the composition of passengers. When restrictions were put in place to reduce the impact of COVID-19 these surveys were suspended and the breakdown of passengers could not be determined. When the Travel Tracker system was introduced in late 2020, a limited amount of information about passengers could again be collected. However this was discontinued in February 2022.

Table 2.3.1 Visitor and resident passenger volumes

	2019	2020	2021	2022	2023	4 yr % change
Residents departing Guernsey by aeroplane	233,869	-	44,848	-	192,367	-18%
Residents departing Guernsey by ferry	44,900	-	13,761	-	46,293	3%
Visitors departing Guernsey by aeroplane	179,506	-	65,467	-	135,609	-24%
Visitors departing Guernsey by ferry	102,075	-	22,985	-	81,509	-20%
Visitors departing Guernsey by cruise ship and yacht	131,922*	376*	3,369*	90,479*	102,920*	-22%
Total departing residents	278,770	-	58,609	-	238,660	-14%
Total departing visitors	413,503	-	91,821	-	320,038	-23%
Total visitors returning to Guernsey later	2,656	-	-	-	5,181	95%

*Between Q4 2019 and Q2 2023 the number of people visiting by yacht was unknown, but the number has been inferred from the number of visiting yachts and the average number of people each vessel typically has on board.

NB: Figures may not sum exactly to totals due to rounding.

2.3 Passenger volumes - residents and visitors

As shown in **Table 2.3.1** and **Figure 2.3.1**, 238,660 passengers, 42% of those departing Guernsey in 2023, were residents, whilst 57% of those departing Guernsey were visitors (320,038 passengers). Fewer than 1% (5,181 visitors) reported that they were returning to Guernsey later. In order to avoid duplication in sampling no further visitor information is collected from those passengers who report they are returning later and they are excluded from any subsequent analysis in this Bulletin.

At present, those departing on cruise ships or yachts are not asked to complete the same survey; within this report it is assumed that all passengers departing on cruise ships or yachts are visitors.

Figure 2.3.2 shows the volume of residents travelling by ferry and aeroplane each year. In 2023, 81%, 192,367 residents travelled by aeroplane, the remainder, 19%, 46,293 residents travelled by ferry. The number of residents travelling by aeroplane in 2023 was 18% lower than the number travelling by aeroplane in 2019. The number of residents travelling by ferry in 2023 was 3% higher than the number travelling by ferry in 2019.

Figure 2.3.3 shows the volume of visitors travelling by ferry, aeroplane, cruise ship/visiting yacht each year. In 2023, 42%, 135,609 visitors travelled by aeroplane, 25%, 81,509 visitors travelled by ferry and 32%, 102,920 people travelled by visiting yacht or cruise ship. The number of visitors travelling by aeroplane in 2023 was 24% lower than the number travelling by aeroplane in 2019. The number of visitors travelling by ferry in 2023 was 20% lower than the number travelling by ferry in 2019.

Figure 2.3.2 Resident passenger volumes

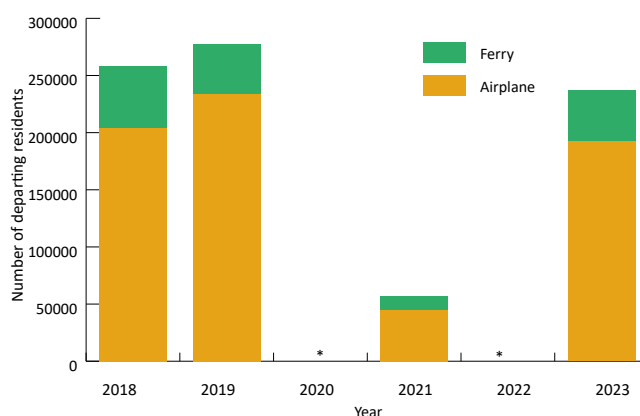
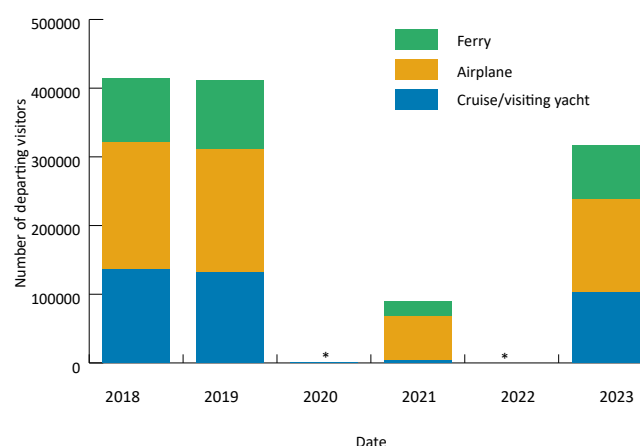


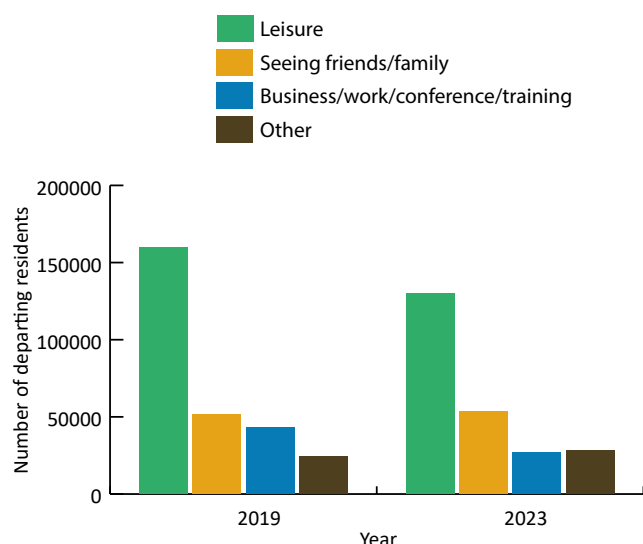
Figure 2.3.3 Visitor passenger volumes



*When restrictions were put in place to reduce the impact of COVID-19, surveys of exiting passengers at the airport and harbour were suspended between Q1 2020 and Q1 2023. A limited amount of passenger information was collected from the Travel Tracker system which was in place between Q4 2020 and Q4 2021. In Q1 2023 exit surveys were re-instigated and full passenger breakdown could again be reported.

3.1 Residents - main purpose of trip away from Guernsey

Figure 3.1.1 Residents - main purpose of trip away from Guernsey



Data is collected from a stratified sample of passengers departing Guernsey by aeroplane or ferry via a short interview-style survey. One of the questions asked of residents is what the main purpose of their trip away is. Survey results are applied to overall passenger volumes to give figures for the whole year.

In 2023, 54%, 129,984 residents reported the main purpose of their trip away from Guernsey was for leisure, 19% lower than the 159,905 residents who reported they were travelling for leisure in 2019.

22% of all residents, 53,681 people cited they were seeing friends/family, 4% higher than the 51,668 who reported they were travelling to see friends/family in 2019.

11%, 26,852 residents were leaving on business (38% lower than the 43,076 in 2019) and 12%, 28,142 were leaving for other reasons (24,121 in 2019). Other reasons include residents travelling for medical/hospital purposes, residents participating in sport and residents on a school trip/visit.

Table 3.1.1 Residents - main purpose of trip away from Guernsey

	2019	2023	4 yr % change
Leisure (e.g. holiday/vacation/break)	159,905	129,984	-19%
Seeing friends/family (including weddings, funerals etc)	51,668	53,681	4%
Business/work/conference/training	43,076	26,852	-38%
Other	24,121	28,142	17%
Total	278,770	238,660	-14%

NB: Figures may not sum exactly to totals due to rounding.

3.2 Residents - destination and length of trip away from Guernsey

Passenger exit survey questions include asking residents what their destination port is, whether this is their final destination port and how many nights they plan to spend away from the Island. Survey results are applied to overall passenger volumes to give figures for the whole year.

The majority, 76% of residents, 181,015 people were travelling to the UK in 2023, (in 2019 the equivalent figure was 76% of residents and 212,989 people).

13% of residents travelled to Jersey, 31,567 people; for 2019 this was 18% of residents and 51,386 people. The number of residents travelling to Jersey during 2023 was 39% lower than for 2019.

11% of residents, 26,078 people travelled elsewhere during 2023 (5%, 14,395 residents travelled elsewhere in 2019). The number of residents travelling elsewhere during 2023 was 81% higher than 2019.

Day trips accounted for 7% of all residents' trips during 2023. The average length of trip by residents during 2023 was 7 nights.

Figure 3.2.1 Residents - destination port 2019

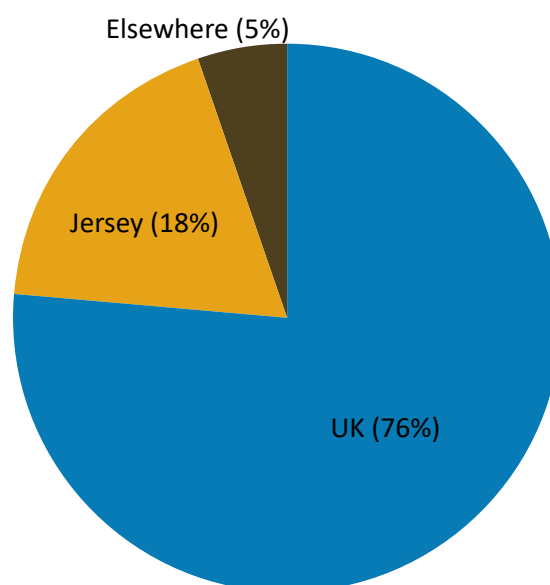


Figure 3.2.2 Residents - destination port 2023

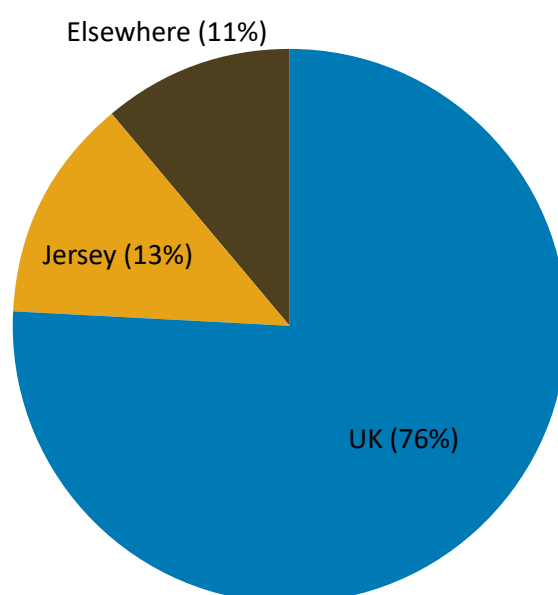


Table 3.2.1 Residents - destination port

	2019	2023	4 yr % change
United Kingdom	212,989	181,015	-15%
Jersey	51,386	31,567	-39%
Rest of world	14,395	26,078	81%
Total	278,770	238,660	-14%

NB: Figures may not sum exactly to totals due to rounding.

4.1 Visitors - main purpose of trip to Guernsey

Figure 4.1.1 Visitors - main purpose of trip to Guernsey

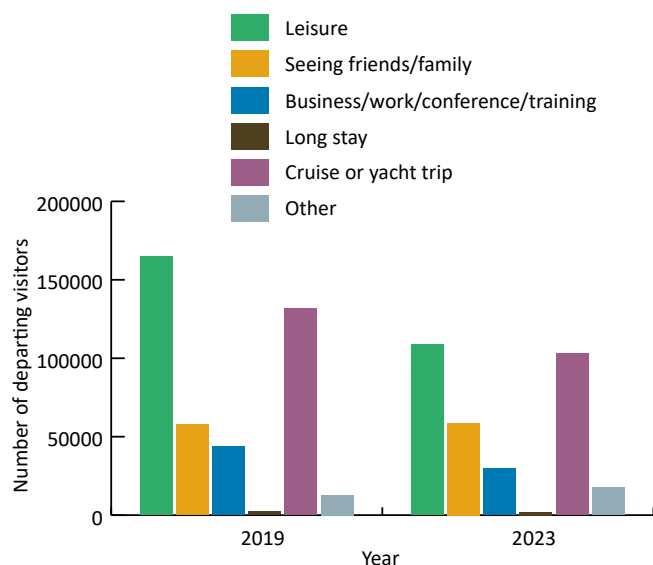


Table 4.1.1 Visitors - main purpose of trip to Guernsey

	2019	2023	4 yr % change
Leisure (e.g. holiday/vacation/break)	165,004	108,971	-34%
Seeing friends/family (including weddings, funerals etc)	57,792	58,649	1%
Business/work/conference/training	43,819	29,839	-32%
Long stay (more than 30 nights but less than 1 year for work/other purpose)	2,120	2,003	-6%
Cruise or yacht trip*	131,922	102,920	-22%
Other	12,845	17,656	37%
Total	413,503	320,038	-23%

*Between Q4 2019 and Q2 2023 the number of people visiting by yacht was unknown, but the number has been inferred from the number of visiting yachts and the average number of people each vessel typically has on board.

NB: Figures may not sum exactly to totals due to rounding.

One of the questions asked of visitors during passenger exit surveys is what the main purpose of their trip to Guernsey is. Survey results are applied to overall passenger volumes to give figures for the whole year. At present, those departing on cruise ships or yachts are not asked to complete the same survey, but the overall number of these visitors is still included in this section for completeness.

In 2023, 108,971 visitors reported the main purpose of their trip to Guernsey was for leisure (165,004 in 2019). 58,649 visitors cited they were seeing friends/family (57,792 in 2019), 29,839 were here for business (43,819 in 2019) and 17,656 were here for other reasons (12,845 in 2019). Other reasons include visitors to Guernsey in transit, visitors on a school trip/visit, visitors in Guernsey for medical/hospital purposes and visitors participating in sport. During July 2023 Guernsey hosted the Natwest International Island Games XIX. A corresponding increase can be seen in the number of people visiting for 'Other' reasons; the category which includes sports.

102,920 visitors to Guernsey during 2023 visited by yacht or cruise ship. 2,003 visitors during 2023 were long stay visitors, having stayed more than 30 nights but less than 1 year. The majority of long stay visitors were in Guernsey for work reasons.

4.2 Visitor Survey* - what attracted leisure visitors to Guernsey

Leisure visitors (357 respondents in the survey in 2023) were asked “Which of the following attracted you to visit Guernsey?”. Percentages do not add up to 100% for this question as respondents were able to select more than one option. 85% of all leisure visitors in 2023 cited that the natural beauty of the Island and its beaches attracted them to Guernsey, the second most popular reason was the history and heritage (54% of respondents) and the third most popular reason was the climate (40% of respondents), with accommodation, food and drink cited by 38% of respondents, as shown in **Figure 4.2.1**.

Leisure visitors were asked “To what extent did promotion of Guernsey influence your decision to visit?”. 27% of respondents reported that recommendation from friend(s)/family member(s) had a big influence on their decision to visit Guernsey. 11% of respondents reported that the visitguernsey.com website advertising the Islands of Guernsey had a big influence on their decision. Radio advertising and poster/ billboard advertising were the least influential on leisure visitors’ decisions to visit Guernsey during 2023; 96% of respondents reported these promotions had no influence, as shown in **Figure 4.2.2**.

Figure 4.2.1 Which of the following attracted you to visit Guernsey?

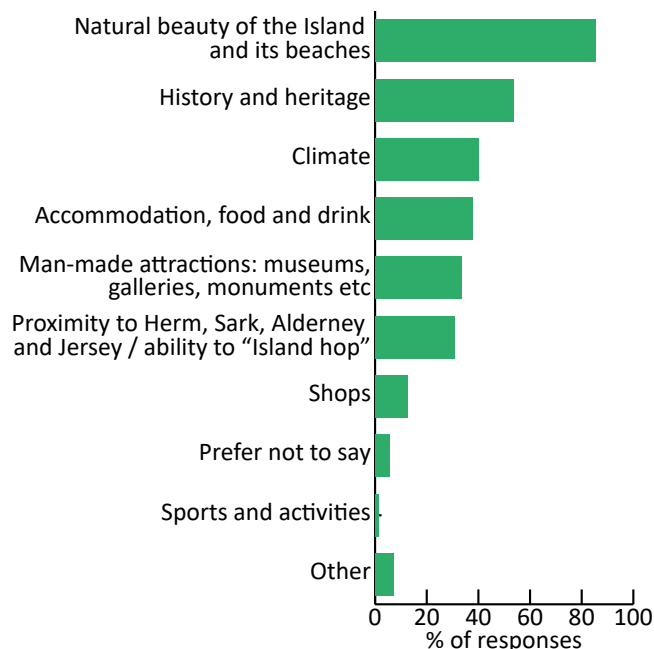
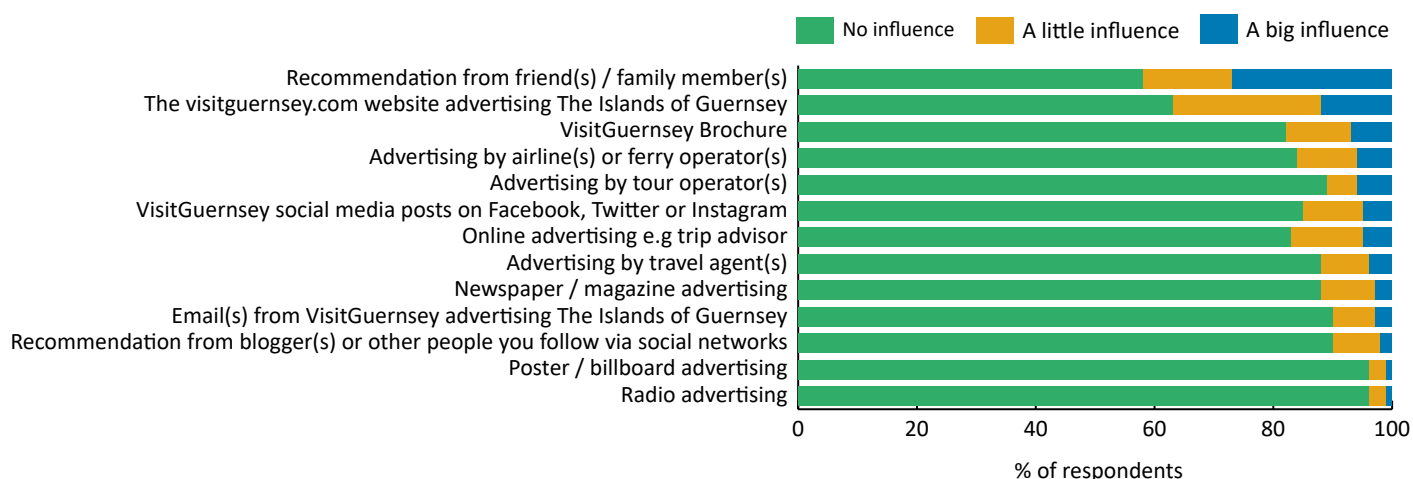


Figure 4.2.2 To what extent did promotion of Guernsey influence your decision to visit?



*See Methodology section for more information on the Visitor Survey; a separate online survey which a small portion of visitors opted to complete after completing the exit survey.

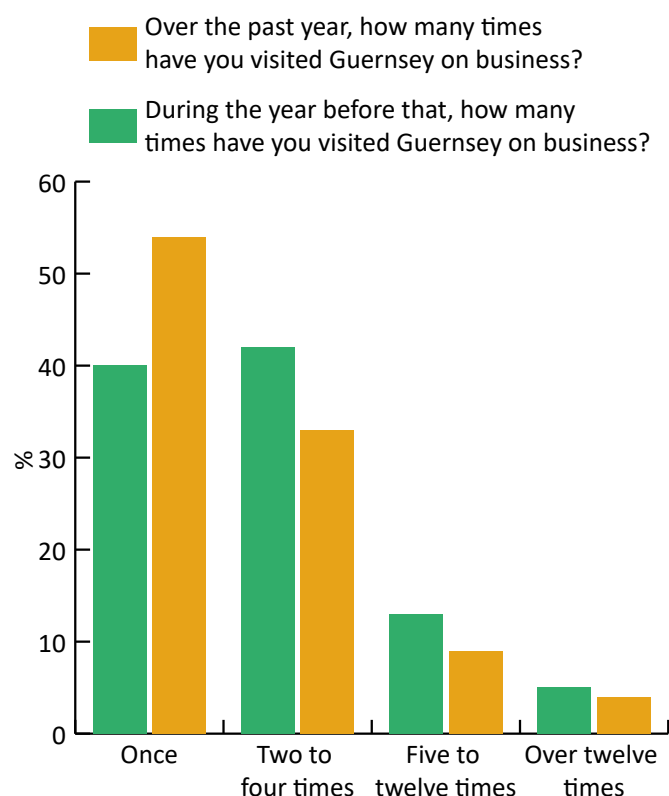
4.3 Visitor Survey* - what brought business travellers to Guernsey

Table 4.3.1 When you visited Guernsey, what type of business were you undertaking?

	2023
Small meeting, board meeting or similar	46%
Large meeting, conference or similar	4%
Exhibition	2%
Team building / away day	0%
Collection or delivery of goods or papers	2%
Repair or maintenance work	14%
Other	32%

Business travellers (88 respondents) were asked “*When you visited Guernsey, what type of business were you undertaking?*”. 46% were attending a small meeting, board meeting or similar and 14% were undertaking repair or maintenance work, as shown in **Table 4.3.1**. Of the 32% of business travellers who stated they were in Guernsey for other purposes, reasons given included for training and teaching purposes, to work at the hospital or in schools and to undertake building work. Please note the analysis on business travellers presented on this page is based on small sample sizes.

Figure 4.3.1 Frequency of business trips to Guernsey in 2023 and 2022



Business travellers were asked “*How many times have you visited Guernsey in the past year on business?*” An additional follow-up question was asked; “*How many times have you visited Guernsey on business during the year before that?*”

In the past year, 40% of business travellers had visited Guernsey once on business, compared with 54% the previous year, as shown in **Figure 4.3.1**. 42% of business travellers in 2023 had visited Guernsey two to four times on business, compared with 33% the previous year. 13% of business travellers in 2023 had visited Guernsey five to twelve times on business; in the previous year it was 10%. 5% of business travellers in the past year had visited Guernsey over twelve times on business, compared with 4% the previous year. As previously mentioned, these percentages should be treated with caution as they are based on a small sample.

*See Methodology section for more information on the Visitor Survey; a separate online survey which a small portion of visitors opted to complete after completing the exit survey.

4.4 Visitors (all) - country of residence and length of stay

Another of the questions asked of visitors during passenger exit surveys is their country of residence. Survey results are applied to overall passenger volumes to give figures for the whole year.

At present, those departing on cruise ships or yachts are not asked to complete the same survey, but the overall number of these visitors is still included in this section for completeness.

During 2023, 48% of all visitors, 154,664 people reported their country of residence was the UK (45%, 186,954 in 2019). 5%, 14,893 visitors were from France (7%, 29,829 in 2019). 6%, 18,207 visitors were from Jersey (5%, 20,698 in 2019), 9%, 29,354 visitors were from the Rest of the world (11%, 44,099 in 2019), and 32%, 102,920 visitor's country of residence was unknown, as they were visiting by cruise ship or yacht (32%, 131,922 in 2019).

In 2023 there were 17% fewer visitors who reported their country of residence was the UK, when compared to 2019. 12% fewer visitors from Jersey, 50% fewer visitors from France and 33% fewer visitors from the Rest of the world, when compared to 2019.

During 2023, 36,266 people visited Guernsey on a day trip, representing 11% of all visitors (48,297 people, 12% in 2019). The majority, 56% of visitors, 178,849 people, stayed at least one night but less than 31 nights (231,164 people, 56% in 2019). During 2023 less than 1% of visitors were long stay visitors (2,003 people).

Comparison between 2023 and 2019 reveals that in 2023 there were 25% fewer visitors on a day trip, 23% fewer visitors staying at least one night (but less than 31 nights) and 6% fewer long stay visitors, compared with 2019.

The average length of stay for visitors staying at least one night but less than 31 nights was 4.9 nights in 2023, equating to 871,884 bed nights, and compares with 4.7 nights, and 1,085,386 bed nights in 2019.

Table 4.4.1 Visitors - country of residence

	2019	2023	4 yr % change
United Kingdom	186,954	154,664	-17%
Jersey	20,698	18,207	-12%
France	29,829	14,893	-50%
Rest of world	44,099	29,354	-33%
Unknown (cruise ship and yacht passengers)*	131,922	102,920	-22%
Total	413,503	320,038	-23%

*Between Q4 2019 and Q2 2023 the number of people visiting by yacht was unknown, but the number has been inferred from the number of visiting yachts and the average number of people each vessel typically has on board.
NB: Figures may not sum exactly to totals due to rounding.

Table 4.4.2 Visitors - length of stay in Guernsey

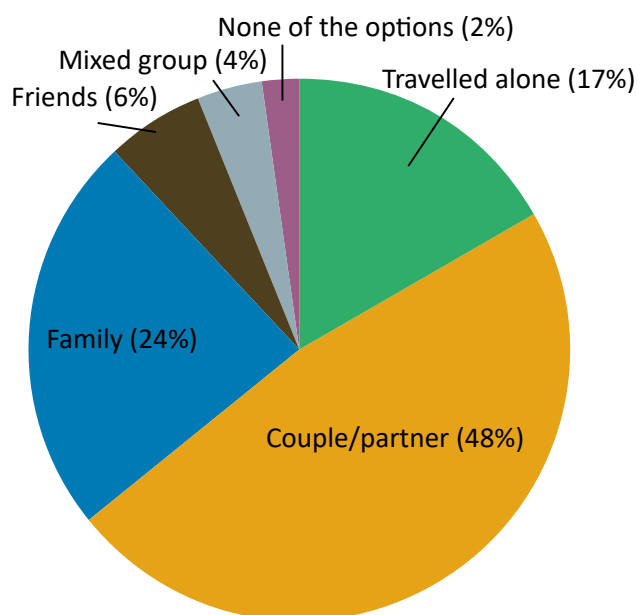
	2019	2023	4 yr % change
Day trip to Guernsey	48,297	36,266	-25%
Staying on a cruise ship or yacht*	131,922	102,920	-22%
Staying at least one night in Guernsey (but 30 or less nights)	231,164	178,849	-23%
Long stay (more than 30 nights but less than 1 year)	2,120	2,003	-6%
Total	413,503	320,038	-23%

*Between Q4 2019 and Q2 2023 the number of people visiting by yacht was unknown, but the number has been inferred from the number of visiting yachts and the average number of people each vessel typically has on board.

NB: Figures may not sum exactly to totals due to rounding.

4.5 Visitor Survey* - age and composition of groups of leisure visitors and those seeing friends and family

Figure 4.5.1 Leisure visitors and those seeing friends and family - composition of group during 2023



Based on responses to the online Visitor Survey, in 2023, 17% of leisure visitors and those seeing friends and family travelled alone, 48% travelled to Guernsey as a couple or with their partner and 24% travelled with their family, as shown in **Figure 4.5.1**. Mixed group refers to a mixture of either a couple/partner, family and/or friends.

Respondents were also asked the age profile of their party in terms of the number of people in each age band. Over half of visitors during 2023 were aged 55 years and above (51%); notably 25% of visitors were aged between 55 years and 64 years and 17% were aged between 65 and 74 years. 13% of visitors were aged under 25 years, as shown in **Table 4.5.1**.

Table 4.5.1 Leisure visitors and those seeing friends and family - percentage of visitors by age band during 2023

	% of leisure visitors and those seeing friends and family
14 and under	6%
15 to 24	6%
25 to 34	12%
35 to 44	10%
45 to 54	14%
55 to 64	25%
65 to 74	17%
Over 74	9%

NB: Includes all visitors in party, not just the survey respondent. Figures may not sum exactly to totals due to rounding.

*See Methodology section for more information on the Visitor Survey; a separate online survey which a small portion of visitors opted to complete after completing the exit survey.

4.6 Visitors - accommodation of staying visitors

Visitors who stayed in Guernsey overnight are asked an extra question about the type of accommodation they stayed in as part of the exit survey. Survey results are applied to overall passenger volumes to give figures for the whole year. Those visitors staying in Guernsey more than 30 nights (long stay) are excluded from this analysis.

As shown in **Figure 4.6.1**, **Figure 4.6.2** and **Table 4.6.1**, in 2023, 61% of all visitors staying in Guernsey stayed in hotels, (108,667 people), 25% stayed with friends/family (44,892 people) and 14% stayed in other accommodation (25,290 people). The other category includes guest houses, any accommodation listed on Airbnb or other online booking portals, self-catering units and campsites etc. Comparison between 2023 and 2019 reveals that in 2023 there were 24% fewer visitors staying in hotels, 15% fewer visitors staying in friend/family's homes and 29% fewer visitors staying in Other accommodation, compared with 2019.

On average visitors in hotels stayed 4.2 nights in 2023 and equates to 452,101 bed nights. During 2023 the average length of stay with friends/family was 5.5 nights, equating to 248,505 bed nights and the average length of stay in Other (which includes guest houses, any accommodation listed on Airbnb or other online booking portals, self-catering units and campsites etc) was 5.9 nights equating to 149,189 bed nights.

Figure 4.6.1 Accommodation for staying visitors 2019

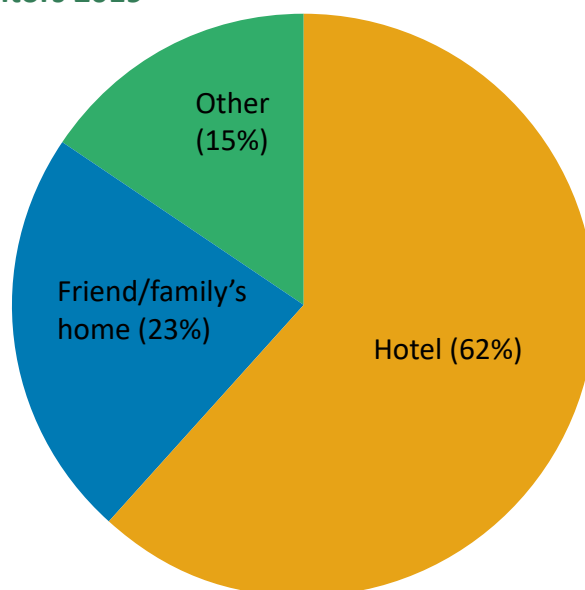


Figure 4.6.2 Accommodation for staying visitors 2023

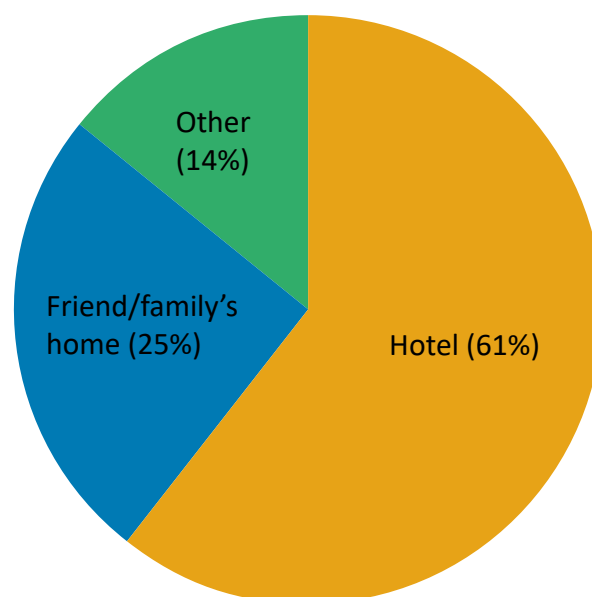


Table 4.6.1 Accommodation for staying visitors

	2019	2023	4 yr % change
Hotel	143,090	108,667	-24%
Friend/family's home	52,646	44,892	-15%
Other (including guest houses, accommodation listed on Airbnb or other online booking portals, self-catering units and campsites etc)	35,428	25,290	-29%
Total staying visitors	231,164	178,849	-23%

5.1 Visitor accommodation - capacity

Figure 5.1.1 Visitor accommodation capacity

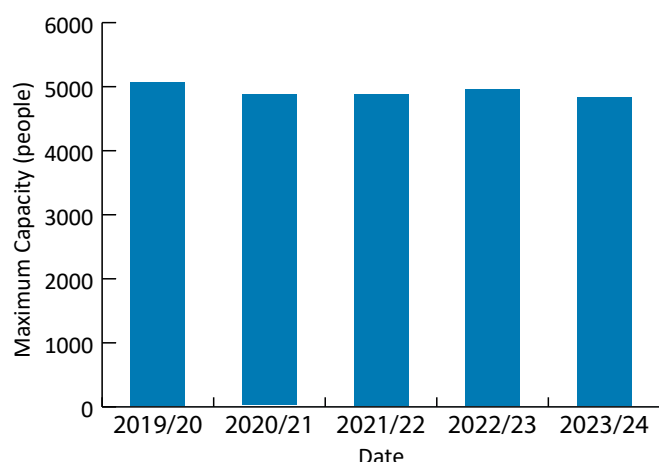


Table 5.1.1 Visitor accommodation capacity

	2019 /20	2020 /21	2021 /22	2022 /23	2023 /24
Maximum capacity (people)	5,055	4,854	4,863	4,938	4,818
Temporarily unavailable capacity e.g. closed for refurbishment	0	0	0	120	201
Total (including temporarily unavailable)	5,055	4,854	4,863	5,058	5,019

NB: 2023/24 Visitor accommodation capacity differs slightly to that published in the Q1 2023 Travel and Visitor Accommodation Bulletin, as the renewal process for 2023/24 was not complete at the time of the Q1 2023 publication.

Table 5.1.2 Additional summer capacity

	2023
Maximum additional capacity (people)	320
Additional number of units (equipped tents, log cabins, yurts, shepherd's huts etc)	60

The visitor accommodation capacity in Guernsey and Herm can be monitored over time through the number of accommodation providers with active permits each year and the maximum capacity of each accommodation provider, as shown in **Figure 5.1.1** and **Table 5.1.1**.

Visitor accommodation capacity shows the maximum number of people that could be accommodated in permanent building structures, such as hotels, guest houses, hostels, self-catering units and other similar accommodation with an active boarding permit. Temporary structures, such as those provided by accommodation providers for glamping and camping are excluded from the capacity (for comparability with other jurisdictions). It should be noted that the capacity reported does not include accommodation that is publicly advertised (for example, via airbnb.co.uk or other booking portals), but does not have an active boarding permit.

The maximum capacity of accommodation providers with an active boarding permit for the 2023 summer season and winter 2023/24 was 4,818, as shown in **Table 5.1.1**; a 2% decline from 2022/23 and a 5% decline from 2019/20. Capacity for 201 more people was removed during 2022 and 2023, but part or all of this capacity is expected to be added back in once refurbishments have completed.

Each summer there is additional visitor accommodation provided by the campsites of Guernsey and Herm. **Table 5.1.2** indicates the maximum additional capacity provided by temporary glamping and camping structures during the summer season. For summer 2023, an additional 320 people can be accommodated in 60 units which include equipped tents, cabins, yurts and shepherd's huts. These figures do not include camping/motorhome pitches where visitors provide their own accommodation. The additional summer capacity will be recorded each year so trends in summer capacity can be monitored going forwards.

5.2 Visitor accommodation - availability

Each month, visitor accommodation providers with active permits are asked to provide data on the availability and occupancy of their accommodation units. The responses received during 2023 include different accommodation types and sizes and statistics for these months are accurate to at least plus or minus 3% (at a confidence level of 95%). The responses are scaled up by the total amount of visitor accommodation (with both an active boarding permit and an aligned building use type) in order to give figures for the whole Island. 2022/23 boarding permit information was used to scale up the figures for the first quarter of 2023. 2023/24 boarding permit information was used to scale up the figures for the second, third and fourth quarters of 2023.

Units are classified as not available for booking *only* if the whole site is closed; either seasonally (in a regular pattern) or for six months or more (for refurbishment, for example). Units are added into or taken out of the total (sum of open and closed units) if a site's use is officially changed via a successful planning application or if there have been physical changes to building(s).

Occupancy (see next page) is calculated as a proportion of the available units in each month i.e. a proportion of those that could be booked.

This approach is in alignment with methods used in other jurisdictions.

This information is only available from 2023 onwards, following changes to the way data is collected from accommodation providers.

Table 5.2.1 and **Figure 5.2.1** show that there were 1,902 visitor accommodation units in Q4 2023. During Q4 2023 there were a number of visitor accommodation seasonal closures. The proportion of visitor accommodation units available to be booked was 98%, 93% and 92% in October 2023, November 2023 and December 2023 respectively.

Table 5.2.1 Availability of visitor accommodation

	Number of units available to be booked	Number of units not available to be booked	Total number of units
Jan 2023	1,745	329	2,074
Feb 2023	1,775	299	2,074
Mar 2023	2,031	43	2,074
Apr 2023	1,902	0	1,902
May 2023	1,902	0	1,902
Jun 2023	1,902	0	1,902
Jul 2023	1,902	0	1,902
Aug 2023	1,902	0	1,902
Sep 2023	1,902	0	1,902
Oct 2023	1,858	44	1,902
Nov 2023	1,764	138	1,902
Dec 2023	1,744	158	1,902

Figure 5.2.1 Availability of visitor accommodation



NB: Availability and occupancy (on the next page) are presented as numbers of units of visitor accommodation, since bookings are taken per whole unit, rather than per number of people to be accommodated in the unit(s). The number of units includes each hotel, guest house and hostel room plus each self-catering unit (including those listed on Airbnb or other online booking portals) with an active boarding permit. Glamping and camping units are not included within availability and occupancy statistics for alignment with methods used in other jurisdictions.

5.3 Visitor accommodation - occupancy

Figure 5.3.1 Occupancy of open/available accommodation units

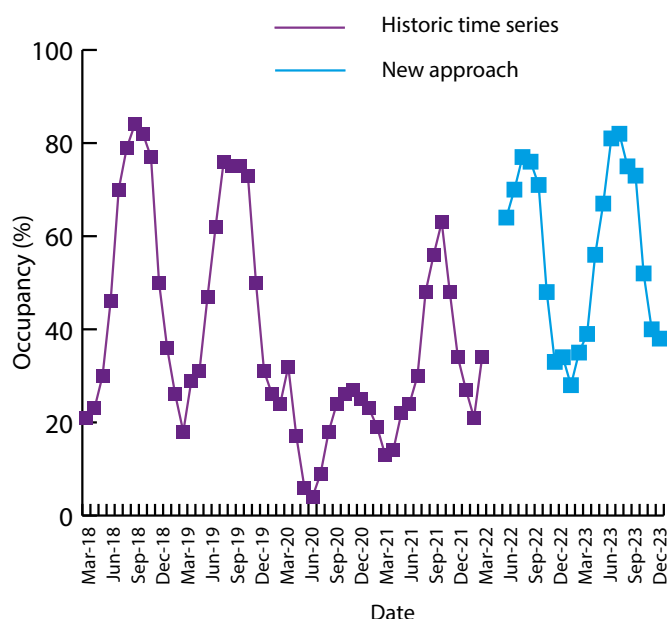


Table 5.3.1 Occupancy of open/available accommodation units

	2019	2020	2021	2022	2023
January	18%	24%	19%	21%	28%
February	29%	32%	13%	34%	35%
March	31%	17%	14%	*	39%
April	47%	6%	22%	*	56%
May	62%	4%	24%	64%	67%
June	76%	9%	30%	70%	81%
July	75%	18%	48%	77%	82%
August	75%	24%	56%	76%	75%
September	73%	26%	63%	71%	73%
October	50%	27%	48%	48%	52%
November	31%	25%	34%	33%	40%
December	26%	23%	27%	34%	38%

*There was a wave of cases of the Omicron variant of COVID-19, which impacted on the ability to collect full data in March and April 2022.

As shown in **Figure 5.3.1**, there is usually a seasonal pattern in occupancy, with peaks in July, August or September and troughs in January each year. This pattern was severely disrupted in 2020 during the COVID-19 pandemic, but can be seen again in 2021 and 2022.

COVID-19 related requirements were put in place for people travelling into Guernsey in February 2020 and remained in place throughout 2021 with no non-essential travel allowed between 12th March 2020 and 20th May 2020 or between 14th January 2021 and 22nd March 2021. The requirements varied depending on the country of origin and vaccination status of the traveller. All COVID-19 related travel restrictions were lifted on 17th February 2022.

Temporary planning exemptions were introduced during the COVID-19 pandemic. From 25th March 2020, providers of visitor accommodation have been permitted to accommodate non-visitors and long-stay residents all year round, provided that the establishments revert to their usual use for visitor accommodation once the temporary exemptions cease to apply (on 31st December 2023). Exemptions allowing long-stay visitors would normally apply only to self-catering establishments during the Winter Let period from 1st November to 31st March each year. There was a wave of cases of the Omicron variant of COVID-19, which impacted on the ability to collect full data in March and April 2022.

Occupancy of open units increased in 2023 from 28% in January 2023 to a peak of 82% in July 2023, then showed a continued monthly decline to 38% in December 2023. The average occupancy of open units for 2023 was 56%.

Additional information began being collected in June 2023, which makes it possible to determine long stay occupancy. Long stay occupancy was highest in December 2023, when 34% of open units were occupied by long-stay guests and lowest in July 2023 when 2% of open units were occupied by long stay guests.

6.1 Visitor Survey* - how staying visitors rated their accommodation

Visitors in Guernsey for business, leisure or seeing friends and family and other reasons staying in commercial accommodation in 2023 (555 respondents) were asked a number of questions regarding their accommodation whilst staying on Island. Results have been weighted by purpose of visit data from exit interviews to ensure that survey responses are representative of all visitors.

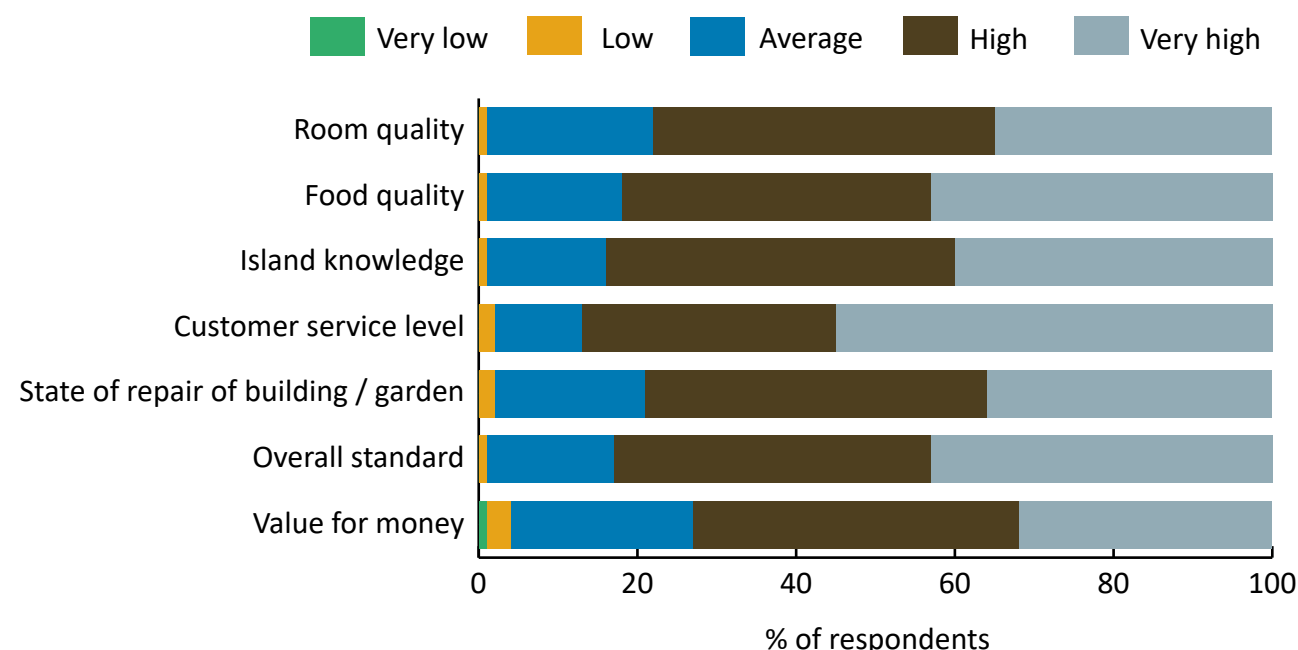
During 2023, 87% of visitors reported that the customer service level at their accommodation was high or very high. 84% of visitors reported that Island knowledge and the overall standard of accommodation was high or very high. 81% reported that the food quality at their accommodation was high or very high. 79% of visitors reported that the state of repair of building / garden was high or very high. 78% reported the room quality of their accommodation was high or very high. 74% of visitors reported that the value for money of their accommodation was high or very high, whilst 3% reported that it was low, as shown in **Table 6.1.1** and **Figure 6.1.1**.

Table 6.1.1 Please rate the following regarding your accommodation:

	Very low	Low	Average	High	Very high
Room quality	0%	1%	21%	43%	35%
Food quality	0%	1%	17%	39%	42%
Island knowledge	0%	1%	15%	44%	40%
Customer service level	0%	2%	11%	32%	55%
State of repair of building / garden	0%	2%	19%	43%	36%
Overall standard	0%	1%	16%	40%	44%
Value for money	1%	3%	23%	41%	33%

NB: Figures may not sum exactly to totals due to rounding. Results have been weighted by purpose of visit to ensure they are representative of all visitors.

Figure 6.1.1 Please rate the following regarding your accommodation:



*See Methodology section for more information on the Visitor Survey; a separate online survey which a small portion of visitors opted to complete after completing the exit survey.

6.2 Visitor Survey* - how and when leisure visitors and those seeing friends and family booked their accommodation

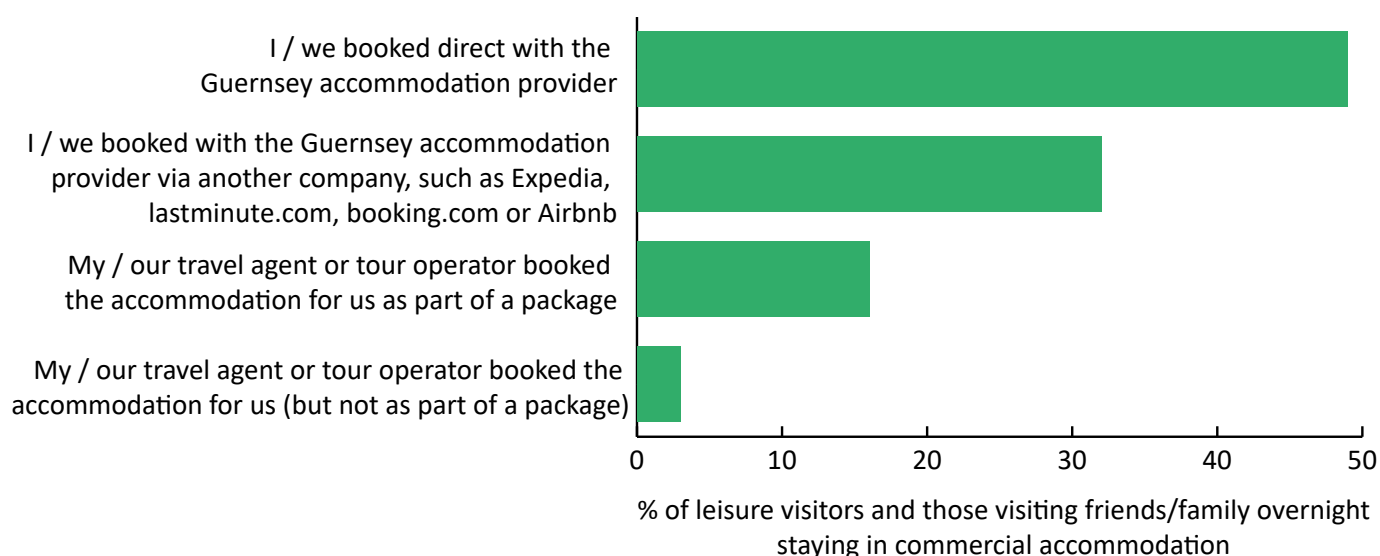
Table 6.2.1 When did you book your accommodation in Guernsey?

	2023
On arrival in Guernsey	0%
Less than 7 days before arriving	4%
7 to 13 days before arriving	5%
Between 14 days and 1 month before arriving	10%
1, 2 or 3 months before arriving	41%
4, 5 or 6 months before arriving	26%
Over 6 months before arriving	14%

Leisure visitors and those visiting friends/family who stayed overnight in commercial accommodation (434 respondents) were asked, "How did you book your accommodation in Guernsey?" Almost half of all respondents to this question during 2023, 49%, booked their accommodation direct with the Guernsey accommodation provider, as shown in **Figure 6.2.1**. 32% used another company such as Expedia, lastminute.com or booking.com to book their accommodation and 16% booked their accommodation through a tour operator as part of a package.

During 2023, 41% of leisure visitors and those visiting friends/family who stayed in hotels, guest houses, accommodation listed on Airbnb and similar online portals, self-catering units and campsites booked their accommodation in Guernsey 1, 2 or 3 months before arriving, whilst 26% booked accommodation between 4, 5 or 6 months before arriving, as shown in **Table 6.2.1**. Only 14% of visitors during 2023 booked more than 6 months before arriving. 19% of visitors booked their accommodation less than 1 month before arriving, during 2023.

Figure 6.2.1 How did you book your accommodation in Guernsey?



*See Methodology section for more information on the Visitor Survey; a separate online survey which a small portion of visitors opted to complete after completing the exit survey.

6.3 Visitor Survey* - how much leisure visitors and those seeing friends and family spent on their visit

Leisure visitors and those visiting friends/ family were asked “In total, how much did you and any other people you travelled with spend on your visit to Guernsey (including travel and accommodation)?” Please note visitor spend, as reported here, is on behalf of the party and not individual spend. The average party size of respondents to the Visitor survey during 2023 was 2 people. 32% of respondents reported their party spent £1,500 or more on their trip (including travel and accommodation), a quarter reported their party spent between £1,000 and £1,499 on their trip, 17% spent between £750 and £999, 14% spent £500 to £749 and 10% spent £250 to £499. Only 3% of respondents reported their party spent less than £250 on their trip, as shown in **Figure 6.3.1**. Average length of stay for visitors during 2023, as reported in **Section 4.4**, was 4.9 nights.

Leisure visitors and those visiting friends and family who stayed overnight in commercial accommodation responding to the survey in 2023 (434 respondents) were asked to rate aspects of their trip in terms of value for money, as shown in **Figure 6.3.2**. 81% of respondents rated attractions as good or very good value for money, 80% rated transport and/or vehicle hire as good or very good value for money, 71% rated organised tours and/or activities as good or very good value for money, 67% rated eating/drinking out as good or very good value for money and 56% of respondents rated travel to and from the Island as good or very good value for money.

Figure 6.3.1 In total, how much did you and any other people you travelled with spend on your visit to Guernsey (including travel and accommodation)?

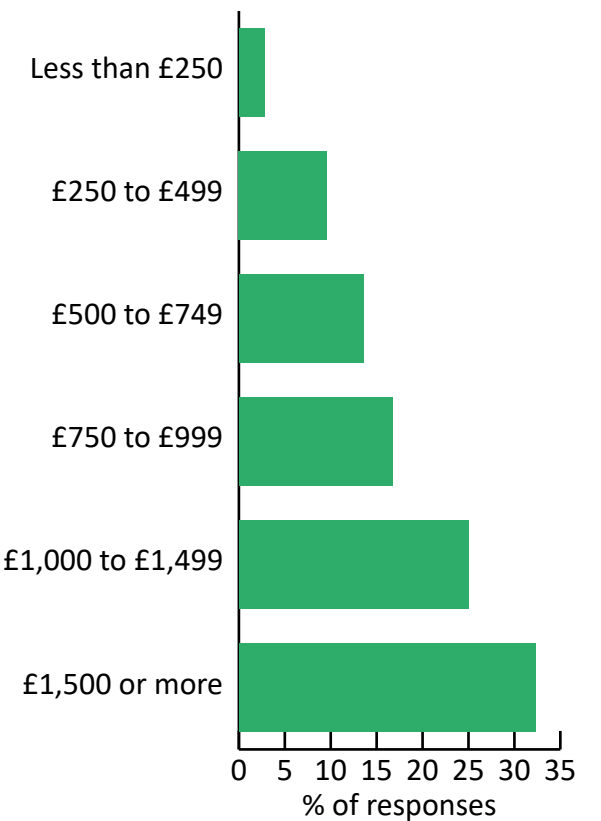
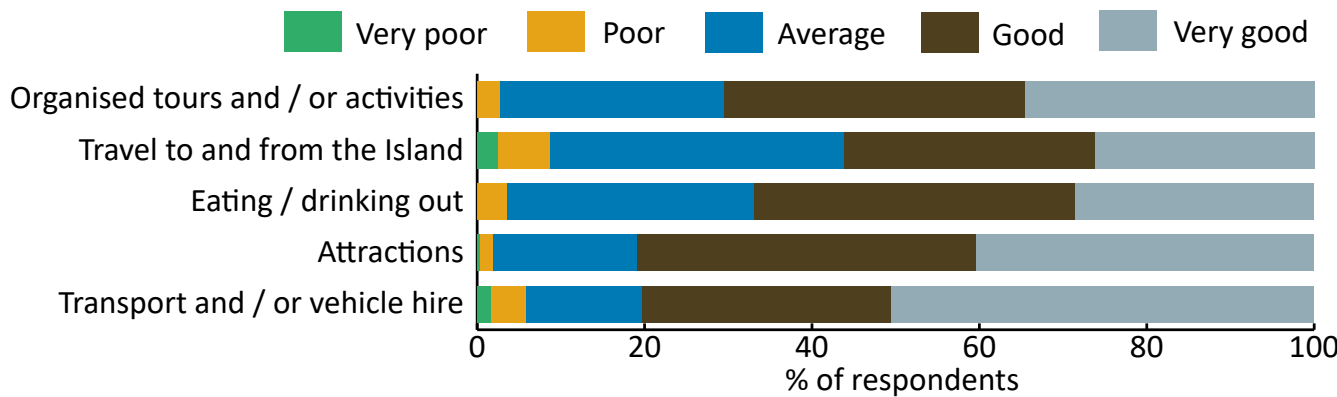


Figure 6.3.2 How would you rate each of the following in terms of value for money?



*See Methodology section for more information on the Visitor Survey; a separate online survey which a small portion of visitors opted to complete after completing the exit survey.

6.4 Visitor Survey* - what leisure visitors and those seeing friends and family most and least enjoyed about their visit

Figure 6.4.1 What was the most enjoyable aspect of your trip?

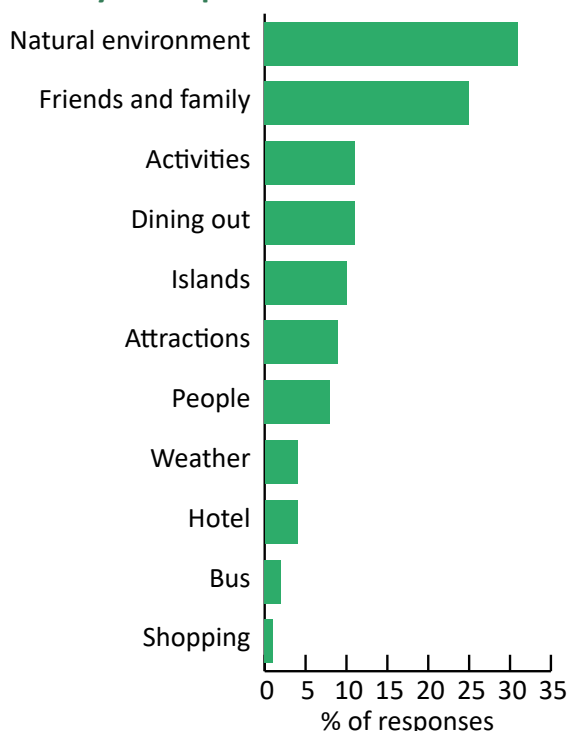
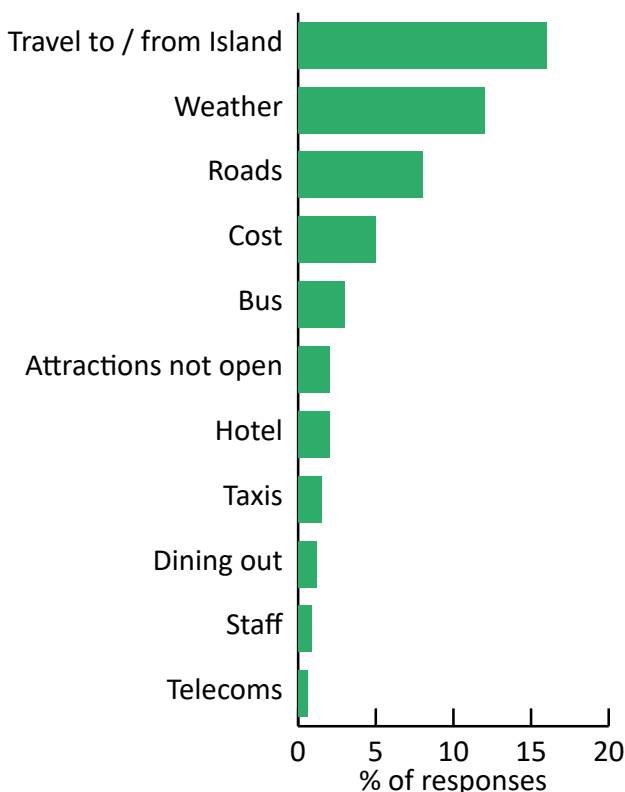


Figure 6.4.2 What was the least enjoyable aspect of your trip?



A free text question was asked of leisure visitors and those seeing friends and family “*What was the most enjoyable aspect of your trip?*” Answers to this question for 2023 have been grouped into themes. Percentages do not add up to 100% for this question as more than one reason could be provided. 31% of respondents said the most enjoyable aspect of their trip was the natural environment, with many citing the scenery, the beaches, the peacefulness, the beautiful coastlines and pretty lanes as a highlight. 25% reported seeing friends and family as the most enjoyable aspect. 11% reported the activities they undertook, including cycling, cliff walks and sea swimming, as the most enjoyable aspect of their trip. A further 11% of respondents mentioned dining out, with people enjoying the good selection of restaurants. 10% cited trips to the islands of Sark and Herm as the most enjoyable aspect and 9% of respondents cited the attractions of Guernsey (including Hauteville House, Castle Cornet, the Little Chapel, the Underground Hospital, the Occupation Museum and open air events such as the West Show and the Cobo balcony concerts).

An additional free text question was asked “*What was the least enjoyable aspect of your trip?*” Answers to this question for 2023 have been grouped into themes. 16% of respondents said travel to/from the Island was the least enjoyable aspect of their trip, with respondents citing delays and cancellations of aeroplanes and ferries, weather-related uncomfortable plane and ferry journeys, long queues for security at Guernsey and origin airports, and lack of direct travel links between Guernsey and their destination. 12% of respondents cited weather as the least enjoyable aspect. 8% mentioned roads, including road closures, diversions, volume of traffic, lack of pavements and the roads being difficult to navigate. A further 5% mentioned the cost of their trip, including the cost of travelling to the Island (specifically flights), dining out, car hire, the cost of activities, food, and accommodation.

*See Methodology section for more information on the Visitor Survey; a separate online survey which a small portion of visitors opted to complete after completing the exit survey.

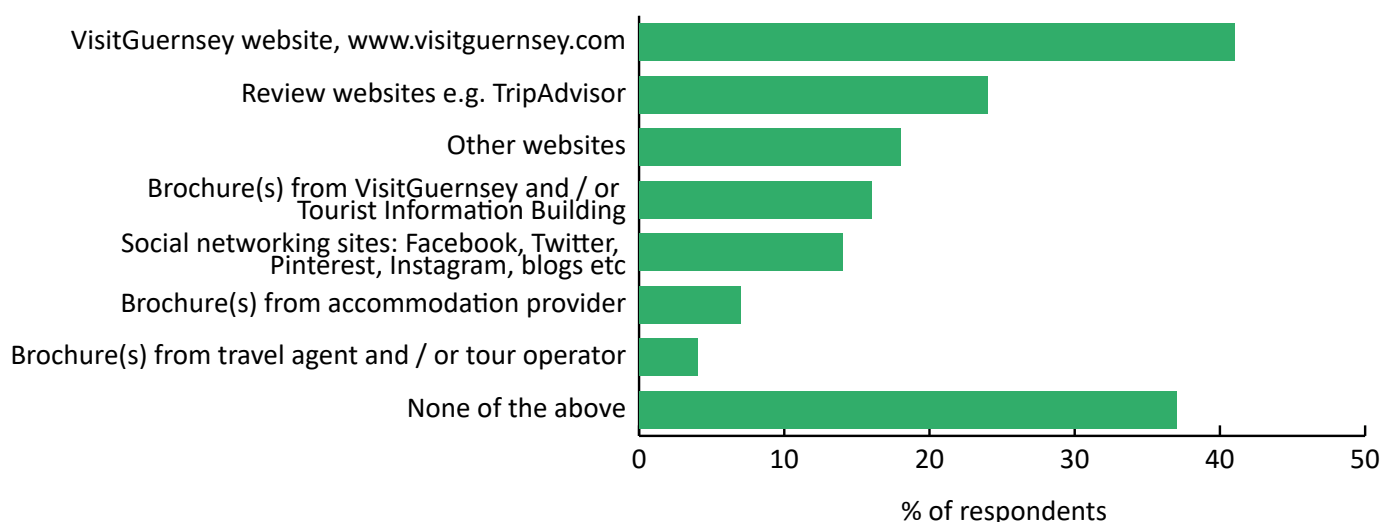
6.5 Visitor Survey* - how leisure visitors and those seeing friends and family planned their visit

Leisure visitors and those visiting friends and family were asked “*When you were planning your trip and things to do in Guernsey, which (if any) of the following did you use?*”. Percentages do not add up to 100% for this question, as respondents were able to select more than one option. Whilst 41% of visitors during 2023 used the VisitGuernsey website, and a further 24% and 18% used review websites like TripAdvisor and other websites, 37% used none of the options listed to plan their trip to Guernsey, as shown in **Table 6.5.1**.

Table 6.5.1 When you were planning your trip and things to do in Guernsey, which (if any) of the following did you use?

	2023
VisitGuernsey website, www.visitguernsey.com	41%
Review websites e.g. TripAdvisor	24%
Other websites	18%
Brochure(s) from VisitGuernsey and / or Tourist Information Building	16%
Social networking sites: Facebook, Twitter, Pinterest, Instagram, blogs etc	14%
Brochure(s) from accommodation provider	7%
Brochure(s) from travel agent and / or tour operator	4%
None of the above	37%

Figure 6.5.1 When you were planning your trip and things to do in Guernsey, which (if any) of the following did you use?



*See Methodology section for more information on the Visitor Survey; a separate online survey which a small portion of visitors opted to complete after completing the exit survey.

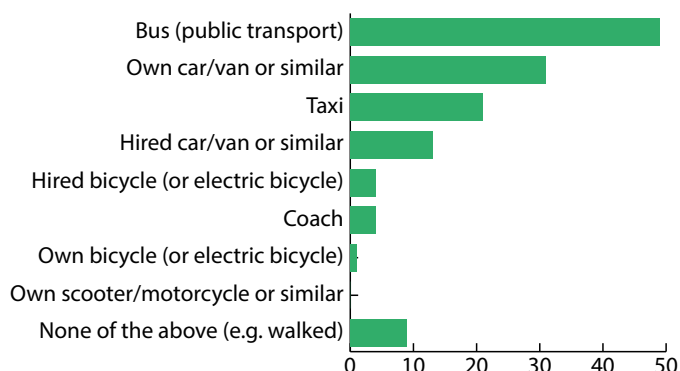
6.6 Visitor Survey* - activities undertaken and transport used (all except cruise and yacht visitors)

Table 6.6.1 Which of the following did you, or any of the people you travelled with, do during your stay in Guernsey?

	2023
Eating and/or drinking out	85%
Visiting sites of natural beauty (including beaches)	73%
Walking and/or running	66%
Shopping	61%
Visiting man-made attractions: museums, galleries, monuments etc	50%
Island hopping - visiting Herm, Sark and/or Alderney	34%
Sea swimming, snorkelling and/or diving	20%
Tour(s) by coach, landrover, petit train or boat	10%
Bird watching	9%
Other beach and sea activities such as: surfing, kayaking, paddle boarding	7%
Cycling	7%
Island hopping - visiting Jersey	5%
None of the above	2%

NB: Results have been weighted by purpose of visit to ensure they are representative of all visitors.

Figure 6.6.1 Which method of transport did you use during you visit to Guernsey?



NB: Results have been weighted by purpose of visit to ensure they are representative of all visitors.

All visitors responding to the online Visitor Survey were asked “Which of the following did you, or any of the people you travelled with, do during your stay in Guernsey?”, as shown in **Table 6.6.1**. Percentages do not add up to 100% for this question as respondents were able to select more than one option. Results have been weighted by purpose of visit to ensure the survey responses are representative of all visitors.

The most popular activity (undertaken by 85% of visitors leaving by aeroplane and ferry during 2023) was eating and/or drinking out, followed by visiting sites of natural beauty (including beaches) at 73% and walking and/or running, undertaken by 66% of respondents. The least popular activities undertaken by visitors were other beach and sea activities (7%), cycling (7%) and island hopping to Jersey (5%).

All visitors responding to the online survey were also asked “Which method(s) of transport did you use during your visit to Guernsey?”, as shown in **Figure 6.6.1**. Percentages do not add up to 100% for this question as respondents were able to select more than one option.

The most popular method of transport in 2023, used by 49% of all (excluding cruise and yacht) visitors was the bus, followed by own car/van or similar, at 31%, and taxis (used by 21% of visitors). Own scooter/motorcycle and own bicycle were the least popular methods of transport. 9% of visitors used no vehicular transport during their visit to Guernsey, instead choosing to walk.

*See Methodology section for more information on the Visitor Survey; a separate online survey which a small portion of visitors opted to complete after completing the exit survey.

7.1 Visitors (all except cruise and yacht visitors) - net promoter score

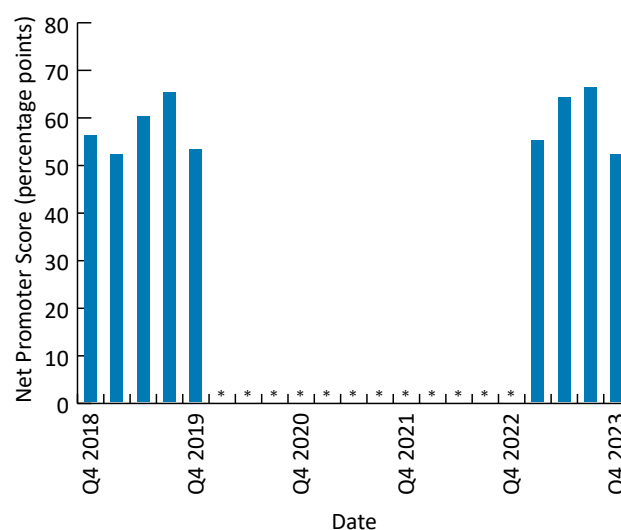
Visitors leaving the Island by aeroplane or ferry are asked how likely they would be to recommend Guernsey to a friend or relative (as a score out of 10, with 10 meaning very likely) as part of the exit survey. Prior to 2020 net promoter scores did not include visitors whose country of residence was Alderney, as a high proportion of these passengers were in transit (returning via Guernsey to Alderney). Since Q1 2023 all passengers (regardless of country of residence) that are leaving the Island by aeroplane or ferry after only visiting Guernsey on their way to or from somewhere outside the Bailiwick (and, as such, potentially may not have left the port) are excluded from the net promoter scores analysis on this page. At present, those departing on cruise ships or yachts are not asked to complete the same survey and are not represented within the net promoter scores presented on this page.

The net promoter score is calculated by deducting the percentage of visitors surveyed that gave a score of six or less out of ten from the percentage of visitors surveyed that gave a score of ten or nine out of ten. As shown in **Figure 7.1.1**, when restrictions were put in place to reduce the impact of COVID-19, surveys were suspended and net promoter scores could not be ascertained.

As shown in **Table 7.1.1**, the overall net promoter score for 2023 was 61 percentage points. Net promoter scores show some seasonality, tending to be lower in winter months (Q1 and Q4) and higher in summer months (Q2 and Q3). In 2023, those who gave a score of nine or ten out of ten remarked that it is a beautiful island, a friendly, safe and clean place (with many noting the cleanliness of public amenities), has a good bus service, provides a good airport experience and that the new facilities at La Vallette bathing pools are excellent.

In 2023, themes from those who gave a score of six or less out of ten include they have been working and/or haven't seen the Island, it is expensive, has too much traffic, there is a lack of visitor attractions and they have experienced travel disruption.

Figure 7.1.1 Net promoter score



*Between Q1 2020 and Q4 2022 net promoter scores were not determined. When restrictions were put in place to reduce the impact of COVID-19, exit passenger surveys at the airport and harbour were suspended. In Q1 2023 exit surveys were re-instigated and net promoter scores could again be reported.

Table 7.1.1 Net promoter score

	Q1 2023	Q2 2023	Q3 2023	Q4 2023	2023
Net Promoter Score (percentage points)	55	64	66	52	61

8.1 Methodology

Exit surveys are undertaken daily at the airport and harbour, with a random sample of departing passengers being interviewed. The proportions of resident versus visitor travellers are then applied to the actual numbers of total passengers (provided by the airport and harbour authorities) to determine the passenger composition of Guernsey's main air and sea routes. The survey is conducted using internationally accepted methodology.

In 2023, 25,800 completed interviews were conducted with individuals at the harbour and airport, who responded to the survey on behalf of their immediate travelling party. These interviews represented a total party size of 48,468 passengers, which is 11% of the total number of passengers departing Guernsey during 2023 (excluding those travelling within the Islands of the Bailiwick and those departing by cruise ship or yacht). All sample surveys are subject to a degree of statistical error. In 2023, there were 25,800 exit interviews conducted and it was found that, excluding cruise ship and yacht visitors, 47% of respondents were departing visitors. With a 95% confidence level, the margin of error is plus or minus 0.4%. In other words, there is a 95% probability that the proportion of departing visitors lies within the range of 46.6% to 47.4%. As the sample sizes decrease (for individual routes, purposes of visit and types of accommodation for example), so the margin of error increases.

Upon completion of exit surveys at the harbour and airport visitors were asked: *Would you be willing to give us some more feedback about your visit via an online survey, if I give you a link to follow? If so, you can enter a quarterly prize draw to win £100 in Amazon gift vouchers.* For those respondents who replied yes, a link/QR code was shown to the respondent to follow in order to take part. The Visitor Survey asks some more detailed questions about the activities undertaken and experiences of visitors to Guernsey. A much smaller sample of 792 people completed the Visitor Survey during 2023.

The statistics based upon Visitor Survey data represents 0.4% of all visitors to Guernsey during 2023 and 2% of all those who completed an exit survey at the airport and harbour. At a confidence interval of 95%, data presented from the Visitor Survey is reported with a 4% margin of error, which means the true result may lie within plus or minus 4 percentage points of the percentages published. Where numbers are based upon Visitor Survey data this is noted in the report.

Visitor Survey data which relates to all visitors has been weighted by purpose of visit according to the proportions presented in [Section 4.1](#), in order to be representative of all visitors. Where results are based on only business visitors or only leisure visitors and those seeing friends and family, results have been presented unweighted.

8.2 Contact details

You may also be interested in other States of Guernsey Data and Analysis publications, which are all available online at www.gov.gg/data. Please contact us for further information.

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