

Guernsey Quarterly Travel and Visitor Accommodation Bulletin

Quarter 4 2024

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The Guernsey Quarterly Travel and Visitor Accommodation Bulletin provides information on travellers into and out of the Island of Guernsey and utilisation of visitor accommodation.



States of Guernsey
Data and Analysis

1.1 Introduction

The Guernsey Quarterly Travel and Visitor Accommodation Bulletin provides information on visitors to the Island of Guernsey and the accommodation they stayed in, as well as Guernsey residents travelling to destinations outside the Bailiwick. It uses data gathered via surveys of people leaving Guernsey, alongside data provided by visitor accommodation providers and Guernsey Ports.

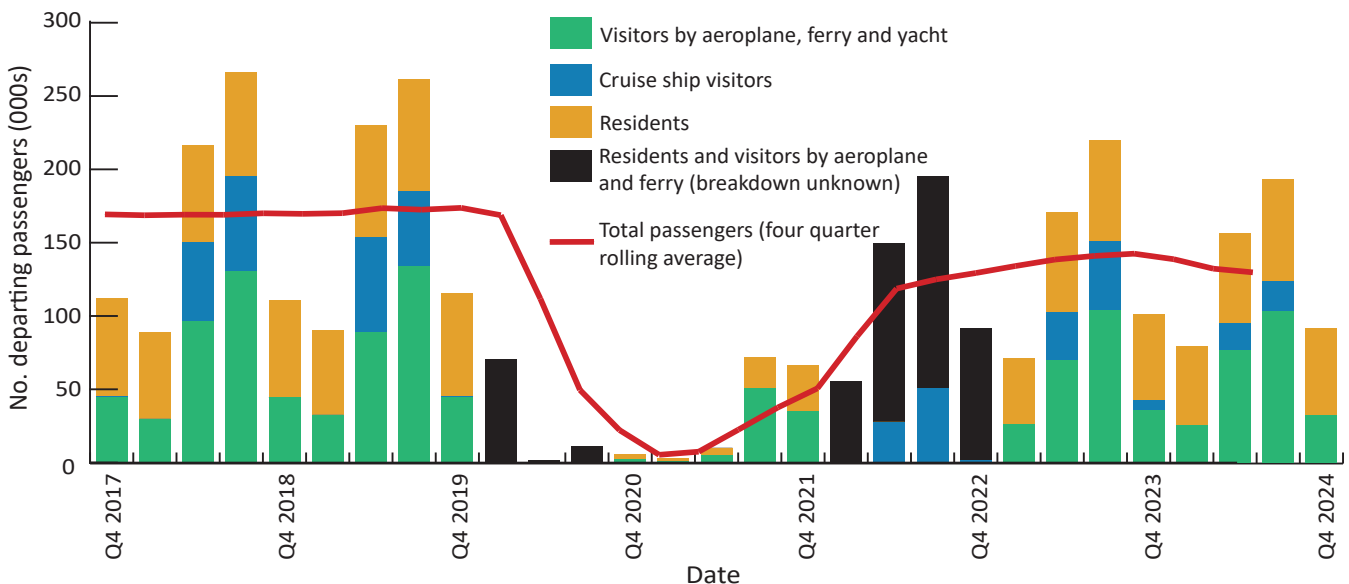
This is the eighth Guernsey Quarterly Travel and Visitor Accommodation Bulletin. Some data was not collected during the COVID-19 pandemic, but is now being collected again (although, in some cases, with a different methodology). Feedback was invited, following publication of the Q1 2023 Bulletin, and as a result, some additional information has been included in subsequent editions. More feedback is always welcome.

Previous Guernsey Travel Survey reports are available via https://www.gov.gg/travel_and_visitor.

Statistics are presented in a comparable manner over time and with other jurisdictions wherever possible. It should be noted that the passenger volume figures throughout this report 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).

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 such, comparisons in this report are mainly drawn between 2019, 2023 and 2024. Travel to and from the Island is highly seasonal, as can be seen in **Figure 1.2.1**, so the same quarter of each year is used for comparison throughout this bulletin.

1.2 Headlines (continued)

All Passengers

- The total number of (resident and visiting) passengers (including cruise and yacht passengers) departing Guernsey was 91,205 during Q4 2024. This compares with 101,248 during quarter four 2023; a decrease of 10%. It is 21% lower than five years earlier, in Q4 2019.
- The number of passengers travelling by aeroplane in Q4 2024 was 6% lower than Q4 2023 and 26% lower than Q4 2019. The number of passengers travelling by ferry was 7% higher than Q4 2023 and 12% higher than Q4 2019. The number of cruise passengers was 97% lower than Q4 2023 but 14% higher than Q4 2019. The number of visitors by yacht was 5% higher than Q4 2023 and 206% higher than Q4 2019. Please note percentage changes for cruise ship and yacht visitors during Quarter 4 can fluctuate significantly as they are based on low numbers.

Visitors

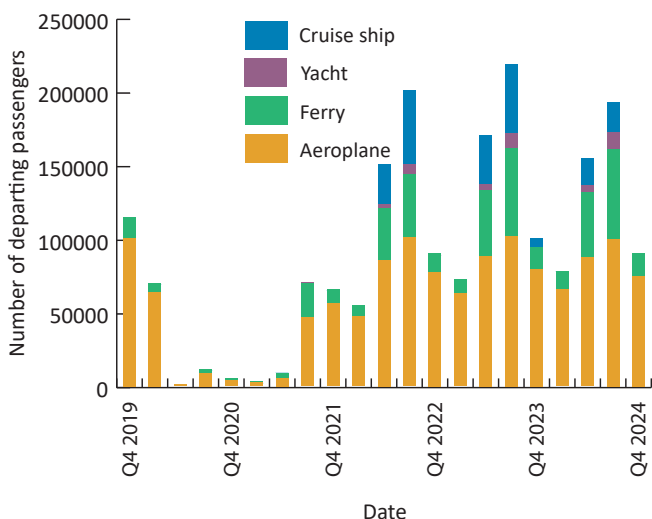
- The number of visitors that stayed in Guernsey for at least one night but no more than 30 nights (having travelled by aeroplane and ferry) was 27,502 people in Q4 2024; 9% lower than Q4 2023 and 26% lower than Q4 2019. Of these, 29% were here for leisure, 47% to see friends/family, 19% for business and 5% for other reasons.
- In Q4 2024, 59% of all visitors staying in Guernsey stayed in hotels, (16,209 people), 36% stayed with friends/family (9,781 people) and 5% stayed in other accommodation (1,511 people).
- The average length of stay for staying visitors in Q4 2024, was 4.1 nights compared with 4.3 nights in Q4 2023 and 4.2 nights in Q4 2019.
- Day trip visitors (who travelled by aeroplane and ferry) totalled 3,357 people in Q4 2024; 31% lower than Q4 2023 and 48% lower than Q4 2019.
- Of these day trip visitors, 23% were here for leisure, 5% to see friends/family, 54% for business and 18% for other purposes.
- 588 visitors travelled to Guernsey on a yacht in Q4 2024.
- 180 visitors travelled to Guernsey on a cruise ship in Q4 2024.
- In Q4 2024, the number of visitors (excluding cruise ship visitors) totalled 31,871 people, 28% fewer than Q4 2019 and 11% fewer than Q4 2023. By country of residence, when compared with Q4 2023, there were 13% fewer visitors from the UK, 18% fewer visitors from Jersey, 10% fewer visitors from the Rest of the World, but 150% more visitors from France during Q4 2024.
- The net promoter score given by visitors (by aeroplane or ferry) was 53 percentage points in Q4 2024 and compares with 52 percentage points in Q4 2023 and 53 percentage points in Q4 2019.
- There were 1,893, 1,835 and 1,725 units of visitor accommodation available for booking in October, November and December 2024 respectively. The occupancy of available units was 53% in October, 39% in November and 32% in December 2024. Long-stay guests represented 11 percentage points of the occupancy of open units in December 2024.

Residents

- The total number of departing residents in Q4 2024 was 58,976; 1% higher than Q4 2023 and 15% lower than Q4 2019.
- Of the residents, 50,453 residents travelled by aeroplane; 1% lower than Q4 2023 and 22% lower than Q4 2019. 8,523 residents travelled by ferry; 17% higher than Q4 2023 and 66% higher than Q4 2019. 50% of residents travelled during Q4 2024 for leisure purposes and 82% travelled to the UK.

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**, with the exception of 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), the quarterly number of passengers is highly seasonal. Total departing passengers in Q4 2024, as shown in **Table 2.1.1**, was 91,205, 10% lower than Q4 2023 and 21% lower than pre COVID-19 passenger volumes in Q4 2019.

82% of all departing passengers travelled by aeroplane in Q4 2024, 74,698 people, 6% lower than Q4 2023 and 26% lower than Q4 2019. 17% of all passengers travelled by ferry in Q4 2024, 15,739 people, 7% higher than Q4 2023 and 12% higher than Q4 2019.

Table 2.1.1 Passenger volumes

	Q4 2019	Q4 2023	Q4 2024	Annual % change	5 yr % change
Passengers departing Guernsey by aeroplane	100,597	79,447	74,698	-6%	-26%
Passengers departing Guernsey by ferry	14,010	14,765	15,739	7%	12%
Passengers departing Guernsey by yacht	192	562	588	5%	206%
Passengers departing Guernsey by cruise ship	158	6,474	180	-97%	14%
Total departing passengers	114,957	101,248	91,205	-10%	-21%

2.2 Passenger volumes by 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.

As shown in **Figure 2.2.1**, with the exception of 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), the quarterly number of passengers is highly seasonal. Higher numbers of departing passengers are typically recorded during Quarter 2 and Quarter 3 each year, whilst lower numbers of passengers are recorded during Quarter 1 and Quarter 4. For this reason comparisons of passenger volumes are made with equivalent periods in previous years.

82% of all passengers departed Guernsey for the UK, totalling 74,670 people in Q4 2024, 3% lower than Q4 2023 and 20% lower than Q4 2019. 12% of all passengers departing Guernsey were travelling to Jersey and totalled 11,257 people in Q4 2024, 11% lower than Q4 2023, and 36% lower than Q4 2019. 5% of passengers departed Guernsey for the rest of the world and totalled 4,510 people in Q4 2024, 1% lower than Q4 2023 but 40% higher than Q4 2019. 1% of passengers departed Guernsey on a cruise or yacht trip in Q4 2024, 768 people.

Figure 2.2.1 Passenger volumes by destination

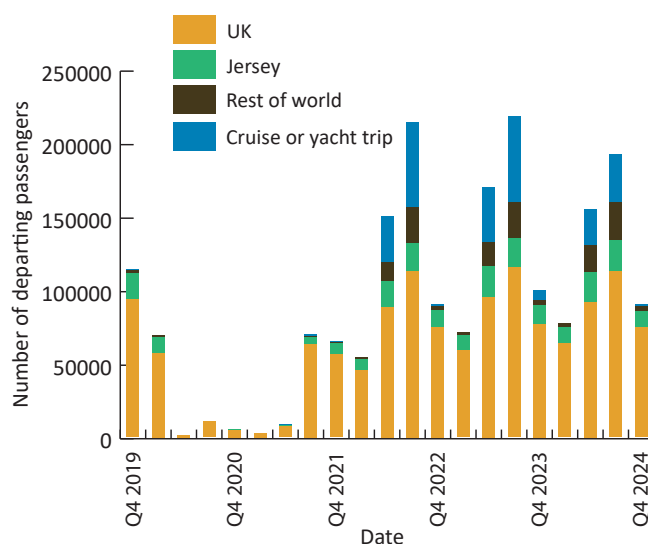
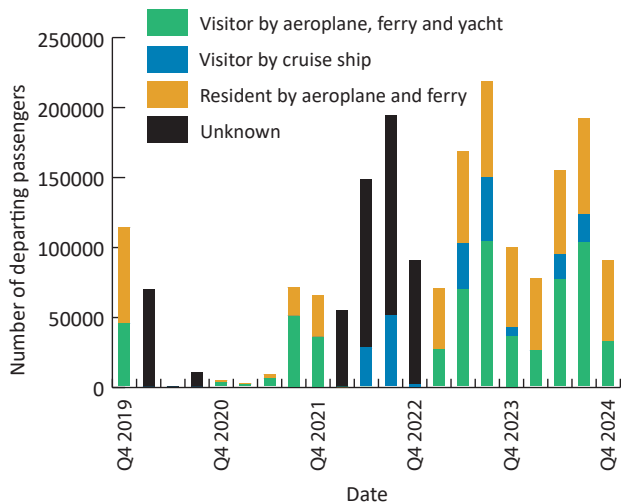


Table 2.2.1 Passenger volumes by destination

	Q4 2019	Q4 2023	Q4 2024	Annual % change	5 yr % change
Passengers departing Guernsey for United Kingdom	93,797	77,032	74,670	-3%	-20%
Passengers departing Guernsey for Jersey	17,579	12,640	11,257	-11%	-36%
Passengers departing Guernsey for rest of world	3,231	4,540	4,510	-1%	40%
Passengers departing Guernsey on cruise or yacht trip	350	7,036	768	-89%	119%
Total departing passengers	114,957	101,248	91,205	-10%	-21%

2.3 Passenger volumes - visitors and residents

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 Q4 2024 (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 quarter.

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

	Q4 2019	Q4 2023	Q4 2024	Annual % change	5 yr % change
Residents departing Guernsey by aeroplane	64,648	51,060	50,453	-1%	-22%
Residents departing Guernsey by ferry	5,122	7,294	8,523	17%	66%
Visitors by aeroplane	35,448	27,877	24,098	-14%	-32%
Visitors by ferry	8,888	7,357	7,184	-2%	-19%
Visitors by yacht	192	562	588	5%	206%
Visitors by cruise ship	158	6,474	180	-97%	14%
Total departing residents	69,770	58,354	58,976	1%	-15%
Total visitors (excluding cruise ship visitors)	44,528	35,796	31,871	-11%	-28%
Total visitors (including cruise ship visitors)	44,686	42,270	32,051	-24%	-28%
Total visitors returning to Guernsey later	501	625	178	-71%	-64%

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

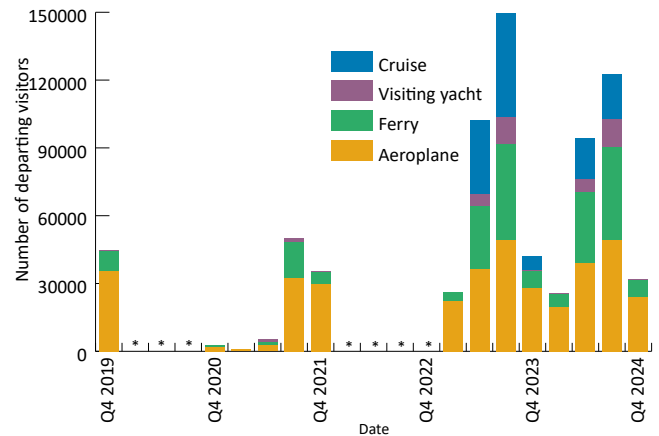
2.3 Passenger volumes - visitors and residents

As shown in **Table 2.3.1** and **Figure 2.3.1**, of the 58,976 passengers, 65% of those departing Guernsey in Q4 2024, were residents, whilst 35% of those departing Guernsey were visitors (32,051 passengers). A small proportion, less than 1%, 178 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 visitors travelling by ferry, aeroplane, cruise ship/visiting yacht each quarter. In Q4 2024, excluding those who visited by cruise ship, there were 31,871 visitors, 28% lower than Q4 2019 and 11% lower than Q4 2023. 180 people travelled by cruise ship during Q4 2024. The number of visitors travelling by aeroplane, 24,098 people in Q4 2024, was 32% lower than the number travelling by aeroplane in Q4 2019, and 14% lower than Q4 2023. The number of visitors travelling by ferry in Q4 2024, 7,184 people, was 19% lower than the number travelling by ferry in Q4 2019, and 2% lower than Q4 2023. 588 people visited by yacht in Q4 2024.

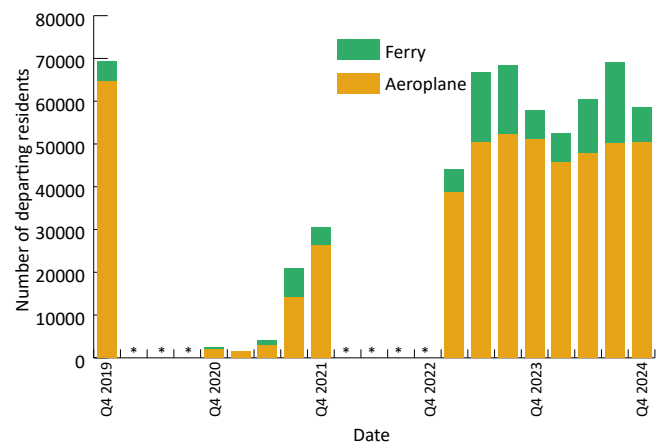
Figure 2.3.3 shows the volume of residents travelling by ferry and aeroplane each quarter. The total number of departing residents in Q4 2024 was 58,976; 1% higher than Q4 2023, but 15% lower than Q4 2019. In Q4 2024, 86%, 50,453 residents travelled by aeroplane, the remainder, 14%, 8,523 residents travelled by ferry. The number of residents travelling by aeroplane in Q4 2024 was 22% lower than the number travelling by aeroplane in Q4 2019 and 1% lower than the number travelling by aeroplane in Q4 2023. The number of residents travelling by ferry in Q4 2024 was 66% higher than the number travelling by ferry in Q4 2019 and 17% higher than the number travelling by ferry in Q4 2023.

Figure 2.3.2 Passenger volumes - visitors by mode of transport



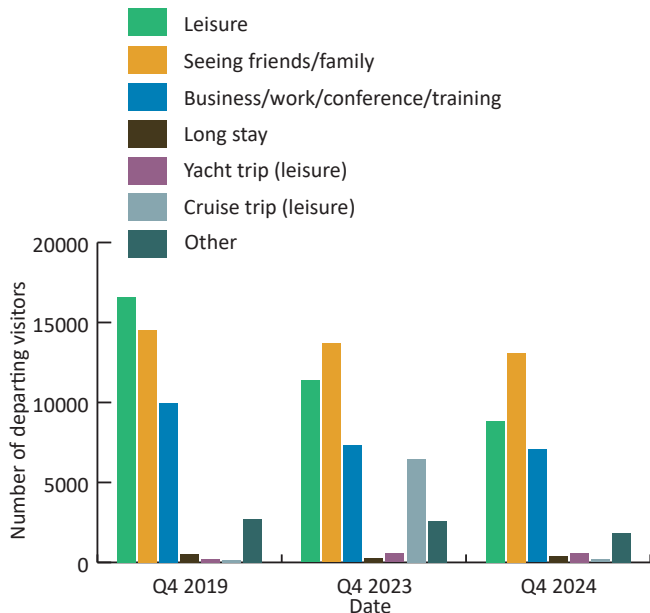
*When restrictions were put in place to reduce the impact of COVID-19, surveys of exiting passengers at the airport and harbour were suspended between Q1 2020 and Q1 2023. A limited amount of passenger information was collected from the travel tracker system which was in place between Q4 2020 and Q4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

Figure 2.3.3 Passenger volumes - residents by mode of transport



3.1 Visitors - main purpose of trip to Guernsey

Figure 3.1.1 Visitors - main purpose of trip to Guernsey



Visitors are asked during passenger exit surveys what the main purpose of their trip to Guernsey is. Survey results are applied to overall passenger volumes to give figures for the whole quarter. 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 Q4 2024, 8,840 visitors reported the main purpose of their trip to Guernsey was for leisure (16,592 in Q4 2019 and 11,376 in Q4 2023). Additionally, 588 people visited by yacht and 180 by cruise ship (most likely for leisure purposes). 13,109 visitors cited they were seeing friends/family (14,518 in Q4 2019 and 13,682 in Q4 2023). 7,060 visitors were here for business, which compares with 9,950 in Q4 2019, 29% lower, and 7,313 business visitors in Q4 2023, 3% lower. 1,850 visitors were here for other reasons during Q4 2024. 559 or 30% of those visitors who cited other reasons mentioned sport, be it as a participant or spectator (representing just under 2% of all visitors in Q4 2024). The other category also includes visitors to Guernsey in transit, visitors on a school trip/visit and visitors in Guernsey for medical/hospital purposes.

424 visitors during Q4 2024 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.

Table 3.1.1 Visitors - main purpose of trip to Guernsey

	Q4 2019	Q4 2023	Q4 2024	Annual % change	5 yr % change
Leisure (e.g. holiday/vacation/break)	16,592	11,376	8,840	-22%	-47%
Seeing friends/family (including weddings, funerals etc)	14,518	13,682	13,109	-4%	-10%
Business/work/conference/training	9,950	7,313	7,060	-3%	-29%
Long stay (more than 30 nights but less than 1 year for work/other purpose)	539	270	424	57%	-21%
Yacht trip (leisure)	192	562	588	5%	206%
Cruise trip (leisure)	158	6,474	180	-97%	14%
Other	2,737	2,594	1,850	-29%	-32%
Total	44,686	42,270	32,051	-24%	-28%

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

3.2 Visitors - country of residence

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 quarter. 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 Q4 2024, 74% of all visitors, 23,782 people reported their country of residence was the UK (65%, 27,277 in Q4 2023). 10%, 3,154 visitors were from Jersey (9%, 3,830 in Q4 2023). 3%, 1,006 visitors were from France (1%, 402 in Q4 2023), 10%, 3,341 visitors were from the Rest of the world (9%, 3,724 in Q4 2023), and 2%, 768 visitors' country of residence was unknown, as they were visiting by cruise ship or yacht (17%, 7,036 in Q4 2023).

As shown in **Table 3.2.1**, in Q4 2024 the number of visitors whose country of residence was the UK was 13% lower when compared to Q4 2023, and 29% fewer than Q4 2019. In Q4 2024 there were 18% fewer visitors whose country of residence was Jersey compared with Q4 2023 and 30% fewer than Q4 2019. In Q4 2024 there were 150% more visitors whose country of residence was France compared with Q4 2023, but 43% fewer than Q4 2019. There were 10% fewer visitors whose country of residence was Rest of the world compared with Q4 2023 and 25% fewer than Q4 2019.

Table 3.2.1 Visitors - country of residence

	Q4 2019	Q4 2023	Q4 2024	Annual % change	5 yr % change
United Kingdom	33,663	27,277	23,782	-13%	-29%
Jersey	4,477	3,830	3,154	-18%	-30%
France	1,753	402	1,006	150%	-43%
Rest of world	4,443	3,724	3,341	-10%	-25%
Unknown (cruise ship and yacht passengers)	350	7,036	768	-89%	119%
Total	44,686	42,270	32,051	-24%	-28%

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

Figure 3.2.1 Visitors - country of residence Q4 2023

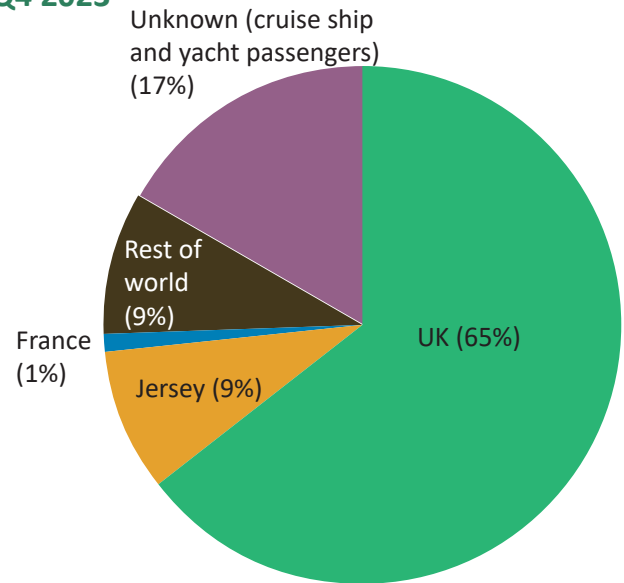
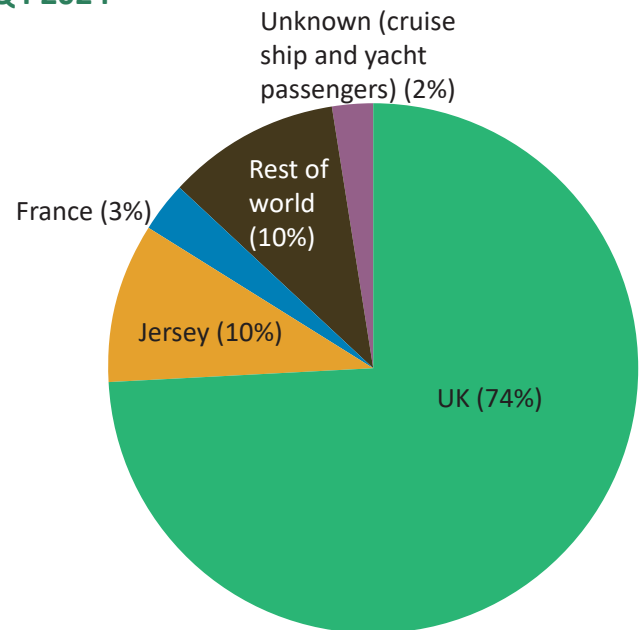


Figure 3.2.2 Visitors - country of residence Q4 2024



3.3 Visitors - net promoter score

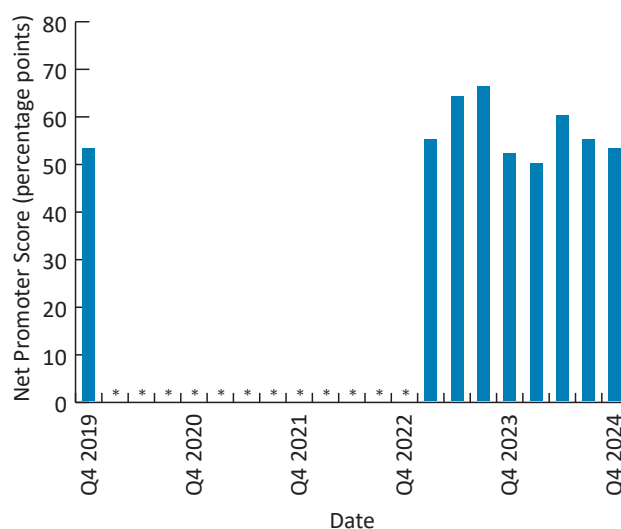
Visitors leaving the Island by aeroplane or ferry are asked how likely they would be to recommend Guernsey to a friend or relative (as a score out of 10, with 10 meaning very likely) as part of the exit survey. Prior to 2020 net promoter scores did not include visitors whose country of residence was 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 survey and are not represented within net promoter scores. As shown in **Figure 3.3.1** 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 surveys were suspended and the passenger breakdown could not be determined or net promoter scores ascertained.

The net promoter score (NPS) 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 **Table 3.3.1** and **Figure 3.3.1** the net promoter score for Q4 2024 was 53 percentage points compared with 52 percentage points in Q4 2023 and 53 percentage points in Q4 2019. The NPS is largely unchanged between Q4 2019, Q4 2023 and Q4 2024. 77% of all visitors to Guernsey during Q4 2024 said they had visited before, less than 1% of whom had visited Guernsey on a cruise.

Respondents may choose to provide comments or feedback after providing their net promoter score. Analysis of these comments reveals that during Q4 2024 the highest number of comments received were from respondents who reported they had not seen much during their visit (14%), the majority of these were from people visiting for business purposes. 11% of all comments related to travel delays. 9% of all comments suggested there was a lack of things to do and noting that a number of attractions were closed during winter months. 8% commented on the roads noting that there was too much traffic, a lack of road signs, and roadworks. 7% commented that Guernsey was beautiful and a further 7% commented on the great attractions in Guernsey, notably the German Occupation Museum and The Bathing Pools.

By main purpose of visit, leisure visitors had the highest net promoter score (64 percentage points) in Q4 2024, followed by those seeing friends/family, 60 percentage points. Those visiting on business had the lowest net promoter score, 38 percentage points, with, as seen above, many business travellers commenting that they haven't seen much during their visit.

Figure 3.3.1 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-instated and net promoter scores could again be reported.

Table 3.3.1 Net promoter score

	Q4 2019	Q4 2023	Q4 2024
Net Promoter Score (percentage points)	53	52	53

3.4 Visitors - length of stay in Guernsey

Figure 3.4.1 Visitors - length of stay in Guernsey Q4 2023

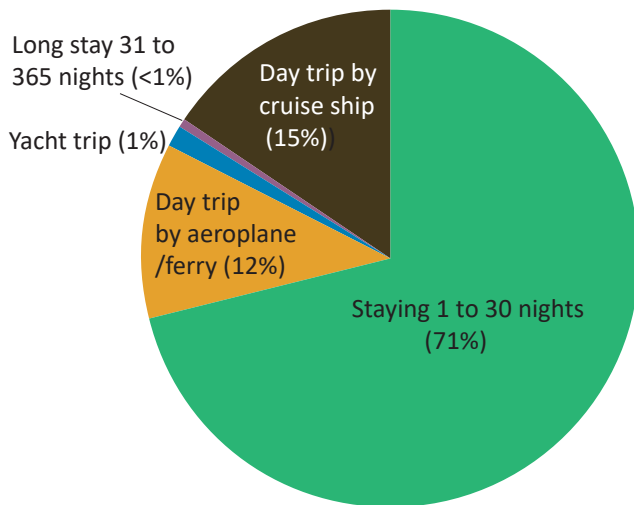


Figure 3.4.2 Visitors - length of stay in Guernsey Q4 2024

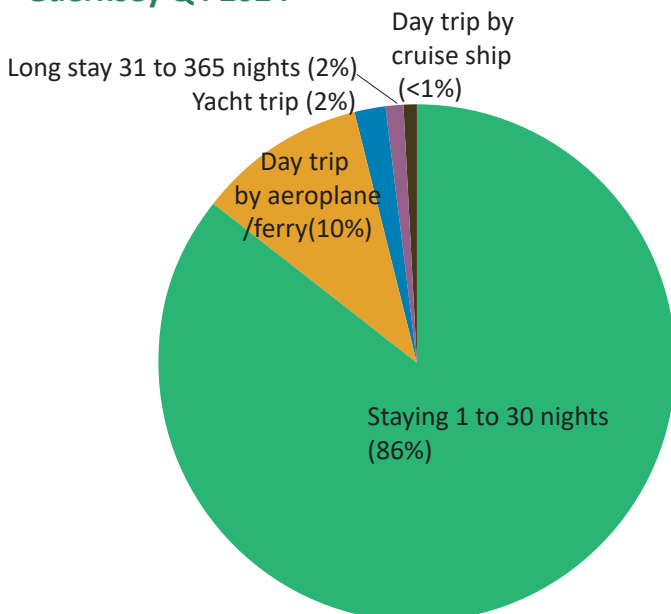


Table 3.4.1 Visitors - length of stay in Guernsey

	Q4 2019	Q4 2023	Q4 2024	Annual % change	5 yr % change
Staying 1 to 30 nights by aeroplane or ferry	37,327	30,075	27,502	-9%	-26%
Day trip by aeroplane or ferry	6,470	4,889	3,357	-31%	-48%
Yacht trip	192	562	588	5%	206%
Long stay (more than 30 nights but less than 1 year) by aeroplane or ferry	539	270	424	57%	-21%
Day trip by cruise ship	158	6,474	180	-97%	14%
Total	44,686	42,270	32,051	-24%	-28%

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

Visitors are also asked how many nights they spent in Guernsey within passenger exit surveys. Survey results are applied to overall passenger volumes to give figures for the whole quarter.

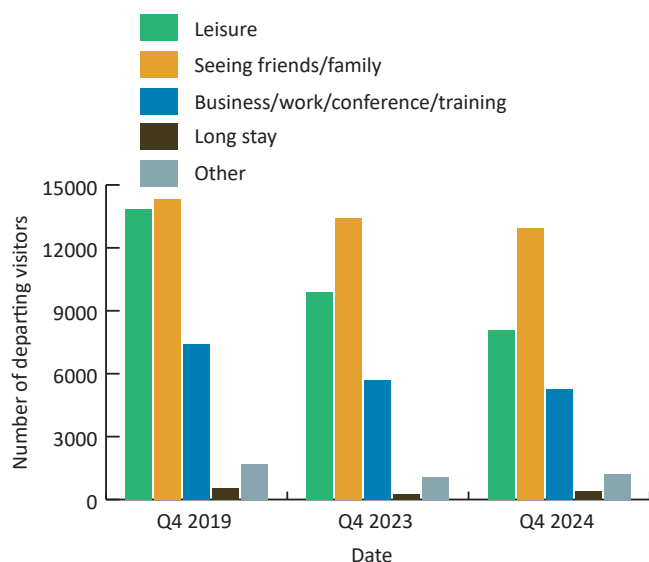
At present, those departing on cruise ships or yachts are not asked to complete the same survey. The overall number of these visitors (who, for the most part, likely stay overnight on their boat and visit Guernsey for day trips) is included in this section for completeness.

In Q4 2024, 3,357 people visited Guernsey on a day trip, representing 10% of all visitors (4,889 people, 12% in Q4 2023). The majority, 86% of visitors, 27,502 people, stayed at least one night but less than 31 nights (30,075 people, 71% in Q4 2023). During Q4 2024, 2% of visitors were long stay visitors (424 people).

Comparison between Q4 2024, Q4 2023 and Q4 2019 reveals that in Q4 2024 there were 48% fewer visitors on a day trip compared with Q4 2019 and 31% fewer visitors on a day trip compared with Q4 2023. 26% fewer visitors stayed at least one night (but less than 31 nights) compared with Q4 2019, and 9% fewer than Q4 2023.

4.1 Visitors - main purpose of visit of staying visitors

Figure 4.1.1 Main purpose of trip of staying visitors



Visitors by aeroplane and ferry and staying in Guernsey are asked what the main purpose of their trip to Guernsey is. Survey results are applied to overall passenger volumes to give figures for the whole quarter.

In Q4 2024, 29% or 8,069 of all staying visitors reported the main purpose of their trip to Guernsey was for leisure (13,869 in Q4 2019 and 9,875 in Q4 2023). 46% or 12,932 of staying visitors cited they were seeing friends/family (compared with 14,350 in Q4 2019 and 13,433 in Q4 2023). 19%, 5,262 were here for business or work reasons (7,406 in Q4 2019 and 5,693 in Q4 2023) and 4%, 1,239 were here for other reasons (1,702 in Q4 2019 and 1,074 in Q4 2023). 2% or 424 visitors were long stay visitors, having stayed more than 30 nights but less than 1 year, in Q4 2024 (539 visitors in Q4 2019 and 270 in Q4 2023).

Comparison between Q4 2024, Q4 2023 and Q4 2019 reveals that in Q4 2024 there were 42% fewer staying visitors visiting for leisure purposes compared to Q4 2019 and 18% fewer than Q4 2023. The number of visitors seeing friends/family in Q4 2024 was 10% lower than Q4 2019 and 4% lower than Q4 2023. In Q4 2024 29% fewer staying visitors travelled for business/work compared with Q4 2019, and 8% fewer people travelled for business/work compared with Q4 2023.

Table 4.1.1 Main purpose of trip of staying visitors

	Q4 2019	Q4 2023	Q4 2024	Annual % change	5 yr % change
Leisure (e.g. holiday/vacation/break)	13,869	9,875	8,069	-18%	-42%
Seeing friends/family (including weddings, funerals etc)	14,350	13,433	12,932	-4%	-10%
Business/work/conference/training	7,406	5,693	5,262	-8%	-29%
Long stay (more than 30 nights but less than 1 year)	539	270	424	57%	-21%
Other	1,702	1,074	1,239	15%	-27%
Total	37,866	30,344	27,925	-8%	-26%

NB: Main purpose of visitor breakdown may not add to totals due to rounding. Sample proportions are applied to actual passenger numbers to determine purpose of trip for staying visitors.

4.2 Visitors - country of residence by main purpose of trip of staying visitors

Figure 4.2.1 Staying visitors - country of residence by main purpose of visit

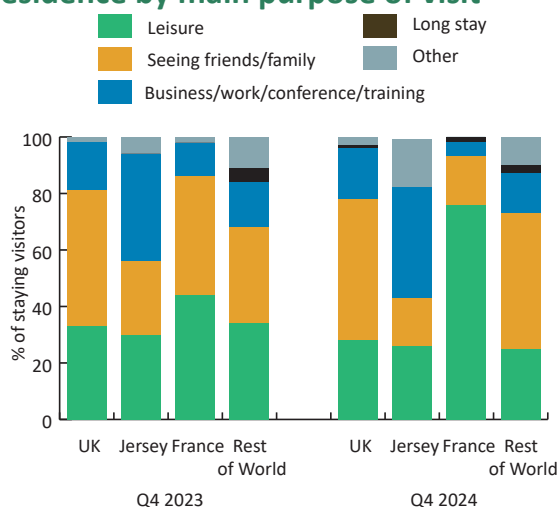


Table 4.2.1 Q4 2023 Staying visitors - country of residence by main purpose of visit

	UK (%)	Jersey (%)	France (%)	Rest of World (%)
Leisure (e.g. holiday/vacation/break)	33	30	44	34
Seeing friends/family (including weddings, funerals etc)	48	26	42	34
Business/work/conference/training	17	38	12	16
Long stay (more than 30 nights but less than 1 year)	<1	0	1	5
Other	2	6	2	11
Total	100	100	100	100

Table 4.2.2 Q4 2024 Staying visitors - country of residence by main purpose of visit

	UK (%)	Jersey (%)	France (%)	Rest of World (%)
Leisure (e.g. holiday/vacation/break)	28	26	76	25
Seeing friends/family (including weddings, funerals etc)	50	17	17	48
Business/work/conference/training	18	39	5	14
Long stay	1	0	2	3
Other	3	17	0	10
Total	100	100	100	100

A further breakdown for staying visitors, by country of residence and main purpose of visit, is provided in **Figure 4.2.1** and **Tables 4.2.1** and **4.2.2**. The analysis presented on this page is based on visitors travelling to Guernsey by aeroplane and ferry only and does not include those visiting by yacht.

In Q4 2024, 28% of staying visitors from the UK reported the main purpose of their trip to Guernsey was for leisure, compared with 33% in Q4 2023. 50% of staying visitors from the UK were seeing friends/family, compared to 48% in Q4 2023, and 18% of staying visitors from the UK were in Guernsey for business/work reasons.

The principal reasons for staying visits in Q4 2024 from those with country of residence of Jersey were business and leisure; 39% and 26% respectively. This compares with 38% and 30% in Q4 2023. 17% of staying visitors from Jersey were in Guernsey to see friends/family or for other reasons. The other category includes visitors to Guernsey in transit, visitors on a school trip/visit, sports participants, sports spectators and visitors in Guernsey for medical/hospital purposes.

Visitors from France were most likely to report in Q4 2024 that their main purpose of visit was for leisure, 76%. This compares with 44% of staying visitors from France in Q4 2023. 17% whose country of residence was France reported they were visiting to see friends/family in Q4 2024. 5% cited they were in Guernsey for business purposes.

In Q4 2024, 48% of staying visitors whose country of residence was the Rest of the world reported they were in Guernsey to see friends/family and a further 25% were visiting Guernsey for leisure purposes. 14% of staying visitors whose country of residence was the Rest of the world reported they were staying in Guernsey for business reasons and 3% were long stay visitors (having stayed more than 30 nights but less than 1 year).

NB: Figures may not sum exactly to 100 due to rounding.

4.3 Visitors - staying visitors length of stay in Guernsey

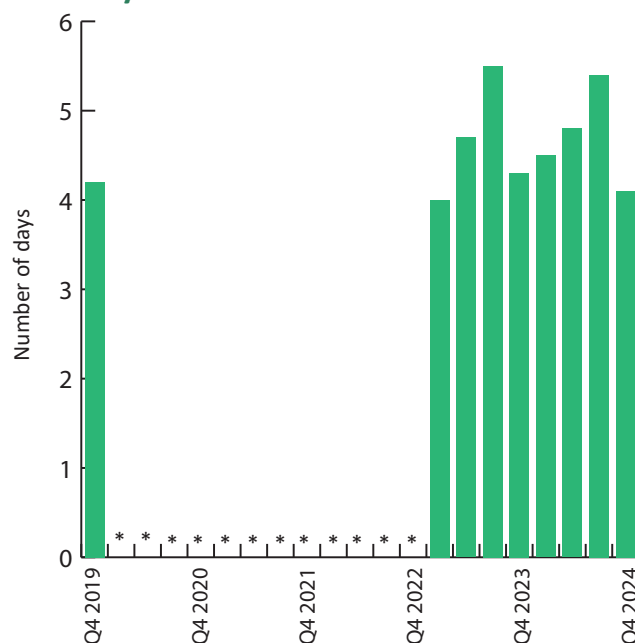
As shown in **Figure 4.3.1** visitor length of stay varies by quarter and displays some seasonality. There is a tendency for visitors to stay longer during Quarter 2 and Quarter 3 each year (in Q3 2019 the average length of stay for visitors was 5.2 nights) whilst visitors during Quarter 1 and Quarter 4 tend to stay in Guernsey for shorter durations (in Q1 2019 the average length of stay was 4.3 nights). For this reason, comparisons of length of stay are made with equivalent periods in previous years. Those departing on yachts are not asked to complete the same survey and therefore the figures presented on this page represent only those travelling by aeroplane or ferry. Trends in length of stay will continue to be monitored and reported in future editions of this bulletin.

The average length of stay for visitors staying at least one night but less than 31 nights was 4.1 nights in Q4 2024 and compares with 4.3 nights in Q4 2023, and 4.2 nights in Q4 2019. The slight decrease in average length of stay between Q4 2023 and Q4 2024 is due to a decrease in the length of stay for those visitors who travelled by ferry (5.1 nights in Q4 2023, compared with 4.7 nights in Q4 2024). That said, this decrease in length of stay was partially offset by an increase in the length of stay by visitors who travelled by aeroplane (3.9 nights in Q4 2023 compared with 4.0 nights in Q4 2024).

The average length of stay multiplied by the number of staying visitors equates to the number of bed nights spent in Guernsey each quarter, as shown in **Figure 4.3.2**. As with the length of stay data there is seasonality in the figures and comparisons are made with equivalent periods in previous years.

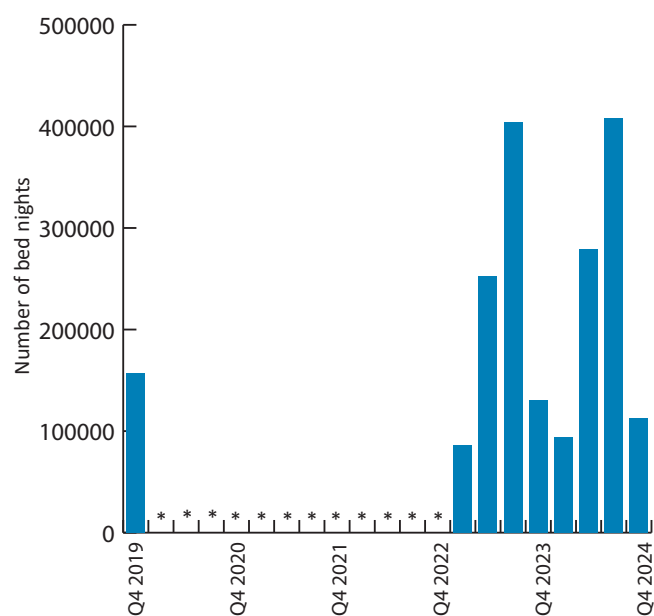
During Q4 2024, visitors spent the equivalent of 112,291 bed nights in Guernsey which compares with 130,040 bed nights in Q4 2023 (a 14% decrease) and 157,209 bed nights in Q4 2019 (a 29% decrease).

Figure 4.3.1 Visitors - length of stay in Guernsey



*Between Q1 2020 and Q4 2022 length of stay by visitors was 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-instated and length of stay could again be reported.

Figure 4.3.2 Visitors - bed nights in Guernsey



*Between Q1 2020 and Q4 2022 length of stay by visitors was 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 bed nights could again be reported.

4.4 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 quarter. Those visitors staying in Guernsey more than 30 nights (long stay) are excluded from this analysis. Those departing on yachts are not asked to complete the same survey and therefore the figures presented on this page represent only those travelling by aeroplane or ferry.

As shown in **Figure 4.4.1**, **Figure 4.4.2** and **Table 4.4.1**, in Q4 2024, 59% of all visitors staying in Guernsey stayed in hotels, (16,209 people), 5% stayed in other accommodation (1,511 people) and 36% stayed with friends/family (9,781 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 Q4 2024, Q4 2023 and Q4 2019 reveals that in Q4 2024 there were 26% fewer visitors staying in hotels than Q4 2019 and 10% fewer visitors staying in hotels than Q4 2023. 54% fewer visitors stayed in Other accommodation in Q4 2024 compared with Q4 2019, and 11% fewer than Q4 2023. In Q4 2024 there were 20% fewer visitors staying in friend/family's homes than Q4 2019 and 5% less than Q4 2023.

Figure 4.4.1 Accommodation for staying visitors Q4 2023

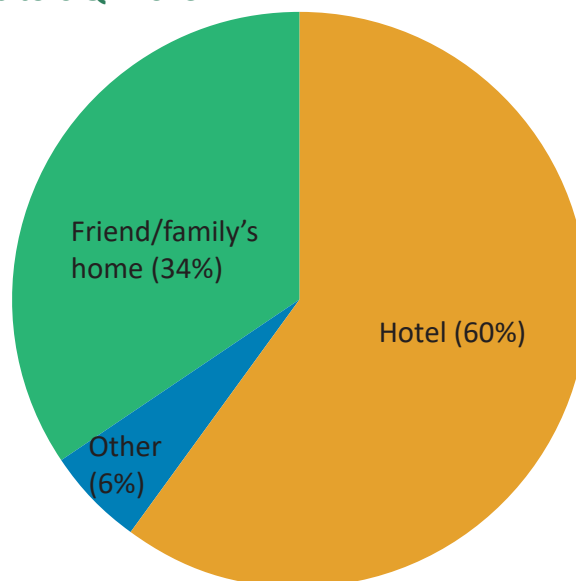


Figure 4.4.2 Accommodation for staying visitors Q4 2024

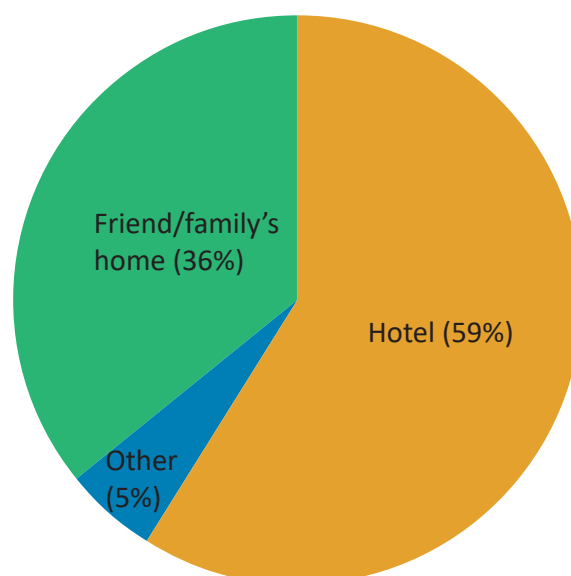


Table 4.4.1 Accommodation for staying visitors

	Q4 2019	Q4 2023	Q4 2024	Annual % change	5 yr % change
Hotel	21,840	18,107	16,209	-10%	-26%
Other (including guest houses, accommodation listed on Airbnb or other online booking portals, self-catering units and campsites etc)	3,272	1,690	1,511	-11%	-54%
Commercial accommodation (includes hotel, guest houses, self-catering, Airbnb or other online booking portals and campsites etc)	25,112	19,797	17,721	-10%	-29%
Friend/family's home	12,214	10,278	9,781	-5%	-20%
Total staying visitors	37,327	30,075	27,502	-9%	-26%

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

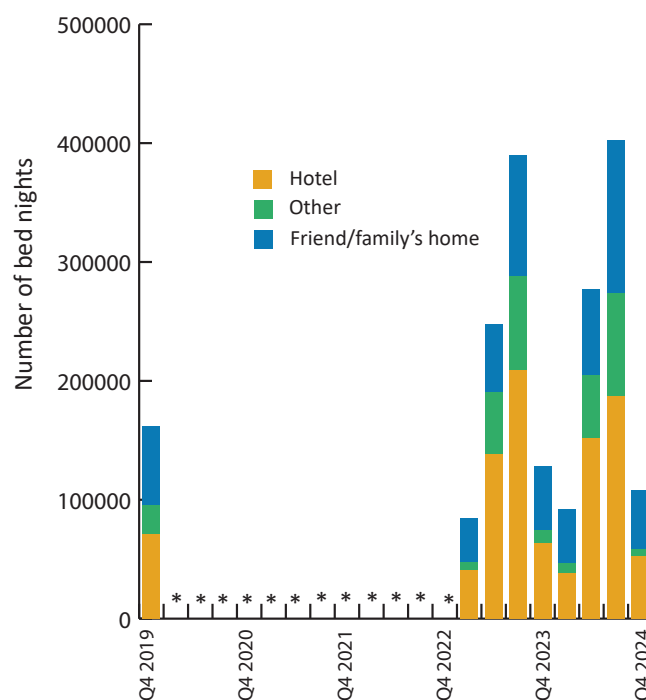
4.4 Visitors - accommodation of staying visitors cont/d

Figure 4.4.3 shows the number of bed nights each quarter for staying visitors in Guernsey by accommodation type. Table 4.4.2 shows length of stay by accommodation type. The number of bed nights varies by quarter and displays seasonality. This is due to a higher number of visitors during Quarters 2 and 3 each year when compared with Quarters 1 and 4 and a tendency for visitors to stay longer during Quarter 2 and Quarter 3, when compared to Quarter 1 and Quarter 4. For this reason comparisons of number of bed nights and length of stay are made with equivalent periods in previous years.

On average visitors in hotels stayed 3.2 nights in Q4 2024, which equates to 52,242 bed nights (3.3 nights in Q4 2019 and 3.5 nights in Q4 2023). The average length of stay in other accommodation (which includes guest houses, any accommodation listed on Airbnb or other online booking portals, self-catering units and campsites etc) was 4.1 nights (equating to 6,237 bed nights). The average stay in commercial accommodation in Q4 2024 which includes both hotels and other accommodation was 3.3 nights, equating to 58,479 bed nights, which is a shorter duration and 22% fewer bed nights than reported in Q4 2023.

During Q4 2024 the average length of stay with friends/family was 5.1 nights, equating to 49,653 bed nights (5.5 nights in Q4 2019 and 5.2 nights in Q4 2023).

Figure 4.4.3 Number of bed nights by accommodation for staying visitors



*Between Q1 2020 and Q4 2022 length of stay by visitors was 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-instated and length of stay and number of bed nights could again be reported.

Table 4.4.2 Average length of stay by accommodation

	Q4 2019 (nights)	Q4 2023 (nights)	Q4 2024 (nights)	Annual % change	5 yr % change
Hotel	3.3	3.5	3.2	-8%	-1%
Other	5.6	6.5	4.1	-36%	-27%
Average stay in commercial accommodation	3.6	3.8	3.3	-12%	-7%
Friend/family's home	5.5	5.2	5.1	-2%	-8%

5.1 Visitor accommodation - capacity

Figure 5.1.1 Visitor accommodation capacity

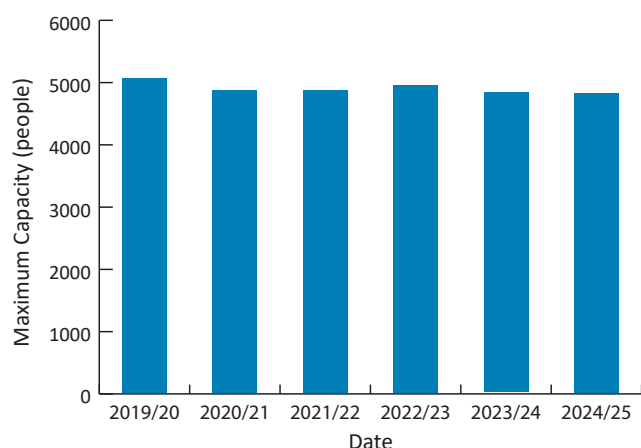


Table 5.1.1 Visitor accommodation capacity

	2019 /20	2020 /21	2021 /22	2022 /23	2023 /24	2024 /25*
Maximum capacity (people)	5,055	4,854	4,863	4,938	4,818	4,810
Temporarily unavailable capacity e.g. closed for refurbishment	0	0	0	120	201	201
Total (including temporarily unavailable)	5,055	4,854	4,863	5,058	5,019	5,011

* Visitor accommodation capacity figures for 2024/25 differ from those presented in the Q1 2024 bulletin, which were provisional since the renewal process for 2024/25 had not been completed at time of publication of the Q1 2024 Bulletin.

Table 5.1.2 Additional summer capacity

	2023	2024
Maximum additional capacity (people)	320	349
Additional number of units (equipped tents, log cabins, yurts, shepherd's huts etc)	60	66

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 capacity of accommodation providers with an active boarding permit for the 2024 summer season and winter 2024/25 was 4,810, as shown in **Table 5.1.1**. Please note figures for 2024/25 differ from those provisional figures presented in the Q1 2024 bulletin, as the renewal process for 2024/25 was not complete when Q1 figures were published. 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 2024, an additional 349 people could be accommodated in 66 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 in October, November and December 2024 include different accommodation types and sizes and statistics for these months are accurate to at least plus or minus 2% (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. 2023/24 boarding permit information was used to scale up the figures for the second, third and fourth quarters of 2023 and first quarter of 2024. 2024/25 boarding permit information was used to scale up the figures for the second and third quarters of 2024.

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 2022 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 1,917 visitor accommodation units in Q4 2024. During Q4 2024 there were an increasing number of seasonal visitor accommodation closures. The proportion of visitor accommodation units available to be booked was 98.8%, 95.7% and 90.0% in October, November and December 2024 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
Dec 2023	1,744	158	1,902
Jan 2024	1,556	346	1,902
Feb 2024	1,601	301	1,902
Mar 2024	1,900	2	1,902
Apr 2024	1,917	0	1,917
May 2024	1,917	0	1,917
Jun 2024	1,914	3	1,917
Jul 2024	1,916	1	1,917
Aug 2024	1,912	5	1,917
Sep 2024	1,911	6	1,917
Oct 2024	1,893	24	1,917
Nov 2024	1,835	82	1,917
Dec 2024	1,725	192	1,917

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

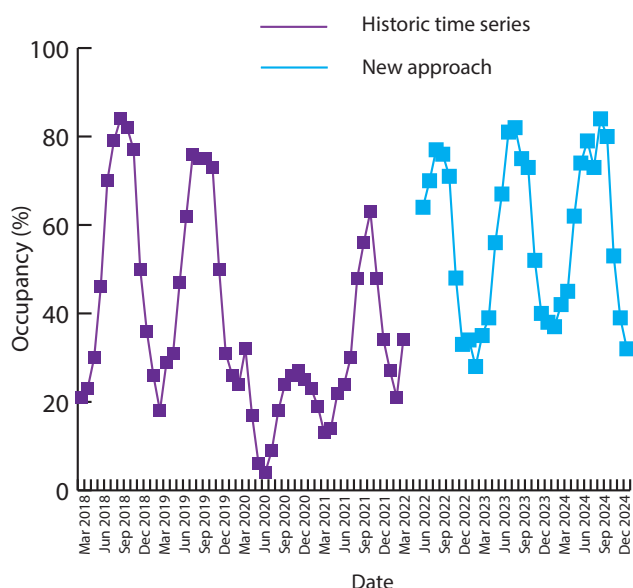


Table 5.3.1 Occupancy of open/available accommodation units

	2019	2020	2021	2022	2023	2024
January	18%	24%	19%	21%	28%	37%
February	29%	32%	13%	34%	35%	42%
March	31%	17%	14%	*	42%	45%
April	47%	6%	22%	*	56%	62%
May	62%	4%	24%	64%	67%	74%
June	76%	9%	30%	70%	81%	79%
July	75%	18%	48%	77%	82%	73%
August	75%	24%	56%	76%	75%	84%
September	73%	26%	63%	71%	73%	80%
October	50%	27%	48%	48%	52%	53%
November	31%	25%	34%	33%	40%	39%
December	26%	23%	27%	34%	38%	32%

*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 is presented as a percentage of the number of available units (see p18). 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.

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 28th February 2026). 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 in 2024 has increased from a low of 37% in January 2024 to a peak of 84% in August 2024. Since August 2024 occupancy has fallen. Specifically during Q4 2024 an occupancy of 53% was recorded in October 2024, 39% in November 2024 and 32% in December 2024, which compares with occupancy of 52% in October 2023, 40% in November 2023 and 38% in December 2023.

Additional information began being collected in June 2023, which makes it possible to determine that 17% of open units in October 2024 were occupied by long-stay guests. In November 27% of open units were occupied by long-stay guests and in December 35% of open units were occupied by long-stay guests. This means that long-stay guests represented just over 11 percentage points of the 32% occupancy of open units in December 2024, which means if long stay guests were excluded from occupancy figures, the occupancy in December would be 20%.

6.1 Visitors - day trip visitors by aeroplane and ferry

Visitors on day trips are asked what the main purpose of their trip to Guernsey is within the passenger exit surveys. Survey results are applied to overall passenger volumes to give figures for the whole quarter.

During Q4 2024, 23% of all visitors on a day trip to Guernsey, 771 people, reported the main purpose of their trip to Guernsey was for leisure (2,723 people in Q4 2019 and 1,502 people in Q4 2023). 177 visitors who visited Guernsey on a day trip, 5% of day trippers, cited they were seeing friends/family (168 in Q4 2019 and 248 in Q4 2023), 1,798 were here for business, 54% of all day trip visitors, (2,544 in Q4 2019 and 1,620 in Q4 2023) and 611 day trip visitors (18%) were here for other reasons (1,035 in Q4 2019 and 1,519 in Q4 2023).

Comparison between Q4 2024, Q4 2023 and Q4 2019 reveals that in Q4 2024 there were 72% fewer day trippers visiting for leisure purposes than Q4 2019 and 49% fewer than Q4 2023. 6% more day visitors cited they were seeing friends/family than Q4 2019 but 29% fewer than Q4 2023. In Q4 2024 there were 29% fewer day visitors who travelled for business/work compared with Q3 2019, but 11% more than Q4 2023.

Figure 6.1.1 Main purpose of trip of day trip visitors

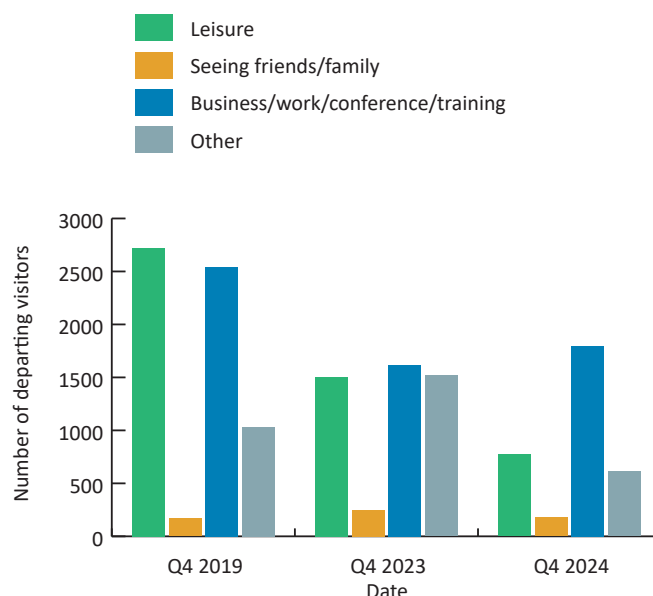


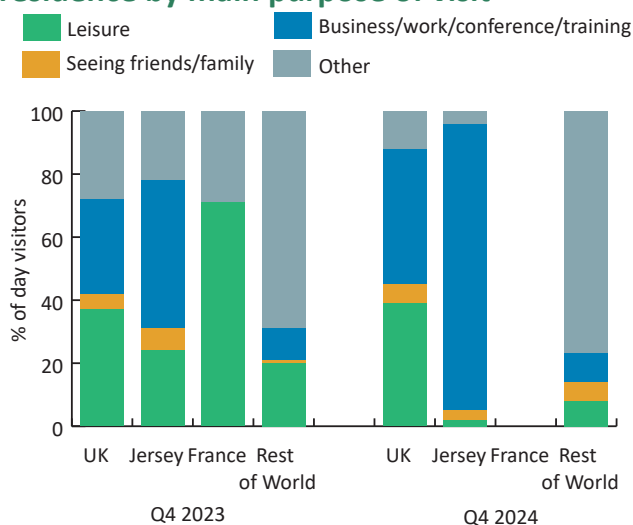
Table 6.1.1 Main purpose of trip of day trip visitors

	Q4 2019	Q4 2023	Q4 2024	Annual % change	5 yr % change
Leisure (e.g. holiday/vacation/break)	2,723	1,502	771	-49%	-72%
Seeing friends/family (including weddings, funerals etc)	168	248	177	-29%	6%
Business/work/conference/training	2,544	1,620	1,798	11%	-29%
Other	1,035	1,519	611	-60%	-41%
Total	6,470	4,889	3,357	-31%	-48%

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

6.1 Visitors - day trip visitors by aeroplane and ferry continued

Figure 6.1.2 Day trip visitors - country of residence by main purpose of visit



A further breakdown for day trip visitors by country of residence and main purpose of visit, is provided in **Figure 6.1.2** and **Tables 6.1.2** and **6.1.3**. The analysis presented on this page is based on visitors travelling to Guernsey by aeroplane and ferry only and does not include those visiting by cruise ship.

In Q4 2024, 39% of day trip visitors from the UK reported the main purpose of their day trip to Guernsey was for leisure, compared with 37% in Q4 2023. 43% of day trip visitors from the UK were here for business purposes, compared with 31% in Q4 2023, and 12% of day trip visitors from the UK were in Guernsey for other reasons.

Table 6.1.2 Q4 2023 Day trip visitors - country of residence by main purpose of visit

	UK (%)	Jersey (%)	France (%)	Rest of World (%)
Leisure (e.g. holiday/vacation/break)	37	24	71	20
Seeing friends/family (including weddings, funerals etc)	5	7	0	<1
Business/work/conference/training	31	47	0	10
Other	28	22	29	69
Total	100	100	100	100

The principal reason for day trip visits in Q4 2024 from those whose country of residence is Jersey was business, 91%; this compares with 47% in Q4 2023. 2% of day trip visitors whose country of residence is Jersey visited for leisure purposes in Q4 2024, which compares with 24% in Q4 2023.

There were no exit surveys undertaken with day trip visitors whose country of residence was France during Q4 2024. This is most likely due to very limited day trip opportunities from France during Q4 2024.

8% of day trip visitors to Guernsey during Q4 2024 whose country of residence was the Rest of the world reported they were in Guernsey for leisure, compared with 20% in Q4 2023. 76% of day trip visitors from the Rest of the world were in Guernsey for other purposes during Q4 2024. The other category includes visitors to Guernsey in transit, visitors on a school trip/visit, sports participants, sports spectators and visitors in Guernsey for medical/hospital purposes.

Table 6.1.3 Q4 2024 Day trip visitors - country of residence by main purpose of visit

	UK (%)	Jersey (%)	France (%)	Rest of World (%)
Leisure (e.g. holiday/vacation/break)	39	2	-	8
Seeing friends/family (including weddings, funerals etc)	6	3	-	6
Business/work/conference/training	43	91	-	9
Other	12	4	-	76
Total	100	100	-	100

NB: Figures may not sum exactly to 100 due to rounding.

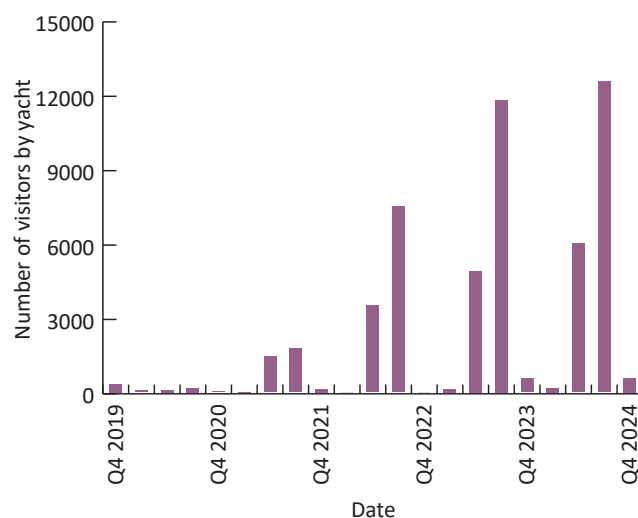
7.1 Visitors - yacht trip visitors

Guernsey Harbours collect comprehensive information on the number of visiting yachts, the number of yacht passengers and the number of nights spent by visiting yacht vessels in Guernsey during each quarter. As shown in **Figure 6.1.1**, the number of visitors by yacht displays seasonality. Higher numbers of visitors by yacht are typically recorded during Quarter 2 and Quarter 3 each year, whilst much lower numbers of visitors by yacht are recorded during Quarter 1 and Quarter 4. For this reason, comparisons of yacht visitor volumes are made with the equivalent periods in previous years.

The number of visitors travelling to Guernsey by yacht totalled 588 people in Q4 2024, 5% higher than Q4 2023 and 206% higher than Q4 2019. It should be noted that percentage changes for yacht visitors during Q4 are based on low numbers travelling to Guernsey by yacht at this time of year. The number of visiting yacht vessels during Q4 2024 totalled 210 vessels and compares with 227 vessels in Q4 2023 and 102 vessels in Q4 2019.

The total length of stay by visiting yachts during Q4 2024 was 431 nights - equating to an average length of stay of 2.1 nights per vessel. By comparison the total length of stay by visiting yachts during Q4 2023 was 446 nights - equating to an average length of stay of 2.0 nights per vessel.

Figure 6.1.1 Visitors by yacht



NB: Between Q1 2019 and Q1 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.

Table 7.1.1 Yacht visitors, yacht vessels, nights and length of stay for vessels

	Q4 2019	Q4 2023	Q4 2024	Annual % change	5 yr % change
Visitors by yacht	192	562	588	5%	206%
Visiting yacht vessels	102	227	210	-7%	106%
Total number of nights (vessels)	*	446	431	-3%	*
Average length of stay per vessel	*	2.0	2.1	4%	*

* This data was not collected in 2019

NB: Between Q1 2019 and Q1 2023 the exact number of people visiting by yacht was unknown, but an estimate has been inferred from the number of visiting yachts and the average number of people each vessel typically has on board.

8.1 Visitors - cruise ship visitors

Guernsey Harbours collect comprehensive information on the number of cruise ship passengers that chose to visit Guernsey, the number of cruise ships and the total number of cruise ship passengers aboard each ship each quarter. 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. All COVID-19 related travel restrictions were lifted on 17th February 2022.

As shown in **Figure 8.1.1**, the number of visitors by cruise ship to Guernsey displays seasonality. Far higher numbers of visitors by cruise ship are typically recorded during Q2 and Q3 each year, whilst very low numbers of visitors by cruise ship are recorded during Q1 and Q4. It should be noted that percentage changes for cruise ship visitors during Q4 can fluctuate significantly as they are based on low numbers visiting Guernsey by cruise ship at this time of year, with the last cruise visit (weather dependent) typically scheduled for the start of October.

The number of visitors that came ashore in Guernsey by cruise ship totalled 180 people in Q4 2024, 97% lower than Q4 2023 and 14% higher than Q4 2019. One cruise ship visited during Q4 2024, four had been planned but three were cancelled due to weather. The total number of passengers on board totalled 185 in Q4 2024, and 97% came ashore.

Figure 8.1.1 Visitors by cruise ship

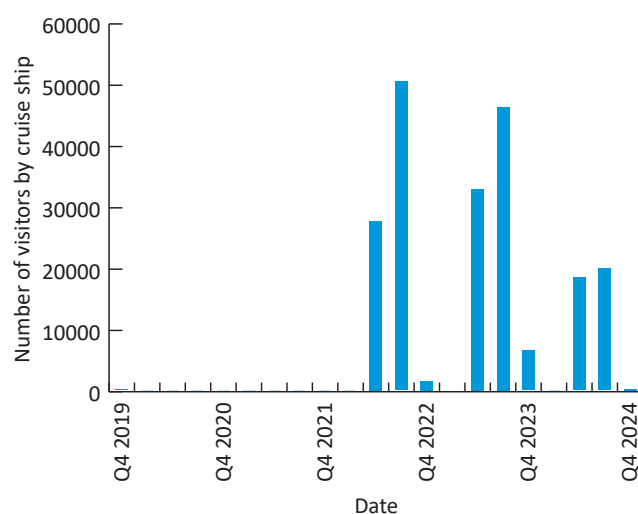


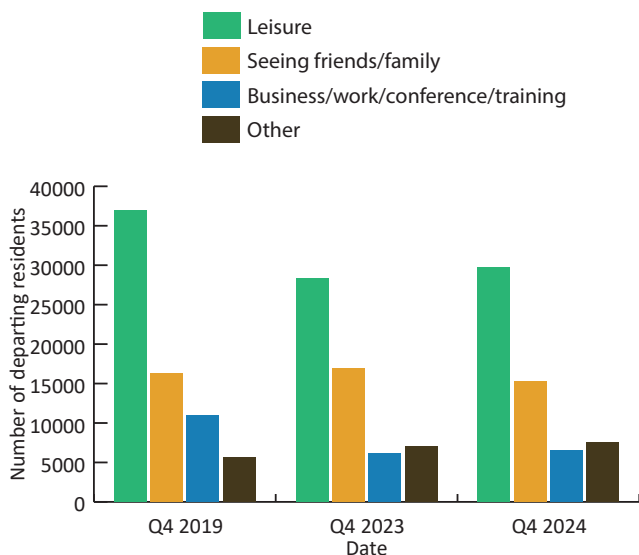
Table 8.1.1 Visitors by cruise ship

	Q4 2019	Q4 2023	Q4 2024	Annual change	5 yr change
Visitors by cruise ship	158	6,474	180	-97%	14%
Total passengers on board visiting cruise ships	*	7,537	185	-98%	*
Proportion of total cruise ship passengers that came ashore in Guernsey	*	86%	97%	+11 ppts	*
Number of planned cruise ship visits	*	4	4	0%	*
Number of actual cruise ship visits	*	4	1	-75%	*

* This data was not collected in 2019

9.1 Residents - main purpose of trip away from Guernsey

Figure 9.1.1 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 quarter.

The total number of departing residents in Q4 2024 was 58,976; 1% higher than Q4 2023, but 15% lower than Q4 2019.

In Q4 2024, 50%, 29,685 residents reported the main purpose of their trip away from Guernsey was for leisure, 20% lower than the 36,948 residents who reported they were travelling for leisure in Q4 2019, but 5% higher than the 28,335 residents travelling for leisure purposes in Q4 2023.

26% of all residents, 15,250 people cited they were seeing friends/family, 6% lower than the 16,280 who reported they were travelling to see friends/family in Q4 2019 and 10% lower than the 16,894 residents travelling to see friends/family in Q4 2023.

11%, 6,467 residents were leaving on business (41% lower than the 10,921 residents in Q4 2019, but 6% higher than the 6,110 residents travelling for business in Q4 2023) and 13%, 7,573 were leaving for other reasons (5,621 in Q4 2019). Other reasons include residents travelling for medical/hospital purposes, residents participating in sport and residents on a school trip/visit.

Table 9.1.1 Residents - main purpose of trip away from Guernsey

	Q4 2019	Q4 2023	Q4 2024	Annual % change	5 yr % change
Leisure (e.g. holiday/vacation/break)	36,948	28,335	29,685	5%	-20%
Seeing friends/family (including weddings, funerals etc)	16,280	16,894	15,250	-10%	-6%
Business/work/conference/training	10,921	6,110	6,467	6%	-41%
Other	5,621	7,015	7,573	8%	35%
Total	69,770	58,354	58,976	1%	-15%

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

9.2 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 quarter.

The majority, 82% of residents, 48,452 people were travelling to the UK in Q4 2024, (in Q4 2023 the equivalent figure was also 82% of residents but 47,845 people).

13% of residents travelled to Jersey, 7,379 people. For Q4 2023 this was 12% of residents and 7,134 people. The number of residents travelling to Jersey during Q4 2024 was 35% lower than for Q4 2019, but 3% higher than Q4 2023. 5% of residents, 3,145 people travelled elsewhere during Q4 2024 (6%, 3,375 residents travelled elsewhere in Q4 2023), 196% higher than Q4 2019 but 7% lower than Q4 2023.

75% of all those surveyed during Q4 2024 stated that their final destination was nearby to the airport/port travelled to. Residents travelling to London Gatwick were most likely to state that their final destination was not nearby; 50% said their final destination was nearby.

Day trips accounted for 12% of all residents' trips during Q4 2024, in Q4 2023 it was 6%. The average length of trip by residents during Q4 2024 was 6.1 nights, and compares with 6.4 nights during Q4 2023.

Figure 9.2.1 Residents - destination port Q4 2023

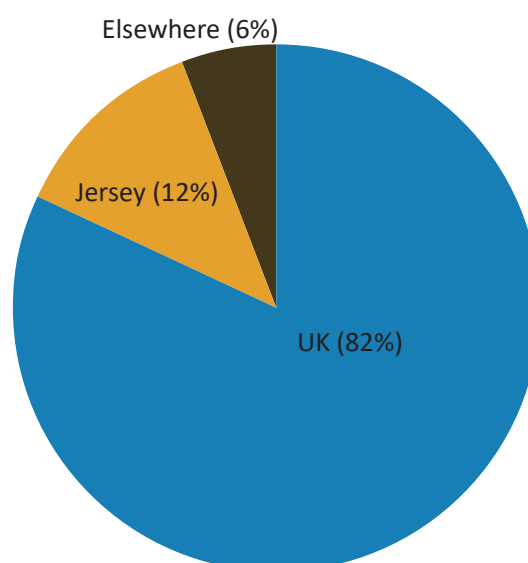


Figure 9.2.2 Residents - destination port Q4 2024

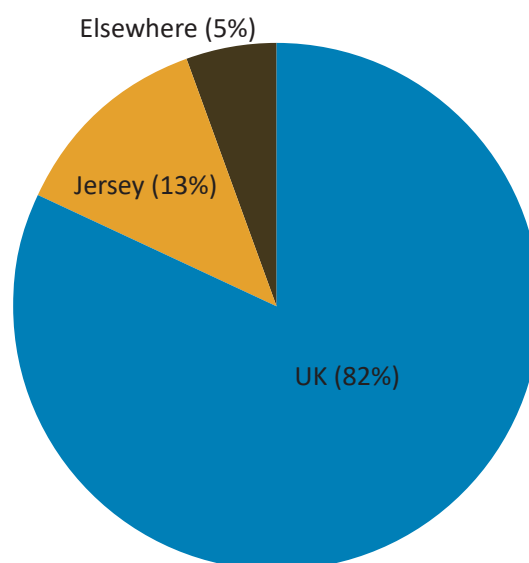


Table 9.2.1 Residents - destination port

	Q4 2019	Q4 2023	Q4 2024	Annual % change	5 yr % change
United Kingdom	57,401	47,845	48,452	1%	-16%
Jersey	11,307	7,134	7,379	3%	-35%
Rest of world	1,061	3,375	3,145	-7%	196%
Total	69,770	58,354	58,976	1%	-15%

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

7.1 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 Q4 2024, 5,581 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 9,761 passengers, which is 11% of the total number of passengers departing Guernsey during Q4 2024 (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. This quarter there were 5,581 interviews conducted and it was found that 35% of respondents were departing visitors. With a 95% confidence level, the margin of error is plus or minus 1%. In other words, there is a 95% probability that the proportion of departing visitors lies within the range of 34% to 36%. As the sample sizes decrease (for individual routes, purposes of visit and types of accommodation for example), so the margin of error increases.

Each month, visitor accommodation providers with active permits are also asked to provide data on the availability and occupancy of their accommodation units. The responses received in October, November and December 2024 include various different accommodation types and sizes and statistics for these months are accurate to within at least plus or minus 2% (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.

7.2 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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