

Guernsey Quarterly Travel and Visitor Accommodation Bulletin

Quarter 3 2023

Issue date 21st November 2023

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

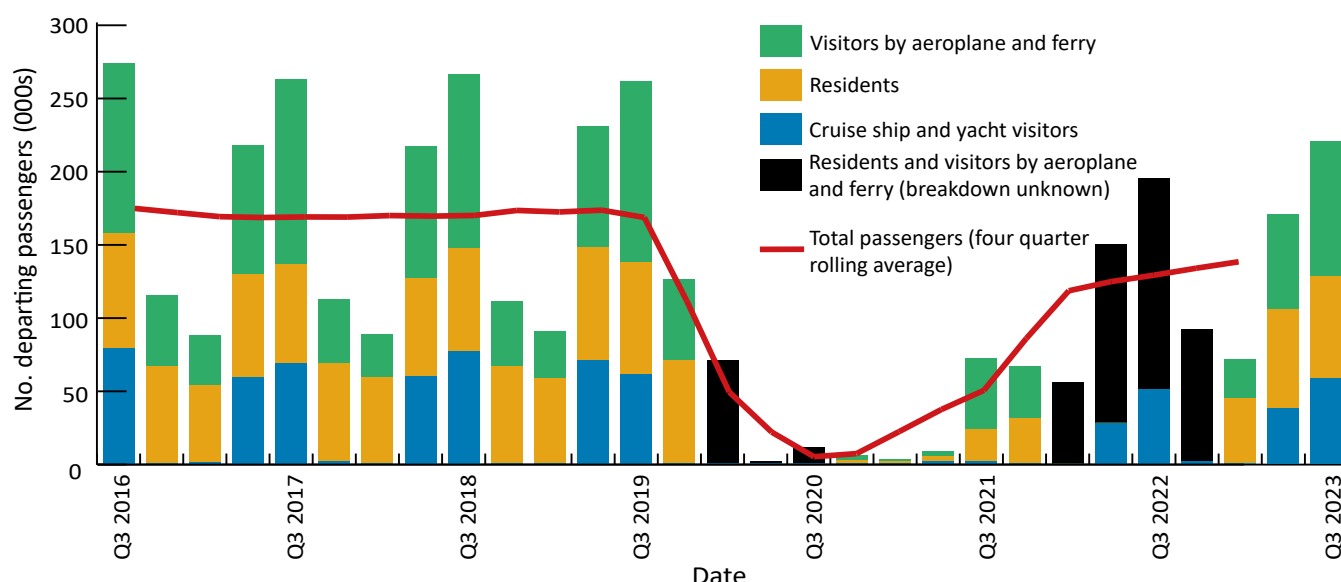
The Guernsey Quarterly Travel and Visitor Accommodation Bulletin provides information on visitors to the Island of Guernsey and the accommodation they stayed in, as well as Guernsey residents travelling to destinations outside the Bailiwick. It uses data gathered via surveys of people leaving Guernsey,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

This is the third 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



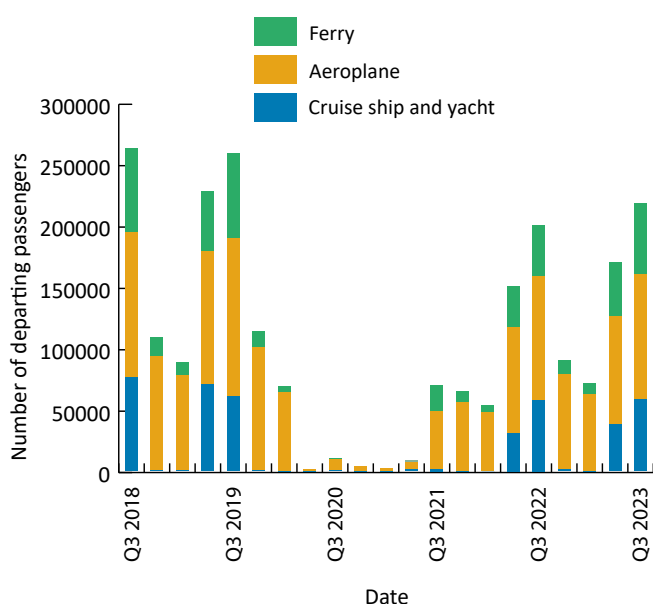
COVID-19 related requirements were put in place for people travelling into Guernsey in February 2020 and remained in place throughout 2021 with no non-essential travel allowed between 12th March 2020 and 20th May 2020 or between 14th January 2021 and 22nd March 2021. The requirements varied depending 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 and 2023. 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)

- The total number of (resident and visiting) passengers (including any cruise and yacht passengers) departing Guernsey was 219,167 during quarter three 2023. This compares with 214,995 during quarter three 2022; an increase of 2%. However, it is 16% lower than in quarter three 2019.
- During the third quarter of 2023, 46% of passengers departed by aeroplane, 27% by ferry and 26% by cruise ships or yachts. In the third quarter of 2019 the breakdown was: 49% of passengers departing by aeroplane, 27% by ferry, and 23% 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.
- 53% of departing passengers were going to an air or sea port in the UK, 9% Jersey, 12% rest of the world and 26% were on a cruise ship or yacht trip during Q3 2023.
- The total number of departing visitors (including any cruise and yacht passengers), for Q3 2023 was 149,630; 19% lower than Q3 2019. The total number of departing visitors (excluding any cruise and yacht passengers), for Q3 2023 was 91,591; 26% lower than Q3 2019. The total number of departing residents was 68,839; 9% lower than Q3 2019.
- Of the residents, the main purpose of their trip away was leisure for 61% (42,026 people). On average, residents, staying away at least one night, spent 7 nights away from Guernsey per trip in Q3 2023.
- Of the visitors: 37% were mainly visiting for leisure, 14% were mainly seeing friends or family, 4% were visiting for business purposes, 5% were visiting for another main purpose, less than 1% were long stay visitors (staying more than 30 nights but less than 1 year) and 39% were on a cruise ship or yacht trip.
- 43% of visitors during Q3 2023 were from the UK, 5% from France, 4% from Jersey and 9% from elsewhere (including Alderney, Sark and Herm). The country of residence was unknown for the 39%, who were visiting on a yacht or cruise ship.
- 11% of all visitors had visited Guernsey on a day trip and 39% on a cruise ship or yacht trip during Q3 2023, whereas 49% had stayed ashore in Guernsey for one to 30 nights and less than 1% had stayed for 31 nights or more. The average length of stay for those who stayed at least one night but 30 or less nights in Q3 2023, was 5.5 nights. 77% of the visitors that stayed overnight stayed in visitor accommodation, whereas 23% stayed with friends or relatives.
- 57% of all visitors leaving by aeroplane or ferry had visited Guernsey before (and of those, 3% had visited before on a cruise).
- There were 1,902 units of visitor accommodation available for booking in July, August and September 2023. The occupancy of available units was 82% in July, 75% in August and 73% in September 2023. It should be noted that visitor accommodation could be occupied by visitors or residents during 2023. See [page 18](#) for information on the capacity of the visitor accommodation over time in terms of maximum numbers of people that can be accommodated.
- The net promoter score given by visitors leaving by aeroplane or ferry was 66 percentage points. Higher scores (of 78 and 69 percentage points respectively) were given by visitors seeing friends/family and those visiting for leisure than by those visiting for business/work/conference/training (31 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** 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 the equivalent periods in previous years. Total departing passengers in Q3 2023, as shown in **Table 2.1.1**, was 219,167, 2% higher than Q3 2022, but 16% lower than pre COVID-19 passenger volumes in Q3 2019.

46% of all departing passengers travelled by aeroplane in Q3 2023, 101,890 people, 1% higher than Q3 2022 but 21% lower than Q3 2019. 27% of all passengers travelled by ferry in Q3 2023, 59,238 people, 5% higher than Q3 2022 but 16% lower than Q3 2019.

Table 2.1.1 Passenger volumes

	Q3 2019	Q3 2020	Q3 2021	Q3 2022	Q3 2023	Annual % change	4 yr % change
Passengers departing Guernsey by aeroplane	128,629	9,012	46,530	100,971	101,890	1%	-21%
Passengers departing Guernsey by ferry	70,741	2,299	23,102	56,162	59,238	5%	-16%
Passengers departing Guernsey by cruise ship and yacht	60,999	187*	1,768*	57,862*	58,039	<1%	-5%
Total departing passengers	260,369	11,498	71,400	214,995	219,167	2%	-16%

*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 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.

53% of all passengers departed Guernsey for the UK, totalling 115,540 people in Q3 2023, 2% higher than Q3 2022 but 16% lower than Q3 2019. 9% of all passengers departing Guernsey were travelling to Jersey and totalled 19,883 people in Q3 2023, 7% higher than Q3 2022 but 39% lower than Q3 2019. 12% of passengers departed Guernsey for the rest of the world and totalled 25,705 people in Q3 2023, 1% higher than Q3 2022 and 10% lower than Q3 2019. 26% of passengers departed Guernsey on a cruise or yacht trip in Q3 2023, 58,039 people.

Figure 2.2.1 Passenger volumes by destination

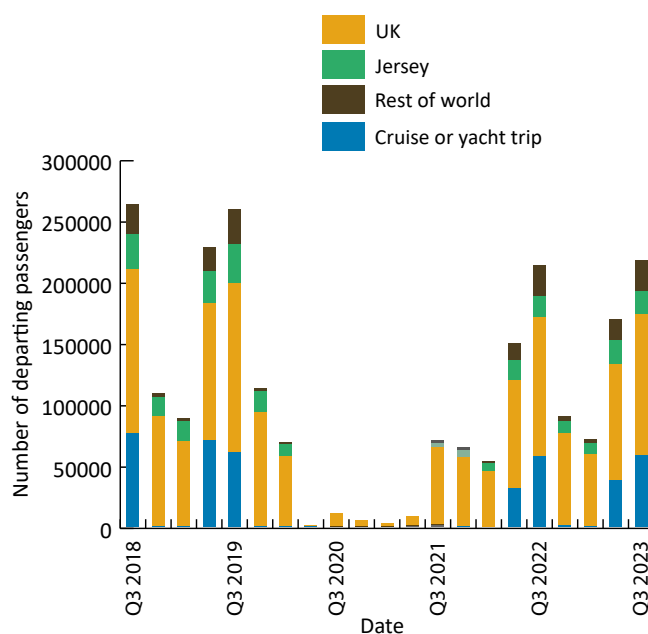


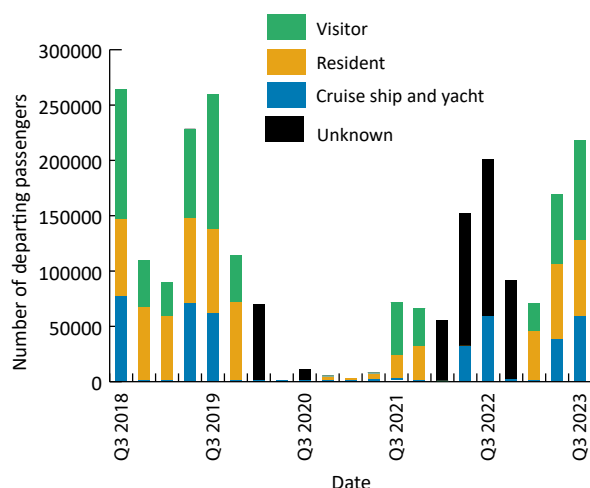
Table 2.2.1 Passenger volumes by destination

	Q3 2019	Q3 2020	Q3 2021	Q3 2022	Q3 2023	Annual % change	4 yr % change
Passengers departing Guernsey for United Kingdom	137,939	10,799	63,494	112,995	115,540	2%	-16%
Passengers departing Guernsey for Jersey	32,721	369	4,382	18,581	19,883	7%	-39%
Passengers departing Guernsey for rest of world	28,710	143	1,756	25,557	25,705	1%	-10%
Passengers departing Guernsey on cruise or yacht trip	60,999	187*	1,768*	57,862*	58,039	<1%	-5%
Total departing passengers	260,369	11,498	71,400	214,995	219,167	2%	-16%

*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 - 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. 6.9% of departing passengers were surveyed in Q3 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 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

	Q3 2019	Q3 2020	Q3 2021	Q3 2022	Q3 2023	4 yr % change
Residents departing Guernsey by aeroplane	60,361	-	14,192	-	52,269	-13%
Residents departing Guernsey by ferry	15,071	-	7,046	-	16,569	10%
Visitors departing Guernsey by aeroplane	67,712	-	32,338	-	49,148	-27%
Visitors departing Guernsey by ferry	55,300	-	16,056	-	42,443	-23%
Visitors departing Guernsey by cruise ship and yacht	60,999	187*	1,768*	57,862*	58,039	-5%
Total departing residents	75,432	-	21,238	-	68,839	-9%
Total departing visitors	184,011	-	50,162	-	149,630	-19%
Total visitors returning to Guernsey later	926	-	-	-	698	-25%

*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 - visitors and residents

As shown in **Table 2.3.1** and **Figure 2.3.1** 68,839 passengers, 31% of those departing Guernsey in Q3 2023 were residents, whilst 68% of those departing Guernsey were visitors (149,630 passengers). A small proportion, less than 1%, 698 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 quarter. In Q3 2023, 76%, 52,269 residents travelled by aeroplane, the remainder, 24%, 16,569 residents travelled by ferry. The number of residents travelling by aeroplane in Q3 2023 was 13% lower than the number travelling by aeroplane in Q3 2019. The number of residents travelling by ferry in Q3 2023 was 10% higher than the number travelling by ferry in Q3 2019.

Figure 2.3.3 shows the volume of visitors travelling by ferry, aeroplane, cruise ship/visiting yacht each quarter. In Q3 2023, 33%, 49,148 visitors travelled by aeroplane, 28%, 42,443 visitors travelled by ferry and 39%, 58,039 people travelled by visiting yacht or cruise ship. The number of visitors travelling by aeroplane in Q3 2023 was 27% lower than the number travelling by aeroplane in Q3 2019. The number of visitors travelling by ferry in Q3 2023 was 23% lower than the number travelling by ferry in Q3 2019.

Figure 2.3.2 Resident passenger volumes

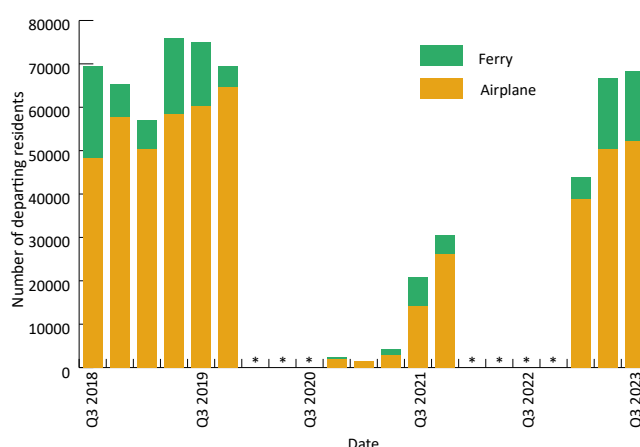
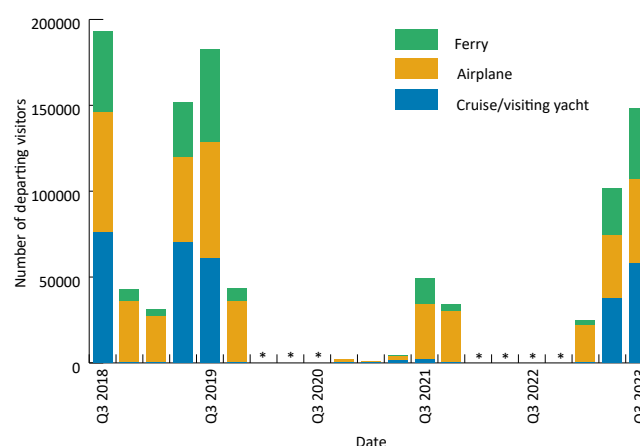


Figure 2.3.3 Visitor passenger volumes



*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

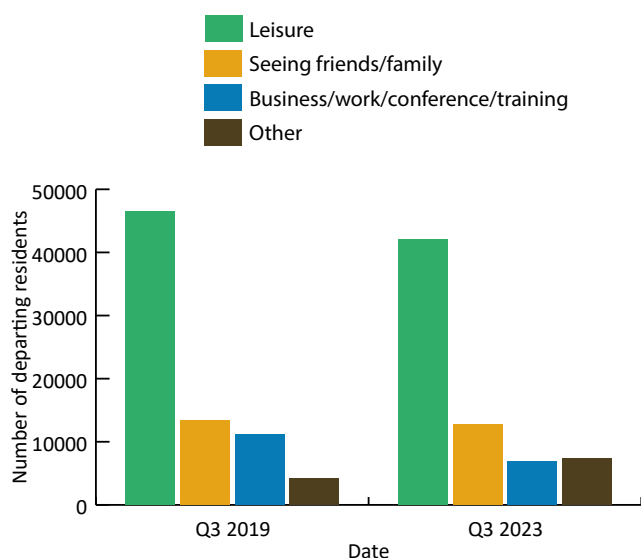


Table 3.1.1 Residents - main purpose of trip away from Guernsey

	Q3 2019	Q3 2023	4 yr % change
Leisure (e.g. holiday/vacation/break)	46,740	42,026	-10%
Seeing friends/family (including weddings, funerals etc)	13,357	12,684	-5%
Business/work/conference/training	11,159	6,828	-39%
Other	4,176	7,300	75%
Total	75,432	68,839	-9%

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

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.

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.

In Q3 2023, 61%, 42,026 residents reported the main purpose of their trip away from Guernsey was for leisure, 10% lower than the 46,740 residents who reported they were travelling for leisure in Q3 2019. 18% of all residents, 12,684 people cited they were seeing friends/family, 5% lower than the 13,357 who reported they were travelling to see friends/family in Q3 2019. 10%, 6,828 residents were leaving on business (39% lower than the 11,159 in Q3 2019) and 11%, 7,300 were leaving for other reasons (4,176 in Q3 2019). Other reasons include residents travelling for medical/hospital purposes, residents participating in sport and residents on a school trip/visit.

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 quarter.

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.

The majority, 71% of residents, 48,761 people were travelling to the UK in Q3 2023, (in Q3 2019 the equivalent figure was 74% of residents and 55,503 people).

11% of residents travelled to Jersey, 7,587 people, for Q3 2019 this was 20% of residents and 14,747 people. The number of residents travelling to Jersey during Q3 2023 was 49% lower than for Q3 2019. 18% of residents, 12,491 people travelled elsewhere during Q3 2023 (7%, 5,182 residents travelled elsewhere in Q3 2019), 141% higher than Q3 2019.

74% of all those surveyed during Q3 2023 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; 33% said their final destination was nearby.

Day trips accounted for 8% of all residents trips during Q3 2023. The average length of trip by residents during Q3 2023 was 7 nights.

Figure 3.2.1 Residents - destination port Q3 2019

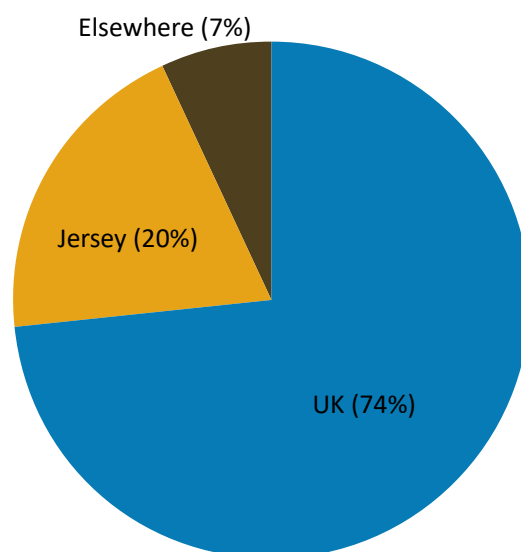


Figure 3.2.2 Residents - destination port Q3 2023

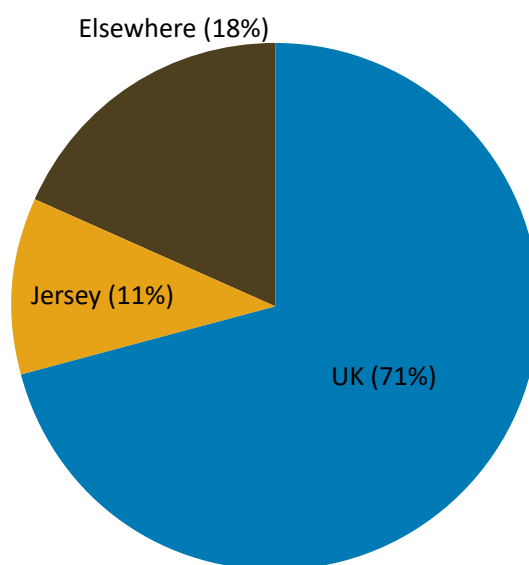


Table 3.2.1 Residents - destination port

	Q3 2019	Q3 2023	4 yr % change
United Kingdom	55,503	48,761	-12%
Jersey	14,747	7,587	-49%
Rest of world	5,182	12,491	141%
Total	75,432	68,839	-9%

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

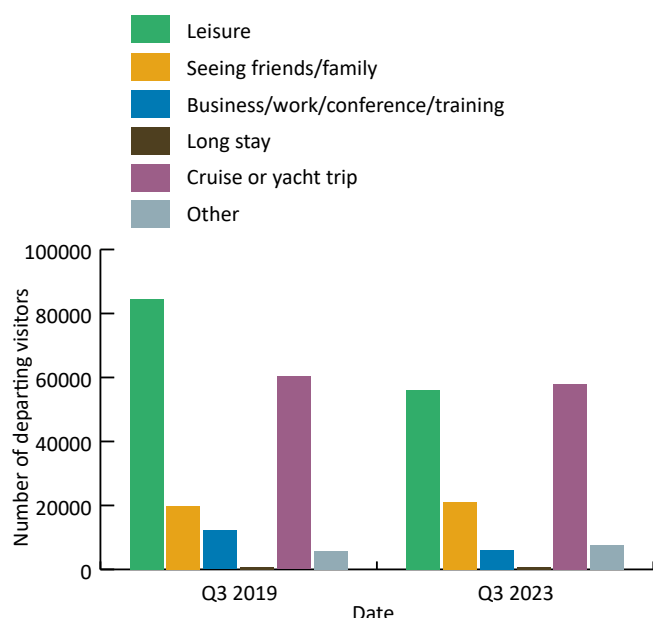


Table 4.1.1 Visitors - main purpose of trip to Guernsey

	Q3 2019	Q3 2023	4 yr % change
Leisure (e.g. holiday/vacation/break)	84,555	56,072	-34%
Seeing friends/family (including weddings, funerals etc)	19,795	21,181	7%
Business/work/conference/training	12,178	6,009	-51%
Long stay (more than 30 nights but less than 1 year for work/other purpose)	738	649	-12%
Cruise or yacht trip*	60,999	58,039	-5%
Other	5,746	7,680	34%
Total	184,011	149,630	-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.

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 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.

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.

In Q3 2023, 56,072 visitors reported the main purpose of their trip to Guernsey was for leisure (84,555 in Q3 2019). 21,181 visitors cited they were seeing friends/family (19,795 in Q3 2019), 6,009 were here for business (12,178 in Q3 2019) and 7,680 were here for other reasons (5,746 in Q3 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.

58,039 visitors to Guernsey during Q3 2023 visited by yacht or cruise ship. 649 visitors during Q3 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. 57% of all visitors to Guernsey during Q3 2023 said they had visited Guernsey before. Of those that had previously visited Guernsey, 3% had visited Guernsey on a cruise.

4.2 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.

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.

During Q3 2023, 43% of all visitors, 63,885 people reported their country of residence was the UK (43%, 79,798 in Q3 2019). 5%, 8,025 visitors were from France (9%, 15,838 in Q3 2019). 4%, 5,968 visitors were from Jersey (3%, 6,201 in Q3 2019), 9%, 13,713 visitors were from the Rest of the world (12%, 21,175 in Q3 2019), and 39%, 58,039 visitor's country of residence was unknown, as they were visiting by cruise ship or yacht (33%, 60,999 in Q3 2019).

Figure 4.2.1 Visitors - country of residence Q3 2019

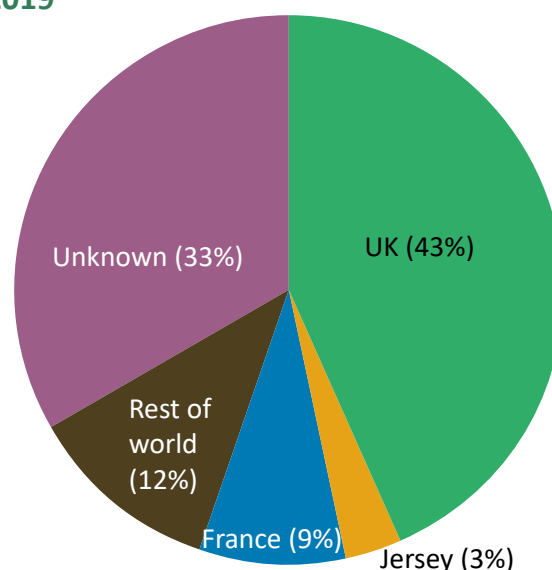


Figure 4.2.2 Visitors - country of residence Q3 2023

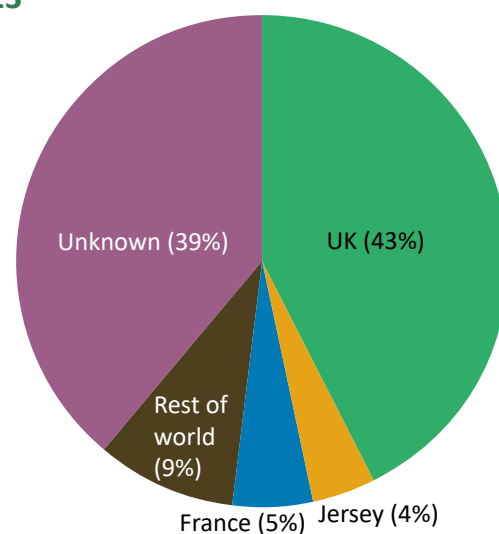


Table 4.2.1 Visitors - country of residence

	Q3 2019	Q3 2023	4 yr % change
United Kingdom	79,798	63,885	-20%
Jersey	6,201	5,968	-4%
France	15,838	8,025	-49%
Rest of world	21,175	13,713	-35%
Unknown (cruise ship and yacht passengers)*	60,999	58,039	-5%
Total	184,011	149,630	-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.

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

4.3 Visitors - length of stay in Guernsey

Figure 4.3.1 Visitors - length of stay in Guernsey Q3 2019

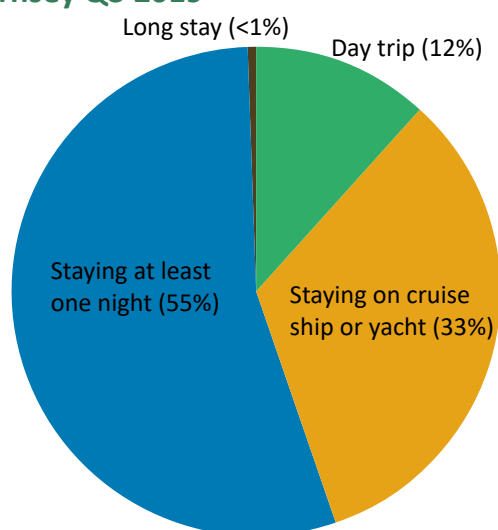


Figure 4.3.2 Visitors - length of stay in Guernsey Q3 2023

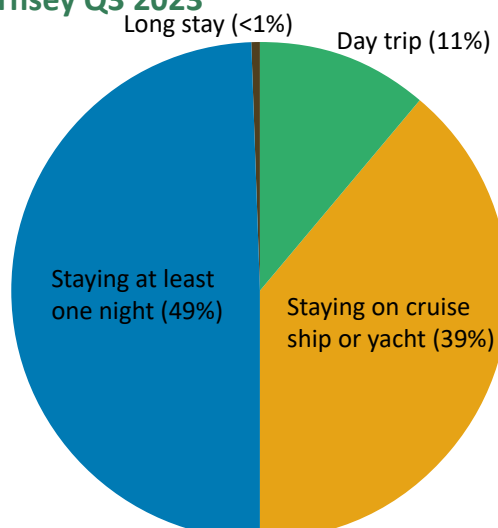


Table 4.3.1 Visitors - length of stay in Guernsey

	Q3 2019	Q3 2023	4 yr % change
Day trip to Guernsey	21,768	16,998	-22%
Staying on a cruise ship or yacht*	60,999	58,039	-5%
Staying at least one night in Guernsey (but 30 or less nights)	100,506	73,944	-26%
Long stay (more than 30 nights but less than 1 year)	738	649	-12%
Total	184,011	149,630	-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.

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.

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.

In Q3 2023, 16,998 people visited Guernsey on a day trip, representing 11% of all visitors (21,768 people, 12% in Q3 2019). The majority, 49% of visitors, 73,944 people, stayed at least one night but less than 31 nights (100,506 people, 55% in Q3 2019). During Q3 2023 less than 1% of visitors were long stay visitors (649 people).

Comparison between Q3 2023 and Q3 2019 reveals that in Q3 2023 there were 22% fewer visitors on a day trip, 26% fewer visitors staying at least one night (but less than 31 nights) and 12% fewer long stay visitors, compared with Q3 2019.

The average length of stay for visitors staying at least one night but less than 31 nights was 5.5 nights in Q3 2023, equating to 403,723 bed nights, and compares with 5.2 nights, and 519,137 bed nights in Q3 2019.

4.4 Visitors - main purpose of trip of day trip visitors

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.

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.

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.

During Q3 2023, 15% of all visitors on a day trip to Guernsey, 11,399 people, reported the main purpose of their trip to Guernsey was for leisure (21% lower than the 14,495 people who reported their day trip was for leisure purposes in Q3 2019). 687 visitors who visited Guernsey on a day trip, less than 1% of day trippers, cited they were seeing friends/family (543 in Q3 2019), 1,272 were here for business, 2% of all day trip visitors, (3,261 in Q3 2019) and 3,640 day trip visitors (5%) were here for other reasons (3,469 in Q3 2019).

Comparison between Q3 2023 and Q3 2019 reveals that in Q3 2023 there were 21% fewer day trippers visiting for leisure purposes, 26% more day visitors seeing friends/family, 61% fewer day visitors travelling for business/work and 5% more day visitors travelling for other reasons, compared with Q3 2019.

Figure 4.4.1 Main purpose of trip of day trip visitors

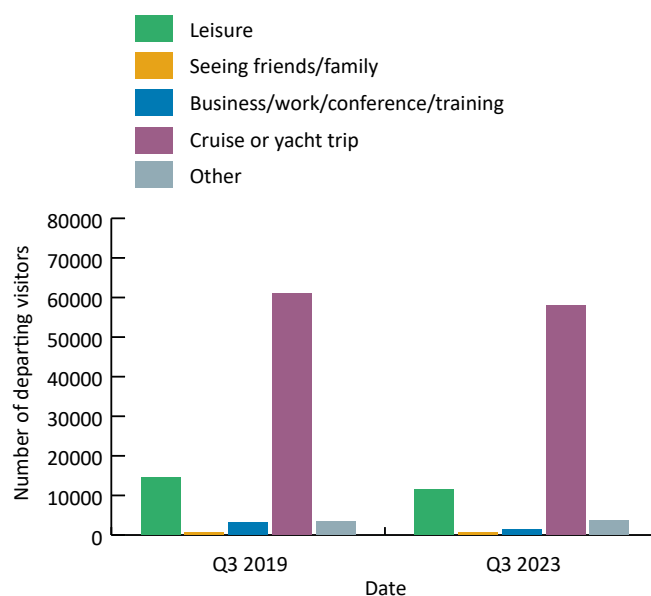


Table 4.4.1 Main purpose of trip of day trip visitors

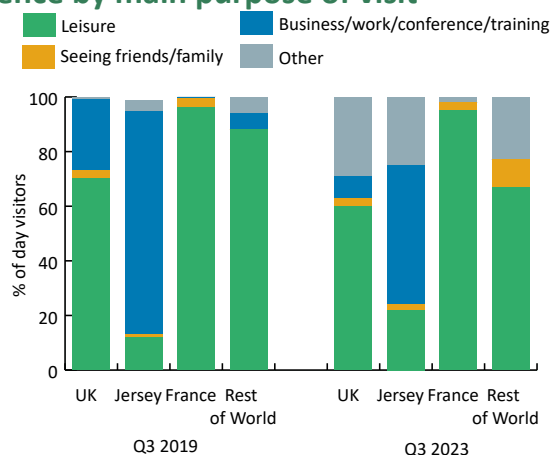
	Q3 2019	Q3 2023	4 yr % change
Leisure (e.g. holiday/vacation/break)	14,495	11,399	-21%
Seeing friends/family (including weddings, funerals etc)	543	687	26%
Business/work/conference/training	3,261	1,272	-61%
Cruise or yacht trip*	60,999	58,039	-5%
Other	3,469	3,640	5%
Total	82,767	75,037	-9%

*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.

4.4 Visitors - country of residence by main purpose of trip of day visitors

Figure 4.4.2 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 4.4.2** and **Tables 4.4.2** and **4.4.3**.

In Q3 2023, 60%, of day trip visitors from the UK reported the main purpose of their day trip to Guernsey was for leisure, compared with 70% in Q3 2019. 8% of day trip visitors from the UK were here for business purposes, compared to 26% in Q3 2019, and 29% of day trip visitors from the UK were in Guernsey for other reasons.

The principal reasons for day trip visits in Q3 2023 from those whose country of residence is Jersey were business reasons 51%; this compares with 82% in Q3 2019.

Visitors from France and the Rest of the World were most likely to report in Q3 2023 that their main purpose of visit was leisure; 95% and 67% respectively. This compares with 96% and 88% of day trip visitors from France and the Rest of the World in Q3 2019.

10% of day trip visitors to Guernsey during Q3 2023 whose country of residence was the Rest of the World reported they were seeing friends/family.

3% of day trip visitors, whose country of residence was France, stated they were seeing friends/family and 2% of those whose country of residence was France were visiting for other purposes during Q3 2023.

Table 4.4.2 Q3 2019 Day trip visitors - country of residence by main purpose of visit

	UK (%)	Jersey (%)	France (%)	Rest of World (%)
Leisure (e.g. holiday/vacation/break)	70	12	96	88
Seeing friends/family (including weddings, funerals etc)	3	1	4	0
Business/work/conference/training	26	82	<1	6
Other	1	4	0	5
Total	100	100	100	100

Table 4.4.3 Q3 2023 Day trip visitors - country of residence by main purpose of visit

	UK (%)	Jersey (%)	France (%)	Rest of World (%)
Leisure (e.g. holiday/vacation/break)	60	22	95	67
Seeing friends/family (including weddings, funerals etc)	3	2	3	10
Business/work/conference/training	8	51	0	0
Other	29	25	2	23
Total	100	100	100	100

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

4.5 Visitors - main purpose of visit of staying visitors

Figure 4.5.1 Main purpose of trip of staying visitors

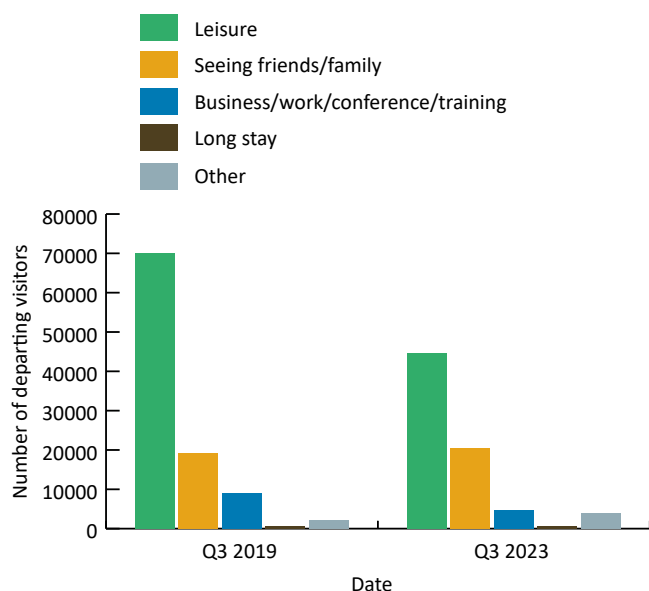


Table 4.5.1 Main purpose of trip of staying visitors

	Q3 2019	Q3 2023	4 yr % change
Leisure (e.g. holiday/vacation/break)	70,060	44,673	-36%
Seeing friends/family (including weddings, funerals etc)	19,252	20,495	6%
Business/work/conference/training	8,917	4,737	-47%
Long stay (more than 30 nights but less than 1 year)	738	649	-12%
Other	2,277	4,040	77%
Total	101,244	74,594	-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.

Visitors staying in Guernsey are also 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.

Those departing on cruise ships or yachts are included in [section 4.4](#) alongside day trip visitors, since they, for the most part, likely stay overnight on their boat rather than ashore in Guernsey.

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.

In Q3 2023, 60% or 44,673 of all staying visitors reported the main purpose of their trip to Guernsey was for leisure (70,060 in Q3 2019). 27% or 20,495 staying visitors cited they were seeing friends/family (a similar level to the 19,252 who reported they were seeing friends/family in Q3 2019), 6%, 4,737 were here for business or work reasons (8,917 in Q3 2019) and 5%, 4,040 were here for other reasons (2,277 in Q3 2019). Less than 1% or 649 visitors were long stay visitors, having stayed more than 30 nights but less than 1 year, in Q3 2023 (738 visitors in Q3 2019).

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

Figure 4.5.2 Staying visitors - country of residence by main purpose of visit

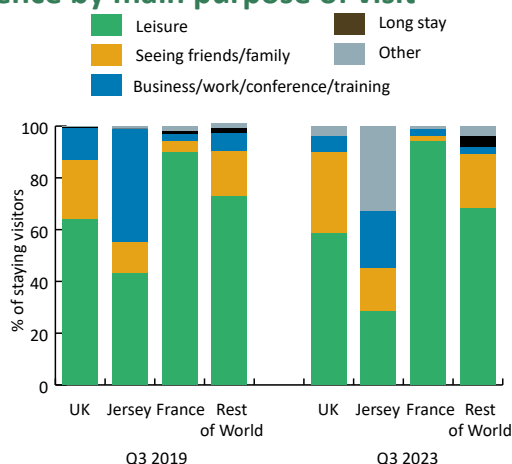


Table 4.5.2 Q3 2019 Staying visitors - country of residence by main purpose of visit

	UK (%)	Jersey (%)	France (%)	Rest of World (%)
Leisure (e.g. holiday/vacation/break)	64	43	90	73
Seeing friends/family (including weddings, funerals etc)	23	12	4	17
Business/work/conference/training	12	44	3	7
Long stay (more than 30 nights but less than 1 year)	<1	0	<1	2
Other	1	1	2	2
Total	100	100	100	100

Table 4.5.3 Q3 2023 Staying visitors - country of residence by main purpose of visit

	UK (%)	Jersey (%)	France (%)	Rest of World (%)
Leisure (e.g. holiday/vacation/break)	59	29	94	68
Seeing friends/family (including weddings, funerals etc)	32	17	2	21
Business/work/conference/training	6	22	3	3
Long stay	<1	0	0	3
Other	4	33	1	4
Total	100	100	100	100

A further breakdown for staying visitors, by country of residence and main purpose of visit, is provided in **Figure 4.5.2** and **Tables 4.5.2** and **4.5.3**.

In Q3 2023, the majority, 59%, of staying visitors from the UK reported the main purpose of their trip to Guernsey was leisure, compared with 64% in Q3 2019. 32% of staying visitors from the UK were here to see friends/family, compared to 23% in Q3 2019, and 6% of staying visitors from the UK were in Guernsey for business/work reasons.

The principal reasons for staying visits in Q3 2023 from those with country of residence of Jersey were leisure and business reasons; 29% and 22% respectively. This compares with 43% and 44% in Q3 2019.

Visitors from France were most likely to report in Q3 2023 that their main purpose of visit was leisure, at 94%. This compares with 90% of staying visitors from France in Q3 2019.

There were relatively few staying visitors during Q3 2023 whose country of residence was France and who reported they were seeing friends/family, 2%. 3% cited they were in Guernsey for business purposes.

In Q3 2023, the majority of staying visitors whose country of residence was the Rest of the World reported they were visiting Guernsey for leisure purposes (68%). 21% were seeing friends/family, whilst 3% of staying visitors whose country of residence was the Rest of the World reported they were staying in Guernsey for business reasons.

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

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 quarter. Those visitors staying in Guernsey more than 30 nights (long stay) are excluded from this analysis.

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.

As shown in **Figure 4.6.1**, **Figure 4.6.2** and **Table 4.6.1**, in Q3 2023, 61% of all visitors staying in Guernsey stayed in hotels, (44,927 people), 23% stayed with friends/family (16,979 people) and 16% stayed in other accommodation (12,039 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 Q3 2023 and Q3 2019 reveals that in Q3 2023 there were 26% fewer visitors staying in hotels, 9% fewer visitors staying in friend/family's homes and 43% fewer visitors staying in Other accommodation, compared with Q3 2019.

On average visitors in hotels stayed 4.7 nights in Q3 2023 and equates to 209,275 bed nights (4.1 nights in Q3 2019). During Q3 2023 the average length of stay with friends/family was 6.0 nights, equating to 101,465 bed nights (6.6 nights in Q3 2019) 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 6.6 nights equating to 79,030 bed nights.

Figure 4.6.1 Accommodation for staying visitors Q3 2019

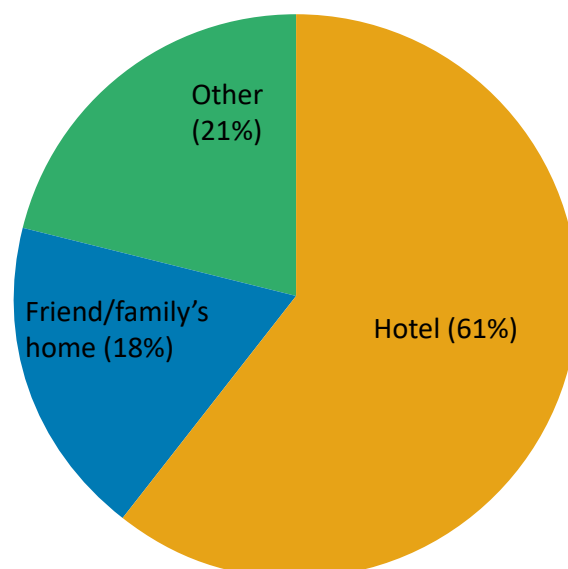


Figure 4.6.2 Accommodation for staying visitors Q3 2023

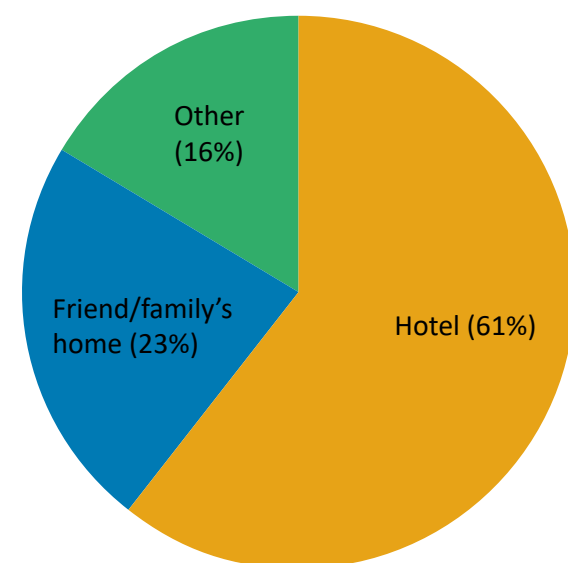


Table 4.6.1 Accommodation for staying visitors

	Q3 2019	Q3 2023	4 yr % change
Hotel	60,909	44,927	-26%
Friend/family's home	18,591	16,979	-9%
Other (including guest houses, accommodation listed on Airbnb or other online booking portals, self-catering units and campsites etc)	21,006	12,039	-43%
Total staying visitors	100,506	73,944	-26%

5.1 Visitor accommodation - capacity

Figure 5.1.1 Visitor accommodation capacity

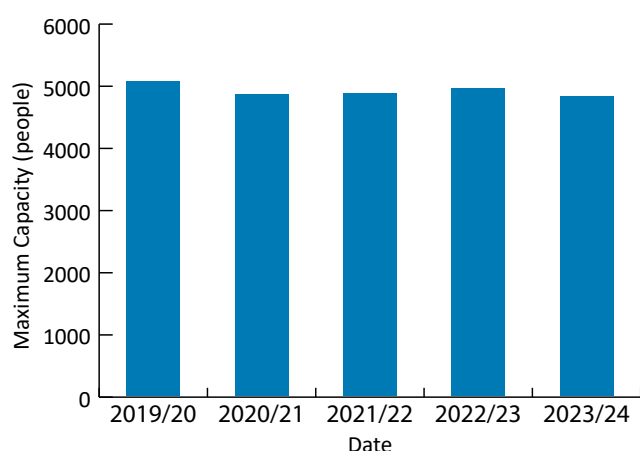


Table 5.1.1 Visitor accommodation capacity

	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.

5.1 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 July, August and September 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 and third 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). However, there were no such changes to the total number of units with active permits during Q3 2023.

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 5.1.3 and **Figure 5.1.3** show that there were 1,902 visitor accommodation units during Q3 2023, of these, 100%, 1,902 were available to book in July, August and September 2023.

Table 5.1.3 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

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.

Figure 5.1.3 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.

5.2 Visitor accommodation - occupancy

Figure 5.2.1 Occupancy of open/available accommodation units

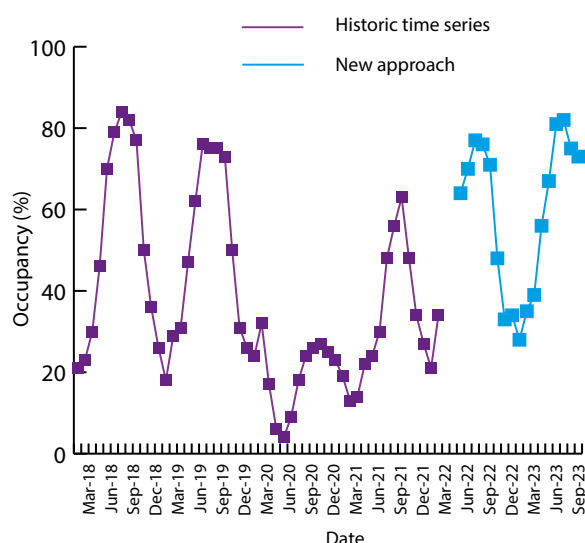


Table 5.2.1 Occupancy of open/available accommodation units

	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%	
November	31%	25%	34%	33%	
December	26%	23%	27%	34%	

*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 5.2.1**, 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 in 2023 peaked at 82% in July 2023, decreasing to 75% in August 2023 and 73% in September 2023. Additional information began being collected in June 2023, which makes it possible to determine that 2% of open units in July 2023 were occupied by long-stay guests. In August 2023 9% of open units were occupied by long-stay guests and in September 12% of open units were occupied by long-stay guests.

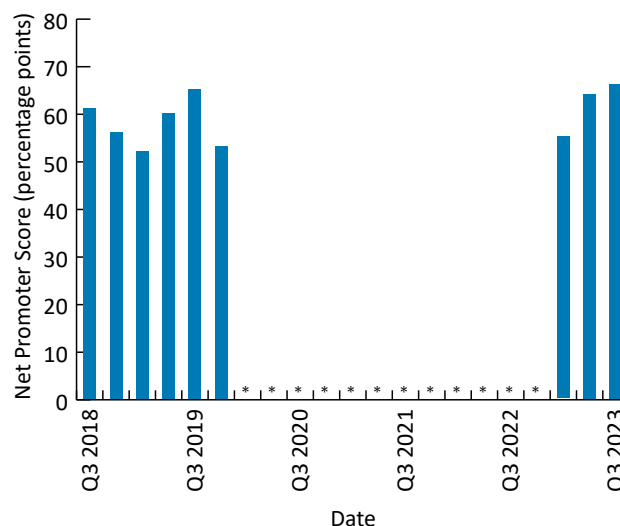
6.1 Net promoter score

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.

As shown in **Figure 6.1.1** 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 these surveys were suspended and the breakdown of passengers could not be determined or net promoter scores ascertained.

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 **Table 6.1.1** and **Figure 6.1.1** the net promoter score for Q3 2023 was 66 percentage points. By main purpose of visit, those seeing friends/family had the highest net promoter score (78 percentage points) in Q3 2023, followed by those visiting for leisure purposes (69 percentage points). Those visiting on business/work had the lowest net promoter score, just 31 percentage points. By country of residence, net promoter scores were highest for visitors from the UK in Q3 2023 (70 percentage points) followed by the Rest of the World (61 percentage points) and France (48 percentage points). Those visiting from Jersey had the lowest net promoter score (47 percentage points). Please note there can be differences in how the net promoter score question is interpreted by country of residence.

Figure 6.1.1 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 6.1.1 Net promoter score

	Q3 2019	Q3 2023
Net Promoter Score (percentage points)	65	66

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 Q3 2023, 5,579 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 11,136 passengers, which is 6.9% of the total number of passengers departing Guernsey during Q3 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. This quarter there were 5,579 interviews conducted and it was found that 68% 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 67% to 69%. 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 July, August and September 2023 include various different accommodation types and sizes and statistics for these months are accurate to within 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.

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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