

# Guernsey Quarterly Travel and Visitor Accommodation Transitional Bulletin

Quarter 1 2023

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The Guernsey Quarterly Travel and Visitor Accommodation Transitional 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

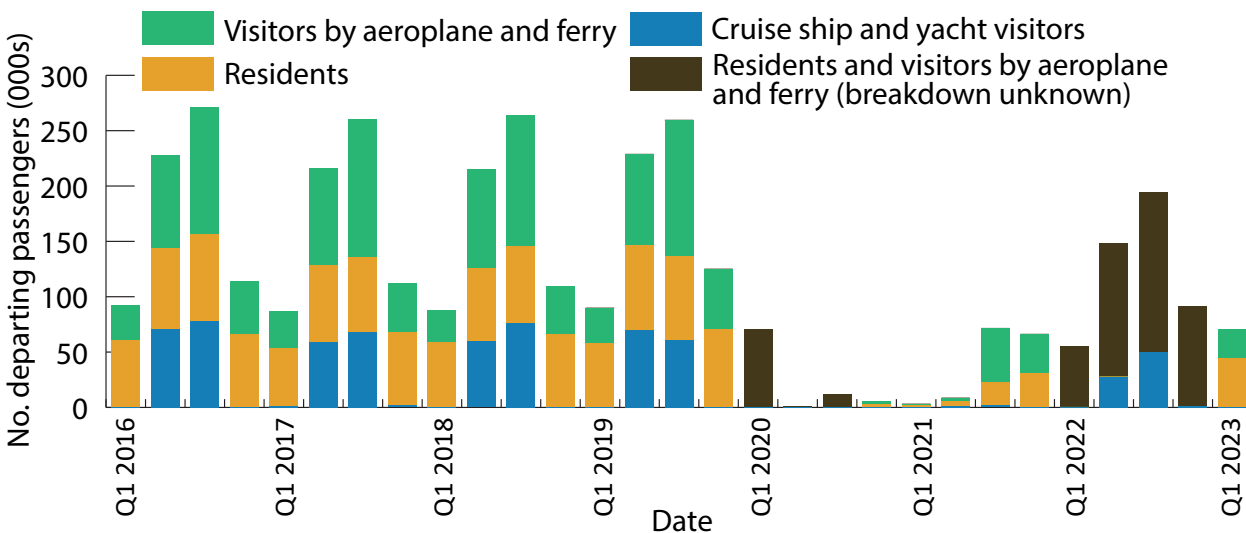
The Guernsey Quarterly Travel and Visitor Accommodation Transitional Bulletin provides information on visitors to the Island of Guernsey and the accommodation they stayed in, as well as Guernsey residents travelling to destinations outside the Bailiwick. It uses data gathered via surveys of people leaving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

It provides a refresh of the information that was last published in quarter four 2019, along with new and additional information. Some data was not collected during the COVID-19 pandemic, but is now being collected again (although, in some cases, with a different methodology). As such, this Bulletin is labelled as transitional and will be further developed over time. Feedback is welcome on the contents of this Bulletin. Previous Guernsey Travel Survey reports are available via <https://guernseytrademedia.com/strategy/facts-figures/>.

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 with 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 transitting through Guernsey on their way to or from a destination outside the Bailiwick).

## 1.2 Headlines

**Figure 1.2.1 Passenger volumes - departing passengers**



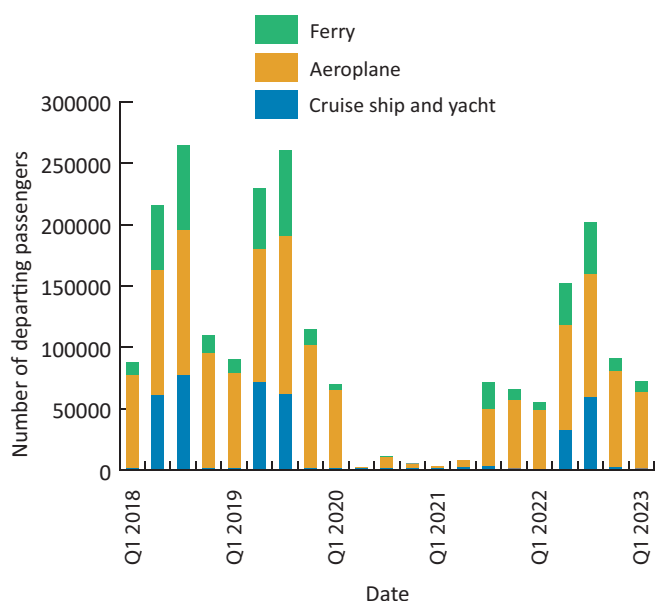
COVID-19 related requirements were put in place for people travelling into Guernsey in February 2020 and remained in place throughout 2021 with no non-essential travel allowed between 12th March 2020 and 20th May 2020 or between 14th January 2021 and 22nd March 2021. The requirements varied depending 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 72,510 during the first quarter of 2023. This compares with 90,216 during quarter one 2019; a decrease of 20%.
- During the first quarter of 2023, 86% of passengers departed by aeroplane, 13% by ferry and less than 1% by yacht (no cruise ships visited Guernsey in the first quarter of 2023). In the first quarter of 2019 the breakdown was also: 86% of passengers departing by aeroplane, 13% by ferry, and less than 1% by yacht. It should be noted that the weather can impact on travel volumes and have different impacts on the different modes of transport.
- 81% of departing passengers were going to an air or sea port in the UK, 14% Jersey, 4% rest of world and less than 1% were on a yacht trip.
- The total number of departing visitors (including any cruise and yacht passengers), for Q1 2023 was 26,162; 19% lower than Q1 2019. The total number of departing residents was 44,360; 23% lower than Q1 2019.
- Of the residents: the main purpose of their trip away was leisure for 46% (20,508 people). On average, residents staying away at least one night spent 7 nights away from Guernsey per trip in Q1 2023.
- Of the visitors: 36% were mainly visiting to see friends or relatives, 34% were mainly visiting for business purposes, 19% were mainly visiting for leisure, 8% were visiting for another main purpose, 2% were long stay visitors (staying more than 30 nights but less than 1 year) and less than 1% were on a yacht trip.
- 75% of visitors during Q1 2023 were from the UK, 2% from France, 12% from Jersey and 10% from elsewhere (including Alderney, Sark and Herm). The country of residence was unknown for less than 1%, who were visiting on a yacht.
- 14% of all visitors had visited Guernsey on a day trip and less than 1% on a yacht trip during Q1 2023, whereas 83% had stayed ashore in Guernsey for one to 30 nights and 2% 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 Q1 2023, was 4 nights. 66% of the visitors that stayed overnight stayed in visitor accommodation, whereas 34% stayed with friends or relatives.
- 73% of all visitors leaving by aeroplane or ferry had visited Guernsey before (and of those, 3% had visited before on a cruise).
- There were 1,782 units of visitor accommodation available for booking in January, 1,812 in February and 2,068 in March 2023. The occupancy of available units was 28% in January, 35% in February and 39% in March 2023. It should be noted that visitor accommodation could be occupied by visitors or residents during 2023. See [page 16](#) 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 55 percentage points. Higher scores (of 72 and 70 percentage points respectively) were given by visitors seeing friends/family and those visiting for leisure than by those visiting for business/work/conference/training (35 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 Q1 2023, as shown in **Table 2.1.1**, was 72,510, 31% higher than Q1 2022, but 20% lower than pre COVID-19 passenger volumes in Q1 2019.

86% of all departing passengers travelled by aeroplane in Q1 2023, 62,710 people, 32% higher than Q1 2022 but 19% lower than Q1 2019. 13% of all passengers travelled by ferry in Q1 2023, 9,663 people, 25% higher than Q1 2022 but 21% lower than Q1 2019.

**Table 2.1.1 Passenger volumes**

	Q1 2019	Q1 2020	Q1 2021	Q1 2022	Q1 2023
Passengers departing Guernsey by aeroplane	77,722	64,236	2,298	47,441	62,710
Passengers departing Guernsey by ferry	12,157	6,001	708	7,761	9,663
Passengers departing Guernsey by cruise ship and yacht	337	71*	6*	0*	137*
<b>Total departing passengers</b>	<b>90,216</b>	<b>70,308</b>	<b>3,012</b>	<b>55,202</b>	<b>72,510</b>

\*Between Q4 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.

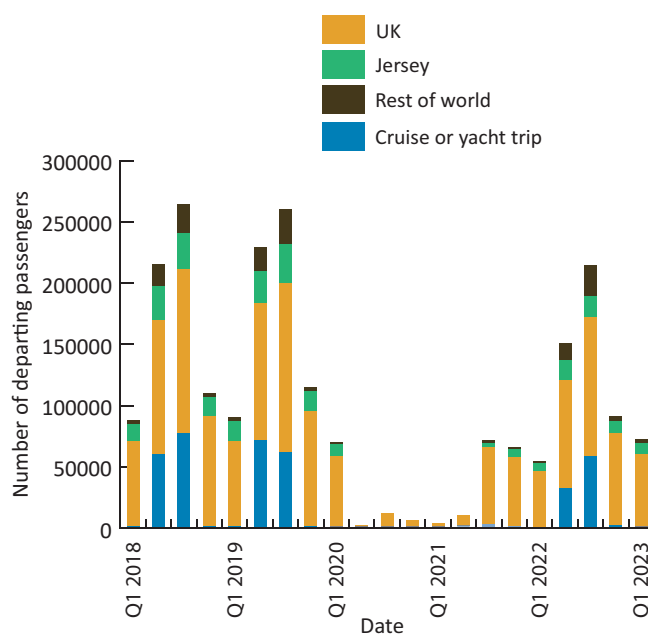
## 2.2 Passenger volumes by destination

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.

81% of all passengers departed Guernsey for the UK, totalling 59,012 people in Q1 2023, 29% higher than Q1 2022 but 15% lower than Q1 2019. 14% of all passengers departing Guernsey were travelling to Jersey and totalled 10,488 in Q1 2023, 45% higher than Q1 2022 but 39% lower than Q1 2019. 4% of passengers departed Guernsey for the rest of the world and totalled 2,873 in Q1 2023, 27% higher than Q1 2022 and 4% higher than Q1 2019. Less than 1% of passengers departed Guernsey on a cruise or yacht trip in Q1 2023, 137 people.

**Figure 2.2.1 Passenger volumes by destination**



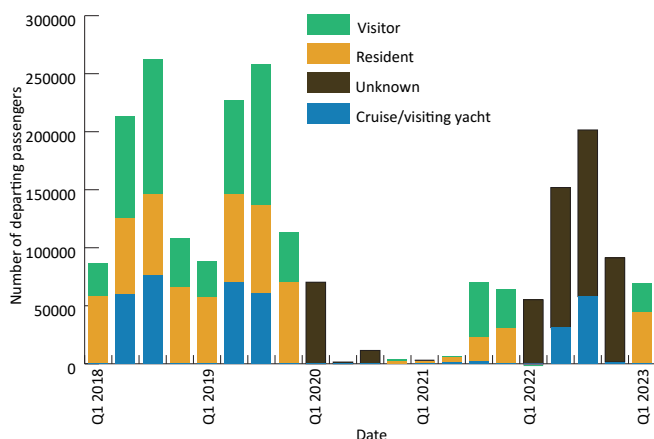
**Table 2.2.1 Passenger volumes by destination**

	Q1 2019	Q1 2020	Q1 2021	Q1 2022	Q1 2023
<b>Passengers departing Guernsey for United Kingdom</b>	69,771	57,461	2,797	45,683	59,012
<b>Passengers departing Guernsey for Jersey</b>	17,334	10,871	128	7,248	10,488
<b>Passengers departing Guernsey for rest of world</b>	2,774	1,905	81	2,271	2,873
<b>Passengers departing Guernsey on cruise or yacht trip</b>	337	71*	6*	0*	137*
<b>Total departing passengers</b>	90,216	70,308	3,012	55,202	72,510

\*Between Q4 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.

## 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. 12% of departing passengers were surveyed in Q1 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**

	Q1 2019	Q1 2020	Q1 2021	Q1 2022	Q1 2023
Residents departing Guernsey by aeroplane	50,463	-	1,425	-	38,736
Residents departing Guernsey by ferry	6,947	-	439	-	5,623
Visitors departing Guernsey by aeroplane	26,826	-	873	-	22,126
Visitors departing Guernsey by ferry	5,180	-	269	-	3,899
Visitors departing Guernsey by cruise ship and yacht	337	71*	6*	0*	137*
<b>Total departing residents</b>	<b>57,409</b>	<b>-</b>	<b>1,864</b>	<b>-</b>	<b>44,360</b>
<b>Total departing visitors</b>	<b>32,344</b>	<b>-</b>	<b>1,142</b>	<b>-</b>	<b>26,162</b>
<b>Total visitors returning to Guernsey later</b>	<b>463</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>1,988</b>

\*Between Q4 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.

## 2.3 Passenger volumes - visitors and residents

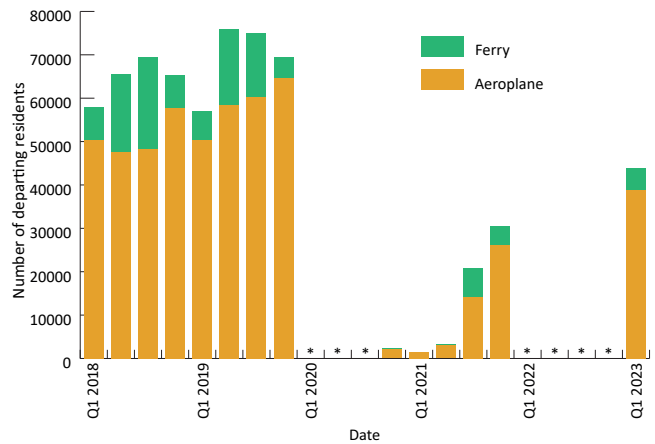
As shown in **Table 2.3.1** and **Figure 2.3.1** 44,360 passengers, 61% of those departing Guernsey in Q1 2023 were residents, whilst 36% of those departing Guernsey were visitors (26,162 passengers). A small proportion, 3%, 1,988 visitors reported that they were returning to Guernsey later. In order 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.

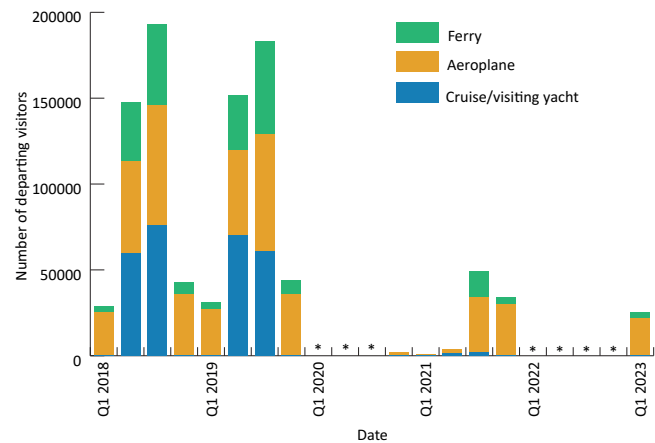
**Figure 2.3.2** shows the volume of residents travelling by ferry and aeroplane each quarter. In Q1 2023, 87%, 38,736 residents travelled by aeroplane, the remainder, 13%, 5,623 residents travelled by ferry. The number of residents travelling by aeroplane in Q1 2023 was 23% lower than the number travelling by aeroplane in Q1 2019. The number of residents travelling by ferry in Q1 2023 was 19% lower than the number travelling by ferry in Q1 2019.

**Figure 2.3.3** shows the volume of visitors travelling by ferry, aeroplane, cruise ship/visiting yacht each quarter. In Q1 2023, 85%, 22,126 visitors travelled by aeroplane, 15%, 3,899 visitors travelled by ferry and less than 1%, 137 people travelled by visiting yacht. The number of visitors travelling by aeroplane in Q1 2023 was 18% lower than the number travelling by aeroplane in Q1 2019. The number of visitors travelling by ferry in Q1 2023 was 25% lower than the number travelling by ferry in Q1 2019.

**Figure 2.3.2 Resident passenger volumes**



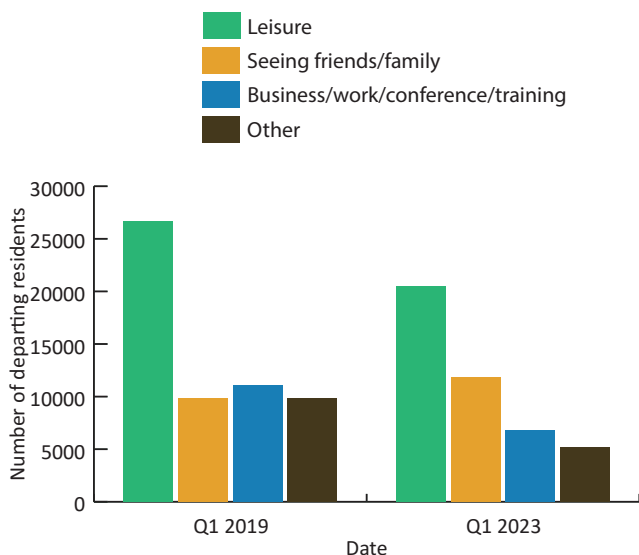
**Figure 2.3.3 Visitor passenger volumes**



\*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**

	Q1 2019	Q1 2023
Leisure (e.g. holiday/vacation/break)	26,640	20,508
Seeing friends/family (including weddings, funerals etc)	9,858	11,824
Business/work/conference/training	11,088	6,819
Other	9,824	5,210
<b>Total</b>	<b>57,409</b>	<b>44,360</b>

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 Q1 2023, 46%, 20,508 residents reported the main purpose of their trip away from Guernsey was for leisure, 23% lower than the 26,640 residents who reported they were travelling for leisure in Q1 2019. Just over a quarter of all residents, 11,824 people cited they were seeing friends/family, 20% higher than the 9,858 who reported they were travelling to see friends/family in Q1 2019. 15%, 6,819 residents were leaving on business (38% lower than the 11,088 in Q1 2019) and 12%, 5,210 were leaving for other reasons (9,824 in Q1 2019).



## 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.

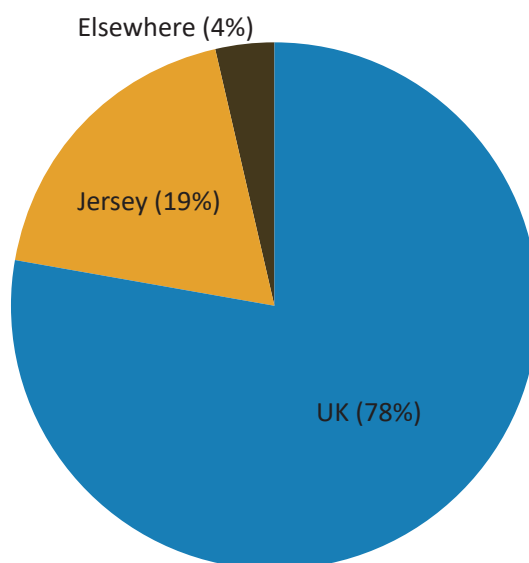
The majority, 82% of residents, 36,276 people were travelling to the UK in Q1 2023, (in Q1 2019 the equivalent figure was 78% of residents and 44,663 people).

13% of residents travelled to Jersey, 5,940 people, for Q1 2019 this was 19% of residents and 10,701 people. The number of residents travelling to Jersey during Q1 2023 was 44% lower than for Q1 2019. Only 5% of residents, 2,144 people travelled elsewhere during Q1 2023 (4%, 2,045 residents travelled elsewhere in Q1 2019).

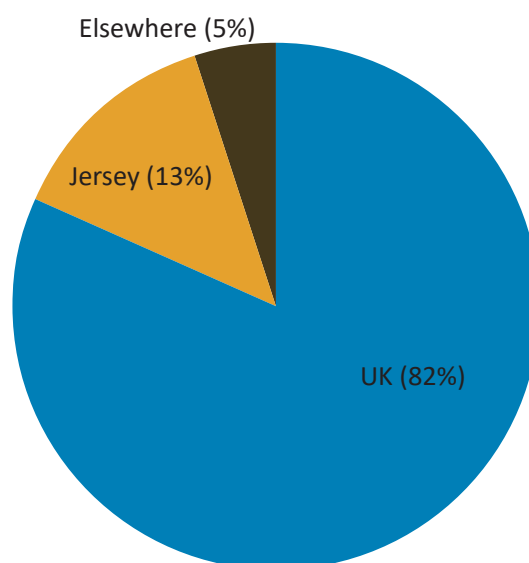
76% of all those surveyed during Q1 2023 stated that their final destination was nearby to the airport/port travelled to. Residents travelling to London Gatwick were most likely to state that their final destination was not nearby; 58% said their final destination was nearby.

Day trips accounted for 7% of all residents trips during Q1 2023. The average length of trip by residents during Q1 2023 was 7 nights.

**Figure 3.2.1 Residents - destination port Q1 2019**



**Figure 3.2.2 Residents - destination port Q1 2023**

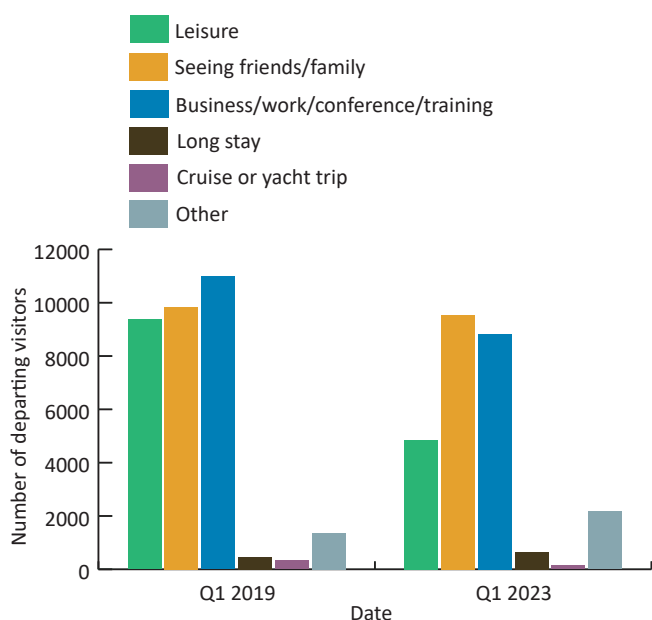


**Table 3.2.1 Residents - destination port**

	Q1 2019	Q1 2023
United Kingdom	44,663	36,276
Jersey	10,701	5,940
Rest of world	2,045	2,144
<b>Total</b>	<b>57,409</b>	<b>44,360</b>

## 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**

	Q1 2019	Q1 2023
Leisure (e.g. holiday/vacation/break)	9,372	4,853
Seeing friends/family (including weddings, funerals etc)	9,829	9,530
Business/work/conference/training	10,981	8,832
Long stay (more than 30 nights but less than 1 year for work/other purpose)	452	644
Cruise or yacht trip	337	137*
Other	1,373	2,165
<b>Total</b>	<b>32,344</b>	<b>26,162</b>

\*Between Q4 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.

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 Q1 2023, 4,853 visitors reported the main purpose of their trip to Guernsey was for leisure (9,372 in Q1 2019). 9,530 visitors cited they were seeing friends/family (9,829 in Q1 2019), 8,832 were here for business (10,981 in Q1 2019) and 2,165 were here for other reasons (1,373 in Q1 2019). 137 visitors to Guernsey during Q1 2023 visited by yacht, there were no cruise ships during Q1 2023. 644 visitors during Q1 2023 were long stay visitors, having stayed more than 30 nights but less than 1 year (452 visitors in Q1 2019). The majority of long stay visitors were in Guernsey for work reasons.

73% of all visitors to Guernsey 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

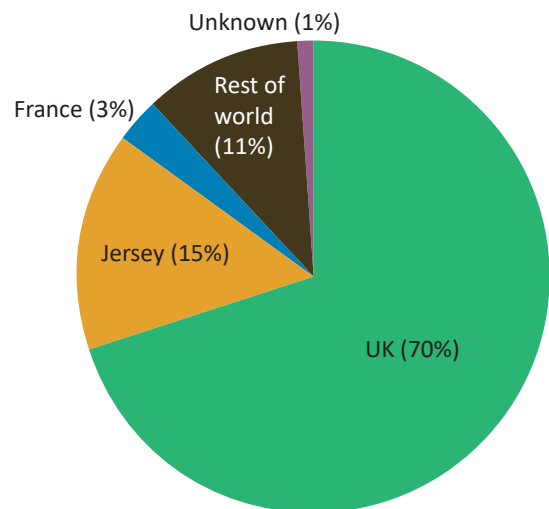
Another of the questions asked of visitors during passenger exit surveys is their country of residence. Survey results are applied to overall passenger volumes to give figures for the whole quarter.

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.

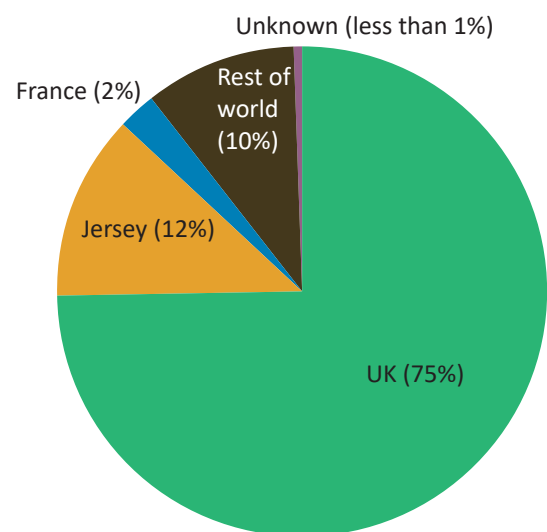
Prior to March 2020 surveys were conducted at the airport and harbour to determine the composition of passengers. When restrictions were put in place to reduce the impact of COVID-19 these surveys were suspended and the breakdown of passengers could not be determined. When the Travel Tracker system was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

During Q1 2023, three quarters of all visitors, 19,593 people reported their country of residence was the UK (70%, 22,645 in Q1 2019). 2%, 651 visitors were from France (3%, 914 in Q1 2019). 12%, 3,192 visitors were from Jersey (15%, 4,933 in Q1 2019), 10%, 2,589 visitors were from the Rest of the world (11%, 3,515 in Q1 2019), and less than 1%, 137 visitor's country of residence was unknown, as they were visiting by yacht (1%, 337 in Q1 2019).

**Figure 4.2.1 Visitors - country of residence Q1 2019**



**Figure 4.2.2 Visitors - country of residence Q1 2023**



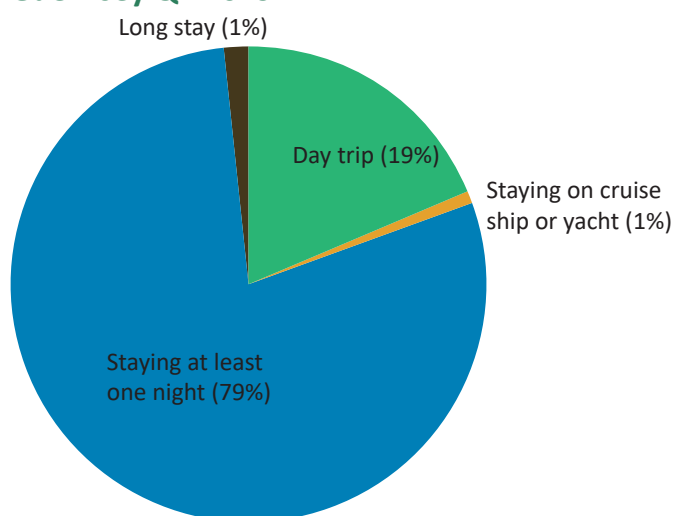
**Table 4.2.1 Visitors - country of residence**

	Q1 2019	Q1 2023
<b>United Kingdom</b>	22,645	19,593
<b>Jersey</b>	4,933	3,192
<b>France</b>	914	651
<b>Rest of world</b>	3,515	2,589
<b>Unknown (cruise ship and yacht passengers)</b>	337	137*
<b>Total</b>	32,344	26,162

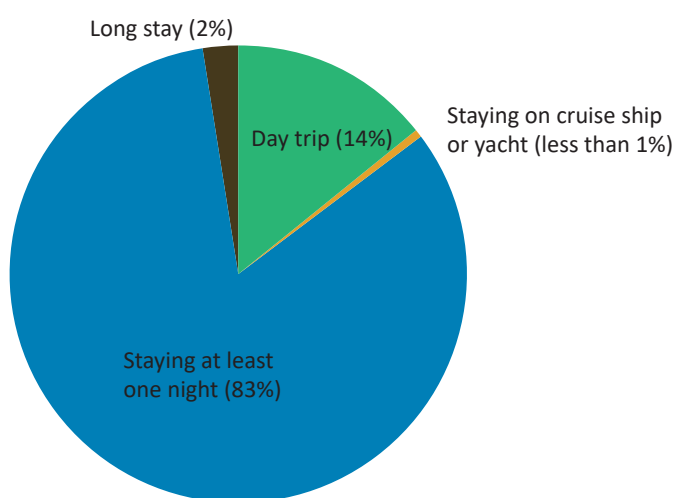
\*Between Q4 2019 and Q1 2023 the number of people visiting by yacht was unknown, but the number has been inferred from the number of visiting yachts and the average number of people each vessel typically has on board.

## 4.3 Visitors - length of stay in Guernsey

**Figure 4.3.1 Visitors - length of stay in Guernsey Q1 2019**



**Figure 4.3.2 Visitors - length of stay in Guernsey Q1 2023**



**Table 4.3.1 Visitors - length of stay in Guernsey**

	Q1 2019	Q1 2023
Day trip to Guernsey	6,033	3,719
Staying on a cruise ship or yacht	337	137*
Staying at least one night in Guernsey (but 30 or less nights)	25,522	21,661
Long stay (more than 30 nights but less than 1 year)	452	644
<b>Total</b>	<b>32,344</b>	<b>26,162</b>

\*Between Q4 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.

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 Q1 2023, 3,719 people visited Guernsey on a day trip, representing 14% of all visitors (6,033 people, 19% in Q1 2019). The majority, 83% of visitors, 21,661 people, stayed at least one night but less than 31 nights (25,522 people, 79% in Q1 2019). During Q1 2023 2% of visitors were long stay visitors (644 people).

Comparison between Q1 2023 and Q1 2019 reveals that in Q1 2023 there were 38% fewer visitors on a day trip, 15% fewer visitors staying at least one night (but less than 31 nights) and 43% more Long stay visitors, compared with Q1 2019.

The average length of stay for visitors staying at least one night but less than 31 nights was 4.0 nights in Q1 2023, equating to 86,022 bed nights, and compares with 4.3 nights, and 110,805 bed nights in Q1 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.

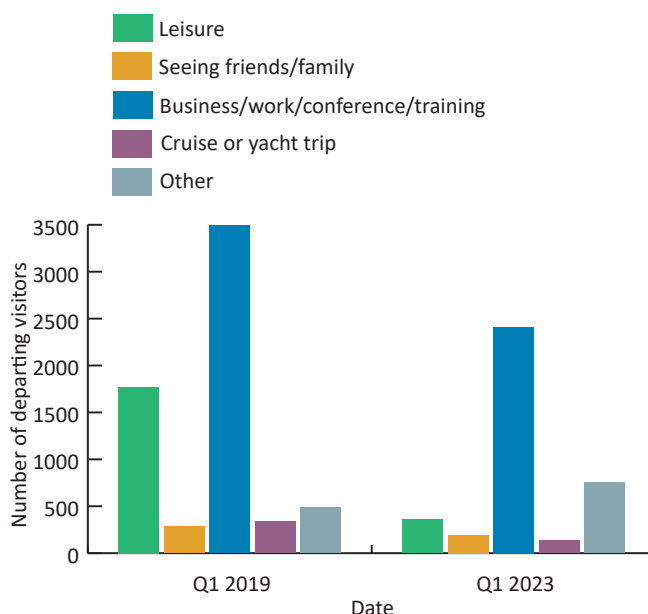
At present, those departing on cruise ships or yachts are not asked to complete the same survey. The overall number of these visitors (who, for the most part, likely stay overnight on their boat and visit Guernsey for day trips) is included in this section for completeness.

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 Q1 2023, 9% of all visitors on a day trip to Guernsey, 361 people, reported the main purpose of their trip to Guernsey was for leisure (80% lower than the 1,773 people who reported their day trip was for leisure purposes in Q1 2019). 192 visitors who visited Guernsey on a day trip, 5% of day trippers, cited they were seeing friends/family (283 in Q1 2019), 2,412 were here for business, 63% of all day trip visitors, (3,490 in Q1 2019) and 754 day trip visitors (20%) were here for other reasons (487 in Q1 2019).

Comparison between Q1 2023 and Q1 2019 reveals that in Q1 2023 there were 80% fewer day trippers visiting for leisure purposes, 32% fewer day visitors seeing friends/family, 31% fewer day visitors travelling for business/work and 55% more day visitors travelling for other reasons, compared with Q1 2019.

**Figure 4.4.1 Main purpose of trip of day trip visitors**



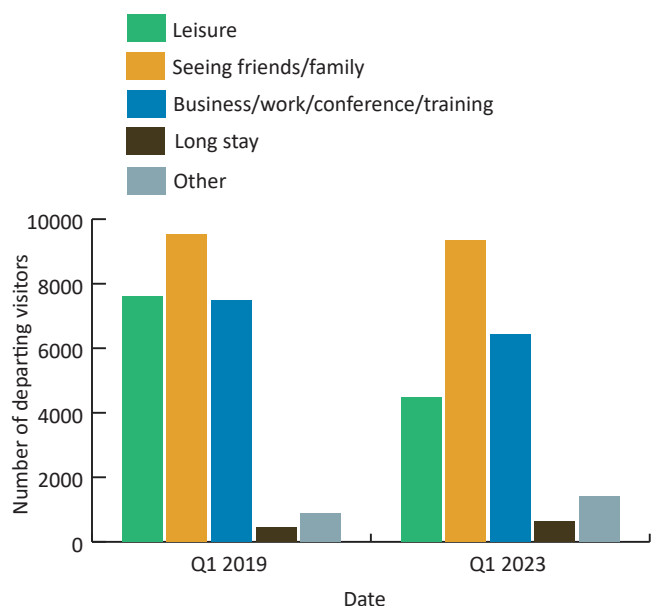
**Table 4.4.1 Main purpose of trip of day trip visitors**

	Q1 2019	Q1 2023
<b>Leisure (e.g. holiday/vacation/break)</b>	1,773	361
<b>Seeing friends/family (including weddings, funerals etc)</b>	283	192
<b>Business/work/conference/training</b>	3,490	2,412
<b>Cruise or yacht trip</b>	337	137*
<b>Other</b>	487	754
<b>Total</b>	<b>6,370</b>	<b>3,856</b>

\*Between Q4 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.

## 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**

	Q1 2019	Q1 2023
Leisure (e.g. holiday/vacation/break)	7,599	4,492
Seeing friends/family (including weddings, funerals etc)	9,546	9,338
Business/work/conference/training	7,492	6,420
Long stay (more than 30 nights but less than 1 year)	452	644
Other	885	1,411
<b>Total</b>	<b>25,974</b>	<b>22,306</b>

Visitors 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.

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 Q1 2023, 20% or 4,492 of all staying visitors reported the main purpose of their trip to Guernsey was for leisure (7,599 in Q1 2019). 42% or 9,338 staying visitors cited they were seeing friends/family (a similar level to the 9,546 who reported they were seeing friends/family in Q1 2019), 29%, 6,420 were here for business or work reasons (7,492 in Q1 2019) and 6%, 1,411 were here for other reasons (885 in Q1 2019). 3% or 644 visitors were long stay visitors, having stayed more than 30 nights but less than 1 year, in Q1 2023 (452 visitors in Q1 2019).

## 4.6 Visitors - accommodation of staying visitors

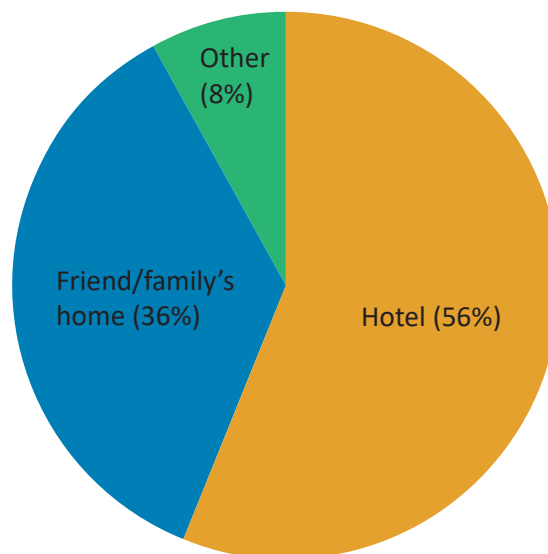
Visitors who stayed in Guernsey overnight are asked an extra question about the type of accommodation they stayed in as part of the exit survey. Survey results are applied to overall passenger volumes to give figures for the whole quarter. Those visitors staying in Guernsey more than 30 nights (long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

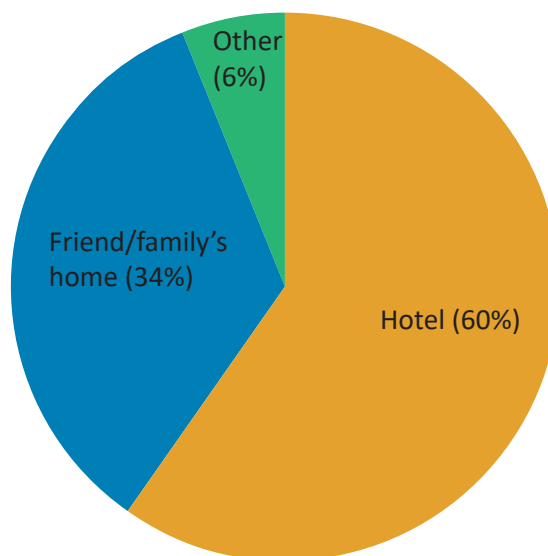
As shown in **Figure 4.6.1**, **Figure 4.6.2** and **Table 4.6.1**, in Q1 2023, 60% of all visitors staying in Guernsey stayed in hotels, (12,951 people), 34% stayed with friends/family (7,418 people) and 6% stayed in other accommodation (1,292 people). The other category includes guest houses, Airbnbs, self-catering units and campsites etc. Comparison between Q1 2023 and Q1 2019 reveals that in Q1 2023 there were 11% fewer visitors staying in hotels, 21% fewer visitors staying in friend/family's homes and 36% fewer visitors staying in Other accommodation, compared with Q1 2019.

On average visitors in hotels stayed 3.2 nights in Q1 2023 and equates to 41,036 bed nights (2.9 nights in Q1 2019). During Q1 2023 the average length of stay with friends/family was 4.9 nights, equating to 36,605 bed nights (6.3 nights in Q1 2019) and the average length of stay in Other (which includes guest houses, Airbnbs, self-catering units and campsites etc) was 5.0 nights equating to 6,494 bed nights.

**Figure 4.6.1 Accommodation for staying visitors Q1 2019**



**Figure 4.6.2 Accommodation for staying visitors Q1 2023**

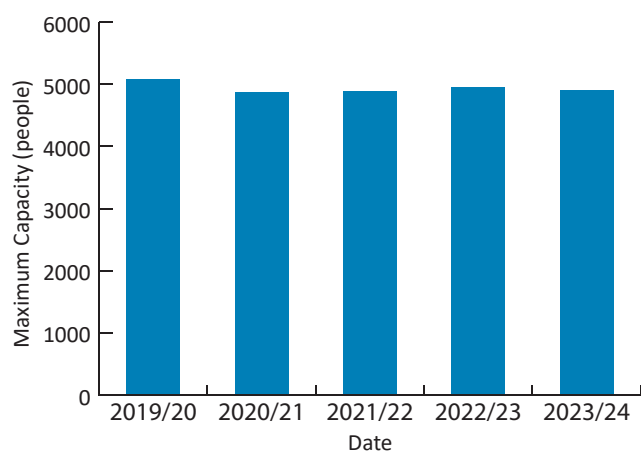


**Table 4.6.1 Accommodation for staying visitors**

	Q1 2019	Q1 2023
Hotel	14,596	12,951
Friend/family's home	9,343	7,418
Other (including guest houses, Airbnbs, self-catering units and campsites etc)	2,035	1,292
<b>Total staying visitors</b>	<b>25,974</b>	<b>21,661</b>

## 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
<b>Maximum capacity (people)</b>	5,055	4,854	4,863	4,938	4,880
<b>Temporarily unavailable capacity e.g. closed for refurbishment</b>	0	0	0	120	201
<b>Total (including temporarily unavailable)</b>	5,055	4,854	4,863	5,058	5,081

**Table 5.1.2 Additional summer capacity**

	2023
<b>Maximum additional capacity (people)</b>	320
<b>Additional number of units (equipped tents, log cabins, yurts, shepherd's huts etc)</b>	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 Airbnbs that have boarding permits. 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 any Airbnbs that do not have active boarding permits.

The maximum capacity of accommodation providers with an active boarding permit (or a renewal process underway) for the 2023 summer season and winter 2023/24 was 4,880, as shown in **Table 5.1.1**; a 1% decline from 2022/23.

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 been 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 January, February and March 2023 include different accommodation types and sizes and statistics for these months are accurate to 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.

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 the first three months of 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 5.1.1** and **Figure 5.1.1** show that there were 2,074 visitor accommodation units in March 2023, of these, 86%, 1,782 were available to book in January 2023, 87%, 1,812 were available to book in February 2023 and almost all, 99.7%, 2,068 units were available to book in March 2023.

**Table 5.1.3 Availability of visitor accommodation**

	January 2023	February 2023	March 2023
<b>Number of units available to be booked</b>	1,782	1,812	2,068
<b>Number of units not available to be booked</b>	292	262	6
<b>Total number of units</b>	2,074	2,074	2,074

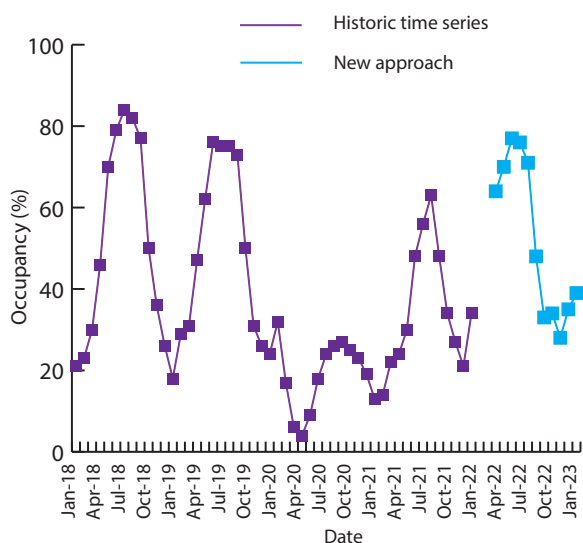
**Figure 5.1.3 Availability of visitor accommodation**



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 and Airbnb unit. 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
<b>January</b>	18%	24%	19%	21%	28%
<b>February</b>	29%	32%	13%	34%	35%
<b>March</b>	31%	17%	14%	*	39%
<b>April</b>	47%	6%	22%	*	
<b>May</b>	62%	4%	24%	64%	
<b>June</b>	76%	9%	30%	70%	
<b>July</b>	75%	18%	48%	77%	
<b>August</b>	75%	24%	56%	76%	
<b>September</b>	73%	26%	63%	71%	
<b>October</b>	50%	27%	48%	48%	
<b>November</b>	31%	25%	34%	33%	
<b>December</b>	26%	23%	27%	34%	

Some of the 2022 figures in this table were updated on 2nd June, after it was identified that the incorrect data had been transposed into the table. The chart above remains unchanged from the original issue.

\*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. Please note that the statistics from May 2022 onwards have been restated since the last publication of these statistics, so that they are comparable with the new approach that is being taken from April 2023 onwards and more comparable with historic figures.

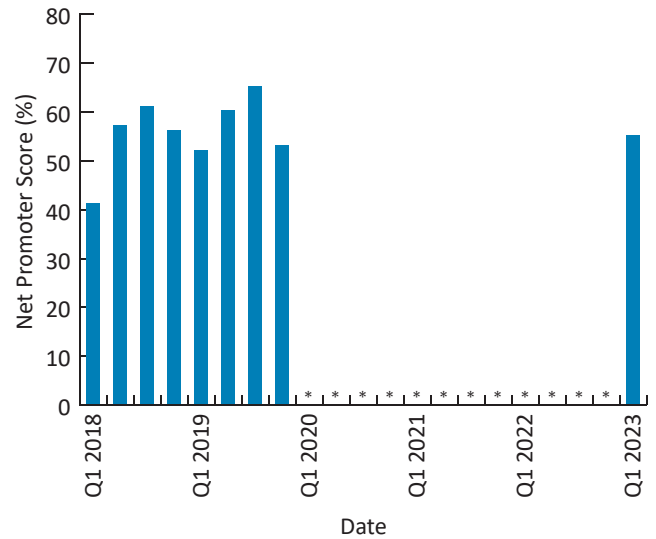
## 6.1 Net promoter score

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 (7%) from the percentage of visitors surveyed that gave a score of ten or nine out of ten (62%). As shown in **Table 6.1.1** and **Figure 6.1.1** the net promoter score for Q1 2023 was 55 percentage points. By main purpose of visit, those seeing friends/family had the highest net promoter score (72 percentage points) in Q1 2023, followed by those visiting for leisure purposes (70 percentage points). Those visiting on business/work had the lowest net promoter score, just 35 percentage points. By country of residence, net promoter scores were highest for visitors from the UK in Q1 2023 (61 percentage points) followed by the Rest of the World (48 percentage points). Those visiting from Jersey had the lowest net promoter score (38 percentage points).

**Figure 6.1.1 Net promoter score**



\*Between Q1 2020 and Q1 2023 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**

	Q1 2019	Q1 2023
<b>Net Promoter Score</b>	52%	55%

## 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 Q1 2023, 5,399 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 8,849 passengers, which is 12.2% of the total number of passengers departing Guernsey during Q1 2023 (excluding those travelling within the islands of the Bailiwick).

All sample surveys are subject to a degree of statistical error. This quarter there were 5,399 interviews conducted and it was found that 36% 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 35% to 37%. 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 January, February and March 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](http://www.gov.gg/data). Please contact us for further information.

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