

# Guernsey Quarterly Travel and Visitor Accommodation Bulletin

Quarter 2 2024

Issue date 13th August 2024

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.

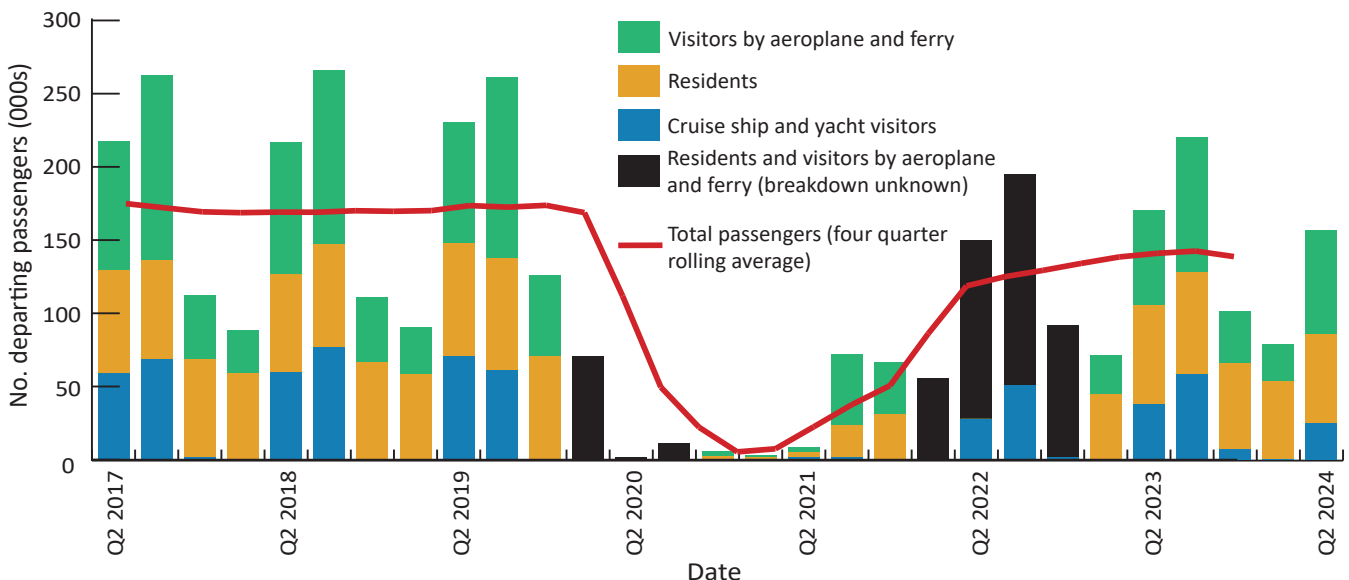
This is the sixth Guernsey Quarterly Travel and Visitor Accommodation Bulletin. Some data was not collected during the COVID-19 pandemic, but is now being collected again (although, in some cases, with a different methodology). Feedback was invited, following publication of the Q1 2023 Bulletin, and 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](https://www.gov.gg/travel_and_visitor).

Statistics are presented in a comparable manner over time and with other jurisdictions wherever possible. It should be noted that the passenger volume figures throughout this report exclude travel between the Islands within the Bailiwick of Guernsey. Also, Herm, Sark and Alderney residents are only included in the analysis if they were in Guernsey “in transit” i.e. travelling via Guernsey to or from somewhere outside of the Bailiwick. For reporting purposes within this bulletin, they are classified as Visitors and the purpose of their visit is classified as “Other” (along with residents of places outside the Bailiwick of Guernsey that were transiting through Guernsey on their way to or from a destination outside the Bailiwick).

## 1.2 Headlines

**Figure 1.2.1 Passenger volumes - departing passengers**



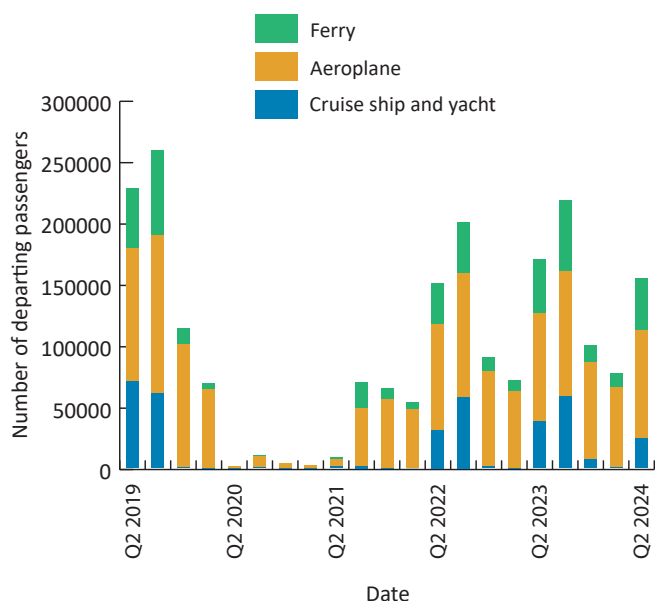
COVID-19 related requirements were put in place for people travelling into Guernsey in February 2020 and remained in place throughout 2021 with no non-essential travel allowed between 12th March 2020 and 20th May 2020 or between 14th January 2021 and 22nd March 2021. The requirements varied depending on the country of origin and vaccination status of the traveller. All COVID-19 related travel restrictions were lifted on 17th February 2022. As such, comparisons in this report are mainly drawn between 2019, 2023 and 2024. Travel to and from the Island is highly seasonal, as can be seen in **Figure 1.2.1**, so the same quarter of each year is used for comparison throughout this bulletin.

## 1.2 Headlines (continued)

- The total number of (resident and visiting) passengers (including cruise and yacht passengers) departing Guernsey was 155,903 during quarter two 2024. This compares with 170,954 during quarter two 2023; a decrease of 9%. It is 32% lower than in quarter two 2019.
- During the second quarter of 2024, 56% of passengers departed by aeroplane, 28% by ferry and 16% by cruise ships or yachts. The number of passengers travelling by aeroplane in Q2 2024 was 1% lower than Q2 2023 and 19% lower than Q2 2019. The number of passengers travelling by ferry was 2% lower than Q2 2023 and 13% lower than Q2 2019. The number of cruise and yacht passengers during Q2 2024 was 35% lower than Q2 2023 and 65% lower than Q2 2019.
- 59% of departing passengers were going to an air or sea port in the UK, 13% Jersey, 12% rest of the world and 16% were on a cruise ship or yacht trip during Q2 2024.
- The total number of departing visitors (including any cruise and yacht passengers) for Q2 2024 was 94,467; 7% lower than Q2 2023 and 38% lower than Q2 2019. The number of departing visitors excluding any cruise and yacht passengers for Q2 2024 was 70,053; 9% higher than Q2 2023 and 15% lower than Q2 2019.
- The total number of departing residents in Q2 2024 was 60,832; 9% lower than Q2 2023 and 20% lower than Q2 2019.
- Of the residents, the main purpose of their trip away was leisure for 59% (35,626 people). Residents travelling to see friends/family totalled 11,770 people in Q2 2024. Residents travelling for business purposes totalled 5,881 people.
- Of the visitors: 43% were mainly visiting for leisure, 17% were mainly seeing friends/family, 8% were visiting for business purposes, 6% were visiting for another main purpose and 26% were cruise and yacht passengers. Those visiting for another main purpose were asked the reason for their visit and 1% of all visitors in Q2 2024 mentioned sport, be it as a participant or spectator. Less than 1% were long stay visitors (staying more than 30 nights but less than 1 year).
- During Q2 2024, 40,821 visitors travelled to Guernsey for leisure; 11% higher than Q2 2023 ,but 25% lower than Q2 2019. Visitors travelling to see friends/family totalled 15,808 people, 11% and 16% higher than Q2 2023 and Q2 2019 respectively. Visitors travelling for business purposes totalled 7,674 people; 1% higher than Q2 2023, but 28% lower than Q2 2019.
- 49% of visitors during Q2 2024 were from the UK, 7% from France, 6% from Jersey and 11% from elsewhere (including Alderney, Sark and Herm). The country of residence was unknown for 26%, who were visiting on a yacht or cruise ship. The number of visitors whose country of residence was Jersey during Q2 2024 (6,137 people) increased by 18% from Q2 2023 and 21% from Q2 2019.
- The average length of stay for those who stayed at least one night but no more than 30 nights in Q2 2024, was 4.8 nights and compares with 4.7 nights in Q2 2023 and 4.4 nights in Q2 2019. 63% of the visitors that stayed overnight stayed in hotels, 21% stayed with friends or relatives and 16% stayed in other accommodation (which includes guest houses, campsites and self catering units).
- There were 1,917, 1,917 and 1,914 units of visitor accommodation available for booking in April, May and June 2024 respectively. The occupancy of available units was 62% in April, 74% in May and 79% in June 2024.
- The net promoter score given by visitors leaving by aeroplane or ferry was 60 percentage points. Higher scores (of 68 and 67 percentage points respectively) were given by visitors seeing friends/family and those visiting for leisure than by those visiting for business (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 Q2 2024, as shown in **Table 2.1.1**, was 155,903, 9% lower than Q2 2023 and 32% lower than pre COVID-19 passenger volumes in Q2 2019.

56% of all departing passengers travelled by aeroplane in Q2 2024, 87,384 people, 1% lower than Q2 2023 and 19% lower than Q2 2019. 28% of all passengers travelled by ferry in Q2 2024, 44,105 people, 2% lower than Q2 2023 and 13% lower than Q2 2019.

**Table 2.1.1 Passenger volumes**

	Q2 2019	Q2 2023	Q2 2024	Annual % change	5 yr % change
Passengers departing Guernsey by aeroplane	108,517	88,298	87,384	-1%	-19%
Passengers departing Guernsey by ferry	50,633	44,948	44,105	-2%	-13%
Passengers departing Guernsey by cruise ship and yacht	70,236*	37,708*	24,414	-35%	-65%
<b>Total departing passengers</b>	<b>229,386</b>	<b>170,954</b>	<b>155,903</b>	<b>-9%</b>	<b>-32%</b>

\*Between Q2 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.

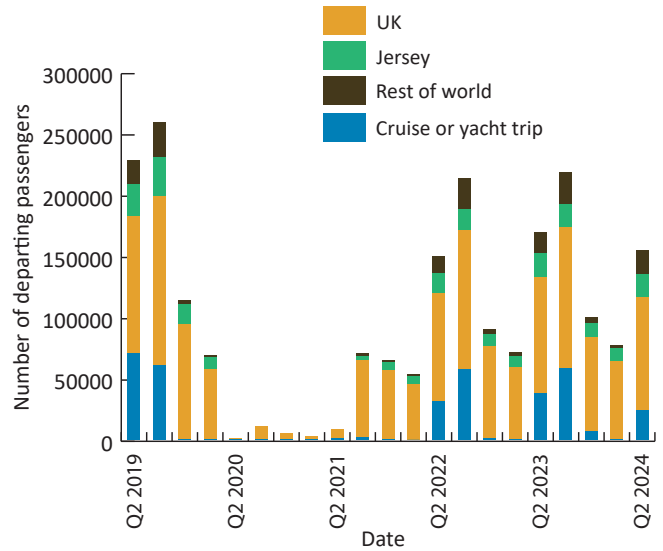
## 2.2 Passenger volumes by destination

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.

59% of all passengers departed Guernsey for the UK, totalling 91,887 people in Q2 2024, 4% lower than Q2 2023 and 18% lower than Q2 2019. 13% of all passengers departing Guernsey were travelling to Jersey and totalled 20,254 people in Q2 2024, 3% lower than Q2 2023 and 26% lower than Q2 2019. 12% of passengers departed Guernsey for the rest of the world and totalled 19,348 people in Q2 2024, 13% higher than Q2 2023, but 1% lower than Q2 2019. 16% of passengers departed Guernsey on a cruise or yacht trip in Q2 2024, 24,414 people.

**Figure 2.2.1 Passenger volumes by destination**



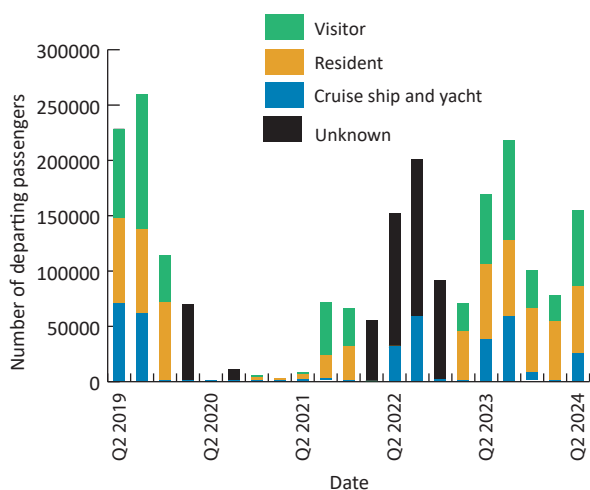
**Table 2.2.1 Passenger volumes by destination**

	Q2 2019	Q2 2023	Q2 2024	Annual % change	5 yr % change
Passengers departing Guernsey for United Kingdom	112,121	95,222	91,887	-4%	-18%
Passengers departing Guernsey for Jersey	27,501	20,905	20,254	-3%	-26%
Passengers departing Guernsey for rest of world	19,528	17,119	19,348	13%	-1%
Passengers departing Guernsey on cruise or yacht trip	70,236*	37,708*	24,414	-35%	-65%
<b>Total departing passengers</b>	<b>229,386</b>	<b>170,954</b>	<b>155,903</b>	<b>-9%</b>	<b>-32%</b>

\*Between Q2 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. 12% of departing passengers were surveyed in Q2 2024 (stratified by destination and port), which provides statistics with 95% confidence that they are accurate to within 1%. Survey results are applied to overall passenger volumes to give figures for the whole quarter.

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

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

**Table 2.3.1 Visitor and resident passenger volumes**

	Q2 2019	Q2 2023	Q2 2024	Annual % change	5 yr % change
Residents departing Guernsey by aeroplane	58,397	50,301	47,824	-5%	-18%
Residents departing Guernsey by ferry	17,761	16,807	13,008	-23%	-27%
Visitors departing Guernsey by aeroplane	49,519	36,458	39,055	7%	-21%
Visitors departing Guernsey by ferry	32,707	27,810	30,998	11%	-5%
Visitors departing Guernsey by cruise ship and yacht	70,236*	37,708*	24,414	-35%	-65%
<b>Total departing residents</b>	<b>76,158</b>	<b>67,107</b>	<b>60,832</b>	<b>-9%</b>	<b>-20%</b>
<b>Total departing visitors</b>	<b>152,462</b>	<b>101,977</b>	<b>94,467</b>	<b>-7%</b>	<b>-38%</b>
<b>Total visitors returning to Guernsey later</b>	<b>766</b>	<b>1,870</b>	<b>604</b>	<b>-68%</b>	<b>-21%</b>

\*Between Q2 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

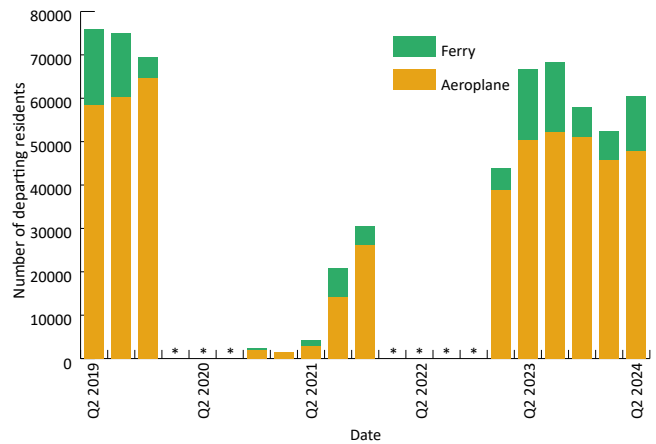
As shown in **Table 2.3.1** and **Figure 2.3.1**, 60,832 passengers, 39% of those departing Guernsey in Q2 2024, were residents, whilst 61% of those departing Guernsey were visitors (94,467 passengers). A small proportion, less than 1%, 604 visitors reported that they were returning to Guernsey later. 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.

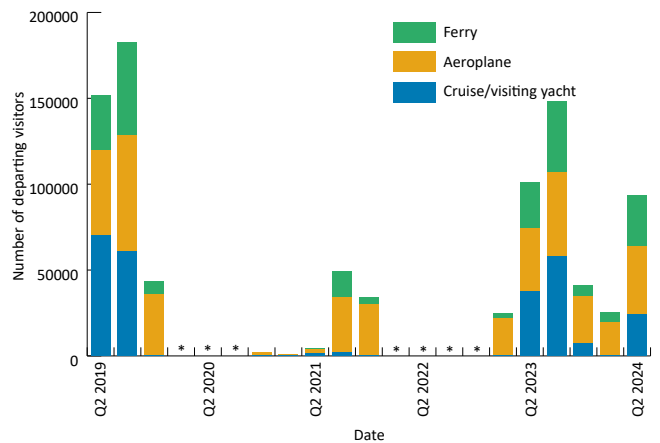
**Figure 2.3.2** shows the volume of residents travelling by ferry and aeroplane each quarter. In Q2 2024, 79%, 47,824 residents travelled by aeroplane, the remainder, 21%, 13,008 residents travelled by ferry. The number of residents travelling by aeroplane in Q2 2024 was 18% lower than the number travelling by aeroplane in Q2 2019 and 5% lower than the number travelling by aeroplane in Q2 2023. The number of residents travelling by ferry in Q2 2024 was 27% lower than the number travelling by ferry in Q2 2019 and 23% lower than the number travelling by ferry in Q2 2023.

**Figure 2.3.3** shows the volume of visitors travelling by ferry, aeroplane, cruise ship/visiting yacht each quarter. In Q2 2024, 41%, 39,055 visitors travelled by aeroplane, 33%, 30,998 visitors travelled by ferry and 26%, 24,414 people travelled by visiting yacht or cruise ship. The number of visitors travelling by aeroplane in Q2 2024 was 21% lower than the number travelling by aeroplane in Q2 2019, but 7% higher than the number of visitors travelling by aeroplane in Q2 2023. The number of visitors travelling by ferry in Q2 2024 was 5% lower than the number travelling by ferry in Q2 2019, but 11% higher than the number travelling by ferry in Q2 2023.

**Figure 2.3.2 Resident passenger volumes**



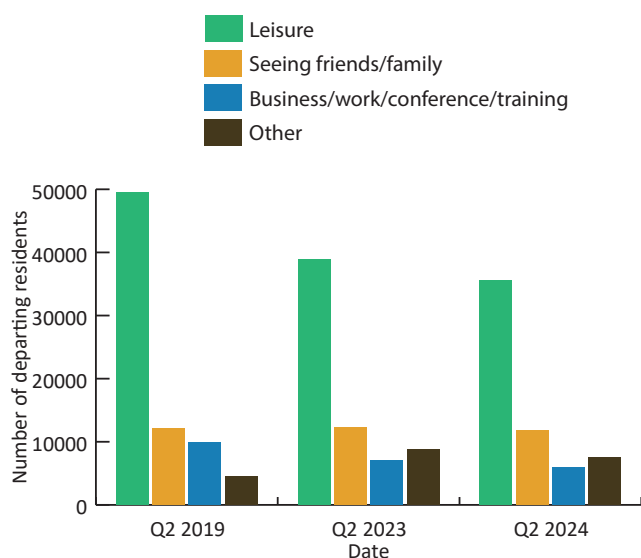
**Figure 2.3.3 Visitor passenger volumes**



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

## 3.1 Residents - main purpose of trip away from Guernsey

**Figure 3.1.1 Residents - main purpose of trip away from Guernsey**



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

In Q2 2024, 59%, 35,626 residents reported the main purpose of their trip away from Guernsey was for leisure, 28% lower than the 49,576 residents who reported they were travelling for leisure in Q2 2019 and 8% lower than the 38,906 residents travelling for leisure purposes in Q2 2023.

19% of all residents, 11,770 people cited they were seeing friends/family, 3% lower than the 12,173 who reported they were travelling to see friends/family in Q2 2019 and 4% lower than the 12,279 residents travelling to see friends/family in Q2 2023.

10%, 5,881 residents were leaving on business (41% lower than the 9,909 residents in Q2 2019 and 17% lower than the 7,063 residents travelling for business in Q2 2023) and 12%, 7,555 were leaving for other reasons (4,500 in Q2 2019). Other reasons include residents travelling for medical/hospital purposes, residents participating in sport and residents on a school trip/visit.

**Table 3.1.1 Residents - main purpose of trip away from Guernsey**

	Q2 2019	Q2 2023	Q2 2024	Annual % change	5 yr % change
<b>Leisure (e.g. holiday/vacation/break)</b>	49,576	38,906	35,626	-8%	-28%
<b>Seeing friends/family (including weddings, funerals etc)</b>	12,173	12,279	11,770	-4%	-3%
<b>Business/work/conference/training</b>	9,909	7,063	5,881	-17%	-41%
<b>Other</b>	4,500	8,859	7,555	-15%	68%
<b>Total</b>	76,158	67,107	60,832	-9%	-20%

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



## 3.2 Residents - destination and length of trip away from Guernsey

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

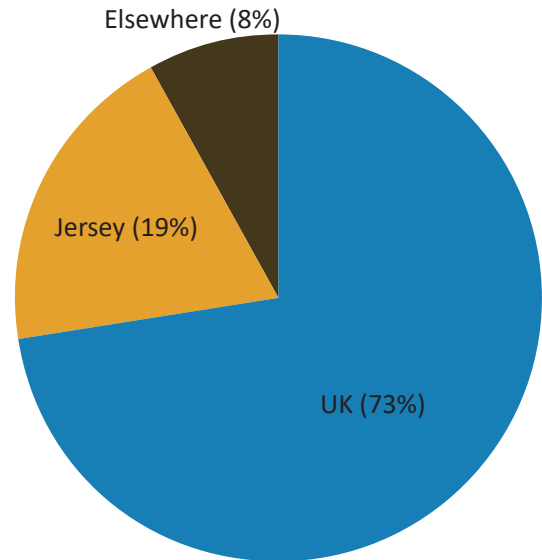
The majority, 73% of residents, 44,679 people were travelling to the UK in Q2 2024, (in Q2 2019 the equivalent figure was also 73% of residents and 55,421 people).

13% of residents travelled to Jersey, 7,954 people, for Q2 2019 this was 19% of residents and 14,630 people. The number of residents travelling to Jersey during Q2 2024 was 46% lower than for Q2 2019 and 27% lower than Q2 2023. 13% of residents, 8,200 people travelled elsewhere during Q2 2024 (8%, 6,107 residents travelled elsewhere in Q2 2019), 34% higher than Q2 2019 and 2% higher than Q2 2023.

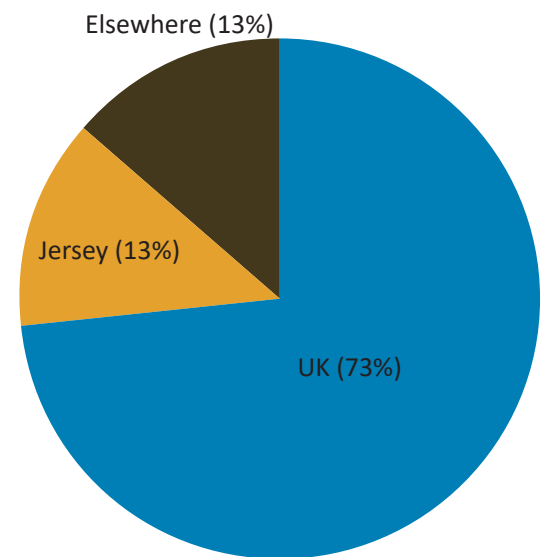
67% of all those surveyed during Q2 2024 stated that their final destination was nearby to the airport/port travelled to. Residents travelling to London Gatwick were most likely to state that their final destination was not nearby; 54% said their final destination was nearby.

Day trips accounted for 6% of all resident's trips during Q2 2024, compared with 7% during Q2 2023. The average length of trip by residents during Q2 2024 was 6.3 nights, and compares with 6.7 nights during Q2 2023.

**Figure 3.2.1 Residents - destination port Q2 2019**



**Figure 3.2.2 Residents - destination port Q2 2024**



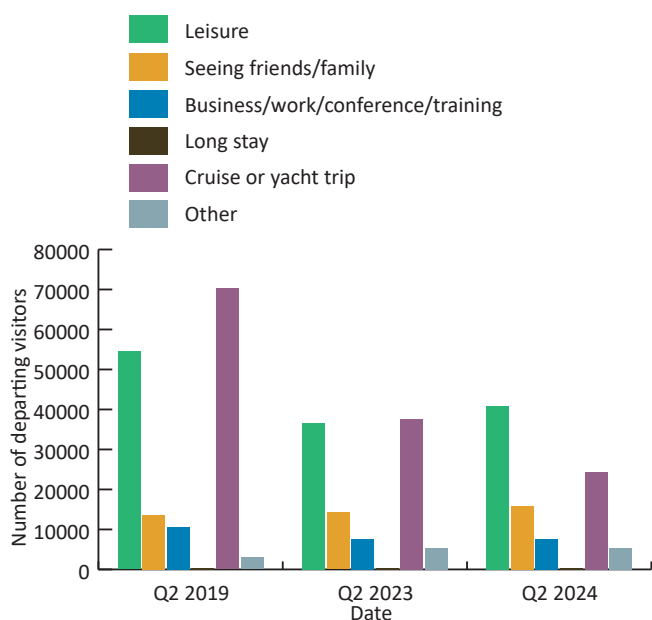
**Table 3.2.1 Residents - destination port**

	Q2 2019	Q2 2023	Q2 2024	Annual % change	5 yr % change
<b>United Kingdom</b>	55,421	48,133	44,679	-7%	-19%
<b>Jersey</b>	14,630	10,906	7,954	-27%	-46%
<b>Rest of world</b>	6,107	8,069	8,200	2%	34%
<b>Total</b>	76,158	67,107	60,832	-9%	-20%

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**



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

In Q2 2024, 40,821 visitors reported the main purpose of their trip to Guernsey was for leisure (54,485 in Q2 2019 and 36,633 in Q2 2023). 15,808 visitors cited they were seeing friends/family (13,650 in Q2 2019 and 14,248 in Q2 2023). 7,674 visitors were here for business, which compares with 10,710 in Q2 2019, 28% lower, and 7,580 business visitors in Q2 2023, 1% higher. 5,402 visitors were here for other reasons during Q2 2024. 1,107 or 20% of those visitors who cited other reasons mentioned sport, be it as a participant or spectator (representing 1% of all visitors in Q2 2024). The other category also includes visitors to Guernsey in transit, visitors on a school trip/visit and visitors in Guernsey for medical/hospital purposes.

24,414 people visited by yacht or cruise ship during Q2 2024, 35% lower than Q2 2023 and 65% lower than Q2 2019. 349 visitors during Q2 2024 were long stay visitors, having stayed more than 30 nights but less than 1 year. The majority of long stay visitors were in Guernsey for work reasons. 57% of all visitors to Guernsey during Q2 2024 said they had visited Guernsey before, 4% of whom had visited Guernsey on a cruise.

**Table 4.1.1 Visitors - main purpose of trip to Guernsey**

	Q2 2019	Q2 2023	Q2 2024	Annual % change	5 yr % change
Leisure (e.g. holiday/vacation/break)	54,485	36,633	40,821	11%	-25%
Seeing friends/family (including weddings, funerals etc)	13,650	14,248	15,808	11%	16%
Business/work/conference/training	10,710	7,580	7,674	1%	-28%
Long stay (more than 30 nights but less than 1 year for work/other purpose)	391	439	349	-21%	-11%
Cruise or yacht trip*	70,236*	37,708*	24,414	-35%	-65%
Other	2,990	5,368	5,402	1%	81%
<b>Total</b>	<b>152,462</b>	<b>101,977</b>	<b>94,467</b>	<b>-7%</b>	<b>-38%</b>

\*Between Q2 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.

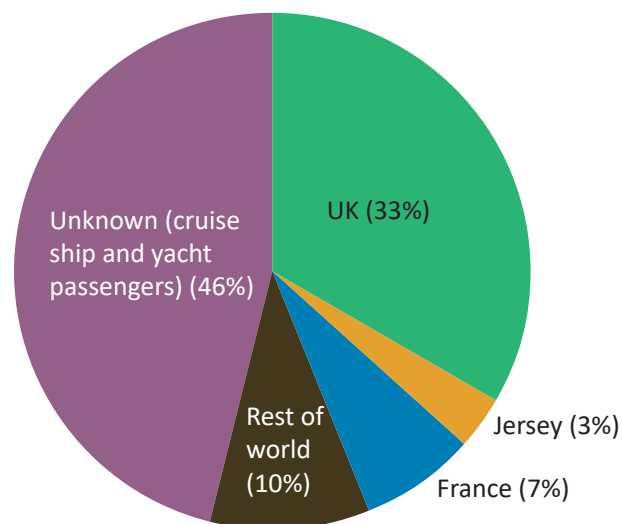
## 4.2 Visitors - country of residence

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

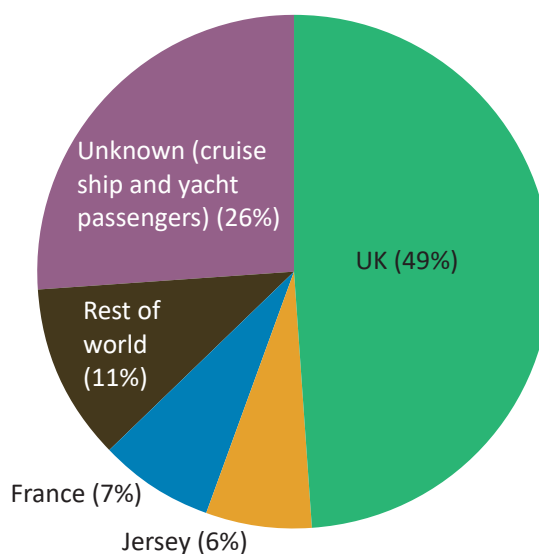
During Q2 2024, 49% of all visitors, 46,349 people reported their country of residence was the UK (33%, 50,848 in Q2 2019). 6%, 6,137 visitors were from Jersey (3%, 5,087 in Q2 2019). 7%, 6,967 visitors were from France (7%, 11,325 in Q2 2019), 11%, 10,600 visitors were from the Rest of the world (10%, 14,967 in Q2 2019), and 26%, 24,414 visitors' country of residence was unknown, as they were visiting by cruise ship or yacht (46%, 70,236 in Q2 2019).

As shown in **Table 4.2.1**, in Q2 2024 there were 6% more visitors whose country of residence was the UK compared to Q2 2023, but 9% fewer than Q2 2019. In Q2 2024 there were 18% more visitors whose country of residence was Jersey compared with Q2 2023 and 21% more than Q2 2019. In Q2 2024 there were 20% more visitors whose country of residence was France compared with Q2 2023, but 38% fewer than 2019. There were 14% more visitors whose country of residence was Rest of the world compared with Q2 2023, but 29% fewer than Q2 2019.

**Figure 4.2.1 Visitors - country of residence Q2 2019**



**Figure 4.2.2 Visitors - country of residence Q2 2024**



**Table 4.2.1 Visitors - country of residence**

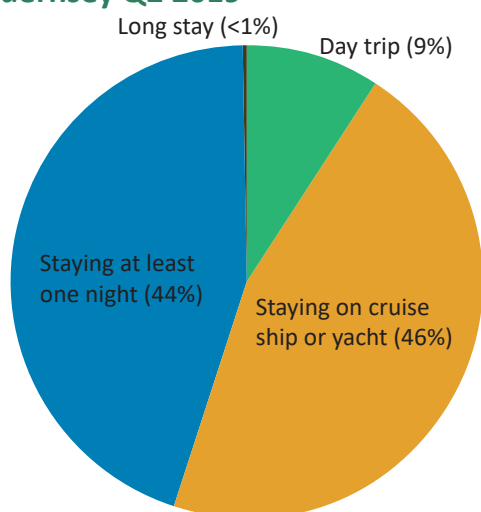
	Q2 2019	Q2 2023	Q2 2024	Annual % change	5 yr % change
<b>United Kingdom</b>	50,848	43,909	46,349	6%	-9%
<b>Jersey</b>	5,087	5,217	6,137	18%	21%
<b>France</b>	11,325	5,815	6,967	20%	-38%
<b>Rest of world</b>	14,967	9,327	10,600	14%	-29%
<b>Unknown (cruise ship and yacht passengers)*</b>	70,236*	37,708*	24,414	-35%	-65%
<b>Total</b>	152,462	101,977	94,467	-7%	-38%

\*Between Q2 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.

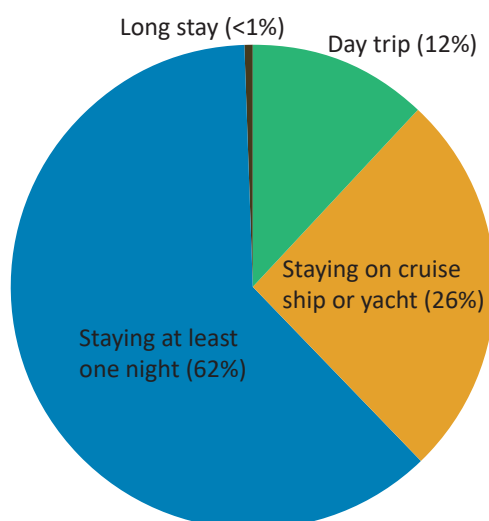
NB: Figures may not sum exactly to totals due to rounding.

## 4.3 Visitors - length of stay in Guernsey

**Figure 4.3.1 Visitors - length of stay in Guernsey Q2 2019**



**Figure 4.3.2 Visitors - length of stay in Guernsey Q2 2024**



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

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

In Q2 2024, 11,516 people visited Guernsey on a day trip, representing 12% of all visitors (14,026 people, 9% in Q2 2019). The majority, 62% of visitors, 58,188 people, stayed at least one night but less than 31 nights (67,809 people, 44% in Q2 2019). During Q2 2024, less than 1% of visitors were long stay visitors (349 people).

Comparison between Q2 2024, Q2 2023 and Q2 2019 reveals that in Q2 2024 there were 18% fewer visitors on a day trip compared with Q2 2019, but 8% more visitors on a day trip compared with Q2 2023. 14% fewer visitors stayed at least one night (but less than 31 nights) compared with Q2 2019, but 9% more than Q2 2023.

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

	Q2 2019	Q2 2023	Q2 2024	Annual % change	5 yr % change
Day trip to Guernsey	14,026	10,660	11,516	8%	-18%
Staying on a cruise ship or yacht*	70,236*	37,708*	24,414	-35%	-65%
Staying at least one night in Guernsey (but 30 or less nights)	67,809	53,169	58,188	9%	-14%
Long stay (more than 30 nights but less than 1 year)	391	439	349	-21%	-11%
<b>Total</b>	<b>152,462</b>	<b>101,977</b>	<b>94,467</b>	<b>-7%</b>	<b>-38%</b>

\*Between Q2 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

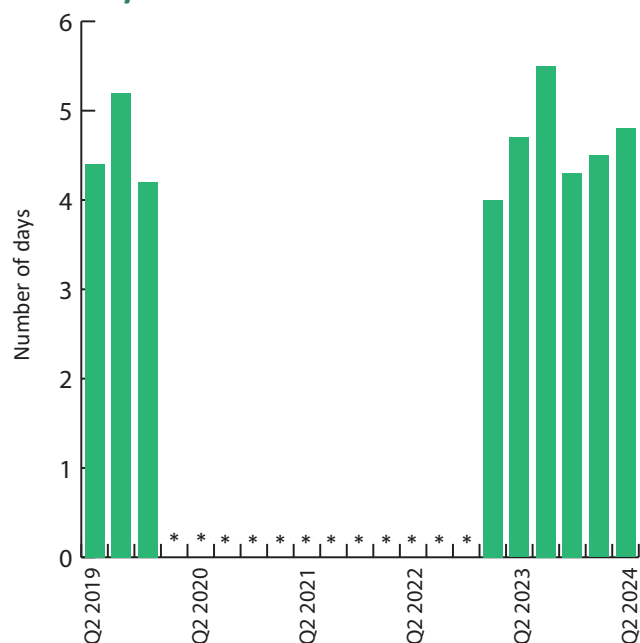
As shown in **Figure 4.3.3** visitor length of stay varies by quarter and displays some seasonality. There is a tendency for visitors to stay longer during Quarter 2 and Quarter 3 each year (in Q3 2019 the average length of stay for visitors was 5.2 nights) whilst visitors during Quarter 1 and Quarter 4 tend to stay in Guernsey for shorter durations (in Q1 2019 the average length of stay was 4.3 nights). For this reason, comparisons of length of stay are made with equivalent periods in previous years. Those departing on cruise ships or yachts are not asked to complete the same survey and therefore the figures presented on this page represent only those travelling by aeroplane or ferry. Trends in length of stay will continue to be monitored and reported in future editions of this bulletin.

The average length of stay for visitors staying at least one night but less than 31 nights was 4.8 nights in Q2 2024 and compares with 4.7 nights in Q2 2023, and 4.4 nights in Q2 2019. The slight increase in average length of stay between Q2 2023 and Q2 2024 is due to a combination of a slightly higher proportion of visitors travelling by ferry in Q2 2024, compared with Q2 2023 (ferry visitors tend to stay longer than those travelling by aeroplane) and an increase in the length of stay for those visitors who did travel by aeroplane (4.6 nights in Q2 2023, compared with 4.7 nights in Q2 2024). The length of stay for visitors who travelled by ferry has also increased from 4.8 nights in Q2 2023 to 4.9 nights in Q2 2024.

The average length of stay multiplied by the number of staying visitors equates to the number of bed nights spent in Guernsey each quarter, as shown in **Figure 4.3.4**. As with the length of stay data there is seasonality in the figures and comparisons are made with equivalent periods in previous years.

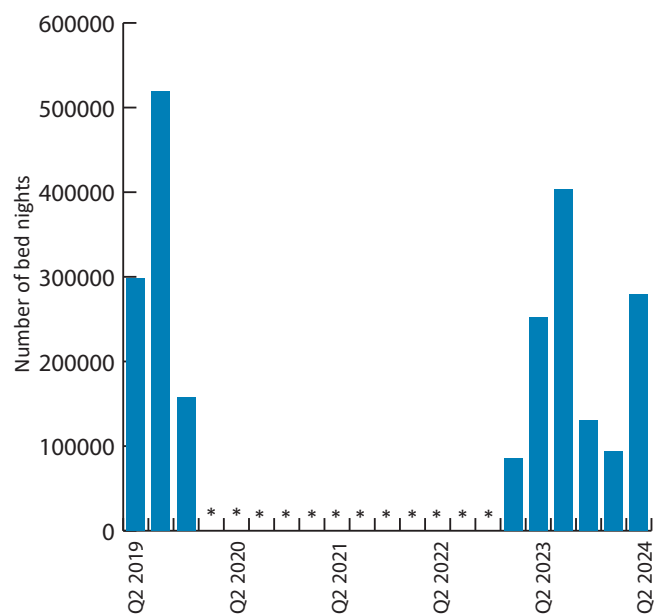
During Q2 2024, visitors spent the equivalent of 279,275 bed nights in Guernsey which compares with 252,099 bed nights in Q2 2023 (an 11% increase) and 298,235 bed nights in Q2 2019 (a 6% decrease).

**Figure 4.3.3 Visitors - length of stay in Guernsey**



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

**Figure 4.3.4 Visitors - bed nights in Guernsey**



\*Between Q1 2020 and Q4 2022 length of stay by visitors was not determined. When restrictions were put in place to reduce the impact of COVID-19, exit passenger surveys at the airport and harbour were suspended. In Q1 2023 exit surveys were re-instigated and bed nights could again be reported.

## 4.4 Visitors - 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.

During Q2 2024, 19% of all visitors on a day trip to Guernsey, 6,910 people, reported the main purpose of their trip to Guernsey was for leisure (24% lower than the 9,151 people who reported their day trip was for leisure purposes in Q2 2019, but 15% higher than the 6,026 who reported their day trip was for leisure in Q2 2023). 258 visitors who visited Guernsey on a day trip, 1% of day trippers, cited they were seeing friends/family (278 in Q2 2019 and 207 in Q2 2023), 1,532 were here for business, 4% of all day trip visitors, (2,744 in Q2 2019 and 2,255 in Q2 2023) and 2,817 day trip visitors (8%) were here for other reasons (1,853 in Q2 2019 and 2,172 in Q2 2023).

Comparison between Q2 2024, Q2 2023 and Q2 2019 reveals that in Q2 2024 there were 24% fewer day trippers visiting for leisure purposes than Q2 2019, but 15% more than Q2 2023. 7% fewer day visitors seeing friends/family than Q2 2019 but 25% more than Q2 2023. In Q2 2024 there were 44% and 32% fewer day visitors who travelled for business/work compared with Q2 2019 and Q2 2023 respectively.

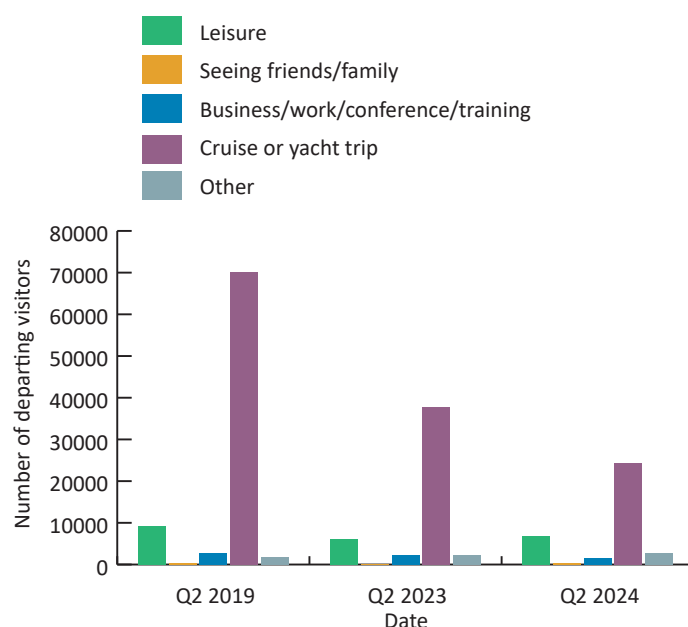
**Table 4.4.1 Main purpose of trip of day trip visitors**

	Q2 2019	Q2 2023	Q2 2024	Annual % change	5 yr % change
<b>Leisure (e.g. holiday/vacation/break)</b>	9,151	6,026	6,910	15%	-24%
<b>Seeing friends/family (including weddings, funerals etc)</b>	278	207	258	25%	-7%
<b>Business/work/conference/training</b>	2,744	2,255	1,532	-32%	-44%
<b>Cruise or yacht trip*</b>	70,236*	37,708*	24,414	-35%	-65%
<b>Other</b>	1,853	2,172	2,817	30%	52%
<b>Total</b>	84,262	48,368	35,930	-26%	-57%

\*Between Q2 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.

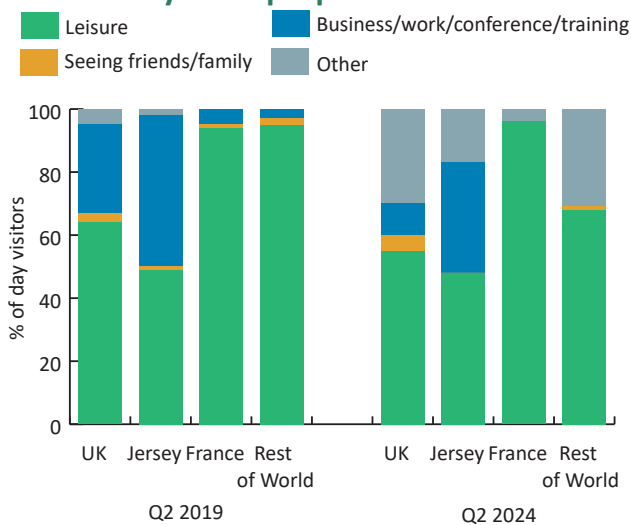
NB: Figures may not sum exactly to totals due to rounding.

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



## 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**. The analysis presented on this page is based on visitors travelling to Guernsey by aeroplane and ferry only and does not include those visiting by cruise ship or yacht.

In Q2 2024, 55% of day trip visitors from the UK reported the main purpose of their day trip to Guernsey was for leisure, compared with 64% in Q2 2019. 10% of day trip visitors from the UK were here for business purposes, compared with 28% in Q2 2019, and 30% of day trip visitors from the UK were in Guernsey for other reasons.

**Table 4.4.2 Q2 2019 Day trip visitors - country of residence by main purpose of visit**

	UK (%)	Jersey (%)	France (%)	Rest of World (%)
Leisure (e.g. holiday/vacation/break)	64	49	94	95
Seeing friends/family (including weddings, funerals etc)	3	1	1	2
Business/work/conference/training	28	48	5	3
Other	5	2	<1	<1
<b>Total</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>

The principal reason for day trip visits in Q2 2024 from those whose country of residence is Jersey were leisure reasons, 48%; this compares with 49% in Q2 2019. 35% of day trip visitors whose country of residence is Jersey visited for business reasons in Q2 2024, which compares with 48% in Q2 2019.

Visitors from France were most likely to report in Q2 2024 that their main purpose of visit was leisure; 96%. This compares with 94% in Q2 2019.

68% of day trip visitors to Guernsey during Q2 2024 whose country of residence was the Rest of the world reported they were in Guernsey for leisure, compared with 95% in Q2 2019. 31% of day trip visitors from the Rest of the world were in Guernsey for other purposes during Q2 2024. The other category includes visitors to Guernsey in transit, visitors on a school trip/visit, sports participants, sports spectators and visitors in Guernsey for medical/hospital purposes.

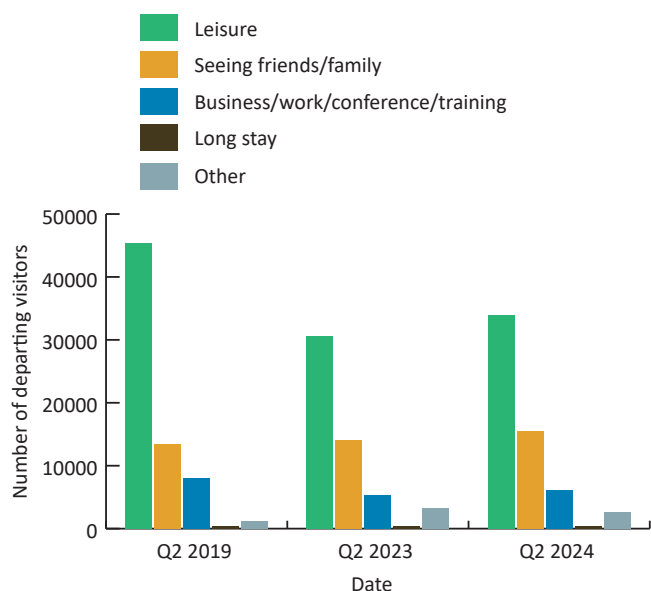
**Table 4.4.3 Q2 2024 Day trip visitors - country of residence by main purpose of visit**

	UK (%)	Jersey (%)	France (%)	Rest of World (%)
Leisure (e.g. holiday/vacation/break)	55	48	96	68
Seeing friends/family (including weddings, funerals etc)	5	0	0	1
Business/work/conference/training	10	35	0	0
Other	30	17	4	31
<b>Total</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>

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**



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.

In Q2 2024, 58% or 33,911 of all staying visitors reported the main purpose of their trip to Guernsey was for leisure (45,334 in Q2 2019 and 30,607 in Q2 2023). 27% or 15,550 of staying visitors cited they were seeing friends/family (compared with 13,372 who reported they were seeing friends/family in Q2 2019 and 14,041 in Q2 2023). 10%, 6,142 were here for business or work reasons (7,966 in Q2 2019 and 5,326 in Q2 2023) and 4%, 2,585 were here for other reasons (1,136 in Q2 2019 and 3,196 in Q2 2023). Less than 1% or 349 visitors were long stay visitors, having stayed more than 30 nights but less than 1 year, in Q2 2024 (391 visitors in Q2 2019 and 439 in Q2 2023).

Comparison between Q2 2024, Q2 2023 and Q2 2019 reveals that in Q2 2024 there were 25% fewer staying visitors visiting for leisure purposes compared to Q2 2019, but 11% more than Q2 2023. The number of visitors seeing friends/family in Q2 2024 was 16% higher than Q2 2019 and 11% higher than Q2 2023. In Q2 2024 23% fewer staying visitors travelled for business/work compared with Q2 2019, but 15% more travelled for business/work compared with Q2 2023.

**Table 4.5.1 Main purpose of trip of staying visitors**

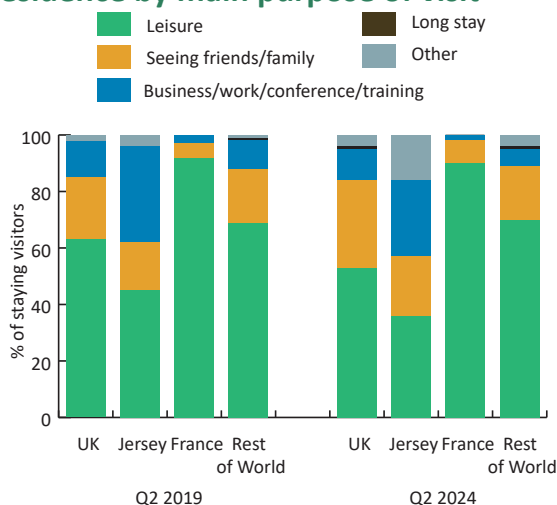
	Q2 2019	Q2 2023	Q2 2024	Annual % change	5 yr % change
<b>Leisure (e.g. holiday/vacation/break)</b>	45,334	30,607	33,911	11%	-25%
<b>Seeing friends/family (including weddings, funerals etc)</b>	13,372	14,041	15,550	11%	16%
<b>Business/work/conference/training</b>	7,966	5,326	6,142	15%	-23%
<b>Long stay (more than 30 nights but less than 1 year)</b>	391	439	349	-21%	-11%
<b>Other</b>	1,136	3,196	2,585	-19%	127%
<b>Total</b>	68,200	53,608	58,537	9%	-14%

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



## 4.5 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 Q2 2019 Staying visitors - country of residence by main purpose of visit**

	UK (%)	Jersey (%)	France (%)	Rest of World (%)
Leisure (e.g. holiday/vacation/break)	63	45	92	69
Seeing friends/family (including weddings, funerals etc)	22	17	6	19
Business/work/conference/training	13	34	3	10
Long stay (more than 30 nights but less than 1 year)	<1	<1	<1	1
Other	1	4	<1	1
<b>Total</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>

**Table 4.5.3 Q2 2024 Staying visitors - country of residence by main purpose of visit**

	UK (%)	Jersey (%)	France (%)	Rest of World (%)
Leisure (e.g. holiday/vacation/break)	53	36	90	70
Seeing friends/family (including weddings, funerals etc)	31	21	8	19
Business/work/conference/training	11	27	2	6
Long stay	<1	0	0	1
Other	4	16	0	4
<b>Total</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>

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 Q2 2024, 53% of staying visitors from the UK reported the main purpose of their trip to Guernsey was for leisure, compared with 63% in Q2 2019. 31% of staying visitors from the UK were seeing friends/family, compared to 22% in Q2 2019, and 11% of staying visitors from the UK were in Guernsey for business/work reasons.

The principal reasons for staying visits in Q2 2024 from those with country of residence of Jersey were leisure and business; 36% and 27% respectively. This compares with 45% and 34% in Q2 2019. 16% of staying visitors from Jersey were in Guernsey for other reasons. The other category includes visitors to Guernsey in transit, visitors on a school trip/visit, sports participants, sports spectators and visitors in Guernsey for medical/hospital purposes. Almost half of all staying visitors in Q2 2024 from Jersey who cited other reasons were either sports participants or spectators.

Visitors from France were most likely to report in Q2 2024 that their main purpose of visit was for leisure, 90%. This compares with 92% of staying visitors from France in Q2 2019. 8% whose country of residence was France reported they were visiting to see friends/family in Q2 2024. 2% cited they were in Guernsey for business purposes.

In Q2 2024, 70% of staying visitors whose country of residence was the Rest of the world reported they were visiting Guernsey for leisure purposes and a further 19% were in Guernsey to see friends/family. 6% of staying visitors whose country of residence was the Rest of the world reported they were staying in Guernsey for business reasons and 1% were long stay visitors (having stayed more than 30 nights but less than 1 year).

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

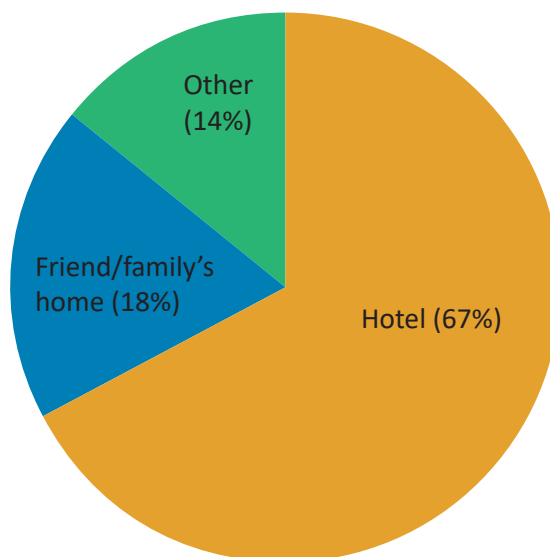
## 4.6 Visitors - accommodation of staying visitors

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.

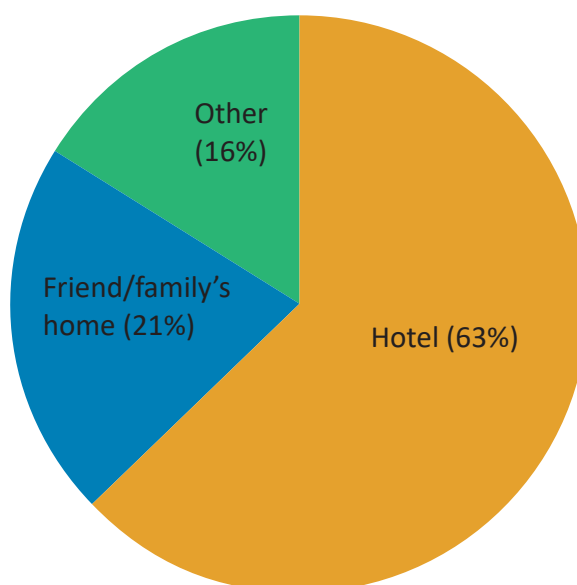
As shown in **Figure 4.6.1**, **Figure 4.6.2** and **Table 4.6.1**, in Q2 2024, 63% of all visitors staying in Guernsey stayed in hotels, (36,663 people), 21% stayed with friends/family (12,290 people) and 16% stayed in other accommodation (9,234 people). The other category includes guest houses, any accommodation listed on Airbnb or other online booking portals, self-catering units and campsites etc.

Comparison between Q2 2024, Q2 2023 and Q2 2019 reveals that in Q2 2024 there were 20% fewer visitors staying in hotels than Q2 2019, but 12% more visitors staying in hotels than Q2 2023. In Q2 2024 there were 2% fewer visitors staying in friend/family's homes than Q2 2019, but 20% more than Q2 2023. 3% fewer visitors stayed in Other accommodation in Q2 2024 compared with Q2 2019 and 10% fewer than Q2 2023.

**Figure 4.6.1 Accommodation for staying visitors Q2 2019**



**Figure 4.6.2 Accommodation for staying visitors Q2 2024**



**Table 4.6.1 Accommodation for staying visitors**

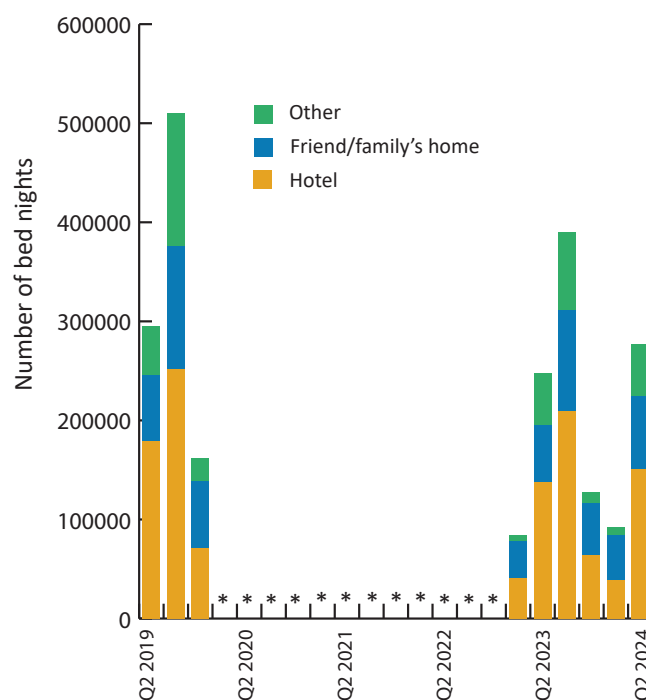
	Q2 2019	Q2 2023	Q2 2024	Annual % change	5 yr % change
<b>Hotel</b>	45,745	32,682	36,663	12%	-20%
<b>Friend/family's home</b>	12,498	10,218	12,290	20%	-2%
<b>Other (including guest houses, accommodation listed on Airbnb or other online booking portals, self-catering units and campsites etc)</b>	9,566	10,269	9,234	-10%	-3%
<b>Total staying visitors</b>	67,809	53,169	58,188	9%	-14%

## 4.6 Visitors - accommodation of staying visitors

Figure 4.6.3 shows the number of bed nights each quarter for staying visitors in Guernsey by accommodation type. Table 4.6.2 shows length of stay by accommodation type. The number of bed nights varies by quarter and displays seasonality. This is due to a higher number of visitors during Quarters 2 and 3 each year when compared with Quarters 1 and 4 and a tendency for visitors to stay longer during Quarter 2 and Quarter 3, when compared to Quarter 1 and Quarter 4. For this reason comparisons of number of bed nights and length of stay are made with equivalent periods in previous years.

On average visitors in hotels stayed 4.1 nights in Q2 2024, which equates to 151,344 bed nights (3.9 nights in Q2 2019, 4.2 nights in Q2 2023). During Q2 2024 the average length of stay with friends/family was 5.9 nights, equating to 72,731 bed nights (5.4 nights in Q2 2019 and 5.6 nights in Q2 2023) and the average length of stay in other accommodation (which includes guest houses, any accommodation listed on Airbnb or other online booking portals, self-catering units and campsites etc) was 5.8 nights (equating to 53,237 bed nights). The average stay in commercial accommodation in Q2 2024 which includes Hotels and other accommodation was 4.4 nights, which is a slightly longer duration than reported in Q2 2023 and Q2 2019.

Figure 4.6.3 Number of bed nights by accommodation for staying visitors



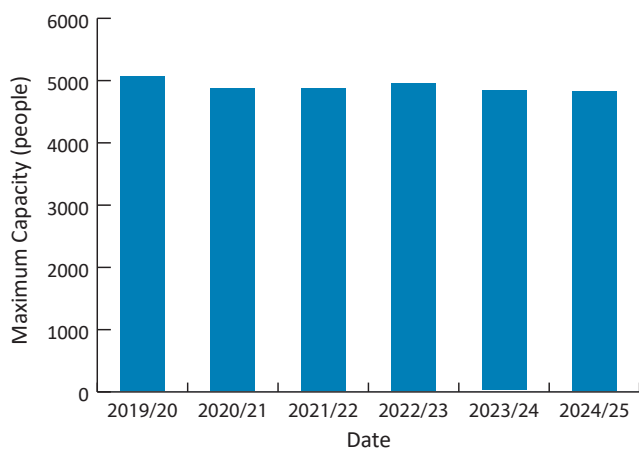
\*Between Q1 2020 and Q4 2022 length of stay by visitors was not determined. When restrictions were put in place to reduce the impact of COVID-19, exit passenger surveys at the airport and harbour were suspended. In Q1 2023 exit surveys were re-instigated and length of stay and number of bed nights could again be reported.

Table 4.6.2 Length of stay by accommodation

	Q2 2019 (nights)	Q2 2023 (nights)	Q2 2024 (nights)	Annual % change	5 yr % change
Hotel	3.9	4.2	4.1	-2%	6%
Friend/family's home	5.4	5.6	5.9	6%	10%
Other (including guest houses, accommodation listed on Airbnb or other online booking portals, self-catering units and campsites etc)	5.1	5.1	5.8	12%	12%
Average stay in commercial accommodation (includes hotel, guest houses, self-catering, Airbnb or other online booking portals and campsites)	4.2	4.3	4.4	Less than 1%	4%

## 5.1 Visitor accommodation - capacity

**Figure 5.1.1 Visitor accommodation capacity**



**Table 5.1.1 Visitor accommodation capacity**

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

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

**Table 5.1.2 Additional summer capacity**

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

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

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

The capacity of accommodation providers with an active boarding permit for the 2024 summer season and winter 2024/25 was 4,810, as shown in **Table 5.1.1**. Please note figures for 2024/25 differ from those provisional figures presented in the Q1 2024 bulletin, as the renewal process for 2024/25 was not complete when Q1 figures were published. Capacity for 201 more people was removed during 2022 and 2023, but part or all of this capacity is expected to be added back in once refurbishments have completed.

Each summer there is additional visitor accommodation provided by the campsites of Guernsey and Herm. **Table 5.1.2** indicates the maximum additional capacity provided by temporary glamping and camping structures during the summer season. For summer 2024, an additional 349 people can be accommodated in 66 units which include equipped tents, cabins, yurts and shepherd's huts. These figures do not include camping/motorhome pitches where visitors provide their own accommodation. The additional summer capacity will be recorded each year so trends in summer capacity can be monitored going forwards.

## 5.1 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 April, May and June 2024 include different accommodation types and sizes and statistics for these months are accurate to at least plus or minus 2% (at a confidence level of 95%). The responses are scaled up by the total amount of visitor accommodation (with both an active boarding permit and an aligned building use type) in order to give figures for the whole Island. 2023/24 boarding permit information was used to scale up the figures for the second, third and fourth quarters of 2023 and first quarter of 2024. 2024/25 boarding permit information was used to scale up the figures for the second quarter of 2024.

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

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

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

This information is only available from 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 1,917 visitor accommodation units in Q2 2024. During Q2 2024 there were very few visitor accommodation closures. The proportion of visitor accommodation units available to be booked was 100%, 100% and 99.8% in April 2024, May 2024 and June 2024 respectively.

**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
Jun 2023	1,902	0	1,902
Jul 2023	1,902	0	1,902
Aug 2023	1,902	0	1,902
Sep 2023	1,902	0	1,902
Oct 2023	1,858	44	1,902
Nov 2023	1,764	138	1,902
Dec 2023	1,744	158	1,902
Jan 2024	1,556	346	1,902
Feb 2024	1,601	301	1,902
Mar 2024	1,900	2	1,902
Apr 2024	1,917	0	1,917
May 2024	1,917	0	1,917
Jun 2024	1,914	3	1,917

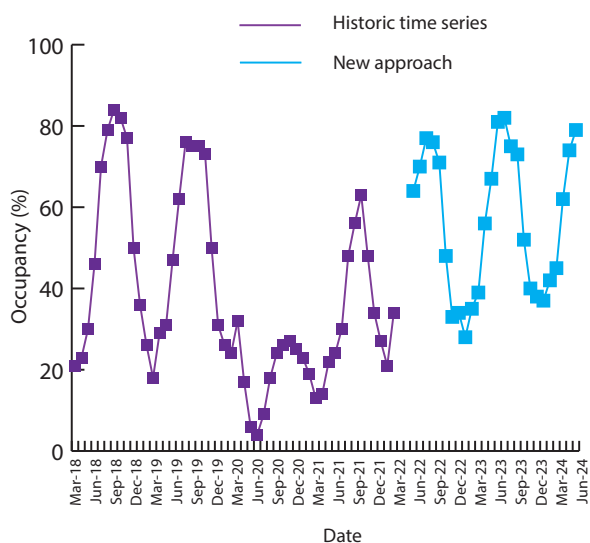
**Figure 5.1.3 Availability of visitor accommodation**



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

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

Occupancy is presented as a percentage of the number of available units (see p19). 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.

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 2024). Exemptions allowing long-stay visitors would normally apply only to self-catering establishments during the Winter Let period from 1st November to 31st March each year. There was a wave of cases of the Omicron variant of COVID-19, which impacted on the ability to collect full data in March and April 2022.

Occupancy of open units in 2024 has been increasing since January 2024 (37%). During Q2 2024 an occupancy of 62% was recorded in April 2024, 74% in May 2024 and 79% in June 2024, which compares with occupancy of 56% in April 2023, 67% in May 2023 and 81% in June 2023.

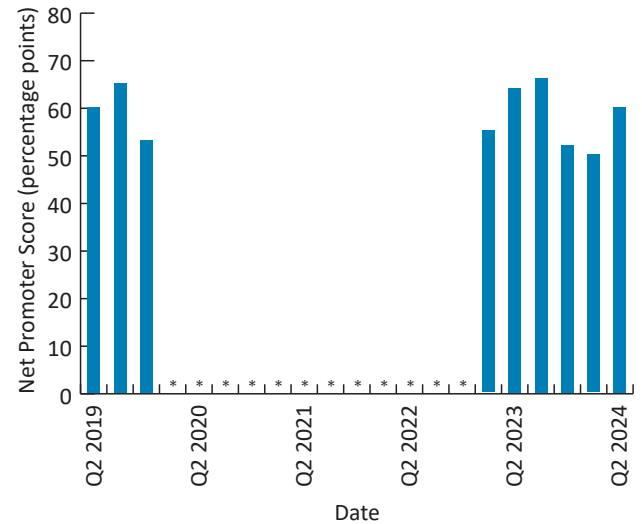
Additional information began being collected in June 2023, which makes it possible to determine that 14% of open units in April 2024 were occupied by long-stay guests. In May 2024 10% of open units were occupied by long-stay guests and in June 2024 8% of open units were occupied by long-stay guests. This means that long-stay guests represented 7 percentage points of the 79% occupancy of open units in June 2024.

## 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 survey and are not represented within net promoter scores. 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 surveys were suspended and the passenger breakdown 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 Q2 2024 was 60 percentage points and compares with 64 percentage points in Q2 2023 and 60 percentage points in Q2 2019. By main purpose of visit, those seeing friends/family had the highest net promoter score (68 percentage points) in Q2 2024, followed by leisure visitors, 67 percentage points. Those visiting on business had the lowest net promoter score, 31 percentage points, with many business travellers commenting that they haven't seen much during their visit. By country of residence, net promoter scores were highest for visitors from France in Q2 2024 (69 percentage points). Those visiting from Jersey had the lowest net promoter scores (26 percentage points). The net promoter score for those visiting from the UK was 63 percentage points. 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**

	Q2 2019	Q2 2023	Q2 2024
<b>Net Promoter Score (percentage points)</b>	60	64	60

## 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 Q2 2024, 8,296 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 15,654 passengers, which is 12% of the total number of passengers departing Guernsey during Q2 2024 (excluding those travelling within the islands of the Bailiwick and those departing by cruise ship or yacht).

All sample surveys are subject to a degree of statistical error. This quarter there were 8,296 interviews conducted and it was found that 53% 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 52% to 54%. 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 April, May and June 2024 include various different accommodation types and sizes and statistics for these months are accurate to within at least plus or minus 2% (at a confidence level of 95%). The responses are scaled up by the total amount of visitor accommodation (with both an active boarding permit and an aligned building use type) in order to give figures for the whole Island.

## 7.2 Contact details

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

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