

Guernsey Quarterly Travel and Visitor Accommodation Bulletin

Quarter 3 2024

Issue date 12th November 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.

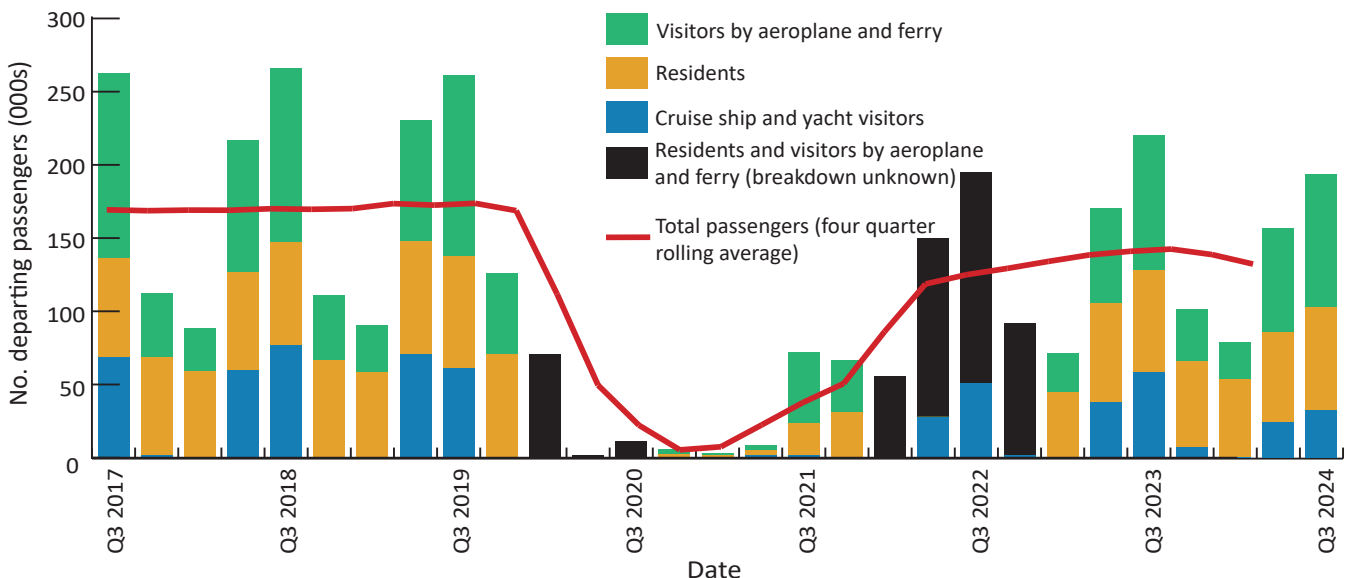
This is the seventh Guernsey Quarterly Travel and Visitor Accommodation Bulletin. Some data was not collected during the COVID-19 pandemic, but is now being collected again (although, in some cases, with a different methodology). Feedback was invited, following publication of the Q1 2023 Bulletin, and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

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

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

1.2 Headlines

Figure 1.2.1 Passenger volumes - departing passengers



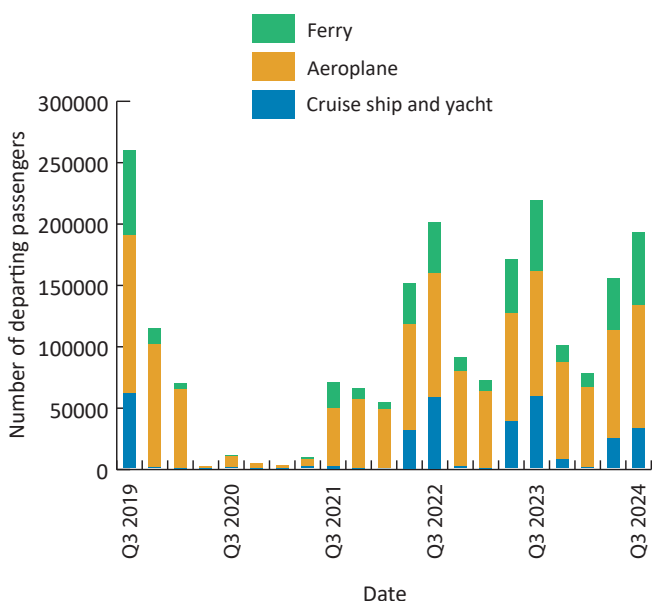
COVID-19 related requirements were put in place for people travelling into Guernsey in February 2020 and remained in place throughout 2021 with no non-essential travel allowed between 12th March 2020 and 20th May 2020 or between 14th January 2021 and 22nd March 2021. The requirements varied depending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

1.2 Headlines (continued)

- The total number of (resident and visiting) passengers (including cruise and yacht passengers) departing Guernsey was 193,338 during quarter three 2024. This compares with 219,167 during quarter three 2023; a decrease of 12%. It is 26% lower than in quarter three 2019.
- During the third quarter of 2024, 99,957 passengers departed by aeroplane, 60,978 by ferry and 32,403 by cruise ships or yachts.
- The number of passengers travelling by aeroplane in Q3 2024 was 2% lower than Q3 2023 and 22% lower than Q3 2019. The number of passengers travelling by ferry was 3% higher than Q3 2023 and 14% lower than Q3 2019. The number of cruise and yacht passengers during Q3 2024 was 44% lower than Q3 2023 and 47% lower than Q3 2019.
- The total number of departing visitors (including any cruise and yacht passengers) for Q3 2024 was 122,678; 18% lower than Q3 2023 and 33% lower than Q3 2019. The number of departing visitors excluding any cruise and yacht passengers for Q3 2024 was 90,275; 1% lower than Q3 2023 and 27% lower than Q3 2019.
- The total number of departing residents in Q3 2024 was 69,635; 1% higher than Q3 2023 and 8% lower than Q3 2019.
- Of the residents: 50,034 residents travelled by aeroplane, 4% lower than Q3 2023 and 17% lower than Q3 2019. 19,601 residents travelled by ferry, 18% higher than Q3 2023 and 30% higher than Q3 2019. 63% of residents travelled during Q3 2024 for leisure purposes and 69% travelled to the UK.
- Of the visitors: 49,312 visitors travelled by aeroplane during Q3 2023, 40,963 visitors travelled by ferry and 32,403 people visited by cruise ship or yacht. 63,853 people visited from the UK, a very similar number to Q3 2023, but 20% lower than Q3 2019. 8,228 people visited stated their country of residence was France, 3% higher than Q3 2023, but 48% lower than Q3 2019. Visitors from Jersey were 20% lower than Q3 2023 and 23% lower than Q3 2019. Visitors from the Rest of the World were 2% lower than Q3 2023 and 37% lower than Q3 2019.
- During Q3 2024, 53,141 visitors travelled to Guernsey for leisure; 5% lower than Q3 2023 and 37% lower than Q3 2019. Visitors travelling to see friends/family totalled 22,179 people, 5% and 12% higher than Q3 2023 and Q3 2019 respectively. Visitors travelling for business purposes totalled 7,099 people; 18% higher than Q3 2023, but 42% lower than Q3 2019.
- The number of visitors staying at least one night but no more than 30 nights was 75,598 people, 2% higher than Q3 2023, but 25% lower than Q3 2019. 13,968 people visited Guernsey on a day trip, 18% lower than Q3 2023 and 36% lower than Q3 2019.
- The average length of stay for those who stayed at least one night but no more than 30 nights in Q3 2024, was 5.4 nights. Visitors spent the equivalent of 408,490 bed nights in Guernsey in Q3 2024, which compares with 403,723 bed nights in Q3 2023 (a 1% increase) and 519,137 bed nights in Q3 2019 (a 21% decrease). 57% of the visitors that stayed overnight stayed in hotels, 25% stayed with friends or relatives and 17% stayed in other visitor accommodation.
- There were 1,916, 1,912 and 1,911 units of visitor accommodation available for booking in July, August and September 2024 respectively. The occupancy of available units was 73% in July, 84% in August and 80% in September 2024. Long-stay guests represented 4 percentage points of the occupancy of open units in September 2024.
- The net promoter score given by visitors leaving by aeroplane or ferry was 54 percentage points. Higher scores (of 61 and 60 percentage points respectively) were given by visitors seeing friends/family and those visiting for leisure than by those visiting for business (27 percentage points).

2.1 Passenger volumes

Figure 2.1.1 Passenger volumes



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

As shown in **Figure 2.1.1**, with the exception of the COVID-19 related travel requirements (which were put in place for people travelling into Guernsey in February 2020 and remained in place throughout 2021 with no non-essential travel allowed between 12th March 2020 and 20th May 2020 or between 14th January 2021 and 22nd March 2021), the quarterly number of passengers is highly seasonal. Higher numbers of departing passengers are typically recorded during Quarter 2 and Quarter 3 each year, whilst lower numbers of passengers are recorded during Quarter 1 and Quarter 4. For this reason, comparisons of passenger volumes are made with the equivalent periods in previous years. Total departing passengers in Q3 2024, as shown in **Table 2.1.1**, was 193,338, 12% lower than Q3 2023 and 26% lower than pre COVID-19 passenger volumes in Q3 2019.

52% of all departing passengers travelled by aeroplane in Q3 2024, 99,957 people, 2% lower than Q3 2023 and 22% lower than Q3 2019. 32% of all passengers travelled by ferry in Q3 2024, 60,978 people, 3% higher than Q3 2023 and 14% lower than Q3 2019.

Table 2.1.1 Passenger volumes

	Q3 2019	Q3 2023	Q3 2024	Annual % change	5 yr % change
Passengers departing Guernsey by aeroplane	128,629	101,890	99,957	-2%	-22%
Passengers departing Guernsey by ferry	70,741	59,238	60,978	3%	-14%
Passengers departing Guernsey by cruise ship and yacht	60,999	58,039	32,403	-44%	-47%
Total departing passengers	260,369	219,167	193,338	-12%	-26%

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.

58% of all passengers departed Guernsey for the UK, totalling 112,800 people in Q3 2024, 2% lower than Q3 2023 and 18% lower than Q3 2019. 11% of all passengers departing Guernsey were travelling to Jersey and totalled 21,637 people in Q3 2024, 9% higher than Q3 2023, but 34% lower than Q3 2019. 14% of passengers departed Guernsey for the rest of the world and totalled 26,498 people in Q3 2024, 3% higher than Q3 2023, but 8% lower than Q3 2019. 17% of passengers departed Guernsey on a cruise or yacht trip in Q3 2024, 32,403 people.

Figure 2.2.1 Passenger volumes by destination

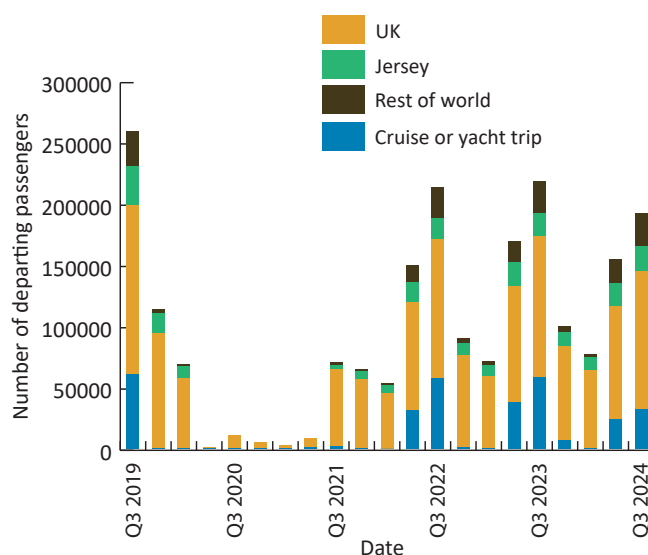
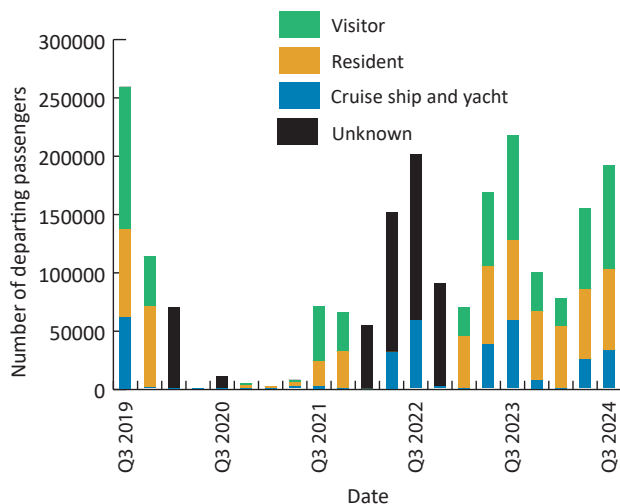


Table 2.2.1 Passenger volumes by destination

	Q3 2019	Q3 2023	Q3 2024	Annual % change	5 yr % change
Passengers departing Guernsey for United Kingdom	137,939	115,540	112,800	-2%	-18%
Passengers departing Guernsey for Jersey	32,721	19,883	21,637	9%	-34%
Passengers departing Guernsey for rest of world	28,710	25,705	26,498	3%	-8%
Passengers departing Guernsey on cruise or yacht trip	60,999	58,039	32,403	-44%	-47%
Total departing passengers	260,369	219,167	193,338	-12%	-26%

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. 9% of departing passengers were surveyed in Q3 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

	Q3 2019	Q3 2023	Q3 2024	Annual % change	5 yr % change
Residents departing Guernsey by aeroplane	60,361	52,269	50,034	-4%	-17%
Residents departing Guernsey by ferry	15,071	16,569	19,601	18%	30%
Visitors departing Guernsey by aeroplane	67,712	49,148	49,312	<1%	-27%
Visitors departing Guernsey by ferry	55,300	42,443	40,963	-3%	-26%
Visitors departing Guernsey by cruise ship and yacht	60,999	58,039	32,403	-44%	-47%
Total departing residents	75,432	68,839	69,635	1%	-8%
Total departing visitors	184,011	149,630	122,678	-18%	-33%
Total visitors returning to Guernsey later	926	698	1,025	47%	11%

2.3 Passenger volumes - visitors and residents

As shown in **Table 2.3.1** and **Figure 2.3.1**, 69,635 passengers, 36% of those departing Guernsey in Q3 2024, were residents, whilst 63% of those departing Guernsey were visitors (122,678 passengers). A small proportion, less than 1%, 1,025 visitors reported that they were returning to Guernsey later. In order to avoid duplication in sampling no further visitor information is collected from those passengers who report they are returning later and they are excluded from any subsequent analysis in this bulletin.

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

Figure 2.3.2 shows the volume of residents travelling by ferry and aeroplane each quarter. In Q3 2024, 72%, 50,034 residents travelled by aeroplane, the remainder, 28%, 19,601 residents travelled by ferry. The number of residents travelling by aeroplane in Q3 2024 was 17% lower than the number travelling by aeroplane in Q3 2019 and 4% lower than the number travelling by aeroplane in Q3 2023. The number of residents travelling by ferry in Q3 2024 was 30% higher than the number travelling by ferry in Q3 2019 and 18% higher than the number travelling by ferry in Q3 2023.

Figure 2.3.3 shows the volume of visitors travelling by ferry, aeroplane, cruise ship/visiting yacht each quarter. In Q3 2024, 40%, 49,312 visitors travelled by aeroplane, 33%, 40,963 visitors travelled by ferry and 26%, 32,403 people travelled by visiting yacht or cruise ship. The number of visitors travelling by aeroplane in Q3 2024 was 27% lower than the number travelling by aeroplane in Q3 2019, but very similar to the number of visitors travelling by aeroplane in Q3 2023. The number of visitors travelling by ferry in Q3 2024 was 26% lower than the number travelling by ferry in Q3 2019, and 3% lower than the number travelling by ferry in Q3 2023.

Figure 2.3.2 Resident passenger volumes

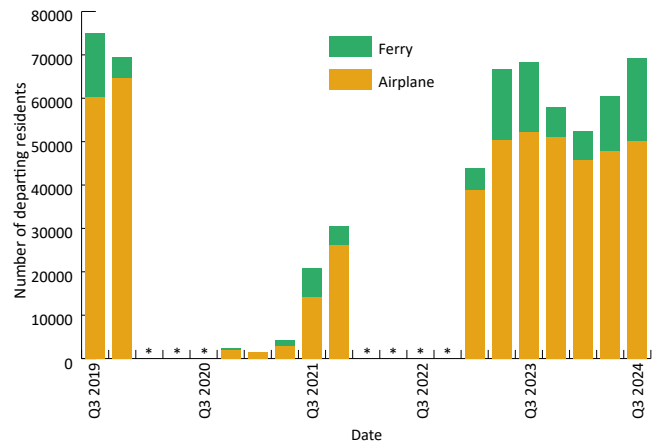
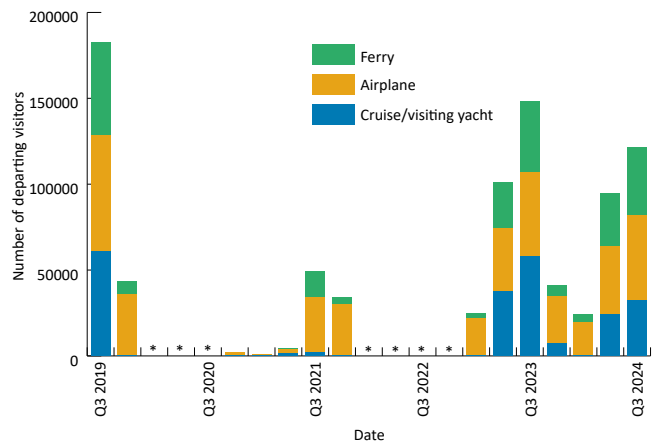


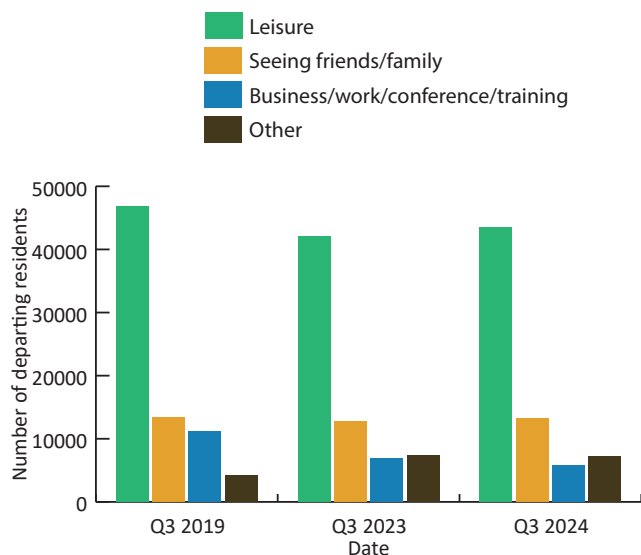
Figure 2.3.3 Visitor passenger volumes



*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 Q3 2024, 63%, 43,550 residents reported the main purpose of their trip away from Guernsey was for leisure, 7% lower than the 46,740 residents who reported they were travelling for leisure in Q3 2019, but 4% higher than the 42,026 residents travelling for leisure purposes in Q3 2023.

19% of all residents, 13,152 people cited they were seeing friends/family, 2% lower than the 13,357 who reported they were travelling to see friends/family in Q3 2019 and 4% higher than the 12,684 residents travelling to see friends/family in Q3 2023.

8%, 5,729 residents were leaving on business (49% lower than the 11,159 residents in Q3 2019 and 16% lower than the 6,828 residents travelling for business in Q3 2023) and 10%, 7,204 were leaving for other reasons (4,176 in Q3 2019). Other reasons include residents travelling for medical/hospital purposes, residents participating in sport and residents on a school trip/visit.

Table 3.1.1 Residents - main purpose of trip away from Guernsey

	Q3 2019	Q3 2023	Q3 2024	Annual % change	5 yr % change
Leisure (e.g. holiday/vacation/break)	46,740	42,026	43,550	4%	-7%
Seeing friends/family (including weddings, funerals etc)	13,357	12,684	13,152	4%	-2%
Business/work/conference/training	11,159	6,828	5,729	-16%	-49%
Other	4,176	7,300	7,204	-1%	73%
Total	75,432	68,839	69,635	1%	-8%

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, 69% of residents, 47,770 people were travelling to the UK in Q3 2024, (in Q3 2023 the equivalent figure was 71% of residents and 48,761 people).

13% of residents travelled to Jersey, 8,757 people. For Q3 2023 this was 11% of residents and 7,587 people. The number of residents travelling to Jersey during Q3 2024 was 41% lower than for Q3 2019, but 15% higher than Q3 2023. 19% of residents, 13,108 people travelled elsewhere during Q3 2024 (18%, 12,491 residents travelled elsewhere in Q3 2023), 153% higher than Q3 2019 and 5% higher than Q3 2023.

63% of all those surveyed during Q3 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; 43% said their final destination was nearby.

Day trips accounted for 8% of all resident's trips during Q3 2024, the same as in Q3 2023. The average length of trip by residents during Q3 2024 was 7.0 nights, and compares with 7.1 nights during Q3 2023.

Figure 3.2.1 Residents - destination port Q3 2023

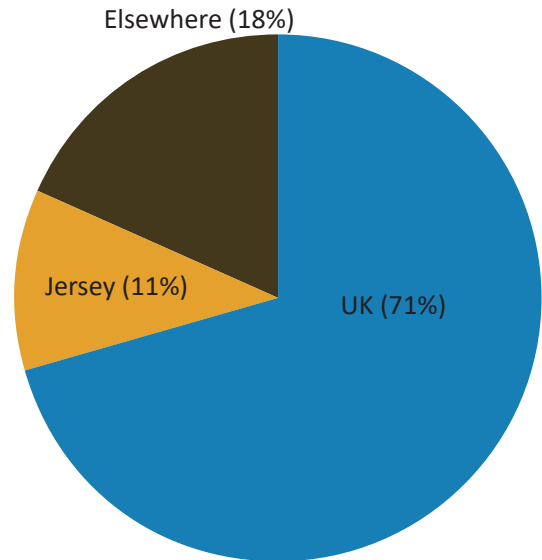


Figure 3.2.2 Residents - destination port Q3 2024

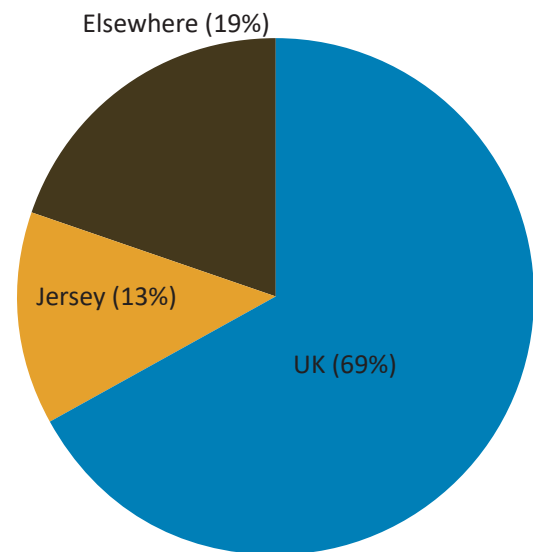


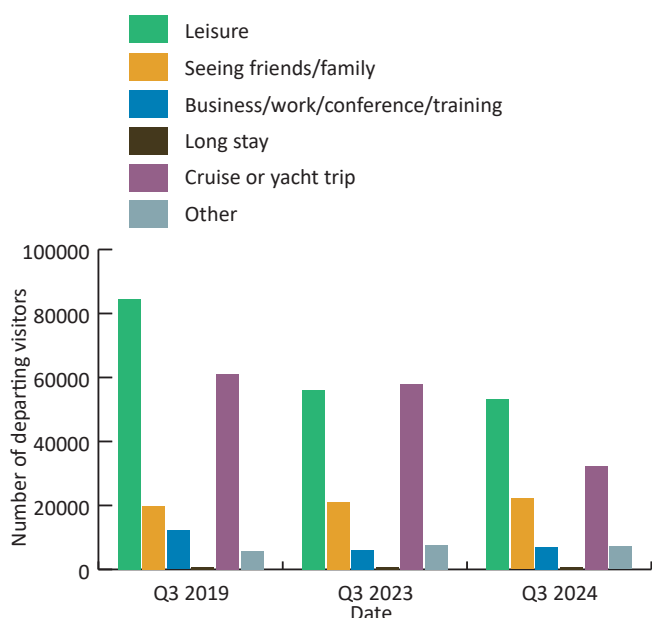
Table 3.2.1 Residents - destination port

	Q3 2019	Q3 2023	Q3 2024	Annual % change	5 yr % change
United Kingdom	55,503	48,761	47,770	-2%	-14%
Jersey	14,747	7,587	8,757	15%	-41%
Rest of world	5,182	12,491	13,108	5%	153%
Total	75,432	68,839	69,635	1%	-8%

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 Q3 2024, 53,141 visitors reported the main purpose of their trip to Guernsey was for leisure (84,555 in Q3 2019 and 56,072 in Q3 2023). 22,179 visitors cited they were seeing friends/family (19,795 in Q3 2019 and 21,181 in Q3 2023). 7,099 visitors were here for business, which compares with 12,178 in Q3 2019, 42% lower, and 6,009 business visitors in Q3 2023, 18% higher. 7,147 visitors were here for other reasons during Q3 2024. 695 or 10% of those visitors who cited other reasons mentioned sport, be it as a participant or spectator (representing 1% of all visitors in Q3 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.

32,403 people visited by yacht or cruise ship during Q3 2024, 44% lower than Q3 2023 and 47% lower than Q3 2019. 709 visitors during Q3 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. 58% of all visitors to Guernsey during Q3 2024 said they had visited Guernsey before, 3% of whom had visited Guernsey on a cruise.

Table 4.1.1 Visitors - main purpose of trip to Guernsey

	Q3 2019	Q3 2023	Q3 2024	Annual % change	5 yr % change
Leisure (e.g. holiday/vacation/break)	84,555	56,072	53,141	-5%	-37%
Seeing friends/family (including weddings, funerals etc)	19,795	21,181	22,179	5%	12%
Business/work/conference/training	12,178	6,009	7,099	18%	-42%
Long stay (more than 30 nights but less than 1 year for work/other purpose)	738	649	709	9%	-4%
Cruise or yacht trip	60,999	58,039	32,403	-44%	-47%
Other	5,746	7,680	7,147	-7%	24%
Total	184,011	149,630	122,678	-18%	-33%

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 Q3 2024, 52% of all visitors, 63,853 people reported their country of residence was the UK (43%, 63,885 in Q3 2023). 4%, 4,795 visitors were from Jersey (4%, 5,968 in Q3 2023). 7%, 8,228 visitors were from France (5%, 8,025 in Q3 2023), 11%, 13,399 visitors were from the Rest of the world (9%, 13,713 in Q3 2023), and 26%, 32,403 visitors' country of residence was unknown, as they were visiting by cruise ship or yacht (39%, 58,039 in Q3 2023).

As shown in **Table 4.2.1**, in Q3 2024 the number of visitors whose country of residence was the UK was broadly unchanged compared to Q3 2023, but 20% fewer than Q3 2019. In Q3 2024 there were 20% fewer visitors whose country of residence was Jersey compared with Q3 2023 and 23% fewer than Q3 2019. In Q3 2024 there were 3% more visitors whose country of residence was France compared with Q3 2023, but 48% fewer than Q3 2019. There were 2% fewer visitors whose country of residence was Rest of the world compared with Q3 2023 and 37% fewer than Q3 2019.

Table 4.2.1 Visitors - country of residence

	Q3 2019	Q3 2023	Q3 2024	Annual % change	5 yr % change
United Kingdom	79,798	63,885	63,853	>-1%	-20%
Jersey	6,201	5,968	4,795	-20%	-23%
France	15,838	8,025	8,228	3%	-48%
Rest of world	21,175	13,713	13,399	-2%	-37%
Unknown (cruise ship and yacht passengers)	60,999	58,039	32,403	-44%	-47%
Total	184,011	149,630	122,678	-18%	-33%

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

Figure 4.2.1 Visitors - country of residence Q3 2023

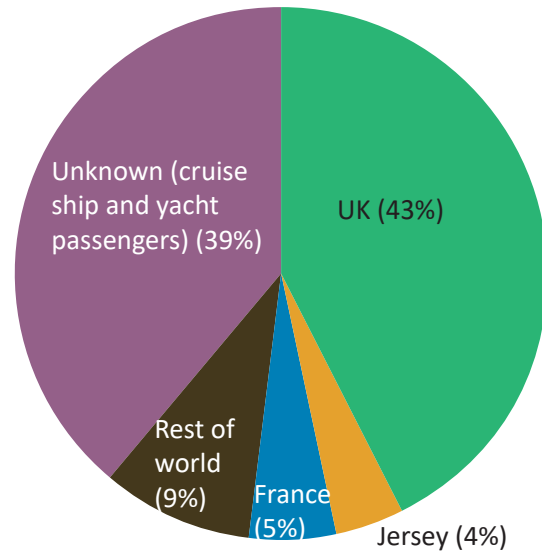
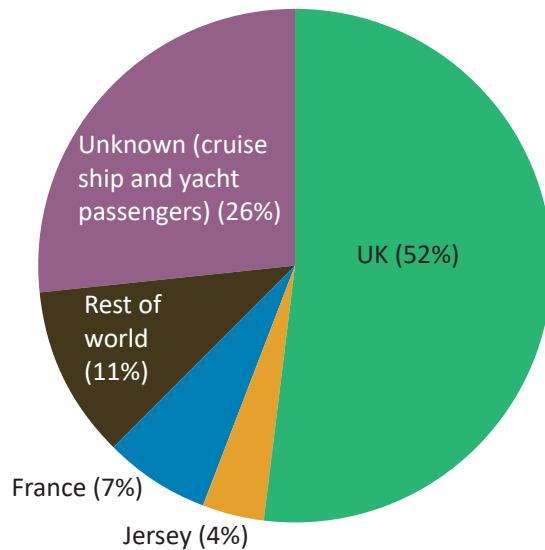


Figure 4.2.2 Visitors - country of residence Q3 2024



4.3 Visitors - length of stay in Guernsey

Figure 4.3.1 Visitors - length of stay in Guernsey Q3 2023

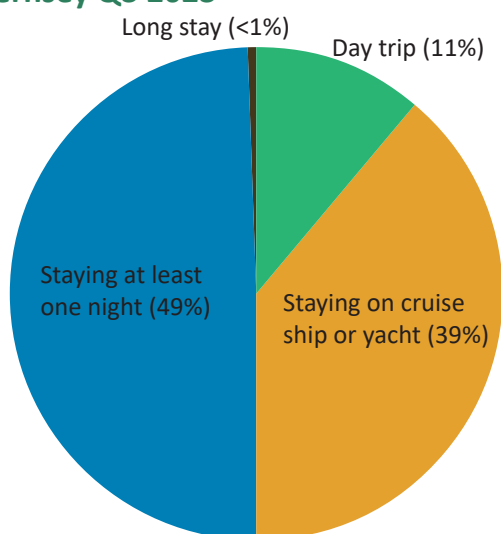
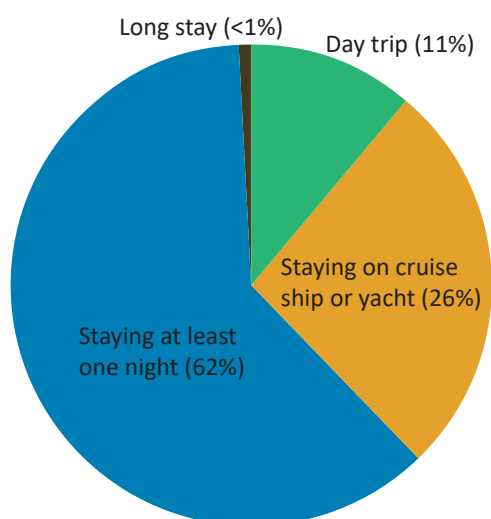


Figure 4.3.2 Visitors - length of stay in Guernsey Q3 2024



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 Q3 2024, 13,968 people visited Guernsey on a day trip, representing 11% of all visitors (16,998 people, 11% in Q3 2023). The majority, 62% of visitors, 75,598 people, stayed at least one night but less than 31 nights (73,944 people, 49% in Q3 2023). During Q3 2024, less than 1% of visitors were long stay visitors (709 people).

Comparison between Q3 2024, Q3 2023 and Q3 2019 reveals that in Q3 2024 there were 36% fewer visitors on a day trip compared with Q3 2019 and 18% fewer visitors on a day trip compared with Q3 2023. 25% fewer visitors stayed at least one night (but less than 31 nights) compared with Q3 2019, but 2% more than Q3 2023.

Table 4.3.1 Visitors - length of stay in Guernsey

	Q3 2019	Q3 2023	Q3 2024	Annual % change	5 yr % change
Day trip to Guernsey	21,768	16,998	13,968	-18%	-36%
Staying on a cruise ship or yacht	60,999	58,039	32,403	-44%	-47%
Staying at least one night in Guernsey (but 30 or less nights)	100,506	73,944	75,598	2%	-25%
Long stay (more than 30 nights but less than 1 year)	738	649	709	9%	-4%
Total	184,011	149,630	122,678	-18%	-33%

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

4.3 Visitors - length of stay in Guernsey

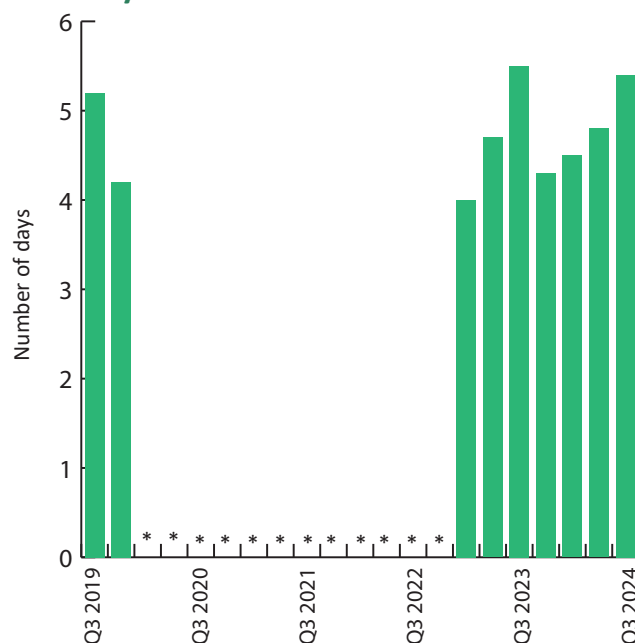
As shown in **Figure 4.3.3** visitor length of stay varies by quarter and displays some seasonality. There is a tendency for visitors to stay longer during Quarter 2 and Quarter 3 each year (in Q3 2019 the average length of stay for visitors was 5.2 nights) whilst visitors during Quarter 1 and Quarter 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 5.4 nights in Q3 2024 and compares with 5.5 nights in Q3 2023, and 5.2 nights in Q3 2019. The slight decrease in average length of stay between Q3 2023 and Q3 2024 is due to a decrease in the length of stay for those visitors who travelled by ferry (5.7 nights in Q3 2023, compared with 5.1 nights in Q3 2024). That said, this decrease in length of stay was partially offset by an increase in the length of stay by visitors who travelled by aeroplane (5.4 nights in Q3 2023 compared with 5.5 nights in Q3 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.

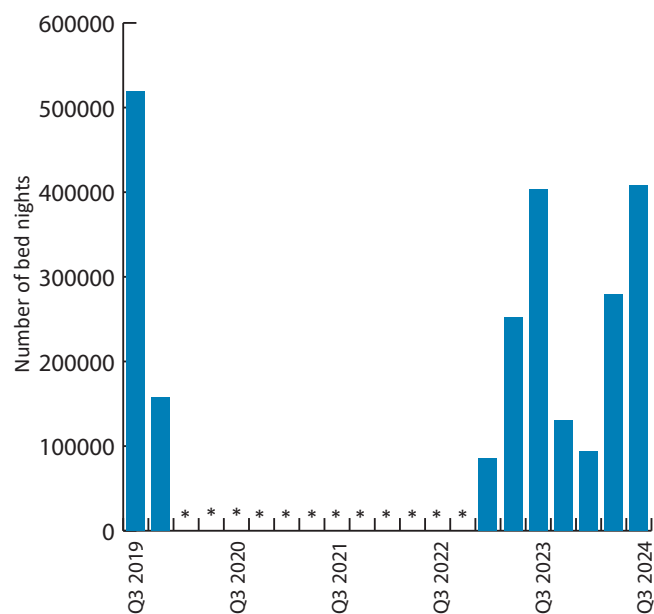
During Q3 2024, visitors spent the equivalent of 408,490 bed nights in Guernsey which compares with 403,723 bed nights in Q3 2023 (a 1% increase) and 519,137 bed nights in Q3 2019 (a 21% decrease).

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.

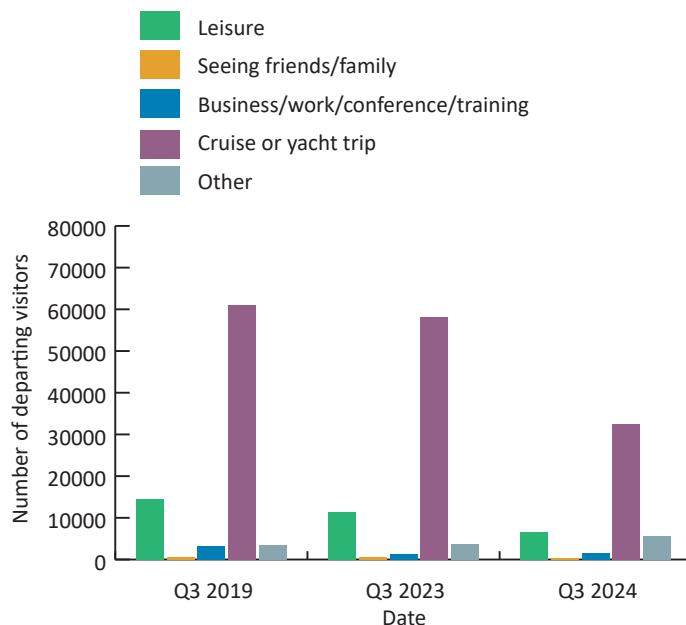
During Q3 2024, 14% of all visitors on a day trip to Guernsey, 6,476 people, reported the main purpose of their trip to Guernsey was for leisure (55% lower than the 14,495 people who reported their day trip was for leisure purposes in Q3 2019 and 43% fewer than the 11,399 who reported their day trip was for leisure in Q3 2023). 417 visitors who visited Guernsey on a day trip, 1% of day trippers, cited they were seeing friends/family (543 in Q3 2019 and 687 in Q3 2023), 1,461 were here for business, 3% of all day trip visitors, (3,261 in Q3 2019 and 1,272 in Q3 2023) and 5,613 day trip visitors (12%) were here for other reasons (3,469 in Q3 2019 and 3,640 in Q3 2023).

Comparison between Q3 2024, Q3 2023 and Q3 2019 reveals that in Q3 2024 there were 55% fewer day trippers visiting for leisure purposes than Q3 2019 and 43% fewer than Q3 2023. 23% fewer day visitors seeing friends/family than Q3 2019 and 39% fewer than Q3 2023. In Q3 2024 there were 55% fewer day visitors who travelled for business/work compared with Q3 2019, but 15% more than Q3 2023.

Table 4.4.1 Main purpose of trip of day trip visitors

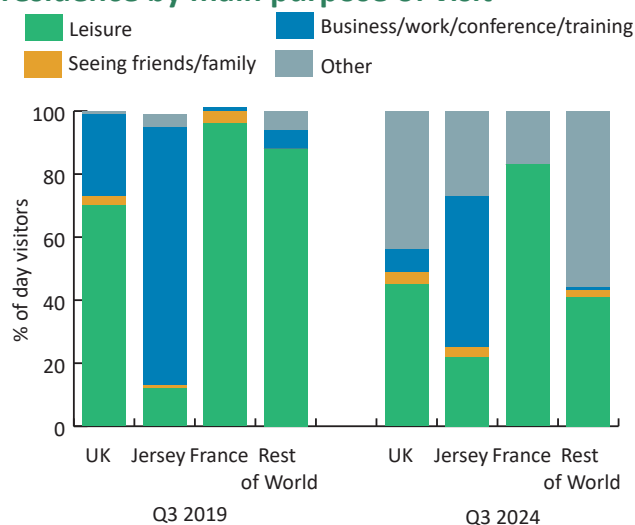
	Q3 2019	Q3 2023	Q3 2024	Annual % change	5 yr % change
Leisure (e.g. holiday/vacation/break)	14,495	11,399	6,476	-43%	-55%
Seeing friends/family (including weddings, funerals etc)	543	687	417	-39%	-23%
Business/work/conference/training	3,261	1,272	1,461	15%	-55%
Cruise or yacht trip	60,999	58,039	32,403	-44%	-47%
Other	3,469	3,640	5,613	54%	62%
Total	82,767	75,037	46,371	-38%	-44%

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 Q3 2024, 45% of day trip visitors from the UK reported the main purpose of their day trip to Guernsey was for leisure, compared with 70% in Q3 2019. 7% of day trip visitors from the UK were here for business purposes, compared with 26% in Q3 2019, and 44% of day trip visitors from the UK were in Guernsey for other reasons.

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

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

The principal reason for day trip visits in Q3 2024 from those whose country of residence is Jersey was business, 47%; this compares with 82% in Q3 2019. 22% of day trip visitors whose country of residence is Jersey visited for leisure purposes in Q3 2024, which compares with 12% in Q3 2019.

Visitors from France were most likely to report in Q3 2024 that their main purpose of visit was leisure; 83%. This compares with 96% in Q3 2019.

41% of day trip visitors to Guernsey during Q3 2024 whose country of residence was the Rest of the world reported they were in Guernsey for leisure, compared with 88% in Q3 2019. 56% of day trip visitors from the Rest of the world were in Guernsey for other purposes during Q3 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.

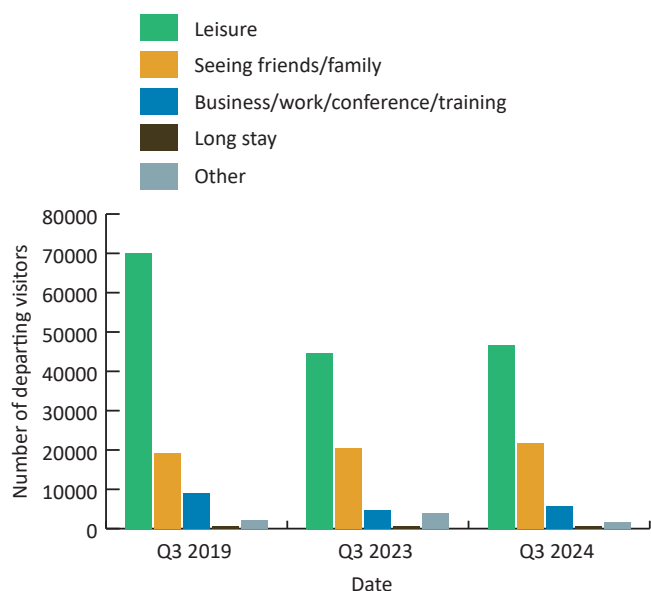
Table 4.4.3 Q3 2024 Day trip visitors - country of residence by main purpose of visit

	UK (%)	Jersey (%)	France (%)	Rest of World (%)
Leisure (e.g. holiday/vacation/break)	45	22	83	41
Seeing friends/family (including weddings, funerals etc)	4	3	0	2
Business/work/conference/training	7	47	0	1
Other	44	27	17	56
Total	100	100	100	100

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

4.5 Visitors - main purpose of visit of staying visitors

Figure 4.5.1 Main purpose of trip of staying visitors



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 Q3 2024, 61% or 46,665 of all staying visitors reported the main purpose of their trip to Guernsey was for leisure (70,060 in Q3 2019 and 44,673 in Q3 2023). 29% or 21,762 of staying visitors cited they were seeing friends/family (compared with 19,252 who reported they were seeing friends/family in Q3 2019 and 20,495 in Q3 2023). 7%, 5,638 were here for business or work reasons (8,917 in Q3 2019 and 4,737 in Q3 2023) and 2%, 1,534 were here for other reasons (2,277 in Q3 2019 and 4,040 in Q3 2023). Less than 1% or 709 visitors were long stay visitors, having stayed more than 30 nights but less than 1 year, in Q3 2024 (738 visitors in Q3 2019 and 649 in Q3 2023).

Comparison between Q3 2024, Q3 2023 and Q3 2019 reveals that in Q3 2024 there were 33% fewer staying visitors visiting for leisure purposes compared to Q3 2019, but 4% more than Q3 2023. The number of visitors seeing friends/family in Q3 2024 was 13% higher than Q3 2019 and 6% higher than Q3 2023. In Q3 2024 37% fewer staying visitors travelled for business/work compared with Q3 2019, but 19% more travelled for business/work compared with Q3 2023.

Table 4.5.1 Main purpose of trip of staying visitors

	Q3 2019	Q3 2023	Q3 2024	Annual % change	5 yr % change
Leisure (e.g. holiday/vacation/break)	70,060	44,673	46,665	4%	-33%
Seeing friends/family (including weddings, funerals etc)	19,252	20,495	21,762	6%	13%
Business/work/conference/training	8,917	4,737	5,638	19%	-37%
Long stay (more than 30 nights but less than 1 year)	738	649	709	9%	-4%
Other	2,277	4,040	1,534	-62%	-33%
Total	101,244	74,594	76,307	2%	-25%

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

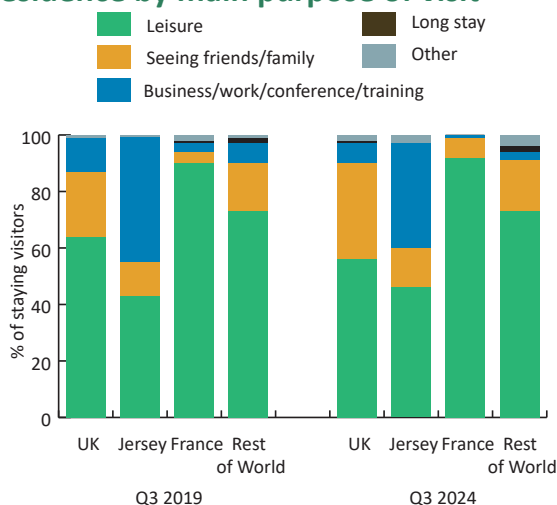


Table 4.5.2 Q3 2019 Staying visitors - country of residence by main purpose of visit

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

Table 4.5.3 Q3 2024 Staying visitors - country of residence by main purpose of visit

	UK (%)	Jersey (%)	France (%)	Rest of World (%)
Leisure (e.g. holiday/vacation/break)	56	46	92	72
Seeing friends/family (including weddings, funerals etc)	34	14	7	18
Business/work/conference/training	7	37	1	3
Long stay	<1	0	0	2
Other	2	4	0	4
Total	100	100	100	100

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

In Q3 2024, 56% of staying visitors from the UK reported the main purpose of their trip to Guernsey was for leisure, compared with 64% in Q3 2019. 34% of staying visitors from the UK were seeing friends/family, compared to 23% in Q3 2019, and 7% of staying visitors from the UK were in Guernsey for business/work reasons.

The principal reasons for staying visits in Q3 2024 from those with country of residence of Jersey were leisure and business; 46% and 37% respectively. This compares with 43% and 44% in Q3 2019. 4% 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.

Visitors from France were most likely to report in Q3 2024 that their main purpose of visit was for leisure, 92%. This compares with 90% of staying visitors from France in Q3 2019. 7% whose country of residence was France reported they were visiting to see friends/family in Q3 2024. 1% cited they were in Guernsey for business purposes.

In Q3 2024, 72% of staying visitors whose country of residence was the Rest of the world reported they were visiting Guernsey for leisure purposes and a further 18% were in Guernsey to see friends/family. 3% of staying visitors whose country of residence was the Rest of the world reported they were staying in Guernsey for business reasons and 2% 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 Q3 2024, 57% of all visitors staying in Guernsey stayed in hotels, (43,347 people), 17% stayed in other accommodation (13,063 people) and 25% stayed with friends/family (19,189 people). The other category includes guest houses, any accommodation listed on Airbnb or other online booking portals, self-catering units and campsites etc.

Comparison between Q3 2024, Q3 2023 and Q3 2019 reveals that in Q3 2024 there were 29% fewer visitors staying in hotels than Q3 2019 and 4% fewer visitors staying in hotels than Q3 2023. 38% fewer visitors stayed in Other accommodation in Q3 2024 compared with Q3 2019, but 9% more than Q3 2023. In Q3 2024 there were 3% more visitors staying in friend/family's homes than Q3 2019 and 13% more than Q3 2023.

Figure 4.6.1 Accommodation for staying visitors Q3 2023

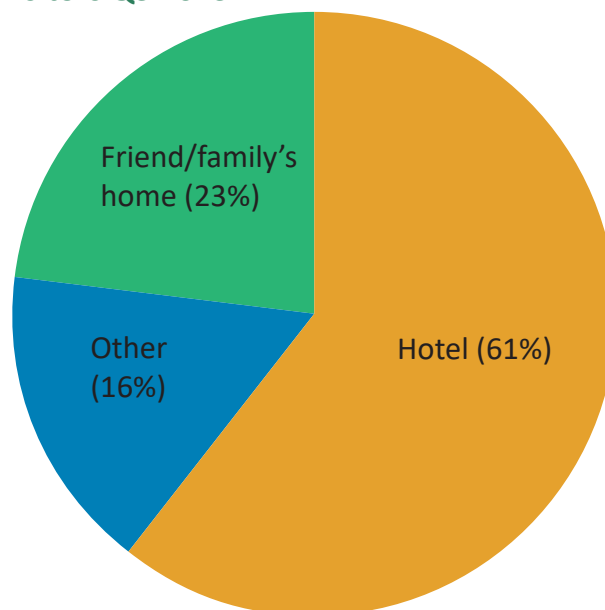


Figure 4.6.2 Accommodation for staying visitors Q3 2024

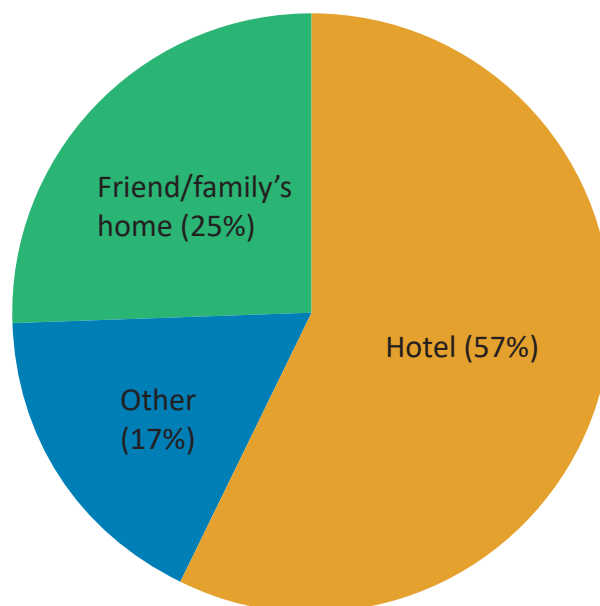


Table 4.6.1 Accommodation for staying visitors

	Q3 2019	Q3 2023	Q3 2024	Annual % change	5 yr % change
Hotel	60,909	44,927	43,347	-4%	-29%
Other (including guest houses, accommodation listed on Airbnb or other online booking portals, self-catering units and campsites etc)	21,006	12,039	13,063	9%	-38%
Commercial accommodation (includes hotel, guest houses, self-catering, Airbnb or other online booking portals and campsites etc)	81,915	56,966	56,409	-1%	-31%
Friend/family's home	18,591	16,979	19,189	13%	3%
Total staying visitors	100,506	73,944	75,598	2%	-25%

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.

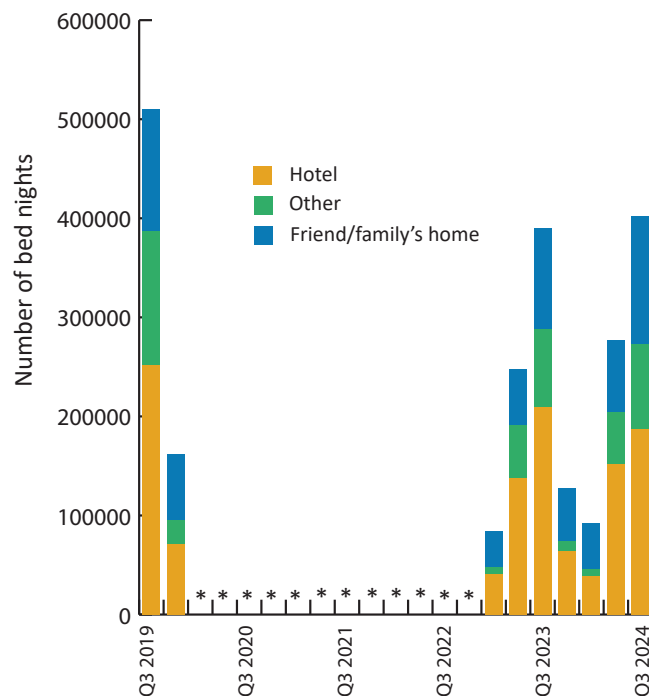
On average visitors in hotels stayed 4.3 nights in Q3 2024, which equates to 187,722 bed nights (4.1 nights in Q3 2019 and 4.7 nights in Q3 2023). The average length of stay in other accommodation (which includes guest houses, any accommodation listed on Airbnb or other online booking portals, self-catering units and campsites etc) was 6.5 nights (equating to 85,504 bed nights). The average stay in commercial accommodation in Q3 2024 which includes both Hotels and other accommodation was 4.8 nights, equating to 273,226 bed nights, which is a shorter duration and 5% fewer bed nights than reported in Q3 2023.

During Q3 2024 the average length of stay with friends/family was 6.7 nights, equating to 129,351 bed nights (6.6 nights in Q3 2019, 123,423 bed nights and 6.0 nights in Q3 2023, 101,465 bed nights).

Table 4.6.2 Length of stay by accommodation

	Q3 2019 (nights)	Q3 2023 (nights)	Q3 2024 (nights)	Annual % change	5 yr % change
Hotel	4.1	4.7	4.3	-7%	5%
Other (including guest houses, accommodation listed on Airbnb or other online booking portals, self-catering units and campsites etc)	6.8	6.6	6.5	>-1%	-4%
Average stay in commercial accommodation (includes hotel, guest houses, self-catering, Airbnb or other online booking portals and campsites etc)	4.8	5.1	4.8	-4%	<1%
Friend/family's home	6.6	6.0	6.7	13%	2%

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.

5.1 Visitor accommodation - capacity

Figure 5.1.1 Visitor accommodation capacity

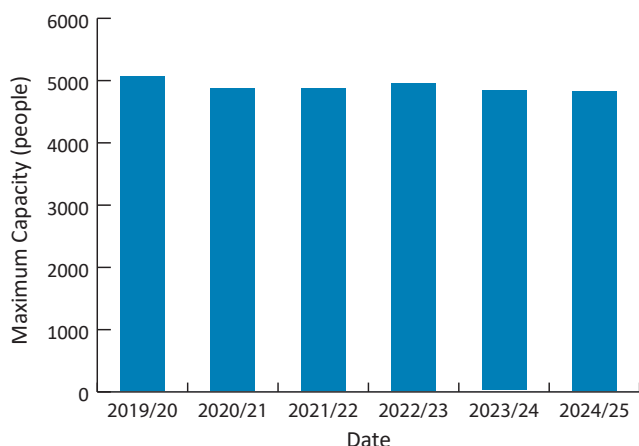


Table 5.1.1 Visitor accommodation capacity

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

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

Table 5.1.2 Additional summer capacity

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

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

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

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

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

5.1 Visitor accommodation - availability

Each month, visitor accommodation providers with active permits are asked to provide data on the availability and occupancy of their accommodation units. The responses received in July, August and September 2024 include different accommodation types and sizes and statistics for these months are accurate to at least plus or minus 2% (at a confidence level of 95%). The responses are scaled up by the total amount of visitor accommodation (with both an active boarding permit and an aligned building use type) in order to give figures for the whole Island. 2023/24 boarding permit information was used to scale up the figures for the second, third and fourth quarters of 2023 and first quarter of 2024. 2024/25 boarding permit information was used to scale up the figures for the second and third quarters of 2024.

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

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

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

This information is only available from 2022 onwards, following changes to the way data is collected from accommodation providers.

Table 5.1.3 and **Figure 5.1.3** show that there were 1,917 visitor accommodation units in Q3 2024. During Q3 2024 there were very few visitor accommodation closures. The proportion of visitor accommodation units available to be booked was 99.9%, 99.7% and 99.7% in July, August and September 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
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
Jul 2024	1,916	1	1,917
Aug 2024	1,912	5	1,917
Sep 2024	1,911	6	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

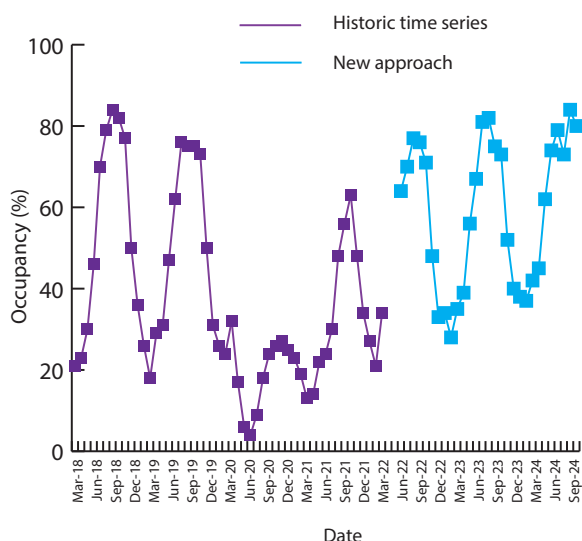


Table 5.2.1 Occupancy of open/available accommodation units

	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%	73%
August	75%	24%	56%	76%	75%	84%
September	73%	26%	63%	71%	73%	80%
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 increased from a low of 37% in January 2024 to a peak of 84% in August 2024. Specifically during Q3 2024 an occupancy of 73% was recorded in July 2024, 84% in August 2024 and 80% in September 2024, which compares with occupancy of 82% in July 2023, 75% in August 2023 and 73% in September 2023.

Additional information began being collected in June 2023, which makes it possible to determine that 7% of open units in July 2024 were occupied by long-stay guests. In both August and September 2024 5% of open units were occupied by long-stay guests. This means that long-stay guests represented 4 percentage points of the 80% occupancy of open units in September 2024.

6.1 Net promoter score

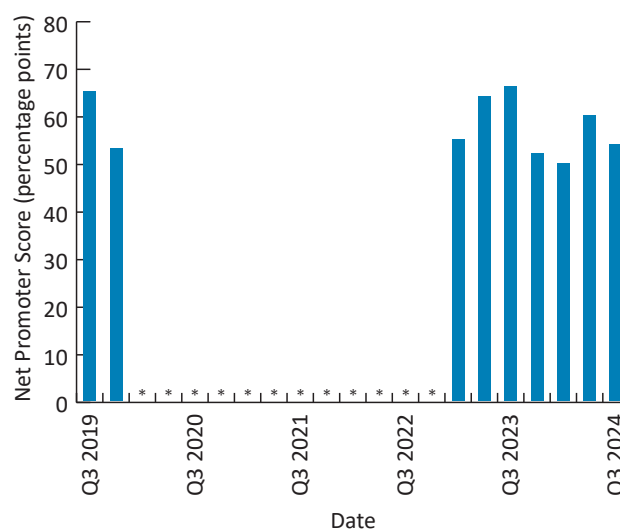
Visitors leaving the Island by aeroplane or ferry are asked how likely they would be to recommend Guernsey to a friend or relative (as a score out of 10, with 10 meaning very likely) as part of the exit survey. Prior to 2020 net promoter scores did not include visitors whose country of residence was 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 (NPS) is calculated by deducting the percentage of visitors surveyed that gave a score of six or less out of ten from the percentage of visitors surveyed that gave a score of ten or nine out of ten. As shown in **Table 6.1.1** and **Figure 6.1.1** the net promoter score for Q3 2024 was 54 percentage points compared with 66 percentage points in Q3 2023 and 65 percentage points in Q3 2019. The reduction in the NPS between Q3 2023 and Q3 2024 can be attributed to a lower proportion of visitors who gave a score of ten or nine out of ten.

Respondents may choose to provide comments or feedback after providing their net promoter score. Analysis of these comments reveals that during Q3 2024 the highest number of comments received were in relation to travel delays, accounting for 18% of all comments; a higher proportion than for the same period in Q3 2023 (4%). 12% of all comments referred to high costs (of travel, accommodation and/or eating out). 7% of all comments suggested they had not seen much during their visit (either on a day trip or visiting for business). 6% of all comments provided positive feedback on the attractions they had visited including: Hauteville House, La Vallette Bathing Pools, Castle Cornet and the Little Chapel.

By main purpose of visit, those seeing friends/family had the highest net promoter score (61 percentage points) in Q3 2024, followed by leisure visitors, 60 percentage points. Those visiting on business had the lowest net promoter score, 27 percentage points, with many business travellers commenting that they haven't seen much during their visit.

Figure 6.1.1 Net promoter score



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

Table 6.1.1 Net promoter score

	Q3 2019	Q3 2023	Q3 2024
Net Promoter Score (percentage points)	65	66	54

7.1 Methodology

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

In Q3 2024, 7,479 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 15,093 passengers, which is 9% of the total number of passengers departing Guernsey during Q3 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 7,479 interviews conducted and it was found that 56% 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 55% to 57%. As the sample sizes decrease (for individual routes, purposes of visit and types of accommodation for example), so the margin of error increases.

Each month, visitor accommodation providers with active permits are also asked to provide data on the availability and occupancy of their accommodation units. The responses received in July, August and September 2024 include various different accommodation types and sizes and statistics for these months are accurate to within at least plus or minus 2% (at a confidence level of 95%). The responses are scaled up by the total amount of visitor accommodation (with both an active boarding permit and an aligned building use type) in order to give figures for the whole Island.

7.2 Contact details

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

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