

Tourism trends quarterly bulletin
Visitor Statistics for Winter: January to pre Easter 2009 (Q1)

Introduction

This bulletin provides the key findings of the tourism monitor for the period January 1st to March 29th 2009. This is the quietest trading period for tourism and some attractions and accommodation providers close for part of this time.

The findings in this bulletin are based upon research conducted on board the six ferry routes to the Island. Medina Valley Centre and Isle of Wight Council supply additional data.

Trend data since 2002 is included. The variations in the timing of Easter each year result in analysis periods of differing length hence the trend data is based on average numbers of visitors per week through the period to enable meaningful comparisons to be made. Easter was later than last year, falling April 10th – 13th. (For comparison, Easter 2008 was March 21st – 24th; 2007 was April 6th – 9th. It should be noted that there was unusually severe weather in February this year; much of the country ground to a halt for a few days, affecting many people's travel plans and this therefore had a negative impact on tourism across the UK.

Looking first at international travel, during January to March, visits to the UK* made by overseas residents decreased by 12% versus 2008 to reach 7.5 million visits. Visits from all over were adversely affected but visits from North America were down the most at -21%; visits from Europe were down by 11% and other countries by -17%. Trips abroad by UK residents decreased by 14%, taking these down to 15million trips.

Domestic travel data is available for January and February only and this shows a similarly gloomy situation: overnight trips across the UK were down by 13%.

Total travel across the Solent (combining travel by residents and visitors) has remained fairly constant across the last 3 years but the mix of residents and visitors travelling has altered. Travel by residents has been decreasing over recent years, down by 7% versus last year and by 14% since winter 2006. Alongside this, travel by visitors has been increasing, up by 7% versus winter 2008 and by 16% versus 2007.

Looking in more detail at these visitors, the profile of visitors coming to the Island has changed as the numbers have increased:

- Short breaks (domestic visits lasting 1 - 4 nights): there were an estimated 70,000 short breaks which is down by 6% vs. 2008 but up by 15% on 2007.
- Total domestic staying visits to the Island reached 154,000, (average of 12,300 per week) which is similar to last year (-2%). Business visits increased and visits to friends/relatives were static.
- Day visitors: there were 185,000, the vast majority of whom were domestic visitors (98%). Domestic day visitors increased by 14% on last year due to increased numbers of leisure day visits, up by a third, and an increase in business visitors (+11%).
- Over a fifth of leisure visitors went to an attraction (23%), a similar proportion to last year.
- Almost 60% of visitors travelled by car to the Island, up by 7points versus last year, travel on foot remained fairly steady but coach share of travel was down significantly to 4%.
- There were 207,000 visits to Islandbreaks.co.uk during January to March, level with winter 2007. Unique visitors to the site increased by 11% to 142,000.

- The value of tourism this quarter is estimated at £41 million; this is a small increase of 2% in the weekly average value versus winter 2008, which was itself up significantly on 2007, and is attributable to the increase in day visits. The value of domestic staying visits is estimated to be down by 3% but this compares with an 11% decline in the value of UK domestic staying visits.

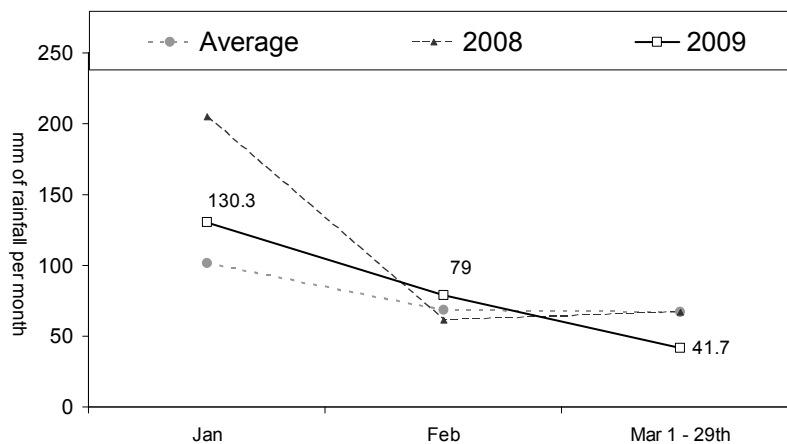
*International Passenger Survey data (seasonally adjusted figures to allow comparisons between the years)

Weather

For most of this winter period, the weather was fairly typical for the time of year. In line with much of the UK, the Island saw some snow at the end of January and early February although February was also warm and sunny.

January 2009 was much improved on last year with rainfall just a little above the average for the time of year. February rainfall was in line with the average but did include some snow; in March it was much drier than usual (34% below average rainfall).

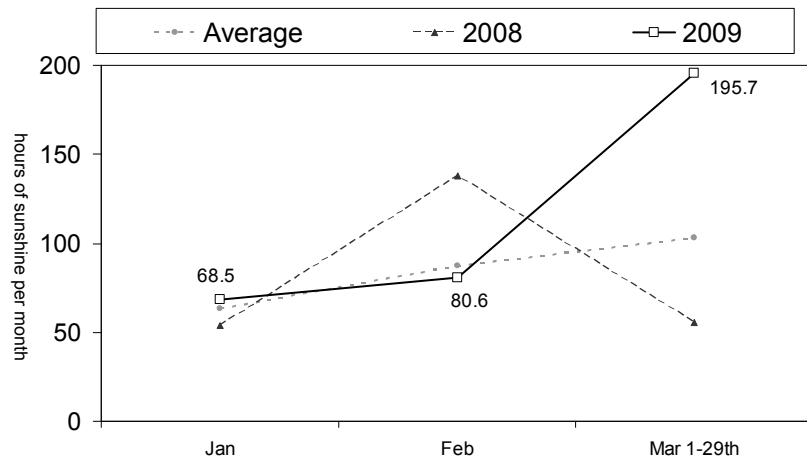
**Rainfall on the Isle of Wight
Q1, 2009 vs. 2008 and long term average**



March 2008 was 1st to 16th

January experienced average hours of sunshine; February was also in line with the norm for this time of year, but well below last February. However, March was extremely sunny, the sunniest in 27 years, and had 65% above the average number of sunshine hours.

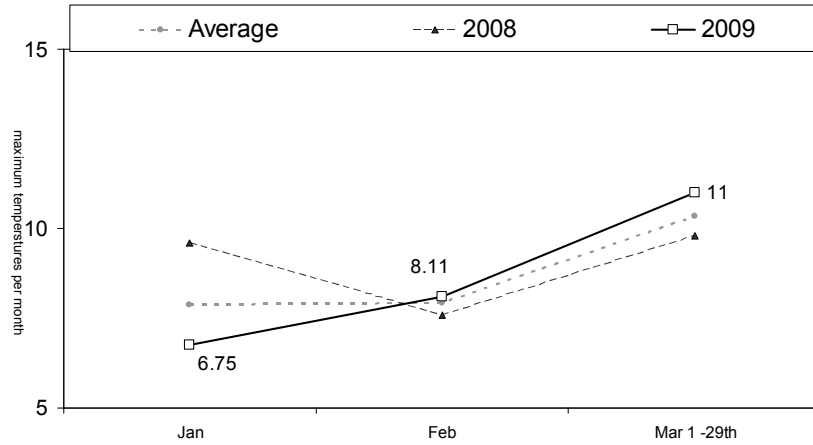
Sunshine on the Isle of Wight Q1, 2009 vs. 2008 and long term average



March 2007 was 1st to 16th

Maximum temperatures hovered around the average: January was a little colder, February temperatures were in line with the average, despite the cold weather experienced at the start of the month, and March was slightly warmer than expected.

Maximum temperatures on the Isle of Wight
Q1, 2009 vs. 2008 and long term average

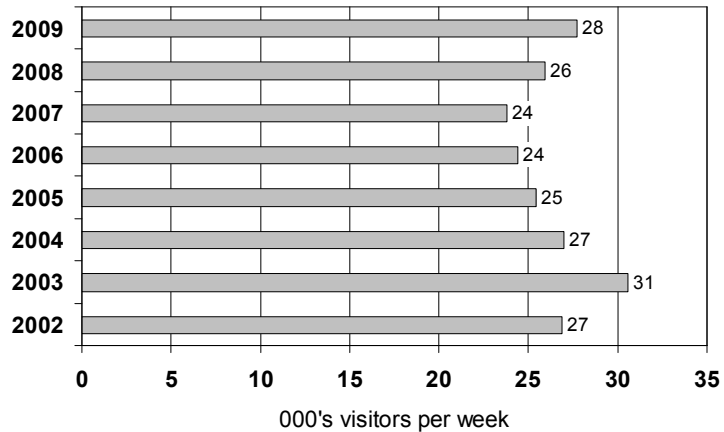


March 2008 was 1st to 16th

Estimated number of visitors to the Isle of Wight

It is estimated that almost 350,000 visits were made to the Isle of Wight during the winter period in 2009. This is approximately 28,000 per week which is up slightly on the same period last year (+7%) and up on the previous four years (+16% vs. 2007).

Estimated number of total visitors
Q1 2009 vs. previous years
Average visitors per week

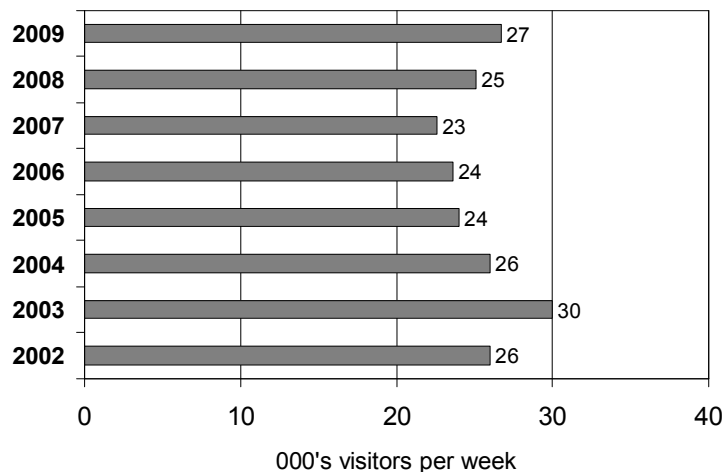


The vast majority of these were domestic visitors, 97%, which is the norm at this time of year.

Estimated number of domestic visitors

336,000 domestic visitors went to the Isle of Wight during the winter. The high proportion of domestic visitors vs. overseas residents means that year on year trends are similar to total visitors, as above. Domestic visitors are now at their highest level since the last peak seen in 2003.

Estimated number of domestic visitors
Q1 2009 vs. previous years
Average visitors per week



Domestic visitors can be divided into staying and day visitors, as shown in the table below.

Over time the balance between staying and day visitors has fluctuated: last year these were equal but this winter the proportion of domestic visitors who were staying declined and there were more day visitors. This does have a negative impact on tourism spend - see page 13.

	Staying visitors %	Day visitors %
2009	46%	54%
2008	50%	50%
2007	46%	54%
2006	53%	47%

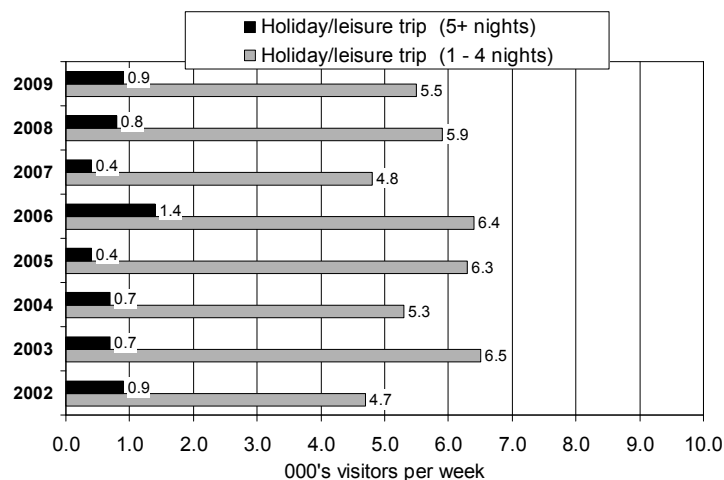
Estimated number of domestic leisure short break and holiday visitors

At this time of year, almost a quarter of domestic visitors to the Island were on a short break or holiday, this means there were over 80,000 such visitors. The vast majority were visitors taking a short break of 1 – 4 nights (almost 70,000); only a small number were on a holiday of 5+ nights (11,000).

Taking the average number of trips per week, to allow comparison over time, there were 5,500 short breaks a week, this is down by 6% on last year but up by 15% on 2007. There were approximately 900 holidays of 5+ nights per week, a slight increase on last year and up significantly on 2007.

Estimated number of domestic short break and holiday leisure visitors Q1 2009 vs. previous years

Average visitors per week



Other domestic staying visits

The other two key categories of staying trip are visits to friends/relatives (VFR) and business trips, (including business only and combined business and leisure trips). Over time, both have increased, although VFR trips were level with last year. This is shown in the table below.

Type of domestic staying trip	Volume in Q1 2009	% change Q1 2009 vs. 2008	% change Q1 2009 vs. 2007
Visiting friends and relatives	50,000	=	+11%
Business/leisure and business	23,000	+9%	+30%

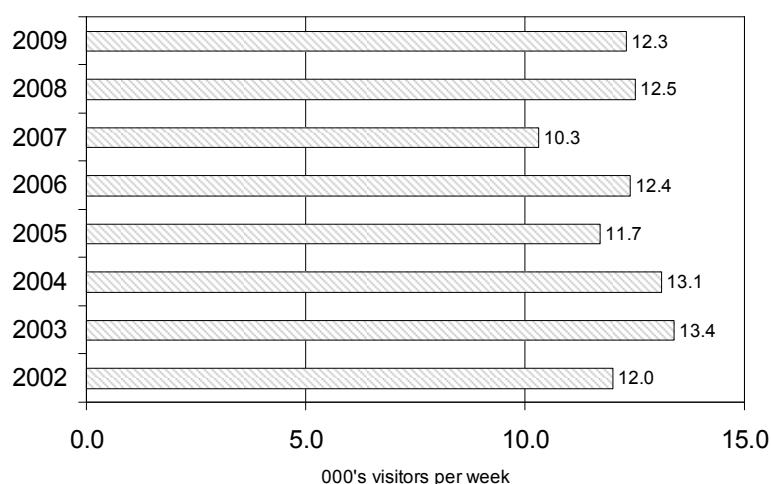
Estimated total number of domestic staying visitors

With little change in each of the different categories of domestic staying visitors, the total number of domestic staying visitors is very similar to last year, at -2%. National tourism figures are available for January and February only: these show a steep decline in the number of trips (-13% in the UK). Consequently the trend on the Island across the quarter compares favourably with the UK picture (for January and February).

Returning to the Isle of Wight, staying trips were up considerably on the low point seen in 2007 (+19%) and on a par with 2006.

Estimated number of domestic staying visitors Q1 2009 vs. previous years

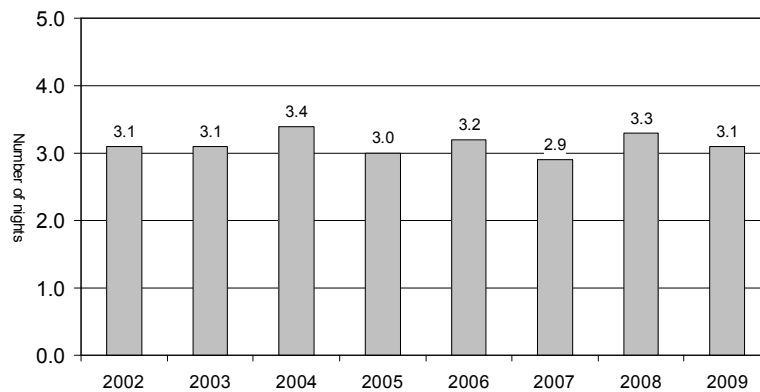
Average visitors per week



Average length of stay

The average length of stay for all types of domestic staying trips was 3.1 nights; length of stay has fluctuated around the same level for the last few years. The resulting estimated demand for bednights was approximately 470,000 bednights. Excluding stays with friends and relatives means an estimated 340,000 bednights were needed. The slight drop in length of stay reduced demand for bednights by 9% versus last year.

Average length of stay
Q1 2009 vs. previous years

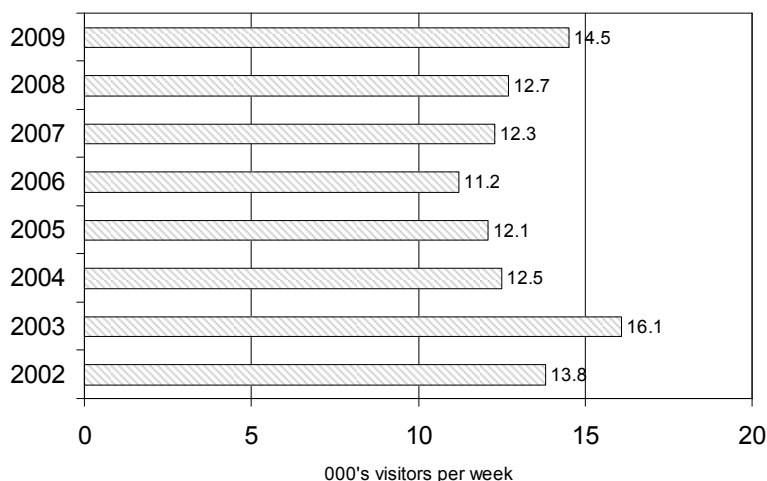


Estimated number of domestic day trips

There were approximately 180,000 day trips which equates to 14,500 per week; this is an increase of 14% vs. last year. After three years of declining numbers of day visits, between 2003 and 2006, this is the third year that day visits have increased in number. The trips which produced this increase are discussed below.

Estimated number of domestic day visitors
Q1 2009 vs. previous years

Average visitors per week



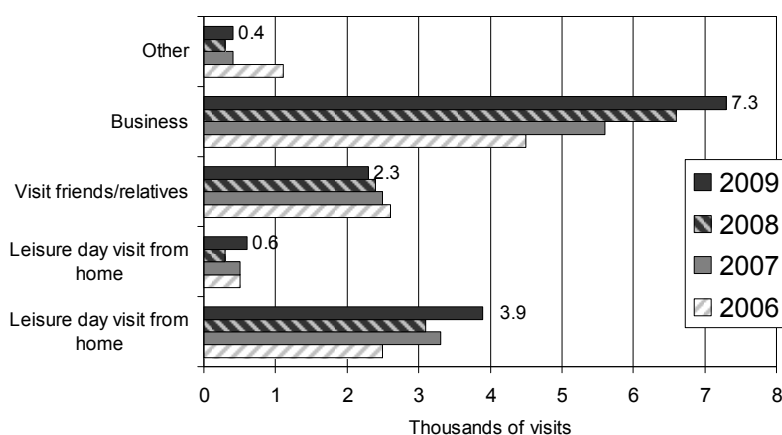
The most important category of day trip was business trips: it is estimated that there were over 90,000 of these, equivalent to over 7,000 a week. The last three years have seen an increase in the number of business/commuting trips: these are up by 11% on last year and by 63% on 2006.

Leisure day visits (LDV) are another important category. There were an estimated 56,000 which equates to 4,500 per week. These trips have increased in number over recent years and are up by 32% vs. last year and by 50% vs. 2006.

Just under 30,000 trips to visit friends/relatives were made; there has been little change in these over recent years and there is some evidence of a slight decline since 2006.

Estimated number of domestic day visitors Q1 2009 vs. previous years

Average number of visits per week



New versus repeat visitors to the Island

Leisure visitors (domestic and from overseas) are asked when they last visited the Isle of Wight. The following data excludes those visiting friends and relatives as these are, by definition, likely to be frequent visitors. (94% of VFR visitors had visited the Island before.)

Day visitors: a large proportion (62%) of leisure day visitors were on a second or subsequent visit in a period of 12 months indicating a high degree of satisfaction with the Isle of Wight as a destination. At this time of year, only a quarter of leisure day visitors were new/lapsed after more than 5 years.

Staying visitors: just under half of the holiday/short break visitors were on second or subsequent visit in the last 12 months. Over a third (35%) of staying visitors were new/lapsed after more than 5 years; the proportion of new visitors is up by several points on last year.

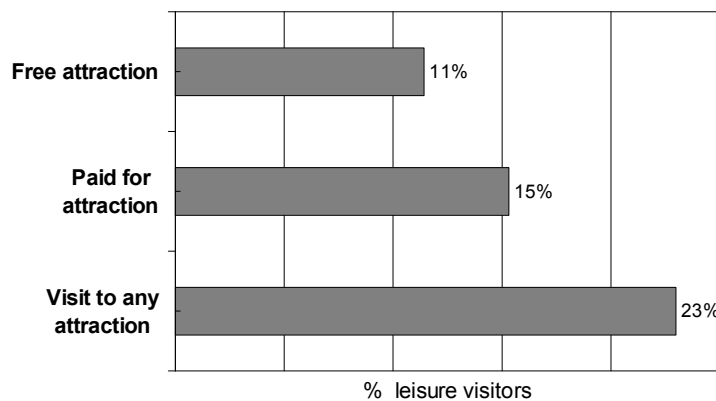
	Leisure Day visitors (not VFR)	Short break visitors (not VFR)
First visit to Island	12%	18%
Visited before in last 12 months	62%	46%
Visited before 12 months to 5 years ago	14%	20%
Lapsed (visited before, more than 5 years ago)	12%	17%

Based on these percentages, it is estimated that approximately 42,000 new or lapsed leisure visitors came to the Island on either a day trip or a short break/holiday in this quarter. This is an increase on the winter quarter last year and of around 25% due primarily to an increase in short break visitors.

Visits to attractions

It is estimated that over a fifth of leisure visitors went to at least one of the Island's attractions; attractions charging an entrance fee drew more visitors (15%) than the free* attractions (11%).

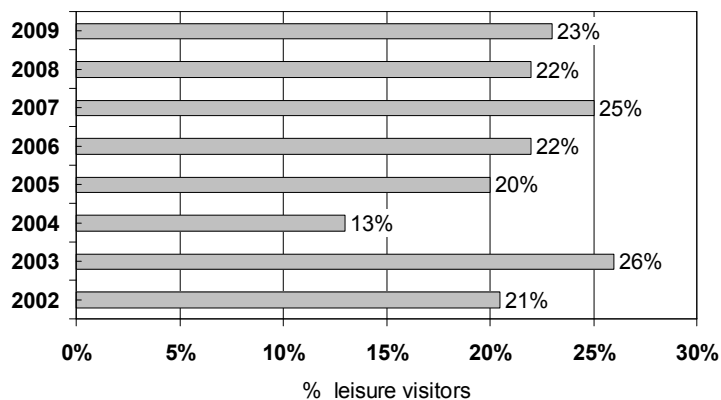
**Estimated visits to types of attractions
Q1 2009**



* N. B. Recall of visits to free attractions may be underestimated due to the reliance on respondent's recall.

Over recent years there have been small fluctuations in the numbers visiting attractions during this winter period.

**Estimated visits to any type of attraction
Q1 2009 vs. previous years**



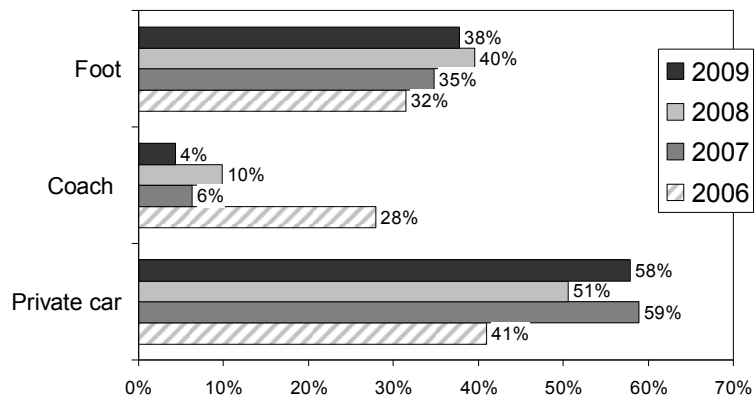
Mode of transport

All visitors are asked how they travelled to the mainland terminal and around the Island. Mode of travel on board the ferry is also recorded and used to estimate the overall split between visitors travelling as car, coach and foot passengers.

Mode of travel on board the ferry

Car accompanied travel has increased by 7 points to 58% of visits. Most of this increase has come from coach accompanied travel which accounted for only 4% of visits in this period – a decline on last year of 6 points and remaining significantly below the level seen in 2006. The proportion of visitors travelling as foot passengers was at a similar level to last year.

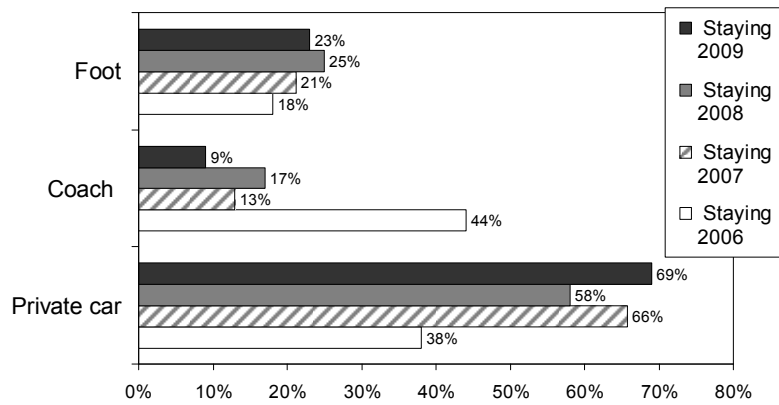
Mode of travel on board the ferry
Quarter 1, 2009 vs. previous years



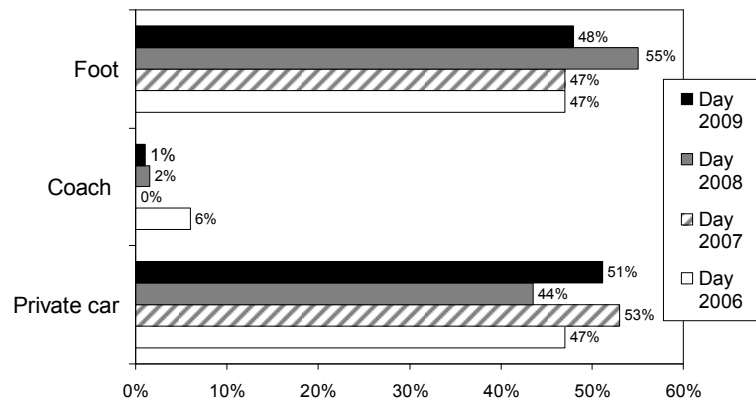
Analysis of mode of travel amongst staying and day visitors is shown on the following charts.

- Staying visitors: travel by car increased by 11 points to its highest level, reversing the reduction seen at this time last year. This increase was due mainly to a reduction in coach travel; foot passenger travel remained at a similar level
- Day visitors: the increase in the proportion travelling on foot seen last year was eroded and converted back to travel with a car. Day visitor travel by car, on foot and by coach is now back in line with 2007.

Mode of travel on board the ferry
 Quarter 1, 2009 vs. previous years
 Staying visitors



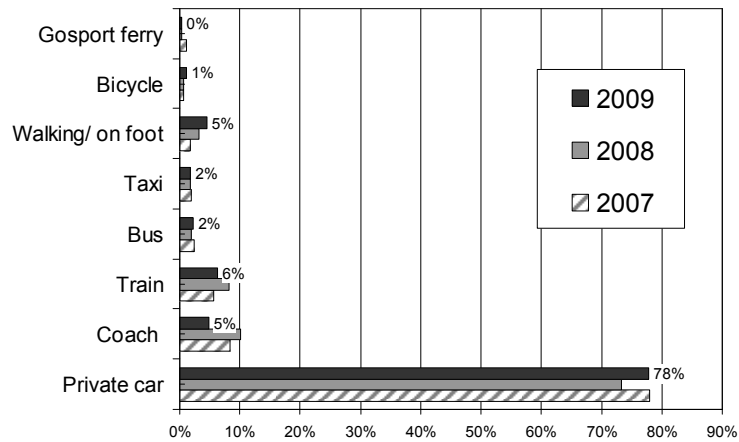
Mode of travel on board the ferry
 Quarter 1, 2009 vs. previous years
 Day visitors



Mode of transport to the mainland terminal

The vast majority used a private car to travel to the mainland port (78%), in line with previous years, and use of a car increased versus last year to the level seen in 2007. Use of other modes varied very little versus the last two years.

Transport used to travel to the mainland terminal Quarter 1, 2009 vs. previous years



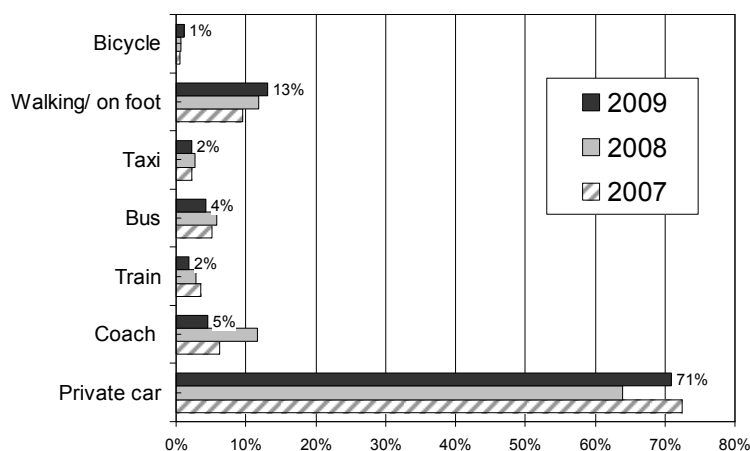
The only significant differences between day and staying visitors were that staying visitors were more likely to arrive by coach (9% of staying vs. 1% of day) and day visitors were more likely to arrive on foot (8% of day vs. 1% of staying). Travel to the port by car was at a similar level for both day and staying visitors.

Mode of transport to travel around the Island

On the Island, the majority continue to travel around by private car and this has increased versus last year. This percentage exceeds that travelling with a car on the ferry due mainly to those for whom a relative provides transport (11%). The proportion who were walking has increased slightly each year and is now at 13%. Use of buses and trains on the Island was at a low level (4% and 2% respectively).

There were some differences between day and staying visitors: day visitors were much more likely than staying visitors to be walking (21% of day vs. 4% of staying) whereas staying visitors were more likely to travel by car (81% of staying vs. 61% of day) or coach (9% of staying vs. 1% of day).

Transport used to travel around the Isle of Wight Quarter 1, 2009 vs. previous years



Value of tourism

Tourism is estimated to have contributed £41 million to the Isle of Wight economy during winter 2009; this equates to £3.3 million per week after adjusting for the quarter length. This is a slight increase (+2% excluding inflation) versus last year, which was itself a significant increase on 2007, and is due to the increase in day trips.

The value of domestic staying visits is down by an estimated 3% which suggests that the Island has outperformed national tourism; UK and England data is available for January and February only at present but this shows a decline in value of 11% for the UK and 14% for England for domestic staying visits.

Staying trips are estimated to be worth almost £34 million or a weekly average of 2.7 million and day trips contributed almost £7 million, an average of half a million pounds per week.

<u>Staying trips</u>	
All domestic staying trips	£31 million
All overseas staying trips	£3 million
<u>All staying trips</u>	<u>£34 million*</u>
<u>Day trips</u>	
<u>All day trips</u>	<u>£7 million*</u>

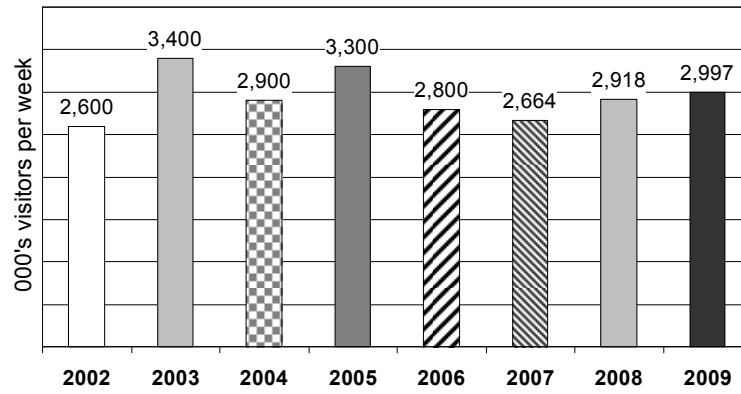
* Addition of individual figures varies from total due to rounding of figures.

Activity at Island Tourist Information Centres

During this quarter, almost 38,000 people visited the Island TIC's; an average of 3,000 per week. (This figure includes visitors to the Island and residents). This is up slightly on the last three years.

The average spend was £13.07,* which is down by 10% on last year but remains ahead of the previous two years.

Number of visitors to TIC offices Q1 2009 vs. previous years



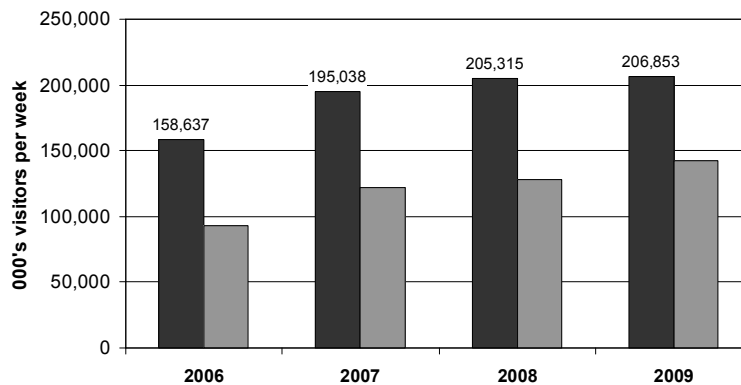
*N.B. This figure includes sales to residents of tickets for local events and for National Express travel.

Website activity: islandbreaks.co.uk

The Isle of Wight Tourism website attracted almost 207,000 visits during January to March (full months). This is on a par with last year (+1%) although the number of unique visitors to the site has increased by 11% to 142,000.

Over the medium term, visits and unique visitors to the site have increased dramatically – up by 30% and 54% respectively.

**Number of visitors to islandbreaks.co.uk
Jan – Mar 2009 vs. previous years**



Occupancy statistics

The Isle of Wight occupancy statistics for winter 2009 will be issued in a separate bulletin.

Spring tourism bulletin

Visitor statistics for the next period, from Easter to the middle of July, will be issued in late August.