

Tourism trends quarterly bulletin  
Visitor Statistics for Winter: January to pre Easter 2007 (Q1)

Introduction

This bulletin provides the key findings of the tourism monitor for the period January 1<sup>st</sup> to March 25<sup>th</sup> 2007. This is the quietest trading period for tourism and some attractions and accommodation providers close for part of this period.

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 Tourism supply additional data.

Trend data since 2001 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 in early April (6<sup>th</sup> - 9<sup>th</sup>); which is earlier than last year (14<sup>th</sup> - 17<sup>th</sup> April). Once again the whole quarter fell before the clocks changed to summertime.

Looking first at international travel, during January to March, the number of overseas visitors to the UK\* increased slightly (+2%) to reach 8.5 million visits; trips abroad by UK residents increased by the same degree, taking these to just over 17 million trips.

Data on domestic travel trends is not yet available.

Total travel across the Solent (combining travel by residents and visitors) was at a similar level to the last two years; at this time of year residents account for approximately 60% of travel across the Solent.

Turning to the Isle of Wight, there were some significant changes in the mix of visitors this winter:

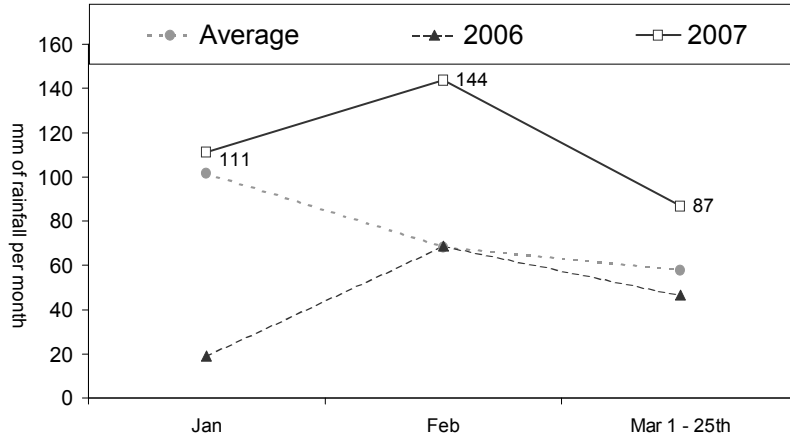
- Short breaks (lasting 1 - 4 nights) decreased due to a fall in the number of short breaks taken by coach. Two holiday centres catering for this market closed, contributing to the significant reduction in holidays by coach.
- The effect of this loss of coach holidays was offset by an increase in the proportion of staying visitors arriving by car; the higher average spend by car visitors than coach visitors helped to minimise the negative impact on tourism spend.
- Staying VFR visits and business trips both increased (+11% and +20% respectively).
- Day visitors increased, reversing the downward trend seen over the previous 3 years: business trips were up by 23%, to reach 67,000; leisure day visits by 29% to reach 46,000.
- Islandbreaks.co.uk performed extremely well in this quarter: there were almost 200,000 visits, which is an increase of 23% versus last year.
- The value of tourism this quarter is estimated at £31 million. This is a decrease on last year (-16%, excluding the effect of inflation) due to the loss of coach accompanied staying leisure visits. Other types of staying trip increased, as did day trips, but these did not compensate for the loss in coach accompanied short breaks.
- There has been major engineering works at Portsmouth during this quarter which has caused disruption on this route. This will have deterred some leisure travel to the Island.

\*International Passenger Survey data (seasonally adjusted)

## Weather

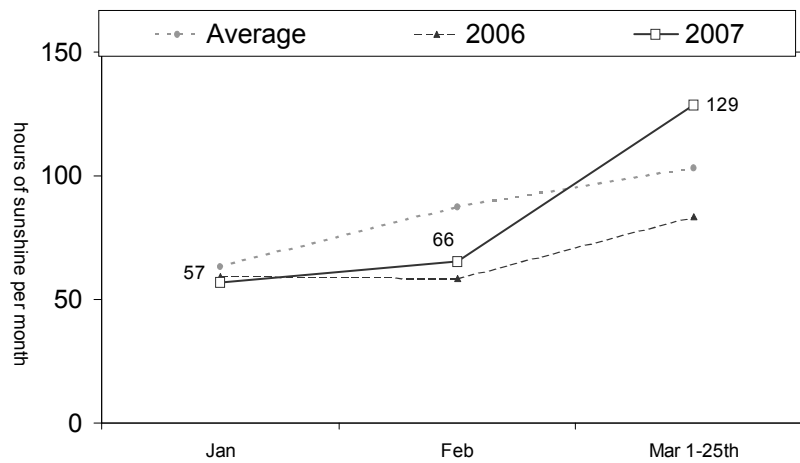
This winter was the wettest for several years with rainfall exceeding the average and up significantly on recent years. Rainfall in January was 5 times greater than 2006 and in February and March there was around double the rainfall in 2006.

Rainfall on the Isle of Wight  
Q1, 2007 vs. 2006 and long term average



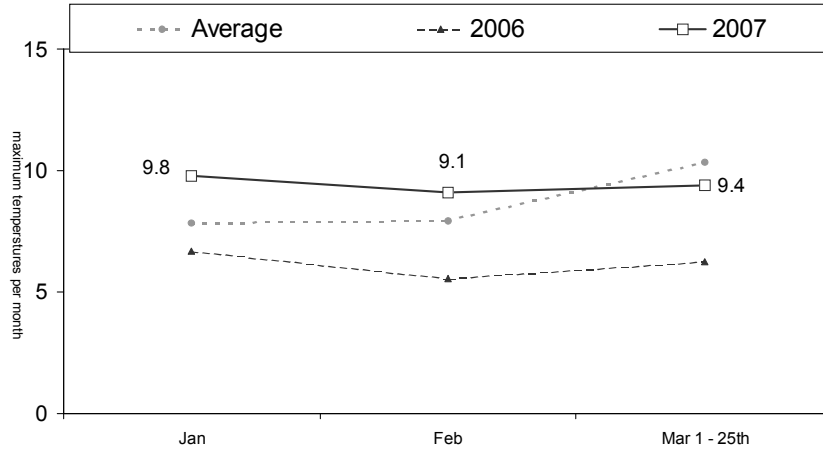
Despite this wet weather, during January and February sunshine hours were similar to the average and to 2006 and in March sunshine exceeded the average and the last three years.

Sunshine on the Isle of Wight  
Q1, 2007 vs. 2006 and long term average



The weather was milder than last year and, in January and February, it was a little warmer than average for the time of year.

Maximum temperatures on the Isle of Wight  
Q1, 2007 vs. 2006 and long term average



### Estimated number of leisure short break and holiday visitors

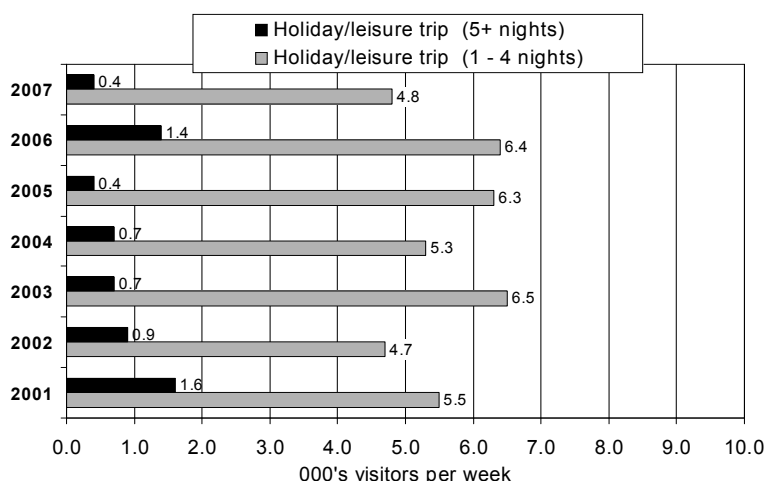
It is estimated that there were 62,000 domestic leisure staying visitors in this winter period. The vast majority of these were visitors taking a short break of 1 - 4 nights (58,000); the remaining 4,000 were on a holiday of 5+ nights.

This is not a key period for short breaks and holidays; approximately 10% of the annual total are taken in this quarter. Taking the average number of trips per week, to allow comparison over time, shows approximately 4,800 short breaks a week and 400 holidays of 5+ nights per week; hence there has been a decline in volumes this year versus the last two years.

Looking specifically at short breaks, these were down by 25% in 2007 versus 2006. This fall is wholly attributable to a fall in short breaks taken by coach. The average party size amongst those taking a short break by coach declined significantly, this was compounded by a reduction in the number of coaches. Together this resulted in a fall of 65% in short breaks taken by coach. An increase in visitors taking a short break arriving by car cushioned this fall.

### Estimated number of domestic short break and holiday leisure visitors Q1 2007 vs. previous years

#### Average visitors per week



Small sample sizes within 5+ nights sample cause fluctuations: data should be treated with caution

At this time of year there are hardly any short break visitors from overseas.

### Total number of staying visitors

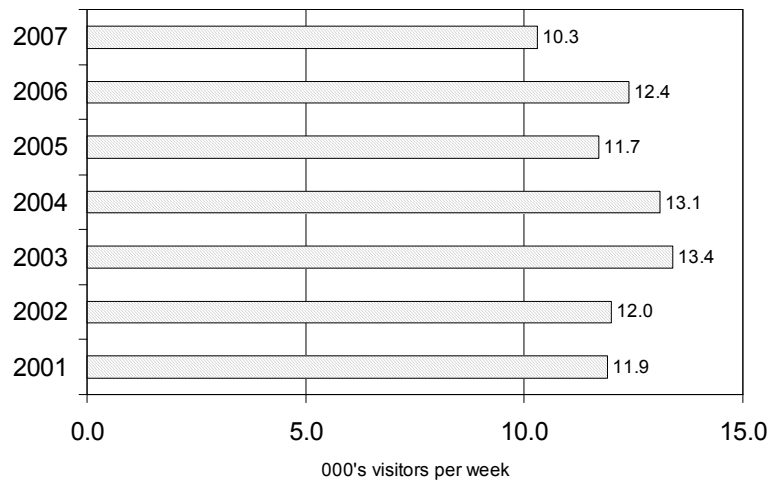
Looking at all staying visitors during the winter, an estimated 134,000 visitors went to the Island on an overnight trip; 93% of whom were domestic visitors (124,000).

This equates to an average of 10,300 domestic staying trips each week. This is a decrease versus recent years: -17% vs. 2006 - but that fall is due to the decrease in holidays/short breaks by coach, discussed above.

The table below shows the increases seen in the three other segments: business trips, combined business and leisure trips and the important VFR segment.

## Estimated number of domestic staying visitors Q1 2007 vs. previous years

### Average visitors per week



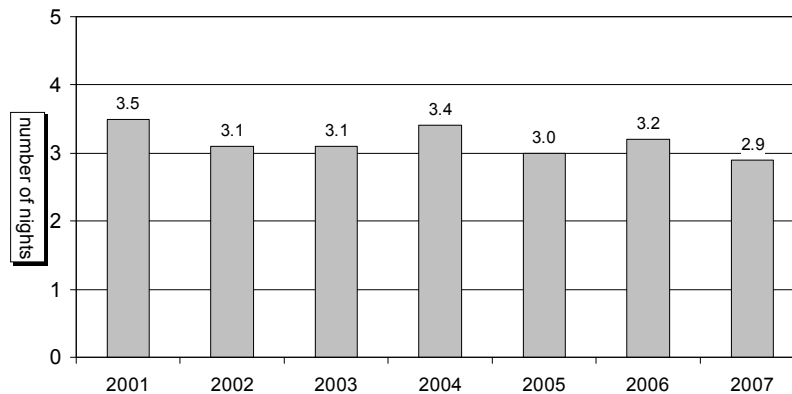
Type of staying trip	Volume in Q1 2007	% change Q1 2007 vs. 2006
Visiting friends and relatives	43,000	+11%
Business/leisure and business	17,000	+20%

### Average length of stay

The average length of stay for all types of staying trips was 2.9 nights: this is down slightly versus last year and 2004 but at a similar level to 2005.

This resulted in a need for approximately 355,000 bednights. Excluding stays with friends and relatives means around 240,000 bednights were needed.

### Average length of stay Q1 2007 vs. previous years



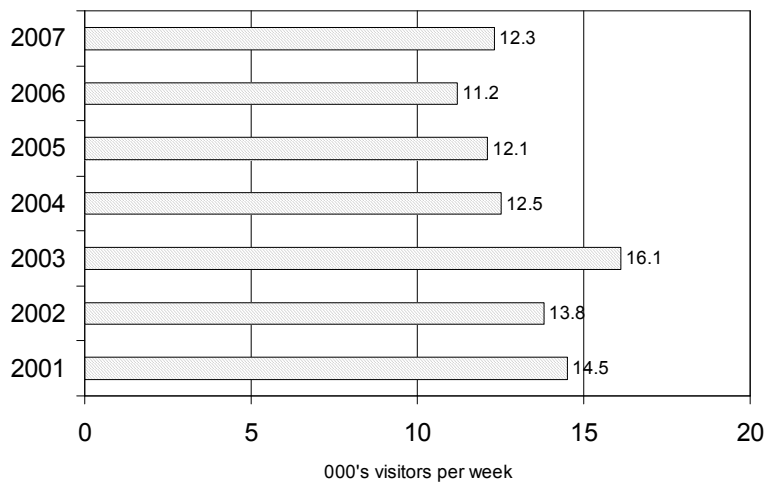
Numbers of day visitors

An estimated 151,000 day visits were made to the Island and almost all of these were domestic day visits (97%; 147,000). This is an average of 12,300 domestic visits per week, which reverses the long term decline in day visits during the winter.

Both business trips and leisure day visits increased significantly; these are the two most numerous types of day trip in the winter. VFR day trips were in line with last year.

Estimated number of domestic day visitors  
Q1 2007 vs. previous years

Average visitors per week



Type of day trip	Volume in Q1 2007	% change Q1 2007 vs. 2006
Business trips	67,000	+23%
Leisure day visits	46,000	+29%
Visiting friends and relatives	30,000	-3%

### New versus repeat visitors to the Island

Leisure visitors 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. (99% of VFR visitors had visited the Island before.)

During this quarter, three quarters of leisure visitors had visited in the last 5 years; this demonstrates a high degree of satisfaction with the Island.

Day visitors: one tenth (11%) of leisure day visitors were on their first visit to the Island. A similar proportion (12%) returned to the Island after a break of 5 or more years, hence a total of 27% new/lapsed visitors went to the Island.

Staying visitors: 13% of those on a short break were new visitors; another 12% were visiting for the first time in 5 years, hence 25% were new or lapsed visitors.

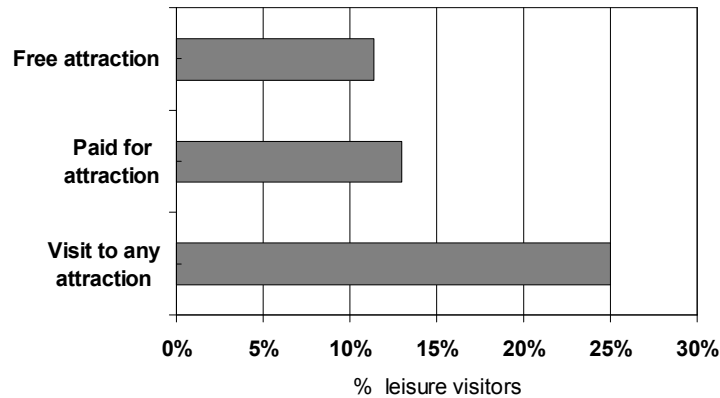
	Leisure Day visitors (not VFR)	Short break/holiday visitors (not VFR)
First visit to Island	11%	13%
Visited before in last 12 months	62%	54%
Visited before 12 months to 5 years ago	15%	21%
Visited before but more than 5 years ago	12%	12%

Based on these percentages, it is estimated that approximately 26,000 new or lapsed leisure visitors came to the Island on either a day trip or a short break/holiday in this quarter.

### Visits to attractions

It is estimated that a quarter of leisure visitors went to at least one of the Island's attractions, with slightly more visiting attractions charging an entrance fee than free\* attractions.

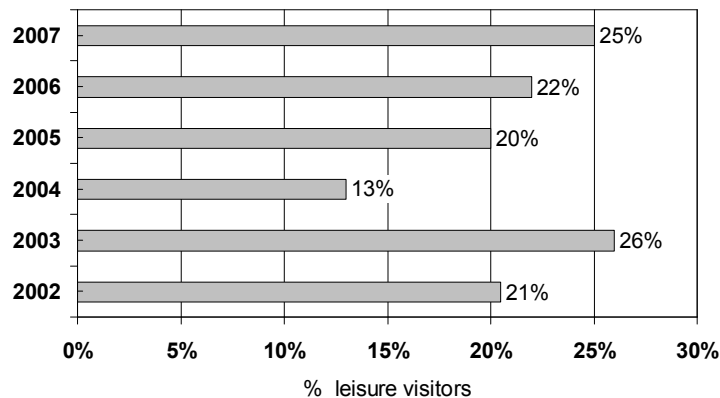
Estimated visits to types of attractions  
Q1 2007



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

This is the third consecutive year that visits to attractions have increased since the drop recorded in 2004; this takes the popularity of attractions back to the level seen in 2003 when visits reached a peak.

Estimated visits to any type of attraction  
Q1 2007 vs. previous years



### Mode of transport

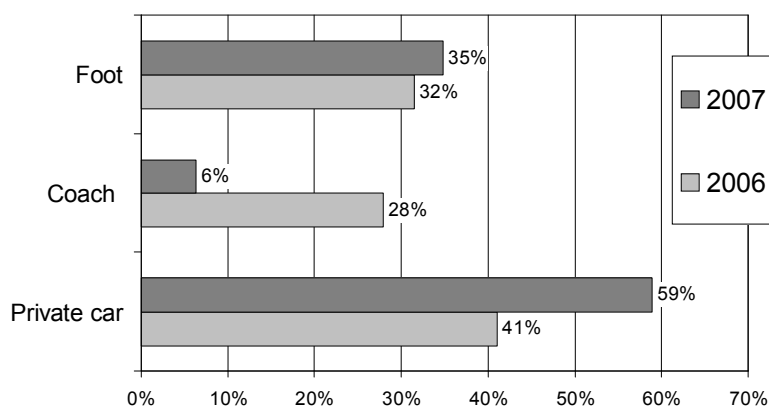
All visitors are asked how they travelled to the mainland terminal and around the Island. Mode of travel on board the ferry is also recorded and used to estimate the overall split between visitors travelling as car, coach and foot passengers.

Historical data is now available.

### Mode of travel on board the ferry

During the winter last year, two fifths were travelling by car with the remainder divided fairly evenly between coach travel and on foot. This year has seen a dramatic change in mode of travel with coach travel dropping back from 28% to 6%. This change has arisen from a decline in the number of coaches, but more significantly, a fall in the average party size. Car accompanied travel has taken the place of the coach travel; travel on foot has increased very slightly.

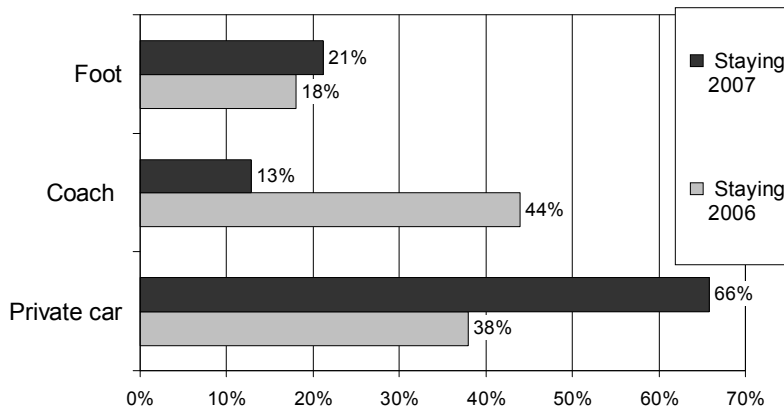
Mode of travel on board the ferry  
Quarter 1, 2007 vs. 2006



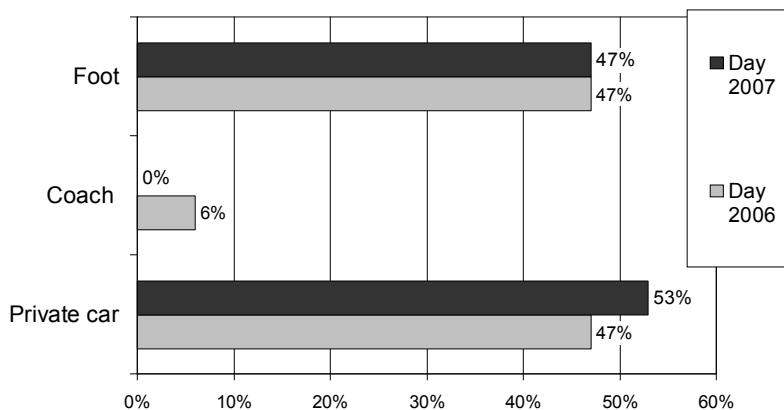
Analysis of mode of travel amongst staying and day visitors shows that the biggest changes have been amongst the staying visitors: coach travel has dropped from 44% accompanied by a coach down to only 13%. The reduction in short breaks, discussed earlier is directly linked to this. Alongside this decline, propensity to travel by car has increased dramatically amongst staying visitors; there has been a slight increase in staying visitors travelling on foot.

Changes amongst day visitors have been less dramatic although this sector has also seen the small percentage of coach travel almost eradicated alongside a 6 point increase in travel by car.

Mode of travel on board the ferry  
 Quarter 1, 2007 vs. 2006  
 Staying visitors



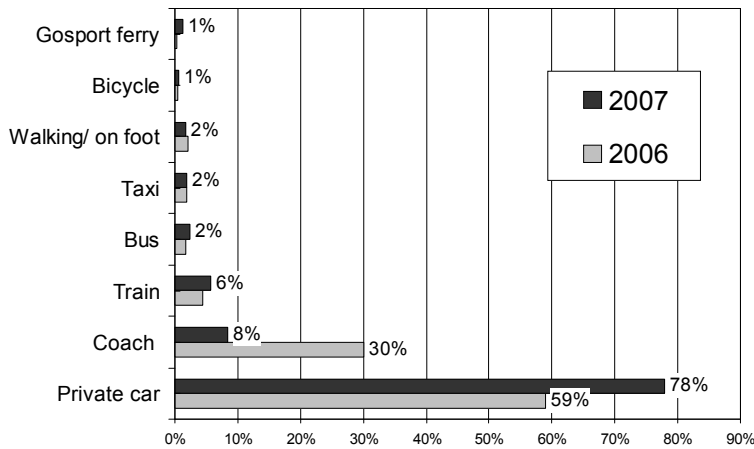
Mode of travel on board the ferry  
 Quarter 1, 2007 vs. 2006  
 Day visitors



Mode of transport to the mainland terminal

The majority (78%) travelled to the mainland port by private car, the importance of which has increased significantly since last year. In line with travel on board, there was a drop off in the proportion travelling by coach - down by 22 points. Other modes were used by a minority.

### Transport used to travel to the mainland terminal Q1 2007 vs 2006



There were minor differences between day and staying visitors: almost all arriving by coach were staying visitors; slightly more day visitors came by car.

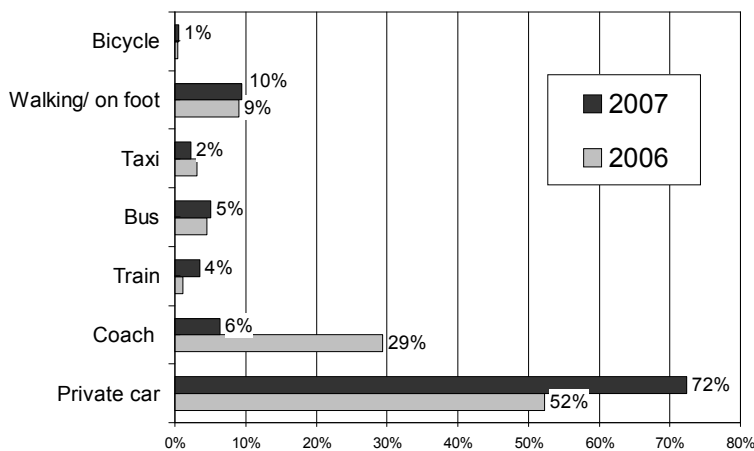
### Mode of transport to travel around the Island

Once on the Island, the pattern of transport use changed slightly versus the mainland: use of public transport increased slightly along with walking (10%).

The main difference, shown below, is the reduction in coach travel.

There were some differences between day and staying visitors: day visitors were more likely than staying visitors to be walking and using the train; staying visitors made greater use of their cars and almost all those travelling by coach were staying visitors.

### Transport used to travel around the Isle of Wight Q1 2007 vs 2006



N.B. It is assumed that anyone travelling with their own car on the ferry uses that as their main mode of transport to the port. Likewise, those travelling with a coach on the ferry are assumed to travel by coach to the port.

### Value of tourism

The value of tourism during this winter period has been particularly affected by the drop in staying visitors travelling by coach. Whilst other categories of staying trips increased, as did day trips, these have not compensated for the loss in coach accompanied short breaks/staying visits.

It is estimated that tourism contributed £31 million to the Isle of Wight economy during winter 2007. After taking account of the quarter length, this equates to £2.6 million per week; this is a decrease of 16% (excluding inflation) on winter 2006.

Staying trips were worth just over £25 million and day trips added more than £5 million.

<u>Staying trips</u>	
All domestic staying trips	£22 million
All overseas staying trips	£4 million
<u>All staying trips</u>	<u>£25 million*</u>
<u>Day trips</u>	
<u>All day trips</u>	<u>£5 million*</u>

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

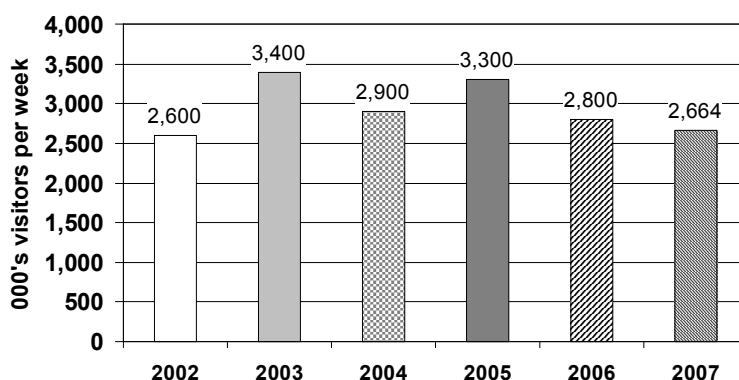
Mode of travel is a relatively new addition to this research survey and at present the calculation of the value of tourism does not take account of mode and the different spend by visitors arriving by coach, car or on foot. Further research would be needed to do this, and the best way to collect such data is to be explored.

### Activity at Island Tourist Information Centres

During Q1, approximately 32,000 people visited the Island TIC's, an average of 2,700 per week. This is below the last four years but in line with 2002.

The average spend was £11.08, which is an increase of 31% versus last year. This considerable increase is due to the sale of tickets for the Bestival concert during March.

Number of visitors to TIC offices  
Q1 2007 vs. previous years



Website activity: [islandbreaks.co.uk](http://islandbreaks.co.uk)

The Isle of Wight Tourism website continues to perform extremely well with increasing numbers of visitors each year. In the 3 month period from January to end of March, 195,000 visits were made to the website, which is an increase of 23% on the same period last year.

N.B. In Q1 (1<sup>st</sup> January - 25<sup>th</sup> March) there were 179,000 visits to the website

Occupancy statistics

The Isle of Wight occupancy statistics for winter 2007 will be issued in a separate bulletin.

Spring tourism bulletin (March 26<sup>th</sup> to 16<sup>th</sup> July, 2007)

Visitor statistics for the next trading period will be circulated in late August.