

Tourism trends quarterly bulletin  
Visitor Statistics for Winter: January to pre Easter 2008 (Q1)

Introduction

This bulletin provides the key findings of the tourism monitor for the period January 1<sup>st</sup> to March 16<sup>th</sup> 2008. 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 extremely early this year, March 21<sup>st</sup> - 24<sup>th</sup>, and the whole quarter fell before the clocks changed to summertime. (For comparison, Easter 2007 was April 6<sup>th</sup> - 9<sup>th</sup>; in 2006 April 14<sup>th</sup> - 17<sup>th</sup>).

Looking first at international travel, during January to March the number of overseas visitors to the UK\* increased by 3% to reach 8.5 million visits. Trips from North America were down with the growth coming primarily from visits originating in Europe, reflecting the strength of the pound against the dollar and the Euro against the pound. Trips abroad by UK residents increased 2%, taking these to 18 million trips.

Data on domestic travel trends is not yet available.

Total travel across the Solent (combining travel by residents and visitors) has been at a similar level across the last 3 years but travel by residents has dropped slightly (-7% vs. 2007) whilst travel by visitors has increased (+9% vs. 2007).

Looking specifically at these visitors, there have been some changes in the mix of visitors coming to the Island:

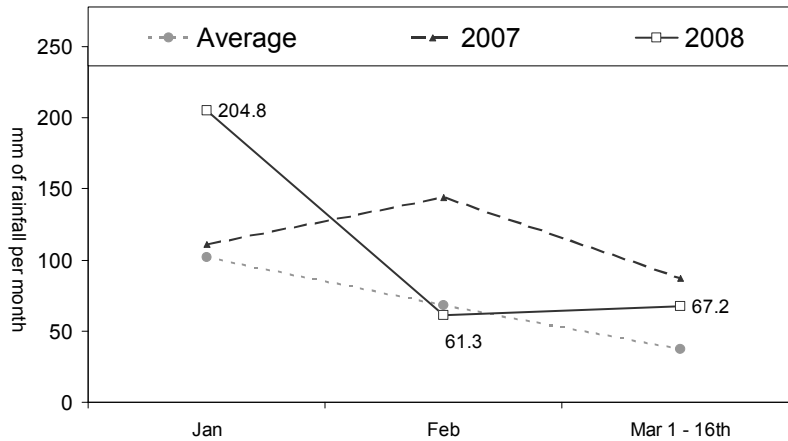
- Short breaks (domestic visits lasting 1 - 4 nights) increased to 64,000, overcoming much of the reduction seen last year when coaching short breaks fell dramatically.
- Total domestic staying visits to the Island reached 135,000. Alongside the increase in domestic short breaks, increases were seen in visits to friends/relatives (+11%) and business visits (+19%).
- Day visitors reached 140,000, the majority of whom were domestic visitors. Domestic day visitors were up slightly on last year (+3%) due solely to an increase in business visitors (+19%). Leisure day visits were down in number (-11%) and visits to friends/relatives dropped by 7%.
- The proportion of leisure visitors going to attractions declined slightly to 22%; the decline in number of leisure day visitors will also have impacted negatively on visits to attractions.
- Half the visitors travelled by car, slightly less than last year, whilst share of travel on foot increased by 5 percentage points. Coach share of travel was up 4 points on last year but remained well below the level seen in 2006.
- Visits to the Island TIC's increased slightly (+10%) vs. 2007. In addition there were 165,000 visits to Islandbreaks.co.uk, 2% up on winter 2007.
- The value of tourism this quarter is estimated at £34 million, an increase of 17% in the weekly average value versus 2007, recovering the value which was lost last year and taking the value of tourism back to the level in 2006. This increase is attributable to the increase in staying visits.

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

Weather

The winter started with a very wet January - the wettest since 1999 - with rainfall double the average for the month and last year. The weather improved considerably in February when rainfall was at the expected level and much drier than last year. In the first half of March it was a little wetter than expected.

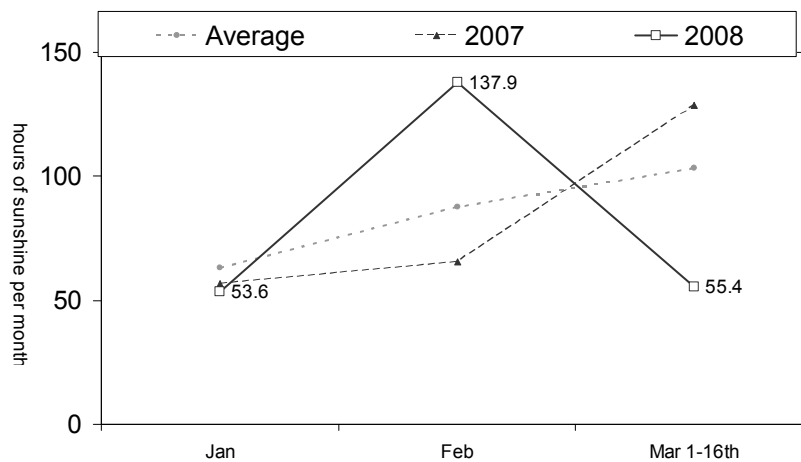
Rainfall on the Isle of Wight  
Q1, 2008 vs. 2007 and long term average



March 2007 was 1<sup>st</sup> to 25<sup>th</sup>

Despite the rainfall, sunshine in January was in line with the norm for this time of year but February was extremely sunny, the sunniest since 1988. The wetter weather, which returned at the start of March meant below average sunshine.

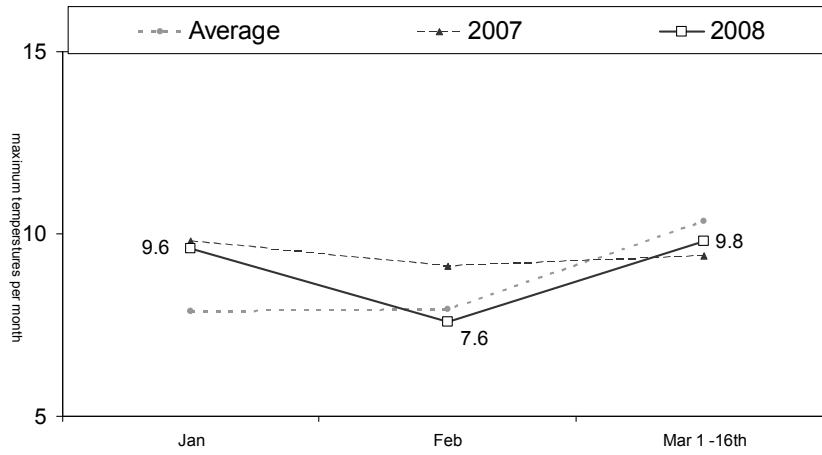
Sunshine on the Isle of Wight  
Q1, 2008 vs. 2007 and long term average



March 2007 was 1<sup>st</sup> to 25<sup>th</sup>

Looking at the maximum temperatures, January was very mild, February and March were in line with the average for this time of year.

Maximum temperatures on the Isle of Wight  
Q1, 2008 vs. 2007 and long term average



March 2007 was 1<sup>st</sup> to 25<sup>th</sup>

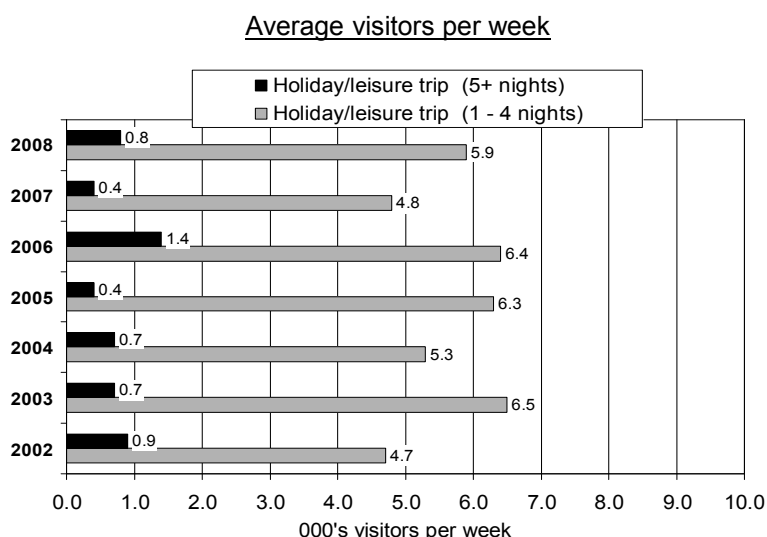
### Estimated number of leisure short break and holiday visitors

At this time of year, approximately a quarter of all visitors to the Island were on holidays or short breaks and it is estimated that there were 73,000 domestic leisure staying visitors in this quarter. The vast majority of these were visitors taking a short break of 1 - 4 nights (64,000); only a small number were on a holiday of 5+ nights (under 9,000).

Taking the average number of trips per week, to allow comparison over time, shows almost 6,000 short breaks a week and 800 holidays of 5+ nights per week.

Looking specifically at short breaks, last year this market was adversely affected by the loss of coach based short break visitors due to the closure of some facilities on the Island. This year short breaks recovered some of this lost ground. Domestic short breaks increased by 22% versus 2007 but remained a little below 2006 (-8%). Longer holidays were up (on a small base), recovering some of the reduction seen last year.

### Estimated number of domestic short break and holiday leisure visitors Q1 2008 vs. previous years



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

### Other domestic staying visits

Increases were seen in the two other customer segments: the important VFR segment plus business trips, (combined business and leisure trips) as shown in the table below.

Type of domestic staying trip	Volume in Q1 2008	% change Q1 2008 vs. 2007
Visiting friends and relatives	43,000	+11%
Business/leisure and business	18,000	+19%

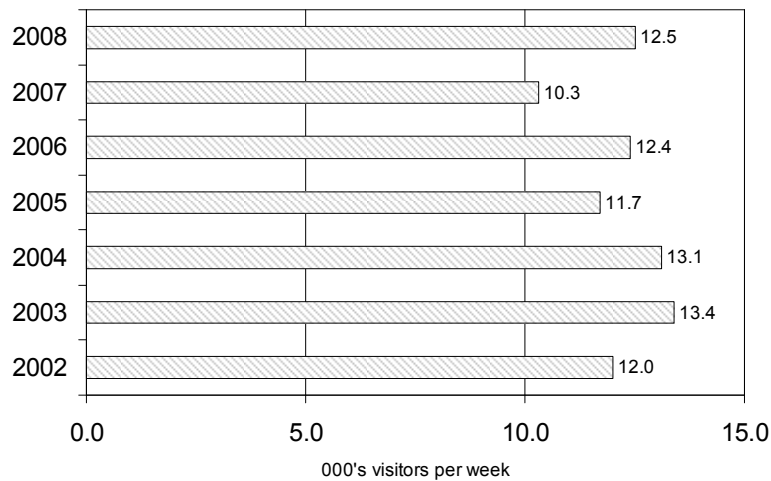
### Total number of staying visitors

Looking at all staying visitors during the winter, an estimated 141,000 visitors came to the Island on an overnight trip; the majority of whom (96%) were domestic visitors (135,000).

This equates to an average of 12,500 domestic staying trips each week which is an increase of 21% vs. 2007 and level with 2006.

### Estimated number of domestic staying visitors Q1 2008 vs. previous years

#### Average visitors per week

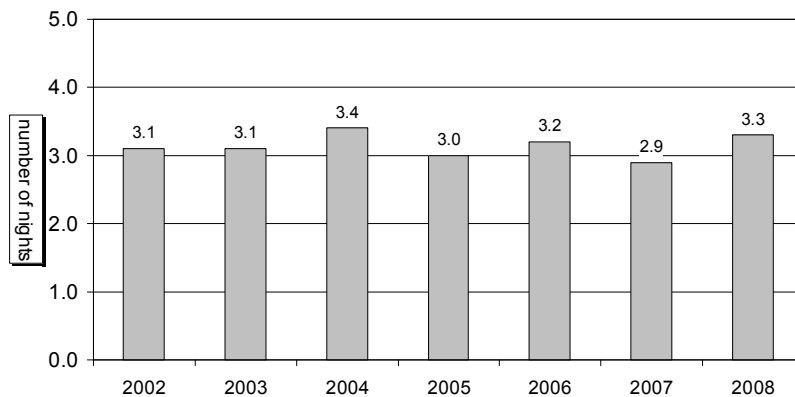


### Average length of stay

The average length of stay for all types of domestic staying trips was 3.3 nights: this is up slightly versus last year and at a similar level to 2006 and earlier.

This resulted in a requirement of approximately 440,000 bednights. Excluding stays with friends and relatives means an estimated 320,000 bednights were needed.

### Average length of stay Q1 2008 vs. previous years



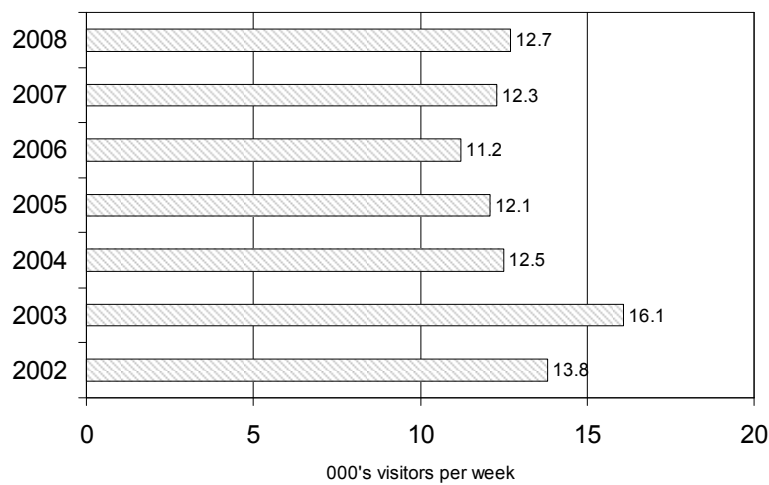
Numbers of day visitors

There were an estimated 140,000 day visits to the Island, almost all (98%) of which were made by domestic visitors, 137,000. This is an average of 12,700 per week, an increase of 3% versus last year, taking day visits back to the level seen in winter 2004.

The increase this year was due solely to an increase in business trips; these were up by almost a fifth on last year and almost 50% on 2006. Leisure day visits were adversely affected by the very early timing of Easter and decreased by 11% versus last year. Trips to visit friends/relatives also decreased slightly versus last year and 2006.

Estimated number of domestic day visitors  
Q1 2008 vs. previous years

Average visitors per week



Type of domestic day trip	Volume in Q1 2008	% change Q1 2008 vs. 2007
Business trips	72,000	+19%
Leisure day visits	37,000	-11%
Visiting friends and relatives	26,000	-7%

### 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. (95% of VFR visitors had visited the Island before.)

Day visitors: the majority of leisure day visitors are regular visitors to the Island, indicating that it is a destination they enjoy. Almost two thirds of leisure day visitors were on a second or subsequent trip in the last 12 months. The Island also attracted some new visitors: 14% were on their first ever visit and another 9% returned after a break of 5+ years.

Staying visitors: 12% of those on a short break were new visitors; another 16% were visiting for the first time in 5 years, hence 28% were new or lapsed visitors. Over half (56%) were regular visitors to the Island.

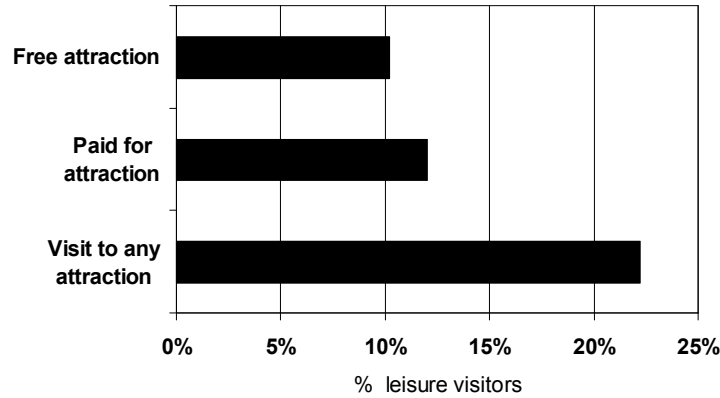
	Leisure Day visitors (not VFR)	Short break visitors (not VFR)
First visit to Island	14%	12%
Visited before in last 12 months	64%	56%
Visited before 12 months to 5 years ago	14%	16%
Visited before but more than 5 years ago	9%	16%

Based on these percentages, it is estimated that approximately 27,000 new or lapsed leisure visitors came to the Island on either a day trip or a short break/holiday in this quarter. This is a similar number to the winter quarter in 2007.

### Visits to attractions

It is estimated that just over a fifth of leisure visitors went to at least one of the Island's attractions; a similar proportion visited attractions charging an entrance fee (12%) and free\* attractions (10%).

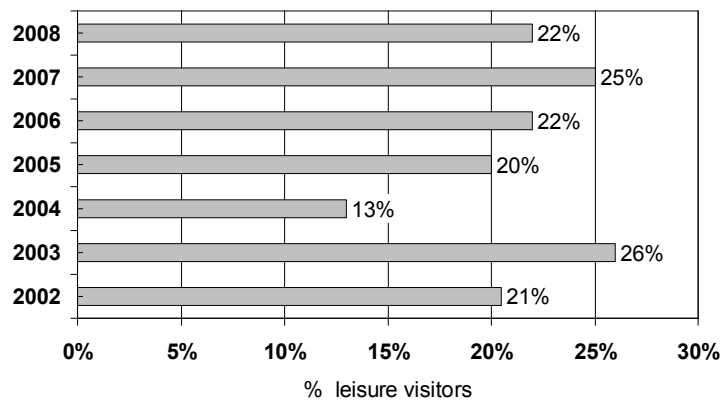
Estimated visits to types of attractions  
Q1 2008



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

The trend over time shows that there has been a slight decline since last year in the proportion visiting attractions. Visits were on a par with 2006.

Estimated visits to any type of attraction  
Q1 2008 vs. previous years



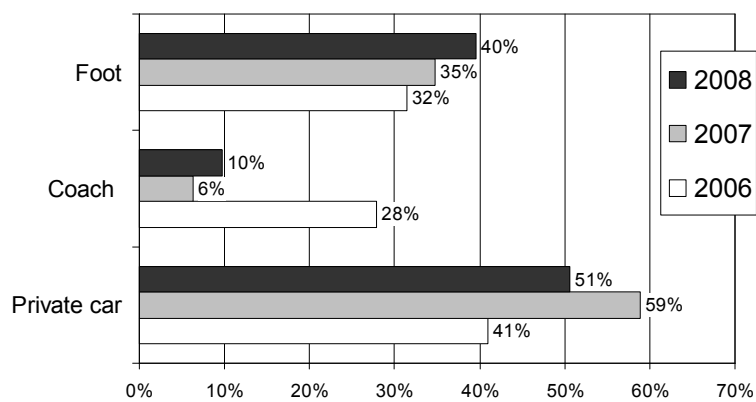
### Mode of transport

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

Last year there was a dramatic shift from away from coach to car travel; this year has seen an 8 point drop in car accompanied travel with foot and coach accompanied travel both increasing a little..

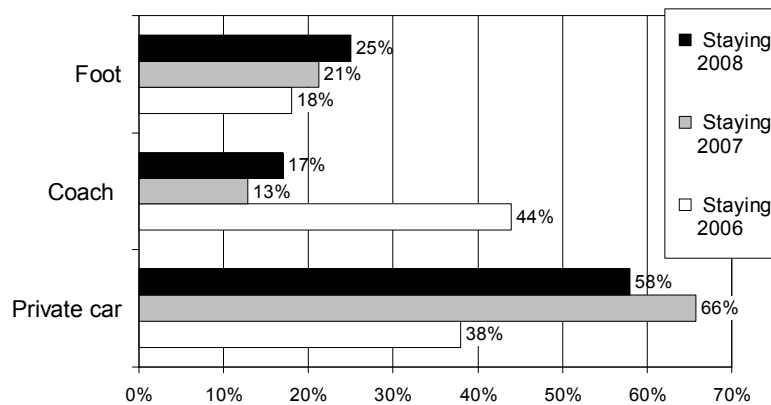
Mode of travel on board the ferry  
Quarter 1, 2008 vs. previous years



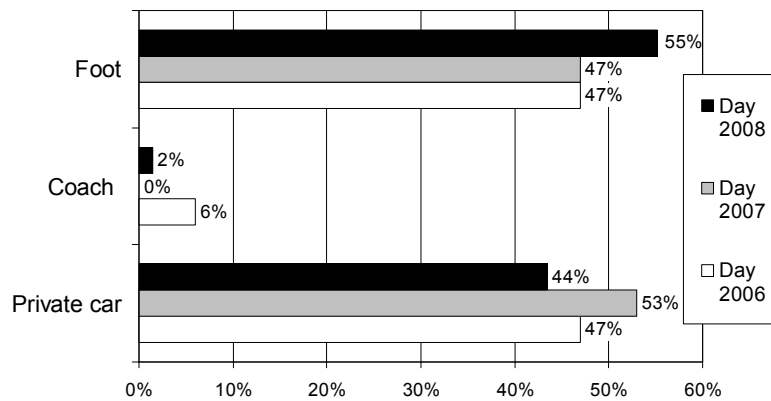
Analysis of mode of travel amongst staying and day visitors is shown on the following charts.

- Staying visitors: both travel by coach and on foot increased by 4 points with a corresponding fall in car accompanied travel.
- Day visitors: the proportion travelling on foot increased by 8 points this year, whereas last year it remained unchanged.

Mode of travel on board the ferry  
 Quarter 1, 2008 vs. previous years  
 Staying visitors



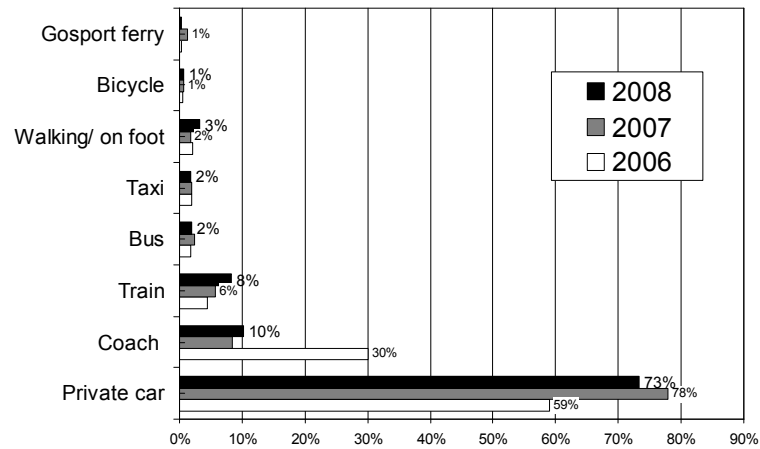
Mode of travel on board the ferry  
 Quarter 1, 2008 vs. previous years  
 Day visitors



Mode of transport to the mainland terminal

In line with previous years, the private car was used by the majority (73%) to travel to the mainland port. The proportion dropped slightly (down by 5 points) alongside a small increase in arrivals by train. It is worth noting that engineering works at Portsmouth railway station impacted on arrivals by rail last winter. Coach travel was also up 2 points.

### Transport used to travel to the mainland terminal Quarter 1, 2008 vs. previous years



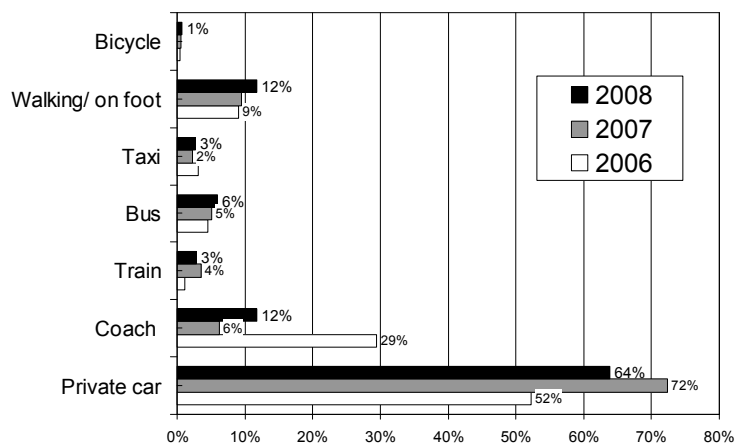
There were some small differences between day and staying visitors: staying visitors were more likely to arrive by coach (18% of staying vs. 2% of day) and by train (11% of staying vs. 5% of day); day visitors were more likely to arrive by car (80% of day vs. 69% of staying) or on foot (6% of day vs. 1% of staying).

#### Mode of transport to travel around the Island

Once on the Island, use of a car to travel around was considerably lower than for travel to the mainland port. (73% travelled to the port by car but only 64% used a car on the Island). About a fifth of those using a car on the Island were travelling in the car of a friend/relative on the Island. Use of buses and trains on the Island was at a low level (6% and 3% respectively).

There were some differences between day and staying visitors: day visitors were more likely than staying visitors to be walking (21% of day vs. 3% of staying) whereas staying visitors were more likely to travel by coach (20% of staying vs. 2% of day) or car (70% of staying vs. 59% of day).

### Transport used to travel around the Isle of Wight Quarter 1, 2008 vs. previous years



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 has increased due to the increase in staying visits. It is estimated that tourism contributed £34 million to the Isle of Wight economy during winter 2008. After taking account of the short quarter length, this equates to £3.1 million per week; this represents an increase in the region of +17% versus (excluding inflation) on winter 2007 and takes tourism spending back to the value estimated for 2006.

Staying trips are estimated to be worth almost £29 million with day trips adding just over £5 million.

<u>Staying trips</u>	
All domestic staying trips	£26 million
All overseas staying trips	£2 million
<u>All staying trips</u>	<u>£29 million*</u>
<u>Day trips</u>	
<u>All day trips</u>	<u>£5 million*</u>

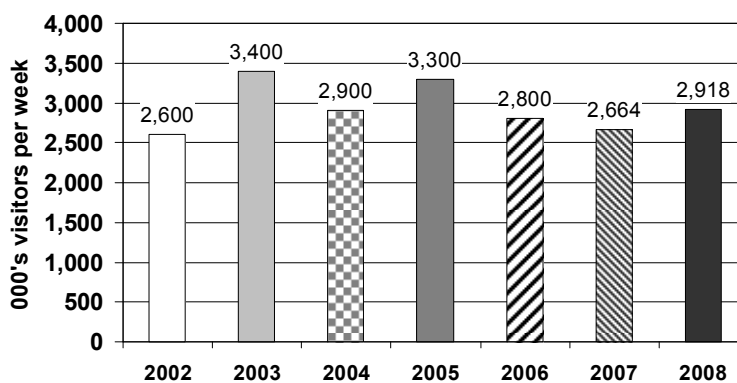
\* Addition of individual figures varies from total due to rounding of figures.

### Activity at Island Tourist Information Centres

During this quarter, almost 32,000 people visited the Island TIC's; this is an average of 2,900 per week. In line with the increase in visitors to the Island, visits to TIC's were up on the last two years. (+10% vs. last year; +4% vs. 2006.)

The average spend was £14.59, an increase of 32% versus last year which was itself a significant increase on 2006.

Number of visitors to TIC offices  
Q1 2008 vs. previous years



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

The Isle of Wight Tourism website attracted 165,500 visits in the quarter. Taking an average number per week to compare with the previous year, this is an increase of 2% versus 2007. This is a slower rate of increase than seen in recent years.

Occupancy statistics

The Isle of Wight occupancy statistics for winter 2008 will be issued in a separate bulletin.

Spring tourism bulletin (March 17<sup>th</sup> to July 13<sup>th</sup>, 2008)

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