

Tourism trends quarterly bulletin Visitor statistics for the peak season 2006: (Q3)

Introduction

This bulletin provides the key findings of the tourism monitor for the peak season which was July 17th - 3rd September 2006. Where possible comparisons are made with previous research.

Looking first at the broad picture of international travel, travel abroad by UK residents exceeded 11.2 million trips during July and August which is up very slightly versus 2005 (+1%) and 2004 (+2%). Visits to the UK were much more buoyant: these reached 5.2 million, which is an increase of 12% versus 2005, and 8% versus 2004. Growth was stronger to and from destinations outside Western Europe, although Western Europe continues to be the most important area for UK trips abroad and visits from overseas to the UK.

Focussing on the Isle of Wight, during the peak season there was a strong schedule of events to boost tourism on the Island. Cowes Week is the largest event (29th July - 5th August) and attracts around 80,000 visitors. Other key events include the Garlic Festival (19-20th August) which attracts around 20,000 visitors; the Cowes Powerboat festival at the bank holiday weekend which claimed to attract 65,000 spectators and the Westlife concert in July at Osborne House which had an audience of 10,000.

The peak season started with warm sunny weather however, for much of August it was dull but dry. During this season there have been several significant changes and the survey has recorded some new high and low points. Volume increases have been achieved in the highest yielding sectors and any reductions in the number of trips have been confined to lower yielding types of trip.

- Staying leisure trips reached a high point and, encouragingly, this has been driven by the important short breaks sector: domestic short breaks were up by 29% to just over 100,000. This increase was achieved without any reduction in the number of longer stay holidays/leisure trips.
- Staying trips by overseas residents increased by 9%.
- Staying VFR trips declined by 7%.
- Day trips declined significantly (-19%) and this holds true for both domestic residents and residents from abroad.
- Almost 130,000 new or lapsed visitors came to the Island on a leisure trip, two thirds of whom were staying visitors.
- *Add comment about visitors arriving by yacht.*
- Over half the leisure visitors (53%) went to an attraction, which was down 4 points on last year but in line with 2004. The majority (42%) visited an attraction charging an entrance fee.
- Consequently it is estimated that tourism contributed over £100 million to the economy during the peak season. This is an increase of 8% versus the peak season last year and this increase is due primarily to the increase in domestic short breaks.

N.B. Data included in this bulletin is taken from research conducted on board the six ferry routes to the Island. Isle of Wight Tourism and Medina Valley Centre supply additional data. The estimate of visitor nights arriving by yacht is based on data supplied by the individual harbours. International travel trends are taken from the IPS, a government survey.

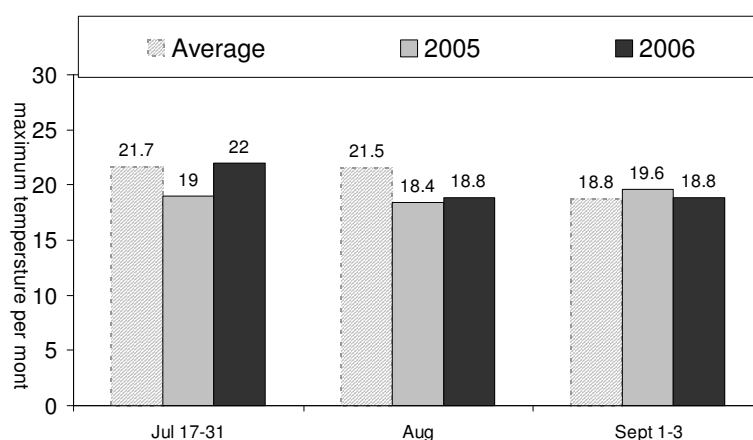
Weather

The second part of July was warm and sunny: the maximum temperature was a little above average but sunshine hours exceeded the average by 36% and last year by more than 180%.

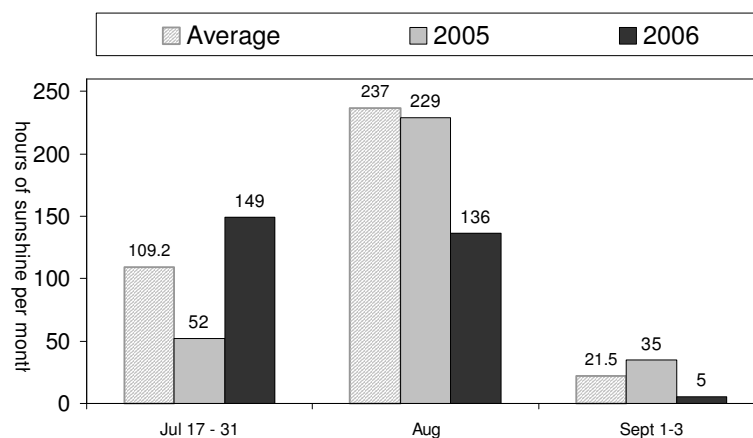
The weather was less favourable during August although it was an improvement on the very wet August of 2005. Maximum temperatures were just below the average; it was much drier than usual for the time of year but August was a very dull month with sunshine hours 40% down on the average and 2005.

The dull weather continued into the first few days of September. There was very little sunshine but the temperature and rainfall was in line with the average for the time of year.

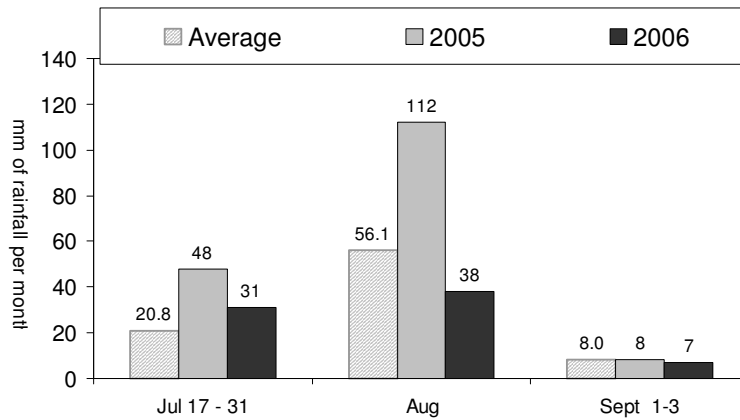
Maximum temperatures on the Isle of Wight
Peak season 2006 vs. long term average and last year



Sunshine on the Isle of Wight
Peak season 2006 vs. long term average and last year



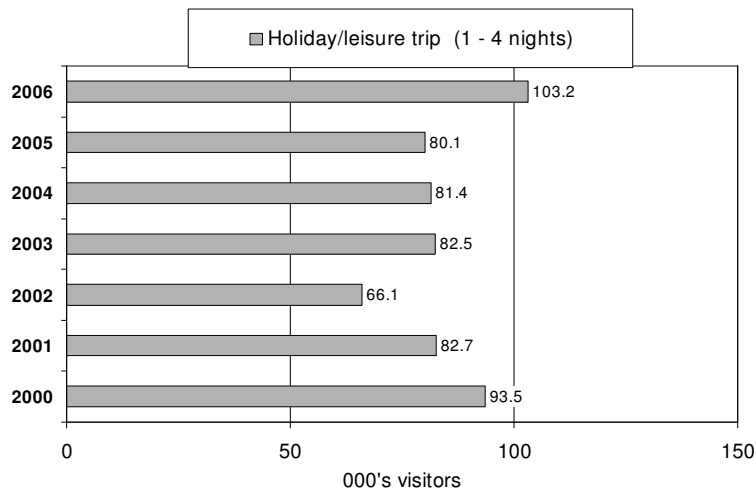
Rainfall on the Isle of Wight
Peak season 2006 vs. long term average and last year



Estimated number of domestic leisure short breaks

After three years when the number of short breaks to the Island remained fairly static, these increased dramatically this peak season. Short breaks (1-4 nights duration) were up by 29% to 103,000 trips which is the highest number recorded in the last 7 years.

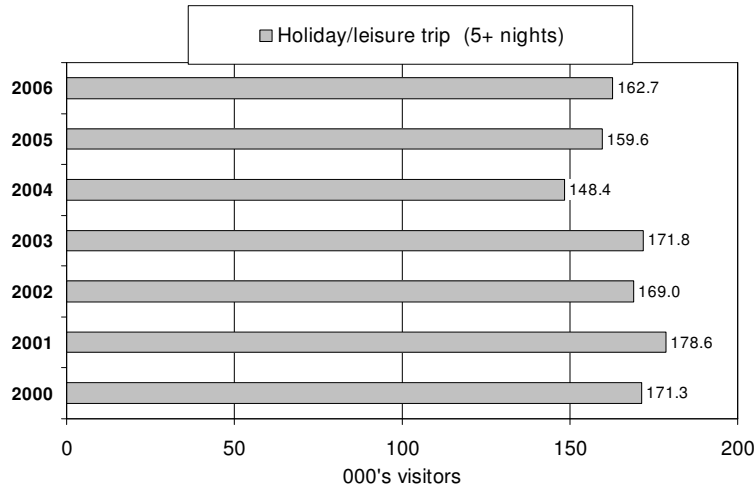
Estimated number of domestic short break leisure visitors
Peak season 2006 vs. previous years



Estimated number of longer stay domestic leisure visitors

Alongside the increase in short breaks, longer stay trips, of 5+ nights duration, reached 163,000 trips which was at a similar level to last year (+2%) and up significantly on 2004 (+10%). However these longer trips remain below the level seen prior to 2004.

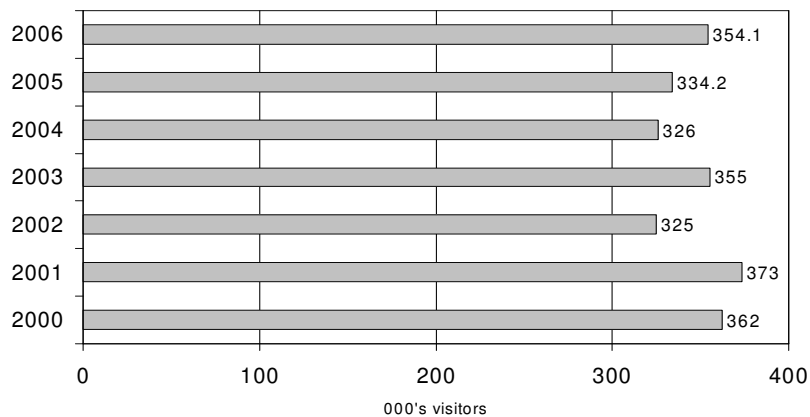
Estimated number of domestic longer stay leisure visitors
Peak season 2006 vs. previous years



Total number of domestic staying visitors

Taking all staying visits into account, the total number of staying visitors exceeded 350,000 this peak season which is up by 6% on last year and over 8% up on 2004. The volume is in line with that seen in 2003.

Estimated number of domestic staying visitors
Peak season 2006 vs. previous years



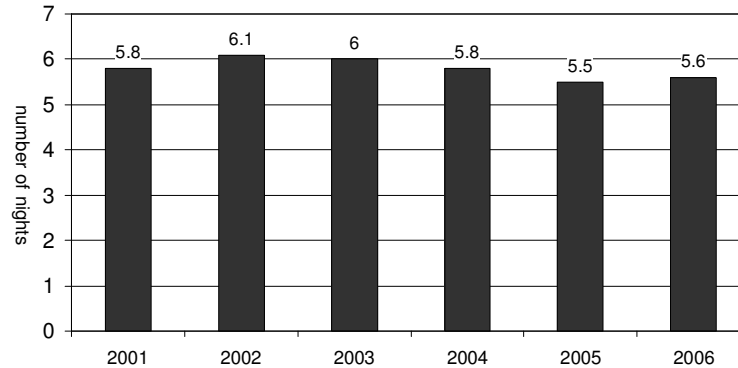
There were some changes in the overall mix of reasons for visiting the Island (staying trips):

- the increase in short breaks has already been highlighted
- VFR trips were down by 7%
- Combined leisure and business trips were down but an increase in pure business/work related trips more than compensated for this drop.

Average length of stay

The average length of all staying trips was 5.6 nights which is in line with the last couple of years. Factors which have influenced this have been the increase in short stays which averaged 2.7 nights and an increase in the length of VFR trips.

Average length of stay
Peak season 2006 vs. previous years



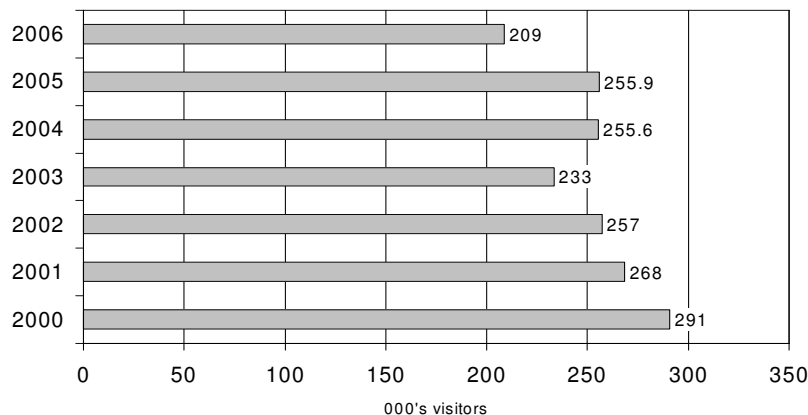
Estimated number of domestic day trips

The number of day visits to the Island declined dramatically; at just over 200,000 trips this is the lowest number recorded by this survey. This fall is due primarily to a drop in the number of day visits made by people taking day trips starting from home: these are down by 25%. This category of day trips makes up over half of domestic day trips.

Business and work related day trips also declined (-27%) but these account for less than 15% of the total day trips.

Day trips made by holidaymakers staying in the nearby mainland area increased slightly, as did VFR day trips.

Estimated number of domestic day visitors
Peak season 2006 vs. previous years

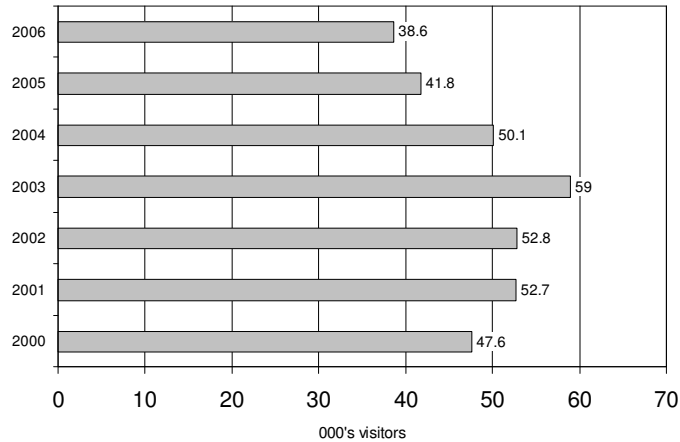


Estimated number of visits made by overseas residents

Visits made by overseas residents make up a small proportion (6.5%) of the total trips, even though spring and the peak season are the periods when visitors from abroad tend to come to the Island.

These were down by 8% and are at the lowest level recorded but this is due to a decline in day trips.

Estimated number of visits by overseas residents
Peak season 2006 vs. previous years



N.B. These estimates are based on small sample sizes which increases the error

Number of staying and day trips made by overseas residents: 2004-2006

The breakdown of trip type shows staying trips increased by 9% versus last year but remain at a similar level to that seen in 2004. Day trips have declined over the three year period.

000's trips	2004	2005	2006
Staying trips	28	23	26
Day trips	22	18	13

N.B. These estimates are based on small sample sizes

New versus repeat visits to the Island

Day and staying 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. (Only 4% of VFR visitors were on their first visit to the Island.)

At this time of year a very high proportion of visitors are repeat visitors: almost half were on their second visit in a 12 month period and a just over a fifth had visited fairly recently.

15% of leisure visitors were on their first visit to the Isle of Wight. This proportion was slightly higher amongst day visitors than short break and holiday visitors (18% vs. 13%).

In addition to these new visitors, the Island is successful at attracting lapsed visitors back: 14% of day visitors and 17% of short break/holiday visitors were visiting for the first time in the last 5 years.

	Leisure Day visitors (not VFR)	Short break/holiday visitors (not VFR)
First visit to Island	18%	13%
Visited before in last 12 months	47%	47%
Visited before 12 months to 5 years ago	21%	22%
Visited before but more than 5 years ago	14%	17%

Based upon these visitor patterns it is estimated that almost 130,000 new or lapsed visitors came to the Island during the peak season, which is a similar number to the peak last year. Two thirds of these visitors were higher value staying leisure visitors.

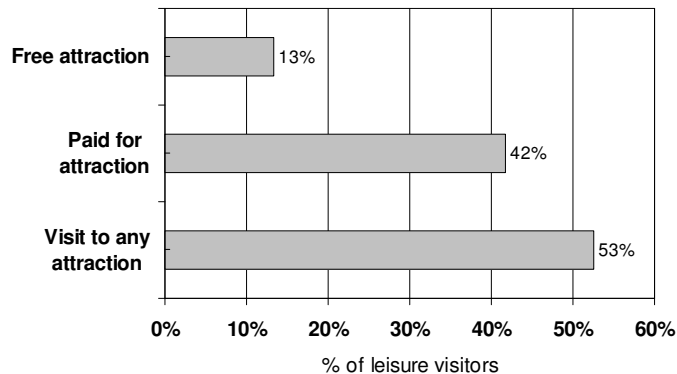
000's new/lapsed visitors	Leisure Day visitors (not VFR)	Short break/holiday visitors (not VFR)
First visit to Island	24	36
Visited before but more than 5 years ago	20	47

Visits to attractions

Over half the leisure visitors went to an attraction; the majority of these went to an attraction with an entrance fee (42%) whilst 13% visited a free attraction. A minority (3%) visited both.

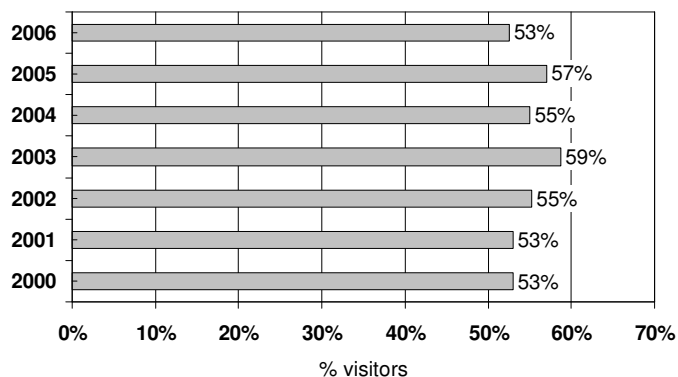
Predictably, those groups with children were much more likely to visit an attraction: 71% visited an attraction of some sort and 64% went to a paid for attraction.

Estimated visits to types of attractions
Peak season 2006



Looking at the trend over time, visits to attractions were estimated to be down by 4 points this year, but to be in line with 2004.

Estimated visits to any type of attraction
Peak season 2006 vs. previous years



Mode of transport

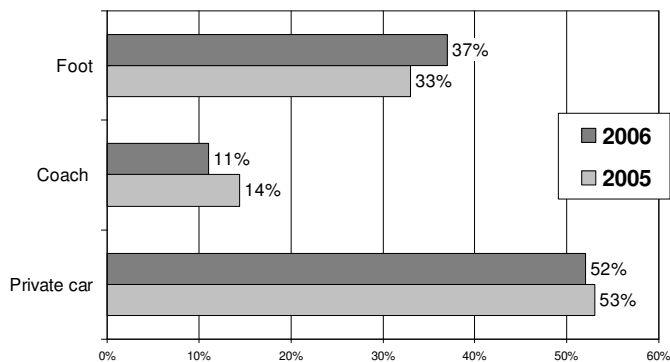
All visitors are asked how they travel to the mainland terminal and around the Island. Mode of travel on board the ferry is also recorded and used to estimate the overall split between visitors travelling as car, coach and foot passengers.

N.B. One year of historical data is available for comparisons.

Mode of travel on board the ferry

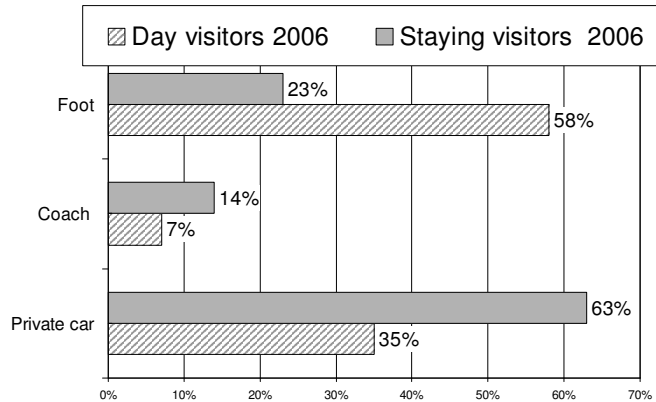
It is estimated that, during the peak season, over half the visitors (52%) travelled by car; this is consistent with travel by car last year. 37% travelled as foot passengers, which is a small increase on last year. A minority travelled by coach and the proportion has dropped slightly versus last year.

Mode of travel to/from the Island
Peak season 2006 vs. 2005



There are very significant differences between day and staying passengers in terms of mode of travel on board. Prevalence of travel as a foot passenger was much greater amongst day visitors whereas staying visitors were much more likely to travel by car.

Mode of travel to/from the Island
Peak season 2006

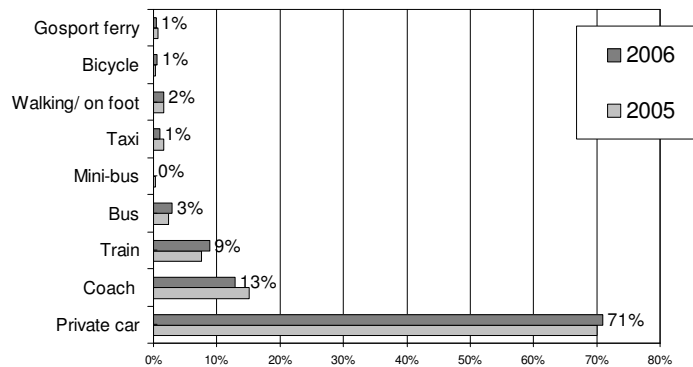


Mode of transport to the mainland terminal

The car was used for the majority of journeys to the mainland port (71%) which is in keeping with the peak season last year. Coach and train travel were used by a minority (13% and 9% respectively).

Continuing the trend noted in the spring, incidence of coach travel declined versus last year - although, in this peak period, the change is only minimal (down by 2%).

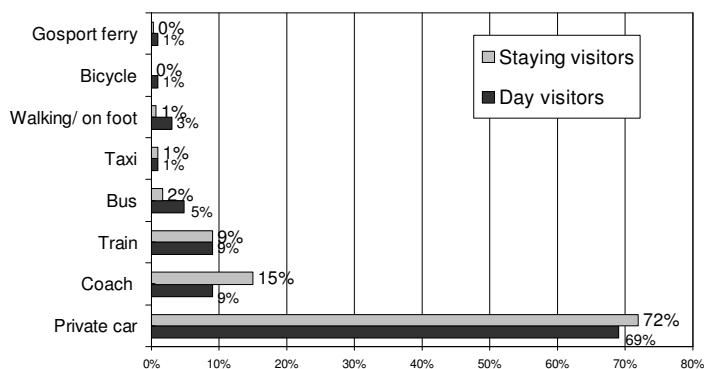
Transport used to travel to the mainland terminal
Peak season 2006 vs. 2005



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.

Choice of transport by day and staying visitors was very similar; it was only use of coaches where there was any notable difference and this was higher amongst staying visitors.

Transport used to travel to the mainland terminal
Day versus staying visitors
Peak season 2006

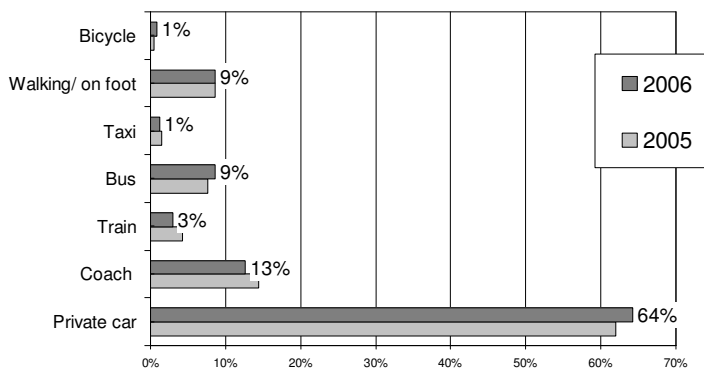


Mode of transport to travel around the Island

Once on the Island, the majority travelled around by private car, either their own or that of a relative, (64%). Walking, use of local buses and travel by coach all featured but at a fairly low level.

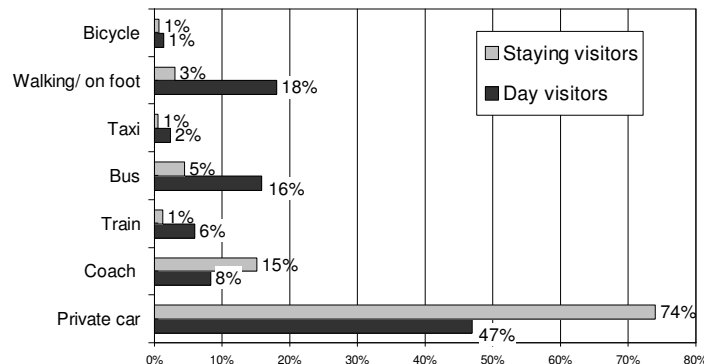
There are no significant changes since last year.

Transport used to travel around the Island
Peak season 2006 vs. 2005



Looking at the differences between day and staying visitors, most of those walking around or using the bus services were day visitors. Travel by private car and by coach was more popular amongst staying visitors.

Transport used to travel around the Island
Day versus staying visitors
Peak season 2006



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

Value of tourism

The value of tourism during this peak period is estimated at just over £101 million. This is an increase of 8% versus the peak summer season 2005 (excluding inflation). This increase is attributable to the significant increase in short breaks, plus the small increase in longer stay holidays.

Staying trips are worth £94 million, £84 million of which is from domestic staying trips; day trips account for another £7.5 million.

<u>Staying trips</u>	
All domestic staying trips	£84 million
All overseas staying trips	£10 million
<u>All staying trips</u>	<u>£94 million*</u>
<u>Day trips</u>	
All domestic day trips	£7 million
All overseas day trips	£0.5 million
<u>All domestic day trips</u>	<u>£7.5 million*</u>

* Addition of individual figures exceeds £100 million due to rounding of figures.

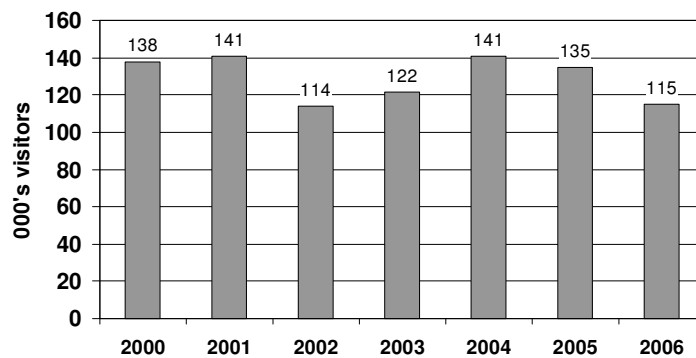
N.B. Spending by visitors arriving by yacht is not included in this calculation. It is planned to include this visitor segment in the future and research is underway to facilitate this.

Activity at Island Tourist Information Centres

There were 115,000 visitors to the Island TIC's during the peak season. This is a reduction of 15% compared to last year. Total visitor numbers continue to be affected by the closure of Ventnor TIC and the increasing tendency to seek information from the website (see below).

The average spend per head was £8.25 which is up from last year. Thus, although visitor numbers were down, revenue increased by 12%.

Number of visitors to TIC offices
Peak season 2006 vs. previous years



islandbreaks.co.uk website activity

There were 134,000 visits to the website during the peak season; this is up significantly versus last year continuing the trend seen throughout this year - the increase for this peak season is in the region of +34%.

Occupancy statistics

The Isle of Wight occupancy statistics for the peak summer season 2006 will be issued in a separate bulletin in late November.