

Tourism trends quarterly bulletin Visitor statistics for the autumn 2006: (Q4)

Introduction

This bulletin provides the key findings of the tourism monitor for the autumn, which was 4th September to 31st December 2006. Where possible comparisons are made with previous research.

Looking first at the broad picture of national and international travel during the autumn versus last year:

- There were 22.8 million trips abroad by UK residents during the period September to December, which is a small increase on 2005 (+2%).
- Conversely, domestic trips (1+ nights) taken within the UK declined by 4% to 29.6 million trips (September to November). Shorter trips combined with this reduced volume to create a 7% drop in bednights.
- Incoming visits to the UK made by overseas residents increased significantly: there were an estimated 10.8 million trips abroad which is up 9% on 2005 and +14% on 2004.

Looking at autumn on the Isle of Wight, the Island hosted the three main events of the autumn - all now well established. These are the Bestival music festival (early September), the cycling festival (late September) and White Air, the extreme sports festival which has been held in October since 1997 but will move to the end of the peak season in 2007.

An estimated 640,000 visits were made to the Island during the autumn, a small increase (+3%) versus last year. However the mix of visitors has changed this year:

- There was a marked change in the mode of travel to the Island with the importance of coach travel declining significantly. This fell from 23% of visits last autumn to 12% of visits this year. This decline was primarily staying visitors, contributing to the overall decline in staying visitors; coach travel is used very little by day visitors.
- Domestic staying leisure trips declined by 5% which is in line with the national decline in these trips for the period September to November.
- Domestic short breaks decreased versus the last two years (-19% versus 2005) but remain at the same level as in 2003.
- Staying VFR trips increased significantly (+26%) and were at the highest level recorded in the autumn. VFR day trips increased by a similar amount (+22%).
- Day trips reached 280,000, an increase of 17%, taking these back to the level last seen in 2003.
- An estimated 90,000 new or lapsed visitors came to the Island on a leisure trip, three quarters of whom were on a short break or holiday.
- Almost two fifths of the leisure visitors went to an attraction, this is an increase of 6 points on the last three years. Attractions charging an entrance fee were most popular.

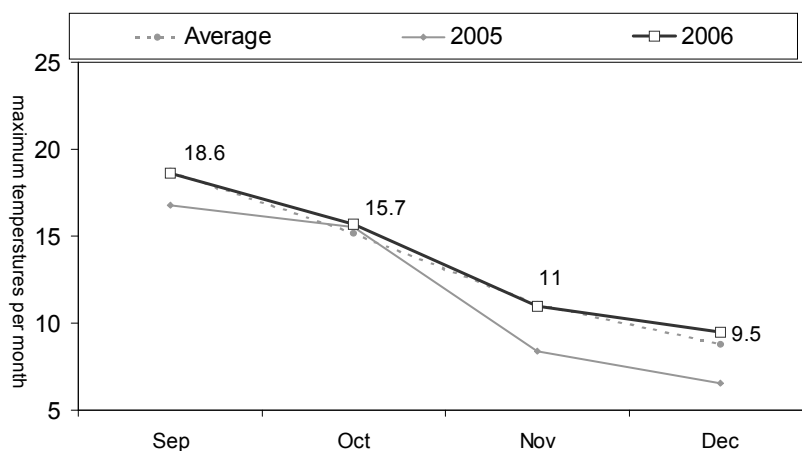
As a consequence of these changes, it is estimated that tourism contributed just over £80 million to the economy during the autumn. This is 16% lower than autumn last year (excluding inflation); nationally the value of staying visits declined by 7%.

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.

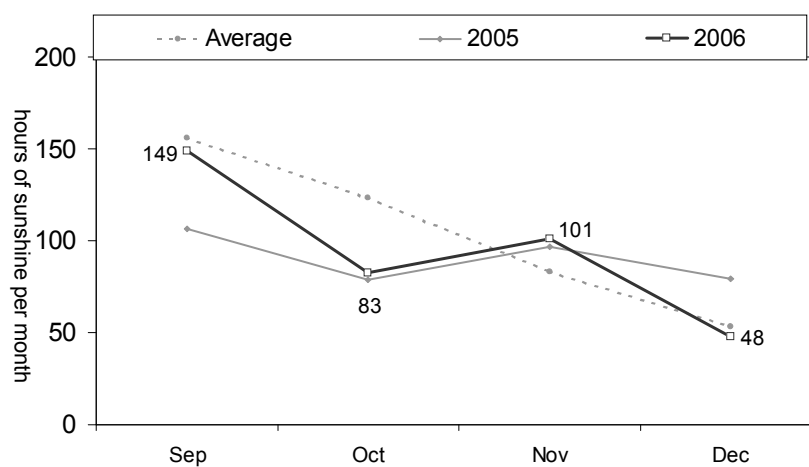
Weather

Following the heat wave of July then the unfavourable August weather, the weather in September was very much in line with expectations for the time of year. Maximum temperatures, sunshine hours and rainfall were all about average for the month. October was duller and wetter than the average for the month although maximum temperatures were as expected. November brought more mixed weather - more sunshine but rainfall also increased. In December sunshine hours and maximum temperatures were about average but it was extremely wet with rainfall 170% up on the norm for the time of year.

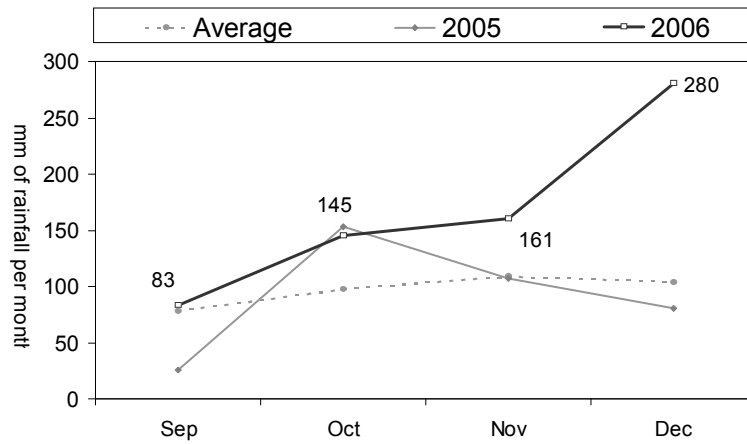
Maximum temperatures on the Isle of Wight
Autumn 2006 vs. 2005 and long term average



Sunshine on the Isle of Wight
Autumn 2006 vs. 2005 and long term average



Rainfall on the Isle of Wight Autumn 2006 vs. 2005 and long term average

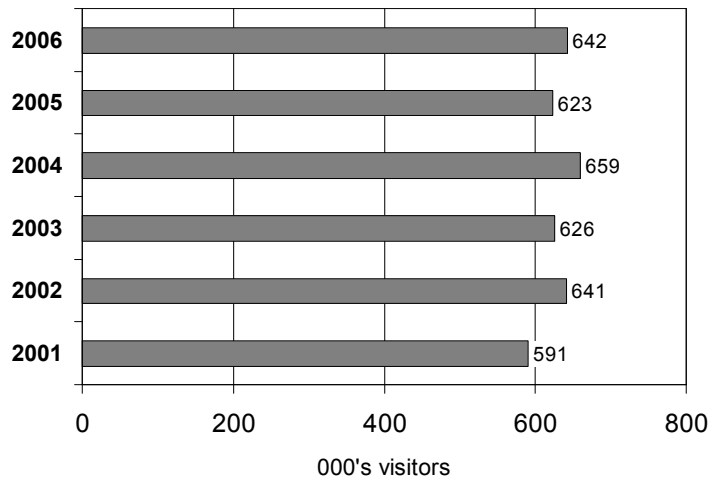


Weather data is supplied by Medina Valley Centre

Estimated number of domestic visitors

There were over 640,000 visitors to the Isle of Wight during autumn (arriving by ferry). This is at a similar level to previous years: up slightly versus last year (+3%) but down by a similar amount on 2004.

Estimated number of domestic visitors Q4 2006 vs. previous years



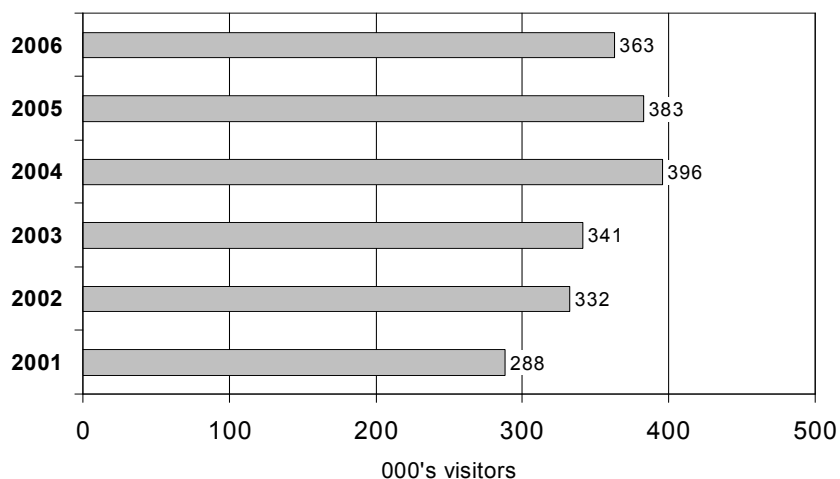
The make-up of this visitor base has changed somewhat versus previous years and these changes are highlighted in the following charts.

Estimated number of domestic staying visitors

The number of staying visitors has declined versus the last two years (-5% vs. 2005; -8% vs. 2004) but is up on 2003 (+6%) and earlier years.

The decline seen this year should be set in the context of the national trend in domestic staying visits: domestic staying trips taken in the UK were down by a similar degree, -4%, for the period September to November (the most recent data available).

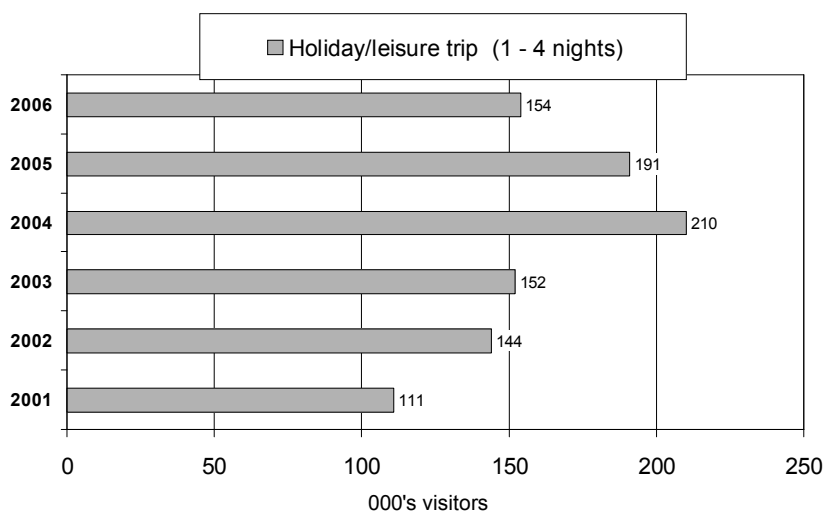
Estimated number of domestic staying visitors
Q4 2006 vs. previous years



Estimated number of domestic leisure short breaks

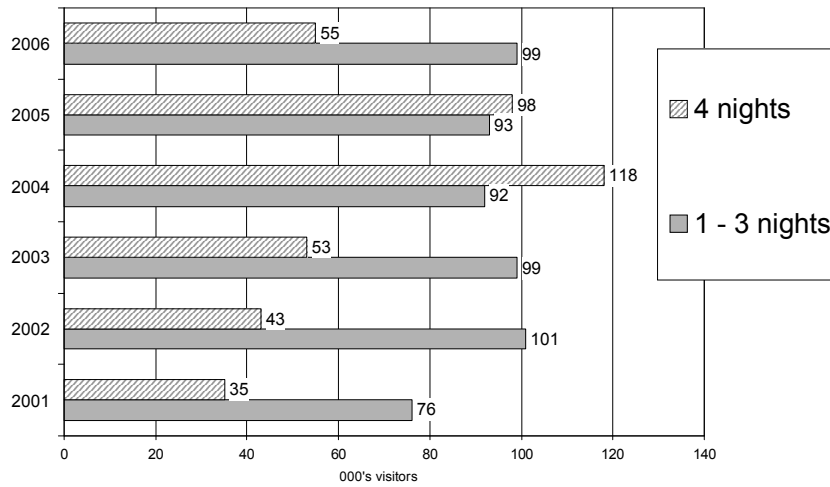
There were over 150,000 short leisure breaks to the Isle of Wight this autumn; these made up just over 40% of staying visits. The number of these trips is down versus the last two autumns (-19% vs. 2005; -27% vs. 2004) but level with 2003 and up on earlier years.

Estimated number domestic short break leisure trip visitors
Q4 2006 vs. previous years



This decline is wholly attributable to a decline in 4 night stays; 1 - 3 night stays have remained at a fairly constant level over the last 5 years.

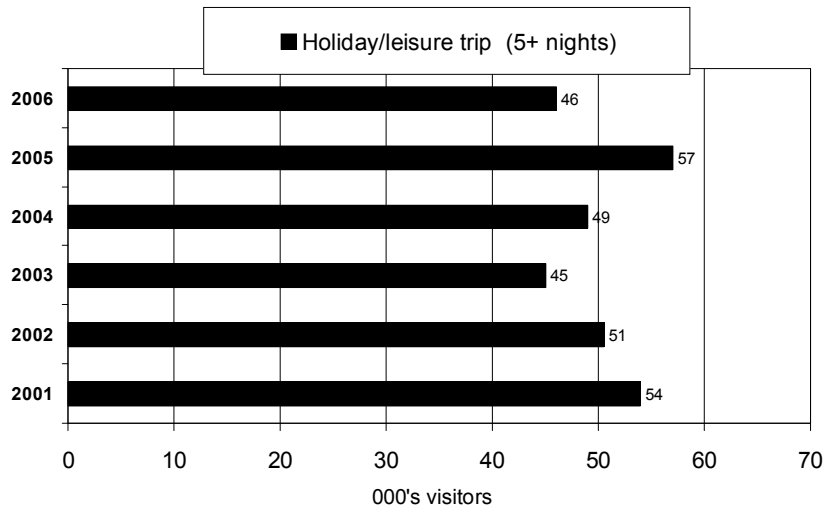
Estimated number domestic short break leisure trip visitors
Q4 2006 vs. previous years



Estimated number of longer stay domestic leisure visitors

Longer stay trips, of 5+ nights duration, are much less important at this time of year, accounting for 13% of staying trips only. There were 46,000 of these, which is around 10,000 trips down on last year but at a similar level to 2003 and 2004.

Estimated number domestic longer stay leisure trip visitors
Q4 2006 vs. previous years



Other types of domestic staying trips

At this time of year trips to visit friends and relatives make up a significant proportion (33%) of the total staying trips. These increased by 26% versus last year and are up by a similar amount versus each year since 2002.

	2002	2003	2004	2005	2006
000's	97	97	87	94	118

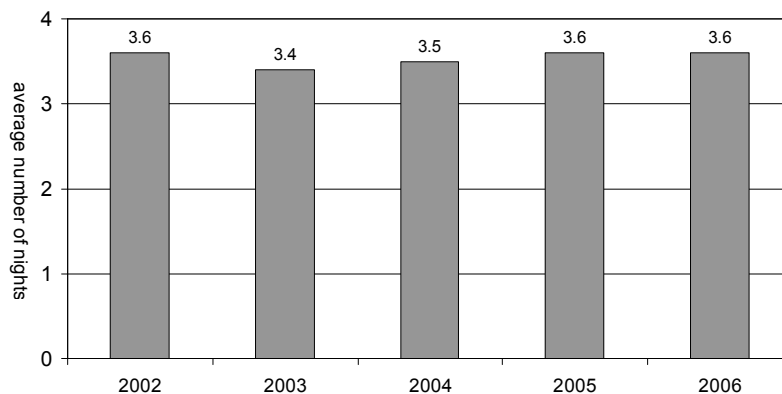
Business trips account for only a small proportion of staying trips in the autumn (10%) but these did increase slightly versus last year (+7%).

Average length of stay

The average length of all staying trips was 3.6 nights, which is level with last year and very similar to the previous few years. It has already been noted that short breaks have become slightly shorter than last year; this has been evened out by slightly longer 5+ night holidays and longer business trips.

The number of domestic visitor bednights spent on the Island during the autumn is estimated at 1.3 million; this is 6% below the number last autumn. This decline is similar to the annual change in UK domestic bednights, which was down by 7% versus 2005 for the period September to November.

Length of stay
Q4 2006 vs. previous years

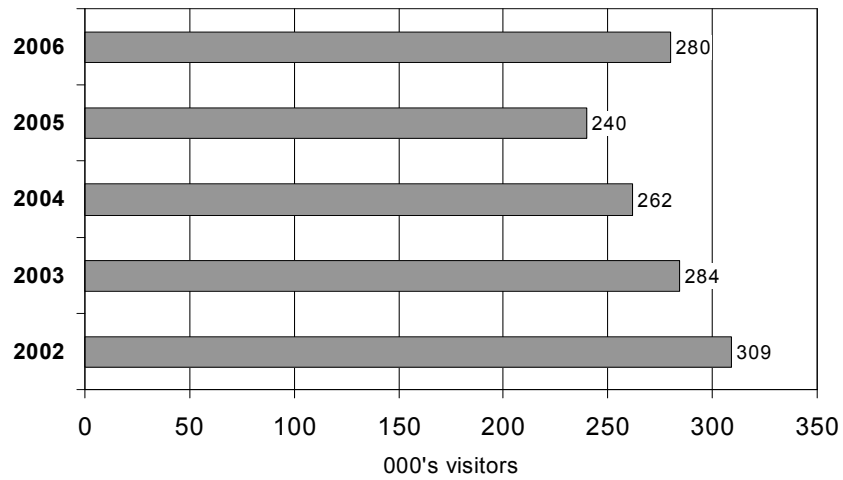


Estimated number of domestic day trips

After a dramatic decline in day trips recorded in the peak season, this quarter has seen a significant recovery. There were 280,000 day trips this autumn which is an increase of 17% on last year; this halts the three year downward trend in day trips and restores these back to the volume seen in 2003.

Approximately two fifths of these day trips were business trips (103,000) and these increased by 29% versus last year. Another important category is leisure day trips: these increased by 44% almost reaching 100,000 (35% of day trips). Finally VFR day trips numbered 65,000, which was an increase of 22% on last year.

Estimated number of domestic day visitors
Q4 2006 vs. previous years

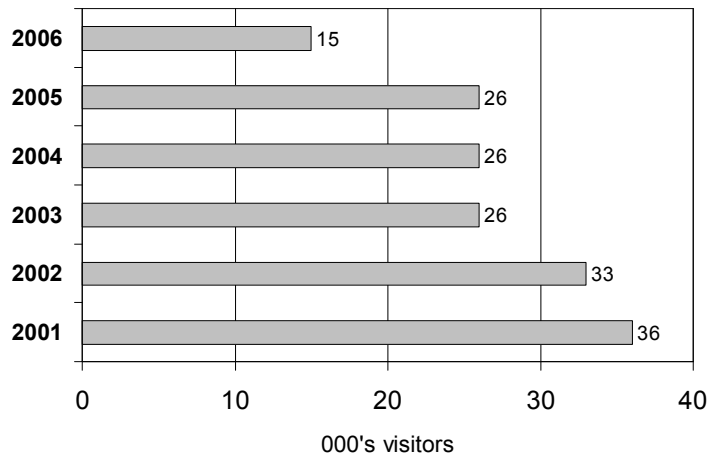


Estimated number of visits made by overseas residents

Visits made by overseas residents are relatively insignificant at this time of year, the important periods for these visitors are spring and the peak season. It is estimated that 15,000 visits were made by overseas residents although the base for estimating this number is small.

This is estimated to be a reduction of 10,000 visits versus the last three years which, if correct, means these visits are at the lowest level recorded in autumn by this survey.

Estimated number of visits by overseas residents
Q4 2006 vs. previous years



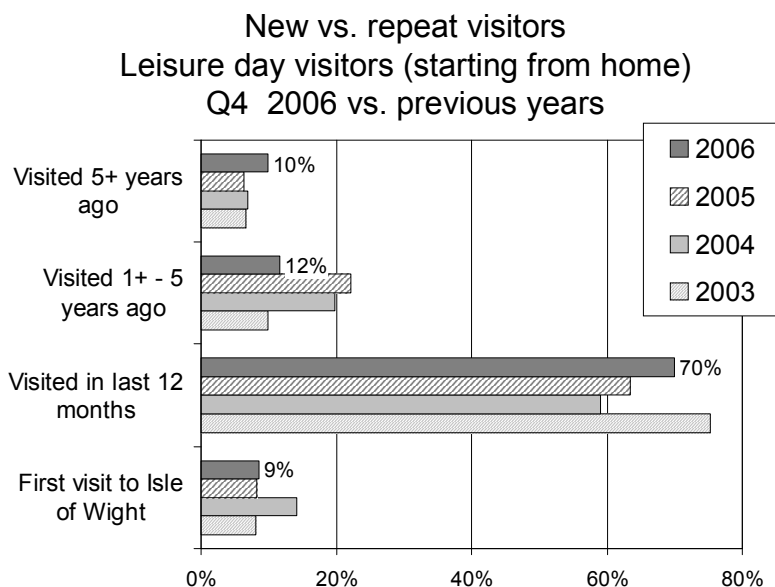
NB. Estimates of visits by overseas residents based on a small sample

New visitors versus repeat visitors to the Isle of Wight

Day and staying leisure visitors are asked when they last went to the Isle of Wight. The following data excludes those visiting friends and relatives as these are, by definition, likely to be frequent visitors. (Only 3% of all VFR visitors were on their first visit to the Island.)

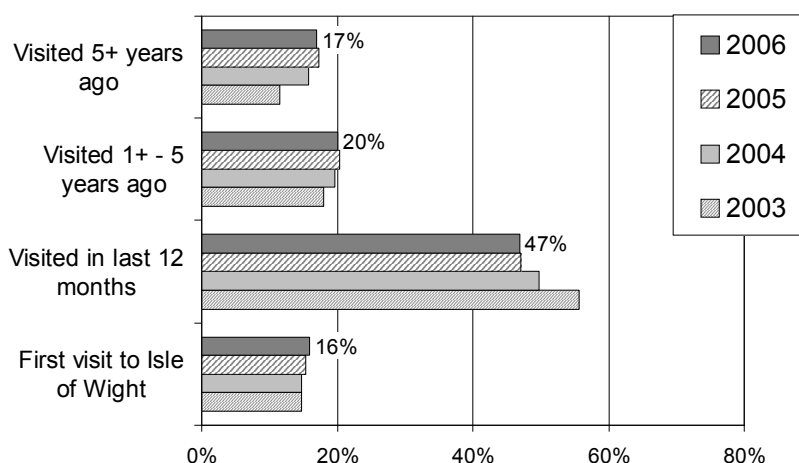
Leisure day visitors: new visitors to the Island are few and far between at this time of year: only 9% were on their first visit, in line with last year. Another 10% had returned to the Island after a break of 5 or more years, which is a slight increase on previous years.

The vast majority were repeat visitors with 70% on their second visit in a 12 month period and 12% who had visited fairly recently. At this time of year, the trend over the last few years has been towards more regular visiting.



Leisure staying visitors: new visitors to the Island were more numerous amongst leisure staying visitors: a third were either on their first trip to the Island (16%) or returning after 5+ years (17%).

New vs. repeat visitors
Leisure staying visitors Q4 2006 vs. previous years



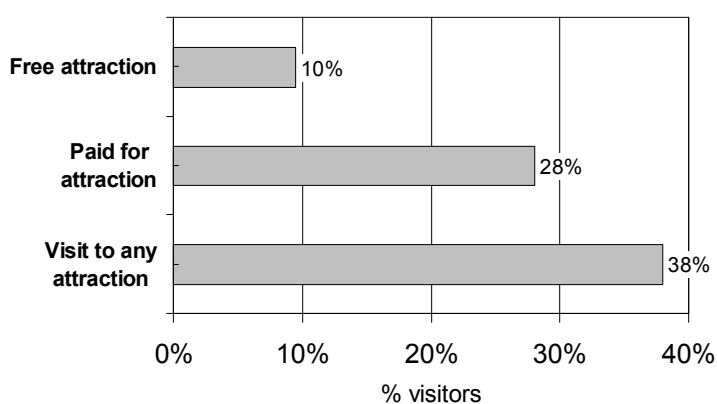
Based upon these visitor patterns it is estimated that almost 90,000 new or lapsed visitors went to the Island during autumn. Almost three quarters of these visitors were the higher value staying leisure visitors.

	Leisure day visitors (not VFR)	Short break/holiday visitors (not VFR)
000's new/lapsed visitors	24	65

Visits to attractions

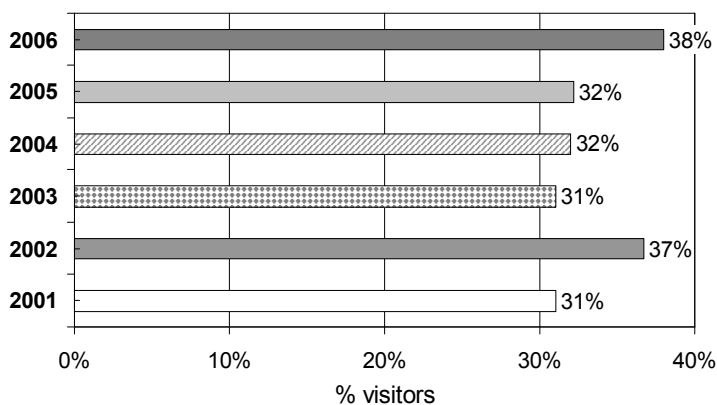
Almost two fifths of leisure visitors went to an attraction; those with an entrance fee were most popular, visited by 28%, whilst 10% visited a free attraction.

Estimated visits to types of attractions
Q4 2006



Looking at the trend over time, after three years of little change in the proportion visiting attractions, this autumn saw a 6 point increase.

Estimated visits to any attractions
Q4 2006 vs. previous years



Mode of transport

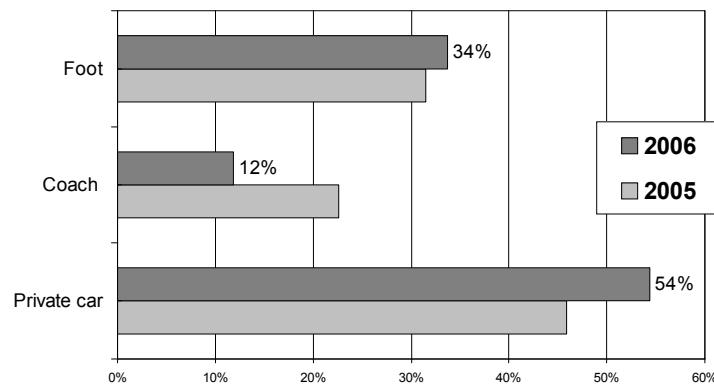
All visitors are asked how they travel to the mainland terminal and around the Island. Mode of travel on board the ferry is also recorded and used to estimate the overall split between visitors travelling as car, coach and foot passengers.

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

Mode of travel on board the ferry

Travel by private car was the most popular way to get to and from the Isle of Wight: over half the visitors (54%) travelled by car. This is an 8 point increase versus last year. The most significant change versus autumn last year is the dramatic decline in travel by coach: propensity to visit by coach almost halved from 23% to 12%. Travel on foot remains the second most popular mode accounting for about a third of travel and is consistent with last year.

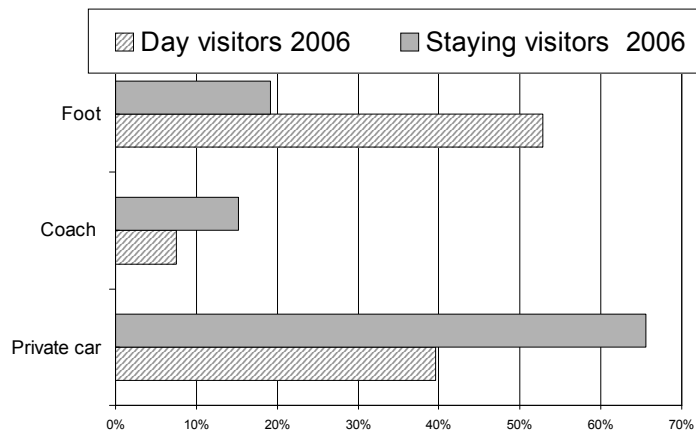
Mode of travel to/from the Island
Autumn 2006 vs. 2005



Mode of travel on board varies enormously between day and staying visitors:

- Staying visitors were much more likely to travel by car with two thirds opting to travel this way. This proportion is up 15 points on autumn last year. 40% of day visitors travelled by car, a figure which is in line with last year.
- Very few staying visitors came by coach (15%) and this has halved from 32% in autumn last year. Coach travel is used very little by day visitors.
- 17% of staying visitors were foot passengers whereas over half of day visitors came on foot; both proportions have remained fairly static versus last year.

Mode of travel to/from the Island Autumn 2006

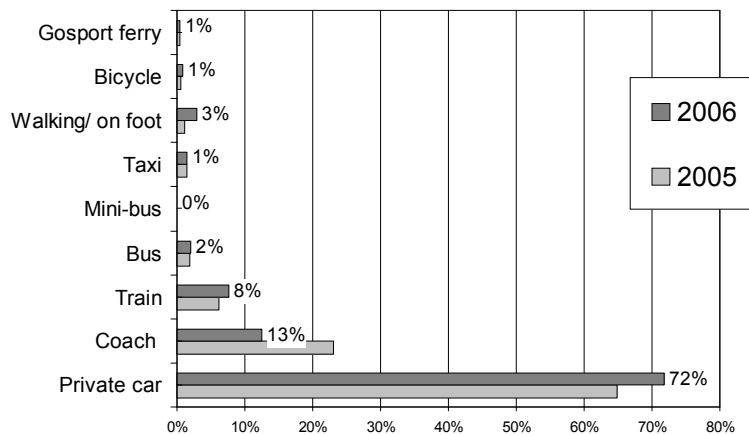


Mode of transport to the mainland terminal

Choice of travel to get to the mainland terminal follows the pattern seen in the mode of travel on board. The car was used for the majority of journeys to the mainland port (72%) and the tendency to travel by car has increased since last year. Coach and train travel were used by a minority (13% and 8% respectively).

In line with previous reporting periods this year, the incidence of coach travel declined by 10 points versus last year.

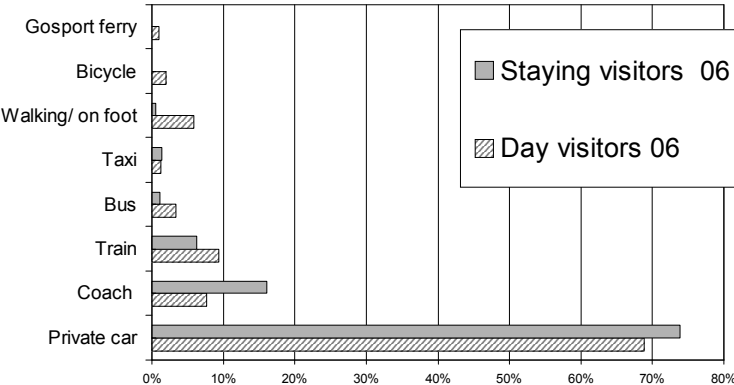
Transport used to travel to the mainland terminal Autumn 2006 vs. 2005



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 to the mainland terminal by day and staying visitors was fairly similar although staying visitors were more likely to use the car and coach. Use of the train and walking or cycling to the terminal was higher amongst day visitors.

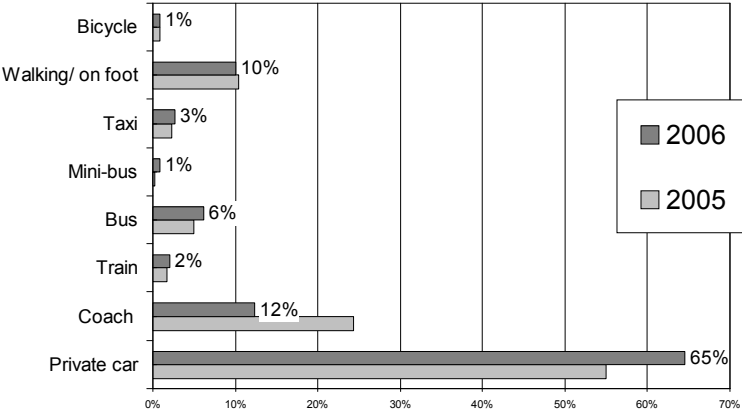
Transport used to travel to the mainland terminal
Day versus staying visitors
Autumn 2006



Mode of transport to travel around the Island

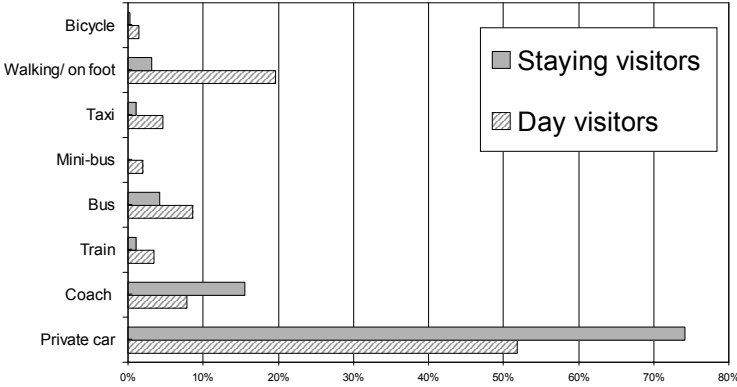
On reaching the Island, the majority travelled around by private car, either their own or that of a relative (65%) and this has increased at the expense of travel by coach since last year: coach travel around the Island was down to 12% from 24%. One in ten said they were walking; use of local buses, train and taxi all featured at very low levels.

Transport used to travel around the Island
Autumn 2006 vs. 2005



Looking at the differences between day and staying visitors, the majority of those walking, cycling or using the bus services, the train or taxis were day visitors. Staying visitors had a higher propensity to travel by private car and coach.

Transport used to travel around the Island
Day versus staying visitors
Autumn 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 autumn is estimated at £81 million. This is a decrease of 16% versus the autumn 2005 (excluding inflation). This decrease has been caused by the changing mix of visitors; the increase in value derived from day visitors has not compensated for the decline in value from short break and holiday visitors. Value derived from overseas residents is also down.

Staying trips are worth £71 million, £68 million of which is from domestic staying trips; day trips account for another £9.7 million.

<u>Staying trips</u>	
All domestic staying trips	£68 million
All overseas staying trips	£3 million
<u>All staying trips</u>	<u>£71 million*</u>
<u>Day trips</u>	
All domestic day trips	£9.5 million
All overseas day trips	£0.2 million
<u>All domestic day trips</u>	<u>£9.7 million*</u>

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.

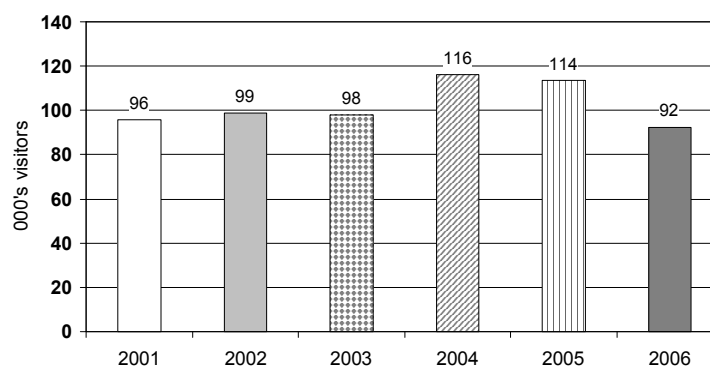
Activity at Island Tourist Information Centres

There were 92,000 visitors to the Island TIC's during the autumn, which is a reduction of 19% versus the last two years, however visits to TIC's in autumn last year were boosted significantly by sales of tickets to a Westlife concert.

The average spend per head was £7.02.

The drop in visits to TIC's is in line with the decline in the types of visitors who are most likely to visit the TIC's - staying visitors taking holidays and short breaks on the Island. More influential is the on-going trend towards seeking information from the website in advance of visiting the Island, which is increasing significantly over time (see below).

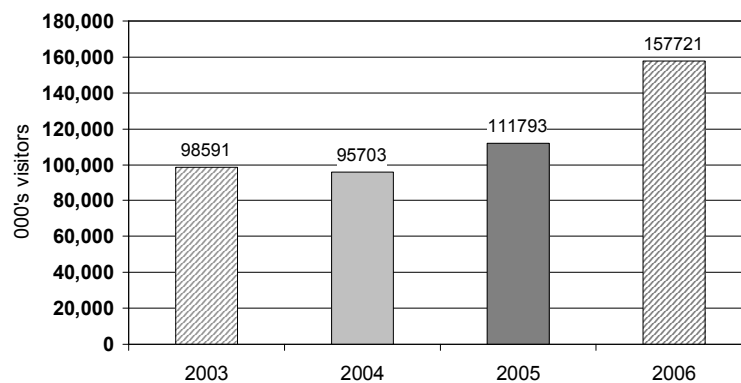
Number of visitors to TIC offices
Q4 2006 vs. previous years



islandbreaks.co.uk website activity

There were 158,000 visits to the website during the autumn; this is a dramatic increase on previous years: up by over 40% versus last year and 60% up on the previous two years.

Number of visitors to Isle of Wight Tourism website
Q4 2006 vs. previous years



Occupancy statistics

The Isle of Wight occupancy statistics for autumn 2006 will be issued in a separate bulletin, this is due out at the end of April.