

## Tourism trends quarterly bulletin Visitor statistics for the Autumn 2009: (Q4)

### Introduction

This bulletin provides the key findings of the tourism monitor for the autumn period, 7<sup>th</sup> September to 31st December 2009. Where possible, comparisons are made with previous research to provide the longer term trend in tourism performance on the Isle of Wight however these are affected by the timing of the late August bank holiday which fell on the last day of August this year. Consequently, this autumn period is shorter than usual and a full 6 days shorter than last year. Comparisons with the last two years are therefore based on a weekly average rather than the actual volume to make these more meaningful.

Looking back to autumn 2008, the global financial crisis had taken hold and, with uncertainty ahead, the impact on consumer confidence was severe; this sank to an all time low of 47<sup>1</sup> in autumn 2008. Through 2009 consumer confidence has been rising steadily and in autumn was hovering around 70 – a big improvement on last year but below 2007 and earlier years.

Before looking specifically at tourism on the Isle of Wight, it is relevant to look at how international and national travel has been affected by the economic situation. The data suggests that travel habits have changed somewhat with a proportion of UK residents opting to travel in the UK rather than abroad. In addition, the effects of the recession continue to be felt globally and affect international travel.

**International travel:** during the autumn, (September to December<sup>2</sup>), in line with recent years, the international travel market contracted. Visits to the UK by overseas residents decreased by 2% versus 2008 to 9.3 million trips; this was a reduction of 14% vs. 2007. Likewise the number of UK residents taking trips abroad decreased; at 18.8 million trips this was down by 9% on 2008 and 16% down on 2007.

**Domestic travel:** in contrast to the international market, the domestic market<sup>3</sup> saw considerable expansion. The number of overnight trips was up by 9% and the number of bednights by 6%. Much of this growth was due to holidays/short breaks which increased by 16% versus last year. N.B. data is available for September to November only.

Turning to the Isle of Wight, autumn events started with the Bestival music festival in early September and, unlike last year, the weather was good for this event. Also in September there was the classic car show and the cycling festival, a 9 day event, followed by the autumn walking weekend in October.

Given the fragile recovery from the recession, the Island has done well to achieve growth in some areas and has kept in line with the growth areas seen nationally.

It is estimated that there were almost 610,000 visits to the Island during the autumn; the weekly average is 1.5% up on last year but 9% below 2007. There have been changes to the mix of visitors coming to the Island.

- Leisure travel to the Island was buoyant with both holidays (5+ nights) and short breaks (1 – 4 nights) increasing this year. These were up by 16% (both sectors combined) versus the weekly average last year which is in line with the growth in this market nationally. The majority of these were short breaks and these increased by 11% vs. the weekly average last year; holidays of 5+ nights were up by a third.
- Staying VFR trips were level with last year at 100,000 whereas nationally staying VFR trips were down by 2%.
- Staying business trips were down significantly on last year – these were more down by than a third vs. the weekly average last year. Nationally, staying business trips increased.
- Total domestic day trips: after three years of growth, this market was level with last year (+1%) at 288,000, leisure day visits did increase significantly (+23%) but this was balanced out by a fall in business trips.
- It is estimated that in excess of 90,000 new or lapsed visitors came to the Island on a leisure trip. This is almost double the number of new/lapsed visitors seen last year suggesting that the Island has been particularly successful in attracting new visitors at a time when UK residents have been re-evaluating their holiday plans. 70% of these were the higher value short break/holiday visitors.
- It is estimated that tourism contributed £80 million to the Island economy, an increase in the weekly average of 8% due primarily to the increase in holidays and short breaks. This is significantly ahead of the 2% increase in tourism spend nationally (September to November).

N.B. Data is taken from research conducted on board the six ferry routes to the Island. Isle of Wight Tourism. Medina Valley Centre and Shanklin weather station supply additional data.

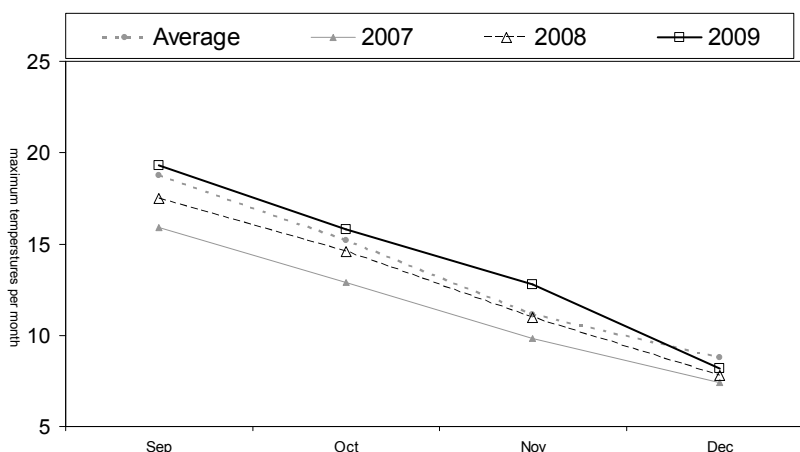
1 Nationwide consumer confidence index; 2 International travel trends are taken from the IPS, a government survey: figures shown are not seasonally adjusted; 3 National travel trends are taken from UKTS, a survey conducted on behalf of Visit Britain.

## Weather

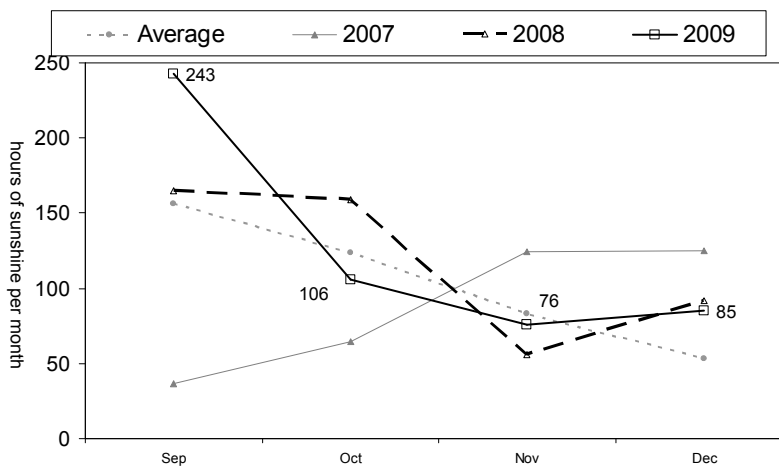
Autumn started well with a very sunny and dry September: this was in the top five sunniest Septembers in the last quarter century, making this a good time for spontaneous day trips and short breaks:

- Maximum temperatures were slightly above the long term average from September to November but fell just below in December;
- After the sunny start, sunshine hours fluctuated around the norm in October and November, December saw above average sunshine;
- Rainfall fluctuated through the autumn. In keeping with the sunny weather, September was much drier than average; October was typical for the time of year but November was very wet with more than double the average. Wet weather continued into December with rainfall 50% up on the average, even though it was also sunny for the time of year.

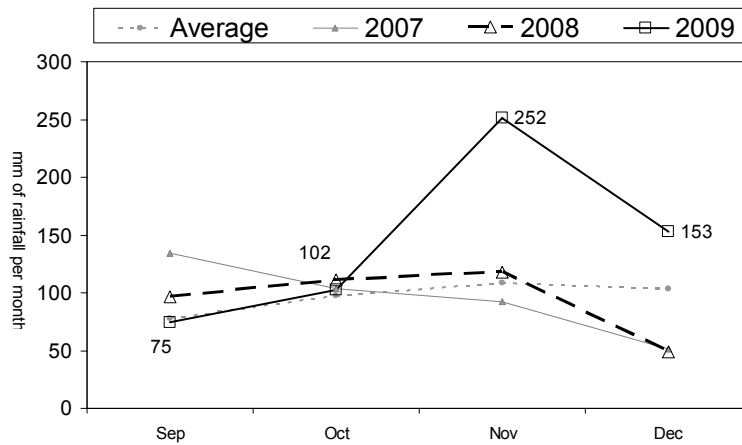
Maximum temperatures on the Isle of Wight  
Autumn 2009 vs. 2008, 2007 and long term average



Sunshine on the Isle of Wight  
Autumn 2009 vs. 2008, 2007 and long term average



Rainfall on the Isle of Wight  
Autumn 2009 vs. 2008, 2007 and long term average

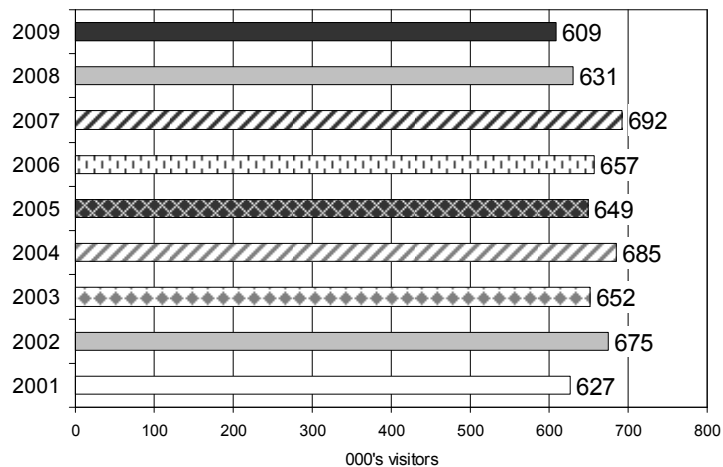


Weather data is supplied by Medina Valley Centre and Shanklin Weather Centre

**Estimated number of visitors to the Isle of Wight**

It is estimated that almost 610,000 visits were made to the Isle of Wight during autumn 2009. Adjusting for the shorter quarter, this is a weekly average of 36,700 visits which is just above the weekly average last year (+1.5%) but a fall of 9% versus the weekly average seen in 2007.

Estimated number of total visitors  
Q4 2009 vs. previous years

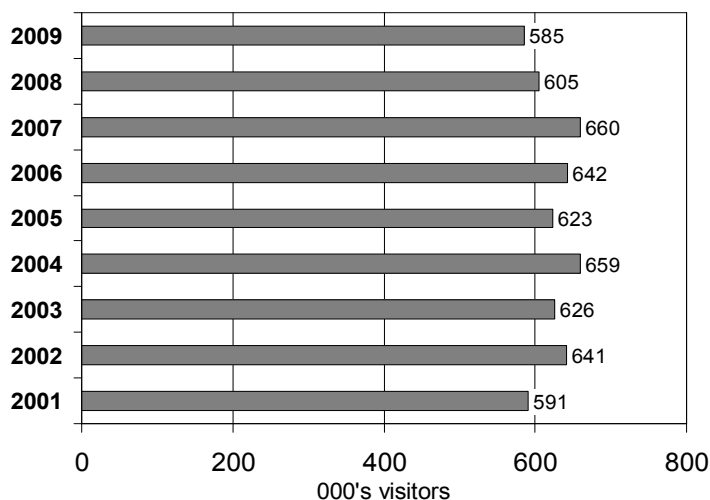


Almost all these visitors were domestic visitors, 96%, which is the norm at this time of year.

### Estimated number of domestic visitors

For the first time since 2001, the number of domestic visitors dipped under 600 thousand however this is due to the shorter quarter length. Average weekly visits were up by 2% versus 2008, at just over 35,000 but were down by 8% on the high point seen in 2007 (based on the weekly average).

Estimated number of domestic visitors  
Q4 2009 vs. previous years



Domestic visitors are divided into staying and day visitors. The table below shows the balance between the two segments over recent years. Last year there was a marked decline in the proportion of staying visitors and this year the balance has remained in line with autumn 2008. This means that there were roughly equal numbers of staying and day visitors during the autumn period.

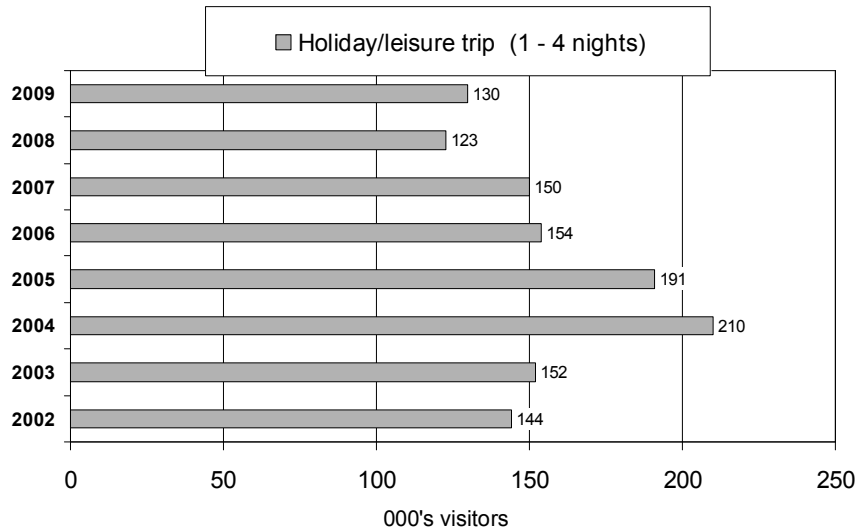
	Staying visitors %	Day visitors %
2009	51%	49%
2008	51%	49%
2007	57%	43%
2006	56%	44%

The reasons for visiting on staying and day trips are analysed in the following sections.

### Estimated number of domestic leisure short breaks

The autumn period is an important time for the short break market: short leisure stays accounted for 44% of all domestic staying visits. There were an estimated 130,000 short breaks which is up on the low number seen in autumn last year. This equates to an average of 7,800 which is an increase of 11% on last year. It is also the first year an increase has been recorded since 2004 although the number is down by 11% on 2007.

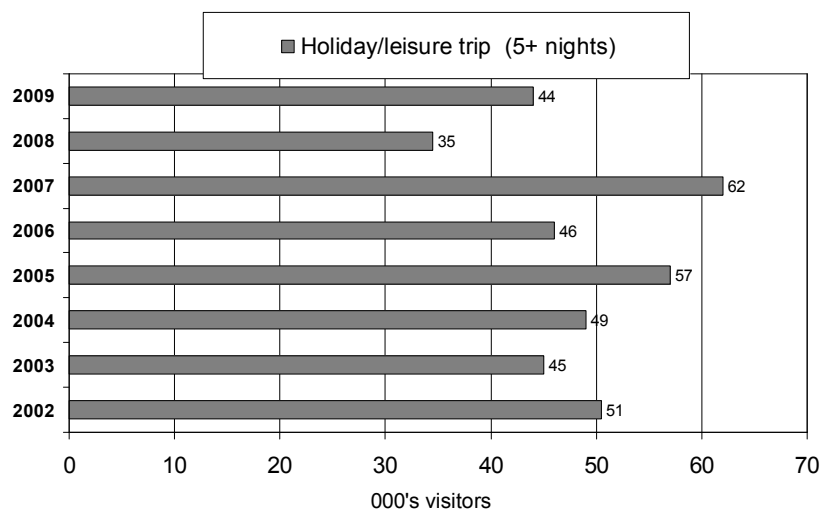
Estimated number of domestic short break leisure trip visitors  
Q4 2009 vs. previous years



### Estimated number of longer stay domestic leisure visitors

Longer stay holidays (5+ nights) are less important in the autumn due to the relatively smaller number taken; these accounted for 15% of domestic staying trips. However with an average duration of almost 7 nights, they remain an important income source for some accommodation providers. The number of trips has fluctuated over recent years (partly due to the small base size); there were an estimated 44,000 longer holidays, with an average weekly volume of 2,700. This is an increase of 36% on the low point seen last year. It remains significantly below 2007 (-26%) but is in line with 2006.

Estimated number domestic longer stay leisure trip visitors  
Q4 2009 vs. previous years



### **Other types of domestic staying trips**

Visits to friends and relatives are an important sector at this time of year: these accounted for a third (34%) of all domestic staying trips. There were just over 100,000, an average of 6,100 a week which, after adjusting for the quarter length, is level with last year. These visits are down significantly on 2006 and 2007 but at a similar level to previous years.

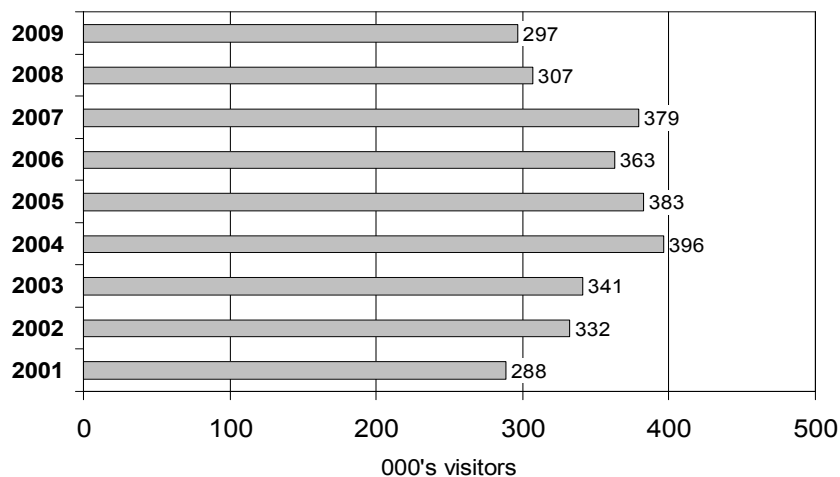
	2002	2003	2004	2005	2006	2007	2008	2009
000's	97	97	87	94	118	112	105	101

Staying business trips are relatively few in number during autumn, at less than 20,000 or an average of 1,100 per week (business plus combined business and leisure trips), these were down on the last two years.

### **Estimated number of domestic staying visitors**

The total number of domestic staying visitors is estimated at just under 300,000, a weekly average of 18,000. This is an increase of 2% on autumn last year but remains significantly lower than 2007 (-19%).

Estimated number of domestic staying visitors  
Q4 2009 vs. previous years

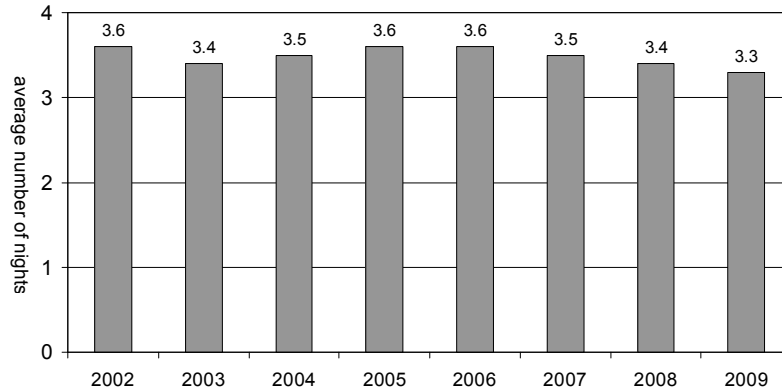


**Average length of stay**

The average length of stay was in line with last year at 3.3 nights although the long term trend emerging is slowly downwards. This is the third year that small reductions have occurred.

The estimated demand resulting from this is just under one million domestic visitor bednights on the Island; if visits to friend and relatives are excluded, an estimated 720,000 bednights in commercial accommodation were needed.

Length of stay  
Q4 2009 vs. previous years

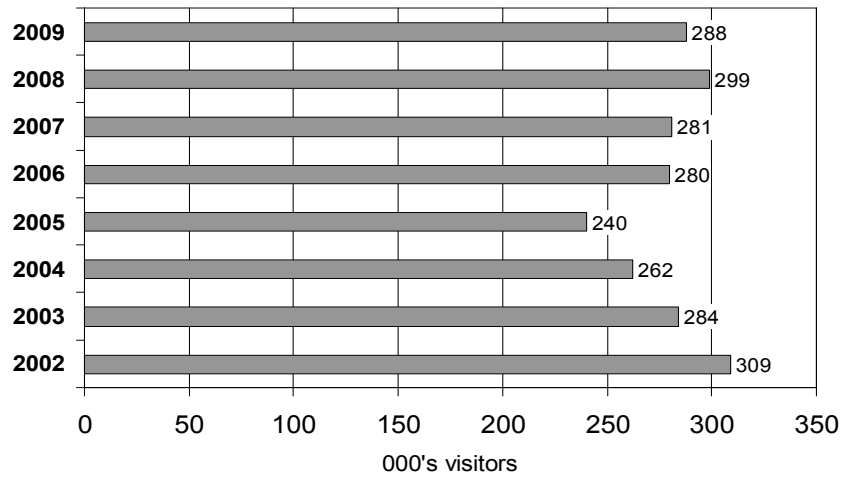


**Estimated number of domestic day trips**

There were approximately 290,000 day trips during the autumn, an average of 17,400 a week. This is very similar to last autumn (+1%) and an increase of 6% vs. 2007. After three years of declining numbers between 2003 and 2005, this is the third year that day visits have increased.

Leisure day visits (LDV) were the largest segment of day trips – there were 113,000, a weekly average of 6,800 which is an increase of 23% on last year and level with 2007. At this time of year the majority of LDV's are trips starting from home (70%) and this sector increased by 18% vs. last year. Business day trips are another large sector and there were just over 100,000 of these, an average of 6,200 per week, however this is down by 16% on last year but significantly ahead of 2007. There were 62,000 VFR trips which, on a weekly basis, is level with the last two years.

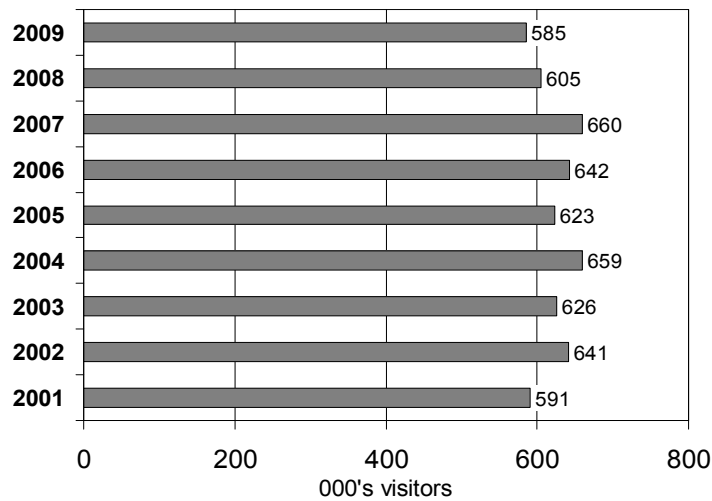
Estimated number of domestic day visitors  
Q4 2009 vs. previous years



**Total number of domestic visits**

Taking all domestic trips together, there were approximately 585,000 trips which is an average of 35,000 per week. This is up slightly on 2008 (+2%) but down by 8% on autumn 2007.

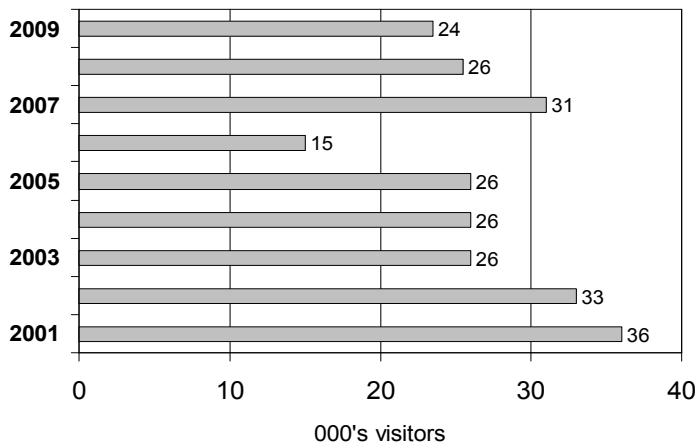
Estimated number of domestic visitors  
Q4 2009 vs. previous years



**Estimated number of visits made by overseas residents**

Relatively few visits are made by overseas residents at this time of year, especially compared to spring and summer. An estimated 24,000 visits were made, similar to last year and 2003 – 2005 but below 2007. 70% of these visits were staying visits.

Estimated number of visits by overseas residents  
Q4 2009 vs. previous years



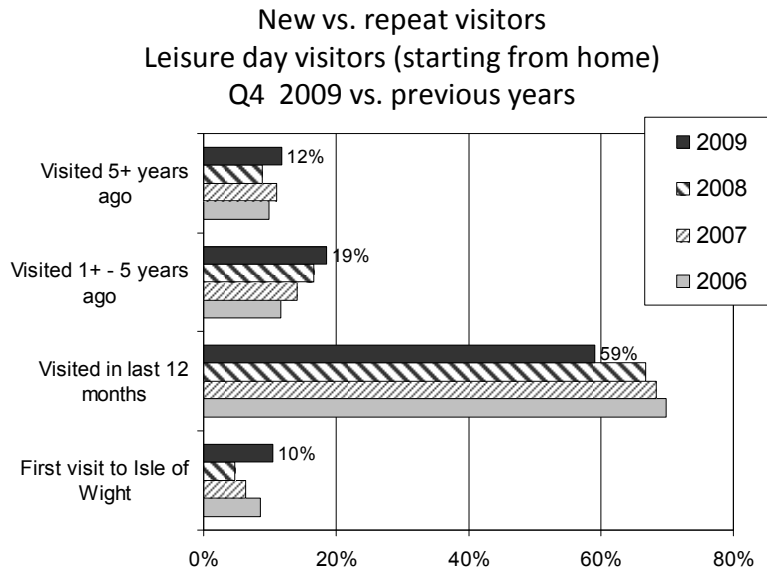
NB. Estimates of abroad visitors based on small sample hence volumes can fluctuate

**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, if at all. 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 (trip starting from home):** Visitors were most likely to be regular visitors to the Island – around 6 out of 10 had already been to the Island in the last 12 months. Whilst this is a high proportion, it is down several points on recent years suggesting that the economy has squeezed some regular visitors out of the market. One fifth had been within the last 5 years, a similar proportion to last year although, over time, the trend is upwards.

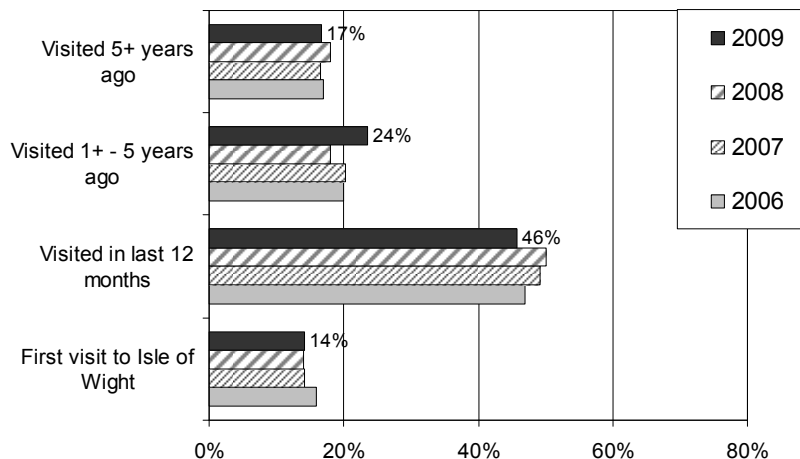
Only a minority of people (10%) were on their first visit but this is double the number last year; in addition 12% had returned to the Island after a long break (5+ years), a similar proportion to recent years.



NB. Estimates based on small samples

**Leisure staying visitors** were a little more likely than day visitors either to be new to the Island (14%) or returning after 5+ years (17%). However, in line with day visitors, the majority were regular visitors: almost half had visited before in the last year (a slight fall on last year) and a quarter had visited in the last 1 - 5 years, an increase of 6 points on last year.

New vs. repeat visitors  
Holiday/short break visitors Q4 2009 vs. previous years



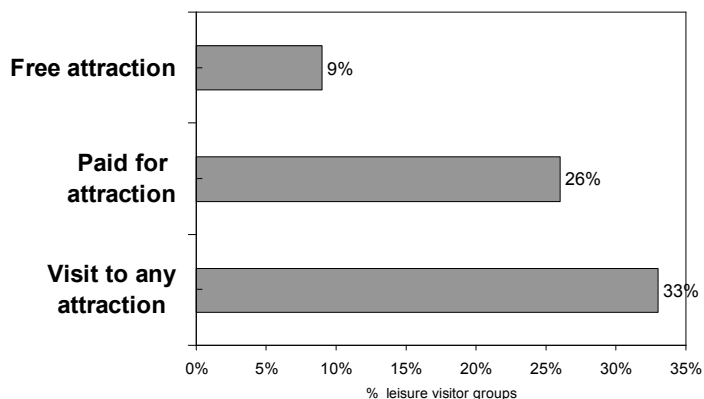
Based upon these visitor patterns it is estimated that approximately 93,000 new or lapsed (5+ years) visitors came to the Island during autumn. This is almost double the number seen last year and back to the level seen in 2007. This shows the Island has been very successful at attracting new visitors over the autumn period. Almost 70% of these new/lapsed visitors were the higher value staying leisure visitors.

	Leisure day visitors (not VFR)	Short break/holiday visitors (not VFR)
000's new/lapsed visitors	37	56

**Visits to attractions**

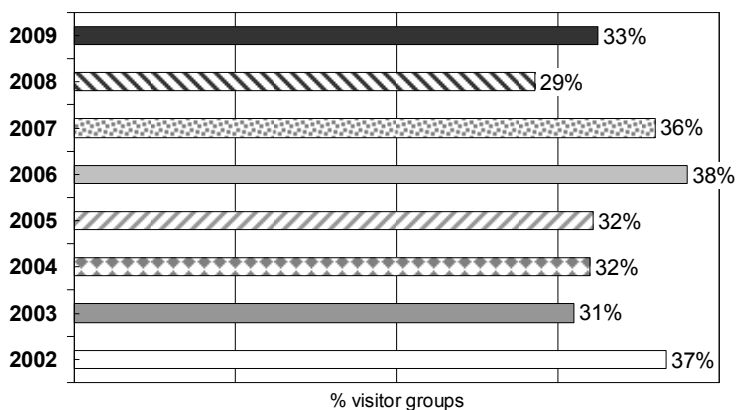
A third of leisure visitors went to an attraction of some description; most of these visited one charging an entrance fee (26%) whilst another 9% visited a free attraction.

Estimated visits to types of attractions  
Q4 2009



Looking at the trend over time, much of the ground lost last year has been recovered with visits to attractions up by 4 points on last year. This is down slightly on the previous two very successful years but similar to 2003 - 2005.

Estimated visits to any attractions  
Q4 2009 vs. previous years



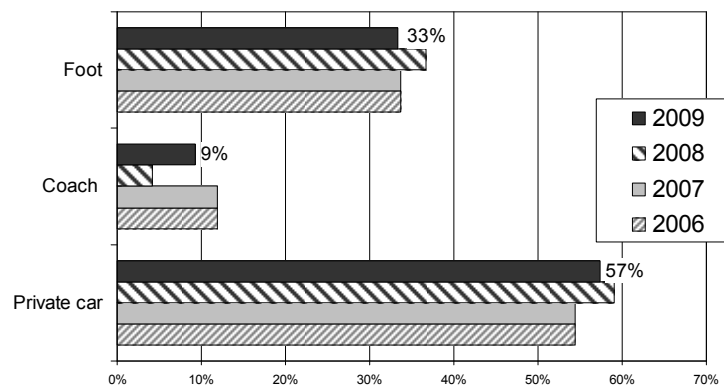
**Mode of transport**

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**

Over half travelled by private car, in line with previous years. The growth in popularity of the car, seen last year, was eroded slightly this autumn (down 2 points). Most of the remainder travelled on foot; this was the chosen mode for a third of visitors, also down slightly on last year. Travel by coach, increased back to the level seen in 2007 and 2006, taking up the fall in both car and foot travel.

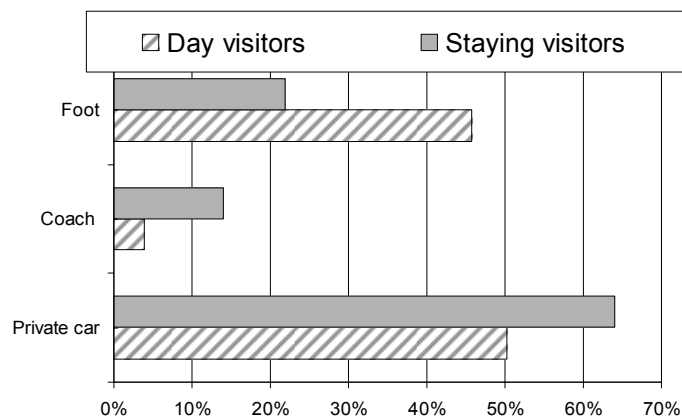
Mode of travel to/from the Island  
Autumn 2009 vs. previous years



Day and staying visitors tend to favour different modes of travel; the pattern seen this year is in line with last year:

- Staying visitors were most likely to travel by car: 64% vs. 50% of day visitors.
- Day visitors were fairly equally divided between travel on foot and by car; they were twice as likely as staying visitors to travel on foot (46% vs. 22%).

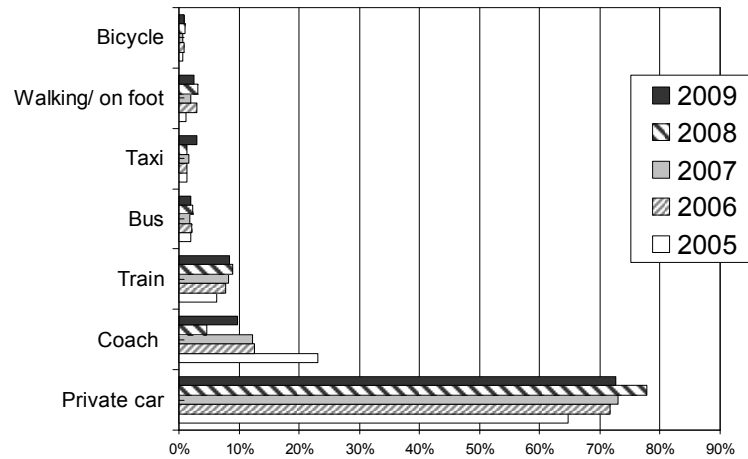
Mode of travel to/from the Island  
Autumn 2009



### Mode of transport to the mainland terminal

From 2005 to 2008 there was a gradual increase in the use of a private car to get to the mainland terminal but this fell slightly this year: it is now 8 points ahead of 2005. The on-going decline in coach travel has also been arrested with a doubling of arrivals by coach since last year although travel by coach to the mainland port remains relatively low at 10%. There was little change in use of other modes and these are all at a similar and fairly low level. Comparing this with mode of travel on board shows that up to 1 in 7 visitors required car parking in Portsmouth or Southampton.

Transport used to travel to the mainland terminal  
Autumn 2009 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.

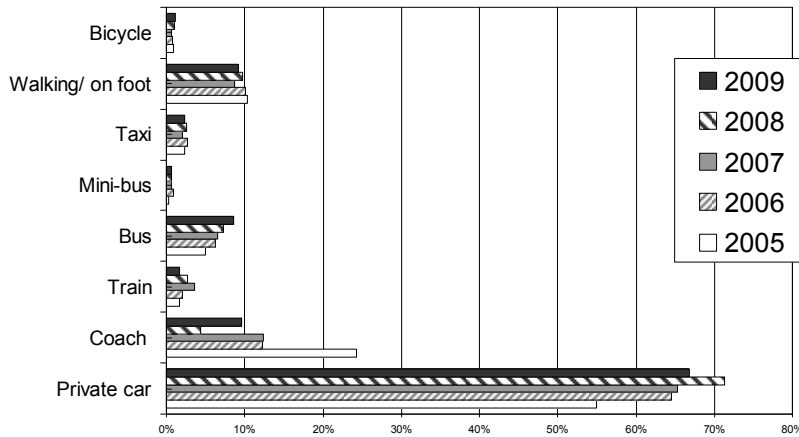
Differences between day and staying visitors were negligible with the only one of note being that staying visitors were more likely to arrive by coach (15% vs. 4%).

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

Once on the Island, the majority travel around by private car: over two thirds used their car (including the use of an Island resident’s car) although this figure decreased by 4 points from last year.

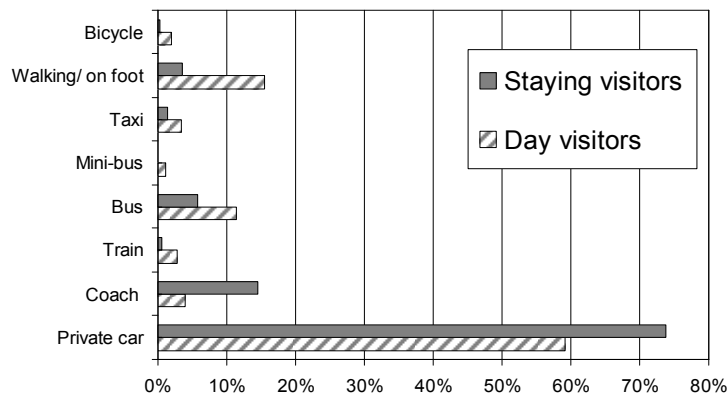
Coach travel around the Island more than doubled but was chosen by only 10% of visitors. The proportion walking was in line with recent years at 9% and at the same level as bus travel; bus travel has been increasing gradually over time.

Transport used to travel around the Island  
Autumn 2009 vs. previous years



Day and staying visitors tend to differ in their mode of travel around the Island: staying visitors were more likely to travel by private car (74% vs. 59%). More staying visitors chose to travel by coach although use of coach travel was low even amongst staying visitors. Whilst day visitors were most likely to travel by car, they were more likely than staying visitors to be walking, cycling or using public transport (the bus/train services).

Transport used to travel around the Island  
Day versus staying visitors  
Autumn 2009



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 the autumn is estimated at £80 million which is a weekly average of almost £5 million. This represents an estimated increase of 8% versus the autumn 2008 (excluding inflation). This is a significant increase and it is due to an increase in staying visits, primarily domestic short breaks and holidays.

Staying trips are estimated to be worth £69 million, the majority of which, £62 million, is from domestic staying trips. Day trips are estimated to have generated an additional £11 million of spending.

<b><u>Staying trips</u></b>	
All domestic staying trips	£62 million
All overseas staying trips	£7 million
<u>All staying trips</u>	<u>£69million*</u>
<b><u>Day trips</u></b>	
All domestic day trips	£11 million
(All overseas day trips	£0.3 million)
<u>All domestic day trips</u>	<u>£11million*</u>

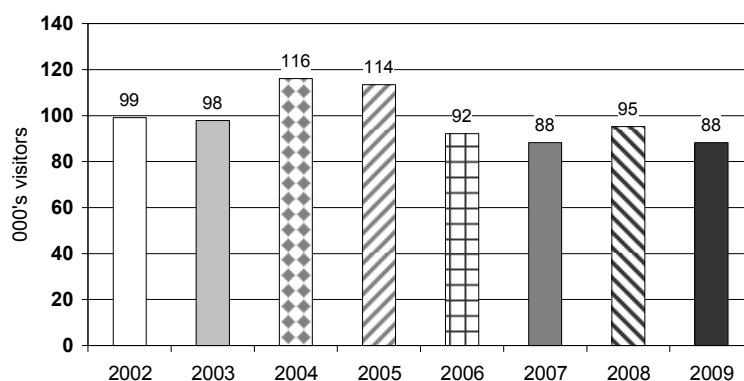
N.B. Spending by visitors arriving by yacht is not included in this calculation.

**Activity at Island Tourist Information Centres**

An estimated 88,000 visitors went to the Island TIC’s during the autumn. Whilst this is below last year, after adjusting for the shorter period it is a weekly average of 5,300 which is only slightly below last year (-2%) and is 4% up on the weekly average for 2007.

Average spend per head was £8.92 which is similar to the last two years.

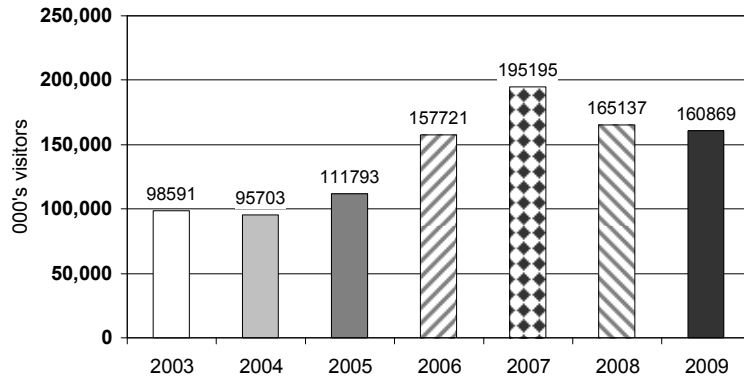
Number of visitors to TIC offices  
Q4 2009 vs. previous years



**islandbreaks.co.uk website activity**

There were over 160,000 visits to the website during the autumn (September 1<sup>st</sup> to December 31<sup>st</sup>). Whilst this is a small decrease on last year (-3%), it is up over the long term and the number of unique visitors is up by 5% versus last year.

Number of visitors to Isle of Wight Tourism website  
Q4 2009 vs. previous years



**Occupancy statistics**

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