

Tourism trends quarterly bulletin
Visitor Statistics for Winter: January to pre Easter 2010 (Q1)

Introduction

This bulletin provides the key findings of the tourism monitor for the period January 1st to March 28th 2010. Traditionally 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.

This winter quarter always ends before the Easter holiday period but the variations in the timing of Easter each year result in analysis periods of differing length. To adjust for this, trend data is based on average numbers of visitors per week through the period to enable meaningful comparisons to be made. Trend data since 2002 is included.

Easter 2010 was earlier than last year: April 2nd – 5th. (For comparison, Easter 2009 was April 10th – 13th; Easter 2008 was March 21st – 24th.) It should be noted that there was unusually severe weather during the winter this year; much of the country ground to a halt for a few days, affecting many people's travel plans and this therefore had a negative impact on tourism across the UK.

Looking first at international travel, during January to March visits to the UK made by overseas residents decreased by 1% versus 2009 to 7.4 million visits.* Visits from North America were affected slightly more than visits from Europe. Trips abroad by UK residents decreased much more, falling by 10%, down to 13.3 million trips.

Domestic travel data is available for January only. This shows that overnight trips across the UK were down by 3% and that holiday trips were affected more than business trips and visits to friends/relatives. A reduction in length of stay resulted in the number of bednights falling by 13%.

Turning to the Isle of Wight, firstly total travel across the Solent (combining travel by residents and visitors) increased by 8%. This growth comes after 3 years of little change in total travel. Travel by both residents and visitors increased with travel by visitors slightly ahead of residents.

Looking at visitors in more detail, the total number of visitors increased by 10% taking the volume back to the level last seen in winter 2003.

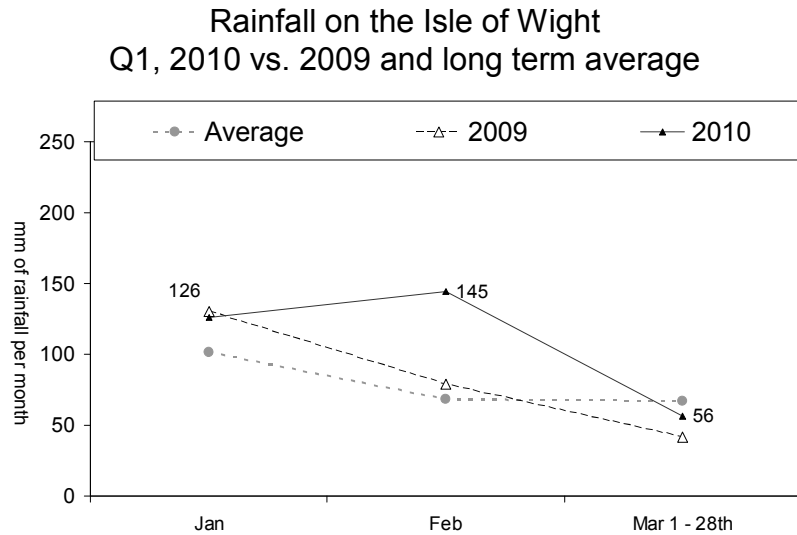
- Short breaks (domestic visits lasting 1 - 4 nights) increased to 72,000, an increase of 5% in the weekly average.
- Growth in business visits (+8%) and visits to friends/relatives (+19%) raised total domestic staying visits by 12% to 170,000, (average of 14,000 per week).
- An estimated 188,000 day visits were made which is an increase of 5% in the weekly average. This increase was due more business visits and visits to friends and relatives.
- An estimated 42,000 new visitors came to the Island over this winter period.
- 25% of leisure visitors went to an attraction up two points on last year.
- Approximately half the visitors travelled by car to the Island, down by 8 points on last year, this was accompanied by a swing to coach travel.
- Just over 160,000 visits were made to islandbreaks.co.uk by 115,000 unique visitors. These figures are down significantly on recent years (-22% vs. 2009).
- The value of tourism this quarter is estimated at £47 million; a significant increase in the weekly average value (+16% versus winter 2009). This increase is due to the increase in staying visits – especially short breaks and business visits.

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

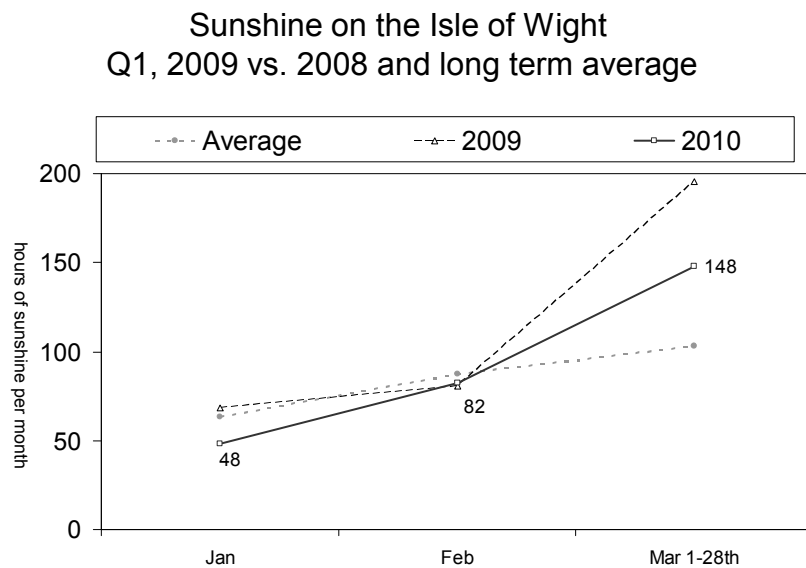
Weather

Winter 2010 included a period of extreme cold weather and heavy snow in January when there was severe disruption to travel and transport. Through this winter, the weather was generally cooler and wetter than average for the time of year.

The year started with rainfall slightly above average and this was followed by a very wet month in February with rainfall more than double the average. The weather improved in March and rainfall was slightly below average.

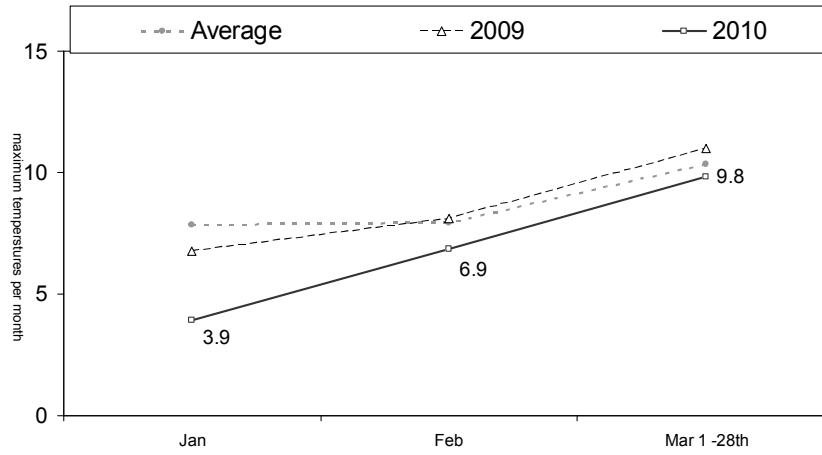


January was a generally dull month with hours of sunshine well below the norm; this improved in February and sunshine was in line with the norm for this time of year. March saw better weather with sunshine hours 16% above the average.



Maximum temperatures were well below the average through the winter: January was particularly cold versus the average, February and March temperatures were closer to, but below the average.

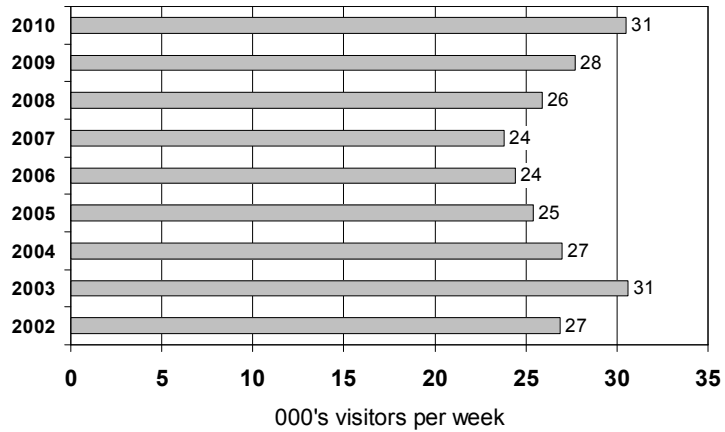
Maximum temperatures on the Isle of Wight
Q1, 2010 vs. 2009 and long term average



Estimated number of visitors to the Isle of Wight

An estimated 380,000 visits were made to the Isle of Wight during this 2010 winter period which equates to approximately 31,000 per week. This is an increase of 10% on last year and is higher than all years since 2003.

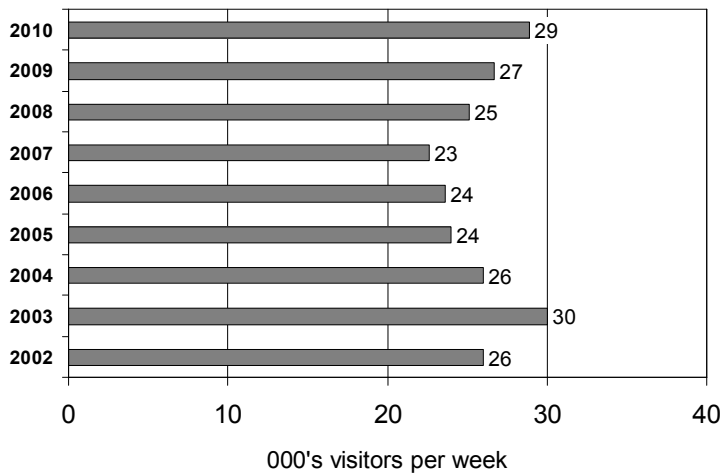
Estimated number of total visitors
Q1 2010 vs. previous years
Average visitors per week



Estimated number of domestic visitors

In line with the norm at this time of year, the vast majority of visitors were of domestic origin, 95%, which equates to almost 360,000 domestic visitors. Looking at the weekly average of 29,000, this represents an increase on recent years: +8% vs. 2009; + 15% vs. 2007. This takes the number of domestic visitors back towards the high point seen in 2003.

Estimated number of domestic visitors
Q1 2010 vs. previous years
Average visitors per week



Domestic visitors can be divided into staying and day visitors, as shown in the table below.

There was a slight change in the balance between staying and day visitors with the percentage of staying visitors increasing by two points on last year.

	Staying visitors %	Day visitors %
2010	48%	52%
2009	46%	54%
2008	50%	50%
2007	46%	54%
2006	53%	47%

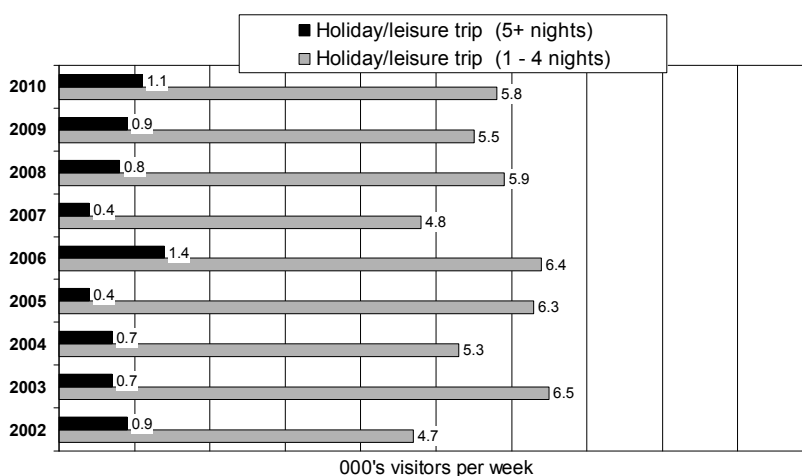
Estimated number of domestic leisure short break and holiday visitors

Short breaks and holidays are an important part of the visitor base even during the winter; these accounted for approximately a quarter of domestic visitors to the Island. There were 85,000 holiday/short break visitors - most were visitors taking a short break of 1 – 4 nights (72,000) with the remainder on a holiday of 5+ nights (13,000).

Looking at the average number of trips per week to allow comparison over time: there were almost 6,000 short breaks per week, an increase of 5% on last year and level with 2008; holidays of 5+ nights reached approximately 1,100 per week, again an increase on last year (+23% although this is on a small base) and on the previous two years.

Estimated number of domestic short break and holiday leisure visitors Q1 2010 vs. previous years

Average visitors per week



Other domestic staying visits

The other two key categories of staying trip are visits to friends/relatives (VFR) and business trips, (including business only and combined business and leisure trips). Both have increased versus the last two years, as shown in the table below.

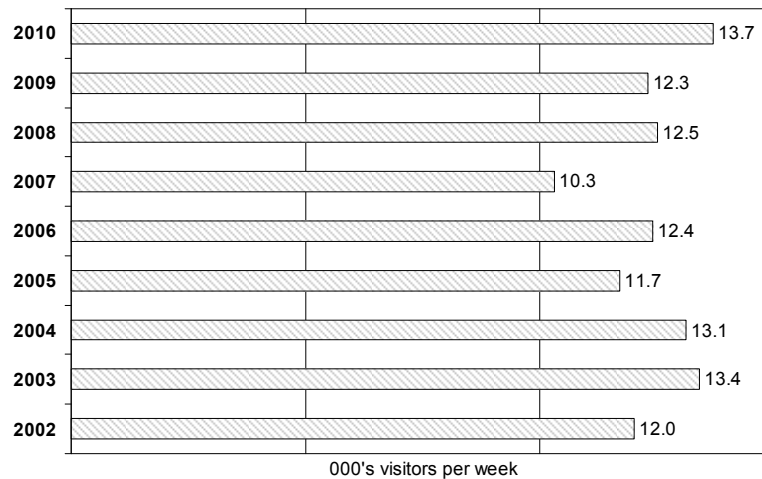
Type of domestic staying trip	Volume in Q1 2010	% change Q1 2010 vs. 2009	% change Q1 2010 vs. 2008
Visiting friends and relatives	59,000	+19%	+18%
Business/leisure and business	24,000	+8%	+18%

Estimated total number of domestic staying visitors

The estimated number of domestic staying visitors exceeded 170,000, an average of almost 14,000 per week. This is an increase of 12% versus last year and is the highest number recorded during the winter over the 9 year period illustrated.

Estimated number of domestic staying visitors Q1 2010 vs. previous years

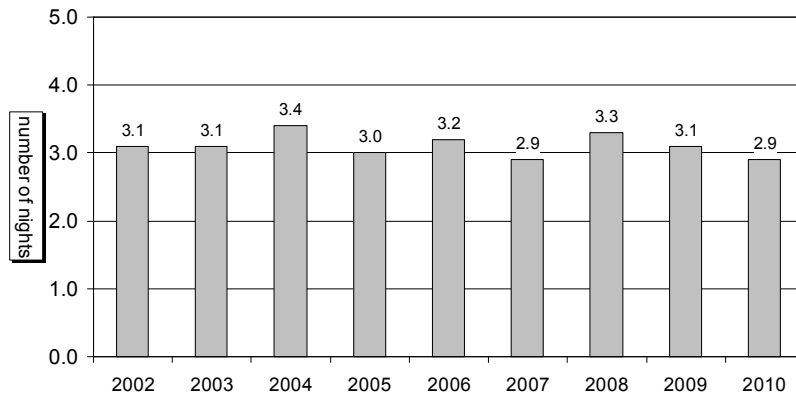
Average visitors per week



Average length of stay

The average length of stay is calculated for all types of domestic staying trips: length of stay has fluctuated around 3 nights for the last few years and this winter was 2.9 nights. The resulting estimated demand for bednights was approximately 490,000 bednights which is an increase of 5% on last year. Excluding stays with friends and relatives means an estimated 340,000 bednights were needed.

Average length of stay
Q1 2010 vs. previous years

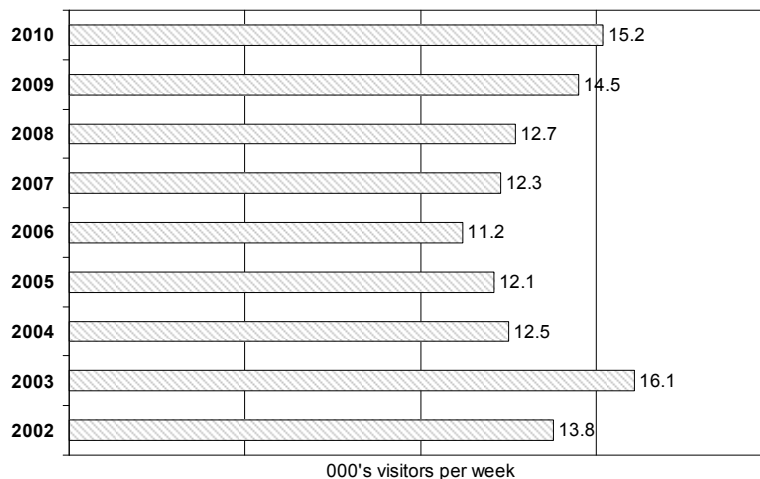


Estimated number of domestic day trips

An estimated 188,000 day trips were made during the winter period which equates to 15,200 per week. This is an increase of almost 5% vs. last year and is the fourth consecutive year that day visits have increased in number. Day trips are now up by a third versus 2006.

Estimated number of domestic day visitors
Q1 2010 vs. previous years

Average visitors per week

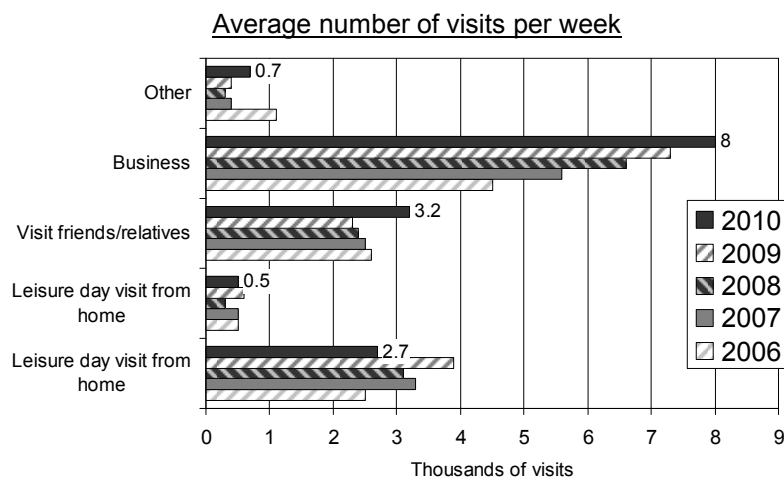


There were almost 100,000 business day trips making this the most important category of day trip during the winter period. This is equivalent to 8,000 a week which is an increase of 9% on last year and continues the upward trend in numbers. Business/commuting trips are now 77% up on 2006.

Leisure day visits (LDV) are another important type of trip, despite the time of year. There were just over 40,000, equivalent to 3,300 per week, however this is a significant drop in volume versus last year and recent years (-26% vs. 2009). The spontaneous nature of these trips may have meant that they were affected by the spells of severe weather.

The other category is day visits to friends and/or relatives, of which there were also around 40,000. This is a significant increase on last year and on recent years (+41% vs. 2009).

**Estimated number of domestic day visitors
Q1 2010 vs. previous years
Types of visit**



New versus repeat visitors to the Island

Leisure visitors (domestic and from overseas) 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. (97% of VFR visitors had visited the Island before.)

At this time of year the Island attracts a large proportion of regular, repeat visitors suggesting that there is a high degree of satisfaction with the Isle of Wight as a destination.

Day visitors: 60% of leisure day visitors were on a second or subsequent visit in a period of 12 months. As is typical at this time of year, far fewer (25%) were new/lapsed after more than 5 years.

Staying visitors: two fifths of the holiday/short break visitors were on their second or subsequent visit in the last 12 months. Staying visitors were more likely than day visitors to be new or returning to the Island after a break: a third (34%) of staying visitors were new/lapsed after more than 5 years.

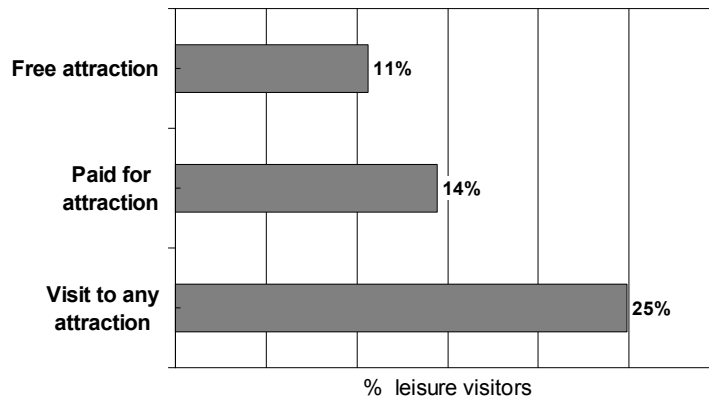
	Leisure Day visitors (not VFR)	Short break visitors (not VFR)
First visit to Island	18%	16%
Visited before in last 12 months	60%	41%
Visited before 12 months to 5 years ago	16%	24%
Lapsed (visited before, more than 5 years ago)	7%	18%

Based on these percentages, it is estimated that approximately 42,000 new or lapsed leisure visitors came to the Island on either a day trip or a short break/holiday in this quarter. This is in line with the winter period last year.

Visits to attractions

An estimated quarter of leisure visitors went to at least one of the Island’s attractions; attractions charging an entrance fee drew more visitors (14%) than the free* attractions (11%).

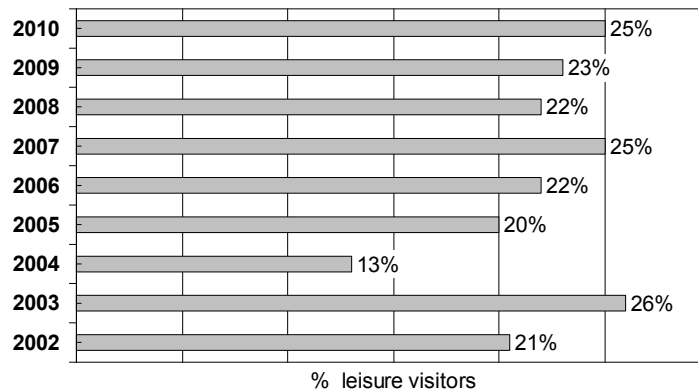
Estimated visits to types of attractions
Q1 2010



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

This is a slight increase versus recent years and takes the percentage visiting back to the level seen in 2007.

Estimated visits to any attraction
Q1 2010 vs. previous years



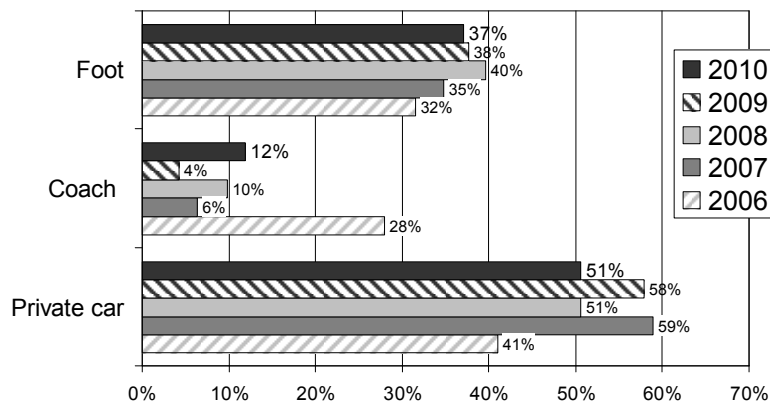
Mode of transport

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

Approximately half the visitors travelled by car which is a reduction of 7 points on last year but in line with 2008. Coach accompanied travel was also in line with 2008 but up on last year by 8 points. The proportion of visitors travelling as foot passengers was at a similar level to last year.

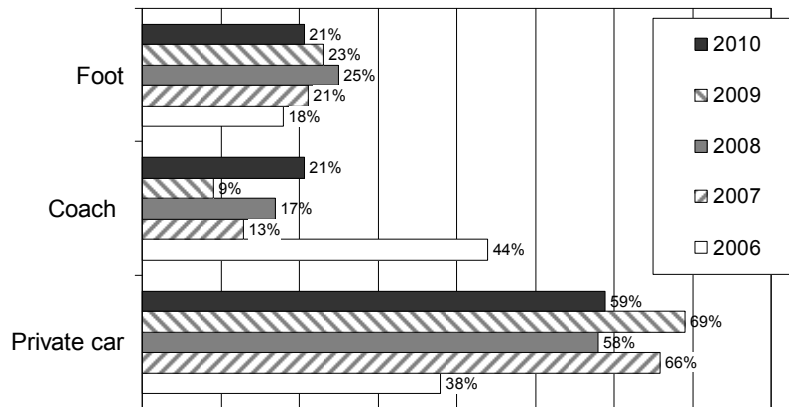
Mode of travel on board the ferry
Quarter 1, 2010 vs. previous years



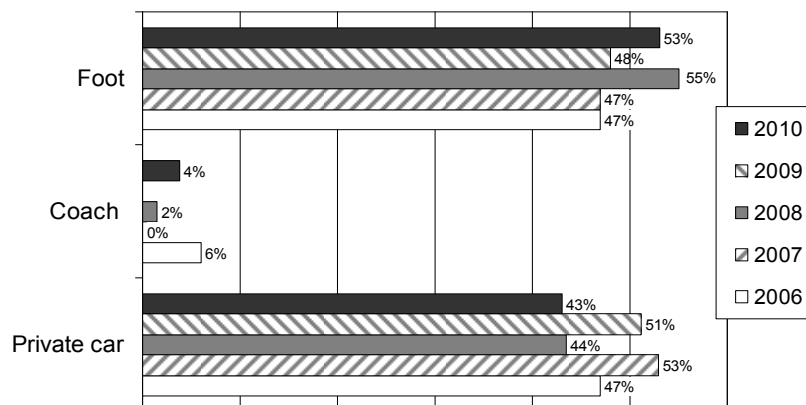
Whilst all visitors are most likely to travel by car, use of other modes differs significantly between staying and day visitors, as illustrated overleaf.

- Staying visitors: a fifth of this group travelled on foot, a slight fall on the last two years, and a fifth travelled by coach, reversing the reduction seen last year and up on the previous two years. Almost 6 in 10 travelled with a car, in line with two years ago but down by 10 points on last year.
- Day visitors: travel on foot is much more popular amongst day visitors, over half of whom travelled on foot, up by 5 points on last year. Travel by car dropped by 8 points whilst travel by coach increased slightly.

Mode of travel on board the ferry
 Quarter 1, 2010 vs. previous years
 Staying visitors



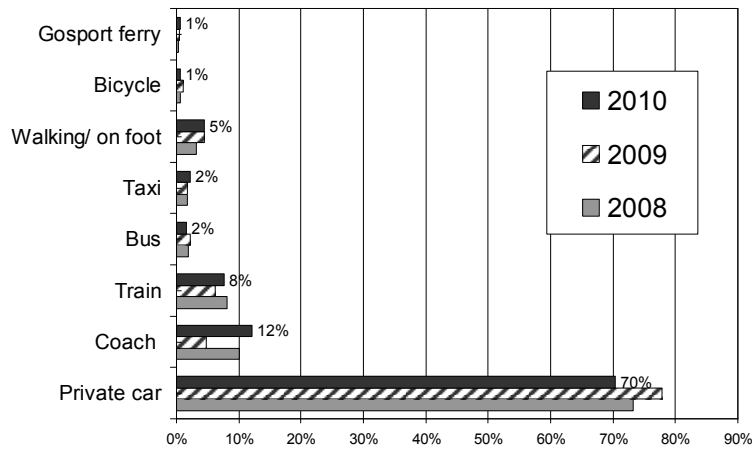
Mode of travel on board the ferry
 Quarter 1, 2010 vs. previous years
 Day visitors



Mode of transport to the mainland terminal

The vast majority used a private car to travel to the mainland port (70%), whilst this is in line with previous years, use of the car reduced slightly with the main gain being in travel by coach. This may reflect the introduction of the Greyhound coach service. Use of other modes remained constant versus the last two years.

Transport used to travel to the mainland terminal Quarter 1, 2010 vs. previous years



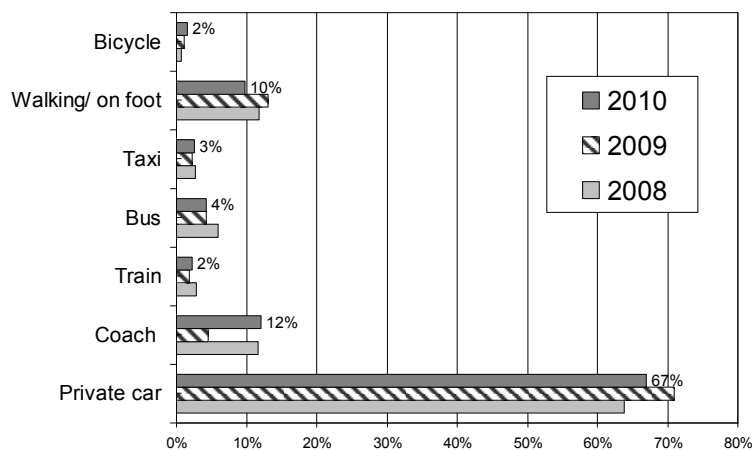
The key differences between day and staying visitors were that staying visitors were more likely to arrive by coach (21% of staying vs. 4% of day) and day visitors were slightly more likely to arrive on foot (6% of day vs. 2% of staying) or by car (77% of day vs. 66% of staying).

Mode of transport to travel around the Island

Once on the Island, the private car continues to dominate travel with two thirds choosing the car; this is down slightly versus last year. A significant proportion of car travel is provided by friends/relatives for some who have travelled on foot on the ferry (11%). The popularity of walking has decreased slightly to 10%, perhaps due to the very cold winter. Use of buses and trains on the Island was at a low level but in line with previous years (4% and 2% respectively).

There were some differences between day and staying visitors: coach travel increased significantly amongst staying visitors - from 9% to 21% of staying versus just 4% of day visitors. Staying visitors were more likely to travel by car (70% of staying vs. 61% of day) whereas day visitors were much more likely than staying visitors to be walking (18% of day vs. 3% of staying).

Transport used to travel around the Isle of Wight Quarter 1, 2010 vs. previous years



Value of tourism

Tourism is estimated to have contributed £47 million to the Isle of Wight economy during this winter period. This equates to £3.8 million per week after adjusting for the quarter length. This is a significant increase versus last year and is estimated to be up by 16% excluding inflation; this is due primarily to the increase in staying visits.

Staying trips are estimated to be worth almost £40 million or a weekly average of 3.2 million and day trips contributed almost £7 million, an average of just over half a million pounds per week.

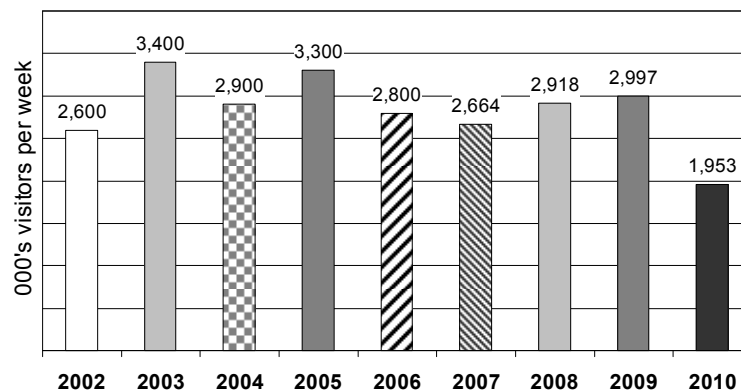
<u>Staying trips</u>	
All domestic staying trips	£34million
All overseas staying trips	£6 million
<u>All staying trips</u>	<u>£40 million*</u>
<u>Day trips</u>	
<u>All day trips</u>	<u>£7 million*</u>

* Addition of individual figures may vary from total due to rounding of figures.

Activity at Island Tourist Information Centres

During this quarter over 24,000 people visited the Island TIC's; an average of 1,950 per week. (This figure includes both visitors to the Island and residents). This is down significantly on previous years although the average spend was up significantly at £19.25.*

Number of visitors to TIC offices
Q1 2010 vs. previous years



*N.B. This figure includes sales to residents of tickets for local events and for coach travel.

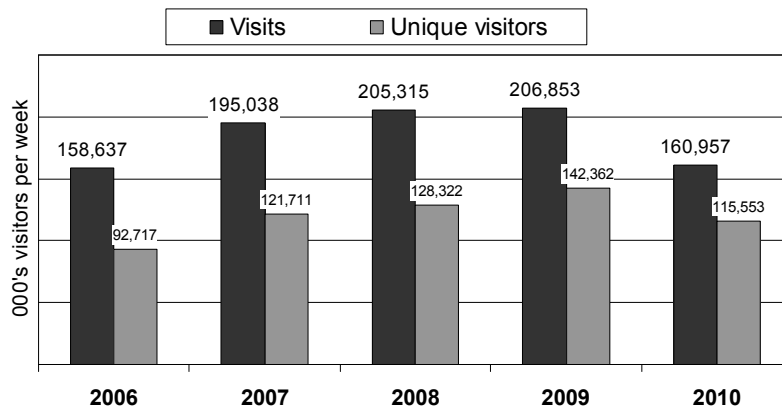
Website activity: islandbreaks.co.uk

Almost 161,000 visits were made to the Isle of Wight Tourism website during January to March (full months). This is a significant reduction on the same period last year, at -22% - and is below the previous two years.

The number of unique visitors to the site was also down, by 19%, to 116,000.

Looking over the medium term, visits and unique visitors to the site remain slightly higher than in 2006.

Number of visitors to islandbreaks.co.uk
Jan – Mar 2010 vs. previous years



Occupancy statistics

The Isle of Wight occupancy statistics for winter 2010 will be issued in a separate bulletin.