

# Tourism trends quarterly bulletin

## Visitor Statistic for Spring 2011 (Q2 Easter to mid July)

### Introduction

This bulletin provides the key findings of the tourism monitor for the period April 4 to July 18th 2011 (15 week period this year compared to 16 week period last year). This period includes the Easter bank holidays and school holidays and continues through to just before the summer peak season. It includes the two bank holidays in May and the school spring half term holiday.

Comparisons with historical data are based upon average number of visitors per week, to overcome the variations in quarter length. Where possible, comparisons are made with previous research back to 2005. Please note that only full year results provide the best comprehensive picture of tourism on the Isle of Wight. The quarterly results provide some indication of seasonal trends year-on-year.

The findings in this bulletin are based on research conducted on board the six ferry routes to the island. The number of visits to [www.islandbreaks.co.uk](http://www.islandbreaks.co.uk) is also provided.

### Total passenger volume

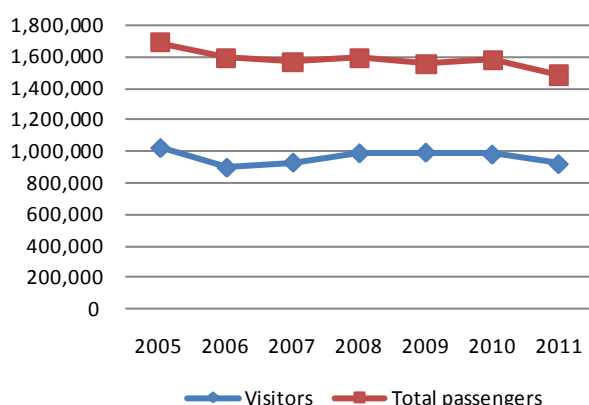
Compared to Q2 last year the volume of total passengers (visitors and residents) dropped by 6% (from 1,579,807 to 1,482,528). This was driven by a reduction in day visitor volume.

Compared to the same period last year, the number of visitors travelling to the Isle of Wight from elsewhere also dropped by 6% from an estimated 983,700 visitors to 921,400 visitors.

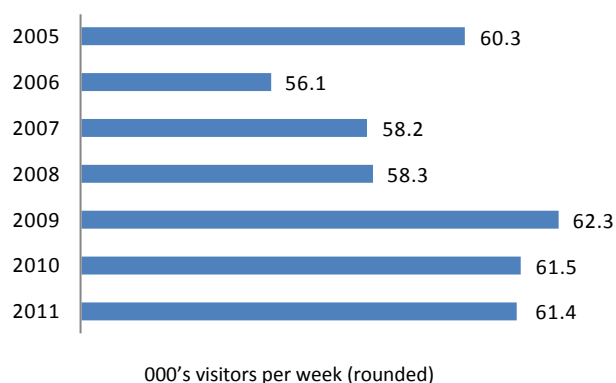
Based on the survey data it is estimated that 61,400 visits per week were made to the Isle of Wight over Q2 this year by visitors, compared to 61,500 visits per week in 2010, and 62,300 visits per week in 2009.

Table 1: Changes in visitor and passenger numbers to IOW over Q2 since 2005				
	Visitors	Year-on-year % change	Total passengers	Year-on-year % change
2005	1,025,679		1,692,995	
2006	898,133	-12%	1,594,413	-6%
2007	931,434	4%	1,567,818	-2%
2008	991,771	6%	1,593,392	2%
2009	996,182	0%	1,554,794	-2%
2010	983,699	-1%	1,579,807	2%
2011	921,393	-6%	1,482,528	-6%

Total travel to the Isle of Wight  
Q2 2011 vs previous years



Average number of visitors per week  
Q2 2011 vs previous years



## Domestic visitors to the Island

In common with previous years, the majority of visitors to the Island over Q2 were domestic visitors (95%).

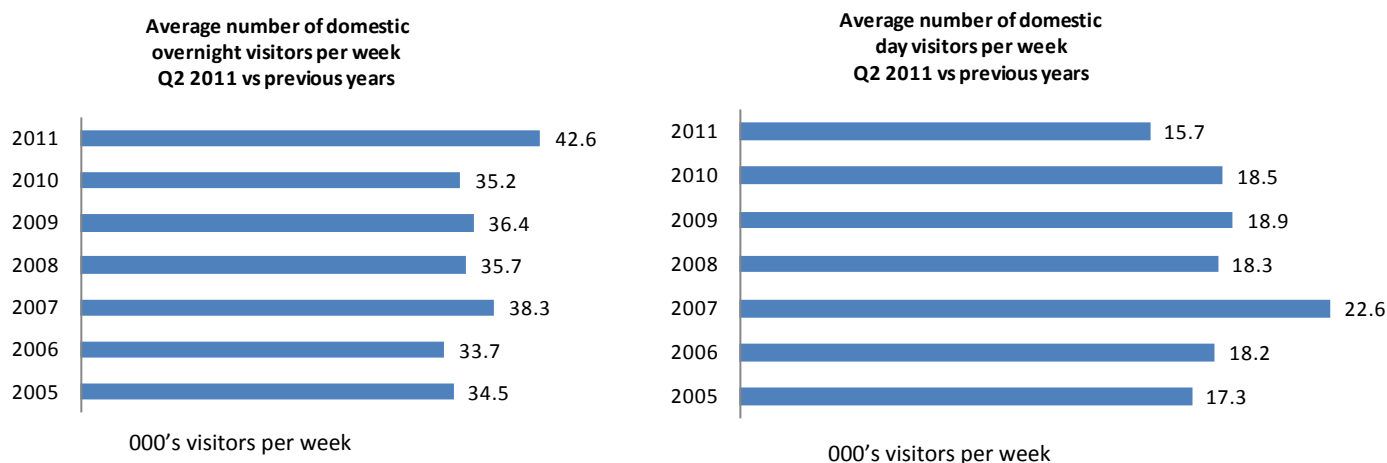
There were an estimated 876,700 domestic visits, of which 640,100 (73%) were staying overnight on the Island and 236,600 (27%) were day visitors, visiting either from their home and returning back to their home on the same day, or were making a day trip to the Isle of Wight whilst staying on holiday elsewhere.

Compared to Q2 last year, the overall volume of domestic visits dropped by 2% (down from 890,800 visits). However, the drop in overall domestic trip volume is the result of a 28% reduction in day trips to the Island compared with Q2 last year. Overnight trips spent on the Island actually increased by 14% according to the survey results.

The survey data alone cannot explain the reasons for the changes in visitor numbers – other factual and anecdotal data needs to be consulted such as commercial occupancy levels on the Island over Q2. The survey results do reveal however that such fluctuation in visitor numbers is not uncommon. For example, over the same period in 2008 we saw a significant increase in domestic day visitor numbers compared to 2007 (up by 29%).

	UK overnight visitors	Year-on-year % change	UK day visitors	Year-on-year % change	All UK visitors	Year-on-year % change
2005	586,532		370,928		957,460	
2006	538,707	-8%	302,908	-18%	841,615	-12%
2007	612,333	14%	261,219	-14%	873,553	4%
2008	607,515	-1%	336,284	29%	943,799	8%
2009	582,062	-4%	357,295	6%	939,357	0%
2010	562,847	-3%	327,954	-8%	890,801	-5%
2011	640,101	14%	236,606	-28%	876,707	-2%

Looking at the average number of trips per week over Q2 this year, the volume of domestic overnight visits increased from an average of 35,200 per week in 2010 to an average of 42,600 per week in 2011 and the volume of domestic day visits dropped from an average of 18,500 to 15,700 per week in 2011.



Overnight domestic visitors came from across the UK; the three top sources generating domestic overnight trips over Q2 were Hampshire (15.8%), London (11.1%) and Surrey (8.5%).

Over half of all day trips were residents of Hampshire (55.7%). See list overleaf.

**Home residence of domestic visitors**

UK staying		UK day	
Hants	15.8%	Hants	55.7%
London	11.1%	West Sussex	5.9%
Surrey	8.5%	Surrey	5.3%
Kent	5.0%	Dorset	4.0%
West Sussex	3.9%	London	4.0%
Middlesex	3.6%	Middlesex	2.3%
Berks	3.3%	Wilts	2.1%
Essex	3.2%	Berks	1.6%
Somerset (incl. Bristol)	3.0%	Oxon	1.5%
East Sussex	2.8%	Herts	1.4%
Dorset	2.8%	Somerset (incl. Bristol)	1.3%
West Midlands	2.7%	East Sussex	1.2%
Herts.	2.4%	Kent	1.2%
Wales - South	2.0%	Essex	1.1%
Cambs.	1.7%	West Midlands	1.0%
Bucks	1.6%	Northants	0.8%
Oxon	1.4%	Glos.	0.7%
Warwickshire	1.4%	Bucks	0.7%
Yorkshire - West	1.4%	Yorkshire - South	0.6%
Glos.	1.3%	Norfolk	0.6%
Staffs	1.3%	Beds	0.6%
Scotland	1.3%	Cheshire	0.5%
Notts.	1.2%	Devon	0.5%
Lincs.	1.2%	Wales - South	0.5%
Derbyshire	1.2%	Notts.	0.5%
Worcs.	1.1%	Leics.	0.4%
Leics.	1.0%	Lincs.	0.4%
Northants	1.0%	Yorkshire - West	0.4%
Wilts	1.0%	Staffs	0.3%
Norfolk	0.9%	Yorkshire - North	0.3%
Lancs.	0.9%	Wales - North	0.3%
Suffolk	0.9%	Warwickshire	0.3%
Beds	0.8%	Cambs.	0.3%
Cheshire	0.8%	Herefordshire	0.3%
Devon	0.7%	G. Manchester	0.2%
Yorkshire - East	0.7%	Derbyshire	0.2%
Yorkshire - South	0.6%	Merseyside	0.2%
Channel Islands	0.5%	Shropshire	0.2%
Shropshire	0.5%	Cornwall	0.2%
Tyne & Wear	0.5%	Lancs.	0.1%
Yorkshire - North	0.5%	Cumbria	0.1%
Cornwall (	0.4%	Worcs.	0.1%
Herefordshire	0.3%	Cleveland (Tees Valley)	0.1%
Northumberland	0.3%	Suffolk	0.1%
G. Manchester	0.3%	Northumberland	0.1%
Wales - North	0.3%	Yorkshire - East	0.1%
Wales - Mid	0.3%	Durham	0.1%
Durham	0.2%		
Merseyside	0.2%		
Rutland	0.2%		
N. Ireland	0.1%		
Cleveland (Tees Valley)	0.1%		
Cumbria	0.1%		

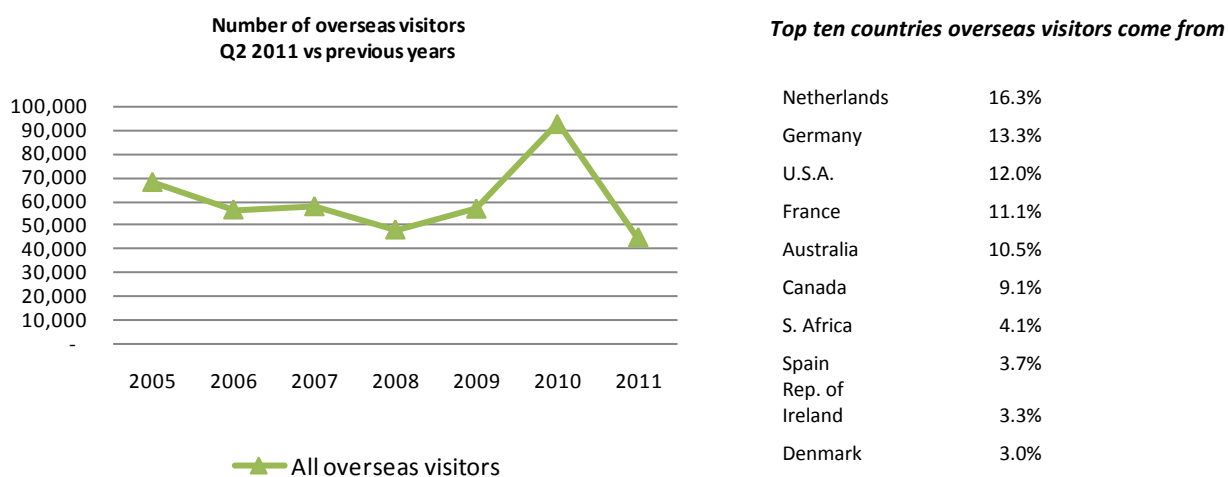
## Overseas visitors to the Island

Traditionally overseas visitors have accounted for around 4% to 5% of the visitor market on the Isle of Wight.

The survey data on the profile of overseas visitors for this quarter is made of a relatively small sample. The sample is sufficiently large enough to produce indicative overall results for all visits made by overseas visitors to the Isle of Wight, but not large enough for us to provide reliable results split by *day trips*<sup>1</sup> and *overnight trips* made by overseas visitors.

Overall it is estimated that 44,700 visits (approx. 3,000 trips per week) were made to the Isle of Wight by travellers from overseas during Q2. This is just over half the volume of visits made during the same period last year. It is reasonable to attribute this drop in volume to the ongoing global economic downturn which has led to a general reduction in international trip taking, particularly for global business purposes. However, the survey data from last year reveals that in 2010, the volume of visits made to the Isle of Wight by overseas visitors actually increased compared to 2009. Visits in 2009 were also higher in number compared to 2008.

The reasons for the rise and fall in visits by overseas visitors are not clear and the results of the survey need to be assessed against other data sources such as commercial accommodation occupancy rates, visitor admission numbers to attractions as well as the views of local businesses.



Overseas visitors come from a wide range of countries – the nationalities most frequently encountered during Q2 were Dutch (16.3%), German (13.3%), American (12%), French (11.1%), Australian (10.5%), and Canadian (9.1%).

<sup>1</sup> By day trips we mean trips made by overseas visitors to the island just for the day whilst staying overnight elsewhere.

## Purpose of visit

The survey results presented in Table 3 and Table 4 are the distribution of trip purpose among domestic and overseas visitors respectively since 2005.

The survey results reveal that the main trip purpose among domestic overnight visitors has remained relatively consistent over the years.

The passenger survey results show very clearly that the Isle of Wight is a popular short break and holiday choice for domestic visitors as a supplement to the main holiday which is taken elsewhere. Around half of all domestic visits to the Isle of Wight over Q2 were 'Other holiday/leisure' overnight trips.

Table 3: Trip purpose among domestic visitors over Q2 since 2005							
	2011	2010	2009	2008	2007	2006	2005
Main holiday	6%	4%	5%	3%	6%	4%	3%
Other holiday/leisure	52%	40%	40%	39%	49%	43%	43%
VFR overnight	12%	12%	14%	14%	11%	12%	10%
Business overnight	2%	3%	2%	5%	2%	3%	2%
Leisure & business	0%	3%	1%	2%	1%	1%	3%
Other overnight	1%	1%	1%	2%	1%	0%	0%
Leisure day from home	10%	15%	14%	16%	13%	14%	16%
leisure day on holiday	4%	5%	5%	3%	4%	4%	4%
VFR day	5%	6%	6%	6%	5%	7%	6%
Business day	7%	9%	12%	10%	7%	9%	9%
Other day	1%	1%	1%	1%	1%	2%	4%

The primary purpose for visiting the Isle of Wight among overseas visitors appears to be more mixed.

During Q2 this year, the two main reasons generating visits by overseas visitors were 'Other holiday/leisure' and visiting friends and relatives on an overnight trip.

Just over a fifth of trips made by overseas visitors were day trips. The vast majority of these visitors were day trip excursionists, visiting as part of a tour or through independent travel whilst holidaying or visiting friends/relatives elsewhere in the UK.

Trend data reveal significant changes in trip purpose among overseas visitors. During the same period last year, around a third of all overseas visitors were visiting the Isle of Wight on a day trip excursion whilst staying elsewhere. Other years where we see a peak in day trip excursions among overseas visitors are 2006 and 2005.

Table 4: Trip purpose among overseas visitors over Q2 since 2005							
	2011	2010	2009	2008	2007	2006	2005
Main holiday	3%	3%	6%	2%	7%	5%	1%
Other holiday/leisure	41%	18%	52%	19%	18%	16%	16%
VFR <b>overnight</b>	31%	10%	23%	22%	13%	22%	15%
Business <b>overnight</b>	3%	6%	2%	33%	5%	2%	11%
Leisure & business	1%	21%	0%	1%	25%	1%	3%
Other	1%	0%	0%	1%	0%	0%	0%
Day on holiday	16%	34%	15%	21%	30%	52%	46%
VFR <b>day</b>	5%	1%	1%	2%	2%	2%	2%
Business <b>day</b>	0%	6%	1%	1%	0%	1%	5%
Other	1%	0%	0%	0%	0%	0%	0%

## Length of stay

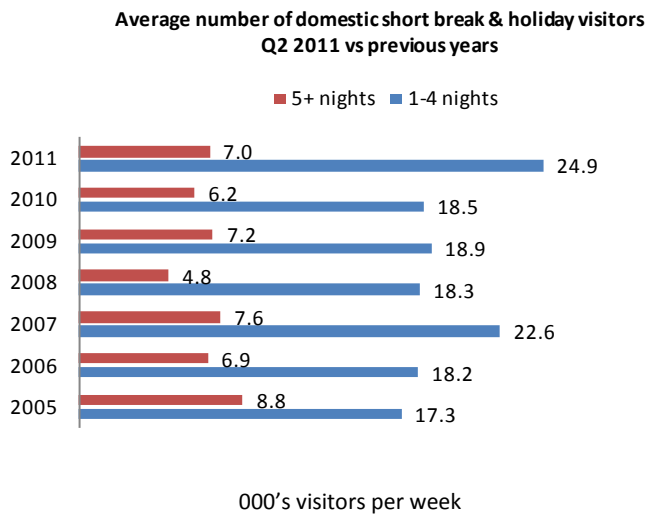
Based on the results of the passenger survey, overseas visitors staying overnight on the Isle of Wight during Q2 spent an average of 7.4 nights on their trip, whereas domestic overnight visitors spent an average of 4.2 nights on their trip.

Short breaks and short leisure trip (1 – 4 nights) are an extremely important part of the tourism sector at this time of year.

Year	Overseas visitors	Domestic visitors
2005	4.1	4.8
2006	4.2	4.9
2007	4.1	6.8
2008	3.7	5.8
2009	4.0	4.9
2010	3.7	5.2
2011	4.2	7.4

In total 58% of all domestic trips during Q2 were holiday trips (of which 6% were main holiday trips and 52% were secondary or other holiday/leisure trips). This translates to approximately 505,500 holiday trips of which 399,800 (or 79%) involved a short break of up to 4 nights and 105,700 (or 21%) involved a longer holiday of 5 nights or more.

The average weekly volumes are presented below. The average number of short breaks during Q2 this year was 24,900, up from 18,500 during the same period last year. The average number of longer stay trips also increased from an average of 6,200 trips per week during Q2 in 2010 to 7,000 trips per week over Q2 this year.



Unfortunately the sample size of overseas visitors providing information on short breaks and holidays was too small to provide any meaningful trend data.

## Type of accommodation used

Among all visitors staying overnight over Q2, 28.8% were staying in the home of a friend or relative.

Caravanning and camping was a popular choice during this quarter. Around a quarter of overnight visitors stayed in a caravan/chalet or tent.

Hotels were used by around a quarter (22.6%) of all overnight visitors.

Around 10% of overnight visitors stayed in self-catering accommodation.

Staying with friends or relatives	28.8%
Caravan/chalet/tent	24.5%
Hotel	22.6%
Self-catering house, cottage or flat	10.4%
Guest House, B&B, pub or inn	5.1%
Second home	5.0%
Other type of accommodation	1.5%
Own static caravan or chalet	1.0%
Onboard a yacht or boat	0.9%

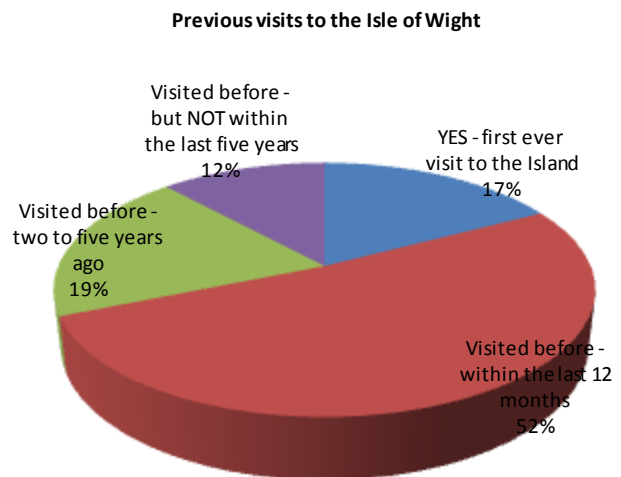
## New versus repeat visitors to the Island

Seventeen percent of all visitors were visiting the Isle of Wight for the first time during Q2 2011.

The majority (83%) had visited the Island before. Around a half had visited within the last 12 months.

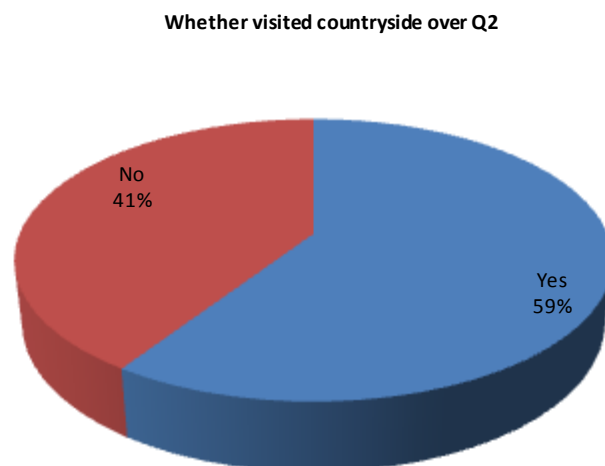
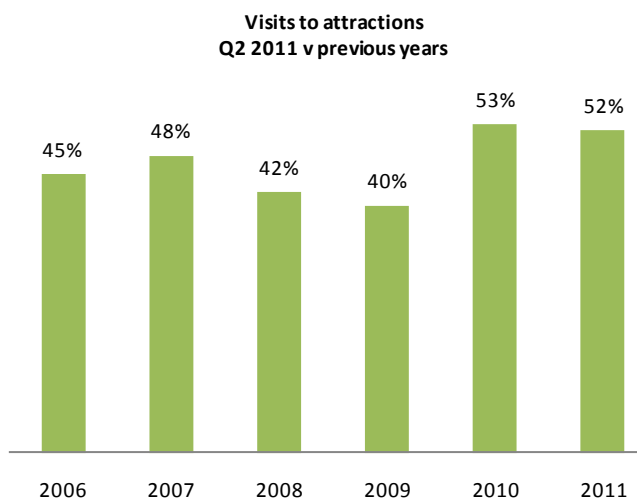
The most frequent visitors were those with friends or relatives living on the island.

First time visitors were most likely to be either holidaying on the island for the first time or taking a day trip excursion for the first time from a holiday base outside the island.



## Visitors to the Island attractions

Overall, a half (52%) of all visitors to the Isle of Wight visited one or more of the island's visitor attractions over Q2.

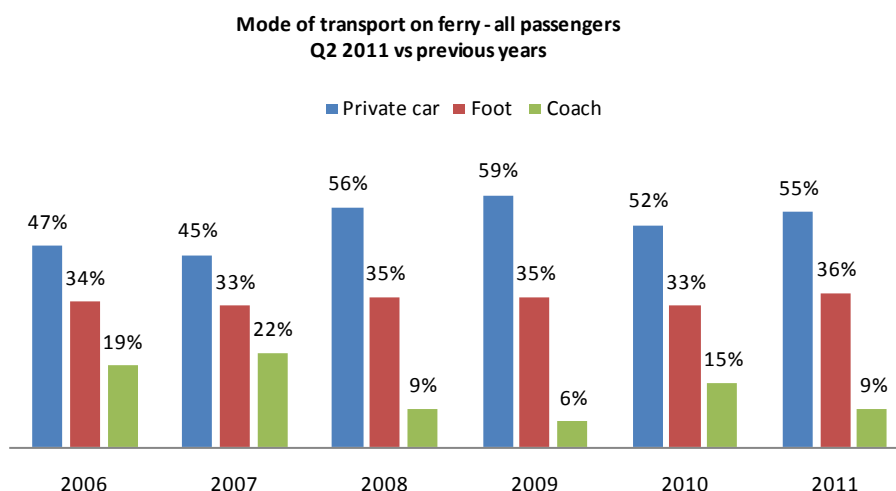


The island's countryside was visited by just over half of all visitors during Q2 in 2011. This was slightly up from the 52% who visited the countryside during Q2 last year.

## Mode of transport

All visitors are asked how they travel 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.

The distribution of car, coach and foot passengers on the ferries in Q2 this year remained relatively similar to that seen last year over the same period.



With regard to the mode of transport used to travel around the Island, the majority, the survey data reveals that many of those arriving by car spent much of their time travelling on foot and using the bus service to get around island.

Overall, 27% of all visitors (all car, foot and coach passengers) travelled around the island on foot, 24% relied on transport provision made available by friends and relatives (i.e. friend or relative driving visitors around in their own car) and 23% used the bus service.

## Volume & value of tourism

Given the drop in the volume of both domestic and overseas overnight trips spent on the Isle of Wight this year compared to last year, it should come as no surprise to see a related drop in total trip expenditure.

Overall, overnight trips generated just over £154 million in trip expenditure during Q2 2011, down by 2% from the £158 million over the same period last year.

Day trip volume declined relatively more this year, leading to a 24% drop in the expenditure made by day visitors on the island compared to the same period last year. In total, day visitors spent over £10 million this year compared to £13.4 million last year. Despite the overall drop in volume, average day trip spend increased per head compared to last year.

In total, tourism activity over Q2 this year generated £164.2 million for Island businesses, down 4% from £171.4 million last quarter.

Table 8: Total volume of trips and associated expenditure over Q2						
	Q2 2011			Q2 2010		
	Total trips	Total trip expenditure	Avg. spend per trip	Total trips	Total trip expenditure	Avg. spend per trip
Domestic overnight	640,101	£143,000,000	£223.32	562,847	£135,000,000	£239.85
Overseas overnight	35,011	£11,100,000	£317.93	55,119	£23,000,000	£417.28
<b>Sub-total</b>	<b>675,112</b>	<b>£154,100,000</b>		<b>617,966</b>	<b>£158,000,000</b>	
Overseas day	9,674	£622,500	£64.35	37,779	£1,400,000	£37.06
Domestic day	236,606	£9,500,000	£40.15	327,954	£12,000,000	£36.59
<b>Sub-total</b>	<b>246,280</b>	<b>£10,122,500</b>		<b>365,733</b>	<b>£13,400,000</b>	
<b>Total</b>	<b>921,392</b>	<b>£164,222,500</b>		<b>983,699</b>	<b>£171,400,000</b>	

Note: Trip expenditure has been rounded.

Note: Overseas trip volume by overnight and day is based on small sample.

Note: Up until 2010 expenditure data has been based on the national average spend figures produced by the United Kingdom Tourism Survey and the International Passenger survey. In 2011 we introduced questions on expenditure in the survey, enabling us to provide more accurate figures.

## Website activity: islandbreaks.co.uk

The chart below shows total visits and numbers of unique visitors to islandbreaks.co.uk during the 3 month period of April to June (full calendar month) for each year since 2006. This year 252,321 visits were made to the website of which 179,659 were unique visitors. This is an increase of 12% for total visits and an increase of 13% for unique visitors compared to the same three months last year.

