Tourism trends quarterly bulletin
Visitor statistics for the peak season 2009: (Q3)

Introduction

This report provides the key findings of the 7 week peak season from 20th July to 6th September. The bank holiday Monday fell on the last possible date this year, 31st August, meaning that this was much later than in recent years. The last time the bank holiday fell at the end of August was in 2004 when it was 30th August. Last year the peak season was a week earlier and ended in August.

Where possible, comparisons are made with previous research dating back to 2002.

Before focusing on travel to and from the Isle of Wight, it is relevant to look at international and domestic travel trends. International travel during July and August declined versus last year in both inbound and outbound markets. There were 13.5 million trips abroad by UK residents which is down by 12% on last year and by 13% on 2007. Trips made to the UK by overseas residents fared slightly better; there were an estimated 6.3 million trips and these were down by 7% versus last year and down 6% versus 2007.[1] Figures for domestic travel[2] (July only –August data is not available) suggest that many people took holidays in the UK rather than abroad: staying trips of all types across the UK were up by 20% and by 24% within England. These increases were driven by increases in holidays and trips to visit friends and relatives; business trips were down in July.

Consumer confidence was up considerably on the peak season last year: in July it registered 61 and in August 63 compared to 50 in August 2008. However, these figures are well below the summer of 2007 when it was in the 90 – 100 range.

Sterling stabilised against the Euro at around €1.15, an improvement on early 2009 but down on 2008.

The Island hosted a range of events to boost tourism, including Cowes Week (1 – 8 August). In addition there was the 'Just add water' advertising campaign to support Island tourism.

During the peak season the total number of visitors to the Island was level with last year at 600 thousand visits. Domestic day visits increased significantly but domestic staying visits were down by 6% versus last year. Key points arising this peak season were:

- There was a marked change in the balance between main and additional holidays taken on the Island: as usual the majority said they were on an additional holiday- 137,000 - but this was down by 23% whilst the proportion stating that they were taking their main holiday of the year was up by 16% to 88,000. Additional holidays are an important market for the Isle of Wight.
- Domestic short breaks lasting 1 -3 nights were level with last year at 65,000 although this is down on 2007 by 8%.
- There was a decline in 4 night holiday stays meaning that 1 -4 night short breaks were down by 13%.
- Holidays of 5 or more nights were down by 10% to 131,000.
- Domestic day trips increased significantly – up 11% to just under a quarter of a million suggesting that people had economised on holidays but taken day trips instead.
- Another sign of people economising on spend was the vast increase in visits to friends/relatives: staying VFR trips were up by 11% to 83,000 and day VFR trips were up by 33% to 34,000.

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, Shanklin weather centre and Medina Valley Centre supply additional data.

1. International travel trends are taken from the IPS, a government survey. Data is not seasonally adjusted.
2. UKTS July data from Visit Britain.

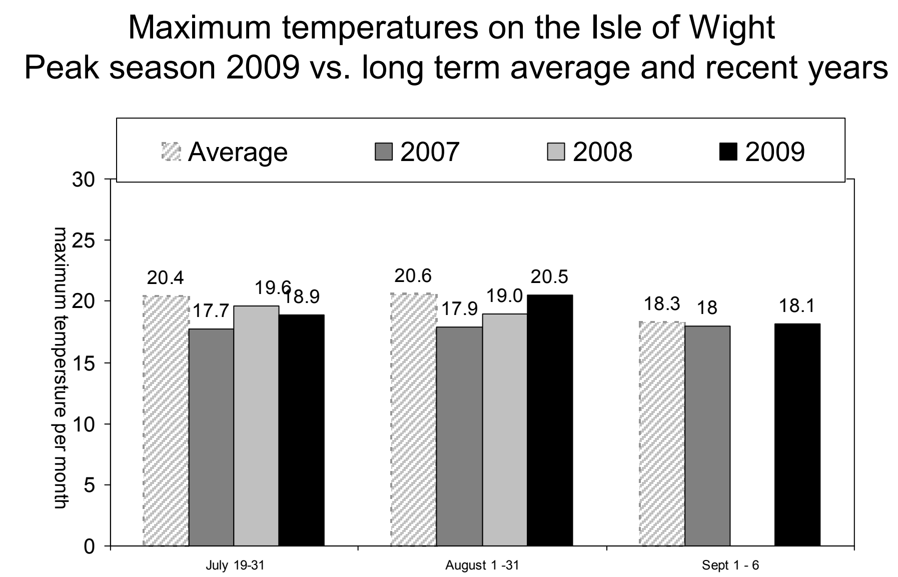
- Visits by overseas residents decreased by 9% - similar to the national trend.
- Staying business visits were down, also in line with the national trend.
- 140,000 new or lapsed (for 5+ years) visitors came to the Island on a leisure trip, 55% were staying visitors. (Domestic and overseas residents combined.)

This mix of visitors to the Island contributed an estimated £100 million to the Island economy during the peak season. This is 9% down on last year (excluding inflation).

Weather

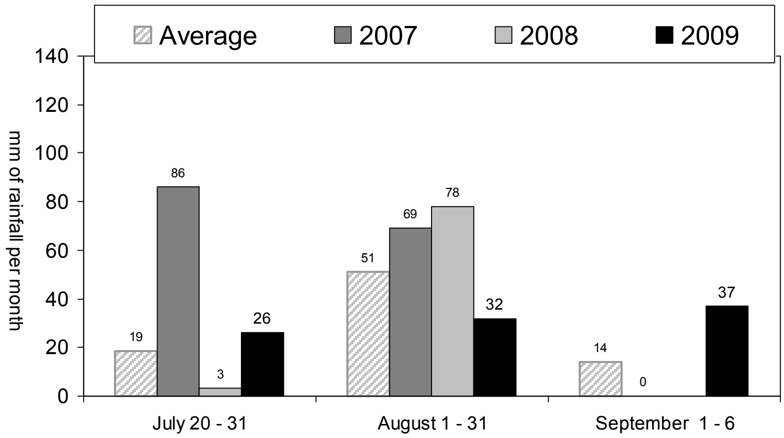
The weather was fairly typical for the time of year:

- Maximum temperatures were slightly below average in the latter half of July and in line with the norm in August and early September.
- Rainfall was slightly above average in July but August was much drier with 37% less than the average amount of rainfall. This was a big improvement on the last two summers. The first few days of September saw wetter weather.
- Sunshine: the Island had average sunshine hours throughout the peak season; this was an improvement versus August 2007 and 2008.



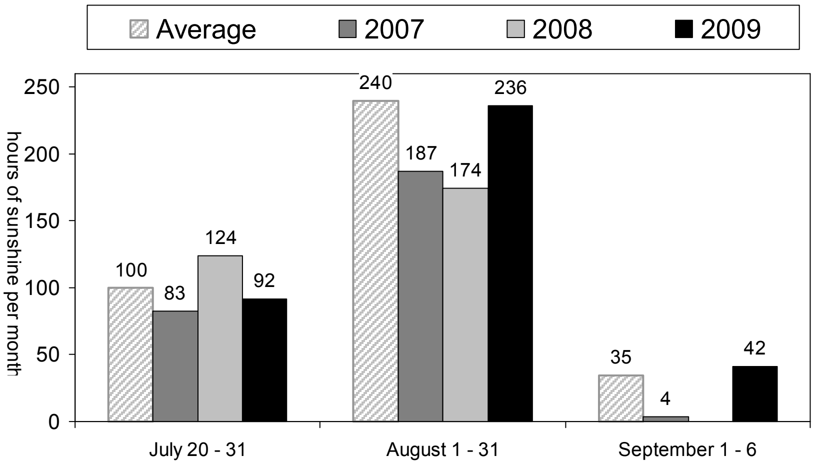
Dates in September vary each year. In 2008 peak season ended in August

Rainfall on the Isle of Wight
Peak season 2009 vs. long term average and recent years



Dates in September vary each year. In 2008 peak season ended in August

Sunshine on the Isle of Wight
Peak season 2009 vs. long term average and recent years



Dates in September vary each year. In 2008 peak season ended in August

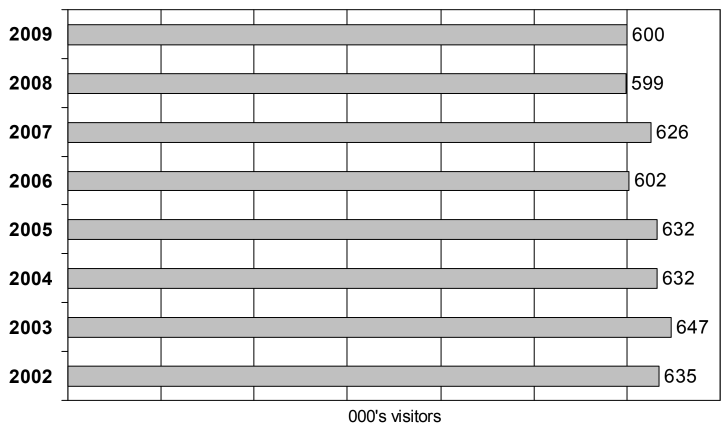
Total travel across the Solent

The total number of return trips (Island residents and visitors combined) across the Solent was just under 900,000 which is level with last year (+1%). During the peak season, two thirds of the journeys were made by visitors to the Island.

Total visitors to the Isle of Wight

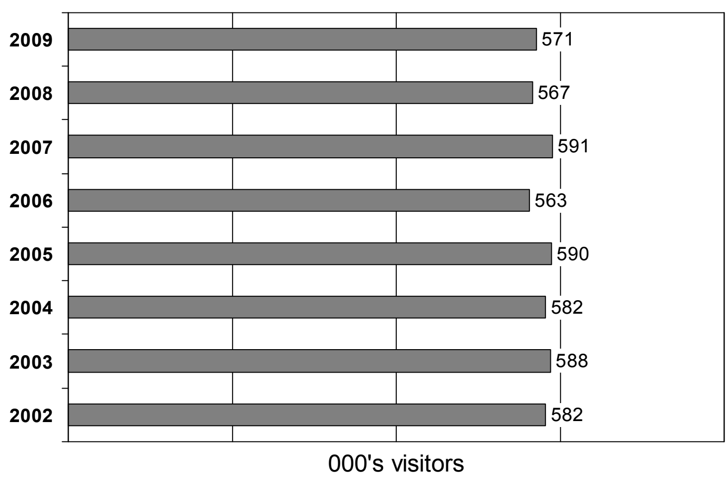
An estimated 600 thousand visits were made to the Island during this seven week peak period. This is level with last year and 2006 but down slightly on 2007 (-4%).

Estimated number of total visitors
Peak season 2009 vs. previous years



The majority of these visits were made by domestic residents; it is estimated that there were just over 570 thousand domestic visits, a similar number to last year (+1%).

Estimated number of domestic visitors
Peak season 2009 vs. previous years



The type of domestic visitor has changed somewhat versus last year, with an increase in domestic day visitors and a decrease in staying visitors.

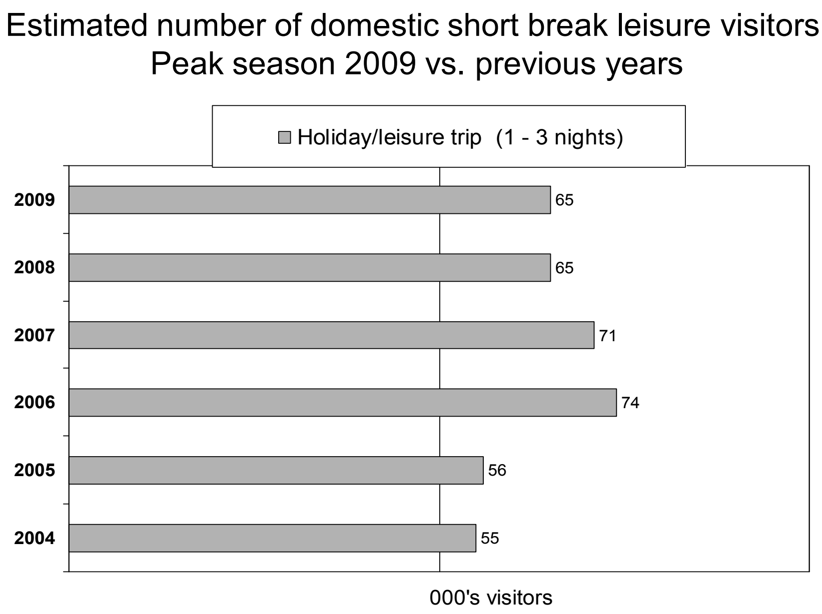
Domestic staying visitors

Holidays and short breaks make up an important part of the visitor base during the peak season. These account for approximately two thirds of domestic staying trips.

Estimated number of domestic leisure short breaks

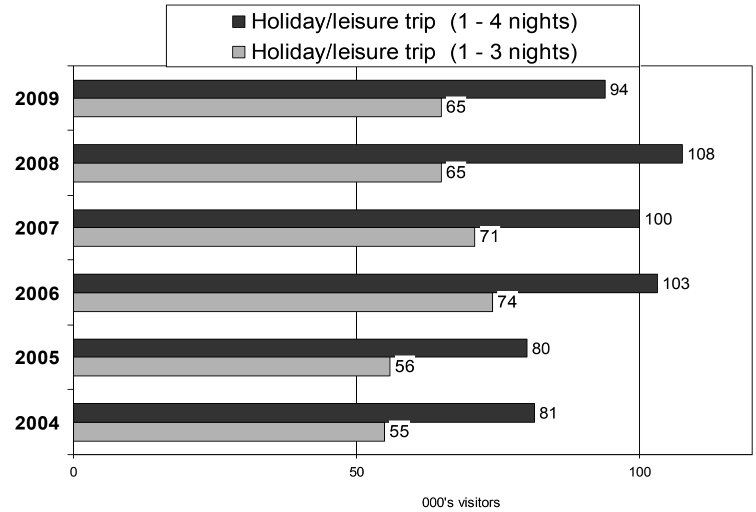
An important customer segment is domestic short break visitors. These can be defined as staying 1 -3 nights or 1 – 4 nights. Over recent years, this monitor has tracked short breaks of 1 – 4 nights due to the length of stay on a ferry ticket to the Island being up to 4 nights. The structure of ferry tickets has changed recently and shorter stays of 1, 2 or 3 nights are now more widely available. It may now be relevant to look at short breaks as 1 – 3 nights stays.

The chart below shows the volume of 1 – 3 night stays. There were an estimated 65,000 stays of 1 – 3 nights, level with last year but down slightly on the volume seen in 2006 and 2007. Looking over the longer term, volumes of 1 – 3 night breaks are ahead of 2004 and 2005.



Adding the fourth night into the analysis shows that much of the year on year change seen in short breaks is due to the length of the trip. The following chart shows 1 - 3 night and 1 – 4 night short breaks. This demonstrates that there has been fluctuation in the number of 4 night stays – these increased last year but declined again this year.

Estimated number of domestic short break leisure visitors
Peak season 2009 vs. previous years

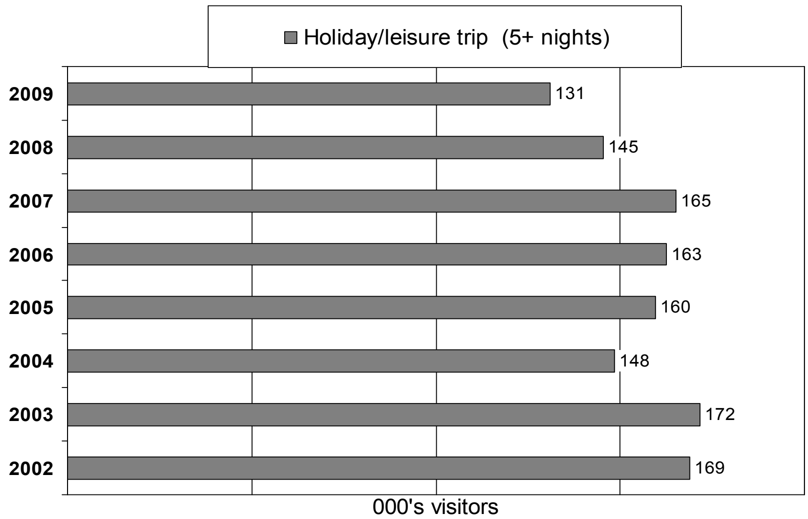


Estimated number of longer stay domestic leisure visitors

During this short peak season, domestic visitors on longer holidays (5+ nights duration) are extremely important to the tourist business. Their value is due to the length of time they spend on the Island, hence their need for accommodation/food, plus their propensity to visit attractions.

It is estimated that 131,000 long holidays were taken on the Island during the peak season. Whilst this is one of the largest group of visitors at this time of year, it is down by 10% versus last year and significantly below 2007 (-21%).

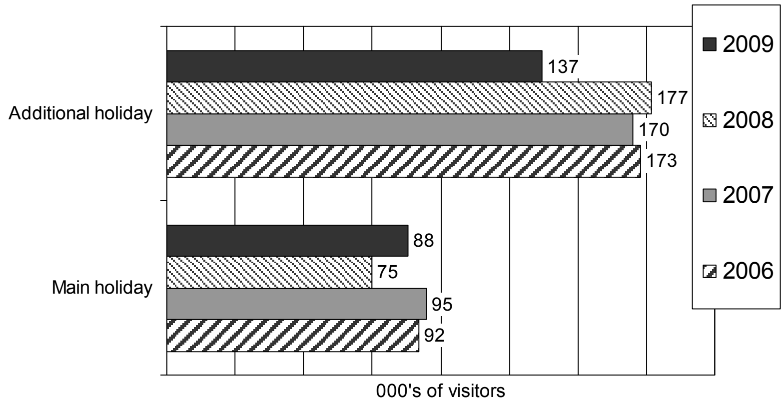
Estimated number of domestic longer stay leisure visitors
Peak season 2009 vs. previous years



Main versus additional holidays

It is worth noting that, although these longer stays are down in volume, the number describing their holiday as their *main* holiday, rather than an *additional* holiday, is up by 16% to almost 90,000. Conversely, the proportion stating they are on an *additional* holiday is down by 23% to 137,000. This behaviour change reflects the current economic situation with fewer people feeling able to take additional holidays.

Main or additional holiday
Peak season 2009 vs. previous years

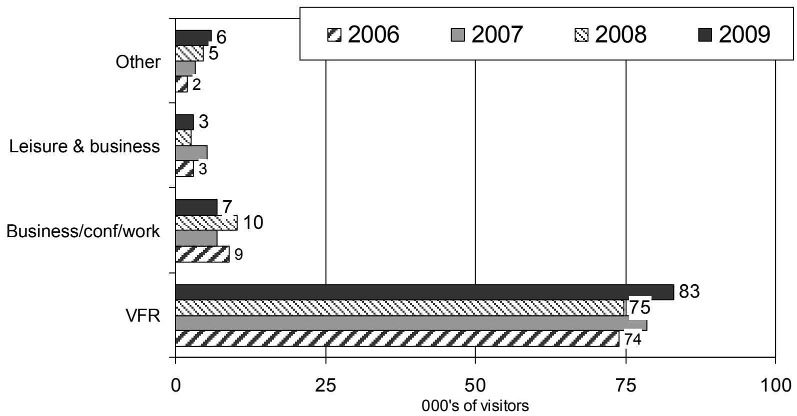


Other domestic staying visitors

Looking at other reasons for visiting the Island, the most important is to visit friends/relatives. There were 83,000 visits, a significant increase of 11% versus last year.

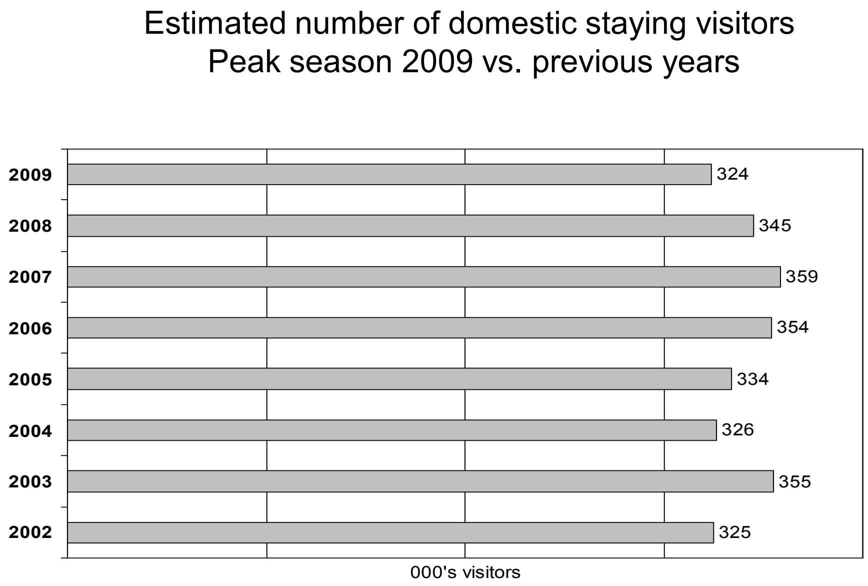
Staying business visits plus combined business and leisure visits are traditionally at a very low level during the peak season – together these reached 10,000 visits, down by a quarter on last two years.

Purpose of other domestic staying visits
Peak season 2009 vs. previous years



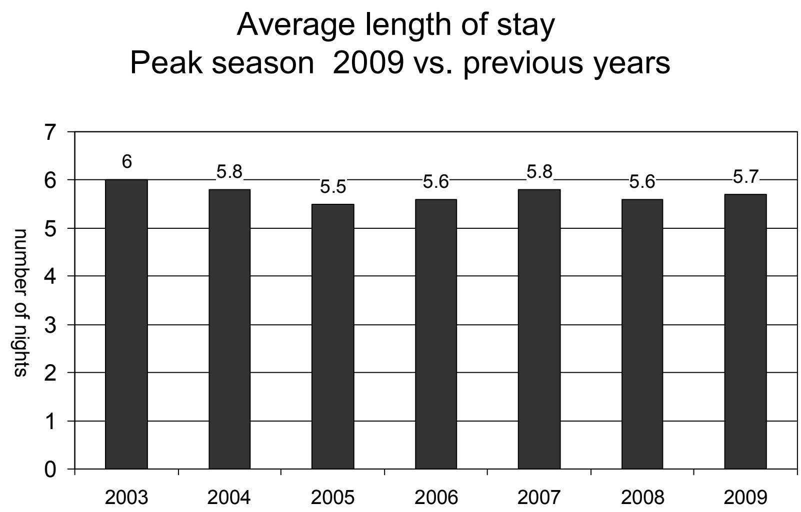
Total number of domestic staying visitors

To summarise domestic staying visits, taking all types of these visits into account, there were an estimated 324,000 staying visitors; this is down by 6% versus last year and 10% below 2007.



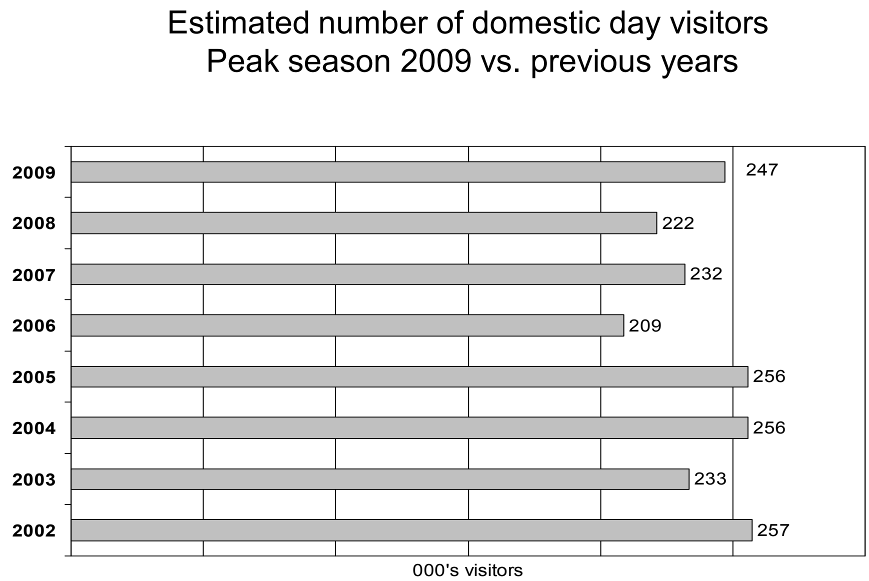
Average length of stay

The peak season average length of all domestic staying trips was 5.7 nights, which is similar to recent years.



Estimated number of domestic day trips

Day visits are an important part of the tourism business during the peak season, whilst day visitors spend less than staying visitors they do bring in extra revenue in this key period. The number of day visits increased significantly to just under a quarter of a million; these were up by 11% versus last year and by 7% on 2007.



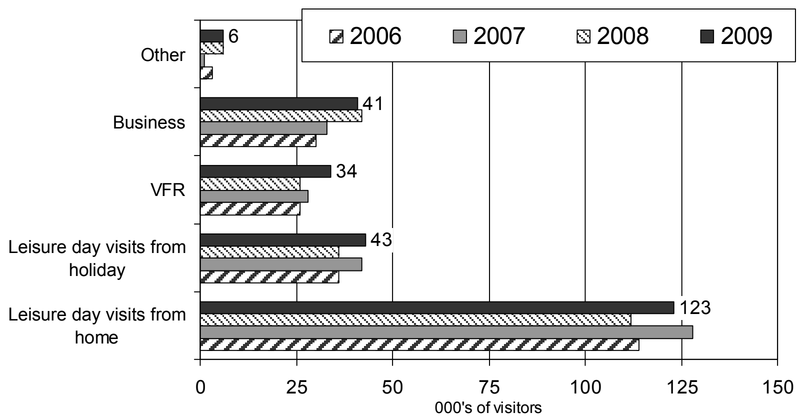
Two thirds of these day trips were leisure day visits (166,000);

- The majority of these were day trips starting from home (123,000) and these increased by 10% versus last year, returning to the level seen in 2007. This increase, taken together with the decline in additional holidays noted earlier, may be due to people opting to take day trips from home rather than take additional holidays.
- The remainder were day trips taken by people whilst they were holidaying nearby on the mainland (43,000) and these increased by 19% versus last year.

In addition, there were 41,000 business and work related day trips – this is level with last year.

Day trips to visit friends and relatives tend to be at a low level in the peak season but, unusually, these did increase by 33% on last year to reach 34,000 and are now at their highest level in recent years. This suggests that, increasingly, people chose to take a day trip to visit friends and relatives, perhaps as an economical option.

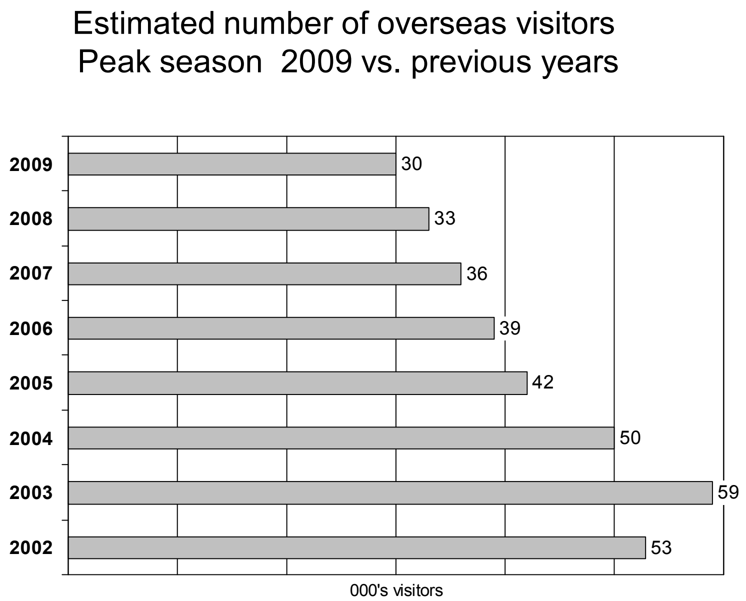
Purpose of day visits
Peak season 2009 vs. previous years



Estimated number of visitors from overseas residents

The number of residents from overseas visiting the Island in the peak season has been in gradual decline for several years and this summer the trend continued with overseas residents dropping to an estimated 30,000. This was a 9% fall.

As a proportion of total visitors, visitors from overseas make up approximately 5% of the total at this time of the year.



The fall in visitors from overseas was due to a decline in staying visitors, down by 3,000. Day visits by overseas visitors remained at 11,000.

000's trips	2005	2006	2007	2008	2009
Staying trips	23	26	17	21	18
Day trips	18	13	19	11	11
N.B. These estimates are based on small sample sizes					

Main reasons for these visits included:

- Holidays/short breaks – 11,000;
- Leisure day visits – 10,000;
- Visits to friends/relatives primarily staying trips – 7,000.

N.B. All estimates of overseas residents visiting are based on small sample sizes which results in fluctuations from year to year

New versus repeat visits to the Island

Day and staying leisure visitors are asked when they last visited the Isle of Wight, if at all. The following data excludes those visiting friends and relatives as these are, by definition, likely to be repeat visitors. (Only 5% of VFR visitors were on their first visit to the Island.) The survey identifies first time visitors, those who are recent repeat visitors (in the last year and within the last 5 years), and lapsed visitors who have visited before but not in the last 5 years.

A substantial proportion of day and staying leisure visitors (excluding VFR), around two fifths, made two or more trips to the Island in a year. The proportion of repeat visitors increased slightly this year. This demonstrates a high degree of satisfaction with the Island as a leisure destination. At the same time, the Island is successful in attracting new and lapsed customers.

- Day visitors: one fifth of leisure day visitors were on their first trip to the Island, level with last year and up slightly on the previous year. The proportion of long term lapsed (5+ years ago) visitors remained level with the last two years, at 16%, but recently lapsed (1 – 5 years ago) visitors decreased slightly to 21%.
- Holidays/short breaks: just under a fifth, 18%, were on their first visit, in line with the last two years. Recently lapsed and long term lapsed visitors were level with last year at 27% and 16%.

	Leisure Day visitors (not VFR)		
	2007	**2008**	**2009**
First visit to Island	16%	19%	20%
Visited before in last 12 months	48%	39%	42%
Visited before 12 months to 5 years ago	22%	25%	21%
Visited before but more than 5 years ago	15%	17%	16%

	Short break/holiday visitors (not VFR)		
	2007	**2008**	**2009**
First visit to Island	18%	17%	18%
Visited before in last 12 months	48%	38%	40%
Visited before 12 months to 5 years ago	19%	27%	27%
Visited before but more than 5 years ago	16%	18%	16%

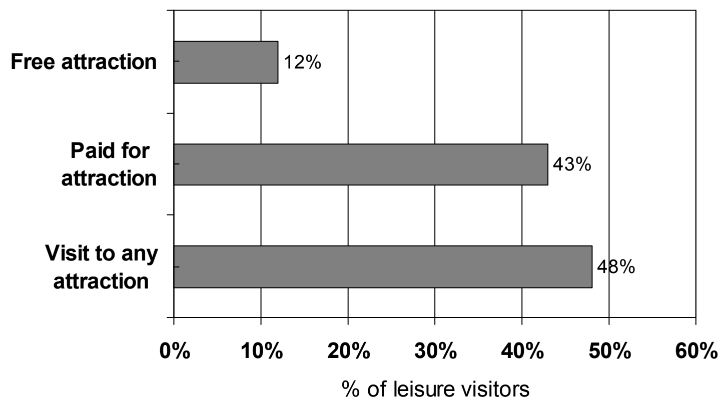
These visitor patterns indicate that just over 140,000 new or lapsed (5+ years) visitors came to the Island during the peak season; 55% were higher value holiday/short break visitors, the remainder were day visitors.

000's new/lapsed 5+ years visitors	**Leisure Day visitors (not VFR)**	**Short break/holiday visitors (not VFR)**
First visit to Island	34	41
Visited before but more than 5 years ago	28	37
All new or lapsed (5+ years) visitors	63	78

Visits to attractions

Almost half of the leisure visitors went to an Island attraction. 43% visited attractions charging a fee and 12% a free attraction. 6% said they visited both types of attraction.

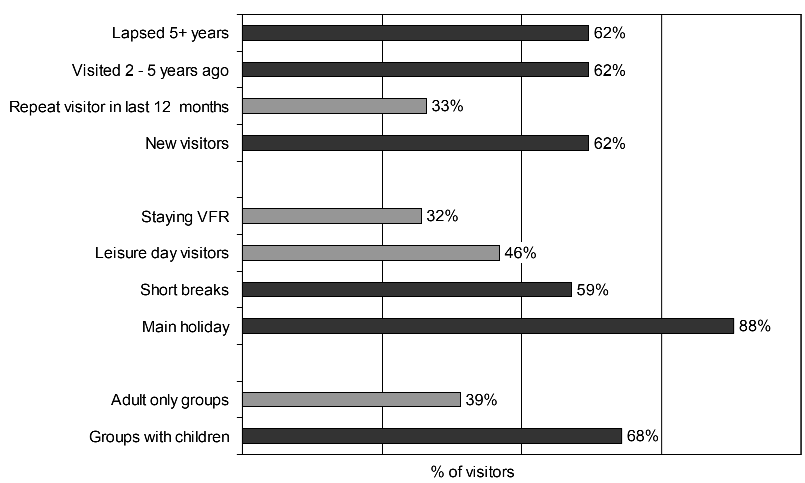
Estimated visits to types of attractions
Peak season 2009



Propensity to visit attractions differs considerably between various visitor segments:

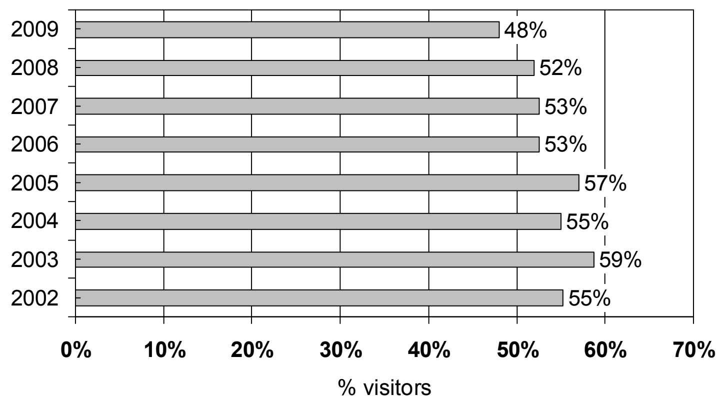
- New and lapsed visitors to the Island were much more likely to visit attractions than regular visitors (on a second visit in the last 12 months);
- Visitor groups with children were much more likely than adult only groups to visit an attraction;
- Holiday and short break visitors were more likely to visit attractions than leisure day visitors and those visiting friends/relatives.

Estimated visits to attractions
Peak season 2009



Looking at the trend over the longer term, visits to any attractions have dropped slightly and are now at a lower level than in the last seven years. The increase in repeat visitors, noted above, is likely to have contributed to this decrease as these visitors have a lower propensity to visit attractions. There is perhaps an opportunity for attractions to target these repeat visitors with tailored promotions or repeat visitor packages. The increase in VFR visitors will also have impacted on visits to attractions as these visitors also have a low propensity to go to attractions.

Estimated visits to any type of attraction
Peak season 2009 vs. previous years



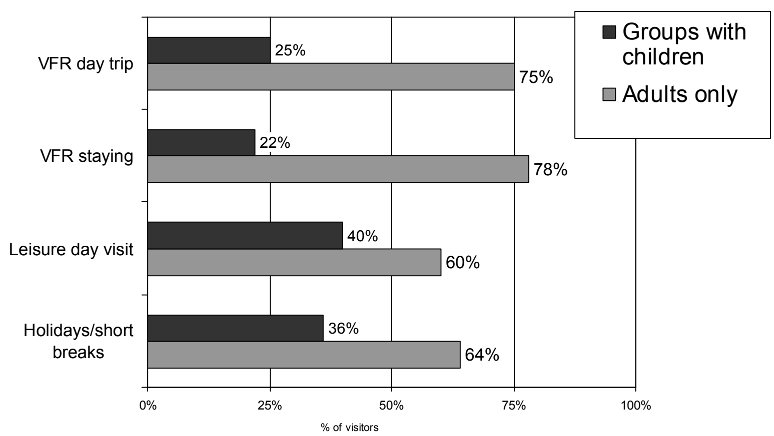
Importance of families

Visitors are asked about the presence of children in their travelling party. Children up to 14 are noted. This age was selected as it was felt that children's needs/desires change considerably above this age.

Adult only groups dominate the visitor market, even in this short season during the school holidays. The highest incidence of families was amongst the two biggest visitor groups, those taking a holiday/short break and those on a leisure day visit: almost two fifths had children in their group.

Amongst those visiting friends/relatives, the presence of children was lower.

Presence of children in party
Peak season 2009 (domestic visitors)



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. This question was added to the survey in 2005.

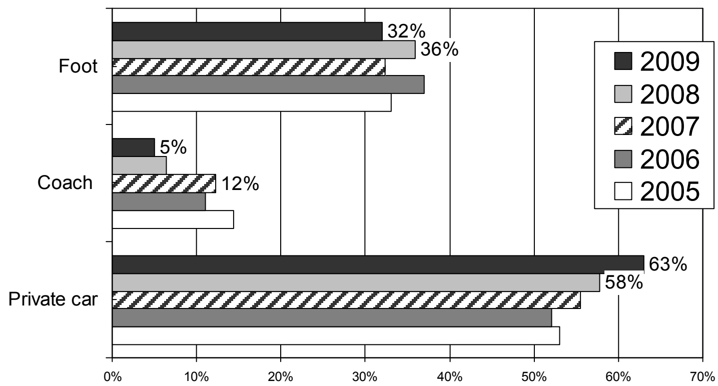
Mode of travel on board the ferry

The increasing tendency to travel to the Island by car, seen over the last three years, has continued and this summer an estimated 63% travelled to the Island by car. This is up by 10 points since summer 2005, when this data was first collected.

Over the last 5 years around a third have travelled on foot; this summer was in line with this (32%).

Travel by coach was similar to last year at 5%, which is less than half the proportion travelling by coach in earlier years.

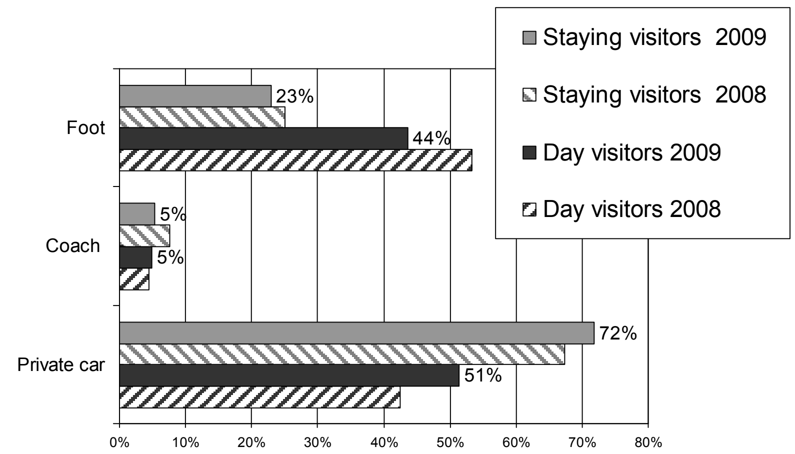
Mode of travel to/from the Island
Peak season 2009 vs. previous years



There are significant differences in the travel patterns of day and staying visitors:

- Amongst staying visitors the car dominates travel: over 7 out of 10 visitors arrived by car and this proportion has increased by 5 points since last year. There was a slight decrease in staying visitors arriving on foot, now at 23%. Travel by coach continued at a negligible level.
- Amongst day visitors there has been greater change: the proportion who arrived on foot has fallen by 9 points to 44% of day visitors and there has been a corresponding increase in travel by car.

Mode of travel to/from the Island
Peak season 2009 vs. 2008

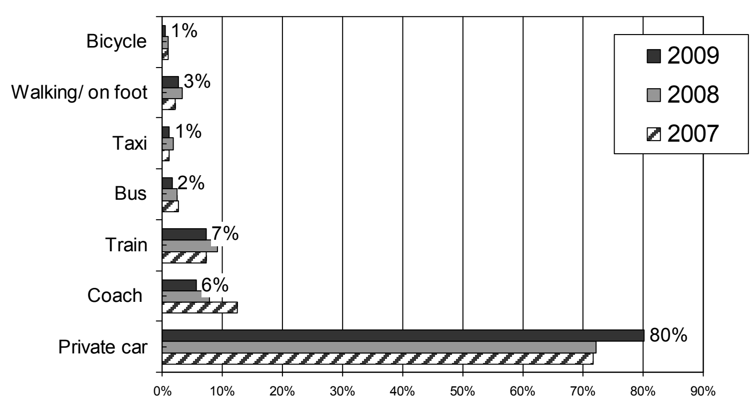


Mode of transport to the mainland terminal

As expected, the majority of visitors travelled to the mainland port by car but this proportion is up by 8 points on last year to 80%. Train, coach and bus travel were all down very slightly.

Choice of transport to the mainland terminal by day and staying visitors was very similar.

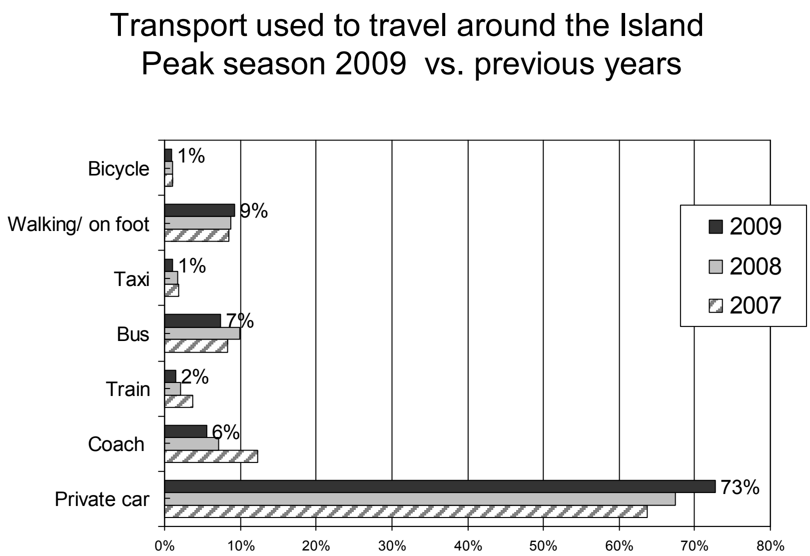
Transport used to travel to the mainland terminal
Peak season 2009 vs. previous years



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.

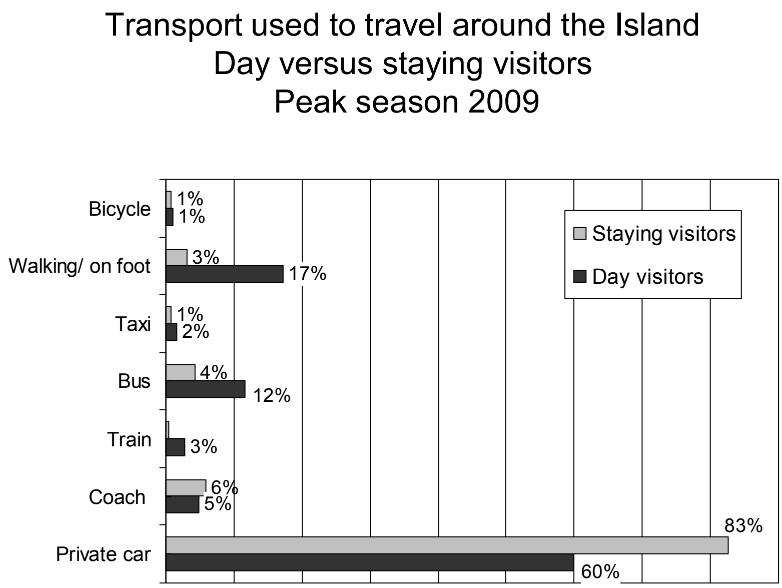
Mode of transport to travel around the Island

Once on the Island, most visitors relied on their car to get around and the increased dependence on the car noted earlier continued. Use of local bus services and the train dropped very slightly. 9% walked, in line with previous years.



Choice of travel differs between day and staying visitors:

- Day visitors were much more likely than staying visitors to walk (17% vs. 3%); they also made more use of local buses. However 60% of day visitors travelled around by car.
- Staying visitors travelled primarily by private car, with 83% relying on a car to get around the Island.



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 almost £100 million. Despite maintaining the total number of visitors to the Island, the value of tourism is down on last year's peak season by 9% due to the change in the mix of visitors.

The value of staying trips is estimated to be worth £89 million; the vast majority of this, £82 million, was from domestic staying trips. The value of all staying trips is estimated to be down by 11% due to the decline in holidays and visitors from abroad.

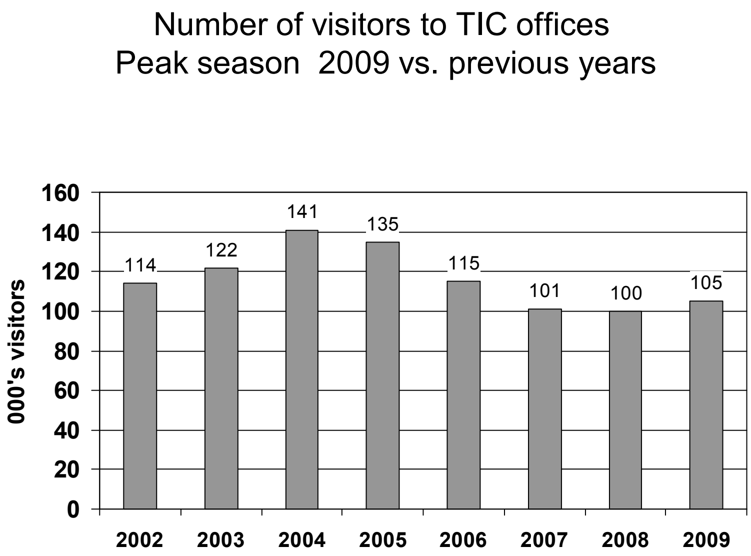
Day trips contributed an estimated £10 million; again most of this was derived from domestic day trips. The value of day trips was up by 9% on last year due to an increase in the number of domestic day visitors.

Staying trips	
All domestic staying trips	£82 million
All overseas staying trips	£7.5 million
All staying trips	£89 million
Day trips	
All domestic day trips	£9.3 million
All overseas day trips	£0.4 million
All domestic day trips	£10 million

N.B. Spending by visitors is based on visitors arriving by ferry; base value figures are taken from UKTS estimates produced for the Isle of Wight and the GB Leisure Day Visits survey estimates. These are adjusted annually for inflation using the RPI (all items RP04).

Activity at Island Tourist Information Centres

There were 105,000 visitors to the Island TIC's during the peak season, which is a 5% increase on last year. The average spend per head was £11.48, an increase of 34% on last year (£8.59); this is due to the sale of more high value tickets for events such as Bestival.



islandbreaks.co.uk website activity

There were 144,800 visits to the website during the period from 20th July to 6th September. This is a fall of 10% versus the peak season last year. Although website visits have fallen each month since May, it is the frequency of visits that has declined recently - unique visitors to the site increased in the months of August and September.

Occupancy statistics

The Isle of Wight occupancy statistics for the peak summer season 2009 will be issued in a separate bulletin.