

## Tourism trends quarterly bulletin Visitor statistics for the autumn 2007: (Q4)

### Introduction

This bulletin provides the key findings of the tourism monitor for the autumn, which was 3<sup>rd</sup> September to 31<sup>st</sup> December 2007. Where possible comparisons are made with previous research to provide the longer term trend in tourism performance on the Isle of Wight.

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

- There were 23.4 million trips abroad by UK residents during the period September to December, which is an increase of 4% on the same period in 2006. Expenditure on these trips abroad increased slightly ahead of this at 6%.
- Incoming visits to the UK made by overseas residents increased by almost 8% to reach 11.5 million trips; expenditure by these visitors increased in line with trips.
- Domestic trips (1+ nights) taken within the UK declined by approximately 5% to 40 million trips (September to December).

Looking at the Isle of Wight, the autumn period started with the now well established and high profile Bestival music festival in early September; this was followed by the classic car show and then the cycling festival later that month - a 9 day event. For the first time since its inception, the Wight Air festival was during the summer peak season rather than in October.

In total there were an estimated 690,000 visits to the Island during the autumn, this is an increase of 5% versus last year. There have been some changes in the mix of visitors since last year:

- Domestic staying leisure trips increased by 4% to just under 380,000. This is in contrast to the 5% decline in domestic trips nationally, noted above;
- Domestic short breaks reached 150,000, level with last year but below the previous two years. These accounted for 40% of all staying trips;
- Domestic longer holidays (5+ nights) increased by 16,000 to 62,000;
- Staying VFR trips decreased slightly to 112,000 (-5%) but day VFR trips were level with last year at 64,000;
- Total domestic day trips exceeded 280,000, level with last year and confirming the end of the downward trend in day trips;
- 30,000 overseas residents visited the Island, which is double the estimated number last autumn;
- An estimated 95,000 new or lapsed visitors came to the Island on a leisure trip, over two thirds of whom were the higher value short break/holiday visitors;
- 36% of the leisure visitors went to an attraction, the majority of whom chose an attraction charging an entrance fee.

This autumn, it is estimated that tourism contributed £92 million to the Island economy. This is an increase of 10% versus autumn last year (excluding inflation) and in contrast to the value of domestic trips nationally which showed no increase.

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. Medina Valley Centre supply additional data on weather statistics.

International travel trends are taken from the IPS, a government survey: figures shown are not seasonally adjusted.

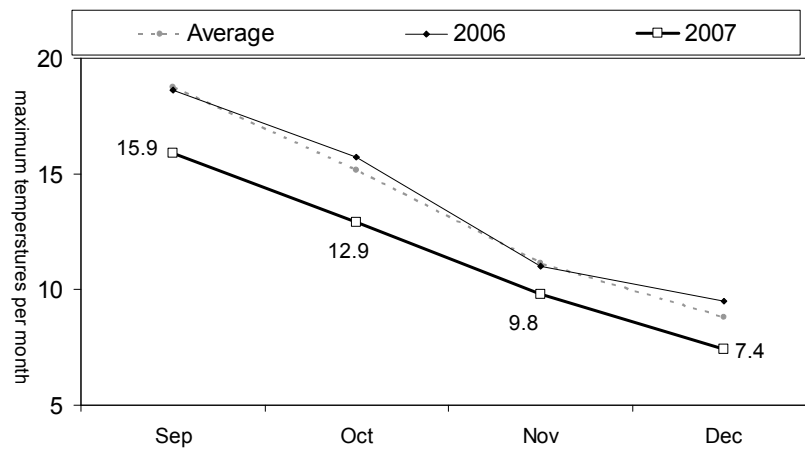
National travel trends are taken from UKTS, a survey conducted on behalf of Visit Britain.

## Weather

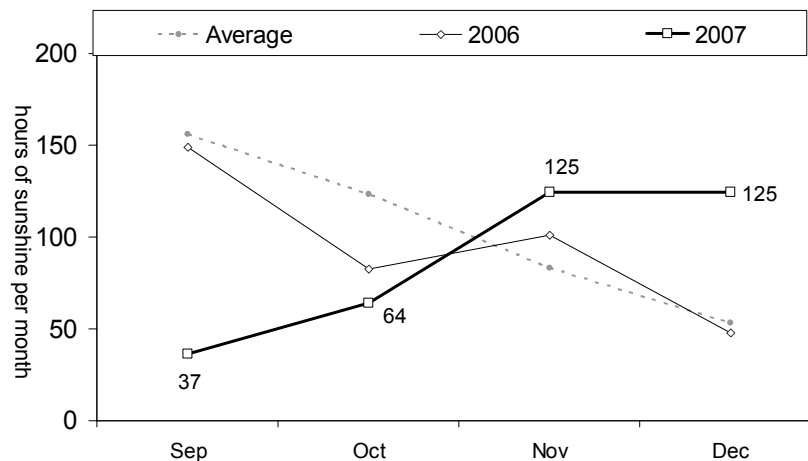
Following on from the poor weather across the UK during late spring and early summer, weather during the autumn was more in line with expectations for the time of year:

- Maximum temperatures were slightly below both the average and 2006 throughout the autumn period.
- Sunshine hours: in keeping with the slightly cooler weather, there was less sunshine than expected in September and October, however the weather improved considerably in November and in December it was much sunnier than usual.
- Rainfall was above average in September (+73%) and average for the time of year during October and November. The December sunshine meant that this month was drier than average and much improved on December 2006.

Maximum temperatures on the Isle of Wight  
Autumn 2007 vs. 2006 and long term average

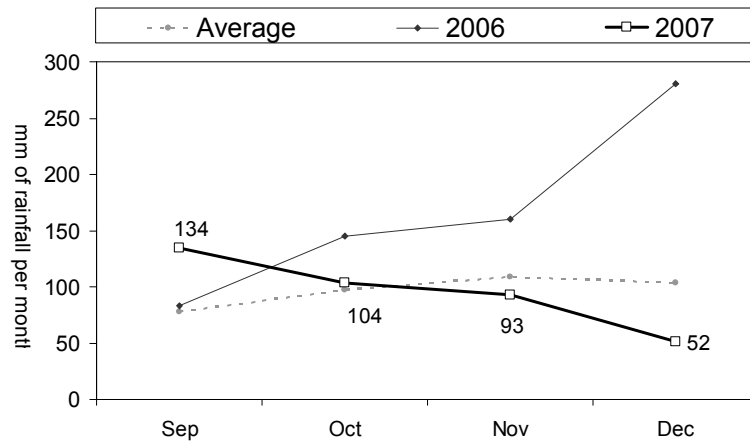


Sunshine on the Isle of Wight  
Autumn 2007 vs. 2006 and long term average



Weather data is supplied by Medina Valley Centre

### Rainfall on the Isle of Wight Autumn 2007 vs. 2006 and long term average

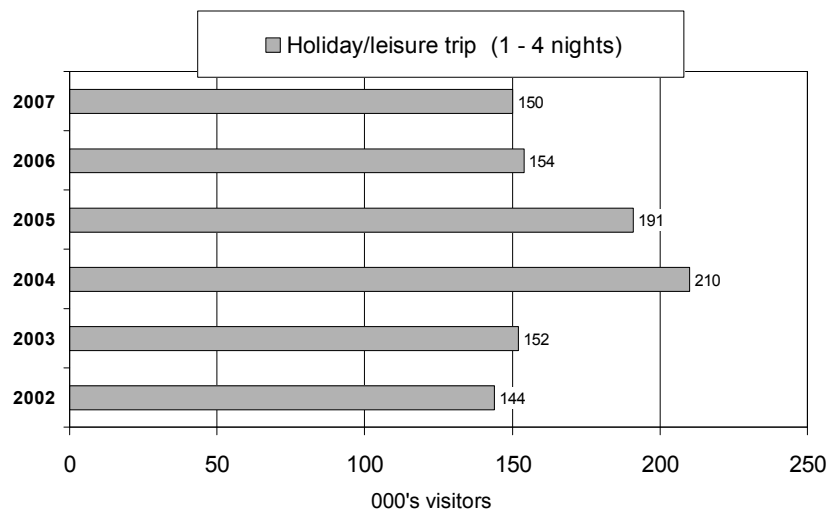


Weather data is supplied by Medina Valley Centre

### Estimated number of domestic leisure short breaks

The holiday/staying leisure market is dominated by short stays at this time of year; these accounted for 40% of all domestic staying visits. There were an estimated 150,000 short leisure breaks - this is in line with the number seen last autumn and 2002/03 but below the high level seen in 2004 and 2005.

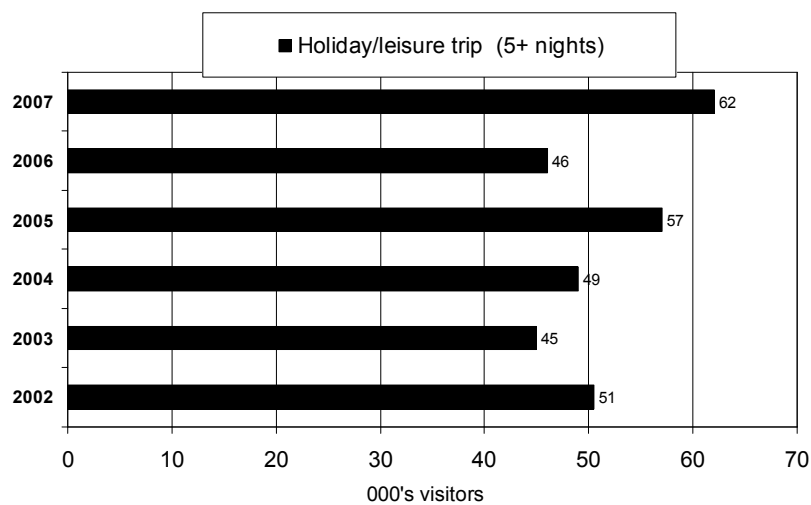
Estimated number domestic short break leisure trip visitors  
Q4 2007 vs. previous years



### Estimated number of longer stay domestic leisure visitors

Longer stay trips, of 5+ nights duration, are of less significance at this time of year, accounting for 16% of staying trips only. There were an estimated 62,000 of these, which is an increase of 16,000 trips versus last year, taking these to their highest level during autumn in the last 6 years.

Estimated number domestic longer stay leisure trip visitors  
Q4 2007 vs. previous years



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

At this time of year the other significant type of trip is to visit friends and relatives: these make up approximately a third (30%) of all domestic staying trips. These decreased slightly versus last year (-5%) but over the longer term are up by around 15%.

	2002	2003	2004	2005	2006	2007
000's	97	97	87	94	118	112

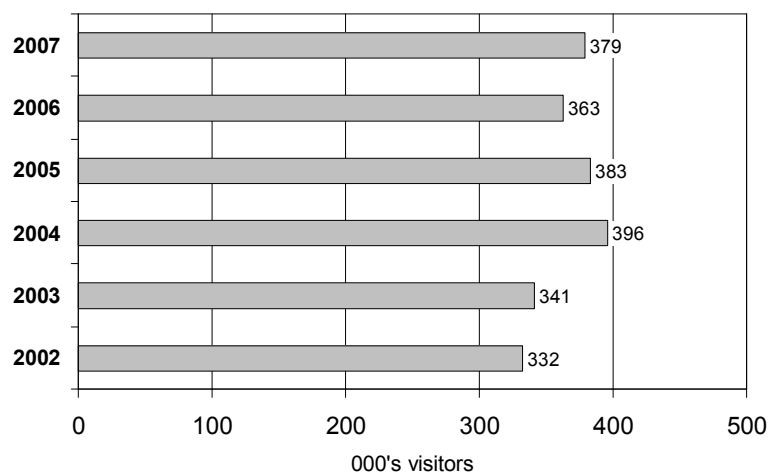
Business trips are at a comparatively low level (32,000 business plus combined business and leisure trips) accounting for an estimated 8% of domestic staying trips.

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

The total number of domestic staying visitors increased slightly (+4%) versus last year and returned to a similar level to 2005. This compares favourably to domestic staying trips across the UK, which declined by approximately 5% over the same period.

Over the six year period illustrated below, domestic staying visits to the Island have increased by 14%.

Estimated number of domestic staying visitors  
Q4 2007 vs. previous years

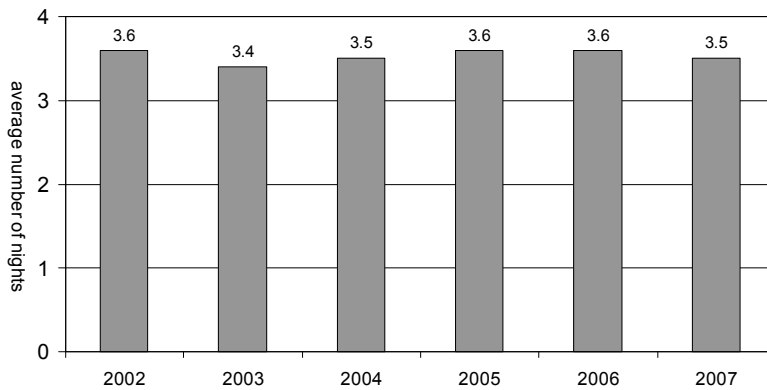


### **Average length of stay**

The average length of all domestic staying trips during the autumn has remained fairly constant over the six year period illustrated; this year it was at 3.5 nights.

This resulted in an estimated 1.3 million domestic visitor bednights required on the Island; this is level with the number last autumn.

### Length of stay Q4 2007 vs. previous years



### Estimated number of domestic day trips

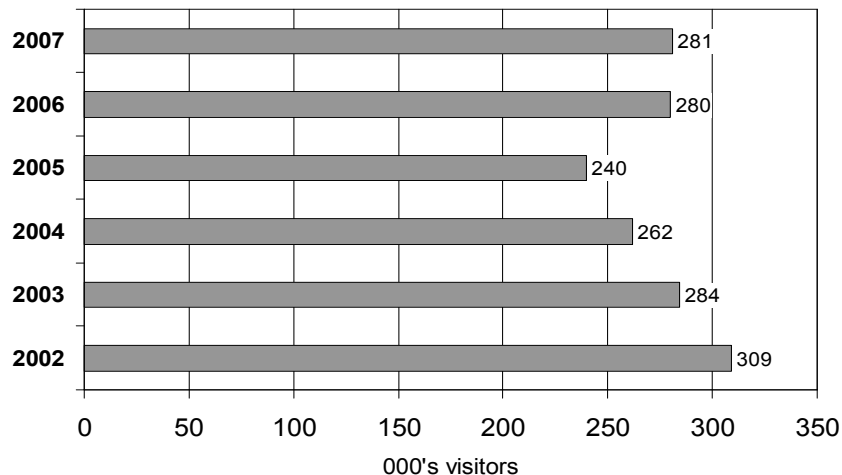
The number of day trips this autumn exceeded 280,000 which is level with last year and confirms the end of downward trend seen between 2003 and 2005.

The most important type of day trip in the autumn is leisure day trips; there were an estimated 117,000 of these, which is over 40% of all domestic day trips. This is an increase of almost 20% on the previous year, which in turn had a large increase in leisure day trips. It is these leisure day trips which have accounted for the recovery in the total domestic day trip volumes.

In addition there were:

- 88,000 business trips (-15% vs. last year);
- 64,000 VFR day trips - level with last year, which was itself an increase of 22% on 2005.

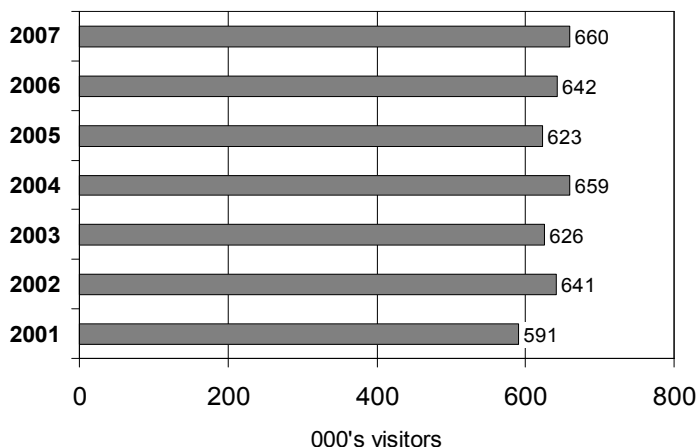
### Estimated number of domestic day visitors Q4 2007 vs. previous years



### Estimated number of domestic visitors

An estimated total of 660,000 visitors went to the Isle of Wight during autumn. This is up slightly versus last year (+3%) and 2005 (+6%), taking domestic visitor numbers back to the volume seen in 2004.

Estimated number of domestic visitors  
Q4 2007 vs. previous years

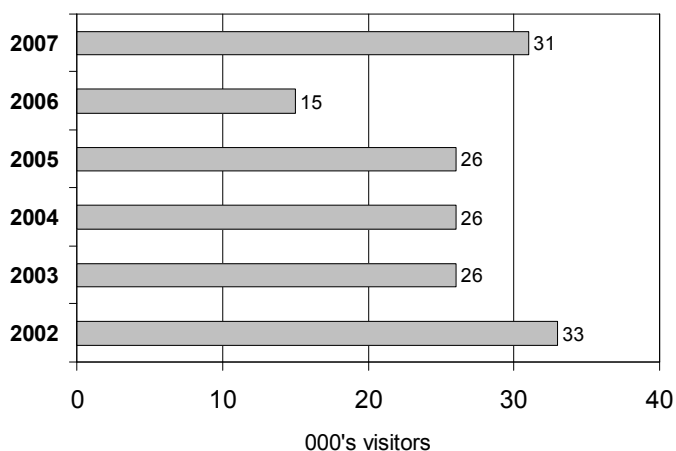


### Estimated number of visits made by overseas residents

There are relatively few visits by overseas residents at this time of year, the important periods for these visitors being spring and the peak season. However this year it is estimated that 30,000 visits were made by overseas residents, reversing the decline seen last year and returning to the numbers seen in 2002.

N.B. The base for estimating this number is small.

Estimated number of visits by overseas residents  
Q4 2007 vs. previous years

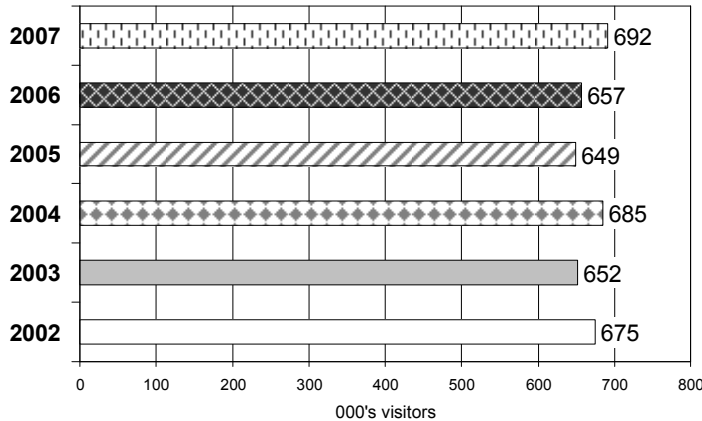


NB. Estimates of abroad visitors based on small sample

**Estimated total number of visits**

Total visits to the Island exceeded 690,000, which is the highest number recorded in the six years illustrated. This is up by 5% on last year and almost 7% ahead of 2005.

Estimated number of total visitors  
Q4 2007 vs. previous years



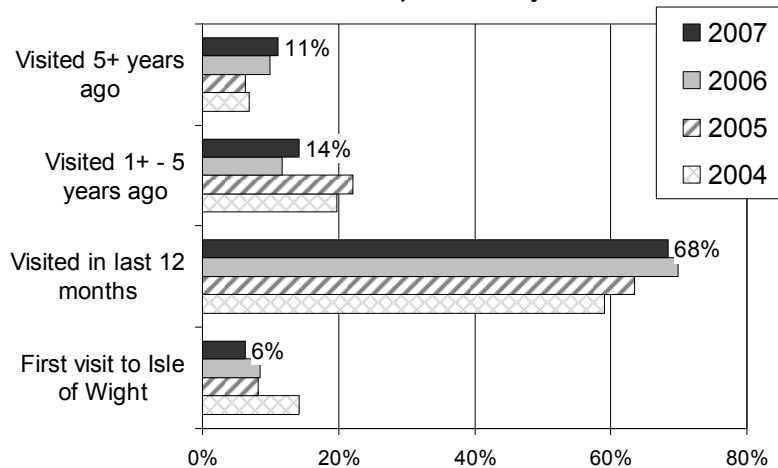
**New visitors versus repeat visitors to the Isle of Wight**

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):** at this time of year most visitors are repeat visitors: only 6% were on their first visit - the seasons for attracting new day visitors are spring and summer. 11% 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 and many were regular visitors: two thirds were on their second or subsequent visit in the last 12 months.

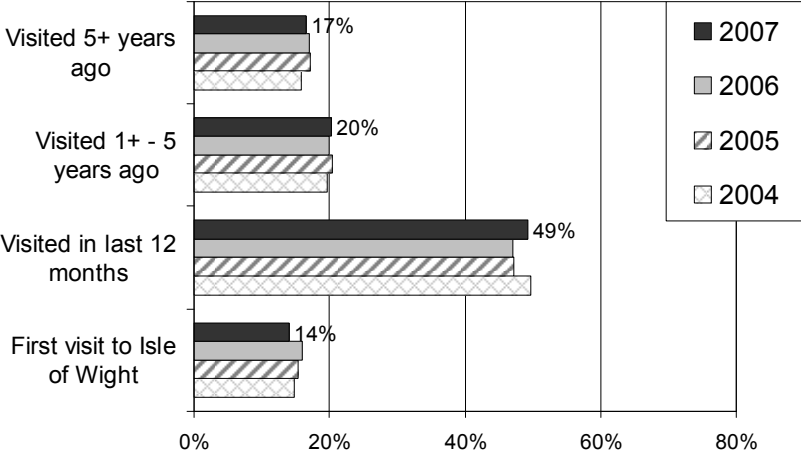
New vs. repeat visitors  
Leisure day visitors (starting from home)  
Q4 2007 vs. previous years



NB. Estimates based on small samples

**Leisure staying visitors:** these visitors were more likely than day visitors to be new to the Island (14%) or returning after 5+ years (17%); however the majority were regular visitors with half having already visited in the last 12 months and another fifth having visited 1 to 5 years before.

New vs. repeat visitors  
 Holiday/short break visitors Q4 2007 vs. previous years



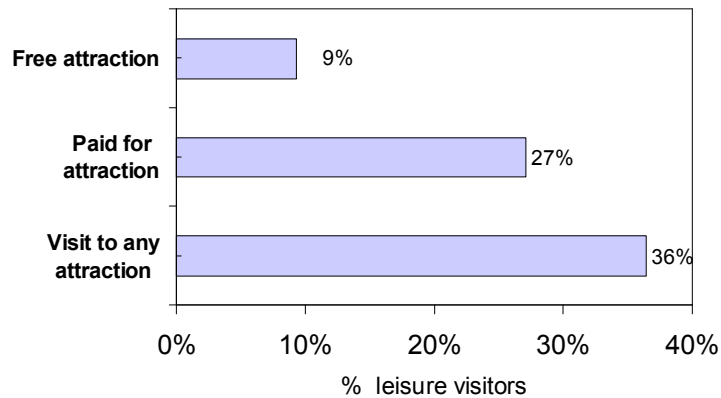
Based upon these visitor patterns it is estimated that approximately 95,000 new or lapsed (5+ years) visitors went to the Island during autumn. These were primarily the higher value staying leisure visitors.

	Leisure day visitors (not VFR)	Short break/holiday visitors (not VFR)
000's new/lapsed visitors	30	65

### Visits to attractions

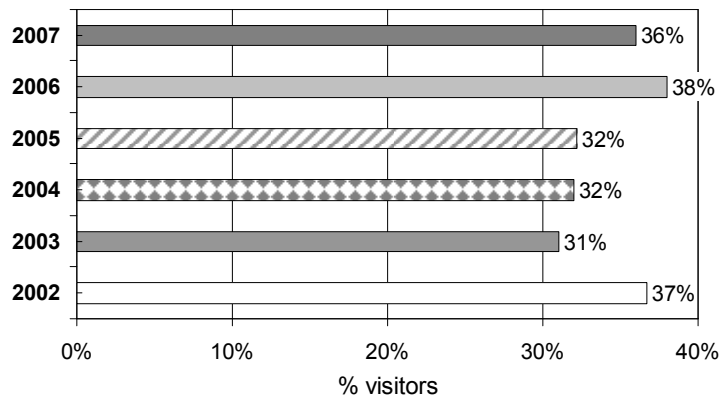
Over two thirds (36%) of leisure visitors went to an attraction; those with an entrance fee were most popular, visited by 27; far fewer (9%) visited a free attraction.

Estimated visits to types of attractions  
Q4 2007



The following chart shows the trend over time: the proportion visiting attractions is similar to last year which was well ahead of the previous three years.

Estimated visits to any attractions  
Q4 2007 vs. previous years



### Mode of transport

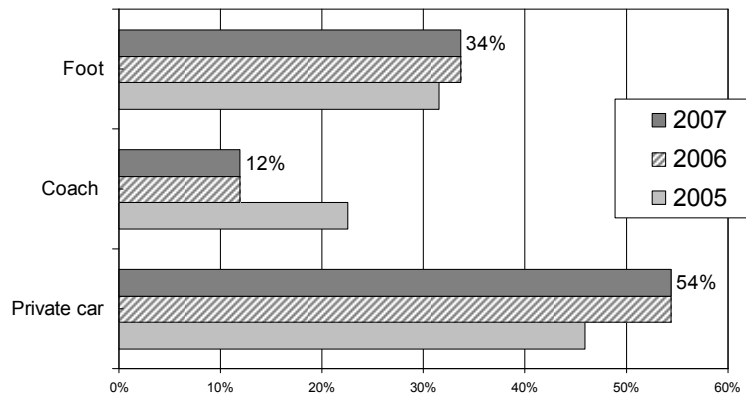
All visitors are asked how they travel to the mainland terminal and around the Island. Mode of travel on board the ferry is also recorded and used to estimate the overall split between visitors travelling as car, coach and foot passengers.

### Mode of travel on board the ferry

Travel by private car continues to be the most popular way to travel to/from the Isle of Wight, with over half the visitors (54%) travelling by car. A further 12% travelled by coach. One third travelled to the Island without a vehicle, although some of these did use a car to get to the departure port and/or will use a car once on the Island.

Travel by all three modes is level with that seen last year meaning that the shift from coach to car travel, which occurred last year, has remained in place.

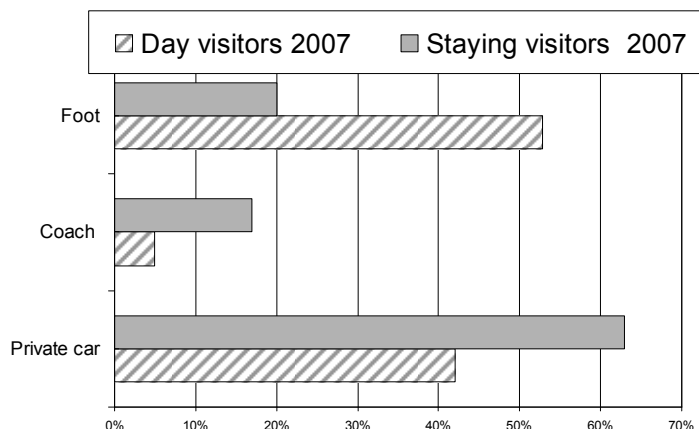
Mode of travel to/from the Island  
Autumn 2007 vs. previous years



There are significant differences between the selected mode of travel by day and staying visitors:

- Staying visitors were much most likely to travel by car with 63% selecting this mode. 42% of day visitors travelled by car.
- A minority of staying visitors travelled by coach (17%); this is in line with last year but down from 32% in autumn 2005. Coach travel is rarely used by day visitors.
- Over half of day visitors came on foot but only 20% of staying visitors.

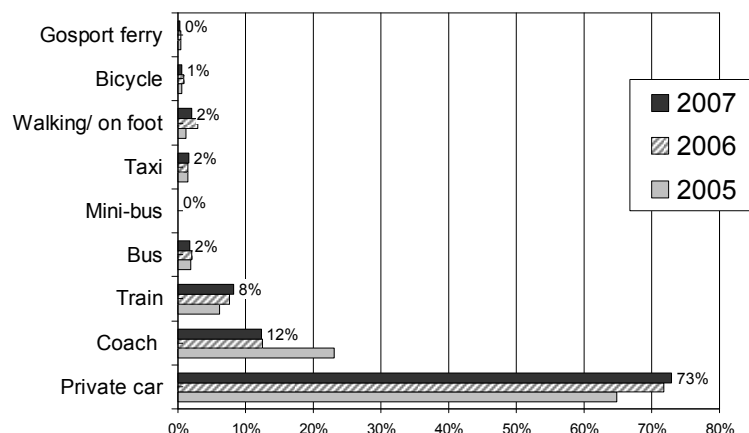
Mode of travel to/from the Island  
Autumn 2007



**Mode of transport to the mainland terminal**

Whereas travel on board the ferries was in line with last year, travel to the port shows a slight shift towards travel by private car: this suggests that an increasing proportion opted to leave their car on the mainland. Coach travel was level with last year and therefore down on 2005.

Transport used to travel to the mainland terminal  
Autumn 2007 vs. previous years



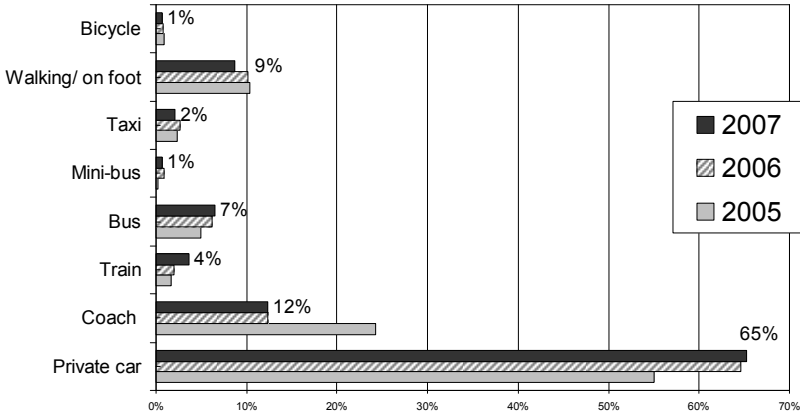
N.B. It is assumed that anyone travelling with their own car on the ferry uses that as their main mode of transport to the port. Likewise, those travelling with a coach on the ferry are assumed to travel by coach to the port.

There was very little difference in the choice of transport to the mainland terminal by day and staying visitors: both were most likely to use a private car and 8% of both groups arrived by train. The only real difference was the increased tendency to travel by coach amongst staying visitors (17%) versus day visitors (6%).

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

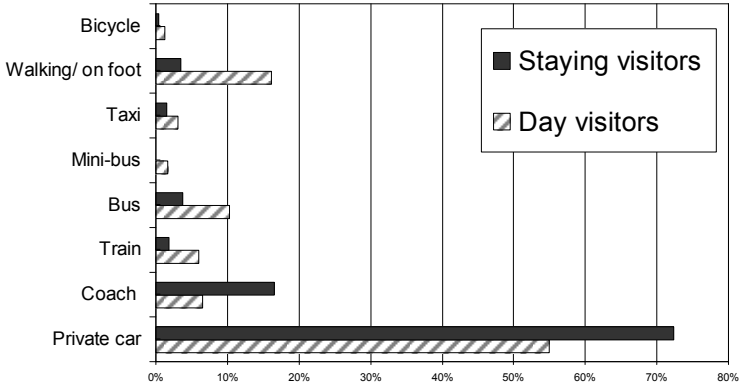
On reaching the Island, the majority continued to travel around by private car, either their own or that of a relative (65%), and the increase in car use at the expense of coach seen last year has remained. 9% were walking; use of local public transport was at a low level.

Transport used to travel around the Island  
Autumn 2007 vs. previous years



Looking at the differences between day and staying visitors, staying visitors were more likely to travel by private car and coach; the majority of those walking, cycling or using public transport (the bus/train services), were day visitors.

Transport used to travel around the Island  
Day versus staying visitors  
Autumn 2007



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 just under £92 million. This is an increase of 10% versus the autumn 2006 (excluding inflation). This increase has arisen primarily from the small increase in longer holidays plus the increase in visits by overseas residents.

Staying trips are worth £81 million, £74 million of which is from domestic staying trips; day trips account for another £10.4 million.

<u>Staying trips</u>	
All domestic staying trips	£74 million
All overseas staying trips	£8 million
<u>All staying trips</u>	<u>£81 million*</u>
<u>Day trips</u>	
All domestic day trips	£10 million
All overseas day trips	£0.4 million
<u>All domestic day trips</u>	<u>£10.4 million*</u>

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

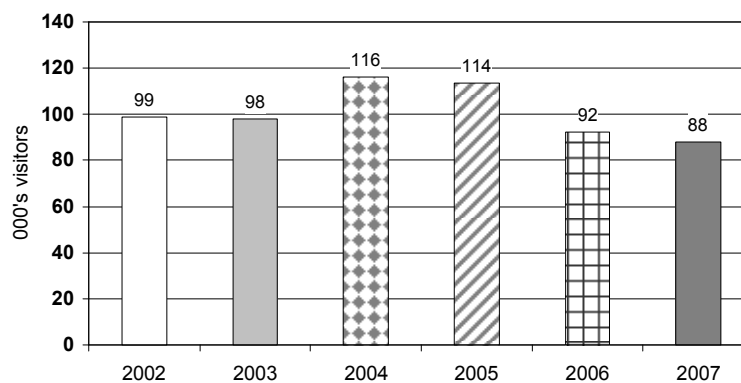
## Activity at Island Tourist Information Centres

There were 88,000 visitors to the Island TIC's during the autumn. This is a similar number to autumn 2006 (-4%), hence visitors to TIC's have remained reasonably steady alongside vast increases in the numbers visiting the website (see below).

It is worth noting that the estimated number of new/lapsed visitors (see page 9) is similar to last year and these are the tourists who are most likely to need to visit the TIC's.

Average spend per head was £8.82 which is a significant increase on 2006 (+26%).

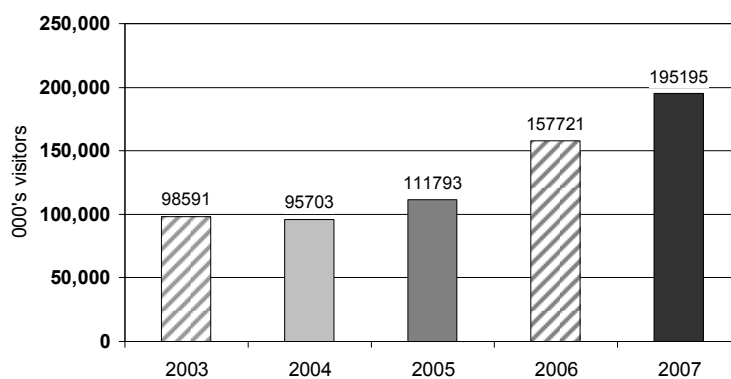
Number of visitors to TIC offices  
Q4 2007 vs. previous years



### **islandbreaks.co.uk website activity**

There were just under 200,000 visits to the website during the autumn, continuing the year on year increases; this is an increase of 24% versus last year and almost double the number seen in 2003.

Number of visitors to Isle of Wight Tourism website  
Q4 2007 vs. previous years



### **Occupancy statistics**

The Isle of Wight occupancy statistics for autumn 2007 will be issued in a separate bulletin due out in May.