

Isle of Wight Tourism
Activity Monitor

Tourism year
2006/2007

Caveat

All estimates contained in this report are based on research survey samples. Every effort has been made to produce accurate estimates but these are subject to statistical error. No warranty can be given as to the accuracy of information provided by interviewees.

All data is collected, processed and stored by an independent third party. All findings are based upon aggregated data and individual establishments' information remains confidential and is not disclosed. Original data will be destroyed.

This research is designed to provide estimates of visitors in a defined period. It is not within the scope of the current research to measure the number of visitors to a specific event which occurs within that defined period.

Some data included in this report is provisional data as this is written before final data has been released. Some historical data has been readjusted since previous reports were issued to improve accuracy of comparisons.

Terminology

Within this report the following definitions are used:

- passenger crossing: a one way trip either to or from the Isle of Wight
- visit or trip: a visit or trip is assumed to involve two crossings, one to the Island and one from the Island
- visitor: a visitor is assumed to make one visit or trip. Where one person makes two or more trips, they are counted as separate visitors
- domestic visit or visitor: a visit made by a UK resident.

Reporting periods

The reporting year, referred to as the Tourism Year, runs from early September through to the end of the peak season which enables businesses to receive a full year report in December to aid their planning for the following year's business.

The reporting periods for the tourism year 2006/2007 are:

- first quarter: post summer peak to end of calendar year: 3/9/2006 - 31/12/2006
- second quarter: January to two weeks before Easter: 1/1/2007 - 25/3/2007
- third quarter: two weeks before Easter to the summer peak: 26/3/2007 - 15/7/2007
- fourth quarter: the summer peak season : 16/7/2007 - 2/9/2007.

Contents

	Page
1 Introduction and overview	4
2 Summary of key points in 2006/2007	5
3 Weather on the Isle of Wight	6
4 Visits to the Isle of Wight by domestic residents	8
4.1 Domestic staying visitors	8
4.1.1 Estimated number of short break leisure visitors	8
4.1.2 Estimated number of longer holiday visitors	9
4.1.3 Estimated number of other staying visitors	10
4.1.4 Estimated total number of staying visitors	11
4.1.5 Average length of stay	12
4.1.6 Demand for bednights	13
4.1.7 Types of accommodation used	13
4.1.8 Profile of domestic staying visitors	17
4.1.9 Origin of domestic staying visitors	18
4.2 Domestic day visitors	19
4.2.1 Estimated number of day trips	19
4.2.2 Profile of domestic day visitors	21
4.2.3 Origin of domestic day visitors	22
5 Prevalence of business trips	23
6 Overseas visitors	23
7 Repeat versus first time visitors	25
8 Total number of visitors to the Isle of Wight	28
9 Mode of transport	29
10 Value of tourism	33
11 Visits to attractions	35
12 Isle of Wight Tourism activity levels	38
13 Accommodation occupancy levels on the Isle of Wight	39
13.1 Serviced accommodation	39
13.2 Self catering cottages, houses and flats	44
13.3 Static sites	45
13.4 Camping/touring sites	46
13.5 Peak season capacities	46

1. Introduction and overview

This report provides commentary on the Isle of Wight tourist industry for the period from 3rd September 2006 to 2nd September 2007. Comparisons are made with previous years, where possible. When making comparisons with recent years, events which have affected tourism include the World Cup football tournament in June/July 2006, the thwarted terrorist attack on UK airports in August 2006 which halted international during the peak holiday season; the Asian Tsunami in December 2004, the Madrid bombs in spring 2004, and the war in Iraq.

Consumer confidence (in the economy and employment¹) fell to a low point in December 2006 but then rose steadily and from May to September and remained at a similar level to the previous year. After a long period of no base rate rises, there were four rises during the year.

Firstly, looking at the international tourism market, the International Passenger Survey² data shows that overseas residents' trips to the UK increased slightly (+3%) to 33 million visits during the 12 months to August 2007.

Meanwhile visits abroad made by UK residents were relatively static this year at 70 million (12 months to August 2007). the majority of trips.

Domestic tourism across the UK was affected by poor weather this year. In particular, May to July was the wettest since records began in 1766: South Yorkshire, Gloucestershire and Oxfordshire suffered the worst weather and flooding and there was disruption to road, rail and air travel across the country. In June and July overnight trips, particularly business and trips to friends/ relatives, decreased versus 2006 however by August the volumes of trips in 2007 (January to August) had recovered to the level seen in 2006.³

Focussing on the Isle of Wight, numerous well established events, small and large, are scheduled throughout the year to attract visitors. The tourism year started with the Bestival in September, followed by Wight Air. Other main events included the Walking Festival in May, the Music Festival in June, Cowes Week in August, the Powerboat Festival in August and the Wight Air festival which, in 2007 was moved to late August (consequently this event featured twice in this tourism year). When making comparisons with 2004/05 it is worth noting that in that summer the Island benefited from the Trafalgar 200 celebration, a significant one off event, which was well attended and could not be replaced with another similar event.

During the tourism year of 2006/2007 it is estimated that there were just over a million holidays taken on the Isle of Wight (domestic and overseas residents short breaks and holidays combined). These included over 690,000 short leisure breaks (1 - 4 nights), which is a slight increase on last year (+2%). In addition there were just under 350,000 longer holidays (lasting 5+ nights), these were down slightly versus last year (-2%) although their duration increased making up for the decline in number. Together with other staying visits, the tourism revenue generated by staying trips is estimated to be just under £350 million.

Day trips increased (+2%) versus last year to reach 968,000 (domestic and overseas residents combined), which contributed £34 million to the local economy taking overall tourism revenue to £384 million.

1. Nationwide consumer confidence survey

2. The IPS is conducted by the Office for National Statistics. 250,000 interviews are carried out per year representing 0.2% of all travellers as they enter or leave the UK.

3. United Kingdom Tourism Survey conducted by Visit Britain.

2. Summary of key points in 2006/2007 tourism year

- There were 673,000 domestic short breaks (1 - 4 nights) to the Isle of Wight. This is at a similar level to last year (+1.5%) but up by 26% versus 2003/2004.
- 337,000 domestic holidays (5+ nights) were taken, this is a slight decline on last year (-3%) however the length of these holidays increased thereby compensating for the reduced total number.
- Visits to friends and relatives reached half a million visits, up 3% from last year due to an increase in the number of staying visits to friends and relatives (+8%); day VFR visitor numbers decreased slightly from last year.
- Staying business visits reached 93,000, which is level with last year.
- Total staying visits numbered just under 1.5 million, up slightly versus last year (+2%) but broadly in line with recent years.
- The demand for bednights in commercial accommodation is estimated at 5.2 million bednights, up from 5.0 million last year.
- Day visits (domestic) increased slightly to 920,000 (+3%) due to an increase in both business trips and leisure day trips.
- An estimated 446,000 new or lapsed visitors came to the Island. Almost three quarters of these were higher value staying visitors - 326,000; in addition there were 120,000 day visitors.
- For the third consecutive year, visits by overseas residents fell, this year the number was down by 7% to 122,000. This was due to a reduction in overseas day visitors.
- Total visits to the Isle of Wight reached 2.5 million, an increase of 2% versus last year.
- Visits to islandbreaks.co.uk increased dramatically for the third consecutive year (+26%). This increase is in line with the increase in on-line sales across Europe which is estimated to be up by 24% in 2007.*
- Alongside the increase in use of the website was a fall in the number of people visiting the Island tourist information offices. Just over 350,000 people visited, a decrease of 13% versus last year. Average spend was £8.62, down slightly on last year.
- 44% of leisure visitors went to an attraction, free or with an entrance fee: The majority (33%) went to an attraction charging an entrance fee; only 11% visited a free attraction. Visits to free attractions have declined significantly, down from 21% five years ago. Visitors on a main holiday were most likely to visit an attraction (90%) compared to only 30% of those on a staying visit to friends/relatives.

*Source: Trends in European Internet Distribution of Travel and Tourism Services

3. Weather on the Isle of Wight

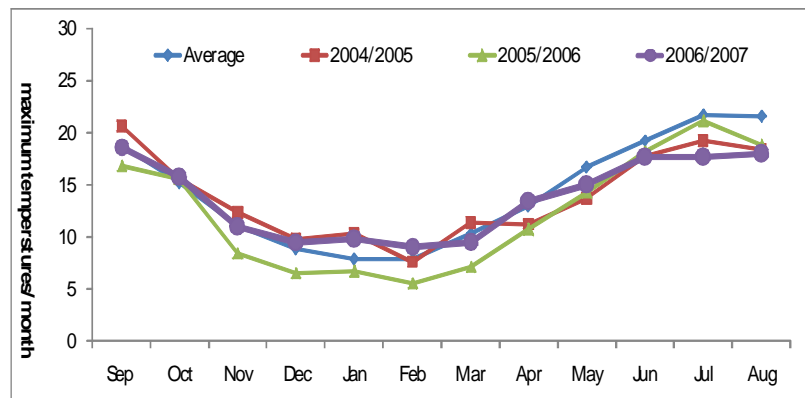
Continuous recording and reporting of weather is provided by Medina Valley Centre, Newport. Temperature, sunshine hours and rainfall can be compared with the long term average (1969 - 2000) to show whether the current weather is typical for the time of year.

The following charts show weather for the current year together with the last two years and the long term average.

3.1 Maximum temperatures

Maximum temperatures were in line with the long term average for the first 8 months of the year. These started to fall slightly below the average in May and the gap widened further in July and August, with the peak season temperatures falling 3.5 - 4 degrees below the norm. Temperatures were a little higher than last year with the exception of June to August.

Maximum temperatures on the Isle of Wight
Tourism year 2006/2007
vs. long term average and previous years

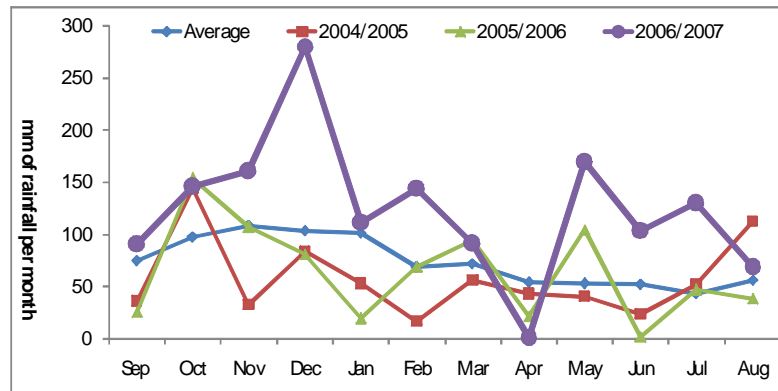


3.2 Rainfall

In line with the rest of the UK, this was a very wet year: rainfall reached 1,500 mm which is 68% above the average. Rainfall was very heavy in some periods, particularly December, May, June and early July. This wet weather was a contrast to last year.

April was dry and this was the only month when rainfall was below average.

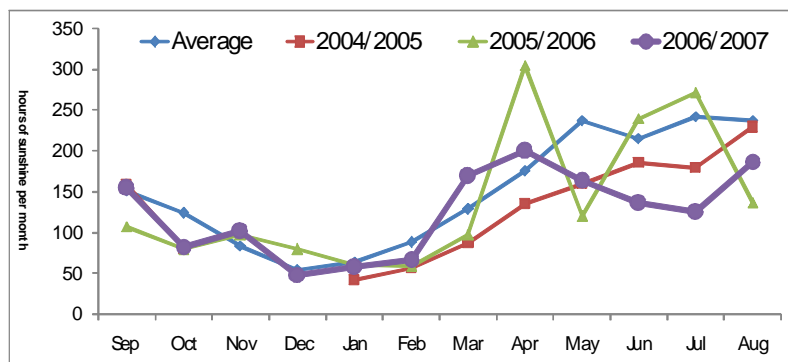
Rainfall on the Isle of Wight Tourism year 2006/2007 vs. long term average and previous year



3.3 Sunshine hours

During the first six months, hours of sunshine fluctuated around the average for the time of year. The dry weather in April, noted above, was matched by very sunny weather - there was 74% more sunshine than expected and more than double the sunshine hours experienced in April 2005. From May onwards there was below average sunshine, although August saw a slight improvement on June and July.

Sunshine on the Isle of Wight Tourism year 2006/2007 vs. long term average and previous years



No sunshine data available for Nov/Dec 2005 due to technical problems

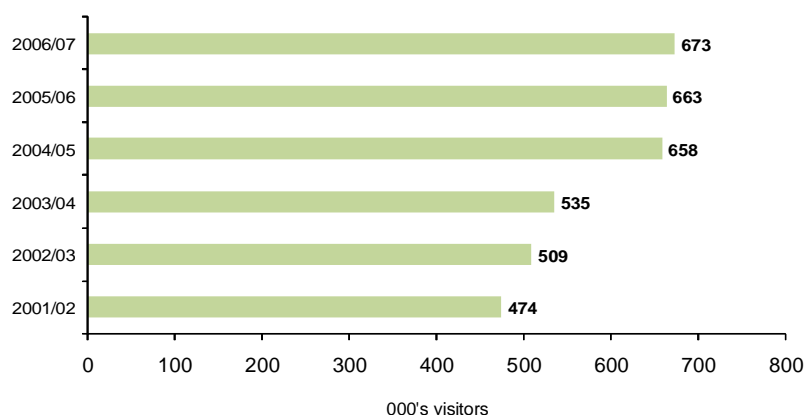
4. Visits to the Isle of Wight by domestic residents

4.1.1 Estimated number of short break leisure visitors (1-4 nights)

This is the largest single customer segment, accounting for over a quarter of all visits to the Island. The number of these trips has increased dramatically over the last 5 years since 2001/02, when there were an estimated 474,000 short breaks. This has now reached 673,000, growth in excess of 40%.

The rate of growth has slowed over recent years: this year was just 1.5% ahead of 2005/06 and 2% up on 2004/05.

**Estimated number of domestic
short break leisure visitors 1 - 4 nights
Tourism year 2006/2007 vs. previous years**



The definition of short stay holidays normally used within tourism is 1 - 3 nights duration, 1 - 4 nights is used on the Isle of Wight to reflect the Island location and the structure of the ferry tickets available. The table below shows the equivalent 1 - 3 night visits to allow comparison with other destinations. The trend over time has also been very strongly upwards: +45% versus 2001/02 and +8% versus last year.

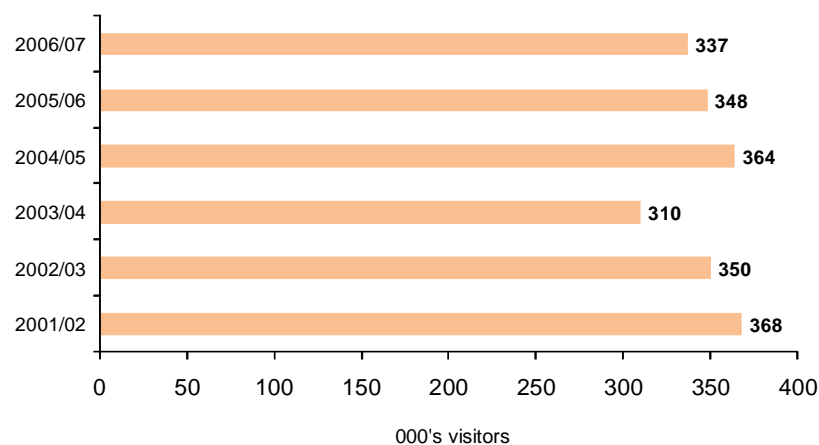
000's trips	2001/ 2002	2002/ 2003	2003/ 2004	2004/ 2005	2005/ 2006	2006/ 2007
1 - 3 nights	301	352	347	395	404	435

4.1.2 Estimated number of longer holiday visitors

Leisure visitors who stay for 5 or more nights are another important segment, due more to the length of time they spend on the Island, rather than the actual number of visitors.

In 2001/02 there were 368,000 but this declined over the next two years to a low point of 310,000 in 2003/04. In 2004/05 there was a significant increase but more recently volumes have declined very slightly. This year there were an estimated 337,000 longer holidays, which is slightly below last year (-3%), however the length of these holidays increased slightly making the demand for accommodation level with last year (see page 12).

**Estimated number of long stay
domestic leisure visitors: 5+ nights
Tourism year 2006/2007 vs previous years**



To correspond with the analysis of 1 - 3 night short breaks, long stay holidays taken can also be analysed as lasting 4+ nights. There have been some fluctuations in the number of these trips but the long term trend in 4+ nights holidays is upwards: +6.5% vs. 2001/02 and +13% vs. 2003/04. A high point was reached in 2004/05. This year 4+ night holidays were down by 5% vs. 2005/06, as illustrated below.

000's trips	2001/ 2002	2002/ 2003	2003/ 2004	2004/ 2005	2005/ 2006	2006/ 2007
4+ nights	541	512	509	623	606	576

4.1.3 Estimated number of other staying visitors

The chart below shows all categories of staying trips. This illustrates the relative importance of the short break and holiday sectors. In addition to over a million of these visitors, an additional 450,000 visitors came to the Island on other types of staying trips.

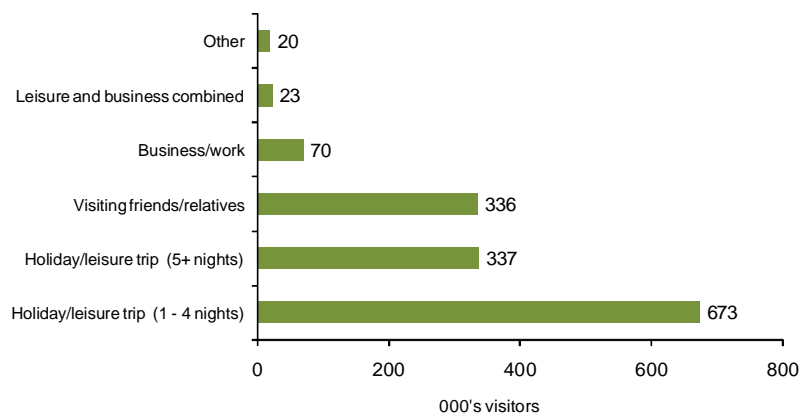
The dominant group of 'other staying visitors' was those visiting friends and/or relatives (VFR) with 336,000 of these visits. Whilst these equalled longer holiday visitors in number, their contribution to the Island's economy is far less due to:

- their low demand for commercial accommodation: 88% of staying VFR visitors stayed with their friends/relatives (page 15);
- a reduced propensity to visit attractions; only 30% of staying VFR visitors went to a paid attraction versus 90% of those on a main holiday (page 36).

Over 90,000 business trips or combined business/leisure trips were made; 70,000 were pure business trips but 23,000 trips were made where business was combined with a holiday or a visit to friends/relatives.

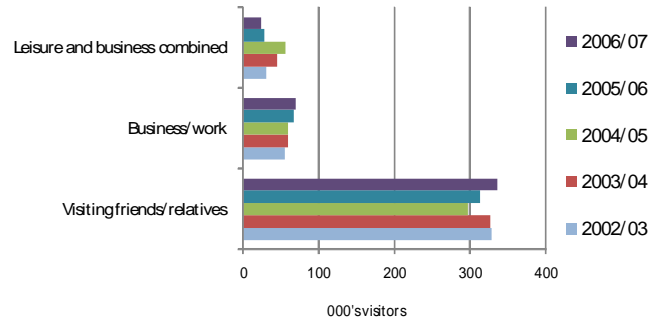
20,000 trips were made for a range of other reasons including house hunting, hospital visits, prison visits and other assorted reasons.

Purpose of staying trips amongst domestic visitors
Tourism year 2006/2007



The following chart shows how these three additional categories of trip have changed over time: VFR trips are up on the last two years (+8% vs. 2005/06) and are now slightly ahead of the previous high point. Business trips (both categories together) are at a very similar level to last year. These are up by 8% vs. 2002/03 but are below the high point seen 2004/05 (-19%).

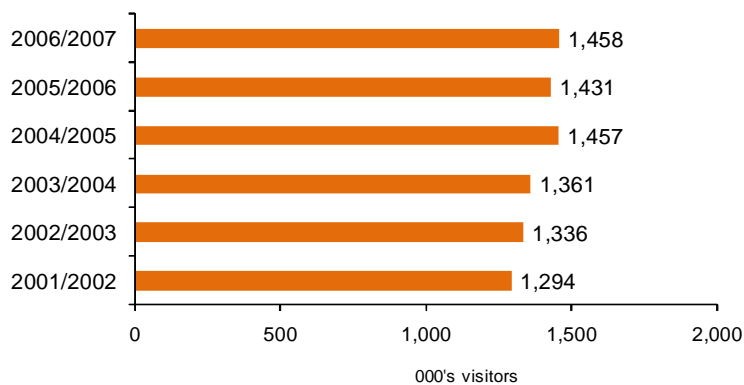
Purpose of staying trips amongst domestic visitors Tourism year 2006/2007 vs previous years



4.1.4 Estimated total number of staying visitors

The total number of domestic staying trips reached 1.46 million which is just ahead of last year (+2%) and level with the previous year. These trips account for the majority of tourism revenue on the Island (see page 33). However it should be noted that it is the type of staying visitor rather than the total number which is of greatest interest and importance.

Estimated number of domestic staying visitors Tourism year 2006/2007 vs. previous years



4.1.5 Average length of stay

The average length of stay was 4.3 nights; this is slightly longer than the last two years but down a little on earlier years.

One notable change has been the increase in the duration of longer (5+ night) holidays which averaged 8 nights, up from 7.6 nights in the last two years. Short breaks remained at a similar length to previous years.

Business trips lengthened and are now at their longest in the last few years.* VFR trips remained at the same length as last year.

Type of domestic trip	Average length (nights)					
	2001/2002	2002/2003	2003/2004	2004/2005	2005/2006	2006/2007
Short breaks: 1 - 4 nights	2.8	2.8	2.9	2.9	3.0	2.9
Longer holiday: 5+ nights	8.1	8.0	8.2	7.6	7.6	8.0
Visiting friends/relatives	3.3	3.3	3.5	3.1	3.3	3.3
Business*	3.9	3.2	3.2	3.8	3.9	4.9
<u>All domestic staying trips</u>	<u>4.6</u>	<u>4.5</u>	<u>4.4</u>	<u>4.2</u>	<u>4.2</u>	<u>4.3</u>

* Caution: small base size causes fluctuation in figures

4.1.6 Demand for bednights

The demand for bednights from domestic visitors is estimated at around 6.3 million nights, however not all of these would not require commercial accommodation (e.g. trips to visit friends and relatives). After allowing for this, the demand for bednights in commercial accommodation arising from domestic visitors was in the region of 5.2 million bednights.

An estimate of where this demand originates is shown in the following table.

This illustrates the importance of holidays and short breaks for the accommodation providers. 88% of the estimated demand for commercial bednights arises from those on short stays and longer holidays. Those on longer holidays (5+ nights) required an estimated 2.7 million bednights and short breaks (1 - 4 nights) required just under two million bednights.

Type of trip	Number of domestic bednights (millions)
5+ night holiday	2.7
Short stay (1 - 4 nights)	1.9
Visiting friends/relatives	1.1
Business or leisure & business combined	0.5
Other types of trips	0.1

Demand for commercial bednights (domestic) over time is shown below. This has fluctuated around 5 million over the period.

Millions of domestic bednights	2001/2002	2002/2003	2003/2004	2004/2005	2005/2006	2006/2007
Estimated bednights in commercial accommodation	5.0	4.9	5.0	5.2	5.0	5.2

4.1.7 Types of accommodation used

Staying visitors are asked about the type of accommodation they have used or will use. This enables us to look at the relative position of the serviced and self catering sectors.

The Occupancy Survey (issued in a separate report) covers use of serviced accommodation and certain self catering accommodation but this visitor data (taken from the visitor research conducted on the ferries) completes the picture by adding in those types of accommodation the Occupancy Survey cannot cover.

This year 48% of staying visitors used accommodation not covered by the occupancy survey, for example second homes, privately owned caravans, homes of friends and relatives and yachts. This helps to explain why, at times, there is a reported increase in demand for accommodation in the visitor research which has not been experienced by accommodation providers.

4.1.7.1 Visitors on holidays/short breaks

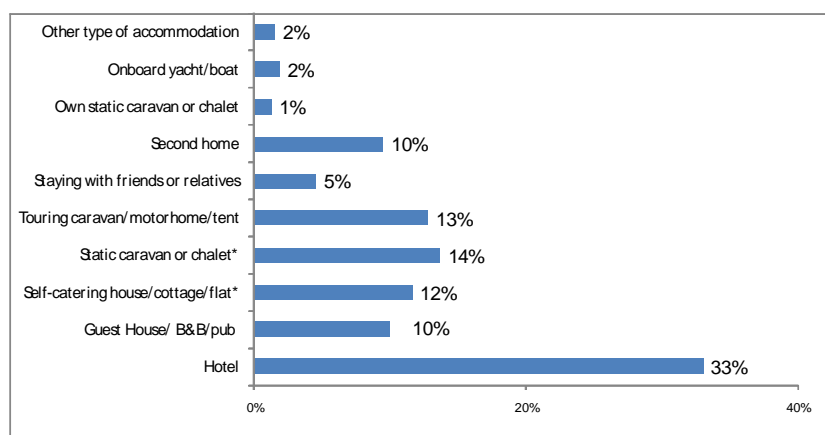
Serviced accommodation was used by just over two fifths of those on short breaks/longer holidays: they were most likely to stay in a hotel (33%) but another 10% stayed in a B&B/guesthouse.

Self catering options were used by over half of these visitors with a fairly even proportion selecting static caravans/chalets, touring sites (caravans and camping combined) and self catering houses/cottages/flats.

Second homes (owned or informally borrowed) were used by 10% of these visitors.

Visitor groups consisting of adults only were much more likely to use hotels whereas groups including children were more likely to opt for the self catering options.

**Type of accommodation used
by visitors on short breaks and holidays: 2006/2007**

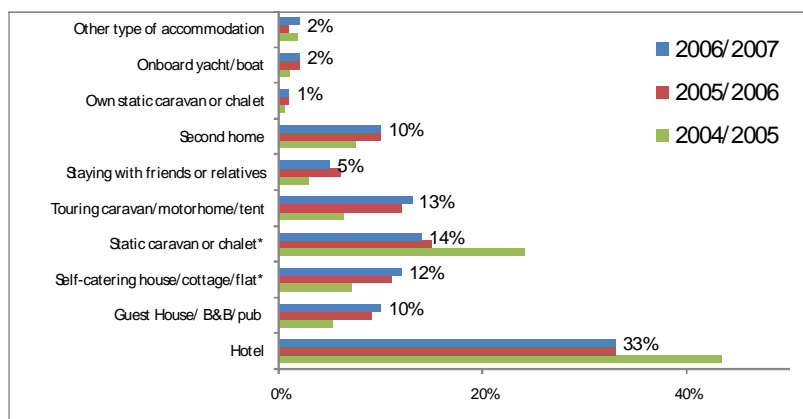


* Rented accommodation

Looking at changes versus previous years (shown overleaf):

- Use of hotels was level with last year but significantly lower than in 2004/05;
- Use of B&B's/ guesthouses increased versus the last two years;
- Use of rented cottages increased alongside a decrease in the use of static caravans/chalets;
- Use of touring sites has increased over this period.

Type of accommodation used by visitors on short breaks and holidays: 2006/07 vs. previous years



* Rented accommodation

4.1.7.2 Visitors on business/combined business & leisure trips

Almost 60% of the business only visitors and a third of those combining business and leisure used hotels or guesthouses. A significant minority (25%) of those combining business and leisure stayed with friends/relatives. In addition almost 10% of both groups used a rented house/flat.

4.1.7.3 Visitors to friends/relatives

In line with previous years, the majority (88%) of those visiting friends/relatives stayed with their host family.

4.1.7.4 Length of stay in different types of accommodation

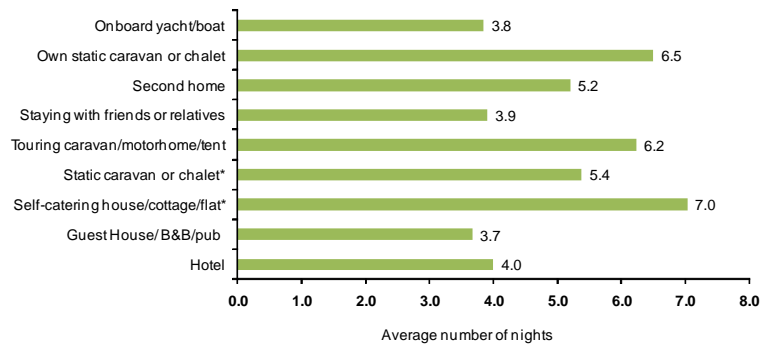
Combining the type of accommodation used with the length of stay provides information on the varying lengths of stay in different types of accommodation, shown in the following chart.

Long stay visitors tended to use the self catering options whilst short stay visitors were more likely to use hotels/guesthouses and B&B's.

Rented houses/flats/cottages attracted the longest staying visitors but these were followed by much lower cost accommodation: privately owned static caravans/chalets and touring caravans/tents.

The higher cost, serviced accommodation had a much shorter average length of stay.

Length of stay in different types of accommodation Staying visitors: 2006/2007



* Rented accommodation

4.1.8 Profile of domestic staying visitors

Whilst the Island is often considered to be a family holiday destination, the profile of visitors across the whole year reveals a strong bias towards adult visitors, as shown below.

Approximately one fifth of staying visitors were in groups with adults and children, a figure which has remained constant over time.

There are some variations according to visitor type, for example, those on holidays/short breaks have a higher proportion travelling with children (27%) and this is up a little versus the last three years.

	Adult only groups					Adult and children groups				
	2002/ 2003	2003/ 2004	2004/ 2005	2005/ 2006	2006/ 2007	2002/ 2003	2003/ 2004	2004/ 2005	2005/ 2006	2006/ 2007
All staying visitor groups	79%	80%	80%	79%	79%	21%	20%	20%	21%	21%
Holidays/short breaks	73%	75%	77%	74%	73%	27%	25%	23%	26%	27%
Visiting friends/relatives	83%	83%	82%	82%	83%	17%	17%	18%	18%	17%
Business or business/leisure combined	98%	97%	96%	96%	94%	2%	3%	4%	4%	6%

4.1.9 Origin of domestic staying visitors

The following chart shows the counties which produced at least 2% of staying visits.

Staying visitors travelled to the Island from a wide spread of areas. Density of population and distance from the ports are strong influences on likelihood to make a staying trip, hence Hampshire is the most important county - 16% of visitors originated there. This is closely followed by Greater London with 12%, then Surrey, Kent, Essex and West Sussex.

Smaller proportions do travel from across the UK.

The proportions originating in each county is relatively constant over time.

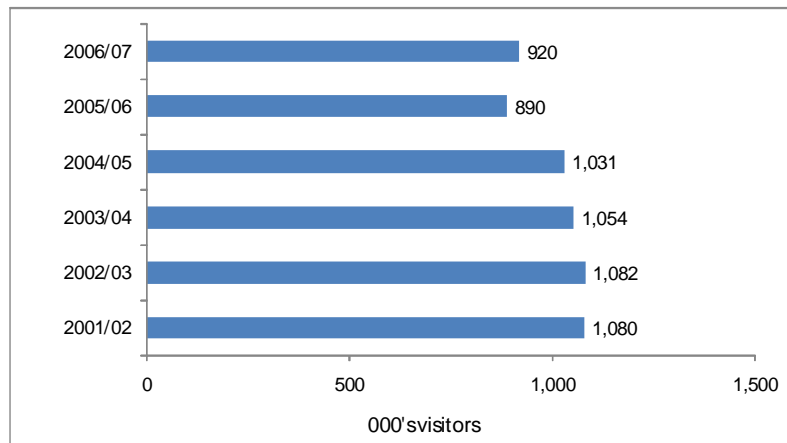
County	Est'd % of visits 2001/2002 000's	Est'd % of visits 2002/2003 000's	Est'd % of visits 2003/2004 000's	Est'd % of visits 2004/2005 000's	Est'd % of visits 2005/2006 000's	Est'd % of visits 2006/2007 000's
Hampshire	13%	15%	16%	15%	15%	16%
Greater London	14%	13%	12%	12%	13%	12%
Surrey	8%	8%	7%	8%	9%	9%
Kent	6%	5%	5%	6%	6%	6%
West Sussex	4%	4%	4%	4%	4%	5%
Essex	4%	5%	6%	5%	5%	4%
Berkshire	3%	3%	3%	3%	3%	3%
Dorset	3%	3%	3%	3%	3%	3%
East Sussex	3%	3%	2%	3%	3%	3%
Herts	3%	3%	2%	3%	3%	3%
Yorks (total)	4%	4%	3%	2%	2%	3%
Oxfordshire	3%	2%	2%	2%	3%	2%
Somerset (inc. Bristol)	3%	2%	3%	3%	3%	2%
West Mids.	3%	3%	2%	2%	3%	2%
Wales	2%	3%	2%	2%	2%	2%
Bucks	2%	2%	2%	2%	2%	2%
Wiltshire	2%	2%	2%	2%	2%	2%

4.2 Domestic day visitors

4.2.1 Estimated total number of day trips

An estimated 920,000 day visitors came to the Island last year; this is an increase of just over 3% on last year but remains below the volume seen in earlier years (-11% versus 2004/05).

Estimated annual number of domestic day visitors
Tourism year 2006/2007 vs. previous years

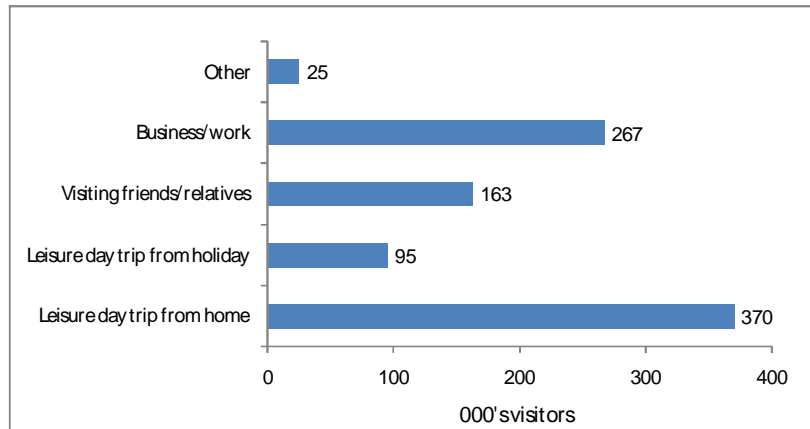


The following chart illustrates the purpose of these day trips.

Over the course of the year there were 465,000 leisure day trips to the Island, making this the most common reason to visit on a day trip and accounting for almost 20% of all visits to the Island. 80% of these leisure day visits were day trips starting from the visitors home with the remainder being trips made by people who were on holiday in the mainland areas surrounding the ports.

267,000 business trips were made to the Island and there were a further 163,000 day trips visits to friends/ relatives. In addition, a small number of other types of trips were made.

Purpose of day trips amongst domestic visitors Tourism year 2006/2007



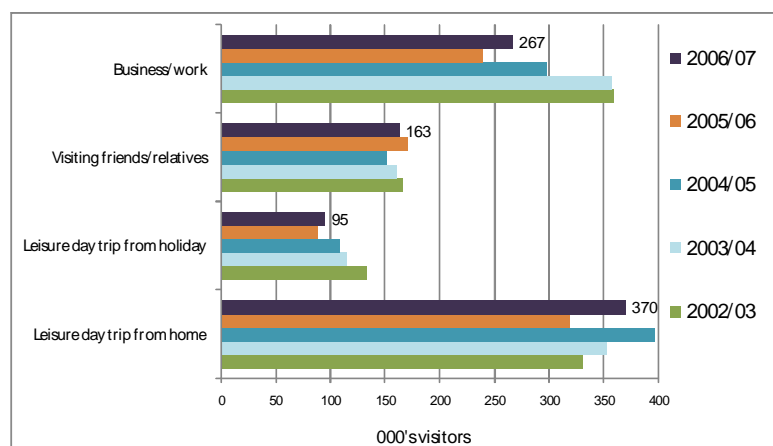
Changes over time in the mix of day trips are illustrated below.

The decline, seen last year, in leisure day visits which start from the visitors' home, was reversed and these increased by 16%; visits made by those who were on holiday on the mainland were at a similar level to the last two years but down over the long term.

Visits to friends and relatives have fluctuated a little over the last few years but remained fairly constant in number.

Over time there has been a considerable reduction in business day trips although these did increase by 12% on the low point seen last year.

Purpose of day trips amongst domestic visitors Tourism year 2006/2007 vs. previous years



4.2.2 Profile of domestic day visitors

In line with staying visitors, the profile of visitors is biased towards adult only groups: 84% of day visitor groups comprised just adults and adult only groups dominated all day visitor types.

The proportion visiting accompanied by children increased amongst leisure day visitors, with around 3 in 10 of these visitors being in groups with children.

	Adult only groups					Adult and children groups				
	2002/ 2003	2003/ 2004	2004/ 2005	2005/ 2006	2006/ 2007	2002/ 2003	2003/ 2004	2004/ 2005	2005/ 2006	2006/ 2007
All day visitor groups	87%	86%	83%	84%	84%	13%	14%	17%	16%	16%
Leisure day visitor (from home)	78%	76%	68%	72%	71%	22%	24%	32%	28%	29%
Leisure day visitor (whilst on holiday)	75%	70%	69%	69%	69%	25%	30%	31%	31%	31%
Visiting friends/relatives	82%	80%	80%	81%	82%	18%	20%	20%	19%	18%
Business or business/leisure combined	99%	98%	98%	99%	99%	1%	2%	2%	1%	1%

4.2.3 Origin of domestic day visitors

The most important counties in terms of origin of day visitors to the Isle of Wight are shown on the table below. Counties where 2% or more of day trips originate are detailed. 2006/2007 is shown together with previous years. Percentage of day visits originating from each county is given to allow comparisons over time.

In line with staying trips, Hampshire continues to be the most important county for day trips to the Island, far exceeding all others and demonstrating the strong influence of drive time to the ports in the day trip market. The proportion of visitors coming from Hampshire has remained constant over recent years.

London follows Hampshire but at 7% of day trips was a long way behind. The following four counties, in terms of volume, all border Hampshire, underlining the importance of proximity.

County	Est'd % of visits 2001/2002	Est'd % of visits 2002/2003	Est'd % of visits 2003/2004	Est'd % of visits 2004/2005	Est'd % of visits 2005/2006	Est'd % of visits 2006/2007
Hampshire	51%	51%	51%	52%	50%	51%
Greater London	8%	6%	6%	5%	5%	7%
Dorset	5%	6%	6%	6%	6%	6%
Surrey	5%	6%	6%	7%	7%	6%
West Sussex	6%	5%	7%	6%	7%	6%
Wiltshire	3%	2%	3%	2%	2%	3%
Kent	1%	3%	2%	3%	2%	2%
Berkshire	3%	3%	3%	3%	2%	2%
East Sussex	2%	2%	2%	2%	2%	2%

5. Prevalence of business trips

There were just under 390,000 business trips this year, an increase of 11% versus last year. The vast majority of these trips were made by domestic visitors (93%).

Over the long term, the number of business trips has declined; there are now 22% fewer than 5 years ago.

000's trips	2001/ 2002	2002/ 2003	2003/ 2004	2004/ 2005	2005/ 2006	2006/ 2007
All trips	496	457	473	447	348	387
Domestic trips	464	444	459	414	332	360
Overseas trips*	32	13	14	33	16	27

*N.B. Base for overseas estimates is very small causing estimates to fluctuate.

Business trips were dominated by domestic day trips: these made up two thirds (69%) of the total.

6. Overseas visitors

An estimated 122,000 overseas residents visited the Island last year, and 60% of these were on a staying visit. The table below provides an estimate of their main reasons for visiting.

	Trips 000's*
Leisure day trip	43
Holiday	30
• 1 - 4 nights	19
• 5+ nights	11
VFR:	24
• Staying	22
• Day trip	2
Business:	26
• Staying	24
• Day trip	2

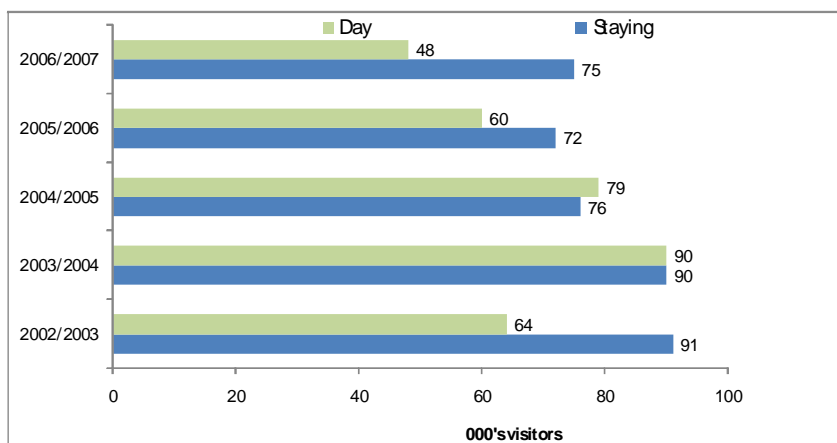
*N.B. Small sample sizes of overseas visitors.

The estimated volume of overseas visitors has fluctuated over the course of this survey, this is due in part to the small numbers of overseas visitors in the survey.

The long term trend is downwards and in 2006/07 the number of overseas visitors fell further to 122,000, the lowest number recorded in recent years. This is due to a decline in day visitors from overseas (see chart overleaf).

	2001/ 2002	2002/ 2003	2003/ 2004	2004/ 2005	2005/ 2006	2006/ 2007
Visitors 000's*	162	155	178	156	131	122

**Estimated number of overseas
staying and day visitors
Tourism year 2006/2007 vs. previous years**



·N.B. Small sample sizes of overseas visitors.

It is estimated that these overseas staying visitors would need approximately 660,000 bednights, of which, an estimated 450,000 would have been taken in commercial accommodation.

The country of origin is shown on the following chart. These estimates are based on small samples and so are subject to fluctuations and error, however they provide an indication of the key countries. The main countries, in terms of volume, are shown but there is a long list of other countries generating much smaller numbers.

Over the long term, the key countries of origin have remained unchanged. These are dominated by USA/Canada, Australia/New Zealand and nearby European countries. Poland is emerging as a new source of visitors to the Island.

Origin of overseas visitors					
Country	Est'd % of visits 2002/2003	Est'd % of visits 2003/2004	Est'd % of visits 2004/2005	Est'd % of visits 2005/2006	Est'd % of visits 2005/2006
Germany	9%	10%	8%	10%	13%
USA	19%	14%	16%	13%	10%
Australia	8%	8%	9%	8%	10%
France	13%	10%	12%	8%	9%
Canada	6%	6%	4%	7%	5%
Netherlands	6%	5%	4%	6%	5%
Belgium	*	1%	1%	2%	5%
Eire	5%	5%	4%	5%	5%
Poland	*	1%	1%	2%	4%
Spain	5%	4%	5%	5%	3%
South Africa	3%	3%	4%	3%	3%
New Zealand	3%	3%	3%	5%	2%

(N.B. Sample sizes for individual country estimates are very small so these figures should be treated with caution.)

* less than 1%

7. Repeat versus first time visitors

Day and staying leisure visitors are asked when they last visited the Isle of Wight, if at all. 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.

The focus in this section is on visitors taking leisure day trips, short breaks and longer holidays since those who are visiting friends and relatives tend to be regular visitors, influenced primarily by invites from relatives rather than Isle of Wight Tourism marketing. Only 4% of VFR visitors were on their first visit to the Island and over 80% were on their second or subsequent visit in the last 12 months.

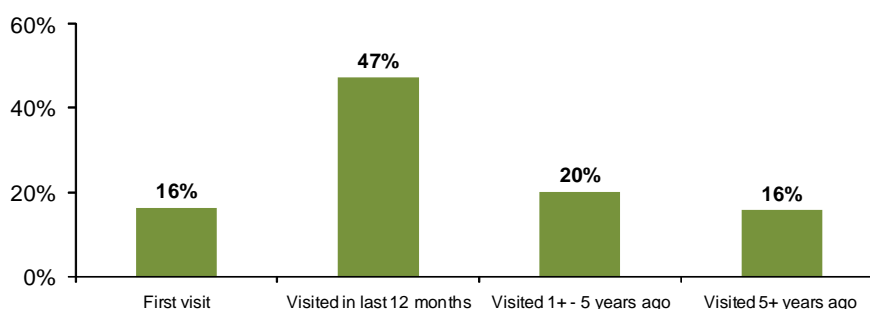
7.1 Short break and holiday visitors

Repeat versus new visitors on short breaks and holidays are illustrated below.

A third of those on a short break or holiday were new or lapsed visitors (5+ years), divided evenly between first and lapsed visits. This pool of visitors is important as it ensures that the Island has renewed a part of its visitor base during the last year.

The remaining two thirds (67%) were more regular visitors - some much more regular: almost half were on their second (or more subsequent) visit in the last 12 months and a fifth had visited the Island within the last 5 years but not in the last 12 months. This success in attracting holidaymakers and leisure visitors to return suggests that the Island's holiday visitors have a high level of satisfaction and that the Island is competing well with alternative destinations.

Repeat visitors to the Isle of Wight
Holidays/short breaks visitors: 2006/2007



On this basis, it is estimated that there were 326,000 new or lapsed visitors who came to the Island on a holiday or short break.

Estimated number of visitors	Short break/main holiday 000's
New visitors	166

Lapsed visitors (5+ years)	160
----------------------------	-----

The pattern of new/repeat visiting has remained fairly constant over the last three years.

Repeat visitors to the Isle of Wight
Holidays/short breaks visitors: 2006/2007 vs. previous years



Looking at the accommodation choices of new and lapsed visitors shows that these visitors were more likely to use hotels or B&B's/guesthouses than the most regular visitors. Over a fifth of the most regular visitors (repeat visitors in the last 12 months) stayed in a second home or private caravan/chalet.

7.2 Leisure day visitors

The majority of day visitors travelled *from their own home* (page 20) and many of these were regular visitors:

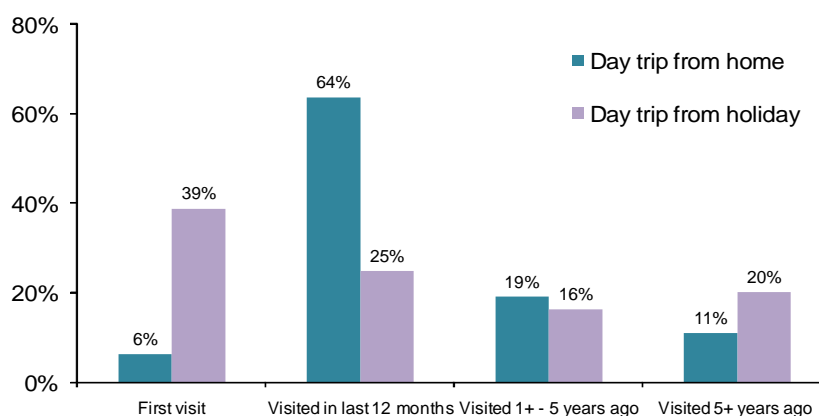
- 64% were on their second (or subsequent) visit in the last 12 months;
- 19% had visited in the last 5 years.

The Island is clearly successful at attracting repeat leisure day trippers.

There was a small proportion of new visitors (6%) and lapsed visitors (11%) which does mean that the leisure day visitor base is being refreshed annually.

Leisure day trip visitors to the Isle of Wight *whilst holidaying nearby on the mainland* were much more likely to be new visitors and these visitors represent a source of potential short break or main holiday visitors for the future. These included many overseas residents. A much higher proportion of these visitors were on their first trip (39%) or the first for several years (20%), only a quarter were regular visitors.

Repeat visitors to the Isle of Wight
Leisure day visitors: 2006/2007



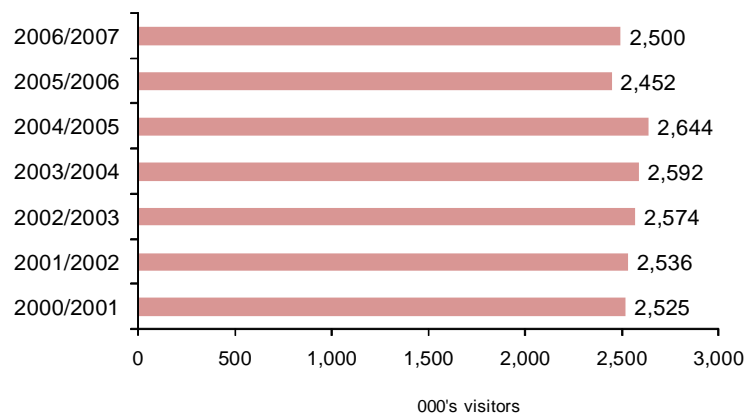
This translates to almost 120,000 new/lapsed visitors.

Estimated number of new and lapsed visitors 000's	Day trip from home	Day trip whilst on holiday
	63	56

8. Total number of visitors to the Isle of Wight

Taking all the visitors into account, the total number coming to the Isle of Wight in this 12 month period is estimated at 2.5 million. This is an increase of 2% versus last year but down by 5% on the high point recorded in 2004/05. However it is the mix of different types of visitors which is of more importance than the total number.

Estimated annual number of total visitors
Tourism year 2006/2007 vs. previous years



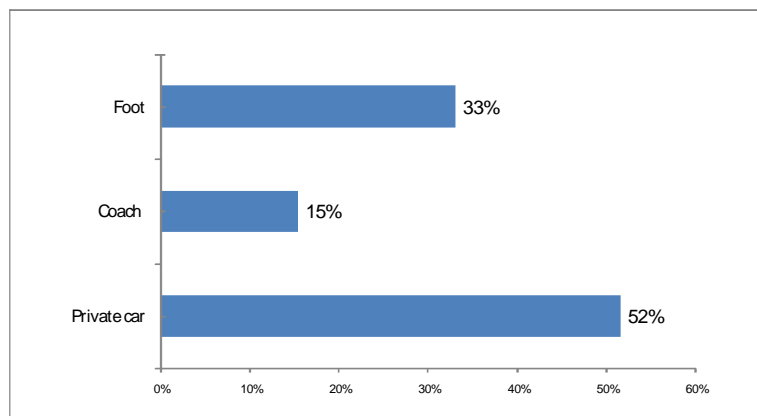
9 Mode of transport

Mid 2005 additional questions were added to the visitor survey to look at mode of travel to the mainland ports, on board the ferries and around the Island. This data can be used to look at demand for public transport services and road usage.

9.1 Mode of travel on board the ferry

Over half the visitors to the Island chose to take their car with them to the Island (52%). A third travelled as foot passengers whereas only 15% travelled by coach.

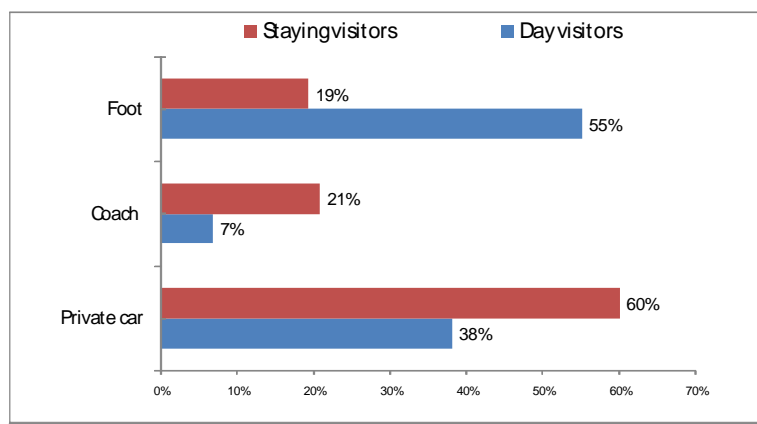
Mode of travel on board the ferry
2006/2007



Within these figures are the quite different travel habits of staying and day visitors:

- Staying visitors were much more likely to travel with their car (60%) than as foot passengers (19%). Only a fifth of staying visitors travelled by coach.
- Day visitors were far less dependent on transport - only 38% took their car and 7% travelled by coach. Day visitors were most likely to be pedestrians (55%) meaning they were more likely to use public transport.

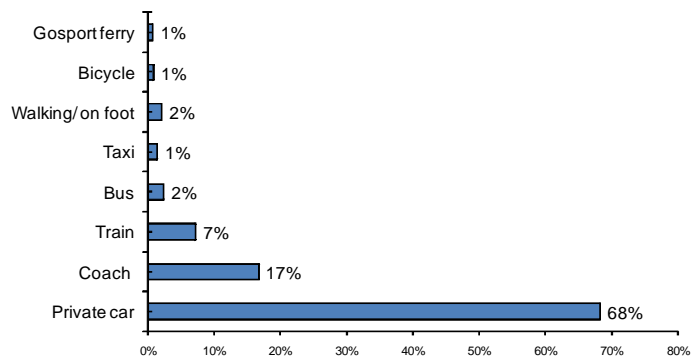
Mode of travel on board the ferry
2006/2007



9.2 Mode of travel to the mainland terminal

Two thirds travelled by car to the mainland terminal and another 17% by coach. Only 7% travelled by train and 2% by bus.

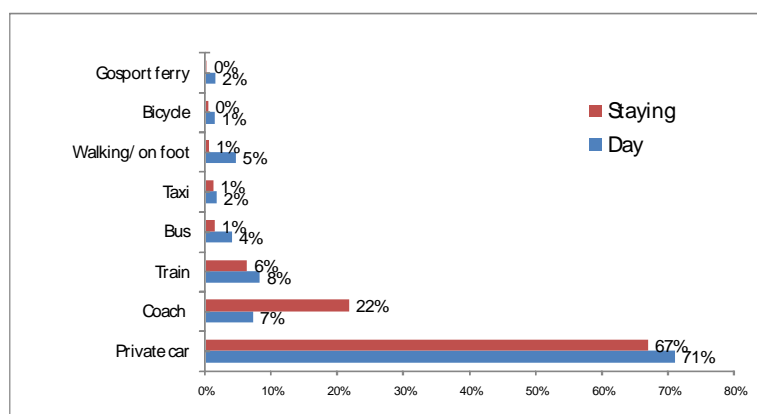
**Transport used to travel to the mainland terminal
2006/2007**



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.

Day and staying visitors were fairly similar in their mode of arrival at the port. The main difference is the use of coaches: 22% of staying visitors arrived by coach versus 7% of day visitors. Use of the car was similar in both groups but, whereas most staying visitors took their car on board, only about half the day visitors did so creating a need for day parking nearby the mainland terminals.

**Transport used to travel to the mainland terminal
2006/2007**

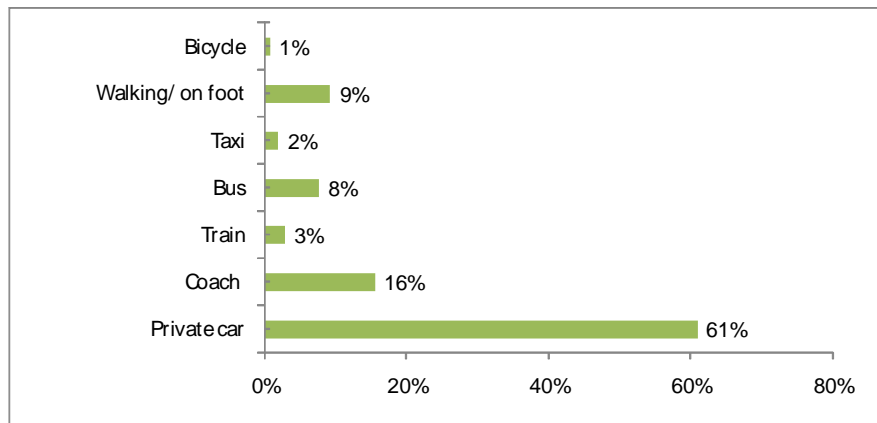


9.3 Mode of travel around the Isle of Wight

Once on the Island, the private car continued to dominate travel: over 60% used this as their main mode of travel. 8% used the Island bus service, four times the percentage who used the bus to travel to the mainland terminals. Far fewer made use of the Island Line train (3%).

Walking was popular once on the Island - cited by 9% but only 1% travelled around by bike.

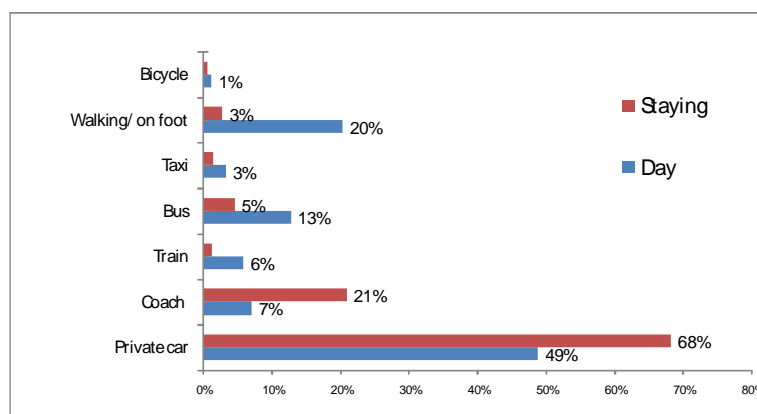
Transport used to travel around the Island
2006/2007



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.

There were significant differences between day and staying visitors: staying visitors had a greater carbon footprint, they made little use of public transport and two thirds travelled around by car, a fifth by coach. Conversely day visitors were more likely to be walking (20%) and made much more use of public transport and than staying visitors. N.B. Use of friends'/relatives' car boosts the proportion of day visitors using a private car above the level who took their car on the ferry.

Transport used to travel around the Island
2006/2007



10. Value of tourism

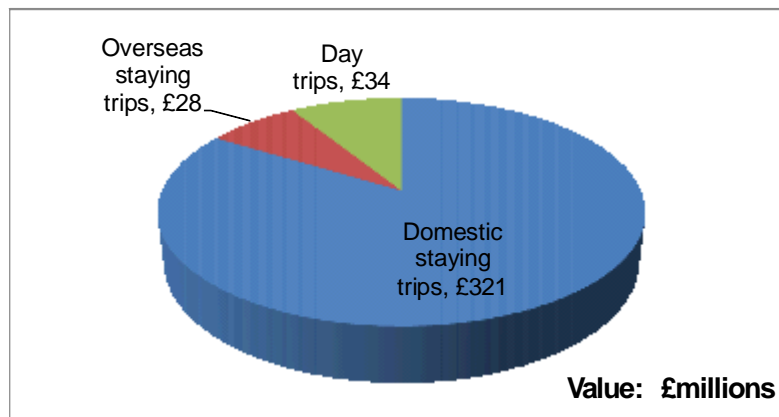
Tourism on the Isle of Wight is now estimated to be worth £384 million for the tourism year 2006/2007.

Each year, domestic staying trips account for the majority of the Island's tourism revenue. This year these contributed an estimated £321 million, 84% of the total. Of these staying domestic trips, the vast majority is derived from short breaks and holidays.

Spending by staying visitors from overseas contributed an estimated £28 million to the economy taking revenue from staying trips to £350 million.

Day trips generated an additional estimated £34 million in tourism revenue, again derived primarily from domestic residents.

Estimated value of tourism in 2006/07
£384 million



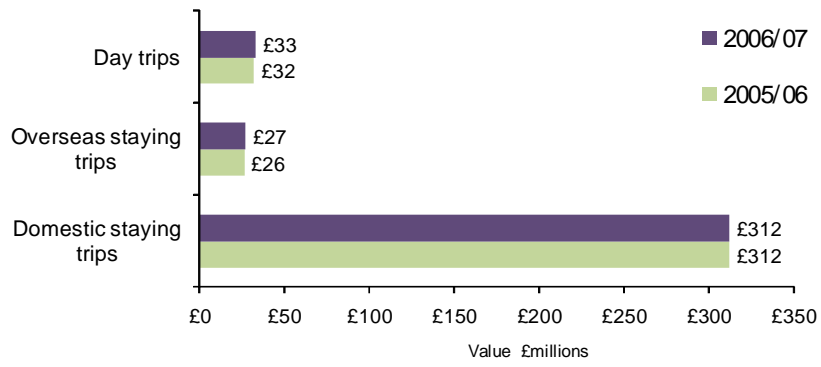
The estimated spend was level with the previous year (excluding the effect of inflation) - illustrated overleaf.

Caveat

Value estimations are calculated using estimates of numbers of trips together with estimates of expenditure. No new survey data was commissioned for this work hence all data is the best available data taken from existing surveys. Values should therefore be treated as approximate estimations. No responsibility can be taken for any error in these figures. No multipliers are included in the value.

Estimated value of tourism

Tourism year 2006/2007 vs. last year



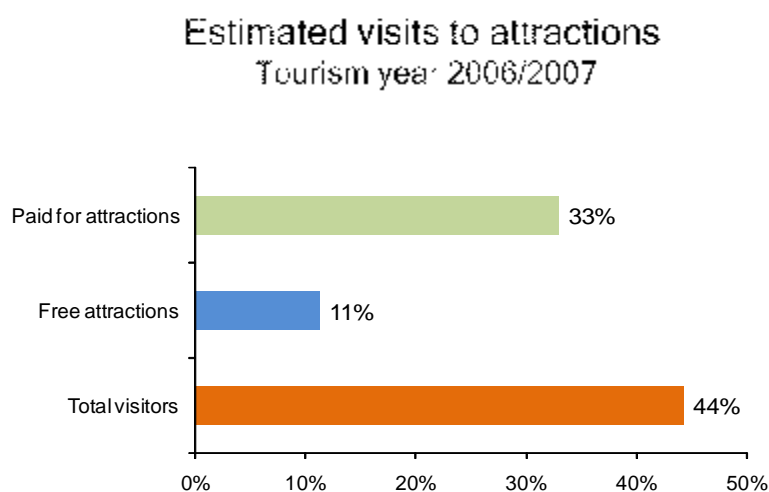
Values given at 2005/06 prices

11. Visits to attractions

Leisure visitors returning from the Isle of Wight are asked whether they visited a free attraction or an attraction charging an entrance fee during their visit.

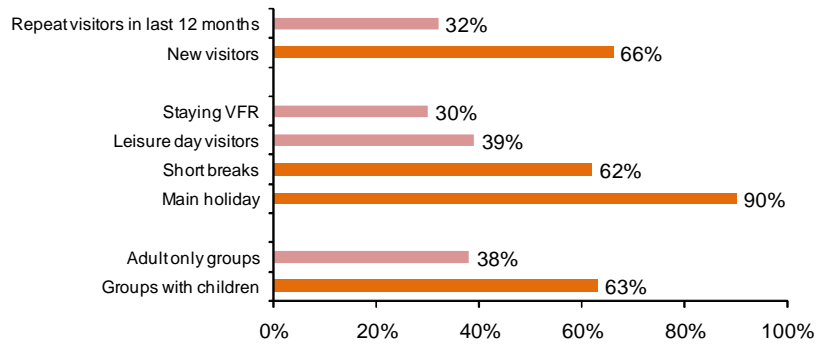
It should be noted that this methodology may under represent visits to attractions because it relies upon recall of visits on the return journey home. Some free attractions may not be regarded as an attraction by the visitor and so will not be recorded. (N.B. Historically, attempts were made to collect more accurate data from the attractions but insufficient attractions participated in this survey.)

44% of all leisure visitors visited an Island attraction (free and/or with admission fee combined). The majority said they went to an attraction charging an entrance fee.



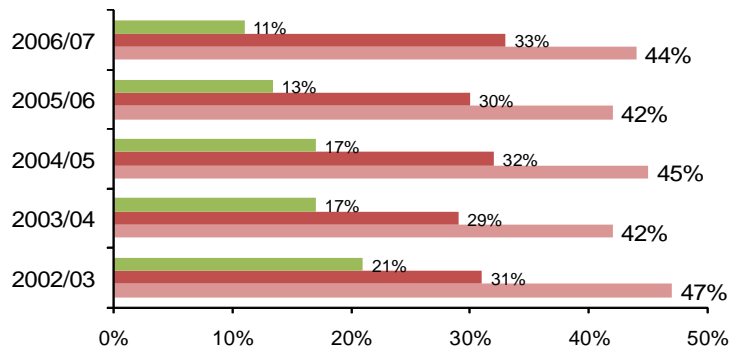
Propensity to visit attractions varies enormously amongst different types of visitors, ranging from a low of 30% amongst staying visitors to friends/relatives to a high of 90% of those on their main holiday. Attractions charging an entrance fee were consistently more likely to be visited than free attractions. This is illustrated in the following chart.

Estimated visits to attractions
Tourism year 2006/2007
Customers' propensity to visit



The trend in visits to attractions is shown below. After a slight decline last year, visits to attractions returned to a similar level to 2004/05, however this increase was due to more people visiting attractions with an entrance fee, visits to free attractions have declined each year since 2002/03.

Estimated visits to attractions
Tourism year 2006/2007 vs. previous years
Paid for and free attractions



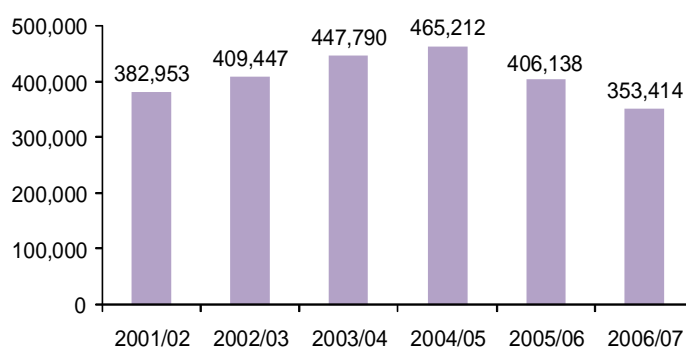
12. Isle of Wight Tourism activity levels

12.1 Tourist Information Centres

More than 350,000 visitors went to the Island's Tourist Information Centres this year. This is the second year the number of visitors has decreased since visitor numbers reached a high point in 2004/05: -13% vs. 2005/06; -24% vs. 2004/05.

Average spend at the TIC's was £8.62, this is down slightly on last year (-28pence) but up considerably from £7.45 the previous year.

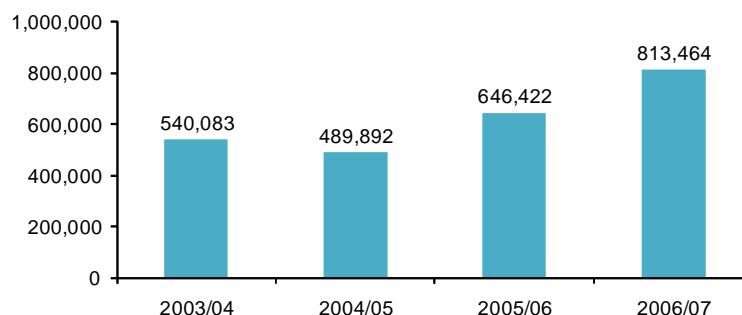
Annual number of visitors to the
Isle of Wight TIC offices
Tourism year 2006/2007 vs. previous years



12.2 Website activity: islandbreaks.co.uk

The Isle of Wight's website continues to perform extremely well, more than compensating for any fall in visitor numbers to TIC's. There were over 800,000 visits to islandbreaks.co.uk during the year. This is a significant increase on last year (+26%) which was itself a huge increase - on the previous year. Visits to the site are now more than 50% ahead of 2003/04.

Annual number of visits to islandbreaks.co.uk
Tourism year 2006/2007 vs. previous years



13. Accommodation occupancy levels on the Isle of Wight

This section covers occupancy levels in serviced and rented self catering accommodation plus pitch occupancy on touring sites. It is estimated that, over the course of the year, these categories of accommodation account for approximately half (52%) the accommodation used on the Island.

The sample of accommodation providers has reduced this year versus previous years; this is due to reduced numbers willing to take part - a problem which also has been experienced nationally. Ways to improve response rates for next year are under consideration at present but this has affected the reliability of the year on year comparisons in this report.

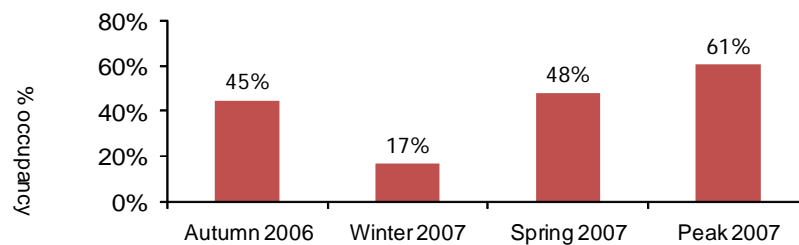
13.1 Serviced accommodation: Hotels, Guesthouses and Bed & Breakfast occupancy

Results in this section are based on a sample of between 37 and 59 establishments. At the start of the year the sample was at the higher level but by the peak season this has reduced to the lower level.

13.1.1 Bedspace occupancy

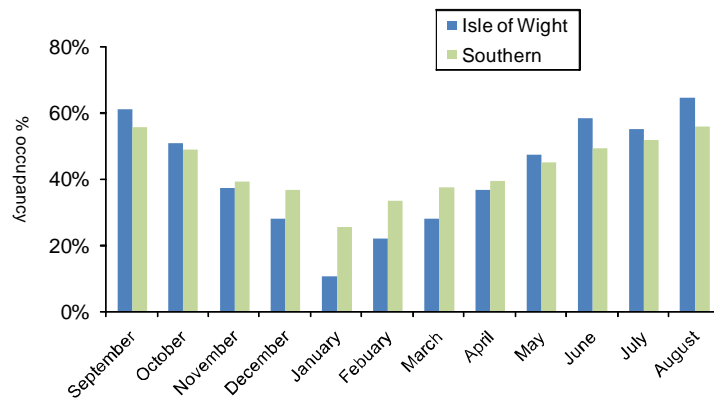
Bedspace occupancy in all types of serviced accommodation across the Island ranged from a low of 17% in the winter period rising up to 61% in the peak season.

Isle of Wight hotels/guesthouses/B&B's
Bedspace occupancy 2006/2007



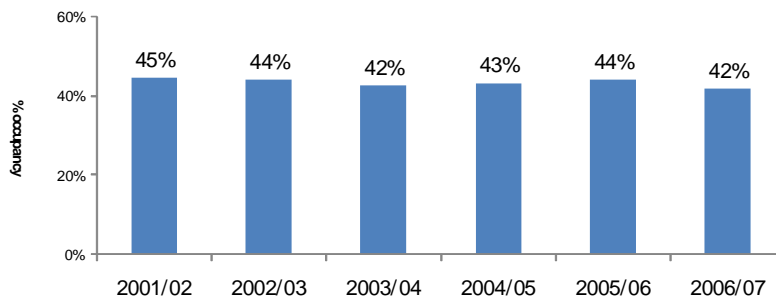
To put this into context, bed occupancy on the Isle of Wight can be compared to the whole Southern (TSE) region. Bedspace performance on the Isle of Wight exceeded the region in September and October plus May through until August. The difference versus the region was greatest in June and August (+9%), months when there is a higher proportion of families visiting the Island.

Isle of Wight hotels/guesthouses/B&B's
 Bedspace occupancy 2006/2007
 Isle of Wight vs Southern region



The average bedspace occupancy across the whole year was 42%, which is slightly below last year but at a similar level to the previous two previous years, as shown below.

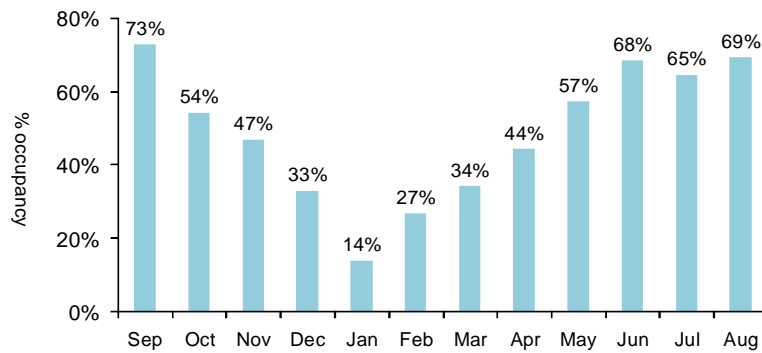
Isle of Wight hotels/guesthouses/B&B's
 Bed space occupancy 2006/2007 vs previous years



13.1.2 Room occupancy

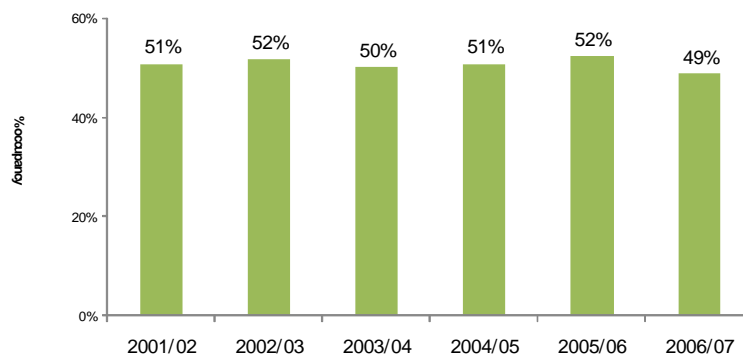
Room occupancy reached 73% in September, reducing to 14% in January. This then climbed steadily through the year to a high of 69% in the key month of August. Room occupancy dipped in July, which is unusual; this fall coincided with particularly wet weather in early July.

Isle of Wight hotels/guesthouses/B&B's
Room occupancy in 2006/2007



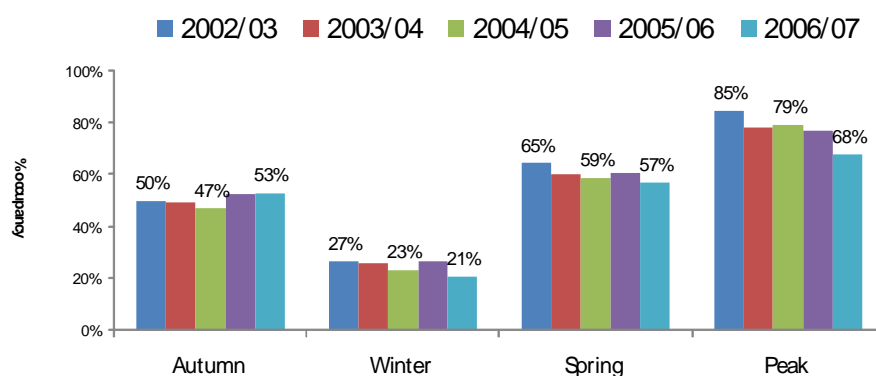
These monthly averages resulted in an annual average room occupancy of 49%, which is slightly below recent years.

Isle of Wight hotels/guesthouses/B&B's
Room occupancy 2005/2006 vs previous years



Looking at the seasonal trend over time, autumn room occupancy was broadly in line with previous years but in winter and spring occupancy fell slightly below recent years. In the peak a fall of 9 points has taken occupancy to its lowest level over recent years.

Isle of Wight hotels/guesthouses/B&B's Room occupancy 2006/07 vs previous years



The larger establishments (26+ rooms) achieved higher occupancy levels than other hotels/guesthouses and B&B's in autumn, spring and the peak season but were below smaller hotels in the winter. In each season, the lowest level of room occupancy was experienced by the 4 - 10 room establishments. B&B's performed well in the peak season with occupancy above guesthouses and small hotels (4 - 10 and 11 - 25 rooms).

Room occupancy	1 - 3 rooms	4 - 10 rooms	11 - 25 rooms	26+ rooms
Autumn 06	38%	34%	45%	66%
Winter 07	21%	14%	25%	21%
Spring 07	52%	48%	52%	65%
Peak 07	66%	63%	64%	72%

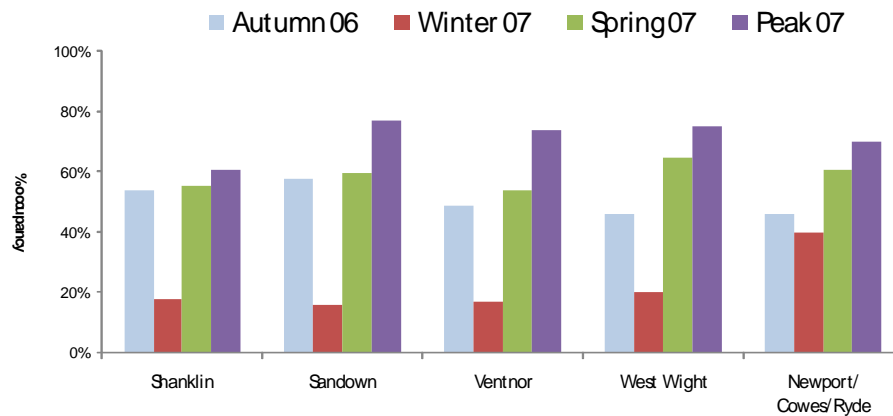
There was some variation in room occupancy between the different areas on the Island: Newport/Cowes/Ryde achieved the highest annual average occupancy, closely followed by Sandown.

Annual room occupancy	Shanklin	Sandown	Ventnor	West Wight	Newport/Cowes/Ryde
	47%	52%	46%	47%	53%

The following chart shows the variation by quarter across the Island:

- Sandown had the highest occupancy in the autumn, closely followed by Shanklin.
- Newport/Cowes/Ryde outperformed other areas during the winter with double the occupancy of the other areas.
- During the peak Shanklin had much lower occupancy than the rest of the Island.

Isle of Wight hotels/guesthouses/B&B's
Room occupancy 2006/2007



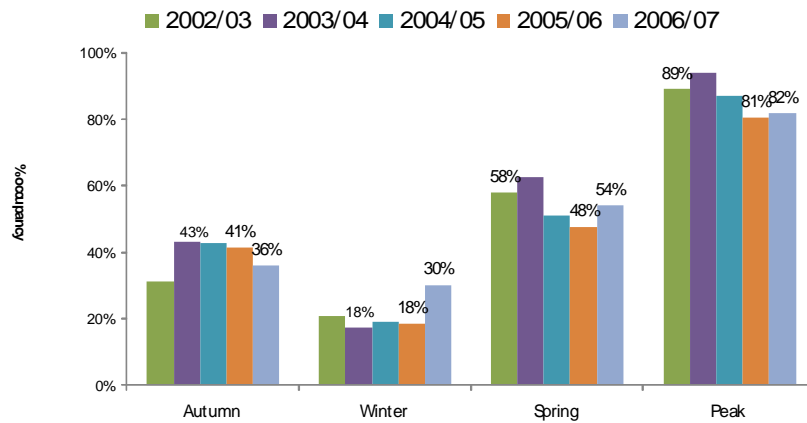
13.2 Self catering cottages, houses and flats

This section covers occupancy in rented cottages, houses and flats but does not include use of second homes which may be rented out for some of the year. Between 39 and 77 operators took part in the survey, depending upon the time of year.

Occupancy in self catering units (many of which are smaller operators with one or two units) ranged from 36% in winter up to 82% in the peak season.

Looking at performance over time, occupancy in this sector was down slightly in the autumn versus the last 3 years. In winter it was ahead of the last 4 years; occupancy was also up in spring versus the last two years. In the peak season occupancy was level with last year but down slightly versus earlier years.

Isle of Wight self catering accommodation
Occupancy in houses, cottages and flats
2006/2007 vs. previous years



13.3 Static sites

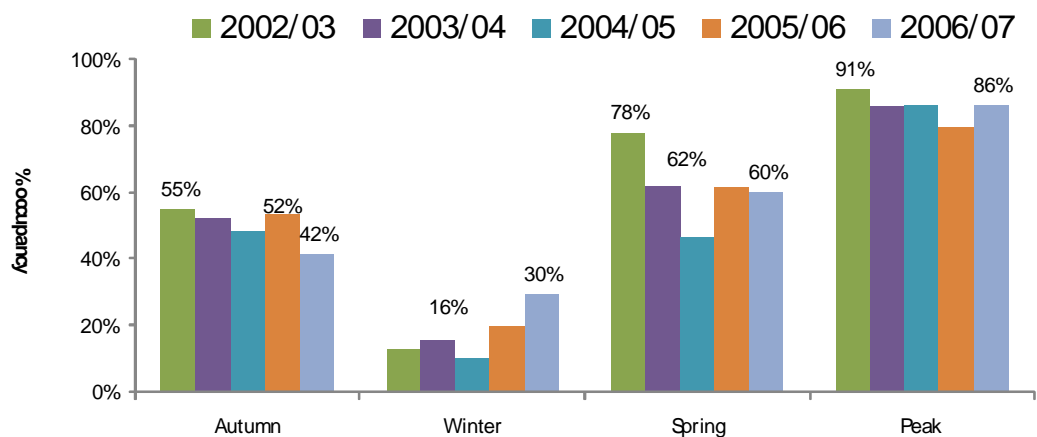
Statistics for this are based upon a small sample; this ranged from 3 - 7 sites over the course of the year. Small samples can cause fluctuation in the data.

N.B. This data does not include privately owned static caravans, which may be rented out.

Occupancy on static chalet sites ranged from a low point of 30% in winter to a high of 86% in the peak season.

- The year started with occupancy down on previous years but performance improved in subsequent seasons.
- Occupancy in winter, usually a quiet time in this sector, was well ahead of previous years.
- Spring occupancy was level with last year and spring 2004 and ahead of spring 2005, however it was down on 2003.
- Peak season occupancy was up versus last year and level with the previous two years, but below the peak in 2003.

Isle of Wight self catering accommodation
Chalet/Static sites
2006/2007 vs previous years

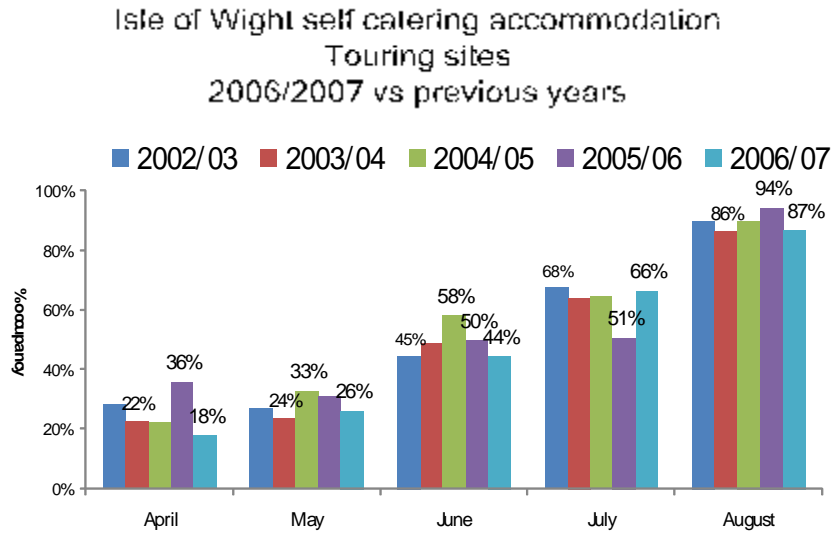


13.4 Camping/touring sites

Data is based on responses from 4 sites this year hence results can only be used as an indication of performance in this sector. The chart shows the pitch occupancy for the important months for these sites, when most are open.

Pitch occupancy ranged from 18% in April, up to 87% in August.

Looking at the performance over time, pitch occupancy is fairly consistent. Despite the poor weather this year, occupancy on this sample of sites was down only a few points in June and August and was up in July. During August it has fluctuated around 90% occupancy during the five year period illustrated.



13.5 Peak season capacities

The table below shows the available capacity during the month of August when the Island is at its busiest.

This data illustrates that there is little availability in the rented self catering sector but that there is considerable availability across the serviced sector, especially in guesthouses (4 -10 rooms) and small hotels (10 - 25 rooms).

	Self catering accommodation			Serviced accommodation			
	Cottages/ flats/ houses	Static chalets sites	Touring sites	1-3 room	4 - 10 room	10 - 25 room	26+ room
Available space	8%	7%	13%	29%	32%	38%	26%