

Isle of Wight Tourism
Activity monitor

Tourism year
2001/2002

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.

Some data included in this report is provisional data as this is written before final data has been released.

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

At the close of 1999, it was decided to use a new reporting year running from early September through to the end of the peak season. This means that businesses will now receive a full year report in November to aid their planning for the following year's business. This is referred to as the Tourism Year. The reporting periods for the tourism year 2000/2001 are:

- first quarter: post summer peak to end of calendar year: 3/9/2001 - 31/12/2001
- second quarter: January to two weeks before Easter: 1/1/2002 – 17/3/2002
- third quarter: two weeks before Easter to the summer peak: 18/3/2002- 14/7/2002
- fourth quarter: the summer peak season : 15/7/2002 - 1/9/2002.

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1. Introduction and overview

This report provides commentary on the Isle of Wight tourist industry for the tourism year 2001/2002 which ran from 3rd September 2001 to 1st September 2002. Comparisons will be drawn with previous years.

At the start of this tourism year the 9/11 terrorist attack on the World Trade Centre occurred. This had a dramatic effect on all industries and UK domestic tourism was no exception. Many people changed their travel plans and the British Tourist Authority estimated that inbound tourism was reduced by £2.5 billion. However the English Tourism Council estimated that one million UK residents changed their plans for holidaying abroad and took a UK holiday.

When drawing comparisons with previous years, in addition to the 9/11 attack, other significant events which have influenced tourism should be borne in mind. In 1999/2000 there were the millennium celebrations; in autumn 2000 the petrol crisis brought the country to a standstill and impacted significantly on domestic tourism; in spring 2001 the foot and mouth outbreak halted travel to the British countryside for several weeks. Even though the Isle of Wight remained free of foot and mouth disease, tourism to the Island was cut drastically for a period.

Over the three years covered by this report, the economy has been very stable with low inflation, low interest rates and therefore low mortgage repayments and low unemployment.

Other changes that have affected tourism in general include the introduction of the Euro and the phenomenal rise in the use of the internet both to plan and book holidays. In 2001 on-line bookings across Europe were estimated to be up 66% on 2000 and an increase of 46% is predicted for 2002. The UK and Germany are the largest on-line travel markets in Europe.* Isle of Wight businesses need to ensure that they are equipped to benefit from this increasingly important sales channel.

During the 2001/2002 tourism year there were just over 2.5 million visits to the Isle of Wight, arriving by ferry. Despite 9/11, tourism to the Island held up well and the number of visits is at a very similar level to 2000/2001. However it is 4% below 1999/2000.

The composition of these 2.5 million trips shows what sort of tourism is important to the Isle of Wight. Whilst there are a whole host of reasons for visiting the Island, it is still very much a holiday island. A third of all visits are holidays or short breaks. This equates to 874,000 visits to the Island.

There is some evidence to suggest that short break holidays to the Island may be declining, certainly the estimated number of short breaks is down over the three year period. This needs addressing to ensure the Island does not miss out on this important market sector.

On a more positive note, the all important, longer holidays have increased in number: 4+ night holidays were up 4% over the three year period. These longer holidays were estimated to have generated a demand for 3.9 million bednights.

In addition the length of these 4+ night holidays has increased slightly. However it appears that it is the self catering sector which is benefiting from this increase in length of stay: serviced accommodation guests have been taking increasingly shorter stays over the three year period.

* Source: Centre for Regional Tourism Research

Other important contributors to tourism are trips to visit friends and relatives which generated 516,000 visits and business trips which generated another half a million visits. However business trips to the Island have declined over the three year period.

The value of these 2.5 million trips is estimated to be £314 million. Excluding inflation this represents an increase of just over 2% versus 2000/2001. Therefore, although the number of visits to the Island remained constant over the two years, the value increased, primarily due to the increase in the number of longer stay (4+ nights) holidays.

2. Summary of key points in 2001/2002 tourism year

Specific key points this year and comparisons with the last two years include:

- 2.54 million visitors arrived by ferry which is in line with 2000/2001 but 4% down on 1999/2000 levels.
- 2.37 million domestic visitors (no change vs. 2000/2001; -5% vs. 1999/2000);
- 1.1 million domestic day visits (no change vs. 2000/2001; -5% vs. 1999/2000);
- 1.3 million domestic staying visits (no change vs. 2000/2001; -5% vs. 1999/2000);
- 301,000 short stay holidays/leisure trips lasting 1 - 3 nights, a decline of 10% vs 2000/2001 and 8% below 1999/2000;
- 541,000 holidays lasting 4+ nights, an increase of 6% vs 2000/2001 and 2% up on 1999/2000
- length of stay of all domestic visits was 4.6 nights which is similar to previous years (2000/2001: 4.5 nights; 1999/2000: 4.8 nights);
- almost half a million business visits (496,000 domestic and abroad combined) most of which were day trips (80%). Total business trips are 5% down on 2000/2001 and 13% below 1999/2000;
- 160,000 overseas visitors which is slightly more than in the last two years (+10% vs. 2000/2001; +4% vs. 1999/2000);
- bedspace occupancy within serviced accommodation ranged from 20% in the winter (Q2) to 78% in the peak (Q4). The average across the year was 46% which is up 3 points versus last year and level with 1999/2000;
- room occupancy within serviced accommodation ranged from a low of 25% in the winter (Q2) to a high of 84% in the peak (Q4). It averaged 51% which is on a par with last year but down 4 points on 1999/2000;
- average length of stay in serviced accommodation ranged from 2.7 nights in the winter (Q2) to 4.9 in the peak (Q4). This is a decrease on the last two years;
- occupancy within self catering houses/cottages/flats (1-10 units) ranged from a low of 9% in the winter (Q2) to a high of 95% in the peak (Q4). Spring and peak season occupancy was higher than last year;
- attractions were visited by two fifths (42%) of leisure visitors (free or with admission fee combined) which is at the same level as last year. Staying visitors were more likely to visit attractions than day visitors;
- there were over 385,000 visitors to Tourist Information Centres which is 13% less than in 2000/2001;
- bookings taken via TIC's declined as did bookings via the Hotline;
- unemployment reached a new low point of 3.6% in August which is the lowest recorded level.

3. Weather on the Isle of Wight

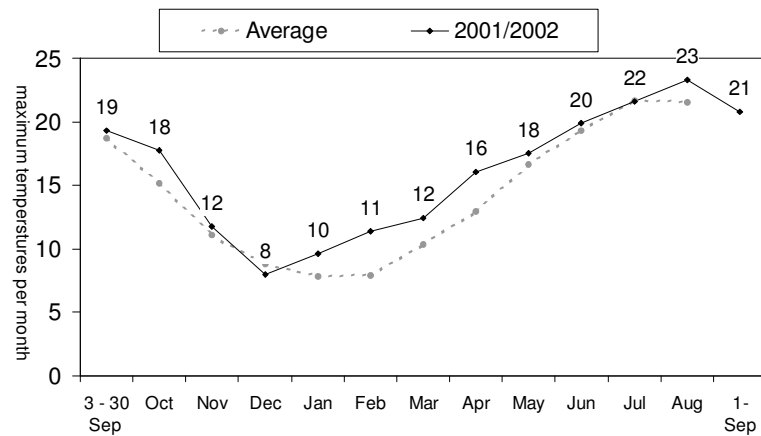
Continuous recording and reporting of weather is provided by Medina Valley Centre, Newport. Temperature, sunshine hours and rainfall can be compared with the 32 year average (1969 - 2000) to show how typical the current weather is.

The following charts show weather for the year together with the long term average.

3.1 Maximum temperatures

This year was slightly warmer than average. Maximum temperatures were above the long term average during October, from January through to June and during August. At no point did maximum temperatures fall significantly below the average.

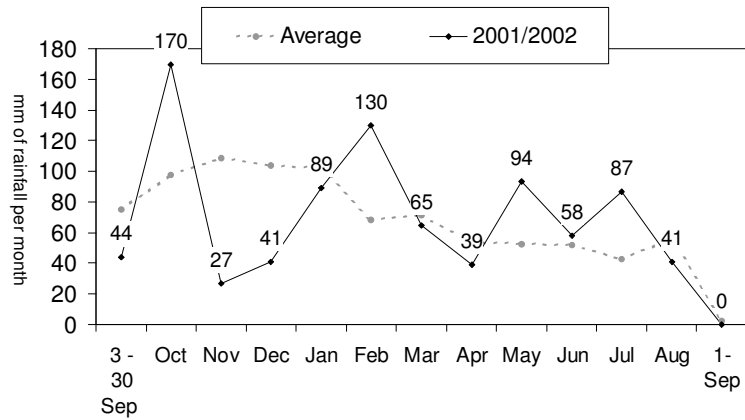
Maximum temperatures on the Isle of Wight
Tourism year 2001/2002 vs long term average



3.2 Rainfall

Total rainfall for the year reached 883mm which was just 6 mm below the average but through the year it fluctuated considerably versus the long term average. October, February, May and July were particularly wet versus the average which meant that several school holidays coincided with wet weather. However, there was only 41mm of rain in August compared with a norm of 56mm.

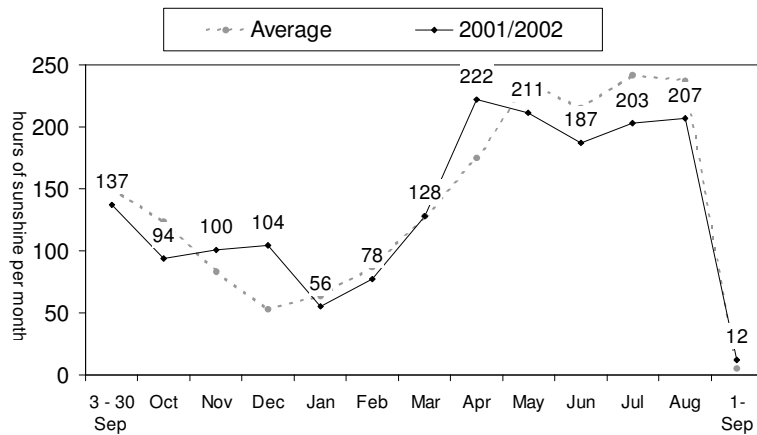
Rainfall on the Isle of Wight
Tourism year 2001/2002 vs long term average



3.3 Sunshine hours

Across the year the Island had 4% less sunshine than average. However, for much of the summer period (May, June, July and August) sunshine hours were well below the average ranging from 11% below the average in May to 16% below in July.

Sunshine on the Isle of Wight
Tourism year 2001/2002 vs long term average



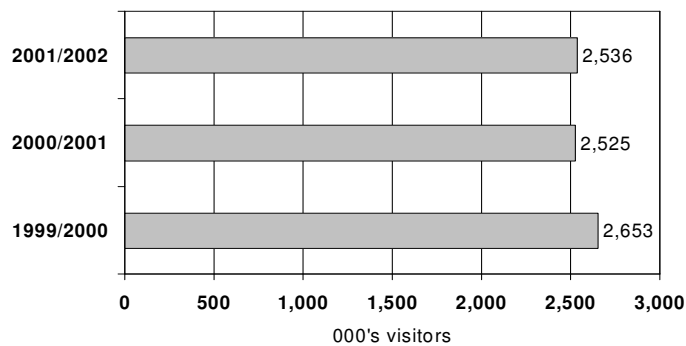
4. Visits to the Isle of Wight

4.1 Estimated visitor numbers

During the 2001/2002 tourism year there were just over 2.5 million visits to the Isle of Wight, arriving by ferry. These include both domestic and overseas visitors to the Island. The data in this report excludes visitors arriving by yacht due to the lack of and inconsistency of data available.

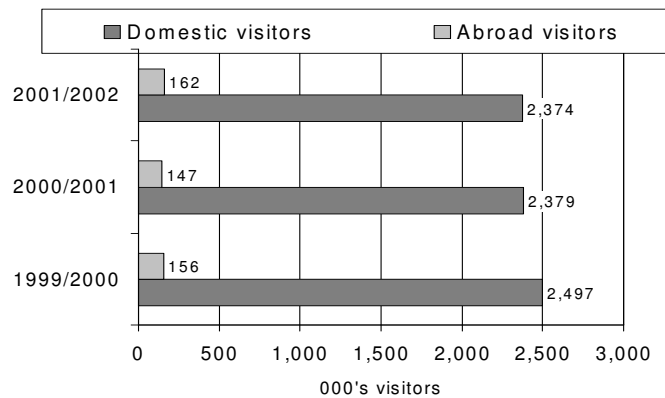
This is at a very similar level to the previous year but is a 4% decline since 1999/2000. The trend is shown in the chart below.

Estimated annual number of total visitors
Tourism year 2001/2002 vs previous years



Visitors are predominately domestic visitors: only a small percentage travel to the Island from abroad, as shown below. Visitors from abroad are estimated to have increased by 4% over time whereas domestic visitors declined this year by 5% versus 1999/2000, although they remained at the same level as 2000/2001.

Estimated annual number of domestic and abroad visitors
Tourism year 2001/2002 vs previous years



4.2 Domestic visitors' type of trip

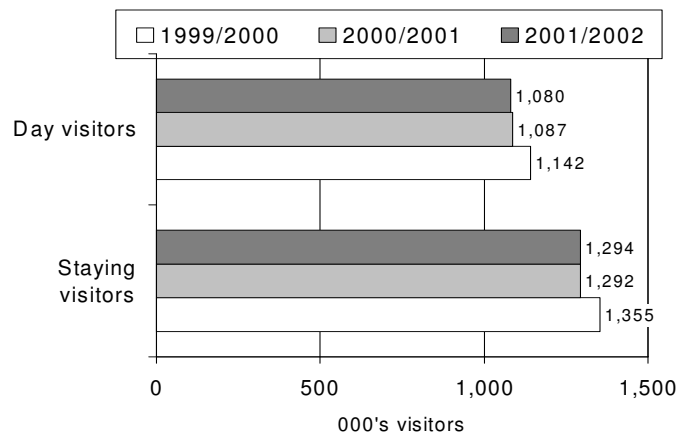
This section deals with the domestic market.

Visitor trips can be divided into day visits and staying visits. Just over half of all domestic visits are staying visits, a proportion which has remained static over the last three years.

	1999/2000	2000/2001	2001/2002
Day visitors	46%	46%	45%
Staying visitors	54%	54%	55%

The following chart shows the actual number of day and staying domestic visitors over time. Whilst the number of staying and day trips is at a similar level to last year, both have declined by around 5% versus 1999/2000.

Estimated annual number of domestic staying and day visitors
Tourism year 2001/2002 vs previous years



4.2.1 Domestic day visits

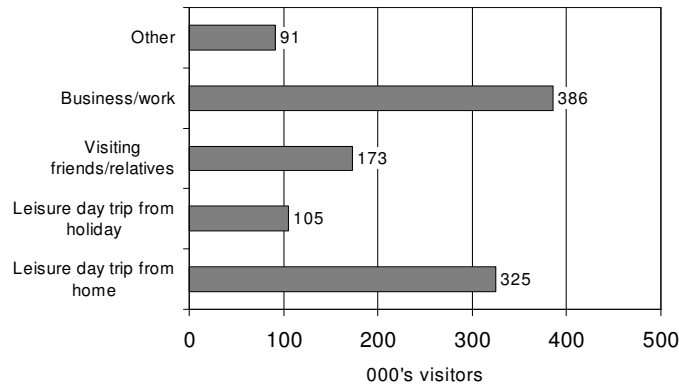
4.2.1.1 Domestic day visitors' type of trip

Further analysis of the domestic day visits shows the purpose of the trip. The chart below gives a breakdown of the one million trips with an estimated number of each trip type.

Leisure day trips were the most important reason for making a day trip to the Island and there were 430,000 of these trips. The majority of these were made as day trips starting from home, the remainder being trips made by people whilst on holiday in the area.

Business travel was another significant reason for visiting the Isle of Wight; this generated 386,000 trips. Day trips to visit friends/ relatives generated 173,000 visits.

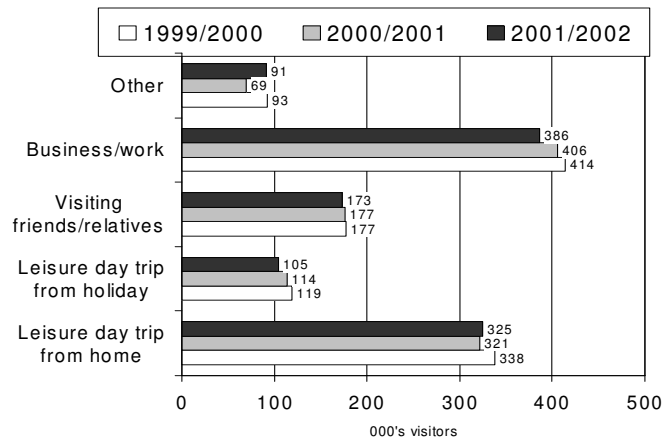
Purpose of day trips amongst domestic visitors
Tourism year 2001/2002



Over the last three years, there have been small changes in the specific reasons for taking a day trip to the Island, for example business day trips are down 7% versus 1999/2000 and day trips taken whilst away on holiday are down by 12% versus 1999/2000.

This is shown on the following chart.

Purpose of day trips amongst domestic visitors
Tourism year 2001/2002 vs previous years



4.2.1.2 Profile of domestic day visitors

Group composition reveals a strong bias towards adult only groups of visitors: 85% of day visitor groups comprised just adults; adult only groups dominated all day visitor types.

There have been no changes over time, as shown below.

	Adult only groups		Adult and children groups	
	2000/2001	2001/2002	2000/2001	2001/2002
All day visitor groups	86%	85%	14%	15%
Leisure day visitor (from home)	75%	73%	25%	27%
Leisure day visitor (whilst on holiday)	67%	70%	33%	30%
Visiting friends/relatives	80%	80%	20%	20%
Business or business/leisure combined	99%	99%	1%	1%

4.2.1.3 Domestic day visitors' origin

The most important counties in terms of origin of day visitors to the Isle of Wight are shown on the table below. 2001/2002 is shown together with previous years. Percentage of day visits originating from each county is given to allow comparisons over time.

The dominance Hampshire as a source of day trippers has remained constant over time. There has been little change in the volumes arriving from other counties.

County	Est'd % of visits 1999/2000	Est'd % of visits 2000/2001	Est'd % of visits 2001/2002
Hampshire	50%	52%	51%
Greater London	7%	6%	8%
West Sussex	6%	5%	6%
Dorset	7%	6%	5%
Surrey	5%	6%	5%
Berkshire	2%	3%	3%
Wiltshire	2%	2%	3%
East Sussex	3%	2%	2%
Somerset (inc. Bristol)	2%	2%	2%
Kent	2%	2%	1%

4.2.2 Domestic staying visits

4.2.2.1 Domestic staying visitors' type of trip

There were just under 1.3 million (1,294) domestic staying visits, which is level with 2000/2001 but down 5% versus 1999/2000.

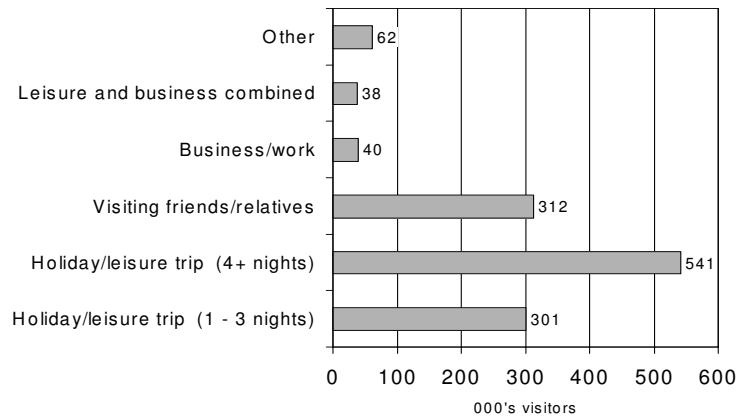
The estimated number of each type of staying trip is shown in the following chart.

Holidays/leisure visits were by far the most important reason for visiting the Island with 842,000 of these trips; this is almost 70% of all staying trips.

Two thirds of holiday visits (541,000) were holidays lasting 4+ nights; short stays of 1 – 3 nights duration accounted for 301,000 visits.

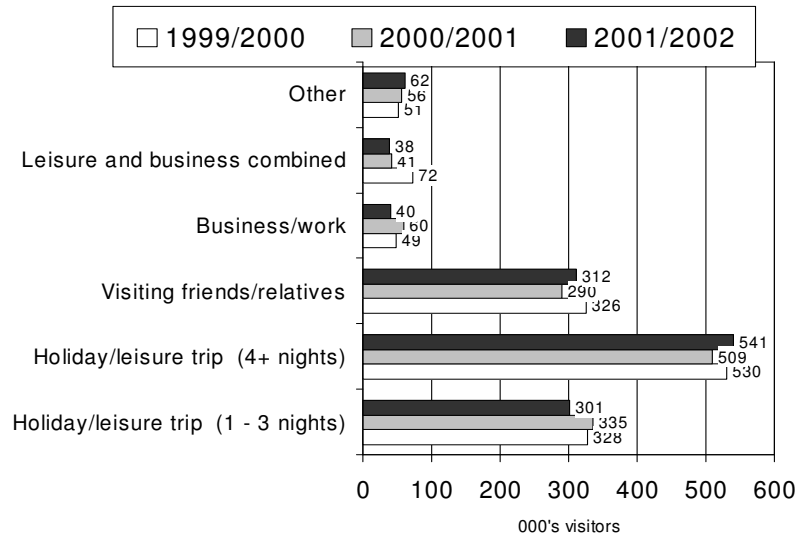
Staying trips to visit friends/relatives were the only other significant reason for visiting accounting for 312,000 trips. Staying business trips and business trips combined with leisure were at a low level.

Purpose of staying trips amongst domestic visitors
Tourism year 2001/2002



Comparisons over time are shown below. There has been a small increase in the number of longer holidays (4+ nights) with an estimated 10,000 more long holidays versus 1999/2000. There has been a corresponding decline in the number of short breaks (1 – 3 nights): these are down by an estimated 28,000 since 1999/2000. Business travel is also down versus previous years. Visiting friends and relatives travel has regained some of the ground lost last year but remains 4% down on 1999/2000.

Purpose of staying trips amongst domestic visitors
Tourism year 2001/2002 vs previous years



4.2.2.2 Domestic staying visitors' length of stay

The average length of stay was 4.6 nights which is similar to the last two years, as shown below.

Over the three year period there has been a slight increase in the length of the 4+ nights holidays which may show the start of an on-going trend. Meanwhile VFR trips have shortened over time.

Type of domestic trip	Average length (nights)		
	1999/2000	2000/2001	2001/2002
1 – 3 night holiday	2.2	2.2	2.2
4+ night holiday	6.9	7.0	7.1
Visiting friends/relatives	3.6	3.4	3.3
Business*	3.9	4.9	3.9
<u>All domestic staying trips</u>	<u>4.8</u>	<u>4.5</u>	<u>4.6</u>

* Caution: small base size

Length of short stay and longer stay holidays taken can also be analysed as 1 – 4 nights and 5+ nights which better reflects the pricing systems operated by the ferry companies. This shows an overall increase over the last two years of the longer holidays (5+ nights) but a corresponding decrease in short breaks.

	1999/2000	2000/2001	2001/2002
Length of holiday	000's trips		
1 – 4 night holiday	505	467	474
5+ night holiday	352	377	368

4.2.2.3 Demand for bednights

The demand for bednights from domestic visitors is estimated at just below 6 million nights. After allowing for the proportion of these which would not be taken in commercial accommodation (trips to visit friends and relatives), just under 5 million bednights were needed in commercial accommodation by domestic visitors.

The demand created from different types of visitors is shown in the following table. This illustrates the heavy dependence of the Island's economy on the longer stay tourist in the peak season; 78% of bednights were needed for those on a longer stay holiday (5+ nights).

Type of trip	Number of bednights (millions)
4+ night holiday	3.9
Short stay (1 – 3 nights)	0.7
Visiting friends/relatives	1.0
Business or leisure & business combined	0.5

Demand for bednights over time is shown below. This shows a slight decline over time although demand has increased versus last year.

Millions of bednights	1999/2000	2000/2001	2001/2002
Estimated bednights in commercial accommodation	5.3	4.8	5.0

4.2.2.4 Profile of domestic staying visitors

Visitor group composition shows a strong bias towards adult visitors and this is shown below.

Across the whole year one fifth of all groups visiting the Island on a staying trip were groups with adults and children. There has been no significant change over time.

	Adult only groups		Adult and children groups	
	2000/2001	2001/2002	2000/2001	2001/2002
All staying visitor groups	81%	79%	19%	21%
Holiday/leisure trip	77%	74%	23%	26%
Visiting friends/relatives	83%	83%	17%	17%
Business or business/ leisure combined	99%	99%	1%	1%

4.2.2.5 Domestic staying visitors' origin

Staying visits originated from a much wider spread of areas than day visits.

The following chart shows the counties which produced at least 2% of staying visits. The majority of these counties are in the South with relatively easy access to the ports.

For the first year since the survey began in 1999, Greater London produced slightly more staying visits than Hampshire. Surrey continued to be the third most important area. Other differences occurring over time are minimal.

County	Est'd % of visits 1999/2000 000's	Est'd % of visits 2000/2001 000's	Est'd % of visits 2001/2002 000's
Greater London	15%	14%	14%
Hampshire	16%	15%	13%
Surrey	7%	8%	8%
Kent	5%	5%	6%
Essex	4%	4%	4%
Yorks (total)	4%	3%	4%
Herts	3%	3%	3%
West Sussex	3%	4%	4%
Berkshire	3%	3%	3%
East Sussex	2%	3%	3%
Dorset	3%	3%	3%
West Mids.	3%	3%	3%
Somerset (inc. Bristol)	3%	3%	3%
Oxon	2%	2%	3%
Wales	2%	2%	2%
Lancashire	2%	2%	1%

4.3 Purpose of business trips

There were almost half a million business trips this year. Last year the decline in business trips was attributed primarily to the foot and mouth outbreak but volumes have not recovered this year. Business trips this year showed a significant decline on previous years (-5% vs 2000/2001; -13% vs. 1999/2000).

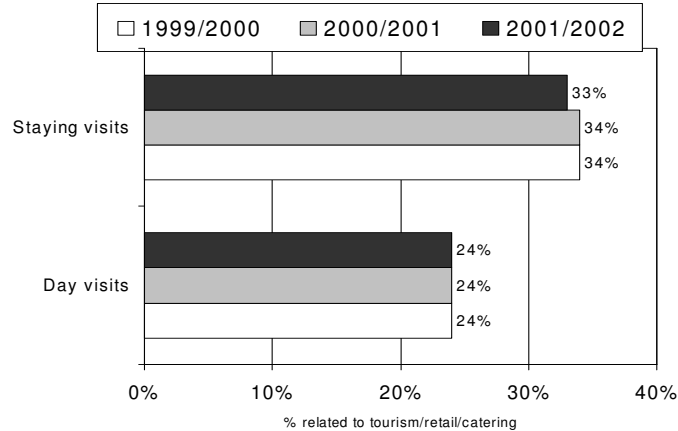
000's trips	1999/2000	2000/2001	2001/2002
All trips	572	523	496
Domestic trips	535	507	464
Overseas trips	37	16	32

The vast majority (80%) of business travel to the Isle of Wight involves day trips rather than staying trips.

In order to evaluate the importance of the tourist industry in terms of generating business travel to the Isle of Wight, business visitors were asked whether their business area was related to the tourism/retail/catering sector.

A quarter of day trips and a third of staying trips were generated by the tourism sector. These proportions have remained constant over the three year period.

Importance of business trips
Tourism year 2001/2002 vs previous years



4.4 Overseas visitors

Visits by people originating overseas reached 162,000 this year. 88,000 of these were staying visits, the remaining 74,000 being day trips to the Island. The primary reasons for visiting the Island were:

	Trips 000's
Leisure day trip	58
Holiday	31
VFR:	31
• Staying	25
• day trip	6
Business:	32
• Staying	23
• day trip	9

Despite the reduction in incoming tourism to the UK this year, the estimated volume of overseas visitors has increased over the last two years. It is estimated to be up 10% versus 2000/2001 suggesting that this market has recovered from the effect of the foot and mouth outbreak.

	1999/2000	2000/2001	2001/2002
	%	%	%
Visitors 000's	156	147	162

There have been fluctuations in the country of origin over the last two years, which may reflect the effect of the foot and mouth and 9/11. The most apparent change is the decreasing importance of visitors from USA. Alongside this visitors from Germany have increased. This is shown in the following table.

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

Origin of overseas visitors			
Country	Est'd % of visits 1999/2000 000's	Est'd % of visits 2000/2001 000's	Est'd % of visits 2001/2002 000's
Germany	9%	7%	14%
USA	18%	14%	10%
Australia	6%	9%	8%
Netherlands	8%	4%	7%
France	7%	6%	7%
South Africa	5%	4%	7%
Italy	3%	9%	5%
Spain	3%	2%	5%
Finland	*	*	4%
Canada	5%	5%	3%
New Zealand	4%	5%	3%
Eire	2%	4%	3%
Sweden	5%	1%	2%
Switzerland	3%	2%	2%
Japan	2%	2%	2%
Austria	1%	4%	2%
Hong Kong	2%	1%	1%
Denmark	1%	5%	1%
Norway	1%	1%	1%

* Less than 1%

4.5 The coach market

During the year there were 12,557 coaches travelling to/from the Island (return journeys). This is a slight increase on last year but over the three year period the market has remained fairly static.

N.B. Coach data includes Isle of Wight residents and visitors.

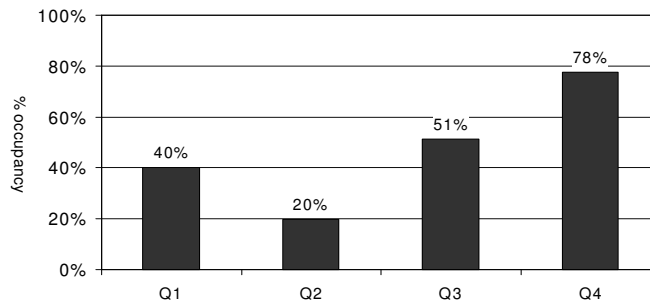
5. Demand for accommodation on the Isle of Wight

5.1 Hotels, guesthouses and Bed & Breakfast occupancy

5.1.1 Bedspace occupancy

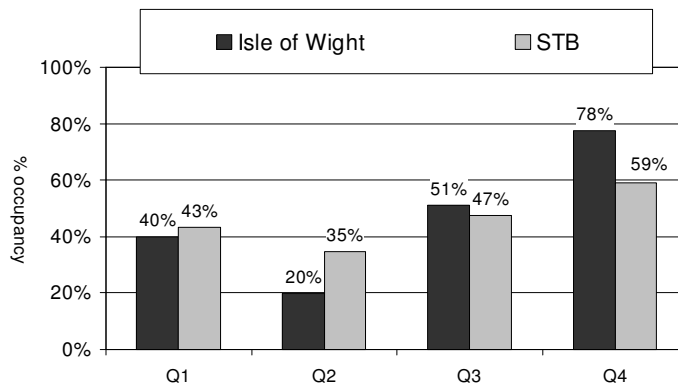
Bedspace occupancy levels across all catered accommodation are shown below. This ranged from a low of 20% in the spring (Q2) up to 78% in the peak (Q4).

Isle of Wight hotels/guesthouses/B&B's
Bedspace occupancy 2001/2002



The Isle of Wight exceeded bed occupancy for the Southern region in the spring and peak periods (Q3 and Q4). Performance in the peak period was significantly better than the Southern region at +19 points. In the first and second quarters, periods when city and town destinations are more popular destinations, bed occupancy was below the Southern region average.

Isle of Wight hotels/guesthouses/B&B's
Bedspace occupancy 2001/2002
Isle of Wight vs STB

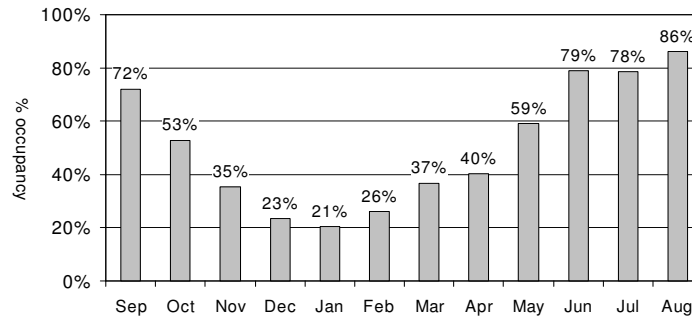


The average bedspace occupancy across the year was 46%. This was up 3 points on 2000/2001 (43%) and on a level with 1999/2000 (46%).

5.1.2 Room occupancy

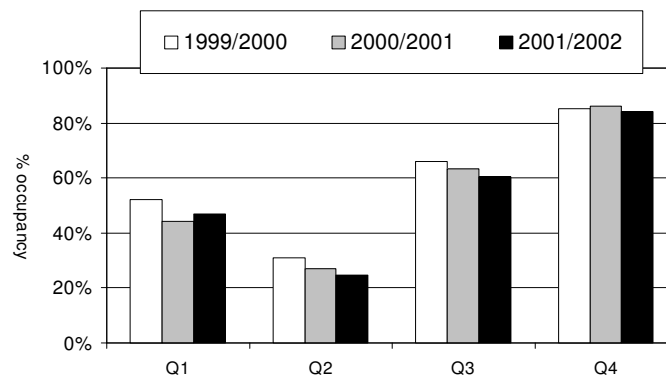
Room occupancy ranged from a low point in January of 21% up to a high of 86% in August. June, July and September were also months of high occupancy levels.

Isle of Wight hotels/guesthouses/B&B's
Room occupancy in 2001/2002



The average room occupancy across the year was 51% which is at the same level as last year but down from 55% in 1999/2000. The following chart shows the trend by quarter over time and illustrates how room occupancy has fallen during the winter (Q2) and spring (Q3) quarters in the last two years.

Isle of Wight hotels/guesthouses/B&B's
 Room occupancy 2001/2002 vs previous years

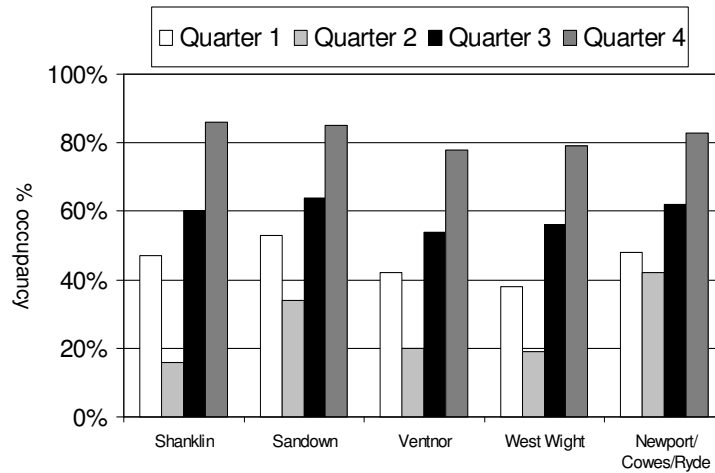


Room occupancy varied between different types of establishment. At all times the larger establishments achieved considerably higher room occupancy levels.

Room occupancy	1 – 3 rooms	4 – 10 rooms	11 – 25 rooms	26+ rooms
Quarter 1	28%	34%	41%	57%
Quarter 2	17%	18%	25%	29%
Quarter 3	52%	47%	51%	70%
Quarter 4	78%	79%	79%	89%

There were some variations in room occupancy between areas although these were not as pronounced as the differences by size of establishment.

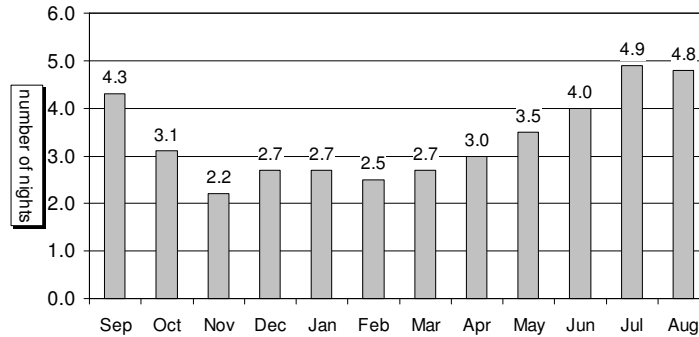
Isle of Wight hotels/guesthouses/B&B's
Room occupancy 2001/2002



5.1.3 Length of stay in serviced accommodation

Average length of stay within the serviced sector is shown on the next chart. Short stays are the norm through the winter months with length of stays between 2.2 and 2.7 between November and March. 4.9 nights recorded in July, was the longest stay.

Isle of Wight hotels/guesthouses/B&B's
Length of stay in 2001/2002



Average length of stay varied considerably according to the size of establishment. The largest hotels (26+ rooms) consistently attracted longer stay visitors, as shown below.

Average no of nights	1 – 3 rooms	4 – 10 rooms	11 – 25 rooms	26+ rooms
Quarter 1	1.4	3.5	3.3	3.6
Quarter 2	1.3	2.9	2.2	3.1
Quarter 3	2.2	3.3	3.3	4.2
Quarter 4	3.4	4.9	5.0	5.3

Looking at length of stay over time, shown below, this seems to be declining at all times of the year. This year length of stay in the peak period (Q4) was down significantly at 4.9 nights versus 5.9 nights two years ago meaning that the establishments are having to attract more customers in order to achieve the same level of occupancy.

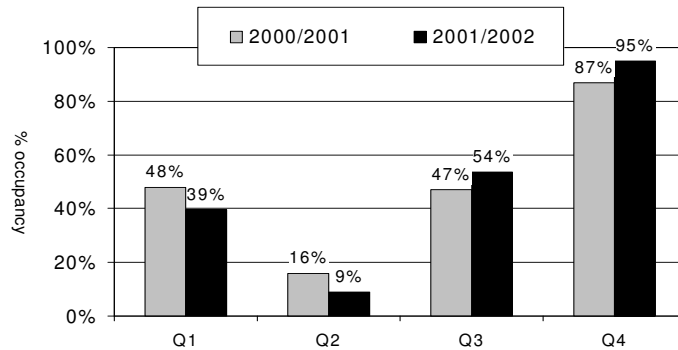
Average no of nights	1999/2000	2000/2001	2001/2002
Quarter 1	3.6	3.4	3.4
Quarter 2	3.0	2.8	2.7
Quarter 3	4.0	3.8	3.7
Quarter 4	5.9	5.3	4.9

5.2 Self catering cottages, houses and chalets (1 - 10 units)

Occupancy in self catering units ranged from a very low point of 9% in the winter (Q2) quarter to a high of 95% in the peak (Q4) season.

During the autumn (Q1) and winter (Q2) quarters occupancy was below last year but in the spring (Q3) and peak season occupancy was significantly higher than last year.

Isle of Wight self catering accommodation
Occupancy in 1 – 10 units
2001/2000 vs. 2000/2001

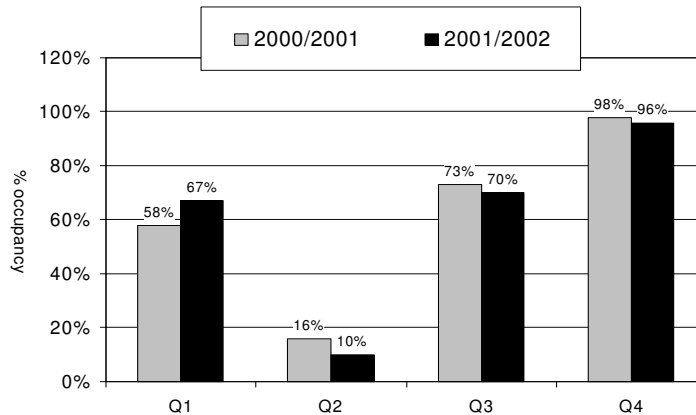


5.3 Self catering cottages, houses and flats (11+ units)

Occupancy in this sector ranged from 10% in winter to 96% in the peak season.

Performance last Autumn (Q3) was well above the previous year but occupancy was down on last year for the remainder of the year.

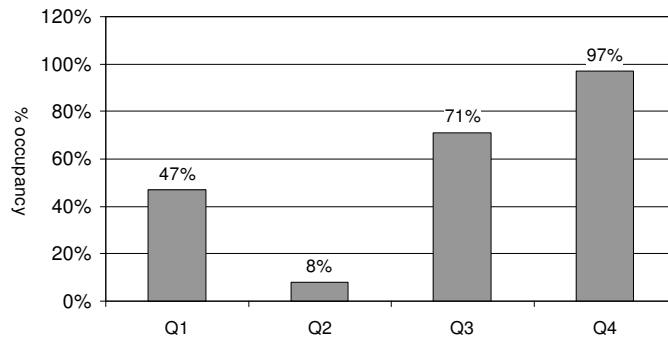
Isle of Wight self catering accommodation
Occupancy in 11+ units
2001/2000 vs. 2000/2001



5.4 Static sites

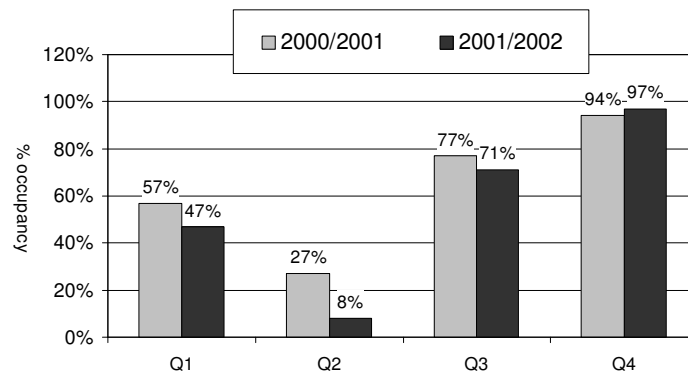
Occupancy on static sites went down to 8% in winter (Q2) but these sites were almost full at 97% throughout the peak season (Q4). Spring was also a good period (Q3) with occupancy reaching 71%.

Isle of Wight self catering accommodation
Chalet/Static sites 2001/2002



Comparing this with last year shows that occupancy was below 2000/2001 each quarter until the peak season when it went 3 points above last year.

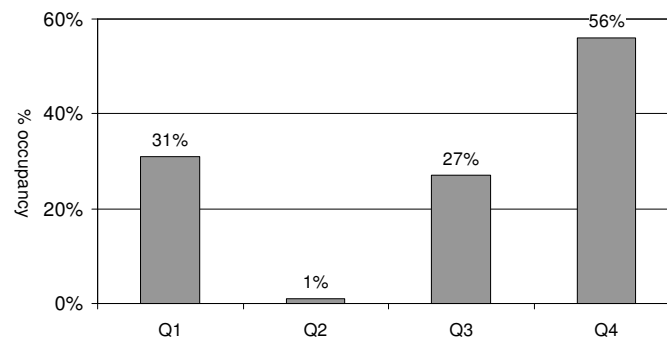
Isle of Wight self catering accommodation
_Chalet/Static sites
2001/2002 vs 2000/2001



5.5 Camping/touring sites

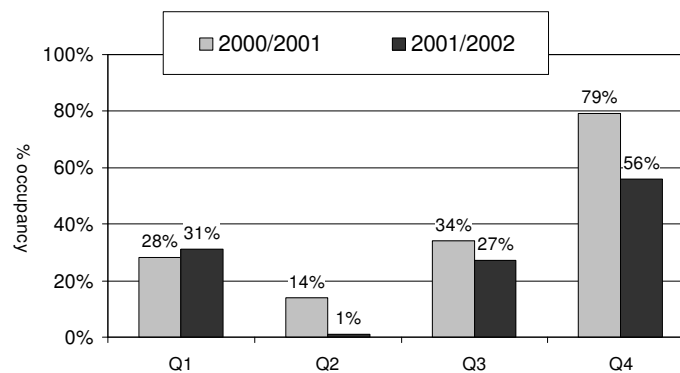
These sites had a reasonable autumn and spring (Q1 and 3) but in the peak season pitch occupancy was disappointing at 56%. This is probably attributable to the wet weather experienced during July: occupancy during the month of July was just 41%.

Isle of Wight self catering accommodation
Touring sites 2001/2002



In all periods, pitch occupancy was below last year. The drop in performance was particularly marked in the peak season when it fell from 79% to 56%.

Isle of Wight self catering accommodation
Touring sites
2001/2002 vs 2000/2001



6. Value of tourism

The monetary value of tourism on the Isle of Wight is estimated to be around £314 million for the tourism year 2001/2002.

Staying trips generated the majority of this. These are estimated to be worth £277 million. Of this, domestic staying trips contributed £240 million.

It is estimated that day trips add another £37 million to the value of tourism. Over 90% of this is from domestic day trips.

	£Millions
<u>Staying trips</u>	
All domestic staying trips	£247
All overseas staying trips	£30
<u>All staying trips</u>	<u>£277</u>
<u>Day trips</u>	
<u>All day trips</u>	<u>£37</u>

The value of tourism, is estimated to have increased by just over 2%, excluding the effect of inflation, since 2000/2001. Therefore, although the number of visits to the Island has remained constant over the two years, the value has increased, primarily due to the increase in the number of longer stay (4+ nights) holidays.

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.

7. Attractions

In order to ensure that some relevant statistics are made available for visits to attractions, leisure visitors returning from the Isle of Wight, are asked whether they visited a free or paid for attraction 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.

Two fifths (42%) of all leisure visitors visited an attraction which was free and/or with admission fee.

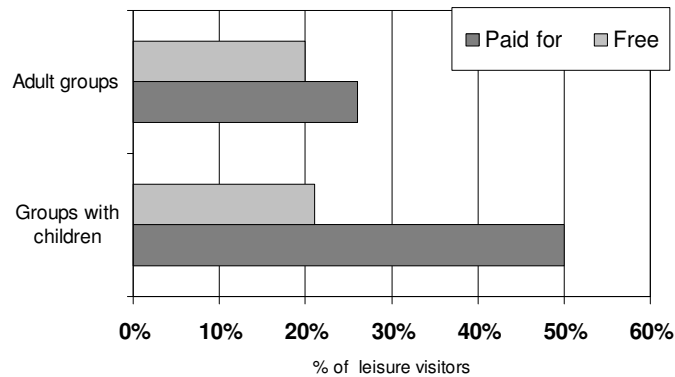
Staying visitors were more likely to visit attractions than day visitors. Visits by staying visitors to both free and paid for attractions were above that for day trippers.

	Day visitors	Staying visitors
Visit to any attraction	31%	48%
Visit a free attraction	15%	22%
Visit a paid for attraction	19%	38%

Presence of children in the party has a strong positive effect on likelihood to visit paid for attractions. 58% of groups with children visited an attraction versus 38% of adult only groups. It is the paid for attractions which are much more likely to be visited by those with children.

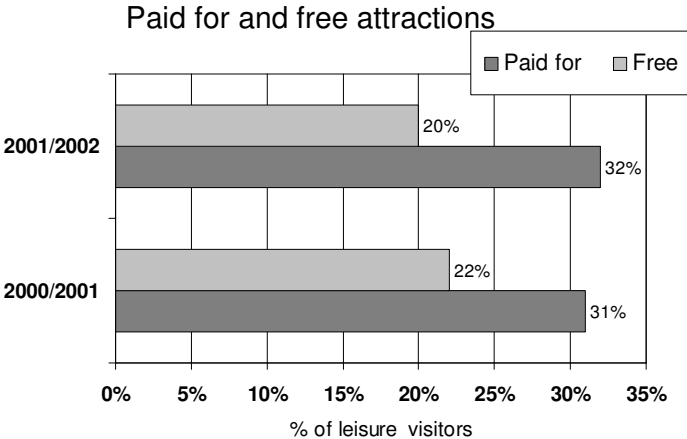
Estimated visits to attractions Tourism year 2001/2002

Groups with children vs adult groups



Visits to attractions are on a par with last year; 42% visited this year versus 41% last year. Paid for attractions continue to attract more visitors than the free attractions, as shown below.

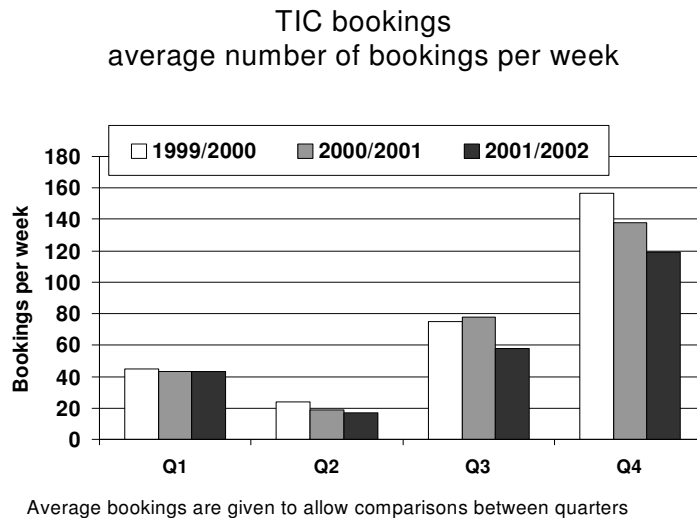
Estimated visits to attractions
Tourism year 2001/2002 vs 2000/2001



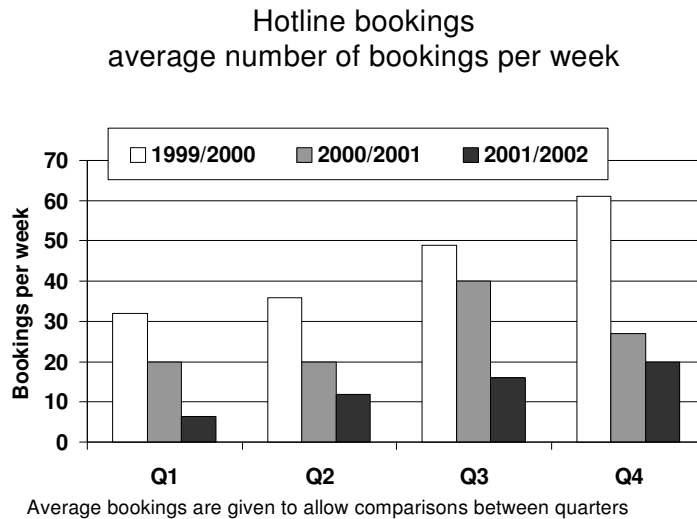
8. Isle of Wight Tourism activity levels

8.1 Tourist Information Centres and Hotline

The number of visitors calling at the seven Island Tourist Information Centres reached 385,000 in the year, which is 13% below last year. This is also significantly down on 1999/2000. The chart below shows the average number of bookings per week made by visitors to the centres. This illustrates the decline in bookings over time, particularly in the peak season.



The Hotline operates alongside the TIC's although a smaller proportion of bookings are made via the Hotline. Bookings via the Hotline have declined quite dramatically over time, as shown on the chart.



The Hotline serves a late booking short break market but does not attract the customer planning in advance or taking longer trips:

- 63% of holidays booked were for a one or two night stay, whilst only 20% were for a 5+ night holiday
- 67% of all bookings via the Hotline throughout the year were for a holiday in the next the weeks.

8.2 Website visits

There were 589,371 visits to the Isle of Wight Tourism website www.islandbreaks.co.uk during the year.

8.3 Brochure requests

167,000 brochures were mailed out during the year; over time the volume of brochure requests has been declining as more people use the internet to search for holiday information.

9. Unemployment levels on the Isle of Wight

The long term trend in unemployment (claimant) on the Isle of Wight continues downwards, in line with the UK and the South East. However there is a strong cyclical pattern to unemployment on the Island reflecting the importance of employment within the tourism sector.

During this tourism year, unemployment reached a high of 5.8% in January but had dropped to a low point of 3.6% by August.

The chart below shows claimant unemployment over time for the Island, the UK and South East.

