Isle of Wight Tourism
Activity monitor

Tourism year
2002/2003

108.110

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 2002/2003 are:

- first quarter: post summer peak to end of calendar year: 2/9/2002 - 31/12/2002
- second quarter: January to two weeks before Easter: 1/1/2003 – 6/4/2003
- third quarter: two weeks before Easter to the summer peak: 7/4/2003-13/7/2003
- fourth quarter: the summer peak season : 14/7/2003 - 31/8/2003.

Contents

1. Introduction and overview

This report provides commentary on the Isle of Wight tourist industry for the tourism year 2002/2003 which ran from 2nd September 2002 to 31st August 2003. Comparisons will be drawn with previous years.

Several months of this tourism year were affected severely by the war in Iraq. For much of the autumn period this was anticipated and then the war lasted through the winter ending early spring. Airlines and operators cut capacity and braced themselves for a difficult trading year. However once the war ended, operators reported that bookings quickly returned. International Passenger Survey* data for the year to the end of August now shows that visits abroad made by UK residents increased by 4.7% versus the previous 12 months; visits to the UK made by overseas visitors also increased and were up by 7% versus the previous 12 months (based on seasonally adjusted data).

The weather patterns during the year showed some of the greatest extremes in recent years. November was the wettest on record for many years yet the summer was the hottest.

When drawing comparisons with previous years, several events should be recalled. The most significant ones are the 9/11 attack in New York which occurred in 2001; the foot and mouth outbreak which halted travel to the British countryside for several weeks in spring 2001; the petrol crisis which brought the country to a standstill and impacted significantly on domestic tourism in autumn 2000 and the millennium celebrations.

Over the four 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. The pound has dropped a little in value against the Euro over the year (-11%) but remains fairly strong. Against the US dollar the pound has increased in value slightly and remains quite strong.

During the 2002/2003 tourism year there were almost 2.6 million visits to the Isle of Wight, arriving by ferry. This is up slightly (+1.2%) on last year, and 1.6% above 2000/2001 but 3.2% below 1999/2000.

The value of these 2.6 million trips is estimated to be £324 million. This is an increase of over 3% versus 2001/2002. Excluding the effect of inflation, the mix of tourism spending on the Island has increased the value by 1% versus last year.

The importance of leisure and holiday travel to the Isle of Wight remains extremely high: three quarters of all visits to the Island are for leisure. Through the year there were almost 900,000 holiday/staying leisure trips to the Island and over half a million of these were long holidays of 4+ nights. Together these generated a demand for 4.5 million bednights in commercial accommodation.

There were 50,000 more short breaks (1-3 nights) to the Island than last year but longer stay holidays (4+ nights) decreased by around 30,000.

Another important contributor to tourism is trips to visit friends and relatives which generated 534,000 visits. Business trips generated over 450,000 visits but have continued to decline over time.

Over 80% of leisure visitors coming to the Island in the peak season had visited before and over 50% had been before in the last 12 months, revealing a very satisfied customer base.

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

2. Summary of key points in 2002/2003 tourism year

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

- 2.57 million visitors arrived by ferry which is 1.2% up on 2001/2002, 1.6% up on 2000/2001 but 3.2% down on 1999/2000 levels;
- 2.41 million domestic visitors (+1.6% vs. 2001/2002);
- 1.1 million domestic day visits (no change vs. 2001/2002);
- 1.3 million domestic staying visits (+3% vs. 2001/2002);
- 352,000 short stay holidays/leisure trips lasting 1 - 3 nights, this is an increase of 17% vs. 2001/2002;
- 512,000 holidays lasting 4+ nights, a decrease of 5% vs. 2001/2002;
- length of stay of all domestic visits was 4.5 nights which is similar to previous years;
- 83% of day visitors and 84% of staying visitors in the peak season had been to the Island before. For many their last visit was in the last 12 months: 50% of day visitors and 52% of staying visitors;
- 457 thousand business visits (domestic and abroad combined) 80% of these were day trips. Total business trips have declined steadily over time;
- 155,000 overseas visitors (-4% vs. 2001/2002);
- 5.3 million bednights were needed in commercial accommodation;
- bedspace occupancy within serviced accommodation ranged from 21% in the winter (Q2) to 76% in the peak (Q4). The peak season level is significantly higher than the Southern region average of 61%;
- room occupancy within serviced accommodation ranged from 27% in the winter (Q2) to a high of 85% in the peak (Q4). It averaged 52% which is on a par with the last two years;
- average length of stay in serviced accommodation ranged from 2.5 nights in the winter (Q2) to 4.9 in the peak (Q4). Peak length of stay is level with last year;
- occupancy within self catering houses/cottages/flats (1-10 units) ranged from 22% in the winter (Q2) to a high of 91% in the peak (Q4). Winter and spring occupancy was higher than last year but autumn and peak season occupancy was down a little;
- attractions were visited by almost half (47%) of leisure visitors (free or with admission fee combined) which is an improvement versus last year. Staying visitors were more likely to visit attractions than day visitors;
- there were over 400,000 visitors to Tourist Information Centres which is 6% more than 2001/2002;
- unemployment was at 2.5% at the start of this tourism year but had reached a new low of 2.2% by August 2003. This is below the UK average of 2.6% but below the SE average of 1.5%.

3. Weather on the Isle of Wight

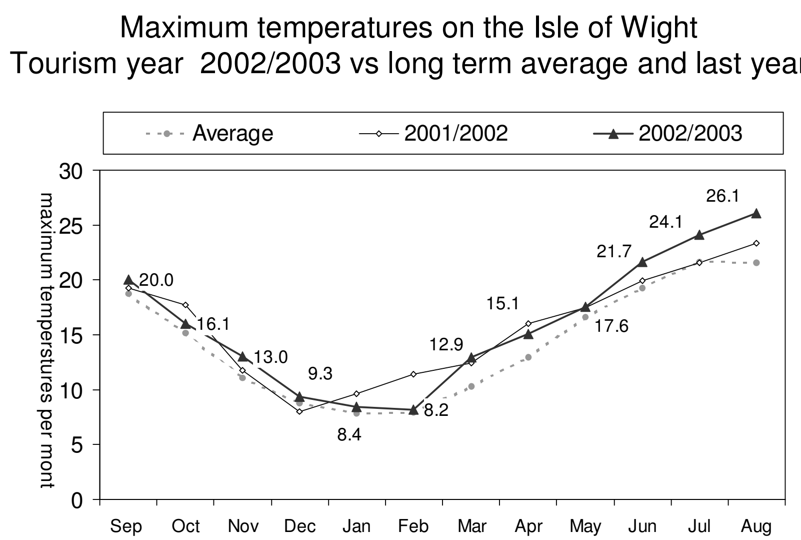
Continuous recording and reporting of weather is provided by Medina Valley Centre, Newport. Temperature, sunshine hours and rainfall can be compared with the long term average (1969 - 2000) to show how typical the current weather is.

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

3.1 Maximum temperatures

2002/3 was warmer than average throughout the year and temperatures were well above the average during June, July and August. In August the maximum temperature was 4.6 degrees above the average. During these summer months temperatures also exceeded last year by a significant margin.

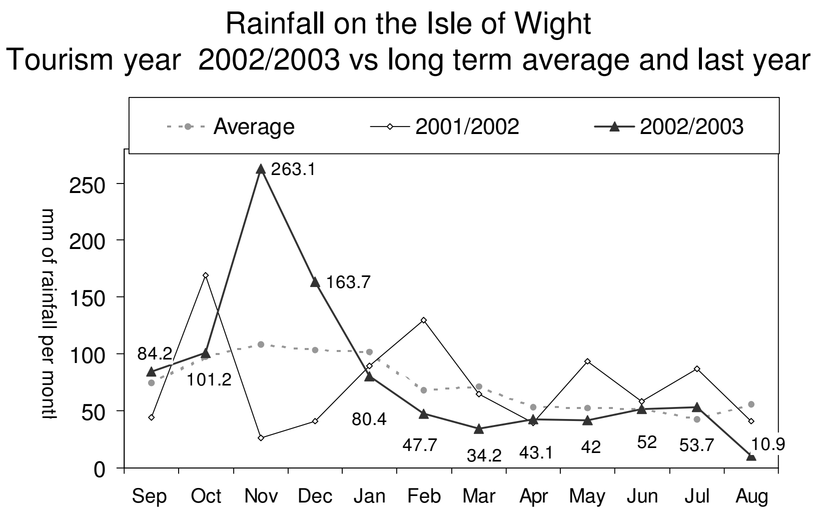
The winter months (January and February) were colder than last year but on a par with the long term average.



3.2 Rainfall

Total rainfall for the year reached 976mm which exceeded both the average and last year by 11%. Wide fluctuations versus the average and last year meant that there were some very dry periods and some extremely wet ones. November and December were exceedingly wet. Rainfall in November was double the average and ten times the level in 2001/2002. This was the wettest since November 1970.

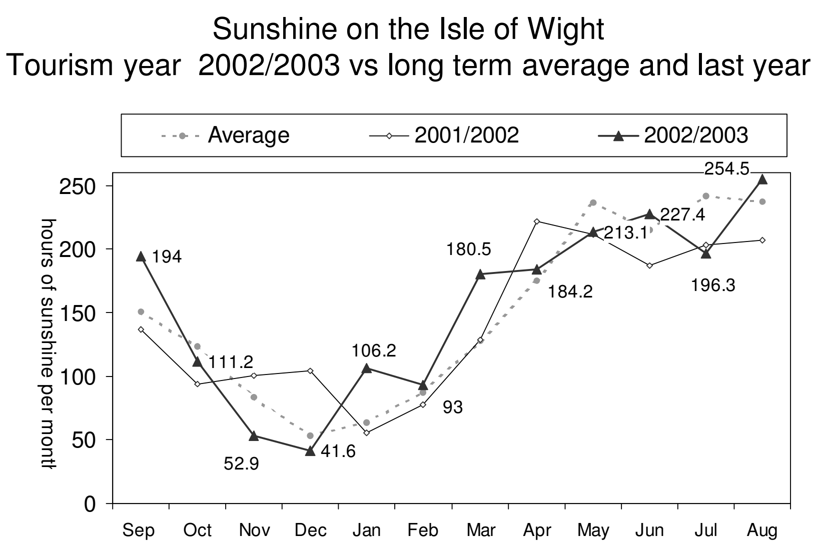
For most of 2003, rainfall has been below or on a par with the average but August was much drier than the average with only 11mm of rain compared with an average for the month of 56mm and 41mm last year.



3.3 Sunshine hours

2002/2003 will probably be remembered for its long hot summer but across the year the Island had 1895 hours of sunshine which is only 3% more sunshine than average and 7% more than 2001/2002. August sunshine did exceed last year by a remarkable 23% and the average by 8% but sunshine in July was well below average.

Sunshine was also well above average in September, January, March and June, but significantly below the average in November, December and April.



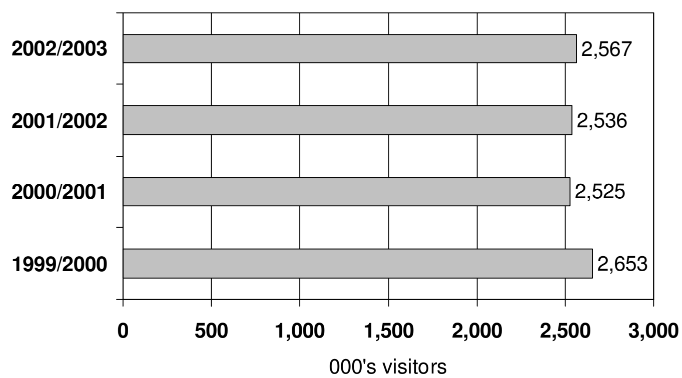
4. Visits to the Isle of Wight

4.1 Estimated visitor numbers

During the 2002/2003 tourism year there were just under 2.6 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.

The number of visits is up slightly (+1.2%) on the previous year which was itself a small increase on 2000/2001 but is a 3.2% decline from the number of visits in 1999/2000. The trend is shown in the chart below.

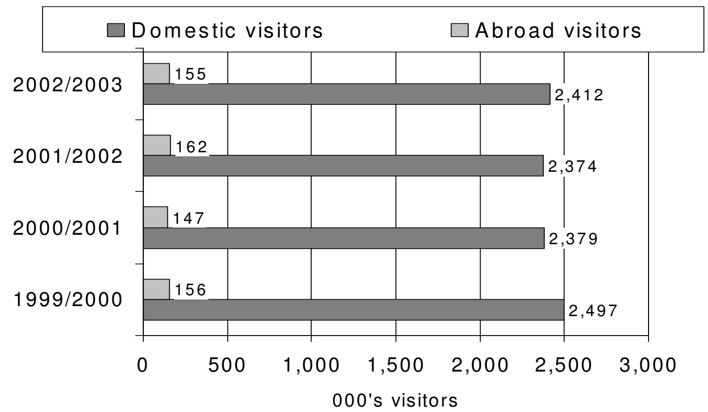
Estimated annual number of total visitors
Tourism year 2002/2003 vs previous years



Visitors are predominately domestic visitors (94%): only a small percentage (6%) travel to the Island from abroad, as shown on the following chart. Visitors from abroad* are estimated to be at a similar level to that seen in 1999/2000, although in the interim they have fluctuated and are below last year. This means that the growth in visitor numbers commented on above has come from an increase in domestic visitors.

*Estimated visitor numbers from abroad are based on small samples which will cause some fluctuation in the numbers.

Estimated annual number of domestic and abroad visitors
Tourism year 2002/2003 vs previous years



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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.

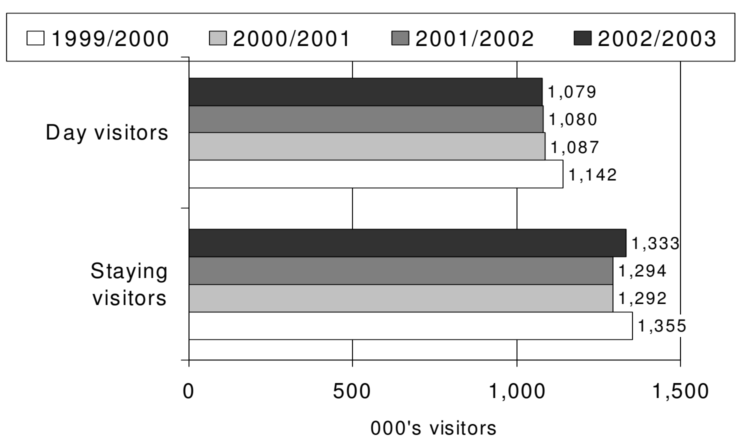
	1999/2000	2000/2001	2001/2002	2002/2003
Day visitors	46%	46%	45%	45%
Staying visitors	54%	54%	55%	55%

The following chart shows the actual number of day and staying domestic visitors over time.

The number of domestic day trip visits has remained fairly constant over the last three years at just over one million visits. However this is down (-6%) on day visits in 1999/2000.

Conversely, staying visits have increased and this year reached 1.33 million domestic staying visits. This is an increase of 3% over the last two years and brings staying visits close to the level seen in 1999/2000. This is good news for Island businesses as these staying visitors contribute more to the Island economy than day visitors.

Estimated annual number of domestic staying and day visitors
Tourism year 2002/2003 vs previous years



4.2.1 Domestic day visits

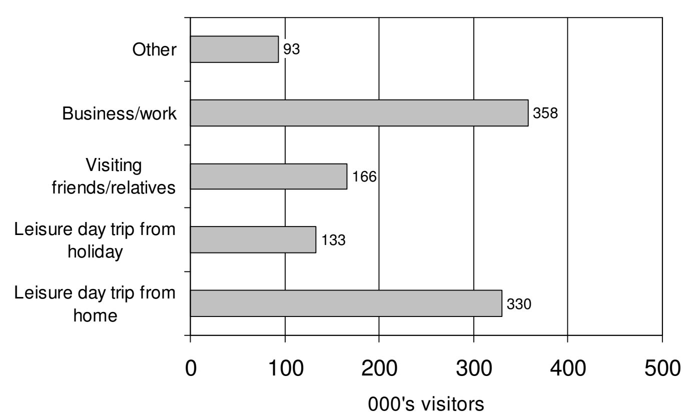
4.2.1.1 Domestic day visitors' type of trip

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

Leisure day trips were the most significant reason for making a day trip to the Island and there were 433,000 of these trips. The majority 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 important reason for visiting the Isle of Wight; this generated 358,000 trips. Day trips to visit friends/ relatives generated 166,000 visits.

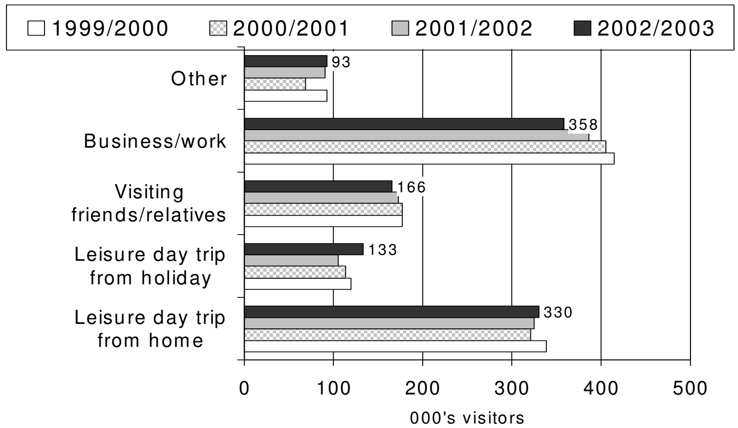
Purpose of day trips amongst domestic visitors
Tourism year 2002/2003



Over the last four years, there has been a small but consistent decline each year in the number of business day trips and there are now 14% fewer than in 1999/2000. Visits to friends and relatives have also declined slightly.

This is shown on the following chart.

Purpose of day trips amongst domestic visitors
Tourism year 2002/2003 vs previous years



4.2.1.2 Profile of domestic day visitors

Group composition reveals a strong bias towards adult only groups of visitors: 87% 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	2002/ 2003	2000/ 2001	2001/ 2002	2002/ 2003
All day visitor groups	86%	85%	87%	14%	15%	13%
Leisure day visitor (from home)	75%	73%	78%	25%	27%	22%
Leisure day visitor (whilst on holiday)	67%	70%	75%	33%	30%	25%
Visiting friends/relatives	80%	80%	82%	20%	20%	18%
Business or business/ leisure combined	99%	99%	99%	1%	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. 2002/2003 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. This is followed by Greater London then Dorset, Surrey and West Sussex. 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	Est'd % of visits 2002/2003
Hampshire	50%	52%	51%	51%
Greater London	7%	6%	8%	6%
Dorset	7%	6%	5%	6%
Surrey	5%	6%	5%	6%
West Sussex	6%	5%	6%	5%
Berkshire	2%	3%	3%	3%
Kent	2%	2%	1%	3%
Wiltshire	2%	2%	3%	2%
East Sussex	3%	2%	2%	2%
Somerset (inc. Bristol)	2%	2%	2%	2%

4.2.2 Domestic staying visits

4.2.2.1 Domestic staying visitors' type of trip

There were 1.33 million domestic staying visits, which is 3% up on 2001/2002 and 2000/2001 and in line with the number in 1999/2000.

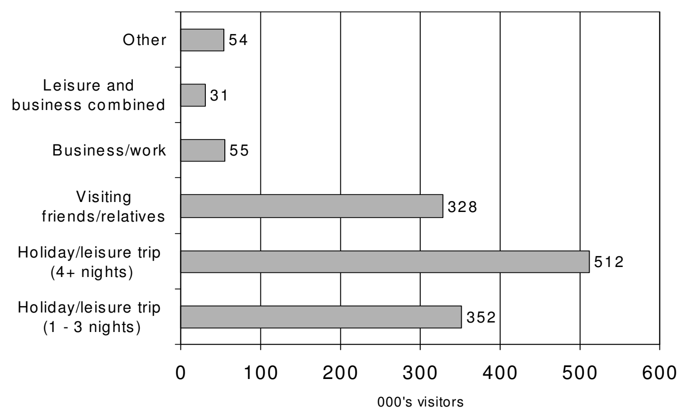
The estimated number of each type of staying trip is shown in the following chart.

Two thirds of all staying trips were for holidays/leisure visits (864,000) and these were by far the most important reason for visiting the Island.

60% of holiday visits (512,000) were holidays lasting 4+ nights; short stays of 1 – 3 nights duration accounted for 352,000 visits.

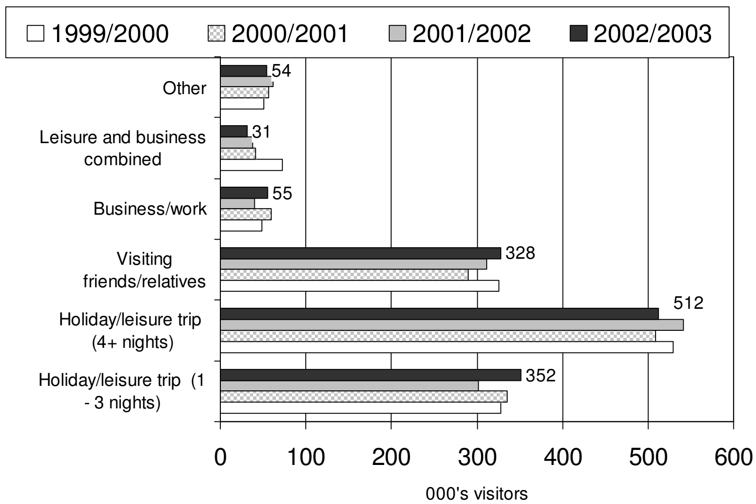
Staying trips to visit friends/relatives were the only other significant reason for visiting, accounting for 328,000 trips. Staying business trips and business trips combined with leisure were at a comparatively low level.

Purpose of staying trips amongst domestic visitors
Tourism year 2002/2003



Comparisons over time are shown below. There has been some change in the relationship between longer holidays (4+ nights) vs shorter holidays (1 – 3 nights). Shorter holidays increased by 50,000, reversing the decline seen last year, whilst long holidays decreased by 30,000 versus last year. Visiting friends and relatives travel has increased each year for the last three years and is now back at the level see in 1999/2000.

Purpose of staying trips amongst domestic visitors
Tourism year 2002/2003 vs previous years



4.2.2.2 Domestic staying visitors' length of stay

The average length of stay was 4.5 nights which is very similar to the last two years, as shown below.

Over the four year period there has been very little change in the estimated length of stay for the different trips. Holidays have remained fairly static, but VFR trips have shortened a little over time. The length of business trips has fluctuated over time.

	Average length (nights)			
Type of domestic trip	1999/ 2000	2000/ 2001	2001/ 2002	2002/ 2003
1 – 3 night holiday	2.2	2.2	2.2	2.3
4+ night holiday	6.9	7.0	7.1	6.9
Visiting friends/relatives	3.6	3.4	3.3	3.3
Business*	3.9	4.9	3.9	3.2
All domestic staying trips	4.8	4.5	4.6	4.5

* 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. Short breaks have increased versus the last two years and are back at the level seen in 1999/2000 but the number of longer holidays (5+ nights) has fallen and is back to 350 thousand, which is also level with 1999/2000.

	1999/ 2000	2000/ 2001	2001/ 2002	2001/ 2002
Length of holiday	000's trips			
1 – 4 night holiday	505	467	474	509
5+ night holiday	352	377	368	350

4.2.2.3 Demand for bednights

The demand for bednights from domestic visitors is estimated at 6 million nights. After allowing for the proportion of these that 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; 72% of bednights in commercial accommodation were needed for those on a longer stay holiday (4+ nights).

Type of trip	Number of bednights domestic (millions)
4+ night holiday	3.5
Short stay (1 – 3 nights)	0.8
Visiting friends/relatives	1.1
Business or leisure & business combined	0.3

An additional 600 thousand bednights were needed for visitors from abroad, of which 400 thousand would have been taken in commercial accommodation.

Demand for bednights (domestic) over time is shown below. There has been little change in the overall demand for commercial accommodation versus the last two years.

Millions of domestic bednights	1999/2000	2000/2001	2001/2002	2002/2003
Estimated bednights in commercial accommodation	5.3	4.8	5.0	4.9

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.

Looking at the different trip types, the only change has been an increase in the proportion of holiday/leisure trips which include children; this has risen from 23% in 2000/2001 to 27% in 2002/2003.

	Adult only groups			Adult and children groups		
	2000/ 2001	2001/ 2002	2002/ 2003	2000/ 2001	2001/ 2002	2002/ 2003
All staying visitor groups	81%	79%	79%	19%	21%	21%
Holiday/leisure trip	77%	74%	73%	23%	26%	27%
Visiting friends/relatives	83%	83%	83%	17%	17%	17%
Business or business/ leisure combined	99%	99%	98%	1%	1%	2%

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.

Once again Hampshire was the most important county, followed by Greater London, Surrey and Kent. This reflects the influence of proximity to the Island's access ports plus the density of population within these counties.

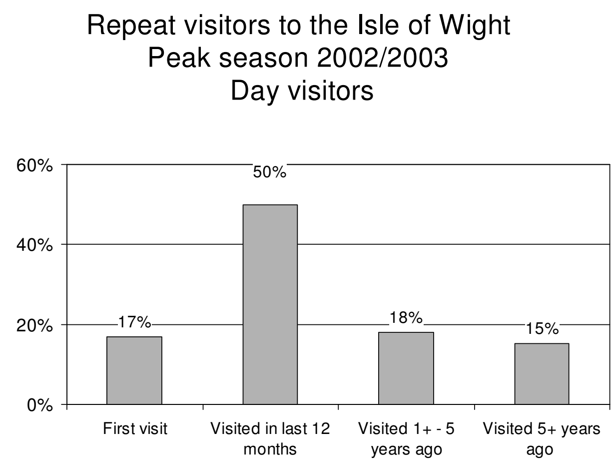
County	Est'd % of visits 1999/2000 000's	Est'd % of visits 2000/2001 000's	Est'd % of visits 2001/2002 000's	Est'd % of visits 2002/2003 000's
Hampshire	16%	15%	13%	15%
Greater London	15%	14%	14%	13%
Surrey	7%	8%	8%	8%
Kent	5%	5%	6%	5%
Essex	4%	4%	4%	5%
Yorks (total)	4%	3%	4%	4%
West Sussex	3%	4%	4%	4%
Herts	3%	3%	3%	3%
Berkshire	3%	3%	3%	3%
East Sussex	2%	3%	3%	3%
Dorset	3%	3%	3%	3%
West Mids.	3%	3%	3%	3%
Wales	2%	2%	2%	3%
Somerset (inc. Bristol)	3%	3%	3%	2%
Lancashire	2%	2%	1%	2%
Nottinghamshire	2%	1%	3%	2%

4.3 Repeat versus first time visitors

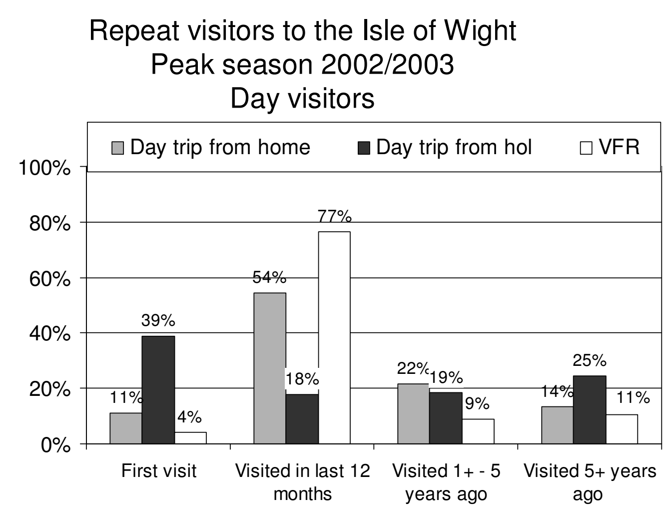
Leisure visitors were asked whether they had visited the Island before and, if they had, when the timing of their last visit. This question was introduced for the peak season, but in future will be included in all seasons.

4.3.1 Day visitors

Only 17% of the leisure day visitors were on their first trip to the Island and the majority of repeat visitors had been before in the last 12 months, as shown below.

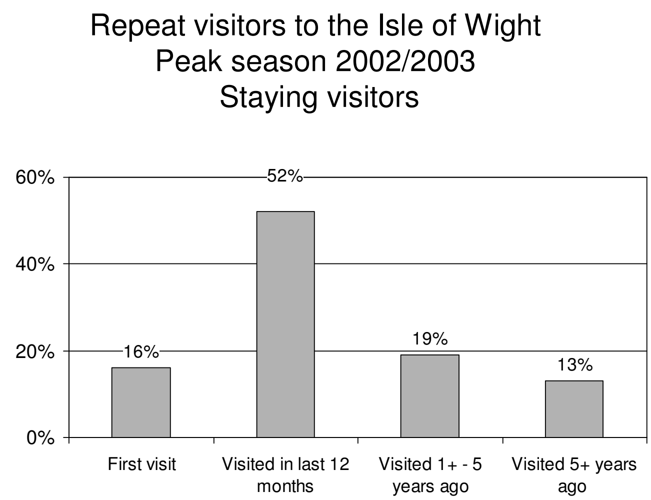


First time day visitors were most likely to be those who were visiting the Island whilst on holiday in the area whereas recent repeat visitors were more likely to be taking a day trip from home or to be visiting friends/relatives. This is shown below.



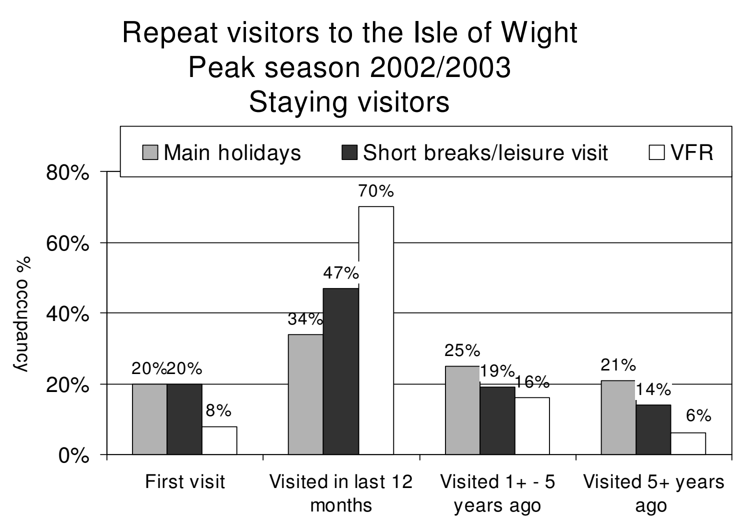
4.3.1 Staying visitors

The percentage of new staying visitors to the Island is in line with new day visitors (16%) and, again, the majority of repeat visitors had been before in the last 12 months, as shown below.



Analysis of staying visitors by visitor type shows that 20% of those on a main holiday or short break were new to the Island leaving 80% of holiday makers who had been before. Such a high proportion of repeat visitors shows a very satisfied customer base.

A third of those on their main holiday and almost a half of those on a short break had been in the previous 12 months which shows an incredibly high proportion of recent repeat visiting and is likely to reflect a high frequency of visiting.



4.4 Purpose of business trips

There were over 450 thousand business trips this year. There is a long term downward trend in the number of business trips. Both domestic and overseas business trips are down in number.

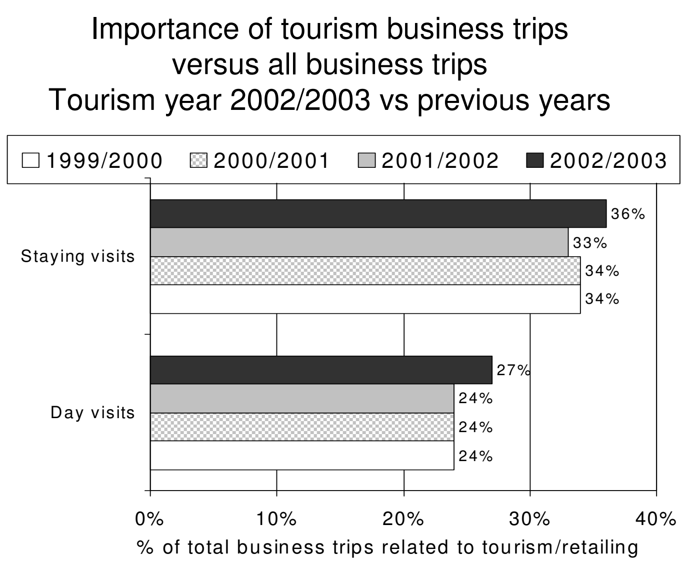
This year business trips were 8% below last year but 20% below 1999/2000.

000's trips	1999/2000	2000/2001	2001/2002	2002/2003
All trips	572	523	496	457
Domestic trips	535	507	464	444
Overseas trips	37	16	32	13

The vast majority (80%) of business travel to the Isle of Wight requires a day trip rather than a staying trip.

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.

Over a quarter of day trips and a third of staying trips were generated by the tourism sector. These proportions have increased slightly versus the last three years.



4.5 Overseas visitors

Visits by people originating overseas reached 155,000 this year. 91,000 of these were staying visits, the remaining 64,000 being day trips to the Island. Leisure day trips, holidays and to visit friends and relatives were the main reasons for visiting the Island. Estimated numbers of each type of trip are detailed below.

	Trips 000's*
Leisure day trip	55
Holiday	32
VFR:	39
• Staying	34
• day trip	5
Business:	13
• Staying	9
• day trip	4

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

The estimated volume of overseas visitors has fluctuated over the last three years.* It is now estimated to be level with 1999/2000.

	1999/2000	2000/2001	2001/2002	2002/2003
Visitors 000's*	156	147	162	155

*N.B. Small sample sizes of overseas visitors can cause fluctuations in data.

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.

Last year the most apparent change was the decreasing importance of visitors from USA following the 9/11 attack, but the estimated proportions from USA and Canada have now doubled. The USA is once again the most important source of overseas visitors. The proportion originating in France has also increased significantly. Other year on year changes are small. This is shown in the following table.

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	Est'd % of visits 2002/2003 000's
USA	18%	14%	10%	19%
France	7%	6%	7%	13%
Germany	9%	7%	14%	9%
Australia	6%	9%	8%	8%
Netherlands	8%	4%	7%	6%
Canada	5%	5%	3%	6%
Spain	3%	2%	5%	5%
Eire	2%	4%	3%	5%
South Africa	5%	4%	7%	3%
Italy	3%	9%	5%	3%
New Zealand	4%	5%	3%	3%
Sweden	5%	1%	2%	3%
Hong Kong	2%	1%	1%	3%
Switzerland	3%	2%	2%	2%
Japan	2%	2%	2%	1%
Austria	1%	4%	2%	*
Norway	1%	1%	1%	*
Denmark	1%	5%	1%	*
Finland	*	*	4%	*

* Less than 1%

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

4.6 The coach market

During the 12 months to the start of September, there were 12,786 coaches travelling to/from the Island (return journeys). This is up only 1.8% versus last year and over the last two years the market has been relatively static.

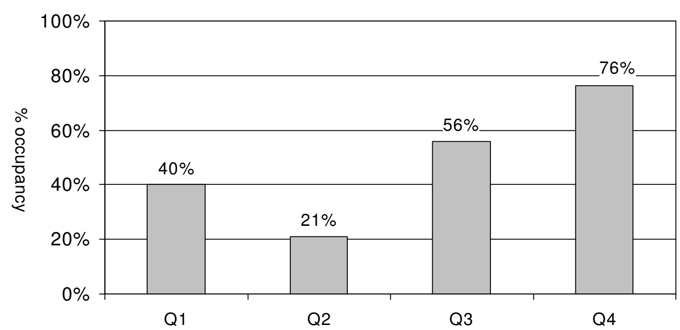
5. Demand for accommodation on the Isle of Wight

5.1 Hotels, guesthouses and Bed & Breakfast occupancy

5.1.1 Bedspace occupancy

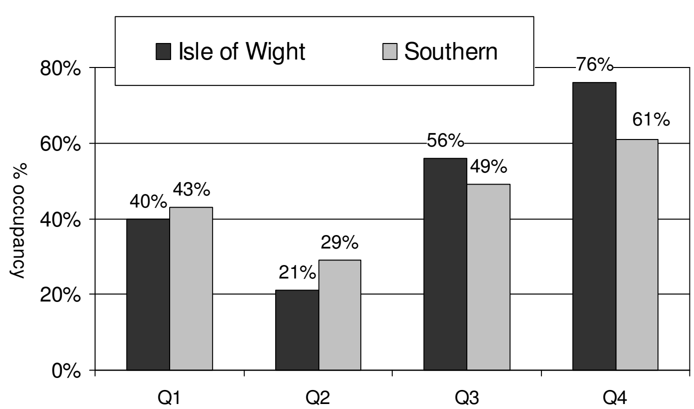
Bedspace occupancy levels across all types of catered accommodation is shown below. This ranged from a low of 21% in the spring (Q2) up to 76% in the peak (Q4).

Isle of Wight hotels/guesthouses/B&B's
Bedspace occupancy 2002/2003



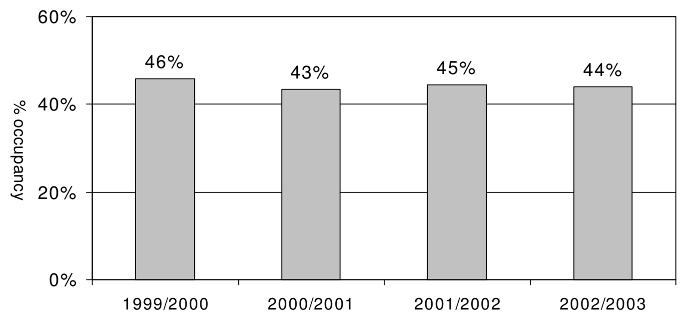
The Isle of Wight exceeded bed occupancy for the whole Southern region in the spring and peak periods (Q3 and Q4). Performance in the peak period was 15 points above the Southern region. In the first and second quarters, periods when cities and towns are more popular destinations, bed occupancy fell slightly below the Southern region average.

Isle of Wight hotels/guesthouses/B&B's
Bedspace occupancy 2002/2003
Isle of Wight vs Southern region



Across the whole year, the average bedspace occupancy was 44%, which is on a par with previous years, as shown below.

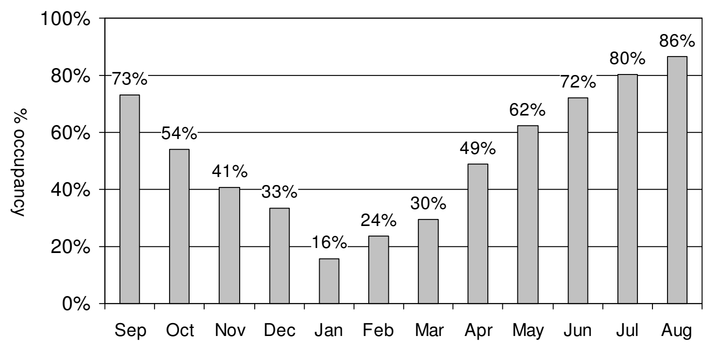
Isle of Wight hotels/guesthouses/B&B's
Bed space occupancy 2002/2003 vs previous years



5.1.2 Room occupancy

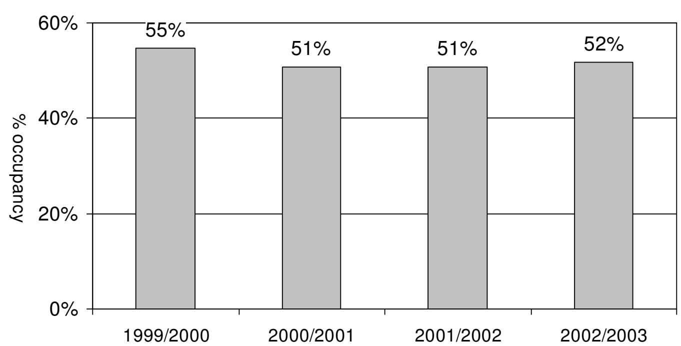
Room occupancy ranged from a low point in January of 16% up to a high of 86% in August. June, July and September were also months of high occupancy levels.

Isle of Wight hotels/guesthouses/B&B's
Room occupancy in 2002/2003



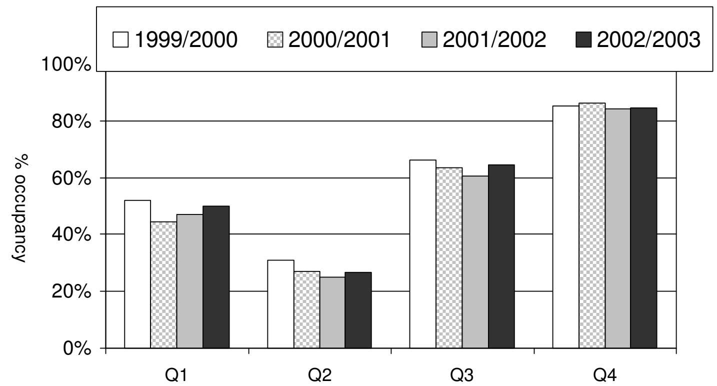
The average room occupancy across the year was 52% which is slightly higher than last year but down a little from 55% in 1999/2000, as detailed on the following chart.

Isle of Wight hotels/guesthouses/B&B's
Room occupancy 2002/2003 vs previous years



The next chart shows the trend by quarter over time and illustrates how room occupancy has increased very slightly in quarters 1 to 3 versus last year and is on a level with last year in the fourth (peak) quarter.

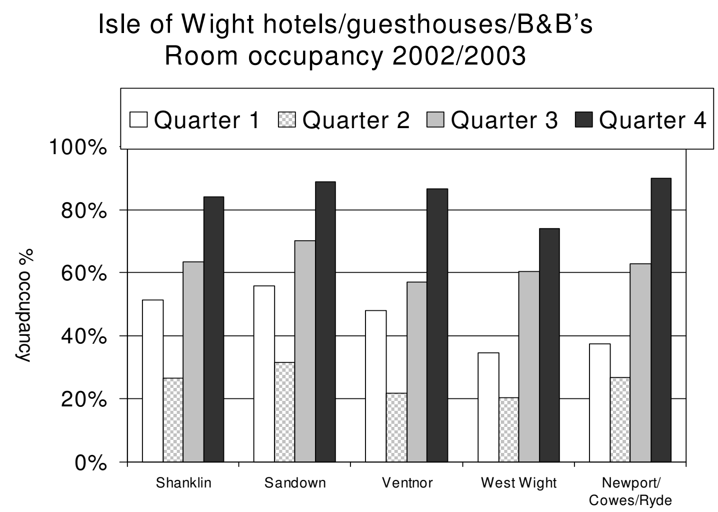
Isle of Wight hotels/guesthouses/B&B's
Room occupancy 2002/2003 vs previous years



Room occupancy varied between different types of establishment. In line with previous years, 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	31%	27%	44%	61%
Quarter 2	24%	17%	27%	40%
Quarter 3	49%	50%	59%	74%
Quarter 4	75%	77%	80%	90%

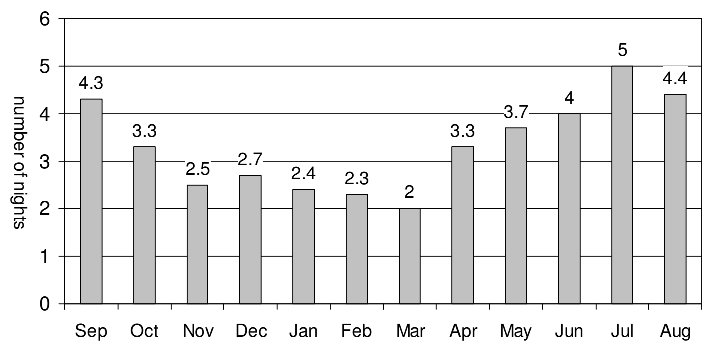
There were some variations in room occupancy between areas although these were not as pronounced as the differences by size of establishment.



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 stay between 2 and 2.7 between November and March. Length of stay then gradually lengthens through the spring up to a maximum of 5 nights recorded in July. This exceeded August when 4.4 nights was the average length of stay which may reflect many people trying to take advantage of the hot, sunny weather and travelling to the Island for last minute short breaks.

Isle of Wight hotels/guesthouses/B&B's
Length of stay in 2002/2003



Average length of stay varied considerably according to the size of establishment. The largest hotels (26+ rooms) consistently attracted longer stay visitors, regardless of the time of year. This contributed to the higher occupancy rates in these establishments noted earlier. Conversely the smallest establishments tended to serve the short break market with autumn and winter stays averaging less than 2 nights and spring/summer stays less than 3 nights. This is shown below.

Average no of nights	1 – 3 rooms	4 – 10 rooms	11 – 25 rooms	26+ rooms
Quarter 1	1.9	3.3	3.2	3.6
Quarter 2	1.6	2.5	2.4	3.4
Quarter 3	2.6	3.7	3.9	4.3
Quarter 4	2.3	5.2	4.6	5.4

Looking at length of stay over time, shown below, this has been fluctuating somewhat:

5 in the peak period (Q4) length of stay was level with last year at 4.9 nights but that was down from 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 in the peak season

6 in spring (Q3) increased up to 4.0 nights bringing it back to the level seen in 1999/2000

7 in winter (Q2) length of stay dropped to its lowest level seen (2.5 nights)

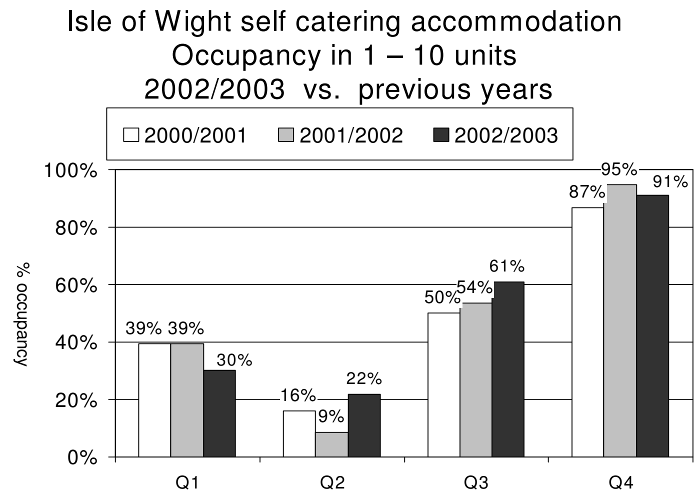
8 last autumn (Q1) length of stay remained unchanged versus the last two years.

Average no of nights	1999/2000	2000/2001	2001/2002	2002/2003
Quarter 1	3.6	3.4	3.4	3.4
Quarter 2	3.0	2.8	2.7	2.5
Quarter 3	4.0	3.8	3.7	4.0
Quarter 4	5.9	5.3	4.9	4.9

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

Occupancy in self catering units ranged from 22% in the winter (Q2) to a high of 91% in the peak (Q4) season. Occupancy in this sector peaked at 94% during August.

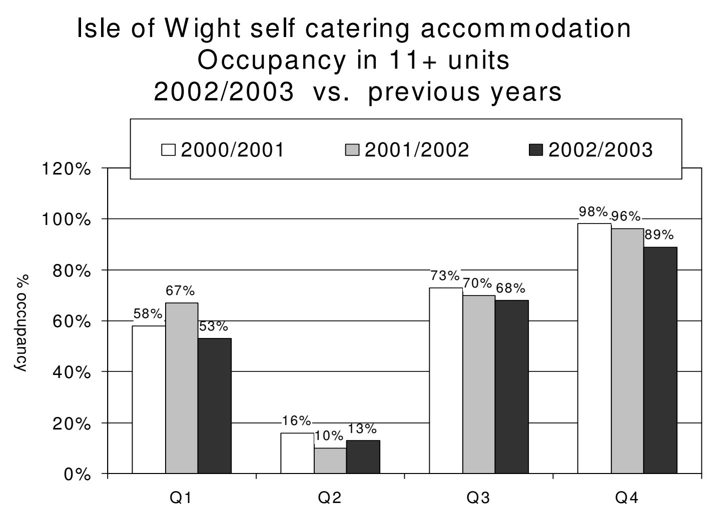
Occupancy exceeded previous years in the winter (Q2) spring (Q3) but was below in autumn (Q1). In the peak season occupancy was 4 points below last year but up 4 points on the year before.



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

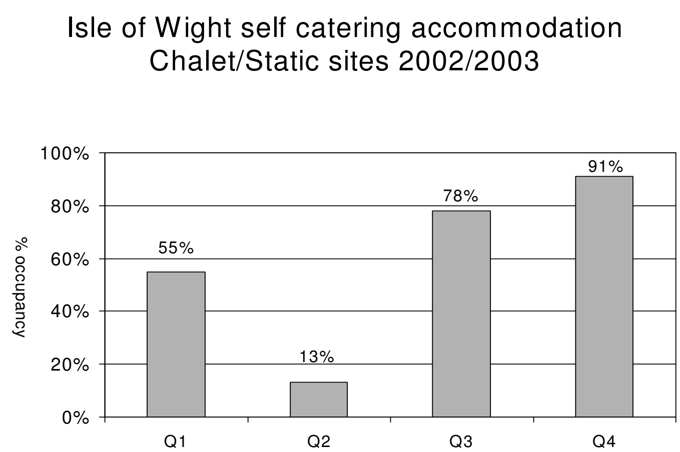
Occupancy in this sector ranged from 13% in winter to 89% in the peak season.

Performance in this sector was below previous years for most of the time. This was particularly evident during the autumn (Q1) and peak (Q4) periods.

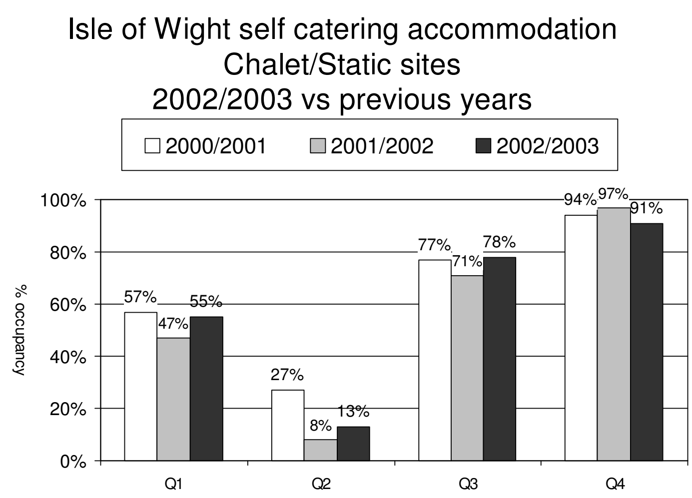


5.4 Static sites

Occupancy on static chalet sites ranged from 13% in winter (Q2) to a high of 91% in the peak (Q4); in the month of August this reached 95%. Spring was a good trading period (Q3) with occupancy reaching 78%.

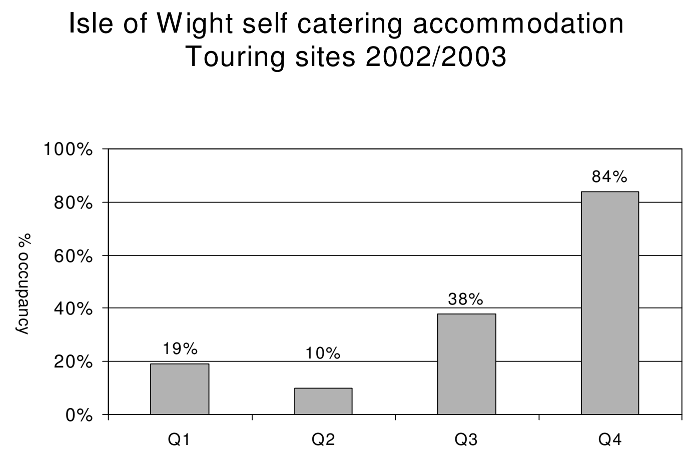


Comparisons with last year show improvements except during the peak season (Q4) when occupancy fell by 6 points. Spring (Q3) was up by 7 points versus last year which brought occupancy back to the level seen in 2000/2001. Likewise in the autumn (Q1), occupancy increased by 8 points and returned near to 2000/2001 levels. Winter (Q2) was up on last year but remained significantly below 2000/2001.

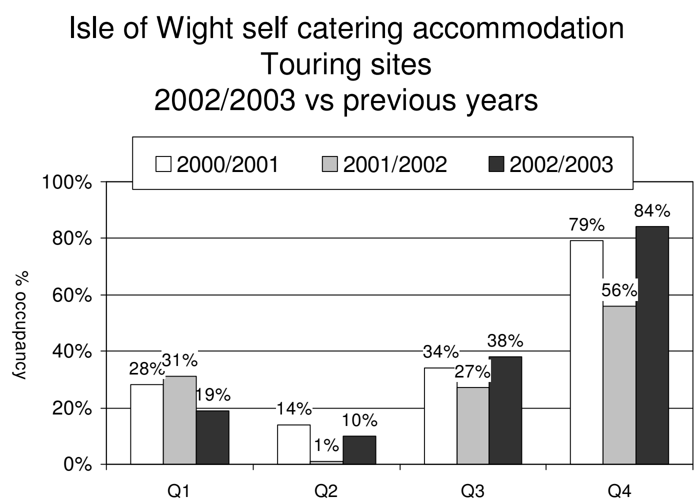


5.5 Camping/touring sites

There were between 6 and 8 sites responding in the survey so results must be taken as a guide. Generally this was a good year for touring sites, obviously helped by the peak season weather. During the peak (Q4) pitch occupancy reached a high of 84%. Spring was a good period also with occupancy at 38%.



Pitch occupancy exceeded the previous two years during spring (Q3) and the peak (Q4), it was well up on last year and up slightly on 2000/2001. There was a fall in occupancy in autumn (Q1) which is primarily the month of September as most sites closed for the winter after this month.



6. Value of tourism

The monetary value of tourism on the Isle of Wight is estimated to be around £324 million for the tourism year 2002/2003.

Staying trips generated the majority of this (89%). These are estimated to be worth £289 million. Domestic staying trips contributed £258 million.

It is estimated that day trips add another £35 million to the value of tourism. Almost 95% of this is from domestic day trips.

	£Millions
Staying trips	
All domestic staying trips	£258
All overseas staying trips	£31
All staying trips	£289
Day trips	
All day trips (domestic and overseas)	£35

It is estimated that the value of tourism has increased by almost 4% since 2001/2002. This is partly due to inflation but the increase in the total number of visits to the Island and the mix of type of visits have contributed to the increase in the value of tourism.

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.

Almost half (47%) of all leisure visitors visited an attraction (free and/or with admission fee).

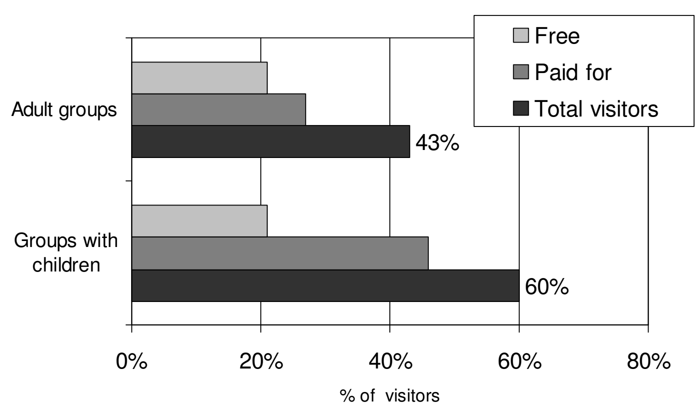
Visits by staying visitors to both free and paid for attractions were well above that for day trippers.

	Day visitors	Staying visitors
Visit to any attraction	32%	56%
Visit a free attraction	16%	24%
Visit a paid for attraction	17%	39%

Presence of children in the party has a strong positive effect on likelihood to visit attractions. 60% of groups with children visited an attraction versus 43% of adult only groups. It is the paid for attractions which are much more likely to be visited by those with children: 46% of those with children went to a paid for attraction compared to 27% of adult only groups. Visits to free attractions were at the same level for both groups of visitors.

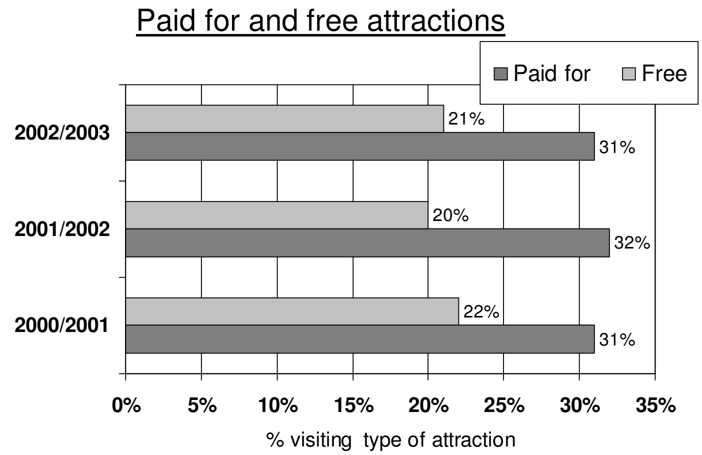
Estimated visits to attractions
Tourism year 2002/2003

Groups with children vs adult groups



Total visits to attractions are up slightly versus the last two years; 47% visited this year versus 42% last year and 41% the previous year. Paid for attractions continue to attract more visitors than the free attractions, but visitor levels to each type have remained similar, as shown below. (This is due to fewer visitors reporting that they went to both free and paid for attractions than in previous years.)

Estimated visits to attractions
Tourism year 2002/2003 vs previous years



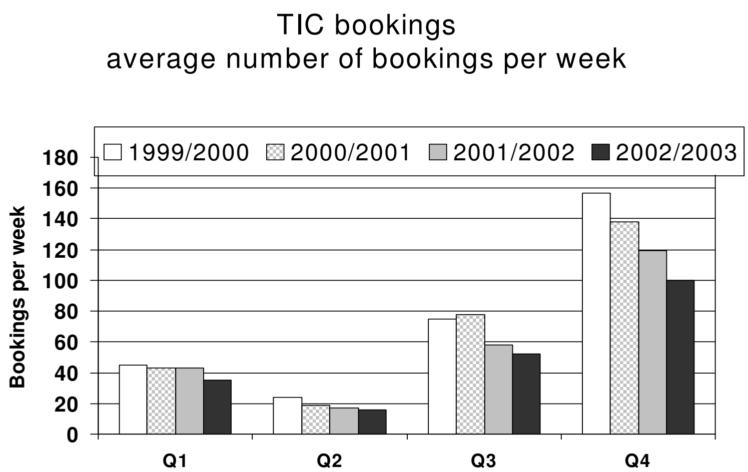
8. Isle of Wight Tourism activity levels

8.1 Tourist Information Centres and Hotline

Island Tourist Information Centres had a busy year. The number of visitors calling at the seven Island Tourist Information Centres exceeded 400,000 in the year, which is 6% more than last year but about 10% down on 1999/2000.

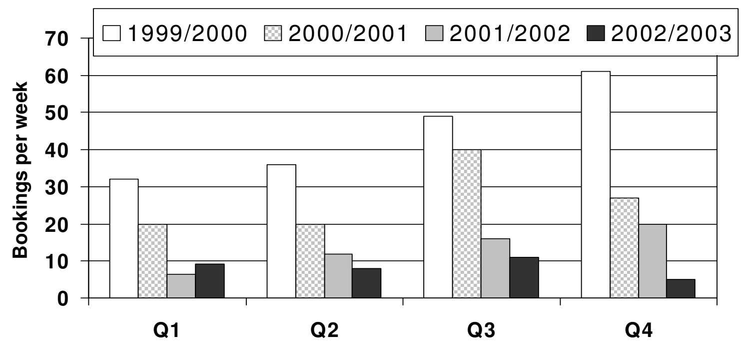
The number of bookings being made has continued to decline showing that the centres are performing an information function rather than focusing on bookings.

The chart below shows the average number of bookings per week made by visitors to the centres in each quarter over time. This illustrates the decline in bookings over time, which is particularly apparent in the peak season.



The Hotline operates alongside the TIC's although a smaller proportion of bookings are made via the Hotline. The launch of a new website which shows special offers and late availability has encouraged more people to book direct. Consequently bookings via the Hotline have declined quite dramatically over time, as shown on the chart.

Hotline bookings
average number of bookings per week



8.2 Website visits

There were 493,000 visits to the Isle of Wight Tourism website www.islandbreaks.co.uk during the year to end of August 2003. This is 16% down on the previous 12 months but this decrease is not surprising as the website has not been developed during this period. Most importantly it still does not have the capacity to take on line bookings. This is an important area for future development if the website is to continue to attract and satisfy visitors as it is believed to be a key growth area for use of travel websites.

8.3 Brochure requests

134,370 brochures were mailed out during the year to August 2003 which is 20% less than in the previous year. This continues the long term downward trend in the volume of brochure requests, as more people use the internet to search for holiday information and to make their bookings.

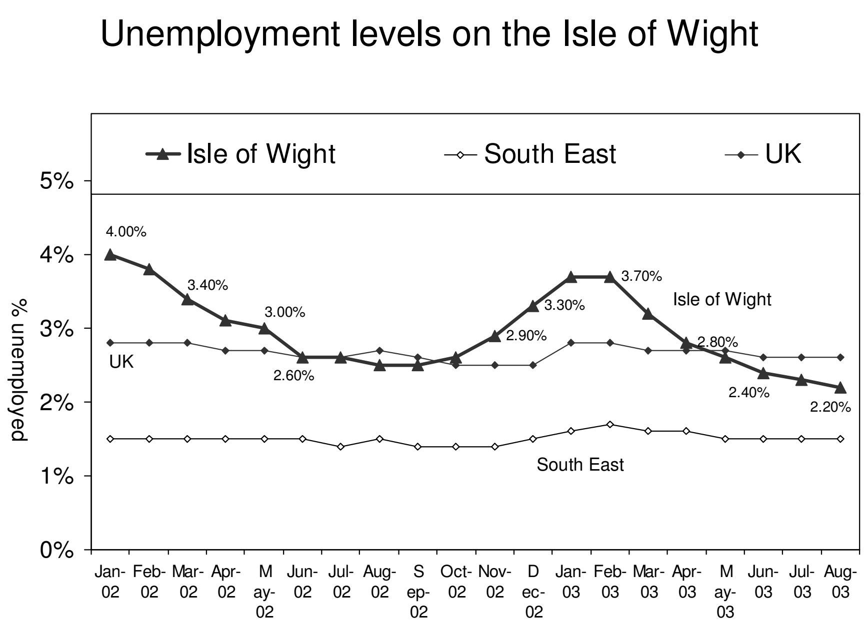
9. Unemployment levels on the Isle of Wight

The long term trend in claimant unemployment on the Isle of Wight, the South East and the UK is shown on the following chart*.

In January 2002 unemployment on the Island was 4.0% but, in line with the UK, this has fallen considerably over time.

Unemployment on the Island does follow a cyclical pattern through the year with the highest levels recorded in the winter months when the tourism industry is at its quietest and the lowest levels in the peak season. This reflects the importance of the tourist industry in creating employment on the Island.

At the start of this tourism year, September 2002, claimant unemployment was 2.5%. It rose to a high of 3.7% in January and February, then reduced down to 2.2% in August 2003. This is the lowest level recorded on the Island and is well below the national average of 2.6% in August 2003.



* The method of calculating unemployment has changed hence this data replaces data included in the year end report for 2001/2002