Isle of Wight Tourism
Activity monitor

Tourism year
2005/2006

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 2005/2006 are:

- first quarter: post summer peak to end of calendar year: 5/9/2005 - 31/12/2005
- second quarter: January to two weeks before Easter: 1/1/2006 – 26/3/2006
- third quarter: two weeks before Easter to the summer peak: 27/3/2006-16/7/2006
- fourth quarter: the summer peak season : 17/7/2006 - 3/9/2006.

Contents

1. Introduction and overview

This report provides commentary on the Isle of Wight tourist industry for the period from 5th September 2005 to 3rd September 2006. Comparisons are made with previous years.

Key influences on tourism across the last year have included:

- The World Cup football tournament in June/July, which focused attention on Germany from across the world. Many additional trips were made to Germany but it was the TV coverage of the event which had a tremendous effect on domestic tourism, as people planned leisure time around the football fixtures.

- The thwarted terrorist attack on UK airports in August, which brought international travel to a halt in the middle of the peak holiday season. This also reminded the international and domestic market of the London bombings in July 2005 and the on-going threat of terrorism: this will have contributed to the small fall in transatlantic travel. Long delays to international flights and inconvenience continued for some time. Extended check-in times plus restrictions on baggage remain a problem now and it remains to be seen whether transatlantic tourism, or indeed air travel, will continue to be affected and whether this will have a beneficial effect on domestic tourism.

When looking back over the previous 5 years, events which have affected tourism include the Asian Tsunami in December 2004, war in Iraq, the Madrid bombs in spring 2004, the outbreak of SARS in Asia in late 2002, the 9/11 attack in New York in 2001; the foot and mouth outbreak which halted travel to the British countryside in spring 2001.

International Passenger Survey* data for the 12 months to August 2006 reveals that overseas residents trips to the UK rose by 5% to 31 million visits. Almost two thirds of these were Western Europeans. Visits by North Americans increased by 4% to 4.4 million but visits from other parts of the world rose by 10% to reach 6.8 million visits.

The same survey shows visits abroad made by UK residents: these rose by 3% (12 months to August 2006) to reach 68 million. Again the majority of trips (75%) were to Western Europe. The low cost airlines continue to thrive and expand, serving primarily European destinations: their offers of low fares fuel the growth in additional short breaks abroad. High advertising spend by these operators, focussing on the lowest fares, make domestic short breaks appear comparatively expensive. Travel to North America (12 months to August 2006) decreased by 6% but travel to other areas grew by 13% to over 12 million trips.

Through the year the economy has been stable with low unemployment, low inflation and low interest rates. Towards the end of the year (August) the Base Rate was raised for the first time since August 2005.

Turning to the Isle of Wight, a long list of events, small and large, are scheduled throughout the year to attract visitors. The main ones, which are now well established events, include Bestival in September, Wight Air in October, the Walking Festival in May, the very successful Nokia Music Festival in June and Cowes Week in August. Last year the Island also benefited from the Trafalgar 200 celebration, a significant one off event, which was well attended and could not be rep laced this year.

* 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.

During the tourism year of 2005/2006 that there were over one million holidays (short breaks and holidays combined) on the Isle of Wight. The important short breaks (1 – 4 nights) segment reached 680,000 visits (domestic and overseas residents combined), which is in line with last year but a significant increase on 2003/04. Together with other staying visits the tourism revenue generated by staying trips is estimated to be just under £340 million.

Day trips declined significantly but still contributed another £32 million to the local economy taking overall tourism revenue to £371 million.

2. Summary of key points in 2005/2006 tourism year

- 663,000 domestic short breaks (1 – 4 nights) were taken on the Isle of Wight. This is more or less level with last year but up by 24% versus 2003/2004. Over the longer term, domestic short breaks have increased by over 40%.
- There were 348,000 domestic longer holidays (5+ nights) taken, which is a slight decline on last year (-4%) due to the reduction in these holidays during the spring quarter. During this quarter there was also a significant decline in coach passengers, who make up an important part of the holiday market in the spring period. Longer stay holidays remained 12% up on 2003/04.
- Staying business visits declined by 18% versus last year. Other types of business trips also declined taking the total business sector down by 22%.
- The demand for bednights in commercial accommodation is estimated at 5 million bednights. Despite the declines mentioned above, this is just 2% below last year. This was helped by a slight lengthening of short breaks.
- Day visits declined significantly (-14% in volume and value). This fall is attributable to a decline in domestic leisure day visits and a decline in business trips, noted above.
- It is estimated that the Island attracted 480,000 new or lapsed visitors. These were primarily the higher value staying visitors - 340,000; in addition there were 140,000 day visitors.
- Visits by overseas residents fell by 16% due to a fall in business visitors, holidaymakers and leisure day visitors.
- Just over 400,000 people visited the Tourist Information Centres; this is a decrease of 13% versus last year. This downturn was accompanied by an increase in the average spend – up to £8.90. Visits to islandbreaks.co.uk increased dramatically (+32%) in line with the national and international trend towards using the internet to research destinations and to make bookings. This significant increase is ahead of the estimated increase for Europe for on-line holiday sales (+25%).*
- 42% of leisure visitors went an attraction, free or with an entrance fee: 13% went to a free attraction and 30% to a paid for attraction. Both these were slightly below last year. The spring period saw a steep decline in visits to paid for attractions, reflecting the influence of the World Cup. New and lapsed leisure visitors to the Island are much more likely to visit an attraction (67% and 65% respectively) whereas only 30% of regular leisure visitors did so.

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

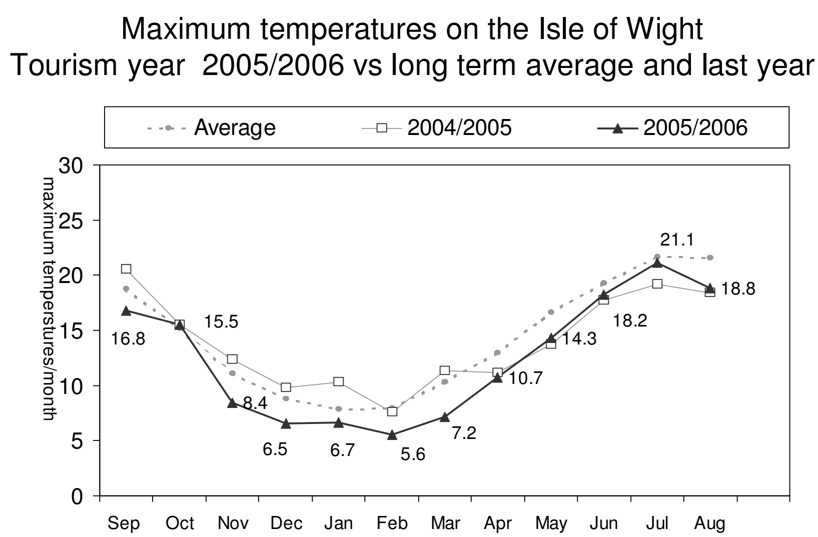
3. Weather on the Isle of Wight

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 last year and the long term average.

3.1 Maximum temperatures

For much of this year maximum temperatures were slightly below the long term average. October and July were the only exceptions. In addition, for the period from November through to March it was a little cooler than last year. From April to June and in August temperatures were in line with last year but rose above during July.

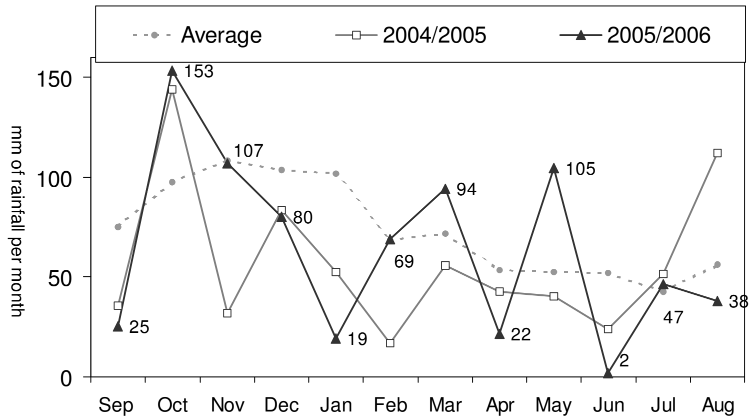


3.2 Rainfall

In line with the UK, the Island had below average rainfall. Across the year this reached 760 mm, which was 14% below the average. However there were some very wet periods, notably October, March and May.

There were more very dry periods, namely September, January, April, June and August.

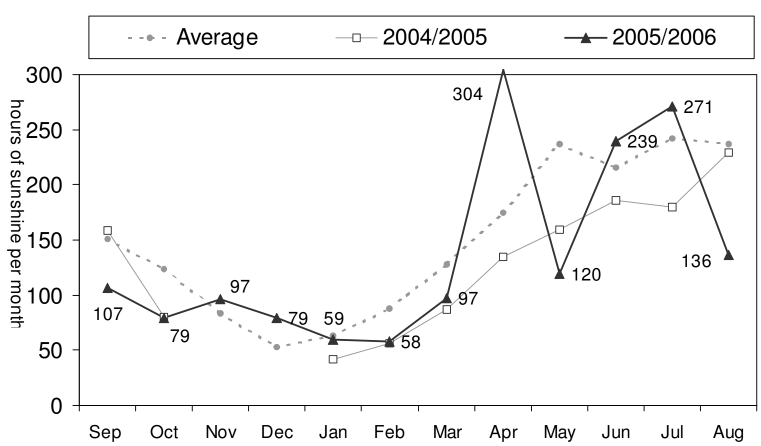
Rainfall on the Isle of Wight
Tourism year 2005/2006 vs long term average and last year



3.3 Sunshine hours

From September through to March sunshine hours 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. The Island also enjoyed sunny weather in June and July but August was particularly dull, even though it was not very wet.

Sunshine on the Isle of Wight
Tourism year 2005/2006 vs long term average and last year



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

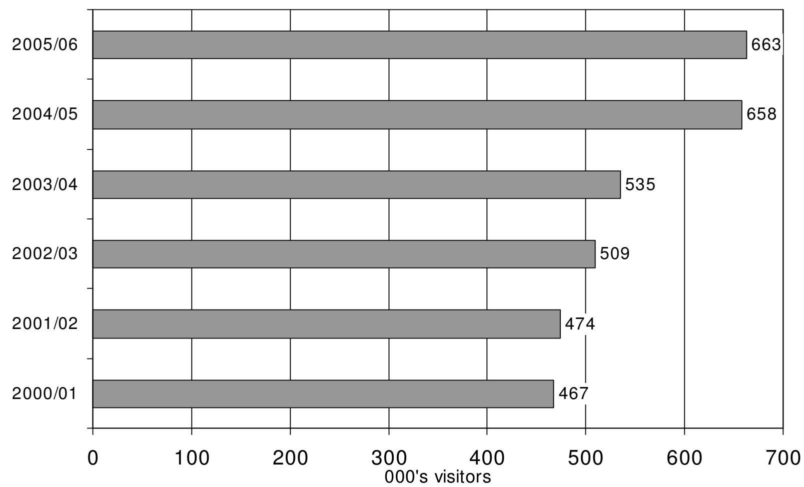
4. Visits to the Isle of Wight by domestic residents

4.1 Estimated number of short break leisure visitors

This important visitor segment, leisure visitors staying for 1 – 4 nights on the Island, has expanded dramatically over the last 6 years. In 2000/01 there were an estimated 463,000 short breaks but growth in excess of 40% has taken this to over 660,000 short breaks this year.

The volume seen this year is more or less in line with 2004/05 but up significantly on 2003/04 (+24%).

Estimated number of domestic short break leisure visitors
1 – 4 nights
Tourism year 2005/2006 vs previous years



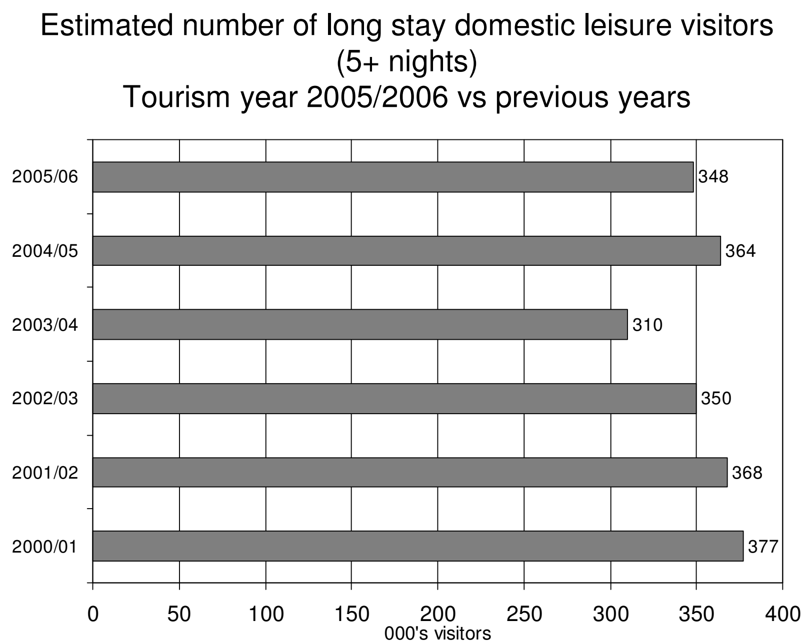
Short stay holidays can also be analysed as 1 - 3 nights in duration, which is the definition more normally used within tourism analysis. 1 - 4 nights is used on the Isle of Wight to reflect the Island location and the structure of the ferry tickets available. On the 1 – 3 night basis, the trend over time has also been upwards in terms of the number of short breaks.

000's trips	2000/ 2001	2001/ 2002	2002/ 2003	2003/ 2004	2004/ 2005	2005/ 2006
1 – 3 nights	335	301	352	347	395	404

4.2 Estimated number of longer stay leisure visitors

Leisure visitors who stay for 5 or more nights are another important segment, bringing significant tourism revenue to the Isle of Wight economy.

This market has fluctuated over the 6 year period, illustrated below. In 2000/01 there were 377,000 but this declined each year up to 2003/04. The downward trend was turned around in 2004/05 when there was a significant increase. This year saw a small decline on the high point last year (-4%) but there remains 12% more longer holidays than in 2003/04.



To pair with 1-3 night short breaks, long stay holidays taken can also be analysed as 4+ nights. The long term trend is upwards but there have been some downturns over the years. The number this year is below last year but significantly ahead of 2000/2001 (+19%), as illustrated below.

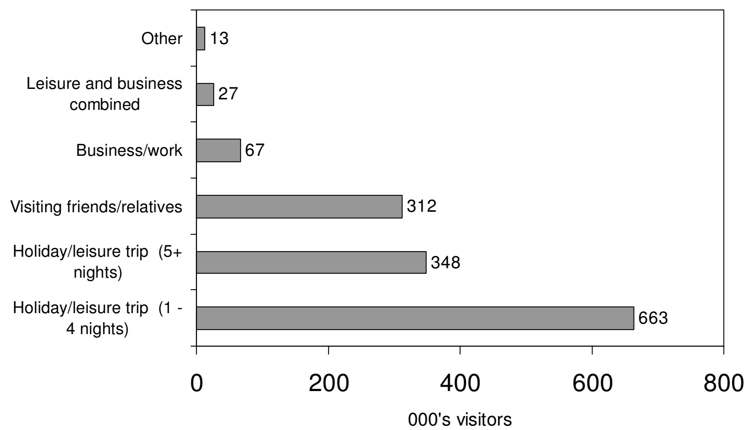
000's trips	2000/ 2001	2001/ 2002	2002/ 2003	2003/ 2004	2004/ 2005	2005/ 2006
4+ nights	509	541	512	509	623	606

4.3 Estimated number of other staying visitors

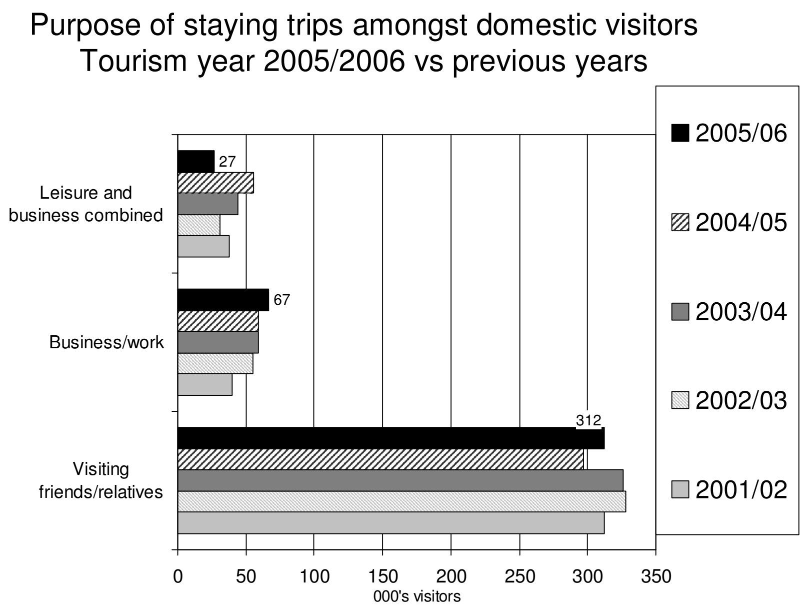
In addition to over one million leisure visitors on short breaks and longer holidays, there were 420,000 other visitors, the most important sub group of whom were those visiting friends and/or relatives: over 310,000 such visits were made. These are illustrated below (short breaks and holidays are also illustrated to show the relative importance of each type of trip).

Just under 100,000 business trips or combined business/leisure trips were made plus another 13,000 trips 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 2005/2006



Looking at the changes over time: VFR trips are up on last year and are again level with 2001/02 but in the interim period have risen above this level. Business trips, at 94,000, are up significantly on 2001/02 (+20%) but are below the high point seen last year (-18%).



4.4 Average length of stay

The average length of stay was 4.2 nights, which is level with last year but down slightly on earlier years, as shown below.

The shorter overall trip length is due primarily to the reduction in the length of longer (4+ nights) holidays/leisure trips. This was at a high of 8.2 nights in 2003/2004 but shortened to 7.6 nights last year and this year.

There has been a very small increase in the length of short breaks; over the six year period these have lengthened from 2.7 nights to 3.0 nights.

Business trips have shortened but there are relatively few of these, hence they do not change the overall average a great deal. VFR trips have fluctuated in the length over time.

	Average length (nights)					
Type of domestic trip	2000/ 2001	2001/ 2002	2002/ 2003	2003/ 2004	2004/ 2005	2005/ 2006
Short breaks: 1 - 4 nights	2.7	2.8	2.8	2.9	2.9	3.0
Longer holiday: 5+ nights	7.8	8.1	8.0	8.2	7.6	7.6
Visiting friends/relatives	3.4	3.3	3.3	3.5	3.1	3.3
Business*	4.9	3.9	3.2	3.2	3.8	3.9
All domestic staying trips	4.5	4.6	4.5	4.4	4.2	4.2

* Caution: small base size

4.5 Demand for bednights

The demand for bednights from domestic visitors is estimated at just over 6 million nights, however a significant proportion of these would not be taken in commercial accommodation (i.e. trips to visit friends and relatives). After allowing for this, the demand for bednights in commercial accommodation arising from domestic visitors was almost 5 million bednights.

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

This illustrates clearly the importance of holidays for accommodation providers. 91% of the estimated demand for bednights arises from those on short stays and longer holidays. Those on longer holidays (5+ nights) required an estimated 2.6 million bednights and short breaks (1-4 nights) required another two million bednights.

Type of trip	Number of domestic bednights (millions)
5+ night holiday	2.6
Short stay (1 – 4 nights)	2.0
Visiting friends/relatives	1.0
Business or leisure & business combined	0.4

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

Millions of domestic bednights	2000/ 2001	2001/ 2002	2002/ 2003	2003/ 2004	2004/ 2005	2005/ 2006
Estimated bednights in commercial accommodation	4.8	5.0	4.9	5.0	5.2	5.0

4.6 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. It also brings new types of accommodation into the research, for example yachts and second homes which are not included in the occupancy survey.

The majority (93%) of those visiting friends/relatives stay with their host family. The accommodation used by those on holidays/short breaks and those on business trips (business only and business/leisure combined) is detailed overleaf.

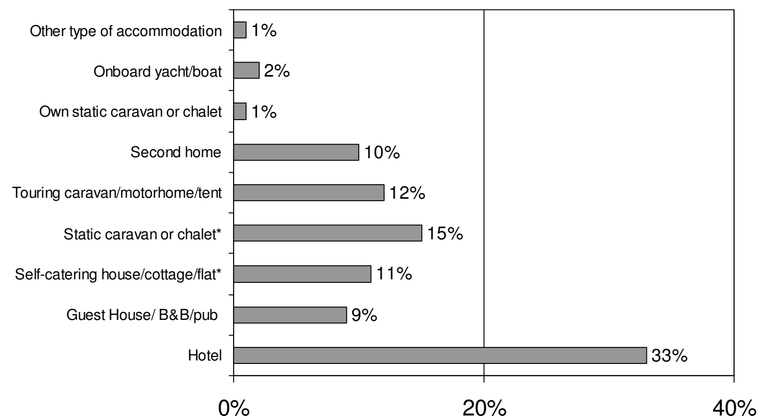
4.6.1 Visitors on long holidays/short breaks

Those on short breaks/longer holidays were most likely to stay in a hotel (33%). An additional 9% went to a guesthouse.

Self catering options were used by over half of these visitors with static caravans/chalets the most popular type, very closely followed by 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.

Type of accommodation used
by visitors on short breaks and holidays: 2005/2006



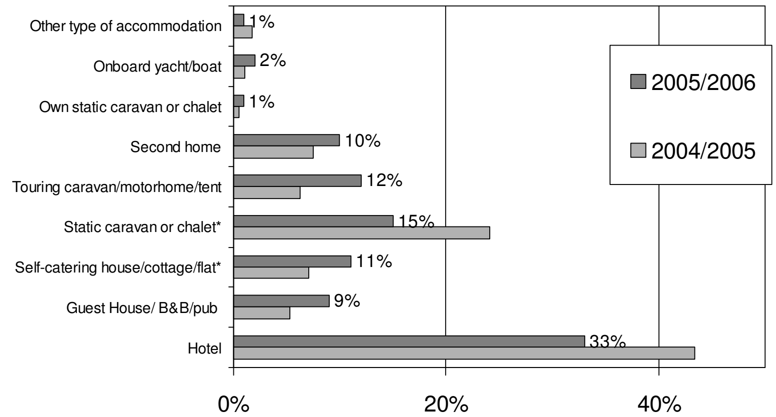
* Rented accommodation

Use of hotels is higher amongst adult only groups than those with children; self catering options are more frequently chosen by families.

There are a few significant changes versus last year (illustrated overleaf):

- Use of hotels and static caravans/chalets declined quite dramatically.
- Significant increases were seen in the use of guesthouses, self catering houses/flats, touring sites and second homes.

Type of accommodation used
by visitors on short breaks and holidays: 2005/06 vs 2004/05



* Rented accommodation

4.6.2 Visitors on business/combined business & leisure trips

Over half the business visitors used hotels or guesthouses, in addition there was a range of other accommodation used including rented houses/cottages/flats (9%), homes of friends/relatives (10%) and second homes (8%).

4.6.3 Length of stay in different accommodation

The Occupancy Survey covers use of serviced accommodation and certain self catering accommodation but this 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. Combining the type of accommodation used with the length of stay provides information on the varying lengths of stay in different types of accommodation.

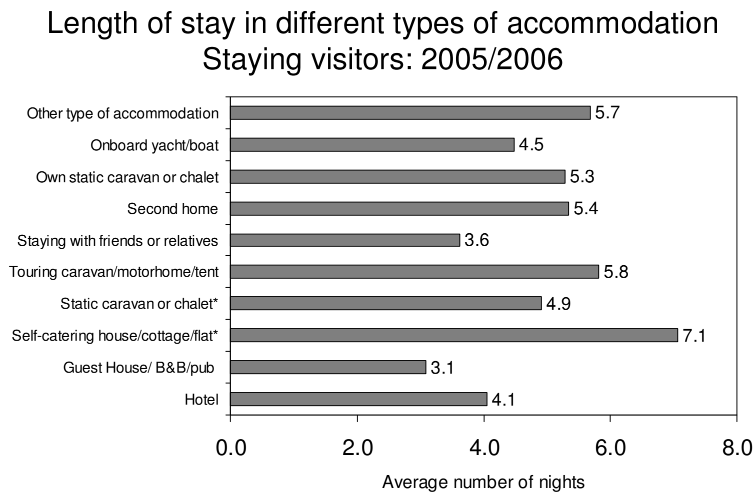
In total 41% of staying visitors used accommodation not covered by the occupancy survey, namely of second homes, privately owned caravans, homes of friends and relatives and yachts. This helps to explain why, at times, there is a reported increase in demand for accommodation in the visitor research which has not been experienced by accommodation providers.

The average length of stay in different types of accommodation is shown in the following chart.

The Island attracts a spread of longer stay and short stay visitors: the long stay visitors tended to use the self catering options whilst the short break visitors were more likely to use hotels/guesthouses and B&B's.

Rented houses/flats/cottages and touring sites attracted the longest staying visitors, closely followed by second homes and owned caravans. Static sites had a shorter average length of stay than both touring sites and houses/flats/cottages.

Trips to visit friends/relatives tended to be short stays.



* Rented accommodation

N.B. The occupancy survey includes hotels, guesthouses, B&B's, rented houses, cottages and flats, rented static chalet and caravan sites and touring caravan and camping sites but excludes yachts/boats, privately owned caravans, second homes and homes of friends/relatives.

4.7 Profile of domestic staying visitors

Visitor group composition across the whole year shows a strong bias towards adult visitors, as shown below.

This data has remained constant over time with only one fifth of staying visitors in groups with adults and children.

Those on holidays/short breaks are the one group where the proportion travelling with children increased: it exceeded a quarter of visiting groups this year, which is an increase versus last year.

	Adult only groups					Adult and children groups				
	2001/ 2002	2002/ 2003	2003/ 2004	2004/ 2005	2005/ 2006	2001/ 2002	2002/ 2003	2003/ 2004	2004/ 2005	2005/ 2006
All staying visitor groups	79%	79%	80%	80%	79%	21%	21%	20%	20%	21%
Holiday/ leisure trip	74%	73%	75%	77%	74%	26%	27%	25%	23%	26%
Visiting friends/ relatives	83%	83%	83%	82%	82%	17%	17%	17%	18%	18%
Business or business/ leisure combined	99%	98%	97%	96%	96%	1%	2%	3%	4%	4%

4.8 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 port are strong influences on likelihood to make a staying trip, hence Hampshire is the most important county - 15% of visitors originated there. This is closely followed by Greater London, then Surrey, Kent, Essex and West Sussex.

Smaller proportions do travel from across the UK.

Last year it was noted that Greater London may be declining in importance and the data this year shows that there has been no recovery in the proportion originating from London.

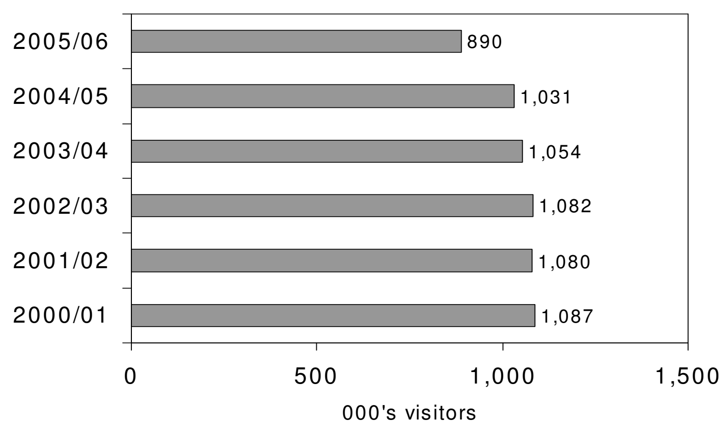
County	Est'd % of visits 2000/ 2001 000's	Est'd % of visits 2001/ 2002 000's	Est'd % of visits 2002/ 2003 000's	Est'd % of visits 2003/ 2004 000's	Est'd % of visits 2004/ 2005 000's	Est'd % of visits 2005/ 2006 000's
Hampshire	15%	13%	15%	16%	15%	15%
Greater London	14%	14%	13%	12%	12%	13%
Surrey	8%	8%	8%	7%	8%	9%
Kent	5%	6%	5%	5%	6%	6%
Essex	4%	4%	5%	6%	5%	5%
West Sussex	4%	4%	4%	4%	4%	4%
Berkshire	3%	3%	3%	3%	3%	3%
Somerset (inc. Bristol)	3%	3%	2%	3%	3%	3%
Dorset	3%	3%	3%	3%	3%	3%
East Sussex	3%	3%	3%	2%	3%	3%
Herts	3%	3%	3%	2%	3%	3%
Oxfordshire	2%	3%	2%	2%	2%	3%
West Mids.	3%	3%	3%	2%	2%	3%
Yorks (total)	3%	4%	4%	3%	2%	2%
Wales	2%	2%	3%	2%	2%	2%
Bucks	2%	2%	2%	2%	2%	2%
Wiltshire	2%	2%	2%	2%	2%	2%

4.9 Domestic day visitors

4.9.1 Estimated number of day trips

There were 890,000 day trips in the last year; this is a significant drop in volume versus recent years (-14%).

Estimated annual number of domestic staying and day visitors
Tourism year 2005/2006 vs previous years

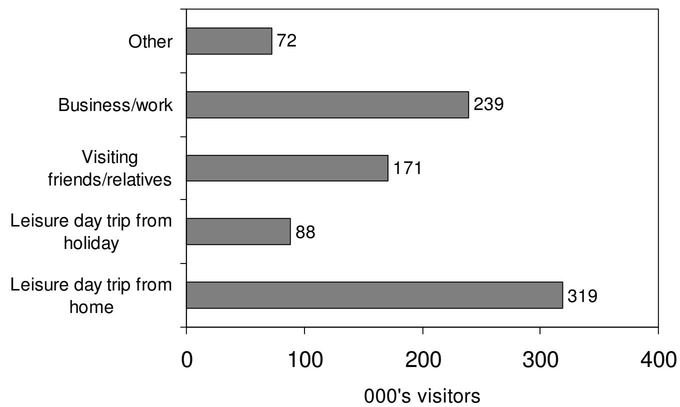


Analysis of these visits shows the purpose of the trip. The chart overleaf provides an estimate of the number of each type of day trip.

The most common reason to visit the Island on a day trip was to take a leisure day trip: there were 407,000 of these last year. The majority of these (78%) were day trips starting from home, the remainder being trips made by people whilst on holiday in the mainland area around the ports.

Almost 240,000 business trips were made to the Island (pure business plus combined business and leisure trips) and a further 171,000 day trips visits to friends/ relatives.

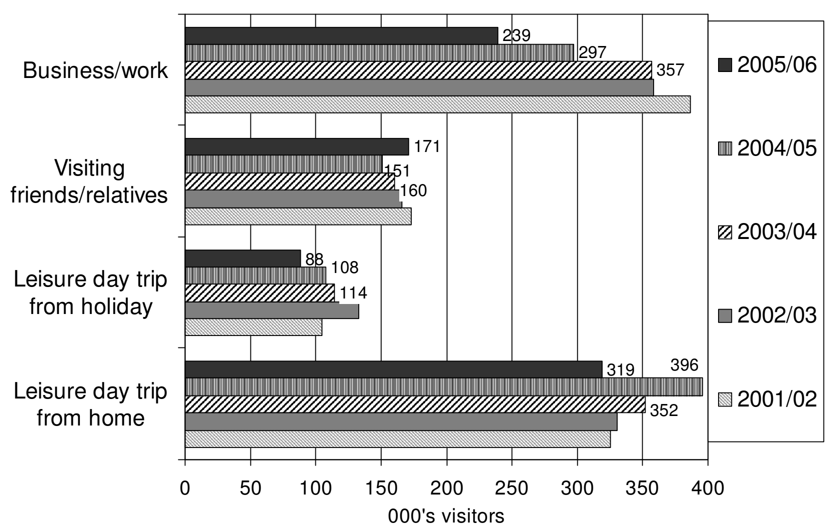
Purpose of day trips amongst domestic visitors
Tourism year 2005/2006



A reduction in the total number of trips has been noted: the following chart illustrates where changes have occurred versus recent years. The most significant change is the fall in business day trips - this is in long term decline (see Section 6). Leisure day trips starting from home also declined significantly versus last year although these do remain at a similar level to earlier years. Leisure day trips taken whilst on holiday are down slightly on the last 3 years.

The recent slight decline in visits to friends and relatives has been reversed this year.

Purpose of day trips amongst domestic visitors
Tourism year 2005/2006 vs previous years



4.9.2 Profile of domestic day visitors

The profile of visitors to the Island is biased towards adult only groups of visitors: 84% of day visitor groups comprised just adults and adult only groups dominated all day visitor types.

Amongst leisure day visitors, a higher percentage included children but these accounted for less than a third of leisure visitor groups.

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

4.9.3 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. 2005/2006 is shown together with previous years. Percentage of day visits originating from each county is given to allow comparisons over time.

In line with previous years, Hampshire remains the most important source of day trippers although there has been a slight drop in the percentage originating there.

There has been no change versus last year in the top ten counties for day trips, in fact these have remained very stable over recent years.

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

5. Repeat versus first time visitors

Leisure visitors are asked whether they have visited the Island before and, if so, the timing of their last visit.

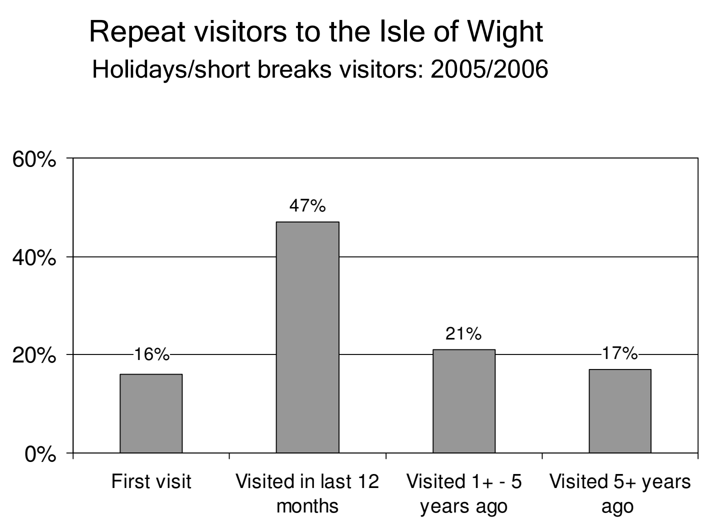
The focus in this section is on visitors taking leisure day trips, short breaks and longer holidays since those who are visiting friends and relatives tend to be regular visitors influenced primarily by invites from relatives rather than Isle of Wight Tourism marketing.

5.1 Short break and holiday visitors

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

A third of those on a short break or main holiday were new or lapsed visitors: 16% were on their first visit and 17% returned after a period of 5 or more years, ensuring the Island has renewed a part of its visitor base.

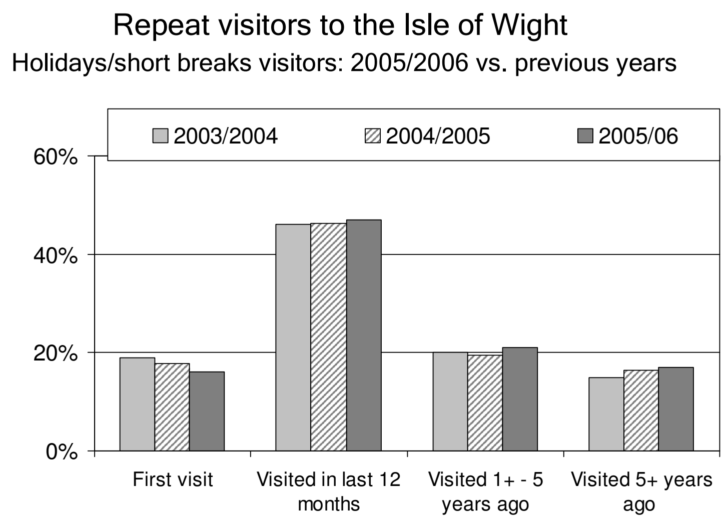
A large proportion (68%) are more regular visitors – indeed almost half were on their second (or more subsequent) visit and a fifth had visited the Island within the last 5 years but not the last 12 months. This demonstrates a great success in attracting holidaymakers and leisure visitors back to the Island and shows the Island is competing well with alternative destinations.



It is estimated that there were 340,000 new or lapsed visitors who came to the Island on a holiday or short break.

Estimated numbers of:	Short break/main holiday
New visitors	165
Lapsed visitors (5+ years)	175

Over the last three years there has not been much change: there has been a slight decline in the number of new visitors whilst those returning have increased very slightly. It is possible that recent new visitors to the Island have enjoyed the experience and become repeat visitors themselves.

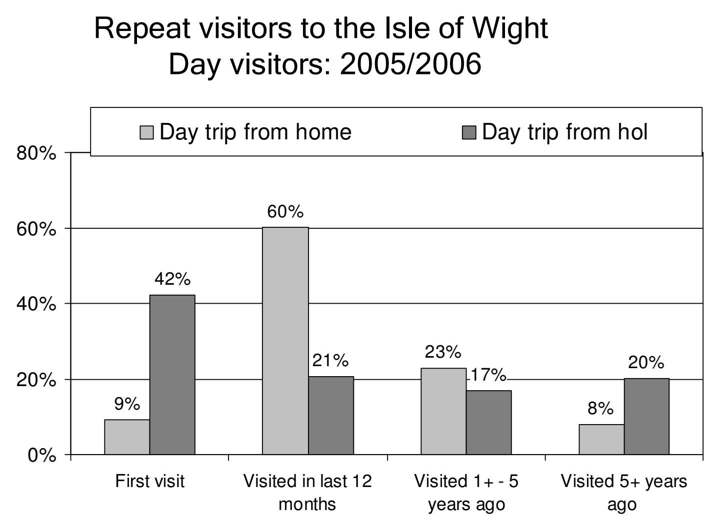


Analysis of type of accommodation used shows that new visitors and lapsed visitors are most likely to stay in a hotel, which makes them valuable visitors to attract.

5.2 Leisure day visitors

Leisure day visitors who travel *from their own home* make up the majority of day visitors. These tend to be regular visitors to the Island and live in the hinterland (Hampshire plus Surrey, West Sussex, Dorset and Greater London): 60% of them were on their second (or subsequent) visit and 23% had visited in the last 5 years. The Island is clearly successful at attracting leisure day trippers on a regular basis. The small proportion of new visitors (9%) and lapsed visitors (8%) do mean that the leisure day visitor base is being refreshed.

Visitors who come to the Isle of Wight for a leisure day trip *whilst holidaying nearby on the mainland* are potential short break or main holiday visitors of the future. These include many overseas residents. A much higher proportion of these were on their first trip (42%) or the first for several years (20%).



This translates to an estimated 140,000 new/lapsed visitors, which is below last year although this is expected due to the fall in total trips by leisure day visitors.

Estimated number of new and lapsed visitors	Day trip from home	Day trip whilst on holiday
	85	55

6. Prevalence of business trips

There were almost 350,000 business trips this year, which is a very significant drop versus last year (-22%). Domestic residents made the vast majority of business trips.

Over the long term, business trips have been in decline and there are now 33% fewer than in 2000/2001.

000's trips	2000/ 2001	2001/ 2002	2002/ 2003	2003/ 2004	2004/ 2005	2005/ 2006
All trips	523	496	457	473	447	348
Domestic trips	507	464	444	459	414	332
Overseas trips*	16	32	13	14	33	16

*N.B. Base for overseas estimates is very small

Business trips were dominated by domestic day trips: these made up two thirds (67%) of the total.

7. Overseas visitors

An estimated 131,000 overseas residents visited the Island last year, over half of whom were on a staying visit. The table below provides an estimate of the main reasons for visiting.

	Trips 000's*
Leisure day trip	50
Holiday	23
• 1 - 4 nights	17
• 5+ nights	6
VFR:	33
• Staying	29
• Day trip	4
Business:	16
• Staying	13
• Day trip	3

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

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

In 2005/06 the number of overseas visitors fell to 131,000, which is the lowest number recorded in the last six years. This drop is due to a reduction in business visitors, holidaymakers and leisure day visitors.

	2000/ 2001	2001/ 2002	2002/ 2003	2003/ 2004	2004/ 2005	2004/ 2005
Visitors 000's*	147	162	155	178	156	131

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

Thinking about demand for accommodation, an additional 525,000 bednights were needed for these visitors, of which, it is estimated, 325,000 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; there is a long list of other countries generating much smaller numbers.

Over the long term there are few significant changes with the top 4 countries unchanged over recent years and little change in the top ten.

The USA remains the most important source of overseas visitors as it has been every year except that following the 9/11 attacks. However American visitor numbers dropped considerably this year – down from a high point of 19% to 13% of visitors, reflecting the effect of the terrorist threats at UK airports this summer.

Germany and France follow as they have done over recent years. Other important European countries are Netherlands, Spain, Eire, Italy and Belgium.

Origin of overseas visitors						
000's visits Country	Est'd % of visits 2000/ 2001	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
USA	14%	10%	19%	14%	16%	13%
Germany	7%	14%	9%	10%	8%	10%
France	6%	7%	13%	10%	12%	8%
Australia	9%	8%	8%	8%	9%	8%
Canada	5%	3%	6%	6%	4%	7%
Netherlands	4%	7%	6%	5%	4%	6%
Spain	2%	5%	5%	4%	5%	5%
Eire	4%	3%	5%	5%	4%	5%
New Zealand	5%	3%	3%	3%	3%	5%
South Africa	4%	7%	3%	3%	4%	3%
Italy	9%	5%	3%	2%	3%	3%
Belgium	2%	1%	*	1%	1%	2%
Denmark	5%	1%	*	3%	1.5%	1%
China	*	1%	1%	1%	3%	1%

* Less than 1%

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

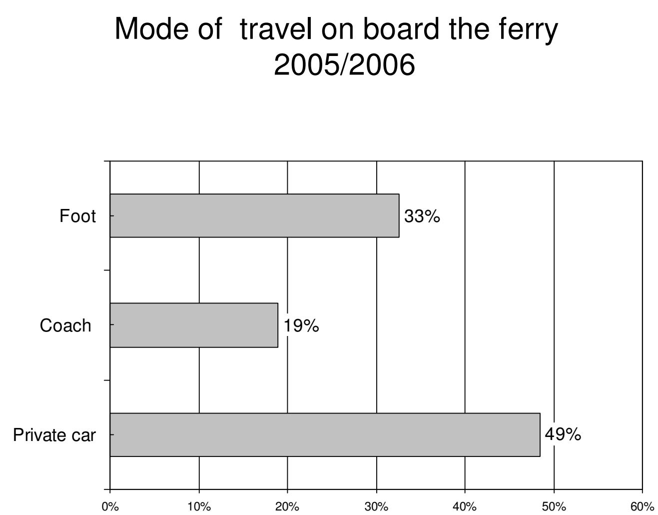
8 Mode of transport

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.

N.B. Only one full year of data is not available at present, hence no comparisons over time can be made.

8.1 Mode of travel on board the ferry

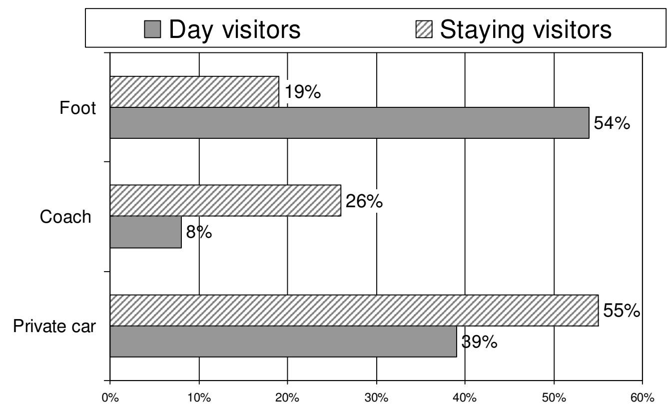
Travel by car is the most common mode of travel followed by pedestrians: it is estimated that approximately half (50%) the ferry passengers travelled by car and a third as foot passengers. Across the year coach travel accounted for only one in seven visits.



When this is analysed by whether visitors are staying or on a day trip, quite stark differences emerge:

- Many more staying visitors travelled by car (55%) than as foot passengers (19%). Just over a quarter of staying visitors travelled by coach.
- Conversely day visitors were most likely to be pedestrians (54%) meaning they are likely to have made use of public transport. Only 39% visited with a car and a minority by coach.

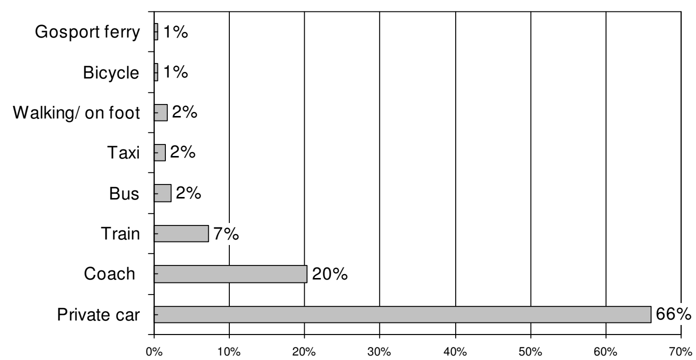
Mode of travel on board the ferry 2005/2006



8.2 Mode of travel to the mainland terminal

A majority of visitors travelled by road to the mainland terminal and the private car was most frequently used (66%). 20% arrived by coach plus 2% by bus and 1% by bike. Only 7% travelled by train to the mainland terminal.

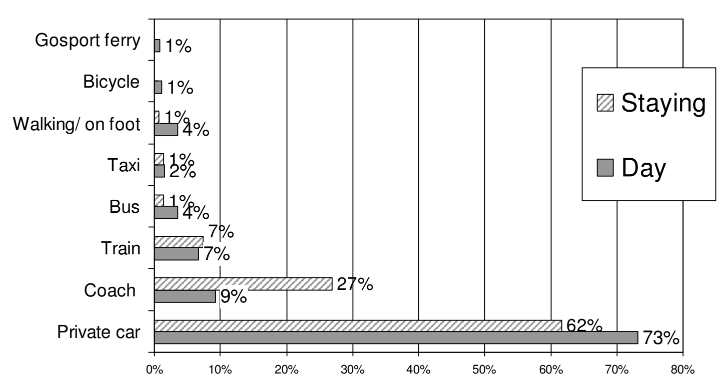
Transport used to travel to the mainland terminal
2005/2006



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

There were some differences in the mode of travel to the port used by day and staying visitors. More staying visitors travelled by coach and the incidence of this was in line with travel by coach on board. However almost double the number of day trippers travelled to the mainland port by car as went on board with a car, creating a big demand for day parking on the mainland.

Transport used to travel to the mainland terminal
2005/2006

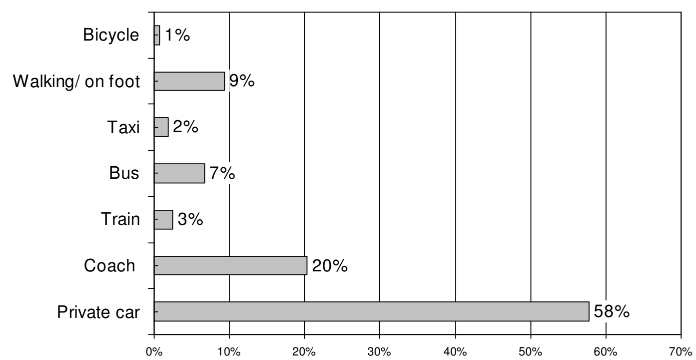


8.3 Mode of travel around the Isle of Wight

On the Island, the private car dominates travel: 58% used this as their main mode of travel. 7% used the Island bus service, many more than when travelling to the mainland terminals. Use of the Island train services is at half this level (3%).

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

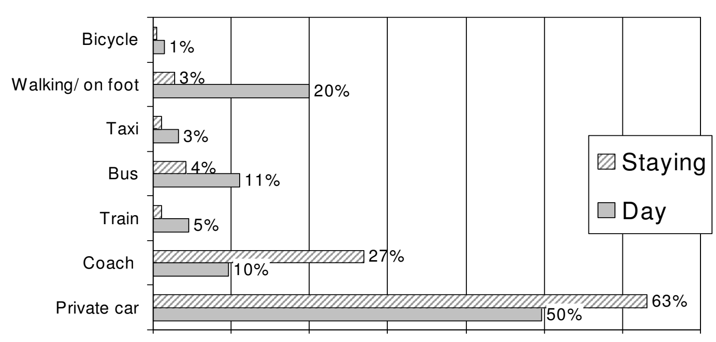
Transport used to travel around the Island 2005/2006



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.

Once again there were differences according to the type of visitor: staying visitors were more dependent upon the car and coach than day visitors. Day visitors made much more use of public transport and were more likely to be walking than staying visitors.

Transport used to travel around the Island 2005/2006



9. Value of tourism

Tourism on the Isle of Wight is now estimated to be worth £371 million for the tourism year 2005/2006.

Domestic staying trips are the most important element of tourism visits; these contributed £312 million to the Isle of Wight economy which is 84% of the total. Within staying domestic trips the vast majority (89%) is derived from short breaks and long holidays.

Spending by staying visitors from overseas added another £26 million to the economy. Thus total revenue from staying trips reached £339 million.

Day trips generated an additional estimated £32 million in tourism revenue, again derived primarily from domestic residents.

	£Millions
Staying trips	
All domestic staying trips	£312
All overseas staying trips	£26
All staying trips (domestic and overseas)	£339
Day trips	
All domestic day trips	£30
All overseas day trips	£2
All day trips (domestic and overseas)	£32

Comparing spend with the previous year (excluding the effect of inflation), the estimated spend fell by 3%. This slight decline is attributable to changes in the visitor mix already noted. The main factors were:

- The significant decline in day trips
- A slight decline in longer holidays
- A decline in staying business trips
- A decline in visits by overseas residents.

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.

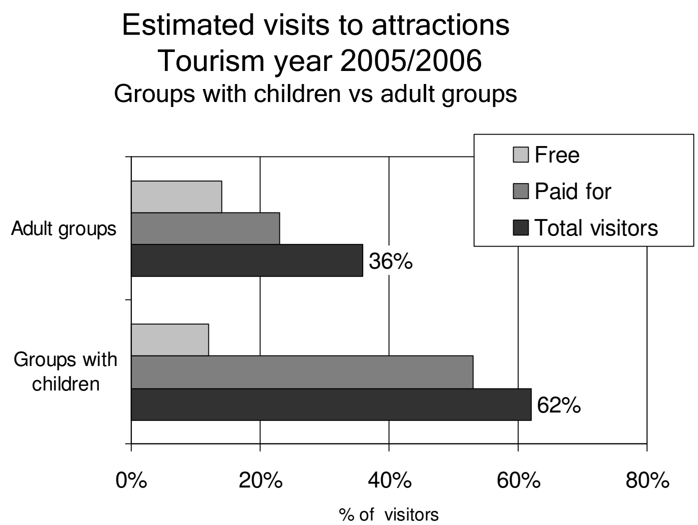
10. Attractions

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. (N.B. Historically, attempts were made to collect more accurate data from the attractions but insufficient attractions participated in this survey.)

42% of all leisure visitors visited an Island attraction (free and/or with admission fee combined). Staying visitors were much more likely to visit than day visitors: 49% versus 28% respectively.

Parties with children visited attractions much more than adult only groups.



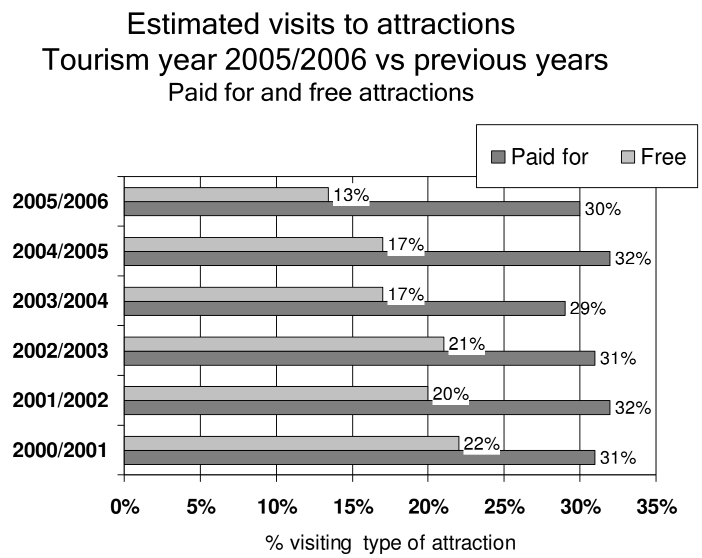
Propensity to visit varies enormously between different types of visitors. This ranged from a low level of 26% for staying VFR visitors up to 90% of main holidaymakers, as shown in the table below. Attractions charging an entrance fee were consistently more likely to be visited than free attractions.

Leisure day visits starting at home	33%
Leisure day visits taken whilst on holiday	56%
Visitors on a main/long holiday	90%
Visitors on a short/leisure break	61%
Visitors on a staying VFR trip	26%

Frequency of visiting the Island also affects propensity to visit attractions with new visitors and those who have not visited in the last 5 years much more likely to visit.

	New visitor	Visited before 5+ years ago	Visited before 2- 5 years ago	Visited before in last 12 months
% visited any attraction	67%	65%	54%	30%

The trend in visits to attractions is shown below. This year saw a decline in visits to both paid for and free attractions. Visits to free attractions reached the lowest point recorded.



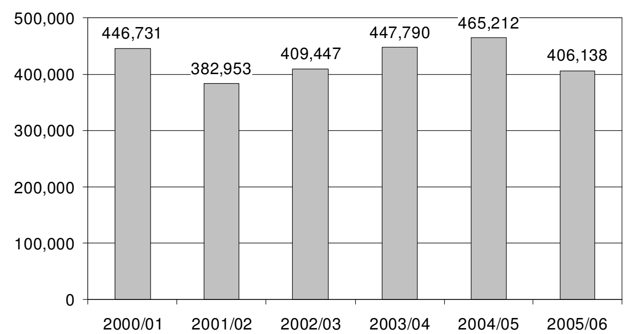
11. Isle of Wight Tourism activity levels

11.1 Tourist Information Centres

Just over 400,000 visitors went to the Island's Tourist Information Centres this year. This is a decrease of 13% versus last year and reverses the recent upward trend in visitor numbers.

Average spend at the TIC's was £8.90 which is up from £7.45 last year and from £5.69 the previous year. These are considerable increases and it is sales of (high value) concert tickets that have helped to boost the average spend over the last two years.

Annual number of visitors to the Isle of Wight offices TIC



N.B. The method of recording visitor numbers changed in April 2004; this is now monitored automatically, thereby improving the accuracy of the data. This may have affected year on year comparisons.

11.2 islandbreaks.co.uk website activity

There were almost 650,000 visits to the Isle of Wight Tourism website during the year to end of August 2006. This is an astounding increase – of 32% versus last year. It is also 20% above the number of visitors during 2004/05.

Visits to islandbreaks.co.uk
2005/2006 vs. previous years