# Isle of Wight Tourism
# Activity monitor

## End of year report
## Tourism year 1999/2000

108.103/104

## 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 1999/2000 were:

- first quarter: post summer peak to end of calendar year: 6/9/1999 - 31/12/1999
- second quarter: January to two weeks before Easter: 1/1/2000 - 9/4/2000
- third quarter: two weeks before Easter to the summer peak: 9/4/2000 - 16/7/2000
- fourth quarter: the summer peak season : 17/7/2000 - 3/9/2000.

Contents

# 1. Introduction

This report provides commentary on the Isle of Wight tourist industry for the tourism year 1999/2000 (6th September 1999 to 3rd September 2000).

External factors not specific to the Isle of Wight which may have influenced tourism across the UK during this period are detailed below. The specifics of tourism on the Isle of Wight are dealt with in the main body of this report.

The economic backdrop to the tourism year 1999/2000 has been healthy with inflation under control. The most tangible result of low inflation has been fairly stable but low interest rates together with steady economic growth. High unemployment has become a thing of the past and consequently fear of unemployment has receded. These factors combine together to build consumer confidence.

1. Rate of inflation: following a relatively stable period early in 1999, RPI increased slightly from 1.3% in September 1999 up to 3.3% in September 2000.
2. Bank of England base rate: in the first half of the tourism year the base rate rose to 6% but has remained stable at this level for the remainder of this year, making mortgage/loan repayments fairly predictable and giving consumers confidence in their level of disposable income.
3. Unemployment rates: falling unemployment has been a feature of this tourism year. UK unemployment has fallen from 4.2% last September to 3.7% in August, 2000. Comparable figures for the South East are 2.4% last September down to 2% in August.
4. House prices: following a period of rapid house price inflation in the South East during the early part of this tourism year, prices have stabilised. The calming of the housing market may have reduced this distraction from the holiday market.
5. Strong pound: the pound continues to be strong making holidays abroad seem good value. It reached a peak during May (an important month for main holiday planning and booking) but has slipped back slightly since then.
6. Duty free: this was abolished mid way through 1999 making day shopping trips to France less attractive during the whole of this tourism year versus last.

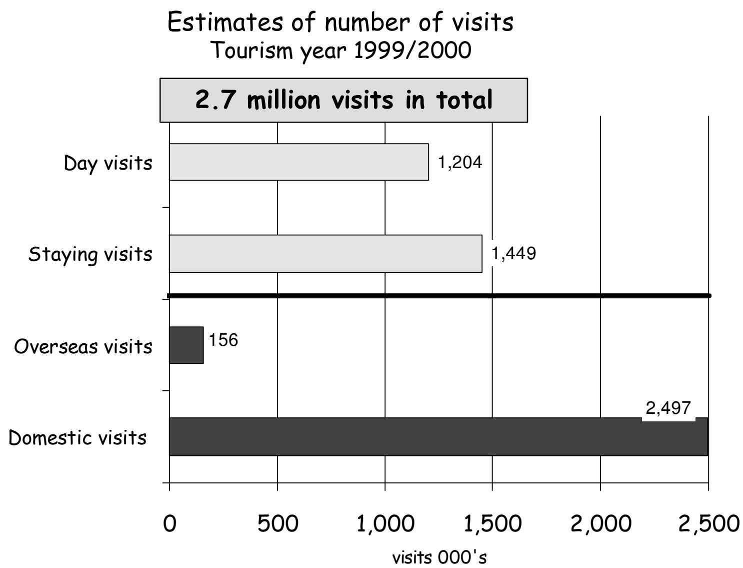
*See page 2: Reporting periods for dates of all quarters

## 2. Summary of key points in the tourism year 1999/2000

Across the whole year there were 2.7 million visits to the Island (domestic and overseas combined), the vast majority of which were made by UK residents (page 8).

Tourism to the Island occurs year round with the average number of visitors per week ranging from a low of 34,000 in the second quarter to a high of 100,000 in the peak season (Q4) (page 8).

There were just under one and a half million staying visits requiring in the region of 6.7 million bednights (domestic and overseas combined). Day visits reached 1.2 million (page 10).




Key points in the year include:

- holiday/leisure stays reached 890,000 in the year. Short stay holidays (1 - 4 nights) were more common than longer stay holidays (5+ nights): 526,000 versus 364,000. The majority of holiday trips were described as an 'other holiday or leisure stay' showing that the Island is succeeding in attracting short breaks and additional holidays. Only 104,000 holidays were described as a 'main holiday (pages 13 and 19);'
- there were 348,000 staying visits to see friend/relatives and 182,000 day visits to see friend/relatives, a total of over half a million trips (pages 13 and 19);
- business visits were most likely to be day trips (417,000 visits). Staying business visits (including business combined with leisure trips) reached 155,000 visits. Approximately a quarter of all business visits arose from tourism, retailing and catering business (pages 10, 13 and 19);
- annual bed occupancy in catered accommodation was 47% but ranged from 15% in January to 82% in August (page 21);
- annual room occupancy in catered accommodation was 56%; this ranged from 18% in January to 88% in August (page 22);

- average annual length of stay across all domestic visits was 4.4 nights but this ranged from 2.9 in Q2 to 6.1 in Q4 (page 15).

# 3. Weather on the Isle of Wight

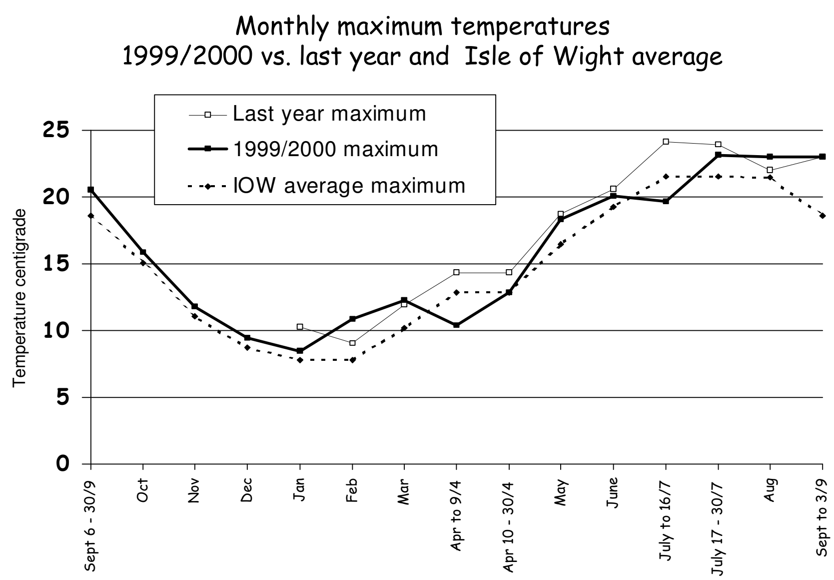
Continuous recording and reporting of weather is provided by Medina Valley Centre, Newport. Temperature, sunshine hours and rainfall can be compared with a long term average to show how typical the current weather is.

The following charts show weather for the 1999/2000 tourism year together with comparative data a year earlier and the long term average.

## 3.1 Maximum temperatures

For the first half of the year temperatures were above the long term average, especially during February and March. However the second half of the year was more variable: there were untypical drops in temperature during the first few days of April and during the first half of July but the weather was warmer than average during the peak season.

Comparing the temperatures this year with last year, it has been colder this year with the exception of February and August. The cooler weather experienced this year was particularly marked during April and the first half of July when there was also heavy rain.



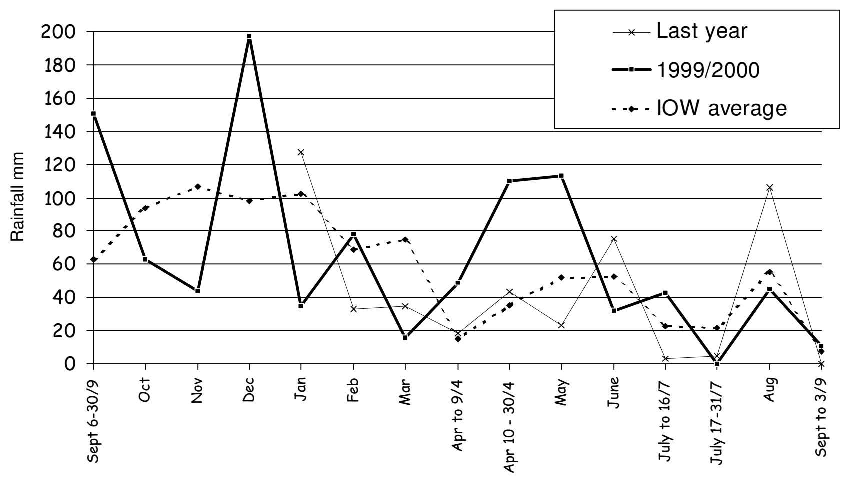

Apr., Jul and Sep last year and Island average are for full month, latest figures are for part month

## 3.2 Rainfall

Heavy rainfall, compared with the long term average, has affected much of this year. Particularly high rainfall occurred last September, December, April, May and the first half of July meaning that a large proportion of the third quarter was affected by wet weather. This may have deterred spontaneous trips to the Island. During the last quarter, the peak season, there was less rain versus the long term average, giving the Island a reasonable peak season.

Compared with last year, the weather has tended to be much wetter this year apart from during the peak season. August in particular was drier than in 1999.

Monthly rainfall
1999/2000 vs. last year and Isle of Wight average



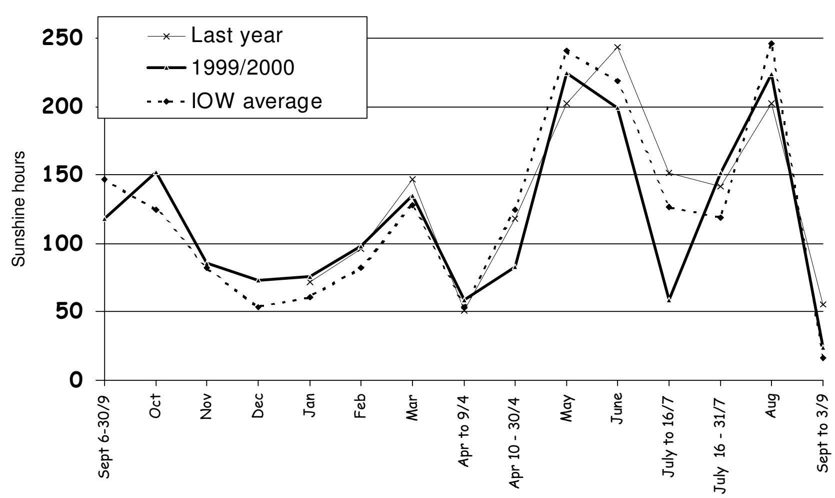

Apr, Jul and Sept rainfall for last year and Island average assumes even spread through the month

3.3 Sunshine hours

During the first half of the year sunshine hours were slightly above the expected level for the time of year. However the wet weather occurring in the third quarter meant below average sunshine for this period. Sunshine hours improved for most of the peak season.

Compared with last year, there was inevitably much less sunshine during the wet third quarter but more sunshine in August.

Monthly sunshine hours
1999/2000 vs. last year and Isle of Wight average



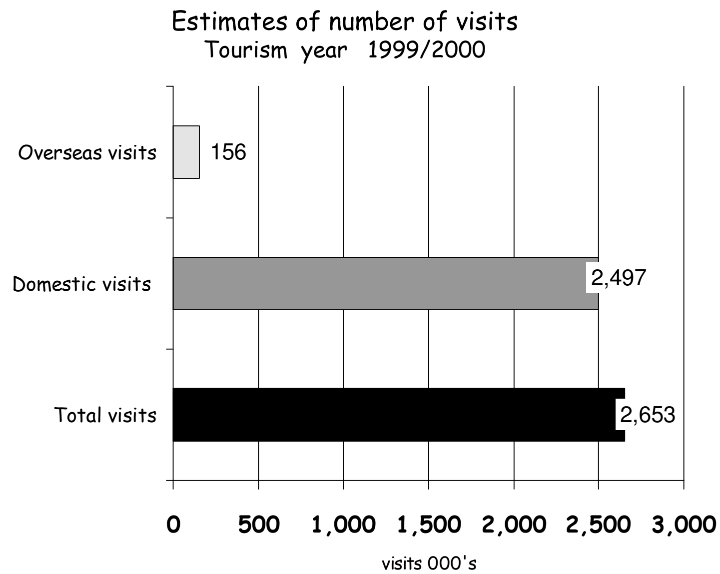

Apr, Jul and Sept sunshine for last year and Island average assumes even spread through the month

# 4. Visits to the Isle of Wight

## 4.1 Estimated total number of visits

During the peak season period (17th July to 3rd September 2000) there were 701,000 visits to the Isle of Wight. This takes the total for the 1999/2000 tourism year to almost 2.7 million visits (including both domestic and overseas visitors to the Island).

Across the whole year, domestic visitors account for the vast majority of visits: 2.5 million versus just over 150 thousand visits by overseas residents, as shown below.

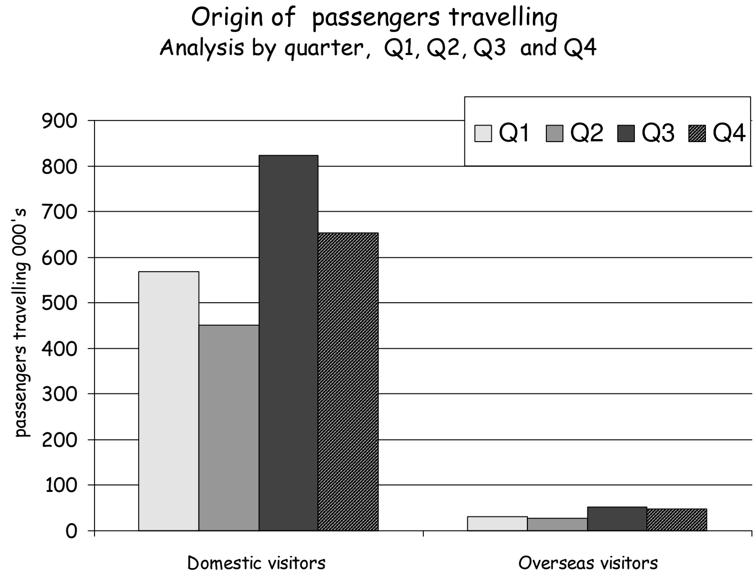



The following table illustrates the estimated average number of visits per week* during each quarter of the 1999/2000 tourism year. This demonstrates the relatively high volume of visits in the peak season (Q4) but, more importantly, highlights the year round nature of tourism on the Island. The average number of visits per week did not fall below 34,000 even during the second quarter which is normally considered to be the low season.

| | Average number of visitors per week (thousands) | |
|---|---|---|
| | Domestic visitors thousands per week | Overseas visitors thousands per week |
| Quarter 1: 6/9 - 31/12/1999 | 34 | 2 |
| Quarter 2: 1/1 - 9/4/2000 | 32 | 2 |
| Quarter 3: 10/4- 16/7/2000 | 59 | 4 |
| Quarter 4: 17/7 - 3/9/2000 | 93 | 7 |

The next chart shows how these averages translate into estimated numbers of visitors per quarter.

*Average number of visits/week is used to compare across quarters to compensate for differing length of quarters.




N.B. Number of weeks per quarter varies

The following table compares the volume of domestic visitors per quarter in the year compared with the previous year. This shows that domestic visitors increased very slightly in the second quarter, remained static in the third quarter and declined slightly in the fourth quarter, as discussed above.

| | Average number of domestic visitors per week (thousands) | |
|---|---|---|
| | 1999 | 1999/2000 |
| Quarter 1 | n/a* | 34 |
| Quarter 2 | 30 | 32 |
| Quarter 3 | 60 | 59 |
| Quarter 4 | 95 | 93 |

*survey not started until January 1999

Domestic and overseas visitors will be dealt with separately in the remainder of the report.

4.2 Domestic visitors' type of trip

Section 4.2 deals with trips made by domestic visitors only.

Across the whole year, staying visits accounted for 54% of trips and day trips 46%. However, this profile does change according to the time of year, as shown below. In the first quarter (September - December) trips were split evenly but in the second quarter day trips were more common. In the third and fourth quarters the balance was in favour of staying.

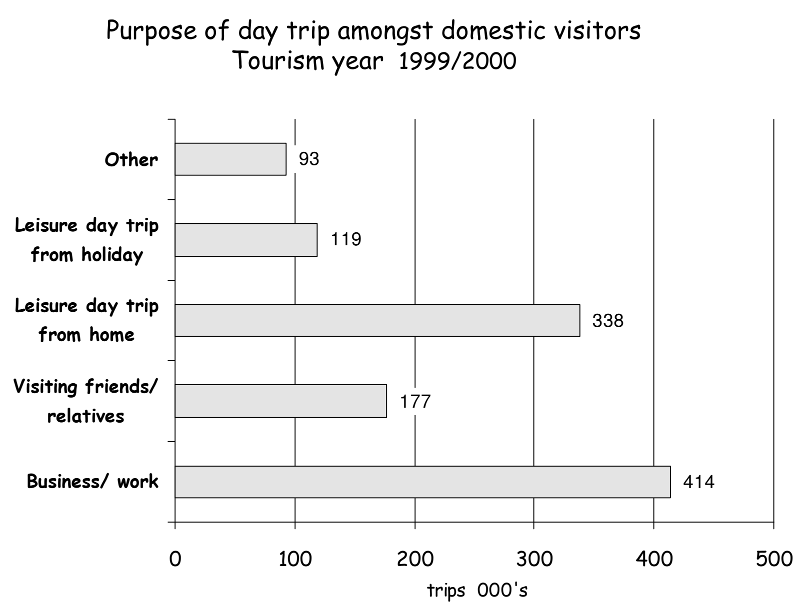
| | Quarter 1 | Quarter 2 | Quarter 3 | Quarter 4 | Total year | |
|---|---|---|---|---|---|---|
| Day visitors | 49% | 60% | 37% | 45% | 1,204,000 | 46% |
| Staying visitors | 51% | 40% | 63% | 55% | 1,449,000 | 54% |

4.2.1 Domestic day visits

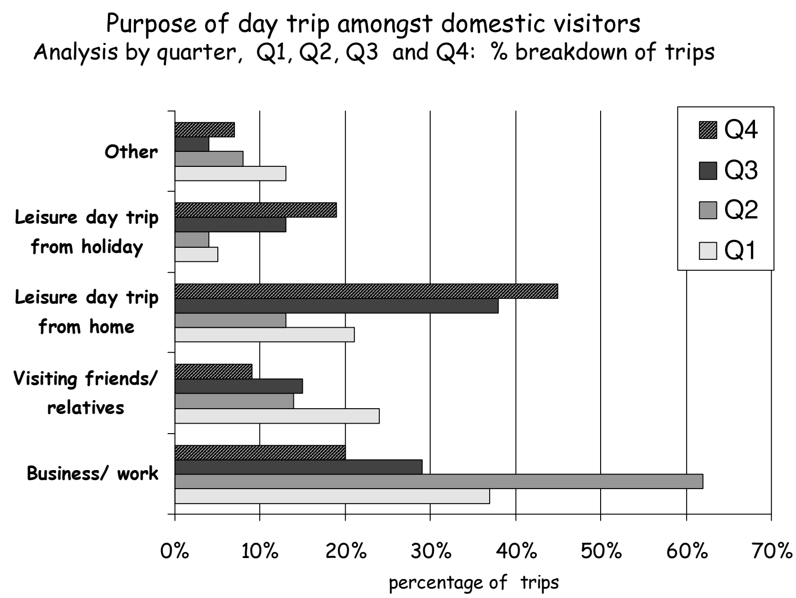
4.2.1.1 Domestic day visitors' type of trip

The chart below shows the breakdown of day trip types for the tourism year. Leisure day trips were most numerous with over 450,000 such trips. Almost three quarters of these were day trips starting at home as opposed to those taken whilst on holiday near the Isle of Wight.

Business trips were also extremely important generating 414,000 visits through the year. VFR day trips accounted for another 177,000 trips.



The chart below shows the changes in profile of day trips across the tourism year. This illustrates how leisure day trips have become much more important in the third and fourth quarters. Day trips for business were most prevalent in the second quarter although they do occur at a lower level all year.  VFR day trips were most common in the first quarter and least common in the fourth quarter (peak season).

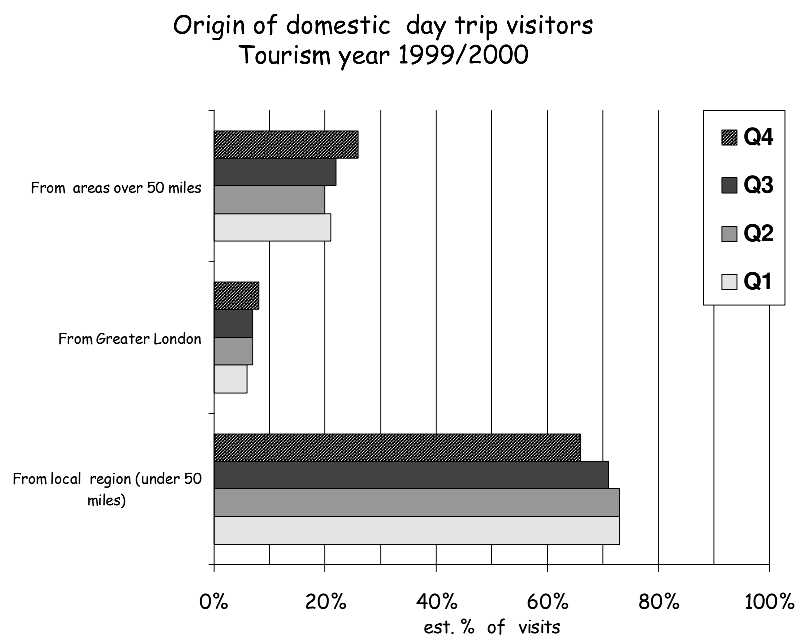


4.2.1.2 Domestic day visitors' origin

The following chart examines the origin of day trips from areas local to the Isle of Wight (within 50 miles) versus Greater London and areas over 50 miles from the Island.

An average of 70% of trips originated from areas within 50 miles of the Island. Greater London produced 7% and the remaining 23% came from more distant areas.

The main difference occurring across the year is the increased emphasis on trips from the local areas in the first and second quarters. In the fourth quarter (peak season) the proportion of trips made by visitors living further than 50 miles increases from a fifth of trips to a quarter of trips. Many of these trips will be accounted for by day trips made whilst already on holiday in the area near to the Island.



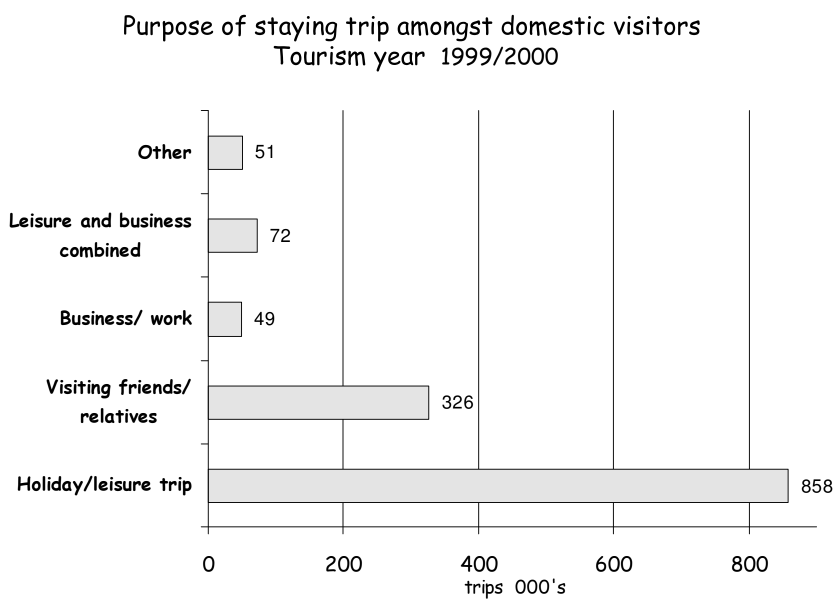

N.B. Under 50 miles defined as Hampshire, Surrey, West Sussex, Dorset and Berkshire

4.2.2 Domestic staying visits

4.2.2.1 Domestic staying visitors' type of trip

The following chart illustrates the profile of domestic staying trip types for the tourism year. There were over 850,000 holiday/leisure trips of which 505,000 were short breaks (1 - 4 nights) and 350,000 were longer stay holidays (5+ nights). However, when asked to describe their trip type, only a minority (12%) said they were on a main holiday which equates to 102,000 main holidays. The remainder were on a short break, additional holiday or other leisure trip. This illustrates the importance of the Isle of Wight as a second/additional holiday location as well as a short break destination.

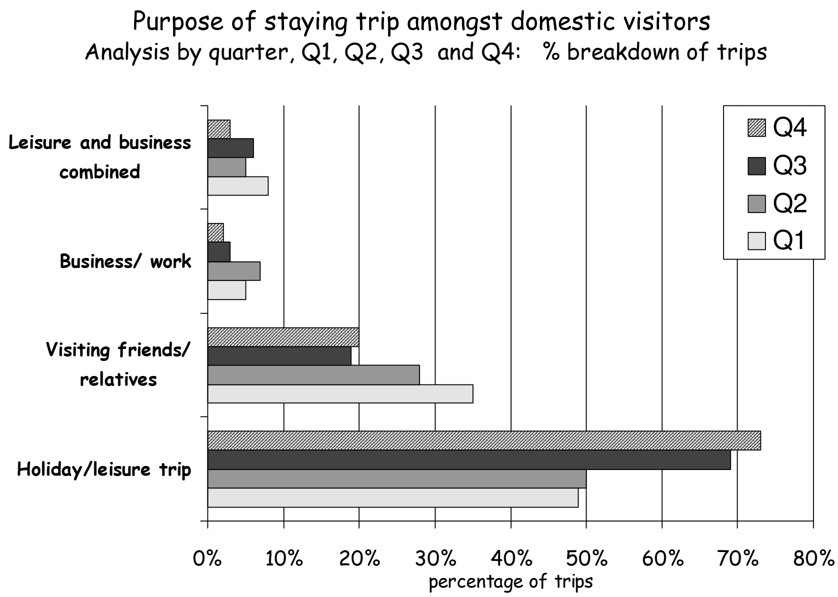
The other major reason for visiting is trips to visit friends and relatives; this accounted for 326,000 trips in the year. There were over 120,000 business trips and these were most likely to be a combined business and leisure trip.



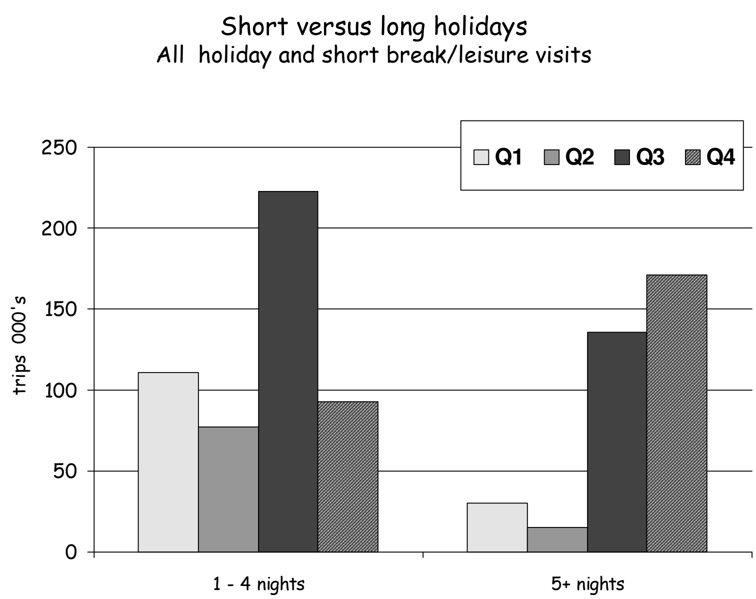

The changing pattern of trip types through the year is illustrated on the following chart (percentage breakdown within each quarter is given to make comparisons over time easier).

All types of trips occur in each quarter but differences include:

- holidays were the most common reason throughout but much more prevalent in the third and fourth quarters;
- VFR trips were more common in the first and second quarters;
- Business and combined business and leisure trips occurred at a fairly constant but low level through the year.




Looking at the split between long and short stay trips through the year shows that it was only in the peak season (quarter 4) that long stay trips of 5+ nights out-numbered short breaks, as shown below.



4.2.2.2 Demand for bednights amongst domestic visitors

Amongst those staying on the Island, the number of nights spent on the Isle of Wight was recorded, from this the demand for bednights can be estimated.

The average length of stay across all domestic trips was 4.4 nights; the following table shows how this varied by quarter.

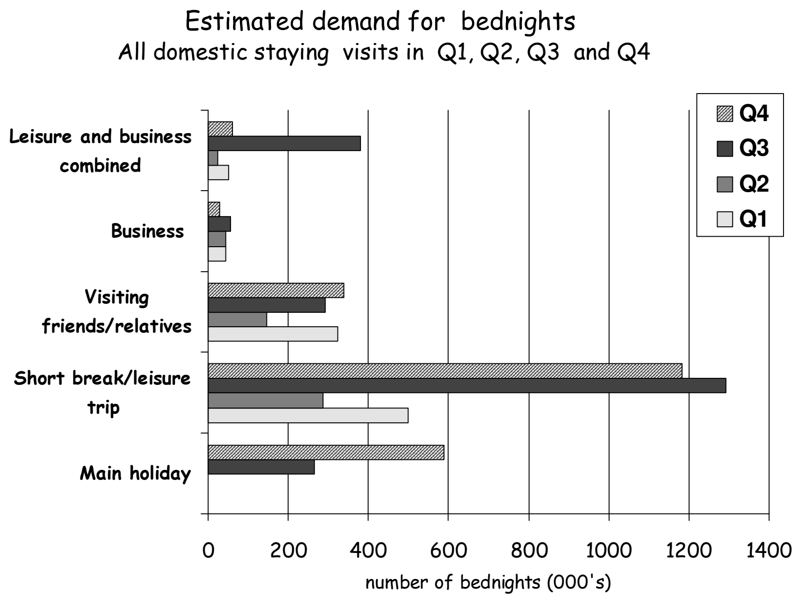
| | Quarter 1 | Quarter 2 | Quarter 3 | Quarter 4 | Total year |
|---|---|---|---|---|---|
| No. of nights | 3.2 | 2.9 | 4.4 | 6.1 | 4.4 |

The annual estimated number of bednights required for all domestic staying visits is just under 6 million, 1.1 million of which is for VFR trips. Thus demand for commercial accommodation in the year is estimated to be 4.9 million bednights.

The following table shows the demand created by different trip types.

| Type of domestic trip | Length of stay<br>nights | Demand for bednights<br>millions |
|---|---|---|
| Main holiday | 8.4 | 0.9 |
| Short break/leisure trip | 4.3 | 3.3 |
| Visiting friends/relatives | 3.4 | 1.1 |
| Business | 3.6 | 0.2 |
| Leisure and business combined | 7.1 | 0.5 |
| All domestic staying trips | 4.4 | 6.0 |

Looking at changes occurring through the year, shown below, there was huge demand for holiday accommodation in the third and fourth quarters due to both main and short break holidays. However short stay holidays also created considerable demand through the first and second quarters. Demand from business visits was fairly constant year round apart from in the third quarter when combined business and leisure trips pushed up demand.


Estimated demand for bednights
All domestic staying visits in Q1, Q2, Q3 and Q4
Q4
Q3
Q2
Q1
Leisure and business combined
Business
Visiting friends/relatives
Short break/leisure trip
Main holiday
0
200
400
600
800
1000
1200
1400
number of bednights (000's)

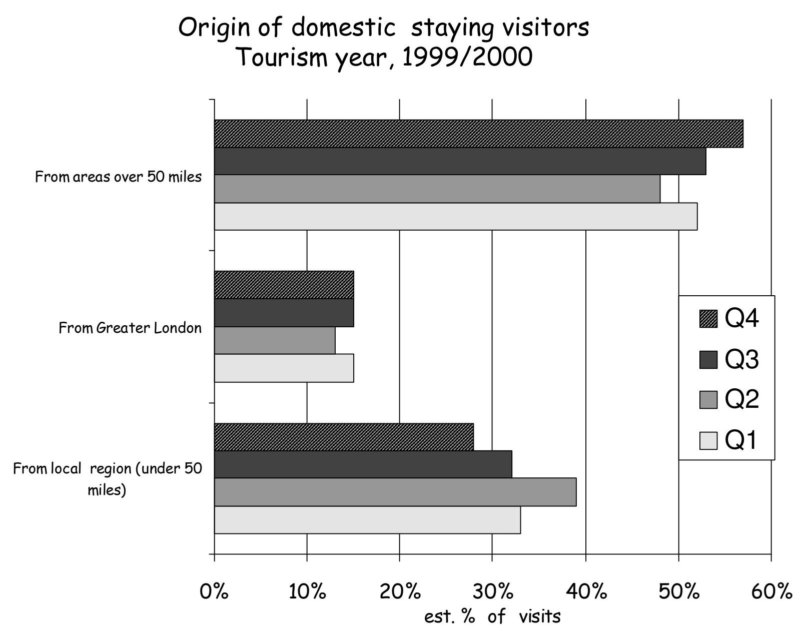
4.2.2.4 Domestic staying visitors' origin

Staying visits originated from a wide spread of areas. A third of staying visitors were from within 50 miles of the Island. Greater London produced 15% whilst over half (53%) came from areas over 50 miles from the Island.

The following chart shows the origin of staying trips across the year

Apart from the second quarter (pre-Easter) over half the staying trips originated from over 50 miles away and staying visits were most likely to originate from over 50 miles from the Island during the peak season which is when longer trips are taken.

Visits originating from Greater London were fairly constant across the year at 15%.




N.B. Under 50 miles defined as Hampshire, Surrey, West Sussex, Dorset and Berkshire

## 4.3 Purpose of business 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 or catering sectors. The proportion of all business visits related to tourism, retail or catering was 26%. However staying visits were more likely than day visits to be related to tourism, as detailed below.

| | Day visits | Staying visits | All visits |
|---|---|---|---|
| Tourism, retail or catering | 24% | 34% | 26% |
| Other business area | 76% | 66% | 74% |

A detailed breakdown of these "other" business trips is also available (for Q3 and Q4, 2000 only).

In both quarters the construction and maintenance industry was the most important other business area for generating trips to the Island. In quarter 3 this was on a par with tourism but generated fewer trips in the peak season. Manufacturing generated far less than tourism but is another important reason for visiting the Island. Other areas of business generated significantly fewer trips than tourism.

| Business area | Q3<br>% of all business trips | Q4<br>% of all business trips |
|---|---|---|
| Tourism, retail or catering | 19% | 26% |
| Construction and maintenance | 19% | 19% |
| Manufacturing | 12% | 11% |
| Health service/social work | 6% | 7% |
| Public services, admin./local government | 9% | 6% |
| Financial services | 7% | 6% |
| Telecoms & communications | 4% | 4% |
| Wholesale and distribution | 2% | 2% |
| Transport | 1% | 2% |
| Agriculture, forestry and fishing | 1% | 1% |
| Other | 21% | 18% |

## 4.4 Overseas visitors

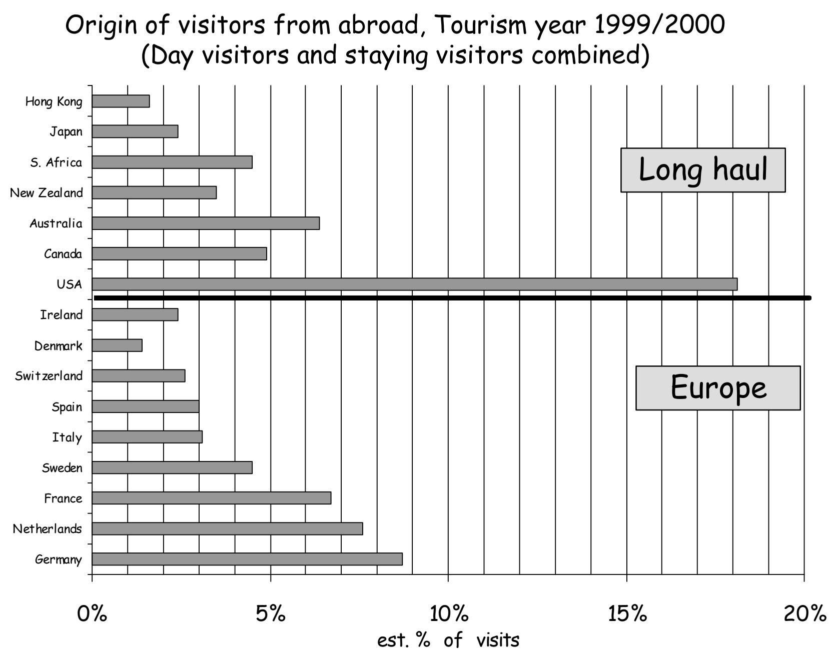
During the year there were over 155,000 visits from overseas, 60% of which were staying visits, 40% were day visits.

The majority of day visits were leisure day trips (over 80%); 8% were business trips and 8% were VFR trips.

Over a third of staying visits were business trips or business and leisure combined; another third were holiday trips; a quarter were VFR trips.

The origin of overseas visitors is illustrated on the following chart, showing countries which produced at least 1.5% of trips.

The most important source of visitors was USA/Canada from where almost a quarter of visitors originated. The most important European countries were Germany and France.



## 4.5 The coach market

From January to early September there were 210,000 coach passengers travelling to/from Isle of Wight. (N.B. This includes Isle of Wight residents and visitors).

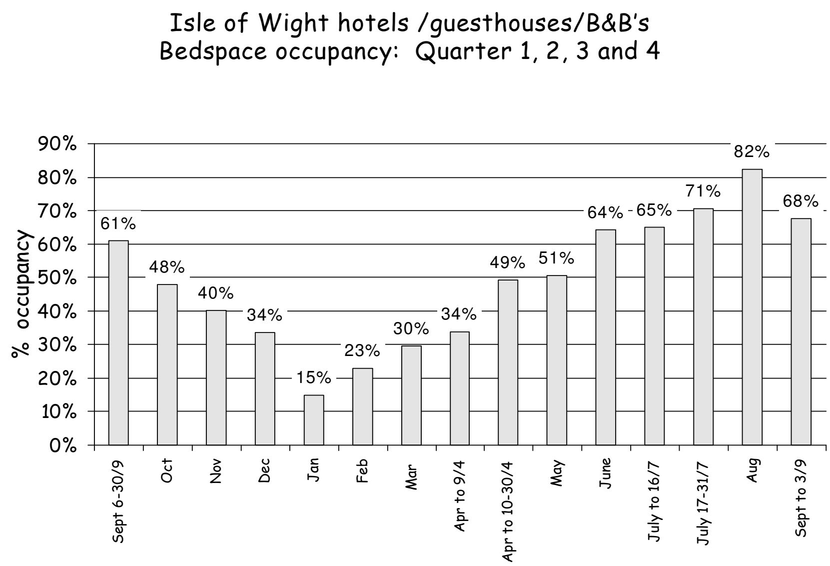
Compared to the same period last year, this represents a decline 2.5%. This may have been influenced by the Millennium Dome, potentially attracting day trippers away from more traditional coaching destinations. It may also reflect the strong pound, making coach trips abroad more appealing.

# 5. Demand for accommodation on the Isle of Wight

## 5.1 Hotels, guesthouses and Bed & Breakfast occupancy

### 5.1.1 Bedspace occupancy

Monthly bedspace occupancy levels across all catered accommodation are shown below for the tourism year 1999/2000. At the start of the year occupancy was at 61% and this fell steadily to a low point of 15% in January. From this point onwards it increased to a high point of 82% in August. During the first few days of September occupancy declined quite rapidly to 68%.

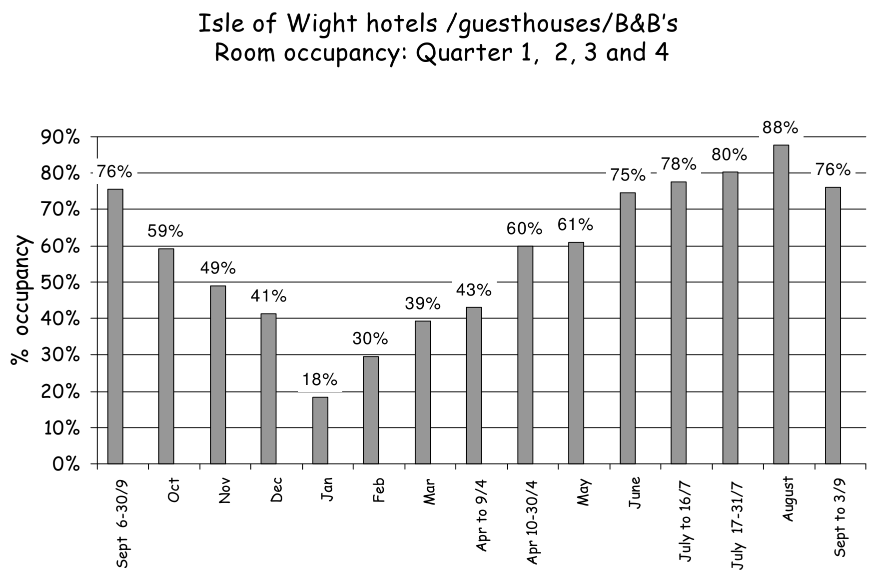



The annual average bed occupancy (September 1999 - August 2000) was 47% which is on a par with the Southern region and Hampshire but below Dorset, as shown below.

| Tourism area | Annual bed occupancy |
|---|---|
| Isle of Wight | 47% |
| Southern | 47% |
| Dorset | 52% |
| Hampshire | 46% |

5.1.2 Room occupancy

In late summer, 1999 room occupancy stood at 76%. Whilst this reduced each month it held up well through the autumn/Christmas season, falling to 41%. In January the fall was more marked, down to 18%. From February this started to recover, reaching 60% at Easter and during May, then rising again through to a high point of 88% during August. Rates for each month are illustrated below.

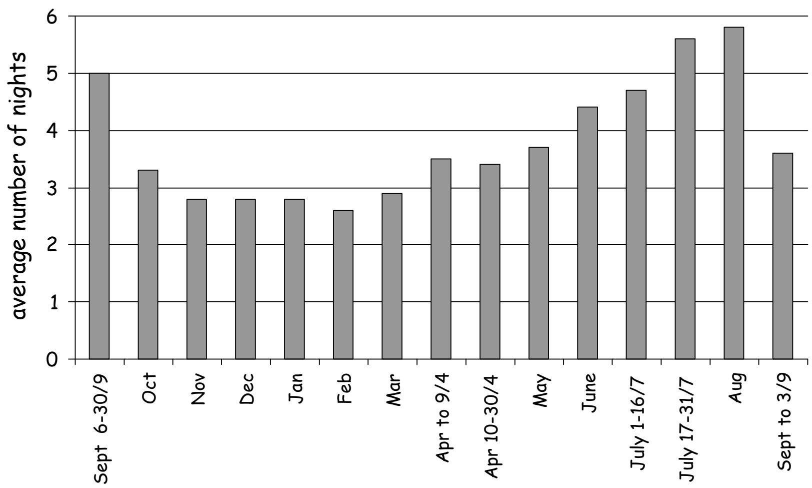



The annual average room occupancy (September 1999 - August 2000) was 56% which is below Southern, and Hampshire and Dorset, as shown below.

| Tourism area | Annual room occupancy |
|---|---|
| Isle of Wight | 56% |
| Southern | 62% |
| Dorset | 62% |
| Hampshire | 63% |

Average length of stay within the serviced sector is shown on the next chart. Last September average length of stay was at 5 nights. After five winter months when this fluctuated between 2.5 and 3 nights, average stay started to increase over Easter. and has continued to increase each month. The longest stay was during the peak holiday month of August (5.8 nights). However, in the first 3 days of September length of stay dropped quite suddenly to 3.7 nights.

Isle of Wight hotels /guesthouses/B&B's
average length of stay: Q1, Q2, Q3 and Q4



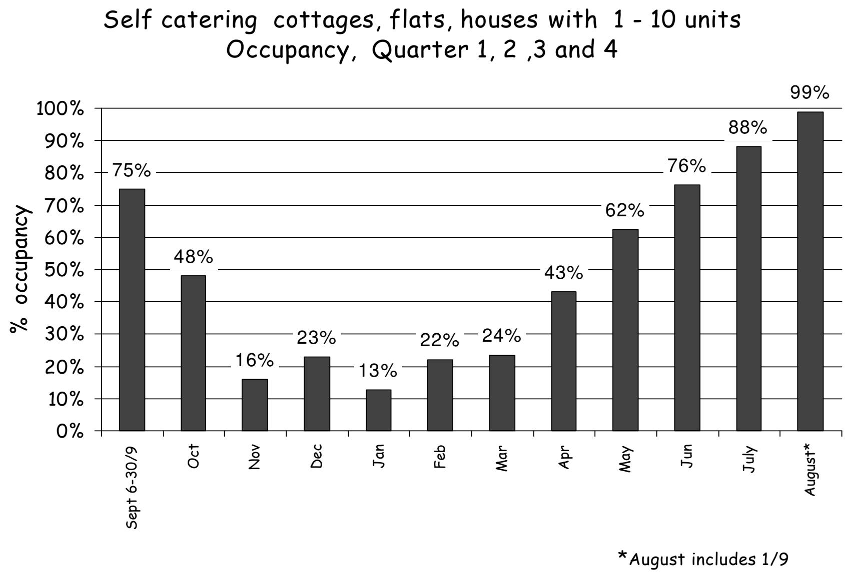

The annual average length of stay (September 1999 - August 2000) was 3.6 nights which exceeds Southern, and Hampshire and Dorset by a significant margin, as shown below.

| Tourism area | Length of stay (nights) |
|---|---|
| Isle of Wight | 3.6 |
| Southern | 2.2 |
| Dorset | 2.6 |
| Hampshire | 2.0 |

5.2 Self catering cottages, flats and houses

5.2.1 Operators with 1 - 10 units

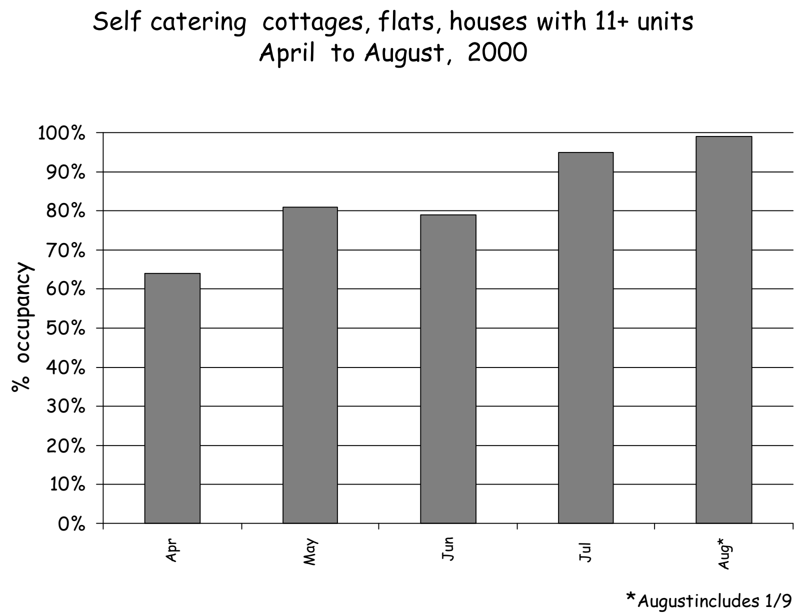
Occupancy in this sector exceeded 60% for 5 months of the year and accommodation was completely booked up in the peak month of August. It was at a high of 75% at the end of last summer, falling to 48% in October, then fluctuated around 13% - 24% during the winter months. From April onwards increases occurred every month to reach 88% in July and 99% in August.



5.2.2 Operators with 11+units

Larger operators' occupancy levels should be treated with caution due to a small number of establishments responding. Occupancy is shown for the summer period only as there are insufficient operators taking part in the survey at other times.

The data received suggests that occupancy ranged from around two thirds occupancy in April to full occupancy in August.

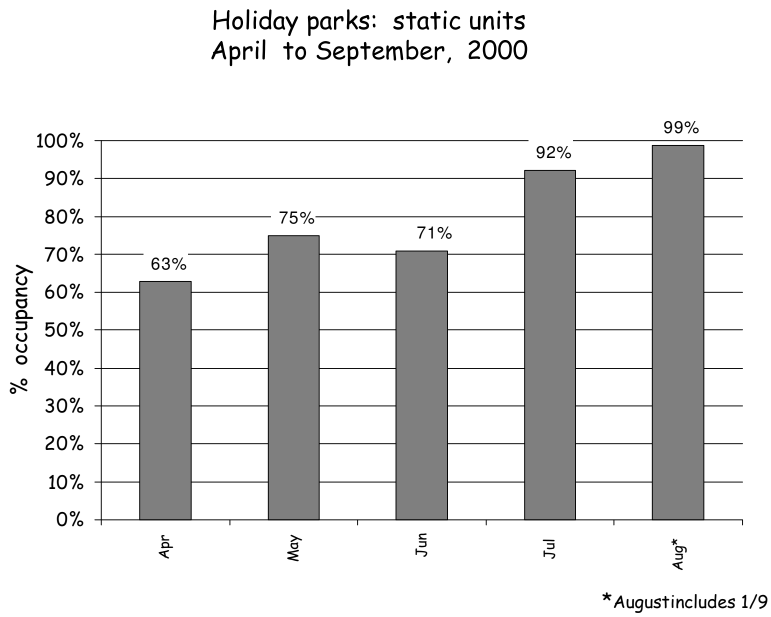


5.3 Holiday parks/sites

5.3.1 Static sites

Between 3 and 5 of these sites responded hence results can only be taken as a rough guide to performance in this sector.

Occupancy was at 62% in April and rose to 75% in May. There was a slight drop in June but occupancy rose to 92% in July and to full capacity in August.

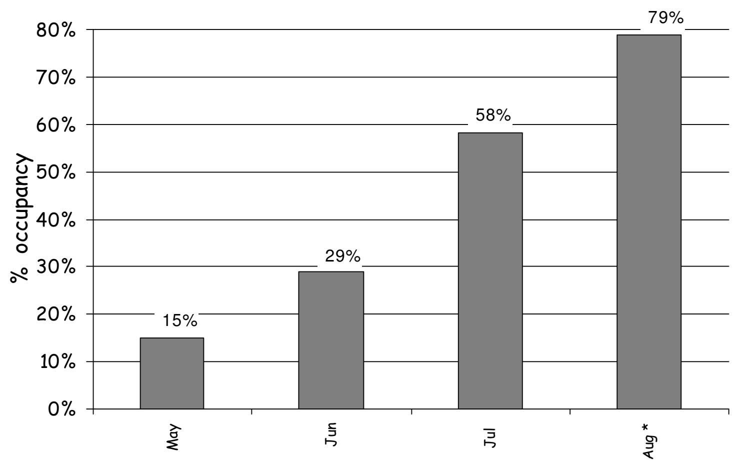


5.3.2 Touring sites

To date only 3 of these sites have responded so once again results can only be taken as a general indicator of performance in this sector.

Occupancy was at 15% in May, rising to 29% in June and 58% in July. During August this reached 79%. Performance in this sector was considerably lower than static sites and other self catering accommodation.

Holiday parks: touring units
May to September, 2000




*Augustincludes 1/9

# 6. Attractions

In order to ensure that some relevant statistics are made available for visits to attractions, all leisure visitors, returning from the Isle of Wight, are now asked whether they have visited a free or paid for attraction during their visit. This question was introduced in quarter 2.

It should be noted that this methodology may under represent visits to attractions because it relies upon recall of visits whilst on the return journey home. In addition there may be some visits to free attractions which are not recorded if respondents did not regard the establishment as an attraction.

Visits to attractions varied according to time of year, with visits most likely in the peak season when over half (53%) of the leisure visitors travelling visited an attraction, free and/or with admission fee. The estimated proportion (of all leisure visitors to the Island) visiting any attraction (free and/or paid for) each quarter is shown below:

| | Q2 | Q3 | Q4 |
|---|---|---|---|
| Visited any attraction free/paid for | 27% | 46% | 53% |

In addition to differences by quarter, there was considerable variation between the different types of visitors: perhaps not surprisingly given the additional time spent on the Island, staying leisure visitors were more likely to visit an attraction at any time of the year, as detailed below.

| | Visited any attraction free/paid for | | |
|---|---|---|---|
| | Q2 | Q3 | Q4 |
| Day visitors | 13% | 31% | 42% |
| Staying visitors | 35% | 54% | 61% |

Looking at staying visits in more detail shows up some marked differences according to the type of visit: those on holiday were much more likely to visit an attraction than those visiting friends and relatives. This is true regardless of time of year. Visitors who are visiting friends/relatives are a discreet market which has not yet been developed by the attractions.

| | Visited any attraction free/paid for | | |
|---|---|---|---|
| Main purpose of staying visit | Q2 | Q3 | Q4 |
| Holiday/short break | 53% | 71% | 74% |
| To visit friends/relatives | 16% | 28% | 40% |

Another major influence on whether attractions were visited is presence of children in the party. The Island has a selection of adult orientated attractions but many are targeted primarily towards children/families. (N.B. This data is available for quarters 3 and 4 only.)

In both quarters many more groups of visitors which comprised adults and children visited an attraction than groups without any children, as shown below.

| | Visited any attraction free/paid for | |
|---|---|---|
| Party composition | Q3 | Q4 |
| Adult only group | 41% | 46% |
| Group with children | 59% | 69% |

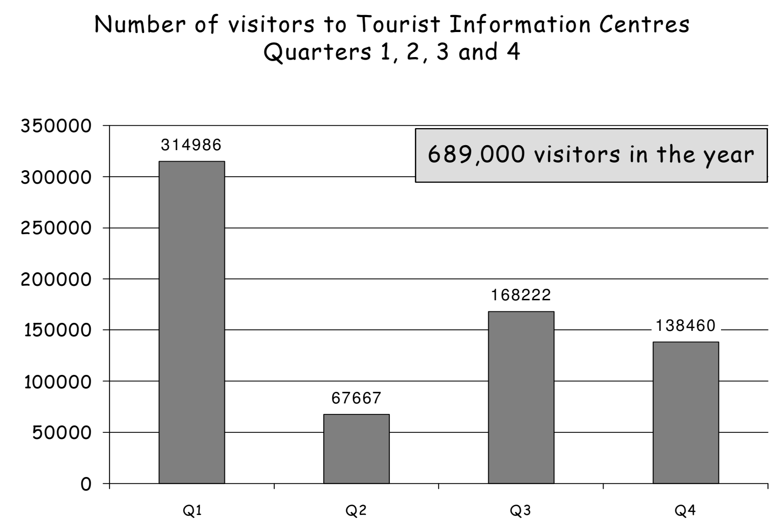
## 7. Activity levels at Island Tourist Information Centres/Hotline

The number of visitors calling at the seven Island Tourist Information Centres was just under 700,000 visits in the tourism year.

In order to compare volume of visitors across the year, the average number of visitors per week is given in the following table showing that it was the first and fourth quarters which were the busiest at the TIC's.

| 000's | Quarter 1 | Quarter 2 | Quarter 3 | Quarter 4 |
|---|---|---|---|---|
| Average visitors per week | 19 | 5 | 12 | 20 |

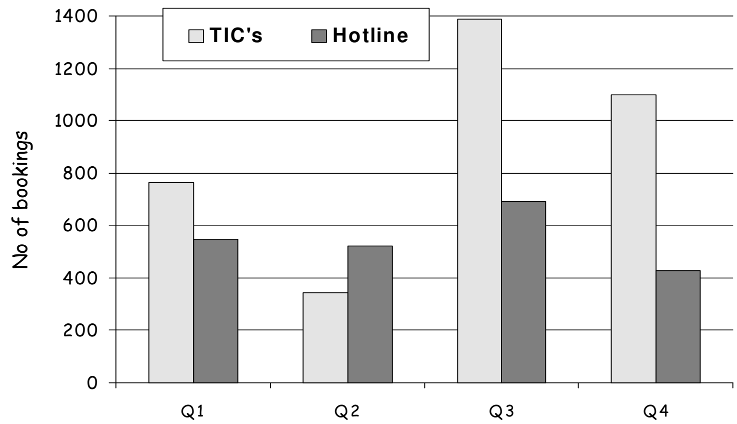
The following chart shows how these averages translate in numbers of visitors.




Actual holiday bookings taken on the Isle of Wight Tourism Hotline and in the Island Tourist Information centres (booked by people visiting the offices in person) are shown on the following chart.

TIC's handled the majority of bookings in the first, third and fourth quarters showing just how last minute many holidays are. In the peak season TIC's took almost two and a half times the number of bookings taken by the Hotline.

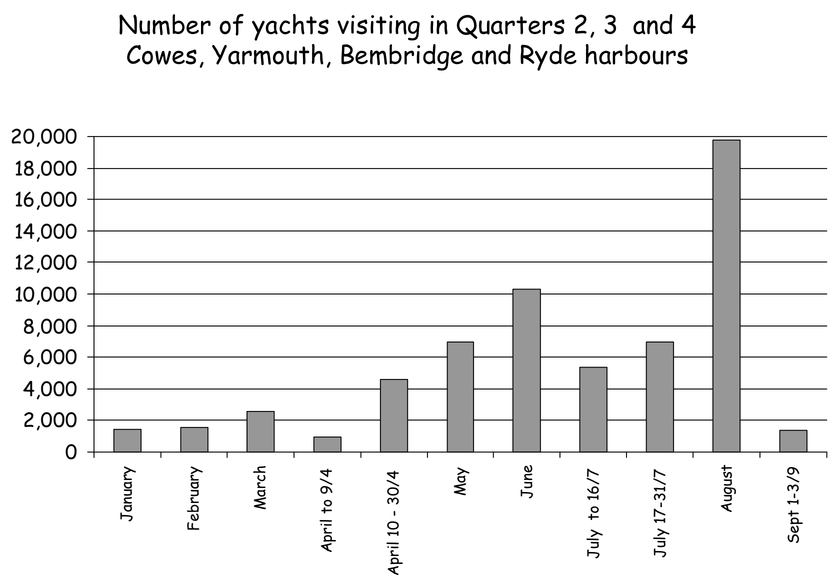
Hotline and TIC holiday bookings
Bookings taken, Quarters 1, 2, 3 and 4



## 8. Number of yachts visiting the Isle of Wight

The number of visitors arriving on the Isle of Wight by yacht/boat is not included in the visitor numbers reported in section 4 due to their independent mode of arrival. This is an important element of tourism on the Island hence the number of yachts/boats at the Island ports each night* is collated.

The chart below shows the numbers per night at Yarmouth, Cowes,** Bembridge and Ryde.




In order to estimate the number of visitor nights, it is assumed that the average yacht has 4 people. The table below shows the average number of yachts nights and visitor nights per week (thousands) in each quarter to allow comparison over time. This shows the emphasis on the fourth quarter, which of course includes Cowes week.

| 000's | Quarter 2 | Quarter 3 | Quarter 4 |
|---|---|---|---|
| Average yacht nights per week | 0.5 | 1.9 | 4 |
| Estimated average visitors per week | 1.8 | 7.8 | 16 |

*Yachts per night are shown hence a yacht staying two nights is counted twice. Short stay visits (day visitors not staying overnight) are also included.

**Cowes includes Cowes Harbour, Cowes Yacht Haven and East Cowes Marina

## 9. Spend in Isle of Wight Pubs

Whitbread Pub Partnership has provided information relating to spend on drinks within a sample of 18 pubs on the Island. These particular pubs have been selected because they derive a large percentage of their trade from tourists and because the year on year comparisons are not due to changes in the outlet itself (e.g. refurbishment, change of management etc.). They therefore provide a good reflection of the tourism on the Island.

The chart below shows the year on year comparisons in sales of drinks for each quarter.

The overall trend across the year is towards increased drinks sales with the most positive comparisons occurring during the first and second quarters. However year on year comparisons were less positive in the peak season: when only half of the pubs had an increase in sales, probably reflecting the decline in staying visitors on the Island. during the peak.

Spend in Isle of Wight pubs (drinks)
% change* in Quarter 1, 2, 3 and 4

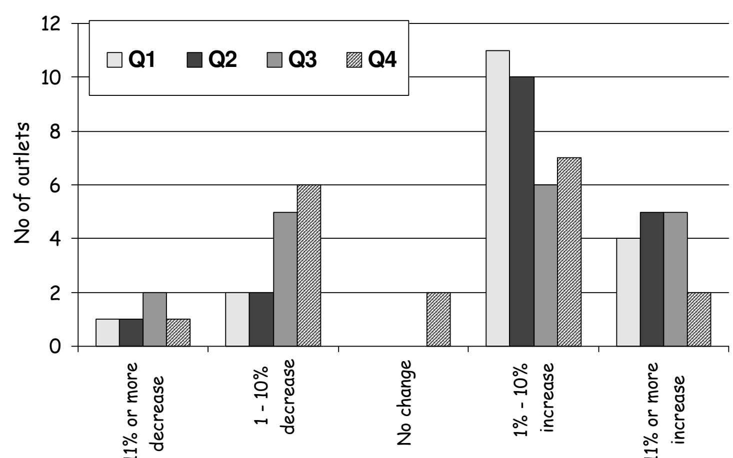



*Chart shows % change versus previous year

## 10. Unemployment levels on the Isle of Wight*

*N.B. All unemployment figures shown below differ from reports issued prior to Q2 1999/2000 due to revisions to the government data. Please use the following data not that reported previously.

The long term trend in unemployment (claimant) on the Isle of Wight has continued to decline and it is now significantly lower than at any point in 1999. This is in line with the UK and the South East.

Unemployment on the Island is cyclical due to the importance of tourism as a source of employment. From a peak of 7.4% in January this year, unemployment dropped to 4.8% in June as the Island geared up for the tourism season. It remained unchanged in July but a small drop was recorded in August taking this to 4.6%. This is likely to be the lowest level in the year as it is the peak season for tourism.

The table below shows claimant unemployment for the Island together with the UK and South East.

| | Isle of Wight | UK | South East |
|---|---|---|---|
| January 1999 | 9% | 4.8% | 2.8% |
| June 1999 | 5.9% | 4.3% | 2.4% |
| September 1999 | 5.6% | 4.2% | 2.4% |
| December 1999 | 6.7% | 3.9% | 2.2% |
| January 2000 | 7.4% | 4.3% | 2.4% |
| February 2000 | 7.1% | 4.2% | 2.4% |
| March 2000 | 6.5% | 4.1% | 2.3% |
| April 2000 | 5.7% | 3.9% | 2.2% |
| May 2000 | 5.2% | 3.8% | 2.1% |
| June 2000 | 4.8% | 3.7% | 2% |
| July 2000 | 4.8% | 3.7% | 2% |
| August 2000 | 4.6% | 3.7% | 2% |

Youth unemployment on the Island has been falling but, in line with the South east and UK, it rose very slightly during August to 20.8%.

Isle of Wight youth unemployment is consistently below the UK average and in June fell just below the South East level for the first time. In July youth unemployment rose slightly across the UK, reflecting the end of the academic year, however youth unemployment on the Island remains below the South East and the UK as a whole. This is shown in the following table.

| | Isle of Wight | UK | South East |
|---|---|---|---|
| March 2000 | 23.7% | 23.8% | 20.8% |
| April 2000 | 21.0% | 23.2% | 20.2% |
| May 2000 | 20.2% | 22.9% | 19.6% |
| June 2000 | 19.5% | 22.9% | 19.4% |
| July 2000 | 20.2% | 24.7% | 20.9% |
| August 2000 | 20.8% | 25.3% | 21.8% |