Isle of Wight Visitor Monitor 2016
Results for Quarter 4 (1 Oct to 31 Dec)

Total visitor volume compared to this time last year

- 398,291 visitors in Quarter 4
  - Up 0.2%
- 2.38 million visitors over the last 12 months (Jan-Dec 2016)
  - Up 0.2%

Total visitor spend compared to this time last year

- £40.1m spent in Quarter 4
  - Down 0.3%
- £295.9m spent over the last 12 months (Jan-Dec 2016)
  - Up 6.7%

1. Overall visitor volume was down 0.2% compared with Q4 last year. Overnight visitor volume was marginally down by 0.7% while day visitor volume was up by 1.8%, possibly boosted by better weather compared with Q4 2015. Overall visitor spend during Q4 was down by just 0.3% compared to this time last year.

2. For overnight visits, leisure/holiday represented 63% of trips to the Island, with high numbers compared to 2012 to 2014 volumes, but down from the particularly high numbers achieved in 2015.

3. Day trips were made more for leisure purposes in Q4 compared to last year and less for business, although business remains one of the top purposes for day-trips (one third of day-trip visitors travelled for business).

4. Preparations for Britain’s departure from the European Union dominate headlines and have forced a substantial reduction in the value of Sterling. This has made visits to the UK cheaper whilst potentially discouraging outbound tourism from the UK. The latter half of 2016 has seen an increase in the proportion of overseas visitors to the Isle of Wight, boosted possibly by a combination of currency movements and successful marketing activity by Visit Isle of Wight.

No. of overnight visitors (Quarter 4)

<table>
<thead>
<tr>
<th>Category</th>
<th>No. of Visitors</th>
</tr>
</thead>
<tbody>
<tr>
<td>Holiday</td>
<td>157,193</td>
</tr>
<tr>
<td>VFR</td>
<td>76,995</td>
</tr>
<tr>
<td>Business</td>
<td>11,599</td>
</tr>
<tr>
<td>Other</td>
<td>2,377</td>
</tr>
</tbody>
</table>

248,164 overnight visitors, down 1% compared to this time last year

150,127 day visitors, up 2% compared to this time last year

Overview trips dominated by leisure/ holiday trips (63%). Overnight VFR trips up 9% but a large increase in ‘other purpose’ trips compared to this time last year.

No. of day visitors (Quarter 4)

<table>
<thead>
<tr>
<th>Category</th>
<th>No. of Visitors</th>
</tr>
</thead>
<tbody>
<tr>
<td>Leisure day visitor</td>
<td>56,648</td>
</tr>
<tr>
<td>VFR</td>
<td>35,556</td>
</tr>
<tr>
<td>Business</td>
<td>48,099</td>
</tr>
<tr>
<td>Other</td>
<td>9,825</td>
</tr>
</tbody>
</table>

Leisure day trips are the most common purpose for day trips in Quarter 4 (38%), closely followed by business day trips (32%). Leisure day trips were up 5% compared with Q4 last year.

Increase in first time visitors compared to this time last year.

<table>
<thead>
<tr>
<th>Year</th>
<th>% of new visitors</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013</td>
<td>8.6</td>
</tr>
<tr>
<td>2014</td>
<td>8.9</td>
</tr>
<tr>
<td>2015</td>
<td>8.7</td>
</tr>
<tr>
<td>2016</td>
<td>9.3</td>
</tr>
</tbody>
</table>

% of new visitors during Q4 (2013-2016)

Around 31,300 new visitors for this quarter (9% of all leisure visitors).

295,700 new visitors overall for the last 12 months, down 2% compared with the previous 12 months.

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Visitor profile and trip features: Quarter 4

- 32% from Hampshire
- 8% from London area
- 24% from elsewhere in South East
- 29% from elsewhere in UK
- 6% of visitors from overseas

32% visited one or more of the Island’s paid for or free visitor attractions during Quarter 4 (34% over the same quarter last year)

1. 58% of overnight visitors spent 1-4 nights on their stay in Q4. This is similar to the proportion seen last year (57%). The average length of stay for all types of overnight trips was 3.79 nights, slightly shorter than last year (4.85 nights).

2. Around a third (32%) of all leisure visitors visited one or more of the Island’s formal visitor attractions (e.g. museums and theme parks during Quarter 4); slightly lower than the proportion visiting over the same period last year (34%).

3. 51% of total bednights on the Island during Quarter 4 involved staying in paid for accommodation.

4. The vast majority of visitor groups were made up of adults only (86%). The average group size was 2.45 people (2.20 people this time last year).

5. On average, a day visitor spent £21.62 on their trip during Q4 and an overnight visitor spent £147.26 (per person per trip).

Average length of stay of 3.8 nights
Total bednights on the Island during Q4 - 953,900

Distribution of short and longer trips among overnight visitors
- 58% of overnight visitors stayed 1-4 nights
- 42% of overnight visitors stayed 5 or more nights

Average group size 2.45 people
86% of visitors are in groups of adults only
- 32% visited alone
- 40% visited in party of 2 people
- 28% visited in party of 3 or more people

Car (own vehicle) main form of transport used on Island (60%)

Main mode of transport used on the Island (%)
- Car (own) 60
- Bus/ train 8
- Walking/ on foot 10
- Transport provided by friends/relatives 7
- Bicycle 1
- Coach 7
- Taxi 6

Accommodation used by overnight visitors
- 30% of all overnight visitors stayed in a hotel, guest house or B&B compared to 48% of holiday makers
- 51% of all overnight visitors stayed in the home of a friend/relative or a second home compared to 20% of holiday makers
- 12% of all overnight visitors stayed in rented cottage, static caravan or chalet compared to 24% of holiday makers
- Less than 1% of all overnight visitors camped or stayed in a touring caravan
- Less than 1% of all overnight visitors stayed onboard a boat however 2% stayed in sailing club accommodation

Day visitor avg. spend per trip
£21.62 per day

Overnight visitor avg. spend per trip
£147.26 per trip