Tourism trends bulletin
Visitor statistics for Spring 2014 (Easter to mid July)

Introduction

This bulletin provides the key findings of the Isle of Wight Tourism Monitor for the pre-peak period covering 31 March to 13 July 2014 (Period 2). This period includes the Easter bank holidays and school holiday, and continues through to just before the start of the summer peak season. It includes the two bank holiday weekends in May, the school spring half term holiday (late May) and the Isle of Wight Festival (June).

Variations in the timing of Easter each year result in analysis periods of different durations (typically between 15 and 17 weeks). The Period 2 analysis period this year was 15 weeks duration, compared with 16 weeks in 2013 (15 weeks in 2012 and 2011).

The findings in this bulletin are based on face-to-face interviews carried out among a sample of just over 4,100 passengers on board the six ferry routes to the island. Passenger numbers are provided by the ferry companies.

Headlines

- The second reporting period of 2014 followed on from a relatively quiet Period 1 this year, characterised by periods of stormy weather in January and February. The weather during Period 2 has been fairly typical for the time of year, although June and July have been warmer, drier and sunnier than in recent years.

- Of the 1,396,300 passengers making return trips across the Solent during Period 2, 58% were visitors to the Island from other parts of the UK and overseas.

- Among visitors, domestic overnight trips accounted for 64% of all visitor trips to the Island during Period 2 (521,930 trips) while domestic day trips accounted for 31% of all visitor trips to the Island (249,407 trips). The remaining 5% of visitor trips involved visitors from overseas (40,020 trips).

- Compared with Period 2 in 2013, total passenger carrying figures (all six routes combined) were down 4% and total visitor trips were down 1.5%, however, this is mainly due to the analysis period being one week shorter this year than in 2013 due to the varied timing of Easter each year. Domestic day trips were down 7.5%, however domestic overnight trips increased by 5%.

- Domestic holiday trips were up 9% compared with the same period last year, and in a reversal of the trend seen in recent years, a higher proportion of domestic holiday trips were longer holidays of 5+ nights (accounting for 28% of all domestic holiday trips).

- It is estimated that visitors to the Island contributed around £105 million direct visitor spend to the local economy during Period 2 this year. Total visitor expenditure this period increased by 8% (£7.56 million) compared with Period 2 in 2013, mainly due to a higher average spend per trip among domestic overnight visitors this spring.

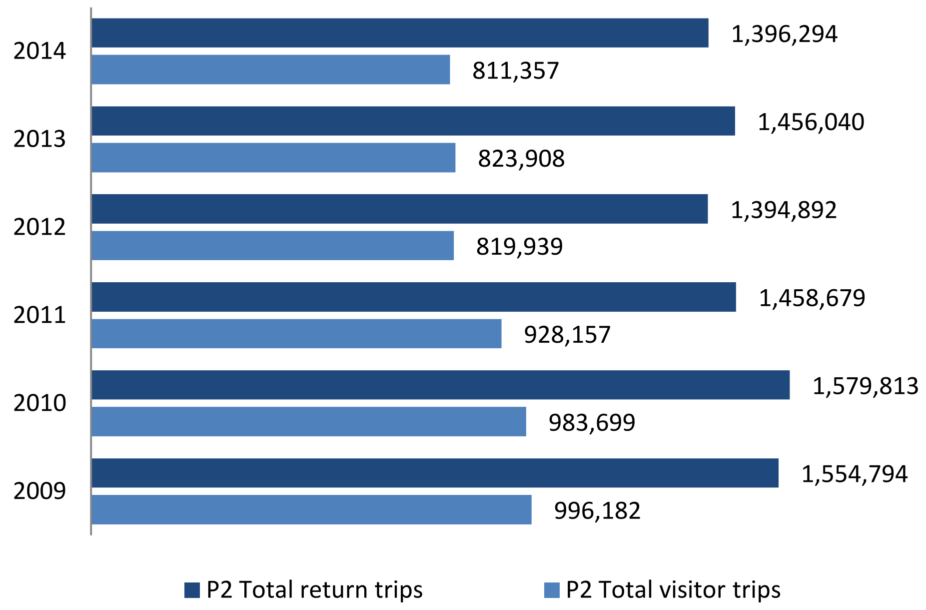
- Over the twelve months up to the end of Period 2 in 2014, trips were down 2% compared with the previous twelve months (domestic overnight trips up 3% and domestic day trips down 7%), however, it is estimated that visitors spent almost £280 million on the Island, an increase of 6% compared with £265 million visitor spend in the twelve months up to the end of Period 2 in 2013.

Volume of tourism trips to the Isle of Wight

<u>All tourism trips</u>

Ferry passenger figures reveal that a total of 1,396,300 return trips (Island residents and visitors combined) were made across the Solent during the second reporting period of 2014. Overall passenger volumes were down 4% compared with the (one week longer) period 2 in 2013, but similar to Period 2 in 2012 which was also 15 weeks duration.

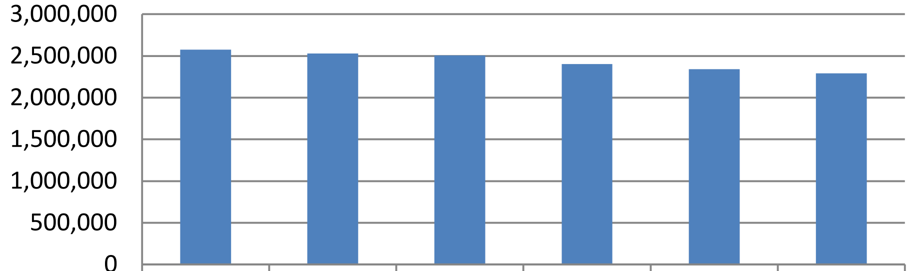
**Figure 1: Total visitors to the Isle of Wight
Period 2 2014 vs previous years**



Based on the ferry passenger survey data, it is estimated that 58% of all return trips (811,400 trips) were made by visitors to the Island during Period 2 of 2014. This is consistent with findings for period 2 in 2013 (57%) and 2012 (59%). Visitor trips were down 1.5% (12,500 visitor trips) compared with Period 2 last year and down 1% (8,600 visitor trips) compared with Period 2 in 2012.

When visitor figures for Period 2 of 2014 are added to those for the previous three reporting periods, the rolling total for the year was slightly lower than previous years at just under 2.3 million visitors (down 2% compared with the year ending P2 2013).

Figure 2: Total visitor numbers -
12 months rolling total to end of Period 2



	2009	2010	2011	2012	2013	2014
12 months rolling total	2,573,980	2,528,504	2,507,238	2,403,697	2,342,326	2,291,480

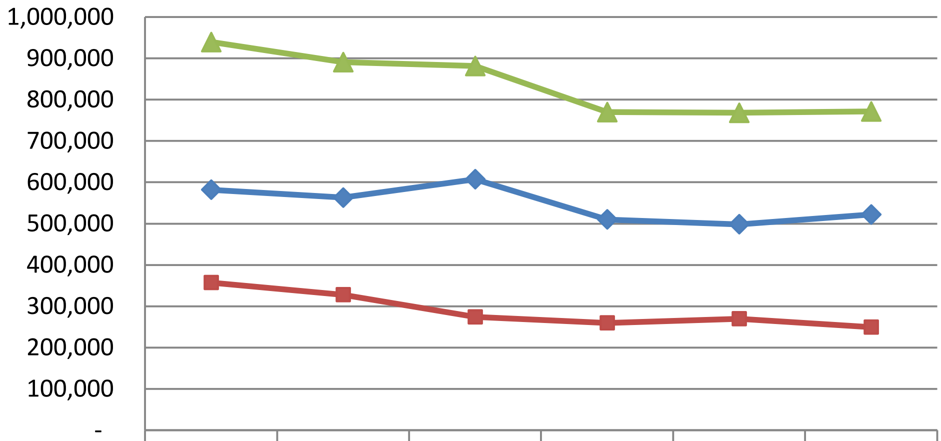
Domestic visitors

In common with previous years, the majority of visitors to the Island this spring were domestic visitors (95%).

There were an estimated 771,300 domestic visitor trips during Period 2, of which 521,900 (68%) were staying overnight on the Island and 249,400 (32%) were day visitors, either visiting from their home and returning home the same day, or making a day trip to the Island while staying elsewhere.

As shown in Figure 3, the volume of domestic trips during Period 2 this year was consistent with the same period in 2013 and 2012, although domestic visitor volumes remain relatively low compared with figures for this period prior to 2012.

Figure 3: Domestic visitor volumes
Period 2 2014 vs previous years



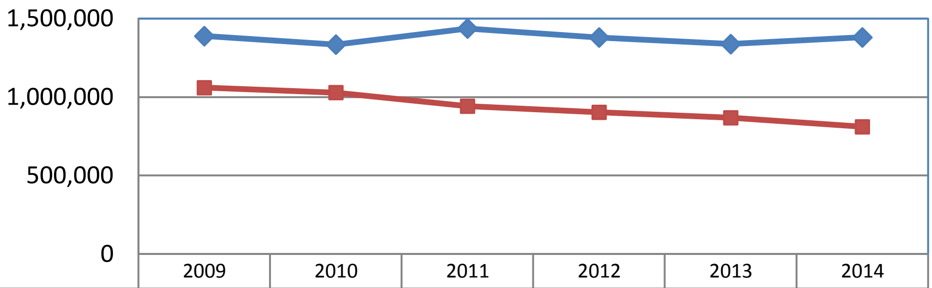
	2009	2010	2011	2012	2013	2014
Domestic overnight visitors	582,062	562,847	607,368	510,117	498,431	521,930
Domestic day visitors	357,295	327,954	274,066	259,689	269,718	249,407
All domestic visitors	939,357	890,801	881,434	769,806	768,149	771,337

Domestic overnight trips were up 5% compared with the same period in 2013, while domestic day trips decreased by 7.5%.

Although domestic overnight trips have shown some variation in volumes year on year, domestic day trip volumes have been steadily declining. This has been noticeable not only during the spring reporting period, but also at other times of the year.

Aggregated trip volumes for the twelve months up to the end of Period 2 this year indicate that domestic overnight trips were up 3% compared with the twelve months ending Period 2 in 2013, while domestic day trips fell by 7% over the same period (Refer to Figure 4 overleaf).

Figure 4: Total domestic overnight & day visitors
12 months rolling total



	2009	2010	2011	2012	2013	2014
Domestic overnight 12 months rolling total (to end of P2)	1,388,075	1,334,194	1,436,591	1,379,517	1,337,050	1,379,788
Domestic day 12 months rolling total (to end of P2)	1,059,614	1,028,571	941,947	903,132	868,027	810,535

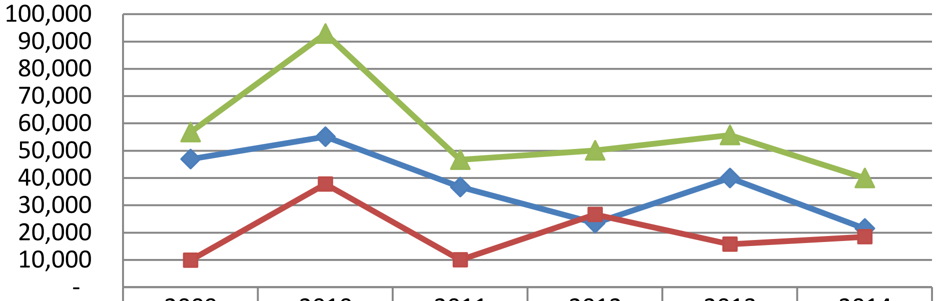
<u>Overseas visitors</u>

In common with previous years, around 5% of total visitor trips during the Period 2 of 2014 were made by overseas residents (40,000 overseas visitor trips).

Of the total trips to the Island by overseas residents this period, 21,500 overseas visitor trips involved an overnight stay of at least one night (54%), while 18,500 overseas visitor trips were day trips (46%).

The volume of overseas visitor trips during Period 2 this year was well below figures for the same period in 2013, and relatively low compared with 2012 and 2011 (Figure 5). However, it is worth remembering that overseas visitors represent a relatively small part of the overall visitor market, and the figures are based on relatively small sample sizes.

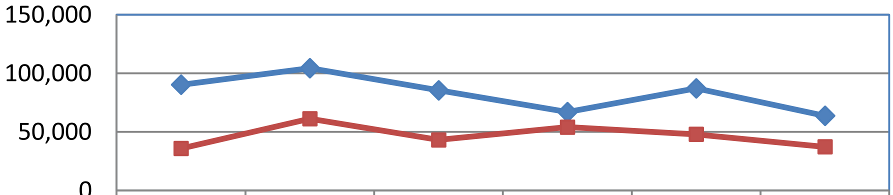
Figure 5: Overseas visitor volumes
Period 2 2014 vs previous years



	2009	2010	2011	2012	2013	2014
Overseas overnight visitors	46,928	55,119	36,677	23,484	39,982	21,519
Overseas day visitors	9,896	37,779	10,046	26,649	15,776	18,501
All overseas visitors	56,824	92,898	46,723	50,133	55,758	40,020

As shown in Figure 6, the aggregated total for the 12 months ending with Period 2 in 2014 indicates a decrease in total overseas visitor trips of around 25% compared with the previous 12 months (overseas overnight trips down 27%, overseas day trips down 22%).

Figure 6: Total overseas overnight & day visitors
12 months rolling total (to end of P2)



	2009	2010	2011	2012	2013	2014
Overseas overnight 12 months rolling total	90,363	104,452	85,509	66,952	87,220	63,811
Overseas day 12 months rolling total	35,927	61,287	43,191	54,097	48,028	37,347

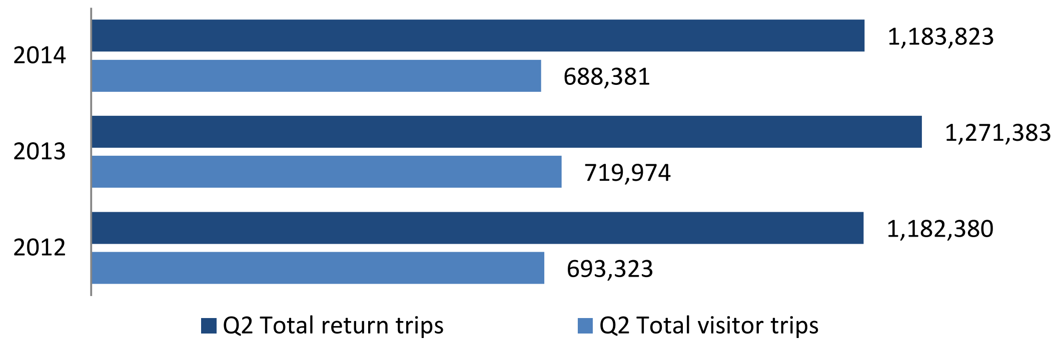
Analysis of visitor volumes for Period 2 excluding the IOW Festival period

Looking at Period 2 over the last three years excluding the two week period covering the Isle of Wight Festival [1], total trips (residents and visitors combined) in 2014 was similar to results for this period in 2012 (+0.1%) but down by 7% compared with the same period last year. However, the figures needs to be reviewed against the context that Period 2 in 2013 was a week longer than the same period in 2012 and 2014. This should also be noted in the results presented in figures 7a and 7b.

A similar pattern is seen for visitor trips (excluding residents), visitor trips down 1% compared with Period 2 in 2012 and down 4% compared with Period 2 of 2013 (taking into account the extra week length of Period 2 in 2013).

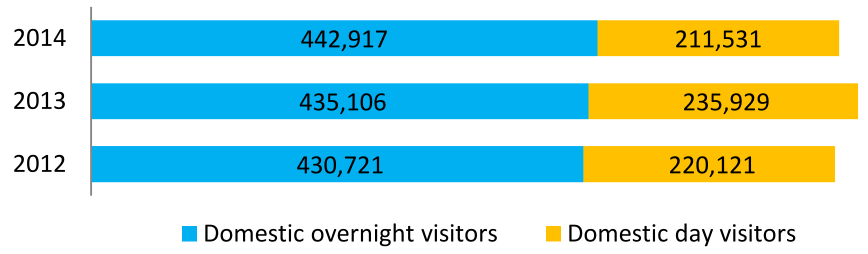
[1] Passenger volumes over the two week period 9-22 June 2014, 10-23 June 2013 and 18 June to 1 July 2012 (inclusive) were excluded from the Period 2 analysis. The adjusted period 2 in 2014 and 2012 covered 13 weeks, while 2013 covered 14 weeks.

Figure 7: Total visitors to the Isle of Wight
P2 2014 vs P2 in 2013 & 2012 (excl. IOW Festival period)



Domestic overnight trips during Period 2 (excluding the Festival period) were up 3% compared with 2012 and up 2% compared with 2013. However, domestic day trips were down 10% compared with Period 2 in 2013 and down 4% compared with this period in 2012 (Figure 7a).

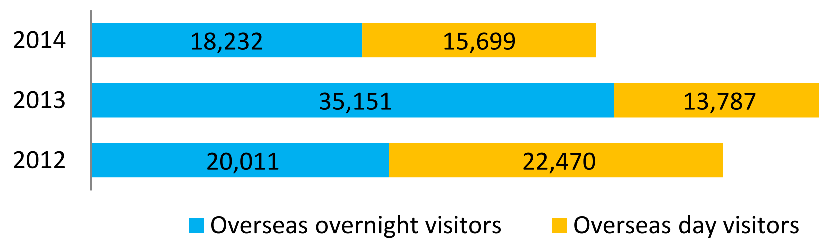
Figure 7a: Domestic Visitor Volumes
P2 2014 vs P2 in 2013 & 2012 (excl. IOW Festival period)



Total domestic visitor trips during Q2 (excluding the Festival period) were down 3% compared with Period 2 in 2013, but up 1% compared with 2012.

As shown in Figure 7b, total overseas visitor trips during Q2 of 2014 (excluding the Festival period) were well below the volumes seen in 2013 and 2012.

Figure 7b: Overseas Visitor Volumes
P2 2014 vs P2 in 2013 & 2012 (excl. IOW Festival period)



Changes in visitor volumes during Period 2 (both including and excluding the Isle of Wight Festival period) are summarised in Table 1 overleaf.

Table 1: Comparison of trip volumes during Period 2 (2014 compared with 2013 and 2012)				
	2014 compared with 2013		2014 compared with 2012	
	P2 (incl Festival)	P2 (excl Festival)	P2 (incl Festival)	P2 (excl Festival)
Total trips (visitors and residents combined)	-4.1%	-6.9%	-1.0%	+0.1%
Total VISITOR trips	-1.5%	-4.4%	+0.1%	-0.7%
Total domestic trips	+0.4%	-2.5%	+0.2%	+0.6%
Domestic overnight trips	+4.7%	+1.8%	+2.3%	+2.8%
Domestic day trips	-7.5%	-10.3%	-4.0%	-3.9%
Total overseas trips	-28%	-31%	-20%	-20%
Overseas overnight trips	-46%	-48%	-8%	-9%
Overseas day trips	+17%	+14%	-31%	-30%

Home residence

Tables 2a to 2c show the top ten counties or countries of origin for domestic and overseas visitors. Hampshire continues to be the most important county for generating domestic day trips. Over half of all domestic day visitors during Period 2 came from home locations within Hampshire (53%).

The top three places generating domestic overnight trips were Hampshire (17%), Greater London (10%) and Surrey (8%). As usual, the home locations of overnight visitors tended to be more widely distributed across the UK than those of day visitors.

The most frequently mentioned countries of residence for visitors from overseas are shown in Table 2c. Results are based on relatively small samples and are therefore subject to significant fluctuations year on year. Thirty three different countries were represented within the overseas visitor sample for Period 2, although many of them generate only small numbers of visitors. Germany, Australia and the USA accounted for the highest proportion of overseas visitors to the Island during Period 2 of 2014 and continue to feature consistently among the most frequently recorded countries of origin.

Table 2a: Top 10 county of residence – domestic overnight visitors		
	2014	2013
Hampshire	17%	16%
Greater London	10%	12%
Surrey	8%	9%
Kent	5%	7%
West Sussex	5%	5%
Essex	4%	4%
West Midlands	4%	3%
Dorset	4%	3%
Hertfordshire	4%	2%
Berkshire	3%	3%

Table 2b: Top 10 county of residence – domestic day visitors		
	2014	2013
Hampshire	53%	55%
West Sussex	7%	5%
Dorset	6%	7%
Surrey	6%	6%
Greater London	5%	4%
Kent	2%	2%
Wiltshire	2%	2%
Essex	2%	2%
Somerset/ Bristol	2%	2%
Berkshire	1%	3%

Table 2c: Top 10 country of residence – all overseas visitors		
	2014	2013
Germany	12%	13%
Australia	9%	8%
U.S.A	8%	12%
France	7%	10%
Italy	7%	3%
Belgium	5%	2%
Republic of Ireland	5%	8%
Netherlands	4%	7%
Canada	4%	2%
New Zealand	4%	3%

Group composition

Visitors groups during Period 2 were most likely to consist of people either visiting alone (34%) or in a party of two adults (38%). While the results are broadly consistent with the same period in recent years, the average group size among all visitor groups has decreased in recent years (2.41 people compared with 2.56 people this period in 2013 and 2.48 people this period in 2012) and fewer visitor groups included children

(11% compared with 17% during Period 2 of 2013 and 2012). This may be related to the Government taking a firmer stance in regard to children being taken out of school for holidays during term time.

Figure 8: Number of people in group

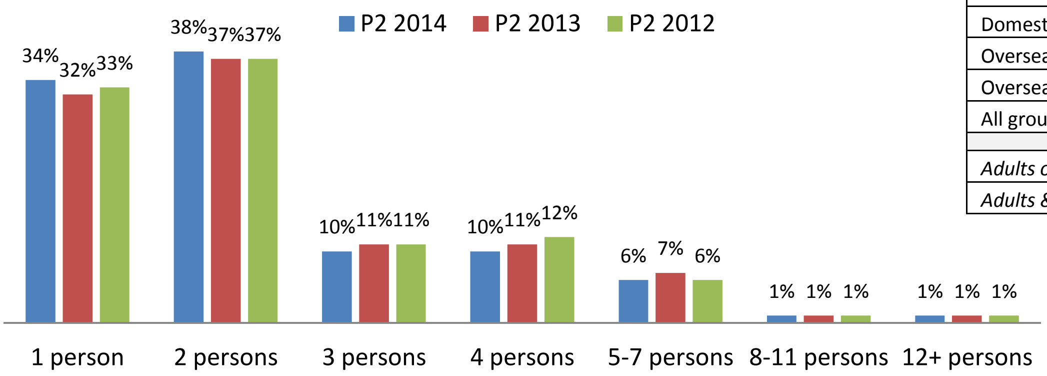


Table 3: Average group size P2 2014	
Domestic overnight trips	2.60
Domestic day trips	2.10
Overseas overnight trips	2.27
Overseas day trips	3.55
All groups	2.41
Adults only	*89%*
Adults & children	*11%*

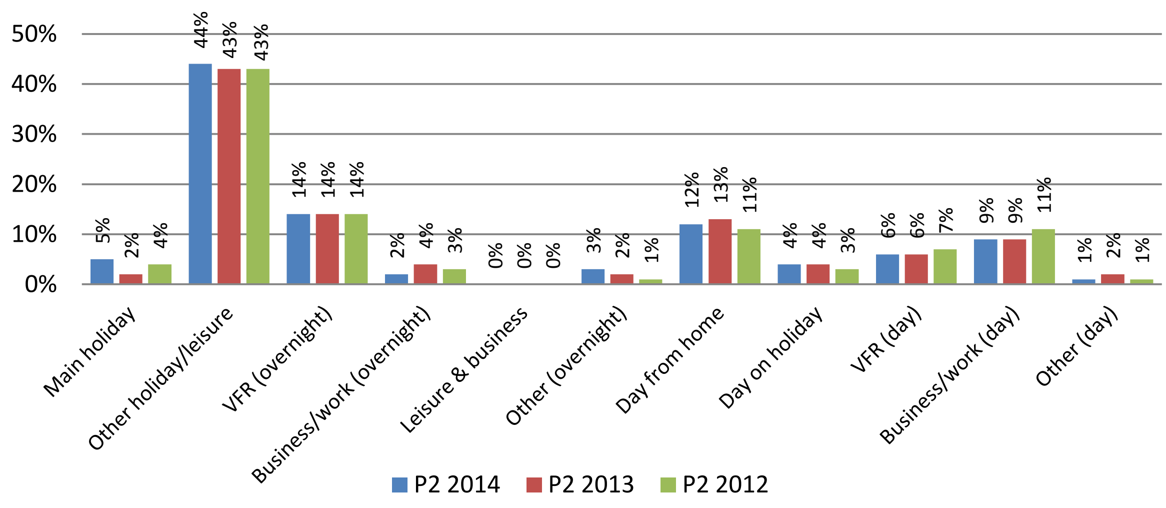
Purpose of visit

Although domestic trip volumes and domestic day trips in particular were down during Period 2 of 2014, the distribution of domestic visitor trips to the Island by purpose of visit showed relatively little variation overall compared with the same period in 2013 and 2012.

Results for this period typically include a significant number of short breaks and holidays taken as a supplement to the main holiday of the year. Supplementary holiday trips accounted for around 337,300 domestic trips during Period 2 this year (44% of all domestic trips), while overnight trips to visit friends or relatives accounted for a further 106,200 trips (14% of all domestic trips).

Leisure day trips from home (89,800 trips) and same day business/ work trips (71,500 trips) accounted for the highest proportion of domestic day trips (12% and 9% of all domestic trips respectively), while 6% of all domestic trips were same day VFR trips (46,500 trips).

Figure 9a: Domestic trips by purpose (% of all domestic trips to IOW) Period 2 2014 vs Period 2 in 2013 and 2012

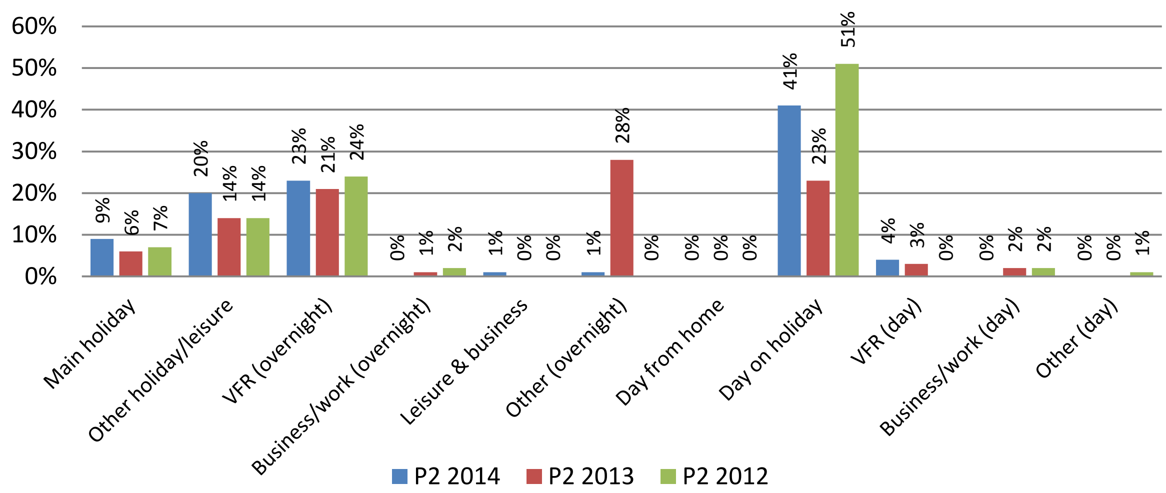


Although the changes in the percentages of each visitor type are fairly subtle in Figure 9a, domestic holiday trips increased by 9% (32,700 trips) compared with Period 2 in 2013 and increased by 3% (11,000 trips) compared with Period 2 in 2012. Categories which saw the largest falls in visitor volumes included overnight business/ work trips (down from 29,200 trips in period 2 of 2013 to 15,100 trips in period 2 this year) and leisure day trips from home (around 11,700 fewer trips compared with the same period in 2013).

Year on year comparison of the profile of overseas visitor trips is complicated by an exceptionally high proportion of visitor trips during period 2 in 2013 that were ‘other’ overnight visits (typically groups travelling to the Island for educational visits involving an overnight stay). The relatively small sample base for overseas visitors to the Island has the potential for a small number of groups to have a disproportionate effect on the profile of the overseas visitor sample.

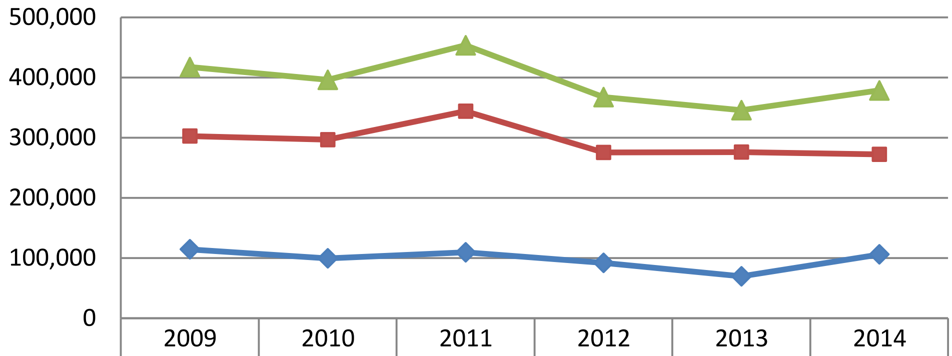
As shown in Figure 9b (overleaf), leisure day trips from accommodation bases on the mainland accounted for the highest proportion of overseas visitor trips during Period 2 of 2014 (41% of all overseas trips). Overnight VFR trips accounted for 23% of overseas trips, while almost a third of all overseas visitor trips were staying holiday trips (29%). The volume of overseas holiday trips during Period 2 this year was similar to the same period in 2013 and 2012 (11,500, 11,500 and 10,400 trips respectively), however, overnight VFR trips were down by around 2,500 trips compared with Period 2 in 2013 and 2012 (9,200 trips in Period 2 this year compared with 11,800 and 11,900 during period 2 in 2013 and 2012).

Figure 9b: Overseas trips by purpose (% of all overseas trips to IOW)
Period 2 2014 vs Period 2 in 2013 and 2012



As shown in Figure 10a, there were an estimated 378,500 domestic holiday trips to the Island during Period 2 of 2014 (combining ‘main holiday’ and ‘other holiday/leisure’ purpose trips), of which 72% were short breaks of 1-4 nights (272,300 trips) and 28% were longer holidays of 5+ nights (106,100 trips). Domestic holidays were up 9% overall compared with the same period last year and up 3% compared with Q2 during 2012, mainly due to an increase in the number of longer holiday trips to the Island this spring. The improving economic outlook and settled weather over much of the spring may have contributed to this increase.

Figure 10a: Total domestic holiday trips to IOW
1-4 nights and 5+ nights
Period 2 2014 vs Period 2 in previous years



	2009	2010	2011	2012	2013	2014
Domestic long holiday (5+ nights)	114,628	99,549	109,518	92,004	69,631	106,147
Domestic short holiday (1-4 nights)	302,744	296,641	343,993	275,470	276,129	272,344
All domestic holidays	417,372	396,190	453,511	367,474	345,760	378,490

As shown in Table 4 (overleaf), short breaks of 1-4 nights accounted for around half (52%) of all domestic overnight trips (including non-holiday trips) during Period 2 this year, while longer holiday trips of 5+ nights accounted for around 20% of all domestic overnight trips.

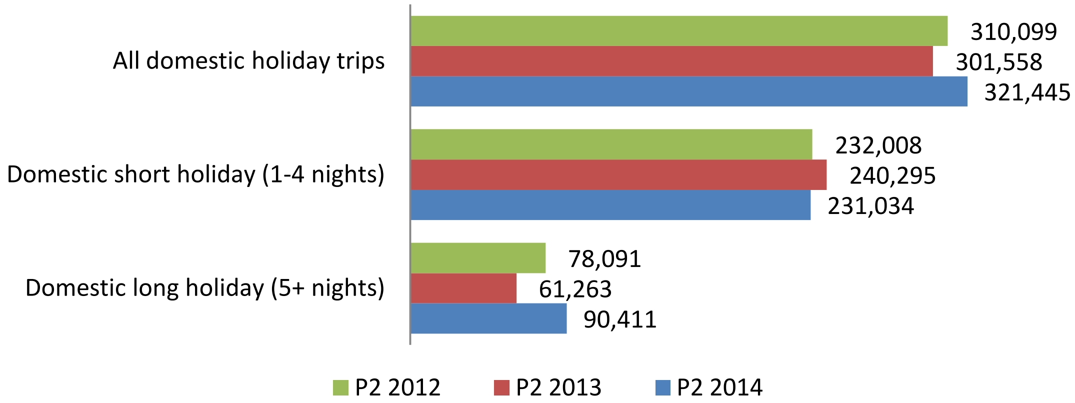
The split between short and longer holiday trips is broadly consistent with results from recent years, however, domestic longer holidays (5+ nights) have increased as a proportion of all domestic overnight trips this spring, while domestic shorter holidays (1-4 nights) have shown a slight decline. This contrasts with recent trends for the Isle of Wight and England as a whole (from the national tourism surveys) which have shown a trend away from longer holidays towards more frequent short breaks in recent years.

Table 4: Domestic long/ short holiday trips during Period 2

	Domestic LONG holiday trips (5+ nights)	% of all domestic holiday trips	% of all domestic o'night trips	Domestic SHORT holiday trips (1-4 nights)	% of all domestic holiday trips	% of all domestic o'night trips
2009	114,628	27%	20%	302,744	73%	52%
2010	99,549	25%	18%	296,641	75%	53%
2011	109,518	24%	18%	343,993	76%	57%
2012	92,004	25%	18%	275,470	75%	54%
2013	69,631	20%	14%	276,129	80%	55%
2014	106,147	28%	20%	272,344	72%	52%

Looking at Period 2 in 2014, 2013 and 2012 excluding the two week period around the Isle of Wight Festival (see figure 10b overleaf), domestic holiday trips this spring were up 7% compared with Period 2 in 2013 and up 4% compared with period 2 in 2012. The increase in domestic holiday trips appears to be driven by a significant increase in longer holiday trips this spring, since short breaks of 1-4 nights were down 4% compared with the spring of 2013, and similar to figures for this period in 2012.

Figure 10b: Domestic Long/Short Holiday Trips
P2 2014 vs P2 in 2013 & 2012 (excl. IOW Festival period)

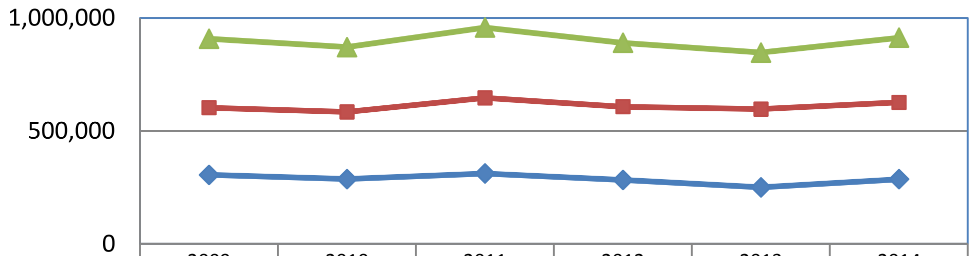


Returning to the full reporting period, in the twelve months up to the end of Period 2 in 2014, the overall number of domestic holiday trips was up 8% compared with the previous twelve months at 912,800 trips, and compares favourably with results over the last five years.

Domestic short breaks (1-4 nights) accounted for 626,000 trips over the year, an increase of 5% on the previous 12 months, mainly as a result of exceptionally high visitor numbers during the peak summer period last year.

Domestic longer holidays of 5+ nights accounted for 286,600 trips over the twelve months to the end of Period 2 this year, an increase of 15% compared with the previous twelve months, but returning to levels last seen in the twelve months ending with period 2 in 2012 (Figure 11).

Figure 11: Total domestic long & short break visitors
12 months rolling total (to end of Period 2)



	2009	2010	2011	2012	2013	2014
Domestic long holiday (5+ nights)	305,234	286,710	311,711	283,004	250,084	286,639
Domestic short holiday (1-4 nights)	602,642	583,896	646,055	607,199	596,495	626,165
All domestic holidays	907,876	870,606	957,766	890,203	846,579	912,804

Length of stay

Based on the results of the passenger survey, domestic visitors staying overnight on the Isle of Wight spent an average of 4.1 nights on the Island during their trip in Period 2 of 2014. The results are broadly consistent with previous years (Table 5a), although the average trip duration for ‘all domestic overnight trips’ was slightly longer than it has been over the same period in 2013 and 2012.

Overseas overnight visitors stayed for an average of 6.8 nights during their trip in Period 2 this year.

Table 5a: Average length of stay (nights) Domestic overnight visitor trips during Period 2						
	2009	2010	2011	2012	2013	2014
Main holiday	7.9	6.7	7.2	7.2	7.9	6.8
Other holiday/leisure	3.8	3.9	4.0	3.8	3.6	3.9
VFR	3.1	3.1	3.1	3.1	3.3	3.5
Business/conf/work	9.3	2.1	5.7	5.0	3.9	5.4
Leisure & business	1.8	2.3	(2.9)	3.1	2.9	2.8
Other	3.4	2.0	2.9	1.8	2.7	3.2
Avg. all domestic trips	4.0	3.7	4.1	3.8	3.7	4.1

Table 5b: Average length of stay (nights) Overseas overnight visitor trips during Period 2						
	2009	2010	2011	2012	2013	2014
Avg. all overseas trips	5.5	5.2	7.1	6.8	5.8	6.8

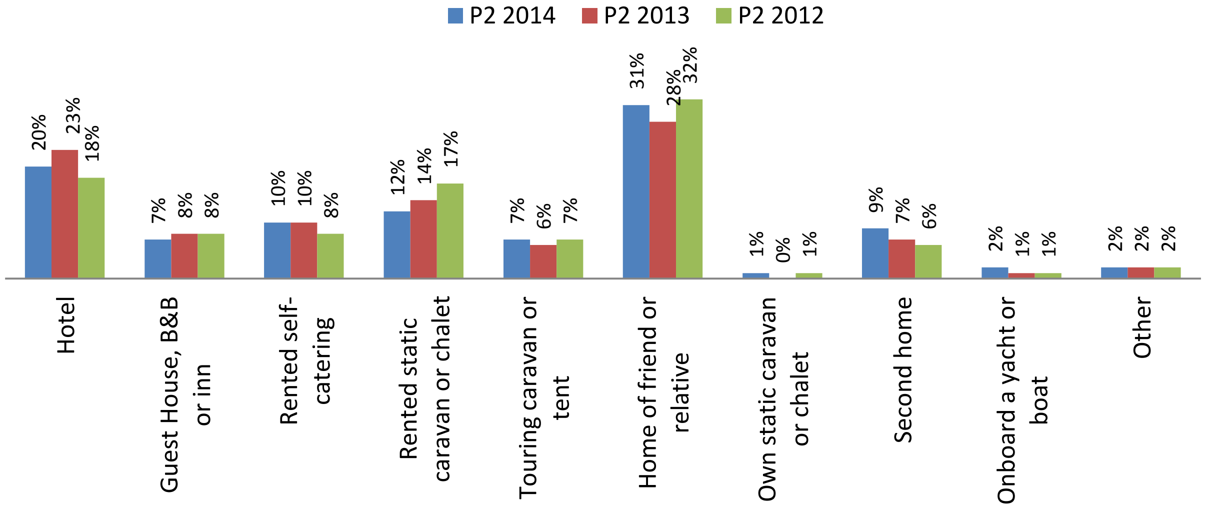
NB: small sample sizes for some categories. Averages based on less than 10 visitor groups are shown in brackets.

Type of accommodation used

Among all visitor staying overnight on the Island this spring, the highest proportion were staying in the home of a friend or relative (31%), while 20% were staying in a hotel and 12% were based in a rented static caravan or chalet. Smaller numbers of overnight visitors were using other types of accommodation such as rented self-catering (10%), second homes (9%), guest houses or B&Bs (7%) or touring caravans or camping (7%).

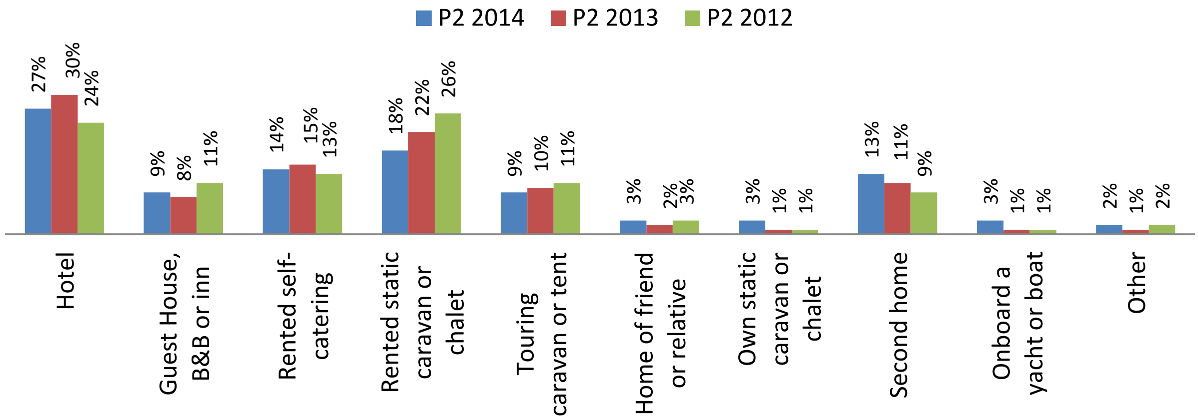
The results are consistent with the spring of last year, although a slightly higher proportion were staying with friends or family or in second homes on the Island, and slightly fewer overnight visitors were using serviced accommodation or staying in rented static caravans and chalets.

Figure 12a: Accommodation type used by overnight visitors Period 2 2014 vs Period 2 in 2013 and 2012



Looking at the sub-group of staying visitors who were visiting the Island for short breaks or holidays during Period 2, the most popular accommodation types were hotels (27%), rented static caravans or chalets (18%) and rented self-catering accommodation (14%). Second homes (13%), touring caravans/ tents (9%) and guest houses/ B&Bs also remained popular (9%)(Figure 12b).

Figure 12b: Accommodation type used by short break & longer holiday visitors Period 2 2014 vs Period 2 in 2013 and 2012



The accommodation choices among domestic and overseas visitors are shown in Table 6. Both domestic and overseas visitors were most likely to be staying in the home of a friend or relative. This includes most of those visitors who stated that their main trip purpose was visiting friends and relatives (VFR trips) but also some visiting for business/work or other trip types who were using the homes of friends or relatives as a base.

Table 6: Domestic & overseas visitor accommodation

	Domestic visitors	Overseas visitors
Base:	1099	66
Hotel	20%	23%
Guest House/B&B	7%	12%
Rented self-catering	10%	6%
Static caravan/chalet	14%	-
Touring caravan/tent	7%	3%
Home of friend/relative	30%	48%
Second home	9%	5%
On board a yacht/boat	2%	2%
Other (i.e. hostels, lodgings)	2%	2%

Table 7: Accommodation used by purpose of trip (Period 2 2014)

	Main holiday	Other holiday	VFR	Bus/ work	Other
Base:	104	640	345	60	16
Hotel	26%	28%	2%	30%	44%
Guest House/B&B	8%	10%	2%	5%	25%
Rented self-catering	24%	13%	1%	7%	-
Static caravan/ chalet	31%	17%	-	8%	-
Touring caravan/tent	6%	9%	0%	17%	6%
Home of friend/relative	1%	3%	95%	10%	6%
Second home	2%	15%	-	2%	-
On board a yacht/boat	1%	3%	-	7%	-
Other (i.e. hostels, lodgings)	2%	2%	-	15%	19%

The average trip duration by accommodation type for Period 2 of 2014 was broadly consistent with the same period over the last two years for most accommodation types, although there has been some variation year on year.

Table 8: Average length of stay by accommodation type (Period 2)

(nights)	2014	2013	2012
Hotel	3.5	3.3	3.5
Guest House/B&B	3.5	2.9	3.4
Rented self-catering	6.4	4.9	5.5
Static caravan/chalet	4.8	4.2	4.3
Touring caravan/tent	5.0	4.6	4.1
Home of friend/relative	4.0	3.7	3.5
Second home	5.0	3.9	4.6
On board yacht/boat	1.8	2.8	2.2
Other (i.e. hostels, lodgings)	4.9	4.8	4.2

Table 9 (overleaf) shows the number of overnight trips (by purpose of visit) which were based in each of the different types of accommodation during Period 2 of 2014. From this table it can be seen that an estimated 123,587 overnight visitor trips during the spring period of 2014 were accommodated in hotels on the Island, the majority of which (107,118 trips) were holiday trips.

Once the estimated total trips for each accommodation type are multiplied by the average length of stay for visitors using that accommodation type, it is estimated that around 2,367,000 visitor nights were spent on the Island during Period 2 this year, of which around 436,900 visitor nights were spent in hotels.

Table 9: Estimated trips & nights by accommodation type (Period 2)

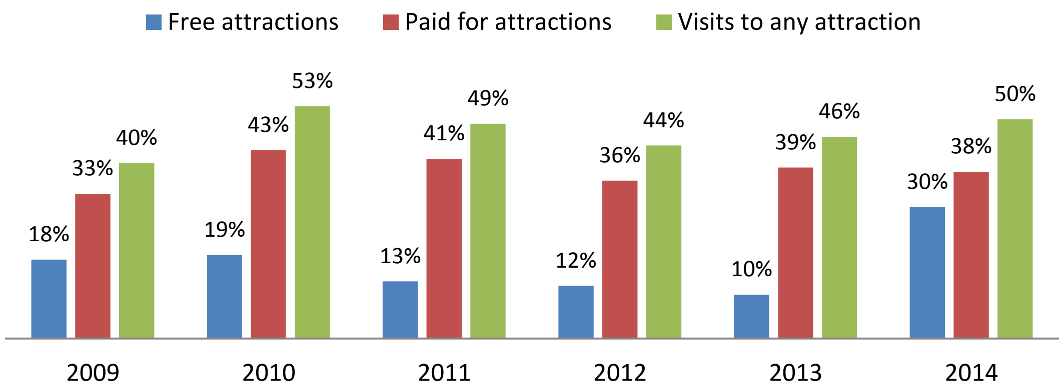
	Main holiday	Other hol/ leisure	VFR	Business	Business & leisure	Other trips	Estimated total trips	Estimated total nights
Total trips by purpose of visit	44,873	345,150	115,433	15,334	2,927	19,731	543,448	2,367,161
Hotel	11,649	95,468	2,343	4,695	798	8,632	123,587	436,901
Guest House/B&B	3,451	32,893	2,678	938	-	4,933	44,893	156,344
Rented self-catering	10,787	43,696	670	1,251	-	-	56,404	358,211
Rented static caravan/chalet	12,080	56,639	-	1,564	-	-	70,283	331,833
Touring caravan/tent	2,589	31,823	335	3,130	-	1,233	39,110	195,740
Home of friend/relative	431	11,873	109,407	626	1,064	1,233	124,634	501,211
Second home	862	52,325	-	313	-	-	53,499	266,848
Own static caravan/ chalet	1,728	3,762	-	-	-	-	5,460	30,593
On board yacht/boat	431	10,251	-	313	798	-	11,793	21,578
Other (i.e. hostels, lodgings)	862	6,489	-	2,504	266	3,700	13,786	67,901

Visits to Island attractions

The survey found that half of all leisure visitors[2] had visited one or more attractions on the Island during their visit this spring. This reflects a modest increase compared with Period 2 over the last two years (Figure 13), and a significant improvement compared with Period 1 this year, when attraction visits appeared to be exceptionally low, even for the quietest part of the year.

Twenty percent of leisure visitors had visited paid-for attractions only, while 12% had visited free attractions only. Eighteen percent had visited both free and paid-for attractions during their visit.

Figure 13: Visits to Island attractions
Period 2 2014 vs Period 2 in previous years



As shown in Table 10 (overleaf), similar proportions of day and staying visitors had visited one or more attractions on the Island during Period 1.

[2] Excludes those visiting for business/ work or combined business and leisure trips

Table 10: Visits to attractions by visitor type, Period 2 2014						
	All leisure visitors	Domestic visitors	Overseas visitors		Overnight visitors	Day visitors
Visit to any attraction, of which:	*50%*	*49%*	*65%*		*59%*	*35%*
Free only	12%	11%	17%		11%	13%
Paid for only	20%	20%	26%		25%	12%
Both free and paid for	18%	18%	22%		24%	9%
Did not visit any attractions	*50%*	*88%*	*35%*		*41%*	*65%*

Overseas visitors were much more likely to have visited one or more attractions during their visit this spring than domestic visitors, although in Period 2 of 2013 and 2012 relatively little difference was found in attraction visits between domestic and overseas visitors.

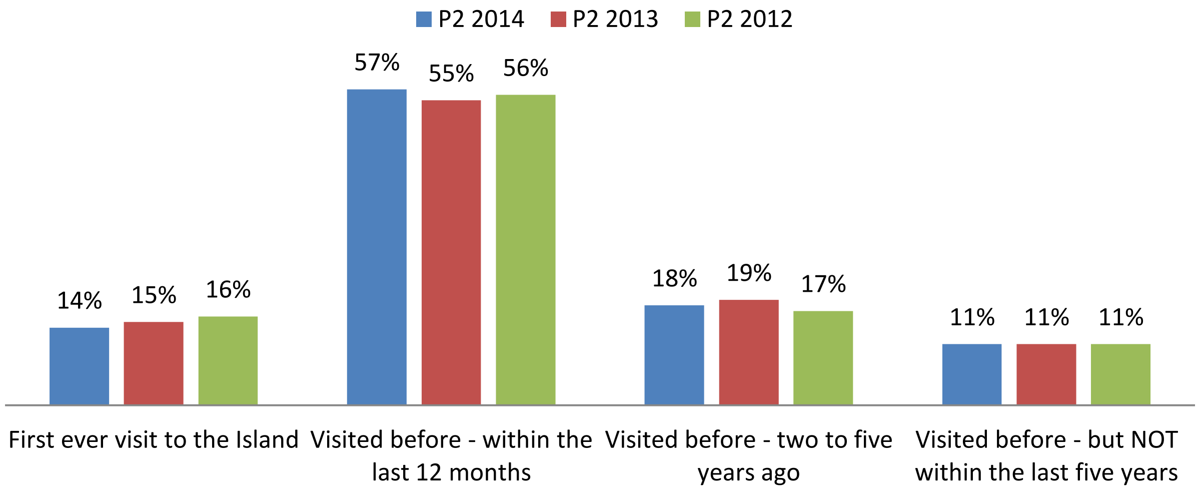
In common with previous years, overnight visitors were much more likely to have visited attractions on the Island than day visitors during Period 2 (59% compared with 35%).

New versus repeat visitors to the Island

Fourteen percent of all leisure visitors were visiting the Isle of Wight for the first time during Period 2 of 2014.

The majority (57%) had visited the Island before within the last 12 months and a further 18% had previously visited the Island within the last two to five years. Around 11% were lapsed visitors who had last visited the Island more than 5 years ago.
The results are similar to those obtained over the same period in recent years (Figure 14).

Figure 14: Previous visits to the IOW
Period 2 2014 vs Period 2 in previous years



As found in previous analysis periods, overseas visitors were more likely to be visiting the Island for the first time than domestic visitors. Almost half of all overseas visitors this spring were visiting the Island for the first time (44% and 50% respectively during Period 2 of 2013 and 2012).

In common with previous years, there was relatively little variation in the first-time/ repeat visitor profile of day and staying visitors during Period 2.

Table 11: First time/repeat visits by visitor type – Period 2, 2014				
	Domestic visitors	Overseas visitors	Overnight visitors	Day Visitors
YES - first ever visit to the Island	13%	42%	14%	11%
Visited before - within the last 12 months	59%	26%	58%	60%
Visited before - two to five years ago	18%	18%	18%	20%
Visited before - but NOT within the last five years	10%	13%	10%	9%

Whether visitors intend to visit the Island again (and when)

This question was first included in the survey during Period 1 this year, asking leisure visitors whether they intend to visit the Island again, and if so, when they anticipated their next visit would be. Those visiting on business/ work related trips were not required to answer this question.

The results for Period 2 show that a high proportion of leisure visitors intend to visit the Island again at some point (79%), while only 1% said they would not visit again and 20% were unsure. As shown in Table 12a, more than half of all respondents indicated they would visit the Island again this year (55%).

Table 12a: Whether intend to visit the Island again (if so, when) – Period 2, 2014 by visitor type							
	All visitors*	Domestic visitors	O'seas visitors	Staying visitors	Day Visitors	First time visitors **	Repeat Visitors
YES – intend to visit again this year	55%	56%	25%	52%	60%	17%	63%
YES – intend to visit again next year	16%	17%	11%	18%	13%	17%	17%
YES – intend to visit again within the next few years	8%	8%	10%	9%	6%	31%	6%
Don't know	20%	18%	53%	20%	20%	29%	13%
NO – not intending to visit again	1%	1%	1%	1%	1%	5%	0%

** Excludes those visiting for business/ work related trips. ** First time visitors returning to the mainland at the end of their visit only*

Looking at the responses by the purpose of visit at the time they were interviewed, it is perhaps not surprising that those visiting friends or relatives either for the day or for a staying trip and those visiting for a leisure day trip from home were most likely to indicate that they would visit again in the near future (Table 12b).

Table 12b: Whether intend to visit the Island again (if so, when) – Period 2, 2014 by purpose of trip						
	All holiday visitors	Overnight VFR	Leisure day from home	Leisure day on holiday	Day VFR	All 'other' trips (day/ staying)
YES – intend to visit again this year	39%	82%	57%	14%	85%	67%
YES – intend to visit again next year	22%	8%	16%	22%	8%	4%
YES – intend to visit again within the next few years	13%	1%	9%	11%	-	4%
Don't know	25%	8%	17%	51%	6%	25%
NO – not intending to visit again	1%	-	0%	2%	1%	-

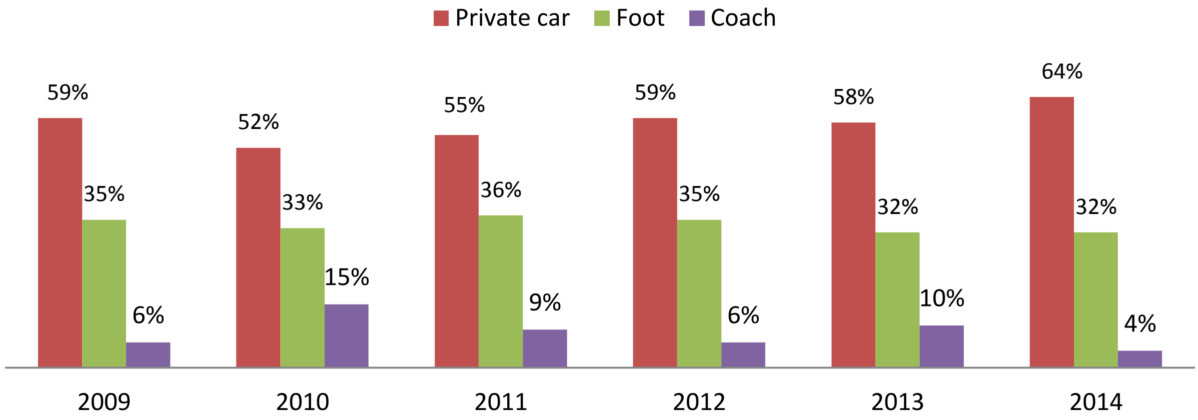
Mode of transport

Mode of travel on board the ferry is recorded for all visitors and used to estimate the overall split between those travelling as car[3], coach and foot passengers.

As shown in Figure 15, the proportion of visitors bringing their own vehicle to the Island during Period 2 this year was higher than in recent years at 64%. Relatively few visitors included in the Period 2 sample were travelling to the Island as part of a coach party (4%).

[3] *This category includes motorhomes, vans, motorcycles, HGVs etc.*

Figure 15: Mode of transport on ferry - all visitors
Period 2 2014 vs Period 2 in previous years



Visitors were asked how they travelled around the Island during their visit. As in previous years, the majority of visitors indicated that they used their own vehicle (65%). Around 7% of visitors this spring did not use any transport but travelled around on foot. Six percent relied on transport provided by friends or relatives and 10% used local bus services. Six percent of visitors travelled around the Island by coach (Table 13).

Table 13: Mode of transport used around the Island – all visitors Period 2

	2011	2012	2013	2014
Private car	61%	63%	55%	65%
Walking/ on foot	9%	8%	8%	7%
Bus	8%	7%	8%	10%
Transport provided by friend/ relative	7%	8%	8%	6%
Coach	12%	7%	15%	6%
Taxi	2%	3%	2%	2%
Train	2%	1%	2%	2%
Bicycle	1%	1%	1%	2%
Mini-bus	0%	1%	1%	0%
Rented vehicle	0%	0%	0%	0%

The results for this analysis period have been fairly consistent over the last four years, although the use of private vehicles has increased compared with the same period in recent years.

Use of own vehicles on the Island during the visit

A new question introduced for this survey period asked all visitors who were travelling with their own vehicle (who were returning to the mainland at the end of their trip) how often they had used their car on the Island during their visit. As shown in Table 14a (overleaf), a high proportion of those travelling with their own vehicle used it frequently during their visit (66% 'all the time' and 13% 'very often').

A relatively small proportion of visitors only used their vehicle to get to their destination or accommodation on the Island.

Table 14a: How often did you use your car on the Island during your visit – Period 2, 2014 by visitor type			
	All visitors*	Staying visitors	Day Visitors
All the time	66%	59%	79%
Very often	13%	19%	4%
Sometimes	9%	10%	7%
Very occasionally	4%	6%	1%
Just to get to and from my destination/ accommodation	7%	6%	9%

* Returning visitors travelling with their own vehicle only

Looking at the results by the main purpose of their visit (Table 14b), it can be seen that day visitors to friends and relatives (VFR) and overnight business/ work visitors were least likely to use their car during their visit, while leisure day visitors and day business/ work visitors[4] were most likely to use their vehicle for a high proportion of the time they spent on the Island.

Table 14b: How often did you use your car on the Island during your visit – Period 2, 2014 by purpose of visit								
	All holiday visitors	Overnight VFR	Overnight business/ work	Leisure day from home	Leisure day on holiday	Day VFR	Day business/ work	All 'other' trips
All the time	58%	56%	69%	76%	95%	67%	90%	60%
Very often	21%	18%	-	2%	5%	4%	5%	7%
Sometimes	10%	12%	13%	16%	-	7%	-	13%
Very occasionally	6%	5%	13%	2%	-	2%	-	-
Just to get to and from my destination/ accommodation	5%	9%	6%	4%	-	20%	5%	20%

Volume & value of tourism

Based on data from the visitor survey, the average expenditure per person per trip during Period 2 of 2014 was £30.89 for a domestic day visitor, while the average spend for a day visitor from overseas was slightly higher at £40.31. Domestic day visitor spend was comparable with the average for this period in 2013 (£28.26) and 2012 (£27.15), however the average spend by overseas day visitors this spring (£40.31) was slightly higher than figures for the same period last year (£24.42) and in 2012 (£33.79). As the number of overseas visitors encountered during each survey period is relatively small, spend figures for overseas visitors tend to be subject to wider margins of error than those for domestic visitors.

Domestic overnight visitors were found to spend an average of £175.57 per trip during Period 2 this year, slightly higher than the average for this period in 2013 (£159.25) and 2012 (£159.60) but possibly reflecting the slightly longer average trip duration for domestic staying visitors this spring compared with previous years (4.1 nights compared with 3.7 nights over this period in 2013 and 3.8 nights in 2012).

Overseas staying visitor expenditure at £243.75 per trip was lower than the average for this period in 2013 (£259.71) and 2012 (£282.10). Survey margins of error relating to the relatively small sample sizes for this visitor category are likely to be more significant than any other factor, since overseas visitor trips tended to be of a slightly longer duration this spring compared with last year, and the proportion of overseas visitors using commercial accommodation was similar to this time last year.

Once expenditure data is multiplied by the number of visitors, it is estimated that during Period 2 of 2014 tourism activity generated direct revenue of £105.3 million, an increase of around £7.56 million (up almost

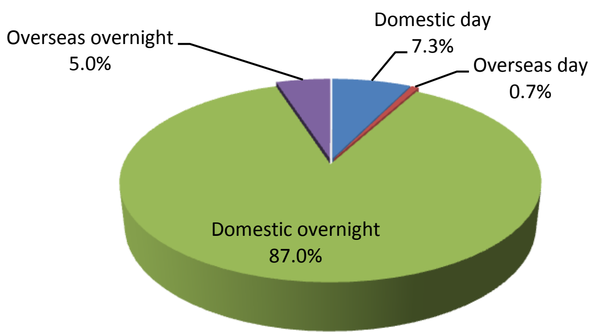
[4] These may include drivers of vans and HGVs making deliveries to business on the Island

8%) compared with the same period last year. Of this overall expenditure, 87% (around £97 million) was generated by domestic overnight visitors (Figure 16).

Table 15a: Total tourism volume & expenditure (Period 2)						
	Period 2 2014			**Period 2 2013**		
All	Total trips	Total trip expenditure	Avg. spend per trip	Total trips	Total visitor expenditure	Avg. spend per trip
Domestic overnight	521,930	£91,635,250	£175.57	498,431	£79,375,137	£159.25
Overseas overnight	21,519	£5,245,256	£243.75	39,982	£10,383,725	£259.71
Sub-total	**543,449**	**£96,880,506**		**538,413**	**£89,758,862**	
Domestic day	249,407	£7,704,182	£30.89	269,718	£7,622,231	£28.26
Overseas day	18,501	£745,775	£40.31	15,776	£385,250	£24.42
Sub-total	**267,908**	**£8,449,958**		**285,494**	**£8,007,481**	
Total value		**£105,330,464**			**£97,766,343**	

Note: Overseas trip volume and average expenditure is based on small samples.

Figure 16: Distribution of total trip expenditure Period 2 2014



Looking at Period 2 of 2014, 2013 and 2012 excluding the two weeks covering the Isle of Wight Festival, overall visitor spend amounted to around £89.4 million this year, an increase of just under 5% compared with 2013.

Table 15b: Total tourism volume & expenditure (Period 2)						
	Period 2 2014 excl. IOW Festival		**Period 2 2013 excl. IOW Festival**		**Period 2 2012 excl. IOW Festival**	
All	Total trips	Total trip expenditure	Total trips	Total visitor expenditure	Total trips	Total visitor expenditure
Domestic overnight	442,917	£77,762,938	435,106	£69,290,631	430,721	£68,473,072
Overseas overnight	18,232	£4,444,050	35,151	£9,129,066	20,011	£5,645,103
Sub-total	**461,150**	**£82,206,988**	**470,257**	**£78,419,697**	**450,732**	**£74,388,175**
Domestic day	211,531	£6,534,193	235,929	£6,667,354	220,121	£5,976,285
Overseas day	15,699	£632,827	13,787	£336,679	22,470	£759,261
Sub-total	**227,231**	**£7,167,019**	**249,716**	**£7,004,032**	**242,591**	**£6,736,546**
Total value		**£89,374,007**		**£85,423,729**		**£81,123,721**

Note: Overseas trip volume and average expenditure is based on small samples. No adjustment to average spend has been made in excluding the two weeks covering the Isle of Wight Festival each year, since only three interviewing sessions took place over this 2 week period each year.

In total, it is estimated that visitors spent £279.9 million on the Island in the twelve months to the end of Period 2 in 2014 (rolling total). This reflects an increase of around 5.7% compared with £264.9 million direct visitor spend on the Island over the 12 months ending with Period 2 in 2013.

Domestic overnight trips accounted for an estimated £243.5 million, 87% of the total tourism revenue for the year. The vast majority of revenue from these domestic overnight trips is generated by main or supplementary holidays and short breaks.

Domestic day trips accounted for around 7% of total revenue over the last twelve months and overseas overnight trips accounted for around 5% of total visitor revenue over the year.

Table 16:Total tourism volume & expenditure (Rolling total for the year ending Period 2 2014)

All	Total number of visitors	Total visitor expenditure	Avg. spend per visitor per trip
Domestic overnight	1,379,788	£243,515,100	£176.49
Overseas overnight	63,811	£14,326,500	£224.52
Sub-total overnight trip expenditure		£257,841,600	
Domestic day	810,535	£20,716,300	£25.56
Overseas day	37,347	£1,383,700	£37.05
Sub-total day trip expenditure		£22,100,000	
Total value	**2,304,031**	**£279,941,600**	

Note: Total visitor volumes and expenditure for the year have been rounded.

Appendix: Weather data

Weather data presented in this section is taken from Newport Weather Station data, part of the Isle of Wight Weather Station Network (www.isleofwightweather.co.uk)

As shown in the graphs below, the weather this spring has been fairly typical for the time of year. April and May this year were slightly wetter than the average, however June and July have been warmer, drier and sunnier than in recent years.

Figure 17a: Average Temperature (degrees Celsius) by month

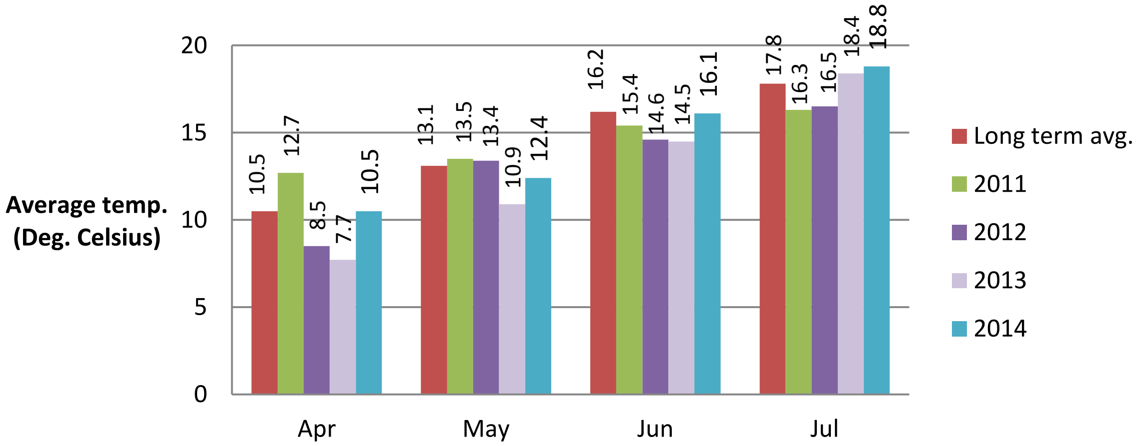


Figure 17b: Total Rainfall (mm) by month

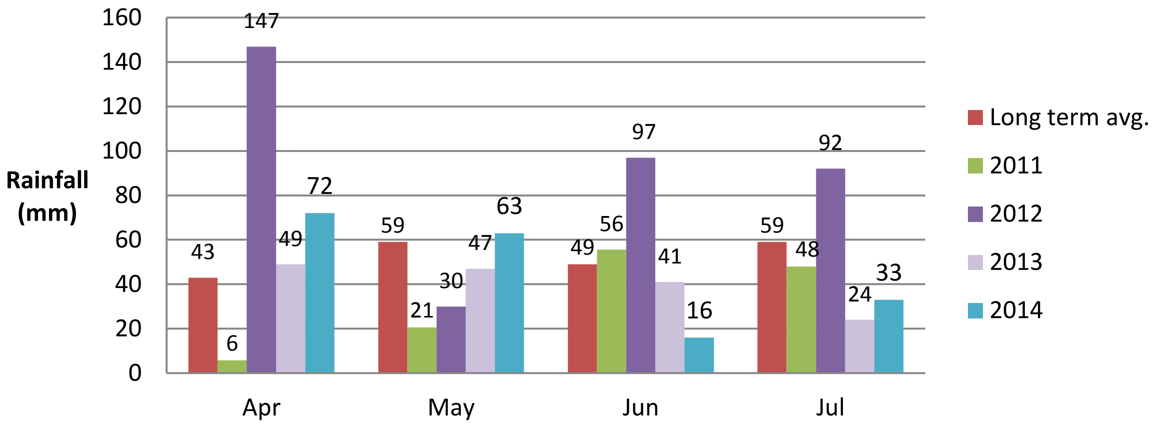


Figure 17c: Total Sunshine Hours by month