

YEAR TO DATE TOURISM FIGURES 2017 – ISLE OF WIGHT

Issued November 28th 2017 (January – September 2017 inclusive)

This report covers the YTD results for the Isle of Wight up until the end of September 2017, and the YTD for the South-East region (excluding London, which is shown separately), plus the UK as a whole up until the end of July 2017 – the latest GBTS report update.

WIDER CONTEXT (Across the UK)

The Great Britain Tourism Survey (GBTS) produced by Visit England on behalf of the Government state that the South-East region of England has seen a YTD* decline in domestic tourism of 13% in trips, 14% in bed nights and 6% in spend. (London has seen a 6% fall in bed nights and spend during the same period). Up until the end of July 2017 (the most recent GBTS figures from Visit England) the Isle of Wight out-performed the region as a whole: (South East region YTD trips 13% down, IOW same period trips 2% up). Visit England report that the UK overall has seen a 5% decline in tourism trips by domestic consumers in 2017 YTD*.¹

Northern destinations have seen an increase in visitor numbers this year. Falls in IOW visitors from the Midlands and the North suggest that these markets chose closer to home destinations for their summer break. The North East, North West and Yorkshire destinations all saw increases in visitor numbers in 2017*. Numbers from Yorkshire to the Isle of Wight declined this summer.

However, here on the Island, our single largest market, Hampshire, saw the largest fall in visitors to the Island, down from 257,000 to 241,000 in the summer school holidays. This follows an increase in Hampshire visitors the previous summer due to the warm weather throughout the holiday period.

YEAR TO DATE RESULTS – Isle of Wight

2017			
		Trips	Spend (Millions)
Quarter 1	Jan - March	355,371	£ 23.8
Quarter 2	April - June	730,874	£ 95.2
Quarter 3	July - Sept	892,522	£ 123.6
		1,978,767	£ 242.6
2016			
		Trips	Spend (Millions)
Quarter 1	Jan - March	379,600	£ 37.5
Quarter 2	April - June	662,800	£ 91.5
Quarter 3	July - Sept	939,900	£ 126.8
		1,982,300	£ 255.8

Between January 1st and September 30th 2017 the Isle of Wight received 3,533 less visitors than the same period last year.

Increases in total visitor volume (+43,845) up until the end of June were diminished by 47,378 fewer trips during the July – September period.

Average spend for staying visitors in spring 2017 was £183.48 per person per trip and

¹ *GBTS Government stats have been published to the end of July 2017 so far.

£201.28 per person per trip in summer 2017. Whilst the Summer 2017 pp spend was higher than 2016 (summer 2016 - £195), overall the economic returns from tourism in 2017 were lower despite roughly similar visitor numbers over the whole period. Summer visitors stay slightly longer than spring visitors, and therefore spend more within the Island's economy. However, summer economic returns in 2017 were still higher than the same quarter in 2015 or any earlier year.

The total number of new visitors to the Island increased to 1 in 5 of all visitors between April and September, the highest figure on record. Whilst the number of new visitors has increased substantially during the year, some of the Island's regular visitors chose not to return this summer. Two thirds of new visitors stayed on the Island, one third had day trips to the Island.

New visitors came from Essex (up 50%), Oxfordshire (up 40%), Buckinghamshire (up 40%), and Dorset (up 25%), whilst visitors from the north of England, the Midlands and Hampshire declined. During the summer school holidays, 15,000 less people visited the Island from Hampshire.

Overnight stays of four nights or less during the summer school holidays have reached their highest numbers for five years, rising from 320,000 (2012) to 371,000 (2017). However, longer holidays of 5 nights or more have fallen from 261,000 to 204,000 during the same period.

SUMMARY

If Bestival had taken place in 2017, overall visitor trip volume for the year would have been higher than 2016. However, a combination of no Bestival, wet weather through much of the school holiday period, and a concentration on attracting new visitors during shoulder periods resulted in a weaker summer than expected, but a better spring than in previous recent years.

Sources:

The Tourism South East Solent Traffic Research 2016 & 2017

Visit England GBTS (Great Britain Tourism Survey) up to July 2017, published in November 2017

Coastal Tourism Monitor – Wave 5 – National Coastal Tourism Academy

British Destination Association

Take Outs and Focus for 2018

The research collated over the year, from local, regional and national sources, combined with Island and mainland consultations and feedback in October have led Visit Isle of Wight to highlight the following priority areas of focus for the 2018 marketing and product development activities:

1. SHORTER STAYS = LESS SPEND

Shorter stays continue as a trend, with more people taking 1-4 night breaks and less taking breaks of 5 nights or more. Less time on the Island leads to less spending by visitors. Whilst there are external economic factors likely to influence this trend, encouraging visitors to stay an extra night will increase spending in attractions, cafes and restaurants as well as

accommodation. In 2018 marketing, packages and pricing should be geared to encourage stays of five nights or more.

2. LOW HANGING FRUIT - HAMPSHIRE

During the summer holidays Hampshire delivers over 240,000 of our visitor numbers, comprising 15% of all staying visitors and over 52% of day visitors. More effort should be aimed at attracting families from this region in July and August. Whilst these visitors are heavily influenced by the weather and late availability, a concerted effort to attract families in July and August could improve overall annual visitor numbers considerably.

3. MIDLANDS MESSAGES

In recent years less than 25,000 of our annual summer visitors come from the West Midlands and 25,000 from the East Midlands. Given the densely populated conurbations in the Midlands, the prospects of growth from these areas are high and should be considered one of the key market opportunities for the coming years, especially as almost all visitors from the Midlands stay overnight.

4. PURE ISLAND HAPPINESS V'S FAMILY FUN

Whilst there has been considerable growth in low season visitors, primarily couples, especially in self-catering, glamping and bed and breakfast properties, the Island has been hesitant to launch full-on family holiday campaigns in recent years. The last, in 2014 (The Year of the Dinosaurs) brought in more family visitors than came in 2017. Whilst higher spending couples out of season are extremely desirable, they don't deliver during the school holidays. A more direct, "back to basics" approach is additionally required to engage with the family market in 2018 and bring them to the Island during school holiday periods.

5. NEW VISITS V'S REPEATING & TRADITIONAL VISITORS

The growth in new visitors is unprecedented. The Wight BID set its self the challenge of attracting new visitors in year one, and this has been achieved. 1 in 5 of all visitors between April and September had never visited the Island before. Whilst this work needs to continue, regular and traditional audience bases also require urgent marketing attention in 2018. It may be a challenge to stretch available funds to cover all market territories adequately, suggesting more linked up partnerships and affinity promotions with third parties will be required to obtain the reach and impact required.

6. PRODUCT PACKAGING & OVERSEAS MARKETS

The Isle of Wight attracts good overseas visitor numbers from Germany, France, Australia, The Netherlands and New Zealand, but overall only 6% of all visitors originate from overseas. Given the Island's product position, as "England in Miniature" and the considerable growth in overseas visitor numbers to the UK mainland in the last 18 months, much more should be done with Visit Britain, overseas travel agents, tour operators and travel agents to tap into this growing market. Overseas visitors spend considerably more than domestic visitors, are less influenced by the weather, and more pre-disposed to consider safe welcoming places.

Appendix

Additional information sourced from the Wight BID levy payer's consultations which took place in October 2017: 250 levy payers attended consultation events face to face and 120 completed a survey online.

1. Most responders want to see us concentrate on attracting overnight staying visitors. But for 20% day-visits are crucially important.
2. The Wight BID levy payers want to see us concentrate on Families with young children and couples between the ages of 35 years and 60 years. Other important markets were groups, families with older children and young adults.
3. Most levy payers want to see us concentrate on visitors from within two to four hours drive time of the mainland ferry ports
4. Birmingham, Oxford, Guildford and Reading were the top areas (outside London) that levy payers think we should concentrate upon. However, many levy payers want us to concentrate on all major conurbations within four hours drive time.
5. Levy payers believe the most important overseas markets are Germany, France, the Netherlands, USA and Asia.
6. Most levy payers want to see money spent on attracting mainland visitors (Roughly 80 / 20 proportional split of expenditure)
7. Most levy payers wish to see us concentrate on attracting visitors during shoulder periods and low season, although a significant number want us to concentrate on both high season and low season equally.
8. Most levy payers want us to concentrate on attracting new visitors, although a significant number want us to also keep attracting repeat visitors back to the Island.
9. On the whole levy payers wanted to focus on digital communications, but many felt that traditional media was just as important.
10. Levy payers believe that the most important time of the year for advertising the Island in January and February, followed by March and April.
11. Levy payers recognise that whilst their bookings are spread across the year, and they experience the most number of bookings in July and August, they still feel that advertising in January and February is essential to trigger that effect.
12. Levy payers felt the printed guide was less important these days, but many still think a printed guide is an important part of the communications mix
13. Most levy payers felt that events and festivals were important for attracting new visitors to the Island, but they did not think we should fund events or manage them, but market them instead. However 65% of responders thought that it was important to maintain the Walking Festival, even if the levy fund had to pay for it.
14. Most levy payers think that it is important to keep using levy payer funds to help towards the cost of attending off-Island exhibitions

15. 77% of all levy responders felt it was important to maintain a centrally co-ordinated organisation for marketing, PR and tourism generally.
16. Levy payers thought all forms of advertising should be used where appropriate, but tended to rank digital advertising slightly higher than traditional advertising. Social media was rated top, whilst printed leaflets were rated bottom.
17. Key newspaper targets for levy payers are: The Times, The Daily Telegraph, The Daily Mail, The Mail on Sunday, The Sunday Times, The Sunday Telegraph, The Guardian and the Sun – in that order.
18. Top lifestyle magazines recommended by levy payers were Travel and Leisure, Walking, Cycling, Homes and Gardens, History and Heritage, Women’s magazines and Camping and Caravanning – in that order.
19. Only half of the responders felt that the Wight BID be should be used to provide resources for levy payers to use in their own business. But they ranked free use of a photo library highest, marketing training, especially digital, as their second choice, and toolkits as their third.
20. We asked Levy payers what we could do to improve our performance by this time next year and received 75 specific answers. Mostly were about more marketing, bigger campaigns, better websites, and raise more money for marketing.

Rainfall averages: July 2017 was the wettest July for five years. August had more than twice as much rainfall as 2016, but was not as wet as 2015 and 2014.

Rainfall	Jan	Feb	Mar	Apr	May	Jun	July	August	Sep	Oct	Nov	Dec
2010	104	99	58	22	22	38	24	104	30	73	87	23
Long term average	60	56	66	43	59	49	59	78	53	134	84	94
2011	77	56	14	6	21	56	48	47	33	25	31	89
2012	46	14	14	147	30	97	92	47	71	128	116	149
2013	116	42	71	49	47	41	24	34	44	151	67	190
2014	201	156	47	72	63	16	33	80	5	102	142	45
2015	105	68	18	15	55	42	51	111	64	47	80	74
2016	155	50	75	48	42	91	10	25	38	30	67	22
2017	68	56	47	8	43	53	85	55	69			

Sunshine hours	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2010	103	128	253	328	359	380	367	316	270	209	116	67
2011	98	117	260	328	373	371	365	326	280	212	118	84
2012	112	168	263	287	350	338	347	338	274	170	123	87
2013	76	130	204	303	347	367	384	336	253	188	115	77
2014	95	164	271	293	335	377	384	297	277	186	94	94
2015	111	147	251	321	346	371	351	301	273	188	81	64
2016	97	164	250	305	359	339	372	335	255	205	137	82
2017	112	128	253	321	347	362	362	321	259			

The Coastal tourism monitor, produced by the National Coastal Tourism Academy on behalf of the coastal destination in the UK recorded poor weather this summer as the top reason for a decline in coastal tourism numbers. A copy of the report can be found in the “Tools” section of the Visit Isle of Wight Industry website, on the “Research and Evaluation” page. www.visitwightpro.com

David Thornton
 CEO – Visit Isle of Wight
 November 28th 2017

Isle of Wight Visitor Monitor 2017 Results for Quarter 3 (1 July to 30 September)

Total visitor volume

 **892,522 visitors in Quarter 3**
↓ down 5%

 **2.38m visitors over the last 12 months (October 2016-Sept 2017)**
↓ down 1%

Total visitor spend

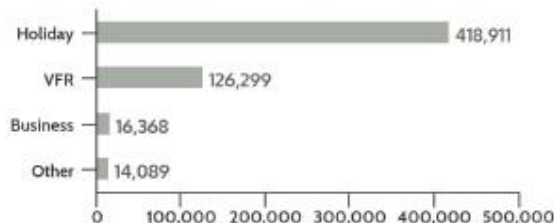
 **£123.6m spent in Quarter 3**
↓ down 3%

 **£282.7m spent over the last 12 months (October 2016-Sept 2017)**
↓ down 5%

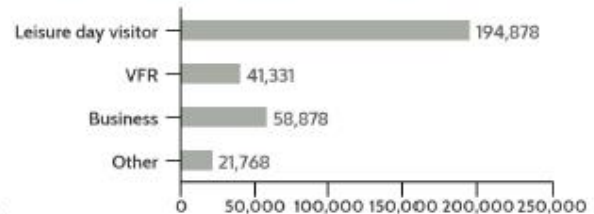
VIOW attracted 892,522 visitors in Quarter 3 who spent a total of £123.6m. Visitors and spend was down from 2016 by 5% and 3% respectively, with higher per visit spending by staying visitors helping total spend. The poor weather in Q3 is likely to have contributed to the decline in visitor numbers.

A major priority for VIOW has been to attract more first-time visitors to the Island. There has been significant success here with 19% of visitors being first-timers to the Island higher than all previous Q3 periods.

Number of overnight visitors (Quarter 3 2017)



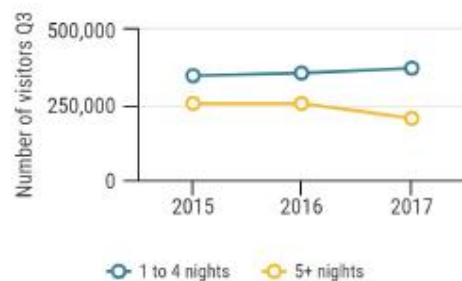
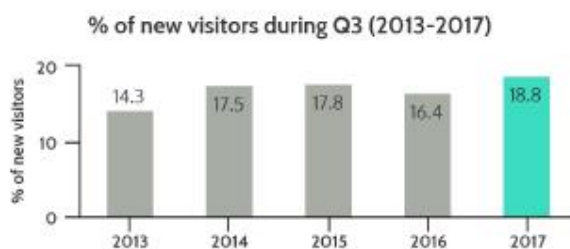
Number of day visitors (Quarter 3 2017)



Overnight trips dominated by leisure/holiday trips (73%). Overnight leisure/holiday trips down 5% but a large increase in business trips compared to Q3 2016.

Significant growth in shorter stay holidays but decline in longer holidays of 5+ nights, reflecting wider market trends

One-in-five were visiting for the first-time, higher than previous years



19% of overnight visitors stayed 5 or more nights

Visitor profile and trip features: Quarter 3 2017



- 27% from Hampshire
- 8% from London area
- 26% from elsewhere in South East
- 33% from elsewhere in UK
- 6% of visitors from overseas



45% visited one or more of the Island's paid for or free visitor attractions during Quarter 3, down from 50% in the same quarter last year

61% of visitors came from areas of the South East including London, with 33% travelling from elsewhere in the UK and 6% visited from overseas.

There were 2,458,309 bednights on the Island during Q3 2017 of which 68% were spent in commercial accommodation (1,676,430). The average length of stay was 4.34 nights, continuing the trend for shorter stays which is reflected across the tourism market generally. Indeed, 81% of the Island's overnight visitors stayed for less than 5 nights in Q3.

Overall, 45% visited one of the Islands visitor attractions during Q3 2017, including 52% of staying visitors and 32% of day visitors.

Average spend per trip has increased 3% to £201.38 per trip, whereas day visitor spend fell slightly to £21.05 per trip.

Total bednights on the Island during Q3 were 2,458,309

68% of total bednights spent in commercial accommodation (1,676,430)

Average length of stay was 4.34 nights

Accommodation used by overnight visitors



35% of all overnight visitors stayed in a hotel, guest house or B&B compared to 48% of holiday makers



39% of all overnight visitors stayed in the home of a friend/relative or a second home compared to 14% of holiday makers



18% of all overnight visitors stayed in rented cottage, static caravan or chalet compared to 27% of holiday makers



7% of all overnight visitors camped or stayed in a touring caravan compared to 10% of holidaymakers



1% of all overnight visitors stayed onboard a boat

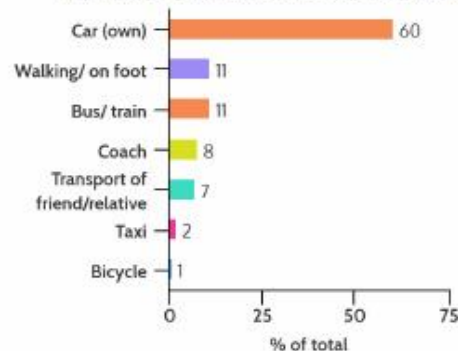
Average group size 2.6 people

78% of visitors are in groups of adults only

- 25% visited alone
- 41% visited in party of 2 people
- 34% 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 (%)



Day visitor avg. spend per trip

£ 21.05 per day

Overnight visitor avg. spend per trip

£ 201.38 per trip