



Isle of Wight destination report



VisitEngland Destination tracker:

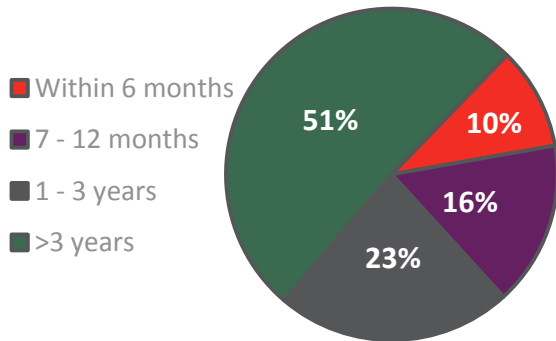
- Since April 2015, the national tourist boards of VisitEngland, VisitScotland and VisitWales have been tracking visitor perceptions of holiday destinations across GB in a single research vehicle.
- Data in this report is from April 2015 – September 2016
- This study explores **behavioural and experience measures** such as, visitation, spend, stay length, satisfaction and advocacy within individual destinations. As well as the **imagery perceptions** of each destination.
- In the report there are 3 samples for comparison; those from whom this destination was the most recently visited, those who claim to visit a seaside destination at C52 and finally a GB average.
- All respondents are GB holiday takers, having taken a GB break in the past 12 months or are expecting to in the next 12 months. This accounts for approx. 49% of the population.
- Significant differences will be indicated by a **black**↑/**orange**↓ arrow against seaside destinations and a **blue**↑/**red**↓ against GB.
- This report provides a snapshot of:
 1. A demographic split of destination visitors
 2. The behaviours exhibited at the destination: How loyal are they to the destination and how satisfied were they with their trip?
 3. How GB holiday makers perceive this destination and how does it compare with others?
- Finally there is a summary of findings.

Who is visiting?

Ever Visited the Isle of Wight :

55%

Time since last visit



*Please note respondents can have visited more than one destination in the last 3 years

Visited destination in the last 3 years

Gender	The Isle of Wight	Seaside	Great Britain
Male	55%↑	47%	49%
Female	45%↓	53%	51%

Age	The Isle of Wight	Seaside	Great Britain
18-24	19%↑	10%	14%
25-34	17%	12%	16%
35-44	13%	19%	17%
45-54	14%	18%	18%
55-64	19%	17%	15%
65+	18%	24%	20%

Region of origin	The Isle of Wight	Seaside	Great Britain
Wales	3%	6%	5%
Scotland	3%↓	5%	9%
North East	3%	3%	4%
North West	9%	11%	11%
Yorkshire/ Humberside	5%↓	10%	9%
East Midlands	8%	8%	7%
West Midlands	11%	13%	9%
East Anglia / East of England	10%	9%	10%
Greater London	20%↑↑	11%	13%
South East	21%↑↑	15%	14%
South West	8%	9%	9%

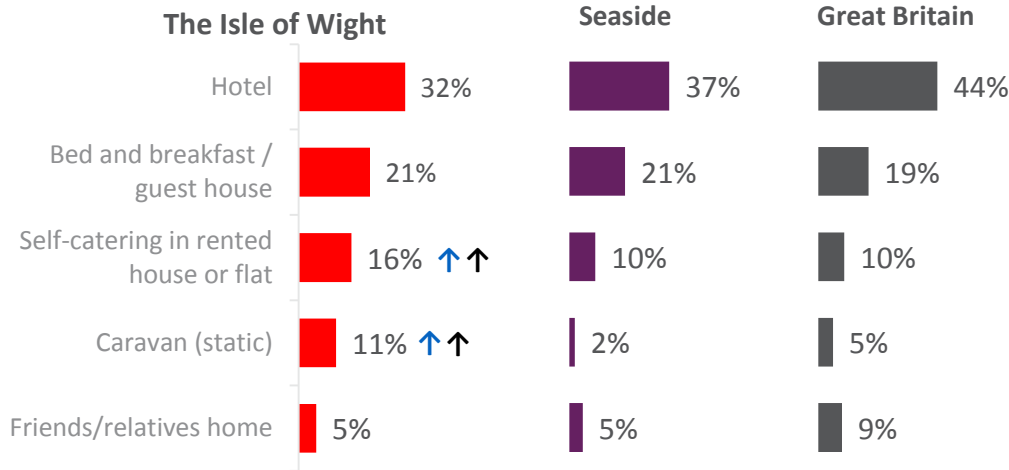
JUST OVER HALF OF GB DOMESTIC HOLIDAY MAKERS HAVE VISITED THE ISLE OF WIGHT. THE DESTINATION ATTRACTS AN AUDIENCE WHO ARE MORE LIKELY TO BE YOUNGER AND MALE THAN OTHER SEASIDE DESTINATIONS. OF THOSE WHO VISIT THE ISLAND, HALF COME FROM THE SOUTH.

Base: The Isle of Wight reduced destination list n=713 The Isle of Wight last 3 years reduced destination list n= 168 Seaside destination n= 1695 total base n=12771

Significant differences will be indicated by a black↑/orange↓ arrow against seaside destinations and a blue↑/red↓ against GB

Where are they staying? – among most recent visitors

Accommodation type (Top 5)



Accommodation Quality Average (claimed)

3.4 Star



Accommodation Quality	The Isle of Wight	Seaside	Great Britain
1 star	2%	1%	1%
2 star	8%	7%	6%
3 star	29% ↓	39%	36%
4 star	32%	30%	33%
5 star	8%	5%	7%
Don't know/ Can't Remember	22%	18%	17%



THE LARGEST PROPORTION OF VISITORS TO THE ISLE OF WIGHT STAY IN A HOTEL. HOWEVER, COMPARED WITH ELSEWHERE IN GB, A LARGER NUMBER OF VISITORS CHOOSE TO STAY IN ALTERNATIVE ACCOMMODATION, WITH 1-IN-10 VISITORS TO THE ISLE OF WIGHT CHOOSING AN OVERNIGHT STAY IN A CARAVAN (VS. 1-IN-20 NATIONALLY) AND A SIGNIFICANTLY HIGHER PROPORTION OF VISITORS CHOOSING TO STAY IN SELF-CATERED RENTED ACCOMMODATION ON THE ISLAND.

Base: Most recently visited destination n=128 Seaside destination n= 1695 Total Base n=12179 Question name: In tables

Significant differences will be indicated by a black ↑/orange ↓ arrow against seaside destinations and a blue ↑/red ↓ against GB

Consideration, satisfaction & intention to visit

Loyalty Ladder	The Isle of Wight destination average	Seaside destination average*	Great Britain destination average*
Loyal (I often/sometimes take holidays there and intended to in the next year/couple of years)	14%	14%	17%
Considerers (I have been/never been to this destination before but would like to in the future)	58%	48%	48%
Rejecters (I have been/never been to this destination before and am not likely to do so in the future)	21%	28%	26%
Satisfaction	46%	50%	48%
Likelihood to revisit	8.2	8.6	8.4
Base n=	713/128	1695	12179

THE ISLE OF WIGHT HAS A HIGH LEVEL OF CONSIDERATION COMPARED TO OTHER SEASIDE DESTINATIONS. THE PROPORTION OF LOYAL VISITORS TO THE ISLE OF WIGHT IS IN LINE WITH OTHER SEASIDE DESTINATIONS, THIS MEANS THAT THE AMOUNT OF HOLIDAY MAKERS THAT REJECT THE DESTINATION IS LOWER THAN ELSEWHERE. LEVELS OF SATISFACTION AND LIKELIHOOD TO REVISIT AMONG VISITORS TO THE ISLE OF WIGHT ARE BOTH SLIGHTLY LOWER THAN THOSE OF VISITORS TO OTHER SEASIDE DESTINATIONS.

Base: In table Asked of all the Isle of Wight shown on rotation from reduced destination list / Most recently visited destination
Question name: In tables

* Averages taken manually from averaging each destination, not via nett.

Destination attribute satisfaction – among visitors to the Isle of Wight

Destination attributes difference analysis

		Seaside	GB*
Being welcoming and friendly	79%	77%	74%
The quality of the natural environment	78%	74%	81%
The quality of accommodation options	78%	71%	71%
The availability of information about the destination once you're there	78% ↑↑	69%	68%
The availability of information about the destination before you get there	75%	69%	69%
The range of attractions and things to do	73%	66%	67%
Its history and heritage (famous buildings, castles, monuments)	73% ↑	59%	71%
Offering a distinctive, authentic experience	73% ↑	61%	68%
The quality of food & drink	72%	70%	72%
The ease of getting around the destination	71%	70%	69%
Its overall value for money	69%	66%	63%
The customer service given	68%	69%	68%
Having beautiful beaches	67%	66%	66%
The ease of getting to the destination	64%	65%	66%
The availability of individual/independent local shops	59%	64%	61%

THE ISLE OF WIGHT STANDS OUT AGAINST OTHER DESTINATIONS IN GB FOR THE AVAILABILITY OF INFORMATION FOR VISITORS, ONCE THEY HAVE REACHED THE ISLAND. COMPARED WITH OTHER SEASIDE DESTINATIONS, HISTORY AND HERITAGE IS MORE FREQUENTLY RECOGNISED BY VISITORS, AS IS THE OFFER OF A DISTINCTIVE AND AUTHENTIC EXPERIENCE.

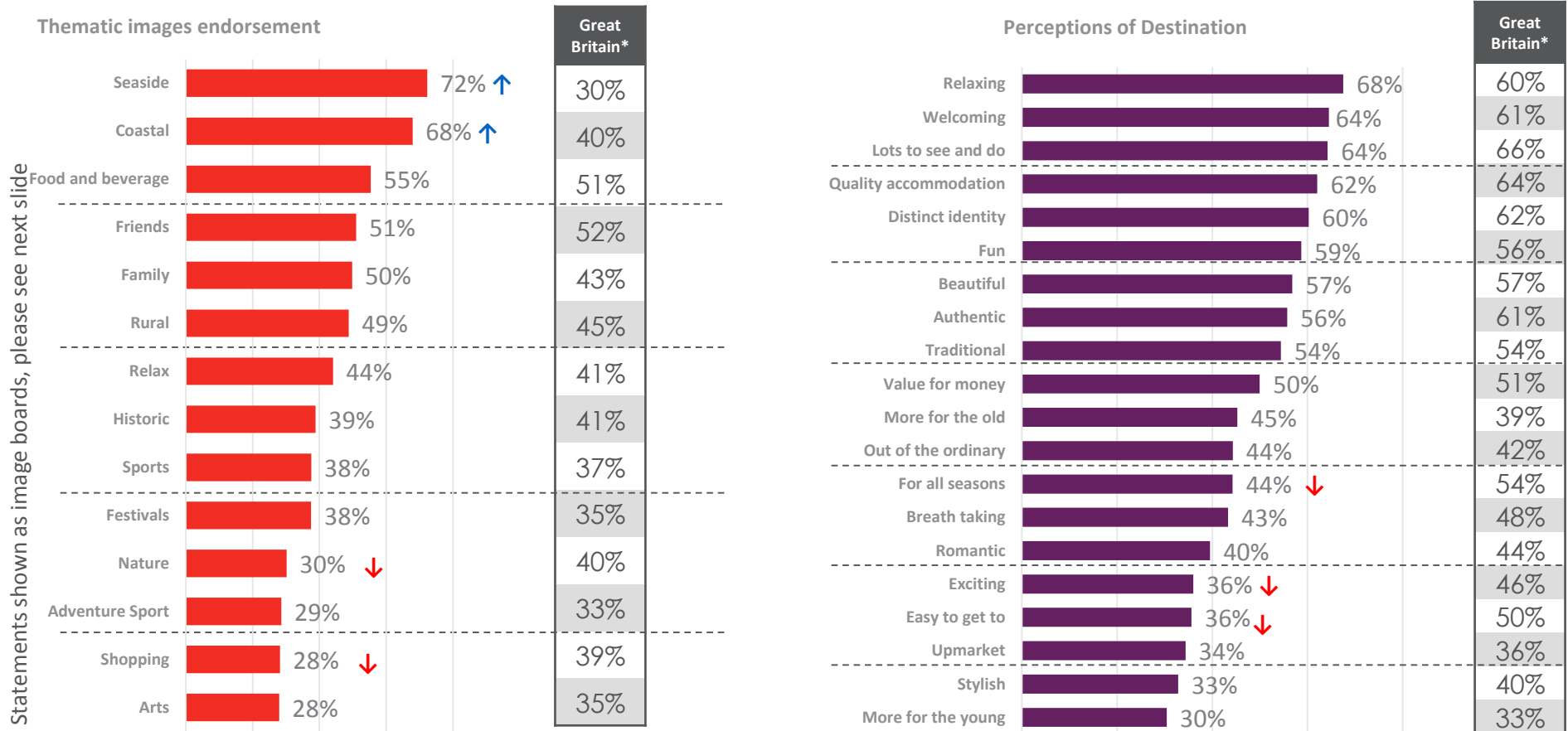
Base: The Isle of Wight n=128 Seaside n= 1695 Total n=12179
Question name: C90 Destination attributes

Significant differences will be indicated by a black ↑/orange ↓ arrow against seaside destinations and a blue ↑/red ↓ against GB



Destination attribute perception - among GB holiday makers

These questions ask how destinations are perceived generally, not how each was rated on a recent trip. The question is asked of visitors and non-visitors.



Statements shown as image boards, please see next slide

FEW ASPECTS OF THE ISLE OF WIGHT STAND OUT AMONG DOMESTIC HOLIDAY MAKERS, ONLY ASSOCIATIONS WITH ITS COASTLINE ARE RECOGNISED MORE OFTEN THAN FOR OTHER DESTINATIONS. THE ISLE OF WIGHT IS SEEN TO BE MORE RELAXING THAN THE AVERAGE DESTINATION IN GB, BUT IS ALSO SEEN TO BE SIGNIFICANTLY LESS EXCITING.

Base: The Isle of Wight n=276, Total n=12179

Question name: C90 Destination attributes

* Averages taken manually from summing each destination, not via nett.

Significant differences will be indicated by a black ↑/orange ↓ arrow against seaside destinations and a blue ↑/red ↓ against GB



The theme boards

Image boards (E30/35)

Shopping



Friends



Seaside



Food & drink



Rural



Festivals



Relax



Family



Nature



Coastal



Historic



Arts



Adventure



Sports



Word associations (E40/45)

- Beautiful
- Breath-taking
- Distinct culture
- Traditional
- Authentic
- Relaxing
- Quality accommodation
- Fun
- Friendly
- Romantic
- Surprising
- Exciting
- Out of the ordinary
- Value for money
- For all seasons
- Stylish
- More for the old
- Easy to get to
- Upmarket
- More for the young

Summary: Isle of Wight

- Just over half of GB domestic holiday makers have visited the Isle of Wight.
- Visitors to the Isle of Wight are more likely to be male and younger than visitors to other seaside destinations. There is also a strong skew in favour of visitors to the destination from the south of England.
- Compared with other destinations, a greater proportion of visitors to the Isle of Wight stay in caravans, and self-catered rented accommodation. Despite this, hotels remain the most common accommodation choice on the island.
- Consideration of the Isle of Wight as a holiday destination is higher than that of other seaside destinations, in turn less GB holiday makers are rejecters of the destination. However, visitors to the Isle of Wight have a lower level of satisfaction and likelihood to revisit than for other destinations.
- Among domestic holiday makers, the Isle of Wight struggles to stand out against other GB destinations beyond geographical attributes such as its coastline - though it has no significant negatives. The destination is, however, seen to be more relaxing than the average destination in GB.
- Among visitors, the Isle of Wight has traits which differentiate it from other seaside destinations. Visitors are more likely to point to history and heritage and the distinct and authentic experience on offer on the Isle of Wight, when compared to other destinations. Compared with GB generally, visitors to the Isle of Wight recognise the availability of information in the destination.
- **A watch out:** Broadly the Isle of Wight performs on a parity with other GB destinations, the island has muted levels of endorsement among GB holiday makers for the majority of perceptual statements and the destination would benefit from carving out a clearer set of reasons to visit among this group.