

Tourism trends quarterly bulletin
Accommodation Statistics: Spring 2008

Introduction

This bulletin provides the occupancy levels in serviced accommodation on the Island for the period from March 17th to July 13th and for self catering accommodation from March 22nd to July 11th. The report covers claimed use of accommodation by visitors (taken from the ferry research amongst visitors); occupancy levels in serviced accommodation on the Island together with comparisons with the mainland, plus occupancy levels in self catering accommodation. Occupancy data is taken from a survey amongst accommodation providers on the Island. A panel of serviced providers has been established in order to improve the validity of comparisons from year to year. This spring 29 serviced establishments took part. Within the non serviced sector, the numbers responding varied each month (43 – 77); these are therefore provisional figures which will be updated at the end of the year.

Type of accommodation used by staying visitors

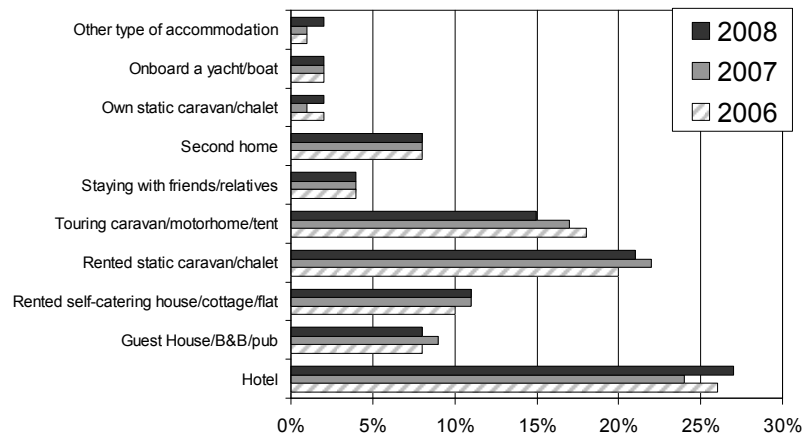
Visitors to the Island are asked about the type of accommodation they have used or are expecting to use whilst staying on the Island. This provides a view of types of accommodation that are not covered by the occupancy survey in addition to those that are.

Use of accommodation differs amongst different types of visitors:

- As would be expected, the vast majority (86%) of those visiting friends and relatives stayed with families but another 8% used hotels/guesthouses.
- Business visitors were most likely to use the serviced sector: 35% used hotels and another 17% used guesthouses/B&B's. 13% stayed with friends/relatives whilst on a business visit and a further 6% used second homes. There were also a few who used rented self catering houses/cottages/flats (5%), chalet properties (5%) or touring sites (4%).
- Approximately a third (35%) of those on a short break or holiday used serviced accommodation, with the majority choosing a hotel (27%). The most popular choice of self-catering accommodation was a rented chalet/static caravan (21%), with another 15% staying on a touring caravan/camping site. 11% used rented houses/cottages/flats. Second homes were used by 8% of holiday/short break visitors.

Over time the main change has been an increase in the use of hotels versus last year and a decrease in use of touring sites. Use of second homes remained static.

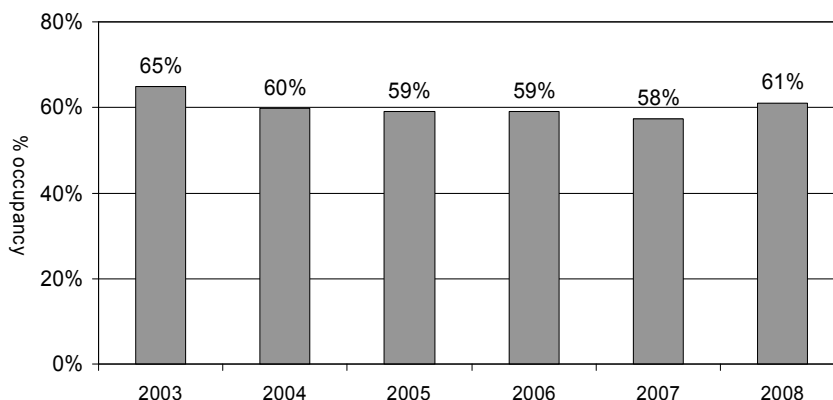
Type of accommodation used by holiday and short break visitors Q2 2008 vs. previous years



Room Occupancy in hotels/guesthouses/B&B's

Room occupancy has remained fairly constant over recent years. During this spring period it averaged 61%, which is up slightly (+3 points) versus last year. This is in line with the claimed use of hotels in the ferry survey (see previous section).

**Isle of Wight hotels/guesthouses/B&B's
Room occupancy: Q2 2008 average vs. previous years**



Room occupancy varies across the Island: this spring, room occupancy was much higher in Sandown than in other areas (72%), a 6 point improvement on spring last year and 10 points above 2006. West Wight and Newport/Ryde/Cowes performed in line with the average whilst Shanklin and Ventnor were slightly below.

In West Wight, there was a drop of 7 points and Newport/Ryde/Cowes fell by 5 points whereas Shanklin gained slightly versus last year.

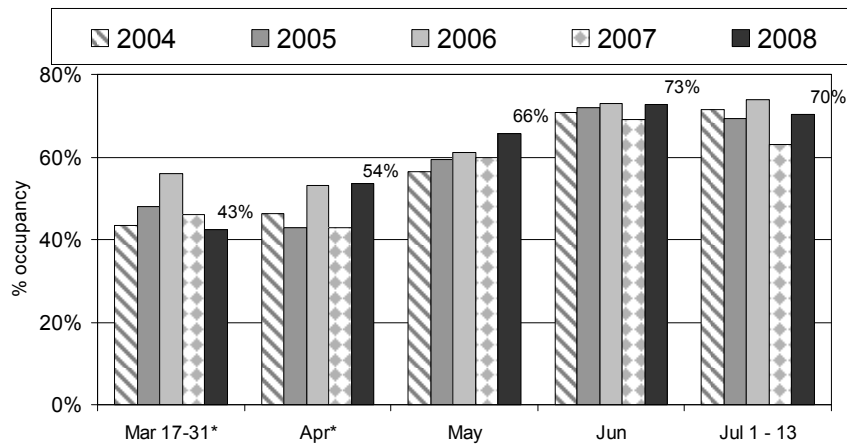
Area of Island	Room occupancy 2006	Room occupancy 2007	Room occupancy 2008
Sandown	62%	66%	72%
Newport/Ryde/Cowes	61%	64%	59%
West Wight	57%	65%	58%
Shanklin	57%	53%	56%
Ventnor	61%	57%	56%

In line with previous years, the largest hotels (26+ rooms) achieved significantly higher occupancy levels than the smaller B&B's. Larger hotels (26+ rooms) increased occupancy versus the last two years, whereas B&B's room occupancy fell by 9 points versus last year. Medium sized hotels/guesthouses were down a little on last year.

Size of establishment	Room occupancy 2006	Room occupancy 2007	Room occupancy 2008
26 or more rooms	70%	63%	72%
11 – 25 rooms	58%	55%	53%
4 – 10 rooms	45%	52%	48%
1 – 3 rooms	47%	53%	44%

Monthly room occupancy ranged from 43% in the latter part of March to a high point of 73% in June. With the exception of the end of March, each month was up on 2007 and occupancy in July recovered from the low level seen last year, despite the wet weather.

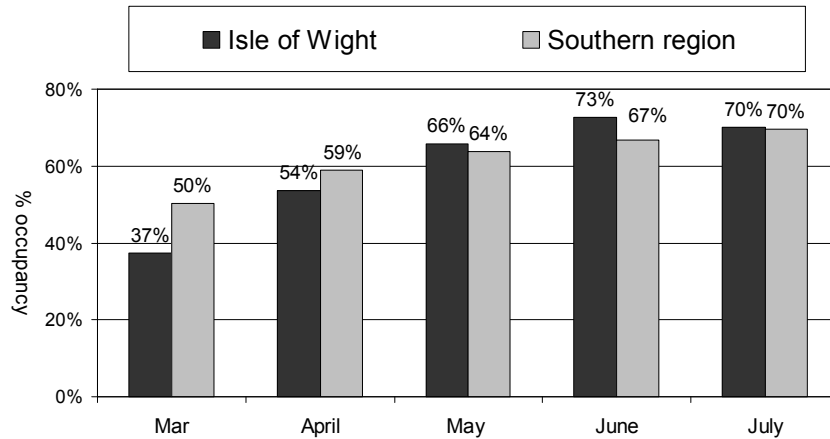
Isle of Wight hotels/guesthouses/B&B's
Room occupancy: Q2 2008 vs. previous years



*Comparative data is from varying dates; all years include Easter

Monthly average room occupancy can be compared with the whole of the Southern region. At the start of this period, occupancy levels on the Island were below the whole of the region but in May and June the Island exceeded the regional average and was on a par in July. This is an improvement on last year when June was the only month that the Island exceeded the regional average.

**Room occupancy hotels/guesthouses/B&B's
Isle of Wight vs. Southern region Q2 2008**

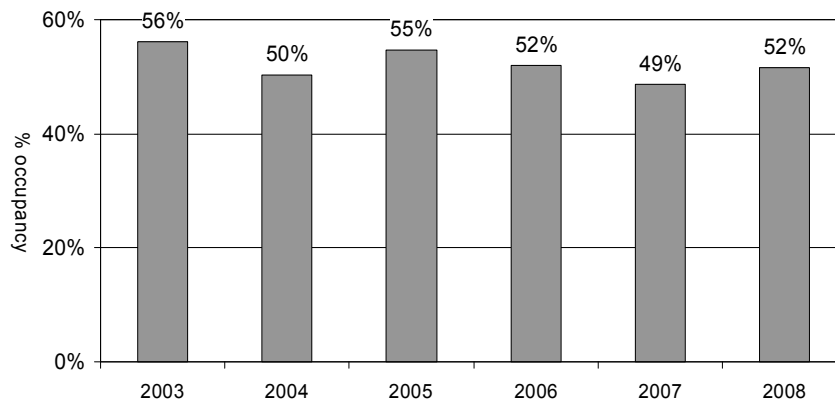


Whole months illustrated

Bedspace Occupancy in hotels/guesthouses/B&B's

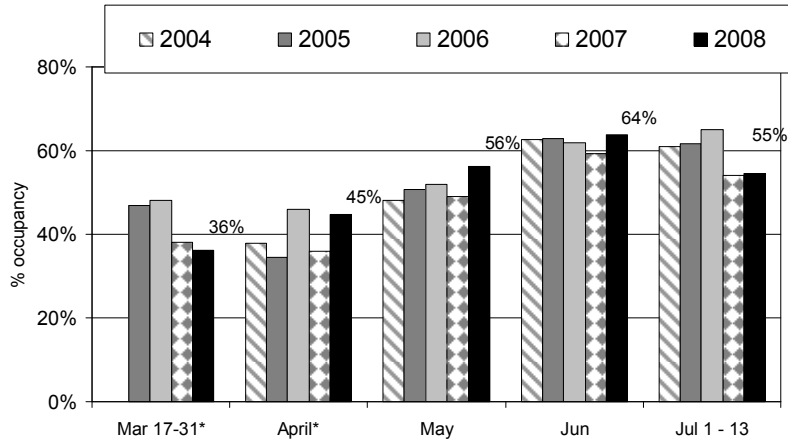
Bedspace occupancy averaged 52% during this period; an increase of 3 points on last year and level with spring 2006.

**Isle of Wight hotels/guesthouses/B&B's
Bedspace occupancy: Q2 2008 average vs. previous years**



Looking at monthly bedspace occupancy, this ranged from 36% in late March up to a high in June of 64% but fell back to 55% at the start of July. Trends over time follow a similar pattern to room occupancy.

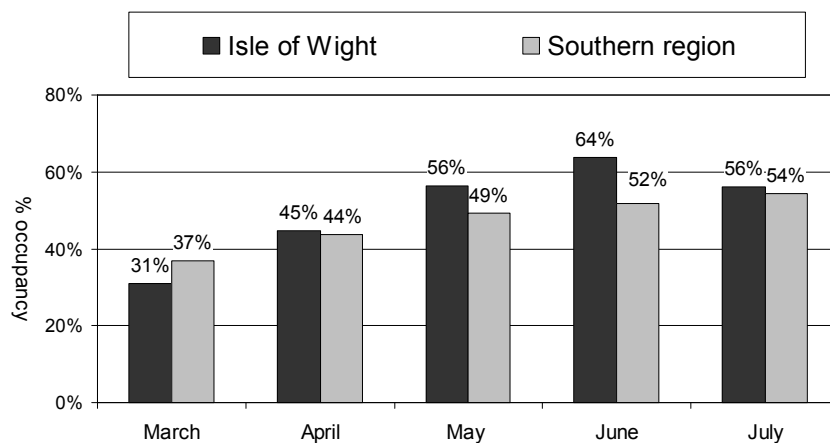
Isle of Wight hotels/guesthouses/B&B's
 Bedspace occupancy: Q2 2008 vs. previous years



*Comparative data is from varying dates; all years include Easter

The Island performed slightly better on bedspace than room occupancy against the regional average: the Island exceeded the regional average from April onwards. This is due to the Island's lower dependence upon business visitors combined with more family visitors than across the region.

Bedspace occupancy hotels/guesthouses/B&B's
 Isle of Wight vs. Southern region Q2, 2008



Whole months illustrated

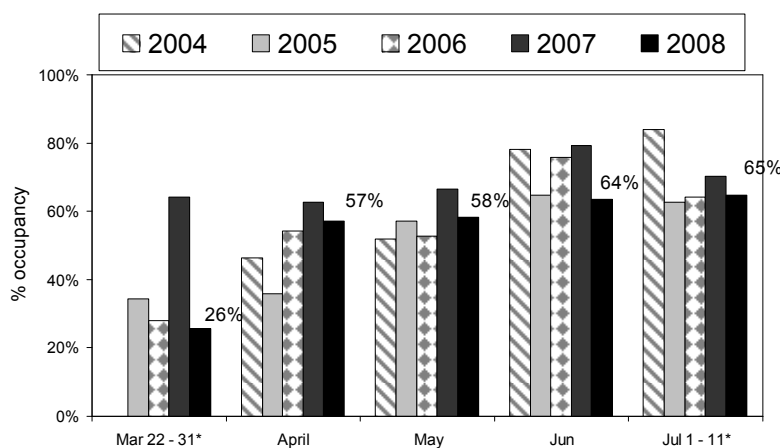
Occupancy in self catering cottages, houses and flats

Over the period, occupancy started from a low of 26% at the end of March moving up to a high point of 65% in early July. There was considerable variation in the averages achieved each month by different areas of the Island.

Occupancy in late March was much lower than last year but the gap narrowed during April. This shows the effect of the early timing of Easter and the Easter weekend being separated from the main state school Easter holidays. This impacted more on the self-catered accommodation than the serviced sector as self-catered houses/cottages/flats are much more dependent upon week long lets than short stays.

Subsequent months were down versus last year however May was 5 points above 2006 and June was back at the level seen in 2005. Early July occupancy was below last year but at a similar level to 2005 and 2006.

Isle of Wight self catering occupancy
Cottages, flats & houses
Q2 2008 vs. previous years



*Comparative data is from varying dates; all years include Easter

Occupancy in self catering chalets and static caravans

Responses to the occupancy survey have been very low with 2 chalet/static caravan sites submitting data for most of this period, hence no data can be given for this category. Data should be available in the year end report.

Occupancy on touring sites

N.B. The occupancy survey does not cover any camping associated with the music festival site.

Three camping and touring sites have responded in this survey during April, May and June and no data has been submitted for July at this stage. Data should be available in the year end report.