

Tourism trends quarterly bulletin Accommodation Statistics: Peak season 2008

Introduction

This bulletin provides an assessment of accommodation used in the peak season 2008 (July 14th to August 31st for serviced accommodation and July 12th to August 29th for self catering accommodation/camping sites). It includes reported 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; occupancy levels in self catering accommodation and touring sites. Occupancy data is taken from a survey amongst accommodation providers.

The peak season tourism monitor reported a decline in the number of staying visitors, in particular longer holiday visitors and visitors to friends/relatives, but an increase in those on short breaks, staying business trips and overseas staying visitors. This report looks at the impact of these changes on accommodation providers.

Type of accommodation used by all staying visitors

During the interview with visitors on board the ferries, staying visitors are asked about the type of accommodation they have used/will use whilst on the Island.

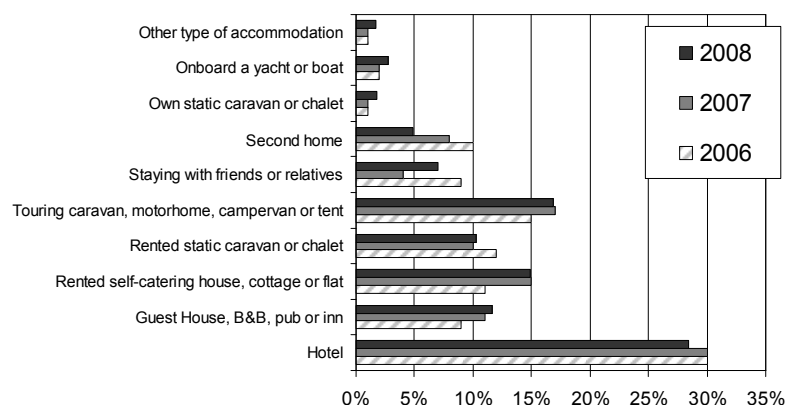
The type of accommodation used varies according to the reason for visiting the Island:

- Visitors to friends/relatives: The majority (91%) of those on VFR trips stayed with their friends or relatives; 6% used hotels or guesthouses/B&B's.
- Business visitors: Over half of all the business visitors stayed in a hotel (36%) or guesthouse/B&B (22%). Amongst those on a pure business trip, two thirds used hotels or guesthouses/B&B's. Second homes and homes of friends and relatives were used by some of those who were on a combined business and leisure.
- Holiday/short break visitors: Accommodation used by those on holidays and short breaks this year versus the last two years is shown on the chart overleaf. 40% of those on a holiday/short break used serviced accommodation, in line with last year. The remaining 60% opted for some type of self catering accommodation.
 - *Serviced accommodation:* 28% of holiday/short break visitors stayed in a hotel and 12% in B&B's or guesthouses. Use of hotels was higher amongst those on a short break (33%) than on longer holiday (17%). Serviced accommodation was much more likely to be chosen by adult only groups and by those on their first visit to the Island.
 - *Self catering accommodation:*
 - Within self catering, caravans and chalets were the most popular option, selected by almost 30%: 17% of holiday/short break visitors stayed on touring sites; 10% rented static caravans/chalets; 2% used their own static caravan.
 - 15% of short break/holiday visitors used rented cottages/houses/flats, in line with last year.
 - Families were more likely to make use of self catering accommodation than serviced accommodation.

- Use of second homes by those on holidays/short breaks declined slightly this year to 5% but there was an increase in the use of homes of friends/relatives.

(N.B. Those staying with friends/relatives stated that the purpose of their visit was a holiday or short break and not primarily to visit their friends/relatives; they may be using a second home belonging to friends/relatives.)

Type of accommodation used in peak season by those on main holidays and short breaks



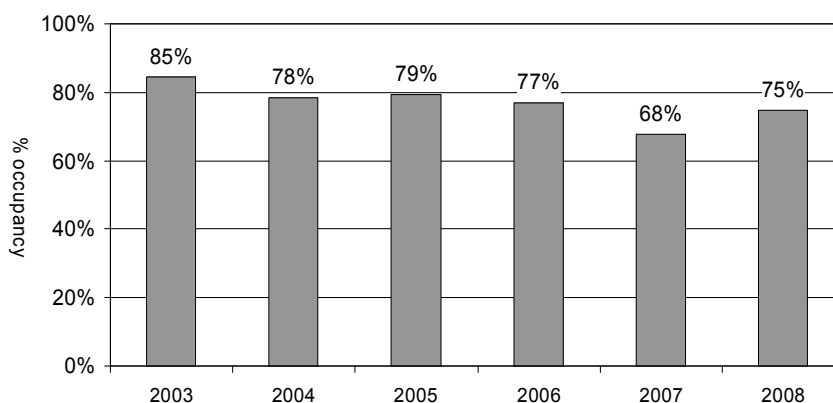
The remainder of this report looks at the occupancy as reported by a sample of hotels, guesthouses/B&B's and the rented self catering sector plus pitch occupancy on touring sites. It is estimated that these sectors make up approximately 58% of the accommodation used by visitors staying on the Island.

N.B. The number of accommodation providers responding varied across July and August but up to 101 took part. In the last couple of years the numbers taking part in this survey have declined significantly (down by around one third); primarily due to a drop in the number of serviced providers taking part. This is a problem which is also being experienced at a regional and national level but does have implications for the validity of comparisons with previous years. In addition, during this peak season, there was a low response rate from static caravan/chalet operators and from touring/camping sites.

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

Room occupancy averaged 75% during the peak season, up by 7 points on last year and returning towards the levels seen during earlier years. Occupancy was boosted by the increase in short breaks to the Island and the use of the serviced sector by these visitors.

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



The variation in occupancy across the Island and between types of accommodation is shown in the following tables.

In line with the last 2 years, Sandown had the highest peak season occupancy: at 84% this was up 7 points on last year. Other areas had considerably lower occupancy. Sandown was followed by West Wight and Newport/Cowes/Ryde at 73%.

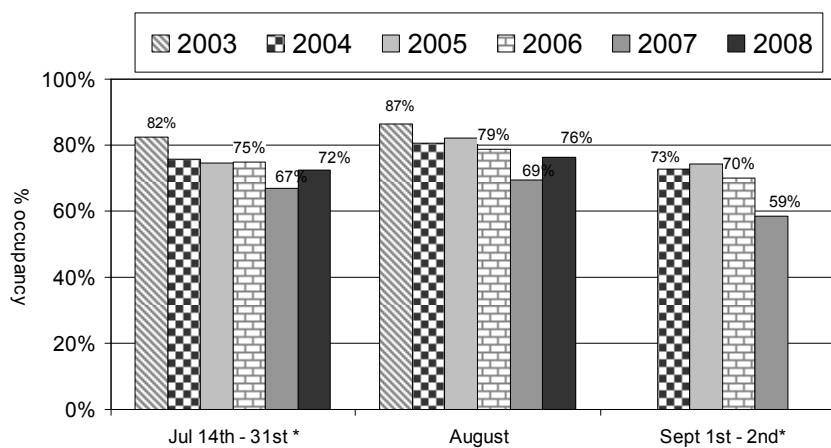
Area of Island	Room occupancy 2006	Room occupancy 2007	Room occupancy 2008
Sandown	77%	77%	84%
West Wight	76%	75%	73%
Newport/Ryde/Cowes	74%	70%	73%
Shanklin	77%	61%	71%
Ventnor	81%	74%	69%

Looking at the size of the establishment, the larger hotels achieved the highest occupancy levels, 79%, as is the norm. This was an increase of 7 points on last year. Large hotels were 13 points ahead of 4 – 10 room guesthouses.

Size of establishment	Room occupancy 2006	Room occupancy 2007	Room occupancy 2008
26 or more rooms	81%	72%	79%
11 – 25 rooms	77%	64%	70%
4 – 10 rooms	68%	63%	66%
1 – 3 rooms	68%	66%	68%

Monthly room occupancy was 72% during the second part of July, rising to 76% in August. Both months were an improvement on last year and took room occupancy back towards the levels seen in earlier years.

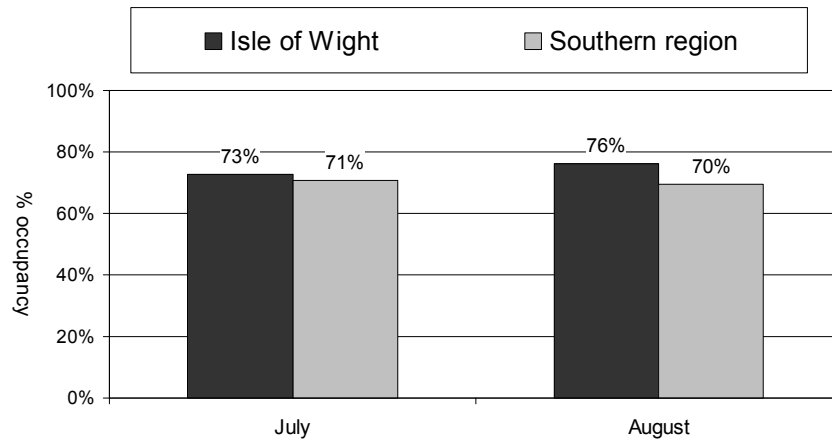
Isle of Wight hotels/guesthouses/B&B's
Room occupancy: Peak season 2008 vs. previous years



*Dates included in July and September vary slightly according to peak season timing
Peak season 2008 ended 31st August

The following chart compares monthly room occupancy on the Island with the Southern region. The Island exceeded the region's room occupancy in both July (+2 points) and August (+6 points). This is an improvement on last year when the Island fell below the region in July and was level with the region in August.

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

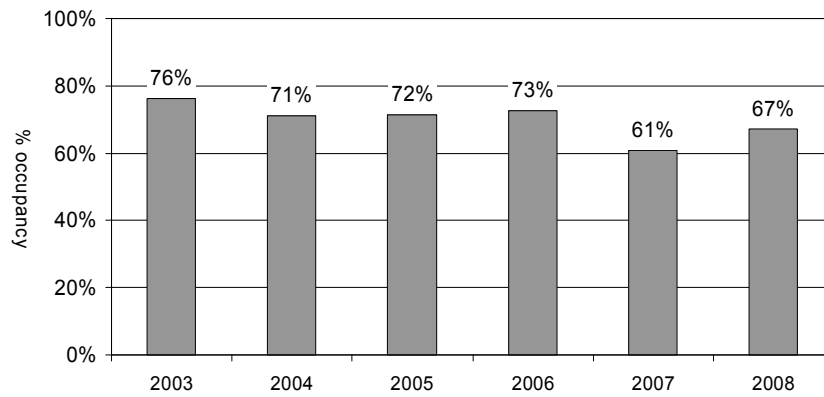


Whole months illustrated

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

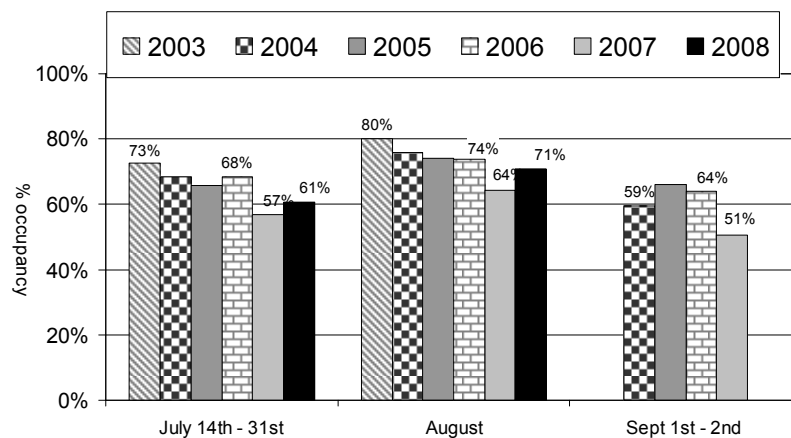
Bedspace occupancy averaged 67% across the peak season; in line with room occupancy, this is an improvement on last year, although it remains a several points below earlier years.

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



Monthly bedspace occupancy was 61% in the second half of July rising to a high of 71% in August. Both months are up on last year.

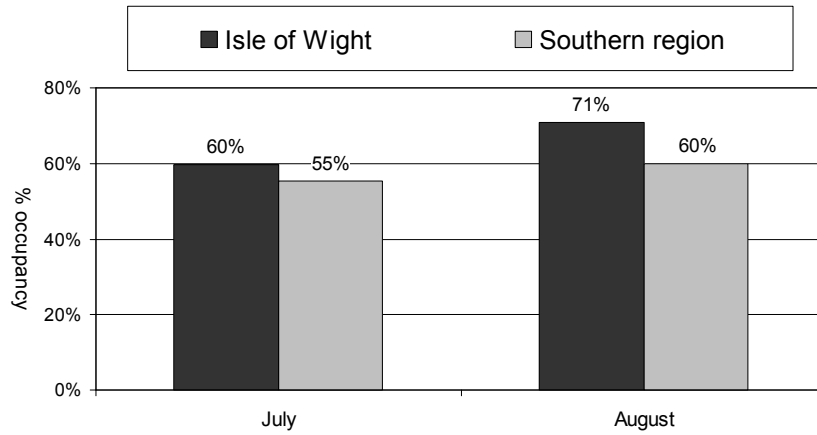
Isle of Wight hotels/guesthouses/B&B's
Bedspace occupancy: Peak season 2008 vs. previous years



*Dates included in July and September vary slightly according to peak season timing
Peak season 2008 ended 31st August

The Island outperformed the region on bedspace occupancy by a considerable margin: July was 5 points ahead and August was 9 points ahead of the region. This significant lead is due to the Island attracting a higher proportion of family holidays, more leisure travel and less business travel, which together result in larger party sizes.

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



Whole months illustrated

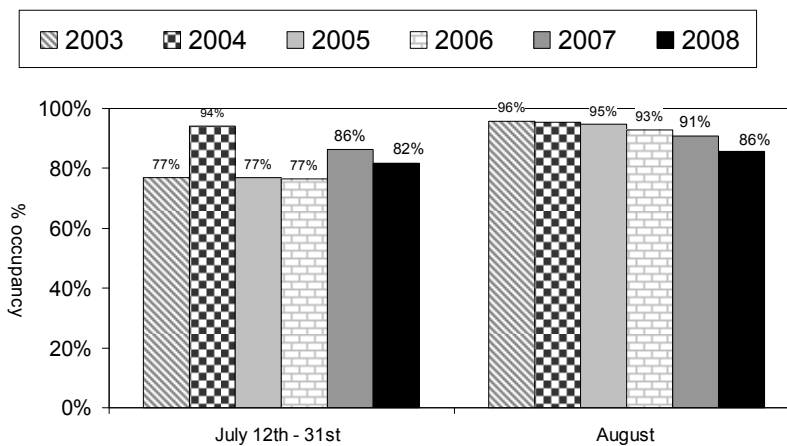
Self catering occupancy

Cottages/houses /flats

Occupancy in this sector ranged from 82% in the second part of July up to 86% in August. Both were down on last year by a similar level but August occupancy was the lowest for several years, perhaps reflecting the decline in the number of longer holidays seen during this peak season. Increased flexibility on length of stay within this sector, even at peak times, may be needed to cater for the short break market.

Shanklin outperformed other areas by a significant degree.

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



Dates in July vary slightly each year

Static chalet/caravan sites

Responses have been very low from static site operators; at this point in time only 2 have responded, hence the results may not reflect the experience across the Island. Occupancy on these static caravan/chalet sites was just under 90% in both the second part of July and August.

Reported use of static sites by visitors interviewed on the ferries indicates that use of these sites was in line with last year. (N.B. This does not take account of length of stay.)

Touring caravan/camping sites

Only 3 sites have responded to date, hence the results can only give an indication of likely occupancy levels; these may not be representative of other sites on the Island.

Pitch occupancy was at 80% in the latter part of July, up several points from July last year showing the positive effect of the better weather experienced this year. In August pitch occupancy reached 88%, in line with August last year but down on the high point seen in 2006. Again the effect of the poor weather in August this year and last year is evident.

Reported use of touring sites by visitors interviewed on the ferries suggests that use of these sites was at the same level as last year. (N.B. This does not take account of length of stay.)

