

Tourism trends quarterly bulletin  
Serviced Accommodation Statistics: Autumn 2009

Introduction

This bulletin reports on the accommodation used in the autumn period 2009 (September 7<sup>th</sup> to December 31<sup>st</sup>). It includes use of accommodation reported by visitors (taken from the research conducted on board the ferries) and occupancy levels in serviced and self catering accommodation on the Island together with comparisons with the mainland (from the occupancy survey amongst accommodation providers).

Overview

This autumn period started much later than in previous years, which affects some of the year on year comparisons.

The autumn tourism monitor, issued separately, reported on a changing mix of staying visitors. Of particular relevance to the accommodation providers was the increase in leisure breaks taken on the Island, especially short breaks, but conversely there was a decrease in staying business visits.

This autumn has seen a mixed trading period: some sectors performed better versus last year whilst others experienced a drop in business.

Use of accommodation reported by visitors

Since 2004 staying visitors have been asked about the type of accommodation they have used or intend to use whilst on the Island.

Choice of accommodation by different groups of visitors varies considerably:

- In keeping with previous years, the majority of VFR visitors stayed with friends or relatives; this year 93% did so, which is up on previous years.
- Business visitors: most business visitors used serviced accommodation - usually a hotel, 62%, but some used a guesthouse/B&B (12%). A small proportion stayed with friends/relatives (10%) or rented a house/flat or chalet (9%).

The following chart illustrates accommodation used by those ***on holidays and short breaks***, this autumn versus recent years.

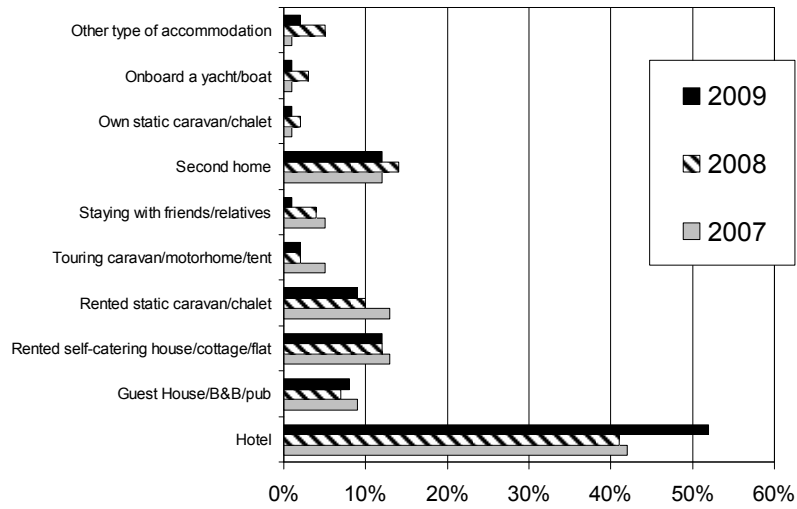
During this autumn, serviced accommodation was the most popular type of accommodation amongst those on short breaks/holidays. Over recent years there has been some decline in use of this but this autumn saw an increase in use of hotels. Over half, 52%, used a hotel and 8% a guesthouse meaning that 60% chose serviced accommodation. Use of hotels was up by around 10 points versus the last two years.

Use of static sites (static caravans and chalets) was down slightly versus last year. N.B. Over the longer term, use of rented caravans/chalets has declined due to closures of some rental sites.

Use of rented cottages/houses/flats dropped very slightly versus last year.

Use of second homes moved back to the level seen in autumn 2007, a slight reduction on last year however, at 12%, this is up from 8% in 2004.

**Type of accommodation used by visitors  
on holidays and short breaks  
Q4 2009 vs. 2007 & 2008**

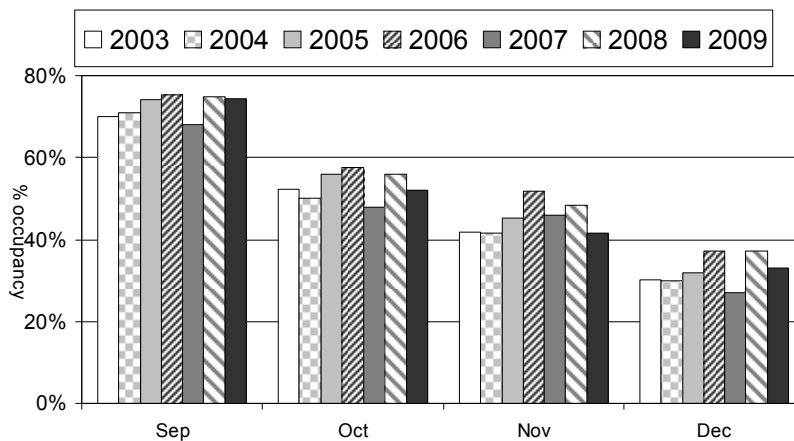


Room Occupancy in hotels/guesthouses/B&B's

During the autumn period, room occupancy averaged 56%. The season started with a high of 74% in September reducing each month down to 33% in December.

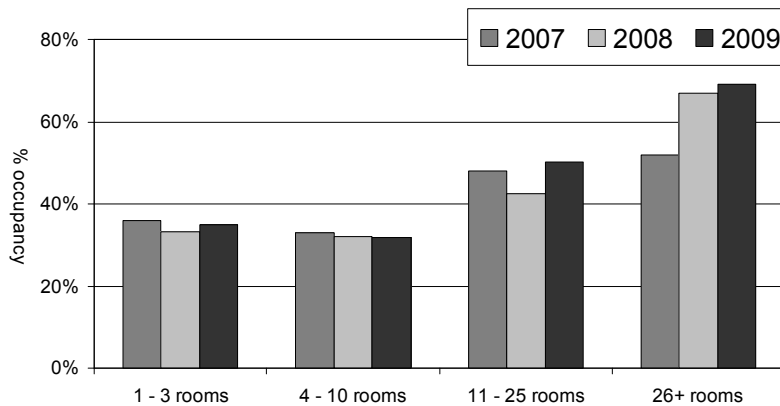
Occupancy was level with last year in September but down on last year in the following months although October and December were up on 2007.

**Isle of Wight hotels/guesthouses/B&B's  
Room occupancy: Q4 2009 vs. previous years**



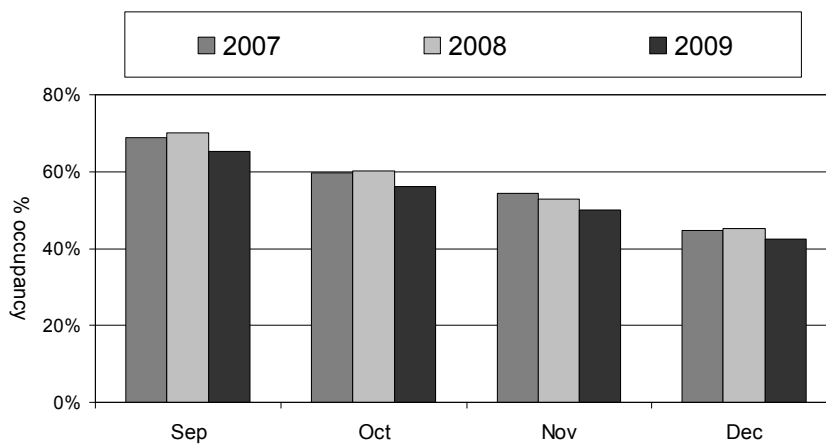
These monthly averages hide variation in performance and the chart below shows that performance varied considerably according to the size of establishment: the mid size and larger hotels (11 – 25 rooms and 26+ rooms) achieved better occupancy than last year but B&B's and guesthouses (4 - 10 rooms) achieved a similar occupancy level to last year.

Isle of Wight hotels/guesthouses/B&B's  
Room occupancy according to size of establishment:  
Q4, 2009 vs. 2007 & 2008



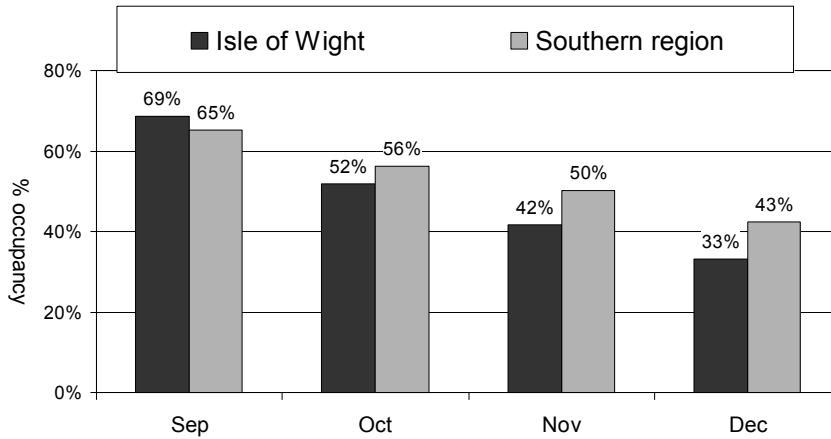
The following chart shows room occupancy across the whole of the Tourism South East region in 2009 and the previous two years. This shows that occupancy rates throughout the region have fallen slightly versus the last two years.

Room occupancy hotels/guesthouses/B&B's  
Southern region Q4 2009 vs. 2008 & 2007



The next chart compares room occupancy across the whole of the Tourism South East region with the Isle of Wight. The Island exceeded the region during the month of September and was only 4 points behind the region in October but then it dropped behind the region in November and December due to the different profile of tourism on the Island – primarily fewer business visitors and city based short break visits.

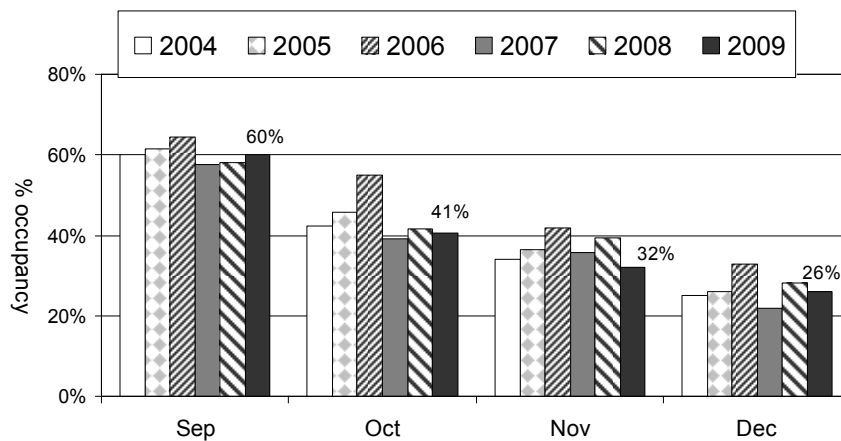
Room occupancy hotels/guesthouses/B&B's  
Isle of Wight vs. Tourism South East region Q4 2009



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

Bedspace occupancy averaged 43% during the autumn period, which is level with last autumn. This started at 60% in September, up slightly on the last two Septembers. Bedspace occupancy then reduced each month down to 26% in December. October was level with the last two years but November and December were below last year.

Isle of Wight hotels/guesthouses/B&B's  
Bedspace occupancy: Q4 2009 vs. previous years



### Occupancy in self catering cottages, houses and flats

The late timing of the August bank holiday affected the self catering sector more than the serviced sector. Occupancy was at 65% in September, significantly below September last year. In fact, the gains seen last year were eroded, and occupancy was down each month but particularly in September and November. The lowest point was 14% occupancy in November but this then doubled to 28% occupancy in December, an improvement on 2007.

