

Tourism Trends Quarterly Bulletin  
Accommodation Statistics: Winter 2007

Introduction

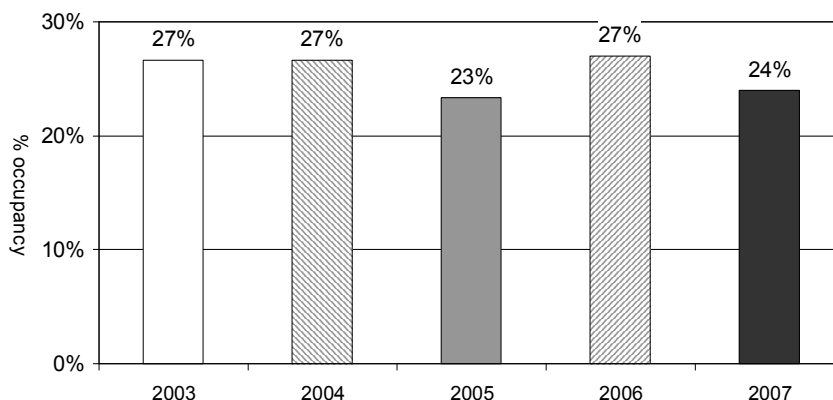
This bulletin provides the accommodation statistics for the Island and completes the tourism monitor for the pre-Easter period, from January 1<sup>st</sup> to March 25<sup>th</sup> 2007.

The visitor statistics bulletin (published separately) identified a change in the mix of visitors during this winter period. The most pertinent of these changes, for the accommodation providers, was the increase in the number of those visiting friends and relatives combined with a decrease in those taking a short break, particularly those arriving by coach. These changes combine to reduce the demand for commercial accommodation during the period.

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

Room occupancy averaged 24% over the period. Given the decline in the categories of visitors who stay in commercial accommodation, it is not surprising to see that this is below last year - a fall of 3 points - and below 2002 and 2003. Room occupancy is in line with 2005.

Isle of Wight hotels/guesthouses/B&B's  
Room occupancy: Q1 2007 average vs. previous years

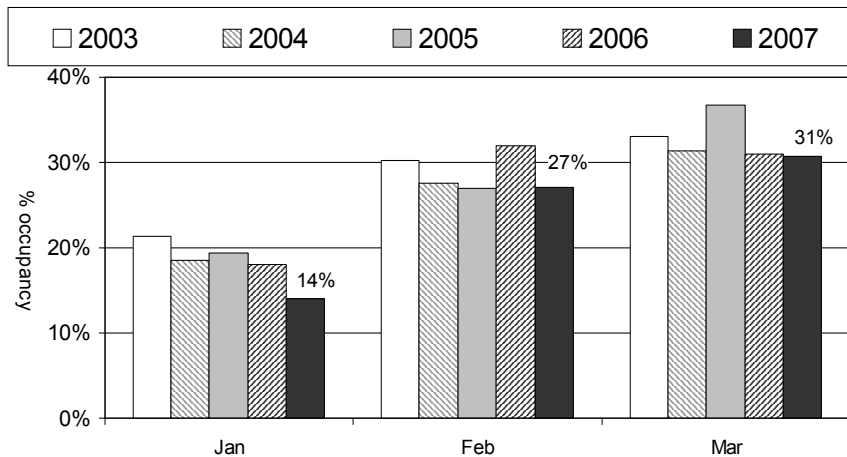


Occupancy in the Newport/Ryde/Cowes area and in Sandown held up well versus last year but significant falls were seen in other areas on the Island.

Area of Island	Room occupancy 2006	Room occupancy 2007
Newport/Ryde/Cowes	43%	42%
West Wight	30%	21%
Shanklin	27%	21%
Sandown	21%	20%
Ventnor	24%	18%

Monthly room occupancy ranged from 14% in January to 31% in March (1-25<sup>th</sup>). During January and February this was below last year: in January it was at its lowest level in the five-year period; in February occupancy returned to the level seen in 2003 and 2004. In March occupancy was level with last year and 2004 but down on 2005.

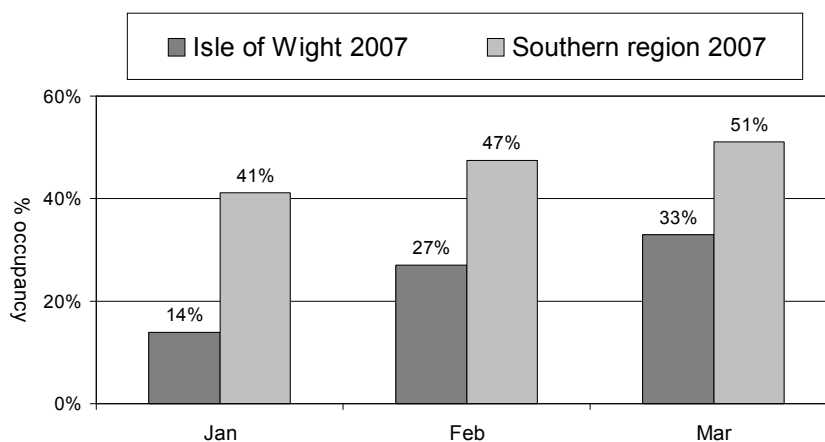
Isle of Wight hotels/guesthouses/B&B's  
Room occupancy: Q1 2007 vs. previous years



March data is for 1<sup>st</sup> – 25<sup>th</sup> in 2007; dates in previous years vary due to Easter timing

The following chart shows the comparison between the Island and the Southern region in winter 2007. At this time of year, room occupancy falls below that of the whole of the Southern region due to fewer business visitors and no city/large town destinations on the Island.

Room occupancy hotels/guesthouses/B&B's  
Isle of Wight vs. Southern region Q1 2007

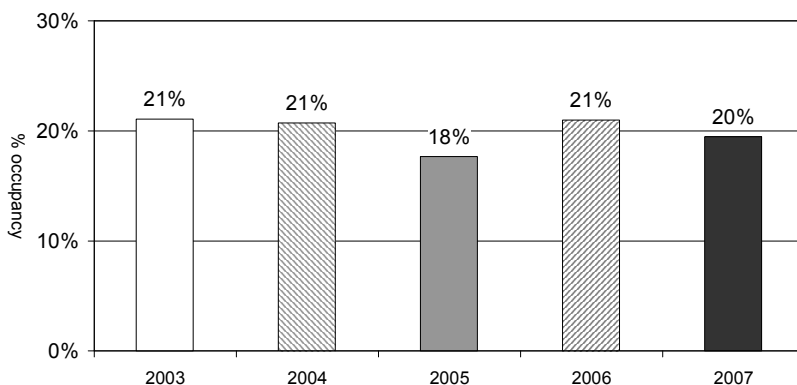


March data is for the whole month

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

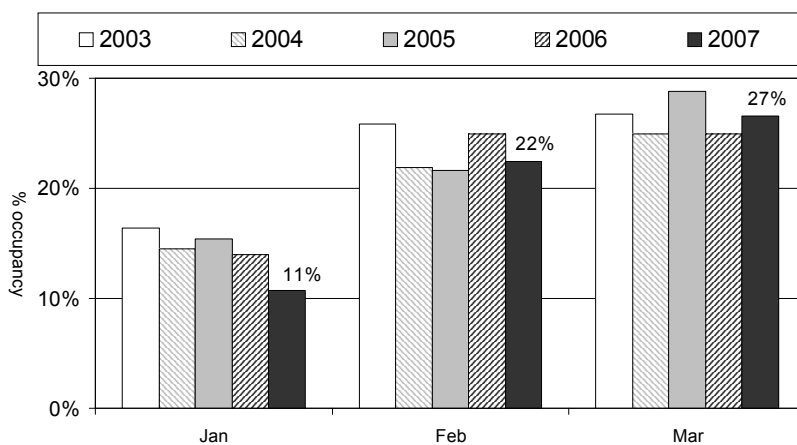
Bedspace occupancy averaged just under 20% during the winter period. This fared better than room occupancy, being down by only one point on last year.

Isle of Wight hotels/guesthouses/B&B's  
Bedspace occupancy: Q1 2007 average vs. previous years



Looking at performance in individual months, bedspace occupancy ranged from 11% in January up to 27% in March. Comparisons with recent years show that although there is a decline in January and February, this increased in March versus last year.

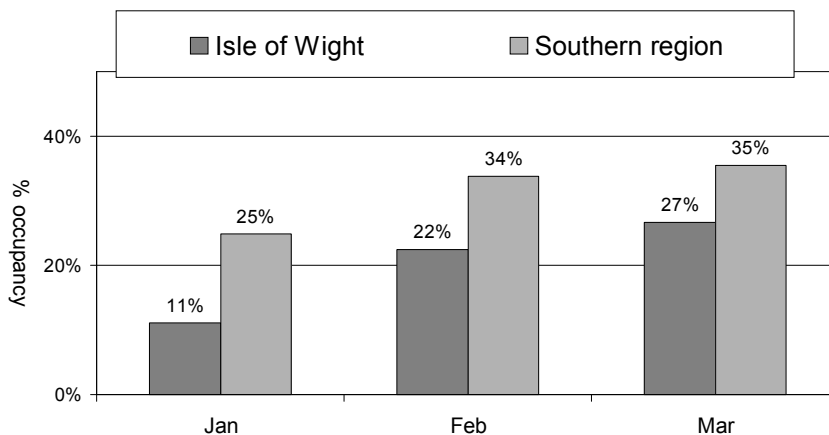
Isle of Wight hotels/guesthouses/B&B's  
Bedspace occupancy: Q1 2007 vs. previous years



March data is for 1<sup>st</sup> – 25<sup>th</sup> in 2007; dates in previous years vary due to Easter timing

The gap between the Island and the region bedspace occupancy is shown in the chart below. Whilst the region exceeds the Island at this time of year, the difference between the two is much less than for room occupancy, demonstrating how the Island benefits from larger party sizes.

Bedspace occupancy hotels/guesthouses/B&B's  
Isle of Wight vs. Southern region Q1 2007

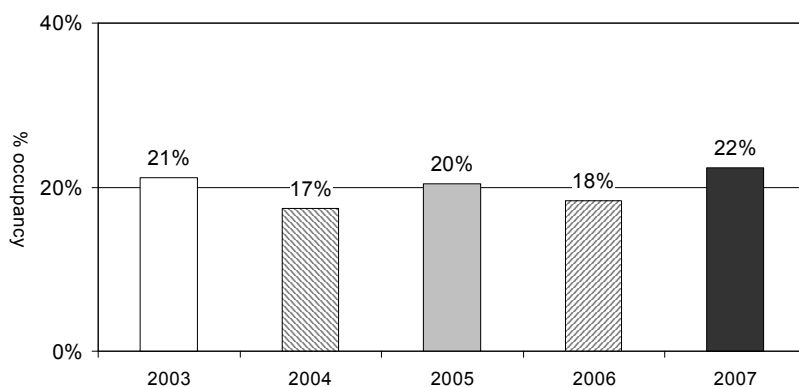


March data is for the whole month

## Occupancy in self catering cottages, houses and flats

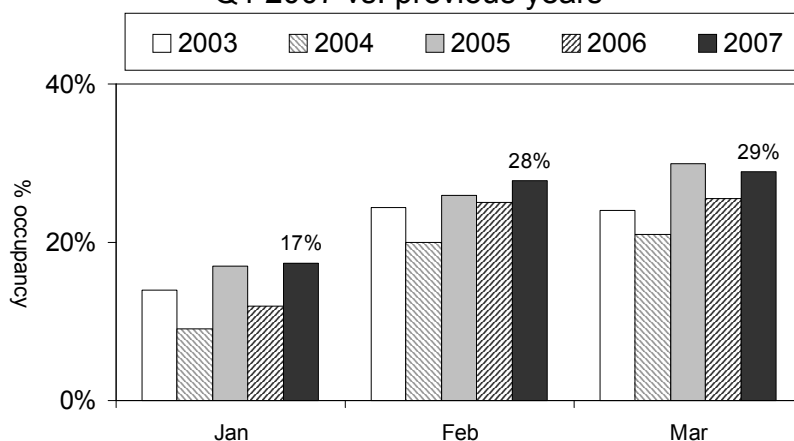
Occupancy in cottages, flats and houses reached 22% across the whole period. This increased by 4 points versus last year and is at a similar level to recent years meaning that this sector has not been adversely affected by the fall in short break visitors.

Isle of Wight self catering occupancy  
Cottages, flats & houses  
Q1 2007 average vs. previous years



Looking at occupancy by month, this reached a high point in January and February. Occupancy was up on last year in March and on a par with the previous high point, seen in 2004.

Isle of Wight self catering occupancy  
Cottages, flats & houses  
Q1 2007 vs. previous years



N.B. In January and February approximately a quarter of establishments were closed, in March a fifth were closed.

### Occupancy in self catering chalets and static caravans

Whilst there were seven chalet/caravan parks who responded to the occupancy survey, only 4 were open hence there is insufficient information to draw any conclusions on occupancy levels in this period.

### Occupancy on touring sites

None of the touring sites taking part in this survey were open in this period.