

Tourism Trends Quarterly Bulletin
Accommodation Statistics: Winter 2008

Introduction

This bulletin provides the accommodation statistics for the Island and completes the tourism monitor for the pre-Easter period, from January 1st to March 16th 2008. It includes use of accommodation reported by visitors (taken from the ferry research) 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).

This year Easter was extremely early and before the majority of the school holidays.

The visitor statistics bulletin (published separately) identified an increase in the number of staying visitors and therefore an increase in the demand for accommodation. This bulletin shows increased demand primarily for serviced accommodation.

Use of accommodation, as reported by visitors

Staying visitors, interviewed on board the ferries, are asked about the type of accommodation they have used or intend to use whilst on the Island.

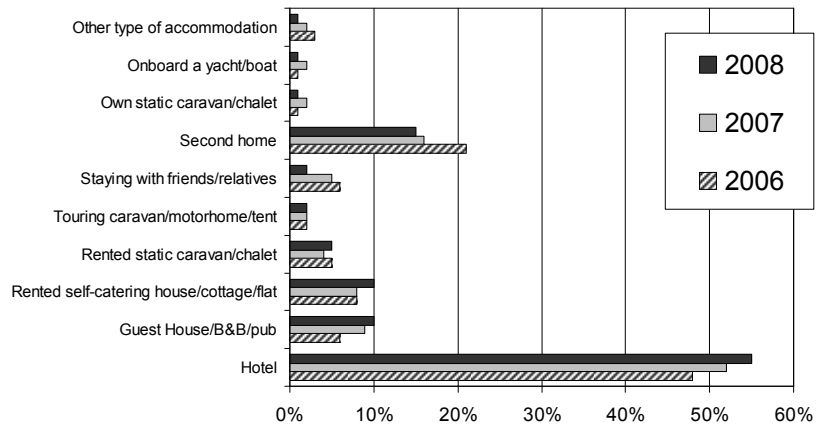
There is considerable variation in the type of accommodation used by different groups of visitors:

- The majority of those visiting friends/relatives stayed with their host (83%); a few used serviced accommodation (hotels 8%; guesthouses 4%).
- Serviced accommodation was used by two thirds of the business visitors (hotel 44%; guesthouses/B&B's 22%). 16% rented a self catering house/flat or chalet. 7% used a second home.

The following chart focuses on accommodation used by those on holidays and short breaks, this year versus recent years. At this time of year it is primarily short breaks:

- During this winter quarter, serviced accommodation was the most popular amongst those on short breaks/holidays with almost two thirds staying in a hotel (55%) or guesthouse/B&B (10%). Use of both has increased over recent years.
- 15% used second homes, down slightly versus recent years.
- 15% rented a self catering unit with more opting for cottages/houses/flats (10%) than static caravans/ chalets (5%) during these winter months.

Type of accommodation used by visitors
on holidays and short breaks
Q1 2008 vs. previous years

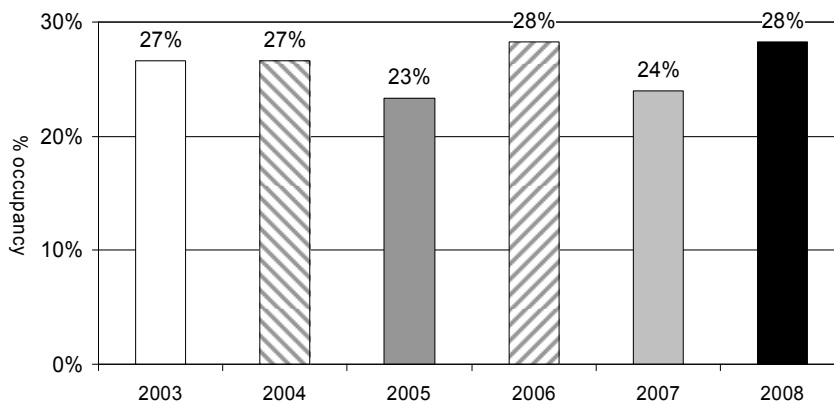


Room Occupancy in hotels/guesthouses/B&B's

A sample of 35 serviced providers took part each month. In January only 60% were open but this increased to 80% in February and 85% in March.

Room occupancy averaged 28% over the period. This is a small increase versus last year (+4 points), in keeping with the increase in short break visitors noted in the tourism statistics bulletin. Occupancy in the period has returned to the level seen in 2006.

Isle of Wight hotels/guesthouses/B&B's
Room occupancy: Q1 2008 average vs. previous years

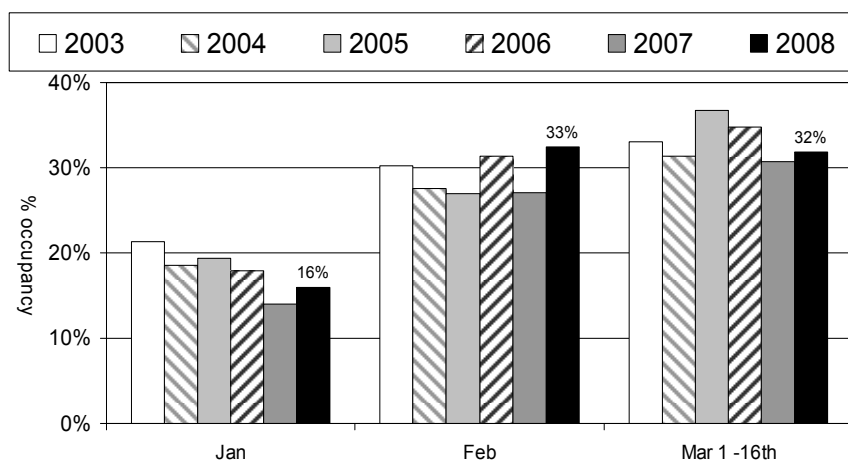


There was considerable variation in room occupancy across the Island. Occupancy in the Newport/Ryde/Cowes area was higher than other areas, in keeping with previous years, this was at 48%. Sandown increased occupancy considerably to 39%. Shanklin, Ventnor and West Wight were all much lower.

Area of Island	Room occupancy 2007	Room occupancy 2008
Newport/Ryde/Cowes	42%	48%
Sandown	20%	39%
Shanklin	21%	19%
Ventnor	18%	17%
West Wight	21%	15%

Monthly room occupancy ranged from 16% in January to 33% in February, then dropped a point in the first half of March (1-16th). Each month the level was up on 2007 and during February occupancy was above earlier years.

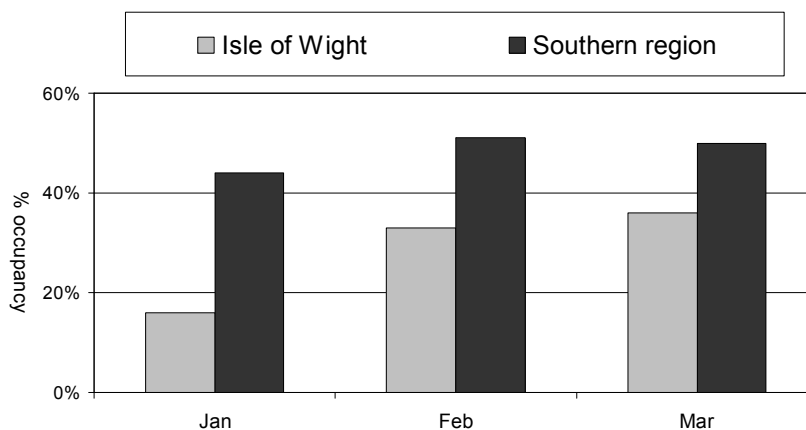
Isle of Wight hotels/guesthouses/B&B's
Room occupancy: Q1 2008 vs. previous years



March data is for 1st – 25th 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 2008. 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. However the gap between the two can be seen to be narrowing as the year progresses.

Room occupancy hotels/guesthouses/B&B's
Isle of Wight vs. Southern region Q1 2008

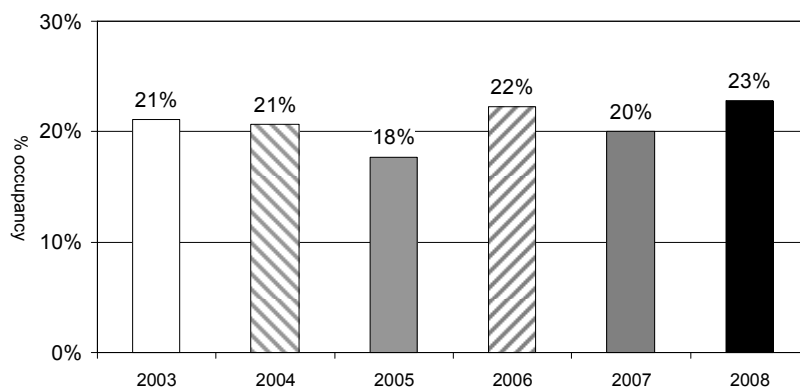


March data is for the whole month

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

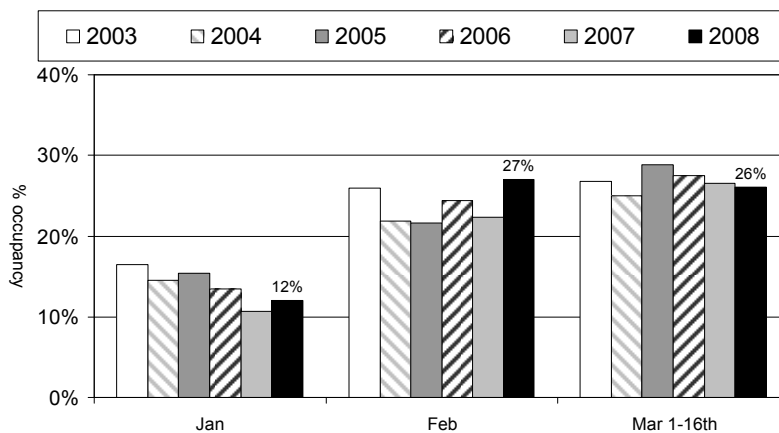
Bedspace occupancy reached 23% during the winter period. In line with room occupancy, this was a slight increase on last year.

Isle of Wight hotels/guesthouses/B&B's
Bedspace occupancy: Q1 2008 average vs. previous years



Looking at performance in individual months, bedspace occupancy started at 12% in January, rising up to 27% in February then dropping one point in the first half of March. Both January and February were up on last year with February standing out as a particularly good month versus recent years.

Isle of Wight hotels/guesthouses/B&B's
Bedspace occupancy: Q1 2008 vs. previous years



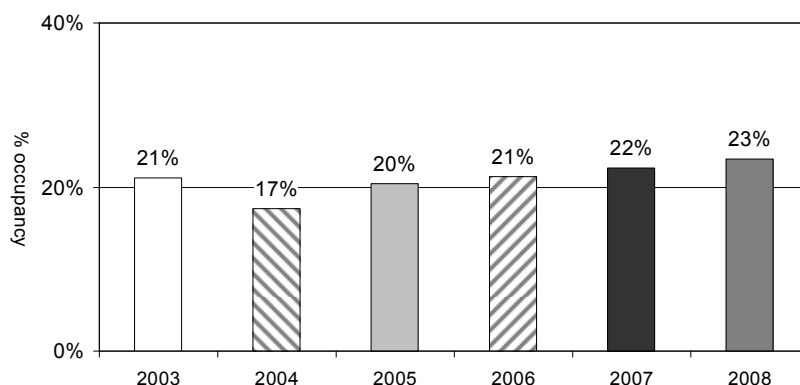
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Occupancy in self catering cottages, houses and flats

Over 50 self catering operators responded each month. In January around 10% were closed but all were open by February.

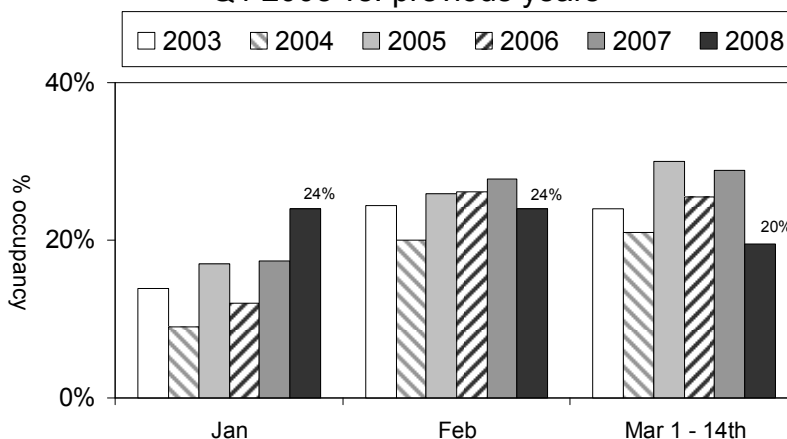
Occupancy in cottages, flats and houses reached 23% across the whole period, which is in line with last year. There has been a slight upward trend across the last four years.

Isle of Wight self catering occupancy
Cottages, flats & houses
Q1 2008 average vs. previous years



Looking at occupancy by month, this reached 24% in January, the highest level recorded in January over the 6 year period shown. It remained at the same level in February, slightly below recent years. Occupancy in the first half of March was considerably lower than previous years.

Isle of Wight self catering occupancy
Cottages, flats & houses
Q1 2008 vs. previous years



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

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.