Tourism Trends Quarterly Bulletin
Accommodation Statistics: Winter 2009

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 29th 2009. 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. In total 101 accommodation providers took part in the survey.

Easter was April 10th – 13th, later than last year. (For comparison, Easter 2008 was March 21st – 24th; 2007 was April 6th – 9th).

The visitor statistics bulletin (published separately) showed staying visitors were more or less in line with last year (-2%) but up significantly on winter 2007. Although there was no overall increase in domestic staying visitors, two categories of visitors increased: business visits and those on 5+ night holidays. It was estimated that total demand for domestic bednights, excluding trips to stay with friends and relatives was down slightly versus last year due to a slight reduction in length of stay. However, changes in length of stay varied according to visitor type: this shortened amongst business visitors but longer holidays lengthened very slightly.

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. This data does not take account of the length of stay, it just monitors the type of accommodation used. Therefore, there are some differences in the trends shown versus occupancy which is based on length of stay within a type of accommodation.

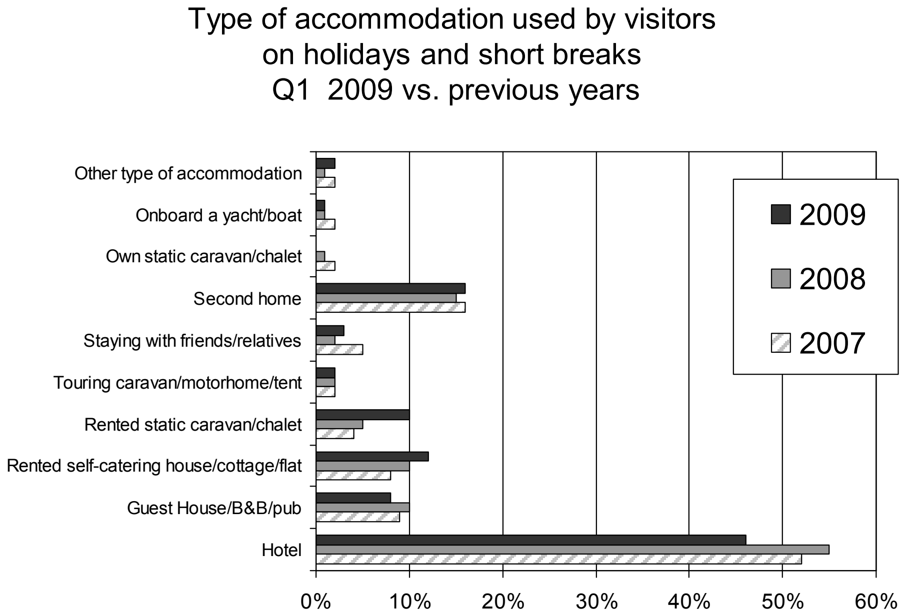
In line with previous years, the various visitor groups differ considerably in the type of accommodation they choose:

- The vast majority of those visiting friends/relatives stayed with their host (92%); this is up from 83% last year, perhaps suggesting that more people are tightening their budget when taking VFR trips. This year only a minority used serviced accommodation (hotels 4%; guesthouses/B&B's 2%).
- Serviced accommodation was used by 58% of the business visitors (pure business and combined business and leisure trips). This is down from 66% last year, with all the drop being taken by the B&B sector (hotels 46%; guesthouses/B&B's 12%). 10% rented a self catering house/flat or chalet. Use of a second home was low (2%) but 10% stayed with friends/relatives.

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

- Serviced accommodation continued to be the most popular choice amongst those on short breaks/holidays with over half staying in a hotel (46%) or guesthouse/B&B (8%). These figures are down considerably on previous years – particularly for hotels, which are down by 9 points versus last year.

- 16% used second homes, level with recent years.
- Use of self catering accommodation was up, with 22% renting in this sector: 12% rented cottages/houses/flats, similar to last year; 10% rented static caravans/ chalets, up considerably versus last year.

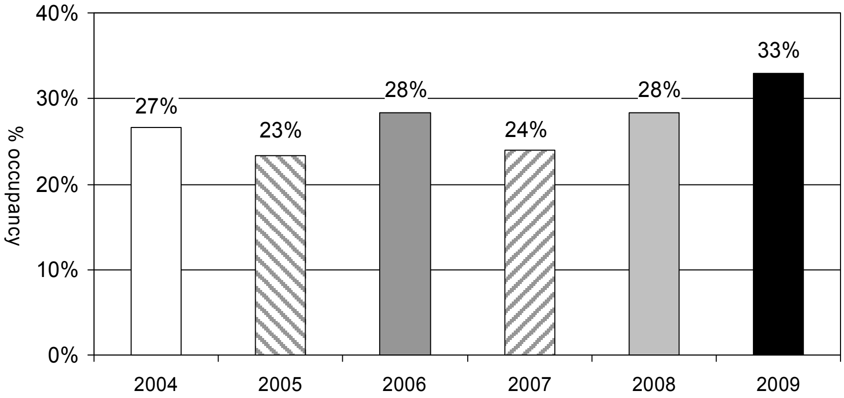


Room Occupancy in hotels/guesthouses/B&B's

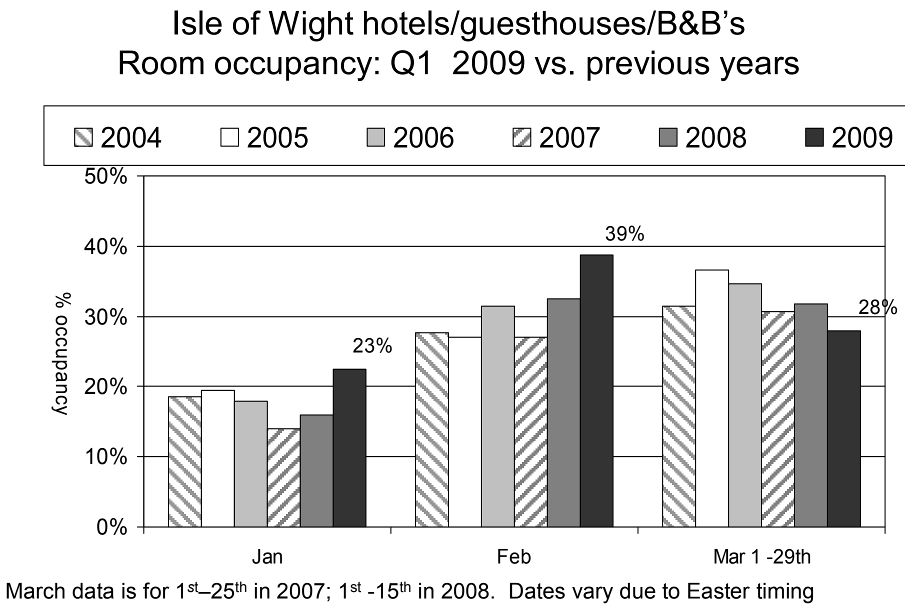
A sample of around 30 serviced providers took part each month. In January only 60% were open but this increased to nearer 90% in February, as businesses opened up for the school holidays. In early March this reduced to around 70%.

Room occupancy averaged 33% over the period. This is up by 5 points versus last year and up by 9 points on 2007. This is the best occupancy recorded in the winter quarter during the 6 year period illustrated.

Isle of Wight hotels/guesthouses/B&B's
Room occupancy: Q1 2009 average vs. previous years



Analysis of the monthly room occupancy shows that the increase in occupancy for the period is due to gains made in January and February. Early March saw a downturn versus recent years. Room occupancy started at 23% in January, increasing rapidly to 39% in February, then dropped back to 28% in March (1-29th).



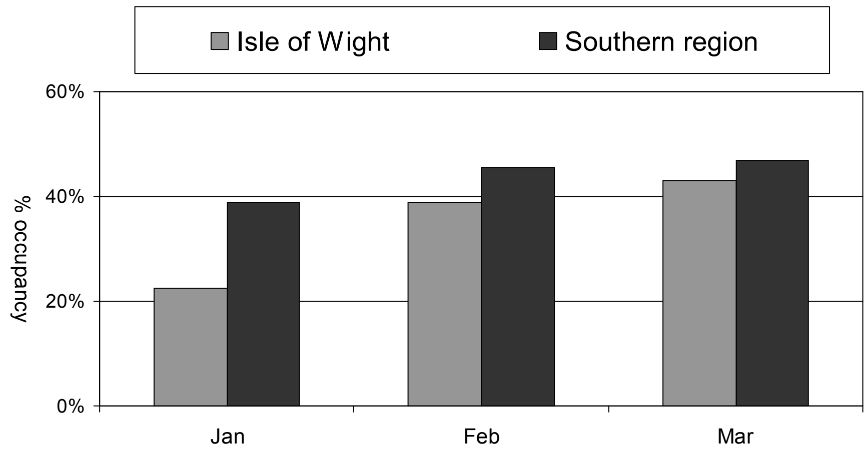
Room occupancy varied across the Island. Sandown performed particularly well with 48% occupancy; this was an increase on last year (+9 points) and on 2007 (+18 points). Occupancy in the Newport/Ryde/Cowes area was the second highest at 35% but down on previous years (-13 points vs. last year). Ventnor and Shanklin both achieved around 30% but West Wight was much lower.

Area of Island	Room occupancy 2007	Room occupancy 2008	Room occupancy 2009
Sandown	20%	39%	48%
Newport/Ryde/Cowes	42%	48%	35%
Ventnor	18%	17%	33%
Shanklin	21%	19%	29%
West Wight	21%	15%	11%

The following chart compares the Island and the whole of the Southern region in this winter period. At this time of year, it is the norm for Island room occupancy to fall below that of the whole of the Southern region due to the profile of visitors – primarily fewer business visitors- and the location - no city/large town destinations on the Island.

This winter, the Island was much closer to the regional average than is usually seen at this time of year and in March the two areas were very close in room occupancy.

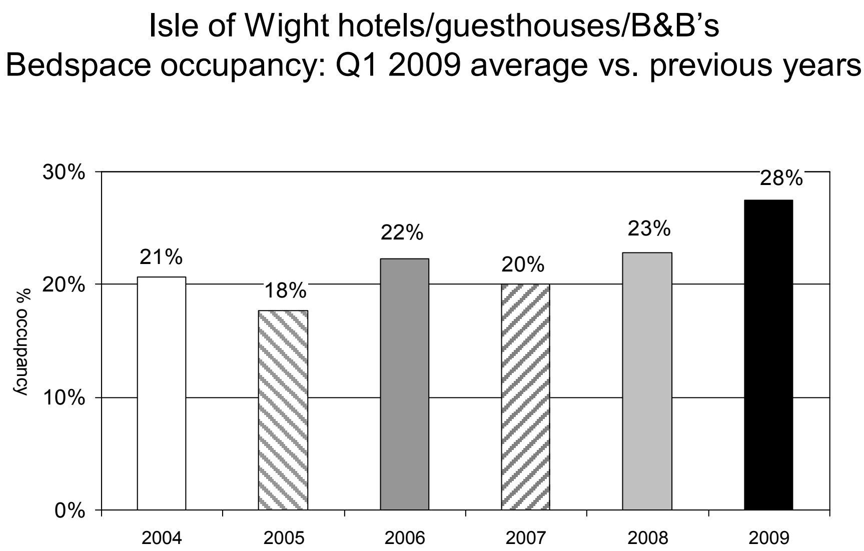
Room occupancy hotels/guesthouses/B&B's
Isle of Wight vs. Southern region Q1 2009



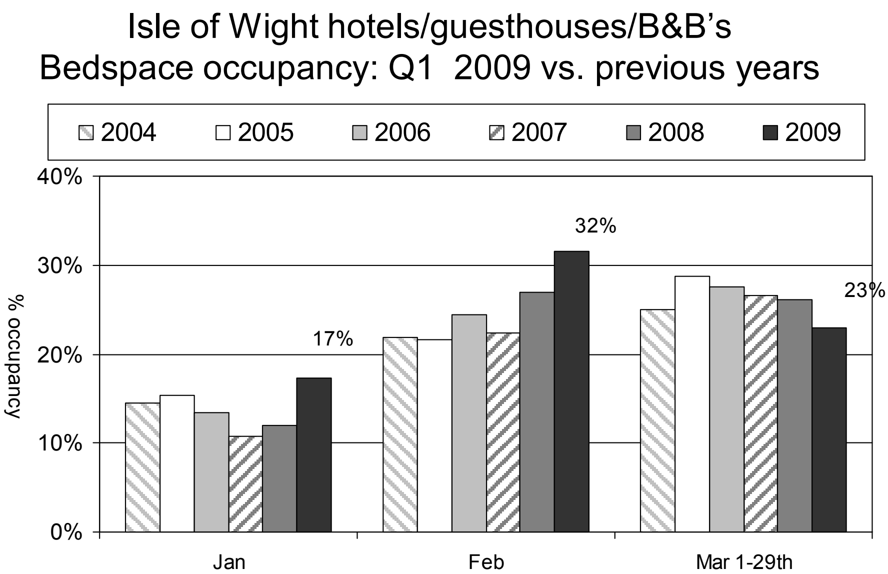
March data is for the whole month

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

Bedspace occupancy reached 28% during the winter period. This was an increase of 5 points on last year and up by 8 points on 2007, following the trend seen in room occupancy.



The pattern in monthly bedspace occupancy was very similar to room occupancy. This started at 17% in January, rising up to 32% in February then dropping back to 23% in March. Both January and February were up on last year but March (1st -29th) was below.

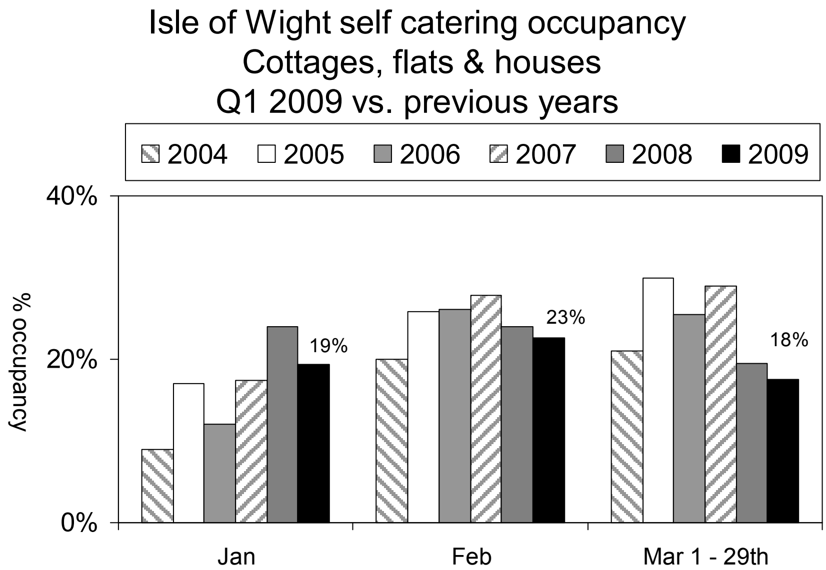


March data is for 1st–25th in 2007; 1st -15th in 2008. Dates vary due to Easter timing

Occupancy in self catering cottages, houses and flats

37 self catering operators responded in January but this exceeded 60 in February and March as many more operators opened for business.

Looking at performance by month, occupancy was at 19% in January, down on last year by 4 points but just above 2007 and earlier years. In line with previous years, this rose in February, to 23%, but remained lower than last year and earlier years. In March the occupancy dropped to 18% which is considerably lower than recent years. This was due to low levels in Shanklin and Ventor, other areas achieved occupancy in the range from 25% to 34%.



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Occupancy in self catering chalets and static caravans

Seven chalet/caravan parks responded to the occupancy survey, but in January and February most were closed. In March there were 6 open and these achieved an average of 20% occupancy. This is just a snapshot of one month and it is difficult 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.