

Tourism trends quarterly bulletin  
Accommodation Statistics: Spring 2006

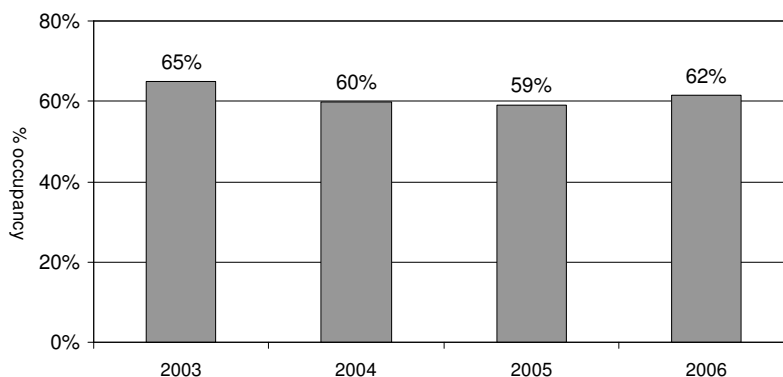
Introduction

This bulletin provides the occupancy levels in serviced accommodation on the Island for the pre-Easter period from March 27<sup>th</sup> to July 16<sup>th</sup> and up to 14<sup>th</sup> July for self catering accommodation.

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

Room occupancy averaged 62% over the period. This is up very slightly (+3 points) versus last year. It is ahead of 2004 but just below 2003.

Isle of Wight hotels/guesthouses/B&B's  
Room occupancy: Q2 2006 average vs. previous years



The resort towns of Sandown and Ventnor achieved the highest average room occupancy this quarter. Sandown was 9 points ahead of West Wight.

Area of Island	Room occupancy
Sandown	66%
Ventnor	62%
Newport/Ryde/Cowes	61%
Shanklin	59%
West Wight	57%

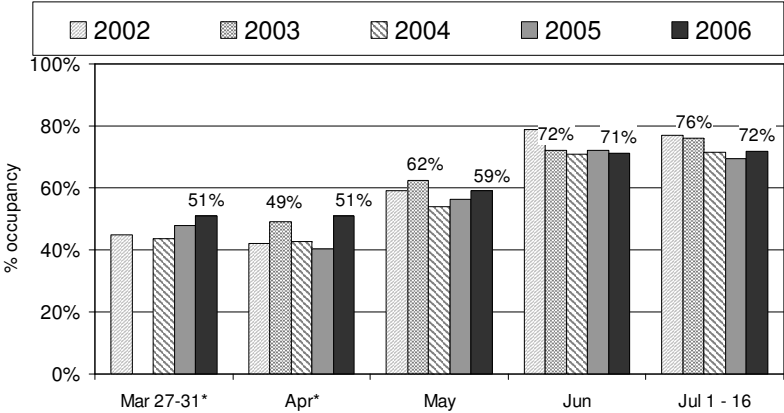
There were also differences according to the size of the establishment with the larger establishments outperforming smaller establishments by a significant margin.

Area of Island	Room occupancy
26 or more rooms	69%
11 - 25 rooms	60%
4 - 10 rooms	46%
1 - 3 rooms	48%

Monthly room occupancy ranged from 51% at the end of March to 72% in July (1-16<sup>th</sup>). The notable high of 51% seen in April reflects the timing of Easter.

Comparing monthly performance with recent years shows occupancy either on a par or slightly ahead of 2004 and 2005 each month.

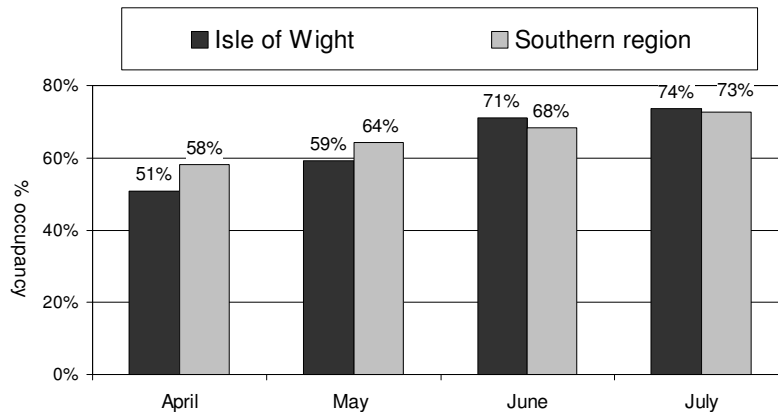
Isle of Wight hotels/guesthouses/B&B's  
Room occupancy: Q2 2006 vs. previous years



\*Comparative data is from varying dates; all years include Easter

Monthly average room occupancy can be compared with the Southern region, as shown below. Whereas the first three months of the calendar year saw the Island under performing the region by a considerable margin, during this spring period the Island does comparatively well. During April and May, occupancy on the Island fell slightly below (-7 points and - 5 points) but in June it exceeded the region by 3 points. Data for the full month of July is shown and in this month the Island is level with the region.

Room occupancy hotels/guesthouses/B&B's  
Isle of Wight vs. Southern region Q2 2006

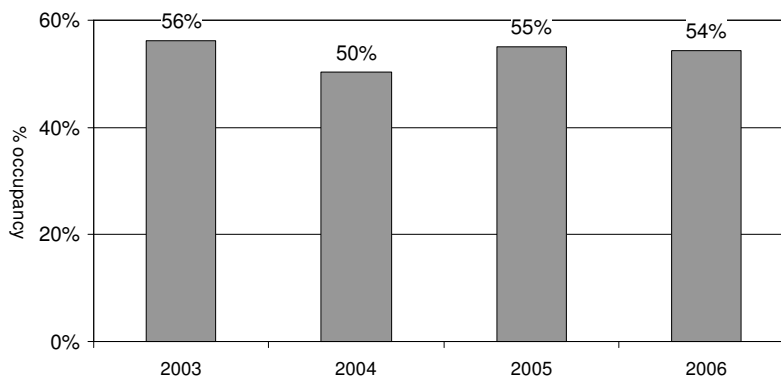


Whole months illustrated

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

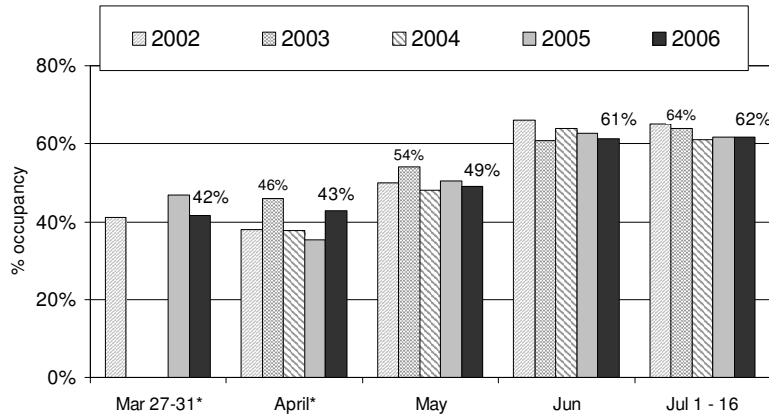
Bedspace occupancy averaged just 54% across the spring period, which is on a par with last year but up slightly versus spring 2004 (+4 points).

Isle of Wight hotels/guesthouses/B&B's  
Bedspace occupancy: Q2 2006 average vs. previous years



Looking at monthly bedspace occupancy, this ranged from 42% in late March up to 62% in the first half of July. Bed space occupancy, versus recent years, is up in April (due to the timing of Easter) but at a similar level in the following months.

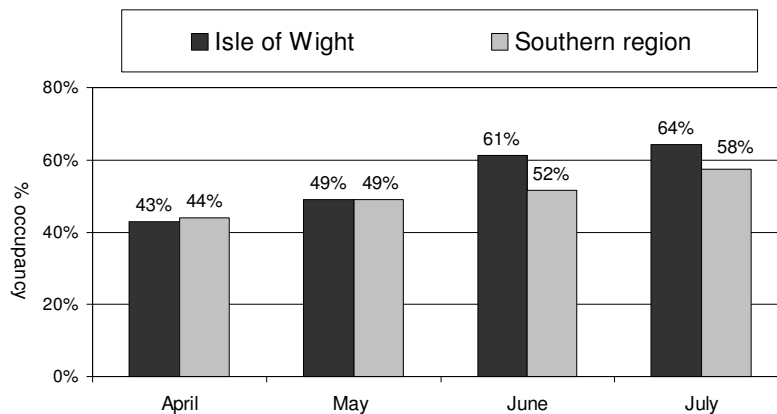
Isle of Wight hotels/guesthouses/B&B's  
 Bedspace occupancy: Q2 2006 vs. previous years



\*Comparative data is from varying dates; all years include Easter

The Island attracts larger sized groups than the region as a whole and this is reflected in the comparative average room occupancy. This is a result of less dependence on business visitors combined with more family visitors. Consequently, the Island is level with the region in April and May but significantly ahead in June and July (+9 points and +6 points).

Bedspace occupancy hotels/guesthouses/B&B's  
 Isle of Wight vs. Southern region Q2 2006



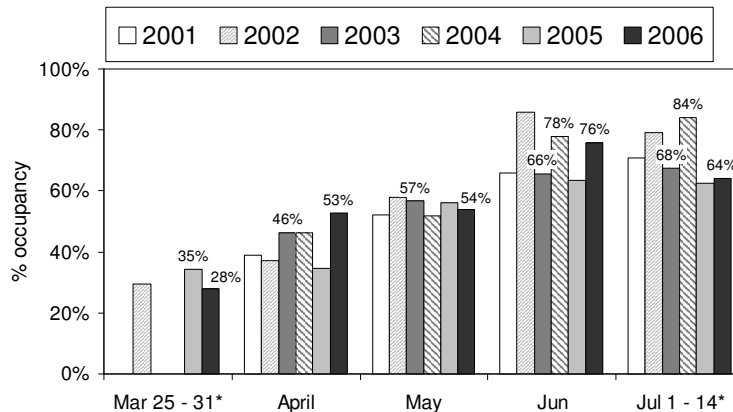
Whole months illustrated

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

Over the period, occupancy ranged from 29% in late March to a high point of 76% in June, although it fell back to 64% for the first two weeks of July.

Looking at each month: occupancy in late March was a little below last year but this was made up for by the large increase in April versus last year. These differences are due to the later timing of Easter. May was at a similar level to recent years; the month of June saw a big increase on last year and was on a par with 2004; in early July occupancy was level with last year and similar to 2003 but below the very high level achieved in 2004.

Isle of Wight self catering occupancy  
Cottages, flats & houses  
Q2 2006 vs. previous years



\*Comparative data is from varying dates; all years include Easter

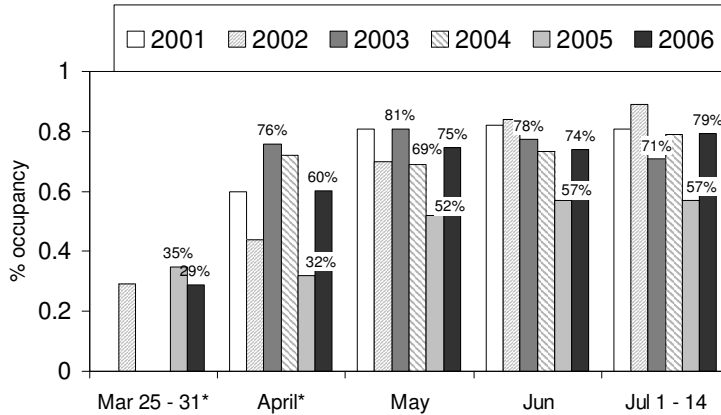
### Occupancy in self catering chalets and static caravans

Nine sites took part in the survey, this is an improvement in response rates but still remains quite a low base so data must be taken as an indication only of occupancy in this sector across the Island.

Occupancy ranged from 29% in late March up to a high of 79% in the first two weeks of July.

As with cottages and houses, the timing of Easter affected comparisons for March and April. For the following 3 months, occupancy was up significantly on last year and at a similar level to 2004.

Isle of Wight self catering occupancy  
 Static caravans and chalets  
 Q2 2006 vs. previous years



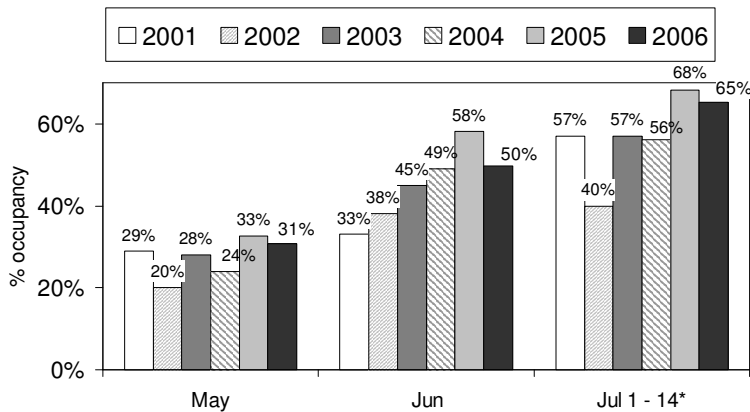
\*Comparative data is from varying dates; all years include Easter  
 \*N.B. Small sample sizes (4 operators) in 2005; 9 operators took part this year

Occupancy on touring sites

Five camping and touring sites took part in this survey, hence the figures can give only an indication of occupancy across the Island.

Occupancy ranged from 31% in May up to 65% in the first part of July. This means that, during May and July, it was at a similar level to the high occupancy levels achieved last year; however in June occupancy was 8 points lower than last year making it more in the region of previous years.

Isle of Wight self catering occupancy  
 Touring caravan and camping sites  
 May, June, July 2006 vs. previous years



N.B. Small sample sizes (5 operators) create fluctuations in data  
 \*Exact dates change each year