

Tourism trends quarterly bulletin
Accommodation Statistics: Spring 2007

Introduction

This bulletin provides the occupancy levels in serviced accommodation on the Island for the period from March 26th to July 15th and up to 13th July for self catering accommodation. This includes reported use of accommodation by visitors (taken from the ferry research amongst visitors); occupancy levels in serviced accommodation on the Island together with comparisons with the mainland, plus occupancy levels in self catering accommodation. Occupancy data is taken from a survey amongst accommodation providers on the Island, 99 of whom took part.

Both surveys indicate that there has been a small reduction in the use of serviced accommodation alongside an increase in use of self catering accommodation.

Type of accommodation used by staying visitors

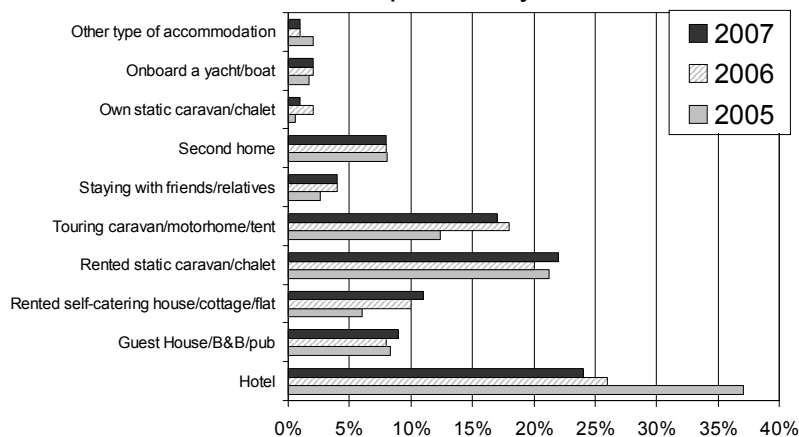
Visitors to the Island are asked about the type of accommodation they have used or are expecting to use whilst staying on the Island. This provides a view of types of accommodation that are not covered by the occupancy survey in addition to those that are.

Use of accommodation differs amongst different types of visitors:

- It is not surprising to see that 86% of those visiting friends and relatives stayed with those families but another 9% used hotels/guesthouses.
- Business visitors were most likely to use hotels (34%) and guesthouses (12%) but 13% stayed with friends/relatives whilst on a business visit. A minority of business visitors used second homes (6%), rented self catering houses/cottages/flats (5%) or chalet properties (6%).
- Accommodation used by those on a short break or holiday is illustrated below. This group use a wide range of accommodation with no one type standing out as their main choice: they were almost as likely to rent a chalet/caravan (22%) as they were to stay in a hotel (24%). The third most popular place to stay was touring caravan/camping sites (17%) followed by rented houses/cottages/flats (11%). Second homes were used by 8% of these visitors.

Over time the main change has been the dramatic reduction in the use of hotels versus 2005, which was associated with the fall in visitors travelling by coach. This has been accompanied by increases across many types of accommodation rather than a switch to one type of accommodation.

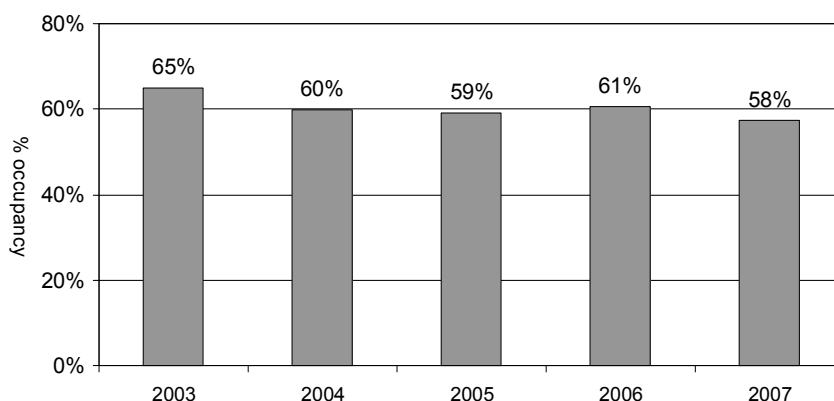
Type of accommodation used by
holiday and short break visitors
Q2 2007 vs. previous years



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

Room occupancy has remained fairly constant over the last 4 years. This year it averaged 58% over the period, which is down a little (-3 points) versus last year. This is in line with the claimed use of accommodation from the ferry survey.

Isle of Wight hotels/guesthouses/B&B's
Room occupancy: Q2 2007 average vs. previous years



Looking at the individual areas on the Island, there is considerable variation in room occupancy. West Wight, Sandown and Newport/Ryde/Cowes all performed above the average level. West Wight was 13 points ahead of Ventnor.

This is a change since last year; West Wight gained 7 points whereas Ventnor declined by 7 points.

Area of Island	Room occupancy 2006	Room occupancy 2007
West Wight	57%	65%
Sandown	65%	62%
Newport/Ryde/Cowes	60%	61%
Shanklin	58%	55%
Ventnor	59%	52%

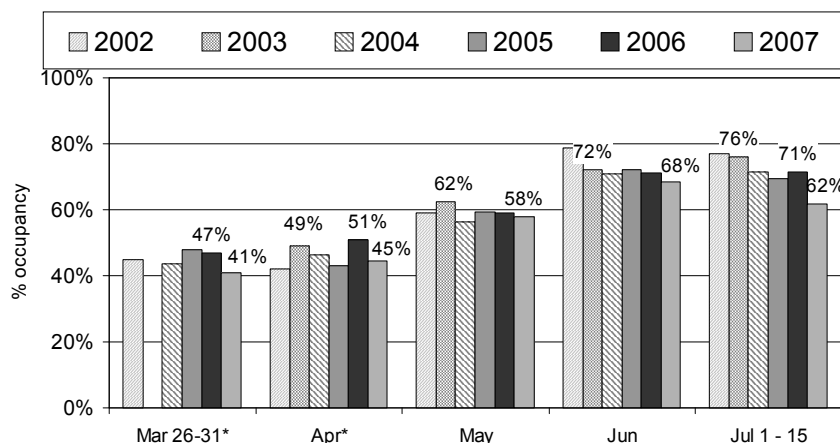
Differences also occur according to the size of the establishment. The largest establishments (26+ rooms) achieve higher occupancy levels than smaller establishments by a significant margin.

This year the smaller establishments increased occupancy versus last year: B&B's (1 - 3 rooms) increased by 5 points and those with 4 - 10 rooms were up by 4 points.

Area of Island	Room occupancy 2006	Room occupancy 2007
26 or more rooms	68%	65%
11 - 25 rooms	58%	52%
4 - 10 rooms	44%	48%
1 - 3 rooms	47%	52%

Monthly room occupancy ranged from 41% at the end of March to 68% in June. Late March and April were down versus last year whilst May and June were at similar levels to recent years. Occupancy in July was low, showing the effect of the very wet weather during this period.

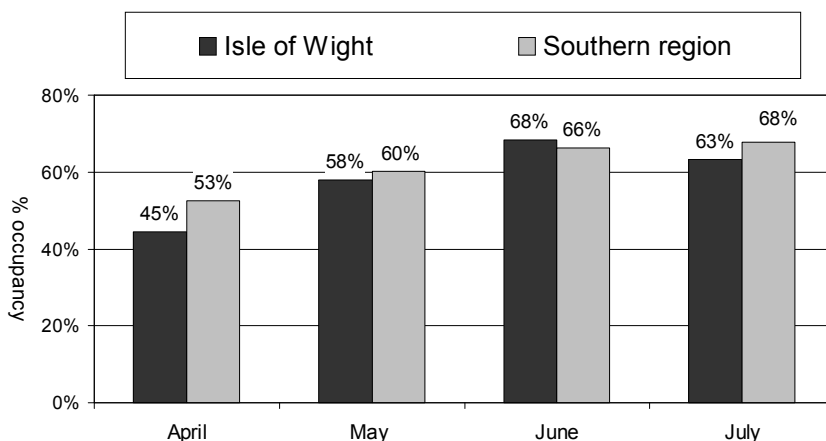
Isle of Wight hotels/guesthouses/B&B's
Room occupancy: Q2 2007 vs. previous years



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

Monthly average room occupancy can be compared with the whole of the Southern region. For most of this period, the Island achieved occupancy levels below that for the whole of the region; the difference was greatest in April (8 points below). June was an exception (the month of the music festival); occupancy on the Island exceeded the region by two points.

Room occupancy hotels/guesthouses/B&B's
Isle of Wight vs. Southern region Q2 2007

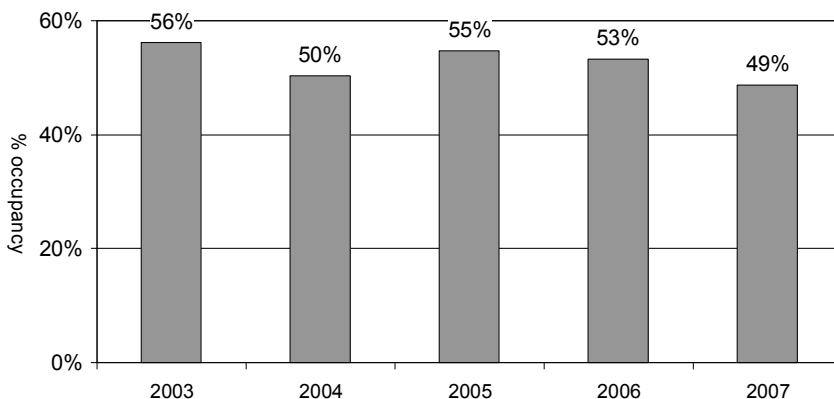


Whole months illustrated

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

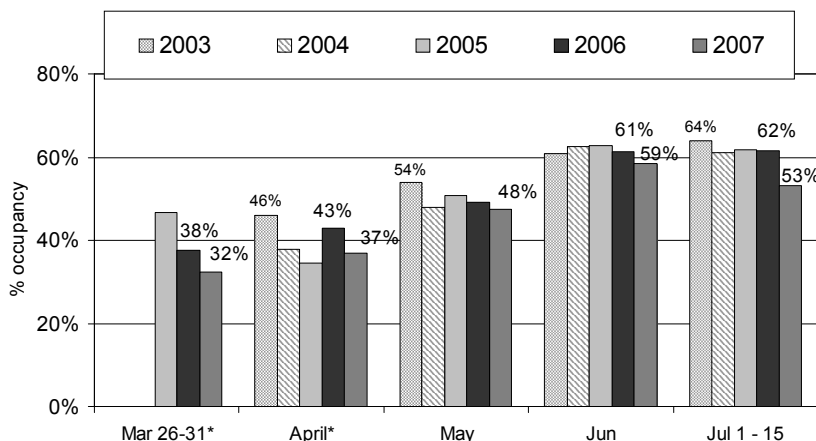
Bedspace occupancy averaged 49% during this period; this is 4 points below last year but on a par up with spring 2004.

Isle of Wight hotels/guesthouses/B&B's
Bedspace occupancy: Q2 2007 average vs. previous years



Looking at monthly bedspace occupancy, this ranged from 32% in late March up to a high in June of 59%. This dropped to 53% at the start of July. Trends over time follow a similar pattern to room occupancy.

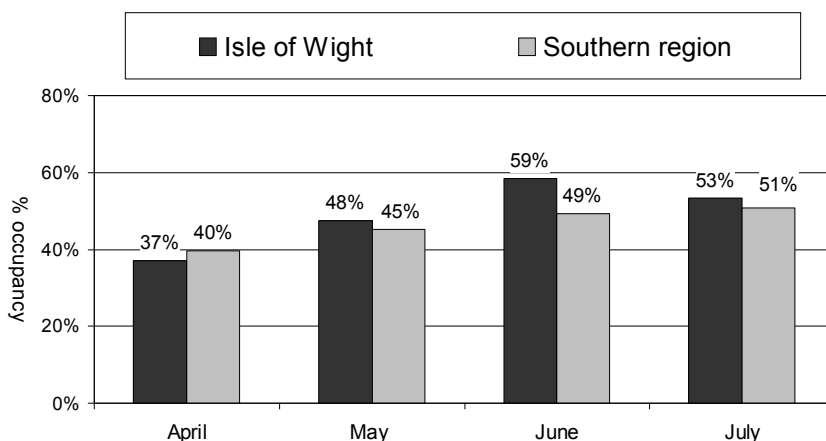
Isle of Wight hotels/guesthouses/B&B's
 Bedspace occupancy: Q2 2007 vs. previous years



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

Comparing average bedspace occupancy for the Island with the Southern region shows that the Island outperforms the region. The Island's lower dependence upon business visitors combined with more family visitors than across the region results in larger sized groups. Thus the Island exceeded the region May to July and was ahead significantly in June (+10 points).

Bedspace occupancy hotels/guesthouses/B&B's
 Isle of Wight vs. Southern region Q2 2007



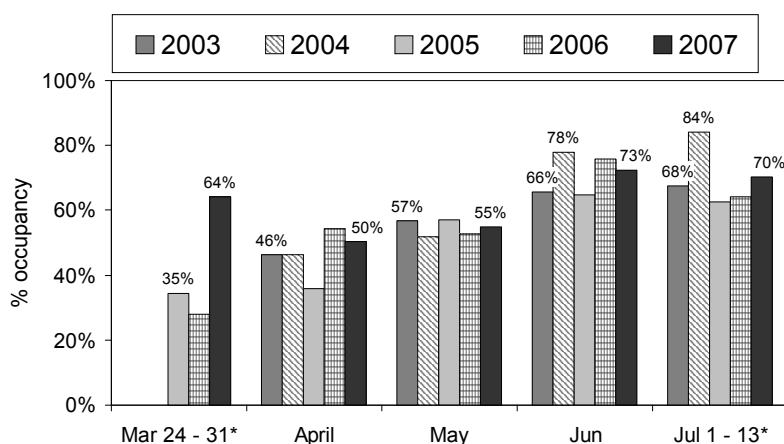
Whole months illustrated

Occupancy in self catering cottages, houses and flats

Over the period, occupancy ranged from a low of 50% in May to a high point of 73% in June, reducing very slightly to 70% in the first two weeks of July.

Looking at each month: occupancy in late March exceeded the last two years by a considerable margin (+36% versus 2006; +29% versus 2005. Easter was slightly earlier (by 8 days) which will have had some effect but this is a big increase. In April the improvement on 2005 continued although occupancy was at a similar level to last year. May was at a similar level to recent years; in June, the month of the music festival, occupancy was at a similar level to last year, maintaining the increase seen then; in early July occupancy increased versus the last two years but remains below the high level in 2004.

Isle of Wight self catering occupancy
Cottages, flats & houses
Q2 2007 vs. previous years



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

Occupancy in self catering chalets and static caravans

At this point in time only 3 chalet/static caravan sites have responded hence no data can be given for this category. Data should be available in the year end report.

Occupancy on touring sites

N.B. The occupancy survey does not cover any camping associated with the music festival site.

Only four camping and touring sites have responded in this survey during May and June and no data has been submitted for July at this stage. Data should be available in the year end report. Figures given can give only an guide to occupancy across the Island.

Reported use of touring/camping sites amongst visitors (see page 1) suggested that camping/caravanning was in line with last year and up on 2005, however the occupancy data received to date suggests pitch occupancy is lower than in recent years for the months of May and June.