

## Tourism trends quarterly bulletin Accommodation Statistics: Peak season 2007

### Introduction

This bulletin provides an assessment of accommodation used in the peak season 2007 (July 16<sup>th</sup> to September 2<sup>nd</sup> for serviced accommodation and up to 31<sup>st</sup> August for self catering accommodation/ camping sites). It 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; occupancy levels in self catering accommodation and touring sites. This data is taken from the occupancy survey amongst accommodation providers.

A total of 124 Isle of Wight accommodation providers took part in this survey. This is down from 160 in the peak season last year (-23%) due, primarily, to a significant drop in the number of serviced providers returning their forms. This is a problem which is also being experienced at a regional and national level but does have implications for the validity of comparisons with previous years.

### Type of accommodation used by staying visitors

During the interview with visitors on board the ferries, staying visitors are asked about the type of accommodation they have used/will use whilst on the Island.

The type of accommodation used varies according to the reason for visiting the Island:

- VFR visitors: The majority (90%) of those on VFR trips stayed with their friends or relatives; 7% used hotels or guesthouses.
- Business visitors: Almost half of these stayed in a hotel (33%) or guesthouse/B&B (14%) and this figure rose to 6 in 10 amongst those on a pure business trip. Other types of accommodation used included rented houses/flats; second homes and homes of friends and relatives were used by some of those who combined business and leisure.

The chart overleaf shows accommodation used by those on holidays and short breaks this year versus the last two years.

Serviced accommodation was used by two fifths of the holiday/short break visitors with the remaining 60% using a variety of self catering accommodation.

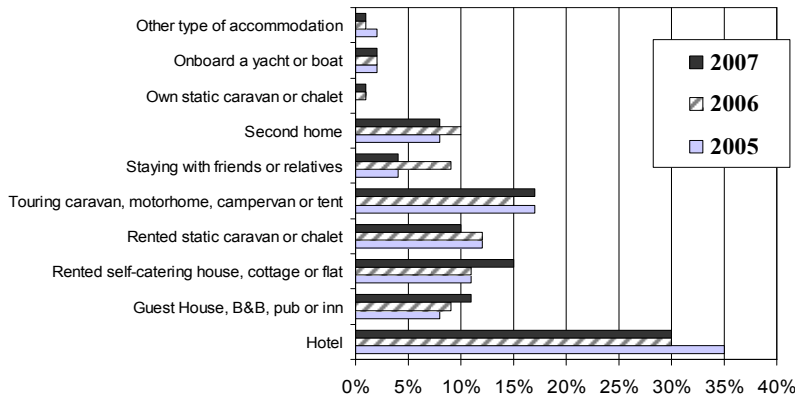
### Serviced accommodation:

- 30% of holiday/short break visitors stayed in a hotel and 11% in B&B's or guesthouses. Those on a short break were much more likely to opt for a B&B/guesthouse whereas longer holiday visitors were more likely to choose a hotel. Use of hotels has remained static versus last year and down on 2005 but use of B&B's/guesthouses has increased over the same period.

### Self catering accommodation:

- Within this sector, caravans and chalets were very popular: 17% of holiday/short break visitors stayed on touring caravan sites and another 15% used static caravans/chalets. There has been a little fluctuation over time but use of these is broadly in line with previous years.
- Use of rented cottages/houses/flats increased this year, up to 15% of short break/holiday visitors.
- Use of private homes (second homes and homes of friends/relatives) declined slightly this year to 8% and 4% respectively of short break/holiday visitors. (N.B. Those staying with friends/relatives have stated that the purpose of their visit was not primarily to visit their friends/relatives and may be using a second home belonging to friends/relatives.)

Type of accommodation used in peak season  
by those on main holidays and short breaks



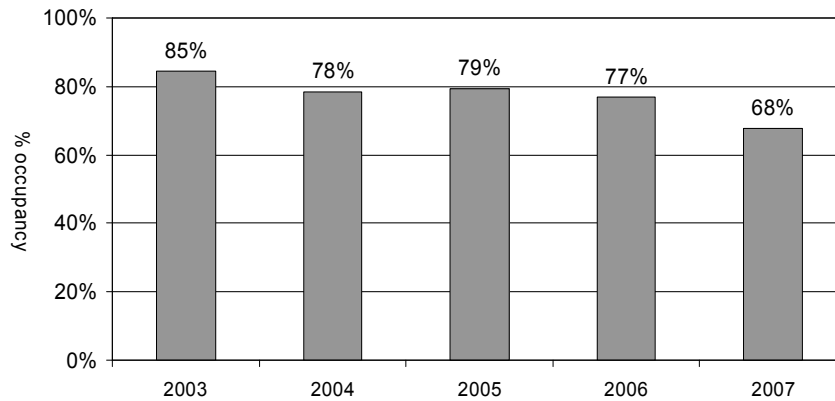
The remainder of this report examines the occupancy reported by a sample of hotels, guesthouses/B&B's and the rented self catering sector plus pitch occupancy on touring sites. It is estimated that these sectors make up approximately 55% of the accommodation used by all staying on the Island.

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

Room occupancy averaged 68% through the peak season. After a period of fairly consistent occupancy in recent years, this is down by 9 points from last year's average. Across the whole Southern region, room occupancy dropped by 3 points this year. A combination of factors will have caused this fall including:

- Amongst those visiting on holidays/short breaks, there was a higher proportion of families this year versus last year - families have a higher propensity to use self catering accommodation;
- Business visitors make up only a small proportion of total visitors at this time of year but this group do make use of the serviced sector. This year a higher proportion of business visitors were combining business and leisure rather than on a pure business trip and this sub group make less use of the serviced sector.

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



The variation in occupancy across the Island and between types of accommodation is shown in the following tables.

The main resort town of Sandown had the highest occupancy at 77%, in line with last year. This was closely followed by West Wight at 75% and Ventnor at 74%.

Looking at changes versus last year, the significant decline in room occupancy seen this year is due to falls experienced in Ventnor, Newport/Cowes/Ryde and Shanklin.

Area of Island	Room occupancy 2005	Room occupancy 2006	Room occupancy 2007
Sandown	83%	77%	77%
West Wight	82%	76%	75%
Ventnor	78%	81%	74%
Newport/Ryde/Cowes	78%	74%	70%
Shanklin	76%	77%	61%

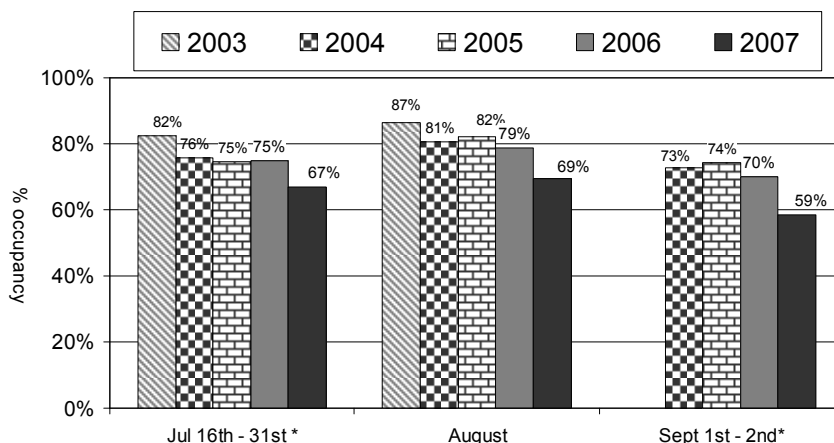
The usual pattern of occupancy according to the size of the establishment was seen: the larger establishments achieved the highest occupancy levels, outperforming smaller hotels/guesthouses by 9 points. Small B&B's performed slightly better than the small hotels/guesthouses.

In the medium and larger hotels performance was down considerably versus last year whereas B&B's achieved similar occupancy to last year.

Area of Island	Room occupancy 2005	Room occupancy 2006	Room occupancy 2007
26 or more rooms	85%	81%	72%
11 - 25 rooms	76%	77%	64%
4 - 10 rooms	67%	68%	63%
1 - 3 rooms	77%	68%	66%

Monthly room occupancy was 67% during the second part of July, rising to 69% in August. It fell back to 59% in the first few days of September. These levels are much lower than in recent years.

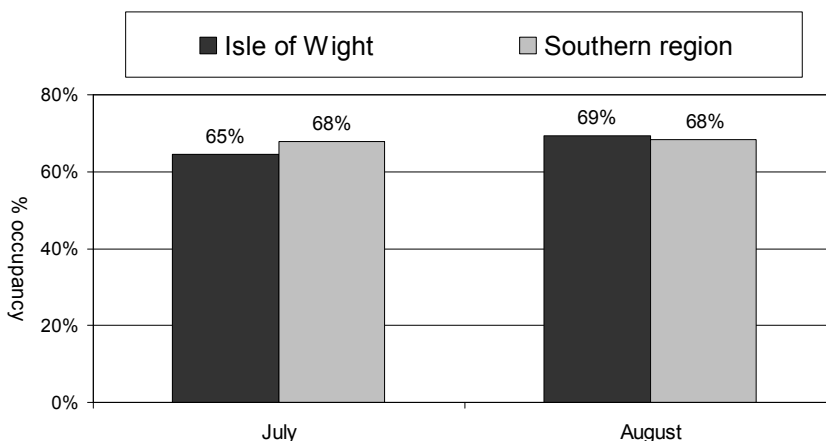
Isle of Wight hotels/guesthouses/B&B's  
Room occupancy: Peak season 2007 vs. previous years



\*Dates included in July and September vary slightly according to peak season timing

The following chart compares monthly room occupancy on the Island with the Southern region. Traditionally the Island exceeds the region's room occupancy in August but this year room occupancy was at a similar level to the region in July and August. Last year room occupancy exceeded the region by 8 points.

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

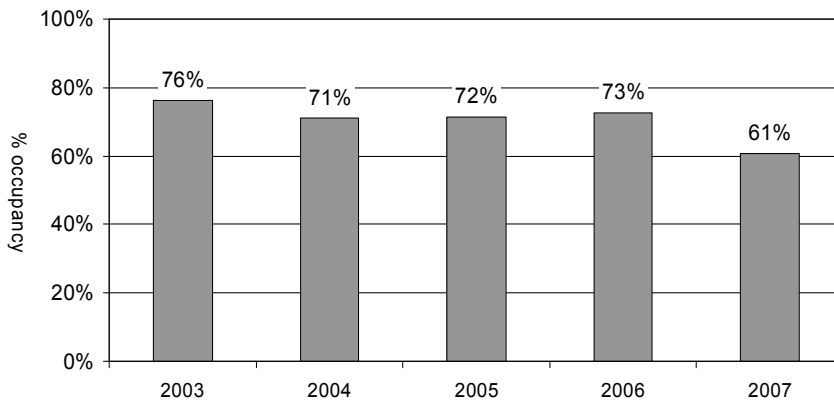


Whole months illustrated

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

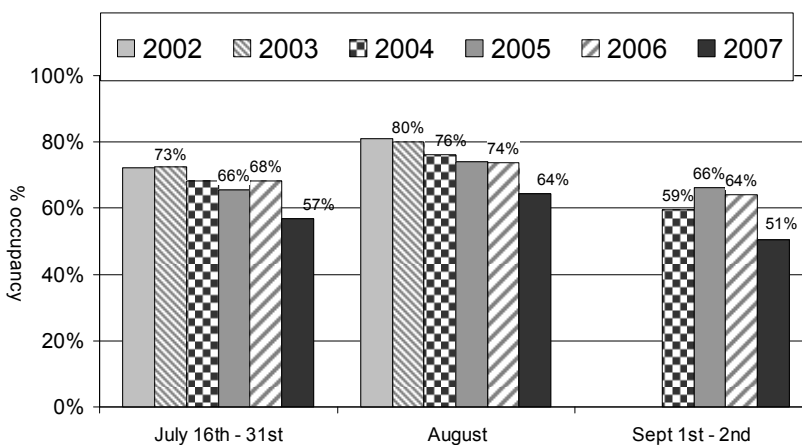
Bedspace occupancy averaged 61% across the peak season; as seen with room occupancy, this is down significantly on previous years. A similar drop in occupancy was seen across the whole Southern region.

Isle of Wight hotels/guesthouses/B&B's  
Bedspace occupancy: Q3 2007 average vs. previous years



Analysis of monthly bedspace occupancy shows this was 57% in the second half of July rising to a high of 64% in August but dropping back at the start of September.

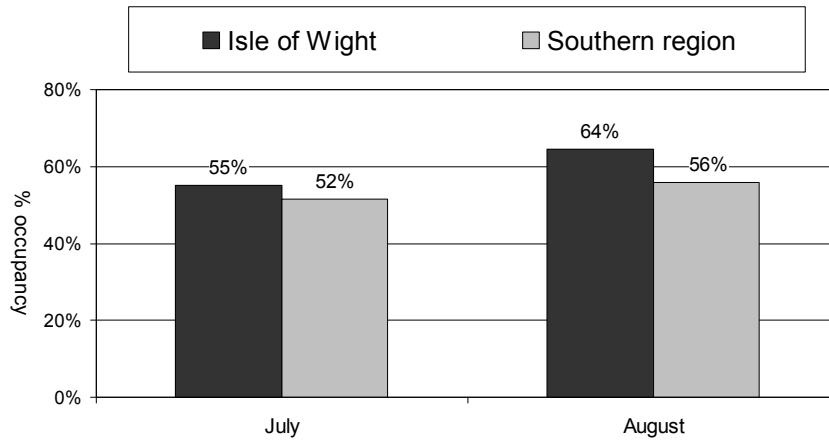
Isle of Wight hotels/guesthouses/B&B's  
Bedspace occupancy: Peak season 2007 vs. previous years



Dates included in July and September vary according to peak season timing

Bedspace occupancy compared favourably with the Southern region: the Island was just ahead of the region in July and 8 points ahead in August. The Island outperforms the region at this time of year because it attracts more leisure travel and less business travel, resulting in larger party sizes. A higher incidence of family holidays contributes to the improved bedspace occupancy in August.

Bedspace occupancy hotels/guesthouses/B&B's  
Isle of Wight vs. Southern region Q3 2007



Whole months illustrated

### Self catering occupancy

Self catering occupancy is given for the months of July and August.

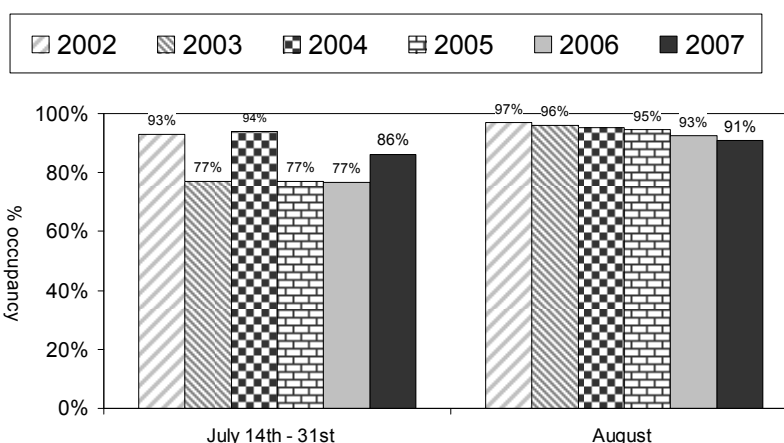
All three sectors of the self catering market indicate that there is limited availability during the month of August.

### Cottages/houses /flats

Occupancy in this sector ranged from 86% in the second part of July rising to 91% in August. Across the whole quarter this is an average occupancy of 90%, which is just ahead of the period last year. Occupancy exceeded the average in Sandown, Shanklin and Ventnor. Compared to the serviced sector room occupancy, this is 21 points ahead in July and 22 points ahead in August.

Looking at performance over time, occupancy in July was up slightly on the last two years, in August it was at a similar level to last year but down slightly on earlier years.

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



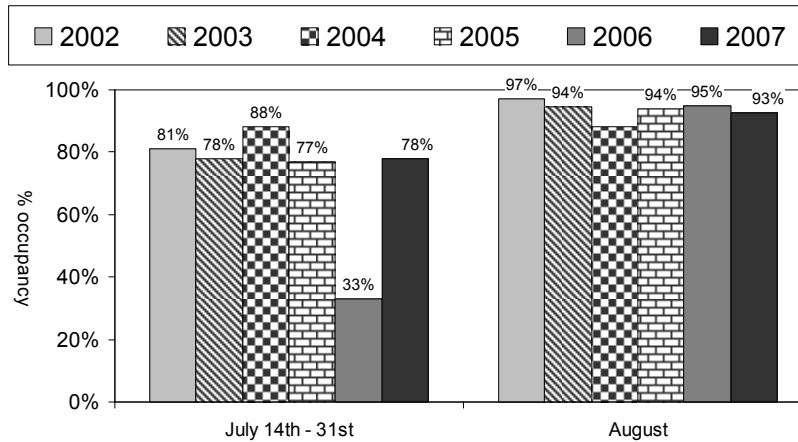
Dates in July vary slightly each year

### Static chalet/caravan sites

Sample sizes are much smaller for static sites than for houses cottages and flats: only 5 operators responded, 2 representing sites with 1- 10 units, 3 representing sites with 11+ units. Only West Wight and Newport/Cowes/Ryde are represented, hence the results must be treated with caution.

Occupancy on static caravan/chalet sites was at 78% in the second part of July rising to 93% in August. These were in line with recent years with the exception of July last year which was affected by a poor performance by one operator.

Isle of Wight self catering occupancy  
 Static caravans and chalets  
 Peak season 2007 vs. previous years



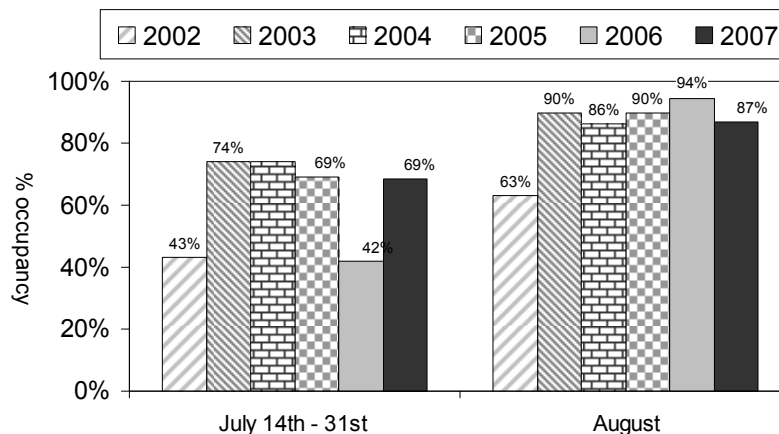
N.B. Small sample sizes which create large fluctuations in data  
 Dates in July vary slightly each year

Touring caravan/camping sites

N.B. The small sample (4 sites) responding to the survey for touring caravans and tents means data should be interpreted with caution as these may not be representative of all sites on the Island; small samples can cause fluctuations which do not reflect reality.

Pitch occupancy at these four sites ranged from 69% in the latter part of July to 87% in August. In July the average pitch occupancy was similar to 2005 but much higher than July last year. In August pitch occupancy increased to 94%; this is slightly lower than the high point seen last year but at a similar level to earlier years.

Isle of Wight self catering occupancy  
 Touring caravan and camping sites  
 Peak season 2007 vs. previous years



N.B. Small sample sizes which create large fluctuations in data  
 Dates in July vary slightly each year