

How's the tourism economy today? Accommodation survey results 2008

Overview

For the second year running the Wealden tourism survey was conducted by Wealden's Economic Development and Tourism Team. The Survey aims to establish a baseline assessment of occupancy levels and factors that have most affected accommodation businesses in Wealden, with this year's Survey focusing on the financial year 2007/08.

A total of 213 Wealden tourism accommodation providers were sent the postal survey. These included Bed and Breakfasts, Guest Houses, Self Catering establishments, Hotels, Youth Hostels, Pub accommodation and Camping and Caravan Parks. Of the 213 Surveys sent out, 30 were returned, a 14% respondent rate.

Occupancy levels

All accommodation providers were asked for winter and summer season records of their occupancy levels for the financial year 2007/2008. Across all types of accommodation serviced and non-serviced, summer occupancy levels are far higher than occupancy levels in the winter season, averaging an overall occupancy rate of 57.6%.

B&B's and Guest houses

From the summer and winter breakdown, the summer months occupancy rate achieved an average of 60% whilst the winter occupancy averaged 29%. The overall room occupancy rate for the year averaged 45%. This is slightly lower compared to Tourism South East's (TSE) records for East Sussex, of 51.8% in 2007 decreasing to 49.2% in 2008 based upon serviced accommodation. Whereas if TSEs records are compared to just Quality Assessed B&Bs and guest houses in Wealden the occupancy rates are on par at 51% for 2007/2008.

In relation to the overall occupancy rate for the previous year to this year, 43% of businesses saw an increase in occupancy rates, with the increase averaging 16%. Whilst 36% of B&Bs occupancy rates stayed the same and 21% saw a decrease in occupancy rate, averaging a decrease of 8%.

Self catering

From the summer and winter breakdown, the summer months occupancy of 83% decreasing by 33% for the winter months to 50%. For Self-Catering establishments the average occupancy rate for the year was 73%.

When comparing the records with the previous year, 29% of establishments recorded an average increase in occupancy rates of 13%, whilst 57% of the self catering establishments overall occupancy rate stayed the same, and 14% of establishments recorded an average decrease of 20%.

Camping and Caravanning

The average occupancy rate for the time that the campsites are open is 55%. Broken down into summer and winter occupancy, the summer months averaged 57% whilst winter was on average 10%. However this does not represent a true record of occupancy for caravan and campsites as the large majority of them have to close for a period during the winter, mostly November through to February/March.

When contrasting this years records to the year before no caravan and campsites recorded less visitors, positively 29% of the campsites recorded an increase in occupancy, this increase was an average of 30%, whilst the remaining 71% recorded a similar occupancy rate year on year.

Market Demand

The busiest season for the large majority of Wealden's establishments ran from May to August. With many remaining fairly busy during September and October. For most establishments December through to February was the off peak season. The peak days across all types of accommodation were Fridays and Saturdays.

B&B's and guest houses

Peak days are Fridays and Saturdays, highlighting the demand in the area for weekend breaks. Mondays and Tuesdays were for most B&Bs the quietest days of the week, whilst equally Wednesdays, Thursdays and Sundays were more off peak than peak for most businesses.

Self Catering

The peak days were Fridays, Saturdays, Sundays and Mondays. Off peak were Wednesday and Thursday. This pattern reveals the difference in how self catering bookings vary compared to B&Bs (self catering generally requiring a minimum of 3/4 nights booking).

Camping and Caravan Parks

During the open season Fridays, Saturdays and Sundays that were the busiest days, with the rest of the week generally regarded as off peak.

Peak seasons for camping and caravanning parks are highly influenced by good weather. All responses reported their sites to be busiest during July and August, whilst some parks have a longer season peaking from June to September.

Average cost of accommodation

Bed and Breakfast

- For B&Bs in the area the average bed space provided by Bed and Breakfasts in Wealden is 4-6.
- The average price for a single room per night during the summer months in Wealden is £37 compared to the Winter months of 2007/2008 where the average slightly increases to £39,
- For a twin room in the summer the average price is £54 whilst in the winter the cost averages £66.
- A double room averages £66 during the summer and increases to an average of £75 in the winter season.

The increased price during winter is due to some establishments closing in winter, as some B&Bs are run as a hobby as opposed to a business.

Self catering

- On average each self catering establishment can cater for 8 people.
- During the summer the average cost per week is £554.00.
- During the winter the average cost per week is £390.00.

Camping and Caravanning

- The average bed space found on a caravan and campsite is 48.
- The average cost is £10 per night per pitch from March to October.

Origin and type of visitor

Accommodation establishments were asked where their guests came from and for their guests main reason for staying in the area.

Bed and Breakfast

UK	84%
Germany	3%
Belgium	3%
Netherlands	2.5%
US	2%
Other (Japan, New Zealand, Australia and Canada)	2%
France	1.5%
Spain	1%
Italy and Ireland	1%

Culture/heritage	34%
Visiting friends and relatives	25%
Holiday/short break	17%
Weddings	13%
Walking/cycling	5%
Business	5%
Study	1%

Self catering

UK	78%
Netherlands	8%
Other (Includes: Australia, Canada, Japan, China and Norway)	5%
Germany	4%
US	3%
Belgium	1%
France	1%

Holiday/short breaks	35%
Visiting friends and relatives	17%
Walking/cycling	16%
Other (relocation, home improvements and visiting gardens)	15%
Culture/heritage	11%
Weddings	4%
Business	2%
Study	1%

Camping and caravanning

UK	85%
France	5%
Netherlands	3%
Germany	3%
US	2%
Ireland	2%

Holidays/short breaks	50%
Visiting friends & relatives	20%
Walking/cycling	20%
Culture/heritage	7%
Weddings	2%
Business	1%

The origin of the visitors was generally the same regardless of whether or not the establishment is Bed and Breakfast, Self Catering, or a Camping and Caravan Park. The largest majority of guests came from the UK and several countries in Europe making up the remaining %.

The reason for visiting Wealden varied more so in comparison to the type of accommodation. For example Culture/Heritage was the main attraction for staying visitors in B&Bs with 34% whereas guests staying in Self Catering and Camping and Caravan Parks this was much lower.

Advertising

Accommodation providers were asked which Trade websites that they advertise with. Many use a combination of websites.

Bed and Breakfast

50% of B&Bs in the District advertise with Visit Sussex
29% advertise with Enjoy Sussex
29% advertise with Smooth Hound
43% advertise with Other*

*Includes: Own website, Touristnet.com, Lewes and Country Town, Sawday, Best B&B, Stillwell and Heart of Kent.

Self Catering

44% advertise with Enjoy Sussex
67% advertise with Visit Sussex
89% advertise with Other*

*Includes: Own websites, 1066 Country, Sawday, Responsible Tourism, EnjoyBritain.com, Eastbourne Guide, Freedom Holiday Homes and holidaylettings.co.uk

Caravan and Camping

29% advertise with Visit Sussex
29% use Other*

*Includes: A range of camping and caravanning websites

Factors affecting business

The businesses were asked what they thought were the factors that most positively and negatively affected their performance.

Self-catering, B&B's and guesthouses felt that their businesses had been positively affected by marketing and website improvements as well as the exchange rate fluctuations. The weather was the greatest determinant of demand for most businesses especially camping and caravan parks, followed by energy costs as impacting on business overheads.

B&Bs and guest houses

For B&Bs and guest houses in the District, the most positive factors affecting business were:

1. Improved website 43%
2. Property Improvements 36% and Exchange Rate 36%
3. Increased/ better marketing 29%, closely followed by weather 21%, British economy 21%, and more visitors coming to the local area 21%.

The negative factors affecting a number of Wealden's B&Bs and guest houses, these were:

1. Weather 57%
2. Energy costs 43%
3. Exchange rate and British economy both 21%
3. Transport problems and rate of inflation both 14%

Self catering

Whilst self catering businesses were affected slightly differently, positive factors were:

1. Increased/ better marketing 56%
2. Exchange rate, property and website improvements 33%
3. More visitors coming to the local area and other* 11%

* word of mouth

They indicated that the main negative factors were:

1. Weather 56%
 2. Exchange rate, new competitors in area and energy costs 33%
 3. Transport problems and other* 11%
- *no rural business support from council

Camping and Caravan Parks

The parks experienced a slight variation in positive and negative affects, they felt they were positively affected by:

1. British economy - credit crunch crisis and more visitors coming to the local area both 43%
2. Property improvements and the weather both 29%
3. Energy costs, improved website and rate of inflation all 14%

In contrast they were negatively affected by:

1. Weather 100%
2. Transport problems 29%
3. British economy, energy costs and new competitors in the area 14%

Service offered by Wealden's Economic Development and Tourism Team

Businesses were asked to describe the rating that they would award to the service received from the tourism team at Wealden District Council. The majority of services provided by the Economic Development and Tourism Team are regarded on average as neither satisfactory or dissatisfactory. Our Enjoy Sussex Visitor Guide 2008 and our Enjoy Sussex Website were given an average rating of fairly satisfactory.

- Tourism Update - 43% were fairly satisfied by this and a further 29% were neither satisfied or dissatisfied with the Tourism Update.
- Business Development Clinics 2008 - 80% of respondents were neither satisfied or dissatisfied or fairly satisfied with this service.
- Enjoy Sussex Visitor Guide 2008 - 50% said that they were fairly or very satisfied with the Guide, whilst 33% were very dissatisfied.
- Enjoy Sussex Website - 57% were fairly satisfied, whilst 29% were neither satisfied or dissatisfied.
- Business Help Website - 80% of respondents were neither satisfied or dissatisfied or fairly satisfied with this service.
- Enquiries made to the Team - the majority 60% felt that this was neither satisfactory or dissatisfactory.

Finally businesses were asked 'What would you like to see from Wealden's Economic Development & Tourism Team?'

- Training courses - 50% felt that training courses were fairly important part of the service offered by the Council.
- A source for business and marketing - 83% felt that this was fairly important service to be offered by the Council.
- Tourism networking events - 67% of respondents regarded these as either neither important nor unimportant and fairly important service.
- Championing my interests with Government and regulators – 60% thought that this was either fairly or very important for the Council to do this.
- Organising talks on industry matters – 33% of respondents felt this was fairly important, whilst 33% felt this was neither important or unimportant.