TSE RESEARCH

Isle of Wight Visitor Accommodation Audit 2017 Draft

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1 Introduction

In June 2017 Visit Isle of Wight commissioned Tourism South East to undertake a comprehensive audit of visitor accommodation on the Isle of Wight. It was intended to set a baseline of supply and quality to inform future tourism planning and measure the success of related interventions. Potentially, the data will also allow a more accurate 'bottom-up' estimate of staying visitor expenditure and economic value than has previously been possible.

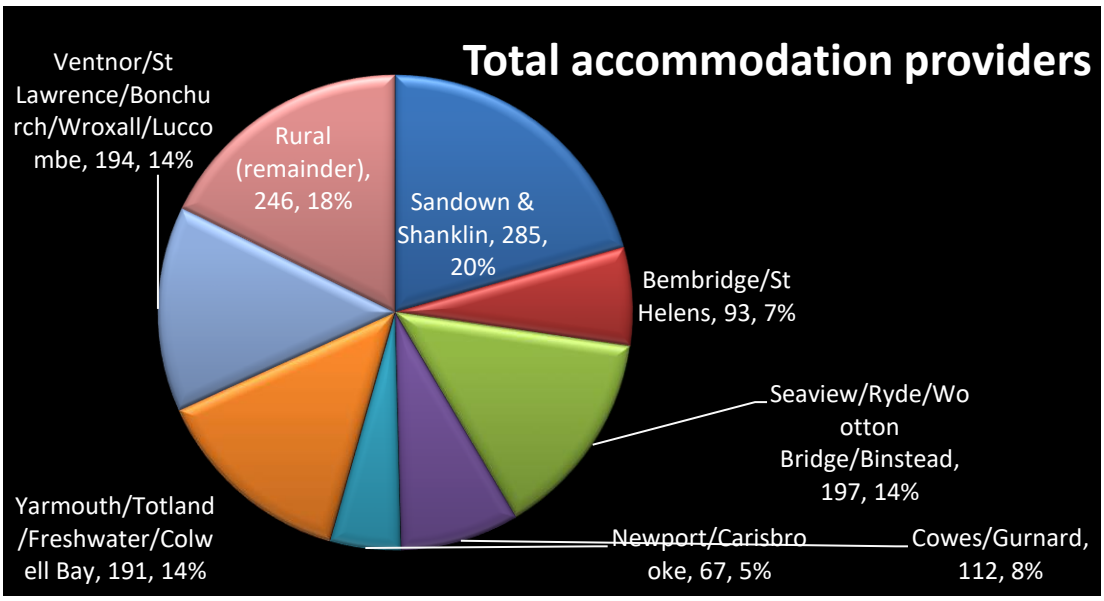
The ambition of the Audit was to record all accommodation business with a rateable value above £3,000 but also as many smaller operations, who comprise the vast majority, as possible. From the outset it was recognised that most micro businesses such as bed and breakfast suppliers and self catering in the form of cottages and single caravans, operate below this rateable value threshold. For many it's just a supplementary income, some opening only on an occasional basis (seasonally and for specific events) and usually relying on third party agencies for promotion. They tend to come and go relatively frequently so recording them all was always going to be a huge challenge with a diminishing return. Hence, whilst every reasonable effort was made to track micro providers, a proportion of stock will have been missed by the audit. We estimate the missing stock could add a further 5% or 10% to the overall bedspace capacity at peak times.

The data fields collected by the Audit were as follows:-

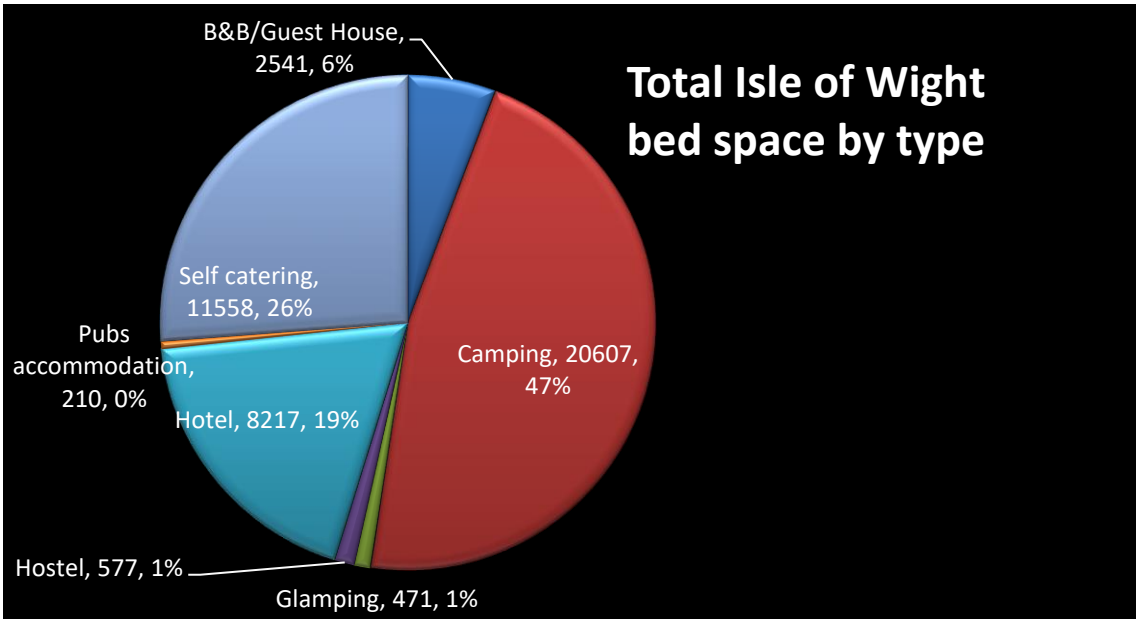
- Business name and nearest town.
- Postcode.
- Business capacity expressed in terms of bedrooms, units, or pitches depending on the type of accommodation.
- The number of bedspaces
- An indicator of quality where available in the form of an AA or VE/QIT accreditation.

2 The Headlines

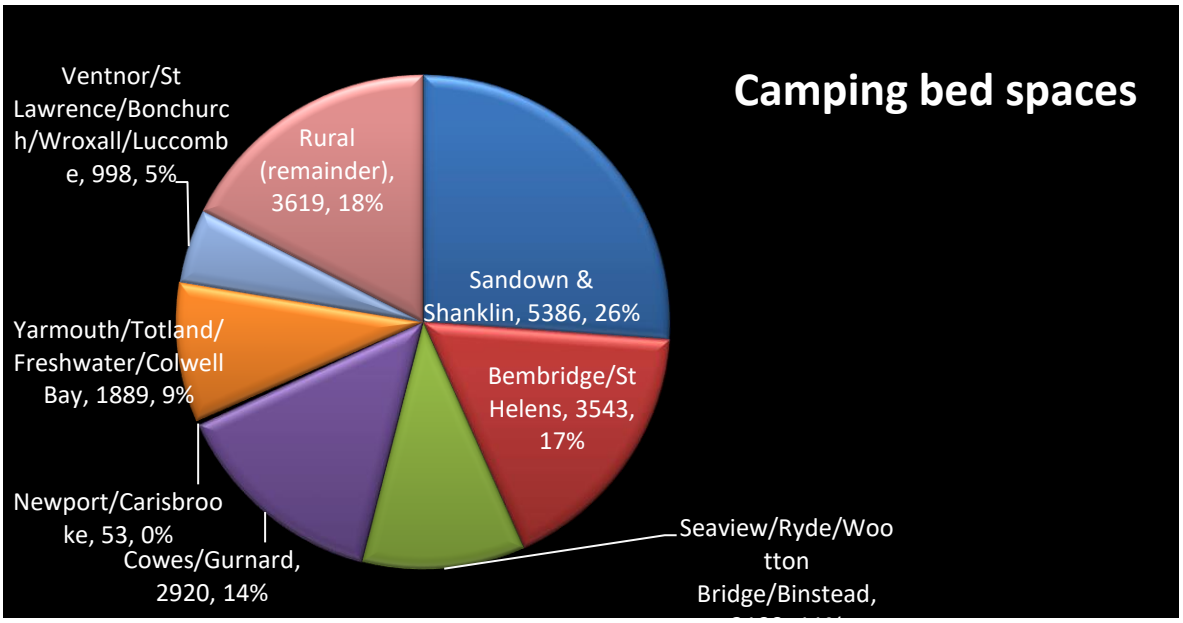
- 1,385 accommodation establishments were identified by the Audit. There are probably another 300/400 or so self catering apartments and cottages and 50/60 small B+Bs that the Audit missed, taking the overall number of establishments on the Isle of Wight to circa 1,800.



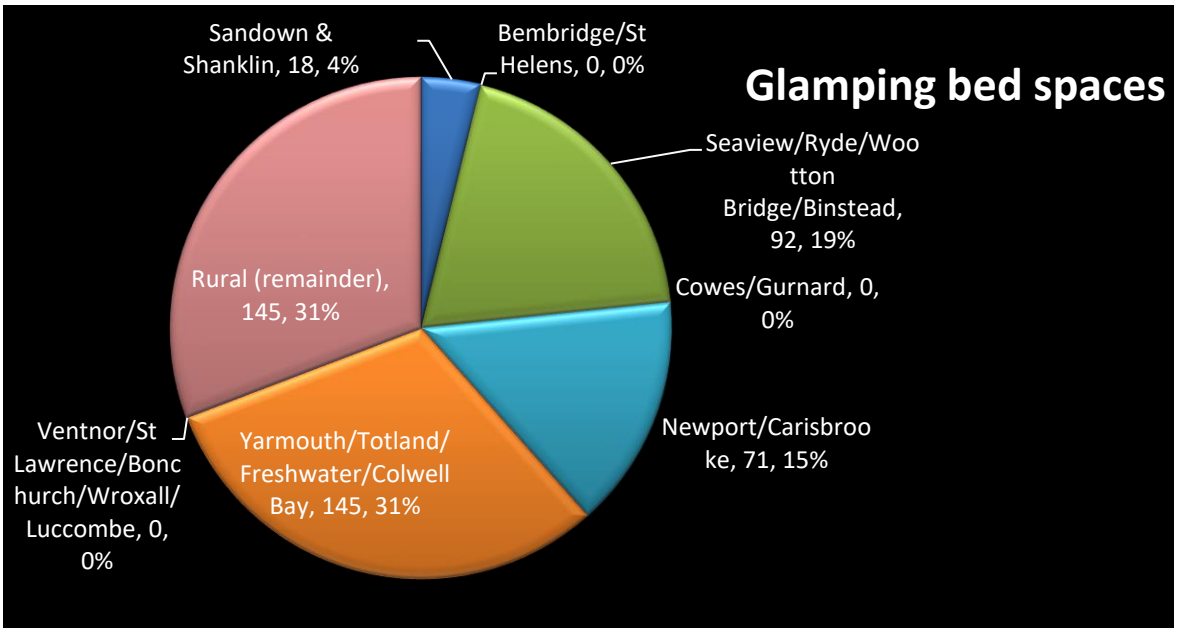
- The audited accommodation accounts for circa 44,000 bed spaces. Assuming an average occupancy across all sectors of 90% that the Island hosts around 39,600 staying visitors at peak times – or 43,500 if an assumption is made that the missing accommodation represents a further 10% of bed spaces.



- The Island's 64 caravan and camping sites accommodate the largest proportion of visitors with 20,607 bed spaces between them. The second most popular form of accommodation is self catering. The Audit identified 962 individual apartments and cottages. Even without the 300/400 estimated to be missing, this represents 11,558 bed spaces.

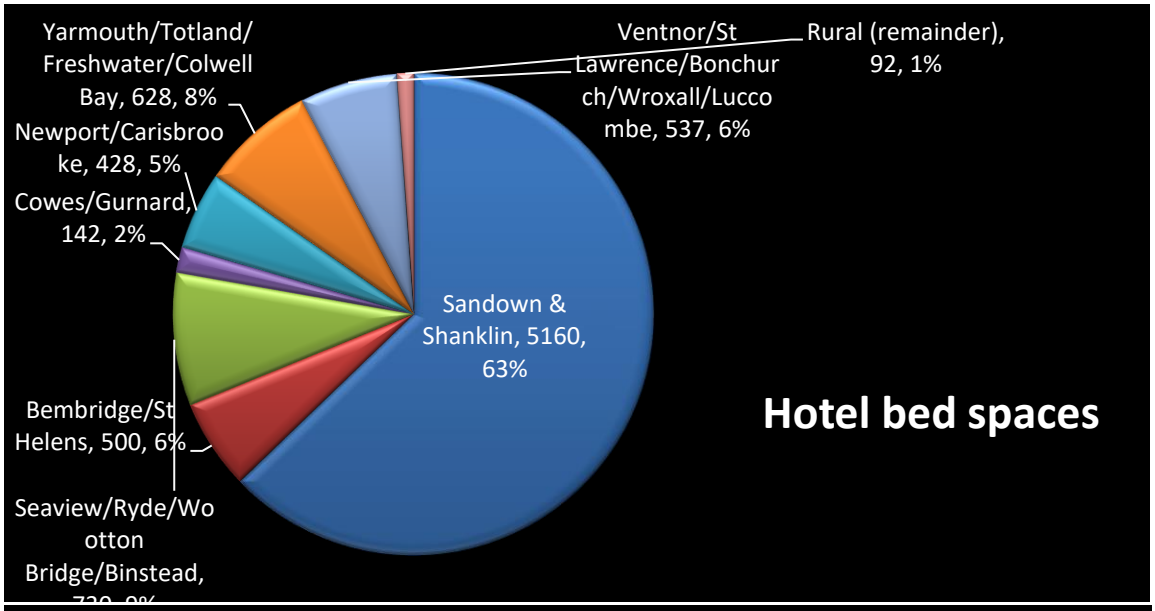


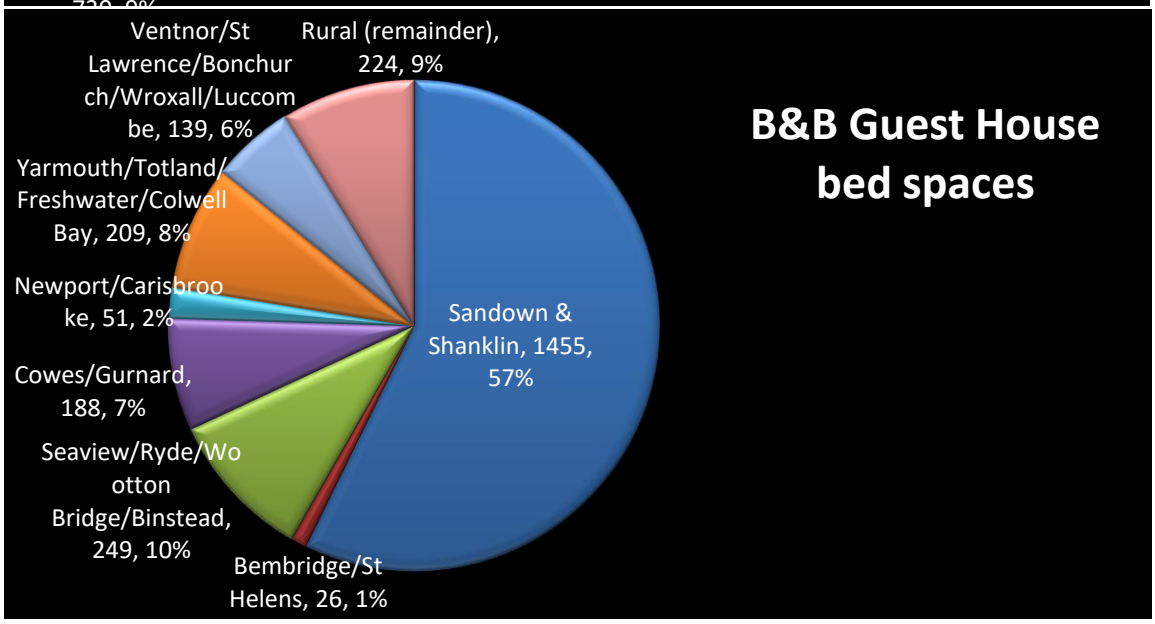
- Glamping is a growing sector nationally. The Audit identified 13 glamping sites on the Isle of Wight offering anything from safari tents, yurts and shepherd's huts to a Wessex helicopter.

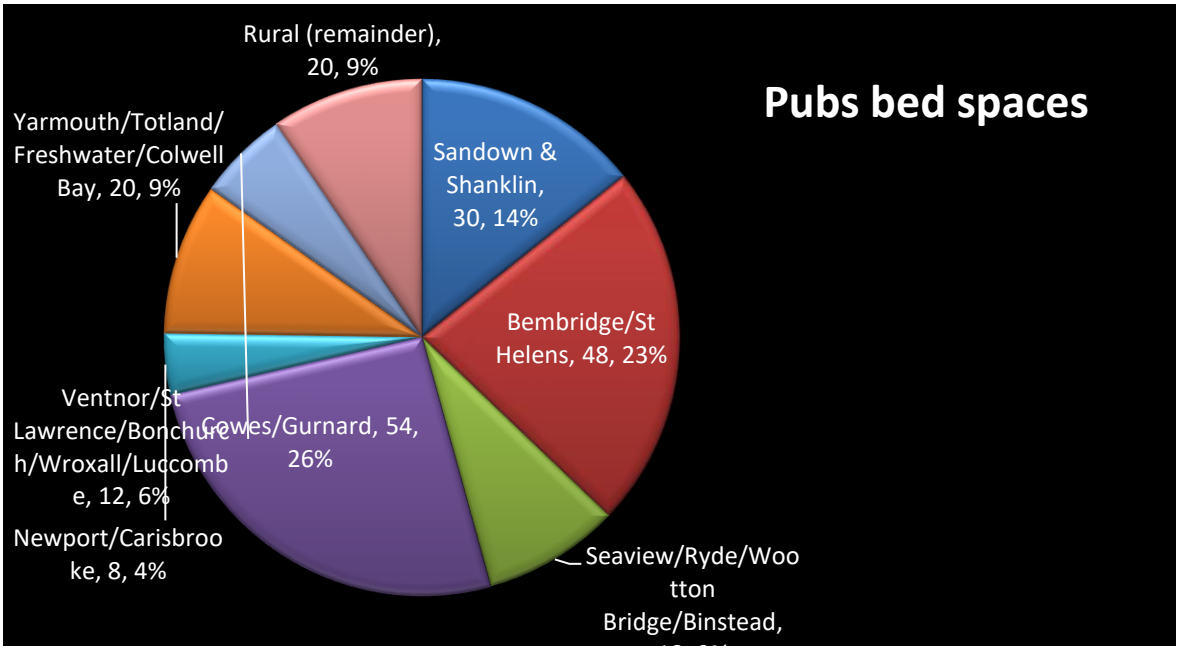


- 8,217 bedspaces are accounted for by the Island's 113 hotels and a further 2,751 by the 228 guest houses, B+Bs and pubs with accommodation. Between then they

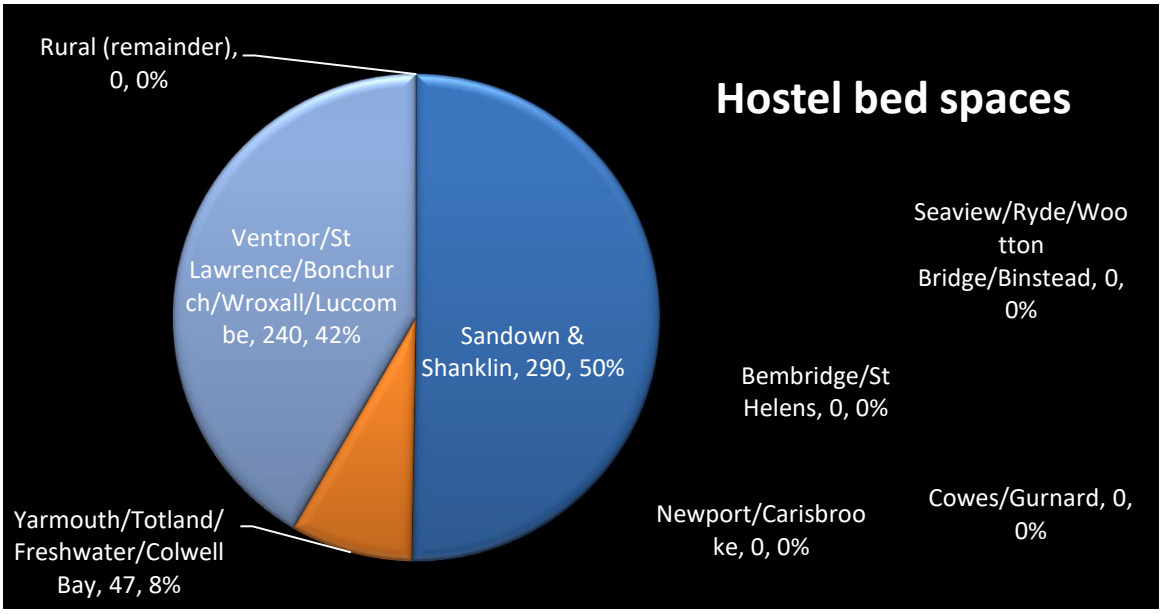
provide 10,968 bedspaces which, at peak times and assuming 90% occupancy, can accommodate 9,870 visitors.



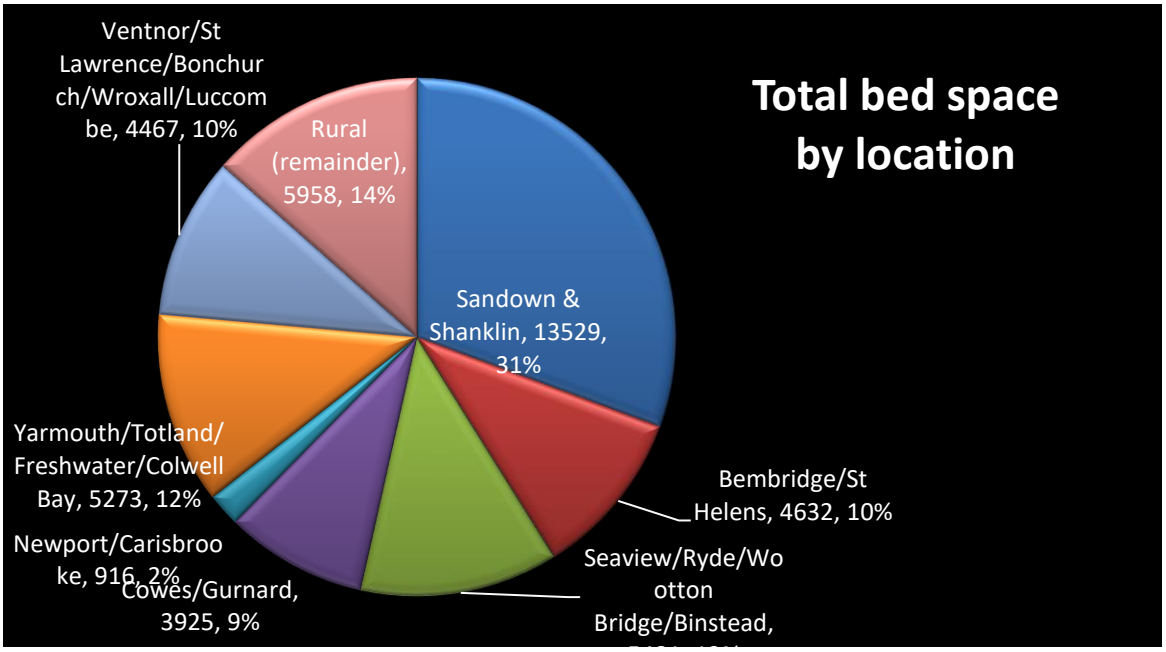


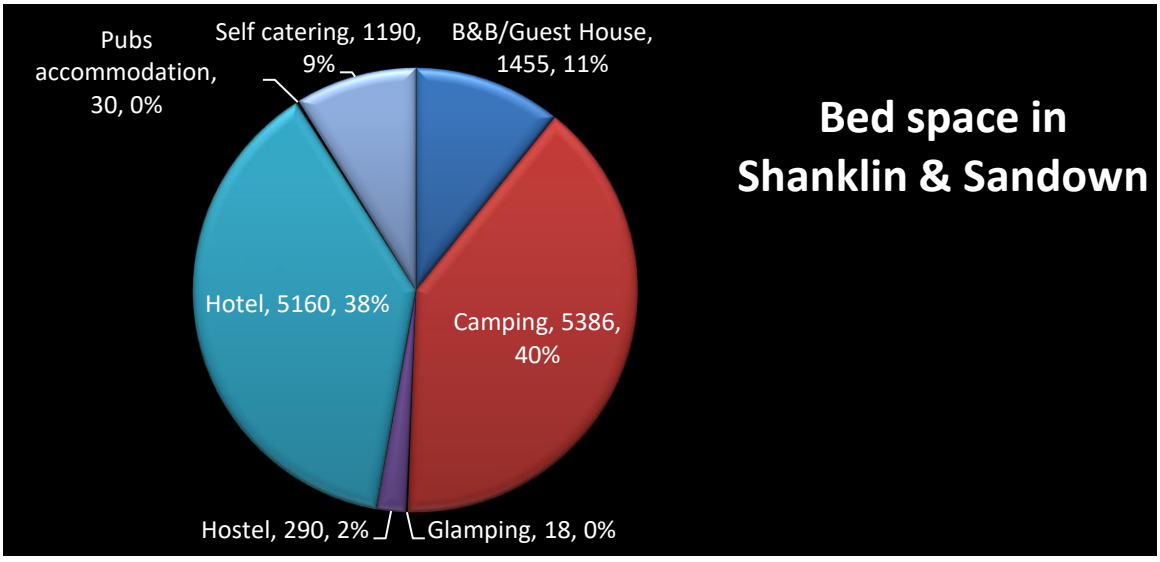


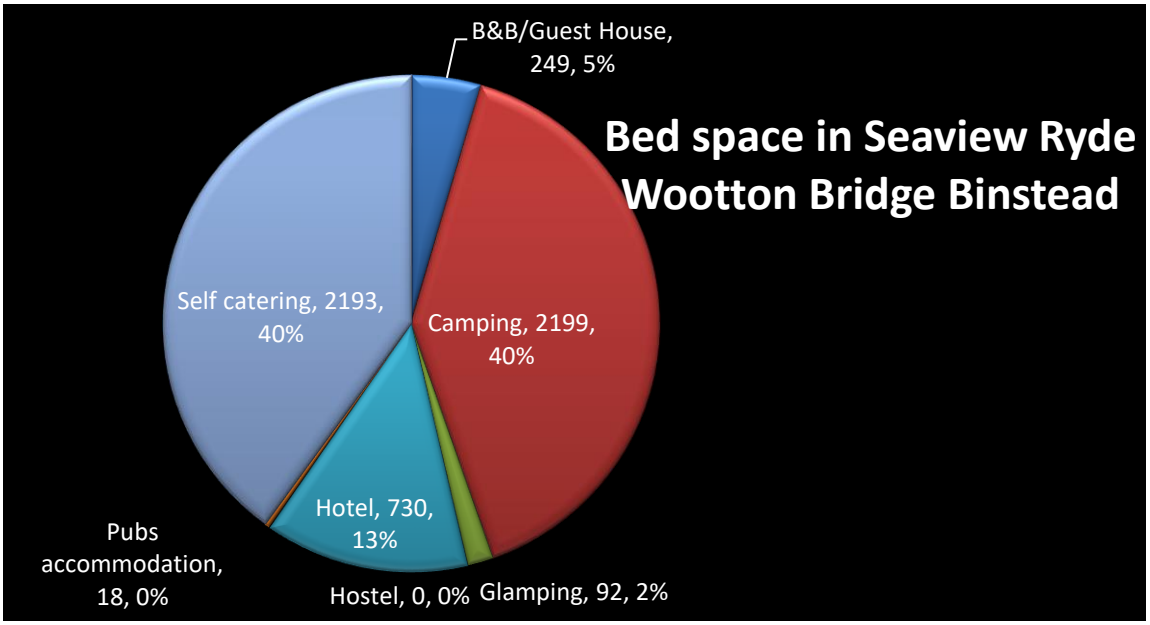
- The Island is also served by 5 hostels offering modestly priced group accommodation. They account for 577 bed spaces between them [Yet to find a bed space count for UK Sailing Academy, Cowes).

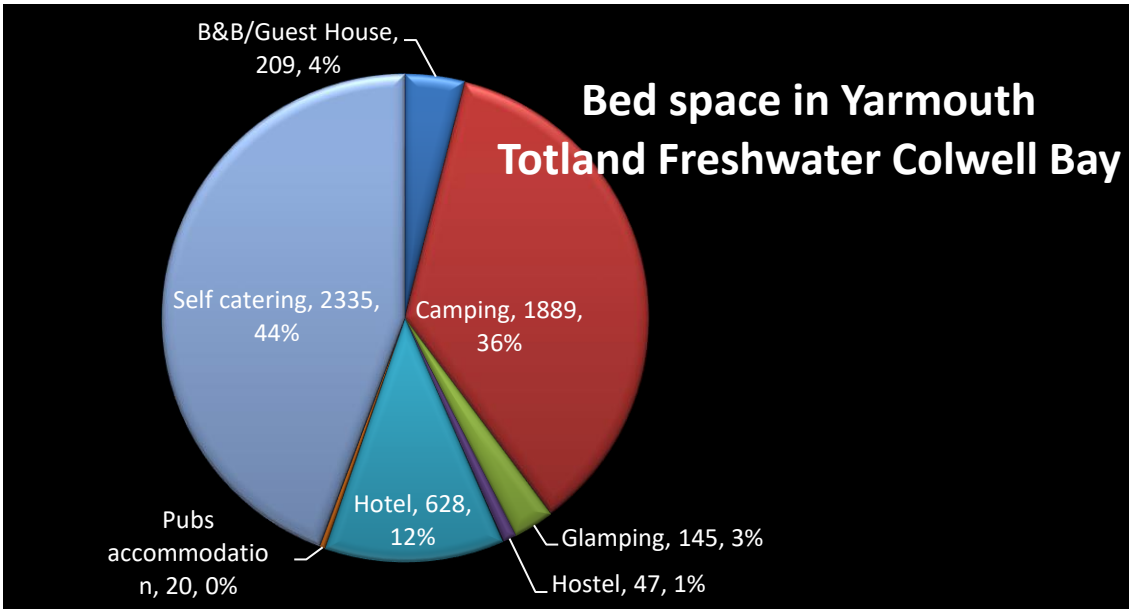


- 31% of all accommodation bedspaces are to be found in the Shanklin, Lake, Sandown conurbation. The second highest concentration is the stretch of coast covering Seaview, Ryde, Binstead and Wootton Bridge with 12% - marginally ahead of Yarmouth, Freshwater and the western peninsular.


Total bed space by location
Ventnor/St Lawrence/Bonchurch/Wroxall/Luccombe, 4467, 10%
Rural (remainder), 5958, 14%
Sandown & Shanklin, 13529, 31%
Bembridge/St Helens, 4632, 10%
Seaview/Ryde/Wootton Bridge/Binstead,
Cowes/Gurnard, 3925, 9%
Newport/Carisbrooke, 916, 2%
Yarmouth/Totland/Freshwater/Colwell Bay, 5273, 12%


Bed space in Shanklin & Sandown
Pubs accommodation, 30, 0%
Self catering, 1190, 9%
B&B/Guest House, 1455, 11%
Hotel, 5160, 38%
Camping, 5386, 40%
Hostel, 290, 2%
Glamping, 18, 0%


Bed space in Seaview Ryde Wootton Bridge Binstead
B&B/Guest House, 249, 5%
Camping, 2199, 40%
Glamping, 92, 2%
Hostel, 0, 0%
Hotel, 730, 13%
Pubs accommodation, 18, 0%
Self catering, 2193, 40%


Bed space in Yarmouth Totland Freshwater Colwell Bay
B&B/Guest House, 209, 4%
Camping, 1889, 36%
Glamping, 145, 3%
Hostel, 47, 1%
Hotel, 628, 12%
Pubs accommodatio n, 20, 0%
Self catering, 2335, 44%

- The Island's overall capacity to accommodate visitors compared to selected South Coast destinations as follows:

	Total bed space	Caravan & Camping	%	Self catering	%	Serviced	%	Hostel/ Group	%
Isle of Wight	44181	21078	47.71	11768	26.63	10758	24.35	577	1.3
Southampton	7693	0	0	293	3.83	6272	81.53	1128	14.66
Chichester	24103	19738	81.9	1287	5.34	3078	12.77	0	0
Brighton	7098	338	4.76	0	0	6672	94	88	1.24
New Forest	3779	655	17.33	29	0.77	3095	81.9	0	0

3 Methodology

1. Scoping existing databases

Existing databases provided a solid foundation for the Audit, in particular the BID Levy database, the 2009 TSE accommodation audit, the VE/QIT database and the Visit Isle of Wight DMS. Every record on each database was investigated and ratified to build a master list which was supplemented through online searches of third party websites and a site visit. This process exposed a number of issues/ considerations which are outlined in Section 4.

1.1 The BID Levy Database

The BID Levy Database was provided by Visit Isle of Wight for the purpose of the Audit. It covered all accommodation businesses above the £3,000 rateable value threshold and provided business name, address and contact details. In total there were details for 630 accommodation providers on the BID database, from large businesses to individual cottages and holiday apartments. All businesses were checked through on-line searches to confirm they are continuing to operate and to establish their capacity. In practice only a small proportion mentioned capacity in the form of rooms, bedspaces, units or pitches on their website so the search had to extend to third party sites such as OTAs and other agencies. In the course of investigation a range of anomalies with the BID database came to light including businesses which have closed, changed use or been renamed.

1.2 The TSE Accommodation Audit

The TSE Accommodation Audit was undertaken round 8 years ago with the help of SEEDA funding. Accommodation records were identified in the TSE Audit database that do not appear on the BID database. Each of these was investigated on line to check their existence and capacity, where it could be established that they are operating. Around 150 new records were added to the database by this means. A regular occurrence was contradictory capacity data between the TSE

Audit database and other on-line sources. In such cases the business's own website was taken as the most reliable source where the data was mentioned, followed by OTA/ agency websites.

1.3 The VE/QIT Database

The Visit England/Quality in Tourism Database contains data on accommodation accredited under the national quality assessment scheme including businesses where the accreditation has lapsed. As such it represents a small proportion of accommodation providers on the Island but it does include details of bedrooms/ units and pitches. The data on currently accredited operators is relatively up-to-date, but the investigation showed that the record of lapsed accommodation stock is very unreliable. Some businesses listed closed many years ago. Nevertheless it did reveal additional businesses for investigation/ inclusion in the Audit and was a useful secondary source of data on capacity for some businesses where the data could not be found elsewhere.

1.4 The VIOW DMS

The VIOW/ DMS database was used as an additional source of data on bedrooms/ units and pitches for featured accommodation businesses.

2. Telephone calls to fill gaps

In the event, the on-line investigation of existing databases produced around 95% of the data required for the businesses recorded – accepting that a proportion of micro businesses will be missing . The outstanding data issues were mainly concerned with whether or not a business was still in operation rather than its capacity. Often there was an on-line presence, even a dedicated website, but no recent reviews on OTA websites suggesting possible closure. Telephone calls to businesses using numbers listed on websites were used to fill information gaps. Contact was made in approximately 40% of cases and almost all had closed. The remainder were either unavailable numbers or failed to be answered on the two occasions they were called. The assumption was made that these had also closed although 15 businesses were sufficiently significant to require confirmation from on a site visit.

At a time of the Audit businesses were likely to be sensitive to new business rates and the BID levy so careful messaging about room numbers etc was required. In practice, because almost all had closed, questions about capacity became unnecessary and were not an issue.

3. Web search to identify additional stock

There are probably 50 or more third party websites of one kind or another listing accommodation on the Island. They can be a good source of leads for accommodation providers that don't appear on any of the existing databases i.e. bed and breakfasts, individual self catering units (cottages/ chalets/ bungalows etc) and certificated camping sites. Some of these business registers and agencies list over 300 properties often without capacity or postcode data. Investigating all would have been onerous and beyond the budget, with a diminishing rate of return. Hence, the search was limited to some of the more prominent national agencies/ websites and dedicated Isle of Wight agencies.

4. Site visits to confirm closures/ new stock

There were 15 case where the web search and telephone/email follow up wasn't been able to establish categorically whether a business is still in operation and it was of a sufficient size to warrant a site visit. This took place on the 2 August. In practice the visit established that 8 businesses were closed, and 7 were still operating although 3 had changed names. The opportunity was also taken in Sandown, Shanklin to spend time looking for guest houses and bed and breakfast businesses that might have been missed in areas where holiday accommodation is highly concentrated. In practice this revealed a further 26 Guest Houses/ B+Bs and Holiday Apartments for inclusion in the Audit.

5. Preparation of new database

All of the information collected has been presented in the form of an accommodation database with fields capable of re-ordering by:-

- Business name
- Business type/sector
  - Hotels
  - Guest Houses/ B+Bs
  - Group accommodation
  - Glamping sites
  - Camping and caravan sites/ holiday parks
  - Self catering (cottages/ bungalows/ flats)
- Nearest town
- Postcode
- Number of bedrooms, units and pitches
- Bed spaces (where data is absent, to a ratio of bed spaces to bedrooms, units and pitches)
- VE/AA quality indicator where it exists

4 Key Consideration/ Assumptions/ Limiting Factors

1. Comprehensiveness

Every effort has been made to identify and investigate all accommodation businesses above the £3,000 business rates threshold and we are confident close to 100% are listed. Below this threshold, the vast majority of accommodation is B+B and self catering in the form of individual houses, flats and holiday caravans. Many do not have a dedicated website relying instead on third

party websites/ OTAs of which there are well over 100 featuring Isle of Wight accommodation. In the timeframe and budget it wasn't possible to check all of these against the database – particularly the numerous national and local self catering agencies which between them probably list over 1,000 properties. We estimate that our investigation has identified 80% of B+Bs and 60% - 70% of self catering provision. It is interesting to note that there are circa 250 Isle of Wight providers relying on AirBnB for their promotion. Of these, all but 10 are houses and flats.

2. Accuracy

The degree to which the required information was mentioned within a provider's website varied between sectors. There were particular challenges when it came to the caravan and camping/ holiday park sector. This sector offers caravans/ chalets for sale and holiday rental. Those in private ownership can be used for holidays a couple of weeks a year, occupied effectively on a residential basis, proactively let for holidays by the owner or let fully for holidays where the site owner acts as an agent. The nature and split of tenures was not always clear from the information on-line and in some cases a view had to be taken on the extent to which privately owned units appeared to be available for holiday lets.

Different accounts of capacity data appeared on different databases and websites. In some cases even the operator's own website gave alternative data on the number of bedrooms on offer. Some OTA websites give capacity information but on occasions this proved to be inaccurate. The Audit drew on as many sources of data as possible to establish capacity but it is not possible to guarantee complete accuracy. Where there were conflicts in capacity data the providers website has been taken as the definitive source – where given.

Rooms, units and pitches were more likely to be mentioned by websites than bedspaces – i.e. the maximum number of people that can be accommodated. The exception tended to be self catering units and B+Bs where size matters to potential customers. Larger serviced accommodation businesses offering a wide range of bedroom size options did not tend to specify the overall number of bedspaces. Similarly holiday caravan and camping site providers, with such an extensive range of static units and pitches that can accommodate any size of tent, touring caravan or motorhome made no reference to bedspace capacity. Where bedspaces were mentioned on websites they were recorded. Otherwise assumptions were made as follows;

- Serviced accommodation – 1 bedroom = 2 bedspaces
- Caravan and camping – 1 unit/ pitch = 3.5 bedspaces

A web presence on third party websites and even a dedicated website proved on a number of occasions to be insufficient evidence of operation in 2017. A number of checks were made to establish definitively whether a business was still in operation. Recent Trip Adviser reviews were the best indicator. In their absence accommodation providers were telephoned but not all calls were answered. Larger businesses were visited during the site visit but in a small number of cases a judgement was made about whether they remained in operation based on the weight of evidence.

Another issue encountered was a change of business name, often after a changed in ownership. This had the potential to lead to duplicate records. Cross checks by postcode were used to identify these wherever possible.

For the reasons above, whilst every effort has been made to double check the details of all establishments within the Audit, it isn't possible to guarantee the accuracy of 100% of the records.

5 Visitor Accommodation Stock and Capacity by Sector and Location

	Total accommodation providers	Total bed space	B&B/ Guest House	Camping	Glamping	Hostel	Hotel	Pubs accommodation	Self catering
Sandown & Shanklin	285	13529	1455	5386	18	290	5160	30	1190
Bembridge/St Helens	93	4632	26	3543	0	0	500	48	515
Seaview/Ryde/Wootton Bridge/Binstead	197	5481	249	2199	92	0	730	18	2193
Cowes/Gurnard	112	3925	188	2920	0	0	142	54	621
Newport/Carisbrooke	67	916	51	53	71	0	428	8	305
Yarmouth/Totland/Freshwater/Colwell Bay	191	5273	209	1889	145	47	628	20	2335
Ventnor/St Lawrence/Bonchurch/Wroxall/Luccombe	194	4467	139	998	0	240	537	12	2541
Rural (remainder)	246	5958	224	3619	145	0	92	20	1858
Isle of Wight	1385	44181	2541	20607	471	577	8217	210	11558

6 Appendices

Appendix 1: Accommodation Stock Spreadsheet

Appendix 2: Map representation

Click to view Google map