



**Lewes Accommodation Audit 2019**



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1 Introduction

### In November 2018 Lewes District Council commissioned Tourism South East to undertake a comprehensive audit of visitor accommodation in the District. 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 types and to be as comprehensive as possible given the budget. However, from the outset it was recognised that many micro businesses such as bed and breakfast suppliers and self-catering in the form of cottages and single caravans, operate below the business rates radar. 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 challenge with a diminishing return. Hence, whilst every reasonable effort was made to track micro providers, a small proportion of stock will have been missed by the audit. Further explanation of the audit’s limitations and assumptions in relation to the data are provided later in this report.

2 The Headlines

### 219 accommodation establishments were identified by the Audit of which around 53% comprise one or more self-catering units such as cottages, lodges and apartments. We estimate there are probably another 50 or so self-catering units and a small number of B&Bs that the Audit missed, (which are not included in the total figures) taking the overall number of establishments in Lewes to around 270.

### In addition there are around 290 owners listed as active on AirBnB and other shared economy sites in Lewes District mainly offering rooms in houses and apartments (rather than B&Bs). There is probably a 10% overlap with property owners using AirBnB as well as standard self-catering agencies but they still account for a significant number of seasonal bed spaces – we estimate circa 1,000. Although the Audit did not record the details of AirBnB properties, totals are included in the overall estimate of bed spaces in Appendix 1.

### The audited accommodation accounts for 5,738 bed spaces. Assuming bed space occupancy across all sectors of 90%, this accommodation, along with AirBnB properties, hosts over 6,000 staying visitors at peak times.

### Lewes’s caravan and camping sites accommodate by far the largest proportion of visitors with 3,638 bed spaces between them. Adding glamping sites, which also offer touring pitches, the total number of bedspaces comes to 4,023.

### The second most popular form of accommodation (excluding AirBnB) is self-catering. The Audit identified 143 individual apartments and cottages representing 576 bed spaces.

### 573 bed spaces are accounted for by Lewes’s 7 hotels. Guesthouses, B&Bs and inns account for a further 478 bed spaces. Together on a peak day serviced accommodation, assuming 90% bedspace occupancy, can accommodate around 950 visitors.

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### **3 Methodology**

## Scoping existing databases

### Existing databases provided a solid foundation for the Audit, in particular the Council’s business rates database, the 2009 TSE accommodation audit and the VE/QIT database. Every record on each database was investigated and ratified to build a master list which was supplemented through online searches of third party websites. Where no online presence could be found, in many cases, there was notice of closure on the relevant website. An analysis of postcodes assisted in identifying name changes.

## 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 . Telephone calls to businesses using numbers listed on websites were used to fill some information gaps.

## Web search to identify additional stock

### There are probably 30 or more third party websites of one kind or another listing accommodation in Wealden. They can be a good source of leads for accommodation providers that don’t appear on any of the existing databases i.e. B&Bs, individual self-catering units (cottages/ chalets/ bungalows etc) and certificated camping sites. Most of these business registers and agencies list properties without capacity or postcode data – or in the case of AirBnB, without name or address. Investigating all would have been onerous and well beyond the budget, with a diminishing rate of return. Hence, the search was limited to a range of the more prominent national agencies/ websites and dedicated Wealden area agencies.

### **Preparation of new database**

### All of the information collected has been presented in the form of an accommodation database with the following fields:-

### Business name

### Business type/sector

### Hotels

### Guest Houses/ B&Bs

### Inns

### 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)

4 Key Consideration/ Assumptions/ Limiting Factors

### **Comprehensiveness**

### Every effort has been made to identify and investigate all accommodation businesses above the business rates threshold and we are confident close to 95%+ 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 over 50. 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 300 properties. We estimate that our investigation has identified at least 95% of B&Bs and 80% of self-catering provision. It is interesting to note that there are circa 370 Wealden providers relying on AirBnB for their promotion. Of these, the majority are houses and flats. It has not been possible to investigate accommodation listed on the shared economy websites such as AirBnB although some of it overlaps with other commercial agencies sites.

### **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. For the purposes of the Audit we have included privately owned holiday caravans on the basis that they will be used and sublet over the peak period.

### 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 bed spaces – 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 bed spaces. 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 bed space capacity. Where bed spaces were mentioned on websites they were recorded. Otherwise assumptions were made as follows;

* Serviced accommodation – 1 bedroom = 2 bed spaces
* Caravan and camping – 1 pitch = 3 bed spaces, 1 unit = 4 bed spaces
* AirBnB – 1 unit = 5 bed spaces (average for Sussex)

### 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 2018. A number of checks were made to establish definitively whether a business was still in operation. Recent Trip Adviser reviews were a good indicator. In their absence accommodation providers were telephoned but not all calls were answered

### 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 by Location

By collecting postcode data it has been possible to map each type of accommodation and show where concentrations exist – click below

Self Catering: <https://drive.google.com/open?id=1kWHR7WU6rZNw10lp1Mg00Vx1xXVFbBxZ&usp=sharing>

Inns:

 <https://drive.google.com/open?id=1QABOj-fMK4K_2WFDSUE4XX5ixxxxsaPT&usp=sharing>

Hotels:

 <https://drive.google.com/open?id=15LyJbm1LW--ULGc329xbhATFoBD51f_d&usp=sharing>

Guesthouses/B&B:

<https://drive.google.com/open?id=10TF6kd8yq_3PF9ex1d783S5qKPrZMMui&usp=sharing>

Group/Hostels: <https://drive.google.com/open?id=1V3VDd2vb8Vmq1gIomqLOTLDl30m6mbko&usp=sharing>

Glamping:

 <https://drive.google.com/open?id=1ksfu9n4cyALvXIH--lrDY2f15GA5mebv&usp=sharing>

Camping and Caravan: <https://drive.google.com/open?id=1jIKKHxABjYc1FxX0Z1OCnu8BOcbpn2iS&usp=sharing>

6 Appendices

Appendix 1: Accommodation Stock Table

Appendix 2: Accommodation Stock Spreadsheet

Appendix 1

|  |  |  |  |
| --- | --- | --- | --- |
| Category | Establishments | Rooms/pitches/units | Bedspaces |
| Hotels/Motels |  7 |  288 |  573 |
| Guest Houses/B&B |  59  |  186 |  371  |
| Inns |  8  |  52 |  107  |
| Self-Catering |  116  |  143 |  576 |
| Glamping |  6  |  111  |  385  |
| Group/ Hostel |  2  |  25 |  88 |
| Caravan and Camping/Holiday Centre (inc Scouts) |  21  |  1,044 |  3,638 |
| Total Audited Stock |  219  |  1,849 |  5,738  |
| AirBnB estimate |  290 |  290  |  1,160  |
| Total with AirBnB |  509 |  2,139 |  6,898 |