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South East Accommodation Audit 2008

Tourism South East Research Service

INVESTOR IN PEOPLE

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1 Executive Summary

In 2006 with the support of funding from SEERA and SEEDA, Tourism South East embarked on a comprehensive audit of all known commercial accommodation stock in the region. The principal aim of the audit was to provide a baseline of information on the number of businesses and bedspaces available as well as the proportion of graded accommodation stock in the South East.

Stock data was drawn from a number of sources including VisitBritain, TRIPs (Tourism Resource Information Processing System), individual local authority databases, yellow pages, Thompsons Business Directory, Internet searches and tourism brochures and guides. The review of the information drawn from the data sets provided us with a rather mixed and unclear picture of commercial stock in the region. Many of the data sets contradicted others or contained glaring omissions. Over the period July 2007 up to March 2008 we made concerted efforts to refine the information in order to provide an audit which would be as accurate as realistically possible. This report presents the results of the 2008 audit.

Overall summary

- A total of 9,296 accommodation businesses were identified through this year's audit.
- These businesses accounted for an estimated 159,790 rooms or pitches and offering in the region of 447,071 bedspaces.
- The serviced accommodation sector was by far the largest in terms of number of businesses (65.2%).
- The caravan and camping sector represented around half of all available bedspaces (51.4%).
- Around two-fifths (41.5%) of the South East's accommodation stock was quality assessed.
- The bulk of quality assessed businesses were either classified as 4 star (47.7%) or classified as 3 star (35.2%).
- A total of 6,064 serviced accommodation businesses were identified, accounting for 87,192 rooms and offering in the region of 179,154 bedspaces.
- Thirty-five percent of the South East's serviced accommodation stock was quality assessed.
- A total of 2,649 self catering businesses (including agencies) were identified, accounting for 10,520 bedrooms and 21,415 bedspaces.
- Over half of the region's self catering accommodation stock was quality assessed (59%).
- A total of 488 caravan and camping businesses are known to be operating in the South East, representing an estimated 49,868 pitches and 229,685 bedspaces.
- Over a third (35.5%) of the South East's caravan and camping stock was quality assured.
- A total of 95 group accommodation establishments operate in the South East, representing 12,210 rooms and 16,817 bedspaces.
- Just under a third of the South East's group accommodation stock was quality assured.

Disability access

- 681 accommodation businesses in the South East have access for people with disabilities (7% of total accommodation stock).
- These businesses accounted for 43,738 bedrooms and pitches and 118,510 bedspaces.

- Seven percent of these 681 businesses were part of the NAS.
- A fifth (20.9%) had been approved by Radar and 54 businesses (8%) had been recommended by Local Authorities on their website.
- 449 other accommodation businesses were found that had disabled access of some kind.
- Seventy-five percent of Radar Approved businesses were located in the serviced sector.
- Nine different Local Authorities recommended accessible serviced accommodation.
- 40% of all accommodation businesses that are part of NAS were located in serviced sector another 40% were found in self catering and 20% were located in caravan and camping sector.
- Over 53% of accessible accommodation was quality assessed.
- Serviced accommodation had 535 accessible accommodation businesses (78.6% of the total accessible stock).
- A total of 89 businesses in the self catering sector were known to have access for people with disabilities.
- 51 caravan and camping businesses were known to be accessible.
- Only 6 group accommodation businesses were known to be accessible.

Regional summary

- Hampshire (19.0%), Kent (17.5%), East Sussex (14.5%) and IOW (14.1%) shared the largest proportion of the region's total accommodation stock.
- Buckinghamshire (4.7%), Berkshire (5.2%), and Surrey (6.3%) had smaller proportions of accommodation.
- The IOW (53%) had the highest proportion of quality assured stock (as a proportion of all available stock in that area).
- Berkshire (32.0%) and Surrey (32.1%) had fewer quality assured businesses.
- Quality assured stock accounted for between 36 – 46% of the remaining sub-regions' accommodation stock.
- With the exception of the IOW, serviced accommodation was the most predominant type of accommodation in all sub-regions.

- Kent (19.5%), Hampshire (14.5%), East Sussex (13.7%) and West Sussex (12.6%) shared the largest proportion of the South East's accessible accommodation stock.
- Buckinghamshire (6.5%), Berkshire (6.6%) and Oxfordshire (8.2%) had the smallest amount of the region's accessible accommodation stock.
- Just under two-fifths of businesses which are part of NAS were found in Kent
- Hampshire had the largest proportion of accommodation that had been approved by Radar.
- Only four regions had Local Authorities that recommended accessible accommodation.
- Serviced accommodation was the most predominant type of accessible accommodation in each region

2 South East Accommodation Audit

2.1 Introduction

An accurate audit of the region's commercial accommodation supply is critical in providing the evidential base for estimating the benefits of tourism to the economy of the South East. Such monitoring is also vital in supporting all organisations involved in tourism to make informed policy decisions and to plan investments in infrastructure.

The importance attached to gathering and monitoring commercial accommodation stock has become even greater following the successful bid to host the 2012 Olympics in London. To maximise the tourism potential of the Olympics for the region, the importance of having in place appropriate infrastructure - adequate accommodation and transport - air, road and rail, restaurants, retail outlets and entertainment venues cannot be overstated. This audit goes some way in meeting this information need.

Despite the obvious importance of having a comprehensive and up-to-date accommodation audit which can be used by tourism and government organisations, such an audit does not exist for the region. Indeed it is recognised at the national level that tourism development is often hindered by a 'data deficit' indicated by partial and often unreliable data on tourism supply and demand.

To remedy this problem in our region, funding was obtained from SEEDA and SEERA to conduct a comprehensive audit of all known accommodation stock in the South East. It began by gathering data from a number of existing sources. These included TRIPs (Tourism Resource Information Processing System), accommodation databases held by VisitBritain and local authorities, searches through Yellow Pages, Thompsons Directory, the Internet, and brochures and guides. Postcode data was also collected to be used for GIS mapping purposes and cluster analysis.

Once we scrutinized the data emanating from our various sources we found it contained several gaps, anomalies and /or failure to record changes in ownership and closures. That said we should highlight here that several local authorities across the region provided us with very comprehensive and up-to-date databases.

In our initial reporting of the results to SEEDA and SEERA in July 2007 we acknowledged that a considerable amount of additional work would be needed to refine the results. Over the course July 2007 to March 2008 additional funding was made available to enable us to engage in a number of additional tasks to help us improve the level of accuracy. These included cross-referencing local authority accommodation databases with local authority VAT registration lists and writing to businesses whose status was unclear. Where no written response was provided, follow-up telephone calls were made.

This report presents the accumulation of hard work gone into producing a thorough and meticulous review of commercial accommodation stock in the region. Whilst we have endeavoured to ensure that the audit is as comprehensive as possible, 100% coverage is not achievable due to the lack of registration and transient nature of some accommodation businesses.

2.2 Objectives

The principal objective of this audit is to establish a baseline of the number of businesses and bedspaces available as well as the proportion of graded accommodation stock in the South East. This will provide the basis for future monitoring of trends in supply and quality grading, and allows TSE to produce:

- A comprehensive database of known accommodation stock by local authority district, borough and unitary authority;
- A baseline estimate of total businesses, rooms and pitches and bedspaces by local authority district, borough and unitary authority;
- A baseline estimate of the number of establishments that are quality assessed, by local authority district, borough and unitary authority;
- Spatial maps of accommodation stock supply using postcode data;
- A comprehensive database of accommodation with access for people with disabilities.
- Baseline data on accommodation stock to inform regional spatial planning and monitoring programmes.

2.3 Methodology

The audit began in 2006 as a desk-top exercise drawing on data from a number of established sources; including TRIPS (Tourism Resource Information Processing System), databases held by VisitBritain, searches through Yellow Pages, Thomson's Directory, Caravan and Camping Club Guide, Good Pub Guide, the Internet, and referencing these with local authority accommodation databases.

Businesses that could not be verified by these data sources were highlighted and letters were sent or telephone contact was made to establish whether they were still trading as accommodation and to confirm details of ownership, bedrooms or pitches, number of bedspaces and quality grading. If it was not possible to make contact at all, these businesses were then flagged as 'unknown'. *Tables in Appendices 2 – 4 detail the number of 'unknown' businesses in each sub-region and district.*

Estimates of the number of rooms or pitches and bedspaces were made where this data was not available through the sources or from follow up telephone calls or letters. *The basis for these calculations is given in Appendix 1. Tables in Appendices 2 – 4 detail the number of businesses where estimates have been made within each sub-region and district.*

A breakdown of the components of the audit is as follows:

Accommodation	Outputs
Businesses covered by the audit include: **Serviced Accommodation:** Hotels, B&Bs, guest accommodation and pubs with accommodation **Non Serviced Accommodation:** Self catering, touring caravans, tents, static caravans and holiday centres. **Other:** Group accommodation, University/campus	• Ownership details and full postal address. • No. of bedrooms or pitches • No. of bedspaces • Quality • No. of accommodation businesses with disabled access of some kind including number of bedrooms or pitches and bedspaces. • No. of businesses involved in disability schemes or recommendations.

2.4 Definitions

The TRIPS database classified accommodation into the following sectors which have been used as the basis for this audit:

Serviced accommodation: B&Bs, farm B&Bs, guest houses, hotels, country house hotels, motels or budget hotels, townhouse hotels, castles, restaurants with rooms and inns or pubs. Some university accommodation that offered serviced rooms was also included in this category rather than the group accommodation category. Similarly, serviced apartments[1] were also included in this category.

Self catering accommodation: Cottages, flats, apartments, houses, chalets, bungalows, moored houseboats.

Caravan & Camping: Touring caravans, motor homes, tents, static caravans for hire, owned static caravans, chalets and timber lodges. Holiday Centres were also included in this category.

Group: YHA hostels, other hostels for visitors, camping barns, university or campus accommodation (that is not let as serviced accommodation), accommodation used for schools, scout and other groups.

Bedroom: A room used primarily for sleeping. The term does not account for the number of people that can sleep in the room.

Bedspace: One bedspace is equivalent to one person.

[1] Serviced apartments should be considered as a separate category as many are often available for long term let for business workers or people relocating to an area.

Pitch: An area of ground used for caravans and camping. One pitch holds one caravan or one tent.

NAS: National Accessible Scheme. A nationally recognised rating to ensure accommodation meets the needs of people with physical and sensory needs.

RADAR: The Royal Association for Disability and Rehabilitation. It is the UK's largest disability campaigning network.

3 South East Accommodation Stock Analysis

3.1 Accommodation supply across the South East

3.1.1 Total stock

A total of 9,296 accommodation businesses have been identified through this audit[2]. These businesses accounted for an estimated 159,790 rooms or pitches and offered approximately 447,071 bedspaces.

Table 1: South East all accommodation stock

South East Total	
No. Businesses	9,296
No. Bedrooms or pitches	159,790
No. Bedspaces	447,071
No. Quality Assured	3,855
	41.5%
No. Ungraded	5,442
	58.5%

(Further detailed tables are given in appendix 2-4.)

3.1.2 Accommodation type

The serviced accommodation sector was by far the largest sector in terms of the number of businesses (65.2% of all accommodation establishments). Just under a third of all commercial accommodation stock was found to consist of self-catering houses, cottages and flats.

The audit identified a total of 488 caravan and camping parks/sites across the region and 95 businesses classified under 'group' accommodation.

Table 2: Stock split by type

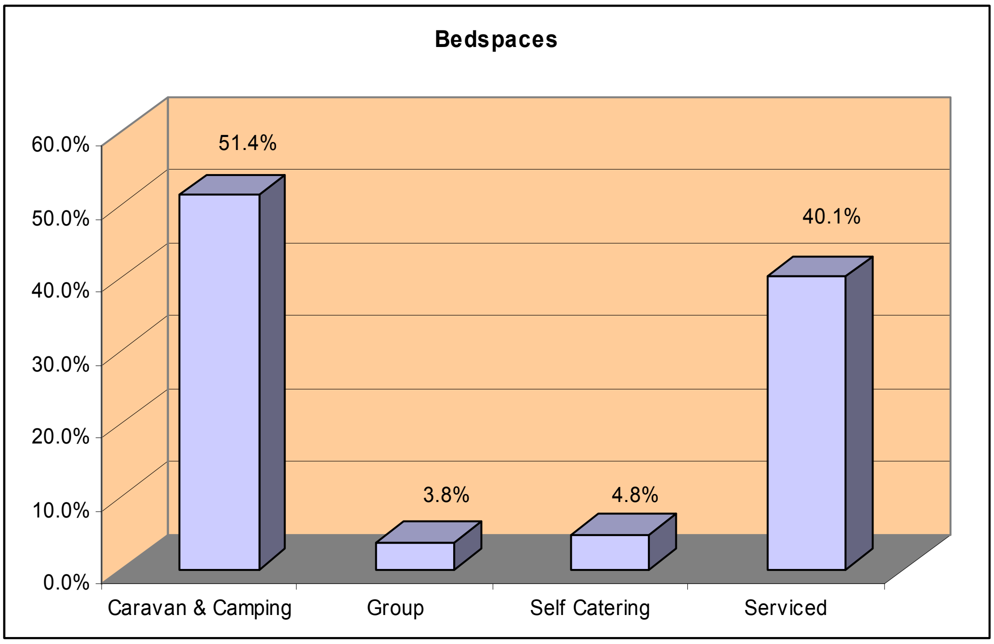
Serviced	6064	65.2%
Self Catering	2649	28.5%
Caravan and Camping	488	5.2%
Group	95	1.0%
South East Total	9296	100%

[2] 99.4% (9,559 businesses) of these were known to be currently trading (as at 31st March 2008) and a further 0.6% (58 businesses) were listed, but due to TSE not being able to establish contact it was unclear whether they were trading at this time.

3.1.3 Visitor capacity

Despite the caravan and camping sector representing only 5% of total stock around half of all bedspaces (51.4%) were found in this sector, followed by the serviced sector (40.1% of all available bedspaces). The self catering sector represented only 4.8% of total bedspaces in the south east region and group accommodation only 3.8%.

Figure 1: Distribution of bedspaces by accommodation sector



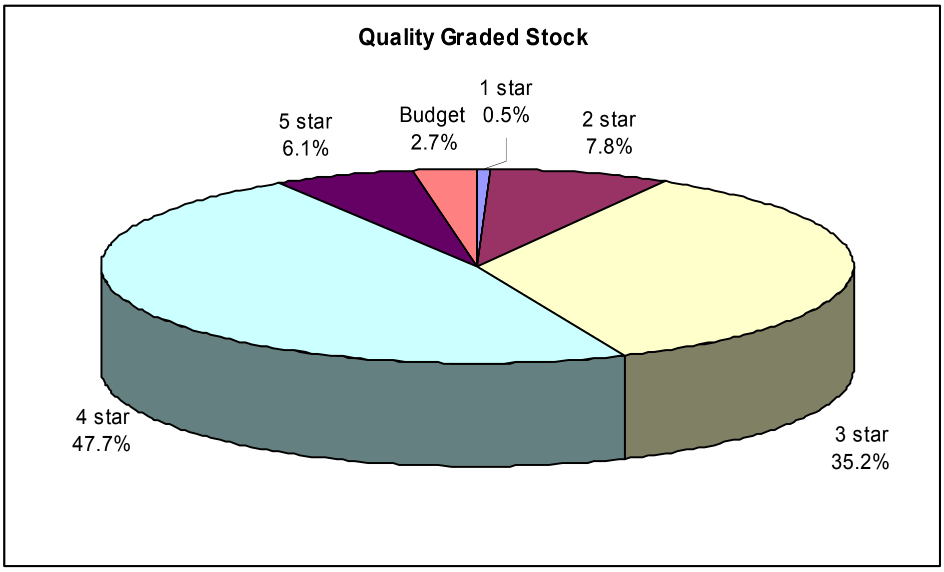
3.2 Quality grading – South East overall

Around two-fifth's (41.5%) of the South East's accommodation stock was found to be quality assured, either through the EnjoyEngland or AA quality assurance schemes.

58.5% of the region's accommodation stock was not quality assessed at the time the audit was conducted. However 160 businesses (1.7%) were, at the time the data was being collected, waiting to be graded.

The majority of the 3,855 quality assured accommodation businesses were either classified as 4 star (47.7% of total graded) or classified as 3 star (35.2%). Very few accommodation businesses were graded as either 1 star or 2 star (0.5% and 7.8% respectively). Around 6.1% of businesses had been awarded the highest grade of 5 star for 'exceptional accommodation with a degree of luxury'. 2.7% of all quality assessed accommodation were classified as Star Budget.

Figure 2: Spilt of total quality graded stock (South East)



3.3 Sector analysis

3.3.1 Serviced accommodation

A total of 6,064 serviced accommodation businesses have been identified through this audit and were by far the largest represented accommodation sector in the South East in terms of number of businesses (representing 65.2% of all known accommodation stock).

These businesses accounted for an estimated 87,192 rooms (55% of all available rooms or pitches in the region), offering in the region 179,154 bedspaces (40% of all available bedspaces in the region).

Table 3: South East serviced accommodation stock analysis

South East Total	
No. Businesses	6,064
No. Bedrooms or pitches	87,192
No. Bedspaces	179,154
No. Quality Assured	2,094
	34.5%
No. Ungraded	3,971
	65.5%

Around one third (34.5%) of the South East's serviced accommodation stock was quality assured, either through the EnjoyEngland or AA quality assurance schemes.

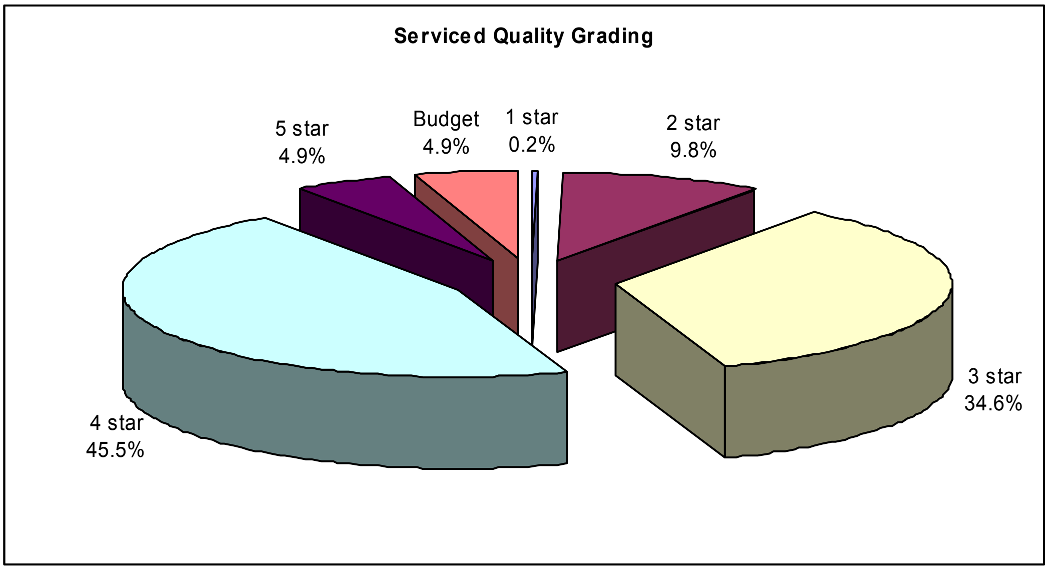
Around sixty-six percent of the region's serviced accommodation stock was not quality assessed at the time of the Audit.

The majority of the 2,094 quality assured serviced accommodation was either classified as 4 star (45.5%) or classified as 3 star (34.6%). Very few serviced accommodation businesses were graded as 1 star or Star Budget (0.2% and 4.9% respectively). Around 4.9% of serviced accommodation businesses were awarded the highest grade of 5 star.

Table 4: Number of quality graded serviced accommodation businesses

South East Serviced Quality Graded Total	2,094
1 Star	5
2 Star	206
3 Star	724
4 Star	953
5 Star	103
Star Budget	103

Figure 3: South East serviced accommodation quality grading spilt



3.3.2 Self catering accommodation

A total of 2,649 self catering businesses (including agencies offering accommodation in the South East) have been identified through this audit, representing 28.5% of all accommodation stock (the second largest sector after serviced accommodation – see table 1).

These businesses accounted for an estimated 10,520 bedrooms (7% of all available rooms or pitches in the region), and offering 21,415 bedspaces (5% of all available bedspaces in the region).

Table 5: South East self catering accommodation stock analysis

South East Total	
No. Businesses	2,649
No. Bedrooms or pitches	10,520
No. Bedspaces	21,415
No. Quality Assured	1,560
	58.9%
No. Ungraded	1,089
	41.1%

Around three fifths of the region's self catering accommodation stock was quality assured (59%); either through the EnjoyEngland or AA quality assurance scheme, which was by far the greatest proportion of quality assured accommodation out of all the sectors.

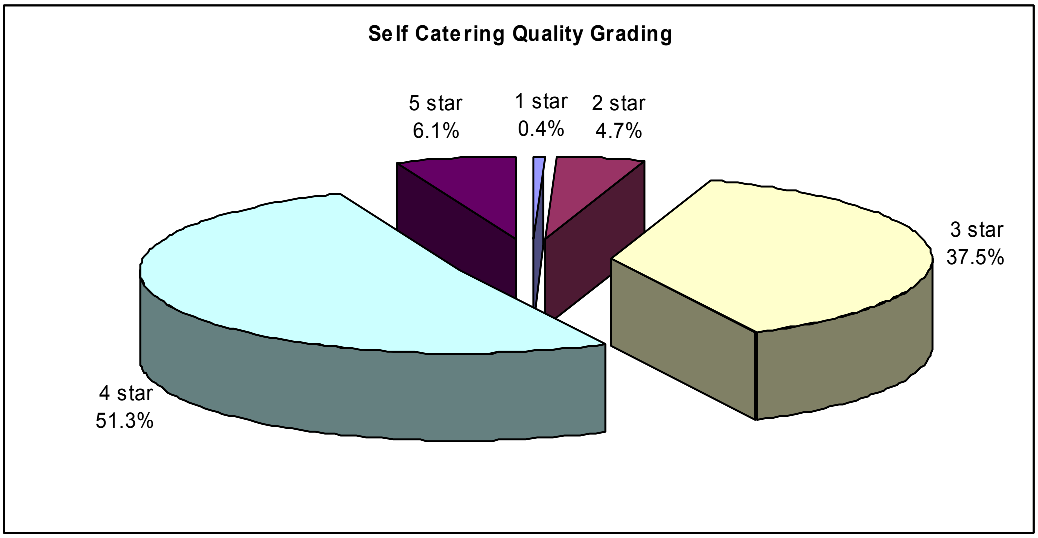
Forty-one percent of the region's self catering accommodation was not quality assessed at the time of the Audit.

Over half of the 1,560 quality assured self catering accommodation was either classified as 4 star (51.3%) and a further 37.5% were classified as 3 star. Very few self catering establishments were graded below 3 star. Six percent of self catering businesses were awarded the highest grade of 5 star.

Table 6: Number of quality graded self catering accommodation businesses

South East Self Catering Quality Graded Total	1,560
1 Star	7
2 Star	73
3 Star	585
4 Star	800
5 Star	95

Figure 4: South East self catering accommodation quality grading spilt



3.3.3 Caravan and camping accommodation

A total of 488 caravan and camping businesses have been identified through this audit, representing 5% of all known accommodation stock (see table 1).

These businesses accounted for around 49,868 pitches (31.2% of all available rooms or pitches in the region), and offering 229,685 bedspaces (51.4% of all available bedspaces in the region).

Table 7: South East caravan and camping accommodation stock analysis

South East Total	
No. Businesses	488
No. Bedrooms or pitches	49,868
No. Bedspaces	229,685
No. Quality Assured	173
	35.5%
No. Ungraded	315
	64.5%

Over a third (35.5%) of the South East's caravan and camping stock was quality assured, either through the EnjoyEngland or AA quality assurance schemes.

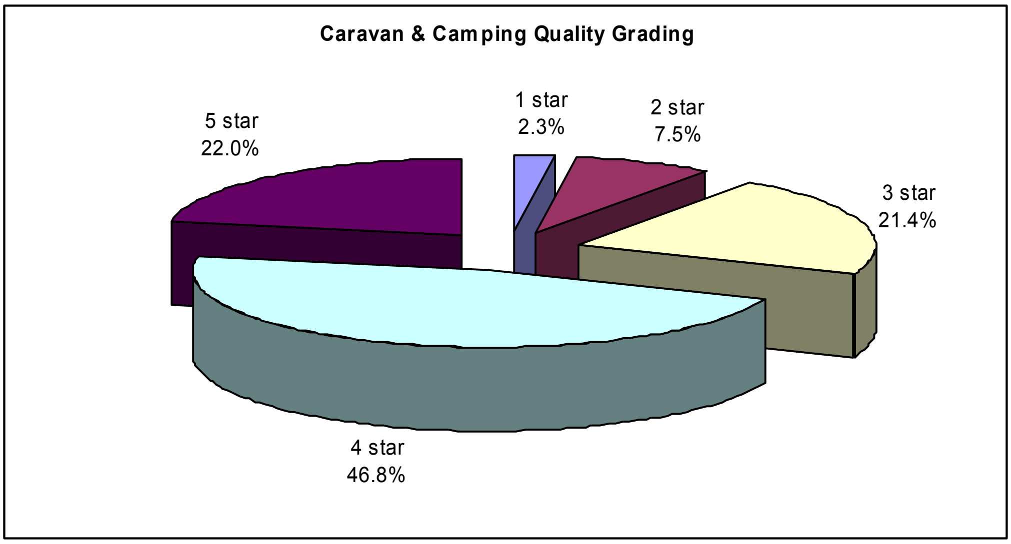
Sixty-five percent of the region's caravan and camping stock was not quality assessed at the time of the Audit.

The majority of the 171 quality assured caravan and camping accommodation was either classified as 4 star (46.8%), 5 star or (22.0%) or 3 star (21.4%). Very few caravan and camping businesses were graded below 3 star.

Table 8: Number of quality graded caravan & camping accommodation businesses

South East Caravan & Camping Quality Graded Total	173
1 Star	4
2 Star	13
3 Star	37
4 Star	81
5 Star	38

Figure 5: South East caravan and camping accommodation quality grading spilt



3.3.4 Group Accommodation

A total of 95 group accommodation businesses have been identified through this audit, representing 1% of all known accommodation stock (see figure 1).

Group accommodation accounted for an estimated 12,210 rooms (8% of all available rooms or pitches in the region), offering 16,817 bedspaces (3.8% of all available bedspaces in the region).

Table 9: South East group accommodation stock analysis

South East Total	
No. Businesses	95
No. Bedrooms or pitches	12,210
No. Bedspaces	16,817
No. Quality Assured	28
	29.5%
No. Ungraded	67
	70.5%

Around one third of the South East's group accommodation stock was quality assured, either through the EnjoyEngland or AA quality assurance schemes.

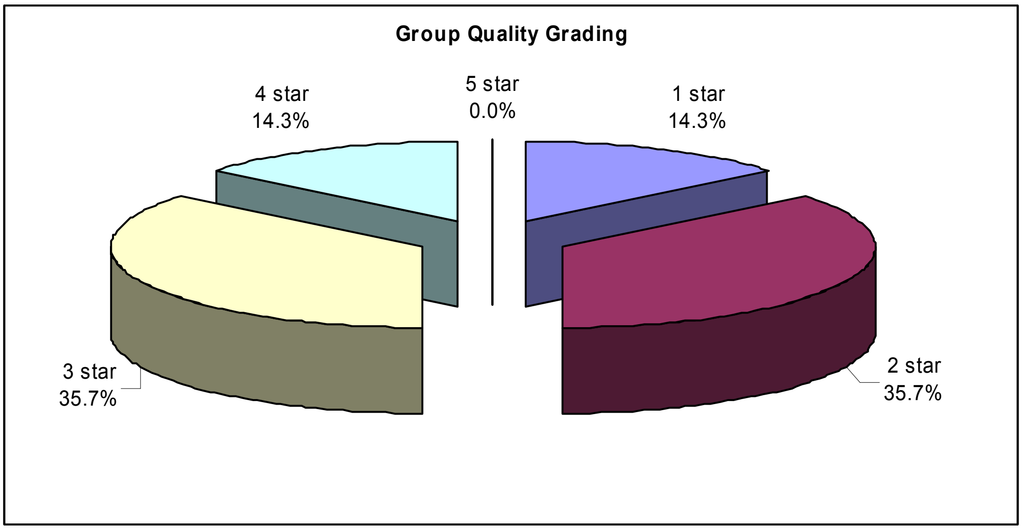
Seventy-one percent of the region's group accommodation stock was not quality assessed at the time of the Audit.

The bulk of quality assured group accommodation was either classified as 2 star or 3 star (35.7% in both cases). There were no 5 star graded businesses.

Table10: Number of quality graded group accommodation businesses

South East Group Quality Graded Total	28
1 Star	4
2 Star	10
3 Star	10
4 Star	4
5 Star	0

Figure 6: South East group accommodation quality grading spilt



3.4 Sub-regional analysis

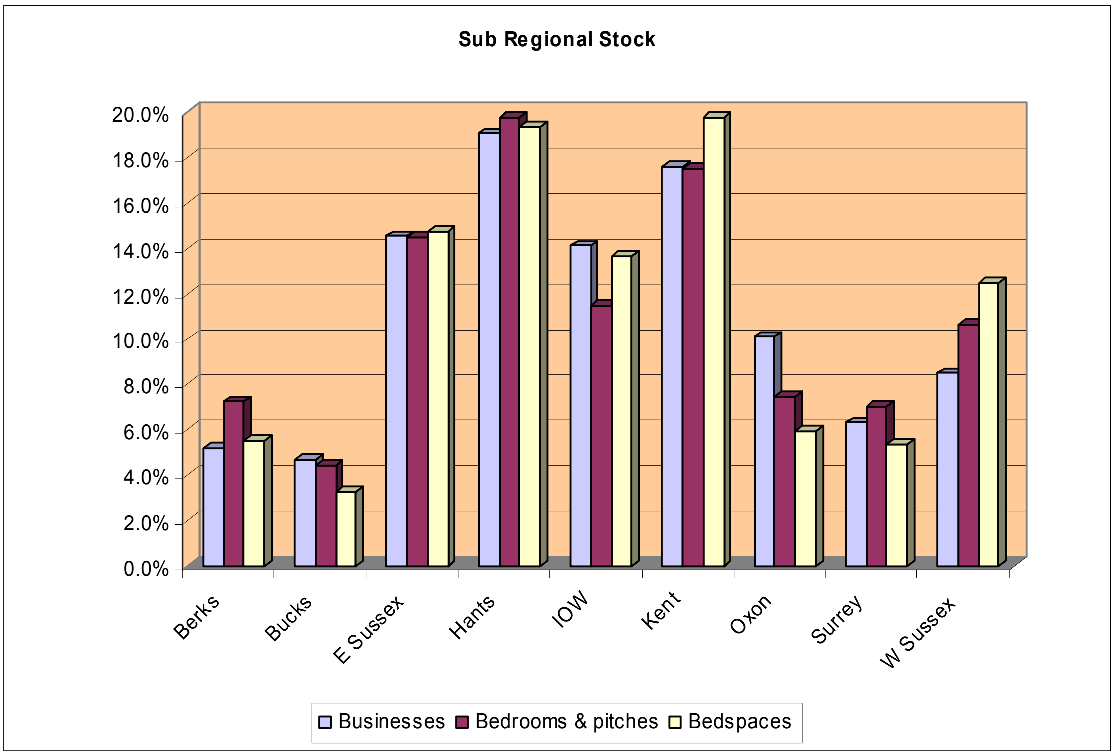
The following section provides a detailed analysis of accommodation stock at sub-regional level in terms of total businesses, rooms or pitches available, and bedspaces, the amount of quality assured stock and an analysis of the type of accommodation available in each sub-region. *More detail is available in Appendix 3 for each sub-region and is broken down further by district and borough in Appendix 4.*

3.4.1 Total businesses, rooms, bedspaces by sub-region

Hampshire (19.0%), Kent (17.5%), East Sussex (14.5%) and the IOW (14.1%) shared the largest proportion of the South East's accommodation stock, whereas Buckinghamshire (4.7%), Berkshire (5.2%), and Surrey (6.3%) had the smallest amount of the region's accommodation stock.

In terms of rooms and pitches, both Hampshire (19.7%) and Kent (17.5%) had the highest proportions, while Buckinghamshire (4.5%) and Surrey (7.0%) shared the smallest proportion of bedroom or pitch stock. Almost one in five of the region's bedspaces is located in Kent (19.7%) and another fifth in Hampshire (19.3%). Surrey (5.4%) and Buckinghamshire (3.3%) both accounted for a small proportion of the region's bedspaces.

Figure 7: Sub-region accommodation stock analysis



3.4.2 Sub-region accommodation quality grading analysis

The IOW had the highest proportion (53.0%) of quality assured accommodation stock (as a proportion of all available stock in that area), while Berkshire (32.0%) and Surrey (32.0%) had the smallest proportion of quality assured stock. Quality assured stock accounted for between 36 – 46% of the remaining sub-regions' accommodation stock.

Figure 8: % quality assured accommodation by sub-region

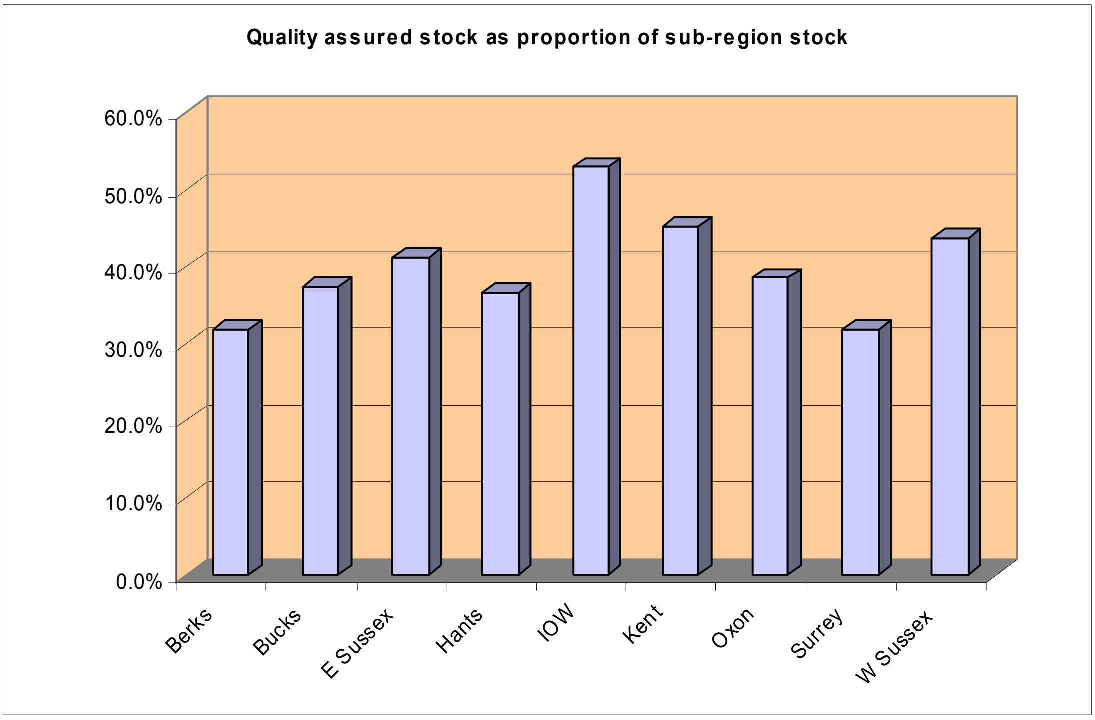


Table 11: Sub-region accommodation stock analysis

	No. Businesses		No. Bedrooms/pitches		No. Bedspaces		No. Quality Assured		No. Ungraded		No. Unknown		No. Estimated	
	Count	%	Count	%	Count	%	Count	%	Count	%	Count	%	Count	%
Berkshire	479	5.2	11,579	7.2	24,632	5.5	154	32.2	325	67.8	3	0.6	68	14.2
Buckinghamshire	438	4.7	7,112	4.5	14,631	3.3	164	37.4	274	62.6	8	1.8	37	8.4
East Sussex	1,350	14.5	23,152	14.5	65,849	14.7	557	41.3	793	58.7	9	0.7	422	31.3
Hampshire	1,770	19.0	31,547	19.7	86,849	19.3	649	36.7	1,121	63.3	4	0.2	233	13.2
IOW	1,311	14.1	18,365	11.5	60,965	13.6	695	53.0	616	47.0	0	0.0	264	20.1
Kent	1,631	17.5	27,917	17.5	88,149	19.7	740	45.4	891	54.6	0	0.0	534	32.7
Oxfordshire	940	10.1	11,912	7.5	26,703	6.0	362	38.5	578	61.5	12	1.3	188	20.0
Surrey	588	6.3	11,200	7.0	24,010	5.4	188	32.1	400	67.9	2	0.3	94	16.0
West Sussex	789	8.5	17,006	10.6	55,637	12.4	345	43.7	444	56.3	8	1.0	147	18.6
South East Total	**9,296**	**100**	**159,790**	**100**	**447,071**	**100**	**3855**		**5,441**		**46**		**1,987**	

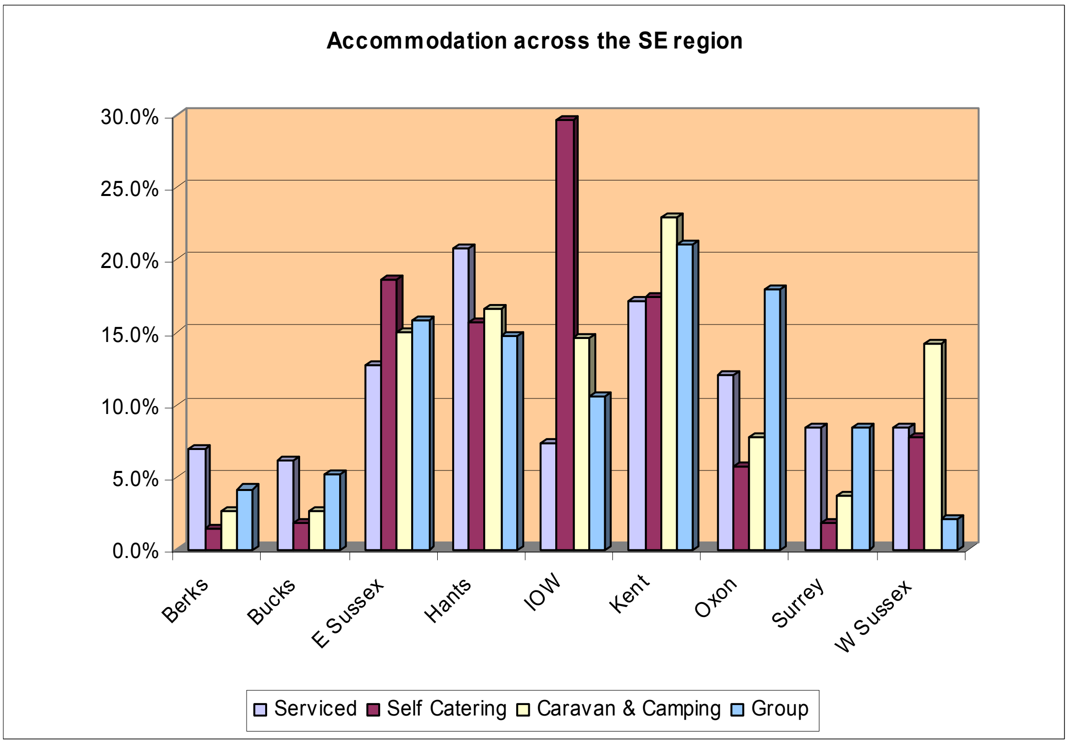
Table12: Sub-region accommodation quality grading analysis

	1 star		2 star		3 star		4 star		5 star		Star Budget Hotel		**TOTAL**	
	Count	%	Count	%	Count	%	Count	%	Count	%	Count	%	**Count**	**%**
Berkshire	0	0.0	18	6.0	50	3.7	74	4.0	4	1.7	8	7.8	**154**	**4.0**
Buckinghamshire	2	10.0	26	8.6	50	3.7	70	3.8	4	1.7	12	11.7	**164**	**4.0**
East Sussex	3	15.0	28	9.3	193	14.2	272	14.8	56	23.7	5	4.9	**557**	**14.5**
Hampshire	3	15.0	49	16.2	246	18.1	291	15.8	34	14.4	26	25.2	**649**	**16.8**
IOW	8	40.0	63	20.9	257	19.0	329	17.9	37	15.7	1	1.0	**695**	**18.0**
Kent	0	0.0	39	12.9	218	16.1	406	22.1	56	23.7	21	20.4	**740**	**19.2**
Oxfordshire	1	5.0	23	7.6	137	10.0	172	9.4	20	8.5	9	8.7	**362**	**9.4**
Surrey	2	10.0	24	7.9	79	5.8	68	3.7	4	7.1	12	11.7	**189**	**4.9**
West Sussex	1	5.0	32	10.6	126	9.3	156	8.5	21	8.9	9	8.7	**345**	**9.0**
South East Total	**20**	**100**	**302**	**100**	**1,356**	**100**	**1,838**	**100**	**236**	**100**	**103**	**100**	**3,855**	**100**

3.4.3 Sub-region accommodation type

The graph below shows the proportion of each accommodation type spilt across the region. The majority of the region's caravan and camping businesses were located in Kent (23.0%), followed by Hampshire (16.6%), East Sussex (15.0%) and the Isle of Wight (14.5%). Kent, Oxfordshire, East Sussex and Hampshire were all home to the majority of the South East's group accommodation businesses (21.1%, 17.9%, 15.8% and 14.7% respectively). The IOW had the highest proportion of the self catering businesses (29.6%). Serviced accommodation was spilt relatively evenly among the sub-regions compared to the other accommodation types with Hampshire (20.8%) and Kent (17.1) having slightly higher proportions.

Figure 9: Accommodation type by sub-region



With the exception of the IOW, serviced accommodation was the most predominant type of accommodation in most sub-regions. Self catering accommodation was the largest sector on the IOW accounting for 60% of all accommodation on the Island. Caravan & camping and group accommodation were only very small proportions of each sub-region.

Figure 10: Proportion of accommodation type within each separate sub-region

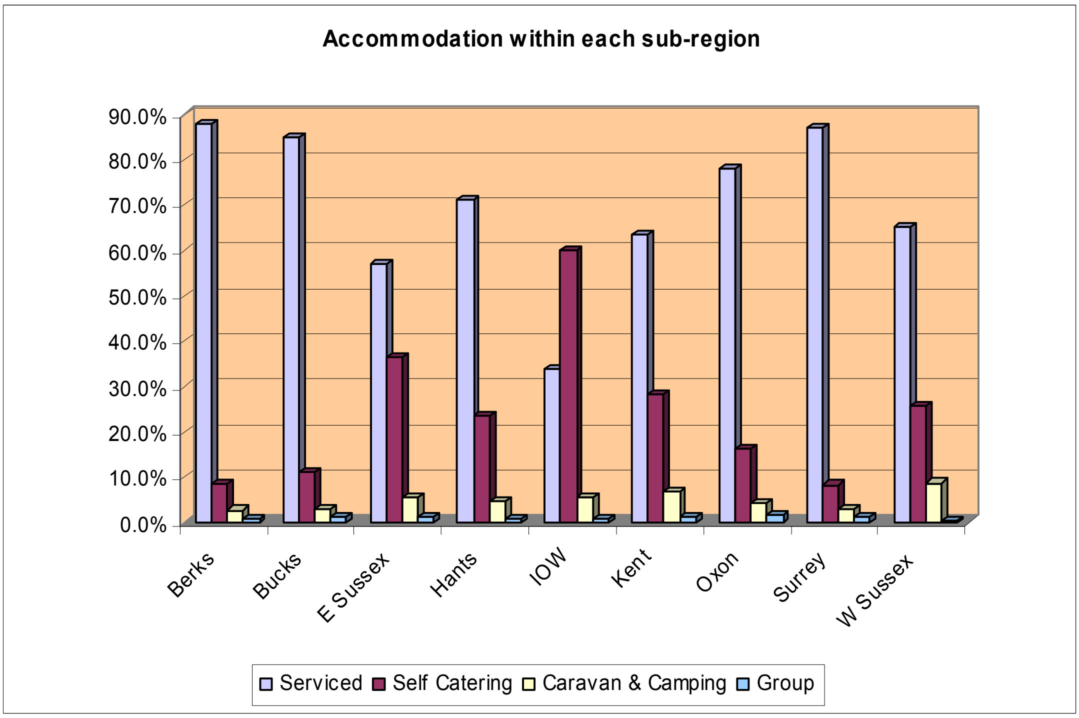


Table 13: Sub-region accommodation stock analysis – by business type

	Caravan and Camping		Group		Self Catering		Serviced		**TOTAL**	
	Count	%	Count	%	Count	%	Count	%	**Count**	**%**
Berkshire	13	2.7	4	4.2	40	1.5	422	7.0	**479**	**5.2**
Buckinghamshire	13	2.7	5	5.3	48	1.8	372	6.1	**438**	**4.7**
East Sussex	73	15.0	15	15.8	494	18.6	768	12.7	**1,350**	**14.5**
Hampshire	81	16.6	14	14.7	416	15.7	1,259	20.8	**1,770**	**19.0**
IOW	71	14.5	10	10.5	785	29.6	445	7.3	**1,311**	**14.1**
Kent	112	23.0	20	21.1	461	17.4	1,038	17.1	**1,631**	**17.5**
Oxfordshire	38	7.8	17	17.9	152	5.7	733	12.1	**940**	**10.1**
Surrey	18	3.7	8	8.4	49	1.8	513	8.5	**588**	**6.3**
West Sussex	69	14.1	2	2.1	204	7.7	514	8.5	**789**	**8.5**
Total	**488**	**100**	**95**	**100**	**2,649**	**100**	**6,064**	**100**	**9,296**	**100**

Table 14: Proportion of accommodation stock per sub-region.

	Caravan and Camping		Group		Self Catering		Serviced		**TOTAL**	
	Count	%	Count	%	Count	%	Count	%	**Count**	**%**
Berkshire	13	2.7	4	0.8	40	8.4	422	88.1	**479**	**100**
Buckinghamshire	13	3.0	5	1.1	48	11.0	372	84.9	**438**	**100**
East Sussex	73	5.4	15	1.1	494	36.6	768	56.9	**1,350**	**100**
Hampshire	81	4.6	14	0.8	416	23.5	1,259	71.1	**1,770**	**100**
IOW	71	5.4	10	0.8	785	59.9	445	33.9	**1,311**	**100**
Kent	112	6.9	20	1.2	461	28.3	1,038	63.6	**1,631**	**100**
Oxfordshire	38	4.0	17	1.8	152	16.2	733	78.0	**940**	**100**
Surrey	18	3.1	8	1.4	49	8.3	513	87.2	**588**	**100**
West Sussex	69	8.7	2	0.3	204	25.9	514	65.1	**789**	**100**

4 Accessible Accommodation

4.1 South East overall

A total of 681 accommodation businesses out of 9,296 (7.3%) in the South East were found to have disability access of some kind. Accommodation with disabled access was spilt into four different categories:

- Category one was investigating which businesses were part of the National Accessible Scheme (NAS).
- Category two involved finding out which businesses had their disabled access approved by Radar.
- Category three was investigating how many Local Authorities recommended on their website, or just listed, accommodation within their area that had disabled access.
- Category four involved finding any other accommodation businesses that had not been mentioned in the previous three sections but were also accessible for people with disabilities. These businesses were found through various sources including websites and accessibility guides.[3]

The 681 businesses accounted for an estimated 43,738 bedrooms or pitches and offered approximately 118,510 bedspaces. All accommodation was known to be trading as of 31st March 2008.

Table 15: Disabled access stock

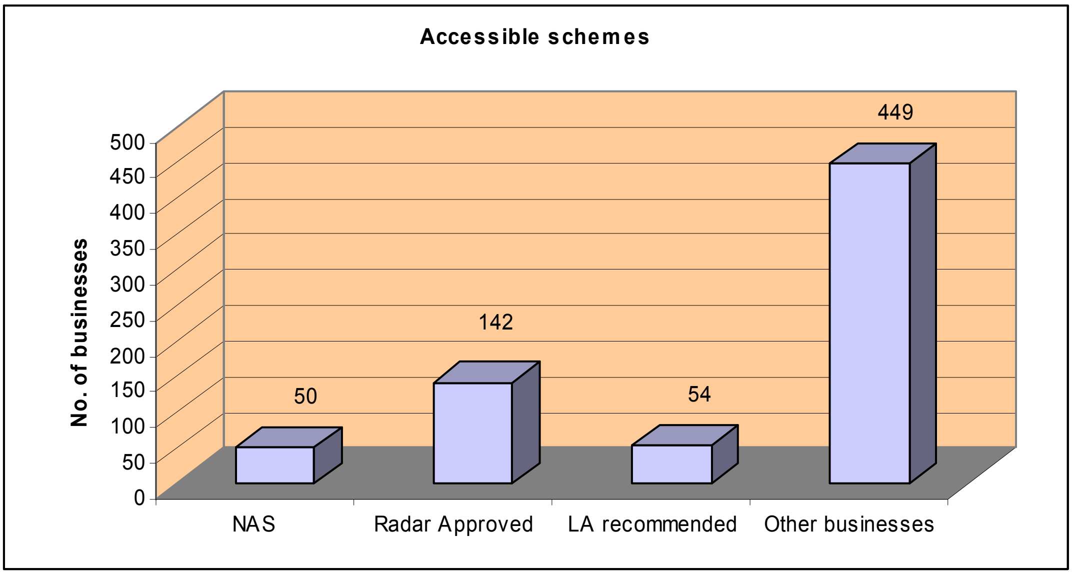
	No. Businesses		No. Bedrooms or pitches		No. Bedspaces		No. Quality Assured		No. Ungraded	
	Count	%	Count	%	Count	%	Count	%	Count	%
Total South East	**681**		**43,738**		**118,510**		**365**	**53.6**	**316**	**46.4**
Part of NAS	50	7.3	2,381	5.4	7,695	6.5	46	92.0	4	8.0
Radar Approved	142	20.9	16,207	37.9	44,970	37.9	63	44.4	79	55.6
LA recommended	54	7.9	2,851	6.5	5,788	4.9	24	44.4	30	55.6
Other accessible businesses	449	65.9	23,016	52.6	61,579	52.0	246	49.3	203	40.7

Note: The count and percentages for no. businesses, bedrooms /pitches and bedspaces do not add up to totals and 100% due to some businesses were both approved by Radar and recommended by a Local Authority so will have been calculated twice. This table is merely to show the number of businesses, rooms and spaces in each separate access category. Percentage of quality assured is calculated by number graded in each category out of total in that category.

[3] Many accessible businesses were found through council tourist/visitors websites that list accommodation, attractions etc in their county and have the option of searching for accessible accommodation. Some websites focusing entirely on accessibility in the South East were also used. Other sources included accessibility guides and brochures.

50 individual businesses are part of the NAS, 142 businesses had access approved by Radar and the Local Authorities recommended 54 individual accommodation businesses. 449 (65.9%) businesses had disabled access of some kind but were not part of NAS, had not been approved by Radar and were not listed on a Local Authority website. This accounted for an estimated 23,016 bedrooms or pitches, offering 61,579 bedspaces in the region.

Figure 11: Disabled access by scheme



Around 54% of all accommodation businesses with disabled access were quality assured either through the EnjoyEngland or AA quality assurance schemes.

4.2 Disabled access by sector

Almost four-fifths of the all the accessible accommodation was located in the serviced sector (78.6%). Self catering represented about thirteen percent and caravan & camping and group accommodation represented just under 9% of all accessible accommodation between them.

Table 16: Accessible accommodation stock by sector

South East Accessible Total	672	%
Serviced	535	78.6
Self Catering	89	13.1
Caravan & Camping	51	7.5
Group	6	0.9

4.2.1 Serviced Accommodation

A total of 535 accommodation businesses were identified with disabled access in the serviced sector representing 78.6% of the total number of accommodation with disabled access in the South East (see table 16).

These businesses accounted for 30,153 bedrooms (68.9% of the total number of bedrooms and pitches with disabled access in the South East) offering in the region 63,902 bedspaces (56.4% of all accessible bedspaces).

Table 17: Disabled access within serviced accommodation

	No. Businesses		No. Bedrooms,		No. Bedspaces		No. Quality Assured		No. Ungraded	
	Count	% of count	Count	% of count	Count	% of count	Count	%	Count	%
Total South East	**535**	**78.6**	**30,153**	**68.9**	**63,902**	**56.4**	**252**	**47.1**	**283**	**52.9**
Part of NAS	20	3.7	917	3.0	1,854	2.9	17	85.0	3	15.0
Radar Approved	107	20	11,147	37.0	23,244	36.4	39	36.4	68	63.6
LA recommended	51	9.5	2,822	9.4	5,720	9.0	20	39.2	31	60.8
Other accessible businesses	363	67.9	15,941	52.9	34,512	54.0	180	49.6	183	50.4

Note: Total count and % for no. businesses, no. bedrooms and no. bedspaces will not add up to total SE and 100% respectively due to some businesses falling in two categories. Each access category was separately calculated out of the total for that accommodation type. However with grading, % of quality assured was total % graded within each separate category (not out of total graded). Therefore each count and % of quality assured and ungraded businesses together should equal total count of that separate category and 100% respectively.

Two-fifths of all businesses that were part of the NAS were located in the serviced accommodation sector. However they accounted for only 3.7% of all accessible serviced accommodation.

Seventy-five percent of Radar Approved accommodation businesses were located in the serviced sector yet they only made up 20% of all accessible serviced accommodation.

Nine different Local Authorities recommended accessible serviced accommodation on their websites. They recommended 51 different serviced accommodation businesses between them accounting for 94.4% of all Local Authority recommended accessible accommodation in the South East. However the recommended businesses only made up 9.5% of all serviced accommodation with disabled access.

363 other serviced accommodation businesses (67.9% of all accessible serviced accommodation) were known to have disabled access but not be part of an official scheme or recommendation.

Around 47% of all serviced accommodation with disabled access was quality assured either through the EnjoyEngland or AA quality assurance schemes.

4.2.2 Self Catering Accommodation

A total of 89 accommodation businesses were identified with disabled access in the self catering sector representing 13.2% of the total accommodation with disabled access in the South East (see table 16).

These businesses accounted for 677 bedrooms (1.5% of the total number of bedrooms and pitches with disabled access in the South East) offering in the region 1,486 bedspaces (1.3% of all accessible bedspaces).

Table 18: Disabled access within self catering accommodation

	No. Businesses		No Bedrooms		No. Bedspaces		No. Quality Assured		No. Ungraded	
	Count	%	Count	%	Count	%	Count	%	Count	%
Total South East	**89**	**13.2**	**677**	**1.5**	**1,486**	**1.3**	**61**	**68.5**	**28**	**31.5**
Part of NAS	20	22.5	86	12.7	183	12.3	18	90.0	2	10.0
Radar Approved	25	28.1	125	18.5	264	17.8	10	40.0	15	60.0
LA recommended	2	2.2	14	2.1	28	1.9	2	100.0	0	0
Other accessible businesses	50	56.2	495	73.1	1,105	74.4	38	76.0	12	24.0

Note: Total count and % for no. businesses, no. bedrooms// pitches and no. bedspaces will not add up to total SE and 100% respectively due to some businesses falling in two categories. Each access category was separately calculated out of the total for that accommodation type. However with grading, % of quality assured was total % graded within each separate category (not out of total graded). Therefore each count and % of quality assured and ungraded businesses together should equal total count of that separate category and 100% respectively.

Two-fifths of all businesses that were part of the NAS were located in the self catering accommodation sector. However they accounted for only 22.5% of all accessible self catering accommodation.

Eighteen percent of Radar Approved accommodation businesses were located in the self catering sector yet they made up 28% of all accessible self catering accommodation. 18.5% of all accessible self catering rooms were Radar Approved.

Two Local Authorities recommended accessible self catering accommodation on their websites. The recommended businesses only made up 2.2% of all self catering accommodation with disabled access.

50 other accommodation businesses (56.2% of all accessible self catering accommodation) were known to have disabled access but not be part of an official scheme or recommendation. They accounted for 495 (73.1%) of all accessible self catering bedrooms.

Around 69% of all self catering accommodation with disabled access was quality assured either through the EnjoyEngland or AA quality assurance schemes.

4.2.3 Caravan and Camping Accommodation

A total of 51 accommodation businesses were identified with disabled access in the caravan and camping sector representing 7.5% of the total number of accommodation with disabled access in the South East

These businesses accounted for 11,476 pitches (26.2% of the total number of bedrooms and pitches with disabled access in the South East) offering in the region 50,931 bedspaces (40.4% of all accessible bedspaces).

Table 19: Disabled access within caravan & camping accommodation

	No. Businesses		No. pitches		No. Bedspaces		No. Quality Assured		No. Ungraded	
	Count	%	Count	%	Count	%	Count	%	Count	%
Total South East	**51**	**7.5**	**11,476**	**26.2**	**50,931**	**40.4**	**43**	**84.3**	**8**	**15.7**
Part of NAS	10	19.6	1,378	12.0	5,658	11.1	10	100.0	0	0.0
Radar Approved	9	17.6	4,185	36.5	712	40.7	8	88.9	1	11.1
LA recommended	0	0	0	0	0	0	0	0.0	0	0.0
Other accessible businesses	32	62.7	5,913	51.5	24,561	48.2	24	75.0	6	25.0

Note: Total count and % for no. businesses, no. bedrooms/ pitches and no. bedspaces will not add up to total SE and 100% respectively due to some businesses falling in two categories. Each access category was separately calculated out of the total for that accommodation type. However with grading, % of quality assured was total % graded within each separate category (not out of total graded). Therefore each count and % of quality assured and ungraded businesses together should equal total count of that separate category and 100% respectively.

Twenty percent of all businesses that were part of the NAS were located in the caravan and camping accommodation sector. However they accounted for only 19.6% of all accessible self catering accommodation

Six percent of Radar Approved accommodation businesses were located in the caravan and camping sector yet they made up 17.6% of all accessible caravan and camping accommodation.

Thirty-two other accommodation businesses (62.7% of all accessible caravan and camping accommodation) were known to have disabled access but not be part of an official scheme or recommendation.

Around 84% of all caravan and camping accommodation with disabled access was quality assured either through the EnjoyEngland or AA quality assurance schemes.

4.2.4 Group Accommodation

A total of 6 accommodation businesses were identified with disabled access in the group sector representing 0.9% of the total number of accommodation with disabled access in the South East.

These businesses accounted for 1,432 bedrooms (3.3% of the total number of bedrooms and pitches with disabled access in the South East) offering in the region 2,191 bedspaces (1.9% of all accessible bedspaces)

Table 20: Disabled access within group accommodation

	No. Businesses		No. Bedrooms		No. Bedspaces		No. Quality Assured		No. Ungraded	
	Count	%	Count	%	Count	%	Count	%	Count	%
Total South East	**6**	**0.9**	**1,432**	**3.3**	**2,191**	**1.9**	**5**	**83.3**	**1**	**16.7**
Part of NAS	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0
Radar Approved	1	16.7	750	52.4	750	34.2	1	100.0	0	0.0
LA recommended	1	16.7	15	1.0	40	1.8	1	100.0	0	0.0
Other accessible businesses	5	83.3	682	47.6	1,441	65.8	4	80.0	1	20.0

Note: Total count and % for no. businesses, no. bedrooms / pitches and no. bedspaces will not add up to total SE and 100% respectively due to some businesses falling in two categories. Each access category was separately calculated out of the total for that accommodation type. However with grading, % of quality assured was total % graded within each separate category (not out of total graded). Therefore each count and % of quality assured and ungraded businesses together should equal total count of that separate category and 100% respectively.

No group businesses were identified as being part of NAS.

Less than 1% of Radar Approved accommodation businesses were located in the group sector yet they made up 16.7% of all accessible group accommodation.

One Local Authority recommended one accessible group accommodation on their website.

Five other accommodation businesses (83% of all accessible group accommodation) were known to have disabled access but not be part of an official scheme or recommendation.

Eighty-three percent of all group accommodation with disabled access was quality assured either through the EnjoyEngland or AA quality assurance schemes.

4.3 Sub-regional analysis

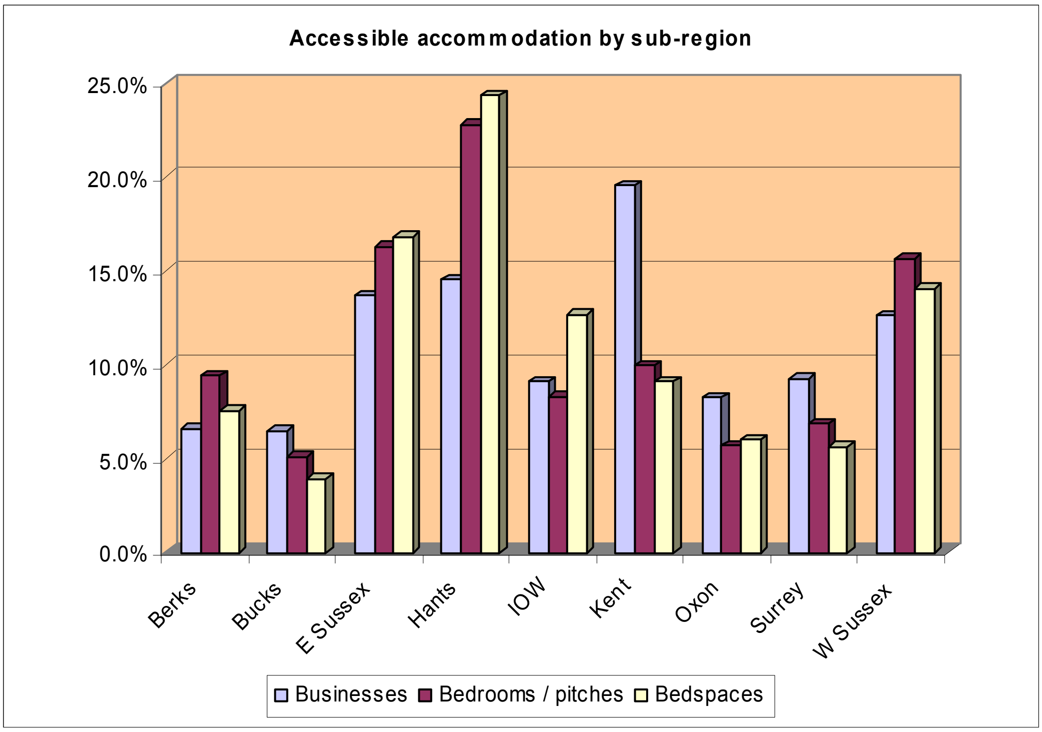
The following section provides a detailed analysis of the accessible accommodation stock at sub-regional level. *More detail is available on accessible accommodation business numbers in each district and borough is available in Appendix 5.*

4.3.1 Total accessible accommodation businesses by sub-region.

Kent (19.5%), Hampshire (14.5%), East Sussex (13.7%) and West Sussex (12.6%) shared the largest proportion of the South East's accessible accommodation stock, whereas Buckinghamshire (6.5%), Berkshire (6.6%), and Oxfordshire (8.2%) had the smallest amount of the region's accessible accommodation stock.

In terms of accessible rooms and pitches, both Hampshire (22.8%) and East Sussex (16.3%) had the highest proportions, while Buckinghamshire (5.1%) and Oxfordshire (5.7%) shared the smallest amount of accessible bedroom or pitch stock. Almost a quarter of the region's accessible bedspaces were located in Hampshire (24.3%) followed by East Sussex which had 16.8%. Buckinghamshire (3.9%) and Surrey (5.6%) both accounted for a small proportion of the region's accessible bedspaces.

Figure 12: Sub region accessible accommodation stock analysis



4.3.2 NAS, Radar Approved and LA recommended by sub-region type

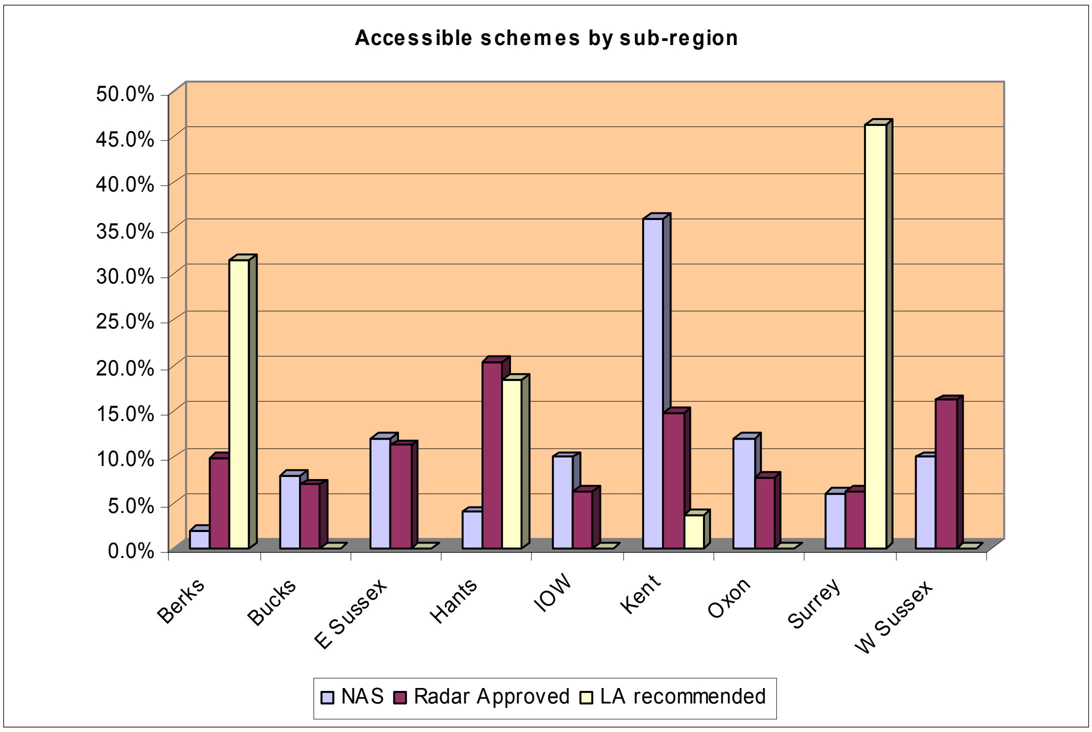
Over one third of the accommodation businesses who are part of NAS were found in Kent (36%). All other sub-regions had between 6-12% except both Berkshire and Hampshire which only had 2% & 4% respectively of the total accommodation businesses who are part of NAS.

However Hampshire had the largest proportion of accessible accommodation businesses which had been approved by Radar (20.4%). West Sussex and Kent also shared a higher proportion (16.2% and 14.8% respectively). Surrey and IOW had the smallest proportion at 6.3% each and the remainder sub-regions had between 7 – 12%.

Only four regions had Local Authorities that recommended accessible accommodation stock. Surrey had 46.3% of all recommended businesses followed by Berkshire (31.5%), Hampshire (18.5%) and lastly Kent (3.7%). Within Surrey six different Local Authorities had recommended various accessible accommodation businesses, two different local authorities in Berkshire and one each in Hampshire and Kent.

However it is necessary to note that although the remainder of the Local Authorities in each region did not list any accessible accommodation in their area some of them had links to external websites (often run by the County Council) which listed accommodation stock in the surrounding area. However even some of these links did not mention accessible accommodation.

Figure 13: NAS, Radar Approved & LA recommended by sub-region



Within each region there were other accessible accommodation businesses which were not part of NAS, had not been approved by Radar or recommended by Local Authorities. These businesses were found either on websites or through accessibility guides. Some accommodation businesses also listed any accessible facilities on their own websites. A total of 449 other accessible accommodation businesses were found. Kent had the highest proportion of these businesses with 93 (20.7%) extra accessible accommodation businesses in their region. East Sussex had 73 (16.3%) and Hampshire had 60 (13.4%). Berkshire, Surrey and Buckinghamshire had the lowest proportions of extra accessible accommodation (3.1%, 6.7% and 6.7% respectively).

Figure 14: Extra accessible businesses in sub-regions

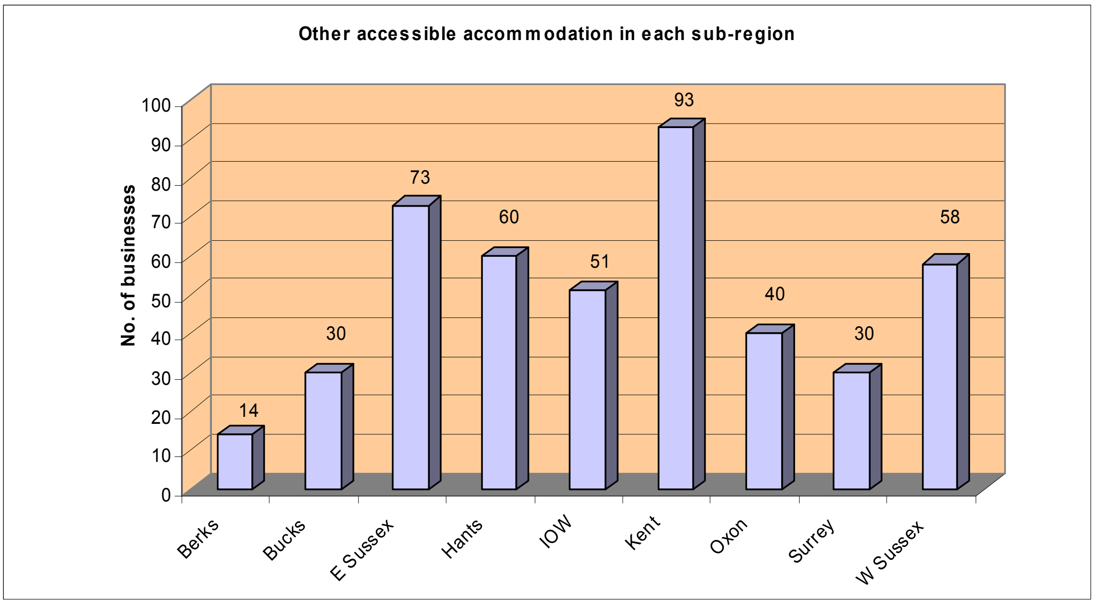


Table 21: Sub regional accessible accommodation stock analysis

	No. Businesses		No. Bedrooms or pitches		No. Bedspaces		No. Quality Assured		No. Ungraded		No. Estimated	
	Count	%	Count	%	Count	%	Count	%	Count	%	Count	%
Berkshire	45	6.6	4,114	9.4	8,920	7.5	19	42.2	26	57.8	5	11.1
Buckinghamshire	44	6.5	2,241	5.1	4,623	3.9	24	54.5	20	45.5	0	0.0
East Sussex	93	13.7	7,127	16.3	19,906	16.8	47	50.5	46	49.5	19	20.4
Hampshire	99	14.5	9,970	22.8	28,851	24.3	59	59.6	40	40.4	7	7.1
IOW	62	9.1	3,617	8.3	15,004	12.7	44	71.0	18	29.0	13	21.0
Kent	133	19.5	4,353	10.0	10,769	9.1	79	51.4	54	40.6	40	30.1
Oxfordshire	56	8.2	2,476	5.7	7,120	6.0	32	57.1	24	42.9	12	21.4
Surrey	63	9.3	3,009	6.9	6,693	5.6	25	40.0	38	60.3	4	6.3
West Sussex	86	12.6	6,831	15.6	16,624	14.0	36	41.9	50	58.1	8	9.3
South East Total	**681**	**100**	**43,738**	**100**	**118,510**	**100**	**325**		**316**		**108**	

Table 22: Sub regional accessible accommodation schemes

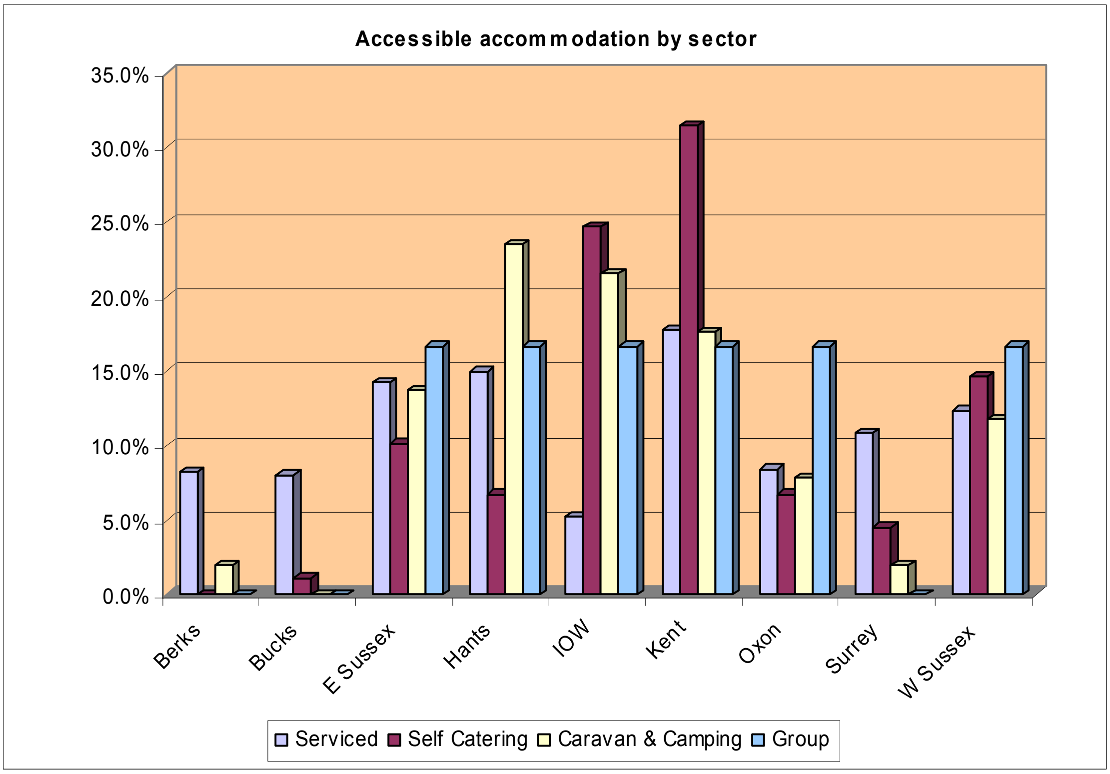
	No. Businesses In NAS		No. approved by Radar		No. Businesses recommended by LA		No. other accessible accommodation	
	Count	%	Count	%	Count	%	Count	%
Berkshire	1	2.0	14	9.9	17	31.5	14	3.1
Buckinghamshire	4	8.0	10	7.0	0	0.0	30	6.7
East Sussex	6	12.0	16	11.3	0	0.0	73	16.3
Hampshire	2	4.0	29	20.4	10	18.5	60	13.4
IOW	5	10.0	9	6.3	0	0.0	51	11.4
Kent	18	36.0	21	14.8	2	3.7	93	20.7
Oxfordshire	6	12.0	11	7.7	0	0.0	40	8.9
Surrey	3	6.0	9	6.3	25	46.3	30	6.7
West Sussex	5	10.0	23	16.2	0	0.0	58	12.9
South East Total	**50**	**100**	**142**	**100**	**54**	**100**	**449**	**100**

4.4 Sub-regional accessible accommodation type

The graph below shows the proportion of each accessible accommodation type spilt across the region. Kent had the highest proportion of accessible serviced accommodation (17.8%) followed by Hampshire (15%) and East Sussex (14.2%). Hampshire and the IOW had just under half of the region's accessible caravan and camping sites between them (23.5% and 21.6% respectively).

The IOW and Kent had over half of the region's accessible self catering accommodation (31.5% Kent and 24.7% IOW). Only five regions had accessible group accommodation which was evenly spread out at one group accommodation each.

Figure 15: Accessible accommodation in sub-region by sector



Serviced accommodation was by far the most predominant type of accessible accommodation within each sub-region. The IOW was the only exception in which serviced accommodation did not make up more than 70% of all accessible accommodation and another accommodation type came close to the serviced sector proportion. And this was in the total of accessible self catering businesses (35.5% self catering and 45.2% serviced). Caravan & Camping and group accommodation were only very small proportions of each sub-region.

Figure 16: Proportion of accessible accommodation per sub-region

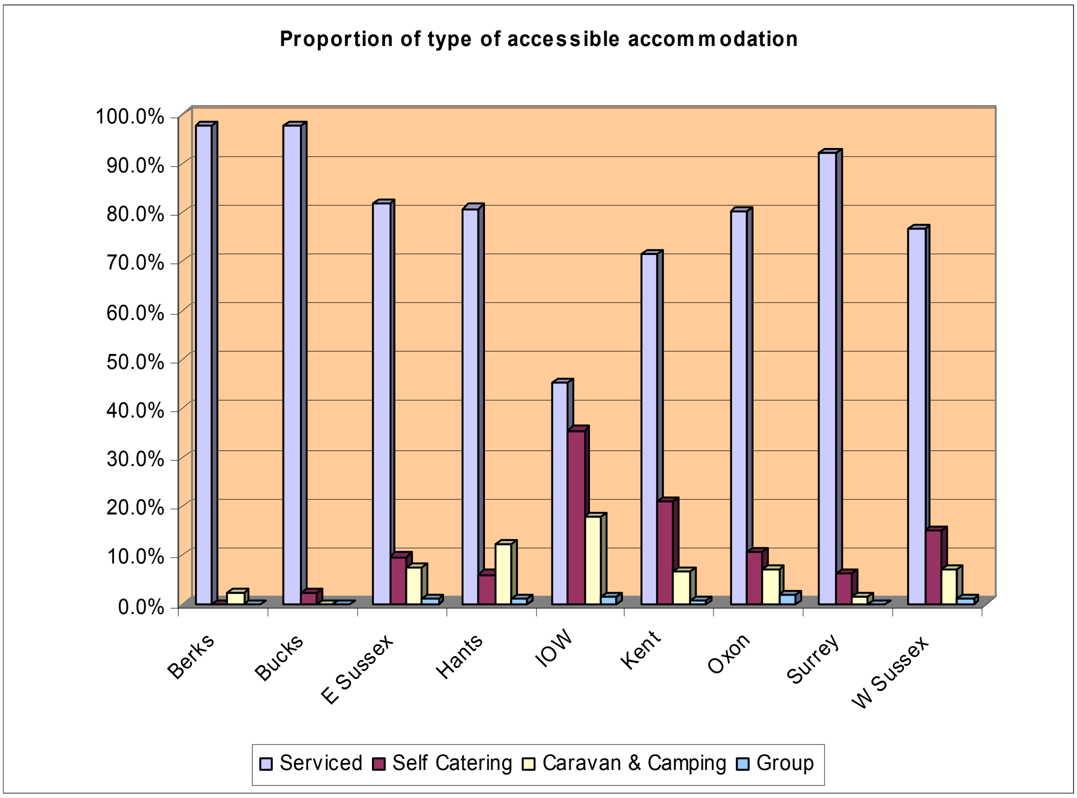


Table 23: Sub regional accessible accommodation stock analysis by business type

	Caravan and Camping		Group		Self Catering		Serviced		**TOTAL**	
	Count	%	Count	%	Count	%	Count	%	**Count**	**%**
Berkshire	1	2.0	0	0.0	0	0.0	44	8.2	**45**	**6.6**
Buckinghamshire	0	0	0	0.0	1	1.1	43	8.0	**44**	**6.5**
East Sussex	7	13.7	1	16.7	9	10.1	76	14.2	**93**	**13.7**
Hampshire	12	23.5	1	16.7	6	6.7	80	15.0	**99**	**14.5**
IOW	11	21.6	1	16.7	22	24.7	28	5.2	**62**	**9.1**
Kent	9	17.6	1	16.7	28	31.5	95	17.8	**133**	**19.5**
Oxfordshire	4	7.8	1	16.7	6	6.7	45	8.4	**56**	**8.2**
Surrey	1	2.0	0	0.0	4	4.5	58	10.8	**63**	**9.3**
West Sussex	6	11.8	0	16.7	13	14.6	66	12.3	**86**	**12.6**
South East Total	**51**	**100**	**6**	**100**	**89**	**100**	**535**	**100**	**681**	**100**

Table 24: Proportion of each accessible accommodation type per sub-region

	Caravan and Camping		Group		Self Catering		Serviced		**TOTAL**	
	Count	%	Count	%	Count	%	Count	%	**Count**	**%**
Berkshire	1	2.2	0	0.0	0	0.0	44	97.8	**45**	**100**
Buckinghamshire	0	0.0	0	0..0	1	2.3	43	97.7	**44**	**100**
East Sussex	7	7.5	1	1.1	9	9.7	76	81.7	**93**	**100**
Hampshire	12	12..1	1	1.0	6	6.1	80	80.8	**99**	**100**
IOW	11	17.7	1	1.6	22	35.5	28	45.2	**62**	**100**
Kent	9	6.8	1	0.8	28	21.1	95	71.4	**133**	**100**
Oxfordshire	4	7.1	1	1.8	6	10.7	45	80.4	**56**	**100**
Surrey	1	1.6	0	0.0	4	6.3	58	92.1	**63**	**100**
West Sussex	6	7.0	0	1.2	13	15.1	66	76.7	**86**	**100**
South East Total	**51**		**6**		**89**		**535**		**681**	

5 Recommendations for Year Three (April 2008 – March 2009)

Year Three of the audit will consist of:

- Updating the audit with any new accommodation and remove of any businesses that have closed down within the past year.
- Update of quality grading (especially of those who were waiting for grading this year).
- Update the disability audit with any new businesses.
- Addition of data on conference and meetings facilities offered at accommodation;
- Addition of data on green accreditation (Green Tourism Business Scheme);

Since the audit is now more robust and precise than the first year collection better comparisons can be made from year three onwards to determine the changes that are taking place amongst the accommodation in the South East.

6 Appendix 1: Estimates of rooms / pitches and bedspaces

Where data was missing for the number of rooms / pitches or bedspaces, estimates were made to fill in these gaps. The calculations are detailed as follows:

6.1 Hotels, guest houses, B&Bs:

The average number of rooms and bedspaces available for different types of serviced accommodation were calculated from existing data. The table below lists averages for the different serviced accommodation types.

Table i: Estimate of hotel, guest house, B&B rooms and bedspaces

	B&B		Farm B&B		Small hotel, guest house		Large hotel	
	Rooms	Bedspaces	Rooms	Bedspaces	Rooms	Bedspaces	Rooms	Bedspaces
Kent	3	7	3	6	10	21	34	70
IOW	3	7	3	6	13	31	26	58
West Sussex	4	7	2	5	7	14	60	124
Surrey	3	5	4	6	14	20	40	84
East Sussex	3	6	3	5	10	19	42	83
Berks, Bucks, Hants, Oxon	3	6	3	6	11	21	40	84

Table ii: Estimate of country house hotel, budget hotel and inn rooms and bedspaces

	Country house hotel		Budget hotel i.e Travelodge		Pub or inn	
	Rooms	Bedspaces	Rooms	Bedspaces	Rooms	Bedspaces
Kent	24	48	47	116	8	17
IOW	33	68	42	168	8	17
West Sussex	22	44	78	197	7	14
Surrey	74	143	45	117	6	13
East Sussex	17	33	35	83	7	14
Berks, Bucks, Hants, Oxon	34	65	49	136	7	15

6.2 Self catering house, flat, cottage or chalet:

One self catering bedroom was assumed to have an average of 2 bedspaces.

6.3 Caravan & Camping:

Estimates were made of the number of bedspaces each different type of ‘pitch’ accounted for. For example:

A touring pitch was assumed to have up to 4 bedspaces.

A static caravan or chalet was assumed to have up to 6 bedspaces.

Where no distinction was made between touring, static or chalets, each pitch was assumed to have up to 5 bedspaces.

6.4 Group accommodation:

Each room was assumed to sleep one person.

7 Appendix 2: South East Accommodation Stock Analysis

See extra PDF spreadsheet

8 Appendix 3: Sub-Region Accommodation Stock Analysis

See extra PDF spreadsheets

9 Appendix 4: District & Borough Accommodation Stock Analysis

See extra PDF spreadsheets

10 Appendix 5: Sub-Region Accessible Accommodation Stock Analysis

See extra PDF spreadsheets

11 Appendix 6: District & Borough Accessible Accommodation Stock Analysis

See extra PDF spreadsheets