Accommodation Report

Q1-Q4 2009

Mar 2010

Research Team
South West Tourism

South West England
southwesttourism
The Regional Tourist Board for the South West of England

Self-Catering Data 2009

The Self Catering data to date is shown for each of the DMO samples in the SW region in the table below. Data for Devon is not available to SW Tourism, and does not contribute to the SW Region percentages. Unitary Councils include Bath and Bristol.

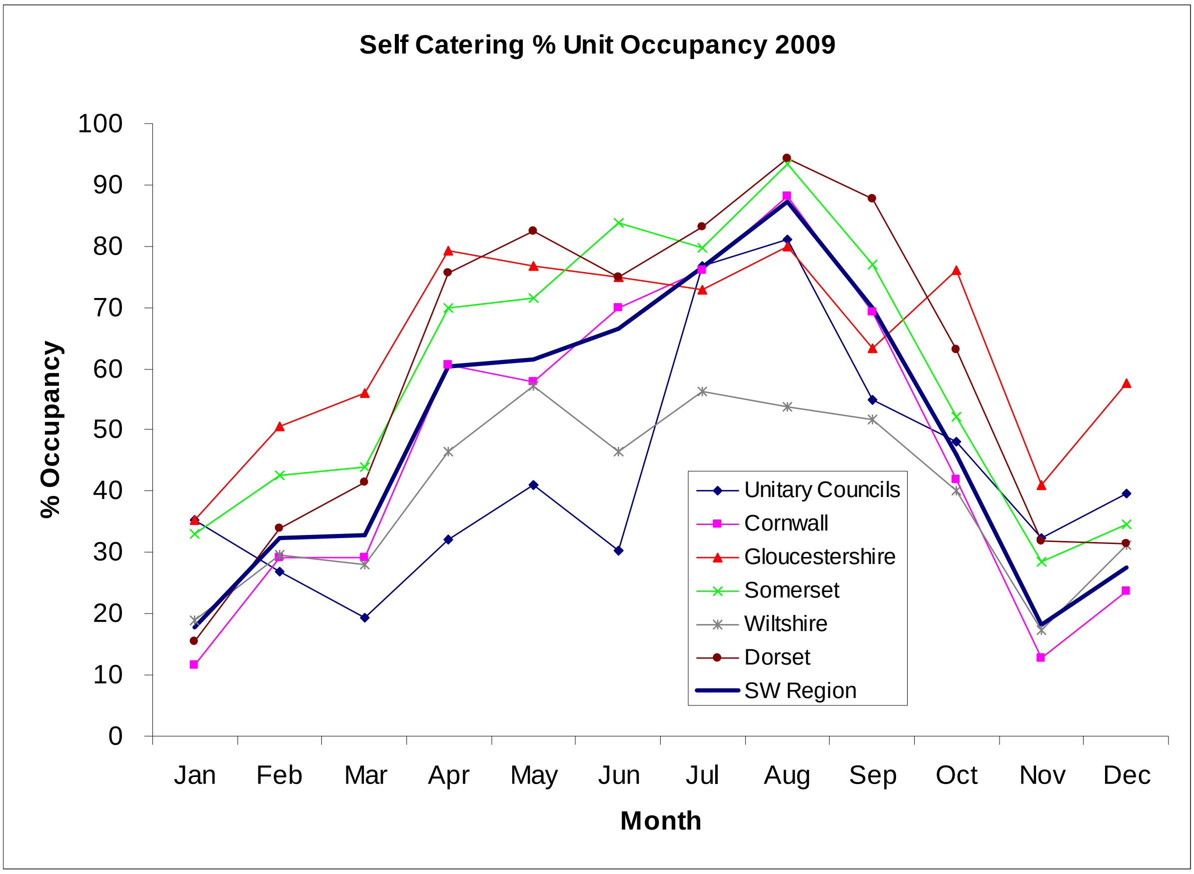
Self Catering % Unit Occupancy 2009

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Unitary Councils	35^	27^	19^	32*	41*	30*	77^	81^	55^	48^	32^	40^
Cornwall	12	29	29	61	58	70	76	88	69	42	13	24
Gloucestershire	35^	51^	56^	79*	77*	75*	73^	80^	63^	76^	41^	58^
Somerset	33	43	44	70	72	84	80	94	77	52	29	35
Wiltshire	19*	30*	28*	46*	57*	46*	56*	54*	52*	40*	17*	31*
Dorset	16^	34^	42^	76^	82^	75^	83^	94^	88^	63^	32^	32^
Region	**18**	**32**	**33**	**60**	**62**	**67**	**77**	**87**	**70**	**46**	**18**	**28**

*sample size less than 10 ^ sample less than 30

Region is a weighted average, accounting for the different numbers in each county

Cornwall's larger sample size affects the regional average.



We note a typical increase in occupancy over towards, with the beginnings of a decline in September. There are obvious differences between the DMOs; with Dorset and Somerset performing above the regional average, whilst Wiltshire is below the regional average, at most points, although that may be an artefact of the low sample size in Wiltshire. November was a particularly poor month for the region.

Note line graph used for clarity, and not meant to imply intermediate values exist between the months

Camping and Caravanning Pitch Data 2009

The pitch occupancy of each of the DMO samples in the SW region is shown below (Devon data is not collected by SW Tourism, and does not contribute to the SW Region percentages). There is considerable uncertainty in these figures due to low return rates.

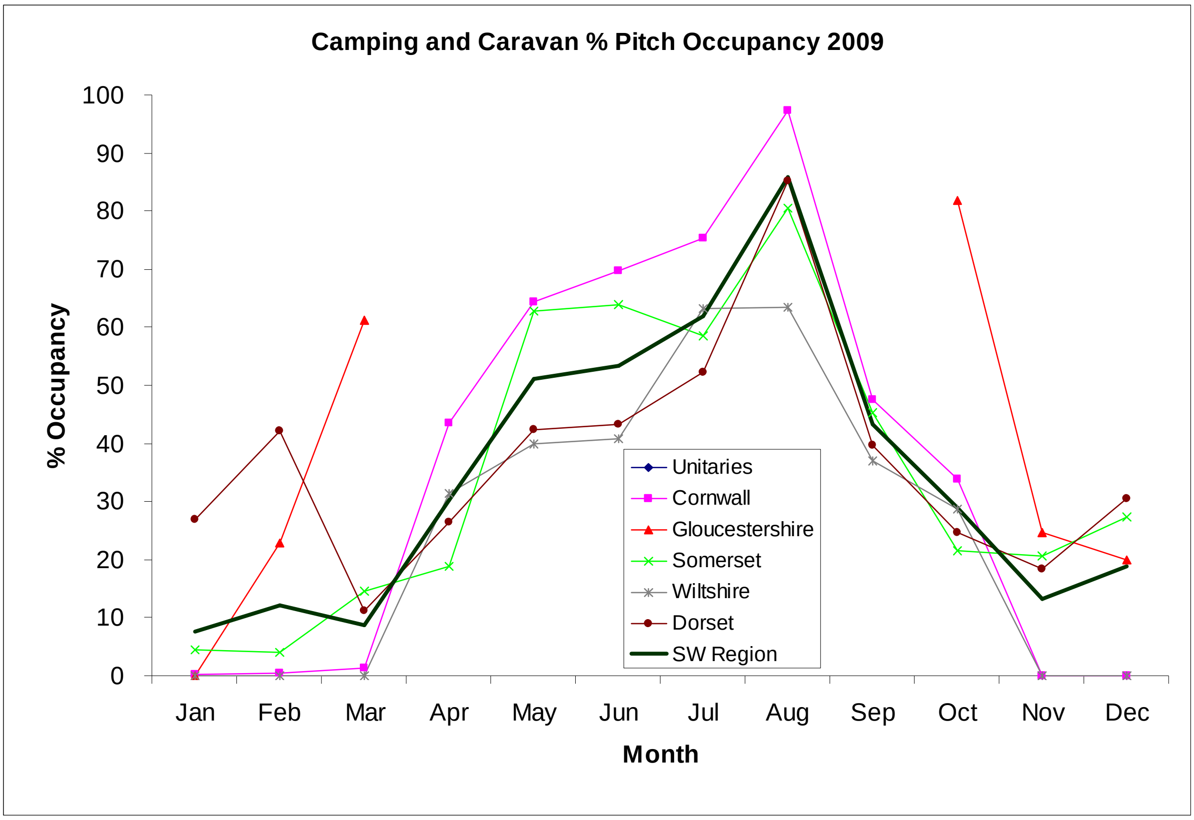
Camping and Caravan % Pitch Occupancy 2009

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Unitary Councils	-	-	-	-	-	-	-	-	-	-	-	-
Cornwall	0^	0^	1^	44*	64*	70*	76*	97*	46*	34*	0*	0*
Gloucestershire	0*	23*	61*	-	-	-	-	-	-	82*	25*	20*
Somerset	5*	4 *	15*	19*	63*	64*	59*	81*	45*	22*	21*	27*
Wiltshire	0*	0 *	0*	31*	40*	41*	63*	64*	37*	29*	0*	0*
Dorset	27*	42*	11*	27*	42*	43*	52*	85*	40*	25*	18*	30*
SW Region	**16^**	**25^**	**12^**	**27^**	**48^**	**49^**	**59^**	**87^**	**42^**	**29^**	**13^**	**19^**

Region is a weighted average, accounting for the different numbers in each county.

*sample size less than 10 ^ sample less than 30

- no data



Regionally, September to December saw a heavy slump; however, it must be remembered that the sample sizes are small in this analysis. Thus, there is considerable uncertainty in the estimates presented. Gloucestershire and Wiltshire are particularly low and are presented for interest only.

Note line graph used for clarity, and not meant to imply intermediate values exist between the months

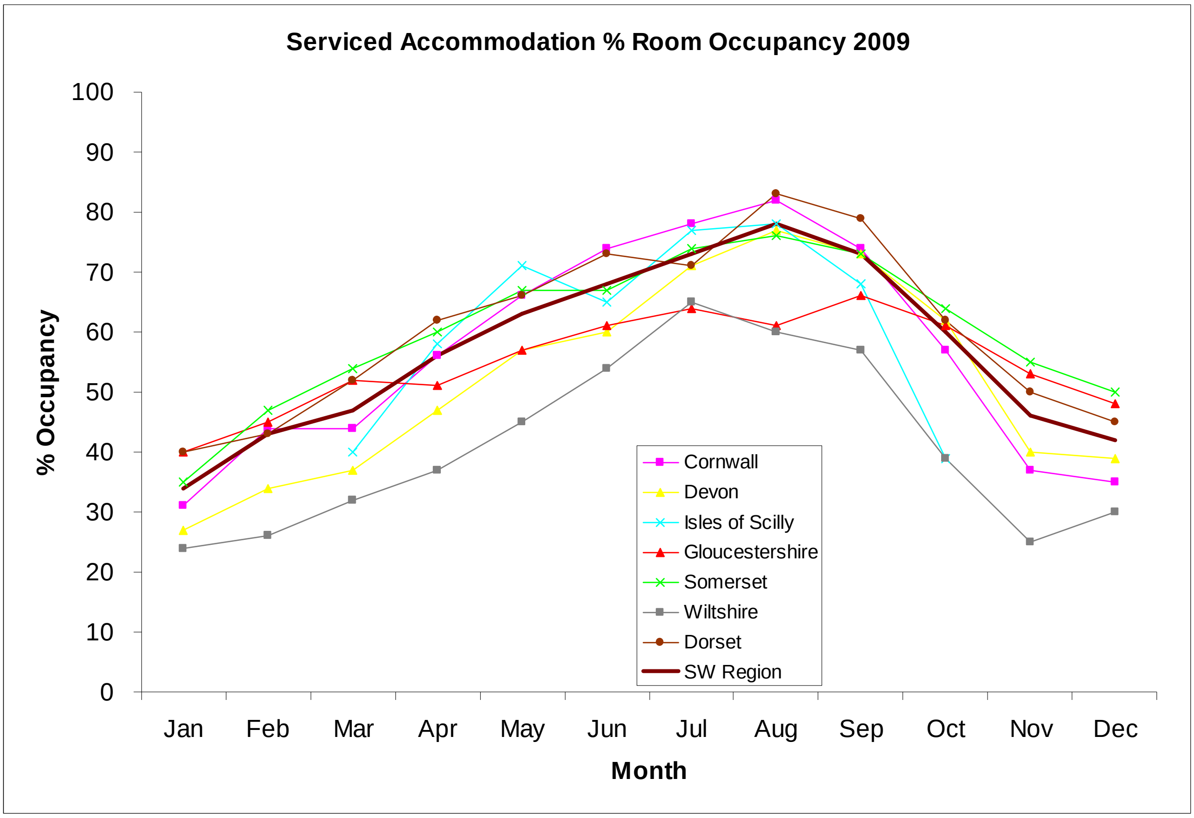
Serviced Accommodation 2009

The room occupancy of each of the DMO samples in the SW region is shown below. The data in this table considers the Isles of Scilly separately from Cornwall, and so is not directly comparable to the tables for Self Catering and Camping Data.

Serviced Room % Occupancy 2009

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Cornwall	31	44	44	56	66	74	78	82	74	57	37	35
Devon	27	34	37	47	57	60	71	77	73	62	40	39
Isles of Scilly	-	-	40*	58*	71*	65*	77*	78*	68*	39*		
Gloucestershire	40	45	52	51	57	61	64	61	66	61	53	48
Somerset	35	47	54	60	67	67	74	76	73	64	55	50
Wiltshire	24*	26*	32*	37*	45*	54*	65*	60	57	39	25*	30*
Dorset	40	43	52	62	66	73	71	83	79	62	50	45
SW Region	**34**	**43**	**47**	**56**	**63**	**68**	**73**	**78**	**73**	**60**	**46**	**42**

* sample size less than 10
- no data



The data show a steady rise in occupancy in each of the regions, from January to July. Devon displays a below regional average occupancy for the period until September, as does Wiltshire (although in this case the low sample size reduces our confidence in the figures). Dorset is has higher occupancy than the region average for almost all of the year. Somerset and Gloucestershire have strong final quarters.

Note line graph used for clarity, and not meant to imply intermediate values exist between the months

Comparison of Accommodation types.

The self-catering, and camping and caravanning data are contrasted with the serviced accommodation for the region over this period. It should be noted that Devon data is included in the serviced accommodation sample. The Regional Average All types is a weighted average that accounts for the different sample sizes, and uses room occupancy data for serviced accommodation and not bed occupancy.

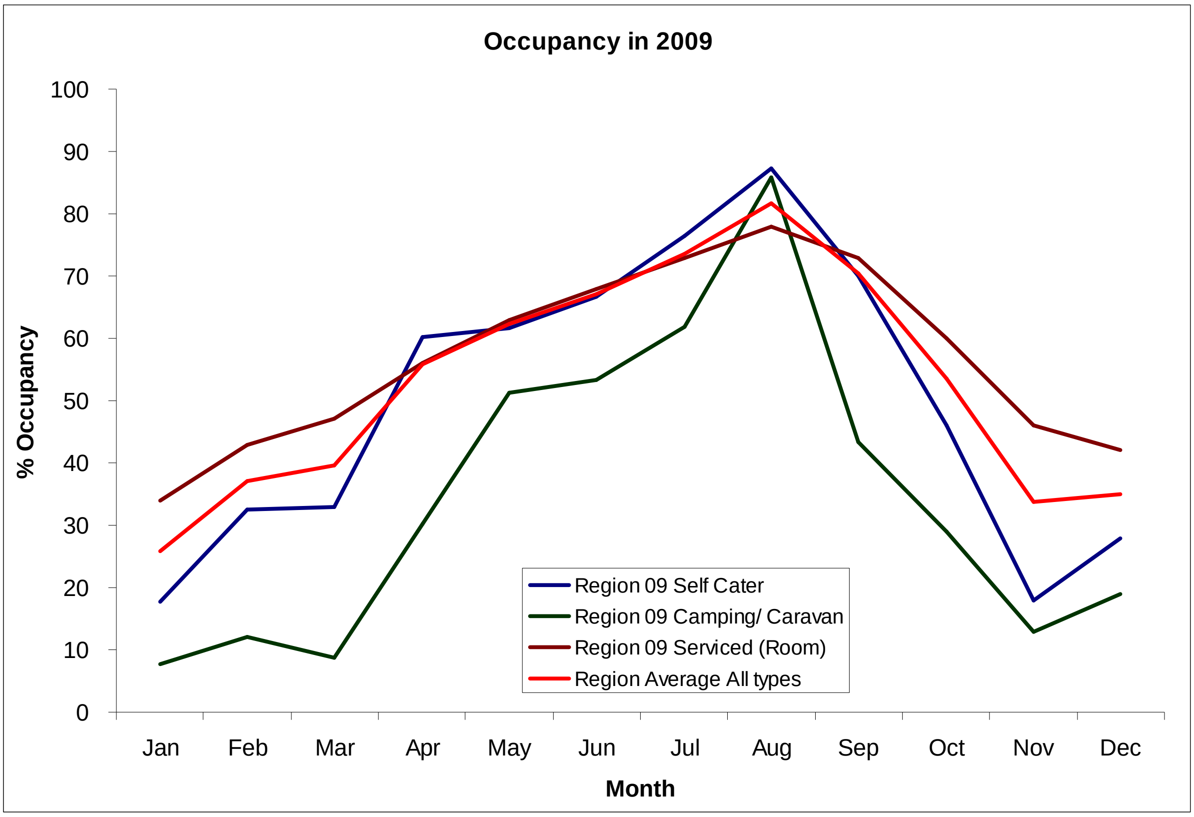
Comparison of Occupancy Rates of Accommodation, SW 2009

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Region 09 Self Cater	18	32	33	60	62	67	77	87	70	46	18	28
Region 09 Camping/ Caravan	16	25	12	27^	48^	49^	59	87	42	29	13	19
Region 09 Serviced (Room)	34	43	47	56	63	68	73	78	73	60	46	42
Region Average All types	26	38	40	56	62	67	73	82	70	54	34	35

Region Average All types is a weighted average, accounting for different sample sizes.

^ sample size less than 20

- no data

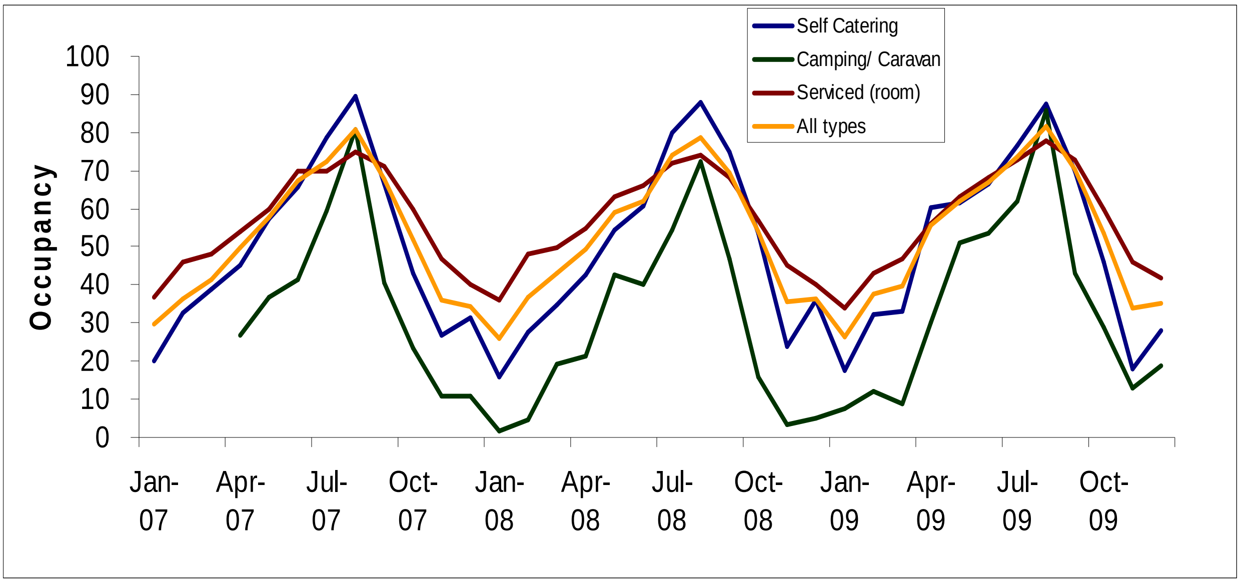


Camping and caravanning was beneath the regional average for much of the year, although a lower sampling size for this type reduces our confidence in the figures. Overall, there was an increase in occupancy per month of about 5%, until August; with September seeing a fall. November was particularly hard for the Self Catering accommodation in our sample, with a improvement in December. Whilst serviced accommodation continued to fall.

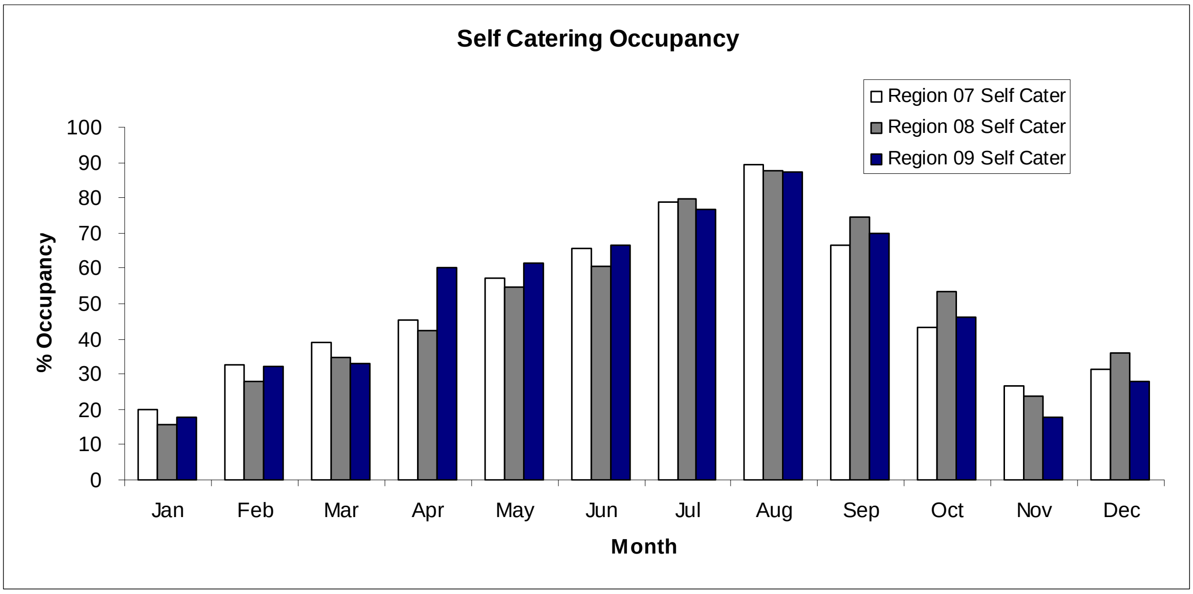
Note line graph used for clarity, and not meant to imply intermediate values exist between the months.

Comparisons with previous years

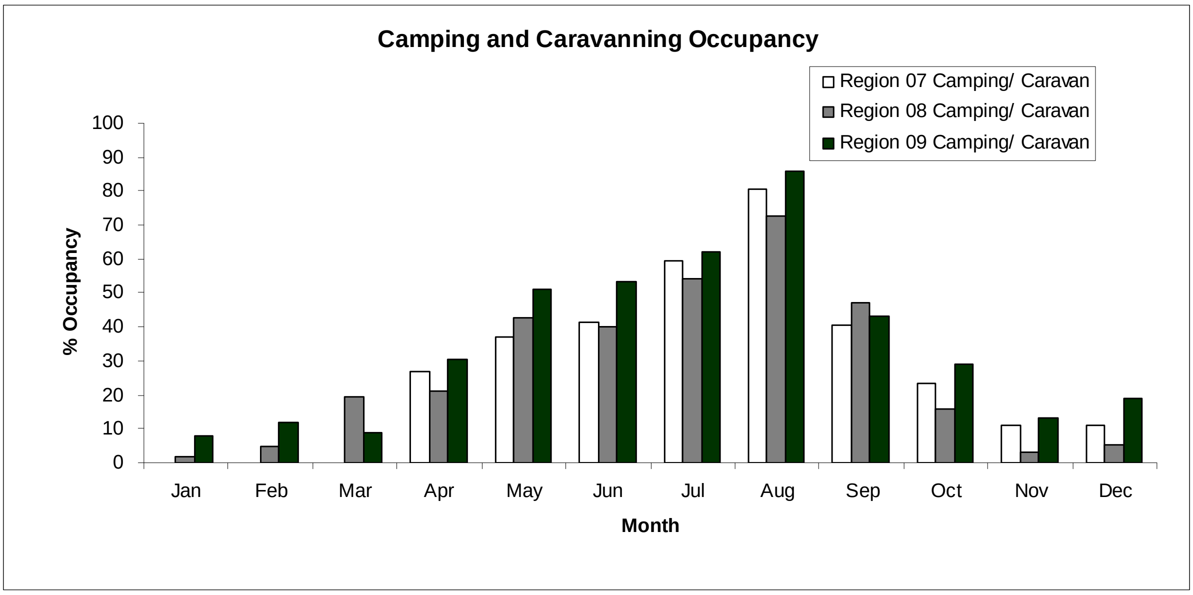
The data from 2007, 2008, and 2009 exhibit a classic saw tooth shape when plotted over time.



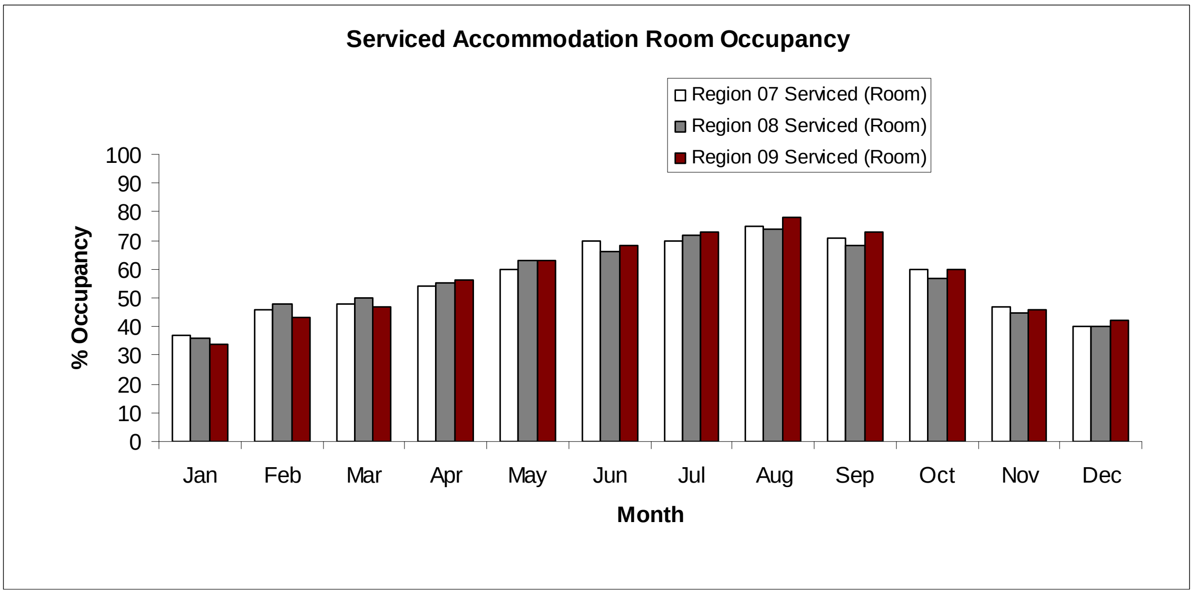
Self-Catering accommodation in 2009 had lower occupancy in Q1 compared to 2007 and 2008. Q2 saw higher occupancy levels than 2007 and 2008, and Q3 levels were below that of 2008. There seems to be a higher April and May occupancy in 2009 than previously encountered and lower summer occupancy than 2008. November and December were below the previous 2 years' occupancy levels.



Camping and Caravanning accommodation in 2009 had higher occupancy in Q1 compared to 2008 (note there was no data for Q1 2007). Q2 saw higher occupancy levels than 2007 and 2008; and Q3 levels were mixed, with August and October performing well. Q4 figures are above the levels for the previous two years. In this case, the timing of occupancy is even more divergent to previous years. However, a low sample size reduces the confidence with which this assertion can be sustained.



Serviced Accommodation in 2009 had lower occupancy in Q1 compared to 2007 and 2008. Q2 saw a mix of levels relative to 2007 and 2008; and Q3 levels were higher than in 2007 and 2008. Q4 was higher than in 2008, and roughly similar to 2007, resulting in a longer shoulder period. The regional average for January 2010 is 35%, which is very slightly above that of 2009 and 2008, but below 2007's.



It should be remembered that regional level analyses can mask considerable variation in county and individual business performance; and that the average position may not be experienced by any individual business. In addition, from our "How's Business?" reports it would appear that secondary spend has reduced.

South West Tourism (SWT)

South West Tourism is the independent strategic regional body for tourism, mainly funded by the South West of England Regional Development Agency.

Role of SWT:

- The leader and voice of tourism at regional level

- To provide intelligence, knowledge, advice, and promote best practice, in business operations, skills, quality and welcome

- The custodian of the regional tourism development strategy and regional tourism development plan

- To provide expert advice and guidance which facilitates wise and targeted investment in tourism infrastructure and development

- By working with “beacon businesses” to support tourism development in the region through T2015 Action Programmes, which tackle pan regional areas of weakness and opportunity

- To facilitate the continuous improvement in how the appeal of the region, the tourism experience themes and its destinations are communicated and promoted to our existing and potential visitors.

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The Regional Tourist Board for the South West of England

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