Warwickshire
County Council

Visitor Accommodation Futures Study
and Development Action Plan

**SUMMARY**

# 1. Introduction

The purpose of this report is to understand the current visitor accommodation stock in the county of Warwickshire, and to identify the likely accommodation demand and trends through to the year 2030.

The report considers major opportunities for the county over the coming decade, primarily the Coventry City of Culture in 2021, the Birmingham Commonwealth games in 2022, and the potential requirements associated with the building of HS2. It takes account of current trends in visitors to the county and predictions for growth through to 2030, including the significant growth in the short term let sector, epitomised by agencies such as Airbnb.

The report details existing accommodation stock in Warwickshire, as well as known new developments in the surrounding area – primarily Coventry, Birmingham and the West Midlands.

Our findings have been informed by surveys of accommodation providers and developers, as well as consultations with local councils. Their views, information on current performance, and existing development plans, are summarised in the main report, along with recommendations on future actions to support accommodation development.

# 2. Market Context

## 2.1 International Context

The importance of the tourism industry has never been greater. UNTWO, the World Tourism Organization, reported 7% growth in worldwide tourism in 2017, with 1,323 million people travelling and spending around $1.6 trillion. This has grown from 400 million travelling in 1990.

## 2.2 National Context

Over the period 2013-19 international tourism arrivals to the UK have grown by 18.7% to 38.8m.



Based on the **Tourism Sector Deal**, presented to the government in October 2017, the sector is in a robust position, growing more quickly and creating jobs faster than any other business sector. It is predicted to grow from a value of £126.9bn in 2017 to £257.4bn in 2025.
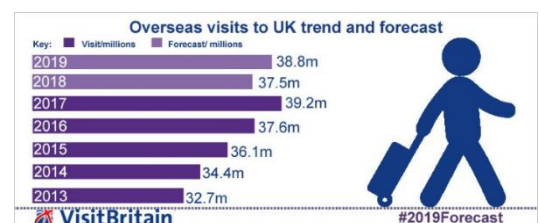
Nationally, overnight arrivals are predicted to grow by 3.6% p.a. from 2016 through to 2025. Similarly, the number of UK tourism jobs is forecast to increase from 3.1m to 3.7m by 2025. Clearly, Brexit remains a key uncertainty and forecasts assume there will be no major disruptions to travel.

## 2.3 Warwickshire Context

It is more difficult to extract meaningful data at a local level as sample sizes are much reduced. Available figures suggest that the level of visitor nights taken in Warwickshire has remained relatively static since 2007 at 2.4 million (based on a three year rolling average). However, there are variances across the County with Stratford-on-Avon District performing relatively better.

# 3. Accommodation Review

## 3.1 Accommodation Distribution across Warwickshire

MAS conducted an in-depth review using web research, STR Global and AirDNA data for all postcodes in Warwickshire, as provided by WCC.

For the purposes of this research we have split accommodation by type, i.e. hotels, guest accommodation (B&Bs, inns and guest houses) and self-catering. Short term let totals, provided by AirDNA, are shown in a separate section. MAS has identified nearly 30% of all Airbnb property is duplicated in other mainstream sales and distribution channels, such as Booking.com.

In total there are some 23,800 bedspaces available in Warwickshire, as shown in the table below.

**Table 1: Accommodation capacity in Warwickshire by type of property, 2018**

| Property Type | No. of Properties | Available Units[1] | Total Capacity[2] |
|---|---|---|---|
| **Hotels** | 153 | 8,424 | 15,842 |
| **Self-Catering** | 311 | 657 | 1,973 |
| **Guest Accommodation** | 251 | 1,526 | 3,937 |
| **Hostel** | 1 | 32 | 134 |
| **Total** | **716** | **10,639** | **21,886** |
| **STL (short term lets) Total** | 856 | 1,554 | 3,187 |
| **STL Duplicates (approx.)** | 282 | 610 | 1,273 |
| **Airbnb Summary** | **574** | **944** | **1,914** |
| **Total with Airbnb** | **1,290** | **11,583** | **23,800** |

## 3.2 Accommodation Distribution by District

### Headline figures:

- Over 60% of all capacity and 75% of all units are in the south of the County (the districts of Stratford-On-Avon and Warwick) as shown below:

**Table 2: Percentage of Total Accommodation in South Warwickshire**

| Guest Accommodation | Hotels | Self-Catering | Airbnb |
|---|---|---|---|
| 73% | 58% | 90% | 88% |

- Warwick DC has the largest number of hotels (37% of properties and nearly 38% of rooms)
- Stratford on Avon DC and Rugby BC have the same number of hotels, but Stratford has 400 more rooms
- Over 70% of all self-catering properties, rooms and capacity are within Stratford-on-Avon DC
- Nuneaton and Bedworth BC only has 5% of all properties, but nearly 11% of all units and capacity.

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[1] Generic term referring to all types of accommodation unit, e.g. bedrooms, self-catering units, caravan pitches, etc
[2] Capacity refers to bedspaces, i.e. the number of guests that can be accommodated if units are fully utilised

**Table 3: Distribution of Accommodation by Local District/Borough**

| Guest Accommodation | North Warks | % | Nuneaton & Bedworth | % | Rugby | % | Stratford on Avon | % | Warwick | % | Total |
|---|---|---|---|---|---|---|---|---|---|---|---|
| **Properties** | 37 | 14.8% | 14 | 5.6% | 17 | 6.8% | 120 | 48.0% | 62 | 24.8% | **250** |
| **Units** | 295 | 19.7% | 77 | 5.2% | 129 | 8.6% | 684 | 45.8% | 309 | 20.7% | **1,494** |
| **Capacity** | 591 | 15.5% | 155 | 4.1% | 261 | 6.9% | 1,414 | 37.2% | 1,382 | 36.3% | **3,803** |

| Hotel | North Warks | % | Nuneaton & Bedworth | % | Rugby | % | Stratford on Avon | % | Warwick | % | Total |
|---|---|---|---|---|---|---|---|---|---|---|---|
| **Properties** | 16 | 10.5% | 16 | 10.5% | 32 | 20.9% | 32 | 20.9% | 57 | 37.3% | **153** |
| **Units** | 1,137 | 13.5% | 1,055 | 12.5% | 1,343 | 15.9% | 1,719 | 20.4% | 3,170 | 37.6% | **8,424** |
| **Capacity** | 2,300 | 14.5% | 2,120 | 13.4% | 2,688 | 17.0% | 3,329 | 21.0% | 5,405 | 34.1% | **15,842** |

| Self-Catering | North Warks | % | Nuneaton & Bedworth | % | Rugby | % | Stratford on Avon | % | Warwick | % | Total |
|---|---|---|---|---|---|---|---|---|---|---|---|
| **Properties** | 12 | 3.9% | 6 | 1.9% | 10 | 3.2% | 226 | 72.7% | 57 | 18.3% | **311** |
| **Units** | 27 | 4.1% | 20 | 3.0% | 22 | 3.3% | 471 | 71.7% | 117 | 17.8% | **657** |
| **Capacity** | 90 | 4.6% | 46 | 2.3% | 56 | 2.8% | 1,455 | 73.7% | 326 | 16.5% | **1,973** |

| Total | North Warks | % | Nuneaton & Bedworth | % | Rugby | % | Stratford on Avon | % | Warwick | % | Total |
|---|---|---|---|---|---|---|---|---|---|---|---|
| **Properties** | 65 | 9.1% | 36 | 5.0% | 59 | 8.3% | 378 | 52.9% | 176 | 24.6% | **714** |
| **Units** | 1,459 | 13.8% | 1,152 | 10.9% | 1,494 | 14.1% | 2,874 | 27.2% | 3,596 | 34.0% | **10,575** |
| **Capacity** | 2,981 | 13.8% | 2,321 | 10.7% | 3,005 | 13.9% | 6,198 | 28.7% | 7,113 | 32.9% | **21,618** |

## 3.3 Self-Catering and Agency Overview

We identified over 20 agencies selling Warwickshire S-C property although many properties appear on multiple sites.

Our research identified 111 self-catering properties in our conventional accommodation list, with an additional 227 properties managed by agencies. After de-duping the list, **there are 311 self-catering properties available in Warwickshire.**

The growth potential is considerable as this does not consider the "platforms", (the booking sites that consider themselves solely as intermediaries, connecting hosts and guests, but who do not own or access any inventory, such as Airbnb, HomeAway or Booking.com). With 55% of all Warwickshire Airbnb properties being homes, this potentially adds **316** more home rentals to the 311 already available, more than doubling the conventional home sector.

## 3.4 The Short-Let Market

The growth of Airbnb has had a remarkable impact on the accommodation sector. In Warwickshire, between 2014 and 2018 Airbnb alone grew from 88 properties to over 1,700 properties, although only 1,153 of these are currently active (March 2019). **This represents over 1,000% increase in 4 years.**

There is a clear imbalance in the distribution of Airbnb properties across the county. Over 50% of the property is in Stratford-on-Avon DC, with a further 35% in Warwick DC.

Concentrations in the local towns include 155 properties in Stratford-upon-Avon, 126 in Royal Leamington Spa, 60 in Warwick, 23 in Kenilworth and 22 in Rugby.

Despite being a major town, Nuneaton only has 12 properties listed.
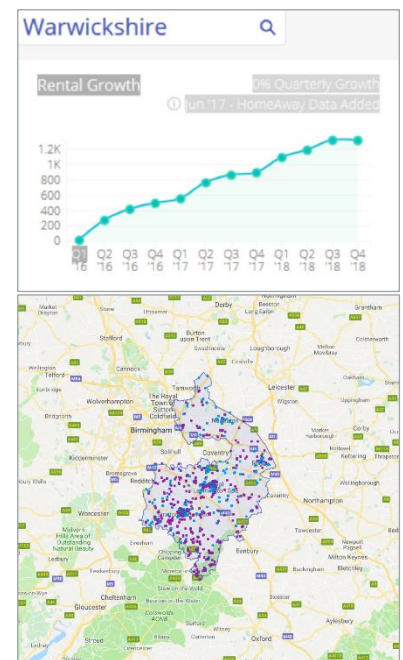
**Table 4: Short Term Let Accommodation Distribution in Warwickshire**

| Individual Districts | Properties | Units | Capacity | % of Properties | % of Units | % of Capacity |
|---|---|---|---|---|---|---|
| North Warwickshire | 25 | 42 | 79 | 2.93% | 2.70% | 2.48% |
| Nuneaton and Bedworth | 24 | 44 | 91 | 2.82% | 2.83% | 2.86% |
| Rugby | 55 | 98 | 210 | 6.46% | 6.31% | 6.59% |
| Stratford on Avon | 453 | 804 | 1,619 | 53.17% | 51.74% | 50.80% |
| Warwick (Leamington Spa) | 295 | 566 | 1,188 | 34.62% | 36.42% | 37.28% |
| TOTAL | 852 | 1,554 | 3,187 | 100.00% | 100.00% | 100.00% |

**M Assessment Services**

# 4. Forward Planning

## 4.1 Accommodation Market Growth Projections to 2030

We have illustrated below three levels of uniform annual growth as determined by two major national and international organisations, UNTWO, the UN's World Tourism Organisation, the Sector Deal as lead by UKHospitality and adopted in Summer 2019 by the government.

- **2% pa** – based on expected UNTWO growth forecasts for Europe (31.9% by 2030)
- **3.5% pa** – based on the level of growth foreseen in the Tourism Sector deal (61.9% by 2030)
- **5% pa** – based on the 2013-18 WCC Visitor Economy Framework and anticipated Coventry City of Culture target growth[3] (98% by 2030)

Additionally, we have used a "Peak +" figure to illustrate potential spikes in demand caused by "major events" such as City of Culture, the Commonwealth Games, and HS2 work. This peak estimate is based on the spike in demand experienced in 2010 at the height of the "staycation".

The table below shows daily peak[4] room night requirements for Warwickshire based on current VisitBritain Insights figures for all types of visit.

All growth is based on annual compound percentage growth.

**Table 5: Warwickshire Room Growth Summary based on VisitBritain Insights, 2016**

| Warwickshire | | Room Nights | | | | Peak + | Available | Diff | Diff | Diff | Diff |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | Growth | 2016 | 2020 | 2025 | 2030 | 2030+ | 2019 | 2020 | 2025 | 2030 | 2030+ |
| Daily Peak Requirements (All) | 2% | 5,039 | 5,454 | 5,563 | 5,675 | 8,527 | 10,608 | 5,154 | 5,045 | 4,933 | 2,081 |
| | 3.50% | 5,039 | 5,783 | 6,868 | 8,157 | 11,818 | 10,608 | 4,825 | 3,740 | 2,451 | -1,210 |
| | 5% | 5,039 | 6,125 | 7,817 | 9,977 | 15,226 | 10,608 | 4,483 | 2,791 | 631 | -4,618 |

It is tempting to conclude that growth in demand for accommodation at between 2% and 5% could be satisfied by existing capacity and thus improve stock utilisation, occupancy and business revenue.

Whilst this may be desirable, such an analysis ignores the reality that different markets require different types of accommodation and business will go elsewhere if this is not available. It would be prudent to plan for supply to grow in line with the demand projections indicated. Indeed, if the "Peak +" figure is used, the table projects an actual shortfall in stock of over 4,600 units.

## 4.2 The Impact of Major Events

The actual impact of "major events" is difficult to predict. At the time of writing, the results of the Coventry City of Culture accommodation study have yet to be published and we recommend their projected impacts inform these Warwickshire forecasts moving forward. In our opinion, the Commonwealth Games requirement of an additional 7,500 rooms per night falls comfortably within existing and projected room stock for the region.

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[3] Subject to review, and to be informed by the forthcoming Coventry City of Culture accommodation study
[4] Peak figures are based on Shakespeare's England Economic Impact Survey data which reveals that the month of August attracts the highest level of overnights - 9.4% of annual overnights

In respect of HS2 works, contractor feedback suggests some 2,000 staff may be based in Warwickshire at any one time, mainly in the north and east of the County. Higher demand may well impact on prices. However, the availability of accommodation in Coventry and the wider region is likely to disperse demand.

## 4.3 Planned Development in Warwickshire

Of the 13 hotel developments and 568 units planned for Warwickshire, 154 units are at the Dallas Burton Polo fields near Southam and 180 units are for the Heritage Motor Museum, although planning permission here appears to be deferred. A further 60 are at the new Moreton Hall Hotel school under development. As such, 400 of the 568 units under development currently fall into just 3 locations, and all of them are in the south of the county.

**Table 6: Known Hotel Planning Permissions in Warwickshire, March 2019**

| Region | Warwickshire | Central Birmingham | Solihull | BHX Airport | Coventry | East Leicestershire | Total |
|---|---|---|---|---|---|---|---|
| **Developments** | 13 | 34 | 11 | 2 | 7 | 2 | **69** |
| **Units** | 568 | 4,122 | 612 | 279 | 580 | 80 | **6,241** |
| **Known Opening Date Units** | X | - | - | - | - | x | - |
| **2019** | - | 100 | 127 | 224 | 120 | - | **571** |
| **2020** | - | 509 | - | - | - | - | **509** |
| **2025** | - | 245 | - | - | - | - | **245** |

## 4.4 Local Development Plans

We have summarised several key local development opportunities and issues below:

### 4.4.1 Stratford-on-Avon District

- Developments at i) Gateway Quarter and ii) Canal Quarter
- Potential short-term sites include: i) Stratford Picture House ii) BHS Site Bridge Street
- Outside the town a possible hotel opportunity may exist at Quinton Technology Park to support both the businesses and local residential development and the University of Warwick campus at Wellesbourne.
- Current concerns are:
  o Not enough rooms to service demand for "coach tour" rates
  o Need for more caravan pitches and storage
  o Need for a conference venue
  o Potential for a 5 star hotel
  o Promotion of moorings and marinas.

### 4.4.2 North Warwickshire District

- No specific reference to C1 accommodation. Local pressure for housing has often meant that approved tourist accommodation has subsequently become full residential use
- Currently there is a plan for a hotel as part of the MIRA technology park site and an expansion around the Bassets Pole Canal Basin

### 4.4.3 Rugby Borough

- With two thirds of Rugby Borough within greenbelt land, any proposals within the greenbelt would have to demonstrate 'exceptional circumstances', in line with the NPPF
- Development will be directed within the Rugby Urban Area as this is the most sustainable location within the Borough. Rugby is keen to develop its tourism offer in line with its emerging Town Centre Spatial Strategy
- The Council is aware of several vacant/under-used town centre sites which have been subject to previous market interest, including one with previous hotel planning approval
- RBC's Property Team is investigating the redevelopment potential of the Town Hall site
- Smaller planning approvals throughout the rural area for visitor accommodation include 18 lodges near to Draycote Water and 6 glamping tents in Harborough Magna.

### 4.4.4 Nuneaton and Bedworth Borough

- The Council is keen to support visitor accommodation development within the new Borough Plan when approved
- There are specific sites that would be ideal for hotel or visitor accommodation development within the town centre (Transforming Nuneaton opportunities), including Abbey Street, Church Street and Vicarage Street
- Planning consideration for a 21 bedroom hotel (class C1 use), with a manager's apartment over an existing café in the town, plus development at a marina.

### 4.4.5 Warwick District

- New or extended hotels will be permitted in the town centres in accordance with the town centre policies
- WDC will work with the operators of the Racecourse and other stakeholders (including Historic England) to bring forward a masterplan for the area that: "…restricts uses to those associated with visitor accommodation, recreation, leisure and horse racing".

# 5. Conclusions and Action Plan

## 5.1 Planning for Growth

As highlighted above, there are currently 716 properties with 10,600 units in Warwickshire offering accommodation to nearly 22,000 people per night.  Our analysis concludes that it would be prudent to plan for growth in capacity of 2% – 5% pa to 2030, in line with the forecast growth in demand. Consideration should also be given to accommodating peaks in demand over this period.

It will be important to ensure the right kind of accommodation mix.  Specifically, we believe there is a business case for investment in:

- Hotel capacity for the leisure market offering competitive group rates, especially in South Warwickshire, to service the demand of the international holiday coach sector.  Currently, hotels that can offer group rates at a budget / 3* rate on a regular basis are not available.
- Hotel development in North Warwickshire for a property of a similar specification but to accommodate the business traveller, particularly the growing distribution industry located in that area. This may also help service short-term demand for HS2 staff accommodation through until 2026.
- 5-Star hotel:  This report identifies that a 5-star operation would be supported by demand in South Warwickshire. The presence of luxury car brands and high profile motor racing teams would indicate a demand for the equivalent level of hotel for board members, investors, key customers and senior level visitors or meeting requirements. The proximity of the NEC, the Genting Arena and Birmingham Airport would provide a feeder market for such a property.
- It should also be recognised, as in section 4.3, that local competing counties on the Warwickshire border have extensive accommodation plans well under way.

All the local council plans clearly support accommodation development and the visitor economy, with strong references to rural tourism (in keeping with sustainable rural development principles advocated in the National Planning Policy Framework).  However, despite being positively recognised, accommodation development is generally not prioritised nor specifically supported.
If demand for visitor accommodation increases in line with the highest projections set out above, this will need to be proactively addressed.

## 5.2 Key Considerations

Our report has highlighted several issues which should influence future action planning:

- **Targeted promotion of C1 development**.  (the planning site designator for hotels, boarding houses, guest houses) For example, the Coventry and Warwickshire LEP promoted 27 sites within the region at the annual MIPIM conference this year, but there is no specific promotion of C1 Hotel development.
- **Adequate provision for staff accommodation**. Hotels, especially those in rural locations, often provide staff annexes, or local Houses of Multiple Occupancy (HMO), and this should be encouraged or given consideration by planning departments.
- **Grey recruitment**.  The County's demographic is getting older.  Employers should consider flexible recruitment policies that attract semi- or fully-retired employees to fill vacant positions
- **Disability and an ageing population.** With 1 in 5 UK residents now being considered as having a disability and with nearly 40 out of 100 UK residents aged over 65 by 2020,  hotel developers and accommodation providers need to consider the facilities and services that are required, including guest information and staff training.

- **Personal security.** The need to ensure guest safety will become an even more important element of an accommodation provider's future policies, as the number of solo travellers increases, and to ensure the wellbeing of those who are most vulnerable.

## 5.3 Development Trends

Future planning must take account of current and forecast trends set out in the full report, viz:

- **The desire for "EXPERIENCE"**: The glamping solution is part of a wider trend to satisfy the consumer's desire for new experiences, defined by VisitBritain as the **Pursuit of Real** – genuine, authentic tourism products – and **The Leisure Upgrade** - skill-seeking future travellers will prefer tourism products that "combine fun and an opportunity for learning or self-improvement"

- **Key Accommodation Trends**. These include:

  o The reinvention of the Country House Hotel as a haven of contemporary design – the "chintz and frills" are gone, leaving cool, clean designs
  o Self-catering cottages that eschew "old fashioned" but emphasise the history of the building
  o More facilities for active guests, e.g. Cycling/hiking cleaning & drying facilities
  o Larger cottages (sleeping more than 10) are also increasing in popularity, offering great value for money for "3 generation" holidays
  o Bunkhouses have also enjoyed a major make-over, be they rural or city based. Backpackers no longer want basic and impersonal. Dormitories now have personal space, and public spaces are relaxing havens, with the obligatory high speed wi-fi.
  o The food experience is reflected in the rise of the "Gastro Pub" or "Restaurant with Rooms". Historical inns and restaurants with great food with no concerns around drinking and driving make for the perfect retreat
  o Glamping has been growing in popularity over the last 10 years. More solid structures are offering the weatherproofing required to extend the seasonality of being in nature and a raft of new experiences are being offered.

- **Short Term Lets**. In Warwickshire, Airbnb properties have grown from 88 in 2014 to 1,700 in 2018. Similarly, the growth in the serviced apartment sector across Europe continues to outpace that of traditional hotels with 23,600 additional apartments due to be added to the inventory by 2022.

## 5.4 Summary

### 5.4.1 Future Room Requirements

Based on current evidence (Table 5 repeated below) just over 5,000 rooms per night are being occupied, as of 2016 figures. At the 5% growth prediction, and allowing for peaks in demand, by 2030+ we will require around an additional 4,600 rooms per night, across all accommodation types (roughly 450 new rooms created per year).

This would mean increasing the existing level of the 10,600 rooms available to a room stock of approximately 15,000 per night.

However, without peaks in demand and with growth at 2%-3.5%, requirements are reduced, and even at the 5% growth figure there would still be capacity in the market.

**Table 5: Warwickshire Room Growth Summary based on VisitBritain Insights, 2016**

| Warwickshire | | Room Nights | | | | Peak + | Available | Diff | Diff | Diff | Diff |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | Growth | 2016 | 2020 | 2025 | 2030 | 2030+ | 2019 | 2020 | 2025 | 2030 | 2030+ |
| Daily Peak Requirements (All) | 2% | 5,039 | 5,454 | 5,563 | 5,675 | 8,527 | 10,608 | 5,154 | 5,045 | 4,933 | 2,081 |
| | 3.50% | 5,039 | 5,783 | 6,868 | 8,157 | 11,818 | 10,608 | 4,825 | 3,740 | 2,451 | -1,210 |
| | 5% | 5,039 | 6,125 | 7,817 | 9,977 | 15,226 | 10,608 | 4,483 | 2,791 | 631 | -4,618 |

As at April 2019, Warwickshire has less planning permission for accommodation development than other regional destinations (see Table 6): 13 developments for 568 rooms.

Capacity and growth research should be maintained over the coming years.

### 5.4.2 The Impact of Major Events

We recommend the projected impacts of the ongoing Coventry 2021 accommodation study inform the conclusions of this report.

We believe the Commonwealth Games requirement of an additional 7,500 rooms falls comfortably within existing and projected room stock for the region.

The impact of HS2 workers is forecast to generate demand for between 900 and 1,250 rooms per night, but existing regional supply should be enough to cover this.

## 5.5 Action Plan

### 5.5.1 Engaging Developers

It is clear from the difficulty in engaging with developers in the opinion surveys conducted that a specific programme of actions is required.

- Further work should be undertaken to develop relationships locally, regionally and across the UK with developers, major hotel brands and financiers. This work should commence immediately to ensure development will take place over the next ten years.

- The CWLEP should be approached to expand their support of development investment at MIPIM, to include IHIF – the International Hotel Investment Forum. Attendance would need to be a long-term commitment, of at least 5 years, to develop suitable relationships and ensure the investment is sustainable through the 10 years and beyond.

### 5.5.2 Improving Planning

The current local council plans support visitor accommodation development without offering specific solutions.

- It is recommended that Councils include a specific reference to C1 planning development for visitor accommodation in local plans.

- Discussions should be undertaken, to bring together the CWLEP and the developers of the sites highlighted in the MIPIM document to discuss visitor accommodation development.

- C1 hotel developments should be included in the Stratford on Avon Gateway and Canal Quarter developments, the Leamington Creative Quarter, the Transforming Nuneaton programme, the Rugby Barn Hall refurbishment and at the MIRA site in North Warwickshire.

- Additional potential sites need to be identified. Local council strategy may need to be reviewed to support this, guided by the DCLG Good Practice Guide for Tourism Planning.

- A proactive plan to support rural and farm diversification for visitor accommodation development should be encouraged across the county in line with the National Planning Policy Framework, especially in north Warwickshire.

- A plan to encourage overnights by active/younger/less affluent visitors should be considered. Solutions might include simple but stylish town-based hostels and well-designed rural bunkhouses with facilities to support walking/cycling/activity holidays.

### 5.5.3 Encouraging Best Practice

We recommend Council partners and accommodation operators develop policies and practice which embrace best practice and can be used as a marketing tool. Opportunities include:

- **Accessibility**

  An opportunity exists to be a market leader in meeting the needs of older and less able visitors. This is largely about education and much of the action required is straightforward, easy to implement, and low cost.

**M Assessment** **Services**

A training programme and a small match fund programme could be created, possibly in partnership with the CWLEP.

An excellent rail network, and promotional fares for seniors, provides an opportunity to position Warwickshire as a market leader.

- **Older Employees**

A policy should be considered to encourage more mature workers into the hospitality sector across the county.

- **Quality and Legal Compliance**

Customer safety and protection is paramount. Councils should consider how they can promote compliance, adopting best practice from elsewhere (e.g. Cornwall Council has Primary Authority with Quality in Tourism to deliver quality compliance measures).

With the rise of the short-term let market, many new owners do not understand the basic legal and insurance requirements. They should be encouraged to adopt a minimum standard as laid out by the Short Term Accommodation Association (STAA) in order to protect their guests. Warwick DC is already actively considering this.

- **Planning and Tourism Team Support**

Consideration should be given to supporting planning applications by offering dedicated team support. Guidance from local planning and tourism officers would assist and advise on potential development and iron out problems early in the process.