



Visitor Accommodation Futures Study  
and Development Action Plan

**APPENDIX**

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Appendix 1: Regional Comparisons

Source: VisitBritain

	Total Trips 2007	Total Trips 2012	Total Trips 2016	% Change vs 2007	Holiday Trips 2007	Holiday Trips 2012	Holiday Trips 2016	% Change vs 2007	Total Nights 2007	Total Nights 2012	Total Nights 2016	% Change vs 2007	Holiday Nights 2007	Holiday Nights 2012	Holiday Nights 2016	% Change vs 2007	Total Spend 2007	Total Spend 2012	Total Spend 2016	% Change vs 2007	Holiday Spend 2007	Holiday Spend 2012	Holiday Spend 2016	% Change vs 2007
	thousands	thousands	thousands		thousands	thousands	thousands		thousands	thousands	thousands		thousands	thousands	thousands		millions	millions	millions		millions	millions	millions	
Birmingham	2279	2349	2409	5.69%	475	595	572	20.38%	5372	4835	5190	-3.38%	923	1009	1063	15.20%	378	381	428	13.32%	90	116	117	30.37%
Coventry	544	590	523	-3.86%	113	155	99	-12.68%	1261	1282	1149	-8.91%	240	307	244	1.53%	72	84	76	5.56%	17	25	21	23.53%
Solihull	124	172	245	97.85%	4	15	77	1816.67%	225	494	459	104.15%	9	38	103	1040.74%	14	23	44	214.29%	-	3	18	#VALUE!
<b>West Midlands</b>	<b>3540</b>	<b>3560</b>	<b>3569</b>	<b>0.83%</b>	<b>710</b>	<b>848</b>	<b>810</b>	<b>14.04%</b>	<b>8249</b>	<b>7746</b>	<b>7614</b>	<b>-7.69%</b>	<b>1423</b>	<b>1542</b>	<b>1561</b>	<b>9.70%</b>	<b>523</b>	<b>541</b>	<b>589</b>	<b>12.68%</b>	<b>121</b>	<b>155</b>	<b>164</b>	<b>35.81%</b>
<b>West Yorkshire</b>	<b>2634</b>	<b>2818</b>	<b>2578</b>	<b>-2.13%</b>	<b>570</b>	<b>779</b>	<b>681</b>	<b>19.42%</b>	<b>6645</b>	<b>6282</b>	<b>6108</b>	<b>-8.08%</b>	<b>1265</b>	<b>1657</b>	<b>1640</b>	<b>29.67%</b>	<b>368</b>	<b>415</b>	<b>426</b>	<b>15.85%</b>	<b>94</b>	<b>140</b>	<b>142</b>	<b>50.71%</b>
Derbyshire	1756	1878	1601	-8.83%	787	825	816	3.73%	4790	4683	4364	-8.89%	2359	2258	2434	3.17%	214	268	249	16.51%	106	150	156	47.48%
Cotswold	325	343	389	19.69%	128	214	240	87.76%	885	1060	1056	19.36%	390	725	645	65.30%	44	64	87	98.48%	28	49	63	126.19%
<b>Worcestershire, County of</b>	<b>859</b>	<b>971</b>	<b>894</b>	<b>4.11%</b>	<b>289</b>	<b>338</b>	<b>376</b>	<b>30.10%</b>	<b>1984</b>	<b>2375</b>	<b>2238</b>	<b>12.82%</b>	<b>744</b>	<b>879</b>	<b>994</b>	<b>33.60%</b>	<b>97</b>	<b>114</b>	<b>127</b>	<b>30.93%</b>	<b>43</b>	<b>51</b>	<b>65</b>	<b>51.16%</b>
Cherwell (north Oxon)	264	275	372	40.78%	92	73	121	31.88%	581	696	838	44.23%	202	169	299	47.85%	30	38	64	114.44%	10	14	33	233.33%
Oxford	649	629	621	-4.37%	166	249	175	5.22%	1649	1309	1238	-24.90%	362	560	365	0.74%	92	116	93	1.45%	35	60	31	-10.48%
South Oxfordshire	230	290	275	19.71%	59	67	106	79.10%	668	623	744	11.38%	196	179	321	63.78%	30	38	32	5.96%	11	13	17	51.52%
West Oxfordshire	286	249	212	-25.99%	122	104	86	-27.87%	826	662	516	-37.49%	355	279	219	-38.22%	37	37	39	5.41%	21	22	21	-1.59%
<b>Oxfordshire</b>	<b>1522</b>	<b>1589</b>	<b>1632</b>	<b>7.21%</b>	<b>453</b>	<b>519</b>	<b>535</b>	<b>18.18%</b>	<b>3961</b>	<b>3624</b>	<b>3761</b>	<b>-5.05%</b>	<b>1161</b>	<b>1253</b>	<b>1339</b>	<b>15.36%</b>	<b>197</b>	<b>244</b>	<b>247</b>	<b>25.38%</b>	<b>80</b>	<b>113</b>	<b>110</b>	<b>37.50%</b>
<b>Warwickshire</b>	<b>1082</b>	<b>1203</b>	<b>1090</b>	<b>0.71%</b>	<b>447</b>	<b>501</b>	<b>448</b>	<b>0.22%</b>	<b>2582</b>	<b>2727</b>	<b>2410</b>	<b>-6.67%</b>	<b>1094</b>	<b>1152</b>	<b>1033</b>	<b>-5.61%</b>	<b>171</b>	<b>179</b>	<b>181</b>	<b>6.04%</b>	<b>87</b>	<b>90</b>	<b>93</b>	<b>6.51%</b>

## Appendix Section 2

## Warwickshire Overall Visitor Nights, Trips and Spend

### Trips

3 Year rolling averages	Total Trips	Total Trips	Total Trips	Total Trips	Total Trips	Total Trips	Total Trips	Total Trips	Total Trips	Total Trips	% Inc
	2006-8	2007-9	2008-10	2009-11	2010-12	2011-13	2012-14	2013-15	2014-16*	2015-17*	07 - 16
	thousands	thousands	thousands	thousands	thousands	thousands	thousands	thousands	thousands	thousands	
<i>England</i>	98265	98724	97516	100682	101418	103500	99604	99028	98228	102078	3.88%
North Warwickshire	31	24	15	9	51	61	43	44	42	45	45.16%
Nuneaton and Bedworth	102	88	108	106	63	53	61	70	54	49	-51.96%
Rugby	129	122	136	188	214	218	152	137	153	156	20.67%
Stratford-on-Avon	468	480	470	494	550	524	499	473	556	553	18.16%
Warwick	345	371	405	396	303	347	408	387	336	292	-15.36%
<b>Warwickshire</b>	<b>1082</b>	<b>1088</b>	<b>1138</b>	<b>1200</b>	<b>1181</b>	<b>1203</b>	<b>1171</b>	<b>1119</b>	<b>1137</b>	<b>1090</b>	<b>0.71%</b>

3 Year rolling averages	Holiday Trips	Holiday Trips	Holiday Trips	Holiday Trips	Holiday Trips	Holiday Trips	Holiday Trips	Holiday Trips	Holiday Trips	Holiday Trips	% Inc
	2006-8	2007-9	2008-10	2009-11	2010-12	2011-13	2012-14	2013-15	2014-16*	2015-17*	07 - 16
	thousands	thousands	thousands	thousands	thousands	thousands	thousands	thousands	thousands	thousands	
<i>England</i>	40471	42675	43435	45570	45231	45692	43883	43127	43057	45779	
North Warwickshire	11	11	7	-	17	29	25	12	8	11	-3.03%
Nuneaton and Bedworth	28	19	28	34	8	13	8	10	6	7	-75.00%
Rugby	18	13	17	22	28	33	30	30	40	39	116.67%
Stratford-on-Avon	260	263	250	249	291	289	269	251	287	317	21.92%
Warwick	124	116	120	106	86	138	161	157	87	78	-36.83%
<b>Warwickshire</b>	<b>447</b>	<b>424</b>	<b>422</b>	<b>415</b>	<b>429</b>	<b>501</b>	<b>496</b>	<b>463</b>	<b>426</b>	<b>448</b>	<b>0.22%</b>

## Nights

	Total	Total	Total	Total	Total	Total	Total	Total	Total	Total	% Inc
	Nights	Nights	Nights	Nights	Nights	Nights	Nights	Nights	Nights	Nights	
	2006-8	2007-9	2008-10	2009-11	2010-12	2011-13	2012-14	2013-15	2014-16*	2015-17*	
3 Year rolling averages	thousands	thousands	thousands	thousands	thousands	thousands	thousands	thousands	thousands	thousands	
	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	07 - 16
<i>England</i>	301.044	302.767	296.377	300.915	300.922	304.912	293.391	289.85	286.71	295.56	-1.82%
North Warwickshire	78	48	32	17	103	153	122	121	80	101	29.06%
Nuneaton and Bedworth	216	186	257	217	149	105	152	165	125	91	-57.87%
Rugby	290	335	296	371	453	527	482	410	433	391	34.94%
Stratford-on-Avon	1152	1209	1060	1192	1338	1255	1228	1135	1335	1272	10.45%
Warwick	820	870	1033	923	646	687	823	731	648	544	-33.62%
<b>Warwickshire</b>	<b>2582</b>	<b>2654</b>	<b>2696</b>	<b>2744</b>	<b>2689</b>	<b>2727</b>	<b>2814</b>	<b>2569</b>	<b>2626</b>	<b>2410</b>	<b>-6.67%</b>
	Holiday	Holiday	Holiday	Holiday	Holiday	Holiday	Holiday	Holiday	Holiday	Holiday	% Inc
	Nights	Nights	Nights	Nights	Nights	Nights	Nights	Nights	Nights	Nights	
	2006-8	2007-9	2008-10	2009-11	2010-12	2011-13	2012-14	2013-15	2014-16*	2015-17*	
	thousands	thousands	thousands	thousands	thousands	thousands	thousands	thousands	thousands	thousands	
	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	07 - 16
<i>England</i>	146	153.809	154.017	159.399	155.309	154.639	147.74	144.492	143.635	150.46	3.05%
North Warwickshire	26	26	15	-	31	69	64	38	21	23	-10.26%
Nuneaton and Bedworth	50	41	60	70	14	22	16	23	20	21	-58.00%
Rugby	25	73	80	82	38	74	104	109	125	112	349.33%
Stratford-on-Avon	622	711	638	713	799	698	644	557	679	743	19.45%
Warwick	345	301	384	302	227	289	317	277	157	132	-61.64%
<b>Warwickshire</b>	<b>1094</b>	<b>1160</b>	<b>1178</b>	<b>1173</b>	<b>1109</b>	<b>1152</b>	<b>1147</b>	<b>1005</b>	<b>1003</b>	<b>1033</b>	<b>-5.61%</b>

## Spend

3 year rolling averages	Total Spend	Total Spend	Total Spend	Total Spend	Total Spend	Total Spend	Total Spend	Total Spend	Total Spend	Total Spend	% Inc
	2006-8	2007-9	2008-10	2009-11	2010-12	2011-13	2012-14	2013-15	2014-16*	2015-17*	
	millions	millions	millions	millions	millions	millions	millions	millions	millions	millions	
	<b>2007</b>	<b>2008</b>	<b>2009</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>07 - 16</b>
<i>England</i>	16.044	16.414	16.314	16.924	17.751	18.707	18.763	18.788	18.765	19.086	18.96%
North Warwickshire	5	4	3	2	5	8	5	5	2	4	-20.00%
Nuneaton and Bedworth	11	10	11	9	5	4	5	7	6	6	-48.48%
Rugby	16	18	13	16	17	19	17	17	20	21	33.33%
Stratford-on-Avon	82	80	81	83	100	96	98	109	115	111	35.37%
Warwick	57	58	68	57	42	52	55	51	40	42	-26.90%
<b>Warwickshire</b>	<b>171</b>	<b>170</b>	<b>177</b>	<b>167</b>	<b>168</b>	<b>179</b>	<b>182</b>	<b>190</b>	<b>181</b>	<b>181</b>	6.04%
	Holiday Spend	Holiday Spend	Holiday Spend	Holiday Spend	Holiday Spend	Holiday Spend	Holiday Spend	Holiday Spend	Holiday Spend	Holiday Spend	% Inc
	2006-8	2007-9	2008-10	2009-11	2010-12	2011-13	2012-14	2013-15	2014-16*	2015-17*	
	millions	millions	millions	millions	millions	millions	millions	millions	millions	millions	
	<b>2007</b>	<b>2008</b>	<b>2009</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>07 - 16</b>
<i>England</i>	8.387	8.89	9.055	9.573	10.037	10.5	10.505	10.411	10.4263	10.752	28.20%
North Warwickshire	2	2	2	-	1	2	2	1	-	1	-66.67%
Nuneaton and Bedworth	5	4	4	2	1	1	1	1	1	1	-73.33%
Rugby	3	3	2	2	3	3	4	5	10	11	266.67%
Stratford-on-Avon	53	51	53	53	70	64	59	62	64	70	32.70%
Warwick	24	19	27	23	15	19	23	21	12	11	-54.17%
<b>Warwickshire</b>	<b>87</b>	<b>78</b>	<b>88</b>	<b>81</b>	<b>90</b>	<b>90</b>	<b>88</b>	<b>89</b>	<b>86</b>	<b>93</b>	6.51%

## Appendix Section 3

### AirDNA summary Warwickshire and Area

	Mar-19	Active Properties	%	Hosts	Av props / host	ADR	Occ. Nov %	Nov. Revenue	Homes %	Total # Homes	Total 2014	Total 2018	% Increase: Growth '18/'14
Warwickshire		987	11%	644	1.53	£88	48	£944	55	354	88	1,731	1867%
Coventry		390	4%	214	1.82	£82	48	£1,064	30	64	28	1,251	4368%
Solihull		212	2%	140	1.51	£90	44	£723	42	59	20	342	1610%
Birmingham		1,530	18%	834	1.83	£80	52	£1,030	51	425	129	3,987	2991%
Derbyshire		1,532	18%	898	1.71	£93	42	£1,011	72	647	103	2,202	2038%
Leicestershire (ex City)		509	6%	329	1.55	£80	46	£840	42	138	52	990	1804%
Northants		961	11%	631	1.52	£85	55	£1,020	41	259	61	1,611	2541%
Cherwell (Nth Oxon)		420	5%	262	1.60	£100	42	£856	45	118	35	759	2069%
West Oxfordshire		541	6%	318	1.70	£126	31	£947	73	232	46	927	1915%
Cotswolds		1,382	16%	681	2.03	£145	29	£1,050	84	572	94	2,054	2085%
Wychavon (E Worcs)		257	3%	183	1.40	£99	35	£1,001	68	124	26	403	1450%
<b>TOTAL</b>		<b>8,721</b>	<b>100%</b>	<b>5,134</b>							<b>682</b>	<b>16,257</b>	

Individual Districts	Properties	Units	Capacity	% of Properties	% of Units	% of Capacity	Source AirDNA
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	1619	53.17%	51.74%	50.80%	
Warwick (Leamington Spa)	295	566	1188	34.62%	36.42%	37.28%	
<b>TOTAL</b>	<b>852</b>	<b>1,554</b>	<b>3187</b>	<b>100.00%</b>	<b>100.00%</b>	<b>100.00%</b>	

## Appendix Section 4:1

## Warwickshire Room Growth Summary based on 2016 insights

Warwickshire	Room nights					Peak +	Available	Diff.	Diff.	Diff.	Diff.
Daily	Growth	2016	2020	2025	2030	2030	2019	2020	2025	2030	2030 +
Peak	2%	5,039	5,454	5,563	5,675	8,527	10,608	5,154	5,045	4,933	2,081
Requirements	3.50%	5,039	5,783	6,868	8,157	11,818	10,608	4,825	3,740	2,451	-1,210
All	5%	5,039	6,125	7,817	9,977	15,226	10,608	4,483	2,791	631	-4,618
Warwickshire	Room Nights					Peak +	Available	Diff.	Diff.	Diff.	Diff.
Daily	Growth	2016	2020	2025	2030	2030	2019	2020	2025	2030	2030 +
Peak	2%	2,159	2,337	2,384	2,432	3,645	10,608	8,271	8,224	8,176	6,963
Requirements	3.50%	2,159	2,478	2,943	3,496	5,052	10,608	8,130	7,665	7,112	5,556
Holiday	5%	2,159	2,625	3,350	4,276	5,493	10,608	7,983	7,258	6,332	5,115

2030 + figures are derived from maximum occupancy levels experienced in 2010, and extrapolated from that year





**Appendix Section 4:3 Accommodation Growth predictions at 3.5%**

<b>All Trips</b> 000's	Increase at 3.5%														Total Increase
	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	
<b>England</b>	1057	1093	1132	1171	1212	1255	1299	1344	1391	1440	1490	1542	1596	1652	61.9%
North Warwickshire	47	48	50	52	53	55	57	59	61	63	66	68	70	73	61.9%
Nuneaton and Bedworth	51	52	54	56	58	60	62	65	67	69	72	74	77	79	61.9%
Rugby	161	167	173	179	185	191	198	205	212	220	227	235	243	252	61.9%
Stratford-on-Avon	572	592	613	635	657	680	704	728	754	780	807	836	865	895	61.9%
Warwick	302	313	324	335	347	359	372	385	398	412	426	441	457	473	61.9%
<b>Warwickshire</b>	1128	1167	1208	1250	1294	1339	1386	1435	1485	1537	1591	1647	1704	1764	61.9%

<b>Holiday Trips</b> 000's	Increase at 3.5%														Total Increase
	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	
<b>England</b>	47	49	51	53	54	56	58	60	62	65	67	69	72	74	61.9%
North Warwickshire	11	11	12	12	13	13	14	14	15	15	16	16	17	17	61.9%
Nuneaton and Bedworth	7	7	8	8	8	9	9	10	10	10	11	11	11	11	61.9%
Rugby	40	42	43	45	46	48	50	51	53	55	57	59	61	63	61.9%
Stratford-on-Avon	328	340	351	364	376	390	403	417	432	447	463	479	496	513	61.9%
Warwick	81	84	87	90	93	96	100	103	107	110	114	118	123	127	61.9%
<b>Warwickshire</b>	464	480	497	514	532	551	570	590	611	632	654	677	701	725	61.9%

**Appendix Section 4:3 Accommodation Growth predictions at 3.5%**

<b>All Nights</b> 000's	Increase at 3.5%														Total Increase
	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	
<b>England</b>	306	317	328	339	351	363	376	389	403	417	432	447	462	478	61.9%
North Warwickshire	104	108	112	116	120	124	128	133	137	142	147	152	157	163	61.9%
Nuneaton and Bedworth	94	97	101	104	108	112	116	120	124	128	133	138	142	147	61.9%
Rugby	405	419	434	449	465	481	498	515	533	552	571	591	612	633	61.9%
Stratford-on-Avon	1317	1363	1411	1460	1511	1564	1619	1675	1734	1795	1858	1923	1990	2060	61.9%
Warwick	563	583	604	625	646	669	693	717	742	768	795	823	851	881	61.9%
<b>Warwickshire</b>	2494	2581	2672	2765	2862	2962	3066	3173	3284	3399	3518	3641	3769	3901	61.9%
Warks from peak performance	3613.324	3739.79	3870.683	4006.157	4146.372	4291.495	4441.698	4597.157	4758.058	4924.59	5096.95	5275.344	5459.981	5651.08	67.5%

<b>All Nights</b> 000's <i>(England 100,000's)</i>	Increase at 3.5%														Total Increase
	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	
<b>England (100,000's)</b>	156	161	167	173	179	185	191	198	205	212	220	227	235	244	61.9%
North Warwickshire	24	25	26	27	28	29	30	31	32	33	34	35	36	38	61.9%
Nuneaton and Bedworth	22	22	23	24	25	26	27	28	29	30	31	32	33	34	61.9%
Rugby	116	120	125	129	133	138	143	148	153	158	164	170	176	182	61.9%
Stratford-on-Avon	769	796	824	853	882	913	945	978	1013	1048	1085	1123	1162	1203	61.9%
Warwick	137	142	147	152	157	163	168	174	180	187	193	200	207	214	61.9%
<b>Warwickshire</b>	1069	1106	1145	1185	1226	1269	1314	1360	1407	1457	1508	1560	1615	1672	61.9%
Warks from Peak performance	1544.617	1598.679	1654.632	1712.544	1772.484	1834.52	1898.729	1965.184	2033.966	2105.154	2178.835	2255.094	2334.022	2415.713	67.5%

**Appendix Section 4:3 Accommodation Growth predictions at 3.5% Spend**

<b>All Spend</b> millions	Increase at 3.5%														Total Increase
	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	
<b>England x10</b>	20	20	21	22	23	23	24	25	26	27	28	29	30	31	61.9%
North Warwickshire	4	4	4	5	5	5	5	5	6	6	6	6	6	6	61.9%
Nuneaton and Bedworth	6	6	6	7	7	7	7	8	8	8	8	9	9	9	61.9%
Rugby	22	23	24	24	25	26	27	28	29	30	31	32	33	35	61.9%
Stratford-on-Avon	115	119	123	127	132	136	141	146	151	157	162	168	174	180	61.9%
Warwick	43	45	46	48	49	51	53	55	57	59	61	63	65	67	61.9%
<b>Warwickshire</b>	188	194	201	208	215	223	231	239	247	256	265	274	284	294	61.9%

<b>Holiday Spend</b> millions <i>(England x10)</i>	Increase at 3.5%														Total Increase
	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	
<b>England (x10)</b>	11	12	12	12	13	13	14	14	15	15	16	16	17	17	61.9%
North Warwickshire	1	1	1	1	1	1	1	1	1	1	1	1	1	1	61.9%
Nuneaton and Bedworth	1	1	1	2	2	2	2	2	2	2	2	2	2	2	61.9%
Rugby	11	12	12	13	13	14	14	14	15	16	16	17	17	18	61.9%
Stratford-on-Avon	73	75	78	81	84	86	89	93	96	99	103	106	110	114	61.9%
Warwick	11	12	12	13	13	14	14	14	15	16	16	17	17	18	61.9%
<b>Warwickshire</b>	96	99	103	106	110	114	118	122	126	131	135	140	145	150	61.9%

**Appendix Section 4:4 Accommodation Growth predictions at 5%**

	Increase at 5%	Increase at 5%	Increase at 5%	Increase at 5%	Increase at 5%	Increase at 5%	Increase at 5%	Increase at 5%	Increase at 5%	Increase at 5%	Increase at 5%	Increase at 5%	Increase at 5%	Increase at 5%	Total Increase
<b>All Trips</b>	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	
<b>000's</b>															
<i>England</i>	1072	1125	1182	1241	1303	1368	1436	1508	1584	1663	1746	1833	1925	2021	98.0%
North Warwickshire	47	50	52	55	57	60	63	66	70	73	77	81	85	89	98.0%
Nuneaton and Bedworth	51	54	57	60	63	66	69	72	76	80	84	88	92	97	98.0%
Rugby	163	172	180	189	199	209	219	230	241	254	266	280	294	308	98.0%
Stratford-on-Avon	581	610	640	672	706	741	778	817	858	901	946	993	1043	1095	98.0%
Warwick	307	322	338	355	373	391	411	431	453	476	499	524	551	578	98.0%
<b>Warwickshire</b>	1144	1201	1261	1324	1391	1460	1533	1610	1690	1775	1864	1957	2055	2157	98.0%

	Increase at 5%	Increase at 5%	Increase at 5%	Increase at 5%	Increase at 5%	Increase at 5%	Increase at 5%	Increase at 5%	Increase at 5%	Increase at 5%	Increase at 5%	Increase at 5%	Increase at 5%	Total Increase	
<b>Holiday Trips</b>	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	
<b>000's</b>															
<i>England</i>	48	50	53	56	58	61	64	68	71	75	78	82	86	91	98.0%
North Warwickshire	11	12	12	13	14	14	15	16	17	17	18	19	20	21	98.0%
Nuneaton and Bedworth	7	8	8	9	9	9	10	10	11	11	12	13	13	14	98.0%
Rugby	41	43	45	47	50	52	55	58	61	64	67	70	74	77	98.0%
Stratford-on-Avon	333	349	367	385	405	425	446	468	492	516	542	569	598	628	98.0%
Warwick	82	86	91	95	100	105	110	116	122	128	134	141	148	155	98.0%
<b>Warwickshire</b>	470	494	519	545	572	600	630	662	695	730	766	805	845	887	98.0%

**Appendix Section 4:4 Accommodation Growth predictions at 5%**

	Increase at 5%	Increase at 5%	Increase at 5%	Increase at 5%	Increase at 5%	Increase at 5%	Increase at 5%	Increase at 5%	Increase at 5%	Increase at 5%	Increase at 5%	Increase at 5%	Increase at 5%	Total Increase	
<b>All Nights</b>	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	
<b>000's</b>															
<i>England (100,000's)</i>	310	326	342	359	377	396	416	437	459	481	506	531	557	585	98.0%
North Warwickshire	106	111	117	122	128	135	142	149	156	164	172	181	190	199	98.0%
Nuneaton and Bedworth	96	100	105	111	116	122	128	134	141	148	156	163	172	180	98.0%
Rugby	411	431	453	476	499	524	551	578	607	637	669	703	738	775	98.0%
Stratford-on-Avon	1336	1403	1473	1547	1624	1705	1790	1880	1974	2072	2176	2285	2399	2519	98.0%
Warwick	572	600	630	662	695	729	766	804	844	887	931	978	1026	1078	98.0%
<b>Warwickshire</b>	2530	2657	2789	2929	3075	3229	3391	3560	3738	3925	4121	4327	4544	4771	98.0%
<b>Warks +</b>	3861	4054	4257	4470	4693	4928	5174	5433	5705	5990	6289	6604	6934	7281	98.0%

	Increase at 5%	Increase at 5%	Increase at 5%	Increase at 5%	Increase at 5%	Increase at 5%	Increase at 5%	Increase at 5%	Increase at 5%	Increase at 5%	Increase at 5%	Increase at 5%	Increase at 5%	Total Increase	
<b>Holiday Nights</b>	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	
<b>000's</b>															
<i>England</i>	158	166	174	183	192	202	212	222	233	245	257	270	284	298	98.0%
North Warwickshire	25	26	27	28	30	31	33	34	36	38	40	42	44	46	98.0%
Nuneaton and Bedworth	22	23	24	26	27	28	30	31	33	34	36	38	40	42	98.0%
Rugby	118	124	130	137	143	151	158	166	174	183	192	202	212	222	98.0%
Stratford-on-Avon	780	819	860	903	948	996	1045	1098	1153	1210	1271	1334	1401	1471	98.0%
Warwick	139	146	153	161	169	177	186	196	205	216	226	238	250	262	98.0%
<b>Warwickshire</b>	1084	1139	1195	1255	1318	1384	1453	1526	1602	1682	1766	1855	1947	2045	98.0%
<b>Warks +</b>	1393	1463	1536	1613	1693	1778	1867	1960	2058	2161	2269	2382	2502	2627	98.0%

**Appendix Section 4:4 Accommodation Growth predictions at 5%**

	Increase at 5%	Increase at 5%	Increase at 5%	Increase at 5%	Increase at 5%	Increase at 5%	Increase at 5%	Increase at 5%	Increase at 5%	Increase at 5%	Increase at 5%	Increase at 5%	Increase at 5%	Total Increase	
<b>All Spend</b>	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	
<b>millions</b>															
<i>England x10</i>	20	21	22	23	24	26	27	28	30	31	33	34	36	38	98.0%
North Warwickshire	4	4	5	5	5	5	6	6	7	7	7	8	8	8	98.0%
Nuneaton and Bedworth	6	6	7	7	7	8	8	9	9	10	10	11	11	11	98.0%
Rugby	22	24	25	26	27	29	30	32	33	35	36	38	40	42	98.0%
Stratford-on-Avon	117	122	128	135	142	149	156	164	172	181	190	199	209	220	98.0%
Warwick	44	46	48	51	53	56	59	62	65	68	71	75	79	82	98.0%
<b>Warwickshire</b>	190	200	210	220	231	243	255	268	281	295	310	326	342	359	98.0%

	Increase at 5%	Increase at 5%	Increase at 5%	Increase at 5%	Increase at 5%	Increase at 5%	Increase at 5%	Increase at 5%	Increase at 5%	Increase at 5%	Increase at 5%	Increase at 5%	Increase at 5%	Total Increase	
<b>Holiday Spend</b>	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	
<b>millions</b>															
<i>England x10</i>	11	12	12	13	14	14	15	16	17	18	18	19	20	21	98.0%
North Warwickshire	1	1	1	1	1	1	1	1	1	1	1	1	1	1	98.0%
Nuneaton and Bedworth	1	1	2	2	2	2	2	2	2	2	2	2	3	3	98.0%
Rugby	12	12	13	13	14	15	15	16	17	18	19	20	21	22	98.0%
Stratford-on-Avon	74	78	81	85	90	94	99	104	109	115	120	126	133	139	98.0%
Warwick	12	12	13	13	14	15	15	16	17	18	19	20	21	22	98.0%
<b>Warwickshire</b>	97	102	107	113	118	124	130	137	144	151	158	166	175	183	98.0%

## Appendix Section 5 Accommodation Opinion Results and Comment

How long have you been operating?	% of accommodation businesses surveyed	
	In business more than 3 years	In business less than 3 years
Hotels	95	5
B&B/Guesthouse/Inns	100	0
Self Catering	95	5

### Summary

Only two new operations appeared on our results  
Most properties are well established

Social Media platforms used	% of Accommodation Surveyed		
	Hotel	Guesthouses/B&B	Self Catering
Facebook	100	73	93
Twitter	50	13	27
Instagram	50	7	33
Other	0	7	0
None	0	20	7

### Summary

Facebook is a clear favourite with all hotels and all but one self-catering using it  
Twitter and Instagram are used by half of the hotels and a third of the self-caterers  
20% of the B&B's have no social media channels active

Do you have an official quality star rating?	% of accommodation businesses surveyed	
	Officially Star Rated	Not Officially Star Rated
Hotels	61	39
B&B/Guesthouse/Inns	43	57
Self Catering	53	47

### Summary

It is positive to see over 60% of all hotels still engage with star ratings  
While half of self-caterers still engage with star ratings, there is a drift away from star rating in the Guest Accommodation sector  
I would suspect that many of those choosing not to respond to the survey are not quality assessed

What level of star rating do you currently hold?	% of Accommodation Surveyed		
	Hotel	Guesthouses/B&B	Self Catering
2 Star	0	0	6
3 Star	22	15	22
4 Star	78	65	61
5 Star	0	20	11

### Summary

4\* is the predominate rating for each category  
One fifth of the Guest Accommodation is 5\* and 10% of the self-catering  
Approximately 25% of all accommodation is 3\*

Do you participate in a mystery shopping programme?	% of accommodation businesses surveyed	
	Participate in Mystery Shop Programmes	Do Not Participate in Mystery Shop Programmes
Hotels	39	61

### Summary

40% of hotels participate in a mystery shopping review

Review Sites Used	% of Accommodation Surveyed		
	Hotel	Guesthouses/B&B	Self Catering
TripAdvisor	100	89	77
Booking.com	94	56	23
Trust Pilot	11	6	0
Feefo	11	0	0
Reevo	0	0	8
Google	11	6	15
Freetobook	6	11	0
Expedia	11	11	0
None	0	0	8

### Summary

Most properties participate in TripAdvisor  
Most hotels and half of the Guest accommodation are on Booking.com  
Only hotels participate in fee based review sites  
A small percentage utilise reviews available on their booking engines

Do you operate all year round?	% of accommodation businesses surveyed	
	Open all year round	Not open all year round
Hotels	100	0
B&B/Guesthouse/Inns	86	14
Self Catering	74	26

### Summary

All hotels open year round  
25% of self-caterers do not operate year round, and 15% of Guest accommodation close

Do you primarily host business or leisure guests?	% of accommodation businesses surveyed	
	Primarily host business guests	Primarily host leisure guests
Hotels	67	33
B&B/Guesthouse/Inns	45	55
Self Catering	12	88

### Summary

Hotels generally support business traffic  
The guest accommodation business is split 50/50  
Self-caterers primarily support leisure guests - the self-caterers supporting business traffic are in the north of Warwickshire

Average Annual Occupancy	% of Accommodation Surveyed		
	Hotel	Guesthouses/B&B	Self Catering
Above 70%	47	13	38
61-70%	40	31	38
51-60%	13	25	12
41-50%	0	13	6
31-40%	0	6	0
Below 30%	0	12	6

### Summary

With nearly 90% of hotels advising over 61% occupancy on an annual basis this reflects positively  
70% of GA are showing over 50% annual occupancy  
Nearly 80% of self-catering is over 61% full all year, which is also very positive

Do you anticipate being in business in 2030?	% of accommodation businesses surveyed	
	Still operating in 2030	Not operating in 2030
Hotels	89	11
B&B/Guesthouse/Inns	45	55
Self Catering	63	37

### Summary

Of those planning to retire, 47% will sell as a going concern, 35% will close and 18% will convert to other use  
There is growing disillusion with running Guest Accommodation which is contra to the rise in Airbnb

Average Weekend Occupancy	% of Accommodation Surveyed		
	Hotel	Guesthouses/B&B	Self Catering
Above 70%	50	33	46
61-70%	12	28	33
51-60%	19	11	7
41-50%	12	11	7
31-40%	1	6	0
Below 30%	6	11	7

### Summary

The hotels weekend occupancy drops away reflecting their reliance on business guests  
GA's show greater occupancy at the weekend, reflecting their reliance on leisure business

Are you planning to expand?	% of accommodation businesses surveyed	
	Planning to expand existing property	Not planning to expand
Hotels	22	78
B&B/Guesthouse/Inns	5	95
Self Catering	10	90

**Summary**

Over 20% of hotels are looking to expand, reflecting demand in the region

Average Length of Stay	% of Accommodation Surveyed		
	Hotel	Guesthouses/B&B	Self Catering
1 Night	56	29	0
2-3 Nights	44	66	37
4-7 Nights	0	5	53
8+ Nights	0	0	10

**Summary**

There is a clear opportunity to try and increase the number of nights stay in hotels and GA  
Nearly 40% of traffic to SC is for 2-3 nights reflecting the trend for shorter stays

Tried to expand but couldn't get planning permission?	% of accommodation businesses surveyed	
	Tried to expand but couldn't get planning permission(Yes)	
Hotels	24	
B&B/Guesthouse/Inns	11	
Self Catering	12	

**Summary**

It is not possible to comment on individual applications

Are your guests primarily?	% of Accommodation Surveyed		
	Hotel	Guesthouses/B&B	Self Catering
Individuals	65	45	12
Couples	35	55	29
Families	0	0	59

**Summary**

Results mirror expectation

Have you expanded your business in the last 3 years?	% of accommodation businesses surveyed	
	Expanded business in last 3 years	Not expanded in the last 3 years
Hotels	39	61
B&B/Guesthouse/Inns	10	90
Self Catering	26	74

**Summary**

The level of investment is very positive in the hotel sector  
Also that 25% of self-caterers are expanding as well

What age range do your guests generally fall into?	% of Accommodation Surveyed		
	Hotel	Guesthouses/B&B	Self Catering
Under 35	0	0	6
35-45	56	38	35
46-60	44	52	53
Over 60	0	10	6

**Summary**

Results mirror expectation

Tried to expand but couldn't get finance?	% of accommodation businesses surveyed	
	Tried to expand but couldn't get finance (Yes)	
Hotels	0	
B&B/Guesthouse/Inns	0	
Self Catering	5	

**Summary**

Clearly lack of financing is not an issue

Biggest international markets	% of Accommodation Surveyed		
	Hotel	Guesthouses/B&B	Self Catering
USA	47	44	43
Australia	0	61	36
Germany	27	39	21
Netherlands	13	17	21
France	13	28	7
China	33	11	0
Japan	33	0	0
Poland	7	0	7
Taiwan	13	0	0
Italy	7	6	0
New Zealand	0	6	7
Spain	7	0	0
Denmark	0	0	7
Hungary	0	0	7
Belgium	0	0	7
Dubai	0	0	7
Austria	0	6	0
Canada	0	6	0

**Summary**

The major visiting countries reflect national trends  
Australians / New Zealanders are more cost conscious & experienced travellers, and tend to avoid more expensive hotels  
Far East guests are more confident in hotels  
Experienced European guests are comfortable in B&Bs and self-catering

Largest Attractors	% of Accommodation Surveyed		
	Hotel	Guesthouses/B&B	Self Catering
Shakespeare/Stratford upon Avon	50	43	56
Local History Sites	33	43	50
Business	56	57	11
NEC	17	24	11
Events	28	29	11
Countryside	22	24	56
Weddings	23	10	0

**Summary**

The attractors reflect expectations

Countryside is a positive performer for self-caterers

Business traffic is also a strong performer for hotels and B&Bs

Accessibility of properties	% of Accommodation Surveyed		
	Hotel	Guesthouses/B&B	Self Catering
Step free / single level access	44	23	42
Hearing loop	33	0	0
Accessible parking spaces	72	59	37
Accessible bathroom	78	50	37
Accessible public	78	14	16
Visually impaired adjustments	17	0	0
N/A	11	32	42

**Summary**

It is a concern that less than 50% of all sectors have step free access

It is also a concern that 12% of hotels do not have accessible bathrooms, although this is not the law

Overall more should be done to support accessible needs

Online booking sites used	% of Accommodation Surveyed		
	Hotel	Guesthouses/B&B	Self Catering
Own website	100	88	86
Shakespeare's England	17	6	0
Northern Warwickshire Tourism	0	0	7
Booking.com	100	53	21
AirBnB	0	24	43
Expedia	83	29	7
TripAdvisor	56	18	24
LateRooms	72	18	7
Classic British Hotels	6	0	0
FreetoBook	6	6	0
HomeAway	0	0	7
Eviivo	0	0	7
FarmStay UK	0	0	7

**Summary**

The hotels are reliant on OTA traffic from Booking.com, Expedia, Laterooms and Tripadvisor

Nearly 25% of B&Bs and 45% of self-caterers use Airbnb as a marketing channel

Only a fraction support their local tourism agencies

GDS used	% of Accommodation Surveyed		
	Hotel		
Amadeus	11		
Sabre	22		
Travelport/Galileo	11		
Own Corporate distribution system	28		
None	28		

**Summary**

30% of hotels do not use a GDS, 30% their own brand and the remaining 30% are shared

Percentage of UK domestic Travellers	% of Accommodation Surveyed		
	Hotel	Guesthouses/B&B	Self Catering
0-50%	13	10	7
51-70%	6	32	7
71-84%	50	32	7
85%+	31	26	79

**Summary**

The level of international guest is extremely positive, especially in the B&B sector

UK domestic business dominates the self-catering sector

Percentage level of repeat business	% of Accommodation Surveyed		
	Hotel	Guesthouses/B&B	Self Catering
0-20%	14	33	38
21-40%	29	11	31
41-60%	29	28	12
61-80%	14	28	19
81%+	14	0	0

**Summary**

Around 60% of hotels and B&Bs show over 40% repeat business, this is very positive and reflects the quality of the local offering.

Facilities available	% of Accommodation Surveyed		
	Hotel	Guethouses/B&Bs	Self Catering
Bar	94	10	11
Restaurant	94	5	6
Meeting Space	89	14	6
Spa	33	0	0
Golf	17	0	6
Leisure facilities (Gym,Pool)	50	0	6
None	0	81	83

**Summary**

The hotels in the region provide a good spread of facilities

Nearly 90% of them offer meeting space.

# M Assessment Services

## Appendix; Section 6: STAKEHOLDERS Consultation

### (1) Consultation with Stakeholders

Meetings with key stakeholders were carried out as part of the actions undertaken in this initiative to understand the local environment. A list of principal contacts was provided and has evolved during the process.

This is a full summary of Key Comments; meetings were undertaken with:

**North Warwickshire DC** – Rachel Stephens, Claire Haines  
Summary, Rachel Stephens, Clare Haines, Community Development Officer (Rural Regeneration)

#### New Developments and Attractors

- Triumph Motorcycles Experience, Hinckley.
- British Cycling Tours and Birmingham Velo.
- Bosworth Battlefield.

#### Plans

A recent destination review and plan has been created for 2017-2022 with the neighbouring Leicestershire council of Hinckley and Bosworth.

The local plan highlights pockets of land available for development, including a potentially supporting a hotel at Bassets Pole canal basin.

The MIRA site has a college and research institute and a hotel is included in plans.

As stated in the local plan, rural barns and “pubs with rooms” are the most likely opportunity for development in the area at this time.

**North Warwickshire Tourism Association** – Ann Prosser, Former Chairman NWTAA and owner, Hipsley Farm Cottages

#### Overview

Very little of the business coming to Hipsley Farm’s 10 self-catering units is for leisure visits. Most are for local business developments and building specialists, who stay for many weeks, if not months. This business pays well, is regular and the business guests are respectful of the property.

Hipsley also receives local VFR traffic (visiting friends and relatives), mostly short stay if UK domestic customers, but longer if international.

The trend for shorter exhibitions at the NEC is also impacting business – people and exhibitors are likely to come in later and leave earlier, but the Motorbike Show and Caravan and Camping Show still deliver regular business.

Brexit is impacting the short-term market as people are not willing to commit to projects in the short term, causing a knock-on impact to accommodation.

**Rugby Borough Council** – Stephanie Chettle-Gibrat, Head of Growth and Investment, Emma Wilson, Place Marketing Officer

#### Summary

- A new Destination Management Plan has recently been completed.
- A visitor working group is supporting development between Rugby School, the Rugby Museum and the Rugby Museum and Art Gallery.
- With 50% of the borough being green belt, it hosts many day visitors.
- A potential hotel is cited for development on the Council Offices Site in the centre of Rugby.
- A weekend pass is being considered for local events as plenty of availability exists at the brand hotels that primarily host business visitors during the week, including the Ibis and Premier Inn.

- Development at Draycott Water, close to Dunchurch Park Hotel, is being discussed with Severn Trent Water.
- A new professional theatre company in the town is having an impact, and compliments activity at Benn Hall.

**Nuneaton and Bedworth DC** – Chris Lawes, Economic Development, Jonathan White, Town Centre Manager, Events and Markets and James Corden

### Summary

Nuneaton and Bedworth BC completed a Destination Assessment in 2016.

Jonathan White discussed the Transforming Nuneaton Document, advising that there was not a viable night-time economy in the town and that this reduced the need for overnight stays. The project was considering potential new provision to help deliver this.

The team advised that business tourism is strong and that they are looking towards the visitor economy to increase business. The area has a strong mining heritage, an area under consideration for development.

There is a plan to develop the Transport Hub. This is on the back of the new service to London on the LNER West Coast Mainline which now puts London within about an hour of Nuneaton. The Council is already purchasing sites within which to redevelop this area of town, this potentially will include hotels and restaurants.

The Borough Plan is currently being updated. It will be finished around the end of February 2019. It will include incentives for development in potential locations, particularly in areas B1, B2 and B8, industry, logistics and manufacturing.

The team believe that they are missing out on promoting George Eliot and creating a brand around her heritage for the town.

**Stratford Upon Avon DC** – Simon Purfield, Performance, Consultation & Insights Manager

Simon directed MAS towards the Latest Economic Assessment 2017 and Tourism Impact reports. No accommodation audit work has been done since 2014.

**Stratford on Avon DC** - John Careford, Policy Manager (Enterprise, Housing & Planning), Pat Matjaszek, Business Enterprise and Tourism Officer, Rosemary Williams, Policy Planner

Areas of requirements that were identified are, in summary:

- (1) Lack of business, conference and meeting space to accommodate larger groups.
- (2) Need for new RV / motorhome parks and storage
- (3) Concern about traffic – A46 plans to improve and widen and creation of the western bypass to Waitrose roundabout.
- (4) Central development in “Gateway Quarter” – maps provided and potential site at BHS store in centre of town in Bridge Street and the old Stratford Picture House.
- (5) Provision of zonal development for “canal quarter” with new moorings and refurbishment.
- (6) Need for more student accommodation.

**Stratford** – Jo Baconnet, Chief Executive

Stratford has just been through the third BID process for the town centre, under Jo Baconnet. The marketing programme is moving towards exploiting niches in the sector, working in parallel but not in competition with Shakespeare’s England. For instance, Stratford has delivered a tax / duty free shopping initiative for the town centre.

- The BID team are instrumental in tracking visitor traffic through the town centre using mobile phone IP addresses, determining local versus visitor traffic. This allows the team to focus on seasonal variations and the impact of how traffic drops while the RSC is dark, in between plays. It also delivers clear evidence of how well events such as the Christmas Market is both supported by visitors and locals alike.
- Stratford is keenly aware of the available sites in town which are prime for development; these include the Old Picture House site, the closed BHS store site and the development programme for the Stratford Gateway corridor, covered in the supplementary planning document. They are also keen to support the plans proposed for the Canal Quarter.
- Jo discussed how historically rural businesses had struggled to expand in green belt areas due, especially within Warwick DC. Restrictive planning legislation made expansion in these areas difficult. Stratford are open to how changes in planning policy might help them to develop.



## **Shakespeare's England – Helen Peters, Chief Executive**

Tourism development is full flow in the Shakespeare's England, the area covered by Warwick DC and Stratford-on-Avon DC.

Developments identified included:

- The new RSC costume centre supported by the CWLEP with a £1m investment.
- The Birthplace Trust, with a £500k investment from the CWLEP for Henley Street with a new bistro and arts centre.
- Pump Rooms in Leamington Spa with new conference space.
- Hotel at Dallas Burton Polo Fields, with 50 rooms and a new Gastro Pub in Southam.
- The Farm @ Snitterfield with major farm shop and farm experience.
- The Shakespeare Gin Distillery.
- New products with Studley Castle becoming a Warner Hotel, with rumours of Heythrop Park (Chipping Norton) also doing the same.
- Chiltern Railways have committed to more "non-stop" train service to Stratford upon Avon, without the need to change at Leamington Spa.
- More "vintage" trains services are being made available with operator's licences being granted to the Tysley development.

### **Issues**

There is a fundamental lack of "coach" tour guest accommodation in the region. There is not enough hotel availability to offer group space.

The potential numbers that could be driven into Shakespeare's England are only limited by the space available and the capacity it can accommodate. Most international tours pass through the towns of Warwick and Stratford but overnight further north. Tours that do stay locally often stay in Coventry and then commute to Stratford and Warwick.

## **Warwick DC - Suzee Laxton, Strategic Economic Development Officer**

### **Summary**

Key highlights in the DC are:

- Victoria Park, the home of the National Lawn Bowls Championships, will host the Bowls during the Commonwealth Bowls.
- Developments: -
- Leamington Spa is developing the Creative Quarter, south of the river and near to the Pump Rooms and a seeking sites for a Boutique Hotel to support business tourism.
- Plans for a potential hotel site at Warwick Racecourse are struggling to find a developer – the site is at the far side (west) of the grandstand.
- A further site is in the Gallows Hill area of Bishops Tachbrook.
- Warwick DC understand the expansion of Airbnb and is proposing to make change of use planning permissions, required for Airbnb's. Furthermore, support of a Safe, Clean and Legal accreditation for these properties is under discussion.
- Support for students is also an issue. More student rooms are required and space to host VFR traffic is also required.

## **Warwickshire CC – David Ayton Hill, Economic Development**

### **Summary**

Key points were covered of the economic development arena impacting Warwickshire.

The type of support available for development including capital grants available from EFRID, LEADER and the Shared Prosperity Fund were discussed. Brexit may have an impact on some of these.

A definite concern for a lack of quality accommodation was highlighted, and although it might not fit with mainstream visitors, there was a sector of the market that needed a five star property for supporting high worth individuals and industrialists.

It was highlighted that there was no central Warwickshire CC document for development and that that fell to the CWLEP. Also highlighted that the LEP had added a tourism pillar to its strategy.

WCC's concerns are around skills and the development of the rural sector. Skills and productivity were the big agenda.

It is a fact that is that Warwickshire has the LEP with the fastest growing economy and the fastest growing productivity. High levels of employment are good for the region but means less talent to recruit from.

Warwickshire is a non-constituent member of the West Midlands Local and Industrial Strategy. A draft strategy is being created, the question was raised, whether this document was feeding into that document.

**Summary** – Pam Neal, Joanne Archer, Transport and Planning

It is the main role of this team to advice on local planning issues. They advised that accommodation was not on the master plan as a solo item but was recognised as an economic driver.

They were aware of some new development, including in south Warwick, Swans Nest, and JLR on the A45.

They were aware of the issues around accommodation for the HS2 development, the local impact and workers compounds.

**Warwickshire County Council** - Councillor Reilly, portfolio holder for tourism.

- With a view to helping development the Councillor discussed “Green Belt swapping” that might be done at a district level. He advised that the North Warks plan was up for approval in April. It looks at development through to 2033 (15 years).
- Advised that tourism marketers should be looking to the budget “drive” market. He felt that we have a very positive food product offering that we should be highlighting more.
- Transport links should be an excellent selling point.
- The Green Heritage that Coventry City of Culture promoted is to be a principal driver of its bid.
- Keen to promote and suggest a thematic based tourism programme based around our country parks, cycling, angling and gastronomy.

**Coventry and Warwickshire LEP** – Paula Deas, CWLEP Operations Director

**Summary**

Highlighted the support they are delivering to the tourism sector, focusing funding on key attractor brands including the Royal Shakespeare Company (RSC) and the Coventry City of Culture.

Spending around £6 million including supporting Coventry Cathedral and the Belgrade Theatre, as well as the Henley Street Development by Shakespeare’s Birthplace and the RSC Costume Museum in Stratford Upon Avon.

CWLEP participation with local partners to participate at MIPIM was discussed, the world’s leading development and investment show. The literature produced clearly highlights the key development opportunities in the county. See appendix.

There are 25 key sites for development ranging from the MIRA site in the north of the county, to the Creative Quarter in Leamington, to Long Marston Airfield in Stratford On Avon DC.

**Coventry, City of Culture** - Martin Sutherland, Chief Executive

Phone Interview with Andy Woodward.

**Summary**

- The Coventry City of Culture 2021 (CCOC) plans to have 5 “Noise” events that will attract national coverage and 10 exhibitions that are targeted to attract 150,000 people each over 3 months each.
- The major events will be in the spring and summer and are targeted to be outdoor, while the exhibitions will be winter and autumn to be weather protected.
- CCOC aims to engage 80% of the local population three times during the year – Hull COC engaged 90% of the population for 1 event.
- They aim to increase visitation by 2.5million in 2021 and 1 million more in the following year.
- They are keen to work across Warwickshire and attract the Shakespeare’s England Visitors over to Coventry and then spend money in the region.
- Initial events include the (existing) Godiva Festival, a BBC Radio One Big Weekend and a Rugby League World Cup event.

## Issues

- There is major rail engineering works scheduled during 2021, particularly impacting the bank holiday weekends.

## Support

- Warwickshire CC is also a major partner and is inputting £1million. This will support Warwickshire cultural events, primarily in the north of the county (i.e. not in Shakespeare Country.) The CWLEP is also a partner also inputting £1million of Capital support to upgrade local attractions.

**The Commonwealth Games** - Neil Carney, Commonwealth Games, Birmingham Council

E-mail exchange

## Summary

This report is early in the planning cycle on the topic of visitor accommodation. The figures are an extrapolation from previous events in the UK and supported by methodology used across the industry.

## Headline Statistics

- Unique ticketed spectators anticipated – c. 300k.
- 30+% visitors expected to stay overnight.
- Average stay of 4 – 6 nights per person in the West Midlands.
- In addition to this, we would expect to have over 3,000 media staying at the time of the Games, but it should be noted that they are more likely to stay in and around Birmingham so they avail of the services put on for them at Games time, e.g. transport. The visits are anticipated to average at 12 nights per person.
- All athletes and team officials will be staying at the Commonwealth Games Village in Perry Barr during the Games (6,500 Pax).

## HS2 - Jonathon Lord

The main works contractor-Balfour Beatty Vinci (BBV) will have up to 55 operating (compounds) locations in Warwickshire. All sites will not be operational at the same time. These will range from material lay down and storage areas that are occasionally visited to major site compounds.

The major compounds are planned for the Long Itchington tunnel portal (west of Leamington), the A46 near Stoneleigh and Kingsbury (North Warwickshire). The largest compounds will be the base for up to 400 people. The smallest used as personnel base and some will have no people based at them.

In total the sites will provide a base for some 3,500 workers and 1,400 management, supervision and support staff.

However, as personnel will need to work on different activities and sites at different times this is not the workforce scales. It is likely that the number of people based in Warwickshire at any time will be 50-70% of this total, say **2,450-3,430**.

HS2 aspires to recruit and employ locally wherever they can and will focus on targets that support this.

It is still likely that some 70% of our total workforce will travel into the area and seek accommodation whilst they work. That ranges the likely population to be 1,715-2,400.

A mix of hotel, B&B, caravan pitches and rented properties are likely to be what is used.

As with many details, the numbers are indicative and may change.

Please also note that BBV cover the majority of Warwickshire; the southern section of the route (Long Itchington-Southam) is being constructed by another joint venture-EK.

## **AGEING POPULATION SUPPORT PROPOSAL**

Some things to consider:

- Higher beds that are easier to get in and out of.
- Sleep aids; music, Dodow, Dreem bands etc.
- Sensory alarm clocks that have smells and gradual light and sound building.
- Temperature control and access to fresh air.
- Large, flat door/furniture handles. Fire doors can be heavy and small door handles can make it impossible for some guests to use.
- Additional, comfortable, 'easy to get out of', firm seating in bedroom areas.
- Position of light switches, i.e. close to the bed or even technology to enable guests to easily adjust and use items such as curtains, lights or audio equipment.
- TV mounts that allow you to tilt the screens for easy viewing.
- Adjustable shower heads and a grab rail nearby, if not your shower may come off the wall at some point.
- Additional equipment in the bathroom to help with mobility. There are companies that provide fantastic temporary fittings but would strongly recommend looking at designer fittings that fit in and don't have the clinical look. For example, doubling up a towel rail as a grab rail.
- Think about the position of your toilet roll holder, it's not easy for anyone to reach behind them.
- Sink, mirror, worktop, desk heights. Could they be adjustable or alternative options given? This is where staff attitude could come in, if in a public area, are staff aware and attentive.

### **Hearing**

- Hearing loop.
- Bluetooth headphones for entertainments systems or even conference facilities.
- Flashing emergency alarms.

### **Eyesight**

- Night lights that don't startle but give guidance to other areas such as the bathroom in the middle of the night.
- Your information; menus, room guest information, signage and website. Is the lighting good, is the text clear, can you make it available with larger font, can you provide additional lighting? Reading glasses could be made available.
- Consider contrasting colours with your décor, particularly in walkways, steps, stairs and ramps.

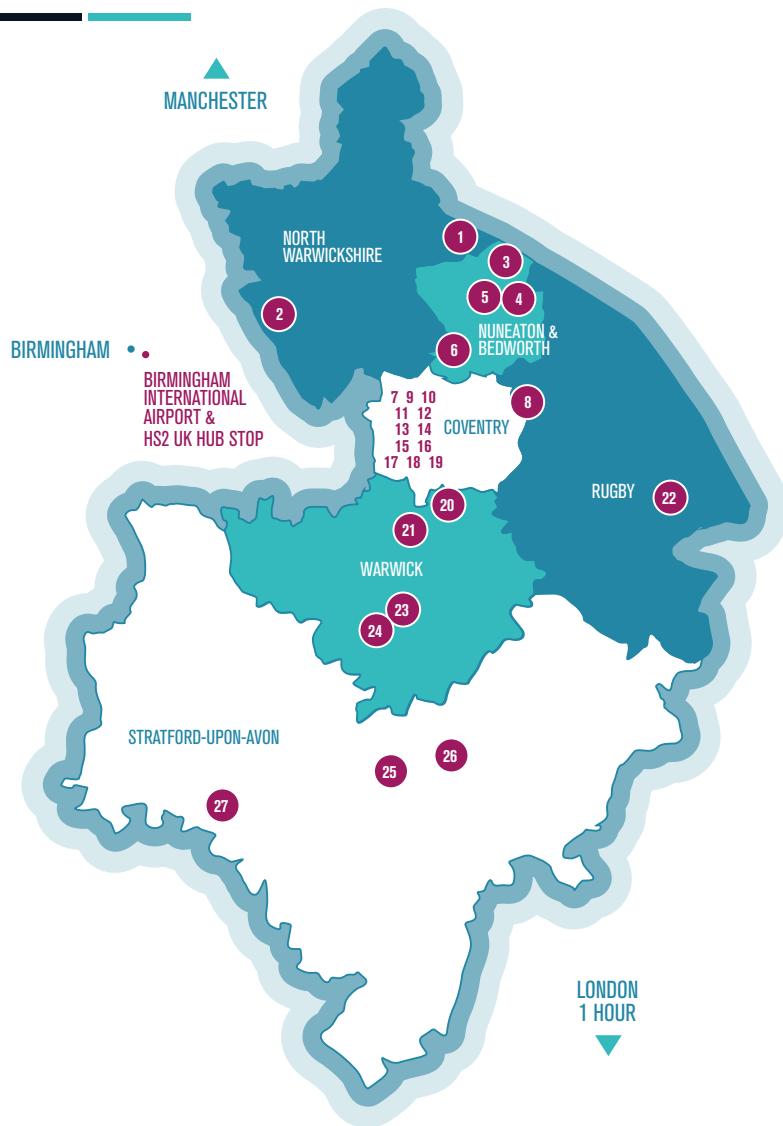
### **Dementia**

- As above for those with impaired sight, contrasting colours can be very helpful for those with dementia, allowing colour to illustrate different areas of a room, i.e. grab and storage areas in a bathroom.
- Additional rooms for carers, spouses. There is a lot of respite care available which doesn't cater well for other halves who wish to join.
- Activities and experiences suitable for those with dementia.
- Staff attitude and knowledge. Consider training.
- Nostalgic items or music, doing your research beforehand won't cost a thing.

### **You and Your Staff**

- Are you and your staff aware and compassionate for guests with different needs and able carry out their normal tasks without making anyone feel inferior whilst being light-hearted and kind.
- Consider training for any or all the above areas, a WelcomeAll training course will cover all aspects and more.
- Have your staff taken extra care to ensure that, if in an emergency this guest is in the right place and can evacuate quickly and safely.
- Have you made every effort, within reason to make all your facilities and offering available to the ageing population. For example, do you have a process for a guest that's hard of hearing to receive a wake-up call or do you have a process for a guest that's arthritic with bad sight to use your fancy toiletries that might actually be impossible for them to open never mind read which one is shampoo and which one is conditioner.

# CREATING OPPORTUNITIES



## MIRA Southern Manufacturing Site

Site size: 90 Acres (36.4 Hectares)  
 Usage: Automotive & Transport Technology Manufacturing  
 Developer: HORIBA MIRA  
 Authority: North Warwickshire Borough Council  
 Local to: Toyota, Triumph, Changan, Bosch, Lockheed Martin, Bentley

[www.miratechnologypark.com](http://www.miratechnologypark.com) Sat Nav: CV10 0TU



## Prologis HAMS HALL

Site size: 886,970sqft  
 Usage: B2, B8  
 Developer: Prologis  
 Authority: North Warwickshire Borough Council  
 Local to: BMW, JLR Battery Assembly

[www.prologis.co.uk/parks/prologis-park-hams-hall](http://www.prologis.co.uk/parks/prologis-park-hams-hall) Sat Nav: B46 1GB



## Transforming Nuneaton

Site size: 14 Acres (5.6 Hectares)  
 Usage: Mixed Use, Residential, Leisure & Office  
 Developer: Local Authorities & Partners  
 Authority: Nuneaton & Bedworth Borough Council  
 Local to: Holland & Barrett, FedEx, Cadent Gas, Dairy Crest, HORIBA MIRA

[www.warwickshire.gov.uk/transformingnuneaton](http://www.warwickshire.gov.uk/transformingnuneaton) Sat Nav: CV11 4DR



## Local Plan 107

Site size: 107 Hectares across various sites  
 Usage: B1, B2 & B8 (Office, Industrial, Distribution)  
 Developer: Various  
 Authority: Nuneaton & Bedworth Borough Council  
 Local to: Holland & Barrett, Aston Martin Lagonda, Brose, HORIBA MIRA

[www.warwickshire.gov.uk/invest](http://www.warwickshire.gov.uk/invest) Sat Nav: CV10 7JU



## Allen Ford Nuneaton - MCS Group

Site size: 2.46 acres (1 hectare)  
 Usage: £2.7m Showroom, workshop and offices  
 Developer: MCS Group  
 Authority: Nuneaton & Bedworth Borough Council  
 Local to: Holland & Barrett, Aston Martin Lagonda

[www.mcs-ltd.com/projects/allen-ford-nuneaton/](http://www.mcs-ltd.com/projects/allen-ford-nuneaton/) Sat Nav: CV10 7RB



## Loades Eco Parc

Site size: 15 Acres (6 Hectares)  
 Usage: B1, B2 & B8 (Office, Industrial, Distribution)  
 Developer: Loades estates  
 Authority: Nuneaton & Bedworth Borough Council  
 Local to: Aston Martin Lagonda, Brose, Lear

[www.loadesecoparc.co.uk](http://www.loadesecoparc.co.uk) Sat Nav: CV7 9FW



## 7 Eastern Green Coventry

Site size: 435 acres (176 hectares)  
 Usage: Residential led mixed use strategic urban extension  
 Promoters: Hallam Land Management Ltd, Bracebridge Holdings Limited, Coventry City Council and other parties.  
 Authority: Coventry City Council

[www.oxalisplanning.co.uk/eastern-green.html](http://www.oxalisplanning.co.uk/eastern-green.html)  
[www.fpcr.co.uk/work-progresses-on-eastern-green/](http://www.fpcr.co.uk/work-progresses-on-eastern-green/) Sat Nav: CV5 9AL



## 8 Coventry Station Extension

Site size: 10 acres (4 hectares)  
 Usage: Transport Hub, Retail, Car Parking  
 Developer: Network Rail / Coventry City Council  
 Authority: Coventry City Council  
 Local to: Network Rail

[www.coventry.gov.uk/stationmasterplan](http://www.coventry.gov.uk/stationmasterplan) Sat Nav: CV1 2GT



## 13 Retirement Living Development (Bond Street)

Site size: 0.6 acres (0.2 hectares)  
 Usage: Residential  
 Developer: Deeley Group  
 Authority: Coventry City Council

[www.deeley.co.uk](http://www.deeley.co.uk) Sat Nav: CV1 4AN



## 14 City Centre South

Site size: 17 acres (6.9 hectares)  
 Floor Space: 1.2m sq. ft.  
 Usage: Retail, Leisure, Residential  
 Developer: Shearer Property Group  
 Authority: Coventry City Council

[www.spglondon.com](http://www.spglondon.com) Sat Nav: CV1 1LF



## 9 Daimler Wharf

Site size: 6 acres (2.4 hectares)  
 Usage: Residential, Leisure, Employment  
 Developer: The Wigley Group  
 Authority: Coventry City Council

[www.thewigleygroup.com](http://www.thewigleygroup.com) Sat Nav: CV1 4DQ



## 10 Upper Precinct

Site size: 1.79 acres (0.72 hectares)  
 Floor Space: 85,000 sq. ft.  
 Usage: Retail  
 Developer: Shearer Property Group  
 Authority: Coventry City Council

[www.spglondon.com](http://www.spglondon.com) Sat Nav: CV1 1FS



## 15 Cathedral Lanes

Site size: 0.82 acres (0.68 hectares)  
 Floor Space: 65,000 sq. ft.  
 Usage: Retail, Restaurants, Bars  
 Developer: Shearer Property Group  
 Authority: Coventry City Council

[www.spglondon.com](http://www.spglondon.com) Sat Nav: CV1 1LL



## 16 Coventry University City Centre Development

Site size: 4.5 acres (1.8 hectares)  
 Usage: Education, R&D Business, Leisure  
 Developer: Coventry University  
 Authority: Coventry City Council

[www.coventry.ac.uk](http://www.coventry.ac.uk) Sat Nav: CV1 2PY



## 11 Bishop Gate Phase 2 & 3

Site size: 0.6 acres (0.25 hectares)  
 Usage: Student Accommodation  
 Developer: Barberry Developments Ltd  
 Authority: Coventry City Council

[www.barberry.co.uk](http://www.barberry.co.uk) Sat Nav: CV1 1JN



## 12 Telegraph Regeneration Area, Coventry

Site size: 2.74 acres (1.1 hectares)  
 Usage: 4\* Boutique Hotel/Student Housing  
 Developer: Complex Development Projects Ltd  
 Authority: Coventry City Council  
 Operator: Bespoke Hotels

[www.complexdevelopmentprojects.co.uk](http://www.complexdevelopmentprojects.co.uk) Sat Nav: CV1 1GU



## 17 Coventry - Gulsion Road

Site size: 0.8 acres (0.3 hectares)  
 Usage: Residential  
 Developer: Rainier Developments Ltd  
 Authority: Coventry City Council

[www.rainierdevelopments.co.uk](http://www.rainierdevelopments.co.uk) Sat Nav: CV1 2JP



## 18 Friargate

Site size: 36 acres (14.6 hectares)  
 Usage: Business, Retail, Leisure, Residential  
 Developer: Friargate JV Project Limited  
 Authority: Coventry City Council  
 Local to: Coventry City Council, Financial Ombudsman, Homes England

[www.friargate.co.uk](http://www.friargate.co.uk) Sat Nav: CV1 2FJ



## 19 Prospero Ansty

Site size: 196 Acres (79 Hectares)  
 Usage: B1 & B2. Compatible with a high tech business park environment  
 Developer: Manse Opus  
 Authority: Rugby Borough Council  
 Local to: Rolls Royce Aero, Geely LEVC, Fanuc, AVL Powertrain  
[www.prosperto-ansty.com](http://www.prosperto-ansty.com) Sat Nav: CV7 9JR



## 20 Coventry and Warwickshire Gateway

Site size: 260 Acres (Phased Development)  
 Usage: Industrial, R & D, Hotel, Ancillary Retail, Storage and Distribution  
 Developer: Coventry and Warwickshire Development Partnership  
 Authority: Coventry City Council, Warwick District Council  
 Local to: Jaguar Land Rover HQ, UK Battery industrialisation Centre  
[www.roxhill.co.uk/portfolio/coventry](http://www.roxhill.co.uk/portfolio/coventry) Sat Nav: CV8 3BB



## 23 Creative Quarter, Leamington Spa

Site size: 14 Acres (5.3 Hectares)  
 Usage: Office, Mixed Use, Residential  
 Developer: Complex Development Projects Ltd in association with Warwick District Council  
 Authority: Warwick District Council  
[www.leamingtoncreativequarter.co.uk](http://www.leamingtoncreativequarter.co.uk) Sat Nav: CV31 3SY



## 24 Lower Heathcote

Site size: 1600 homes  
 Usage: Residential  
 Consultants: Pegasus Group for Gallagher Estates  
 Authority: Warwick District Council  
 Local to: Kantar, IBM, National Grid, Siemens  
[www.pegasusgroup.co.uk](http://www.pegasusgroup.co.uk) Sat Nav: CV34 6BF



## 21 Stoneleigh Park

Site size: 100 Acres (40 Hectares)  
 Usage: B1, B2 - Science and innovation R&D  
 Developer: La Salle  
 Authority: Warwick District Council  
 Local to: AHDB, Agricom, Brammer  
[www.stoneleighparkestate.com](http://www.stoneleighparkestate.com) Sat Nav: CV8 2LG



## 22 Houlton, Rugby

Site size: 1167 Acres (473 Hectares)  
 Usage: Residential & Employment  
 Developer: Urban & Civic  
 Authority: Rugby Borough Council  
 Local to: DIRFT  
[www.houltonrugby.co.uk](http://www.houltonrugby.co.uk) Sat Nav: CV23 1AL



## 25 University of Warwick Wellesbourne Innovation Campus

Site size: 473 acres (191 hectares)  
 Usage: R&D, Innovation, Education  
 Developer: University of Warwick  
 Authority: Stratford-on-Avon District Council  
 Local to: WMG Smart City Mobility Centre, Aston Martin Lagonda, Wellesbourne Airfield  
[www.warwick.ac.uk/business/wellesbourne](http://www.warwick.ac.uk/business/wellesbourne) Sat Nav: CV35 9EF



## 26 Kingston Grange

Site size: 900 Acres (364 Hectares)  
 Usage: Residential, B1, B2  
 Developer: CEG  
 Authority: Stratford on Avon District Council  
 Local to: Jaguar Land Rover Design and Engineering HQ, Aston Martin Lagonda HQ  
[www.ceg.co.uk/case-studies/ligthorpe-heath](http://www.ceg.co.uk/case-studies/ligthorpe-heath) Sat Nav: CV35 0RR



## 27 Long Marston Airfield Garden Village

Site size: 506 Acres (205 Hectares)  
 Usage: Residential, B1, B2  
 Developer: CALA Homes  
 Authority: Stratford on Avon District Council  
 Local to: Vivarail, TrustFord, Wanzl, Transport Design International, University of Birmingham BCRRE  
[www.cala.co.uk](http://www.cala.co.uk) Sat Nav: CV37 8LL



## MSA Service Area, M42 J5/6

Usage: Mixed Use  
 Developer: Extra MSA  
 Authority: Solihull MBC  
 Local to: NEC, BHX, Touchwood, JLR  
[www.extraservices.co.uk](http://www.extraservices.co.uk)

# M Assessment Services

## Appendix Section 9 - Ageing Population Solution

The ageing population has time, money and a desire to continue enjoying life's pleasures and that's why taking advantage of this market is good for both parties. Barclays bank say that the over 65s contribute £37billion to the UK's Hospitality and Leisure sectors, that's more than a third of the average consumer. Surprisingly, more the 3 quarters of businesses say they have no intention of making any changes or enhancements to cater for the ageing population. It is also noted, not unlike guests will mobility issues, that the ageing population are much more loyal customers and far more likely to pass on good experiences as well as return.

There are several factors that should be considered as part of your business that can and will impact the ageing population. Your information, the physicality of your business and the attitude of you and your staff. This can be broken down into segments.

There are many things that can be carried out in order to improve the guest experience for someone that fits in this category. Accor Hotels and Premier Inn are very good examples of market leaders that have taken steps to make these changes and a lot can be taken from this. Accor want to remove the divide between accessible rooms and standard rooms, making them suitable and attractive for all. Obviously, all changes can vary in investment but there is always something that will make the difference no matter how big or small.

### Mobility

Some things to consider;

- Higher beds that are easier to get in and out of.
- Sleep aids; music, Dodow, Dreem bands etc.
- Sensory alarm clocks that have smells and gradual light and sound building.
- Temperature control and access to fresh air.
- Large, flat door/furniture handles. Fire doors can be heavy and small door handles can make it impossible for some guests to use.
- Additional, comfortable, 'easy to get out of', firm seating in bedroom areas.
- Position of light switches, i.e. close to the bed or even technology to enable guests to easily adjust and use items such as curtains, lights or audio equipment.
- TV mounts that allow you to tilt the screens for easy viewing.
- Adjustable shower heads and a grab rail nearby, if not your shower may come off the wall at some point.
- Additional equipment in the bathroom to help with mobility. There are companies that provide fantastic temporary fittings but would strongly recommend looking at designer fittings that fit in and don't have the clinical look. For example, doubling up a towel rail as a grab rail.
- Think about the position of your toilet roll holder, it's not easy for anyone to reach behind them.



- Sink, mirror, worktop, desk heights. Could they be adjustable or alternative options given? This is where staff attitude could come in, if in a public area, are staff aware and attentive.

### Hearing

- Hearing loop.
- Bluetooth headphones for entertainments systems or even conference facilities.
- Flashing emergency alarms.

### Eye sight

- Night lights that don't startle but give guidance to other areas such as the bathroom in the middle of the night.
- Your information; menus, room guest information, signage and website. Is the lighting good, is the text clear, can you make it available with larger font, can you provide additional lighting? Reading glasses could be made available.
- Consider contrasting colours with your décor, particularly in walkways, steps, stairs and ramps.

### Dementia

- As above for those with impaired sight, contrasting colours can be very helpful for those with dementia, allowing colour to illustrate different areas of a room, i.e. grab and storage areas in a bathroom.
- Additional rooms for carers, spouses. There is a lot of respite care available which doesn't cater well for other halves who wish to join.
- Activities and experiences suitable for those with dementia.
- Staff attitude and knowledge. Consider training.
- Nostalgic items or music, doing your research beforehand won't cost a thing.

### You and your staff

- Are you and your staff aware and compassionate for guests with different needs and able carry out their normal tasks without making anyone feel inferior whilst being light hearted and kind.
- Consider training for any, or all, of the above areas, a Welcome All training course will cover all aspects and more.
- Have your staff taken extra care to ensure that, if in an emergency this guest is in the right place and can evacuate quickly and safely.
- Have you made every effort, within reason to make all your facilities and offering available to the ageing population .For example, do you have a process for a guest that's hard of hearing to receive a wake-up call or do you have a process for a guest that's arthritic with bad sight to use your fancy toiletries that might actually be impossible for them to open never mind read which one is shampoo and which one is conditioner.