Developing a tourist accommodation registration scheme in England: analysis of the call for evidence

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Alma Economics combines unparalleled analytical expertise with the ability to communicate complex ideas clearly.

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About the commissioning organisation

Department for Culture, Media & Sport

This independent analysis was commissioned by the Department for Culture, Media & Sport (DCMS). The analysis and findings are those of the authors and do not represent the views of DCMS.

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Executive summary

The rise of digital platforms such as Airbnb and Booking.com has led to a significant increase in the range and volume of guest accommodation options available to visitors, particularly short-term and holiday lets. By connecting owners of residential properties with people seeking short-term accommodation, these platforms have expanded consumer choice, provided access to new and more flexible income streams for owners and offered new routes to market for many forms of accommodation businesses. However, some have also raised concerns around compliance with existing regulations (such as planning rules or health/safety requirements) and the impact on existing communities (from noise/uncivil behaviour or limiting the supply of units in the long-term rental market). To address these concerns, some countries and cities (including Scotland, Northern Ireland, New York City, Barcelona and Amsterdam) have introduced measures in recent years such as registration and licensing schemes.

There currently is no single, definitive source of data on short-term and holiday lets in England, in part due to (i) difficulties defining which lets are considered short-term, and (ii) lack of obligations for short-term let owners to report information on staying guests to local or national authorities. Existing data sources, including surveys, data published by private companies or data collected from third party providers such as AirDNA, suggest that the number of short-term and holiday lets have increased significantly in recent years, and despite a slowdown during the Covid-19 pandemic in 2020 and 2021, the market is expected to continue growing as the tourism sector as a whole recovers.

A call for evidence by the Department for Culture, Media and Sport (DCMS) took place between July and September 2022 to help the government (i) develop a fuller understanding of the current short-term and holiday lets market and (ii) gather evidence on the potential impact of a range of possible policy options in this space. Both of these objectives are aimed at helping the UK government consider whether there are options that should be pursued further through consultation. Alma Economics, an independent research consultancy, was commissioned by DCMS to analyse the responses to this call for evidence.

Key findings from the call to evidence include:

Respondent characteristics

- In total, 90% of responses were submitted by individuals, and 10% were submitted by organisations. The majority of responses to the call for evidence was submitted by hosts operating in the short-term and holiday letting market (59% of all respondents). Among organisations, the largest respondent type was guest accommodation operators (3% of all respondents).

Shape of the market

- Very few respondents shared data on the size and nature of the short-term and holiday letting market in England and/or its regions. While there is no single source of national data on short-term lets activity in England, the data that was shared by a very small number of organisational respondents suggests that one plausible estimate for the total number of short-term and holiday lettings in England in 2022 is 257,000. However, this is likely to be an underestimate as the data shared by organisations did not cover all short-term and holiday letting platforms and the same property could be listed on multiple platforms.

- Data provided by organisational respondents indicates that between 69-76% of total listings are for entire premises, the average booking length is 4-6 days, properties tend to be occupied less than 30 days each year and hosts typically earn £6,000 annually. Nearly two-thirds of all short-term and holiday lets in England are in the South West, South East or London.
- Out of all respondents, more than half who identified as hosts had short-term lets in high-tourism areas (such as Devon, Cornwall, the Cotswolds, the Peak District, the Lake District or seaside towns such as Bournemouth). While many of these respondents did not comment on adverse impacts from the growth of short-term lets, those who did identify adverse impacts frequently mentioned they lived in one of these high-tourism areas.

Compliance

- 73% of respondents assessed levels of compliance with statutory regulations in the short-term and holiday letting market as good or very good, though this proportion was higher for hosts (84%) and lower for members of the public and organisations (60%).
- 14% of respondents considered breaches of contractual agreements in the short-term and holiday letting market to be a major problem, though this proportion was lower for hosts (7%) and higher for members of the public (31%) and organisations (25%).
- When asked about compliance with legal obligations, the two most common concerns raised by respondents were (i) the absence of data or mechanisms to monitor and enforce health and safety regulations, and (ii) lack of clarity around how short-term lets should be classified for planning policy and what tax liabilities they should face. Respondents felt that compliance with statutory regulations tended to be stronger for holiday homes let through established agencies (compared to those listed on online platforms).

Impact on the housing market and local communities

- 35% of respondents considered the increase in short-term and holiday letting to have had adverse consequences on the housing market (including a decrease in available housing and increase in house prices), though this proportion was lower for hosts (23%) and higher for members of the public (51%) and organisations (51%). On the other hand, a similar number of respondents (34%) said that the increase had not had adverse consequences on the housing market.
- 12% of respondents considered noise, anti-social or other nuisance behaviour from short-term and holiday lets to be a major problem, though this proportion was lower for hosts (3%) and organisations providing tourism accommodation (8%) and higher for members of the public (39%) and other organisations (50%).
- In addition to adverse impacts on the housing market and nuisance behaviour, many respondents felt that short-term lets had negatively impacted the social dynamics and economic trajectory of local communities, in part by limiting the available housing stock and pricing residents out of the communities.

Potential regulatory response preferences

- When asked about the most appropriate form of response in the short-term letting market, more than half of respondents (61%) preferred some form of regulatory intervention. Organisational respondents generally preferred a licensing scheme with physical checks for all lets or a registration scheme with light-touch checks (for example, a small percentage of premises randomly selected for spot-checks or requiring hosts to upload electronic documents proving legislation compliance). Individual respondents were more evenly split in their preferred form of response.

- Respondents' preferred regulatory scheme tended to be correlated with their answers to previous questions in the call for evidence: those who preferred a licensing scheme with physical checks or a registration scheme with light-touch checks thought that compliance with statutory regulations was relatively poor and the increase in short-term and holiday letting posed major problems for communities, and vice versa.
- Respondents who supported a licensing scheme with physical checks or a registration scheme with light-touch checks often expressed a willingness to cover the costs of these checks in their responses, while respondents who supported a self-certification registration scheme or a "do nothing" approach felt that costs would negatively impact owners and any scheme should be as low-cost as possible.
- Of the respondents who discussed the burdens of regulatory schemes, most suggested local authorities should be responsible as they had the most knowledge of the local housing stock/short-term lets market and were best-positioned to implement enforcement measures. A smaller number of respondents instead proposed that online platforms should be responsible, as these respondents felt that platforms already had the infrastructure needed to monitor compliance with regulations.

Limitations

- These findings carry important limitations since views shared as part of the call for evidence represent a small proportion of the market. Only a small share of the total number of hosts submitted answers and those who participated are likely to be more knowledgeable about their legal obligations and have made active efforts to comply. In turn, views of "bad actors" who do not comply with existing regulations are less likely to be captured. Therefore, findings are unlikely to be representative of hosts and other industry participants, and no data was shared in responses that could quantify the scale of regulatory or contractual breaches.
- The need for regular and consistent data collection on the short term and holiday sector continues. Specifically, data covering a wider range of online platforms, letting types, geographical regions, and revenue as well as methods of detecting duplicates across platforms could contribute to a better understanding of the sector.

1. Introduction

1.1. Short-term lets refer to the offering of residential accommodation, including single rooms within shared premises and entire premises, to one or more paying guests. In particular, short-term lets differ from private residential tenancies because they do not require the occupier to treat the property (or part of it) as their principal home. In addition, they are distinct from other forms of guest accommodation (such as hotels and B&Bs) as they take place in premises that could or would otherwise be used as a residence.

1.2. In recent years, online booking platforms such as Airbnb, Expedia, Booking.com and TripAdvisor have emerged to facilitate new entrants to the guest accommodation market. These platforms allow homeowners (or "hosts") to generate additional income by advertising opportunities for short-term stays in their home to paying guests.[1] The rise of the sharing economy has occurred while the sector has remained unregulated in England except for in London, where section 44 of the Deregulation Act 2015 stipulates that use of any residential premises in Greater London as temporary sleeping accommodation for more than 90 nights per calendar year is considered a "material change of use" from a planning perspective.

1.3. The growth of online booking platforms has created concerns that there are uneven regulatory requirements in the guest accommodation sector, and that these platforms have contributed to negative impacts on local communities compared to other types of accommodation. In response, the UK government's Tourism Recovery Plan, published in June 2021, included a commitment to consider a possible Tourist Accommodation Registration Scheme in England. A call for evidence was launched by the Department for Culture, Media and Sport (DCMS) on 29 June 2022 and ended 12 weeks later on 21 September 2022 to help the government (i) develop a fuller understanding of the current short-term and holiday lets market and (ii) ensure that future policy responses are proportionate and evidence-based. In particular, the purpose of this call for evidence was to gather information that will improve the government's understanding of the benefits and challenges of short-term lets across England as a whole and how they vary across the country. The findings from the call for evidence would help DCMS determine whether there were options the UK government should pursue through a consultation, including alternatives to registration and licensing schemes.

1.4. The call for evidence asked respondents about the following areas:

- changes and growth in the short-term letting market
- benefits of short-term lets
- challenges, including compliance with the existing regulatory framework and housing and community impacts
- the impact of potential policy responses

1.5. However, the scope of the call for evidence did not extend to cover every potential issue related to short-term and holiday letting. For example, the document did not include questions on either the criteria governing when holiday lets become eligible for business rates rather than council tax or related policy areas such as second home ownership. However, if respondents felt that an important issue had not been covered, a 'catch-all' question was included at the end. Furthermore, it is important to note that responses submitted to the call for evidence likely do not provide a fully representative picture of all actors in the sector.

[1] In the rest of the report, we refer to these platforms as "sharing economy-enabled digital platforms".

2. Overview of data and methods

Overview of responses received

2.1. The call for evidence was open to the public and received 5,907 responses in total, either through an online response form hosted on Qualtrics (a widely used online survey platform) or via a dedicated call for evidence e-mail mailbox. The vast majority of responses (95%) were submitted through Qualtrics, while the remaining 5% of responses were submitted via e-mail. Among responses submitted through Qualtrics, we removed incomplete submissions and responses flagged by Qualtrics as spam (if multiple responses had been received from the same IP address within a 12-hour period). This left us with 3,581 responses from Qualtrics as well as 325 e-mail responses to consider in the analysis.

2.2. As part of the call for evidence, respondents could select whether they were answering as an individual or on behalf of an organisation. Out of the 3,906 responses, 3,525 were submitted by individuals and 379 were submitted by organisations.[2] Respondents could also select a respondent type from a dropdown menu (detailed in Table 2 below) or enter their respondent type into a free text field. The most common individual respondent type was a host operating in the short-term and holiday letting market, and the most common organisation respondent type was guest accommodation operators.

Table 1. Breakdown of responses received from individuals and organisations

Respondent type	Qualtrics	E-mail
Individual	3,285	240
Organisations	296	83
Total respondents	3,581	325

Table 2. Breakdown of detailed respondent type

Respondent type	Number of respondents	% of total respondents
Host operating in the short-term and holiday letting market	2,303	59.0%
Member of the public	583	14.9%
Owner / employee of a tourism accommodation business	515	13.2%
Other individual	123	3.1%
Guest accommodation operator	114	2.9%
Short-term and holiday let service company	89	2.3%
Other organisation	72	1.8%
Local Authority	67	1.7%
Tourism Representative Body	17	0.4%
Destination Management Organisation	11	0.3%

[2] Two responses submitted via e-mail did not indicate whether they were responding as an individual or on behalf of an organisation.

Respondent type	Number of respondents	% of total respondents
Marketing / advertising platform	8	0.2%
Government Department or Arms Length Body	3	0.1%
Enforcement agency	1	0.0%

Note: The column "Number of respondents" does not sum to 3,906, as not all responses submitted via e-mail indicated whether they were responding as an individual or on behalf of an organisation.

2.3. Respondents who selected "Other individual" were approximately evenly split between members of the public or hosts operating in the short-term and holiday letting market (some had specified they were only occasional/part-time hosts, though it is unclear why these respondents selected "Other). There were also a very small number of academics and parish/town councillors.

2.4. Among respondents who selected "Other organisations", around one-third identified as parish or town councils. There were also a very small number (fewer than 10) of the following respondent types:

- Commercial associations and membership bodies
- Charities/third sector organisations
- Residents' associations, tenants associations and amenity societies
- Certification bodies.
- Government bodies and joint public-private partnerships (including economic development partnerships)
- A single Member of Parliament

Methodology

2.5. The DCMS online call for evidence was hosted on Qualtrics and consisted of 10 closed-format and 16 open-format questions. Responses could be submitted via Qualtrics or directly to DCMS by e-mail (to a dedicated call for evidence inbox) or post. Responses from DCMS and those sent by e-mail and post were merged into a single, final dataset combining all responses to the call for evidence.

2.6. As is usually the case in calls for evidence of this sort, there were a small number of responses that shared identical or near-identical text (less than 0.5% of responses submitted through Qualtrics). One set of similar responses, all submitted via e-mail (around 25% of total e-mail responses), appeared to be the product of a coordinated campaign as the same template was used in the e-mail attachment. More generally though, it is often difficult to robustly identify whether responses which have multiple sentences in common came from campaigns or individuals and/or groups who informally consulted each other before submitting responses. Due to the small sample sizes involved and to ensure that all responses were considered, responses which were close or exact duplicates were only removed from the thematic analysis (and not the quantitative analysis) presented in the report.

2.7. Descriptive analysis was conducted on the responses to the 10 closed-format questions using a data cleaning and analysis pipeline written in the programming language Python. The main body of this report presents a breakdown of responses to each call for evidence question.

Each question includes a chart that summarises responses as a percentage of all call for evidence respondents who answered the question. The full tables of results for each question are presented in Appendix A.

2.8. For the 16 open-format questions, there was no limit to the amount of text in which respondents could write in their answers. To synthesise important themes/perspectives raised across respondents for each question, we followed a thematic analysis approach based on Braun and Clarke (2006) that involved four phases:

1. Manually reviewing each free-text response to highlight patterns/recurring themes as well as singular cases (ideas/perspectives not raised in other responses).
2. Mapping the qualitative themes to specific components of the call for evidence and developing a narrative description for each theme.
3. Triangulating themes within/across respondents and assessing their substantive significance based on convergence/divergence of perspectives.
4. Identifying any insightful outlier responses that do not fit in with the general emerging themes and analysing patterns of non-responses (if there are any).

2.9. The total number of respondents answering each open-format question is listed at the beginning of each section. This total includes respondents who wrote in “No comment”, “Nothing to add”, “N/A”, etc., though in general these responses made up less than 10% of total responses to open-format questions.

2.10. There were 325 call for evidence responses submitted via e-mail, some of which included PDF attachments. Respondents did not consistently indicate which questions of the call for evidence they were responding to in the e-mails or PDF attachments. We reviewed these responses in full, and themes were assigned to one or more individual call for evidence questions where possible. In the following document, themes are ordered by how frequently they were discussed by respondents (from most to least frequent). In general, the key points and ideas raised in e-mailed call for evidence responses did not differ from those raised in responses submitted via Qualtrics.

2.11. The main body of this report follows the same question order as the call for evidence document, and themes for each open-format question are presented in order of frequency (number of responses that discussed the theme). Specific themes are highlighted if the proportion of individuals or organisations mentioning these themes differs from the overall proportion of individuals which answered the question. In the qualitative analysis, the research team has sought to be respectful of the full spectrum of emotions, views and perceptions expressed within the call for evidence. Written responses were self-selecting, and it is understood that these do not necessarily represent the wider public opinion across England.

2.12. Individual quotes have been used, where appropriate, to illustrate the narrative around specific themes, and quotes were only selected from respondents who provided permission for their views to be published and with any potential identifiers (such as the name of a specific organisation) removed. Quotes were corrected by the research team where there were (i) typos, (ii) references to specific marketplaces/platforms, which were removed and (iii) references to the UK, which were replaced with England, to allow readers to read the views shared uninterrupted. The citation framework for quotes in the body of report uses italicised text and notes whether the response was gathered from an individual or organisation.

Limitations of call for evidence

2.13. Finally, it is important to note that the views shared as part of the call for evidence and summarised in the report represent a very small proportion of the total short-term and holiday lets market. For example, 2,303 respondents indicated they were hosts operating in the short-term or holiday lets market, compared to the estimated 257,000 total short-term and holiday lets in England (from Chapter 3 of the report). In addition, it is possible that hosts who participated in the call for evidence are generally more knowledgeable about their legal obligations and have made active efforts to comply, and the call for evidence is less likely to capture the views of “bad actors” operating in the market who do not comply with their obligations.

2.14. This has two implications for our findings. First, the results and conclusions of the call for evidence are highly unlikely to be representative of hosts and other industry participants as a whole. Second, while anecdotal evidence was frequently shared by respondents on “bad actors”, there is no data that can be used to quantify the scale of regulatory or contractual breaches or how to improve the enforcement of legal obligations.

3. Shape of the market

Question 1: Are you able to provide us with evidence illustrating the size and nature of the short-term and holiday letting market in England and/or its regions, and how that has changed over time?

Key findings

- National data shared by organisational respondents suggests that one plausible estimate for the total number of short-term and holiday lettings in England in 2022 is 257,000. However, this is likely to be an underestimate as the data shared by organisations did not cover all short-term and holiday letting platforms and individual properties could be listed on multiple platforms.
- By averaging national and regional data that was confidentially provided by organisations to DCMS, we estimate that around 70% of total listings are for entire premises, the average booking length is 4-6 days, properties are occupied for less than 30 days each year, and hosts typically earn £6,000 annually.
- The majority of responses to this question were from individuals, who provided data for their own business or discussed their own perceptions about the regional/national size of the sector or trends in their community. However, much of the analysis in this section focuses on organisational responses as they were more likely to provide national, regional or local authority-level market data.

Overview

3.1. There were 2,082 responses to this question (1,867 from individuals and 215 from organisations). Around 80% of respondents provided quantitative data for their individual business/local community (though this data did not always align with the specific metrics set out in Question 1), and 10% of respondents said they could not provide England-wide data or were not aware of any such data source. A very small number of organisational respondents shared England-wide data for the short-term letting market in England. Regional data for Greater London was provided by London Councils, and 23 councils also provided data for their local authority.

3.2. As such, even though the majority of responses were from individuals, much of the analysis focuses on organisational responses, as individual perspectives on the whole of the market vary and organisations were more likely to provide national, regional or local authority-level market data. Due to the lack of an authoritative dataset, we have taken a pragmatic approach in synthesising the small set of England-wide metrics shared by organisational respondents to build an indicative overview of the short-term and holiday lets sector in England in 2022.

Limitations of existing sources of data

3.3. Short-term lets were defined in the call for evidence document as the offering of residential accommodation, including single rooms within shared premises and entire premises, to one or more paying guests. Short-term lets are typically listed on online platforms and include a diverse range of accommodations (including home stays, home swaps, private holiday rentals in cottages, caravans and self-catering apartments, among others).

3.4. However, difficulties defining "short-term" versus "long-term" lets and a fragmented data landscape means that existing estimates of the total number of short-term and holiday lets rely on data from individual platforms or data from third parties that have been scraped from platforms. Both of these data sources also face their own challenges: data from individual platforms does not encompass the entire market and cannot easily be adjusted for multiple listings for a single residence across platforms (addresses are frequently not revealed for a listing until booking or payment confirmation), while data from third parties relies on a "snapshot" approach that cannot completely differentiate between active and legacy listings. Taken together, these challenges mean it is difficult to build an accurate picture of the size and shape of the short-term and holiday lets sector in England, including comparing the relative size of the sector across different regions or quantifying its growth over time.

Summary of organisational responses

3.5. As discussed above, a very small number of organisational respondents shared England-wide data for the short-term and holiday letting market in England. In particular, one organisation used AirDNA data to provide an estimate of the total number of properties listed on Airbnb and Vrbo across the nine regions of England (see Table 3). However, it is important to note that **almost all organisational respondents which provided quantitative evidence in their response, even those providing nationwide data, specifically stated that no data source currently exists that could provide an accurate picture of short-term lets activity in England**. Some also cautioned against using data from external sources (such as AirDNA, GetAgent or CPRE) due to methodological issues such as multiple listings for a single residence or differentiating between active and legacy listings.

3.6. It should be noted that AirDNA data has not been verified by the government nor individual providers, and governmental bodies are citing this data as it is publicly available. According to AirDNA, estimates have likely been between 95% and 99% accurate in the past, depending on the platform whose data was collected[3]. Data sources consist of data scraped from provider platform websites (e.g. Airbnb and Vrbo), which is then combined with partner data.[4]

3.7. England-wide data provided by organisational respondents suggested there were around 197,000 total short-term lets advertised across Airbnb and Vrbo. However, it should be noted that market size estimates vary depending on the data sources, some of which may not have been submitted to this call for evidence. A small number of organisational respondents cited an estimate of 380,000 active Airbnb listings from AirDNA, though this data was from 2019. These estimates contrast with those cited by many individual and organisational respondents of 75,000 self-catering units in England registered for business rates in 2022 and 56,000 self-catering units listed at the Valuation Office Agency. The difference between estimates of the number of properties recorded "business rated: self-catered" and those found on AirDNA was pointed out by a small number of organisations.

3.8. Based on regional estimates provided by the organisational respondent, the greatest concentration of short-term lets listed on major online platforms was in the South West (25%), London (22%) and the South East (17%), while the East Midlands (5%) and the North East (4%) had the lowest concentration of short-term lets.

[3] https://www.airdna.co/airdna-accuracy

[4] https://www.airdna.co/airdna-data-how-it-works

Table 3. Estimated number of short-term and holiday lets overseen by major platforms in England, by region

Region	Estimated listings	% of total listings	% of total dwellings[5]
South West	48,600	25%	2%
London	43,200	22%	1%
South East	34,400	17%	1%
North West	16,100	8%	1%
Yorkshire and the Humber	14,500	7%	1%
West Midlands	13,300	7%	1%
East of England	10,400	5%	0%
East Midlands	9,700	5%	1%
North East	7,000	4%	1%
Total listings	**197,200**	**-**	**1%**

Source: Analysis provided by an organisational respondent to this call for evidence, based on AirDNA data. This data is publicly available and has not been verified by the government.

3.9. This organisational respondent also carried out an analysis of self-catering establishments not listed on sharing economy-enabled digital platforms:

Table 4. Estimated number of short-term and holiday lets in England not listed on sharing economy-enabled digital platforms, by region

Region	Estimated listings	% of total listings
South West	23,600	40%
North West	9,300	16%
South East	8,600	14%
Yorkshire and the Humber	5,200	9%
East of England	4,700	8%
East Midlands	4,200	7%
North East	1,900	3%
West Midlands	1,900	3%
London	200	0%
Total listings	**59,600**	

Source: Analysis provided by an organisational respondent to this call for evidence, using 2016 VisitEngland Stock Audit data adjusted for changes in non-serviced accommodation volumes since 2016.

[5] https://www.gov.uk/government/statistical-data-sets/live-tables-on-dwelling-stock-including-vacants (table 109, 2021 data)

3.10. Taken together, this indicates there were around 257,000 short-term and holiday lettings in England in 2022. This is likely to be an underestimate for two reasons: (i) AirDNA data cited by organisations only focused on Airbnb and Vrbo, while no organisations cited data from other platforms such as Booking.com, Housetrip or Tripadvisor, and (ii) the number of short-term lets for London is likely to have grown disproportionately faster since the 2016 VisitEngland Stock Audit than other regions in the UK.

3.11. Organisational respondents also provided other metrics illustrating the size and nature of the short-term and holiday letting market in England. Where possible, these have been presented as ranges of point estimates rather than a single average estimate for each metric, as we could not independently verify if multiple estimates for the same metric were calculated using the same methodology (due to a lack of methodological detail in responses).

Table 5. Other England-wide market metrics reported by respondents

Metric	Value
% of total listings for entire premises	69-76%
Average booking length	3-4 days
Occupancy rates	25-30 days per year
Average revenue for owners	£5,000-£6,000
Average number of properties listed by hosts	1-2 properties
Average size of listings	2-3 rooms
Average group size	2-3 people

Source: Range of quantitative metrics provided by sharing economy-enabled digital platforms responding to the call for evidence. [6]

3.12. Respondents largely reported their personal experiences and observations of growth in the market over time. This was attested by individual respondents as well as organisations. However, we could not estimate the increase in listings in England over time as no respondents provided time series data specifically for the call for evidence (all data submitted to DCMS was snapshots of specific years). [7]

3.13. In terms of the sector's total economic impact in the UK, one organisation shared an Oxford Economics report estimating this to be £27.7 billion in contribution to GDP and around 500,000 jobs in 2021.

Regional case studies

3.14. In the absence of a national dataset, some councils, in particular those in communities with a high concentration of short-term lets, have taken their own steps to build local datasets based on AirDNA or other third-party data. These responses all included an estimate of the

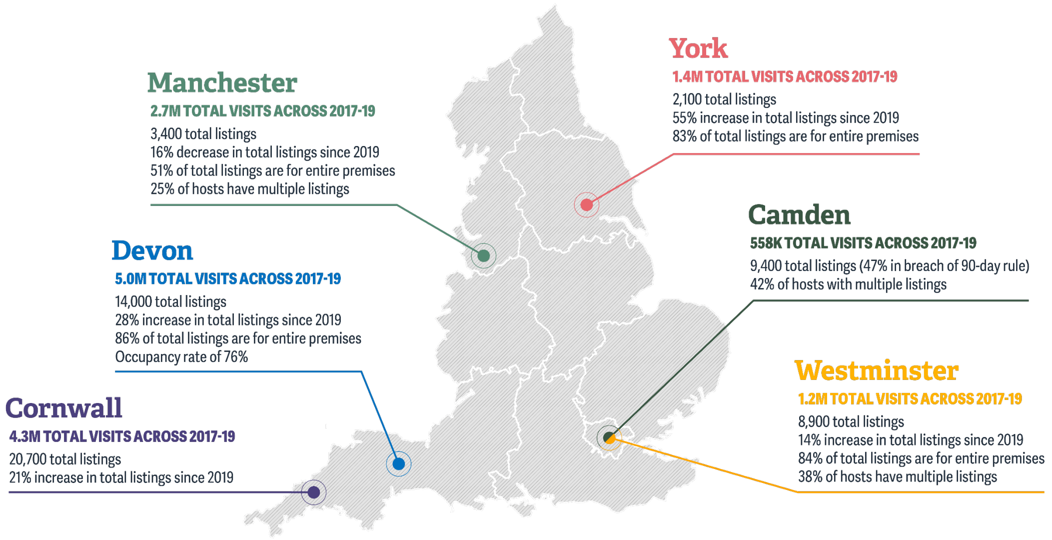
[6] Other organisations (such as those listing properties in Table 4) may have significantly different business models: for example, one such organisation noted in their response that owners let their property for an average of 25 weeks per year and often take direct bookings on top of this; metrics such as the average size of listings, average booking length, average group size or average revenue for owners are not necessarily applicable to properties not listed on sharing economy-enabled digital platforms.

[7] Time series analysis is possible in theory: for example, Inside Airbnb has published quarterly data on listings for the past 12 months. However, our analysis of Q1 only reflects data shared by respondents as part of the call for evidence and does not include any analysis of the broader data landscape.

total number of local short-term and holiday lets, with some responses also including a wide range of additional metrics (which were not consistently reported). While data was shared by 23 local authorities in addition to Greater London, the map below summarises key findings from six councils: Cornwall, Devon, Manchester, York, Westminster and Camden.

3.15. It is important to note that the data provided by these councils is highly unlikely to be representative of local authorities across England, as taken together Tables 3 and 4 suggest that short-term and holiday lets are disproportionately likely to be located in the South West and London. In addition, because data sources and specific analytical methodologies are likely to be different across local authorities (we could not independently verify the estimates provided due to lack of details provided in organisational responses), the specific metrics listed should not be used for comparison between local authorities.

Short-term and holiday letting market in England: Regional case studies



Summary of individual responses

3.16. The call for evidence did not include a question about where respondents lived or where their short-term let was located. An analysis of place names included in responses suggested that more than 75% of respondents to this question who identified as hosts had short-term lets in high-tourism areas (such as Devon, Cornwall, the Cotswolds, the Peak District, the Lake District or seaside towns such as Bournemouth). In addition, more than half of respondents who identified as members of the public stated in their response that they lived in these or other similar high-tourism areas.

3.17. Individual responses to this question included a broad range of metrics for the respondent's own short-term or holiday let.

> *"I am open all year and have between 75-80% occupancy with many mid-week lets of three /four days. My guests come for a variety of reasons, to visit Oxford, meet up with family or friends. I also have a steady stream of overseas guests. Rental charges vary across the year but average about £120-£150 a night."* (Individual respondent)

> *"I am an individual host with one double ensuite room to let. I have visitors on business (contractors, visitors for meetings, nurses wanting to stop over rather than drive long distances home in between shifts). I rarely have long term lets, although very rarely get a*

> *whole month booking. There are sometimes regulars who book 2 or 3 days a week for several weeks at a time. This income varies year to year and obviously during COVID there was no income. I use the income to overpay my mortgage and make improvements on my house."* (Individual respondent)

3.18. In general, individuals were evenly divided over whether their own short-term let had increased in popularity or if bookings had remained consistent from year to year. A small proportion of respondents (around 10%) included individual perceptions and guesses about the size of the sector per region or nationally: some noted that demand had sharply fallen due to the Covid-19 pandemic while others felt that the number of short-term lets in their community had increased.

> *"I can only comment on one small flat in Cornwall over the last 10 years or so. My impression would be that bookings are being made further in advance now, and cover more of the winter months now than previously, as well as spring and summer, i.e. it has become a more popular destination."* (Individual respondent)

4. Benefits of letting

Question 2: What do you consider to be the main benefits of short-term and holiday letting for:

a) Homeowners

b) Consumers

c) Businesses and the wider economy

Key findings

- For homeowners, the most commonly-discussed benefits were additional income and greater flexibility around how their properties were used.
- For consumers, the most commonly-discussed benefits were greater value-for-money, choice and flexibility in finding holiday accommodation that met their needs.
- For businesses, the most commonly-discussed benefits were the positive impacts of tourist spending on local employment.

There were 3,058 responses to this question (2,812 from individuals and 246 from organisations). Within each category (homeowners, consumers, businesses and the wider economy), the key themes raised in responses are detailed below in order of highest to lowest frequency within the responses.

Benefits for homeowners

Additional income

4.1. Among the benefits identified for homeowners, the most frequent theme (raised by more than 75% of respondents) was the additional income from short-term lettings. For instance, respondents describe the benefits of a flexible additional income source, either during their retirement, or as an income boost during the cost-of-living crisis. Several respondents also noted that their property was not as suited for long-term lets (due to the financial costs, small size of property, or inability to get planning permission for use as a permanent residence, for example) which makes them a welcome additional income source to owners as short-term rentals.

4.2. Oftentimes, respondents explain that they are using their second homes as an additional source of revenue while occupying it for part of the year themselves. Furthermore, letting out second homes is understood to reduce the tax burden on such houses which benefits owners' overall income.

> *"The rules of long term rentals have become so difficult for the owner with difficulties getting tenants to leave, open ended tenancy agreements etc. Short term letting provides a flexible let where the owner knows the let is for a fixed short term with the renter having no rights to stay and the owner able to use the accommodation for their own use at short notice if they wish."* (Individual respondent)

> *"The principal benefit for homeowners is the ability to supplement your income. As pensioners this is very welcome. We earn £6-7000 per year through renting out a room in our house with an attached kitchen."* (Individual respondent)

Flexibility

4.3. The second most used theme (raised by around 40% of respondents) surrounded the flexibility that holiday letting affords them. Individuals explain that letting out their (second) homes allows them to travel flexibly and gain a seasonal income whenever they choose, as well as benefits of being self-employed and running a small private business with holiday lets. Furthermore, this allows to adjust for health conditions of owners or flexibly choosing between occupying properties themselves and renting them out.

> *"The growth of platforms […] meant that homeowners are easily able to access more flexible use of their properties. […] This allows for a more efficient use of the property, using space that would otherwise be empty or underused and enabling the homeowner to earn some additional income. This could be particularly useful for someone living in an area of high housing costs or seeking to supplement income from a pension."* (Organisational respondent)

> *"The letting market offers an opportunity to diversify savings whilst providing a flexible source of income and work, which fits with family life. […] On a personal level, it has enabled us to holiday at our property with our autistic son without the stress of unfamiliar surroundings."* (Individual respondent)

Benefits for consumers

Choice and flexibility

4.4. Among consumers, a different set of themes describing benefits from short-term lets were identified. Most frequently, the possibility to choose locations freely given the large and widespread supply were identified (by around two-thirds of respondents). Large groups or multi-generational families are thus more likely to find a well-suited holiday home, according to respondents. Moreover, a larger number of accommodation options also provides more accommodation options for different budgets and, thus, allows greater choice. Similarly, issues of privacy are mentioned which allow visitors to make such choices independently and without having to rely on hotels or B&Bs. Especially during the Covid-19 pandemic, staying in individual houses and reducing the risk of mixing with people outside one's group were perceived as important benefits.

4.5. Additional benefits outlined are sustainability and accessibility. Being responsible for one's own waste management and a larger offer of properties across England, respondents feel this allows for "greener" holidays and greater sustainability. On accessibility, greater choice and flexibility are understood as beneficial to visitors with special needs.

> *"Consumers enjoy comforts and privacy that self-contained holiday lets offer. Holiday lets can offer a cheaper alternative to serviced accommodation in some cases. Also seen as an opportunity to try something different that you don't have at home like a wood burner or en-suite."* (Organisational respondent)

> *"Post the Covid pandemic, many families and small groups chose to book accommodation where they were the only groups staying and did not need to mix with others. Many*

> *consumers view self-catering as a lower impact, greener alternative when booking accommodation, and can offer more options when there is high demand in an area, major sporting or cultural events would be an example."* (Individual respondent)

Value for money

4.6. The second most frequent theme (raised by around one-third of respondents) emphasised greater value for money, given larger and more varied supply as well as variable service provisions at short-term lets. Respondents argue this allows them to choose low-budget accommodation freely if this is what they are seeking, or to share holiday homes with a greater number of people. Furthermore, it allows people to cook meals at home and further reduce travel costs.

> *"Short term lets offer good value for money, all year round. […] It is often a more economical option, allowing guests to cook at home for all meals if they wish. The familiarity and privacy offered by self-catering can make for a significantly more relaxing holiday, in particular for families with children with additional needs where a hotel or alternative type of accommodation would add significant stress."* (Individual respondent)

> *"There will be properties that cost considerably more than this and many that charge much less, so properties to suit all budgets."* (Individual respondent)

Benefits for businesses and wider economy

Tourist spending and local employment

4.7. Asked about benefits for businesses and the wider economy, the most commonly mentioned theme (by around 30% of respondents) was the benefits of tourist spending and the positive impact this has on local employment. Several residents explained that their local economy was highly dependent on the tourism industry. Consequently, short-let visitors are crucial for the local economy such as pubs, restaurants, local stores, outdoor activities, or local sights.[8] When running short-term rentals, many owners draw on local workers for the running and upkeep of the property. Examples include cleaners, maintenance staff, gardeners, solicitors, or local agents responsible for administering the property.

> *"An important contribution to a successful visitor economy, particularly in rural and coastal areas which tend to be economically deprived. Also supports local services for those communities; business which might otherwise not be viable like shops and pubs."* (Individual respondent)

> *"We paid around £11k in commission to a local letting agency who provide local staff with employment and around £13k to a local housekeeping / cleaning company. We also purchased local goods including local coffee and biscuits for inclusion in the welcome basket for guests."* (Individual respondent)

[8] On the other hand, in their responses to Questions 6-8, a smaller number of individuals mentioned anecdotal evidence that tourists using short-term lets were ordering large grocery deliveries and cooking at home instead of spending money at local supermarkets/restaurants.

5. Compliance with regulations

Question 3: How do you assess levels of compliance with regulations on:
a) Fire safety
b) Gas safety
c) Health and safety
d) Food and drink
within the short-term and holiday letting market in England?

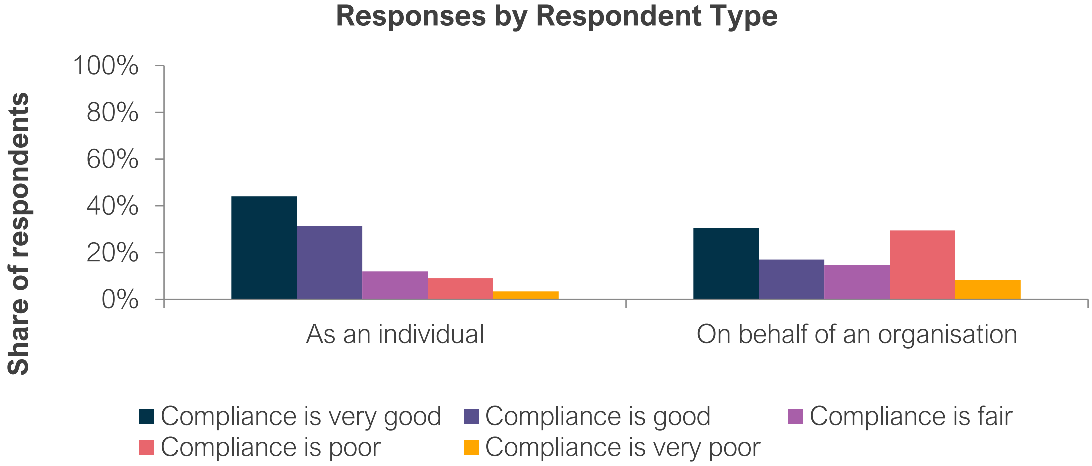
Key findings

- Almost all respondents raised similar themes across all four questions. Respondents were most likely to acknowledge or discuss their own personal efforts to comply with regulations.
- A smaller number of respondents expanded on their answer to discuss potential reasons for lack of compliance (either the potential lack of awareness of requirements by many owners or anecdotal evidence around efforts to actively ignore or circumvent regulations).

Quantitative analysis

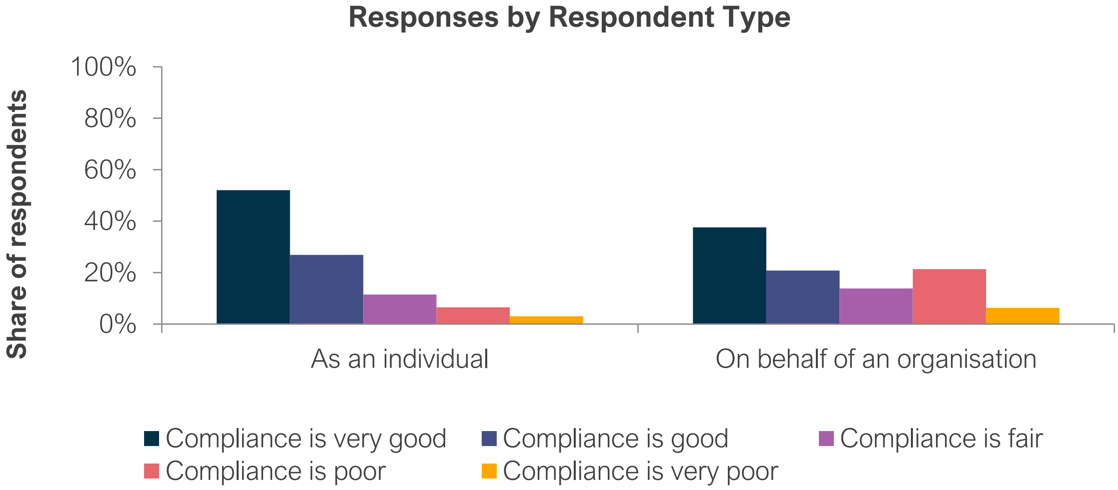
Fire safety

5.1. There were 2,533 responses to this question (2,326 from individuals and 207 from organisations). Out of all respondents, 75% said that compliance was very good or good, 12% said that compliance was fair and 15% said that compliance was poor or very poor. Among respondent types, hosts were most likely to respond that compliance was good or very good (84% of respondents), compared to 63% of respondents who were members of the public or owners/employees of tourism accommodation business. Among organisations, local authorities were least likely to respond that compliance was good or very good (10% of respondents), followed by tourism representative bodies (33% say compliance is good or very good). 48% of guest accommodation operators and 54% of short-term and holiday let service companies found compliance to be good or very good.



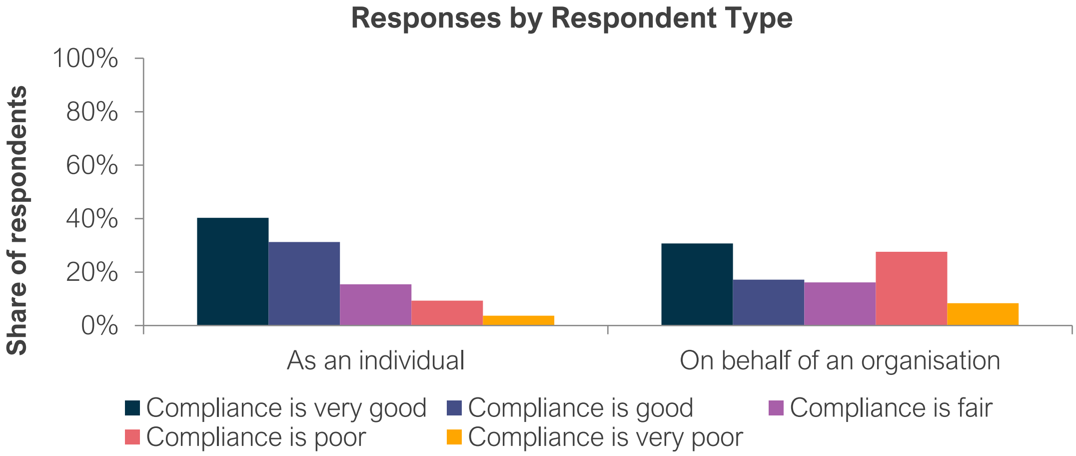
Gas safety

5.2. There were 2,035 responses to this question (1,862 from individuals and 173 from organisations). Out of all respondents, 77% said that compliance was very good or good, 12% said that compliance was fair and 11% said that compliance was poor or very poor. Among respondent types, hosts were most likely to respond that compliance was good or very good (85% of respondents), compared to 70% of respondents who were members of the public. Short-term and holiday let service companies were the organisational respondent type most likely to say that compliance was good or very good (66%). Local authorities were least likely to respond that compliance was good or very good (11%).



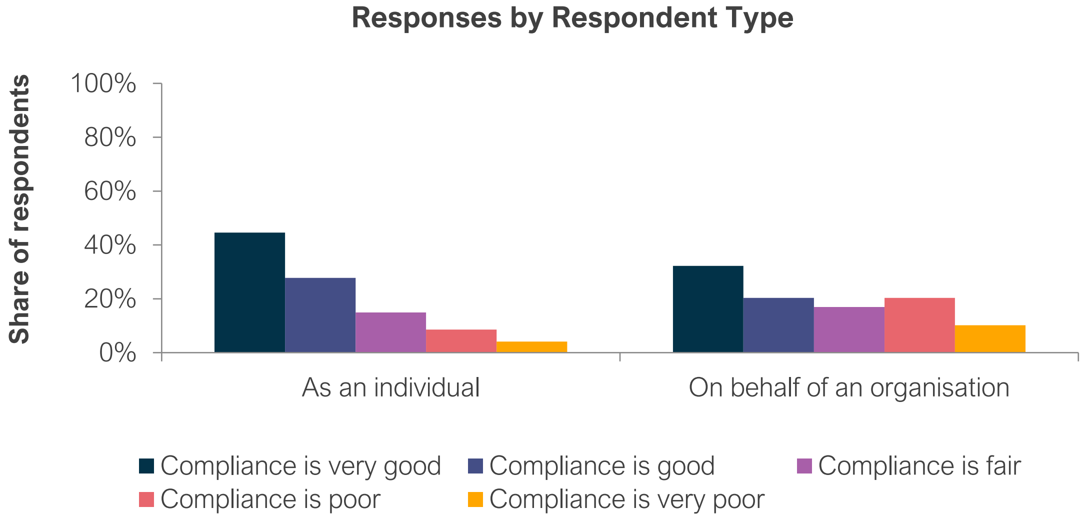
Health and safety

5.3. There were 2,336 responses to this question (2,144 from individuals and 192 from organisations). Out of all respondents, 70% said that compliance was very good or good, 15% said that compliance was fair and 15% said that compliance was poor or very poor. Among respondent types, hosts were most likely to respond that compliance was good or very good (76% of respondents), compared to 64% of respondents who were members of the public. Only 45% of guest accommodation operators and 28% of destination management organisations and responded that compliance was good or very good. No local authority reported good or very good compliance; instead, 75% reported poor or very poor compliance levels.



Food and drink

5.4. There were 1,331 responses to this question (1,213 from individuals and 118 from organisations). Out of all respondents, 70% said that compliance was very good or good, 15% said that compliance was fair and 15% said that compliance was poor or very poor. Among respondent types, hosts were most likely to respond that compliance was good or very good (79% of respondents), compared to 68% of respondents who were members of the public. Short-term and holiday let service companies were the organisational respondent type most likely to say that compliance was good or very good (61%). No respondents who identified as local authorities responded that compliance was good or very good.



Qualitative analysis

5.5. Respondents were also asked to provide any comments on their response. There were 2,638 responses to the open-format question on fire safety (2,415 from individuals and 223 from organisations), 2,369 responses on gas safety (2,184 from individuals and 185 from organisations), 2,204 responses on health and safety (2,024 from individuals and 165 from organisations) and 1,934 responses on food and drink (1,754 from individuals and 180 from organisations).

5.6. In general, respondents raised similar themes across all four questions (responses largely were framed in general terms and did not make specific references to fire safety, gas safety, health and safety or food and drink except when compliance with specific regulations was acknowledged). The largest proportion of respondents on questions 3(b) and 3(d), even for those who answered that compliance was poor or very poor, said they did not offer gas (or there was no gas supply) or did not serve food or drink (without providing supporting evidence for their quantitative response). In addition, almost all local authorities responding to this question said they were not able to comment due to lack of proactive monitoring/data collection, inability to identify short-term lets and/or the limited number of public complaints received.

5.7. The key themes raised in responses are detailed below in order of highest to lowest frequency within the responses.

Individual efforts to comply

5.8. The most common theme raised by around two-thirds of respondents was their own personal efforts to comply as hosts or at their workplace. Fire, carbon monoxide, and smoke detectors, safety inspections, guidance from professional bodies and letting agency requirements were mentioned as important elements of compliance.

> *"We operate with a high degree of compliance with such regulations […], including annual gas safety inspections, pat testing, fire regulation compliance (including all relevant detectors), annual chimney sweeping, etc. However, we believe that overall compliance is poor in the wider, unregulated marketplace."* (Individual respondent)

> *"I complete an annual Fire Safety and Health and Safety Survey. (I am the Fire Master.) Every potential danger is listed and actions recorded. Smoke, heat and carbon monoxide alarms throughout the property and two types of fire extinguishers provided on both floors, back and front of house. […] Professional advice was sought and acted upon."* (Individual respondent)

Lack of awareness of safety requirements

5.9. The second most common theme raised by around 20% of respondents was the lack of awareness of safety requirements by many owners running short-term lets (as distinct from conscious avoidance). This theme was most commonly raised for food and drink, followed by health/safety and gas safety. In In general, these respondents structured their answer by first stating their personal compliance with regulations before commenting on insufficient compliance more widely across the sector. Respondents suggested this might stem from lacking information that owners were neither actively seeking out nor rules imposed on them by online rental platforms (as these properties had been originally set up for domestic use). They emphasised that if licensing schemes were to be implemented, educating hosts and checking implementation before welcoming any guests would be compulsory.

> *"We believe that overall compliance is poor but this [is] because of a lack of knowledge about the requirement for compliance rather than a resistance to comply. If advertising platforms highlighted the requirements, then compliance would be far greater."* (Organisational respondent)

> *"We are certain that many of those renting on a short-term basis have no idea of their responsibilities […]. With the ability for any member of the public being able to list their properties themselves on a variety of websites, without checks taking place that legal compliance is in place, it is very easy for the legalities to be side stepped without agency controls."* (Individual respondent)

Avoidance of safety measures

5.10. The third most common theme raised by around 10% of respondents was concern that individuals and agencies were actively ignoring and circumventing safety measures. Similar to the theme of "Lack of awareness of safety requirements" discussed above, respondents generally structured their answer by first stating their personal compliance with regulations before criticising insufficient compliance more widely across the sector. While few could provide more than anecdotal evidence to support their claims, many of these respondents, in particular guest accommodation operators and short-term/holiday let service companies, contrasted the accreditation and knowledge required to let properties with established letting agencies with the more "casual" nature of short-term lets (though it is important to note that all major sharing economy-enabled digital platforms have published safety standards and set out policies to take appropriate action when evidence of non-compliance with relevant statutory and regular requirements was found). A very small number of respondents theorised about the underlying motives (to reduce costs) or stated their personal efforts to comply left them feeling disadvantaged.

> *"Those of us who take all of the above issues seriously and spend the money necessary to comply with existing legislation feel disadvantaged compared with those who get away with sidestepping the issues."* (Individual respondent)

> *"We invest a lot of resource supporting our owners to ensure their properties are legally compliant and safe for guests. All new owners must provide proof of their legal and safety compliance before we market their property and allow guests to stay. […] We are aware that not all agencies, platforms, owners are as diligent as we are. This is knowledge gained through anecdotal conversation with new properties joining our portfolio from other agencies/platforms with a lack of compliance documentation."* (Organisational respondent)

> *"Professional serious operators are well aware of requirements - advice given from Visit England and PASC.[…] Amateur operators are the risk - they can just list without really understanding what they need to do - they can just tick a box to say they have complied."* (Organisational respondent)

6. Breach of contractual agreements

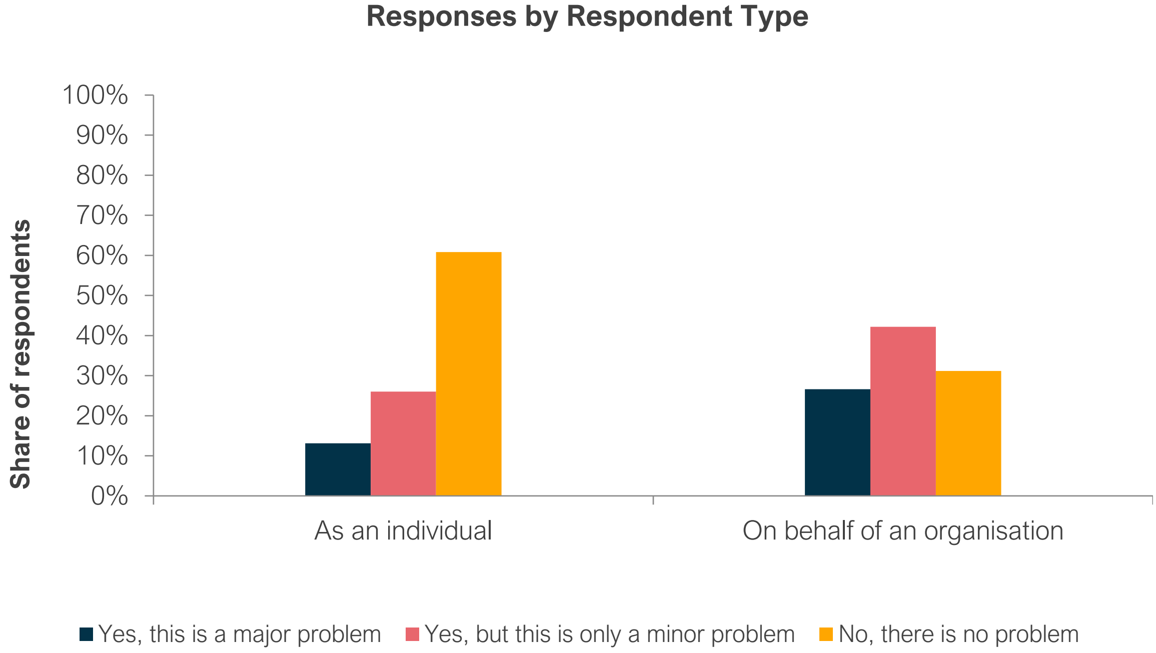
Question 4: Do you consider there to be a problem with breach of contractual agreements in the short-term and holiday letting market in England?
If so, why?

Key findings

- As with question 3, most respondents discussed their personal efforts to comply or broader compliance rates across the sector, though some also noted that it would be difficult to track contractual breaches due to insufficient data or monitoring.
- A smaller proportion of respondents said that some owners were consciously breaching contractual agreements, in particular tenancy contracts, planning restrictions or changes of use.

Quantitative analysis

6.1. There were 1,715 respondents to this question (1,568 from individuals and 147 from organisations). Out of all respondents, 14% said that breach of contractual agreements was a major problem, 27% said it was a minor problem and 59% said it was not a problem. Among respondent types, hosts were least likely to respond that breach of contractual agreements was a major problem (7% of respondents find this to be a major problem), compared to 31% of those who responded as members of the public. Short-term and holiday let service companies were the organisational respondent type least likely to say that breach of contractual agreements was a major problem (17%). In comparison, 60% of local authorities said that breach of contractual agreements was a major problem.



Qualitative analysis

6.2. Respondents were also asked to provide any comments on their response. There were 1,633 responses to this open-format question (1,482 from individuals and 151 from organisations). Around 60% of all respondents who answered this question provided very short answers stating breaches of contractual agreements were not a problem or not relevant to them.

6.3. The key themes raised in responses are detailed below in order of highest to lowest frequency within the responses.

Active efforts to comply

6.4. The most commonly raised theme (by around 15% of respondents) was emphasis of either their personal efforts to comply or positive attempts across the wider sector. Respondents frequently referred to health and safety compliance, especially fire safety, PAT [portable appliance testing], water safety, as well as public liability insurance. Other contractual breaches mentioned included mortgage conditions or other property letting restrictions, for example for council and social housing. A few respondents noted that compliance efforts were motivated by their personal convictions (rather than existing rules), while others cited the Pink Book as a source of information on compliance.[9]

> *"[…] we are compliant as regards health and safety issues and we use the Pink Book and information from our professional body PASC […]. We have Public Liability insurance and have external bodies who do an annual independent check of all our key health and safety areas."* (Individual respondent)

> *"As an agent, we ensure that properties are compliant with regards to health and safety, fire risk assessments, and gas/boiler checks."* (Organisational respondent)

Circumventing contractual measures

6.5. The second most frequent theme (raised by around 15% of respondents) was claims or anecdotal evidence that some short-term let owners were consciously circumventing rental contracts and other agreements. Respondents report in particular that short-term lets were in violation of tenancy contracts, planning restrictions, or changes of use. Further problems flagged include basic health and safety requirements or breaches of home insurance policies.

> *"I suspect there are hosts who have not confirmed the details to their mortgage company and freeholder. However I have seen little resistance from lenders and freeholders as this has become a recognised path for owners."* (Individual respondent)

> *"[…] the likelihood of deliberate breaches and the bending of rules is almost certainly being under reported. Breaches of planning restrictions, changes of use etc. are also significant."* (Organisational response)

[9] The Pink Book is a publication by Visit England outlining regulatory requirements and guidance for accommodation providers and attractions in England.

Difficulty quantifying the size and scope of breaches

6.6. The third most frequent theme (raised by fewer than 10% of respondents) focused on how difficult it is to measure contractual breaches, with respondents stating they did not have sufficient knowledge to provide an answer or that non-compliance was unlikely to be detected. Insufficient data on the size of the sector as well as lacking monitoring and enforcement was perceived as a substantial problem which makes precise estimates of contractual breaches difficult or impossible.

> *"[…] this will certainly be a major problem, but as we do not know where STLs are located, who owns them, and how often they are let, there is no effective way to regulate these types of contractual breaches. As an illustrative example, to sub-let a subsidised or social home is actually illegal, and councils invest time and resources in preventing it."* (Organisational respondent)

7. Other issues with awareness, compliance and/or enforcement

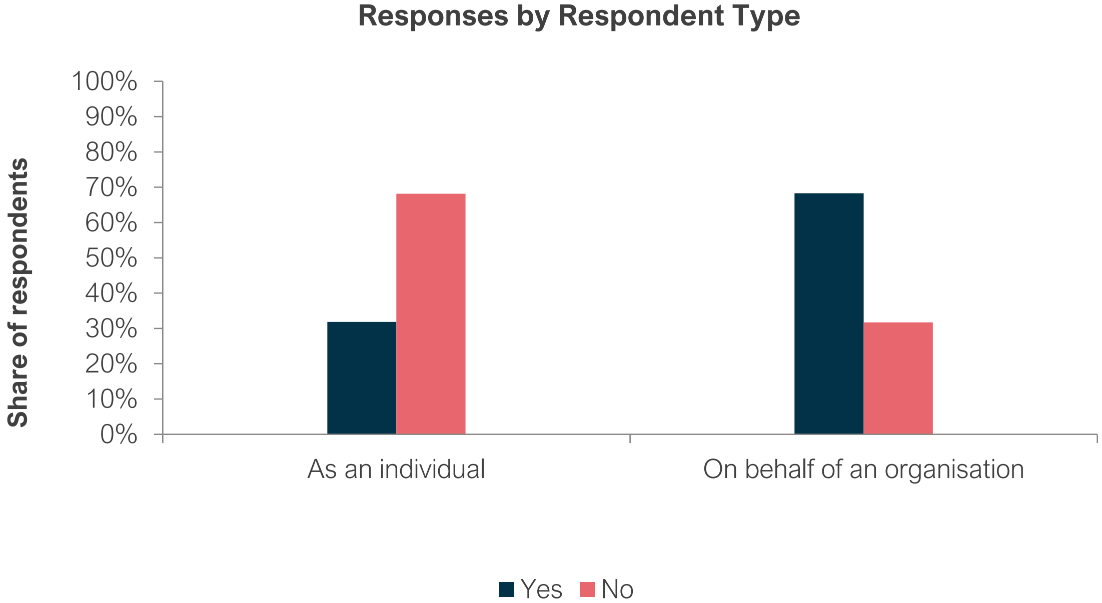
Question 5: Do you consider there to be other legal provisions concerning the supply of short-term and holiday letting to paying guests which are not covered elsewhere in this call for evidence but where there are issues with awareness, compliance and/or enforcement?

Key findings

- The largest share of respondents raised concerns about health and safety, in particular lack of clarity over responsibility for safety matters and the absence of a dedicated monitoring and enforcement entity
- Other respondents also discussed potential improvements to registration and licensing as well as the importance of introducing taxes for short-term and holiday lettings.

Quantitative analysis

7.1. There were 1,577 respondents to this question (1,443 from individuals and 134 from organisations). Out of all respondents, 34% said that there were other legal provisions not covered elsewhere in the call for evidence but where there are issues with awareness, compliance and/or enforcement, and 66% said there were no other such legal provisions. Among respondent types, hosts were least likely to answer “Yes” (24% of respondents), compared to 38% of respondents who were members of the public. Just over half of short-term/holiday let service companies answered “Yes” (51% of respondents), while 73% of guest accommodation answered “Yes”. All but one local authority (93%) answered “Yes”.



Qualitative analysis

7.2. Respondents were also asked to provide any comments on their response. There were 902 responses to this open-format question (775 from individuals and 127 from organisations). Around 40% of respondents did not answer the question and instead expressed general views around a potential registration scheme or the short-term lets market, and these respondents are excluded from the analysis below.

7.3. The key themes raised in responses are detailed below in order of highest to lowest frequency within the responses.

Health and safety

7.4. The most common theme (raised by around 30% of respondents) was concerns over general health and safety risks. These included a broad range of specific issues, such portable appliance testing, Legionnaires' disease, water quality and sewage treatment, among others. Respondents concurred that while awareness varies widely, compliance and enforcement were highly insufficient. These respondents felt that this issue stemmed from lack of clarity over who is responsible for safety matters – owners, online platforms, or a combination of both. Other respondents also commented on the absence of a dedicated monitoring and enforcement entity.

7.5. Some respondents also expressed fear of incurring additional costs by way of being compliant which made them feel unfairly disadvantaged. Suggestions for change encompassed a stricter licensing system which approves and checks health and safety provisions of short-let properties.

> *"The level of understanding of the requirements for things like operating and maintaining hot tubs is truly appalling, despite the fact that the potential consequences of mismanagement are severe and possibly life-threatening. They [online platforms] clearly state that any problems resulting with the property are with the owner and not with themselves. Consumers booking on these websites will be expecting […] steps to ensure that properties do meet health and safety legislation, and not to wash their hands should any problems arise."* (Individual respondent)

> *"Sewage treatment for cess pits, sewage treatment plants, septic tanks, the regulations changed in 2015. We have ours serviced and inspected every 6 months."* (Individual respondent)

Planning, licensing, and registration

7.6. The second most frequent theme (raised by around 20% of respondents) indicated the need for improvements to registration and licensing of short-term lets, in particular around planning law/status. Respondents share the understanding that licensing and planning requirements would allow local authorities to set a cap to short-term lets per number of residents to prevent adverse impacts on local communities. This could also prevent housing progressively being converted into short-term lets which intensifies local housing crises in many holiday hotpots.

> *"Planning Law needs to be clear and not so grey about changes of use. It should be an automatic requirement that flats sharing a communal entrance require planning permission not left to deliberation and notional occupancy rates with the 'unless' caveat. Council Tax*

> *needs to be consistent and not provide loopholes for holiday let businesses to benefit from SME allowances and relief." (Individual respondent)*

7.7. Respondents also emphasise that such registration requirements would contribute to better data availability for the sector which, many argue, would help informed policy-making.

> *"By requiring all holiday accommodation or short let providers to register, local authorities would be able to ensure that accommodation reaches a required level which might be graded in a similar manner to hygiene ratings. They could also raise or lower the number of permissions granted in order to reflect local conditions. In some areas more supply might be desirable; in others, […] the seemingly ever-expanding number could be curtailed."* (Individual respondent)

Taxation

7.8. The third most often recurring theme, particularly raised by local authorities, highlighted the perceived need for taxation of short-term let properties. Respondents mention a lack of taxation of both (second) homeowners and visitors. It is perceived as unfair for short-term lets to be exempt from council tax payments despite benefiting from local services and infrastructure, meanwhile business rates are understood to be circumvented by most owners. Responses suggest this money should be used for purposes beneficial to the local communities and to fund any forthcoming registration or licensing scheme.

> *"The responsibilities for homeowners offering 'holiday lets' and 'short-term' letting to contribute to local council taxes are often neither clear nor enforced. This makes such services as refuse collection which is fully paid for by residents via their Council Tax available at no charge to non-residents."* (Organisational respondent)

> *"Many if not most of these holiday-let premises are businesses and should pay business rates but, because they are small businesses, they avoid this contribution to local services and gain an unfair advantage over hotels and the like."* (Individual respondent)

8. Consequences for the housing market

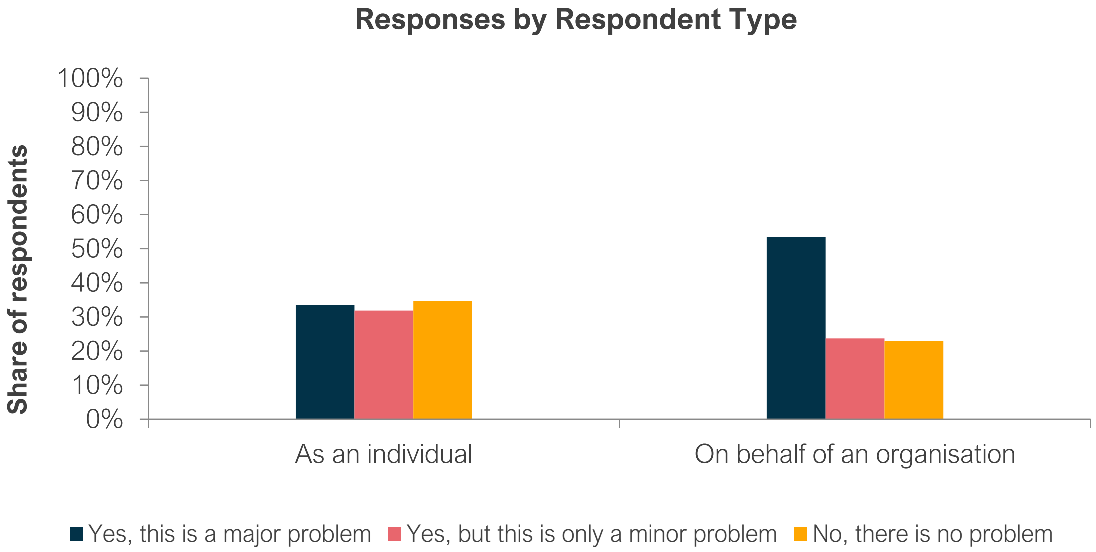
Question 6: Do you consider the increase in short-term and holiday letting in England to have had adverse consequences on the housing market?

Key findings

- The largest proportion of respondents raised concerns around the potential impact of short-term lets on the rental market, including local housing being converted to short-term lets, evictions, and termination of rental contracts. Respondents particularly emphasised worries about housing prices.
- No quantitative evidence on changes in housing availability or prices was received as part of the call for evidence. Some respondents cited past reports detecting a small impact on housing supply and prices through short term lets.
- Respondents also highlighted variation in housing market impacts across regions, with the largest impacts in less-populated tourist destinations.

Quantitative analysis

8.1. There were 2,902 respondents to this question (2,654 from individuals and 248 from organisations). Responses were close to being evenly split between the three answer options. Out of all respondents, 35% said that the increase in short-term and holiday letting in England was a major problem for the housing market, 31% said it was a minor problem and 34% said it was not a problem. Among respondent types, hosts were least likely to respond that this was a major problem for the housing market (23% of respondents), compared to 57% of respondents who were members of the public. Short-term and holiday let service companies were the organisational respondent type least likely to say that the increase in short-term and holiday letting in England was a major problem (20%). In comparison, 83% of local authorities said that this was a major problem, in addition to 49% of guest accommodation operators.



Qualitative analysis

8.2. Respondents were also asked to provide any comments on their response. There were 2,442 responses to this open-format question (2,235 from individuals and 207 from organisations). The key themes raised in responses are detailed below in order of highest to lowest frequency within the responses.

Housing availability

8.3. Respondents' foremost concern (raised by around half of respondents) surrounded the issue of housing availability and the impact that increases of short-term lets had on the rental market. A widely felt perception consisted in local housing being incrementally converted into short-term lets which is often more profitable for owners than long-term lets, despite lower occupancy rates. Some respondents report evictions and termination of rental contracts as a consequence of landlords wanting to convert their housing stock into holiday accommodation. This problem is brought up as a highly locally concentrated difficulty in tourist hotspots, especially in counties such as Devon, Cornwall, or Yorkshire. (see theme 4: regional disparities).

8.4. Additionally, responses highlight that housing availability is especially negatively affected by entire properties being let out (data from responses to Q1 suggests entire properties comprise between 69-76% of the total market), in contrast to some owners sub-letting individual rooms in their otherwise owner-occupied houses. In the case of the former, even if only let out for several weeks per year, respondents describe it as unlikely that a local family will be able to be permanent residents in such properties. For the latter, this is highlighted as not displacing local families but instead providing a workable opportunity for local families to earn some additional income. Most respondents do not quote specific data or other quantitative evidence on housing availability but instead rely on personal experience and perceptions.

> *"Taking long-term rental properties out of the market and also the acquisition, by people with ample funds, of a house as an investment, rather than as a home, create a shortage of housing for rent or for purchase as sole residence."* (Individual respondent)

> *"London is experiencing an acute housing shortage. The London Plan states that 66,000 new homes need to be built every year for 10 years to meet the needs of Londoners (GLA, 2021) […] In December 2019 Airbnb listings of entire homes was equivalent to 1.2% of the total housing stock of London. However, this proportion was far higher in central London, with Airbnb lettings accounting for 5.4% of housing stock in Westminster, 5.3% in the Royal Borough of Kensington and Chelsea and 3.6% in Tower Hamlets (GLA, 2020)."* (Organisational respondent)

House prices

8.5. Closely related to the issue of housing availability, the second most frequent theme (raised by around one-third of respondents) was the perceived increase in housing prices. Almost no respondents supported their claims with quantitative evidence, though two organisational respondents cited a 2019 Oxford Economics report finding short-term lets density was a relatively small driver of growth in house prices in the United Kingdom before the Covid-19 pandemic. For these respondents, the price increases would price out low-income groups such as young families, first-time home buyers, and people on benefits from buying homes.

Moreover, these residents felt that short-term lets also had adverse impacts on essential services to the community. Examples mentioned by respondents include teachers and firefighters unable to afford local rents.

8.6. Like housing availability, housing prices are described to be a locally concentrated issue, particularly grave in tourist destinations such as Cornwall, Devon, Kent, or the Lake District.

> *"Every [short-term let] takes a home off the market for renters or buyers. This causes an artificial shortage of housing, causes prices to rise, and prevents those in most need from having somewhere to live."* (Individual respondent)

> *"[…] we have heard many accounts of people presenting as homeless who previously would have had no trouble finding a home because they simply cannot find anywhere affordable to rent. This includes essential workers such as nurses and teachers who traditionally would have been welcomed by PRS landlords as tenants, who cannot find anywhere to live after […] the properties have been turned into a short term lets."* (Individual respondent)

Social issues

8.7. The third most prominent theme (raised by around 15% of responses) surrounded social issues, namely social housing, gentrification, and community cohesion. Respondents thought that the increase in housing prices and availability could force out long-term residents and future generations wanting to stay in their hometowns. These respondents suggested that housing stock was likely to be bought up as second homes, resulting in gentrification and a shortage of affordable housing. Respondents also expressed concern that this process would negatively affect community ties or local culture because second home owners may only spend little time in those communities throughout the year. Simialarly, rotating groups of guests are perceived unlikely to contribute to the local social fabric.

> *"The final point I want to draw your attention to is the impacts this has on even homeowners and other long-term residents, most particularly the fear and isolation I have observed in people who are the only full time / long term residents on their street."* (Individual respondent)

> *"This is creating enclaves where permanent residents are left with few wintertime neighbours potentially creating a lack of community and the social and health problems."* (Organisational respondent)

Regional disparities

8.8. Around 5% of respondents mentioned regional variation in the impact of short-term lets on local housing markets, as they felt that the key problems of housing availability and prices were emphasised as particularly adverse in tourist hotspots. These respondents mentioned that popular tourist destinations coincided with coastal or rural areas characterised by smaller towns with less flexibility to absorb increased short-term use of housing. To account for this, some respondents suggested the need for a locally adjustable policy for addressing housing issues. Other respondents also acknowledged that short-term lets could provide a valuable source of income in these communities and the impact on the housing market from growth in short-term lets was not as straightforward.

> *"I think that this is regional/local rather than general. In areas such as the lakes, it is a complex question as local people are dependent on the short term lets/ holiday lets for their income."* (Individual respondent)
>
> *"[England] has a long-term problem of housing affordability and the adequacy of the supply of affordable homes, which has been worsening over decades. In some locations these problems have been exacerbated dramatically by increasing levels of homes being used for the provision of holiday and short term lets and the corresponding decrease in numbers of homes available in the private rented sector (PRS)."* (Organisational respondent)

9. Noise and anti-social behaviour

Question 7: Do you consider noise, anti-social or other nuisance behaviour in short-term and holiday lets in England to be a problem? If so, why?

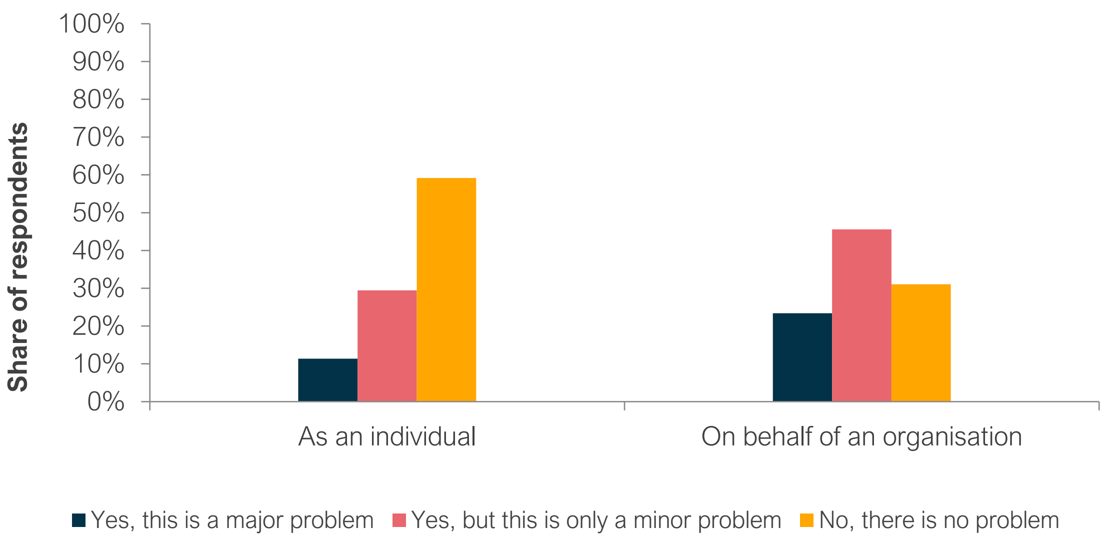
Key findings

- Hosts operating in the short-term and holiday letting market were likely to state they had not experienced this type of behaviour or had only heard of this for larger properties
- Organisations were more likely to express concern, with respondents identifying the total number of short-term lets in an area and the types of visitors as two factors increasing the scope of the problem.

Quantitative analysis

9.1. There were 2,694 respondents to this question (2,461 from individuals and 233 from organisations). Out of all respondents, 12% said that noise, anti-social or other nuisance behaviour was a major problem, 31% said it was a minor problem and 57% said it was not a problem. Among respondent types, hosts were least likely to respond that this was a major problem (3% of respondents), compared to 39% of respondents who were members of the public. For organisations, less than 10% of short-term and holiday let service companies and guest accommodation operators said that noise, anti-social or other nuisance behaviour was a major problem (though between 40% and 50% of these respondents said it was a minor problem). In comparison, 52% of local authorities said that this was a major problem.

Responses by Respondent Type



Qualitative analysis

9.2. Respondents were also asked to provide any comments on their response. There were 2,248 responses to this open-format question (2,053 from individuals and 195 from organisations).

Over 75% of responses were variations of “We have never had this problem” or “We are conscious of this problem and take steps to avoid it”, and these responses are excluded from the analysis below.

9.3. The key themes raised in responses are detailed below in order of highest to lowest frequency within the responses.

Noise

9.4. The theme most frequently emphasised (by around one-third of respondents) were issues of noise disruption and the inability of the short-term let sector to address such concerns by neighbours. Responses frequently highlighted the inability of owners to address disruptions in a timely manner, given they often live far away or even in different time zones. Police were described as frequently unwilling to address noise complaints which left local residents feeling left alone with problems resulting from short-term let guests. Respondents often provided examples of incidents that were especially disruptive, such as hen and stag weekends or properties described as “party houses”, rented only for very few nights. To mitigate this problem, a small number of respondents suggested screening visitors prior to accepting bookings and to reject any stag, hen, or party groups.

> *“ASB [anti-social behaviour] and noise are becoming an increasing problem within holiday lets, especially with the growth in party houses which can accommodate ten or more guests […]. The number of complaints from such properties is up to 5 or 6 per week in the holiday/high season, but complaints do occur throughout the year.”* (Organisational respondent)

> *“We have issues with properties in city centre blocks that are interspersed with flats that are people’s permanent residences, […] Nevertheless, it is fair to say that due to a combination of high turnover and particularly intensive use (i.e. above average numbers of occupants), STLs apply a higher level of pressure on public services than traditional residential uses.”* (Organisational respondent)

Variation by location and type of guest

9.5. Similar to broader problems traced directly to short-term lets, respondents also noted that noise and other disruption complaints tended to be highly geographically concentrated. Around 10% of respondents mentioned this theme, pointing out that noise problems most often applied to residential neighbourhoods as well as rural tourist destinations with increasing numbers of short-term lets. Two important distinctions made by call for evidence replies are the total number of short-term lets in a local area influencing the levels of disruption, and secondly, the types of groups visiting a particular area.

> *“We operate in a quiet rural area and our guests are mainly empty nesters and do not cause problems in the local area, many are good friends with the locals and hosts. However there are properties that operate as party houses that are not managed by an owner or manager who resides nearby.”* (Individual respondent)

> *“This is a minor problem confined to a few, mainly inner-city, locations. It is not widespread.”* (Organisational respondent)

10. Other adverse impacts

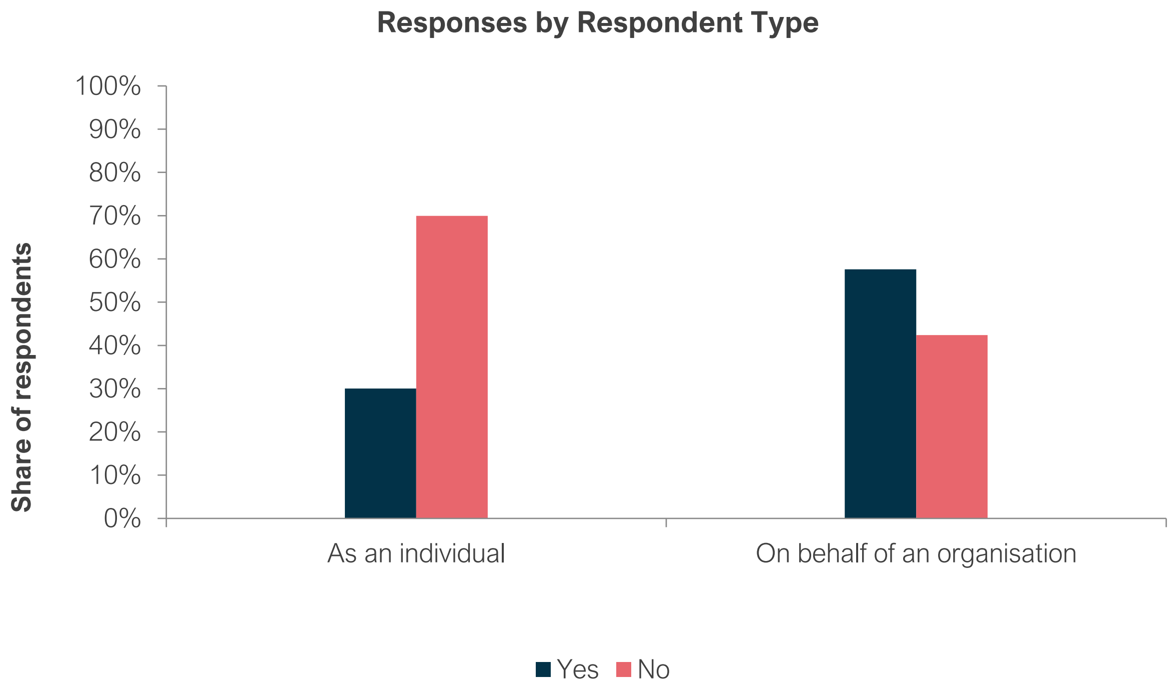
Question 8: Aside from the impacts on housing and incidents of anti-social/nuisance behaviour, do you consider the increase in short-term and holiday letting in England to have had other adverse impacts on local communities and residents?

Key findings

- Most respondents who answered this question focused on community services. These respondents were concerned that those who provided community services (local police, teachers, nurses) could no longer afford to live in the community due to the presence of short-term lets.
- Other respondents discussed the theme of community cohesion, including the potential impact of short-term lets on residents' groups and networks of neighbours that foster a sense of social cohesion and belonging.

Quantitative analysis

10.1. There were 2,835 respondents to this question (2,604 from individuals and 231 from organisations). Out of all respondents, 32% said that the increase in short-term and holiday letting had other adverse impacts on local communities and residents, and 68% said there were no other adverse impacts. Among respondent types, hosts were least likely to respond "Yes" (19% of respondents), compared to 56% of respondents who were members of the public. For organisations, short-term and holiday let service companies were the respondent type least likely to respond "Yes" (33% of respondents), compared to 49% of guest accommodation operators. In comparison, 93% of local authorities said that this was a major problem.



Qualitative analysis

10.2. Respondents were also asked to provide any comments on their response. There were 1,976 responses to the open-format question (1,798 from individuals and 178 from organisations). The key themes raised in responses are detailed below in order of highest to lowest frequency within the responses.

Community services

10.3. The most frequently highlighted concern (raised by around 70% of respondents) is the provision of community services for local residents. Respondents understand this primarily as the provision of public services and, crucially, the workers needed in such sectors. This includes education, health care, emergency services, supermarkets and local shops, bin collection, and agricultural workers. This problem is frequently highlighted by respondents from small towns that are popular tourist destinations, reportedly with a high density of short-term lets.

10.4. Some small community residents report that the lack of affordable housing has forced local teachers to move outside the local area which is further aggravated by local families being displaced. In turn, this affects the number of local children and, thus, local schools and public libraries remaining open. Similar dynamics were identified as applicable to emergency services such as local police and fire fighters, as well as NHS staff such as nurses. These groups are frequently paid too little to live locally since and are forced to compete with more profitable short-term lets for housing.

> *"Whilst there is full employment, such employment is low paid minimum wage, seasonal work. The two-tier effect of a high proportion of second homes in an area distorts the community into high earning investors/owners, and minimum wage low paid workers. There is little in-between. This distorts the community and impacts on local government provision of derives for schools, medical services etc. There is well documented evidence for the impact on schools and medical services of a low wage/seasonal work economy, and second home owners create this disparity."* (Individual respondent)

> *"Key community service providers like GPs, school teacher or motor mechanics and others traders normally trading to a resident, rather than transient visitors, are under threat and the physical services they provide like GP practices, schools and even garages etc. will decline or disappear."* (Organisational respondent)

Community cohesion

10.5. Closely corresponding to community services, the issue of local workers and families leaving their local communities adversely affects community cohesion. This was the second most frequent theme (raised by around half of respondents). Respondents suggested different theories why short-term lets might lead to people moving out of the community (low housing availability, high rents, national housing market situation, terminated rental contracts, inability to find work outside the tourism sector), though little evidence (either quantitative or anecdotal) was provided to support this claim.

10.6. One consequence of local residents moving out of the community is a larger number of houses that are either empty for several months per year, or occupied by frequently changing visitors. Respondents explained that this impacts local community ties, everyday support among neighbours, or community clubs and activities. In turn, this was perceived to affect people's mental health adversely.

> *"The whole community is affected by the loss of local permanent residents' local groups such as coffee mornings, knit and natter, warm and well as there isn't enough numbers to run groups which aids in community spirt, health and wellbeing for those residing permanently in these small rural communities. […] This as above does affect local communities and people no longer know their neighbours and those that maybe old and or vulnerable don't have then network of neighbours to drop in and check on their welfare."* (Organisational respondent)

> *"These properties help build "ghost communities" where no lights are showing during the quieter months. Local infrastructures break down as there is perceived to be a decline in take up of public amenities. Visitors are less likely to get involved in local events. People living around these ghost houses are expected to keep an eye on them even though there is little benefit to them."* (Individual respondent)

11. Potential regulatory responses

Question 9: Which of the following do you consider to be the most appropriate form of response in the short-term letting market?

1 - Do nothing

2 - Provide more information to the sector

3 - Develop a self-certification registration scheme

4 - Develop a registration scheme with light-touch checks

5 - Develop a licensing scheme with physical checks of the premises

6 - Regulatory alternative to a registration system, such as extension of the Deregulation Act 2015

Key findings

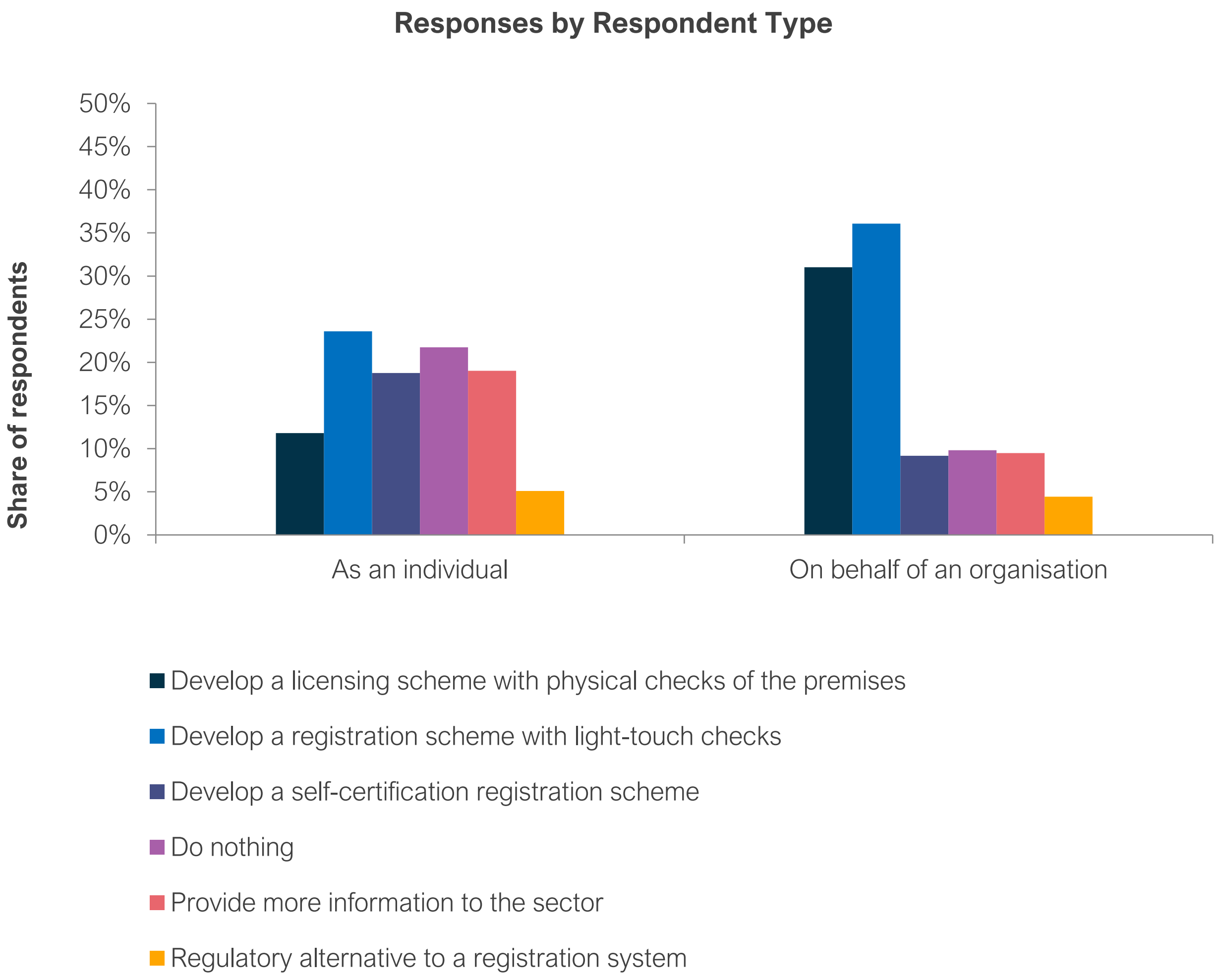
- Organisational respondents generally preferred a licensing scheme with physical checks or a registration scheme with light-touch checks, while individual respondents were more evenly split in their preferred form of response.
- Respondents' preferred regulatory scheme was correlated with their answers to previous questions in the call for evidence: those who preferred a licensing scheme with physical checks thought that compliance with contractual obligations was relatively poor and the increase in short-term and holiday letting posed major problems for communities.
- On the other hand, respondents who preferred a self-certification registration scheme or doing nothing thought that compliance was relatively good and the increase in short-term and holiday letting did not negatively impact communities.

Quantitative analysis

11.1. There were 3,406 respondents to this question (3,122 from individuals and 284 from organisations). Out of all respondents, 24% preferred a registration scheme with light-touch checks, 21% preferred to do nothing, 18% preferred a self-certification registration scheme, 18% asked that more information be provided to the sector, 13% preferred a licensing scheme with physical checks of the premises and 5% preferred a regulatory alternative. Individuals were more evenly divided in their responses, while organisations favoured a registration scheme with light-touch checks (35% of respondents) or a licensing scheme with physical checks of the premises (30%).

11.2. For individual respondents, hosts were evenly split between preferences for registration schemes with light-touch checks, self-certification registration schemes, do nothing or provide more information (22-24% of respondents for each option), while 34% of those responding as members of the public were most supportive of a licensing scheme with physical checks.

11.3. For organisations, guest accommodation operators and short-term/holiday let service companies were most supportive of a registration scheme with light-touch checks (between 34-42% of respondents), while local authorities most strongly supported a licensing scheme with physical checks (58% of respondents).



Respondent profiles by preferred regulatory option

11.4. Respondents' selection of preferred regulatory response in Question 9 may be correlated with their perspectives on the potential negative housing and community impacts of short-term and holiday lettings. To examine this more formally, we carried out a cross-tabulation analysis between responses to Question 9 and responses to Questions 3, 4, 6, 7 and 8. For each of these questions, we present a graph that plots the share of respondents who selected each answer choice, with respondents split by their preferred regulatory option selected in question 9.

11.5. In general, respondents who preferred a licensing scheme with physical checks thought that compliance with contractual obligations/statutory requirements was relatively poor and the increase in short-term and holiday letting posed major problems for communities. On the other hand, respondents who preferred a self-certification registration scheme or doing nothing thought that compliance was relatively good and the increase in short-term and holiday letting did not negatively impact communities. Finally, respondents who preferred a regulatory alternative to a registration system were more likely to think that compliance with contractual obligations/statutory requirements was good, but the increase in short-term and holiday letting posed major problems for communities.

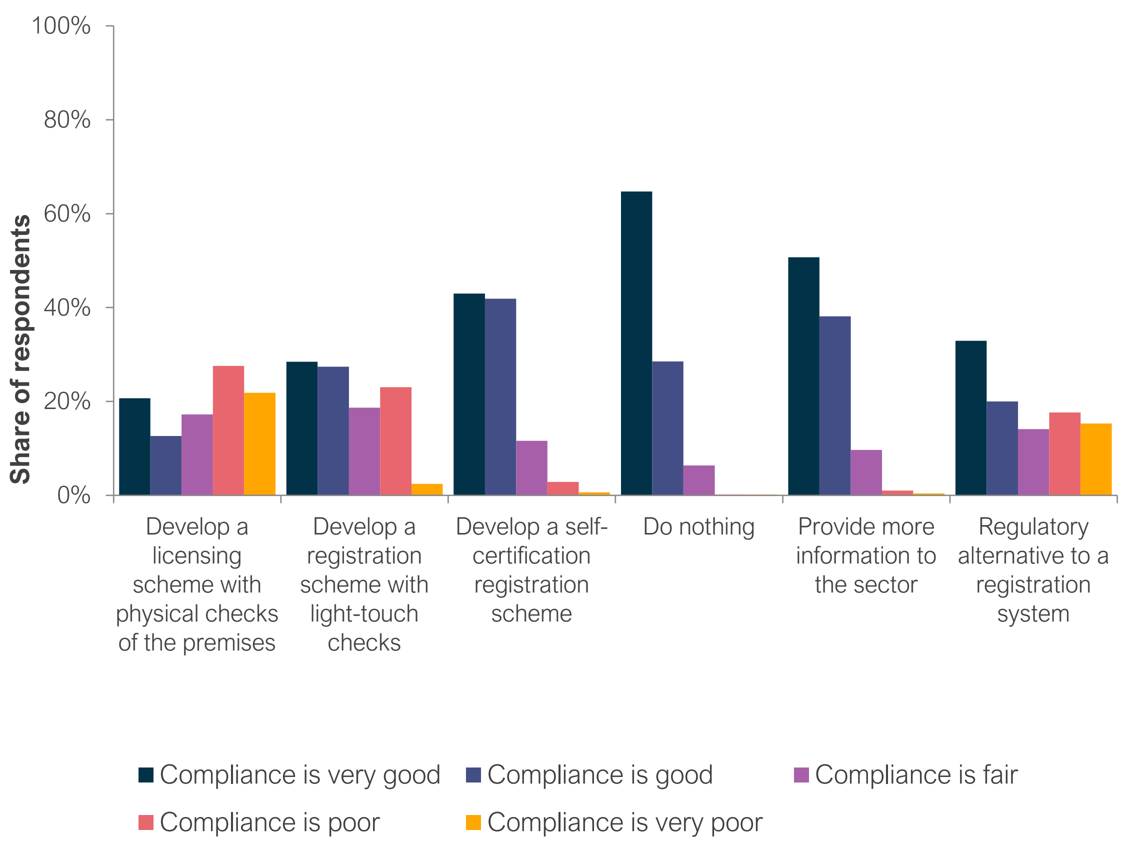
Fire safety

11.6. Almost all respondents who selected “Do nothing”, “Provide more information to the sector” or “Develop a self-certification registration scheme” thought that compliance with fire safety was good or very good. Only 33% of respondents who selected a licensing scheme with physical checks as the most appropriate form of response said that compliance was good or very good, and 49% thought that compliance was poor or very poor.

11.7. Among individuals who preferred a licensing scheme with physical checks, 36% said compliance with fire safety was either good or very good. Among organisations, only 21% gave the same answer. Notably, among individuals who preferred a registration scheme with light-touch checks, 61% considered compliance to be good or very good, meanwhile only 22% of organisational respondents thought so. Instead, 56% of organisational respondents in favour of a registrations scheme with light-touch checks thought compliance was poor or very poor.

11.8. In summary, the graph below displays the tendency that respondents who favoured doing nothing or taking light actions were more likely to think positively about compliance with fire safety in the sector. In contrast, respondents who favoured licensing schemes with physical checks or registration schemes with light-touch checks displayed divided perceptions and tended to view compliance more negatively than those favouring doing nothing.

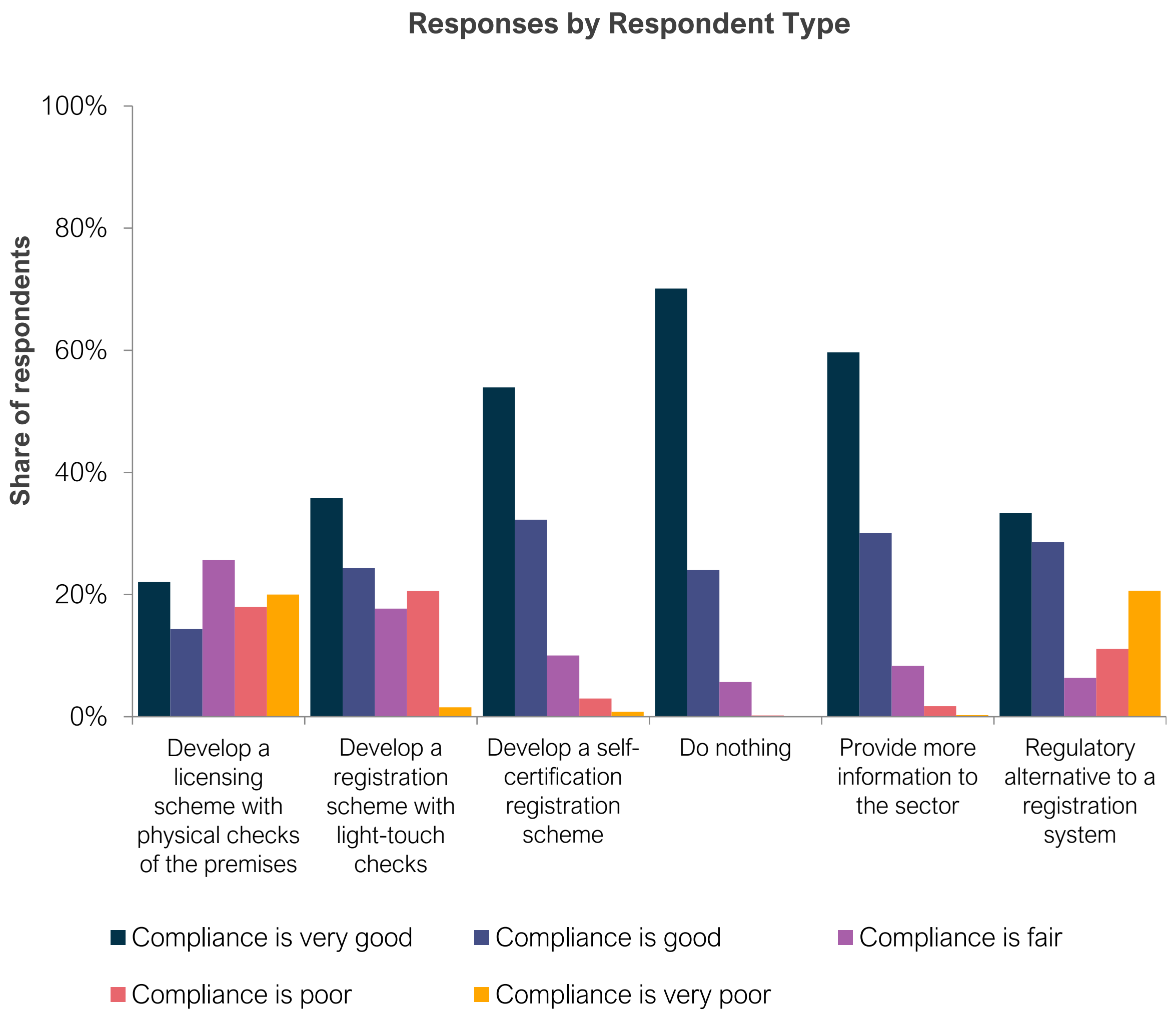
Responses by Respondent Type



Gas safety

11.9. Almost all respondents who selected “Do nothing”, “Provide more information to the sector”, or “Develop a self-certification registration scheme” thought that compliance with gas safety was good or very good. On the other hand, only 36% of respondents who selected a licensing scheme with physical checks as the most appropriate form of response said that compliance was good or very good, and 38% thought that compliance was poor or very poor. Among individuals who preferred a registration scheme with light-touch checks, only 18% considered compliance to be poor or very poor, meanwhile 49% of organisational respondents thought so.

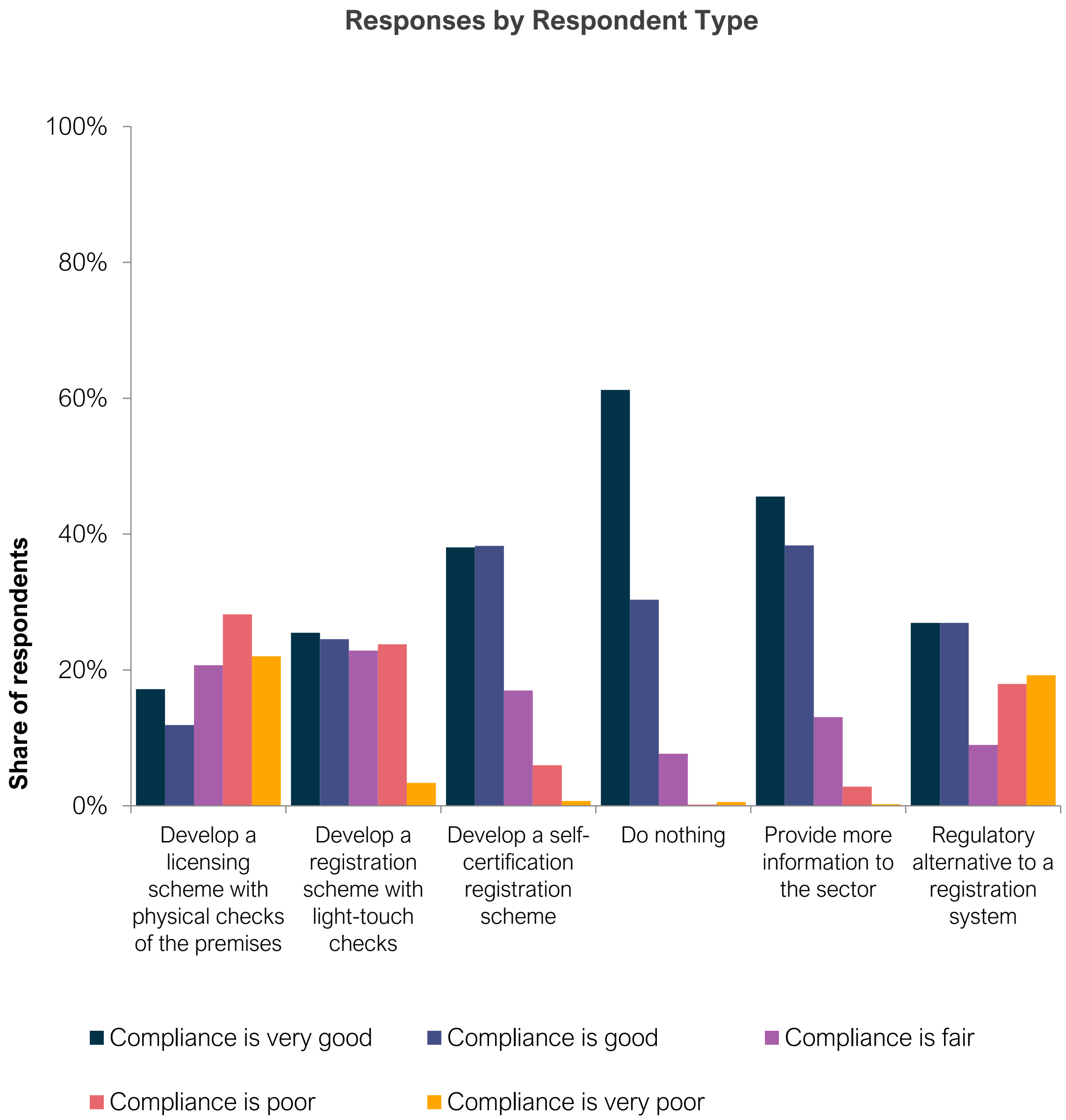
11.10. In summary, the graph below displays a tendency that respondents that preferred doing nothing or taking light action were more likely to think that compliance with gas safety was very good or good. In contrast, respondents who favoured licensing schemes with physical checks or registration schemes with light-touch checks displayed divided perceptions and frequently viewed compliance more negatively than, for example, those favouring to do nothing or asking for more information.



Health and safety

11.11. Almost all respondents who selected “Do nothing”, “Provide more information to the sector” or “Develop a self-certification registration scheme” thought that compliance with health and safety was good or very good. On the other hand, only 29% of respondents who selected a licensing scheme with physical checks as the most appropriate form of response said that compliance was good or very good, and 50% thought that compliance was poor or very poor. Only small differences in the answer patterns between individuals and organisations could be detected on the issue of health and safety.

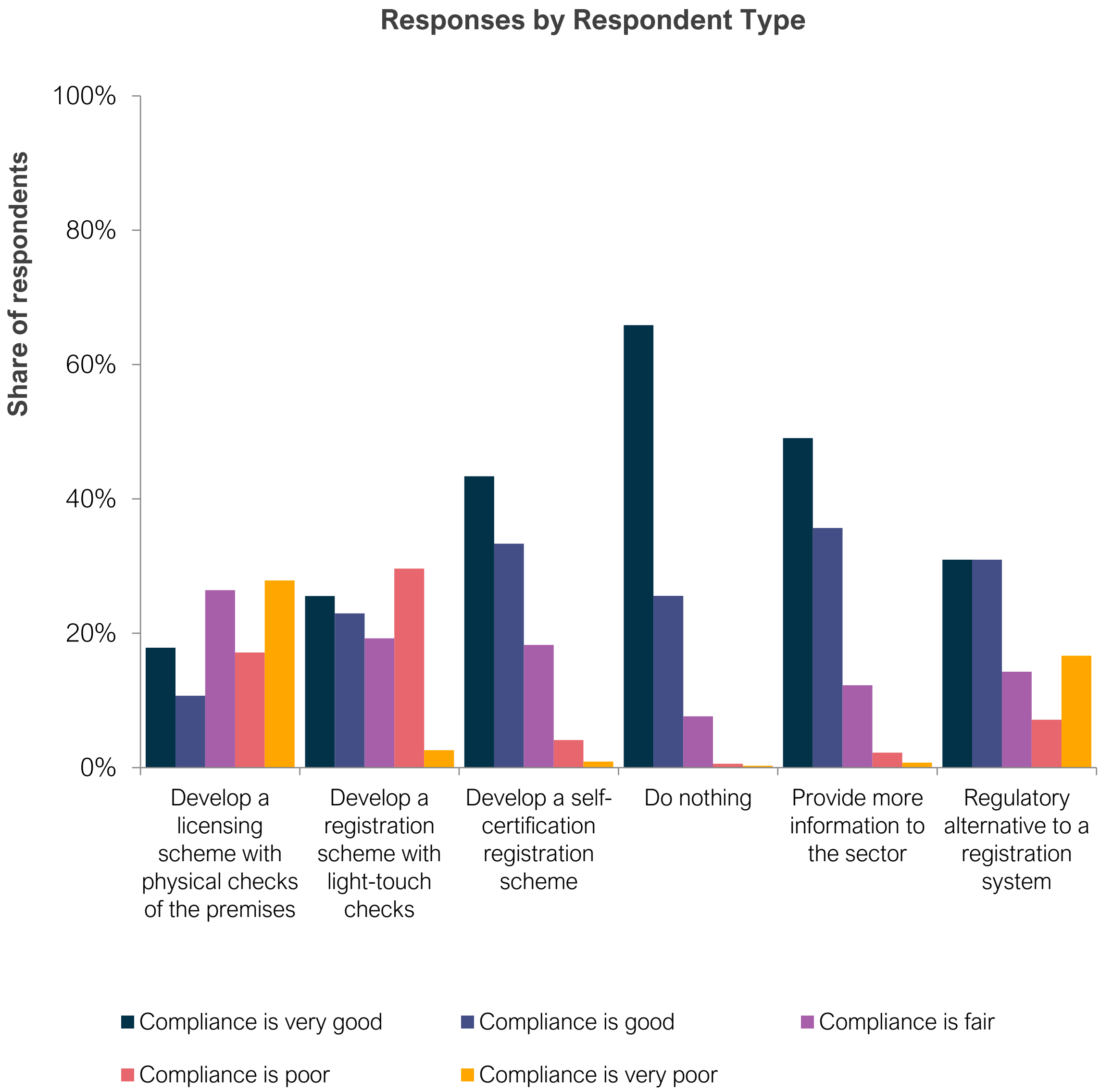
11.12. In summary, the graph below displays the tendency that respondents who favoured doing nothing or taking light action (e.g. self-certification scheme, providing additional information) think that compliance with health and safety regulation is very good or good. In contrast, respondents who favour licensing schemes display divided perceptions and frequently think compliance is fair, poor, or very poor.



Food and drink

11.13. Almost all respondents who selected “Do nothing”, “Provide more information to the sector” or “Develop a self-certification registration scheme” thought that compliance with food and drink was good or very good. On the other hand, only 29% of respondents who selected a licensing scheme with physical checks as the most appropriate form of response said that compliance was good or very good, and 45% thought that compliance was poor or very poor. Only small differences in the answer patterns between individuals and organisations could be detected on the issue of food and drink.

11.14. In summary, the graph below depicts the tendency that respondents who favoured doing nothing or taking light action were more likely to think positively abut compliance with food and drink regulation. On the other hand, respondents who preferred licensing schemes with physical checks or registration schemes with light-touch checks reported divided perceptions and tended to view compliance more negatively than those favouring to change little or nothing.



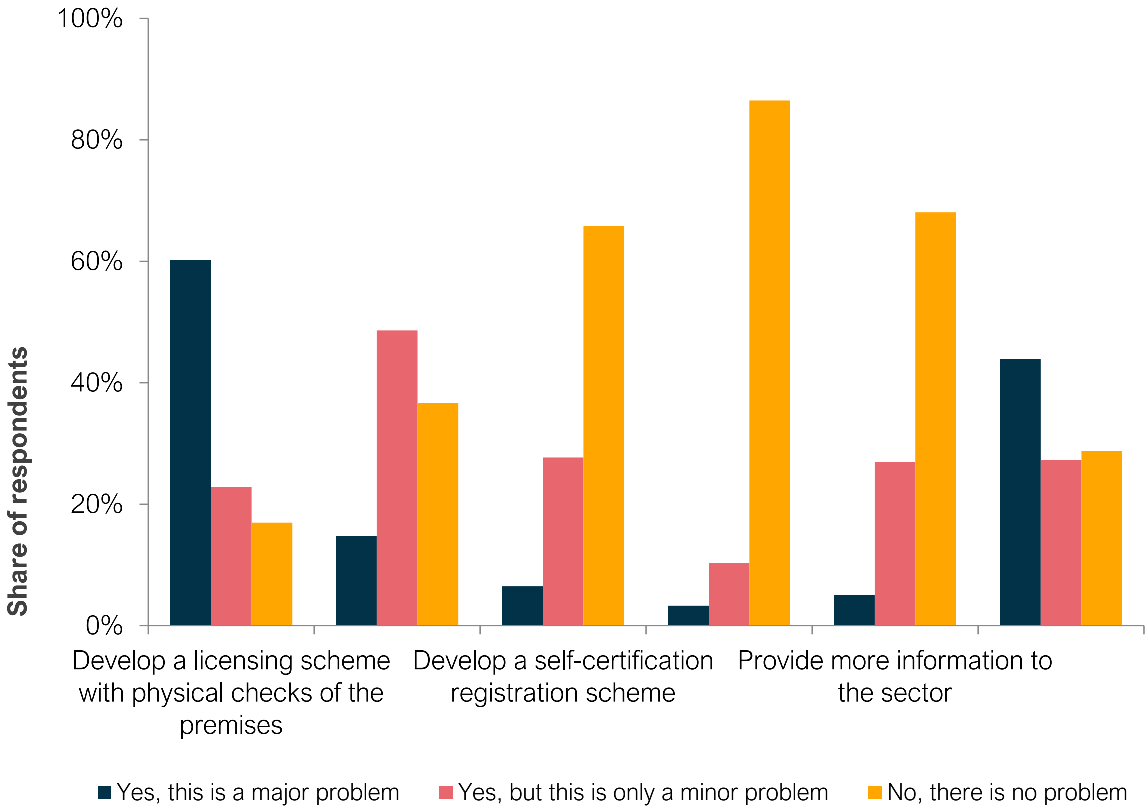
Breach of contractual agreements

11.15. 60% of respondents who selected a licensing scheme with physical checks as the most appropriate form of response and 44% of respondents who preferred a regulatory alternative said that breach of contractual agreements was a major problem. In comparison, 3% of respondents who selected "Do nothing", 5% of respondents who selected "Provide more information to the sector" and 6% of respondents who selected a self-certification registration scheme said that this was a major problem. Respondents who selected "Do nothing" were the most likely to say that there was no problem (86%).

11.16. Among individuals who preferred a registration scheme with light-touch checks, 42% responded that they did not think contractual breaches were a major problem. This contrasts with 6% of organisations with the same registration scheme preference answering that there was no problem. Furthermore, of individuals who were in favour of developing a self-certification registration scheme, 33% thought there was this was a major or minor problem meanwhile 67% thought there was no problem at all. In contrast, 55% of organisations thought this was a major or minor problem while 44% did not perceive this as problematic.

11.17. In summary, the graph below displays the tendency that respondents who favoured doing nothing or taking light action were more likely to think that there is no problem with contractual breaches. In contrast, respondents who favoured a licensing scheme with physical checks were more likely to think that contractual breaches are a major problem (60%).

Responses by Respondent Type

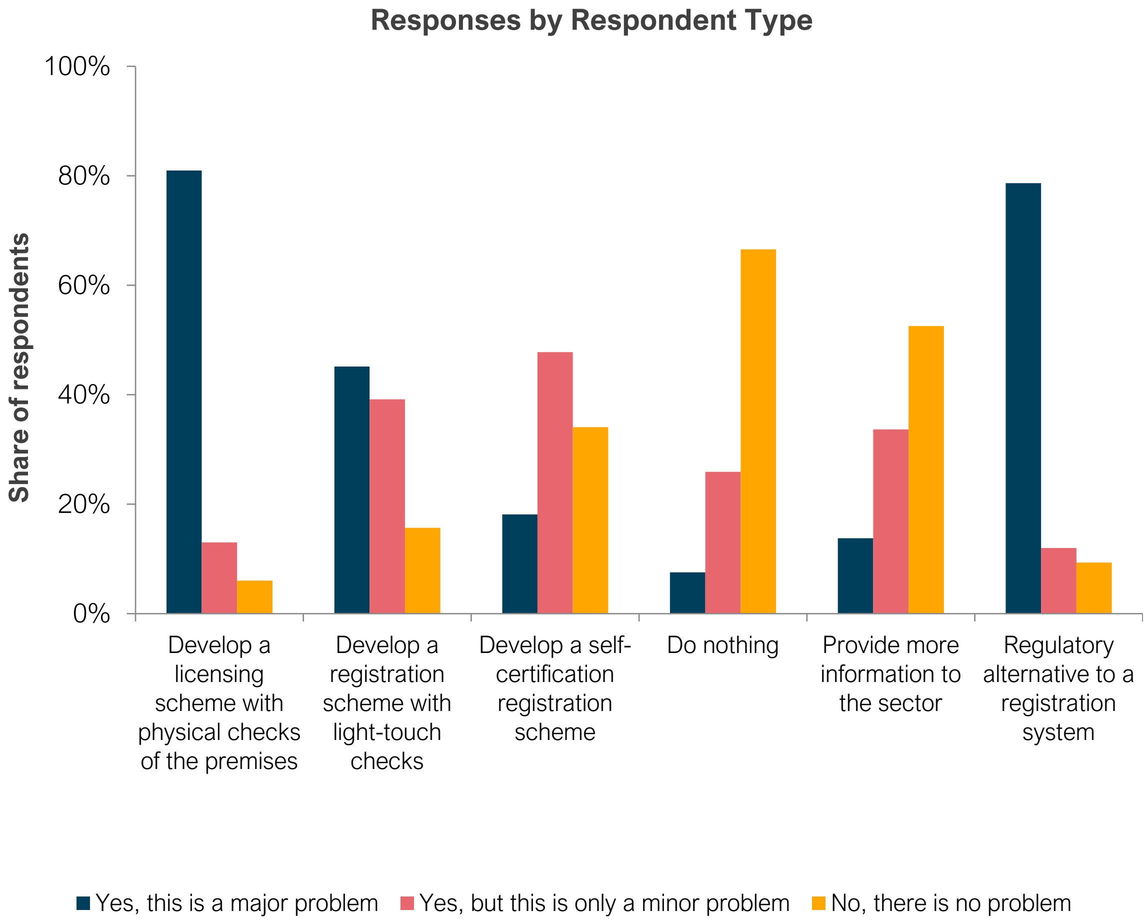


Adverse consequences on the housing market

11.18. 81% of respondents who selected a licensing scheme with physical checks as the most appropriate form of response and 79% of respondents who preferred a regulatory alternative said that the increase in short-term and holiday letting in England had adverse consequences on the housing market. In comparison, 8% of respondents who selected "Do nothing", 14% of respondents who selected "Provide more information to the sector" and 18% of respondents who selected a self-certification registration scheme said that this was a major problem. Respondents who selected "Do nothing" as well as "Provide more information to the sector" were the most likely to say that there was no problem (67% and 53% respectively).

11.19. In summary, the graph below displays the tendency that respondents who favoured doing nothing or providing additional information were more likely to think that there is no problem in the impact of short-term lets on housing. In contrast, respondents who favoured licensing schemes with physical checks identified impacts on housing as a major problem (81% of respondents favouring licensing scheme with physical checks). Among those who favoured a registration scheme with light-touch checks, 45% identify this as a major problem and 39% say this is a minor problem. Answers did not differ substantially between individuals and organisations.

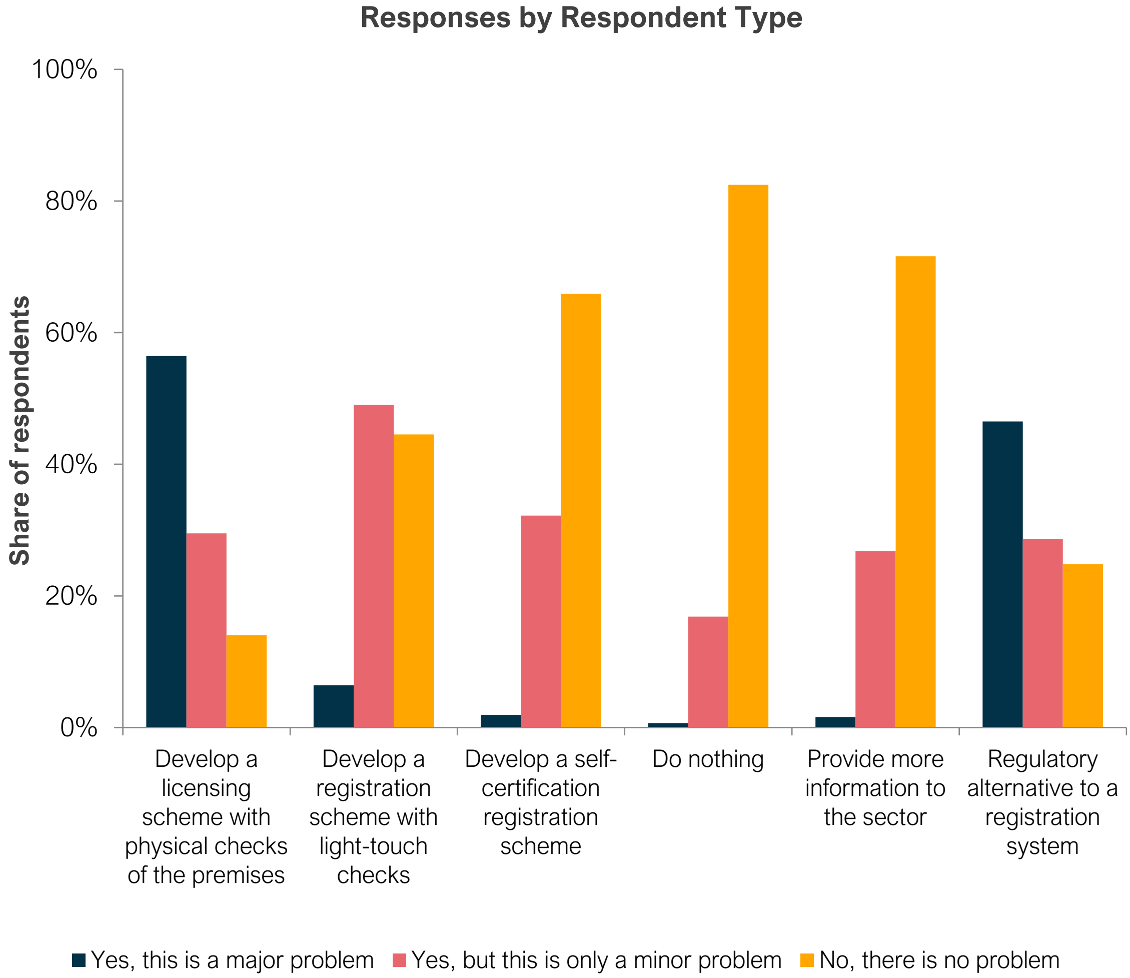
11.20. Notably, 79% of respondents preferring a regulatory alternative to the registration system say that they think the impact on the housing market is a major problem. Further details on proposed alternative schemes answered to the free-text question can be found in the qualitative analysis below.



Noise, anti-social or other nuisance behaviour

11.21. 56% of respondents who selected a licensing scheme with physical checks as the most appropriate form of response and 47% who preferred a regulatory alternative said that noise, anti-social or other nuisance behaviour in short-term and holiday lets in England were a major problem. In comparison, less than 10% of respondents who selected any other response to Question 9 said that this was a major problem. Respondents who selected “Do nothing” and “Provide more information to the sector” were the most likely to say that there was no problem (82% and 72% respectively). Among individuals who preferred a registration scheme with light-touch checks, 47% of respondents thought that noise or anti-social behaviour did not constitute a problem. In contrast, only 29% or organisational respondents with the same scheme preference thought there was no problem.

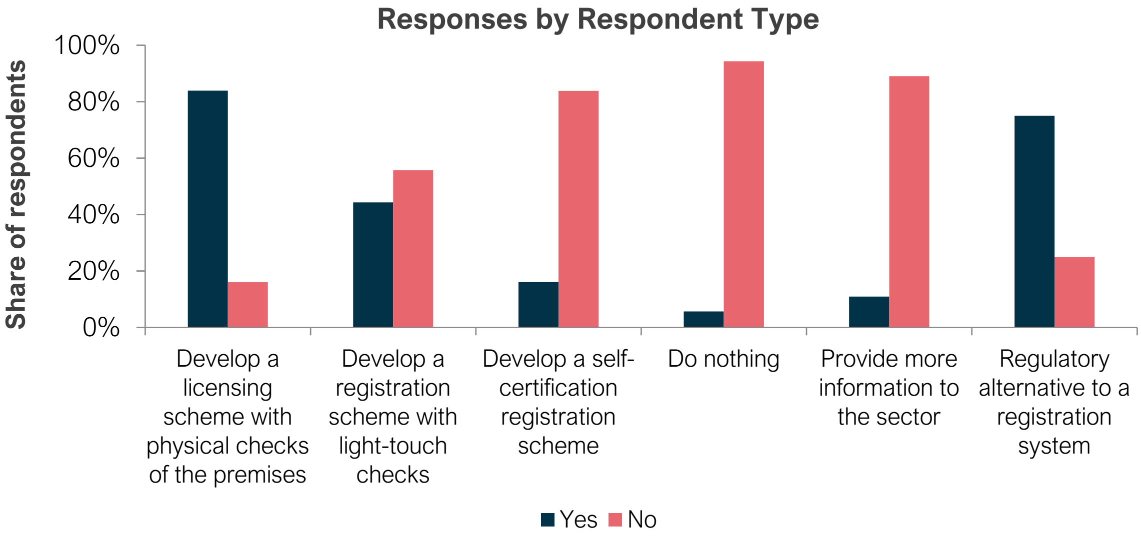
11.22. In summary, the graph below displays the tendency that respondents who favoured doing nothing, developing a self-registration scheme, or providing more information were more likely to think that noise and anti-social behaviour was not a problem. In contrast, respondents who favoured licensing schemes with physical checks think that this represents a major problem. On this issue of anti-social behaviour, a difference in response pattern can be detected between those favouring a registration scheme with light-touch checks and those preferring licensing schemes with physical checks. In prior elements of this call for evidence, response patterns for these two categories displayed similar response trends.



Other adverse impacts on local communities and residents

11.23. 84% of respondents who selected a licensing scheme with physical checks as the most appropriate form of response and 75% who preferred a regulatory alternative said the increase in short-term and holiday letting in England had other adverse impacts on local communities and residents. In comparison, less than 20% of respondents who selected "Do nothing", "Provide more information to the sector" or "Develop a self-certification registration scheme" said there were other adverse impacts. Respondents who selected "Do nothing" and "Provide more information to the sector" were the most likely to say that there were no adverse impacts (94% and 89% respectively). Answers did not display major differences between individuals compared to organisations.

11.24. In summary, the graph below displays the tendency that respondents who favoured developing a self-certification scheme, doing nothing, or providing more information did not perceive adverse consequences on communities. In contrast, respondents who favour a licensing scheme with physical checks are the most likely to identify such problems for communities.



Qualitative analysis

11.25. Respondents were also asked to provide any comments on their response. There were 2,273 responses to this open-format question (2,057 from individuals and 216 from organisations). The key themes raised in responses are detailed below in order of highest to lowest frequency within the responses. Respondents frequently used this open question to further elaborate on their opinions of certain schemes as well as proposing additional interventions and policy components such as planning and taxation.

Planning applications

11.26. The theme most often highlighted (by around 40% of respondents) was the necessity of planning applications specifically for short-term lets, for example by introducing a dedicated planning application class. Respondents perceived such provisions as crucial to steer how many properties could be used as short-term lets in any local area and to impose potential time limits on letting. Examples include caps of short-term lets per 100,000 inhabitants or as a percentage of local housing stock. This would give individual councils the opportunity to influence the local short-term lets sector and respond to local residents' demands and concerns.

11.27. Furthermore, improved planning requirements are understood to help the collection of data on the sector which would allow policymakers and regulators an accurate understanding of the market and its size as well as associated risks.

> *"The only way to preserve housing for locals is for short-term lets to have their own planning use class; […] Local authorities should have the power to consent or refuse, without appeal."* (Individual respondent)

> *"Whilst the government is seeking views on registration and licensing, these on their own will not prevent houses being turned into short term lets. It is planning regulations in England that deal with how land is used. Therefore in order to protect housing, short-term lets should be given their own planning use class so that owners are required to seek planning permission before turning a home into a short-term let so that local authorities are empowered to say no depending on local housing pressures and other concerns."* (Organisational respondent)

Licensing schemes

11.28. The next most frequently mentioned theme (by around 25% of respondents) were respondents arguing that tighter licensing restrictions should be imposed on short-term let properties. This is argued to be particularly vital for health and safety measures. Premises would have to be checked, approved, and licensed before being let out to visitors which could reduce risks and hazards. Another aspect of licensing is set out to be quality assurance. Respondents argue that requiring a license to operate could ensure minimum quality standards to visitors.

11.29. In sum, respondents recommend the combination of planning and licensing measures in order to tackle a number of related problems ranging from housing issues to health and safety concerns.

> *"A licensing scheme based on the schemes successfully delivered by local authorities in respect of gambling establishments and pubs etc would ensure that not only holiday lets are brought into the awareness of regulatory bodies, but it would give councils, who have the knowledge of their local communities, the power to license appropriate premises and, more importantly, the power to review a license where an operator is not managing it appropriately."* (Organisational respondent)

> *"It is currently very difficult to gather accurate information about the holiday lets because the holiday home market is unregulated. Licensing should be introduced […] which also includes changes to taxation and the planning system"* (Organisational respondent)

Safety and quality checks

11.30. The third most common theme (raised by around 15% of respondents) builds on the recurring argument in favour of imposing licensing mandates on short-term let properties. Respondents stress that safety and quality checks should be executed prior to approving any such property to be let. Specifically, respondents mention fire safety and operating hot tubs. Certificates and information should be shared with local councils to ensure sufficient checks.

> *"Any registration scheme must be accompanied by sufficient information-sharing with local authorities […] to demonstrate compliance with fire safety and other certificates."* (Organisational respondent)

(Council) Tax payments

11.31. The fourth theme (raised by around 10% of respondents) was short-term let properties should also be subject to council tax payments. Some respondents elaborate on loopholes for second homes which may be exempt from council tax, meanwhile, due to a lack of regulation of the sector, few short-term let owners pay business taxes either. The result is perceived as disadvantageous to resident communities that pay for upkeep and local services while receiving few benefits as opposed to property owners.

11.32. A number of respondents furthermore highlight that, by introducing a planning and licensing scheme, this would provide councils with the necessary data to tax short-term lets.

> *"There is currently a major loophole in the tax system that allows second home owners to set us as business - let their property for a few weeks a year to cover their costs and […] pay no business rates or council tax."* (Individual respondent)

> *"However, enabling local authorities to charge council tax premiums and vary business rates could generate proceeds to be invested in much needed affordable housing provision to replace the homes lost. This could be targeted at those areas most affected and experiencing the greatest housing stress and set at price points local people can afford. This is the proposal in Cornwall, where the local authority have demonstrated that if the council tax premium were set on second homes at 100 per cent of the normal council tax level it could generate ca. £20m in revenue per annum."* (Organisational response)

12. Costs and burdens of regulatory responses

Question 10: What do you consider to be the costs and associated burdens of these options, who would bear the costs and how might they be mitigated?

Key findings

- Respondents who supported a licensing scheme with physical checks or a registration scheme with light-touch checks often expressed a willingness to cover the costs of these checks in their responses, while respondents who supported a self-certification registration scheme or a "do nothing" approach felt that costs would negatively impact owners and any scheme should be as low-cost as possible.
- Of the respondents who discussed the burdens of regulatory schemes, most suggested local authorities should be responsible as they had the most knowledge of the local housing stock/short-term lets market and were best-positioned to implement enforcement measures.
- Two strategies for mitigating costs suggested by respondents included focusing on registration schemes with light-touch checks (to balance the need for monitoring with the administrative burden on hosts) or shifting the financial burden to short-term let owners (through initial registration fees, annual fees or increased council tax/business rates).

Qualitative analysis

12.1. There were 2,521 responses to this open-format question (2,290 from individuals and 231 from organisations). The key themes raised in responses are detailed below in order of highest to lowest frequency within the responses.

Costs

Owners paying costs

12.2. Asked about costs associated with different regulatory proposals, the most frequent theme mentioned (by around 30% of respondents) was that short-term let owners should be bearing all costs associated with any future scheme, although hosts operating in the short-term and holiday letting market often acknowledged they would pass on these costs to visitors. Responses specify that owners should either pay initial registration fees for setting up rentals before being allowed to let them out, a yearly fee, or be charged through other mechanisms such as increased council tax rates or adapted business rates. An important distinction suggested by several individuals is to stagger registration fees, depending on how many properties someone is renting out, and to consider suspending or reducing the fee for individual rooms within otherwise full-time occupied houses.

12.3. However, it should be noted that some respondents raise concerns over possible complications, lack of oversight, and fears for high costs to administer such a system.

> *"If a flat rate fee of £100 to £250 per annum was charged to all providers, this would generate the resources to inform, help, support, train and most importantly have robust enforcement of all the existing regulations. However, whilst simple to administer a graduated*

> *fee to reflect the scale of the provision would be fairer with a lower fee charged for smaller operators and a larger fee charged to larger providers."* (Organisational respondent)

> *"We feel that there is a strong case for a licensing scheme which would involve physical checks of all short-term letting accommodation (option 5 in question 9). The costs of operating such a scheme should be met through licensing fees which would be set by district councils in shire county areas, thus allowing them to recover the full cost of inspections, the licensing process and enforcement."* (Organisational respondent)

> *"Costs would be borne by owners, however it is also clear that they would then be passed on to consumers as raised letting/rental costs, which could be a negative to encouraging visitors to the area."* (Individual respondent)

Burdens

12.4. On the topic of who is burdened by the possible introduction of licensing, the theme mentioned most often (by around 20% of respondents) highlighted the role of local councils and planning offices in undertaking such tasks. Local councils are widely understood as the best-placed authority to implement any licensing system, given their local knowledge and enforcement powers, if necessary. They should furthermore be in charge of collecting and relevant data and passing it on to national authorities.

12.5. Notably, while this is considered a large burden on local authorities, most respondents emphasise that all additionally incurred costs should be recovered from landlords profiting from renting out their properties. This applies to all staffing, training, IT, and monitoring costs.

> *"Where any new powers are introduced, these are best devolved to councils that are licensing authorities, where they will sit alongside existing mechanisms for delivery and enabling financial efficiencies to be secured. However, local government must be fully resourced to deliver these new powers […] and should be permitted to set local fees which reflect the true cost of protecting and managing their communities, and growing their local visitor economy."* (Organisational respondent)

12.6. A smaller number of respondents (around 5%) suggested the possibility of letting agencies covering administrative costs as they already monitor certifications, public liability insurance, safety inspections and other regulatory requirements. These respondents were concerned about the possibility of paying to pay licensing fees twice (the first to local authorities, the second through fees charged by letting agencies).

> *"Reputable letting agents such as the agency I use already monitor certifications, insurance, safety etc for properties they manage.[…] I already pay an annual fee for the monitoring they carry out on my property. I do not wish to pay a second time, to another for the same thing."* (Individual respondent)

Mitigating options

Registration schemes with light-touch checks

12.7. Responses to potential mitigating options when addressing variations of registration or licensing schemes highlight several key themes. Most frequently, a substantial group of respondents (around 25% of respondents) recommend registration schemes with light-touch checks as a suitable solution.

12.8. On the one hand, registration schemes with light-touch checks would ensure a basic level of reassurance to guests, put health and safety requirements in place, and provide local authorities with useful data through registration. On the other hand, respondents argue that it would also provide a good balance by not over-burdening local councils nor house owners. In sum, it is therefore described as a suitable mitigating option for several existing problems while causing only limited additional costs.

> *"We believe that light-touch scheme should be paid for by the businesses themselves, with some sort of annual registration fee […]. The body set up to manage this or perhaps the local councils would coordinate the guidelines for these properties and carry out random checks, particularly of high-risk properties. Doing nothing is not an option and self-certification, which is in effect what we have today, is clearly ineffective. It is too easy for anyone to advertise anything on the internet, without complying with any of the basic legal requirements. Heavy handed Statutory Licensing at the other extreme is not necessary at this stage."* (Organisational respondent)

Taxing short-term let owners

12.9. The second most commonly raised theme (by around 15% of respondents) discussed mitigation through taxing short-term let owners. Types of taxation mentioned include council tax, sometimes rates of 200% are discussed, as well as imposing higher business rate contributions onto owners. Such additional financial means would then influence both the initial number of people considering converting their houses into short-lets – with knock-on effects on housing supply and prices – as well as investments into local communities and funding costs resulting from newly introduced licensing schemes.

> *"At least some of these costs could be covered by requiring holiday lets to pay council tax (rather than business rates as currently). We support the proposals in the Levelling Up and Regeneration Bill to […] allow local authorities to charge an additional 100% council tax on second homes but believe that this should go further and that local authorities should be given the discretion to increase council tax by up to 300% […]. This additional council tax should be ring-fenced for projects that support local housing needs."* (Organisational respondent)

13. Evidence outside of England

Question 11: Do you have any insight or evidence on the impact of schemes that are already running, or approaches taken elsewhere in the world?

Key findings

- The most common examples discussed were Wales and Scotland, while a smaller number of respondents mentioned examples outside the UK (especially Spain, France and Portugal).
- Few respondents referenced specific schemes or approaches in their answers. Of respondents who did mention these, most stated their understanding of the specific scheme (without expressing their opinion).
- Respondents largely did not provide details on the strengths or weaknesses of different schemes, though many felt the schemes were ineffective, had restricted the short-term lets market or placed an additional burden on short-term lets hosts.
- A small number of respondents discussed positive impacts or aspects of different schemes.

Qualitative analysis

13.1. There were 1,702 responses to this open-format question (1,548 from individuals and 154 from organisations). Most responses did not discuss existing schemes or approaches taken elsewhere in the world and instead stated they did not have any insight or expressed their broader opinion on short-term lets. Around 20% of respondents specifically mentioned referenced schemes outside of England, and most of these respondents acknowledged they had heard of the scheme (or the scheme's existence) without providing a more detailed discussion of their perspectives on these international approaches.

Evidence from Wales and Scotland

13.2. 5% of respondents (75 in total) mentioned the Welsh government, which had introduced (i) a package of measures in July 2022 granting local planning authorities the power to make amendments to the requirements of planning permissions. Specifically, this affects the classification of homes as primary residences, second homes and holiday lets (with planning permission required to re-classify a property). Additionally,(ii) changes are effective from April 2023 regarding the criteria for self-catering accommodation to be eligible for business rates (instead of council tax). 3% of respondents (42 in total) mentioned the Scottish government, which will introduce a licensing requirement for existing short-term let accommodation by April 2023.

13.3. Almost all respondents expressed a negative opinion towards the Welsh and Scottish government schemes, claiming these schemes had adverse effects such as increased costs for hosts, concentration of market power, decrease in property investment and undue pressure and lack of clarity for local councils. These respondents largely agreed that these schemes were overly complex or too broad, with hosts feeling unfairly disadvantaged or overburdened.

> *"I am aware that friends have stopped letting their houses in Scotland due to their registration scheme. It's not that they don't want to comply, they usually have already provided all the safety precautions needed, they just don't want to be regulated any more than they already are."* (Individual respondent)

> *"I understand that many operators are pulling out of the market in Wales, which has recently been regulated. This will lead to a crash in availability in 2023 and 2024, leading to much higher rates that holiday-makers will have to pay, as well as a loss of income for the areas, as less people are able to stay there."* (Organisational respondent)

Evidence from outside the UK

13.4. Respondents mentioned a total of 26 different countries. Spain, France and Portugal were the most commonly cited countries, followed by Greece, Italy and the Netherlands (though no individual country was discussed by more than 2% of respondents).

13.5. In general, respondents either expressed a neutral position towards the specific approaches cited in the response (around 40% of respondents) or discussed the negative consequences associated with these approaches (around 20% of respondents). For the latter, these respondents were most commonly hosts operating in the short-term and holiday letting market. Negative consequences raised by respondents included restricting the short-term letting market by increasing the burden of operating short-term lets or otherwise incentivising hosts to operate in legal grey areas or illegally.

> *"Where a licensing scheme has been brought in for some areas of Spain, limiting accommodation to only those that could obtain a license, it's resulted in large numbers of quality self - catering properties being made unavailable to the general public, who have no desire to stay in the large hotels that obtain the licenses. Some owners try to operate beneath the radar and ask you to pretend you are a friend staying rather than a paying guest, if they have been unable to obtain the necessary license."* (Individual respondent)

> *"The Portuguese scheme is mandatory and sold to hosts as a way of enhancing confidence in guests making bookings.[…] The scheme's main purpose was to ensure that hosts were complying with tax reporting laws but with tax reporting from the portals to the tax authority being automatic and no cash transactions taking place this is overkill. This compliance burden adds about 30 minutes to 1 hours of admin to each booking. It is unpaid work and in many cases duplicating work done (passport check at airport)."* (Individual respondent)

13.6. In addition, the aim of avoiding tax evasion through the legal imposition of declaring the rental space is also mentioned as an advantage of imposing tighter licensing schemes in England.

> *"Spain permit 'urbanization' zones for non-national residences. The higher rates charged on these subsidise the local accommodation. This reduces resentment, provides employment and investment in an area. Both locals and holidaymakers enjoy some benefit with neither benefitting exclusively at the expense of the other."* (Organisational respondent)

13.7. Around one-third of respondents focused on the positive impacts of different regulatory approaches. For these respondents, the existence of strict regulations and the need for a license as good practices followed in other countries produce benefits for rental businesses (in the form of increased confidence from prospective tenants that the appropriate procedures are being followed) and for the community at large (in the form of proceeds reverting to the local councils and overall betterment of the area).

> *"Yes, Portugal - they are very strict about private holiday lets and safety, annual checks are required for fire, safety, water quality in a pool, accounting and tax as well as usage by the owner particularly to avoid higher levels of tax. There are no lifts but clearly all fire protection and fire safety equipment is in place, including fire blankets, fire extinguishers, fire buckets, smoke and Carbon monoxide detectors etc. They have to be registered and licensed and are issued a permit to let."* (Individual respondent)

> *"I am aware that in Berlin if landlords wish to rent a second home they have apply for a special permit to do so and if they don't and are found out can face a fine of up to €500,000. This does not forbid the renting of second or untenanted properties but regulates this and I find this to be fair and just."* (Individual respondent)

14. Impact of the Deregulation Act 2015

Question 12: What has been the impact of the Deregulation Act 2015, specifically changes made by section 44 to the Greater London Council (General Powers) Act 1973?

Key findings

- The most common theme raised by respondents was insufficient enforcement of section 44 due to lack of consistent data collection or monitoring, which could encourage landlords to keep circumventing the 90-day rule. Respondents often suggested that more inspections were necessary for section 44 to be effective.
- Other respondents felt that section 44 did not lead to meaningful changes in housing availability, rent prices, anti-social behaviour and other negative impacts of short-term lets.
- London local authorities responding to this question emphasised the continued growth in the number of properties used for short-term lets and the lack of effectiveness for the 90-day rule in disincentivising the transformation of homes to short-term lets.

Qualitative analysis

14.1. There were 1,402 responses to this open-format question (1,282 from individuals and 120 from organisations). The key themes raised in responses are detailed below in order of highest to lowest frequency within the responses. Over 80% of responses were variations on "Don't know" or "No comment" or only re-stated their understanding of the 90-day rule without offering an opinion, and these comments have been excluded from the qualitative analysis below.

Lack of effectiveness

14.2. The most frequent theme (raised by around two-thirds of respondents to the question) was the 90-day rule's lack of effectiveness in reducing growth in the number of short-term lets or mitigating the potential negative impacts of short-term lets (with respondents mentioning problems such as housing availability, rent prices, lacking planning and licensing rules, as well as anti-social behaviour). This problem is explained to be particularly prominent in inner city boroughs, most frequently Westminster, Kensington and Chelsea, Camden, and Tower Hamlets. Few changes had been registered by respondents since the introduction of the policy and, notably, only a small number of responses highlighted the policy to have had a positive impact.

> *"The data since deregulation has shown day caps to be a very poor solution to [short-term lets'] impact on housing. We reject the London model […]. Furthermore, a house that is short-term let for 90 days has little use as a permanent home for long-term renters for the remainder of the year."* (Organisational response)

> *"[…] research suggests that the changes have not stopped the growth in short term lettings. Also, that multiple online letting platforms mean property owners can circumvent the rules. In addition, that enforcement of this legislation is proving to be an impossible task*

> *for local authorities, who do not have access to the information they need to proactively engage with the issue. Research by Camden Council in 2020 estimated that almost half of the data they collected on homes available for short-term lets breached the 90-day limit."* (Organisational response)

Difficulties around enforcement

14.3. The second most frequent theme (raised by around one-third of respondents, in particular by all London-based organisational respondents), was difficulties enforcing the 90-day rule. While some respondents acknowledged that the 90-day rule was beneficial in theory by ensuring short-term lets focused on existing owner-occupied homes, almost all respondents felt that the lack of data and investigative powers meant that the enforcement of breaches was extremely difficult in practice and relied primarily on resident complaints.

> *"If this 90-rule were enforceable, it would keep unscrupulous landlords and professional STL [short-term let] investors largely out of the STL market and unless they could make sufficient income in 90 days, which is unlikely. The problem of course, is that given the current suite of regulatory tools and resources, it is not possible to get good data on the STL sector, much less to regulate it."* (Organisational response)

14.4. Respondents also argued that proactive inspections were necessary to detect individual breaches of planning, licensing, health and safety, or other regulations.

> *"Any registration scheme must be accompanied by […] data on hosts details, property addresses, and documentation to demonstrate compliance with fire safety and other certificates."* (Organisational response)

> *"People will do the bare minimum if anything unless it's regulated and checked periodically."* (Individual response)

Other themes

14.5. A small number of respondents (less than 10% of those who answered the question) specifically took a position on whether they supported or opposed the 90-day rule. Some of these respondents felt that the rule had disincentivised investment and limited owner flexibility to let out their properties, while others thought the rule was reasonable. In general, these responses tended to be short, and almost no evidence (either quantitative or anecdotal) was provided to support either positive or negative positions, as it was not clear if respondents had first-hand experience in the London short-term lets market or were commenting on others' experiences or what they had read about elsewhere

Appendix

Quantitative responses by detailed respondent type

Table 1. Question 3(a): How do you assess levels of compliance with regulations on fire safety within the short-term and holiday letting market in England?

Respondent type	Compliance is very good	Compliance is good	Compliance is fair	Compliance is poor	Compliance is very poor
Host operating in the short-term and holiday letting market	749 (48%)	557 (36%)	184 (12%)	67 (4%)	10 (1%)
Member of the public	128 (40%)	77 (24%)	34 (12%)	43 (13%)	42 (13%)
Owner / employee of a tourism accommodation business	124 (39%)	75 (24%)	42 (18%)	59 (19%)	17 (5%)
Other (individual)	19 (29%)	18 (27%)	12 (10%)	10 (15%)	7 (11%)
All individuals	**1020 (45%)**	**727 (32%)**	**272 (12%)**	**179 (8%)**	**76 (3%)**
Guest accommodation operator	24 (29%)	16 (19%)	15 (13%)	24 (29%)	4 (5%)
Short-term and holiday let service company	31 (41%)	10 (13%)	12 (16%)	18 (24%)	5 (7%)
Other (organisation) [10]	8 (18%)	7 (16%)	4 (9%)	18 (41%)	7 (16%)
All organisations	**63 (31%)**	**33 (16%)**	**31 (15%)**	**60 (30%)**	**16 (8%)**
All respondents	**1083 (44%)**	**760 (31%)**	**303 (12%)**	**239 (10%)**	**92 (4%)**

[10] These include organisational respondents who identified as (i) destination management organisations, (ii) enforcement agencies, (iii) government departments or arms length bodies, (iv) local authorities, (v) marketing/advertising platforms or (iv) tourism representative bodies, or selected “Other” when asked to identify their respondent type.

Table 2. Question 3(b): How do you assess levels of compliance with regulations on gas safety within the short-term and holiday letting market in England?

Respondent type	Compliance is very good	Compliance is good	Compliance is fair	Compliance is poor	Compliance is very poor
Host operating in the short-term and holiday letting market	713 (56%)	359 (28%)	134 (11%)	49 (4%)	8 (1%)
Member of the public	125 (45%)	67 (24%)	31 (11%)	22 (8%)	31 (11%)
Owner / employee of a tourism accommodation business	103 (44%)	45 (19%)	33 (14%)	45 (19%)	10 (4%)
Other (individual)	20 (39%)	12 (24%)	11 (22%)	2 (4%)	6 (12%)
All individuals	**961 (53%)**	**483 (26%)**	**209 (11%)**	**118 (6%)**	**55 (3%)**
Guest accommodation operator	22 (33%)	17 (26%)	9 (14%)	15 (23%)	3 (5%)
Short-term and holiday let service company	34 (49%)	12 (17%)	11 (16%)	11 (16%)	2 (3%)
Other (organisation)	8 (24%)	6 (18%)	4 (12%)	10 (29%)	6 (18%)
All organisations	**64 (38%)**	**35 (21%)**	**24 (14%)**	**36 (21%)**	**11 (6%)**
All respondents	**1025 (51%)**	**518 (26%)**	**233 (12%)**	**154 (8%)**	**66 (3%)**

Table 3. Question 3(c): How do you assess levels of compliance with regulations on health and safety within the short-term and holiday letting market in England?

Respondent type	Compliance is very good	Compliance is good	Compliance is fair	Compliance is poor	Compliance is very poor
Host operating in the short-term and holiday letting market	618 (42%)	497 (34%)	237 (16%)	89 (6%)	17 (1%)
Member of the public	113 (38%)	76 (26%)	26 (9%)	43 (14%)	39 (13%)
Owner / employee of a tourism accommodation business	110 (37%)	66 (22%)	47 (16%)	56 (19%)	16 (5%)
Other (individual)	17 (30%)	19 (33%)	10 (18%)	6 (11%)	5 (9%)
All individuals	**858 (41%)**	**658 (31%)**	**320 (15%)**	**194 (9%)**	**77 (4%)**
Guest accommodation operator	19 (23%)	18 (22%)	18 (22%)	23 (28%)	4 (5%)
Short-term and holiday let service company	31 (43%)	8 (11%)	10 (14%)	19 (26%)	4 (6%)
Other (organisation)	8 (23%)	6 (17%)	3 (9%)	10 (29%)	8 (23%)
All organisations	**58 (31%)**	**32 (17%)**	**31 (16%)**	**52 (28%)**	**16 (8%)**
All respondents	**916 (40%)**	**690 (30%)**	**351 (15%)**	**246 (11%)**	**93 (4%)**

Table 4. Question 3(d): How do you assess levels of compliance with regulations on food and drink within the short-term and holiday letting market in England?

Respondent type	Compliance is very good	Compliance is good	Compliance is fair	Compliance is poor	Compliance is very poor
Host operating in the short-term and holiday letting market	375 (48%)	239 (31%)	115 (15%)	46 (6%)	7 (1%)
Member of the public	82 (41%)	52 (26%)	26 (13%)	10 (5%)	28 (14%)
Owner / employee of a tourism accommodation business	63 (36%)	36 (21%)	29 (17%)	40 (23%)	7 (4%)
Other (individual)	15 (43%)	6 (17%)	6 (17%)	4 (11%)	4 (11%)
All individuals	**535 (45%)**	**333 (28%)**	**176 (15%)**	**100 (8%)**	**46 (4%)**
Guest accommodation operator	14 (28%)	14 (28%)	8 (16%)	11 (22%)	3 (6%)
Short-term and holiday let service company	17 (45%)	6 (16%)	7 (18%)	6 (16%)	2 (5%)
Other (organisation)	5 (19%)	3 (11%)	5 (19%)	7 (26%)	7 (26%)
All organisations	**36 (31%)**	**23 (20%)**	**20 (17%)**	**24 (21%)**	**12 (10%)**
All respondents	**571 (44%)**	**356 (27%)**	**196 (15%)**	**124 (10%)**	**58 (4%)**

Table 5. Question 4: Do you consider there to be a problem with breach of contractual agreements in the short-term and holiday letting market in England?

Respondent type	Yes, this is a major problem	Yes, but this is only a minor problem	No, there is no problem
Host operating in the short-term and holiday letting market	68 (7%)	259 (25%)	713 (69%)
Member of the public	80 (31%)	46 (18%)	135 (52%)
Owner / employee of a tourism accommodation business	41 (20%)	74 (36%)	93 (45%)
Other (individual)	13 (32%)	8 (20%)	20 (49%)
All individuals	**202 (13%)**	**387 (25%)**	**961 (62%)**
Guest accommodation operator	11 (20%)	25 (46%)	18 (33%)
Short-term and holiday let service company	10 (17%)	27 (46%)	22 (37%)
Other (organisation)	15 (48%)	11 (35%)	5 (16%)
All organisations	**36 (25%)**	**63 (44%)**	**45 (31%)**
All respondents	**238 (14%)**	**450 (27%)**	**1006 (59%)**

Table 6. Question 5: Do you consider there to be other legal provisions concerning the supply of short-term and holiday letting to paying guests which are not covered elsewhere in this call for evidence but where there are issues with awareness, compliance and/or enforcement?

Respondent type	Yes	No
Host operating in the short-term and holiday letting market	226 (24%)	731 (76%)
Member of the public	79 (38%)	128 (62%)
Owner / employee of a tourism accommodation business	110 (51%)	105 (49%)
Other (individual)	32 (64%)	18 (36%)
All individuals	**447 (31%)**	**982 (69%)**
Guest accommodation operator	38 (73%)	14 (27%)
Short-term and holiday let service company	23 (51%)	22 (49%)
Other (organisation)	29 (85%)	5 (15%)
All organisations	**90 (69%)**	**41 (31%)**
All respondents	**537 (34%)**	**1023 (66%)**

Table 7. Question 6: Do you consider the increase in short-term and holiday letting in England to have had adverse consequences on the housing market?

Respondent type	Yes, this is a major problem	Yes, but this is only a minor problem	No, there is no problem
Host operating in the short-term and holiday letting market	392 (23%)	648 (38%)	673 (39%)
Member of the public	268 (57%)	57 (12%)	147 (31%)
Owner / employee of a tourism accommodation business	148 (43%)	116 (34%)	81 (23%)
Other (individual)	59 (63%)	15 (16%)	20 (21%)
All individuals	**867 (33%)**	**836 (32%)**	**921 (35%)**
Guest accommodation operator	42 (49%)	19 (22%)	25 (29%)
Short-term and holiday let service company	15 (20%)	29 (39%)	30 (41%)
Other (organisation)	68 (81%)	11 (13%)	5 (6%)
All organisations	**125 (51%)**	**59 (24%)**	**60 (25%)**
All respondents	**992 (35%)**	**895 (31%)**	**981 (34%)**

Table 8. Question 7: Do you consider noise, anti-social or other nuisance behaviour in short-term and holiday lets in England to be a problem?

Respondent type	Yes, this is a major problem	Yes, but this is only a minor problem	No, there is no problem
Host operating in the short-term and holiday letting market	52 (3%)	478 (30%)	1082 (67%)
Member of the public	172 (39%)	87 (20%)	179 (41%)
Owner / employee of a tourism accommodation business	23 (8%)	122 (41%)	156 (52%)
Other (individual)	27 (31%)	30 (35%)	29 (34%)
All individuals	**274 (11%)**	**717 (29%)**	**1446 (59%)**
Guest accommodation operator	8 (10%)	40 (50%)	32 (40%)
Short-term and holiday let service company	4 (5%)	34 (46%)	36 (49%)
Other (organisation)	38 (50%)	31 (41%)	7 (9%)
All organisations	**50 (22%)**	**105 (46%)**	**75 (33%)**
All respondents	**324 (12%)**	**822 (31%)**	**1521 (57%)**

Table 9. Question 8: Aside from the impacts on housing and incidents of anti-social/nuisance behaviour, do you consider the increase in short-term and holiday letting in England to have had other adverse impacts on local communities and residents?

Respondent type	Yes	No
Host operating in the short-term and holiday letting market	320 (19%)	1381 (81%)
Member of the public	251 (56%)	201 (44%)
Owner / employee of a tourism accommodation business	145 (44%)	186 (56%)
Other (individual)	55 (58%)	40 (42%)
All individuals	**771 (30%)**	**1808 (70%)**
Guest accommodation operator	36 (49%)	38 (51%)
Short-term and holiday let service company	24 (33%)	48 (67%)
Other (organisation)	68 (85%)	12 (15%)
All organisations	**128 (57%)**	**98 (43%)**
All respondents	**899 (32%)**	**1906 (68%)**

Table 10. Question 9: Which of the following do you consider to be the most appropriate form of response in the short-term letting market?

For the table below, the column headers have been recoded as follows:

1. Develop a licencing scheme with physical checks of the premises
2. Develop a registration scheme with light-touch checks
3. Develop a self-certification registration scheme
4. Do nothing
5. Provide more information to the sector
6. Regulatory alternative to a registration system, such as extension of the Deregulation Act 2015

Respondent type	Option 1	Option 2	Option 3	Option 4	Option 5	Option 6
Host operating in the short-term and holiday letting market	111 (5%)	492 (24%)	484 (23%)	488 (24%)	451 (22%)	49 (2%)
Member of the public	174 (34%)	44 (8%)	37 (7%)	122 (24%)	70 (14%)	71 (14%)
Owner / employee of a tourism accommodation business	57 (15%)	150 (38%)	52 (13%)	59 (15%)	55 (14%)	18 (5%)
Other (individual)	23 (21%)	31 (28%)	10 (9%)	12 (11%)	17 (15%)	18 (16%)
All individuals	**365 (12%)**	**717 (23%)**	**583 (19%)**	**681 (22%)**	**593 (19%)**	**156 (5%)**
Guest accommodation operator	18 (18%)	41 (42%)	9 (9%)	15 (15%)	11 (11%)	4 (4%)
Short-term and holiday let service company	14 (17%)	28 (34%)	11 (13%)	10 (12%)	16 (19%)	4 (5%)
Other (organisation)	52 (53%)	29 (29%)	7 (7%)	4 (4%)	2 (2%)	5 (5%)
All organisations	**84 (30%)**	**98 (35%)**	**27 (10%)**	**29 (10%)**	**29 (10%)**	**13 (5%)**
All respondents	**449 (13%)**	**815 (24%)**	**610 (18%)**	**710 (21%)**	**622 (18%)**	**169 (5%)**

Cross-tabulation: Question 9 and Question 3(a)

Question 3(a): How do you assess levels of compliance with regulations on fire safety within the short-term and holiday letting market in England?

Table 11. Respondent type: Host operating in the short-term and holiday letting market.

Scheme preference (Q9)	Compliance is very good	Compliance is good	Compliance is fair	Compliance is poor	Compliance is very poor
Develop a licensing scheme with physical checks of the premises	26 (34%)	18 (23%)	16 (21%)	12 (16%)	5 (6%)
Develop a registration scheme with light-touch checks	123 (36%)	117 (34%)	59 (17%)	41 (12%)	1 (0%)
Develop a self-certification registration scheme	153 (44%)	146 (42%)	42 (12%)	7 (2%)	2 (1%)
Do nothing	238 (63%)	117 (31%)	25 (7%)	(0%)	(0%)
Provide more information to the sector	172 (50%)	138 (40%)	33 (10%)	3 (1%)	1 (0%)
Regulatory alternative to a registration system	16 (47%)	8 (24%)	7 (21%)	3 (9%)	(0%)

Table 12. Respondent type: Member of the public

Scheme preference (Q9)	Compliance is very good	Compliance is good	Compliance is fair	Compliance is poor	Compliance is very poor
Develop a licensing scheme with physical checks of the premises	6 (7%)	7 (8%)	15 (17%)	31 (35%)	30 (34%)
Develop a registration scheme with light-touch checks	1 (5%)	12 (57%)	5 (24%)	2 (10%)	1 (5%)
Develop a self-certification registration scheme	13 (45%)	11 (38%)	4 (14%)	1 (3%)	(0%)
Do nothing	66 (67%)	25 (26%)	5 (5%)	1 (1%)	1 (1%)
Provide more information to the sector	34 (62%)	16 (29%)	3 (5%)	1 (2%)	1 (2%)
Regulatory alternative to a registration system	4 (15%)	5 (19%)	2 (8%)	7 (27%)	8 (31%)

Table 13. Respondent type: Owner/employee of a tourism accommodation business

Scheme preference (Q9)	Compliance is very good	Compliance is good	Compliance is fair	Compliance is poor	Compliance is very poor
Develop a licensing scheme with physical checks of the premises	13 (31%)	7 (17%)	6 (14%)	7 (17%)	9 (21%)
Develop a registration scheme with light-touch checks	27 (23%)	14 (12%)	22 (19%)	48 (41%)	6 (5%)
Develop a self-certification registration scheme	12 (27%)	24 (53%)	7 (16%)	1 (2%)	1 (2%)
Do nothing	42 (81%)	8 (15%)	2 (4%)	(0%)	(0%)
Provide more information to the sector	22 (49%)	18 (40%)	4 (9%)	1 (2%)	(0%)
Regulatory alternative to a registration system	5 (45%)	2 (18%)	1 (9%)	2 (18%)	1 (9%)

Table 14. Respondent type: Other (individual)

Scheme preference (Q9)	Compliance is very good	Compliance is good	Compliance is fair	Compliance is poor	Compliance is very poor
Develop a licensing scheme with physical checks of the premises	1 (9%)	(0%)	2 (18%)	5 (45%)	3 (27%)
Develop a registration scheme with light-touch checks	5 (28%)	4 (22%)	4 (22%)	4 (22%)	1 (6%)
Develop a self-certification registration scheme	3 (38%)	4 (50%)	(0%)	1 (13%)	(0%)
Do nothing	4 (50%)	4 (50%)	(0%)	(0%)	(0%)
Provide more information to the sector	5 (42%)	4 (33%)	3 (25%)	(0%)	(0%)
Regulatory alternative to a registration system	(0%)	2 (29%)	2 (29%)	(0%)	3 (43%)

Table 15. Respondent type: All individuals

Scheme preference (Q9)	Compliance is very good	Compliance is good	Compliance is fair	Compliance is poor	Compliance is very poor
Develop a licensing scheme with physical checks of the premises	46 (21%)	32 (15%)	39 (18%)	55 (25%)	47 (21%)
Develop a registration scheme with light-touch checks	156 (31%)	147 (30%)	90 (18%)	95 (19%)	9 (2%)
Develop a self-certification registration scheme	181 (42%)	185 (43%)	53 (12%)	10 (2%)	3 (1%)
Do nothing	350 (65%)	154 (29%)	32 (6%)	1 (0%)	1 (0%)
Provide more information to the sector	233 (51%)	176 (38%)	43 (9%)	5 (1%)	2 (0%)
Regulatory alternative to a registration system	25 (32%)	17 (22%)	12 (15%)	12 (15%)	12 (15%)

Table 16. Respondent type: Guest accommodation operators

Scheme preference (Q9)	Compliance is very good	Compliance is good	Compliance is fair	Compliance is poor	Compliance is very poor
Develop a licensing scheme with physical checks of the premises	1 (9%)	1 (9%)	2 (18%)	4 (36%)	3 (27%)
Develop a registration scheme with light-touch checks	4 (11%)	4 (11%)	9 (26%)	18 (51%)	(0%)
Develop a self-certification registration scheme	7 (78%)	2 (22%)	(0%)	(0%)	(0%)
Do nothing	7 (50%)	5 (36%)	2 (14%)	(0%)	(0%)
Provide more information to the sector	4 (40%)	4 (40%)	2 (20%)	(0%)	(0%)
Regulatory alternative to a registration system	1 (25%)	(0%)	(0%)	2 (50%)	1 (25%)

Table 17. Respondent type: Short-term and holiday let service companies

Scheme preference (Q9)	Compliance is very good	Compliance is good	Compliance is fair	Compliance is poor	Compliance is very poor
Develop a licensing scheme with physical checks of the premises	6 (50%)	(0%)	2 (17%)	2 (17%)	2 (17%)
Develop a registration scheme with light-touch checks	3 (12%)	2 (8%)	6 (23%)	12 (46%)	3 (12%)
Develop a self-certification registration scheme	4 (40%)	3 (30%)	(0%)	3 (30%)	(0%)
Do nothing	7 (78%)	(0%)	2 (22%)	(0%)	(0%)
Provide more information to the sector	7 (50%)	5 (36%)	2 (14%)	(0%)	(0%)
Regulatory alternative to a registration system	2 (67%)	(0%)	(0%)	1 (33%)	(0%)

Table 18. Respondent type: Other organisations

Scheme preference (Q9)	Compliance is very good	Compliance is good	Compliance is fair	Compliance is poor	Compliance is very poor
Develop a licensing scheme with physical checks of the premises	1 (5%)	(0%)	2 (11%)	11 (58%)	5 (26%)
Develop a registration scheme with light-touch checks	(0%)	4 (27%)	2 (13%)	7 (47%)	2 (13%)
Develop a self-certification registration scheme	4 (80%)	1 (20%)	(0%)	(0%)	(0%)
Do nothing	1 (33%)	2 (67%)	(0%)	(0%)	(0%)
Provide more information to the sector	2 (100%)	(0%)	(0%)	(0%)	(0%)

Table 19. Respondent type: All organisations

Scheme preference (Q9)	Compliance is very good	Compliance is good	Compliance is fair	Compliance is poor	Compliance is very poor
Develop a licensing scheme with physical checks of the premises	8 (19%)	1 (2%)	6 (14%)	17 (40%)	10 (24%)
Develop a registration scheme with light-touch checks	7 (9%)	10 (13%)	17 (22%)	37 (49%)	5 (7%)
Develop a self-certification registration scheme	15 (63%)	6 (25%)	(0%)	3 (13%)	(0%)
Do nothing	15 (58%)	7 (27%)	4 (15%)	(0%)	(0%)
Provide more information to the sector	13 (50%)	9 (35%)	4 (15%)	(0%)	(0%)
Regulatory alternative to a registration system	3 (43%)	(0%)	(0%)	3 (43%)	1 (14%)

Cross-tabulation: Question 9 and Question 3(b)

Question 3(b): How do you assess levels of compliance with regulations on gas safety within the short-term and holiday letting market in England?

Table 20. Respondent type: Host operating in the short-term and holiday letting market.

Scheme preference (Q9)	Compliance is very good	Compliance is good	Compliance is fair	Compliance is poor	Compliance is very poor
Develop a licensing scheme with physical checks of the premises	23 (40%)	13 (22%)	14 (24%)	6 (10%)	2 (3%)
Develop a registration scheme with light-touch checks	122 (45%)	79 (29%)	43 (16%)	28 (10%)	(0%)
Develop a self-certification registration scheme	146 (53%)	86 (31%)	32 (12%)	9 (3%)	3 (1%)
Do nothing	222 (70%)	77 (24%)	20 (6%)	(0%)	(0%)
Provide more information to the sector	173 (59%)	91 (31%)	23 (8%)	4 (1%)	(0%)
Regulatory alternative to a registration system	11 (48%)	8 (35%)	1 (4%)	2 (9%)	1 (4%)

Table 21. Respondent type: Member of the public

Scheme preference (Q9)	Compliance is very good	Compliance is good	Compliance is fair	Compliance is poor	Compliance is very poor
Develop a licensing scheme with physical checks of the premises	5 (7%)	8 (12%)	20 (29%)	16 (23%)	20 (29%)
Develop a registration scheme with light-touch checks	7 (47%)	6 (40%)	(0%)	1 (7%)	1 (7%)
Develop a self-certification registration scheme	16 (55%)	11 (38%)	1 (3%)	1 (3%)	(0%)
Do nothing	61 (70%)	23 (26%)	2 (2%)	1 (1%)	(0%)
Provide more information to the sector	30 (58%)	15 (29%)	5 (10%)	1 (2%)	1 (2%)
Regulatory alternative to a registration system	3 (15%)	4 (20%)	3 (15%)	2 (10%)	8 (40%)

Table 22. Respondent type: Owner/employee of a tourism accommodation business

Scheme preference (Q9)	Compliance is very good	Compliance is good	Compliance is fair	Compliance is poor	Compliance is very poor
Develop a licensing scheme with physical checks of the premises	9 (32%)	4 (14%)	3 (11%)	6 (21%)	6 (21%)
Develop a registration scheme with light-touch checks	19 (22%)	9 (10%)	21 (24%)	35 (40%)	3 (3%)
Develop a self-certification registration scheme	18 (49%)	14 (38%)	4 (11%)	1 (3%)	(0%)
Do nothing	30 (81%)	5 (14%)	2 (5%)	(0%)	(0%)
Provide more information to the sector	21 (58%)	10 (28%)	3 (8%)	2 (6%)	(0%)
Regulatory alternative to a registration system	3 (43%)	2 (29%)	(0%)	1 (14%)	1 (14%)

Table 23. Respondent type: Other (individual)

Scheme preference (Q9)	Compliance is very good	Compliance is good	Compliance is fair	Compliance is poor	Compliance is very poor
Develop a licensing scheme with physical checks of the premises	(0%)	(0%)	2 (33%)	1 (17%)	3 (50%)
Develop a registration scheme with light-touch checks	7 (41%)	1 (6%)	7 (41%)	1 (6%)	1 (6%)
Develop a self-certification registration scheme	4 (67%)	2 (33%)	(0%)	(0%)	(0%)
Do nothing	6 (67%)	3 (33%)	(0%)	(0%)	(0%)
Provide more information to the sector	3 (38%)	3 (38%)	2 (25%)	(0%)	(0%)
Regulatory alternative to a registration system	(0%)	3 (60%)	(0%)	(0%)	2 (40%)

Table 24. Respondent type: All individuals

Scheme preference (Q9)	Compliance is very good	Compliance is good	Compliance is fair	Compliance is poor	Compliance is very poor
Develop a licensing scheme with physical checks of the premises	37 (23%)	25 (16%)	39 (24%)	29 (18%)	31 (19%)
Develop a registration scheme with light-touch checks	155 (40%)	95 (24%)	71 (18%)	65 (17%)	5 (1%)
Develop a self-certification registration scheme	184 (53%)	113 (32%)	37 (11%)	11 (3%)	3 (1%)
Do nothing	319 (71%)	108 (24%)	24 (5%)	1 (0%)	(0%)
Provide more information to the sector	227 (59%)	119 (31%)	33 (9%)	7 (2%)	1 (0%)
Regulatory alternative to a registration system	17 (31%)	17 (31%)	4 (7%)	5 (9%)	12 (22%)

Table 25. Respondent type: Guest accommodation operators

Scheme preference (Q9)	Compliance is very good	Compliance is good	Compliance is fair	Compliance is poor	Compliance is very poor
Develop a licensing scheme with physical checks of the premises	(0%)	2 (22%)	5 (56%)	(0%)	2 (22%)
Develop a registration scheme with light-touch checks	4 (15%)	7 (26%)	2 (7%)	14 (52%)	(0%)
Develop a self-certification registration scheme	7 (100%)	(0%)	(0%)	(0%)	(0%)
Do nothing	5 (45%)	4 (36%)	2 (18%)	(0%)	(0%)
Provide more information to the sector	5 (63%)	3 (38%)	(0%)	(0%)	(0%)
Regulatory alternative to a registration system	1 (25%)	1 (25%)	(0%)	1 (25%)	1 (25%)

Table 26. Respondent type: Short-term and holiday let service companies

Scheme preference (Q9)	Compliance is very good	Compliance is good	Compliance is fair	Compliance is poor	Compliance is very poor
Develop a licensing scheme with physical checks of the premises	5 (42%)	1 (8%)	3 (25%)	1 (8%)	2 (17%)
Develop a registration scheme with light-touch checks	3 (13%)	5 (22%)	6 (26%)	9 (39%)	(0%)
Develop a self-certification registration scheme	4 (44%)	5 (56%)	(0%)	(0%)	(0%)
Do nothing	8 (89%)	(0%)	1 (11%)	(0%)	(0%)
Provide more information to the sector	10 (83%)	1 (8%)	1 (8%)	(0%)	(0%)
Regulatory alternative to a registration system	3 (75%)	(0%)	(0%)	1 (25%)	(0%)

Table 27. Respondent type: Other organisations

Scheme preference (Q9)	Compliance is very good	Compliance is good	Compliance is fair	Compliance is poor	Compliance is very poor
Develop a licensing scheme with physical checks of the premises	1 (8%)	(0%)	3 (23%)	5 (38%)	4 (31%)
Develop a registration scheme with light-touch checks	(0%)	3 (27%)	1 (9%)	5 (45%)	2 (18%)
Develop a self-certification registration scheme	4 (80%)	1 (20%)	(0%)	(0%)	(0%)
Do nothing	1 (33%)	2 (67%)	(0%)	(0%)	(0%)
Provide more information to the sector	2 (100%)	(0%)	(0%)	(0%)	(0%)

Table 28. Respondent type: All organisations

Scheme preference (Q9)	Compliance is very good	Compliance is good	Compliance is fair	Compliance is poor	Compliance is very poor
Develop a licensing scheme with physical checks of the premises	6 (18%)	3 (9%)	11 (32%)	6 (18%)	8 (24%)
Develop a registration scheme with light-touch checks	7 (11%)	15 (25%)	9 (15%)	28 (46%)	2 (3%)
Develop a self-certification registration scheme	15 (71%)	6 (29%)	(0%)	(0%)	(0%)
Do nothing	14 (61%)	6 (26%)	3 (13%)	(0%)	(0%)
Provide more information to the sector	17 (77%)	4 (18%)	1 (5%)	(0%)	(0%)
Regulatory alternative to a registration system	4 (50%)	1 (13%)	(0%)	2 (25%)	1 (13%)

Cross-tabulation: Question 9 and Question 3(c)

Question 3(c): How do you assess levels of compliance with regulations on health and safety within the short-term and holiday letting market in England?

Table 29. Respondent type: Host operating in the short-term and holiday letting market.

Scheme preference (Q9)	Compliance is very good	Compliance is good	Compliance is fair	Compliance is poor	Compliance is very poor
Develop a licensing scheme with physical checks of the premises	17 (25%)	15 (22%)	19 (28%)	15 (22%)	2 (3%)
Develop a registration scheme with light-touch checks	95 (30%)	96 (30%)	81 (25%)	41 (13%)	6 (2%)
Develop a self-certification registration scheme	122 (38%)	119 (37%)	62 (19%)	16 (5%)	3 (1%)
Do nothing	207 (58%)	119 (33%)	29 (8%)	(0%)	3 (1%)
Provide more information to the sector	145 (44%)	131 (40%)	39 (12%)	11 (3%)	(0%)
Regulatory alternative to a registration system	12 (38%)	9 (28%)	5 (16%)	5 (16%)	1 (3%)

Table 30. Respondent type: Member of the public

Scheme preference (Q9)	Compliance is very good	Compliance is good	Compliance is fair	Compliance is poor	Compliance is very poor
Develop a licensing scheme with physical checks of the premises	5 (6%)	5 (6%)	6 (8%)	35 (45%)	26 (34%)
Develop a registration scheme with light-touch checks	3 (18%)	9 (53%)	3 (18%)	1 (6%)	1 (6%)
Develop a self-certification registration scheme	11 (44%)	11 (44%)	2 (8%)	1 (4%)	(0%)
Do nothing	62 (66%)	25 (27%)	6 (6%)	1 (1%)	(0%)
Provide more information to the sector	30 (55%)	16 (29%)	7 (13%)	1 (2%)	1 (2%)
Regulatory alternative to a registration system	2 (8%)	7 (28%)	1 (4%)	4 (16%)	11 (44%)

Table 31. Respondent type: Owner/employee of a tourism accommodation business

Scheme preference (Q9)	Compliance is very good	Compliance is good	Compliance is fair	Compliance is poor	Compliance is very poor
Develop a licensing scheme with physical checks of the premises	10 (26%)	6 (15%)	10 (26%)	4 (10%)	9 (23%)
Develop a registration scheme with light-touch checks	24 (22%)	15 (14%)	21 (19%)	45 (41%)	6 (5%)
Develop a self-certification registration scheme	11 (28%)	19 (49%)	5 (13%)	4 (10%)	(0%)
Do nothing	41 (84%)	6 (12%)	2 (4%)	(0%)	(0%)
Provide more information to the sector	18 (43%)	16 (38%)	8 (19%)	(0%)	(0%)
Regulatory alternative to a registration system	3 (33%)	2 (22%)	1 (11%)	2 (22%)	1 (11%)

Table 32. Respondent type: Other (individual)

Scheme preference (Q9)	Compliance is very good	Compliance is good	Compliance is fair	Compliance is poor	Compliance is very poor
Develop a licensing scheme with physical checks of the premises	1 (14%)	(0%)	2 (29%)	1 (14%)	3 (43%)
Develop a registration scheme with light-touch checks	6 (32%)	4 (21%)	5 (26%)	3 (16%)	1 (5%)
Develop a self-certification registration scheme	2 (25%)	4 (50%)	(0%)	2 (25%)	(0%)
Do nothing	3 (38%)	5 (63%)	(0%)	(0%)	(0%)
Provide more information to the sector	4 (40%)	3 (30%)	3 (30%)	(0%)	(0%)
Regulatory alternative to a registration system	(0%)	3 (75%)	(0%)	(0%)	1 (25%)

Table 33. Respondent type: All individuals

Scheme preference (Q9)	Compliance is very good	Compliance is good	Compliance is fair	Compliance is poor	Compliance is very poor
Develop a licensing scheme with physical checks of the premises	33 (17%)	26 (14%)	37 (19%)	55 (29%)	40 (21%)
Develop a registration scheme with light-touch checks	128 (27%)	124 (27%)	110 (24%)	90 (19%)	14 (3%)
Develop a self-certification registration scheme	146 (37%)	153 (39%)	69 (18%)	23 (6%)	3 (1%)
Do nothing	313 (61%)	155 (30%)	37 (7%)	1 (0%)	3 (1%)
Provide more information to the sector	197 (45%)	166 (38%)	57 (13%)	12 (3%)	1 (0%)
Regulatory alternative to a registration system	17 (24%)	21 (30%)	7 (10%)	11 (16%)	14 (20%)

Table 34. Respondent type: Guest accommodation operators

Scheme preference (Q9)	Compliance is very good	Compliance is good	Compliance is fair	Compliance is poor	Compliance is very poor
Develop a licensing scheme with physical checks of the premises	(0%)	1 (9%)	6 (55%)	1 (9%)	3 (27%)
Develop a registration scheme with light-touch checks	4 (12%)	4 (12%)	7 (21%)	19 (56%)	(0%)
Develop a self-certification registration scheme	4 (44%)	4 (44%)	1 (11%)	(0%)	(0%)
Do nothing	7 (50%)	4 (29%)	3 (21%)	(0%)	(0%)
Provide more information to the sector	3 (30%)	5 (50%)	1 (10%)	1 (10%)	(0%)
Regulatory alternative to a registration system	1 (25%)	(0%)	(0%)	2 (50%)	1 (25%)

Table 35. Respondent type: Short-term and holiday let service companies

Scheme preference (Q9)	Compliance is very good	Compliance is good	Compliance is fair	Compliance is poor	Compliance is very poor
Develop a licensing scheme with physical checks of the premises	5 (42%)	(0%)	3 (25%)	2 (17%)	2 (17%)
Develop a registration scheme with light-touch checks	2 (9%)	1 (5%)	3 (14%)	14 (64%)	2 (9%)
Develop a self-certification registration scheme	6 (60%)	1 (10%)	1 (10%)	2 (20%)	(0%)
Do nothing	7 (78%)	1 (11%)	1 (11%)	(0%)	(0%)
Provide more information to the sector	7 (50%)	5 (36%)	2 (14%)	(0%)	(0%)
Regulatory alternative to a registration system	3 (75%)	(0%)	(0%)	1 (25%)	(0%)

Table 36. Respondent type: Other organisations

Scheme preference (Q9)	Compliance is very good	Compliance is good	Compliance is fair	Compliance is poor	Compliance is very poor
Develop a licensing scheme with physical checks of the premises	1 (8%)	(0%)	1 (8%)	6 (46%)	5 (38%)
Develop a registration scheme with light-touch checks	2 (17%)	2 (17%)	2 (17%)	4 (33%)	2 (17%)
Develop a self-certification registration scheme	3 (60%)	2 (40%)	(0%)	(0%)	(0%)
Do nothing	(0%)	2 (100%)	(0%)	(0%)	(0%)
Provide more information to the sector	2 (100%)	(0%)	(0%)	(0%)	(0%)

Table 37. Respondent type: All organisations

Scheme preference (Q9)	Compliance is very good	Compliance is good	Compliance is fair	Compliance is poor	Compliance is very poor
Develop a licensing scheme with physical checks of the premises	6 (17%)	1 (3%)	10 (28%)	9 (25%)	10 (28%)
Develop a registration scheme with light-touch checks	8 (12%)	7 (10%)	12 (18%)	37 (54%)	4 (6%)
Develop a self-certification registration scheme	13 (54%)	7 (29%)	2 (8%)	2 (8%)	(0%)
Do nothing	14 (56%)	7 (28%)	4 (16%)	(0%)	(0%)
Provide more information to the sector	12 (46%)	10 (38%)	3 (12%)	1 (4%)	(0%)
Regulatory alternative to a registration system	4 (50%)	(0%)	(0%)	3 (38%)	1 (13%)

Cross-tabulation: Question 9 and Question 3(d)

Question 3(d): How do you assess levels of compliance with regulations on food and drink within the short-term and holiday letting market in England?

Table 38. Respondent type: Host operating in the short-term and holiday letting market.

Scheme preference (Q9)	Compliance is very good	Compliance is good	Compliance is fair	Compliance is poor	Compliance is very poor
Develop a licensing scheme with physical checks of the premises	12 (32%)	7 (19%)	11 (30%)	5 (14%)	2 (5%)
Develop a registration scheme with light-touch checks	49 (33%)	43 (29%)	28 (19%)	26 (18%)	1 (1%)
Develop a self-certification registration scheme	69 (41%)	61 (36%)	30 (18%)	7 (4%)	2 (1%)
Do nothing	140 (64%)	56 (26%)	20 (9%)	2 (1%)	(0%)
Provide more information to the sector	92 (51%)	63 (35%)	22 (12%)	4 (2%)	1 (1%)
Regulatory alternative to a registration system	5 (33%)	5 (33%)	2 (13%)	2 (13%)	1 (7%)

Table 39. Respondent type: Member of the public

Scheme preference (Q9)	Compliance is very good	Compliance is good	Compliance is fair	Compliance is poor	Compliance is very poor
Develop a licensing scheme with physical checks of the premises	2 (5%)	3 (7%)	10 (23%)	8 (18%)	21 (48%)
Develop a registration scheme with light-touch checks	(0%)	5 (71%)	2 (29%)	(0%)	(0%)
Develop a self-certification registration scheme	8 (62%)	2 (15%)	3 (23%)	(0%)	(0%)
Do nothing	50 (72%)	17 (25%)	1 (1%)	(0%)	1 (1%)
Provide more information to the sector	16 (37%)	17 (40%)	8 (19%)	1 (2%)	1 (2%)
Regulatory alternative to a registration system	2 (14%)	4 (29%)	2 (14%)	1 (7%)	5 (36%)

Table 40. Respondent type: Owner/employee of a tourism accommodation business

Scheme preference (Q9)	Compliance is very good	Compliance is good	Compliance is fair	Compliance is poor	Compliance is very poor
Develop a licensing scheme with physical checks of the premises	7 (28%)	3 (12%)	6 (24%)	4 (16%)	5 (20%)
Develop a registration scheme with light-touch checks	10 (16%)	3 (5%)	14 (23%)	33 (53%)	2 (3%)
Develop a self-certification registration scheme	8 (36%)	7 (32%)	5 (23%)	2 (9%)	(0%)
Do nothing	21 (68%)	8 (26%)	2 (6%)	(0%)	(0%)
Provide more information to the sector	14 (54%)	10 (38%)	1 (4%)	1 (4%)	(0%)
Regulatory alternative to a registration system	2 (33%)	3 (50%)	1 (17%)	(0%)	(0%)

Table 41. Respondent type: Other (individual)

Scheme preference (Q9)	Compliance is very good	Compliance is good	Compliance is fair	Compliance is poor	Compliance is very poor
Develop a licensing scheme with physical checks of the premises	1 (13%)	(0%)	2 (25%)	2 (25%)	3 (38%)
Develop a registration scheme with light-touch checks	4 (44%)	1 (11%)	1 (11%)	2 (22%)	1 (11%)
Develop a self-certification registration scheme	2 (67%)	1 (33%)	(0%)	(0%)	(0%)
Do nothing	3 (50%)	3 (50%)	(0%)	(0%)	(0%)
Provide more information to the sector	3 (50%)	1 (17%)	2 (33%)	(0%)	(0%)
Regulatory alternative to a registration system	2 (67%)	(0%)	1 (33%)	(0%)	(0%)

Table 42. Respondent type: All individuals

Scheme preference (Q9)	Compliance is very good	Compliance is good	Compliance is fair	Compliance is poor	Compliance is very poor
Develop a licensing scheme with physical checks of the premises	22 (19%)	13 (11%)	29 (25%)	19 (17%)	31 (27%)
Develop a registration scheme with light-touch checks	63 (28%)	52 (23%)	45 (20%)	61 (27%)	4 (2%)
Develop a self-certification registration scheme	87 (42%)	71 (34%)	38 (18%)	9 (4%)	2 (1%)
Do nothing	214 (66%)	84 (26%)	23 (7%)	2 (1%)	1 (0%)
Provide more information to the sector	125 (49%)	91 (35%)	33 (13%)	6 (2%)	2 (1%)
Regulatory alternative to a registration system	22 (19%)	13 (11%)	29 (25%)	19 (17%)	31 (27%)

Table 43. Respondent type: Guest accommodation operators

Scheme preference (Q9)	Compliance is very good	Compliance is good	Compliance is fair	Compliance is poor	Compliance is very poor
Develop a licensing scheme with physical checks of the premises	(0%)	1 (20%)	3 (60%)	(0%)	1 (20%)
Develop a registration scheme with light-touch checks	4 (17%)	6 (25%)	2 (8%)	11 (46%)	1 (4%)
Develop a self-certification registration scheme	2 (50%)	1 (25%)	1 (25%)	(0%)	(0%)
Do nothing	5 (50%)	3 (30%)	2 (20%)	(0%)	(0%)
Provide more information to the sector	2 (50%)	2 (50%)	(0%)	(0%)	(0%)
Regulatory alternative to a registration system	1 (33%)	1 (33%)	(0%)	(0%)	1 (33%)

Table 44. Respondent type: Short-term and holiday let service companies

Scheme preference (Q9)	Compliance is very good	Compliance is good	Compliance is fair	Compliance is poor	Compliance is very poor
Develop a licensing scheme with physical checks of the premises	3 (30%)	1 (10%)	3 (30%)	1 (10%)	2 (20%)
Develop a registration scheme with light-touch checks	1 (9%)	2 (18%)	3 (27%)	5 (45%)	(0%)
Develop a self-certification registration scheme	4 (80%)	(0%)	1 (20%)	(0%)	(0%)
Do nothing	5 (100%)	(0%)	(0%)	(0%)	(0%)
Provide more information to the sector	3 (50%)	3 (50%)	(0%)	(0%)	(0%)
Regulatory alternative to a registration system	1 (100%)	(0%)	(0%)	(0%)	(0%)

Table 45. Respondent type: Other organisations

Scheme preference (Q9)	Compliance is very good	Compliance is good	Compliance is fair	Compliance is poor	Compliance is very poor
Develop a licensing scheme with physical checks of the premises	(0%)	(0%)	2 (18%)	4 (36%)	5 (45%)
Develop a registration scheme with light-touch checks	1 (10%)	2 (20%)	2 (20%)	3 (30%)	2 (20%)
Develop a self-certification registration scheme	2 (67%)	1 (33%)	(0%)	(0%)	(0%)
Do nothing	(0%)	(0%)	1 (100%)	(0%)	(0%)
Provide more information to the sector	2 (100%)	(0%)	(0%)	(0%)	(0%)

Table 46. Respondent type: All organisations

Scheme preference (Q9)	Compliance is very good	Compliance is good	Compliance is fair	Compliance is poor	Compliance is very poor
Develop a licensing scheme with physical checks of the premises	3 (12%)	2 (8%)	8 (31%)	5 (19%)	8 (31%)
Develop a registration scheme with light-touch checks	6 (13%)	10 (22%)	7 (16%)	19 (42%)	3 (7%)
Develop a self-certification registration scheme	8 (67%)	2 (17%)	2 (17%)	(0%)	(0%)
Do nothing	10 (63%)	3 (19%)	3 (19%)	(0%)	(0%)
Provide more information to the sector	7 (58%)	5 (42%)	(0%)	(0%)	(0%)
Regulatory alternative to a registration system	2 (50%)	1 (25%)	(0%)	(0%)	1 (25%)

Cross-tabulation: Question 9 and Question 4

Question 4: Do you consider there to be a problem with breach of contractual agreements in the short-term and holiday letting market in England?

Table 47. Respondent type: Host operating in the short-term and holiday letting market.

Scheme preference (Q9)	Yes, this is a major problem	Yes, but this is only a minor problem	No, there is no problem
Develop a licensing scheme with physical checks of the premises	9 (28%)	14 (44%)	9 (28%)
Develop a registration scheme with light-touch checks	27 (13%)	83 (40%)	99 (47%)
Develop a self-certification registration scheme	9 (4%)	52 (24%)	154 (72%)
Do nothing	9 (3%)	33 (11%)	262 (86%)
Provide more information to the sector	9 (4%)	65 (27%)	168 (69%)
Regulatory alternative to a registration system	4 (17%)	10 (43%)	9 (39%)

Table 48. Respondent type: Member of the public

Scheme preference (Q9)	Yes, this is a major problem	Yes, but this is only a minor problem	No, there is no problem
Develop a licensing scheme with physical checks of the premises	53 (77%)	10 (14%)	6 (9%)
Develop a registration scheme with light-touch checks	5 (23%)	8 (36%)	9 (41%)
Develop a self-certification registration scheme	1 (5%)	4 (21%)	14 (74%)
Do nothing	1 (1%)	7 (9%)	72 (90%)
Provide more information to the sector	2 (5%)	13 (31%)	27 (64%)
Regulatory alternative to a registration system	17 (68%)	4 (16%)	4 (16%)

Table 49. Respondent type: Owner/employee of a tourism accommodation business

Scheme preference (Q9)	Yes, this is a major problem	Yes, but this is only a minor problem	No, there is no problem
Develop a licensing scheme with physical checks of the premises	17 (59%)	3 (10%)	9 (31%)
Develop a registration scheme with light-touch checks	9 (13%)	45 (66%)	14 (21%)
Develop a self-certification registration scheme	5 (22%)	12 (52%)	6 (26%)
Do nothing	3 (7%)	3 (7%)	39 (87%)
Provide more information to the sector	3 (10%)	8 (28%)	18 (62%)
Regulatory alternative to a registration system	3 (30%)	2 (20%)	5 (50%)

Table 50. Respondent type: Other (individual)

Scheme preference (Q9)	Yes, this is a major problem	Yes, but this is only a minor problem	No, there is no problem
Develop a licensing scheme with physical checks of the premises	8 (73%)	2 (18%)	1 (9%)
Develop a registration scheme with light-touch checks	(0%)	1 (13%)	7 (88%)
Develop a self-certification registration scheme	1 (33%)	1 (33%)	1 (33%)
Do nothing	1 (11%)	2 (22%)	6 (67%)
Provide more information to the sector	(0%)	1 (17%)	5 (83%)
Regulatory alternative to a registration system	3 (75%)	1 (25%)	(0%)

Table 51. Respondent type: All individuals

Scheme preference (Q9)	Yes, this is a major problem	Yes, but this is only a minor problem	No, there is no problem
Develop a licensing scheme with physical checks of the premises	87 (62%)	29 (21%)	25 (18%)
Develop a registration scheme with light-touch checks	41 (13%)	137 (45%)	129 (42%)
Develop a self-certification registration scheme	16 (6%)	69 (27%)	175 (67%)
Do nothing	14 (3%)	45 (10%)	379 (87%)
Provide more information to the sector	14 (4%)	87 (27%)	218 (68%)
Regulatory alternative to a registration system	27 (44%)	17 (27%)	18 (29%)

Table 52. Respondent type: Guest accommodation operators

Scheme preference (Q9)	Yes, this is a major problem	Yes, but this is only a minor problem	No, there is no problem
Develop a licensing scheme with physical checks of the premises	3 (38%)	4 (50%)	1 (13%)
Develop a registration scheme with light-touch checks	5 (23%)	16 (73%)	1 (5%)
Develop a self-certification registration scheme	2 (33%)	3 (50%)	1 (17%)
Do nothing	(0%)	1 (10%)	9 (90%)
Provide more information to the sector	(0%)	1 (17%)	5 (83%)
Regulatory alternative to a registration system	1 (50%)	(0%)	1 (50%)

Table 53. Respondent type: Short-term and holiday let service companies

Scheme preference (Q9)	Yes, this is a major problem	Yes, but this is only a minor problem	No, there is no problem
Develop a licensing scheme with physical checks of the premises	5 (45%)	3 (27%)	3 (27%)
Develop a registration scheme with light-touch checks	1 (5%)	16 (84%)	2 (11%)
Develop a self-certification registration scheme	(0%)	3 (38%)	5 (63%)
Do nothing	1 (13%)	1 (13%)	6 (75%)
Provide more information to the sector	3 (25%)	3 (25%)	6 (50%)
Regulatory alternative to a registration system	(0%)	1 (100%)	(0%)

Table 54. Respondent type: Other organisations

Scheme preference (Q9)	Yes, this is a major problem	Yes, but this is only a minor problem	No, there is no problem
Develop a licensing scheme with physical checks of the premises	8 (73%)	3 (27%)	(0%)
Develop a registration scheme with light-touch checks	6 (50%)	6 (50%)	(0%)
Develop a self-certification registration scheme	(0%)	2 (50%)	2 (50%)
Do nothing	(0%)	(0%)	2 (100%)
Provide more information to the sector	(0%)	(0%)	1 (100%)
Regulatory alternative to a registration system	1 (100%)	(0%)	(0%)

Table 55. Respondent type: All organisations

Scheme preference (Q9)	Yes, this is a major problem	Yes, but this is only a minor problem	No, there is no problem
Develop a licensing scheme with physical checks of the premises	16 (53%)	10 (33%)	4 (13%)
Develop a registration scheme with light-touch checks	12 (23%)	38 (72%)	3 (6%)
Develop a self-certification registration scheme	2 (11%)	8 (44%)	8 (44%)
Do nothing	1 (5%)	2 (10%)	17 (85%)
Provide more information to the sector	3 (16%)	4 (21%)	12 (63%)
Regulatory alternative to a registration system	2 (50%)	1 (25%)	1 (25%)

Cross-tabulation: Question 9 and Question 6

Question 6: Do you consider the increase in short-term and holiday letting in England to have had adverse consequences on the housing market?

Table 56. Respondent type: Host operating in the short-term and holiday letting market.

Scheme preference (Q9)	Yes, this is a major problem	Yes, but this is only a minor problem	No, there is no problem
Develop a licensing scheme with physical checks of the premises	62 (64%)	25 (26%)	10 (10%)
Develop a registration scheme with light-touch checks	142 (36%)	180 (46%)	68 (17%)
Develop a self-certification registration scheme	71 (18%)	186 (48%)	132 (34%)
Do nothing	29 (7%)	113 (28%)	255 (64%)
Provide more information to the sector	48 (13%)	126 (35%)	189 (52%)
Regulatory alternative to a registration system	22 (54%)	11 (27%)	8 (20%)

Table 57. Respondent type: Member of the public

Scheme preference (Q9)	Yes, this is a major problem	Yes, but this is only a minor problem	No, there is no problem
Develop a licensing scheme with physical checks of the premises	159 (94%)	6 (4%)	5 (3%)
Develop a registration scheme with light-touch checks	19 (54%)	8 (23%)	8 (23%)
Develop a self-certification registration scheme	(0%)	9 (32%)	19 (68%)
Do nothing	5 (5%)	17 (17%)	78 (78%)
Provide more information to the sector	10 (18%)	14 (25%)	33 (58%)
Regulatory alternative to a registration system	60 (95%)	3 (5%)	(0%)

Table 58. Respondent type: Owner/employee of a tourism accommodation business

Scheme preference (Q9)	Yes, this is a major problem	Yes, but this is only a minor problem	No, there is no problem
Develop a licensing scheme with physical checks of the premises	38 (72%)	11 (21%)	4 (8%)
Develop a registration scheme with light-touch checks	67 (55%)	40 (33%)	15 (12%)
Develop a self-certification registration scheme	10 (22%)	29 (63%)	7 (15%)
Do nothing	6 (12%)	14 (27%)	32 (62%)
Provide more information to the sector	9 (19%)	17 (36%)	21 (45%)
Regulatory alternative to a registration system	13 (76%)	3 (18%)	1 (6%)

Table 59. Respondent type: Other (individual)

Scheme preference (Q9)	Yes, this is a major problem	Yes, but this is only a minor problem	No, there is no problem
Develop a licensing scheme with physical checks of the premises	22 (100%)	(0%)	(0%)
Develop a registration scheme with light-touch checks	15 (68%)	5 (23%)	2 (9%)
Develop a self-certification registration scheme	5 (63%)	2 (25%)	1 (13%)
Do nothing	(0%)	2 (17%)	10 (83%)
Provide more information to the sector	3 (21%)	6 (43%)	5 (36%)
Regulatory alternative to a registration system	14 (88%)	(0%)	2 (13%)

Table 60. Respondent type: All individuals

Scheme preference (Q9)	Yes, this is a major problem	Yes, but this is only a minor problem	No, there is no problem
Develop a licensing scheme with physical checks of the premises	281 (82%)	42 (12%)	19 (6%)
Develop a registration scheme with light-touch checks	243 (43%)	233 (41%)	93 (16%)
Develop a self-certification registration scheme	86 (18%)	226 (48%)	159 (34%)
Do nothing	40 (7%)	146 (26%)	375 (67%)
Provide more information to the sector	70 (15%)	163 (34%)	248 (52%)
Regulatory alternative to a registration system	109 (80%)	17 (12%)	11 (8%)

Table 61. Respondent type: Guest accommodation operators

Scheme preference (Q9)	Yes, this is a major problem	Yes, but this is only a minor problem	No, there is no problem
Develop a licensing scheme with physical checks of the premises	13 (81%)	2 (13%)	1 (6%)
Develop a registration scheme with light-touch checks	24 (67%)	8 (22%)	4 (11%)
Develop a self-certification registration scheme	(0%)	2 (25%)	6 (75%)
Do nothing	2 (18%)	3 (27%)	6 (55%)
Provide more information to the sector	(0%)	4 (36%)	7 (64%)
Regulatory alternative to a registration system	3 (75%)	(0%)	1 (25%)

Table 62. Respondent type: Short-term and holiday let service companies

Scheme preference (Q9)	Yes, this is a major problem	Yes, but this is only a minor problem	No, there is no problem
Develop a licensing scheme with physical checks of the premises	2 (17%)	7 (58%)	3 (25%)
Develop a registration scheme with light-touch checks	9 (38%)	11 (46%)	4 (17%)
Develop a self-certification registration scheme	2 (20%)	5 (50%)	3 (30%)
Do nothing	1 (11%)	1 (11%)	7 (78%)
Provide more information to the sector	(0%)	4 (27%)	11 (73%)
Regulatory alternative to a registration system	1 (25%)	1 (25%)	2 (50%)

Table 63. Respondent type: Other organisations

Scheme preference (Q9)	Yes, this is a major problem	Yes, but this is only a minor problem	No, there is no problem
Develop a licensing scheme with physical checks of the premises	40 (89%)	3 (7%)	2 (4%)
Develop a registration scheme with light-touch checks	18 (82%)	3 (14%)	1 (5%)
Develop a self-certification registration scheme	2 (29%)	4 (57%)	1 (14%)
Do nothing	1 (50%)	1 (50%)	(0%)
Provide more information to the sector	(0%)	(0%)	1 (100%)
Regulatory alternative to a registration system	5 (100%)	(0%)	(0%)

Table 64. Respondent type: All organisations

Scheme preference (Q9)	Yes, this is a major problem	Yes, but this is only a minor problem	No, there is no problem
Develop a licensing scheme with physical checks of the premises	55 (75%)	12 (16%)	6 (8%)
Develop a registration scheme with light-touch checks	51 (62%)	22 (27%)	9 (11%)
Develop a self-certification registration scheme	4 (16%)	11 (44%)	10 (40%)
Do nothing	4 (18%)	5 (23%)	13 (59%)
Provide more information to the sector	(0%)	8 (30%)	19 (70%)
Regulatory alternative to a registration system	9 (69%)	1 (8%)	3 (23%)

Cross-tabulation: Question 9 and Question 7

Question 7: Do you consider noise, anti-social or other nuisance behaviour in short-term and holiday lets in England to be a problem?

Table 65. Respondent type: Host operating in the short-term and holiday letting market.

Scheme preference (Q9)	Yes, this is a major problem	Yes, but this is only a minor problem	No, there is no problem
Develop a licensing scheme with physical checks of the premises	21 (27%)	37 (47%)	20 (26%)
Develop a registration scheme with light-touch checks	12 (3%)	158 (46%)	173 (50%)
Develop a self-certification registration scheme	8 (2%)	110 (30%)	246 (68%)
Do nothing	3 (1%)	67 (17%)	335 (83%)
Provide more information to the sector	4 (1%)	89 (24%)	271 (74%)
Regulatory alternative to a registration system	4 (13%)	8 (26%)	19 (61%)

Table 66. Respondent type: Member of the public

Scheme preference (Q9)	Yes, this is a major problem	Yes, but this is only a minor problem	No, there is no problem
Develop a licensing scheme with physical checks of the premises	119 (82%)	18 (12%)	8 (6%)
Develop a registration scheme with light-touch checks	8 (24%)	12 (36%)	13 (39%)
Develop a self-certification registration scheme	(0%)	8 (25%)	24 (75%)
Do nothing	(0%)	16 (16%)	86 (84%)
Provide more information to the sector	1 (2%)	17 (31%)	37 (67%)
Regulatory alternative to a registration system	38 (66%)	13 (22%)	7 (12%)

Table 67. Respondent type: Owner/employee of a tourism accommodation business

Scheme preference (Q9)	Yes, this is a major problem	Yes, but this is only a minor problem	No, there is no problem
Develop a licensing scheme with physical checks of the premises	10 (27%)	15 (41%)	12 (32%)
Develop a registration scheme with light-touch checks	7 (6%)	60 (55%)	43 (39%)
Develop a self-certification registration scheme	1 (3%)	16 (40%)	23 (58%)
Do nothing	1 (2%)	9 (17%)	42 (81%)
Provide more information to the sector	(0%)	15 (35%)	28 (65%)
Regulatory alternative to a registration system	3 (21%)	6 (43%)	5 (36%)

Table 68. Respondent type: Other (individual)

Scheme preference (Q9)	Yes, this is a major problem	Yes, but this is only a minor problem	No, there is no problem
Develop a licensing scheme with physical checks of the premises	15 (71%)	6 (29%)	(0%)
Develop a registration scheme with light-touch checks	1 (7%)	8 (53%)	6 (40%)
Develop a self-certification registration scheme	(0%)	5 (50%)	5 (50%)
Do nothing	(0%)	2 (18%)	9 (82%)
Provide more information to the sector	1 (8%)	3 (25%)	8 (67%)
Regulatory alternative to a registration system	10 (63%)	6 (38%)	(0%)

Table 69. Respondent type: All individuals

Scheme preference (Q9)	Yes, this is a major problem	Yes, but this is only a minor problem	No, there is no problem
Develop a licensing scheme with physical checks of the premises	165 (59%)	76 (27%)	40 (14%)
Develop a registration scheme with light-touch checks	28 (6%)	238 (48%)	235 (47%)
Develop a self-certification registration scheme	9 (2%)	139 (31%)	298 (67%)
Do nothing	4 (1%)	94 (16%)	472 (83%)
Provide more information to the sector	6 (1%)	124 (26%)	344 (73%)
Regulatory alternative to a registration system	55 (46%)	33 (28%)	31 (26%)

Table 70. Respondent type: Guest accommodation operators

Scheme preference (Q9)	Yes, this is a major problem	Yes, but this is only a minor problem	No, there is no problem
Develop a licensing scheme with physical checks of the premises	5 (31%)	8 (50%)	3 (19%)
Develop a registration scheme with light-touch checks	2 (6%)	19 (59%)	11 (34%)
Develop a self-certification registration scheme	(0%)	4 (50%)	4 (50%)
Do nothing	(0%)	3 (27%)	8 (73%)
Provide more information to the sector	(0%)	5 (45%)	6 (55%)
Regulatory alternative to a registration system	1 (50%)	1 (50%)	(0%)

Table 71. Respondent type: Short-term and holiday let service companies

Scheme preference (Q9)	Yes, this is a major problem	Yes, but this is only a minor problem	No, there is no problem
Develop a licensing scheme with physical checks of the premises	2 (17%)	6 (50%)	4 (33%)
Develop a registration scheme with light-touch checks	(0%)	14 (58%)	10 (42%)
Develop a self-certification registration scheme	(0%)	6 (55%)	5 (45%)
Do nothing	(0%)	1 (11%)	8 (89%)
Provide more information to the sector	1 (8%)	5 (38%)	7 (54%)
Regulatory alternative to a registration system	1 (25%)	2 (50%)	1 (25%)

Table 72. Respondent type: Other organisations

Scheme preference (Q9)	Yes, this is a major problem	Yes, but this is only a minor problem	No, there is no problem
Develop a licensing scheme with physical checks of the premises	25 (63%)	13 (33%)	2 (5%)
Develop a registration scheme with light-touch checks	7 (35%)	12 (60%)	1 (5%)
Develop a self-certification registration scheme	(0%)	2 (50%)	2 (50%)
Do nothing	(0%)	2 (67%)	1 (33%)
Provide more information to the sector	1 (50%)	(0%)	1 (50%)
Regulatory alternative to a registration system	3 (75%)	1 (25%)	(0%)

Table 73. Respondent type: All organisations

Scheme preference (Q9)	Yes, this is a major problem	Yes, but this is only a minor problem	No, there is no problem
Develop a licensing scheme with physical checks of the premises	32 (47%)	27 (40%)	9 (13%)
Develop a registration scheme with light-touch checks	9 (12%)	45 (59%)	22 (29%)
Develop a self-certification registration scheme	(0%)	12 (52%)	11 (48%)
Do nothing	(0%)	6 (26%)	17 (74%)
Provide more information to the sector	2 (8%)	10 (38%)	14 (54%)
Regulatory alternative to a registration system	5 (50%)	4 (40%)	1 (10%)

Cross-tabulation: Question 9 and Question 8

Question 8: Aside from the impacts on housing and incidents of antisocial/ nuisance behaviour, do you consider the increase in short-term and holiday letting in England to have had other adverse impacts on local communities and residents?

Table 74. Respondent type: Host operating in the short-term and holiday letting market.

Scheme preference (Q9)	Yes	No
Develop a licensing scheme with physical checks of the premises	49 (61%)	31 (39%)
Develop a registration scheme with light-touch checks	122 (33%)	244 (67%)
Develop a self-certification registration scheme	60 (15%)	329 (85%)
Do nothing	23 (5%)	406 (95%)
Provide more information to the sector	35 (10%)	331 (90%)
Regulatory alternative to a registration system	14 (40%)	21 (60%)

Table 75. Respondent type: Member of the public

Scheme preference (Q9)	Yes	No
Develop a licensing scheme with physical checks of the premises	149 (96%)	6 (4%)
Develop a registration scheme with light-touch checks	21 (62%)	13 (38%)
Develop a self-certification registration scheme	2 (6%)	31 (94%)
Do nothing	5 (5%)	98 (95%)
Provide more information to the sector	6 (12%)	45 (88%)
Regulatory alternative to a registration system	59 (94%)	4 (6%)

Table 76. Respondent type: Owner/employee of a tourism accommodation business

Scheme preference (Q9)	Yes	No
Develop a licensing scheme with physical checks of the premises	38 (79%)	10 (21%)
Develop a registration scheme with light-touch checks	63 (55%)	51 (45%)
Develop a self-certification registration scheme	10 (24%)	31 (76%)
Do nothing	4 (7%)	50 (93%)
Provide more information to the sector	9 (20%)	37 (80%)
Regulatory alternative to a registration system	13 (72%)	5 (28%)

Table 77. Respondent type: Other (individual)

Scheme preference (Q9)	Yes	No
Develop a licensing scheme with physical checks of the premises	18 (95%)	1 (5%)
Develop a registration scheme with light-touch checks	16 (64%)	9 (36%)
Develop a self-certification registration scheme	4 (44%)	5 (56%)
Do nothing	1 (9%)	10 (91%)
Provide more information to the sector	2 (14%)	12 (86%)
Regulatory alternative to a registration system	13 (87%)	2 (13%)

Table 78. Respondent type: All individuals

Scheme preference (Q9)	Yes	No
Develop a licensing scheme with physical checks of the premises	254 (84%)	48 (16%)
Develop a registration scheme with light-touch checks	222 (41%)	317 (59%)
Develop a self-certification registration scheme	76 (16%)	396 (84%)
Do nothing	33 (6%)	564 (94%)
Provide more information to the sector	52 (11%)	425 (89%)
Regulatory alternative to a registration system	99 (76%)	32 (24%)

Table 79. Respondent type: Guest accommodation operators

Scheme preference (Q9)	Yes	No
Develop a licensing scheme with physical checks of the premises	13 (81%)	3 (19%)
Develop a registration scheme with light-touch checks	18 (62%)	11 (38%)
Develop a self-certification registration scheme	1 (14%)	6 (86%)
Do nothing	(0%)	9 (100%)
Provide more information to the sector	1 (11%)	8 (89%)
Regulatory alternative to a registration system	3 (75%)	1 (25%)

Table 80. Respondent type: Short-term and holiday let service companies

Scheme preference (Q9)	Yes	No
Develop a licensing scheme with physical checks of the premises	6 (50%)	6 (50%)
Develop a registration scheme with light-touch checks	14 (61%)	9 (39%)
Develop a self-certification registration scheme	2 (18%)	9 (82%)
Do nothing	(0%)	8 (100%)
Provide more information to the sector	1 (7%)	13 (93%)
Regulatory alternative to a registration system	1 (25%)	3 (75%)

Table 81. Respondent type: Other organisations

Scheme preference (Q9)	Yes	No
Develop a licensing scheme with physical checks of the premises	40 (93%)	3 (7%)
Develop a registration scheme with light-touch checks	17 (81%)	4 (19%)
Develop a self-certification registration scheme	1 (20%)	4 (80%)
Do nothing	2 (100%)	(0%)
Provide more information to the sector	1 (50%)	1 (50%)
Regulatory alternative to a registration system	5 (100%)	(0%)

Table 82. Respondent type: All organisations

Scheme preference (Q9)	Yes	No
Develop a licensing scheme with physical checks of the premises	59 (83%)	12 (17%)
Develop a registration scheme with light-touch checks	49 (67%)	24 (33%)
Develop a self-certification registration scheme	4 (17%)	19 (83%)
Do nothing	2 (11%)	17 (89%)
Provide more information to the sector	3 (12%)	22 (88%)
Regulatory alternative to a registration system	9 (69%)	4 (31%)

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