Hotels in Islington

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Hotels in Islington

Contents

Management Summary

This report has been prepared as part of an Employment Land Study (ELS) for London Borough of Islington during July to December 2015.

Overview

London is one of the main destinations for UK resident staying trips in Britain and is the main UK destination for visitors from overseas. Over time there has been a decline in the expenditure by UK staying visitors and an increase in expenditure by visitors from overseas.

Within the hotel sector nationally, there has been a declining number of establishments as smaller businesses are closing to be replaced by fewer, larger ones. Across the UK almost 40% of rooms are within branded hotels (as part of a corporate chain or consortia), and within London this proportion rises to 61%. It is forecast that by 2030 two-thirds of hotel rooms are likely to be branded. Branded budget hotels have made up 59% of the new hotels since 2003.

In London, occupancy rates are higher than the England averages and less volatile, and on average, London hotels are more profitable. Conferences and meetings are an important part of the hotel market. London is able to support more full service hotels than the UK average.

Strategic Priorities

Hotels are recognised as strategically important because of their role in supporting the operations of other businesses, facilitating London's role as a world class visitor destination as well as directly providing employment and other economic benefits. However, from a broader economic perspective, hotels play a *supporting* economic role while other business types in B-class accommodation is likely to play a *driving* economic role. Accordingly, it is clear that at a strategic level across London and in Islington, there will be benefits from managing the development of hotels in order that it does not jeopardise or displace higher value economic uses.

Hotels are considered a town centre use and therefore in Islington there is a presumption that new hotel development will be located in one of the four town centres. Where hotel development takes place in the CAZ in Islington, it is expected to be in one of the opportunity areas in proximity to major rail hubs (namely Farringdon, King's Cross, Moorgate and Old Street), but policy states hotel development will be directed to town centres in the first instance.

The GLA has identified a need for 40,000 net additional bedrooms across London between 2012 and 2036 of which Islington is expected to contribute 700 hotel bedrooms and 600 other bedrooms.

Visitor Accommodation in Islington

It is estimated that there are currently 49 visitor accommodation establishments in Islington, providing 4,495 rooms. The majority of these rooms (3,335) are in hotels.

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Type	Establishments	Total Rooms
Apart-hotel	11	361
B&B	4	21
Guesthouse	6	65
Hostel	6	713
Hotel	22	3,335
Grand Total	**49**	**4,495**

The deregulation of short term lets along with the emergence of B&B letting websites such as Airbnb and One Fine Stay has the potential to change the way that visitors use accommodation in London. There are over 2,100 listings in Islington, 8% of the London total. It is not yet clear whether this use of 'informal' accommodation will attract new visitors or displace visitors from 'traditional' accommodation.

Compared to 2006 there are about the same number of hotels in Islington but hotels are now providing more rooms (3,335 compared to 2,740 in 2006). There has been a substantial increase in aparthotels, albeit from a small base (from one in 2006 to 11 in 2025).

Development in the pipeline for Islington (consented or construction started) is likely to provide over 1,600 beds, which is 25% above the GLA-based target for Islington. However it is possible that not all of this development will proceed or some of the existing accommodation businesses will cease operating, and so this will need to be kept under review.

Based on the capital value data used as part of the Islington CIL evidence base, it seems likely that hotel uses will be able to outbid offices and some other uses for many sites in the Borough. The existing London and Islington planning policies will therefore be of use in directing any new hotel accommodation to the locations where it may provide benefits.

Hotels in Islington

1.0 Introduction

1.1 This report has been prepared as part of an Employment Land Study (ELS) for London Borough of Islington. The summary points from this work on the Hotel Sector in Islington have informed the main ELS report. The research for this report was undertaken by subject specialist Dominic Houston of Three Dragons. The work took place between July and December 2015.

2.0 National trends

Tourism by UK residents

2.1 In 2014, British residents took 92.6 million overnight trips in England, totalling 273 million nights away from home, with expenditure of £18.1bn.1 £195 was spent per trip, and with an average trip length of 2.95 nights, the average spend per night was £66. The number of domestic trips was 9% lower than in 2013, and the amount spent fell by 3% (in nominal terms). Within the overall total staying trips by the British in England, holidays account for 44%, visits to friends and relatives (VFR) 39% and business trips 15%.

2.2 In terms of spend, holidays account for 56%, VFR 22% and business trips 19% of the total. There were more, shorter holidays (1-3 nights) than long holidays, with 26.5 million short breaks of 1-3 nights, with £5.3bn spend; compared to 14.3 million 4+ night holidays, with £4.8bn spend.

2.3 Based on three year averages, London, Devon, North Yorkshire, Cornwall & the Isles of Scilly and Greater Manchester are the most popular destinations for British residents overnight trips (12%, 5%, 5%, 4%s and 4% respectively). The South West of England accounts for 19% of UK resident staying trips and 22% of the spend.

Tourism by overseas residents

2.4 There were 34.4m visits by overseas residents to the UK in 2014[2], with £21.8bn spend. Expenditure in the UK by visitors from overseas accounted for 49% of all staying visitor expenditure in 2014. Within the UK, London dominates as the favourite destination for overseas visitors and accounts for 54% of all visitors from overseas' expenditure in 2014.

Day visits from home

2.5 During 2014, GB residents took a total of 1,585 million Tourism Day Visits to destinations in England, Scotland or Wales.[3] Around £54bn was spent during these trips. There was little change compared to 2013. Within England, London was the most visited day visit destination, with 35.5 million trips and £2.2bn spend. Between 2011 and 2014 there has been little change in the volume of day trips from home and a slight increase in spend.

Trends

2.6 The longer term trends affecting tourism in the UK are as follows.

- Growing spend on UK day trips (£33.4bn in 2001 to £54bn in 2014).

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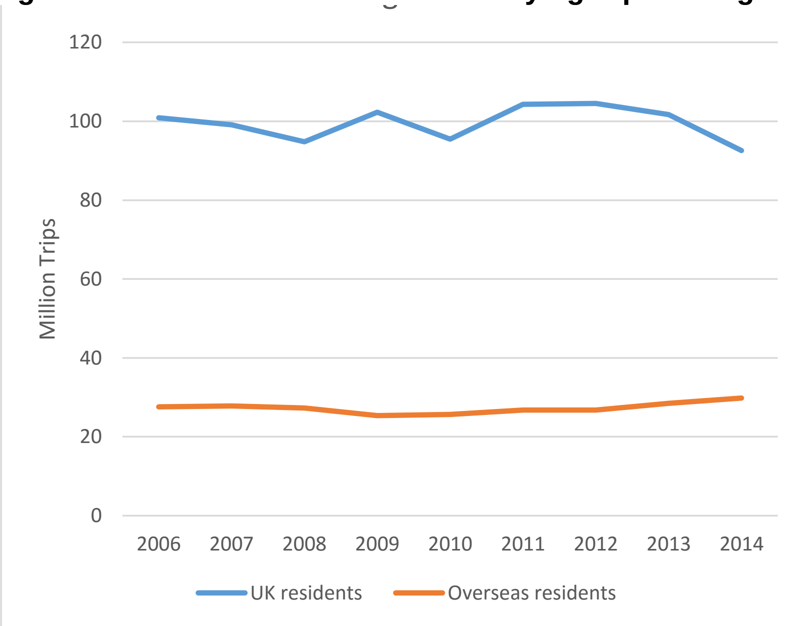
[1] VisitEngland, 2015, GBTS
[2] VisitBritain, 2015, IPS
[3] VisitEngland, 2015, GBDVS

- Falling spend by UK staying visitors (£26.1bn in 2001 to £22.6bn in 2014).
- Growing spend by overseas visitors (£11.3bn in 2001 to £21.8bn in 2014).

2.7 Within this, there has been a restructuring of UK holiday trip taking, with shorter additional trips replacing longer main holiday trips in the UK. In 1989 short breaks accounted for 23% of domestic holiday expenditure compared to 50% in 2014. Aggressive promotional efforts by major hotel groups continues to grow the short holiday market. Overseas destinations have taken an increased share of longer holiday trips, and with the advent of budget airlines have also received more short breaks.

2.8 There has been a reversal of the longer trend in 2011, with the emergence of a 'staycation' effect (UK residents taking more domestic holidays). However this may not be a lasting effect as recent data shows staying trips and expenditure falling back in 2012, 2013 and 2014 (Figure 1). The recent decline has been evident in longer trips (4+ nights) while short breaks have remained steady; and there is some evidence of increases in business trips, which tend to be strongly linked to economic performance.[4]

Figure 1 UK and overseas resident staying trips in England



Source GBTS and IPS[5]

Hotels

2.9 The lack of a comprehensive register of hotels and other serviced accommodation in the UK means the size of the sector is difficult to calculate. However estimates suggest[6] that the total number of hotels and guest houses in the UK was 45,480 in 2012. This figure has been declining because even

[4] VisitEngland, 2014, GB Tourist 2013
[5] As reported in VisitEngland , 2015, Tourism in England, Key Facts and Trends 2014
[6] Horizons, as reported in BHA, 2012, Trends and Developments

though there have been 100-150 new hotels opening in each of the past ten years, this has been less than the number of closures of small hotels and guesthouses, particularly in resort areas, as well as closure of some large properties.

2.10 In terms of rooms available, the number has been increasing. Estimates[7] suggest that there were 728,671 rooms in 2011, an increase from the 497,502 in 1979. Since 2007 it is estimated that 69,811 rooms have opened but 11,000 have closed in the same period.

2.11 The majority of closures are in small unbranded independent properties in coastal areas such as Cornwall, Blackpool, Torbay, Bournemouth and the Isle of Wight. While a significant number of rooms also closed in the London boroughs of Westminster, Kensington and Chelsea (typically branded and larger properties), new hotel openings outnumbered the closures.

2.12 The average size hotel has 16 rooms overall, while the average budget hotel has 80 rooms. It is estimated[8] that there are 118,556 serviced accommodation rooms in London, which is 16% of the UK total.

2.13 Figure 2 shows that across the UK almost 40% of rooms are within branded hotels (as part of a corporate chain or consortia), and within London this proportion rises to 61%. Commentators forecast that by 2030 two-thirds of hotel rooms are likely to be branded.[9]

2.14 Major brands bring marketing muscle to hotel owners, including global reservations systems, sales organisations, and customer databases. Often these are supported by loyalty schemes and consumer advertising. Because the costs of these systems are spread over a large number of rooms, they have a scale and reach beyond the independent hotelier.

2.15 Furthermore, finance for development is often available at more favourable rates for large businesses, where the risk is spread across the whole portfolio and there is a known trading performance. Figure 2 also shows that London has proportionately more full service hotel rooms (over twice as many as the national average), and slightly more mid-market hotel rooms. Proportionately, there are fewer independently owned hotel rooms.

[7] Melvin Gold Consulting, as reported in BHA, 2012, Trends and Developments
[8] Melvin Gold Consulting, as reported in BHA, 2012, Trends and Developments
[9] Melvin Gold Consulting, as reported in BHA, 2012, Trends and Developments

Figure 2 Hotel rooms by establishment type

Type	Greater London		United Kingdom	
	No.	%	No.	%
Full Service	39,451	33	101,987	14
Mid-market	15,056	13	71,899	10
Budget	18,243	15	115,196	16
Consortia	7,786	7	48,413	7
Independent	38,020	32	391,056	54
Total	118,556	100	728,551	100
Total Corporate Branded		61		40
Total Independent		32		54
Total Consortia		7		7

Notes: Melvin Gold Consulting, as reported in BHA, 2012, Trends and Developments. Note: Full service hotels are leading chain hotels, operating mainly in the four- and 5-star market. Mid-market hotels also offer full service but are mainly in the 3-star market and below and fall between the full service and budget category. Almost all budget hotels are branded. Independent hotels include private hotels, guest houses, bed and breakfast establishments and other independently owned operations. Full service, mid-market, budget and consortia properties are specifically identified properties; the independent category includes establishments which are specifically identified and those which are calculated.

2.16 Across the UK there have been 103,612 new hotel rooms since 2003 (Figures 3, 4 and 5), along with over 26,000 rebranded rooms and approximately 9,500 refurbished rooms.

Figure 3 Hotel rooms built, 2003-12

Year	Number of rooms			
	New Openings	Rebranding	Refurb	Total
2003	4,492	833	-	5,325
2004	12,545	147	65	12,757
2005	7,792	1,205	470	9,467
2006	8,346	3,771	830	12,947
2007	10,959	3,897	3,499	18,355
2008	13,491	3,528	1,872	18,891
2009	9,944	4,137	1,052	15,133
2010	8,990	1,887	725	11,602
2011	11,185	4,206	462	15,853
2012	15,868	2,729	478	19,075
Total	**103,612**	**26,340**	**9,453**	**139,405**

Melvin Gold Consulting, as reported in BHA, 2012

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2.17 The branded budget hotel[10] sector has grown 10% per annum in the past decade and exceeded 20% in the prior decade and now has over 130,000 rooms, some 17.8% of total service accommodation.[11]

Figure 4 Number of new build rooms, rebrands and refurbishments, 2003-12

Rooms	New Build	Rebranding	Refurb	Total	Construction
London	28,791	10,084	3,133	42,008	£4,542.2m
UK	103,612	26,340	9,453	139,405	£12,425.4m

Melvin Gold Consulting, as reported in BHA, 2012

2.18 Figure 5 also illustrates the growth in budget hotel rooms, which make up 59% of the new hotels since 2003 and 57% of the rooms. The growth in budget hotels is predominantly driven by the two largest companies, Premier Inn (19,311 rooms) and Travelodge (18,433); the next largest, Holiday Inn Express (IHG), opened 5,588 rooms.[12]

Figure 5 New openings, 2003-12

Type	Hotels	Rooms
Budget	580	58,612
Midmarket	297	16,880
Full service	67	14,609
Independent	139	5,868
Boutique	47	3,593
Aparthotel[13]	23	1,407
Upscale	9	1,356
Hostel	5	435
Resort lodges/apartents	3	383
Country house	7	297
Pub	5	151
Beach hut resort	1	21
Total	**983**	**103,612**

Source: Melvin Gold Consulting/Gleeds, as reported in BHA, 2012, Trends and Developments

[10] The BHA defines a budget hotel as a property without an extensive food and beverage operation, with limited en-suite and in-room facilities (limited availability of such items as hair dryers, toiletries, etc), low staffing and service levels and a price markedly below that of a full service, 3-star hotel. This perception is encouraged by numerous promotions selling rooms from £29 per night (BHA, 2012, Trends and Developments).

[11] Melvin Gold Consulting, 2013, reported in CoStar

[12] BHA database as reported in BHA, 2012, Trends and Developments

[13] Aparthotels typically provide short-stay self-catering accommodation within a serviced block.

2.19 Both Travelodge and Premier Inn have development strategies that feature a wider variety of locations than other brands in the UK. The tables also shows the emergence of niche sectors such as boutique hotels and Aparthotels.

Hotel operators

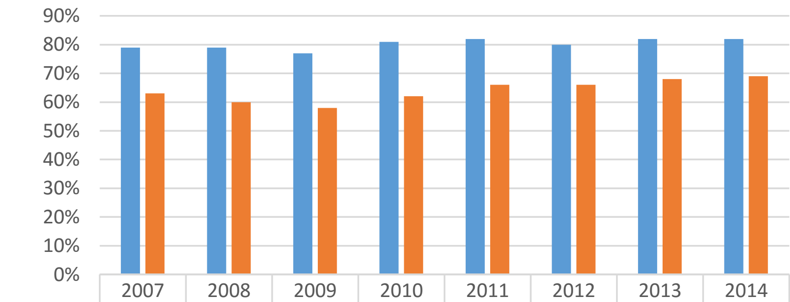
2.20 The UK's largest hotel operating group is Whitbread, which operates Premier Inns as well as a number of restaurant brands such as Beefeater Grill, Brewers Fayre, Table Table and Taybarns, as well as Costa. Travelodge underwent financial restructuring in 2012 but continues to expand, including through a series of joint ventures with local authorities[14], taking advantage of Councils' ability to borrow money cheaply (prudential borrowing) and land assets, as well as helping to deliver regeneration aspirations.

2.21 Intercontinental Hotels operates InterContinental, Crowne Plaza, Hotel Indigo, Holiday Inn, Holiday Inn Express and Staybridge Suites in the UK. In 2011-12 it increased the number of its hotels to 282 with 27 hotels in its UK development pipeline. Unlike Travelodge and Premier Inns, Intercontinental typically work through franchise agreements or management contracts, as well as re-brands. Best Western is one of the largest consortia, with 280 independently-owned hotels with over 15,900 rooms.

English hotel room performance

2.22 Room occupancy data for hotels in England is available from VisitEngland.[15] Room occupancy declined in 2008 and 2009, and has recovered since (Figure 6). In London, occupancy rates are higher than the England averages and less volatile. The fall in London occupancy rates was only apparent in 2008 and rates have increased since then. The differential between England and London room occupancy rates has reduced over time.

Figure 6 Room occupancy rates in England and London



	2007	2008	2009	2010	2011	2012	2013	2014
London	79%	79%	77%	81%	82%	80%	82%	82%
England	63%	60%	58%	62%	66%	66%	68%	69%

London England

Source: VisitEngland, 2009-2015, English Occupancy Survey

[14] E.g. Travelodge schemes with Cherwell District Council at Bicester, Breckland Council at Thetford and with Reigate & Banstead Borough Council at Redhill.
[15] VisitEngland, 2009-2015, English Occupancy Survey

2.23 In addition to the improvements in occupancy rates over time, other indicators for hotels in London also show improvement – average achieved rates were £117 in 2007 compared to £134 in 2011; and revenue per available room (REVPAR)[16] was £93 in 2007 and £110 in 2011.[17] During the same time, the English averages for these indicators fell.

Conferences and meetings

2.24 Conferences and meetings are part of the hotel market, but will also take place in a variety of other venues. The UK Conference and Meeting Survey 2015[18] estimates that conferences and meetings are valued at an estimated £21.6bn in venue and destination direct spend in 2014. The total represents an increase of some £2bn compared with the previous year, due mainly to an increase in event size.

- There was an average of 366 events per venue in 2014 – similar to 2013 (356 events) and 2012 (373 events).
- The majority of events (61%) were held in hotels.
- The average event duration was 1.6 days, although most events (64%) lasted a day or less. Average duration varied from 1.4 days for non-residential events to 2.0 days for residential events.
- The average daily delegate rate achieved by venues for business events was £46. The average residential rate was £126. This compares to an average for the period 2010 to 2014 of £43 for day rates and £129 for residential rates.
- The lack of growth in rates achieved suggests that the market is still highly competitive.
- Other challenges noted by venues were keeping pace with technology demands and the provision of Wi-Fi with sufficient bandwidth. However increasing optimism in the market was reflected in higher levels of investment by venues, with 78% having undertaken some investment in 2014. The proportion of venues investing more than £100,000 was up on 2012 and 2013 levels.

Summary

2.25 London is one of the main destinations for UK resident staying trips in Britain and is the main destination for visitors from overseas, by some margin. Over time there has been a decline in the spend by UK staying visitors and an in increase in spend by visitors from overseas. Within this, there has been a restructuring of UK holiday trip taking, with shorter additional trips replacing longer main holiday trips in the UK. For UK residents, overseas destinations have taken an increased share of longer holiday trips and shorter breaks. The staycation effect noted in 2011 has faded.

2.26 Within the hotel sector nationally, there has been a declining number of establishments as smaller businesses are closing to be replaced by fewer, larger ones. Across the UK almost 40% of rooms are within branded hotels (as part of a corporate chain or consortia), and within London this proportion

[16] A performance metric in the hotel industry that is calculated by dividing a hotel's total guestroom revenue by the room count and the number of days in the period being measured.
[17] STR Global, 2012, reported in BHA, 2012, Trends and Developments
[18] Event and Visual Communication Association, 2015, UK Conference and Meeting Survey

rises to 61%. It is forecast that by 2030 two-thirds of hotel rooms are likely to be branded. Branded budget hotels have made up 59% of the new hotels since 2003.

2.27 In London, occupancy rates are higher than the England averages and less volatile, and on average, London hotels are more profitable. Conferences and meetings are an important part of the hotel market. London is able to support more full service hotels than the UK average.

3.0 Tourism and hotel priorities in London and Islington

3.1 Hotels and other types of visitor accommodation are part of the economy in their own right as business and employers, as well as enabling other parts of the economy to fulfil their potential. In particular:

- Visitors staying in hotels and other accommodation spend money in catering, transport, retail and entertainment/attractions
- Businesses in other sectors require accommodation for their clients, suppliers and business partners, as well as providing conference and meeting spaces.

3.2 This section reviews the tourism and hotel development priorities relevant to Islington.

The London Plan

3.3 Islington is part of the Inner London sub-region and includes part of the Central Activities Zone (CAZ). The southern part of the Borough includes small parts of the City Fringe and King's Cross *Opportunity Areas*[19], the Farringdon/Smithfield Intensification Area [20] and some areas of arts, cultural or entertainment character.

3.4 In relation to tourism and hotels, the London Plan[21] notes that the CAZ includes many of the sights, attractions, heritage assets and facilities at the centre of London's visitor offer complemented by the presence of specialist retail and leisure uses there.

3.5 The visitor economy is important to London as a whole, and there will be a need to ensure that the CAZ retains its status as a world-class visitor destination, while also meeting the needs of those who live and work there. The Plan states that business travel is a key element of the visitor economy in the CAZ, and London's competitiveness could be significantly enhanced by a convention centre of international standard. The Plan states that the quality of London's visitor accommodation is central to the aim of providing a world-class tourism experience. However, it is a clear intention of the Plan that

[19] Opportunity areas are the capital's major reservoir of brownfield land with significant capacity to accommodate new housing, commercial and other development. Note that only small areas of Islington are covered by City Fringe and King's Cross OA designation, and their development capacity is limited.

[20] Intensification areas are typically built-up areas with good existing or potential public transport accessibility which can support redevelopment at higher densities.

[21] Mayor of London, 2015, London Plan (FALP)

development should not compromise the CAZ's strategic employment function.

3.6 Policy 2.10 Central Activities Zone – Strategic Priorities includes two key aims:

- The need to bring forward development capacity and supporting infrastructure and services to sustain and enhance the CAZ's varied strategic functions without compromising the attractions of residential neighbourhoods where more local uses predominate.
- Sustaining and managing the attractions of the CAZ as the world's leading visitor destination.

3.7 Policy 2.15 Town Centres states that town centres will be the main foci for development outside the CAZ.

3.8 Policy 4.5 London's Visitor Infrastructure states the need to support London's visitor economy and stimulate its growth, taking into account the needs of business as well as leisure visitors, including 40,000 net additional hotel bedrooms by 2036, of which at least 10% should be wheelchair accessible. The Policy states the following.

- Beyond the CAZ new visitor accommodation should be focussed in town centres and opportunity and intensification areas, where there is good public transport access to central London and international and national transport termini. Major town centres in Islington are Angel and Nags Head; and Archway and Finsbury Park are designated as a district town centres (noting that Finsbury Park extends into Hackney and Haringey). All of the town centres in Islington are identified for *medium growth.*[22]
- Within the CAZ strategically important hotel provision should be focussed on its opportunity areas[23], with smaller scale provision in CAZ fringe locations with good public transport. Further intensification of provision in areas of existing concentration should be resisted, except where this will not compromise local amenity or the balance of local land uses.
- It may be appropriate to locate visitor accommodation related to major visitor attractions of sub-regional or greater significance in locations other than those set out in above, but only where it can be shown that no suitable site in one of these locations exists and that there is a clear link in scale, nature and location (particularly demonstrating sufficient proximity to minimise the overall need to travel and maximise walking and cycling) between the accommodation and the attraction being served.
- There is support for provision for business visitors, including high quality, large scale convention facilities in or around the CAZ.
- There is a need for apart-hotels.

[22] Town centres with moderate levels of demand for retail, leisure or office floorspace and with physical and public transport capacity to accommodate it.

[23] In Islington, these are the Kings Cross and City Fringe Opportunity Areas and the Farringdon/Smithfield Intensification Area.

- Developments should not result in the loss of strategically important hotel capacity.[24]
- All types of visitor accommodation are supported.

3.9 Policy 4.6 Support For and Enhancement of Arts, Culture, Sport and Entertainment supports the continued success of London's diverse range of arts, cultural, professional sporting and entertainment enterprises. The Angel Islington is highlighted as an example of other arts, cultural and heritage facilities of more than local importance.

Draft Central Activities Zone SPG

3.10 The draft CAZ SPG was published by the Mayor of London in September 2015 and includes reference to hotel development. It states that hotels (along with conference centres) are part of the strategic functions provided by the CAZ and reiterates London Plan Policy 4.5, as follows.

- Benchmark target of 40,000 net additional hotel bedrooms by 2036. The SPG notes the potential impact of the deregulation of short term lets but states that it is unclear how this may affect demand.
- Avoidance of concentrations of hotel uses within parts of the CAZ that might constrain other important strategic activities (office and other commercial and leisure uses).
- Strategically important hotel development[25] will be focussed in opportunity areas and for smaller scale provision to be guided to CAZ fringe locations.
- There are exceptional circumstances where hotel accommodation may be outside of opportunity areas and CAZ fringe locations.

The Mayor's Tourism Vision 2006-2016

3.11 The Tourism Vision 2006-2016[26] states that London will be the number one city of choice for visitors and the leading world city. The Vision includes the following.

- Maintaining and developing London as a top international destination and principal UK gateway for visitors, tourism and investment.
- The role of tourism in contributing to strong, long-term economic growth, social inclusion and the achievement of environmental sustainability.
- The need for an International Convention Centre.

3.12 The Vision estimates that 40,000 extra hotel rooms will be required between 2007 and 2026. Because there will be a loss of hotel and B&B rooms during this period, in order to achieve this target a total of 50,000 new rooms will need to be built. The Vision also noted the developer criteria for new hotels, as follows.

- Proximity of strong commercial and leisure demand drivers.

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[24] Strategically important hotel capacity will depend on local circumstances, but typically comprises development exceeding 100,000 sq m in the City, 20,000 sq m in Central London and 15,000 sq m outside Central London.

[25] Exceeding 100,000 sq m in the City of London and 20,000 sq m in Central London, although Boroughs have the flexibility to apply lower thresholds

[26] London Development Agency, 2006, London Tourism Vision

- Good transport links.
- Availability of visible, affordable sites.

London Tourism Action Plan

3.13 The Action Plan[27] includes facilitating a structured approach to accommodation development in London, as well as increasing the number of accessible rooms.

London Economic Development Strategy

3.14 The Mayor's Economic Development Strategy for London[28] notes the capital's role as a centre for government, finance, commerce, culture, media and tourism. As part of the Strategy, the Mayor will also encourage the tourist industry to improve the quality of the tourism offer and continue promotion efforts directed at emerging markets. The Strategy also encourages further improvements in London's position in the business visitor market, which is currently less strong than in the leisure visitor market. This will be based on exploiting fully the benefits from current private investment such as the provision of major convention facilities and planned expansion of some existing venues.

Cultural tourism vision for London

3.15 The Cultural Tourism Vision for London[29] sets the objective of more cultural tourism visitors to London. The vision states that culture is the main attractor for visitors to London and that cultural tourism is increasing.[30] The Vision states that visitors are looking to discover authentic, distinctive, local culture; and that there is great potential in London's smaller cultural organisations along with the more authentic and lesser known places that cultural visitors want to visit. The Vision plans for better awareness of popular and lesser known cultural events and attractions.

Islington Core Strategy

3.16 The Core Strategy[31] notes that the Borough is a popular place to live and visit and is valued for its built environment. In addition, Islington's mix of shopping, restaurants, evening economy, rich architecture and walkable environment draws visitors wishing to explore beyond the standard tourist attractions of central London. The Core Strategy notes that Islington has good cultural and leisure provision with a number of major attractions such as Sadler's Wells theatre, as well as cinemas, community halls, public meeting place(s), and historic public houses. The Core Strategy objectives include encouraging new hotels/visitor accommodation where it benefits Islington's economy and enhances the local area.

3.17 Policy CS14 deals with retail and services, including new development. Hotels fall within the scope of this policy. The policy states that any major retail and leisure development should be located in one of the Borough's four town

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[27] London Development Agency, 2009, London Tourism Action Plan 2009-13
[28] Mayor of London, 2010. The Mayor's Economic Development Strategy
[29] Mayor of London, 2015, Take a Closer Look
[30] Cultural tourism now accounts for 37% of world travel and is growing fast – at a rate of 15% year on year - Tourism and Intangible Cultural Heritage 2012, World Tourism Organisation reported in Mayor of London, 2015, Take a Closer Look
[31] LB Islington, 2011, Core Strategy

centres (Angel, Nag's Head, Archway and Finsbury Park) in accordance with a sequential assessment. Policy CS14 states that hotels and visitor accommodation will help to support the retail and service economy and that the appropriate location for hotels and other visitor accommodation is within town centres.

3.18 Policy CS3 Nag's Head and Upper Holloway Road includes encouraging links between the town centre and Arsenal (Emirates Stadium), to contribute to the wider commercial and tourism opportunities in the area.

3.19 Policy CS7 Bunhill & Clerkenwell includes support for the diversity of assets related to leisure, culture and the arts. Tourism-related development, including hotels, will be encouraged where consistent with Policy 14, to support the visitor economy.

3.20 In relation to existing employment space, the Core Strategy states the principle of protecting specific business floorspace (B-class) within the more general definition of employment floorspace (which includes hotels along with a variety of other uses). This applies within and outside the Central Activities Zone (CAZ).[32]

Islington Development Management Policies

3.21 The Development Management Policies DPD[33] notes that the Borough has potential to increase the capital's supply of hotels over the plan period, with resulting economic benefits. However, it is considered important that hotels do not limit the achievement of other priorities (including economic and housing growth), securing a balance of uses, protecting residential amenity, and addressing local impacts (particularly traffic). The DPD states that proposals will be resisted where they would result in an over-concentration of hotels and similar uses.

3.22 In accordance with the NPPF classification of hotels as town centre uses, Islington's Town Centres are considered to be the most appropriate place for hotel development, followed by parts of the CAZ in close proximity (generally considered to be a walking route of 300 metres or less) to major rail hubs, namely Farringdon, King's Cross, Moorgate and Old Street . DPD Policy DM4.11 states the following:

- Hotels and other visitor accommodation are generally appropriate in the locations specified in the following hierarchy: (1) Designated Town Centres and (2) Areas within the Central Activities Zone that are within the designated City Fringe Opportunity Area or are in close proximity to national railway hubs (generally considered to be a walking route of 300 metres or less).
- New hotel development is required to support the area's primary retail/business/cultural role without compromising economic function/growth; have access to public transport modes; not impact residential amenity; and include facilities for public use.

[32] The area of central London where planning policy promotes finance, tourist, specialist retail and cultural uses and activities.

[33] LB Islington, 2013, Development Management Policies DPD

3.23 Policy DM4.12 states that new cultural facilities that are expected to attract significant numbers of visitors should be located in the Central Activities Zone or the Town Centres.

Finsbury Local Plan (FLP)

3.24 Finsbury Local Plan[34] is the Area Action Plan for Bunhill and Clerkenwell, within the CAZ. Much of the area covered is designated for employment uses and this is split between Employment Priority Area (Office), which is in the far south; and Employment Priority Area (General) which covers a greater area across Bunhill and Clerkenwell.

3.25 Policy BC8 Achieving a balanced mix of uses states that visitor accommodation may be appropriate within the City Fringe Opportunity Area or in proximity to Farringdon station, although potential adverse impacts will need to be mitigated and the visitor accommodation use does not compete with business growth. Paragraph 11.1.9 of the FLP clarifies that appropriate locations for hotels and other visitor accommodation in this part of the Central Activities Zone are in proximity to Farringdon, Old Street and Moorgate stations.

3.26 The Plan identifies some potential hotel sites.

- FLP allocation BC5: City Barbican Thistle Hotel, Central Street, EC1V 8DS – potential for redevelopment for new hotel/hotel with residential.
- FLP allocation BC6: City Forum, 250 City Road, EC1V 2PU – re-use of light industrial for mixed use including hotel.
- FLP allocation BC37: Cardinal Tower, 53 Cowcross Street, EC1M 3HS – Crossrail over-site for office/hotel.
- FLP allocation BC38: Farringdon Place, 20 Farringdon Road, EC1M 3NH – re-use of offices for mixed use including leisure and hotel.
- FLP allocation BC39: Lincoln Place, 50 Farringdon Road, EC1M 3NH - – re-use of offices for mixed use including office and hotel.

Culture matters

3.27 The Cultural Strategy for Islington[35] notes that the Borough's cultural tourism offer is under-utilised. It states that spin-outs from the broader cultural sector and specifically tourism and associated hospitality sectors also add significantly to local employment opportunities. The Strategy states that Islington as a cultural destination is second only to the West End in terms of its theatre offer which in turn plays a significant role supporting the vibrant night-time economy in Upper Street and EC1. The vision includes inclusion, sense of place, economic prosperity, education, health/wellbeing and support for the cultural infrastructure.

Islington hotels topic paper

3.28 The Topic Paper[36] was used to inform the Development Management Policies DPD and provides further insights.

[34] LB Islington, 2013, Finsbury Local Plan DPD
[35] LB Islington, 2010, Culture Matters
[36] LB Islington, 2012, Development Management Policies and Finsbury Local Plan Hotels Topic Paper

- A review of neighbouring borough's hotel policies showed that other London boroughs are taking a similar approach to Islington with regard to positively directing hotel development to specific areas where impacts can be managed and where they meet certain criteria. Typically the preferred locations were town centres/CAZ/away from residential areas; and where general business growth is not compromised.
- Business tourism is likely to be a substantial driver of hotel development in parts of the borough; particularly the CAZ. Business hotel development is more likely to be linked to uplift/refurbishment of office and conference facilities.
- Hotels can lead to a loss of housing or employment land and while hotels can be classified as an employment use, they often provide low employment densities, which means that other employment uses providing higher employment densities would be preferred where there was a conflict over available development land.
- The CAZ has a variety of uses and the national railway hubs offer substantial opportunities for a mix of uses, and therefore hotels are appropriate here. However hotels are not considered to be uniformly appropriate across the entire CAZ, as there are a number of areas where they may compromise the economic/business function or could detrimentally affect residential amenity.
- B class premises provide accommodation to sectors that *drive* economic growth, while other employment-generating use (including hotels) typically provide a *supporting* role. Therefore uses which promote economic growth or help to address housing need should be given priority over other uses (such as hotels).

Summary

3.29 Hotels can help support businesses in an area as well as provide employment and other economic benefits in their own right. This is clearly recognised at a London level in relation to the capital's role as a world class visitor destination. However, hotels play a *supporting* economic role while other business types in B-class accommodation is likely to play a *driving* economic role. Accordingly, it is clear that at a strategic level across London and in Islington, the development of hotels needs to be controlled in order that it does not jeopardise or displace higher value economic uses.

3.30 Hotels are considered a town centre use and therefore there is a presumption that new hotel development will be located in one of the four town centres in Islington. Where hotel development takes place in the CAZ in Islington, it is expected to be in one of the opportunity areas in proximity to major rail hubs (namely Farringdon, King's Cross, Moorgate and Old Street), but policy states hotel development will be directed to town centres in the first instance.

3.31 Business tourism is a key element of the visitor economy in the CAZ and there is support for an international convention centre as well as hotel development. Overall there is a need for 40,000 net additional bedrooms by 2036, and the developer criteria for new development will be as follows.

- Proximity of strong commercial and leisure demand drivers.
- Good transport links.

- Availability of visible, affordable sites.

4.0 Tourism in London and Islington

London

4.1 There were 28.8 million staying visitors in London in 2014, spending 132.5 million bed nights and £14.7bn (Figure 7). Compared to 2008 there has been a steady increase in the number of staying visitors, although 2014 saw a decease. Despite the decrease in staying visitors in 2014, bed nights have continued to rise compared to 2008, as has visitor expenditure.

4.2 Staying tourism in London is predominantly by overseas visitors, who make up 60% of the visitors. Visitors from overseas tend to stay longer (6.2 nights compared to 2.1 nights for domestic visitors) and therefore make up 82% of the bed nights and 80% of the expenditure. Compared to 2008, visitors from overseas have continued to increase, with the exception of 2008-2009.

4.3 The overall fall in staying visitors in 2014 was due to a decrease in the number of domestic staying visitors in London. Since 2008 domestic staying visitors to London have been around 11 million per annum, with a rise to 12 million per annum in 2012 and 2013 and then a fall back to 11 million in 2014.

Figure 7 Volume and value of staying visitors to London

Visits	2008	2009	2010	2011	2012	2013	2014
Visits (m)							
Overseas	14.75	14.21	14.71	15.29	15.46	16.78	17.4
Domestic	11.02	10.65	11.37	11.09	12.15	12.31	11.4
Total	25.77	24.86	26.08	26.38	27.61	29.09	28.8
Nights (m)							
Overseas	90.8	85.7	90.3	91.5	94.3	97.4	108.1
Domestic	26.5	23.5	24.3	27.1	27.7	27.4	24.4
Total	117.3	109.2	114.6	118.6	122	124.8	132.5
Expenditure (bn)							
Overseas	£8.13	£8.24	£8.74	£9.41	£10.08	£11.26	£11.83
Domestic	£2.22	£2.18	£2.41	£2.40	£2.78	£2.79	£2.90
Total	£10.35	£10.42	£11.15	£11.81	£12.86	£14.05	£14.73

Source: GBTS and IPS

Purpose of trip

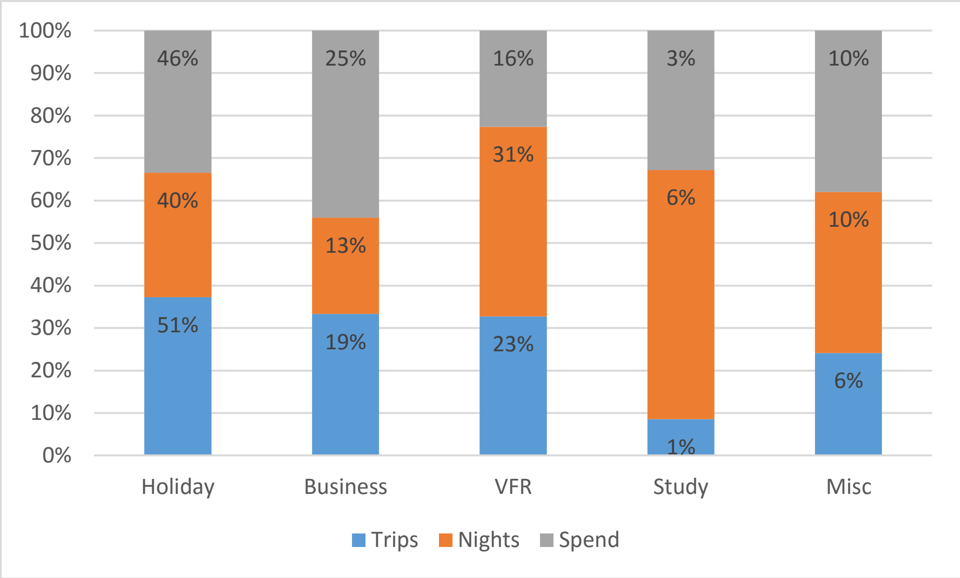
4.4 Just over half of the visitors from overseas in 2014 were in London for a holiday and 19% for business purposes (Figure 8). By contrast, domestic staying visitors were more likely to be visiting friends and relatives etc., and were also more likely than overseas visitors to be on a business trip.

Figure 8 Purpose of trip to London

Visits	Holiday	Business	VFR/study/other	Total
Overseas	51%	19%	30%	IPS 2014
Domestic	31%	28%	41%	GBTS 2012-2014 average

4.5 While holiday trips are the most numerous of the overseas trip types, proportionately business trips are worth more on a per night basis. VFR trips are worth less on a per night basis (Figure 9).

Figure 9 Share of oversea visitor trips, nights and spend by purpose of trip



Source: IPS 2014

Accommodation used

4.6 The most common form of accommodation used by visitors from overseas was hotels, which accommodated almost two-thirds of visits to London (Figure 10). This was followed by staying with friends and relatives, which accounted for 27% of trips. By contrast, domestic visitors are more likely to stay with friends and relatives, although hotels remain important.

Figure 10 Accommodation used

Accommodation	Overseas	Domestic
Hotels or similar	65%	43%
Camping or caravan sites	1%	12%
Other short-term rented	6%	7%
Friends or relatives/own	27%	38%
Other (non-rented or long-term rented)	2%	0%
Source	IPS 2013 London	GBTS 2014 England

4.7 Compared to most other locations in the UK, a much greater proportion of overseas visitors use hotels/guesthouse accommodation in London.

Deregulation of short-term lets

4.8 In May 2015 the law was changed to allow London homeowners to rent their properties out for up to 90 days without applying for planning permission.[37] This brings London into line with the rest of the country. In the past, local authorities in Greater London have had discretion to take enforcement action against short-term letting when they considered it expedient to do so.

4.9 The internet has also seen changing patterns in short-term lets, as new technologies are helping facilitate householders rent out their homes for short periods of time without recourse to traditional letting agencies. It is already possible to arrange short-term lets through websites such as AirBnB, OneFineStay and Gumtree. These types of websites provides an online platform to allow individuals to rent out their homes, rooms or apartments to visitors.

4.10 Short term lets in private homes for leisure or business tourist trips allow visitors to find cheap accommodation in desirable locations, including London where traditional visitor accommodation is relatively expensive. There are indications that these types of short-term lets facilitated by the internet are beginning to have an impact on demand for more traditional visitor accommodation[38] although this varies between destinations.

4.11 Data from Inside Airbnb[39] shows that there is considerable availability from within Islington, with over 2,100 accommodation listings in the Borough (Figure 11 and Figure 12). Note that the data allows multiple listings for the same provider so the 2,100 listings will include multiple rooms in the same property in some cases. The number of listings in Islington is 8% of the total 25,000 listings in London.

Figure 11 Airbnb listings in Islington

Type	Average price	Number of listings
Entire dwelling	£129	1,153
Private room	£56	934
Shared room	£41	28
Grand Total	£95	2,115

Source: Inside Airbnb, December 2015

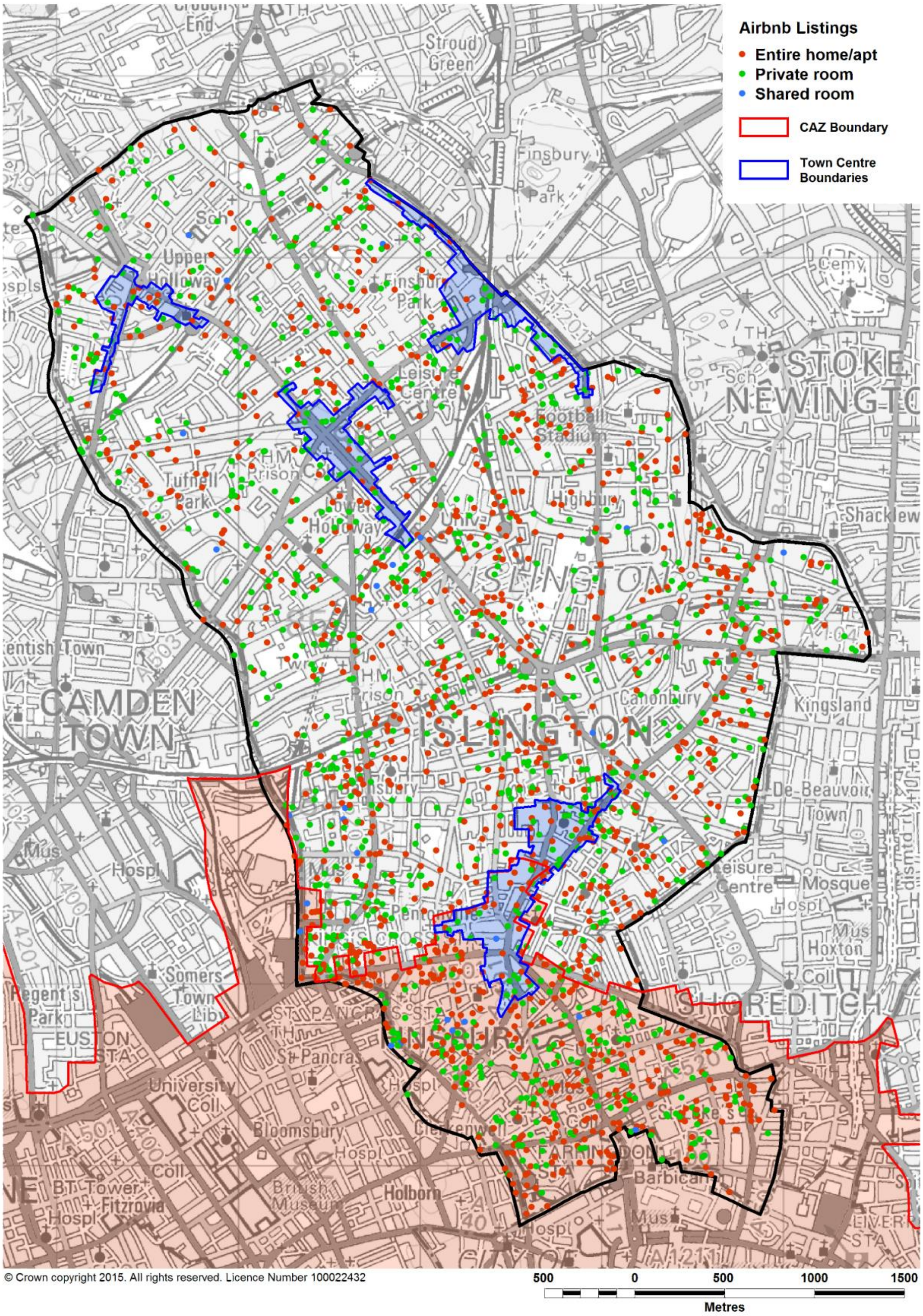
[37] Section 25 of the Greater London Powers Act 1973 states that the "use as temporary sleeping accommodation of any residential premises in Greater London involves a material change of use of the premises and of each part thereof which is so used".

[38] The Economist, 2014, Room for all, for now http://www.economist.com/news/business/21601259-there-are-signs-sharing-site-starting-threaten-budget-hotels-room-all

[39] Inside Airbnb is a community based organisation seeking to understand the impact of internet based short stay letting – see http://insideairbnb.com/about.html

Hotels in Islington

Figure 12 Map of Airbnb listings in Islington



Source: Inside Airbnb, December 2015

Hotels in Islington

4.12 As well as the Airbnb listings there are other internet accommodation providers in Islington such as OneFineStay, who have informed LB Islington that they have between 100- 200 premises in the Borough.

4.13 In assessing the impact of this deregulation there are a number of factors to consider.

- Through the use of these established websites, the internet provides an opportunity for small accommodation providers including private homeowners to reach potential visitors at low/nil cost.
- There is clearly a growing proportion of people who are comfortable with making use of these arrangements, with the opportunity to reduce accommodation costs likely to be at least one of the factors. It is not clear whether these people are displaced from traditional accommodation or are new visitors attracted by these different accommodation opportunities.
- Equally there will be potential visitors who will be dissuaded from short term lets because of the uncertainties around the quality and style of provision and concerns around internet fraud and so on. For these people the reliability of more traditional visitor accommodation will be more important.
- It is also clear that the branded budget hotel sector has also been successful in winning demand from independent hotels and through economies of scale, helping to attract new visitors through the strength of their brand. These attributes have also helped to attract the investment finance required to fuel the growth in supply.
- It is less likely that the full service hotel market will be affected to the same degree as other accommodation types as the users of full service hotels may be less sensitive to price and will probably be looking at the overall hotel experience as an important component of their trip – although there is little data yet available to back up this assumption, and press articles suggest that an increasing number of business visitors are using short term lets arranged using these websites.
- While the deregulation allows short term lettings in London there are reports that this may merely legalise existing providers.[40]

4.14 These issues suggest that there will be an increased use of short term lets in Islington and elsewhere in London although this process will already have started prior to the deregulation. It is possible that this will have a tangible impact on the demand for more traditional forms of accommodation although the data for this is very limited and it would be prudent to keep the matter under review until more information is available. The main surveys used to monitor the types of accommodation used by staying visitors (such as the IPS and GBTS) are likely to record these trips as self-catering/other short term rented, although these categories will also include people staying in aparthotels (which are also a growing part of the market).

Attractions in London and Islington

4.15 London includes a set of iconic places like Buckingham Palace, Big Ben, Piccadilly Circus and the Tower of London, as well as popular cultural

[40] http://www.theguardian.com/travel/2015/feb/10/airbnb-to-be-legalised-in-london

experiences such as the National Gallery or West End shows; and these 'flagships' attract many of the visitors to London[41], particularly those coming for the first time. London's top 20 attractions account for 90% of visits. However, 58% are repeat visitors and these will often seek a more fine grained experience of London.[42]

4.16 Key London attractions include the national museums and historic buildings, as well as open spaces such as Epping Forest (Figure 13). In 2014 the number of visits to attractions in London rose by 2% (compared to the national average of 4%), less than the 8% increase in visits to attractions in London in 2013.

Figure 13 Key attractions in London

Attraction	Entrance	2014 visitors
British Museum	Free	6,695,213
National Gallery	Free	6,416,724
Tate Modern	Free	5,785,427
Natural History Museum	Free	5,388,295
Epping Forest	Free	4,300,000
Victoria and Albert Museum	Free	3,651,450
Science Museum	Free	3,356,072
Tower of London	£10.00 or over	3,081,939
National Portrait Gallery	Free	2,062,502
Westminster Abbey	£10.00 or over	1,786,106
St Paul's Cathedral	£10.00 or over	1,782,741
British Library	Free	1,627,599
National Maritime Museum	Free	1,516,258
Royal Botanic Gardens, Kew Gardens	£10.00 or over	1,367,997
Tate Britain	Free	1,357,878
ZSL London Zoo	Chargeable	1,318,621
Houses of Parliament	Chargeable	1,253,326
Old Royal Naval College	Free	1,026,234
Imperial War Museum London	Free	914,774
Museum of London	Free	902,922
Horniman Museum and Gardens	Free	870,051
Royal Academy of Arts	£10.00 or over	824,793
Royal Observatory Greenwich	Chargeable	785,963
Tower Bridge Exhibition	£7.50 to £9.99	646,659
Hampton Court Palace	£10.00 or over	566,457
Churchill War Rooms	£10.00 or over	472,744
Museum of Childhood at Bethnal Green	Free	471,000
Wallace Collection	Free	410,233
Old Royal Naval College - Painted Hall	Free	409,249
Kensington Palace	£10.00 or over	402,118
Shakespeare's Globe	Chargeable	357,886
Royal Air Force Museum London	Free	347,717

[41] Mayor of London, 2015, Take a Closer Look
[42] IPS, reported in Mayor of London, 2015, Take a Closer Look

Source: VisitEngland, 2015, Visitor Attraction Trends in England

4.17 In addition to the commercial and free attractions in London, retail locations such as Oxford Street, Regent Street, Bond Street, the King's Road and Covent Garden all attract visitors, as well as the theatres and performance venues such as the O2. Sporting events also attract visitors, with major football teams (including Arsenal with its stadium in Islington) rugby at Twickenham and tennis at Wimbledon.

4.18 The Visitor Attraction Trends in England included two attractions in Islington.

- Museum of the Order of St John: 33,242 visits in 2014
- Wesley's Chapel, House and Museum of Methodism: 14,385 visitors in 2014

4.19 The cultural infrastructure in Islington includes Arsenal Football Club, the Business Design Centre, Sadler's Wells and Almeida theatres, as well as museums, historic environment and a strong independent retail sector.[43] Arsenal Football Club first team fixtures attract about 1.6m visitors to the stadium per season. Other attractions include the London Canal Museum, Camden Passage antiques village and the King's Head theatre, the Estorick Collection of Modern Italian Art and the Victoria Miro Gallery (all concentrated around the Angel).

4.20 While Islington has a range of cultural facilities, in comparison with some other London Boroughs, Islington has few major tourist attractions. Research undertaken in 2013[44] showed that tourists considered Islington's environment to provide an uncontrived vitality where London can be experienced in an authentic fashion, away from the main tourism hotspots.

Economic impact of tourism

4.21 It is estimated that tourism supported 226,000 jobs in London, which is approximately 5% of all employment in London.[45] This is lower than the estimates for 2005-2008. 45% of these jobs are in restaurants, bars etc. (approximately 100,000). The GVA from tourism in London is £6.6bn out of the UK total of £34.3bn. It is estimated that around 44,000 people are employed in the accommodation sector in London.[46]

4.22 It is estimated that Islington's share of the tourism expenditure is approximately 2% of London's total, and a simple application of this proportion suggest that 880 jobs may be supported by tourism in Islington, with a GVA of £132 million. Within this, 30% of the expenditure was by visitors from overseas, 62% was day visitors and 7% from domestic staying visitors.

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[43] LB Islington, 2010, Culture Matters

[44] Robert Maitland, 2013, Backstage behaviour in the global city: tourists and the search for the 'real London'

[45] GLA, 2012, Working Paper 53. Note that this includes the spend from non-local day visitors as well as from domestic and overseas staying visitors.

[46] BRES, reported in GLA, 2012, Working Paper 53

Summary

4.23 In London the number of visitors from overseas has been growing while the number of staying visitors from within the UK has been falling. The net effect has been a growth in visitors, bed nights and spend. Overseas visitors are more likely to be on holiday while visitors from the UK are more likely to be visiting friends and relatives, or on business. The most common form of accommodation used by visitors from overseas was hotels, followed by staying with friends and relatives. By contrast, domestic visitors are more likely to stay with friends and relatives, although hotels remain important.

4.24 The high profile iconic attractions in central London attract the majority of London's visors, and Islington is not well-represented with these facilities. However, there is also an interest in authentic experiences of the other areas of London, including Islington. Sports events and culture are also important components of tourism and this includes Arsenal Football Club and the Sadler's Wells theatre in Islington. It is estimated that tourism supported 226,000 jobs in London, which is approximately 5% of all employment in London. Islington's share of the tourism expenditure is approximately 2% of London's total i.e. approximately 880 jobs.

4.25 The deregulation of short term lets along with the emergence of B&B letting websites such as Airbnb and One Fine Stay has the potential to change the way that visitors use accommodation in London. There are over 2,100 listings in Islington, 8% of the London total. It is not yet clear whether this use of 'informal' accommodation will attract new visitors or displace visitors from 'traditional accommodation.

5.0 Hotels in London and Islington

London's hotel industry

5.1 The London hotels census[47] recorded 1,218 hotels providing approximately 117,000 rooms in autumn 2013; meaning that the hotel capacity in London is approximately 42.7 million room nights available a year. Based on an average of 1.75 beds per hotel room, this converts to approximately 75 million bed spaces. The West End provides 16% of London's hotel stock and 22% of the rooms.

5.2 In 2013 there were 31 hotels with 4,700 rooms under construction, and another 21,600 rooms in the five year pipeline. London's hotel market is fundamentally different to that of the remainder of the country, characterised by higher occupancy rates, higher average daily room rates and far higher levels of profitability. London gross operating profit per available room was £73.65 in September 2012, compared to £26.01 elsewhere in England.[48]

5.3 By category there are more budget hotels in London (37%) although there are more rooms in upscale hotels (29%). Luxury hotels (5-star) make up 10% of the rooms in London and 7% of the establishments. The 2013 London Tourism Report by London & Partners states that the luxury hotels sector has

[47] STR Global London Survey 2013, reported in London & Partners, 2014, London Tourism Report 2013-2014

[48] TRI Hospitality as reported in BHA, 2012, Trends and Developments

attracted significant development in the last three years, and that a large number of the economy hotels are small guest-house style properties, many with less than 20 rooms. However, in the past five years, leading budget chains have driven growth in the category.

5.4 In addition, the London Tourism Report 2013-14 states that the largest hotel in the capital is the independently owned Royal National Hotel in Bloomsbury (Midscale with 1,630 rooms), followed by Hilton's London Metropole in Paddington (Upper Upscale with 1,054 rooms). Almost half of London's hotels have 50 rooms or less, with 90% of these being independently owned, and approximately 50% are Economy hotels.

5.5 Within London, the West End followed by Earl's Court/Kensington/Chelsea and Paddington/Bayswater/Notting Hill are the main locations for hotels, together accounting for 45% of establishments and rooms (Figure 14).

Figure 14 Hotels in London, 2013

	Establishments		Rooms	
Type				
Economy	449	37%	26,282	23%
Midscale (3-star)	117	10%	11,236	10%
Upper Midscale	132	11%	13,321	11%
Upscale (4-star)	289	24%	33,576	29%
Upper Upscale	149	12%	20,488	18%
Luxury (5-star)	82	7%	11,869	10%
Total	**1,218**		**116,772**	
Number of rooms				
1,000+	4	0.3%	4,722	4.0%
750-999	5	0.4%	4,217	3.6%
500-724	11	0.9%	6,615	5.7%
250-499	76	6.2%	25,752	22.1%
100-249	259	21.3%	40,796	34.9%
50-99	272	22.3%	19,253	16.5%
<50	**591**	**48.5%**	15,417	13.2%
Total	**1,218**		116,772	
Location				
London West End	191	15.7%	25,217	21.6%
Earls Court/Kensington/Chelsea	184	15.1%	15,160	13.0%
Paddington/Bayswater/Notting Hill	175	14.4%	12,857	11.0%
North Central London (Inc Islington)	108	8.9%	11,975	10.3%
The City/Shoreditch	62	5.1%	9,758	8.4%
South Central London	58	4.8%	8,816	7.5%
Knightsbridge/Pimlico/ Victoria	100	8.2%	7,065	6.1%
Outer London South	98	8.0%	6,366	5.5%
Docklands/Greenwich	34	2.8%	5,700	4.9%
Outer London West	78	6.4%	5,073	4.3%
Outer London North	63	5.2%	4,681	4.0%
Outer London East	67	5.5%	4,104	3.5%
Total	**1,218**		116,772	

Hotels in Islington

Source: STR Global London Survey 2013, reported in London & Partners, 2014, London Tourism Report 2014

5.6 North Central London, which includes Islington, has 108 establishments with almost 12,000 rooms (9% of establishments and 10% of rooms). The London Tourism Report states that the City of London has traditionally been under-supplied with hotel accommodation, with most business visitors to the Square Mile using facilities in adjacent districts. However, development in Shoreditch has helped to build capacity. There has also been hotel development in the Docklands, with further growth opportunities from the enlarged Excel Convention Centre.

5.7 Figure 15 shows the hotel development pipeline in Islington, as listed in the London Hotel Development Monitor.[49] The total rooms under construction, probable and possible totals just over 2,000. This compares to Tower Hamlets and Hillingdon with over 5,000 each, the City of London, City of Westminster, Hounslow, Newham and Brent with over 3,000 each. Islington's total is similar to Greenwich, Hackney, Hammersmith & Fulham, Lambeth and Southwark. The distribution of new hotel development will be a combination of factors affecting local demand (e.g. Canary Wharf, Heathrow) as well as site availability.

5.8 VisitBritain states that between 2005 and 2012 the number of 5-star rooms in London increased by nearly 4,000 to 15,220 while the number of budget hotel rooms increased by 9,700 to 26,000.[50] The GLA estimates that the growth in supply of serviced rooms since 2002 has been approximately 2,400 rooms per year[51], with a significant increase between 2010 and 2012. The increase in supply was expected to be continued through to 2015. Based on a review of forecast visitor nights[52] the GLA estimates that there needs to be an additional 1,800 net new serviced rooms in London per annum to 2036 (a total of 42,900 between 2012 and 2036). This target is based upon forecast additional visitors and so would include developments currently in the pipeline. Note that the London Plan sets broadly similar targets – 40,000 net new rooms by 2036.

5.9 The GLA's estimate of visitor accommodation stock in London in 2012[53] is lower than the London & Partners estimate (GLA 772 hotels against L&P 1,218 hotels; GLA 108,200 hotel rooms against L&P 116,772) although this is likely to be down to definition as while the GLA separates out B&B/Hostels these appear to be included within the London & Partners figures.

5.10 The GLA also considers self-catering and campus accommodation, which was estimated to total 437 establishments with 34,100 rooms. However two thirds of this is campus accommodation, which only has partial availability through the year, and as a result hotels were considered to be the main form of visitor

[49] London & Partners/CBRE, 2014, London Hotel Development Monitor
[50] AM:PM Hotels reported in VisitBritain, 2013 Foresight Issue 118
[51] GLA, 2013, Working Paper 58
[52] GLA, 2013, Working Paper 58 – Various forecasts of future visitor trends were reviewed, noting that they varied widely and were subject to uncertainties from a variety of extraneous factors. The study came to a view about the ration between rooms and visitors, and then factored this up using forecast changes in visitors.
[53] GLA, 2013, Working Paper 58

accommodation available in London. The additional hotel accommodation target takes account of campus accommodation. The London and Partners 2014 Tourism report did not consider campus accommodation.

Figure 15 Current hotel development pipeline in Islington

Status	Hotel	Location	Rooms	Development type	Grade
Under construction	Jurys Inn London Islington	60 Pentonville Rd/34-41 White Lion St, N1 9LA	143	Extension	Budget
Probable	Premier Inn London Archway	Highgate Hill, N19 5PH	161	Conversion	Budget
Probable	Mercure London Clerkenwell	2 Clerkenwell Rd, EC1M 5PQ	150	Redevelopment	4-star
Probable	Fonthill Road	129-131 Fonthill Rd, N4 3HH	92	Redevelopment	Budget
Probable	Empire House	136-144 City Rd/207 Old St, EC1V 9NR	27	Extension	4-star
Probable	Hub by Premier Inn King’s Cross	64-68 York Way/3 Crinan St, N1 9AG	408	Demolition & Redevelopment	Budget
Possible	Errol St YMCA	8 Errol St, EC1Y 8SE	146	Extension	Budget
*Possible**	Royal London House	22-25 Finsbury Square, EC2A 1DX	265	Redevelopment	5-star
*Possible**	City Forum	250 City Rd, EC1V 2PU	190	Demolition & Redevelopment	4-star
Possible	Hotel Indigo London Barbican	1 Lamb's Passage, EC1Y 8LE	101	New Development	4-star
Possible	Road	City Road, EC1V	80	n/a	Budget
Possible	Yotel	96-100 Clerkenwell Rd/55 St John's Square, EC1M 5RJ	225	Demolition & Redevelopment	Budget
Possible/on hold	Travelodge London Finsbury Park	185-187 Isledon Rd, N7 7JR	104	Redevelopment	Budget
Possible	City Road	331-333 City Rd, EC1V 1LJ	10	n/a	Hostel
“Probable” includes hotels with detailed consent. “Possible” includes hotels with outline consent that are likely to be constructed, or hotels likely to gain permission. *Note that separate information from LB Islington states that these two developments are now under construction					

Hotels in Islington

Source: London & Partners/CBRE, 2014, London Hotel Development Monitor

5.11 The GLA estimates[54] showed that within Islington, the majority of the accommodation establishments are in the south of the Borough. Islington was estimated to have 4,700 rooms, of which 2,950 were serviced rooms (i.e. hotels or B&Bs). Between 2010 and 2012 there had been relatively little new hotel development in Islington compared to some other parts of London (such as the City, Westminster and Camden). Generally, the most growth in hotel rooms has been seen in the centre of London, and the outer boroughs in the north and south of London that have seen the lowest growth in the number of rooms.

5.12 Most of the new openings have been large hotels and have tended to be either budget branded hotels or luxury hotels, while the establishments that have closed have typically been B&Bs. In terms of the pipeline, relatively little of the new supply is to be in Islington.

5.13 However, the GLA report noted that there is expected to be a shift in new development from Central London to more peripheral areas and that much of the development will be large budget and luxury hotels. Islington's share of the additional 42,900 serviced rooms in London from 2012 to 2036 is 700, based the distribution of current rooms. In addition, Islington may also provide another 600 in other accommodation types (taking the total to 1,300).[55]

Current estimates of hotels in Islington

5.14 Work undertaken as part of this study provides summary data for visitor accommodation in Islington.[56] It is estimated that there are currently 49 visitor accommodation establishments, with 3,421 rooms in hotels, guesthouses and B&Bs, plus 361 rooms in apart-hotels and 713 rooms/beds in hostels[57].

Figure 16 Current estimates of visitor accommodation in Islington

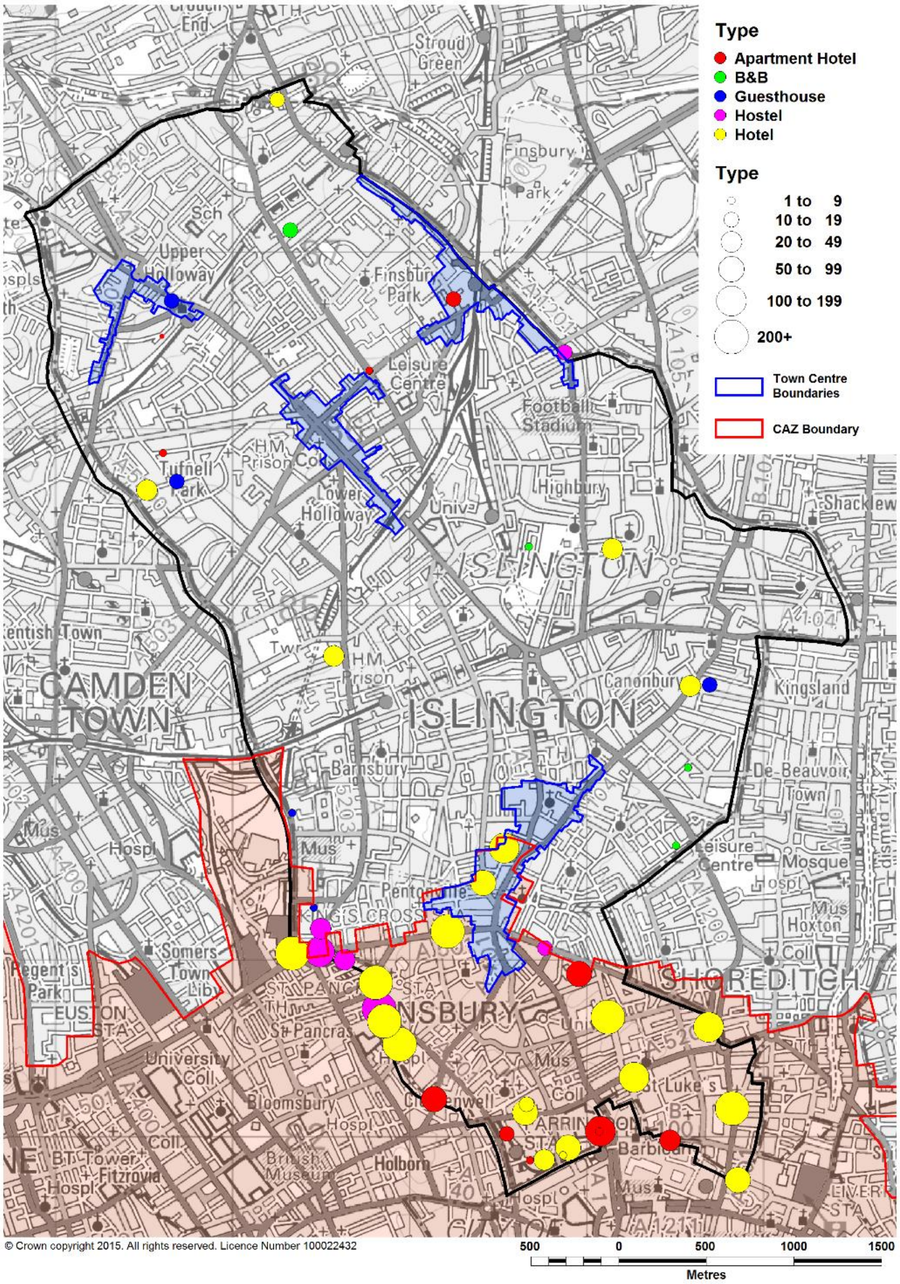
Type	Establishments	Total Rooms
Apart-hotel	11	361
B&B	4	21
Guesthouse	6	65
Hostel	6	713
Hotel	22	3,335
Grand Total	49	4,495

[54] GLA, 2013, Working Paper 58
[55] GLA, 2013, Working Paper 58 – future supply is based upon the current split of rooms by borough.
[56] A review of: establishments listed in the 2006 Islington Hotels Study by Atkins; listings prepared for the 2014 22-25 Finsbury Square Appeal; listings prepared by TBR based on their internal business databases (including Dun & Bradstreet data) and an internet-based search. The review has focussed on hotels, guesthouses, B&Bs, hostels and serviced apartments. The process of undertaking the review has shown that there is further accommodation available for short and longer lets that may be used by visitors or by people who are effectively residents. This latter letting category has not been included in this analysis. The analysis has also not included student accommodation as this is primarily provided for students and only available to other visitors during holidays.
[57] The categorisation of hotels, guesthouses and B&Bs is a judgment based on available information about size and facilities, taking into account the way the business labels itself.

Hotels in Islington

5.15 Figure 17 shows the distribution of all types of accommodation in Islington.

Figure 17 Distribution of all types of accommodation in Islington



Source: Ramidus

5.16 Comparing this with the findings of Islington's 2006 Hotels Study (Atkins) shows some changes, although these are likely to be a combination of real change and some differences in the methodology used to compile the data.

- There are slightly fewer hotels (22 compared to 24 in 2006) but considerably more hotel rooms (3,335 compared to 2,740 in 2006).

Hotels in Islington

- The average hotel size has grown from 114 rooms in 2006 to 152 currently.
- There are fewer B&Bs (4 compared to 8 in 2006).
- There are about the same number of guesthouses (6 compared to 5 in 2006).
- More apart-hotels (11 compared to 1 in 2006) with more rooms (361 against 129).

5.17 There are now seven hotels and one hostel with over 200 rooms in Islington (six in 2006); as well as three hotels, one hostel and one apart-hotel with between 100 and 199 rooms (compared to four hotels in this size band in 2006). Hotels with over 100 rooms now make up 45% of the hotels in Islington (Figure 18).

Figure 18 Visitor accommodation in Islington by capacity, December 2015

Type	Rooms						
	200+	100-199	50-99	20-49	10-19	1-9	Total
Apart-hotel		1	2	1	3	4	11
B&B					1	3	4
Guesthouse					4	2	6
Hostel	1	1		2	2		6
Hotel	7	3	4	5	2	1	22
Grand Total	**8**	**5**	**6**	**8**	**12**	**10**	**49**

5.18 Many of the hotels in Islington are not part of a formal grading system or easily categorised, and these will include provision at a variety of quality and price standards (Figure 19). Of those that are graded, the largest categories are branded budget hotels (six) and 4-star hotels (5). There is one 5-star hotel in Islington (Southplace Hotel, EC2M 2AF). The full list of visitor accommodation can be found in the annex to this report.

Figure 19 Visitor accommodation in Islington by category, December 2015

Type	Ungraded	Branded Budget	2	3	4	5	Grand Total
Apart-hotel	10			1			11
B&B	4						4
Guesthouse	4		1	1			6
Hostel	6						6
Hotel	7	6	1	2	5	1	22
Grand Total	**31**	**6**	**2**	**4**	**5**	**1**	**49**

Hotels in Islington

Figure 20 Average and total rooms in Islington by type, December 2015

Type	Average rooms	Total rooms	Total Establishments
Apart-hotel	33	361	11
B&B	5	21	4
Guesthouse	11	65	6
Hostel	119	713	6
Hotel	152	3,335	22

Recent consents and proposed developments in Islington

5.19 Since April 2001 there have been 53 consents involving hotels or apart-hotels in Islington[58]. These have involved a total of 60,836 sq m of proposed non-residential floorspace, 3,243 hotel rooms and 210 apart-hotel rooms (Figure 21). This total is split about evenly between completed and pipeline for hotel rooms, while apart-hotel rooms are more likely to be completed. Of the 53 projects, 41 have been completed and the remainder are part of extant permissions in the pipeline. Note that not all permissions are increases in the visitor accommodation stock – some involve change of use e.g. to residential, and there are examples of consents for continuation of use as a hotel (although this will not involve any additional rooms). There are also applications to extend the time limit for implementation.

Figure 21 Hotel/apart-hotel consents in Islington since 2001

Status	Proposed non-residential floorspace sq m[59]	Hotel rooms gain	Apart-hotel rooms gain	Total gain
Completed	28,529	1,696	131	1,827
Granted	1,199	304	0	304
Started	31,108	1,243	79	1,322
Pipeline	32,307	1,547	79	1,626
Total	**60,836**	**3,243**	**210**	**3,453**

Source: London Development Database August 2015

5.20 There are currently nine consented and started hotel projects in Islington (Figure 22). The larger projects include over 400 rooms in York Way (Kings Cross N1) and over 250 rooms in Finsbury Square (EC2). All except two of the larger hotel projects are started.

[58] London Development Database August 2015
[59] Likely to include non-visitor accommodation floorspace for mixed use developments.

Figure 22 Pipeline hotel projects in Islington

Location	Postcode	Hotel rooms gain	Status
4-10 Clerkenwell Road; 29-39 Goswell Road	EC1M 5PQ	142	Started
22-25 Finsbury Square	EC2A 1DX	256	Started
21 Highgate Hill	N19 5PH	157	Started
250 City Road	EC1V 2PU	190	Started
129-131 & 133 Fonthill Road	N4 1XX	92	Granted
62-68 York Way	N1 9AG	408	Started
185-187 Isledon Road	N7 7JR	79	Started
96-100 Clerkenwell Road	EC1M 5RJ	212	Granted
157 Caledonian Road	N1 0SL	11	Started
Total larger hotel projects		**1,547**	

Source: London Development Database August 2015

5.21 Similarly, the pipeline of apart-hotels comprises three projects totalling 79 rooms (Figure 23). Figure 24 maps the hotel and apart-hotel projects listed in Figures 22 and 23.

Figure 23 Pipeline apart-hotel projects in Islington

Location	Postcode	Apart hotel rooms gain	Status
116 Upper Street	N1 1AA	54	Started
65-70 White Lion Street	N1 9PP	20	Started
77-78 Chapel Market	N1 9ET	5	Started

Source: London Development Database August 2015

5.22 The GLA benchmark targets for new visitor accommodation in Islington are 700 hotel rooms and 600 other rooms over the period 2012-2036. The projects noted above have 1,547 hotel beds and 79 other beds, which suggests that the overall target of 1,300 rooms will be exceeded by 25%. However it is possible that some of the existing accommodation businesses will cease operating and so this will need to be kept under review.

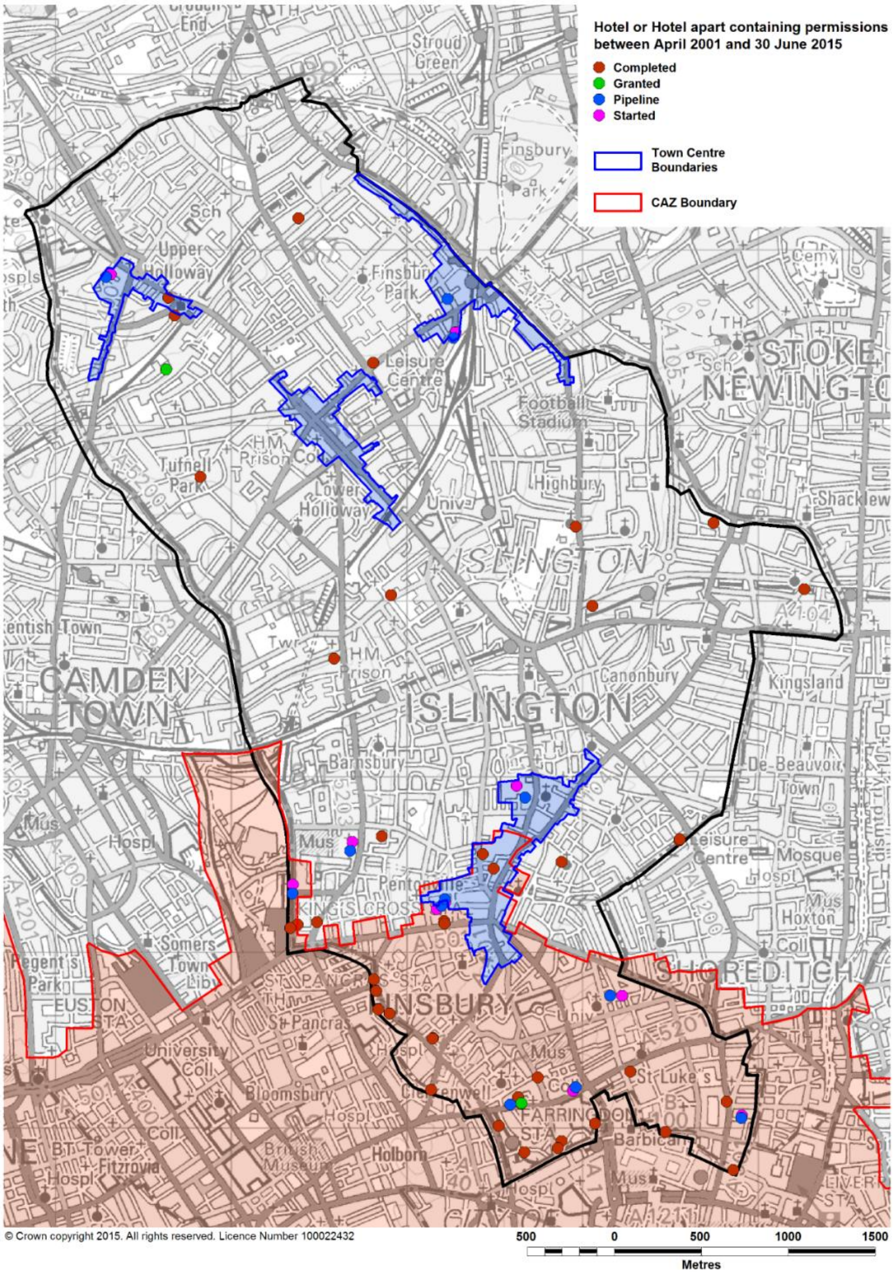
5.23 The pipeline projects are listed in Annex 2.

Land use competition

5.24 The ability of hotel development to compete for sites with other forms of development (particularly offices but also student accommodation and residential accommodation) will depend on the values generated and the ability to pay for sites. Information is available from the studies compiled as part of the evidence base for the LB Islington Community Infrastructure Levy (CIL). This shows that the capitalised values for offices in Islington vary between £5,800/sq m and around £2,500/sq m.[60] The higher values are seen in the south of the Borough.

5.25 The capital values for budget hotels are generally higher (except for peak office values), and range between £5,200/sq m and £5,600/sq m.[61] Again the higher values are for locations in the south of the Borough. Full service hotels have higher values again, ranging between £5,400/sq m and £6,900/sq m.

Figure 24 Location of pipeline projects in Islington



Source: London Development Database August 2015

[60] Estimates based on BNP Paribus, 2013, Community Infrastructure Viability Study
[61] Estimates based on BNP Paribus, 2013, Additional Viability Testing for Hotels

Hotels in Islington

5.26 The CIL Viability Study considered that student accommodation is generally more profitable than other forms of development in Islington, although the Islington Core Strategy and Development Management Policies restrict new student development to University Campus areas (City University and London Metropolitan University).

5.27 The ability to compete for sites will depend on a scheme's residual value after development and policy costs have been accounted for. The viability research presents a variety of residual values set against different site values although the chosen CIL rates are a reasonable proxy for the ability of different uses to pay for sites (CIL rates are based upon viability not policy). The CIL rates are split between Area A (the south of the Borough and near King's Cross) and Area B.

Figure 25 Community Infrastructure Levy rates in Islington

Use	CIL rate (£/sq m)	
	Area A	Area B
Residential dwellings (Use classes C3, C4); Residential institutions (Use class C2, C2A), not including: Public Health Facilities and Public Care Facilities	£300	£250
Retail (Use classes A1, A2, A3, A4, A5)	£175	£125
Hotels (Use class C1), apart-hotels	£350	£250
Offices (Use class B1a)	£80	£0
Student accommodation	£400	
Conference centres; nightclubs; private members' clubs; amusement centres; Assembly and leisure (Use class D2), not including public leisure facilities	£80	

5.28 The differential between the CIL rates provides an indication of the viability and the ability to pay for sites. The spread of CIL rates suggest that if unconstrained, student accommodation will have the greatest ability to pay for sites, followed by hotels/general residential, and then retail uses. Office development is less viable than these other uses. This suggests that without planning constraints hotels may be able to compete for sites with office development in most locations.

6.0 Conclusions

6.1 The average UK hotel has 16 rooms, while the average budget hotel has 80 rooms. There are around 118,556 serviced accommodation rooms in London, which is 16% of the UK total. Almost 40% of rooms nationally are in branded hotels (as part of a corporate chain or consortia), rising to 61% in London. Forecasts suggest that two-thirds of hotel rooms will be branded by 2030.

6.2 Major brands bring marketing muscle to hotel owners, including global reservations systems, sales organisations, and customer databases. Often these are supported by loyalty schemes and consumer advertising. Furthermore, finance for development is often available at more favourable rates for large businesses, where the risk is spread across the whole portfolio and there is a known trading performance.

6.3 Occupancy rates in London are higher and less volatile than across England. The fall in London occupancy rates was only apparent in 2008 and rates have increased since then. Other indicators for hotels in London also show improvement, including achieved rates and revenue per available room.

6.4 In London in 2013 there were 31 hotels with 4,700 rooms under construction, and another 21,600 rooms in the five year pipeline. The GLA estimates that there needs to be an additional 1,800 net new serviced rooms in London per annum to 2036 (a total of 42,900).

6.5 The luxury hotels sector has attracted significant development and while a large number of the economy hotels are small guest-house style properties, branded budget chains have driven growth in this part of the market.

6.6 Within London, the West End followed by Earl's Court/Kensington/Chelsea and Paddington/Bayswater/Notting Hill are the main locations for hotels. North Central London, which includes Islington, has 108 establishments with almost 12,000 rooms (9% of establishments and 10% of rooms). The likely growth of in the number of hotel rooms in Islington is less than many other areas in London. However, the GLA report noted that there is expected to be a shift in new development from Central London to more peripheral areas and that much of the development will be large budget and luxury hotels. Within Islington, the majority of the accommodation establishments are in the south of the Borough.

6.7 Work undertaken as part of this study estimates that in Islington there are currently 49 visitor accommodation establishments, with 3,421 rooms in hotels, guesthouses and B&Bs, plus 361 rooms in apart-hotels and 713 rooms/beds in hostels. Compared to 2006, there are fewer hotels but more hotel rooms; fewer B&Bs; more apart-hotels, and about the same number of guesthouses.

6.8 Hotels with over 100 rooms make up 45% of the hotels in Islington. Of those hotels that are graded, the largest categories are branded budget hotels (six) and 4-star hotels (five). There is one 5-star hotel in Islington. The emergence of apart-hotels as a growing part of the market is apparent in Islington as well as elsewhere in London.

6.9 Since April 2001 there have been 53 consents involving hotels or apart-hotels in Islington. These have involved a total of 3,243 hotel rooms and 210 apart-hotel rooms. The scale of past development suggests that there has been some considerable churn in the past, with new stock replacing older visitor accommodation. In addition, the scale of the new stock in the pipeline suggests that a net growth in the Borough's hotel stock will take place over the next few years, in excess of the current GLA's benchmark targets for the Borough (25% above the targets). Against Islington's benchmark target for new visitor accommodation, 1,300 rooms by 2036, the pipeline of extant permissions will deliver a net increase of 1,626 rooms.

6.10 As noted in Section 4.0, the deregulation of short-term lets along with the emergence of B&B letting websites has the potential to change the way that visitors use accommodation in London. There are over 2,100 listings in Islington, 8% of the London total. It is not yet clear whether this use of 'informal' accommodation will attract new visitors or displace visitors from 'traditional accommodation.

6.11 The strong viability for hotels suggests that without planning constraints they may be able to outbid office uses in most parts of the Borough. The review of London-wide and Islington plans indicate that outside specified locations, unconstrained replacement of offices with hotels will conflict with policies designed to protect core employment areas.

Annex 1 – Accommodation establishments in Islington

Name	Type	Rooms	Star	Address	Postcode
Citadines Barbican London	Apart-hotel	129	3	7-21 Goswell Road	EC1M 7AH
Citadines St Marks Islington	Apart-hotel	80	Ungraded	300 City Road	EC1V 2PW
Rosebery Apart-hotel	Apart-hotel	58	Ungraded	20-26 Rosebery Avenue	EC1R 4SX
London City Suites by Montcalm	Apart-hotel	25	Ungraded	43-46 Chiswell Street	EC1Y 4SB
SO Arch	Apart-hotel	19	Ungraded	1 Pemberton Gardens	N19 5RR
Blueprint Living Apartments	Apart-hotel	14	Ungraded	66 Turnmill Street	EC1M 5RR
Finsbury Serviced Apartments	Apart-hotel	14	Ungraded	13 Goodwin Street	N43HQ
Milestone Apartments	Apart-hotel	6	Ungraded	105a Seven Sisters Rd	N7 7QP
Carena London Apartments	Apart-hotel	6	Ungraded	98 St Georges Avenue	N70AH
Glasshouse Yard	Apart-hotel	5	Ungraded	10, Glasshouse Yard	EC1A 4JN
Zinc House	Apart-hotel	5	Ungraded	19-25 Cowcross St	EC1M 6DH
St George	B&B	10	Ungraded	39 Hanley Road	N4 3DU
Oxford Arms	B&B	6	Ungraded	21 Halliford Street	N1 3HB
B&B	B&B	3	Ungraded	4 Highbury Terrace	N5 1UP
Arlington Avenue	B&B	2	Ungraded	Arlington Avenue	N1 7AX
Five Kings Hotel	Guesthouse	16	2	59 Anson Road	N7 0AR
Charlies Hotel	Guesthouse	15	Ungraded	63 Anson Road	N7 0AR
Krystals Guest House	Guesthouse	12	Ungraded	754 Holloway Road	N19 3JF
Kandara Guest House	Guesthouse	11	3	68 Ockendon Road	N1 3NW
Central Station	Guesthouse	7	Ungraded	37 Wharfedale Road	N1 9SD
Kings Cross Guesthouse	Guesthouse	4	Ungraded	36 E Outram Place	N1 0UX
Clink 78	Hostel	500	Ungraded	78 King's Cross Rd	WC1X 9QG

Hotels in Islington

Name	Type	Rooms	Star	Address	Postcode
Keystone House	Hostel	140	Ungraded	272-276 Pentonville Road	N1 9JY
SO Kings Cross	Hostel	27	Ungraded	170 Kings Cross Road	WC1X 9DF
Journey Kings Cross	Hostel	20	Ungraded	54-58 Caledonian Rd	N1 9DP
Baggies Backpackers	Hostel	14	Ungraded	333 City Rd	EC1V 1LJ
Arsenal Tavern	Hostel	12	Ungraded	175 Blackstock Rd	N4 2JS
Thistle City Barbican	Hotel	463	4	Central St	EC1V 8DS
Holiday Inn Kings Cross/Bloomsbury	Hotel	405	4	Kings Cross Road	WC1X 9HX
Travelodge (London Central)	Hotel	392	Budget	1-23 City Rd	EC1Y 1AG
Travelodge (London Kings Cross)	Hotel	380	Budget	100 Kings Cross Rd	WC1X 9DT
Premier Travel Inn London Kings Cross	Hotel	266	Budget	26-30 York Way	N1 9AA
Doubletree by Hilton	Hotel	229	3	60, Pentonville Road	N1 9LA
Travelodge (London Farringdon)	Hotel	211	Budget	10-42 Kings Cross Rd	WC1X 9QE
Hilton Islington Hotel	Hotel	184	4	53 Upper Street	N1 0UY
easyHotel	Hotel	162	Ungraded	80 Old St	EC1V 9AZ
Z Hotel Shoreditch	Hotel	111	Budget	136-144 City Rd	EC1V 2RL
Malmaison Charterhouse Square	Hotel	97	3	18-21 Charterhouse Sq.	EC1M 6AH
Premier Inn London Angel Islington	Hotel	95	Budget	18 Parkfield St	N1 0PS
Southplace Hotel	Hotel	80	5	3 South Place	EC2M 2AF
Zetter	Hotel	59	4	86-88 Clerkenwell Rd	EC1M 5RJ
Tommy Miahs Raj Hotel	Hotel	41	Ungraded	336 Essex Road	N1 3PD
Queens Hotel	Hotel	39	2	33 Anson Rd	N7 0RB
Highbury Centre F M C Christian Guest House	Hotel	38	Ungraded	20-26 Aberdeen Park	N5 2BJ
Rookery Hotel	Hotel	33	4	Cowcross St	EC1M 6DS
Hotel Makedonia	Hotel	20	Ungraded	427 Caledonian Rd	N7 9BG

Hotels in Islington

Name	Type	Rooms	Star	Address	Postcode
Zetter Townhouse	Hotel	13	Ungraded	49-50 St John's Square	EC1V 4JJ
Aber Hotel	Hotel	11	Ungraded	89 Crouch Hill	N8 9EG
Fox & Anchor	Hotel	6	Ungraded	115 Charterhouse St	EC1M 6AA

Annex 2 – Pipeline developments in Islington

Granted Date Financial Year	Description	Street	Number	Postcode	Current Status
2007/08	Partial demolition, alteration, extension and change of use of buildings A,B,D F, and associated outbuildings and structures, to provide a mixed use scheme comprising residential (C3), with the creation of 185 new dwellings (127 private and 58 affordable). Change of use of remainder of buildings with 2348 sq m new floorspace to provide: Business (B1) Retail (A1, A2, A3 including relocation of post office counter), leisure (D2) serviced apartments (temporary sleeping accommodation as defined by the Greater London Planning Act 1973) performance space, rehearsal space and theatre storage, with associated access, parking and landscaping.	Upper Street	116	N1 1AA	STARTED
2012/13	Demolition of existing buildings and erection of a part 3, 4 and 5-storey building plus basement comprising 1445sqm of B1 (business) floorspace, 673sqm of flexible A1/A2/A3/B1 (shop/financial and professional services/restaurant/cafe/business) floorspace, 20 serviced apartments, 6 flats, cycle storage and related works. Also conservation area consent ref P110270 submitted.	White Lion Street	65-70	N1 9PP	STARTED
2011/12	The development proposed is external alterations to existing building, erection of a two storey rear extension and change of use to an hotel.	Caledonian Road,	157	N1 0SL	STARTED
2014/15	Section 73 application (minor material amendment) to vary condition 2 (approved plans) of planning permission P010342 dated 10 September 2003 for the: 'Erection of basement and seven storey building (gross floorspace 7296 sq.m.) containing A1 ground floor retail units on Great Sutton Street with return frontage to Goswell Road, an A3 basement and ground floor restaurant on Clerkenwell Road and a C1 hotel with basement fitness centre in the remainder of the new building. Use of upper floors of 'Hat and Feathers' public house as	Clerkenwell Road; 29-39 Goswell Road	2; 4-10	EC1M 5PQ	STARTED

Granted Date Financial Year	Description	Street	Number	Postcode	Current Status
	additional hotel accommodation and linking of them to the new hotel'. The minor material amendments are (summary): A] removal of the retail shop (A1 use class) from the Goswell Road / Great Sutton Street road frontage (ground floor) and the extension of hotel facilities into this space (plus elevation changes to accommodate this); B] removal of the external courtyard from the centre of the site (at ground floor level) and its replacement with a light well to provide light to the basement; C] introduction of a glazed, enclosed walkway at fifth floor level, to the rear of the Goswell Road facing part of the approved building (i.e. D] omission of the hotel bar from fifth and sixth floors and replacement with additional hotel rooms; E] internal alterations and reconfigurations to increase the total number of hotel rooms by 7 (from 135 to 142) F] alterations to the approved elevations to utilise a natural stone cladding to replace the approved metal louvers This application also seeks to amend the original s106 legal agreement (dated 6 May 2003) by removing clause 4.6 which would remove the requirement to secure public access into the originally approved courtyard (applied for removal).				
2014/15	Change of use from Class B1 (offices) to Class C1 (hotel) including ancillary restaurant and bar, demolition of roof level extensions and partial demolition of sixth and seventh floors, erection of 4 additional storeys, provision of new front entrance and access ramp, and associated external alterations.	Finsbury Square	Royal London House, 22-25,	EC2A 1DX	STARTED
2012/13	Alteration to ground floor shop front. Upper floors converted from staff facilities and accommodation to (C1 [Apart-Hotel]) with additional storey at roof level and rear staircase/store extension.	Chapel Market	77 - 78	N1 9ET	STARTED

Hotels in Islington

Granted Date Financial Year	Description	Street	Number	Postcode	Current Status
2013/14	Change of use of floors 1-8 and part ground floor from office use (Class B1) to a 157 bedroom hotel (Class C1) and ancillary restaurant, including re-cladding of the building, demolition of the first floor link building located on the eastern side of the building (connecting to Hill House) along with the retention of 73 existing car parking spaces and the introduction of associated landscaping.	Highgate Hill	Hamlyn House, 21	N19 5PH	STARTED
2014/15	Hybrid planning application for demolition of existing buildings and comprehensive redevelopment comprising full planning permission for all elements (other than Block 9 submitted in outline with appearance reserved) for four blocks ranging from 7 to 9 storeys plus two towers of 42 storeys (up to 155m) and 36 storeys (up to 137m), providing up to 995 residential units; commercial floorspace (Class B1) up to 7,600sqm; affordable workspace (Class B1); relocated data centre; flexible retail/financial and professional services/restaurant/café/drinking establishment/health centre floorspace (Class A1/A2/A3/A4/D1) up to 3,650sqm; crèche (Class D1); and hotel (Class C1) of up to 190 beds; together with public open spaces, up to 1,223 cycle spaces, 225 car parking spaces and ancillary floorspace within a basement and other associated works. This proposal constitutes a departure from the development plan. This application may affect the character and appearance of a conservation area and the setting of a listed building. Town and Country Planning (Listed Building and Conservation Areas) Act 1990 (as amended); Section 67 and 73. AMENDMENTS RECEIVED 12/07/2013 INCLUDING DAYLIGHT AND SUNLIGHT INFORMATION RELATING TO AQUARELLE HOUSE.	City Road	250	EC1V 2PU	STARTED

Hotels in Islington

Granted Date Financial Year	Description	Street	Number	Postcode	Current Status
2014/15	Application to extend the time limit for the implementation of planning permission ref: P090839 dated 19/08/2010 for the: 'erection of a five storey building plus basement to provide for a 92 bedroom hotel and three commercial units comprising: two A1 (shop) units fronting Fonthill Road and a flexible A1 (shop) / A3 (restaurant/cafe) unit fronting Goodwin Street and associated works.	Fonthill Road	129-131 & 133	N4 1XX	GRANTED
2014/15	Demolition of existing building and redevelopment to provide a ground plus six storey building , (with two basement levels), comprising hotel use (Use Class C1) with up to 408 bedrooms and retail floorspace (Use Class A1-A3) at ground level together with associated facilities, plant, landscaping and servicing. Also conservation area consent reference P2013/3207 submitted	York Way	64-66 York Way, 68 York Way	N1 9AG	STARTED
2013/14	Demolition of existing Maryland Hotel and erection of part 5 and part 6 storey building to accommodate a 104 bedroom hotel (use class C1) with associated bar/cafe at ground floor, basement and roof top plant, external cycle parking, refuse and recycling store and a service yard including 1 inclusive access parking bay. This application may affect the setting of a listed building. Town and Country Planning (Listed Building and Conservation Areas) Act 1990 (as amended); Section 67.	Isledon Road	185 - 187	N7 7JR	STARTED
2015/16	Demolition of all existing structures onsite (forecourt shop, canopy and pumps) and the erection of a 8 storey building plus basement levels comprising of a 212 bedroom hotel (Class C1), 5 self-contained residential units (facing onto and entrances onto St John's Square comprising of 4 x 3 beds & 1x 2 bed), the creation of 93 sq metres of office /workshop space (Class B1), 410 sq metres of flexible commercial floorspace (Retail A1 use & Restaurant A3 uses) with a new pedestrian access from Clerkenwell Road to St John's	Clerkenwell Road	96 - 100	EC1M 5RJ	GRANTED

Hotels in Islington

Granted Date Financial Year	Description	Street	Number	Postcode	Current Status
	Square, cycle storage provision, landscaping and associated alterations.				

Source London Development Database August 2015