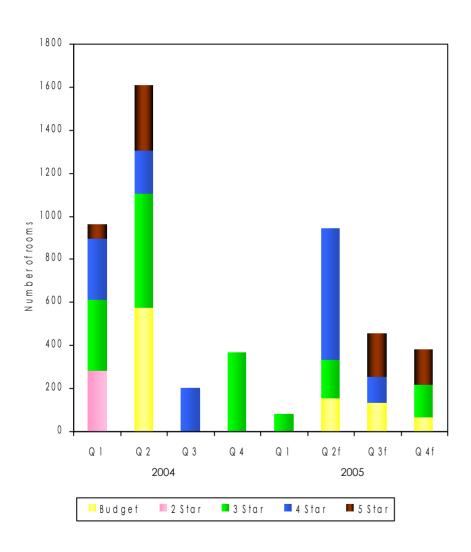


## London - New Hotel Room Supply 2004-2005



#### Introduction

Since 1989, Visit London has been compiling data about new hotel developments across London. This information details new hotel openings, as well as potential developments which are likely to be constructed. This data can help identify gaps in London's hotel market, and geographical areas where hotel coverage is poor.

#### Limitations

Information covers market facing hotels and excludes B&B's, student accommodation and small hotels under 20 rooms. Purely speculative opportunities which are unlikely to proceed are also excluded.

# **Recent Openings**

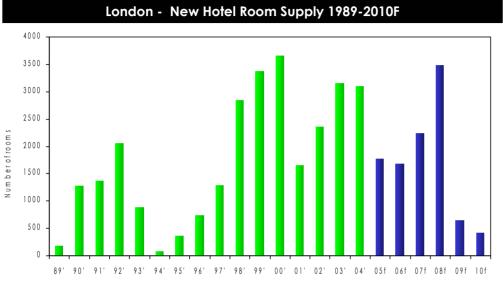
Over the past 18 months, the London hotel market has witnessed a large amount of new built activity. Favourable macro economic conditions, combined with a sustained recovery in visitor numbers to the capital, have helped support this growth. In addition, a number of large redevelopment schemes with significant hotel elements have also come on stream.

All major hotel groups, with the exception of Hilton, have opened new London properties over the last 18 months. A number of smaller hotel companies, such as: Baglioni, Firmdale and Urban Hotels have also entered the London market.

Another factor adding to this growth has been the renewed dash for growth by the major budget operators. Both Premier Travel Inn and Travelodge have committed themselves to expanding their London hubs, with Travelodge recently stating that they need a minimum of 3,000 rooms in central London as soon as possible.

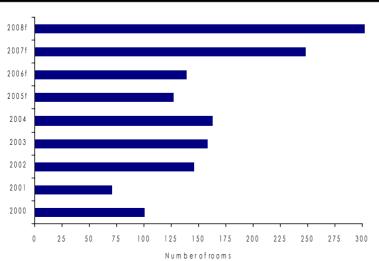
2005 has, so far, seen a continuation of these trends. Budget and major operators have dominated the scene. Further budget openings scheduled for 2005 include: Travelodge extensions in Camden and Islington and a new Premier Travel Inn at Abbey Mills. The much anticipated Easy Hotel is also likely to open this summer.





Forecasts based upon likely completions. Does not include 8,260 rooms which are likely to be constructed but have no firm completion date

# London - Average New Hotel Size 2000-2008F



## **Notes**

Over the next five years, London is set for a period of sustained growth in new hotel developments. Although growth is forecast to be slightly below levels experienced during the boom years of the late 1990s, the volume of projects in the pipeline is still very impressive.

Overall, in our opinion, between 2005-2010, some 10,200 rooms are likely to come on stream. A further 8,260 rooms are also likely to be constructed, but have yet to confirm completion dates.

These forecasts exclude any extra developments arising from London's 2012 Olympic bid. If London were to win the right to host the 2012 games, extra rooms could well be built.

#### Big is best

The recent move towards constructing larger style new hotel developments is expected to continue over the next five years. The average size of a new built property is predicted to double, to equal over 250 rooms.

It would seem that with sites in central London now limited, many operators are now opting for large developments across some of the outer boroughs, rather than smaller schemes in central London.

In addition, a whole host of major regeneration schemes are also freeing up large parts of London for potential hotel developments. In the coming years, huge new hotels are expected to come on stream at Battersea Power Station, Kings Cross, Wembley, and Greenwich.

### Geographic spread

The Docklands area is likely to witness most activity in the coming years. First up, will be the completion of a 272 room Hilton in Canary Wharf, and a Travelodge at London City Airport. Thereafter, new hotels will form part of the Wood Wharf and Crossharbour schemes at Canary Wharf, and developments at Slivertown Quays and Gallions Reach.



lotel .	Location	Borough	Rooms	Grade	Date Due	Operator/Developer
Days Hotel	Long Drive, South Ruislip, HA4	Hillingdon	78	3	Jan-04	Cendant
Excel Ibis	Royal Victoria Dock, E16 1AB	Newham	278	2	Jan-04	Accor
Sydney House*	9-11 Sydney Street, SW3 6PU	K&C	21	Townhouse 4	Feb-04	Private
Crowne Plaza	19 New Bridge Street, EC4V 6D	City	203	4	Feb-04	Intercontinental Hotels
Baglioni Hotel	60 Hyde Park Gate - Kensington	K&C	66	5	Feb-04	Baglioni
Excel Novotel	Royal Victoria Dock	Newham	257	3	Feb-04	Accor
Zetter	86-88 Clekenwell Road	Islington	59	4	Mar-04	Urban Hotel Group
Travelodge Covent Garden*	10 Drury Lane	Camden	163	Budget	Apr-04	Travelodge
Jurys Inn	Chelsea, Imperial Wharf, SW6	H&F	172	3	Apr-04	Jurys Doyle Hotel Group
Ramada Encore, London West	Gypsy Corner, Portal Way, W3	Ealing	150	3	Apr-04	BDL Hotel Group
Premier Lodge	York Way, N1 9DZ	Islington	276	Budget	May-04	Premier Lodge
Saint Gregory	92-102 Shoreditch High Street	Hackney	200	4	May-04	Foxhven Investments
Fullers Red Lion Hotel	Royal Lane, Hillingdon	Hillingdon	55	3	May-04	Fullers
Holiday Inn Express	Priddy's Yard, Firth Road, Croydon	Croydon	156	3	May-04	Intercontinental Hotels
Premier Lodge, Heathrow	Shepiston Lane, Heathrow, UB3 1W	Hillingdon	134	Budget	Jun-04	Premier Lodge
Marriott Hotel & Resorts	15 Hertsmere Road, West India Quay	Newham	301	Apartments 5	Jun-04	Marriott International
Courthouse Hotel	19-21 Great Marlborough Street	Westminster	116	4	Jul-04	Washington Mayfair Hotels
The Soho Hotel	Richmond Mews, Wardour Street	Westminster	85	Boutique	Sep-04	Firmdale Hotels
Jurys Inn Heathrow	Jurys Inn Heathrow	Houslow	364	3	Nov-04	Jurys Doyle Hotel Group
Holiday Inn Express, Swiss Cottage	152-156 Finchley Road	Camden	79	3	Jan-05	Intercontinental Hotels
Travelodge, Tolworth Tower	Tolworth, Kingston	Kingston	120	Budget	Apr-05	Travelodge
Riverbank Park Plaza	12-18 Albert Embankment	Lambeth	475	4	Apr-05	Park Plaza
Total			3808			
Total 2004			3134			
Total 2005			674			

Hotel	Location	Borough	Rooms	Grade	Date Due	Operator/Developer
Holiday Inn Earls Court	North End Road, Fulham, W14 9PJ	H&F	96	3	2005	Splendid Hotels
Holiday Inn Brentford Lock	High Street, Brentford, TW8 8JZ	Houslow	135	4	2005	Splendid Hotels
Easy Hotel	Lexham Garden	K&C	35	Budget	2005	Easy Group
Apex City	Seething Lane, City of London	City	122	4	2005	Apex Hotels
The Knightsbridge	Knightsbridge	K&C	198	Apartments 5	2005	Cheng family/Hyatt Hotels
PremierTravel Inn, Abbey Mills	Merton Abbey Mills, SW19	Merton	132	Budget	2005	Premier Travel Inn
Novotel, Greenwich Station	Greenwich High Road	Greenwich	147	3	2005	Accor
Grange City Hotel*	8-10 Coopers Row, EC3	City	64	5	2005	Grange City Hotels
In & Out Club	Picadilly, London	Westminster	101	5	2005	Simon Halabi
Travelodge Covent Garden*	10 Drury Lane	Camden	30	Budget	2005	Travelodge
Travelodge Islington*	100 Kings Cross Road	Islington	37	Budget	2005	Travelodge
Ibis, Aldgate East	1 Commercial Street	Tower Hamlets	348	2	2006	Columbia Properties/Accor
Travelodge, Romford	Market Place Romford	Havering	60	Budget	2006	Travelodge
Travelodge, Feltham	Feltham High Street	Houslow	115	Budget	2006	Travelodge
Hilton, More London	Southwark	Southwark	245	4	2006	Hilton International
Hilton, Canary Wharf	Discovery Dock, Canary Wharf	Tower Hamlets	272	4	2006	Hilton International
Travelodge, London City Airport	Silvertown Triangle, London City Airport	Newham	157	Budget	2006	Travelodge
City Resort Hotel	Battersea Power Station East	Wandsworth	460	5	2008	Parkview/Hyatt
Conference Hotel	Battersea Power Station West	Wandsworth	670	5	2008	Parkview
Total			3424			
Total 2005	·		1097	·	·	·
Total 2006			1197			
Total 2008			1130			

<sup>\*</sup> Extension to existing hotel

# LONDON HOTEL DEVELOPMENT MONITOR

# **MAY 2005**



PROBABLE						
Hotel	Location	Borough	Rooms	Grade	Date Due	Operator/Developer
Norman Park	Yamton Way, DA17	Bexley	50	Budget	Date Due	Operator/Developer
Wembley Central Shopping Cen	Ramsey House, Wembley	Brent	90	Budget	2006	St Modwen Developments
		Brent	420	5	2006	Quintain Estates/Hilton
Wembley FirstCentral	Wembley Stadium		150	4	2008	
	Park Royal	Brent	210	4		London & Regional Properties
Shubette House Klinger Works	Olympic Way, Wembley	Brent	72			Peter Pendleton & Associates Ikea
0	Edgington Way, DA14	Bromley				Private
Biggin Hill	18 Main Road	Bromley	31 240		0000	Marriott
Marriott St Pancras	King's cross railway station	Camden	38	4	2008	
Radisson Edwarian Mountbatten*	Monmouth Street	Camden		4	0007	Radisson Edwarian
Contemporary Hotel City	Great Winchester Street	City	75	4	2006	Contemporary Hotels
24 Cornhill	24 Cornhill, EC3	City	61			Olivegate Properties
Addington Palace	Gravel Hill, Addington Village	Croydon	65	5	2007	Addington Palace
Aerodrome Classic*	Purley Way	Croydon	65	4		Westmead Business Group
Gpsy Corner - phase 3	Western Avenue	Ealing	150			Frogmore Developments
Greenwich Peninsula	Millennium Dome, Greenwich	Greenwich	650		2007	Anschutz Entertainment
Ibis Hotel Greenwich*	30 Stockwell Street	Greenwich	61	2		Accor
Woolwich Trade Park	Pettman Crescent	Greenwich	100			Halladale Group/Tilfen Land
Quest Hotel Shoreditech	79 Great Eastern Street, Willow St	Hackney	181	Boutique		Quest Hotels
Radisson Edwarian, Bath Road	140 Bath Road, UB3 5AW	Hillingdon	307	4	2007	Radisson Edwarian
Hilton Heathrow T4*	Heathrow	Hillingdon	245	4		Hilton International
Radisson Edwardian, Syon Park	Syon Park Estate	Houslow	154	4	2007	Radisson Edwarian
Houslow Town Centre	Houslow High Street	Houslow	136		2007	Apollo Interntional/Blenheim
Heathrow T5	Heathrow	Houslow	600		2008	Arora/Sofitel
Feltham Town Centre	Feltham Town Centre	Houslow	115			Morely/Travelodge
Bravington's & Albion Railway Yard	Pentonville Road	Islington	266			
181-183 Warwick Road	Warwick Road	K&C	236			Ombeter Properties
Skerne Road	Skerne Road, KT2	Kingston	225			NHP Developments
Marriott St George's Wharf	Vauxhall, SW8	Lambeth	470	4	2007	Marriott
Addington Street	Waterloo	Lambeth	394	<b>Apartments</b>		Galliard Hotels
Silvetown Quays	Dock Mill Road, E16	Newham	200		2008	Silvertown Quays Ltd
Gallions Reach	ManorWay, E16	Newham	100	4		Furlong Homes
Twickenham Stadium	Rugby Road, Twickenham	Richmond	156	4	2006	RFU/Marriott
Normanfield Hospital	Kingston Road, TW11	Richmond	49			Lang Homes
Bear Lane, Southwark	Bear Lane/Great Suffolk Street, SE1	Southwark	113	4	2007	Staybridge Suites/InterContinental Hotel
London Bridge Tower	London Bridge	Southwark	195	5	2009	Sellar Property /Shangri-La Hotels
New Providence Wharf	Blackwall Way	Tower Hamlets	169	4	2007	Radisson Edwardian
Wood Wharf	Canary Wharf	Tower Hamlets	200	4	2009	British Waterways/Canary Wharf Group
Campanile Hotel, Bow Lock	Tweleve Trees Crescent, Bow Lock	Tower Hamlets	140	Budget		Groupe Envergure
Hotel Ship, West India Dock	West India Dock South, Marsh Wall	Tower Hamlets	165			Harbour Quay Hotels
Chelsea Bridge Wharf	Chelsea Bridge	Wandsworth	249	4	2008	Berkeley Homes
Battersea Reach	Gargoyle Wharf, York Road	Wandsworth	150			St George
Theatre Royal Haymarket	Haymarket, Suffolk Place	Westminster	58	Boutique	2006	Firmdale
Great Cumberland Place	Montague Mews South	Westminster	83	Boutique	2006	AB Hotels
Hilton, Paddington*	Praed Street, W2	Westminster	8	4	2006	Hilton International
Marconi House	Strand/Aldwych	Westminster	170	5	2007	Silken Hoteles
Selfridges Hotel	Oxford Street	Westminster	79	-	2008	Selfridges
Jolly St Ermines, Caxton Street*	Caxton Street, SW1H 0QW	Westminster	78	4		Jolly Hotels
Audley Square Car Park	5 Audley Square, W1	Westminster	90			City Of Westminster Corporate Propert
97-99 Charing Cross Road	Old Compton Street/Moor Street	Westminster	44			Consolidated Property
May Fair Hotel	Berkeley Square, W1	Westminster	135	5		Radisson Edwardian
Total	sometry aquate, 111		8488	J		ROGISON EUMAIGIAIT

<sup>\*</sup> Extension to existing hotel

PROBABLE: Hotels with planning permission that are likely to be constructed

21-31 New Oxford Street         New 2212 Harmood Street         2-12           21-21 Harmood Street         2-17           5-7 Monmouth Street         5-7           5-7 Monmouth Street         5-7           5-7 Monmouth Street         19-20           5-27 Etulon Road         23-2           32-32 Etulon Road         23-2           1three Quays House         30-3           2 Merdidlen Selsdon Park*         Add           4-hoenik House         The           Greenwich Reach         Dep           Wooolwich Arsenal         Roy           Kongraret Cassidy House         485           Bedfont Lakes         Bed           Ampton Road         12-3           Viking House         29-3           Staines Road         20-2           Victor Lot Clerkenwell Road         42-2           41 O Clerkenwell Road         42-2           41 O Clerkenwell Road         Gos           Mood Street, Kingston         Vicc           Chessington World of Adventure         Lead           Westminster Bridge Roundabout         Wat	ma House, Wembley, HA9  v Oxford Street  Harmood Street  Hormood Street  Monmouth Street  20 Argyle Square  27 Euton Road  At New Bridge Street  sington Road, CR2  Green, Southhall  Inford Creek  ral Assnal  kway Commerical Centre, E9  Both Road  Ifont Lokes, Cilockhouse Lane  23 Lampton Road, Houslow  28 Lampton Road, Houslow  28 Lampton Road, Houslow  28 Staines Road  motional House building	Brent Camden Camden Camden Camden Camden City City Croydon Ealing Greenwich Greenwich Hackney Hillingdon Houslow Houslow Houslow Houslow Houslow Houslow	325 260 149 240 72 80 172 90 120 73 60 400 146 66 110	4	2009	Private Consoldated Holdings Risetall Papalo Property Poplo Property California Hotels  Londinium Developments Le Meridien TRS Cash & Carry London Merchant Securities Berkeley Group Alimmart S & Property Management MEPC
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Margaret Casidy House         485           Bedfont Lokes         Bed           Lampton Road         12-3           Väking House         29-3           Vähen Brendrad         20-2           North Brendrad Quarter         Inter           126-2248 Bath Road         426-2           4-10 Clerkenwell Road         Gos           Wood Street, Kingston         Vicc           Chessington World of Adventure         Wat           Westminister Bridge Roundabout         Wat	Bath Road Ifont Lakes, Clockhouse Lane 32 Lampton Road, Houslow 31 Lampton Road, Houslow 28 Staines Road emational House building	Hillingdon Houslow Houslow Houslow Houslow	400 146 66			S S Property Management
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Viking House         29-3           Staines Road         20-2           Staines Road         10-1           North Brentford Quarter         Intel           262-244 Bath Road         42-2           4-10 Clerkenwell Road         Gos           Wood Street, Kingston         Vicc           Chessington World of Adventure         Lead           Westminster Brüdge Roundabout         Wat	31 Lampton Road, Houslow 28 Staines Road ernational House building	Houslow Houslow	66			
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Staines Road 20-2 North Breinford Quarter Intel 2622-264 Both Road 262- 4-10 Clerkenwell Road Gos Wood Street, Kingston Chessington World of Adventure Westminster Bridge Roundabout Wat	28 Staines Road ernational House building		110			
262-264 Bath Road       262-         4-10 Clerkenwell Road       Gos         Wood Street, Kingston       Vicc         Chessington World of Adventure       Leat         Westminster Bridge Roundabout       Wat		Harrian				
262-264 Bath Road       262-         4-10 Clerkenwell Road       Gos         Wood Street, Kingston       Vicc         Chessington World of Adventure       Leat         Westminster Bridge Roundabout       Wat			203			Barratt
Wood Street, Kingston Vicc Chessington World of Adventure Leat Westminster Bridge Roundabout Wat	-264 Bath Road	Houslow	20			
Wood Street, Kingston Vicc Chessington World of Adventure Leat Westminster Bridge Roundabout Wat	swell Road/Great Sutton Street	Islinaton	1.50			Omenport Developments
Chessington World of Adventure Leas Westminster Bridge Roundabout Wat	arage Road/Wod Street	Kingston	150	4		
Westminster Bridge Roundabout Wat	therhead Road	Kinaston	1.50			Tussaud's Group
	terloo	Lambeth	743			
Stratford City Strat	tford Rail Lands	Newham	2.000		2020	Stratford City Dev Partnership
	lworth High Street	Southwark	400		2010	Elphant & Castle Development
The second secon	on Town Centre	Sutton	100	3	2008	Golfrate/Accor
St Nicolas Shopping Centre Sutto	on Town Centre	Sutton	200	2	2008	Golfrate/Accor
	st India Quay	Tower Hamlets	266		2008	SKMC
	-437 Hacknev Road	Tower Hamlets	184	Boutique		Templecraft
	-115 Whitechapel Road	Tower Hamlets	40	Boutique		Private
	75 Alie Street.16-17 Plough St	Tower Hamlets	300	4		Inonder
	ssharbour	Tower Hamlets	190			Ballymore Group
	-126 Brick Lane	Tower Hamlets	40			Preem
	Greatorex Street	Tower Hamlets	50			NJ Developments
	arsh Wall	Tower Hamlets	186			Masterworks Development
The Quadrant, Reaent Street Rea		Westminster	131			Crown Estate

<sup>\*</sup> Extension to existing hotel

**POSSIBLE:** Hotels with planning permission that maybe constructed, or hotels likely to gain permission and subsequently built

**London Hotel Development Monitor** is published during the first week of each month. It provides an overview of the likely hotel developments across London. Further information at http://www.visitlondon.com/corporate/facts\_figures/other\_research/index.html

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