EPPING FOREST DISTRICT
Hotel & Visitor Accommodation Needs Assessment

Phase 2 Report

Prepared for:
Epping Forest District Council

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hotel solutions
the hotel development consultancy

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EXECUTIVE SUMMARY

The Purpose of the Visitor Accommodation Needs Assessment

The Epping Forest District Visitor Accommodation Needs Assessment was commissioned by Epping Forest District Council in July 2016 on the back of an agreed strategic Council objective to grow the visitor economy and a recognition that to do so requires the delivery of new visitor accommodation. The purposes of the study were to:

- Provide a clear understanding of the future potential for hotel and visitor accommodation development in Epping Forest District;
- Inform the planning policy approach to hotel and visitor accommodation development in the new Local Plan for the District;
- Advise on other roles that Epping Forest District Council can play to accelerate hotel and visitor accommodation development in the District.

The Phase 1 Findings

Phase 1 of the study, completed in August 2016, showed:

- A need to improve existing low quality hotels in Epping.
- A market need for additional budget hotels in the south of the District, but major challenges for budget hotel companies in competing for sites with higher value uses, in particular residential development.
- Potental for a wide range of visitor accommodation offers in the rural parts of the District, including potentially developments of scale if planning permission can be secured.
- Two key locations of opportunity for accommodation development – Lee Valley Regional Park, where accommodation development can support the development of the Park as a destination for outdoor activities, relaxation and recreation, and Epping Forest, where accommodation provision could play a role in generating an income to support Forest management.
- Some barriers to hotel and visitor accommodation development in the District in terms of:
  - The sites challenge for budget hotel companies;
  - Green Belt restrictions on new-build development;
  - The restrictions on development in Epping Forest.

The Phase 2 Objectives

The Phase 1 work informed the wording of Draft Policy E 4 (covering the Visitor Economy) in the Consultation Draft of the Local Plan.

The objectives of Phase 2 of the study were to undertake more detailed research and assessments to advise on:

- The need to allocate hotel sites in the south of the District in the Local Plan;
- The need for more explicit policies for accommodation development in the Lee Valley Regional Park and Epping Forest;
- How to strengthen the accommodation retention policy;
- Other District Council interventions to accelerate hotel and visitor accommodation development in the District.

The Phase 2 Findings

The Phase 2 work has:

- Shown strong demand for hotel and visitor accommodation in the District from a range of visitor markets that are staying for specific purposes, including business visitors, contractors working of construction and infrastructure projects, people attending weddings and family parties, those visiting friends and relatives, UK and overseas tourists visiting London, people attending a sporting event, youth groups coming to stay at the outdoor activity centres in the District, and those looking to get away from it all for a self-catering, caravanning or camping break.

- Demonstrated clear interest from hotel and visitor accommodation developers and operators in being represented across the district, but challenges to realising new accommodation development in terms of site availability and deliverability and planning constraint.

- Confirmed the need to upgrade the existing hotels in Epping, but shown no signs of the the current owners being interested in doing this.

- Evidenced the need for additional budget hotel provision in the south of the District, demonstrated by the strong performance of the District's existing budget hotels, the levels of business that they consistently turn away, and the interest from Premier Inn and Travelodge, and other international hotel companies in opening budget/ limited service hotels in these parts of the District.

- Confirmed the challenges that budget hotel companies are facing in competing for sites with higher value uses, in particular residential.

- Identified potential for hotel development in Harlow, which could potentially come forward on sites in Epping Forest District that border onto Harlow.

- Confirmed the potential for the development of a wide range of other forms of visitor accommodation across the rural parts of the District, including glamping, touring caravan and camping sites, holiday lodges, youth and group accommodation, pub accommodation, restaurants with rooms, hotels on golf courses, and accommodation at wedding venues, amongst other types of rural accommodation.

- Affirmed the Lee Valley Regional Park as a key location of opportunity for visitor accommodation development, with the development of the Lee Valley White Water Centre as a major leisure destination set to provide a catalyst for accommodation development on adjacent and linked sites and the surrounding areas in Epping Forest District.

- Shown a need for a senstive approach to the provision of visitor accommodation in Epping Forest, where only small-scale, low impact accommodation provision can be considered.

Despite the strength of the visitor accommodation market in Epping Forest District and the clear interest from accommodation developers and operators in developing here, the constraints in terms of planning and site availability combined with intense pressure for development from higher value uses makes delivery a challenge. Positive interventions by the Council and its partners are needed to support and accelerate visitor accommodation development and achieve the growth of the visitor economy sought. This provides the rationale for the recommendations that follow.

The Implications for Finalising the Local Plan

In terms of the implications of the Phase 2 work for finalising the wording of Policy E 4 in the new Local Plan our findings show:

- A case for broadening the locations where new hotels can be considered to include employment sites where hotels can act as an ancillary use.

- A need to allocate deliverable sites for hotel development in the south of the District to address the market failure of budget hotel companies being unable to compete for sites with residential and other higher value uses to deliver the new budget hotels that the research shows a need for. We have identified the strongest hotel sites in the key locations of Epping, Waltham Abbey and Debden for the Council to further assess in terms of the potential to allocate them for hotel development. From ongoing liaison with Planning Policy however, we understand that this will be difficult to achieve considering the many competing demands for limited land, particularly in the south of the district.

- A case for a specific supportive reference to the development of the Lee Valley White Water Centre as a major leisure destination, in line with the policy approach that Broxbourne Council has taken.

- No need for an explicit policy for accommodation provision in Epping Forest, recognising the highly sensitive nature of this part of the District.

- A case for strengthening the accommodation retention policy with guidance on the evidence that applicants must submit to demonstrate that there is no market interest in acquistion and investment.

- A case for specific references to visitor accommodation in the countryside that does not require permanent buildings or the re-use of existing buildings, e.g. glamping, touring caravan and camping sites, camping pods, and appropriate new-build accommodation. e.g. holiday lodges, golf lodges, fishing lodges, treehouses.

Potential District Council Interventions to Accelerate Hotel & Visitor Accommodation Development

In terms of other District Council interventions to accelerate hotel and visitor accommodation, we have suggested the following:

- Intervention to secure new budget hotels as the owner of some of the strongest hotel sites that we identified in the District; as a potential investor to generate an income for the Council; and through influencing masterplans and development briefs for key mixed-use sites.

- Raising awareness of the hotel and visitor accommodation development opportunities that the Visitor Accommodation Needs Assessment has identified, through effective dissemination of the research findings to all interested parties.

- Proactive follow up and support for accommodation businesses, land and property owners, and hotel and visitor accommodation developers interested in visitor accommodation development.

- Working with Vibrant Partnerships to capitalise on the opportunities for the surrounding sites and areas of the District from its planned development of the Lee Valley White Water Centre as a major leisure destination.

- Encouraging and supporting the Lee Valley Regional Park Authority and Vibrant Partnerships in undertaking more detailed work to develop a strategy for visitor accommodation development in the Lee Valley Regional Park.

- Supporting the City of London Corporation in progressing more detailed work that may be required to assess specific accommodation development opportunities in and around Epping Forest.

- Developing a joined-up approach to hotel development in and around Harlow, with Harlow Council and East Hertfordshire District Council.

- Initiatives to grow the District's accommodation market in terms of:
  - Growing corporate demand by encouraging and supporting the development of business parks, offices and employment sites, and attracting companies to them that will have requirements for hotel accommodation;
  - Working with Vibrant Partnerships and hotels and accommodation businesses in the south of the District to develop and promote white water leisure break and and leisure and corporate group packages with the Lee Valley White Water Centre;
  - Attracting, developing, supporting and promoting events and festivals that wiill have the pulling power to attract audiences from further afield that will require overnight accommodation;
  - Working with the District's wedding venues to atttract weddings;
  - Encouraging exploration of the District by the visitors that come to stay for different purposes, through good quality in-accommodation destination print and digital visitor information, and familiarisation visits and training for frontline accommodation staff so that they can advise visitors on what there is to see and do in the District.

Moving Forward – Feeding into the Visitor Economy Strategy

In terms of acting on these suggestions for District Council intervention to accelerate hotel and visitor accommodation development in the District, we envisage that the District Council will carry those actions that it wishes to implement across into the new Visitor Economy Strategy and the associated implementation action plan that it is in the process of producing for the District. We do not see a need for a separate Hotel & Visitor Accommodation Development Acceleration Plan for the District. The Visitor Economy Strategy and the positive planning policy approach in the new Local Plan should be sufficient.

1. INTRODUCTION

1.1 Background

The Purposes of the Study

1.1.1 Hotel Solutions was commissioned by Epping Forest District Council in July 2016 to undertake a Visitor Accommodation Needs Assessment for Epping Forest District. The need for the study was identified on the back of an agreed strategic Council objective to grow the visitor economy and a recognition that to do so requires the delivery of new visitor accommodation.

The purposes of the study are:

- To provide a clear understanding of the future potential for hotel and visitor accommodation development in Epping Forest District;
- To inform planning policy for visitor accommodation development as part of the new Local Plan;
- To advise on other roles that Epping Forest District Council can play to accelerate hotel and visitor accommodation development in the District.

Phase 1

1.1.2 The study has been conducted in 2 phases, driven by timing in relation to the production of the Local Plan Consultation Draft, for which a draft policy relating to visitor accommodation was required. Phase 1 of the study completed in August 2016, and comprised the following modules of work which together formed an evidence base for the District Council's planning policy approach to hotel and visitor accommodation development as part of the Draft Policy E 4 on The Visitor Economy in the October 2016 Local Plan Consultation Draft:

- An audit of current visitor accommodation supply in the District;
- A review of past and current proposals for visitor accommodation;
- A review of national trends in hotel and visitor accommodation development;
- Consultations with Lee Valley Regional Park Authority, Vibrant Partnerships and City of London (Epping Forest);

- Consultation workshops with District Council Officers and Members;
- A review of examples of tourist accommodation planning policies.

1.1.3 The Phase 1 research raised a number of issues in terms of:

- The need to improve existing low-quality hotels;
- Strong market potential for additional budget hotels in the south of the District;
- Potential for a wide range of visitor accommodation offers in the rural parts of the District;
- Two key locations of opportunity for accommodation development – Lee Valley Regional Park and around Epping Forest;
- Some barriers to hotel and visitor accommodation development, most notably:
  - The lack of budget hotel sites in the south of the District – and strong competition from higher value uses;
  - Green Belt restrictions on new-build development;
  - The restrictions on development in Epping Forest.

Phase 2

1.1.4 These issues have informed the second phase of work, which has sought to advise on:

- The need to allocate hotel sites in the south of the District;
- The need for more explicit planning policies for accommodation development in Lee Valley Regional Park and Epping Forest;
- How to strengthen the accommodation retention policy;
- Other District Council interventions to support and accelerate hotel and visitor accommodation development in the District, in line with the identified market potential and emerging planning policy approach.

1.2 Phase 2 Methodology

1.2.1 The work programme for Phase 2 has involved the following strands of research:

- A hotel and visitor accommodation manager/owner survey to understand current performance and markets in more detail, future development plans and barriers to investment. A list of the hotels and visitor accommodation businesses that were interviewed is provided at Appendix 2.
- Consultations with demand drivers for hotels and other forms of visitor accommodation, including visitor attractions, event venues, wedding venues and golf courses (listed at Appendix 3).
- Consultations with budget hotel companies in terms of their requirements for sites in the south of the District (Epping, Loughton, Debden, Buckhurst Hill, Chigwell, Waltham Abbey), any difficulties they are facing in securing sites, and their views on how public-sector partners and planning policy could help to address such problems.
- An assessment of potential hotel sites in the south of the District in terms of their suitability for budget hotel development – drawn from a combination of employment and residential sites put forward for allocation, Council sites that could come forward for development, and a site spotting exercise that we undertook, essentially playing the role of a site finder for a budget hotel operator.
- Consultations with previous Hotel Solutions local authority clients where the hotel sites challenge has also been an issue to explore the value and efficacy of the site allocation route.
- Meetings with Vibrant Partnerships/ Lee Valley Regional Park Authority and Corporation of London to explore their aspirations in terms of visitor accommodation development, the degree to which the draft Local Plan visitor accommodation policy could permit these to be delivered, and the need for any additional policies to support the implementation of these development plans.
- Follow up work on the accommodation development proposals identified in Phase 1 to determine which had been or were intended to be implemented, and which had fallen by the wayside and why.

- A telephone survey of hotel and visitor accommodation developers to test their potential interest in developing and operating visitor accommodation in Epping Forest District, by type and location, their view of the market, and any barriers they have identified to progressing development projects in the District.

1.3 Reporting Structure

1.3.1. This document presents the key findings of our research in a succinct report that synthesises the key messages from the work modules set out above, culminating in our conclusions regarding the requirements and opportunities for visitor accommodation development across Epping Forest District; our assessment of the suitability of Draft Policy E 4 in terms of capitalising on the identified opportunities; and our recommendations for forward public sector action to support and accelerate hotel and visitor accommodation development in the District.

1.3.2. The findings of the site assessments strand of work are included at Appendix 5.

2. CURRENT ACCOMMODATION PERFORMANCE & MARKETS

2.1. Methodology

2.1.1 Information on current hotel and visitor accommodation performance and markets was gathered through face-to-face and telephone interviews with the managers and owners of 34 hotels and visitor accommodation businesses in Epping Forest District and immediate surrounding areas (listed at Appendix 2). This includes budget and 3/4 star hotels in the District and surrounding locations; hotels in Harlow, inns and pub accommodation businesses; B&Bs; self-catering properties; the holiday lodge park and leisure moorings at Roydon Marina; touring caravan and camping sites in the District and neighbouring parts of the Lee Valley Regional Park; and group and youth accommodation establishments. Interviews were also conducted with visitor attractions, wedding venues and golf courses in the District, to understand the extent to which they generate leisure demand for hotels and visitor accommodation. The key findings of these surveys are summarised in the following paragraphs.

2.2. Serviced Accommodation Performance

Budget Hotels

2.2.1 Budget hotels in the south of Epping Forest District (at Chigwell, Buckhurst Hill and Waltham Abbey) and surrounding locations to the south (Chingford and Enfield) are currently trading at very high room occupancies (just over 85% in 2016), as well as high achieved room rates that are considerably above national averages of c. 80% occupancy and £50-£55 achieved room rate.

EPPING FOREST DISTRICT (SOUTH)
BUDGET HOTEL PERFORMANCE 2016

Average Annual Room Occupancy %	Average Annual Achieved Room Rate[1] £
86.5	60.40

Source: Hotel Solutions

Sample: Travelodge Chigwell, Premier Inn Loughton/Buckhurst Hill, Premier Inn Waltham Abbey, Premier Inn Chingford Holiday Inn Express Chingford, Premier Inn Enfield

Notes:
1. The amount of rooms revenue (excluding food and beverage income) that hotels achieve per occupied room net of VAT, breakfast (if included) and discounts and commission charges.

2.2.2. The District's budget hotels achieve very high midweek occupancies (frequently over 90%) and consistently fill and turn business away, particularly on Tuesday and Wednesday nights, when some budget hotels could easily fill again. Saturday occupancies are also very high: all budget hotels consistently fill and deny substantial business on this night also. Friday occupancies are similarly strong, with budget hotels frequently filling and turning Friday business down, especially during the summer months. Sundays are the only quieter night for the District's budget hotels, when they are generally about half full. Sunday occupancies are stronger during the summer, and budget hotels can sometimes fill on Sunday nights at this time of year. Budget hotel occupancies are a little lower in January and February, but are otherwise consistently very strong for the rest of the year.

EPPING FOREST DISTRICT (SOUTH) BUDGET HOTELS
WEEKDAY & WEEKEND OCCUPANCIES – 2016

Typical Room Occupancy %			
Mon-Thurs	Friday	Saturday	Sunday
88	85	93	56

Source: Hotel Solutions

2.2.3. Occupancies dropped for one of the District's budget hotels in 2016 as a result of the opening of a new Premier Inn in Ware. They have quickly recovered in 2017 however.

3/4 Star Hotels

2.2.4. 3/4 star hotel performance in Epping Forest District and the areas immediately to the south is relatively weak: average annual room occupancies and achieved room rates for these 3/4 star hotels are significantly below national and county averages. Most hotels are trading at annual room occupancies of 60-70%. The Marriott Waltham Abbey, as a 4 star hotel, trades at higher levels of occupancy and room rate than the 3 star hotels in the District and surrounding area. 3 star hotels are trading at similar achieved room rates to the District's budget hotels. In some cases, this is a reflection of their quality. For one hotel, it is also a function of the number of single bedrooms that it has.

EPPING FOREST DISTRICT & IMMEDIATE SURROUNDING AREAS
3/4 STAR HOTEL PERFORMANCE 2016

	Average Annual Room Occupancy %	Average Annual Achieved Room Rate £
UK Provincial 3/4 Star Chain Hotels[1]	**75.6**	**83.22**
Essex 3/4 Star Hotels[2]	**73.8**	**72.73**
Epping Forest District 3/4 Star Hotels	68.4	67.44

Source: Hotel Solutions

Sample: Marriott Waltham Abbey, Mulberry House, Best Western Plus Epping Forest, Hallmark Chigwell, Roydon Marina Hotel

2.2.5. Tuesday and Wednesday night occupancies are generally strong for 3 and 4 star hotels, most of which generally fill and turn business away on these nights, particularly in key corporate months (March, April, May, September, October and November). Monday, and especially Thursday night occupancies are lower, and hotels generally have availability on these nights. Saturday occupancies are strong all year, with 3/4 star hotels generally filling and turning business away, particularly in the summer. Friday occupancies are lower, although can be stronger in the summer. Sunday occupancies are low all year. Occupancies have reduced for some of the 3 and 4 star hotels in the south of the District as they are no longer getting business from events at the London Olympic Park since the opening of new hotels at Stratford.

2.2.6. The Phoenix Epping Hotel at North Weald (formerly the Travelodge Harlow North Weald) closed in 2017. It had become very run down and was receiving poor Tripadvisor reviews. The hotel had never traded well, even as a Travelodge, because of its location. The Bell Hotel in Epping has been granted planning permission for partial demolition and the development of a care home. From Tripadvisor reviews for the hotel there appear to be some issues with its quality. We suspect that it may not be trading to its full potential therefore, given lack of investment and effective marketing and management.

Harlow Hotels

2.2.7. Hotel room occupancies are high in Harlow, but achieved room rates are low due to the quality of the town's 3 star hotels and the dominance of budget hotels' in Harlow's hotel supply.

HARLOW HOTEL PERFORMANCE 2016

Average Annual Room Occupancy %	Average Annual Achieved Room Rate £
79.6	55.54

Source: Hotel Solutions

Sample: Travelodge Harlow, Premier Inn Harlow, Holiday Inn Express Harlow, Park Inn Harlow

2.2.8. Harlow hotels are consistently filling and turning significant business away during the week and on Friday, and especially Saturday nights.

2.2.9. Midweek demand for hotel accommodation in Harlow has grown with the development of the Harlow Enterprise Zone and the Kao Park office park, and looks set to grow further with the development of the Harlow Science Park and the Public Health England Science Hub. PHE estimates that the Science Hub will attract around 200 internal and external visitors per week, but it is not able to say how many of them will stay overnight. As a public sector body PHE is required to use an agency to book hotel accommodation, and has an upper price limit, currently of £100 per night.

2.2.10. Evidence from the survey of Harlow companies that Hotel Solutions completed in May 2017 as part of the Essex Corporate Hotel & Conferencing Facilities Study for Essex County Council clearly showed that international companies in the town are using the international 4 star hotels at Stansted Airport and Waltham Abbey because of the lack of this quality of hotel in Harlow.

Inns & Pub Accommodation

2.2.11. All of the inns and pub accommodation businesses that we spoke to in Epping Forest District reported high midweek occupancies and occasional midweek denials, when they are trading at full occupancy. Weekend occupancies are more seasonal. They are stronger in the summer months, particularly on Saturday nights, when inns and pub accommodation businesses are frequently full and turn business away. Friday and Sunday occupancies are lower, particularly in the winter.

B&Bs

2.2.12. Epping Forest District has a very limited supply of B&Bs. The two B&B operators that we spoke to in the District indicated that they are as busy as they want to be: neither of them are particularly hungry for business. Both operators indicated that they could be busier if they increased their marketing. As lifestyle businesses, this is quite typical of B&Bs. Both operators indicated that they were busiest at weekends during the summer, catering for wedding parties.

2.3 Serviced Accommodation Markets

Midweek Markets

2.3.1. Our survey of serviced accommodation businesses in Epping Forest District provides the following insight into their midweek markets:

- Budget hotels in and around the District, and in Harlow, attract a mix of corporate and contractor business during the week.
- The corporate market is the main source of midweek business for 3 and 4 star hotels. Contractors are also a midweek market for a number of 3 star hotels.
- Inns and B&Bs attract a mix of business visitors and contractors in the week.
- Corporate demand for accommodation in the District is a mix of demand from local companies, transient business travellers using the M25, M11 and Stansted Airport, and business people commuting into London. Hotels also attract some corporate business from surrounding areas, including Chelmsford, Woodford, Enfield, Harlow, Hoddesdon and Romford. Corporate demand is not particularly strong from Epping Forest District companies. We found some evidence of hotels in Woodford catering for corporate demand from Loughton companies.
- International companies in Harlow currently use the Marriott Waltham Abbey, Down Hall and Radisson Blu and Novotel hotels at Stansted Airport, as Harlow does not have any such 4 star hotels.
- Residential conferences are a further, relatively small midweek market for some 3 and 4 star hotels, but a key midweek market for Down Hall, as a luxury country house hotel with extensive conference facilities. One hotel reported a reduction in this market in recent years.
- Some 3 and 4 star hotels in and around the District take UK and overseas group tours during the week that use them as a base for visiting London, Cambridge and Oxford. This is low-rated business that hotels take in the absence of demand from other higher-paying markets. They primarily use this market to boost midweek occupancies in the summer months when corporate demand reduces.

- Midweek weddings and funerals also generate some demand for hotels, inns and B&Bs.

- Overseas tourists visiting London and Cambridge are a further, minor midweek market.

- One hotel is working with the Lee Valley White Water Centre to develop corporate team building business.

Weekend Markets

2.3.2. Our survey of serviced accommodation businesses provides the following insight into their weekend markets:

- Demand from people attending weddings and other family occasions is the primary source of weekend business for hotels, inns and B&Bs in and around the District. The District has a strong and growing weddings market, with a number of high quality wedding venues, including Gaynes Park, Kings Oak, Blake Hall, Chigwell Hall, Woolston Manor Golf & Country Club and Down Hall, which generate substantial weekend demand for accommodation. Weddings business frequently blocks hotels, inns and B&Bs out to other weekend markets.

- Other strong weekend markets are people visiting friends and relatives (the VFR market), and UK and overseas tourists using hotels, inns and B&Bs in the District as a base for commuting into London and visiting Cambridge. London tourists are a key market for the District's budget hotels, which are in easy reach of tube stations for commuting into London.

- Minor weekend markets are:

  - People attending events at the Lee Valley White Water Centre e.g. the ICF Canoe Slalom World Championships in 2015;
  - Tottenham Hotspur Football supporters and teams;
  - People attending events at the Olympic Park in Stratford;

  - Demand from other events, including:
    - Special events at Epping Ongar Railway occasionally generate some demand for accommodation;
    - Nuclear Races events at Kelvedon Hatch periodically generate some demand for B&B accommodation;
    - V Festival, Chelmsford;
    - Cricket matches at Chelmsford;
    - One Love Festival at Hainaut Park (which has moved to Tunbridge Wells in 2017);
    - Chelsea Flower Show.
  - Clubbers, stag and hen parties and TOWIE groups coming for nights out in Brentwood, Chigwell, Chingford and Epping;
  - Air passengers flying from Stansted Airport – for the inns in the north of the District and the budget hotels in Harlow;
  - Walking groups on the Essex Way – for two B&Bs;
  - Golfing tournaments at some of the District's golf courses occasionally generate demand for accommodation.

- The Lee Valley White Water Centre is in discussions with the Waltham Abbey Marriott Hotel about promoting white water weekend break packages. Vibrant Partnerships is keen to develop similar packages with other accommodation businesses. It has appointed an Accommodation Manager to work on this.

- From our discussions with the District's hotel managers and inn and B&B operators it would appear that their leisure guests are not staying in Epping Forest District for any aspects of its leisure tourism offer: they are visiting for a specific event or purpose, or using accommodation in the District as a base for visiting London and Cambridge.

- A lot of the weekend demand that hotels attract is price-driven through online travel agents (OTAs) like booking.com and LateRooms, deal sites like Travelzoo and Groupon, and third-party websites such as Superbreaks.

2.4. Non-Serviced Accommodation Performance & Markets

Self-Catering Accommodation

2.4.1. Epping Forest District has very few self-catering properties. The smaller properties in the District are achieving high occupancies throughout the year. Demand is primarily for one and two-week lets, and sometimes longer lets, primarily to contractors working in the area and expats visiting their friends and relatives. UK and overseas tourists using self-catering accommodation in the District as a base for visiting London are a minor market. Self-catering properties in the District also attract some demand from people that require temporary accommodation while work is being done on their house, or while they are in the process of relocating to the area.

2.4.2. One of the large 'super cottage' self-catering properties in the District attracts strong weekend demand for family and friend get togethers, celebration weekends, and hen parties (coming for the 'TOWIE' experience). It is continually booked up at weekends and consistently has to turn groups away at these times, but attracts very little midweek demand. Another large 'super cottage' in the District reported attracting very few bookings however.

Holiday Lodge Rental

2.4.3. The rented holiday lodges at Roydon Marina Village are achieving very high levels of occupancy through demand for short breaks from a relatively local market that wants to get away from it all for a few days. They also attract some demand for group bookings for family get togethers and parties.

Holiday Lodge Ownership

2.4.4. There is strong demand for holiday home ownership at Roydon Marina Village, particularly as an investment purchase, with the Village offering a letting service to enable owners to generate an income from their investment, alongside their own periodic use of their lodge.

Leisure Moorings

2.4.5. Roydon Marina's leisure moorings are fully let and the Marina is consistently turning away enquiries for wide beam boats, which are growing in popularity.

Touring Caravan & Camping Sites

2.4.6. The Lee Valley touring caravan and camping sites and Debden House campsite trade strongly at weekends and during July and August, when they are frequently fully booked and having to turn business away. Midweek occupancies are lower outside of school holiday periods. The sites attract strong demand from a relatively local market that is looking to escape from London or get away from it all for a few days in their caravan or to camp. Caravanners and campers also come for walking and cycling in the Lee Valley. The other key market is overseas tourists, using the Lee Valley caravan and camping sites and Debden House campsite as a base for visiting London. Contractors commuting into London are a winter market.

Camping Pods and Wigwams

2.4.7. There is strong weekend and summer demand for the camping pods and wigwams on the Lee Valley caravan and camping sites: they are usually fully booked and have to turn business away at these times.

Group & Youth Accommodation

2.4.8. The youth group and outdoor education centres in Epping Forest District, and YHA hostel in the Lee Valley are consistently fully booked at weekends throughout the year, and having to turn business away. Key weekend markets are scout and guide groups, Duke of Edinburgh Award groups, The Prince's Trust groups, faith groups, youth groups and charity groups. Midweek demand is not as strong, particularly in the winter. Key midweek markets are school groups, college groups, sports teams, and English language school groups and family groups in the summer. Groups generally stay on site at the centres for the duration of their stay. Some will undertake outdoor activities in the Lee Valley Regional Park. Some will go into London.

2.4.9. As the headquarters of the Scout Association, the Gilwell Park Scout Activity Centre attracts Scout groups from all over the UK and around the world. The other group and youth accommodation centres in the District primarily attract groups from North London, Essex and other surrounding areas.

2.4.10. The District's youth group and outdoor education centres indicated that they would like to reconfigure their accommodation offer to include more modern, environmentally sustainable accommodation units, camping pods and improved camping facilities.

2.5. Summary – Key Messages

2.5.1. In summary, our research and analysis shows the following:

- Strong demand for, and frequent shortages of, budget hotel accommodation in the south of the District.
- Weaker demand for full-service 3/4 star hotel accommodation in the District, and only occasional shortages at this level in the market.
- A strong hotel market in Harlow, which existing hotels here are not fully satisfying.
- Good demand for inn/pub and B&B accommodation, albeit that the current supply of these forms of serviced accommodation is limited;
- Evidence of a market for self-catering cottage and holiday lodge rental and ownership. Although again a limited supply of such accommodation currently.
- Clear shortages of provision for touring caravanning and camping at weekends and in the summer.
- Strong demand for camping pods and wigwams in the Lee Valley.
- A group and youth accommodation sector that is trading well and consistently turning business away at weekends throughout the year.

3. POTENTIAL GROWTH IN ACCOMMODATION DEMAND

3.1. Likely Drivers of Growth in Accommodation Demand

3.1.1. The Phase 1 report included a headline assessment of the prospects for future growth in demand for hotel and visitor accommodation in Epping Forest District, based on a review of national tourism market trends and forecasts and their relevance to the District and an initial assessment of potential growth drivers in and around the District. From the further research that we have undertaken as part of Phase 2, we have identified the following as the most likely drivers of future growth in demand for hotel and visitor accommodation in the District:

- The planned employment growth and development of the District's economy should boost corporate demand for hotel accommodation and other forms of serviced accommodation. The draft Spatial Development Strategy (2011-2033) for the District (articulated as Draft Policy SP 2 in the Draft Local Plan) seeks to create 10,000 new jobs in the District over the Plan period, through the enhancement and expansion of existing employment sites and the allocation of new employment land.

- The growth of Harlow's economy, in terms of the development of the Harlow Enterprise Zone and Harlow Science Park (which could create 2,500-5,000 new jobs and attract 100 companies) and Public Health England's Science Hub (projected to create 2,750-3,200 new jobs) should provide a significant boost to corporate demand for hotel accommodation in and around Harlow. This should support new hotel development here, given the current strong hotel performance already in the town. The key question is where new hotels are best located to serve the new corporate demand and support the development and regeneration of Harlow.

- Construction and infrastructure projects, including the new M11 J7A and the Harlow employment developments, are likely to create new demand for budget hotel accommodation from contractors working on them.

- Population growth in the District and surrounding parts of Essex, Hertfordshire and North London[1] and the planned Harlow and Gilston Garden Town, is likely to generate increased demand from people attending weddings and family parties, and visiting friends and relatives. It should also increase demand from local caravanners and campers and those looking to get away from it all for a few days to spend time in the countryside relaxing, walking, cycling or undertaking other outdoor activities.

- The projected growth in inbound tourism to the UK[2] and enduring appeal of London and Cambridge as key draws for overseas visitors should strengthen the demand from overseas tourists using accommodation in Epping Forest District as a base for visiting these destinations.

- The projected growth in domestic tourism[3] and strength of London as a destination should also strengthen the demand from UK tourists using accommodation in the District as a base for commuting into London.

- The proposed development of the Lee Valley White Water Centre as a major leisure destination should provide a significant boost to accommodation demand in the neighbouring parts of Epping Forest District and a stimulus to accommodation development in the Lee Valley Regional Park and adjacent locations in the District. The Economic Development Study undertaken for the White Water Centre in June 2011 by Nathaniel Lichfield & Partners identified significant opportunities for the development of a range of adrenaline sports and family leisure activities at the White Water Centre and adjoining and nearby sites in the Lee Valley Regional Park, including the Showground site, Royal Gunpowder Mills site and Gunpowder Park in Epping Forest District. The study concluded that the area has the potential to become a major leisure destination and activity zone that could attract significant numbers of visitors who will also have requirements for ancillary facilities such as cafes and restaurants, sports retail and

[1] The population of West Essex (Epping Forest, Harlow and Uttlesford Districts) and East Hertfordshire is projected to increase from 425,000 in 2011 to 490,000 by 2033. The population of the London Borough of Redbridge is forecast to grow from 297,000 in 2015 to 362,000 by 2030, and the population of the London Borough of Enfield is projected to rise from 325,000 in 2015 to 358,000 by 2032.
[2] Inbound tourism to the UK is predicted to grow by 6% p.a. through to 2025 (Source: Tourism: Jobs and Growth – Deloitte, November 2013). Overseas tourist visits to the UK grew by 5% p.a. between 2012 and 2015. Growth slowed to 1.6% in 2016. VisitBritain is projecting a 4% increase in 2017
[3] Domestic tourism in the UK is forecast to grow at 3% p.a. through until 2025 (Source: Tourism: Jobs and Growth – Deloitte, November 2013)

overnight accommodation. The Authority will shortly commission a masterplan for the White Water Centre and the surrounding area to support its development as a major leisure destination. The Authority's leisure trust, Vibrant Partnerships, has appointed an Accommodation Manager whose role will include working with local accommodation businesses to develop short break packages with the White Water Centre. Major watersports events are also likely to generate significant demand for accommodation. The White Water Centre is bidding to host the 2019 ICF Canoe Slalom World Cup and the 2020 ECA Canoe Slalom European Championships.

- The projected increase in air passenger movements through Stansted Airport, from 24m per year to 35m over the next 10 years, and beyond this to 40-45m, will significantly boost hotel demand from air passengers and aircrew, potentially creating stronger demand for accommodation in the north of Epping Forest District. New hotel development at the airport is however likely to soak up much of the new demand, lessening these opportunities therefore.

4. INTEREST IN HOTEL & VISITOR ACCOMMODATION DEVELOPMENT

4.1. Hotel & Visitor Accommodation Development Proposals

4.1.1 Intelligence about visitor accommodation development proposals has been gathered from a number of sources:

- Records from the District Council's planning register;
- Feedback from the existing visitor accommodation businesses that we interviewed;
- Feedback from the hotel and visitor accommodation developer consultees;
- Interest expressed by other stakeholders.

4.1.2. An initial list of proposals was pulled together in Phase 1 in August 2016 which was used as a starting point and supplemented from the above sources. The table overleaf summarises schemes that have come forward via the planning system. We have also identified a number of proposals at a pre-application stage, but have not included them in the table as they are not yet in the public domain. The table includes some proposals of scale, notably the PGL children's activity holiday centre proposal for Royal Gunpowder Mills (900 bedspaces), and an application for a 240 berth extension to Roydon Marina. Smaller scale proposals include bedroom extensions to pubs (up to 10 rooms), small scale caravan and camping site applications (15+ pitches), interest in camping pods and glamping units, and the up-grading of accommodation units at a Christian retreat and holiday centre (Woodland Camp). In terms of hotels, schemes have included a partial change of use (Bell Hotel), a proposal to redevelop and extend an existing hotel (Mulberry House), a Premier Inn extension (Waltham Abbey), and permission for a new build hotel (43 rooms) at Waltham Abbey. A hotel is also proposed as part of the St John's Rd Area scheme in Epping and we have identified interest from a budget hotel operator in a site in Debden, although have not included it on the table as the interest is only at a pre-application stage.

4.1.4. Both of the major schemes quoted above have been refused. The grounds quoted for the refusal of the PGL scheme included the scale of new build development in the Green Belt being inappropriate, harm to heritage assets, and failure to demonstrate need. The decision was against Officer recommendation for approval, and resulted in an appeal, although this was subsequently withdrawn. In the case of Roydon Marina, inappropriate development in the Green Belt was again cited alongside concerns about increased traffic, pedestrian safety, the loss of attractive water area, and impact on the character and visual amenity of the area.

4.1.5. Green Belt clearly is a constraint around which the issues of potential harm and very special circumstances must be evidenced to decide the appropriateness of any scheme. However EFDC has granted permission for other proposals in Green Belt, including most recently for a glamping development at Norton Field Farm, albeit that this is a very small scale project.

4.1.6. However, even where permission has been granted, schemes have not necessarily been implemented, and some have lapsed. Feedback from stakeholders seems to indicate that there have been a number of site specific or business-specific factors behind some of these projects not moving forward, and in some cases a continued interest in future development when the circumstances are right.

4.1.7. In addition to these individual operator and site proposals for visitor accommodation development, the managers of two of the key locations of opportunity for accommodation provision in the District – Lee Valley Regional Park (Lee Valley Regional Park Authority and Vibrant Partnerships) and Epping Forest (Corporation of London) have a combination of plans, proposals and aspirations for the future development of the visitor economy that could include visitor accommodation development. We discuss these below. Whilst these are at very different stages of being worked up, it is important to understand what might come forward in the future, to inform emerging planning policy and visitor economy strategy development.

VISITOR ACCOMMODATION DEVELOPMENT PROPOSALS

SITE	Location	Development/Proposal	Status
Proposals			
Hotel			
The Bell Hotel	Epping	2011 approval for partial demolition and extension for a care home	Not implemented
Premier Inn Waltham Abbey	Waltham Abbey	34-bedroom extension granted planning permission June 2015	Not implemented
Mulberry House	High Ongar	Demolition of 17 chalet rooms and replacement with 25 bedrooms, meeting room, gym, dining room and kitchen approved 2013	Not implemented. Permission lapsed but still interested in expanding in line with growing weddings market.
Skillet Hill	Waltham Abbey	Erection of 43 room hotel with restaurant and petrol station alongside extension to lorry park. Approved 2013.	Subject to legal agreement, not implemented. Potential future interest but likely to need permission for a larger hotel to meet operator requirements, and Green Belt and traffic/parking issues around this.
St John's Rd Area	Epping	Mixed use scheme/development brief – original scheme includes a hotel	Given time lapsed developer is likely to be going back out to the market to re-test interest in various uses

Pub Accommodation			
John Barleycorn	Thresher's Bush, Harlow	10-bedroom extension to pub, 2015. Withdrawn.	Site specific issues to do with positioning of building, skyline and trees.
Kings Inn Hotel	Ongar	Two storey detached building to provide 10 en suite bedrooms, granted 2010.	Taken over by Oakman Inns; bedroom element of scheme not implemented. Land required for parking.
Camping & Caravanning/ Glamping			
Morgans Farm	Norton Heath	Approval for 6 camping huts around a lake associated with fishing, tennis, ancillary retail and club facilities, approved 2013. Details approved 2016.	Status unknown
Mossford Green Nursery	Theydon Bois	Change of use to permit 15 motorhomes, tents or caravan pitches granted 2014	Listed on UKCampsite as member only Camping and Caravanning Club certificated site
Norton Field Farm	High Ongar	Change of use of agricultural land to touring caravan and camping site, operating April to October – 10 touring caravan pitches, 10 shepherds huts and 11 tent/yurt pitches, plus toilet/shower facilities, granted 2017	Status unknown

Group & Youth Accommodation			
Royal Gunpowder Mills	Waltham Abbey	Proposal for a PGL children's activity holiday centre (capacity 900+). Refused on the grounds of inappropriate development in Green Belt, harm to heritage assets, and failure to demonstrate need. Appeal withdrawn	Possibility of a smaller scheme being worked up.
Woodland Camp	Lambourne	Replacement of mobile homes with 42 purpose designed cabins, approved 2017	Status unknown
Marina			
Roydon Marina Village	Roydon	240 berth extension and associated parking/facilities, refused 2016 on grounds of traffic, impact on visual amenity and inappropriate development in Green Belt	Additional concerns around residential use of existing berths.

4.2. Proposals & Aspirations for Visitor Accommodation Provision in Lee Valley Regional Park

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4.2.1. One of the strategic aims of the Lee Valley Regional Park Development Framework is to develop the Park as a high quality and regionally unique visitor destination. Developing the Park's accommodation offer is seen as an important part of achieving this aim. The Park Authority would like to develop accommodation in a number of locations, with each providing a mix of different types of accommodation, including hotels, hostels, holiday villages, touring caravan and camping sites, mobile home parks and recreational moorings. Key sites within or bordering Epping Forest District that are identified in the Park Development Framework as offering potential for accommodation development are the Lee Valley Campsite at Sewardstone (for expansion and enhancement); Lee Valley Country Park; land at and adjacent to the Lee Valley White Water Centre; Waltham Abbey and Roydon Marina Village.

4.2.2. Vibrant Partnerships already operates a number of visitor accommodation sites in the Regional Park, and has the expertise to develop and operate further sites, but could also consider partnership working. Since the Park Development Framework was prepared, more detailed proposals have been developed for individual sites. The strategy seeks to create destination clusters with appeal to more than the day visitor so that visitors need to stay overnight and spend more. The Lee Valley White Water Centre has a key part to play in this strategy. Vibrant Partnerships is looking to draw up a masterplan to develop the Centre as a major leisure destination offering a range of adrenaline sports and family activities, with the potential to attract up to 1 million visitors per annum. Accommodation will also be a key part of creating this destination. Whilst much of this development will sit on land in Broxbourne, associated land in Epping Forest District, including the Showground site and Royal Gunpowder Mills site may also be included in a wider scheme designed to create the site as a leisure destination. Vibrant Partnerships considers that other locations around the Park in the District such as Holyfield Hall farm and Fishers Green may present other opportunities for leisure based development.

4.3 Proposals & Aspirations for Visitor Accommodation Provision around Epping Forest

4.3.1. The other key possible location of opportunity for accommodation expansion is around Epping Forest, where targeted and carefully designed accommodation provision could play a role in improving the Forest's profile as a destination for appropriate outdoor recreation, generating a new income stream to support Forest wildlife, access and heritage management. While the important statutory protections and restrictions on development in the Forest preclude the potential for new build accommodation in the Forest itself, there could be opportunities for sensitively-designed accommodation provision in other areas adjacent to but buffered from the Forest. Revisions to the Forest's guiding legislation, likely to come into force in 2019, could also permit more flexibility in relation to commercial activities in the Forest, including the letting of existing cottages no longer needed for Forest workers. Converting these cottages to high quality self-catering for visitor markets would be a good way to deliver new supply without new buildings. Beyond this, low impact forms of visitor accommodation such as glamping, tree camping, camping pods, treehouses, lodges and touring caravan and camping sites could potentially be considered for less sensitive sites. All of this would be subject to further investigation and the development of an agreed corporate policy and spatial strategy. Given the importance of the historic landscape character a responsible approach is required, which has been successfully achieved in or around other protected landscapes and forests.

4.4. Testing Hotel and Visitor Accommodation Developer Interest

Sampling and Approach

4.4.1 There were two principal strands of research undertaken to test potential hotel and visitor accommodation developer interest in Epping Forest District:

- Testing budget and branded hotel company interest in the towns in the southern part of the District and identifying any obstacles to securing sites and bringing investment forward here;

- Testing potential interest from the developers and operators of other forms of visitor accommodation in being represented in the District, their view of the market, what they might want to deliver here in terms of type and scale of offer, where they would want to be, their site requirements, and any issues around deliverability.

4.4.2 The research was undertaken via a combination of email and telephone surveys with the owners and senior management teams of hotel and visitor accommodation developers, operators and investors, and in some cases with agents representing them and playing an active part in their site finding, acquisition, planning and development programmes. The sample was drawn from Hotel Solutions' database of sector contacts, to be representative of the full range of visitor accommodation development opportunities identified in the market research. This included national operators associated with any key proposals in and around the study area as well as targeting other national brands known to be active in the market with brands that have good fit to the identified market potential. The sample of accommodation developers contacted is given at Appendix 4.

Epping Forest District as a Hotel and Visitor Accommodation Investment Location

4.4.3. Epping Forest District has some significant strengths as an investment location for hotel and other forms of visitor accommodation, whether it be in terms of new development or the acquisition and redevelopment of an existing site/operation:

- Principal amongst these is proximity to London. This includes staying here and visiting London for business and leisure purposes, often on the grounds of price and also convenience for those travelling here by car but not wanting to take their vehicle into the city.
- Catchment population – London is a significant part of this but also the Home Counties. For short breaks in particular a large catchment within a 2 hour drive time is sought, which Epping Forest District as a location can offer.
- Good access – being at the intersection of the M25 and M11, but also offering good access by rail and underground, making it easy for that catchment population to get to the area. This also makes sites close to motorway junctions good for meeting point hotels that have the ability to capture transient business.

- The Forest itself has appeal for some accommodation developers and operators, particularly those for which a rural setting is required. Also the fact that Epping Forest is known and has an identity, helping put it on the map, certainly for recreational purposes.
- The Lee Valley Regional Park is also a strength, boosted by exposure around the 2012 Olympics, but also the on-going legacy in terms of continuing to attract visitors to large events, providing a reason to visit.

4.4.4. On the down side, there are some perceived weaknesses when considering this area for hotel or visitor accommodation investment:

- From a hotel perspective, the main towns in the District are small in population and critical mass of infrastructure and corporate development to meet the criteria of many of the larger hotel brands, which are generally looking for populations of around 100,000+ for hotels of scale (100+ rooms) and full-service hotels.
- Green Belt and other restrictions – developers will need to have confidence that they have a reasonable chance of success at planning to put the time and effort into working up schemes, particularly schemes of scale.

Interest from Hotel Developers and Operators

4.4.5. The focus of our testing of hotel developer interest was on budget hotels – Travelodge, Premier Inn, Easyhotel - in line with the findings on market potential. However, we also sampled the main international multiple brand owners – Hilton, Accor and InterContinental Hotel Group – who have limited service or upper tier budget brands, and because they offer the full range of brands from budget/limited service to upscale/ luxury, also provided some feedback on a wider range of potential hotel products both in terms of standard and scale.

4.4.6. Both Travelodge and Premier Inn have locations in Epping Forest District on their target acquisition lists. In order to assess whether they are facing any difficulties in securing sites to meet these requirements, we have undertaken telephone and email consultations with four of their acquisition managers (covering within and beyond the M25) and with Travelodge's national planning consultants Smith Jenkins. Current requirements are summarised overleaf, alongside existing representation.

PREMIER INN & TRAVELODGE TARGETS & REPRESENTATION – EPPING FOREST DISTRICT

LOCATION	PREMIER INN TARGET (No. of Rooms)	TRAVELODGE TARGET (No. of Rooms)	ALREADY REPRESENTED (No. of Rooms)
Epping	Y (60-80)	Y (60)	
Waltham Abbey		Y (60)	Premier Inn (99)[1]
Debden	Y (80-100)	Y (60-70)	
Loughton	Y (80-100)	Y (60-70)	
Buckhurst Hill		Y (60-70)	Premier Inn PI (50)
Chigwell	Y (80-100)		Travelodge (34)

Notes:
1 Planning permission granted for a 34-bedroom extension

4.4.7. The two types of site opportunity typically being developed by Premier Inn and Travelodge are either freestanding hotels, or inclusion in mixed use development schemes, which might be a combination of retail, leisure, other commercial and residential uses, often in town centre locations but sometimes in out of centre developments. Both Travelodge and Premier Inn are ideally looking for associated car parking (Travelodge quoted a 75% car parking to room ratio), which can be in nearby public car parks in a town centre location. In mixed use schemes, they also need on-site food and beverage offerings such as restaurants, fast food outlets and coffee shops. In terms of floorspace requirements, Travelodge quote 18,000 sq ft for a 60-bedroom hotel; Premier Inn quote 25,000 sq ft for 60 bedrooms and 35,000 sq ft for 80 bedrooms. In mixed-use schemes hotels can be an upper floor use with no ground floor presence needed other than an entrance and/or reception.

4.4.8. Both hotel companies reported that they face major difficulties in securing hotel sites in Epping, Waltham Abbey and the Buckhurst Hill/Loughton/Chigwell/Debden area. The following quote sums up the issues:

'Availability of suitable and viable sites, whether conversion or new build opportunities, remains a challenge in these locations when we are competing with high residential land values.'

4.4.9. Both companies see working with the District Council as a possible solution:

'We would be keen to explore local authority opportunities and work with them on sites which they either earmark as potential hotel development opportunities and/or where they fall under local authority control.'

4.4.10. Examples of locations quoted by those interviewed where sites have been allocated for a hotel that the budget hotel operators have been involved with included Rochester (Rochester Riverside development brief and masterplan, adopted as a supplementary planning document in September 2014, Travelodge) and Bromley (Town Centre Area Action Plan, progressed by Premier Inn and Cathedral Hotels as part of the St Marks Square mixed use regeneration scheme). Examples of sites developed with local authorities on council owned sites – in some cases also with council investment - include Redhill, Eastleigh, Bicester, Aylesbury and Thetford (Travelodge), and Premier Inns at Addlestone, Northampton, Monmouth, Blackburn And Rhyl.

4.4.11. Easyhotel were not interested in locations in Epping Forest District. As a new budget hotel brand, their priority was outer London locations in Zones 1 and 2.

4.4.12 Other multiple brand hotel companies expressed interest in Epping Forest District Locations for their limited service brands (Ibis/Ibis Styles, Holiday Inn Express, Hampton by Hilton), and potentially from their conversion brands e.g. in the case of Accor Mercure, a 'softer' brand in terms of physical specification that can be applied to existing hotels. Given the size of the towns in the District, all saw these locations as secondary and very much opportunistic, dependent upon a site and an investor coming forward with a proven market study rather than any pro-activity on their part. There was interest in all 6 locations probed in the interviews – Buckhurst Hill, Chigwell, Debden, Epping, Loughton and Waltham Abbey – with the strongest interest in Epping, Debden/Loughton and Waltham Abbey.

Interest from the Developers of Other Forms of Visitor Accommodation

4.4.13. In terms of other forms of visitor accommodation developer/operator/investor, there was interest from a range of quality offers. These included holiday lodge parks, glamping, caravan and camping and pub accommodation. Some of these developers/operators would require developments of scale to be viable – a minimum of 70-100 lodges or pitches for Forest Holidays and the Caravan & Motorhome Club, and up to 120-150 holiday lodges for Grand Leisure, in order to cover the costs of infrastructure development and central leisure and catering facilities, which need a critical mass of accommodation units to support them. There were though some smaller scale options from interested developers, such as Featherdown Farms and Lanterns & Larks, who will develop as few as 6-8 tented units which are temporary in nature, and so can deliver a much lighter touch, lower impact option. Another operator that expressed interest in the District was Natural Retreats. They develop small groups of eco lodges and sympathetically convert properties on large estates. Many of these are high end, expensive offers, and they need a large volume catchment with significant affluence to work, which the District can offer. In addition, gastropub operator Revere has Loughton and Epping on its target acquisition list. It develops high quality boutique bedrooms in association with a gastropub offer.

4.4.14. These developers and operators are very interested in Epping Forest District, but well aware of the difficulties of developing visitor accommodation in rural areas, and particularly in Green Belt locations. One of the issues that emerged in the Phase 1 work was concern about controlling permanent residential use of holiday lodges on holiday lodge parks. The holiday lodge operators that we spoke to face this sort of potential objection from local authorities in all locations, but are happy to agree to legal conditions on planning consents to give local planning authorities the assurances that they need. Moreover, as operators do not want people permanently living on their holiday lodge parks as this alters the character of any site. They thus build their own regulations into hire agreements to prevent this from happening.

4.5 Obstacles to Investment

4.5.1 There are three principal barriers holding back investment in hotels and other forms of visitor accommodation in Epping Forest District. These are:

- The availability and deliverability of suitable sites;
- The constraint of Green Belt;
- Planning restrictions and concerns about enforcing and sustaining holiday use.

4.5.2 The availability, suitability and deliverability of sites is a significant barrier across the District to investment in all forms of visitor accommodation. This results from a combination of competition from higher value uses, notably residential, and constraints on development due to Green Belt and other designations that apply here. Premier Inn and Travelodge are facing major difficulties in securing sites to meet their target requirements in the District. The District Council may need to play a role therefore in terms of making some of its land and property holdings available for hotel and visitor accommodation development. It will however still need to get best value from its property portfolio, and will undoubtedly be under pressure to maximise value which again can price hotels and other forms of visitor accommodation out of the market.

4.5.3 Green Belt policy clearly imposes significant restrictions on the potential for accommodation development in the District's rural areas, particularly in terms of new-build accommodation and accommodation developments of any scale. Landscape, conservation and scientific designations in Epping Forest, as well as the requirement under the governing Act of Parliament to safeguard the Forest for public access, restrict the potential for accommodation development in the Forest. The Act as it stands also limits the commercial letting of properties in the Forest e.g. for holiday use.

4.5.4 Planning policy and its implementation is also seen as a barrier to investment, reflected in the number of refusals of schemes. Site-specific issues apart, District Council Members appear to have three particular areas of concern:

- The ability to enforce holiday use, to ensure that people are not living in holiday units permanently;
- The pressure for conversion to permanent residential in the case of market failure;
- The permanency of holiday accommodation development, even low impact forms such as glamping, if they leave a footprint on the land, which might then be a chink in the armour for a developer to try to achieve planning for some other use, as previously developed land.

4.5.5 These concerns can however be addressed through the following means:

- Holiday use is successfully controlled at sites across the country through a combination of legal conditions attached to planning permissions (often a 28 day occupation rule) and built into property leases.
- Strong tests can be put in place around market failure to ensure that accommodation businesses have been effectively managed, marketed and invested in before considering exit to an alternative use, They should be marketed for sale with sector specialist agents at a realistic price, and for a reasonable period, to try and attract a buyer that would retain that use. These tests can be built into planning policy.
- Low impact visitor accommodation like glamping units and some holiday lodge units do not necessarily require a concrete base; timber bases will suffice which can be removed with the unit and leave no permanent mark on the landscape.

5. HOTEL & VISITOR ACCOMMODATION DEVELOPMENT OPPORTUNITIES

5.1 Market Opportunities for Hotel & Visitor Accommodation Development

5.1.1. The Phase 2 work has confirmed and further clarified the market opportunities for hotel and visitor accommodation development in Epping Forest District as follows:

In the Settlements in the South of the District

- The need to improve existing low quality hotels in Epping (although no evidence of a recognition of this requirement by their owners);
- Clear potential for new budget hotels in the south of the District – Epping (a target for Premier Inn and Travelodge), Waltham Abbey (a target for Travelodge), Buckhurst Hill (a target for Travelodge), Loughton, Chigwell and Debden;
- New-build pub restaurants with lodge accommodation (typically 30-40 bedrooms);
- Boutique hotels in Epping, and potentially Loughton, given suitable properties for conversion, e.g. the old police station in Epping;
- Pub accommodation;
- Guest houses and B&Bs;
- Restaurants with rooms.

On the Outskirts of Harlow

- Possible scope for hotels to be developed on the outskirts of Harlow, depending on Harlow Council's strategy for hotel development in the town.

In the Lee Valley Regional Park

- Accommodation linked to the proposed Lee Valley White Water Centre activity zone/leisure destination on adjacent and/or linked sites in Epping Forest District;
- Watersports resorts at other watersports lakes;
- The proposed children's activity holiday centre at Royal Gunpowder Mills, if an acceptable alternative scheme comes forward;
- Waterside holiday lodge developments, with lodges for rental and/or timeshare or outright purchase;
- Fishing lodges;
- Further provision for touring caravanning and camping;
- Glamping sites;
- Camping pod parks;
- Additional hostel or bunkhouse accommodation;
- Additional leisure moorings.

In and around Epping Forest

- The potential conversion of redundant forest workers' cottages to high quality self-catering accommodation, once revisions have been made to the Forest's guiding legislation (assuming that it allows such commercial activity in the Forest);
- Small-scale, low-key accommodation sites in areas adjacent to but buffered from the Forest, and possibly on less sensitive sites in the Forest, including glamping sites, small touring caravan and camping sites, small camping pod developments, barn conversions to self-catering accommodation, tree camping, and eco camping.

In the District's Other Rural Areas

- Luxury and/or boutique country house hotels, given suitable properties for conversion. This could require some new-build extensions to achieve a viable hotel. Our research did not identify any suitable properties however (although did not include any site search work in the District's rural areas)
- Hotels on golf courses, possibly through the conversion of existing buildings, but probably involving new-build hotel bedrooms and facilities;
- Pub accommodation in villages and rural locations. This may require new-build bedroom extensions;
- Restaurants with rooms;
- Accommodation at wedding and events venues, perhaps requiring new-build extensions;
- Farmhouse, rural and village B&Bs, including airbnb rooms and houses;
- Holiday lets in terms of the letting of residential cottages and barn conversions;
- Holiday lodge parks and eco lodge parks, with lodges for rental and/or outright or timeshare ownership, if suitable sites that can achieve planning permission in the Green Belt can be identified;
- Golf lodges on golf courses;
- Fishing lodges around fishing lakes:
- Treehouses;
- The enhancement and possible expansion of existing touring caravan and camping sites;
- The development of new touring caravan and camping sites;
- Eco camping;
- Glamping sites;
- Camping pod developments;
- Tree camping;
- The development of existing group and youth accommodation – Woodland Camp, Lambourne End, Gilwell Park Scout Activity Centre, Chigwell Row Camping & Activity Centre;
- New group and youth accommodation – hostels, bunkhouses, outdoor activity centres with accommodation;
- Wellness retreats and spas with accommodation.

6. CAPITALISING ON THE OPPORTUNITIES

6.1 Key Messages in Articulating a Forward Strategy

6.1.1. The Brief for this Visitor Accommodation Needs Assessment set out the Council's ambition to develop the District's visitor economy, drawing on the 'green and unique' character of the District, through a different approach to planning policy in the new Local Plan and broader pro-activity by the local authority and partners locally. Additional visitor accommodation is needed to increase the number of staying visitors, which are currently dwarfed by the volume of day visitors attracted to the District. The Draft Economic Development Objectives formulated from Member workshops (November 2014) includes tourism as one of 6 priorities, identifying the need to increase and expand the visitor economy through promotion and the provision of new guest accommodation.

6.1.2. Our research has shown that there is a market potential for additional visitor accommodation development – both serviced and non-serviced - across Epping Forest District, and given the limited capacity in current stock, a clear need for additional accommodation to achieve growth in the visitor economy. Visitor accommodation development can also play wider roles in terms of:

- Improving the vitality of town centres, particularly in terms of helping to boost their evening economies;
- Keeping village and country pubs open and viable, maintaining them as a resource for local communities;
- Improving farming and country estate incomes and thus supporting agriculture and landscape management;
- Creating jobs for local people and self-employment opportunities;
- Sustaining existing tourism and leisure businesses, such as golf courses, fishing lakes, horse riding stables, wedding venues and visitor attractions;
- Finding new uses for redundant and even derelict buildings and sites;
- Serving the needs of the business community, primarily in terms of hotel accommodation to allow companies to do business effectively, cater for their business visitors, and provide facilities for meetings and conferences.

6.1.3. The market potential identified is matched by hotel and visitor accommodation developer, investor and operator interest in developing additional accommodation in the District. However, this is an area of planning constraint alongside intense pressure for development from multiple uses, many of which (particularly residential but also commercial and employment uses) sit much higher up the pecking order than the visitor economy and visitor accommodation, both politically and in terms of the land values they can support. All of this makes it a challenge for interested developers to secure sites and deliver schemes. Delivery is likely to require some positive interventions by the Council and its partners on a number of fronts to support and accelerate development. This analysis forms the basis of our recommendations for how the District Council can fully capitalise on the identified hotel and accommodation development opportunities in the District going forward, through both its role as the local planning authority and the more proactive interventions that it can make to accelerate accommodation development.

7. IMPLICATIONS FOR FINALISING THE LOCAL PLAN

7.1 The Key Issues Addressed by the Phase 2 Work

7.1.1. The key issues that the Phase 2 work was commissioned to assess were as follows:

- The need to allocate sites for budget hotel development in the south of the District;
- The need for more explicit policies for visitor accommodation development in the Lee Valley Regional Park;
- The need for more explicit policies for visitor accommodation development in Epping Forest;
- How to strengthen the accommodation retention policy under Draft Policy E 4.

7.1.2. We have also considered how Draft Policy E 4 might be further strengthened to support the hotel and visitor accommodation development opportunities that we have confirmed and further identified through the Phase 2 work.

7.1.3. Draft Policy E 4 is reproduced overleaf for reference.

Draft Policy E 4 The Visitor Economy

A. Opportunities for the sustainable development of the visitor economy will be supported where they are of a scale, type and appearance appropriate to the locality and provide local economic benefits, through the following measures:

i) Support for the development of high quality visitor accommodation in terms of new hotels in settlements, accommodation linked to outdoor sport and activity hubs in the Lee Valley Regional Park, and rural accommodation of an appropriate scale and type that makes use of existing buildings and strengthens existing rural leisure businesses;

ii) Support for the upgrading of existing visitor attractions, visitor centres and development of appropriate new ones;

iii) the retention and improvement of existing visitor accommodation and venues unless there is proof that there is no market interest in acquisition and investment to allow continued profitable operation;

iv) encourage sustainable tourism in rural areas. This will include better linkages between the towns and rural surroundings; and the promotion of opportunities for the understanding and enjoyment of the Lee Valley Regional Park and Epping Forest while recognising the importance of conserving and enhancing the cultural heritage of the area, as assets that form the basis of the tourist industry here;

v) support a year-round visitor economy while ensuring the facility remains for visitor use;

vi) support the improvement of sustainable transport opportunities for visitors and encourage the use of sustainable transport modes to reduce the impact of visitors on the highway network; and

vii) encourage local food and produce and appropriate tourism development that supports rural business and farm diversification.

Source: Epping Forest District Draft Local Plan Consultation 2016

7.2 How Well Draft Policy E4 Supports Accommodation Development

7.2.1. Draft Policy E 4 supports new hotels in settlements. Our Phase 2 work has confirmed the market potential for, and hotel company interest in, budget hotel development in the settlements in the south of the District (Epping, Waltham Abbey, Chigwell, Loughton, Debden, and Buckhurst Hill). Budget hotels can play a role in supporting the evening economy of these settlements through the demand that they generate for restaurants, bars and evening entertainment venues e.g. cinemas. They can however contribute to night-time antisocial behaviour where guests are staying over after an evening in a town centre nightclub. Our Phase 2 research has also confirmed the challenges that budget hotel companies are facing in securing hotel sites in the District's settlements as they are unable to compete with higher-value uses, most notably residential. These factors suggest a need to consider other locations for hotel development, in particular existing and new employment sites, where hotels could act as an ancillary use to support other business uses, where hotels are less likely to be competing with residential development, and also less likely to contribute to night-time antisocial behaviour problems in town centres. This could however conflict with Draft Policy E 1, which seeks to retain existing employment sites and uses, unless hotels are viewed as an employment use and/or their role in supporting other business uses is recognised.

7.3. The Need to Allocate Hotel Sites

7.3.1. Our Phase 2 work has confirmed that:

- There is strong demand for budget hotel accommodation in the south of Epping Forest District from business visitors, contractors, people attending weddings and family parties, the visiting friends and relatives market, and UK and overseas tourists visiting London.

- There are frequent shortages of budget hotel accommodation in the south of the District, with existing budget hotels consistently filling and turning business away for much of the year, which are likely to increase as hotel demand grows with the development of the District's economy, growth of its population, and expansion of its visitor economy.

- Hotel companies are interested in opening new budget/ limited service hotels in the south of the District, with Premier Inn and Travelodge targeting a number of locations here, and other hotel companies prepared to look at opportunities for their limited service hotel brands.

- Hotel companies are facing major challenges in securing hotel sites in their target locations in the south of the District, due to their inability to compete for sites with higher value uses, in particular residential.

7.3.2. Our evidence shows that new budget hotels are needed to grow the visitor economy and support business development, and can play a role in supporting town centre evening economies, but that the market is unable to deliver new budget hotels because of the sites challenge.

7.3.3. One option to address this challenge, and ensure that the required budget hotel development is not frustrated by site availability, is for the Council to allocate suitable, deliverable sites for hotel development in the Local Plan. While the Council rejected this option in the Consultation Draft, our Phase 2 work suggests a need to reconsider. From ongoing liaison with Planning Policy at EFDC however, it is felt this will be a difficult position to reach considering the many competing demands for limited land, particularly in the south of the district.

7.3.4. Our Phase 2 work programme included a module of work at a high level to identify and assess potential hotel sites in the south of the District that could be considered in the site selection process as possible sites for allocation for hotel development. The results of this exercise are reported at Appendix 5. This work identified strong hotel sites in three locations (Epping, Waltham Abbey and Debden) that we have suggested merit consideration in the site selection process for allocation for hotel development. Our work did not include any discussions with the owners of these sites to assess their willingness to see their sites allocated for hotel use. This will need to be a further phase of work therefore, if the Council sees merit in pursuing the hotel sites allocation option.

7.3.5. Our Phase 2 work programme also included research to identify examples of locations where local authorities have allocated hotel sites in planning policy documents. The results of this research are reported at Appendix 6. They show that hotel site allocation is being pursued in a number of towns and cities where hotel companies are struggling to compete for sites.

7.4. The Need for More Explicit Policies on Accommodation Provision in the Lee Valley Regional Park

7.4.1. Draft Policy E 4 supports 'the development of high quality visitor accommodation linked to outdoor sport and activity hubs in the Lee Valley Regional Park', and 'encourages the promotion of opportunities for the understanding and enjoyment of the Lee Valley Regional Park'. In our view, this policy wording adequately covers the types of accommodation that we have identified potential for in the Lee Valley Regional Park, and that are likely to be acceptable in the Green Belt.

7.4.2. From the discussions that we had with Vibrant Partnerships it is apparent that they have ambitious plans to develop the Lee Valley White Water Centre as a major leisure destination offering a range of adrenaline sports and family activities and on-site visitor accommodation. While the White Water Centre is in Broxbourne, the Showground site, which Vibrant Partnerships envisages incorporating into the scheme, is in Epping Forest District. There could also be scope to extend the scheme to include linkages to sites in Epping Forest District, e.g. The Royal Gunpowder Mills and Gunpowder Park, that could provide visitor accommodation and complementary outdoor recreation and sports activities, as was envisaged in the Nathaniel Lichfield & Partners 2011 Economic Development Study for the Centre. Given the scale of what Vibrant Partnerships is proposing at the White Water Centre, the potential linkages to, and possible incorporation of sites in Epping Forest District, and the potential for the scheme to act as a major growth driver for the visitor economy in the surrounding parts of the District, there would be merit in a specific supportive reference to the development of the White Water Centre as a leisure destination under Policy E 4. This would be consistent with the approach that Broxbourne Council has taken in its new Local Plan.

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Broxbourne Borough Council | Regulation 18 Draft Local Plan

13 Lee Valley Regional Park

13.1 The Lee Valley Regional Park connects central London at the River Thames with central Hertfordshire. Much of the Park is contained within Broxbourne and most of the land between the River Lee and the West Anglia railway lies within the Park. In total, 432 hectares of Lee Valley Park land lies within Broxbourne.

13.2 The Park is a wonderful amenity for the residents of Broxbourne. It is home to the Olympic legacy facility of the Lee Valley White Water Centre, the River Lee, the Lee Navigation and a network of lakes, woodlands, wetlands, paths and wildlife habitats. The Council is fully supportive of and will continue to work with the Lee Valley Regional Park Authority to improve the Park as a local and regional amenity, as a recreational resource, as a public amenity and as a habitat for wildlife.

13.3 The Park Authority has produced a framework plan for the Park area within Broxbourne and has consulted on that plan. The Council is supportive of the majority of proposals within the Plan and this Local Plan contains policies below that make specific provision for the key proposals.

Policy LV1: Lee Valley Regional Park

The Council will support the Lee Valley Regional Park Authority in the continuing improvement of the Regional park.

Lee Valley White Water Centre

13.4 Home of the 2012 Olympic white water events, the Centre is a world class facility. The Park Authority is continuing to develop the Centre as an "adrenaline hub" with new and improved outdoor activities.

Policy LV2: Lee Valley White Water Centre

The Council supports the development of an adrenaline hub at and around the Lee Valley White Water Centre within the area indicated on the Policies map.

Source: Broxbourne Local Plan Draft Consultation July 2016

7.5. The Need for More Explicit Policies on Accommodation Provision around Epping Forest

7.5.1. Draft Policy E 4 supports the development of 'rural accommodation of an appropriate scale and type that makes use of existing buildings and strengthens existing rural leisure businesses'; encourages 'sustainable tourism in rural areas' and 'the promotion of the understanding and enjoyment of Epping Forest'; and encourages 'appropriate tourism development that supports rural businesses and farm diversification'. In our view, this policy wording provides adequate and appropriate support for the types of visitor accommodation that we have identified potential for around Epping Forest and rural areas. Given the sensitivities regarding increasing visitor activity and traffic in the Forest, we agree that a more explicit policy for accommodation development in Epping Forest is not warranted in the Local Plan.

7.6. Strengthening the Accommodation Retention Policy

7.6.1. Draft Policy E 4 (Measure A iii) seeks to ensure 'the retention and improvement of existing visitor accommodation unless there is proof that there is no market interest in acquisition and investment to allow continued profitable operation'. While this is a well worded policy, we would suggest that it can be strengthened through clearer guidance on what is meant by 'proof that there is no market interest in acquisition and investment' and the evidence that applicants will need to provide to demonstrate this. We would suggest a requirement for evidence that an accommodation business has been effectively marketed through a reputable specialist agent, for a reasonable period of time (at least a year), and at a realistic price, compared to the prices that have been achieved for other similar accommodation businesses.

7.7. Other Suggested Improvements

7.7.1. The wording of Measure i) under Draft Policy E 4 suggests that only rural accommodation that makes use of existing buildings will be supported. This would exclude visitor accommodation that does not require permanent buildings or the re-use of existing buildings, such as glamping sites, touring caravan and camping sites and camping pod developments. It would also exclude new-build accommodation units, such as holiday lodges, golf lodges, fishing lodges or treehouses, which could be suitable in appropriate settings in the District. We therefore suggest an addition to E4Ai as below, to make it clear that these other types of accommodation can be considered in the District.

> *……rural accommodation of an appropriate scale and type that makes use of existing buildings, strengthens existing rural leisure businesses,* ***or involves new low impact structures such as glamping, camping and holiday lodges.***

8. OTHER DISTRICT COUNCIL INTERVENTIONS

8.1. Introduction

8.1.1. A further objective of the Phase 2 work was to advise Epping Forest District Council on how else it can best support and accelerate hotel and visitor accommodation development in the District, beyond its role as the local planning authority. We suggest that there are a number of interventions that the Council can make in terms of the following:

- Securing new budget hotels;
- Raising awareness of the hotel and visitor accommodation development opportunities in the District;
- Pro-active follow up and support for accommodation businesses, land and property owners, and hotel and visitor accommodation developers interested in visitor accommodation development;
- Engaging with Vibrant Partnerships on the masterplanning for the development of Lee Valley White Water Centre as a leisure destination;
- Encouraging Vibrant Partnerships to develop a clear accommodation strategy for Lee Valley Regional Park;
- Supporting the development of the Visitor Economy Strategy for Epping Forest, including approach to accommodation provision;
- Working with Harlow Council to develop a joined-up approach to hotel development in Harlow;
- Progressing marketing and product development initiatives to help grow accommodation demand in the District.

8.1.2. We discuss each of these potential areas for District Council intervention in the following sections.

8.2. Securing New Budget Hotels

8.2.1. In addition to its role as the local planning authority, there are a number of other roles that the District Council can play to secure new budget hotels in the south of the District:

a) As Land and Property Owner

Given the challenges that budget hotel companies are facing in competing for sites with residential development, there is a case for the Council to bring forward suitable sites and buildings that it owns for budget hotel development, in order to address this area of market failure and secure a needed use that the market is otherwise unable to deliver. Some of the strongest sites that we identified for hotel development are in District Council ownership (EFDC's Housing Depot Site within the wider St John's Road Area development site, Epping, EFDC Civic Offices, Epping and the BP petrol filling station at The Broadway in Debden). We have not investigated whether the potential hotel sites that we have identified in other parts of the south of the District are in Council ownership however.

b) As an Investor

Local authorities are increasingly investing in budget hotel development schemes as a means of generating an income to boost council budgets. They typically use their preferential borrowing powers to fund the development of a budget hotel that they then lease to Travelodge or Premier Inn, with the rental that the hotel company pays repaying the loan and generating a surplus for the council. We have provided at Appendix 7 some examples of local authority and public-sector investment in hotels.

c) Through Influencing Masterplans and Development Briefs for Key Sites

The District Council could seek to influence the masterplans and development briefs for key development sites where it would be appropriate to encourage a budget hotel as part of the mix. This would not however guarantee the delivery of budget hotels as they are often one of the first elements of a mixed-use scheme to be challenged given higher value uses. As referred previously, the St John's Road Area Development Brief includes a budget hotel element.

8.2.2 There are thus a number of interventions that the District Council can make to help bring forward the needed budget hotel development that the market looks unlikely to deliver itself. The political will clearly has to be there however. From the responses that we have had from some Council Members there appears to be a misconception at the political level that the proposed partial conversion of The Bell Hotel in Epping to a care home and the closure of the Epping Phoenix Hotel (formerly the Travelodge Harlow North Weald) indicates a lack of demand for hotel accommodation in the District. These hotels have failed due to a lack of investment and effective management and marketing, and in the case of the Epping Phoenix Hotel its location, not because of a lack of demand for hotel accommodation in the District. Our research has evidenced exceptionally high levels of occupancy for the District's budget hotels, and significant levels of denied business. New budget hotels would undoubtedly fill quickly and perform at very strong levels of occupancy, supporting the development of the District's business and leisure markets, increasing spend and creating jobs.

8.3. Raising Awareness of the Opportunities

8.3.1. A key role for the District Council is to raise awareness of the opportunities for hotel and visitor accommodation development that the Visitor Accommodation Needs Assessment has identified potential for, with all those that might be interested in bringing forward or supporting visitor accommodation development projects in the District, including:

- Existing visitor accommodation businesses that might want to expand, upgrade, reposition, or develop new accommodation, including those hotels and visitor accommodation businesses that Hotel Solutions spoke to as part of the Visitor Accommodation Needs Assessment;
- Land and property owners and farmers, who may wish to bring forward sites for various forms of visitor accommodation;
- Existing leisure businesses that might wish to diversify their offer with the addition of accommodation e.g. golf courses, fishing lakes, equestrian centres, wedding venues, pubs, restaurants and visitor attractions;
- Property developers;
- Commercial property agents;
- All relevant officers and elected members of the District Council (planning policy, development management, estates, finance, economic development, town centre management, and tourism);

- The relevant officers of the South East LEP, in particular those responsible for the allocation of EAFRD funding and successor programmes of support for rural tourism;
- The Eastern Plateau Rural Development Programme team, to inform the allocation of its funding to suitable rural accommodation projects in the District.

8.3.2. This should include as a minimum:

- Uploading the report, or an edited version of it, onto the District Council's website;
- Promoting the availability of the report directly to all of these interested parties through email contact and a weblink to download the report.

8.3.3. The Council could also go further in terms of:

- Meetings with key partners e.g. Vibrant Partnerships, City of London Corporation, and the Eastern Plateau Rural Development Programme team to discuss the findings and how to act on them;
- Promotion of the availability of the report through PR and social media activity.

8.4. Pro-active Follow Up of Developer Interest

8.4.1. The research has identified developer and operator interest in visitor accommodation development in Epping Forest District from a range of companies and organisations, including some high quality offers and operators with the ability to deliver both profile and significant economic benefit to the District. The opportunity is there now that interest has been 'warmed up' to follow up with the interested developers on an individual basis, to better understand their requirements, and support them through the process of bringing schemes forward. This needs to be resourced and led from within the Council or there is a danger this interest will fall by the wayside. Support through the site identification and delivery process is likely to be a priority.

8.4.2. The recent interest established is just a snapshot, and other visitor accommodation interest is likely to come forward, including from more local interests. Pro-active engagement with interested accommodation businesses, land and property owners, farmers, rural leisure businesses, and property developers should also be prioritised, to identify if the District Council can support hotel and visitor accommodation development opportunities through planning, business support, and the promotion of site opportunities.

8.5. Supporting the Development of Lee Valley White Water Centre

8.5.1. Vibrant Partnerships has ambitious plans to develop the Lee Valley White Water Centre as a major leisure destination, with a range of adrenaline sports and family activities, and on-site visitor accommodation. Vibrant Partnerships may seek to include sites within Epping Forest District within any scheme that it develops, such as the Showground site adjacent to the Centre. There is scope for development here to provide a significant boost to the visitor economy in the surrounding parts of Epping Forest District and it could help to support the development of visitor accommodation and other outdoor activities on linked sites in the District, such as The Royal Gunpowder Mills, Townmead, Gunpowder Park, the Lee Valley Park Farms, Holyfield Hall Farm and Fishers Green. Epping Forest District Council should thus be working proactively with Vibrant Partnerships to develop its plans for the White Water Centre and surrounding sites in Epping Forest District.

8.6. Encouraging an Accommodation Strategy for Lee Valley Regional Park

8.6.1. The Visitor Accommodation Needs Assessment clearly identifies the Lee Valley Regional Park as a key location of opportunity for visitor accommodation development in the District. The Park Development Framework (PDF) includes an objective (1.5.) for the development of a range of accommodation in the Park, and identifies a number of accommodation proposals and various actions for how the Lee Valley Regional Park Authority (LVRPA) will achieve this objective. The PDF was published in July 2010 and much has changed over the last 7 years since its publication. We believe therefore that there is merit in LVRPA and Vibrant Partnerships undertaking work to develop a clearly articulated and researched Visitor Accommodation Strategy for the Park, alongside the development of the masterplan for the Lee Valley White Water Centre. This would provide a focus for accelerating accommodation development in the Park and a context for the White Water Centre proposals. Epping Forest District Council should thus encourage and support LVRPA to develop such a strategy, and should proactively participate in the process to maximise the opportunities for accommodation development in Epping Forest District.

8.7. Supporting the Visitor Economy Strategy for Epping Forest

8.7.1. From our discussions with the City of London Corporation, we understand that they have plans to develop a Visitor Economy Strategy for Epping Forest, which will include consideration of the opportunities to provide visitor accommodation. Epping Forest District Council should thus share the findings of the Visitor Accommodation Needs Assessment with the relevant officers of the Corporation, and should look at how it might be able to support more detailed work that may be needed to assess specific accommodation opportunities around the Forest and surrounding rural areas in Epping Forest District.

8.8. A Joined-Up Approach to Hotel Development in Harlow

8.8.1. As part of the Visitor Accommodation Needs Assessment we undertook work to assess the strength of demand for hotel accommodation in Harlow and the need for new hotels here. We have also recently completed a study for Essex County Council[1] to determine whether new full-service 3/4 star hotels are needed to meet corporate demand in key towns in Essex, including Harlow. Both pieces of research point to a need for new hotels in Harlow. With the northern edge of Epping Forest District very much in Harlow's sphere of influence there could potentially be sites in the District on the edge of Harlow that would be suitable for the development of new hotels to meet this need (the Visitor Accommodation Needs Assessment did not include any work to assess potential hotel sites in this part of the District however). There are however other locations in Harlow where new hotels could come forward. The developers of the Harlow Science Park are about to go out to market with a hotel site, and this would clearly be a strong location for a new hotel. Harlow Council may also wish to encourage new hotel development in the town centre to help support its regeneration. There may also be potential for a hotel as part of the Harlow and Gilston Garden Town. There is a need therefore for Epping Forest District Council to work with Harlow Council and East Hertfordshire District Council to develop a joined-up approach to hotel development for Harlow.

[1] Essex Corporate Hotel & Conferencing Facilities Study – Hotel Solutions – July 2017

8.9. Growing the District's Accommodation Market

8.9.1. The other key role that the District Council can play to help support and accelerate hotel and visitor accommodation development in the District is to help grow the District's accommodation market. Our research suggests the following as initiatives for the Council to consider in this respect:

a) Growing Corporate Demand

The District Council can play a key role in growing corporate demand for hotel accommodation in the District through encouraging and supporting the development of business parks, offices and employment sites, and attracting companies to them that will have requirements for hotel accommodation. National and international headquarters, international companies, and sectors such as professional and financial services, advanced manufacturing, pharmaceuticals, scientific research and development and digital media are generally the most productive in terms of hotel demand.

b) Capitalising on the Lee Valley White Water Centre

The District Council can play a role in working with Vibrant Partnerships and hotels and accommodation businesses in the south of the District to develop and promote white water leisure break and leisure and corporate group packages with the Lee Valley White Water Centre.

c) Developing Events and Festivals

Our research suggests that an events-led strategy to growing visitor accommodation demand is likely to be the most productive for the District. The District Council should thus look to attract, develop, support and promote events and festivals that will have the pulling power to attract audiences from further afield that will require overnight accommodation. This could include sports, outdoor activity, arts, music, food and drink, family and woodland/forest-themed events and festivals.

d) Targeting the Weddings Market

Epping Forest District has a strong product in terms of wedding venues. There could be scope therefore for the District Council to work with these venues on promotional activity to attract weddings and to encourage wedding parties to extend their stay, explore the District, and return for future leisure visits.

e) Encouraging Exploration

Our research shows that the majority of staying leisure visitors come to the District for specific purposes – to attend a wedding or family party, visit friends and relatives, for an event, or just to get away from it all for a few days – rather than to visit the District as a visitor destination. From a marketing perspective, the priority should thus be about encouraging the visitors that come to stay in the District for these different purposes to explore the District during their stay, and ideally extend their stay or return to do this. The priority therefore is to provide the right information to staying visitors on what they can see and do in the area, through a combination of in-accommodation destination print and digital visitor information, and training and familiarisation visits for frontline accommodation staff, so that they can advise visitors from first-hand knowledge.

8.10. Moving Forward – Feeding into the Visitor Economy Strategy for the District

8.10.1 We have made above a series of suggestions for proactive intervention by the District Council to support and accelerate hotel and visitor accommodation development in the District and grow the District's visitor accommodation market. We envisage that the District Council will carry those actions that it wishes to implement across into the new Visitor Economy Strategy and implementation action plans that it is in the process of producing for the District. We do not see a need for a separate Hotel & Visitor Accommodation Development Acceleration Plan for the District. The Visitor Economy Strategy and the positive planning policy approach in the new Local Plan should be sufficient.

APPENDICES

APPENDIX 1

GLOSSARY OF DEFINITIONS – VISITOR ACCOMMODATION

Types of Hotel

Budget

Branded limited service hotels with clean and comfortable standardised en-suite bedrooms with TV and tea and coffee making facilities and paid for Wi-Fi but otherwise limited in-room provision or services such as guest toiletries or room service. Will locate in a wide range of locations from major cities to smaller towns, seaside resorts and airport locations. Size will vary significantly by location. Tend to be larger hotels (100-200 bedrooms) in major cities and smaller hotels (50-60 bedrooms) in provincial town locations.

Key budget hotel brands in the UK are Travelodge, Premier Inn, Ibis, Days Inn

Economy budget brands (with a more basic bedroom product) include Ibis Budget, Campanile and Metro Inns

Upper Tier Budget

A limited service hotel that offers a higher specification room than a budget hotel, with an integral bar/restaurant and possibly some meeting rooms. They tend to be larger hotels of 80-120 rooms and will locate both on the approaches to towns if close to business/leisure drivers, in town/city centres, and close to major communications drivers such as airports.

Brand examples include Express by Holiday Inn, Ramada Encore, Hampton by Hilton.

3 Star

A full service hotel that offers a restaurant and bar also open to the public, usually function/conference/banqueting facilities, and often leisure. Branded offers would tend to be 120-150 rooms+, but independent hotels may be smaller in size. Will locate in city centres and out of town where there are significant drivers of demand such as business parks.

Brand examples include Holiday Inn, Ramada, Village Urban Resort, Jury's Inn, Park Inn

4 Star

A full service hotel but with a higher specification and larger bedrooms than 3 star hotels, usually offering bath and shower, telephone, internet connection, and a wider range of services including full room service and porterage, and 24 hour reception. A quality restaurant, bar, a range of meeting rooms and business services, and a health and fitness centre. These tend to be large hotels, over 150 rooms, and sometimes up to 250 rooms+. Major city centres are the preferred locations.
Brand examples include Marriott, Crowne Plaza, Hilton, Radisson Blu, Novotel, Doubletree by Hilton, Copthorne, Millennium, Pullman, Macdonald

5 Star

A luxury, full service offer, with highly personalised service/high staffing levels, fine dining and luxury throughout the offer. UK 5 star hotel provision is focused largely on London and major heritage cities such as Edinburgh, Bath, Oxford and Chester
Brand examples include InterContinental, Radisson Edwardian, Hyatt, Wyndham, Sheraton, Hilton, Sofitel, Corinthia, Kempinski

Boutique

Relatively small (30-50 rooms), high quality, individual hotels that feature contemporary design and a good food offer. They are often independent hotels or part of small chains that bear the signature of their founder. However, national brands are beginning to emerge that are larger format units (100+ rooms) and compete with 3 and 4 star hotels but achieve a premium on their rate due to their style and service.
Brand examples include Malmaison, Hotel du Vin, Abode, Bespoke, Chapter, Hotel Indigo

Country House Hotels

A quality hotel, often a building of character, set in extensive grounds in a rural setting. Most are luxuriously appointed and the rooms frequently have special features often targeted at the leisure rather than the business guest. Some may have health and fitness facilities, swimming pools and spas and may be able to offer or arrange country sport activities such as clay pigeon shooting and fishing. The atmosphere of a country house hotel should be one of relaxation, comfort and style.

Golf Hotels and Resorts

Hotels attached to or developed with a golf course that can range considerably in their standard and the facilities on offer. Usually they would be at least 3 star in standard, and can be developed to 4 star and luxury standards, especially if in association with a championship course. As with country house hotels and other destination hotel offers that are more remotely located, most would usually offer, restaurants, bars, function/banqueting rooms, full leisure centres, often spas, and may also have other specialist facilities such as golf academies. Some also have shared ownership lodges in their grounds.

Brand Examples include De Vere Hotels, MacDonald Resorts, Marriott Hotels & Country Clubs.

Luxury Family Hotels

Luxury country house hotels that focus primarily on catering for the family breaks market. Luxury Family Hotels is the only national hotel company trading in this market. A number of luxury country house hotels also actively target the family market.

Adult Only Hotels

Country house hotels that cater exclusively for adults on short breaks. Warner Leisure Hotels is the only national company offering this type of hotel. Their hotels offer a wide range of sports and leisure facilities and activities as well as evening entertainment programmes.

Spa Hotels

Hotels with extensive spa and wellness facilities that focus on the spa break market.

Hotel Performance Terminology

Room Occupancy

The percentage of all rooms sold as a proportion of total rooms available in that period.

Achieved Room Rate (ARR)

The net average amount of rooms revenue that hotels achieve per night per room let after deduction of VAT, breakfast (if included), discounts and commission charges. Hotel rooms revenue divided by the number of rooms sold.

Revpar

Revenue per available room. The net average amount of rooms revenue that hotels achieve per night per available room after deduction of VAT, breakfast (if included), discounts and commission charges

Other Types of Accommodation

Inn

Bed and breakfast accommodation within a traditional inn or pub.

Boutique Inn

Inns that feature contemporary interior design, furnishings and fittings in guest bedrooms and public areas.

Restaurant with Rooms

Guest bedrooms provided above or alongside a restaurant operation. The restaurant is normally the most significant element of the business and is usually open to non-residents as well as staying guests. Breakfast is normally provided.

Guest House

A guest house normally has at least 4 letting bedrooms with en-suite or private bathroom facilities. It is usually run as a commercial business and will have been granted planning permission as such. Breakfast is usually provided and evening meals may also be offered.

B&B

Accommodation offering bed and breakfast, usually in a private house. B&Bs normally accommodate no more than 6 guests and may or may not serve an evening meal. Will not usually require planning permission unless the primary use of a property.

Boutique B&B

Luxury bed and breakfast accommodation that features contemporary, chic interior design, furnishings and fittings.

Farmhouse B&B

Bed and breakfast accommodation provided on a working farm.

Shared Accommodation (airbnb)

Rooms and sometimes entire houses or apartments that people rent out through accommodation sharing sites such as airbnb, One Fine Stay and Wimdu.

Holiday Cottage

Cottages, houses and converted barns that are let out for self-catering holidays and short breaks and other short stay purposes. They can be residential properties that are let by owners or through holiday cottage letting agencies or purpose-designed barn conversions that have been given planning permission for holiday use.

Boutique Self Catering

Luxury self-catering accommodation that features contemporary interior design

Super Cottages

Large self-catering properties that can accommodate parties of up to 20-30 guests. These can be large residential properties, e.g. manor houses that are let out as self-catering accommodation or large purpose-designed self-catering barn conversions. Such properties have developed to cater for the growing demand for family and friendship get togethers, celebrations and house parties. They generally trade at the top end of the market, offering high quality, luxury accommodation. They will include large living spaces and dining areas and usually feature the latest in-home entertainment systems. Some also have leisure facilities in terms of swimming pools, games rooms and snooker rooms.

Access Exceptional Self-Catering Cottages

Self-catering accommodation that is fully adapted for use by independent and assisted wheelchair users, usually including the following features:

- Wide doorways and corridors;
- Extra space for wheelchair users;
- Wheel-in showers, possibly with hoist rails;
- Bathrooms and toilets adapted for wheelchair users;
- Low-level kitchen counters;
- Ramps, lifts or stair lifts if needed.

Holiday Lodges

Timber lodges and log cabins that are let out for self-catering holidays and short breaks or used as second homes by their owners.

Holiday Lodge Parks

Complexes of timber holiday lodges for outright or timeshare purchase and/or rental. They have developed primarily in inland locations, often woodland or waterside settings and/or associated with other developments and activities such as marinas, golf courses (golf lodges), fishing lakes (fishing lodges), watersports or alongside hotels. Most holiday lodge parks are small – the average holiday lodge park covers 32.2 acres and has 35 lodges. Timber holiday lodges are generally seen as a more up-market and exclusive alternative to the traditional caravan holiday home: they are particularly popular with older and more affluent customers. Most holiday lodges have two or three bedrooms. Holiday lodge parks increasingly have a number of on-site leisure facilities, including restaurants, bars, swimming pools, gyms and children's play areas. Holiday lodges are generally purchased as second homes for holiday purposes. Most park operators offer a holiday rental service to owners and many make participation in such a service a condition of purchasing a lodge.

Fishing Lodges

Holiday lodges around fishing lakes, usually for rental.

Golf Lodges

Holiday lodges on golf courses for outright or timeshare purchase or rental.

Eco Lodges/ Eco Lodge Parks

Individual timber lodges or complexes of lodges that are built to the highest possible environmental sustainability standards and designed and operated to minimise their carbon footprint. Eco lodges will typically include features such as the use of sustainable materials in their construction, grass or sedum roofs, renewable energy sources, waste recycling, energy conservation measures and water conservation systems. Their green credentials are a key part of their marketing and many customers are increasingly choosing these types of accommodation because they want to go an eco-friendly holiday and reduce their carbon footprint. Eco lodge operators will usually also encourage their guests to take part in green activities in terms of car-free days out, walking and cycling, nature study, foraging, bird and wildlife watching, and buying local produce.

Treehouses

Luxury wooden treehouses that are rented out for self-catering holidays and short breaks

Holiday Parks

Parks that offer caravan holiday homes for ownership or rental, possibly alongside touring caravan and camping pitches. They can range in size from small independently run parks to very large parks with extensive leisure, entertainment and catering facilities that are operated by national holiday park companies such as Park Holidays, Park Resorts, Haven and Parkdean Holidays

Touring Caravan & Camping Sites

Sites that offer pitches for touring caravans, motor homes and tents. They can range in size from small, independently operated sites with minimal facilities and mainly grass pitches to extensive sites with central facilities and mostly hard standing pitches with electric hook up. National operators are the Caravan Club and Camping and Caravanning Club, which offer club sites across the country for their members, which in many cases are also open to non-members.

Certificated Sites

Small touring caravan and camping pitches that are certificated to operate by the Caravan Club and Camping & Caravanning Club, without the need for planning permission. Caravan Club certificated sites are for 5 touring caravan or motor home pitches. Camping & Caravanning Club certificated sites are usually for 5 touring caravan pitches and up to 10 tent pitches.

Eco Camping/ Wild Camping

Camping on small, basic, off-grid sites - usually grassed or forest sites with minimal facilities, often in isolated locations.

Camping Pods

Camping pods are insulated wooden tents with double glazed windows and French doors, heaters, electricity and sometimes outside decking areas. They range from standard pods sleeping two people to family, super or mega pods sleeping 4 people.

Glamping

Glamping (glamorous camping) involves camping in ready-erected, fully-equipped tents, yurts, tipis and other unusual forms of camping and caravanning accommodation such as geodesic domes, gypsy caravans, retro caravans, safari tents, glamping pods and tree camping. These types of accommodation have proved to be highly popular with more affluent families that want to experience camping holidays but without the hassle of having to bring their own tents and camping equipment.

Youth Hostels

Simple accommodation in private, shared or dormitory rooms with double, single and bunk beds. Most hostels will have a self-catering kitchen. Some also provide meals. More modern hostels may have en-suite family rooms.

Luxury Hostels

Hostels that feature contemporary interior design and offer a higher quality of accommodation

Bunkhouses

Basic self-catering accommodation provided in converted barns. Bedrooms are mainly dormitory-style with bunk beds, but can also include private family rooms. Bunkhouse usually include shared toilets and showers and small kitchens.

Camping Barns

Sometimes known as 'stone tents', Camping Barns vary in facilities ranging from a basic roof over your head to the more luxurious, which include a shower and cooking facilities. Sleeping areas tend to be communal. Typically found on working farms.

Farm Stay

B&B, self-catering, caravanning or camping and glamping accommodation on working farms.

APPENDIX 2

HOTELS & VISITOR ACCOMMODATION BUSINESSES INTERVIEWED

HOTELS IN EPPING FOREST DISTRICT

Hotel	Location	Face to Face/ Telephone Interview
Marriott Waltham Abbey	Waltham Abbey	F
Mulberry House	Ongar	F
Roydon Marina Village Hotel	Roydon	F
Premier Inn Waltham Abbey	Waltham Abbey	T
Premier Inn Loughton/Buckhurst Hill	Buckhurst Hill	T
Travelodge Chigwell	Chigwell	T

HOTELS JUST OUTSIDE EPPING FOREST DISTRICT

Hotel	Location	Face to Face/ Telephone Interview/ Head Office Data
Marriott Cheshunt	Broxbourne	F
Hallmark Hotel London Chigwell Prince Regent	Woodford Bridge	F
Down Hall	Hatfield Heath	F
Park Inn by Radisson	Harlow	F
Best Western Plus Epping Forest	Woodford Green	F
Holiday Inn Express	Harlow	HO
Premier Inn Harlow	Harlow	HO
Travelodge Harlow	Harlow	HO
Premier Inn Chingford	Chingford	HO

INNS IN EPPING FOREST DISTRICT

Inn	Location	Face to Face/ Telephone Interview
The Blue Boar	Abridge	T
Fox Inn	Matching Tye	F
Kings Oak	High Beach	T
The Green Man	Toot Hill	T

GUESTHOUSES AND B&Bs IN EPPING FOREST DISTRICT

Establishment	Location	Face to Face/ Telephone Interview
Diggins Farm Bed and Breakfast	Fyfield	T
The Gate House	Epping	T

SELF-CATERING ACCOMMODATION IN EPPING FOREST DISTRICT

Establishment	Location	Face to Face/ Telephone Interview
Willowside Cottages	Waltham Abbey	T
Mandalay	Epping Green	T
The Ongar Bell	Ongar	T

HOLIDAY LODGE PARKS IN EPPING FOREST DISTRICT

Establishment	Location	Face to Face/ Telephone Interview
Roydon Marina Village	Roydon	F

TOURING CARAVAN & CAMPING SITES IN EPPING FOREST DISTRICT

Site	Location	Face to Face/ Telephone Interview
Debden House Campsite	Loughton	T
Lee Valley Campsite	Sewardstone	F

TOURING CARAVAN & CAMPING SITES JUST OUTSIDE EPPING FOREST DISTRICT

Site	Location	Face to Face/ Telephone Interview
Lee Valley Caravan Park	Dobbs Weir	F
Lee Valley Camping and Caravan Park	Edmonton	F

GROUP & YOUTH ACCOMMODATION IN EPPING FOREST DISTRICT

Establishment	Location	Face to Face/ Telephone Interview
Gilwell Park Scout Activity Centre	Chingford	T
Chigwell Row Campsite & Activity Centre	Chigwell	T
Lambourne End Centre for Outdoor Learning	Lambourne	T

GROUP & YOUTH ACCOMMODATION JUST OUTSIDE EPPING FOREST DISTRICT

Establishment	Location	Face to Face/ Telephone Interview
YHA London Lee Valley	Cheshunt	T

SPECIALIST ACCOMMODATION IN EPPING FOREST DISTRICT

Venue	Location	Face to Face/ Telephone Interview
Gilwell Park Training & Event Centre	Chingford	F

WEDDING VENUES WITH ACCOMMODATION

Venue	Location	Face to Face/ Telephone Interview
Blake Hall	Ongar	T

MARINAS IN EPPING FOREST DISTRICT

Establishment	Location	Face to Face/ Telephone Interview
Roydon Marina Village	Roydon	F

APPENDIX 3

DEMAND DRIVERS INTERVIEWED

Establishment	Location	Face to Face/ Telephone Interview
Attractions		
Lee Valley White Water Centre (Vibrant Partnerships)	Waltham Abbey	F
Epping Ongar Railway	Ongar	T
Nuclear Races	Kelvedon Hatch	T
Wedding Venues		
Blake Hall	Ongar	T
Chigwell Hall	Chigwell	T
Kings Oak	High Beach	T
Colville Hall	White Roding	T
Golf Clubs		
Woolston Manor Golf & Country Club	Chigwell	T
Blakes Golf Club	Ongar	T
Business Demand Drivers		
Public Health England	Harlow	T

APPENDIX 4

VISITOR ACCOMMODATION
DEVELOPER OPERATOR & INVESTOR TESTING
Sampling & Response

COMPANY/CONTACT	RESPONSE	INTEREST
HOTELS		
Accor	Y	Y
Easyhotel	Y	N
Hilton	Y	Y
InterContinental Hotel Group	Y	Y
Premier Inn	Y	Y
Travelodge	Y	Y
PUB ACCOMMODATION		
Cozy Pubs	N	-
Oakman Inns	N	-
Revere	Y	Y
HOLIDAY LODGES/LODGE PARKS		
Forest Holidays	Y	Y
Grand Leisure	Y	Y
Natural Retreats	Y	Y
GLAMPING		
Featherdown	Y	Y
Lanterns & Larks	Y	Y
CARAVAN & CAMPING		
Camping & Caravanning Club	N	-
Caravan & Motorhome Club[5]	Y	Y
YOUTH & GROUP		
PGL	Y	Y
YHA	N	-

[5] Formerly The Caravan Club; interest with conditions

APPENDIX 5

HOTEL SITES ASSESSMENT

The Phase 2 programme of work has included a module to at a high level identify and assess potential sites in Epping, Waltham Abbey and the Buckhurst Hill/Loughton/Chigwell/Debden area that could be considered in the site selection process as possible sites for allocation for hotel development. These have included:

- Large sites that have come forward for residential allocation where a parcel of land could be considered for a hotel or where a hotel could form part of a mixed-use scheme;
- Employment sites identified in the Draft Local Plan being assessed by Arup;
- Additional Council-owned sites that might come forward;
- Sites raised at the Phase 1 study consultation workshop;
- Sites that Premier Inn and Travelodge might have been looking at;
- Sites that the Hotel Solutions team might spot during the site assessment process.

Our starting point has been to approach these locations as a hotel developer would, using the key criteria that they use to identify suitable sites, including the need for sites to be:

- On major routeways with good visibility and prominence from the road, or in town centres;
- Easily accessible from a main road, in both directions;
- With neighbouring uses that might drive business and leisure tourism demand, or in close proximity to the site – offices, business parks, attractions, locations for major events, housing (for VFR markets), wedding/function venues, railway stations;
- A critical mass of population, business infrastructure and services;
- Site size of 1-1.25 acres for low rise free-standing developments (which may be delivered with a pub/restaurant) and smaller sites (from 0.3/0.5 acres) in built-up/urban areas where development can be delivered at height;
- Inclusion in mixed use schemes as an upper floor use, with retail, other commercial, office, residential and student accommodation;
- Building conversions e.g. offices;

- Capacity for at least 50 bedrooms, many averaging 60-80 particularly in the South of England, a function of demand and site/development cost;
- On-site parking or access to reasonably priced public parking in town centres;
- A positive planning framework that will make planning achievable;
- Leasehold opportunities given Premier Inn and Travelodge's strength of covenant and ability to provide guaranteed rental over 25 years;
- Potential for partnerships with landowners and developers, both public and private sector.

Given the large number of sites put forward for allocation (88 residential and 62 employment sites), it has not been possible to view, via desktop or site visit, all of these sites. The first sift has taken off the list those outside the locations of market potential. For those left in the priority locations, limited information is available in terms of e.g. size and ownership, and no contact has been made with landowners or developers during this phase of work, so there could be a number of these which would not be suitable on these grounds. Our approach has been to visit each of the 6 locations of market potential as a hotel site-finder, site spot and then relate this back to the Draft Local Plan site allocations. This has produced a bigger list of potential sites from which we have identified locational hotspots and the strongest sites. We summarise these assessments overleaf and provide a supporting commentary.

Epping

Epping is a strong location and is an identified target for site acquisition for both Premier Inn and Travelodge. Unlike some of the other locations assessed, it is a discrete town with a main through route that becomes the High Street. Whilst there could be opportunities on the fringes of the town, there are clear benefits to a centrally located hotel in terms of supporting the development of Epping's evening economy in terms of generating business for existing and new town centre restaurants, bars and evening entertainment venues e.g. the proposed cinema. Being able to walk to bars, cafes, restaurants and shops from the hotel, as well as being on, visible from, or in close proximity to the High Street, would also be a plus. A town centre budget hotel could however contribute to night-time antisocial behaviour from clubbers staying over after a night out in the town's nightclub, depending on how this is managed.

- Hotspot
  - High Street (B1393) from the EFDC offices to Tesco
- Strongest sites
  - St John's Road Area development site, which includes Epping Forest District Council's Housing Depot site
  - EFDC civic offices
- Second tier sites that would work if the above are not deliverable
  - Cottis Lane Car Park
  - Bakers Lane Car Park
  - Epping London Underground station car park
  - The old police station (for a small boutique hotel/gastropub with boutique bedrooms – size and parking not known).

Waltham Abbey

Waltham Abbey differs from Epping in that the main routes serving the town (A121/B194) go around rather than through the centre with development also in place or proposed in out of centre locations. Access to the M25 at Junction 26 also makes some of these out of centre sites very strategic locations for more footloose business. There is already established budget hotel use out of centre with the Premier Inn on Sewardstone Road (A112) which is a large hotel trading very strongly. The town centre is also quite tight and congested, making it difficult to secure a site of any size with parking.

- Hotspots
    - Crooked Mile/Abbey View
    - J26 and A121 south of the town
- Strongest sites
    - Out of centre
        - Skillet Hill farm, J26, M25
        - Site put forward in the Strategic Land Availability Assessment for employment (SR0061B) south of the M25
        - A121/A112 roundabout – would be a strong location as out of town but closer to employment and residential and town than J26; possibly a frontage site at Gunpowder Park or in NE quadrant
    - Town centre
        - Saxon Way Community Centre (0.44ha)
        - Fire station, Sewardstone Rd (0.64ha)
        - Town Mead Sports Complex (open space but at one time proposed for residential)
- Second tier sites
    - Lee Valley Nursery, Crooked Mile (a bit off pitch – might work for a pub with lodge if a frontage site available).

Debden

Debden is a very strategic location in relation to the M11, J5 – though a limitation is it currently has only a southbound connection. Nonetheless there is the sense of a 'gateway' role to be played here in relation to the M11 junction and the London Underground station, and the development brief envisages a considerable intensification of development for mixed uses with leisure a potential use particularly alongside residential and retail, but also with intensified employment uses between the station and the M11. There are some major corporate companies here including the headquarters of Higgins and the Bank of England print works. A hotel could have a role to play in the mix here as an upper floor use, but ideally on a site with frontage to/visible from the A1168 Rectory/Chigwell Lane. Debden is not identified as a target location in its own right on the targets of the budget hotel companies, but is perceived as an area of opportunity that merges with Loughton, Chigwell and Buckhurst Hill.

- Hotspots
  - J5, M11 junction to Epping Forest College
- Strongest sites
  - Sainsburys/BP (the only site with frontage to the A1168)
  - London Underground station car park and Loughton Self-Drive on approach to station (TFL)
- Second tier sites
  - Epping Forest College sports field, Borders Lane (corner site as close as possible to the main road).

Loughton

Loughton sits to the west and south of Debden. Debden and Loughton in effect run into one another, with Loughton being the predominant centre, but Debden having the gateway position in relation to the M11 and adjacent tube station. The predominant routeway around Loughton is the A121 High Rd/Church Hill (the former extending down to Buckhurst Hill). This road and the station are key focal points around the town.

- Hotspots
  - A121 from A1168 to B170 (Buckhurst Hill)
- Strongest sites
  - Loughton Library/Leisure Centre car park
  - Loughton London Underground station car park – bus station/superstore hub.

Buckhurst Hill

Located to the south of Loughton and west of Chigwell and the M11, Buckhurst Hill is already an established location for a budget hotel with the Premier Inn Loughton/Buckhurst Hill well established here. It is very tightly developed and congested leaving little room for development of scale and associated car parking. The sites proposed for allocation are small.

- Hotspots
  - Sites along or in close proximity to the A121/B170
- Strongest sites
  - Lower Queens Road car park (hotel as upper floor use)
  - Land adjacent to David Lloyd Leisure/Guru Gobind Singh Khalsa College

Chigwell

Chigwell sits to the east of Buckhurst Hill and the M11, linked by the B170 to Buckhurst Hill and the A113 to Debden and J5 of the M11. Chigwell is an established budget hotel location with a Travelodge on the A113 High Road. The A113 runs through the town NE/SW. There are a number of sites fronting this road that would offer potential for a budget hotel, but also potential for other uses. At the time of reporting there were several proposed employment sites off this road and linking through to Buckhurst Hill being evaluated.

- Hotspots
    - A113 through to the junction with the A1168
- Strongest sites
    - Chigwell Convent (frontage site/visibility)
    - Chigwell Nurseries (ditto)
    - Beis Shammai School
    - Chigwell Golf Course

APPENDIX 6

EXAMPLES OF APPROACHES TO HOTEL SITE ALLOCATION

Hotel solutions has worked with local authorities in a number of other areas where high land and property values and strong demand from high value alternative uses, especially residential, has made securing sites for hotel development a major challenge. Site allocation is a route we have recommended in such circumstances, though this is not recommended lightly, as clearly it intervenes in the dynamics of the property market, and also, where there is existing supply, the hotel market. As part of the research for this study we were asked to look at examples of allocation for hotel use to see where this has been successfully applied elsewhere and to see what lessons could be learned from this. Hotel Solutions therefore made contact with previous clients that had faced similar issues and where hotel site allocation had been recommended; their responses are summarised below:

Bath

Bath has allocated two sites for hotel development in its Placemaking Plan, the more detailed document that puts into effect the Core Strategy. Our 2009 report informed the Core Strategy and our 2014 report informed the Placemaking Plan. The Placemaking Plan is still with the inspector but her interim findings maintain the land use requirements for hotels on two allocated sites. Originally there were to be three allocations for hotel, but Bath Quays North has now been prioritised for employment complemented by residential. The pressures for office floorspace and residential means that these two uses have been prioritised over uses such as a hotel and also student accommodation. The plan anticipates that hotels may come forward also on windfall sites, so in allocating they are seen to be trying to guarantee the delivery of a minimum amount of hotel bedspaces, but not catering for all the demand forecasted.

Cambridge

Cambridge has a hotel policy that identifies hotel use as part of mixed use schemes in 4 locations – Mill Lane, Parkers Piece, Cambridge Station and NE Cambridge Station, as well as identifying hotels as a supported use within major developments at Addenbrookes Bio-Medical Campus and the new University Campus at NW Cambridge. The draft plan is currently with the inspector and we understand that the hotel policy hasn't been examined yet. The hotel at Addenbrookes has come forward – a Crowne Plaza 4 star hotel is to be developed here, and a new 4 star hotel has recently opened at Cambridge Station. The Mill Lane site was an earlier allocation for a hotel within a mixed-use scheme that hasn't yet been taken up, as none of the site has yet been developed. The site is complicated in terms of ownership and technical/ environmental considerations, but it is anticipated that it will come forward, and our research found interest for a boutique hotel of 70-80 rooms in a central/riverside location. Our report (2012) however also suggested allocation of a site/property for a 5 star hotel, for which there were few suitable opportunities, particularly in terms of buildings of character. The Shire Hall was the suggested site. This doesn't seem to have been taken forward, though the supporting text for the hotel policy acknowledges the need for a 5 star/high quality hotel.

Horsham

The Horsham Hotel Futures Study is relatively recent (March 2016), and its findings are being taken forward through the Town Centre Vision, including recommendations in relation to key sites. An accelerated review of the District Planning Framework is to take place in the next 3 years to reflect and support the Town Centre Vision, which the senior planning officer indicated should include allocations for hotels in the town centre.

Other Locations

Feedback from Travelodge, Premier Inn and their planning consultants gave examples of hotels coming forward on sites allocated in more detailed planning documents - Town Centre Action Plans, Masterplans, Development Briefs and SPDs (Rochester and Bromley). Northampton is another destination that Hotel Solutions has worked in where hotels were identified on key sites in the Town Centre AAP – Premier Inn has developed on one of those, other sites are still being marketed and considered for mixed uses that could include a hotel, but one has been developed for alternative uses.

APPENDIX 7

PUBLIC SECTOR FUNDING OF UK HOTEL DEVELOPMENT SCHEMES

1. Introduction

Public sector funding in one form or other is increasingly being used to support hotel development schemes across the UK in terms of:

- Local authority borrowing at preferential rates;
- Growth fund grants;
- Heritage grants for the conversion of historic buildings to hotels;
- Local authority freehold purchase of a building for hotel conversion;
- The contribution of local authority owned land or properties for hotel development;
- Local authority partnerships with universities.

Such public sector investment in hotel schemes is being justified in terms of:

- Finding a new use for a redundant building;
- Enabling a strategically important hotel that cannot secure bank finance to proceed;
- Kick starting and enabling key regeneration schemes that include a hotel as a component;
- Generating an income stream for a local authority at no cost to the tax payer;
- Helping to boost tourism growth;
- Job creation.

Examples of these types of public sector funding of hotel projects are given in the following paragraphs.

2. Local Authority Borrowing at Preferential Interest Rates

A number of local authorities across England have used their prudential borrowing powers to take our preferential rate loans to help fund hotel schemes, typically entering into a lease arrangement with a hotel operating company to generate a rental income to repay the loan and in some cases generate a surplus profit for the authority. This has enabled a number of hotel schemes that have been unable to secure commercial funding to go ahead, at no cost to Council tax payers and in some cases giving an investment return to the council. Examples are as follows:

Travelodge Partnerships with Local Authorities

Travelodge has been working in partnership with a number of local authorities to develop new hotels with funding from low interest government loans from the Treasury through the Public Works Loans Board. The hotels are built on local authority land and leased to Travelodge on a 25-year term, with the councils repaying the debt using the rental income from Travelodge and any other tenants. Travelodges have so far been developed using this mechanism in Eastleigh, Aylesbury, Bicester, Thetford and Redhill. When complete the local authority can choose whether to retain ownership of the hotel or to sell it with Travelodge as the operator.

Pullman Hotel, Liverpool

Liverpool City Council funded the £66m Exhibition Centre Liverpool and Pullman Hotel adjacent to the Liverpool Arena and Convention Centre (ACC Liverpool) on Liverpool's waterfront, through borrowing that will be supported directly from the revenue generated by the expanded ACC Liverpool campus. The scheme has thus been funded at no cost to tax payers. The hotel has 216 bedrooms and is of an upscale 4 star standard. It acts as the headquarters hotel for conferences and exhibitions taking place at convention and exhibition centres. Exhibition Centre Liverpool is one of Mayor Anderson's priority projects. Having an on-site 4 star hotel was seen as critical to its success. After initial investigations to find a private sector partner to fund and develop the hotel failed the City Council decided to fund the hotel directly itself alongside its funding of the exhibition centre. The hotel is wholly owned by the City Council and operated under management contract by Branded Hotel Management through a franchise agreement with Accor Hotels.

Crowne Plaza Newcastle

Newcastle City Council borrowed £30m to help fund the development of the 250-bedroom 4 star Crowne Plaza hotel as part of the first phase of the Stephenson Quarter business district scheme in Newcastle city centre. This is a key regeneration project that the City Council sees as being of vital importance to the future development of Newcastle. The developers, Silverlink Holdings (now renamed as the Coulston Group) had secured commercial backing for other elements of the scheme but were unable to secure a loan for the hotel as the banks were reluctant to fund this type of use. With the hotel being a key element of the scheme, the City Council stepped in to borrow the money to help progress the hotel. It lent a large slice of the money that it borrowed to the developer to fund the construction of the hotel. The Council will use the rest of the money to buy plots of land near the hotel and kick-start work on buildings that will be sold on at commercial rates. The hotel opened in July 2015. It is operated under management contract by the InterContinental Hotels Group (IHG). The hotel has added a major new business conferencing and banqueting facility to the city. Its main conferencing suite seats and caters for around 400 people. The hotel also offers eight adaptable meeting rooms that can accommodate small seminars of 12 people up to large private meetings of 32 and meetings of 100. Combining the large conference suites and meeting rooms, the hotel can provide more space to become an ideal venue for exhibitions.

Hilton Ageas Bowl, Hampshire

Eastleigh Borough Council purchased the 175-bedroom, 4 star Hilton hotel at the Ageas Bowl cricket ground near Southampton, home of Hampshire County Cricket Club. In a deal signed in 2012, the Council agreed to pay £27.5m for the completed hotel to enable it to go ahead. Its construction was funded by Omni Capital. The investment has required the Council to take out a loan, which will be repaid with the revenue from the hotel. The Leader of the Borough Council, Cllr Keith House, has consistently said that the surplus income, particularly in the longer-term once the loan has been cleared, will be used to keep Council Tax down.

Lancashire County Cricket Club 4 Star Hotel

The Greater Manchester Combined Authority and Trafford Metropolitan Borough Council stepped in to help bridge the funding gap for a proposed 150-bedroom 4 star hotel at Lancashire County Cricket Club's Emirates Old Trafford ground after the club failed to secure a bank loan for the project. A meeting of the Combined Authority in February 2015 agreed a loan of £5m towards the £12m hotel from the Greater Manchester Growth and Growing Places Funds, while Trafford Metropolitan Borough Council agreed to a loan of £4m in March 2015. The Cricket Club turned to these public sector bodies after being turned down for funding by its bank. The Club had also rejected an offer of a loan from the Greater Manchester Pension Fund because the level of fees and proposed interest rate of 9% could not be supported by the hotel scheme. Trafford Council will borrow the £4m from the Public Works Loan Board resulting in an annual interest cost of £106,000. The Cricket Club will pay the Council £221,000 over the loan period, leading to a net profit for the Council of £115,000.

Stockport Exchange

Stockport Council has used its prudential borrowing powers to access an £18.5m preferential rate loan to forward fund the construction of a 115-bedroom Holiday Inn Express hotel and 50,000 sq ft office building as the second phase of the Stockport Exchange mixed-use development scheme in Stockport town centre in conjunction with its development partner Muse Developments. The Council bought the 10.4 acre site in January 2011. The first phase of the development, which included highways improvements and a 1,000 space multi-storey car park was completed in 2014. The Council saw the scheme as being crucial to the success of Stockport town centre. It took the decision to use its preferential rates of borrowing to kick start phase 2 and attract further investment at a time when commercial funding was proving difficult to secure. The income generated will cover the cost of the loan. The Council has done extensive research and financial modelling to ensure its financing of the hotel and office development will be at no extra cost to the Council Tax payer.

3. Grants for Hotel Projects

Grants from the European Regional Development Fund (ERDF), UK Government Growing Places Fund and Regional Growth Fund, and individual local authorities have helped to fund a number of hotel schemes across the UK. Heritage Lottery Fund grants have also been secured to support the conversion of a number of historic buildings into hotels. Examples of grant schemes and grant assisted hotel projects are as follows

Titanic Hotel, Liverpool

Liverpool City Council provided a £5.5m grant from the Regional Growth Fund to enable developers Harcourt to progress the conversion of the North Warehouse at Stanley Dock in north Liverpool into a 150-suite 4-star hotel at a cost of £30m. The project is part of the first phase of a £130m plan to regenerate the entire Stanley Dock site. The regeneration of north Liverpool is a key priority for the city's Mayor. The City Council decided that investment in the hotel was justified as a statement of confidence in the area, a means of finding a new use for a building that had been derelict for many years, and in terms of the new jobs that it has created. The hotel has also benefitted from BPRA. It opened in June 2014.

Premier Inn Blackburn

A 60-bedroom Premier Inn budget hotel opened in November 2015 as part of the £25 million Blackburn Cathedral Quarter development in Blackburn town centre, Lancashire. The scheme also includes an office block, restaurants, shops, a new bus interchange and housing for Cathedral staff. It has been funded by the Homes and Communities Agency (£4.75m), European Regional Development Fund (£3.6m), Blackburn with Darwen Council (£3.8m), Blackburn Cathedral (£1.7m), Lancashire LEP's Growing Places Fund (£3.9m) and commercial developer Maple Grove (£7.8m).

Hampton by Hilton Humberside Airport

North Lincolnshire Council is part funding the development of a £7m, 103-bedroom Hampton by Hilton hotel at Humberside Airport through a Regional Growth Fund grant. The hotel is being developed by regional hotel operator Nightel, who will operate it under a franchise agreement with Hilton Worldwide. It is due to open in mid-2017. The Council has supported the development of the hotel on the basis of the contribution it will make to the development of the airport, the continuing expansion of the offshore oil, gas and renewable energy sectors and the new jobs that it will create.

Belfast Titanic Hotel

The derelict office building in which RMS Titanic was designed is to be developed into an 84-bedroom 4 star hotel thanks to a £4.9m grant from the Heritage Lottery Fund. The Titanic Foundation will use the grant to restore the B+ listed Harland and Wolff headquarters building on Queen's Island, Belfast, which has been vacant since 1989. The grant has been awarded through HLF's Heritage Enterprise programme. It is designed to help when the cost of repairing an historic building is so high that restoration is not commercially viable. Grants of £100k to £5million bridge the financial gap, funding the vital repairs and conservation work needed to convert derelict, vacant buildings into new, usable commercial spaces that can have a positive impact on local economies.

Buxton Crescent Hotel

The £46m redevelopment of the former St Ann's Hotel in Buxton's Grade I listed Georgian Crescent into a 79-bedroom, 5 star hotel incorporating the neighbouring natural baths into a state-of-the-art thermal natural mineral water spa, is currently being progressed with funding support from a variety of public sector sources, including the Heritage Lottery Fund (£23.8m), English Heritage (£0.5m), Derbyshire County Council (£2.7m), High Peak Borough Council (£2m) and D2N2 LEP (£2m). The developers, the Trevor Osborne Property Group, are contributing £15m. The project first commenced 10 years ago, but stalled after £5m of funding from the East Midlands Development Agency (EMDA) was withdrawn with the demise of the agency in 2011. The delay caused by losing the EMDA funding meant that because of the financial climate at the time the developers were unable to borrow the amount that they needed from the banks. Given the importance of the project to Buxton and the rest of Derbyshire the County Council stepped in with a loan to help bridge the funding gap. Further funding was also secured from the D2N2 LEP and HLF awarded an additional £11.3 m for the completion of the project in November 2014. Construction has now restarted with the hotel due to open in 2018. It is projected to generate an additional annual contribution of £4m into Buxton's visitor economy.

4. Local Authority Freehold Purchase

Aloft Liverpool

Liverpool City Council facilitated the conversion of the historic Royal Insurance building in Liverpool city centre into a 116-bedroom Aloft budget boutique hotel by purchasing the freehold of the building for £1.95 million. This unlocked £18million of private sector investment in the project, which has been progressed by Runcorn-based developer Ashall Property. The City Council was keen to bring this landmark building back into use. It had been unoccupied for 20 years and was on the National Buildings at Risk Register. English Heritage also supported the scheme with a grant of £297,500. The hotel opened in November 2014. It is operated by BDL Management under a franchise agreement with Starwood Hotels & Resorts Worldwide.

5. Hotel Development by Local Authority Development Vehicles

Amble Hotel

Northumberland County Council's wholly owned regeneration company, Arch, is planning to build a new 30-bedroom hotel with a 150-cover restaurant on an undeveloped site within Coquet Enterprise Park at Amble. The £4m hotel is seen as strategically important to help revitalise the town.