

## **Hotels and Tourist Hostels Survey 2004/2005**

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### **Introduction**

Tourism is one of Britain's major industries, generating both wealth and employment. It is estimated that in 2003, 17 million tourists spent an estimated 2 billion pounds in the Royal Borough and tourist accommodation accounted for 1445 million of this.

Although primarily a residential borough and covering less than 1% of the total area of London, Kensington and Chelsea makes a substantial contribution to the stock of accommodation for visitors in London. The London Tourist Board (LTB) found in 1995 that the Royal Borough had 15% of all known serviced establishments and 17% of all bedspaces in London. Clearly tourism and tourist accommodation has a significant role to play in the Royal Borough and the continuing role of London as a capital city.

The Council has periodically undertaken surveys to establish the number and location of hotels and tourist hostels located within the Borough<sup>1</sup>. In view of the need to review existing planning policies on hotels and tourist accommodation as part of the preparation of the Council's Local Development Framework, the Council has undertaken a new survey of hotel and tourist hostel accommodation in the Borough.

The survey aims to:

- Update data held on the number and location of hotels and tourist hostels located within the Borough;
- Analyse existing levels of provision against data obtained from previous surveys and an analysis of past planning decisions to identify any changes in provision;
- Assist in the identification of areas of concentration of hotels and tourist hostels;
- Provide a robust dataset for the review of policies contained within the Hotels chapter of the Council's Unitary Development Plan (UDP)

### **Definitions Used for Hotels and Tourist Hostels**

#### ***Hotel***

Throughout the report, the term 'hotel' is used to include all hotels, guest houses, apart-hotels, bed and breakfast accommodation and other similar tourist accommodation, including tourist hostels.

Statutory Instrument 2005/84 has amended the Town and Country Planning Use Classes Order 1987 and the accompanying Circular provides a guide to the interpretation of the amended Order. Premises which provide a room as temporary accommodation on a commercial, fee-paying basis, where meals can be provided but where residential care is not provided are included within the Class C1: Hotels definition of the Use Classes Order and therefore fall within the remit of this survey.

#### ***Tourist Hostels***

The UDP definition of hostels acknowledges that there are many kinds of hostel use but the policies of the plan distinguish between the two main types: tourist hostels and residential hostels. Tourist hostels are defined as normally providing short stay accommodation for those whose normal residence is elsewhere which are for

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<sup>1</sup> Previous surveys were conducted in 1992, 1996 and 2000.

holidays or short stays and are sometimes open to the public. They resemble hotels except that the accommodation is usually of a lower standard.

Circular 03/2005 states that the question of whether a premises is a hostel or another use is a matter of judgement to be determined on a fact and degree basis. It is recognised that some tourist hostels have dormitory accommodation and/or communal or shared facilities and may cater specifically towards the younger end of the tourist market. However, the fact that they cater for short stay tourist accommodation with no element of care means that they can be clearly distinguished from other hostel type uses and on this basis it is considered that they warrant inclusion within the survey.

Previously tourist hostels have been surveyed as part of a survey which covered all types of hostels. However for the purposes of updating information on the distribution of tourist accommodation within the Borough, they have been included within the remit of this survey.

### ***Holiday Letting, Serviced Apartments, Timeshare Accommodation and Student Halls of Residence***

Other sources of temporary sleeping accommodation which caters for tourists are premises used as serviced apartments, holiday lettings and time share schemes.

Holiday letting is defined within the glossary of the UDP as a dwelling occupied for the purposes of holiday accommodation by persons whose permanent homes are outside the Borough. However, for the purposes of this study this type of accommodation is not considered to fall within the Class C1: Hotels definition of the Use Classes Order and for this reason, have not been included within the remit of this survey.

Serviced apartments and timeshares are normally booked in advance and generally cater for longer stays in excess of one night, often for periods of a month or more. The characteristics which define a hotel use such as the ability to secure a bed at short notice, a high turnover of guests and the provision of accommodation serviced on a daily basis are not normally present and therefore the character and amenity issues raised by these type of premises are fundamentally different. On this basis they are considered to fall outside the remit of this study.

Student halls of residence which offer accommodation over the summer months have also not been included as their primary purpose is the provision of student accommodation.

### **Survey Methodology**

Several data sources were used to assist in the identification of all the hotels and tourist hostels currently located within the Borough:

Results from the 2000 hotel survey were examined to identify the hotels in operation at that time. Site visits were made to each of the hotels to ascertain if they were still operational and whether they fell within the remit of the latest survey.

New or hotels not previously surveyed were identified using the following sources:

- the Thompson's Local telephone directory;
- the Yellow Pages;

- the Kensington and Bayswater Capital Directory;
- the Orange Zone Business Directory;
- the Business and Service Directory published by the Council (1994); and
- an internet search of websites offering hotel accommodation in the Borough.

A review of planning applications was also undertaken to identify any new hotels that had been granted planning permission since the previous survey.

The location of each hotel or tourist hostel was plotted using a Geographical Information System which enabled double entries to be identified - such as where the name of the premises had changed or there was more than one entrance to the premises located on different streets.

A new survey form was designed which requested the following information:

- the type of accommodation;
- the number of bedrooms and bedspaces;
- the facilities within the establishment;
- whether the premises had a star rating;
- whether part of the establishment was vacant or under refurbishment; and
- whether any annexes were used to accommodate staff or guests.

Such information was similar to that collated from previous surveys although new questions on the type of facilities provided by each premises were included in the survey form.

Survey forms were sent out with a covering letter and a pre-paid envelope on the 1<sup>st</sup> September 2004 with a requested deadline of 17<sup>th</sup> September. Following this date, a second letter was sent to those premises which had not replied giving a further response time of 11<sup>th</sup> October 2004. Two further reminder letters were subsequently sent to those premises who had yet to respond followed by telephone calls where appropriate.

Where the survey form was returned to the Council but with incomplete information, site visits and telephone interviews were undertaken to the premises to help provide complete and accurate information on each of the premises.

A response was received from all but one of the premises identified for inclusion within the survey.

## **Survey Results**

Results obtained from the survey are now analysed with hotels and tourist hostels being considered separately.

## Hotels

### **Number of Hotels and Bedspaces**

The 2004/2005 survey shows a total of 191 hotel establishments containing 30,858 bedspaces.

A comparison of hotel bedspaces and the number of hotel establishments using data collected from previous surveys is shown in the following table. Note that only those wards containing hotel accommodation are shown.

**Table One: Number of Hotels and Bedspaces Located in the Borough in 1992, 1996 and 2004**

WARD	1992		1996		2004	
	No. of Hotels	No. of Bed-spaces	No. of Hotels	No. of Bed-spaces	No. of Hotels	No. of Bed-spaces
Abingdon	17	2,063	14	2,084	12	2,349
Brompton	15	1,442	12	1,357	25	4,033
Campden	6	854	4	802	5	2,212
Cheyne (a)	1	38	2	67	-	-
Church (b)	0	0	1	88	-	-
Courtfield	27	6,763	24	7,241	29	4,904
Earl's Court	62	4,414	62	4,300	55	4,847
Hans Town	15	2,478	16	2,368	11	956
Holland	20	2,540	19	2,589	10	1,218
North Stanley (c)	1	30	0	0	-	-
Pembridge	14	1,032	11	670	11	809
Queen's Gate	22	5,283	18	5,238	22	8,011
Redcliffe	4	141	4	154	5	1,369
Royal Hospital	9	579	9	565	3	81
South Stanley (d)	1	43	0	0	-	-
Norland	0	0	0	0	1	14
Cremorne	0	0	0	0	1	25
Stanley	-	-	-	-	1	42
<b>Borough Total</b>	<b>214</b>	<b>27,700</b>	<b>196</b>	<b>27,523</b>	<b>191</b>	<b>30,870</b>

- (a) Cheyne ward was absorbed by Royal Hospital and Cremorne wards in the ward boundary changes in February 2002.
- (b) Church ward was absorbed by Stanley, Hans Town and Brompton wards in the 2002 boundary changes.
- (c) North Stanley ward was absorbed by Stanley ward in the 2002 boundary changes.
- (d) South Stanley ward was absorbed by Cremorne ward in the 2002 boundary changes.

Table One shows that between 1992 and 2004 the number of hotels has shown a continuing decline. The results from the 2000 Survey (not shown in the table as no analysis was undertaken by ward) showed an apparent increase in the number of hotels to 218 premises. This result should be treated with caution - the 2004/2005 survey went to great lengths to identify all existing hotel premises located within the Borough. The analysis of hotel related planning decisions discussed below confirms that there has not been a significant rise in the number of applications for new hotels between 1996 and 2000 so the results from the 2000 survey appear to be inaccurate.

Despite the reduction in the number of establishments since 1996 there has been a modest rise in the number of bedspaces (an increase of 11%) from 1996 to 2004. This can be accounted for by additional bedspaces being provided through extensions to existing hotels and a more recent trend towards the amalgamation of smaller hotels to create larger establishments aimed at the upper end of the market. A number of premises have also been refurbished as “aparthotels” providing short let tourist apartments.

### ***The Distribution Of Hotels By Ward***

Analysis of the geographical distribution of hotel premises highlights some interesting patterns of distribution.

Earls Court ward contains the heaviest concentration of hotels (55 establishments) with Queen’s Gate ward containing the largest number of bedspaces in the Borough (8,011).

The largest growth has been seen in Brompton ward with an increase of 2,676 bedspaces or 66% since the 1996 survey. Queen’s Gate ward has also seen significant growth with an increase of 2,773 bedspaces (35 %) since 1996. Increases in the number of hotel premises has also taken place in the Brompton and Queen Gate wards.

By contrast Hans Town ward has seen a loss in the number of establishments from 16 to 11 and a significant loss of 1412 bedspaces.

These results must be treated with some caution because of the ward boundary changes that took place in 2002. The boundary changes increased the size of Brompton ward by absorbing part of Hans Town ward, which also absorbed part of Royal Hospital ward. Cheyne ward became part of Royal Hospital and Cremorne wards and Church and the Stanley wards were deleted. On this basis there has been some redistribution of the hotel accommodation into different administrative boundaries. Whilst this may account for some of the growth particularly within Queen’s Gate ward, it is interesting to note that the number of premises in the ward has remained constant since 1992 which, even allowing for the redistribution of bedspaces with Hans Town ward, indicates that there has been growth in the number of bedspaces. With regard to Brompton ward, part of the growth in the number of premises and bedspaces is more likely to be explained by the boundary changes with other wards, particularly the absorption of Hans Town ward

In terms of the balance of hotel accommodation in the Borough as a whole the results show a concentration in the wards located to the south of the Cromwell and West Cromwell Roads and in Queen’s Gate ward itself. The relatively high number of bedspaces in Campden ward measured against the small number of premises is accounted for by two large establishments - the Royal Garden Hotel in Kensington High Street and the Hilton London Kensington in Holland Park Avenue which between them account for approximately 2000 bedspaces.

By contrast, Holland and Royal Hospital wards have shown a significant decrease in the number of establishments and bedspaces since 1996. Holland ward has shown a loss of 1,371 bedspaces (a 47% decrease) since 1996 and Royal Hospital ward has lost 484 bedspaces (a 85% decrease).

The wards to the south of Kensington High Street, namely Abingdon, Earl's Court, Brompton and Redcliffe, which historically have catered for the majority of visitor accommodation in the Borough have generally shown a modest increase in the number of bedspaces and a consolidation of the existing visitor accommodation. By contrast Courtfield ward has shown a decrease of 2337 bedspaces since 1996, but the number of establishments has slightly increased.

The situation in the south of the Borough (area to the south of the Fulham Road) which comprises of Stanley, Hans Town, Cremorne and Royal Hospital wards is generally one of a decline in the number of establishments and bedspaces that are available. Hans Town and Royal Hospital wards in particular showing a significant reduction.

### ***Hotel Provision in the Borough's Principal Shopping Centres***

The UDP identifies Principal Shopping Centres which are the Borough's main shopping centres offering both comparison and convenience shopping. Only 6% of the existing hotel stock within the Borough is located within a Principal Shopping Centre location and 7% of the bedspaces as the following table illustrates.

The vast majority of hotels are sited in residential roads predominantly in property that was constructed for residential purposes.

**Table Two: Hotels Located Within the Borough's Principal Shopping Centres (PSC)**

<b>WARD</b>	<b>No. of Hotels within PSC</b>	<b>No. of bedspaces within PSC</b>	<b>No. of Hotels outside a PSC</b>	<b>No. of bedspaces outside a PSC</b>
Abingdon	0	0	12	2349
Brompton	3	518	22	3515
Campden	1	1194	4	1018
Stanley	0	0	1	42
Courtfield	1	390	28	4514
Earls Court	0	0	55	4847
Hans Town	0	0	11	956
Holland	0	0	10	1218
Pembridge	0	0	11	809
Queen's Gate	0	0	22	8011
Redcliffe	0	0	5	1369
Royal Hospital	0	0	3	81
Norland	0	0	1	14
Cremorne	0	0	1	25
<b>Borough Total</b>	<b>5</b>	<b>2102</b>	<b>206</b>	<b>28768</b>

### ***Quality of Hotel Accommodation***

From mid 1999 the Automobile Association (AA), the Royal Automobile Association (RAC) and the English Tourism Council agreed on a standardised rating scheme that would apply to members of these organisations. They devised the 'star' rating which generally applies to larger establishments such as hotels and the 'diamond'

rating which covers guest houses and bed and breakfast establishments that offer more limited facilities than hotels and are typically smaller, often family run establishments and do not offer an evening meal.

Both the star and diamond rating systems are rated on a scale of 1 to 5 with the 1 star category indicating accommodation with a limited range of facilities and services to 5 star category which indicates more luxurious establishments of a higher quality.

The 2004/2005 survey questionnaire included questions on the number and types of facilities provided by an establishment and whether it has been awarded a star rating. Whilst the quality of accommodation cannot be controlled directly by the planning system, the location of an establishment and the consequent effect on land value may have an effect on the quality of the accommodation being offered. The more prestigious hotels at the top end of the market are more likely to be found in areas where land values are the highest such as town centre locations and areas of good transport accessibility.

The response to the question of whether there was a star or diamond rating was not comprehensively answered so the results must be treated with caution. Additionally, some of the ratings may be out of date in so far as the award may have been gained some years ago and the quality rating system involves a fee being paid and some establishments may have chosen not to take part in the scheme. However, a large number of properties without a quality rating may be an indication that accommodation offered is aimed towards the lower end of the market.

**Table Three - Hotel Quality Rating by Ward**

<b>WARD</b>	<b>No. of Hotels</b>	<b>No. of Hotels with * rating.</b>	<b>1*</b>	<b>2*</b>	<b>3*</b>	<b>4*</b>	<b>5*</b>
Abingdon	14	7	0	4	2	1	0
Brompton	25	22	0	0	2	13	7
Campden	5	2	0	0	0	1	1
Courtfield	32	13	0	2	4	6	1
Earl's Court	55	26	0	11	12	3	0
Hans Town	11	9	0	0	1	6	2
Holland	12	5	0	1	3	1	0
Stanley	1	1	0	0	0	1	0
Pembridge	12	2	0	0	0	2	0
Queen's Gate	23	20	0	1	2	14	3
Redcliffe	6	3	0	0	1	1	1
Royal Hospital	3	2	0	1	0	1	0
Norland	1	1	0	0	1	0	0
Cremorne	1	0	0	0	0	0	0

It can be seen that Brompton and Queen's Gate wards have a higher proportion of premises which offer accommodation at the top end of the market. Of the 20 premises that have a quality rating in Queen's Gate ward, 17 of these offer 4 or 5 star accommodation or equivalent. In Brompton ward of the 22 premises which have a quality rating, 20 offer 4 or 5 star accommodation.

This can be contrasted with premises in the Earl's Court ward where over half the premises have no quality rating and of the 26 premises that do offer a rating only three offer 4 star (or equivalent) accommodation and there are no premises within

the 5 star range. Over half of the properties in Courtfield ward also have no quality rating. Pembridge ward also appears to offer hotel accommodation at the lower end of the market with only 2 of the 12 hotels in that ward having a quality rating.

### ***Hotel Facilities***

The survey questionnaire also requested information on the type of facilities available in the hotel. The hotels aimed at the top of the market often offer a wide range of facilities such as a restaurant, conference facilities, swimming pool/gymnasium and private function rooms. The presence of these facilities normally gives an indication of the quality of the hotel. The availability of facilities is shown in Table Four.

Of the 55 establishments located in Earl's Court ward it can be seen that 30 only offer basic facilities which would comprise of a bed and possibly a shared bathroom/toilet. No other facilities such as a bar, function room or restaurant would be offered. A similar picture emerges in Courtfield ward where 12 of the 29 establishments offer only basic facilities. This can be contrasted with Brompton ward where only 4 of the 25 establishments offer a basic level of service or Queen's Gate ward where 5 of the 22 properties offer a basic service. These wards also score highly with regard to the number of facilities that are offered, a further indication that most of the accommodation is likely to be at the top end of the market. In Pembridge ward, the low number of premises who have adopted a quality rating can be contrasted with the high proportion (10 of the 12 premises) which offer more than the basic level of facilities with a bar and restaurant being the most popular.



**Table Four – Facilities Provided By Hotels**

Ward	No. of Hotels	No. of Hotels with Facilities	Facilities								Grand total of facilities
			Bar	Restaurant	Conference facilities	Bureaux de Change	Banqueting provision	Private function rooms	Casino/Gaming room	Swimming pool/Gymnasium	
<b>Abingdon</b>	12	8	7	5	3	0	1	3	0	2	21
<b>Brompton</b>	25	21	19	12	13	10	10	14	0	5	83
<b>Campden</b>	5	4	3	4	3	2	3	3	2	3	23
<b>Courtfield</b>	29	17	11	14	10	3	7	10	0	4	59
<b>Earl's Court</b>	55	25	12	16	4	2	0	1	1	1	37
<b>Hans Town</b>	11	9	8	5	9	1	5	9	0	3	40
<b>Holland</b>	10	4	1	2	1	0	1	1	0	1	3
<b>Stanley</b>	1	1	1	1	1	1	0	1	0	0	1
<b>Pembridge</b>	11	9	9	4	2	0	0	2	0	0	18
<b>Queen's Gate</b>	22	17	17	16	11	5	12	10	0	6	81
<b>Redcliffe</b>	5	2	2	2	1	1	1	1	0	0	9
<b>Royal Hospital</b>	3	0	0	0	0	0	0	0	0	0	0
<b>Norland</b>	1	0	0	0	0	0	0	0	0	0	0
<b>Cremerne</b>	1	0	0	0	0	0	0	0	0	0	0



### ***Vacant or Refurbishment of Hotel Premises***

The refurbishment of hotel premises may provide an indicator of the buoyancy of the tourist accommodation market as refurbishment may show that money is being invested and therefore confidence is strong. In a similar manner the vacancy of part a premises may indicate the health of a business. However, such scenarios should be treated when making assumptions based on any results highlighted by the survey.

Only two hotels were undergoing refurbishments at the time of the survey – one located in Abingdon ward and one in Earl's Court ward. There were no hotels which were partly vacant. It is therefore difficult to draw any specific conclusions based on such a limited sample size.

### ***Hotel Annexes***

Information on hotel annexes can be useful in so far as it can provide information regarding the provision of staff accommodation or whether part of the hotel occupies a different site to the postal address. The following table shows the number of hotels with annexes in the Borough

**Table Five – Hotels With Annexes**

<b>Ward</b>	<b>No. of Hotels</b>	<b>Staff Annexe</b>	<b>Guest Annexe</b>	<b>Annexe Located at Different Address</b>
Abingdon	14	1	1	0
Brompton	25	0	0	0
Campden	5	3	0	0
Stanley	1	0	0	0
Courtfield	32	1	0	1*
Earl's Court	55	3	1	2
Han's Town	11	1	1	1
Holland	12	3	0	0
Pembridge	12	0	0	0
Queen's Gate	23	0	0	0
Redcliffe	6	0	0	0
Royal Hospital	3	1	0	0
Norland	3	0	0	0
Cremorne	1	0	0	0
<b>Total</b>	<b>199</b>	<b>13</b>	<b>3</b>	<b>4</b>

\* recently sold for permanent residential accommodation.

It is clear that the majority of hotels do not have staff annexes which is surprising given the high cost of residential accommodation in the Borough . However, in view of the trend to convert hotel accommodation to permanent residential accommodation, it is likely that the use of annexe accommodation has diminished and the stock that did exist has been sold for permanent residential accommodation.

## **Tourist Hostels**

Tourist hostels have been in the past surveyed as part of the hostel survey for the Borough. In view of the fact that they make an important contribution to the tourist accommodation in the Borough they have been included as part of the 2004/2005 survey of hotels and tourist hostels.

**Table Six: Tourist Hostels Located By Ward 2004/2005**

<b>Ward</b>	<b>No. of Hostels</b>	<b>No. of Bedspaces</b>
Courtfield	3	115
Holland	2	244
Redcliffe	1	180
Queen's Gate	1	180
Pembridge	1	72
<b>Total</b>	<b>8</b>	<b>791</b>

The previous hostel survey in 1996 identified 10 establishments that were primarily catering for tourists. Since that time 3 have been converted to permanent residential accommodation and 1 has been newly formed.

In terms of assessing the quality of hostel accommodation, hostel accommodation is also rated in its own category from 1 to 5 stars. Hostel accommodation is assessed for both quality and facilities including cleanliness, the friendliness and efficiency of staff, décor, furnishings and food (where this is provided).

Of the 8 hostels that have been included in the survey, 3 have a quality rating. These are the Holland House Youth Hostel, administered by the Youth Hostel Association (YHA) and the Earl's Court Hostel (YHA) both of which have a 3 star rating under the English Tourism Council scheme. Baden Powell House, run by the Scout and Guide Association has been classified as a Quality Assurance Hostel by "Visit Britain," the Government organisation now responsible for directing domestic tourist activities.

## **Review Of Planning Decisions On Hotel Development**

To supplement the results gained from the Hotel and Tourist Hostel Survey 2004/2005, a review of the planning decisions relating to hotels/tourist hostels has been undertaken from the period from 1992. Research was undertaken in July 1997 examining planning decisions from 1992 to 1997 so further research has updated this information to January 2005.

The results assist in demonstrating the effectiveness of hotel/hostel planning policies contained within the UDP, particularly in resisting new hotel development and guiding it to acceptable locations within the Borough.

Note that Information on the implementation of planning permissions has not been monitored.

## **Table Seven - Applications For Hotel Development**

### ***July 1992- July 1997***

<b>Application Type</b>	<b>Granted</b>	<b>Refused</b>	<b>Withdrawn</b>	<b>Total</b>
<b>New hotel</b>	3	2	3	8
<b>Loss of hotel</b>	46	0	4	50
<b>Extension/ gains to existing hotel</b>	34	6	1	41
<b>Total</b>	<b>83</b>	<b>8</b>	<b>8</b>	<b>99</b>

***August 1997- January 2005***

<b>Application Type</b>	<b>Granted</b>	<b>Refused</b>	<b>Withdrawn</b>	<b>Total</b>
<b>New hotel</b>	5*	3	1	9
<b>Loss of hotel</b>	32	3	11	46
<b>Extension/ gains to existing hotel</b>	16	3	2	21
<b>Conversion to aparthotel or short stay serviced apts.</b>	7	2	1	10
<b>Loss of staff accom</b>	2	0	1	3
<b>Total</b>	<b>62</b>	<b>11</b>	<b>16</b>	<b>89</b>

\* Of the 5 granted permission, 1 was the redevelopment of an existing hotel.

The total number of applications for new hotels has remained very low. Of the applications that have been granted permission, they have either involved a 'swap' with residential accommodation elsewhere or conversion from existing hostel or short stay accommodation.

It was noted in August 1997 that there had been a significant trend in the loss of hotels with 46 consents from July 1992 amounting to a loss of approximately 36,731 m<sup>2</sup> of hotel floorspace. Forty of the consents were a change to residential use providing a potential increase of approximately 286 residential units. Other changes of use involved changes to include casino, retail and embassy use and to provide timeshare units.

Since August 1997 this trend has continued with the loss of a further 32 hotels, from which there have been there have been 25 consents to residential use resulting in a potential increase of 193 residential units. There has also been a trend towards the refurbishment and conversion to short stay serviced apartments with 7 premises being converted to this type of accommodation.

Despite the loss in the number of hotels further short stay tourist premises have been detected and there have been extensions to existing hotels which has resulted in an increase in the number of bedspaces that are available in the Borough by 11% since August 1997.

The following table shows the change in hotel accommodation by ward since August 1997 including new hotels, loss of hotels and hotel extensions:

**Table Eight - Change in Hotel Accommodation by Ward since August 1997**

<b>Ward</b>	<b>No. of Hotels Lost</b>	<b>No. of New Hotels</b>	<b>No. of Hotel Extensions</b>
Abingdon	3	0	0
Brompton	1	3	1
Courtfield	6	0	0
Earl's Court	11	0	7
Hans Town	2	2	0
Holland	5	0	2
Pembridge	2	0	0
Queen's Gate	1	0	6
Cremorne	1	0	0
<b>Total</b>	<b>32</b>	<b>5</b>	<b>16</b>

The results show that Earl's Court ward has lost the largest number of premises (11) followed by Cremorne ward (6). However, in terms of bedspaces Earl's Court has seen a rise of 547 bedspaces since 1996. This may be explained by the extensions to hotel premises granted in Earl's Court ward (7) whereas Cremorne ward has seen no hotel extensions. Queen's Gate has also seen a high number of hotel extensions (6) in comparison to other wards, but this is also a ward which has experienced growth in hotel accommodation.

## Conclusions

If the results of the 2000 survey are discounted on the grounds of accuracy, it can be seen that the total number of hotels located within the Borough has declined since 1992 but there has been a 11% increase in the number of bedspaces from 27,700 in 1992 to 30,858 in 2005.

In terms of the trends in the Borough as a whole, the north of the Borough is deficient in hotel accommodation with several wards recording no tourist accommodation at all. The central part of the Borough shows a mixed picture with a decline since 1992 in the number of establishments and bedspaces. The apparent significant increase in Campden ward in the number of bedspaces can be accounted for by a more accurate recording of the number of bedspaces located in the two large hotels located there rather than significant growth.

The wards in the south of the Borough have seen a decline in the number of premises and bedspaces with the Hans Town and Royal Hospital wards showing a marked decline.

The wards to the south of Kensington High Street, (namely Abingdon, Queen's Gate, Earl's Court, Courtfield, Brompton and Redcliffe wards), which have historically catered for the majority of visitor accommodation, have all shown a consolidation of visitor accommodation since 1992. They continue to be the main areas of concentration today.

In terms of the location of the hotels it can be seen that only 6% of the hotel stock within the Borough is located within a designated Principal Shopping Centre.

In terms of quality of accommodation, the wards that have seen the largest growth, namely Brompton and Queen's Gate also show most of the accommodation at the top end of the market with a large proportion of the premises having a star rating/diamond rating and the majority of premises having a rating of 4 or 5 stars. By contrast, Earl's Court and Courtfield wards show tourist accommodation towards the bottom end of the market with much of the accommodation having no quality rating and the provision of limited facilities.