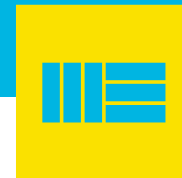


BRIEFING NOTE



TO

Polly Mason

CC

Montagu Evans
KEHG

FROM

Jonny Sharp

DATE

21 August 2023

SUBJECT

Northfleet - Hotel

Dear Polly,

We set out within this Briefing Note further evidence and rationale to support the proposed hotel which forms part of the wider planning application at Northfleet Harbourside on Land surrounding Ebbsfleet United Football Club, Stonebridge Road, Northfleet ("the Site"), under Planning Application reference: 20221064.

HOTEL PROPOSALS

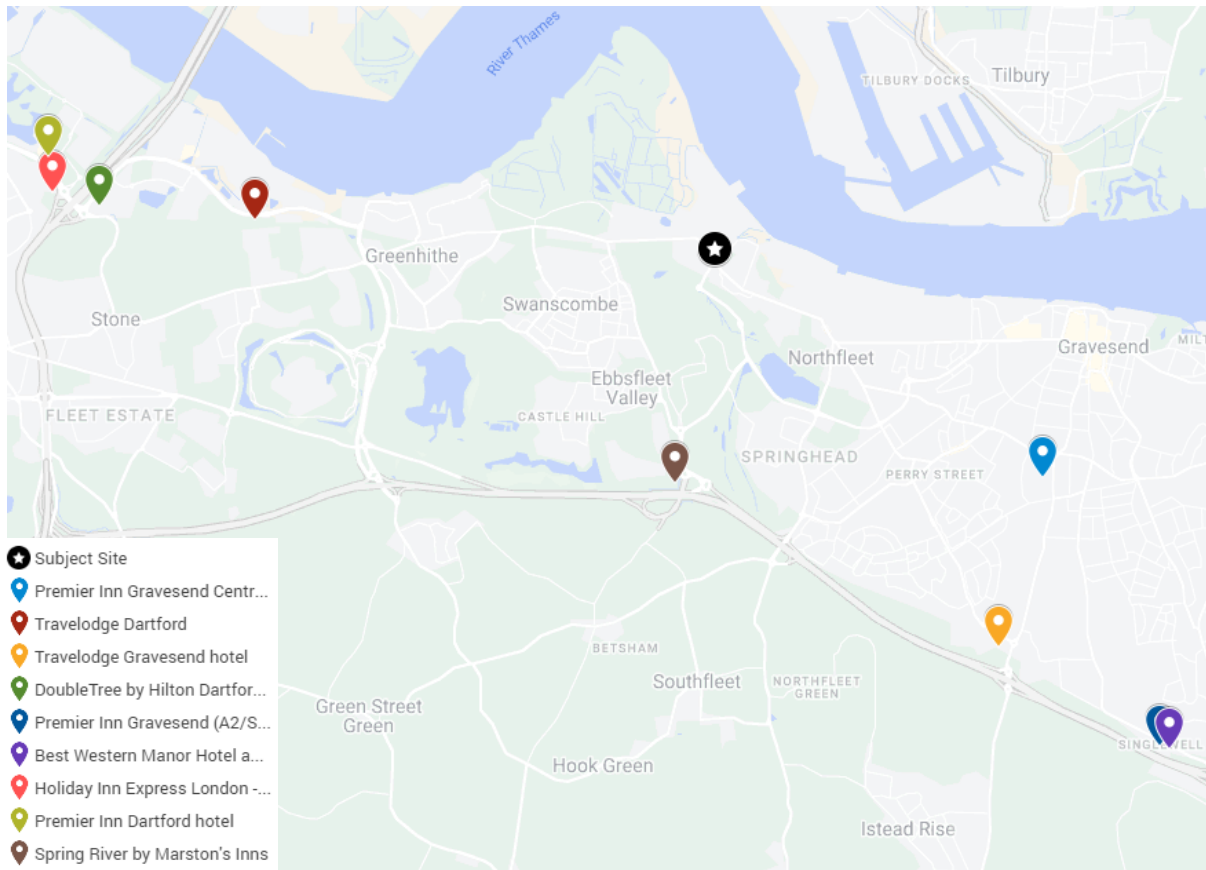
As part of the Boulevard located next to the stadium, which will be developed around a mixed-use active street, is a c.300 bed hotel of c.20,000 sqm in order to support local business visits, events, conferences and matchdays. The proposed development seeks to provide a hotel which will provide accommodation for shoppers, commercial and recreational visitors.

We understand that the proposals are for a mid-tier hotel of c.3-4 star hotel which would align with a hotel facility that comprises hotel rooms together with conference, meetings and event space together with leisure, food & beverage (F&B). As opposed to a typical budget hotel which is generally a "room only" operation with some notional F&B.

HOTEL SUPPLY

The below table and map indicate the current branded hotel supply within a c.4 mile radius of the subject Site.

BRAND	ADDRESS	NO. BEDS	DISTANCE FROM SITE
Marston's Inns	Talbot Lane, Ebbsfleet, SA10 1AZ	104	1.2 miles south
Premier Inn	Wrotham Road, Gravesend, DA11 7LF	69	2 miles south east
Travelodge	Charles Street, Dartford, DA9 9AP	65	2.4 miles west
Travelodge	Coldharbour Road, Gravesend, DA11 8AB	61	2.5 miles south east
DoubleTree by Hilton	Masthead Close, Crossways Bus Park, Dartford, DA2 6QF	179	3.3 miles west
Premier Inn	Hever Court Road, Singlewell, Gravesend, DA12 5UQ	31	3.5 miles south east
Best Western	Hever Court Road, Singlewell, Gravesend, DA12 5UQ	63	3.5 miles south east
Holiday Inn Express	University Way, Dartford, DA1 5PA	126	3.5 miles west
Premier Inn	The Bridge Business Park, Halcrow Avenue, Dartford, DA1 5FX	120	3.6 miles west



The supply of branded hotels within the immediate surrounding area is predominantly “budget” hotels. There are several independent hotels and B&Bs, however we do not consider these to be relevant to the application in question. The current supply is reasonably spread out with no accommodation available within the Northfleet area specifically.

Apart from the Premier Inn located on Hever Court Road all the hotels listed above are in excess of 60 rooms. However, there is not yet a hotel of the capacity suggested for the subject Site. It is reasonable to assume that the current supply of hotels would not be sufficient, nor convenient, to support the proposed development and amenities that will be generated from the implementation and development of the proposed scheme.

There do not appear to be any high-end hotels in excess of 3-star rating within the surrounding area and the mid-tier hotels that are in the locality, notably the Doubletree at Dartford, is a different sub-market to the subject location.

PIPELINE SUPPLY

As referenced within the Design and Access Statement which accompanied the application, page 34 sets out other nearby proposed developments, some of which include hotel provision.

- Harbour Village – 5,000 sqm Hotel
- Ebbsfleet Green – 5,000 sqm Hotel
- Eastern Quarry – 11,000 sqm Hotel

The hotel quantum above on each site is more appropriate for a budget hotel.

We believe that in relation to the Eastern Quarry as part of Ebbsfleet Garden City which has begun development c.1.5 miles south west of the subject Site. We believe that the ‘hotel’ reference in the above planning application is in relation to two hotels, both combined with a pub business. The first hotel-pub was Marston's Spring River hotel (detailed in the hotel supply table), which was built in 2017 and is located on the southern edge of the Garden City. The second hotel-pub, which is yet to

be built, has been confirmed to be The Chalk Yard by Shepherd Neame. This hotel will consist of 17 boutique rooms and will be located centrally within the Garden City, within the Castle Hill area.

HOTEL DEMAND DRIVERS

There are several factors within the Northfleet/Ebbsfleet area that we believe will drive hotel demand. We have listed them in the below table with associated rationale.

DRIVER	RATIONALE
Stadium	- Football Matches; there will be a requirement for accommodation close to the stadium post-redevelopment for fans. At the moment, fans will need to find transport into Gravesend or Dartford for overnight stays. Furthermore, the increased stadium capacity will generate a greater number of visitors. - Events / Music Concerts: The redevelopment of the stadium also proposes further uses for events and music concerts. These events will have an even greater requirement for accommodation than the football matches given many of the spectators will be from the local fan base. - Conferences: The stadium also has event space for large business conferences which often run over several days. This will mean many workers commuting and requiring accommodation.
Proposed Retail Offer	The planning application proposes a new retail offering. This would be a further attraction for the area, bringing in shoppers from further afield as well as local residents. Depending on the final form of retail, the provision could generate visitors from further afield, where hotel accommodation would be a complementary use and provide a full retail and leisure offer for visitors.
Offices	Office accommodation makes up part of the proposed planning application. It is likely that international business trips will be made, and employees will require accommodation nearby to their relevant offices.
Construction Workers	A hotel of the proposed size would be beneficial for providing accommodation for construction workers and other professional associated with the development of the scheme over a number of years.
Resident Visitors	Once completed, the proposed hotel would be able to support visitors of residents within the immediate and surrounding area.
Eurostar	There is speculation that the Eurostar will reopen its Ebbsfleet International and Ashford International stops post-2025. This would be a big driver for hotel demand for traveling passengers. Whilst the dates are TBC, the rail infrastructure is in place for the future opening of the station for Eurostar passengers, to enable future proofing.
Connectivity to London	Ebbsfleet International provides an easy route into St Pancras station within c.18 minutes. A hotel in this area could provide more affordable accommodation for London's visitors within an easily commutable distance.

HOTEL DEMAND

We have researched active requirements of hotel brands for the South East region of England and list them below.

COMPANY	REQUIREMENTS
Travelodge	• Ebbsfleet listed as specific target location • 10,000 – 40,000 sq ft
EasyHotel	• Near major transport hubs • 20,000 – 50,000 sq ft NIA • Leasehold only • Conversion or new build
Moxy Hotels	• 50 sites required in major UK cities / transport interchanges • Locations include secondary locations with public transport access / transport hubs / commercial centres • Empty land plots with a size of 2,000 to 10,000 sqm / existing buildings to demolish • Long leasehold or freehold • Sites with additional developable land for commercial and residential • Sites with or without planning permission
B&B Hotels UK	• Target city centre and edge of town locations including transport hubs • Maidstone area listed as target location • 80-250+ beds • Leasehold model • Looking to partner with developers, land owners and funds • All types of development considered including standalone hotel and mixed-use scheme

Whilst Travelodge, Easyhotel and B&B Hotels UKs represent operators from the budget tier of the market, Moxy a lifestyle brand within the Marriott group presents a midscale offer, and we would also consider interest from other notable parties such as IHG, Accor and Hilton all of whom operate in the midscale market and have a track record of delivery hotels of c. 200-300 beds.

OPERATOR DEMAND

In addition to the active requirements listed above, whilst subject to a Non-Disclosure Agreement (NDA), an international hotel chain has made a proposal to operate a hotel under a management style agreement, with such an agreement common place in the market for a midscale hotel. Should a planning permission be forthcoming, the proposal will be advanced further with the interested party, whose initial proposal is a hybrid hotel management agreement with a base guaranteed base rent.

SUMMARY

In conclusion, we consider the hotel proposals for the Site in the form of c.300 bed hotel / 20,000 sqm to be different to the existing and pipeline supply in the Northfleet area. In addition, we consider that the wider development which proposed a new stadium (increased capacity) which includes conference and event space together with commercial and residential development will be significant demand drivers for a hotel operator (noting the interest to date) and future guests.