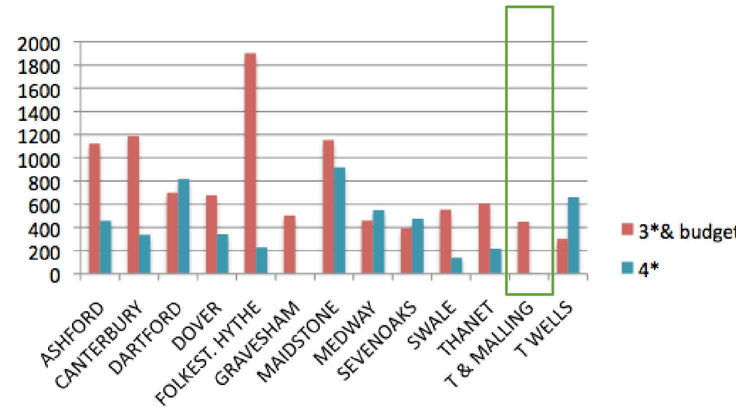
5.12a. District Dashboard Tonbridge & Malling

Tonbridge and Malling falls in the bottom 50% of Kent's districts for both business and holiday bed-nights. A relatively high proportion of its overnight visitors are VFR or stay in second homes – at 47%, comparable to Dartford (at 48%) and Sevenoaks (45%). T&M's MICE capacity is amongst the lowest in the county – slightly higher than that of Dartford, although it has more MICE ready establishments than Ashford, and it is also in the lower 50% in terms of group-tour ready accommodation. The database research found no 4* accommodation in T&M, and it is also the third lowest for 3*/budget accommodation, slightly above Tunbridge Wells and Sevenoaks. Airbnb provision is one of the lowest in the county, but growing, with a higher proportion of room only rentals, and widely dispersed across the district. The **rental demand** metric is also low compared to other districts.



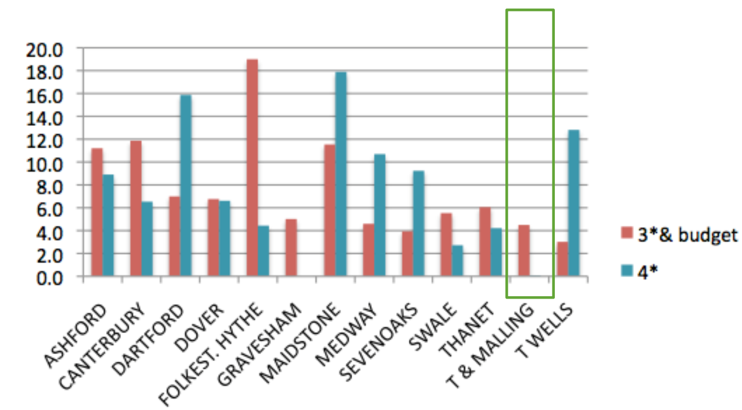
3* and 4* bed distribution by district

8/13 for **BUSINESS NIGHTS**: 147,100 bed-nights = 5.9% of total for Kent
10/13 for **HOLIDAY NIGHTS**: 291,800 bed-nights = 3.6% of total for Kent

4 **MICE-ready** accommodation establishments = 4.7% of county total
Total **MICE capacity**: 570 = 3.5% of county capacity within accommodation establishments
Largest single MICE venue capacity: 200

Group tour-ready establishments: 6 = 6.5% of Kent total

Airbnb: 125 ACTIVE RENTALS with a **rental growth** of **346%** between 2016 (Q2) and 2019 (Q2). **Rental demand** 63 (12th /13)



3* and 4* bed nos by district as percentage of county total

Sources of data for district dashboards: Extrapolated from Destination Research 2018, Visit Kent Business Barometers, CCCU Accommodation Database audit and Airdna webpages (subscription to district level data).

Visitor Offer

The Borough's *Economic Regeneration Strategy* (adopted in 2019) notes that Tonbridge & Malling has 'significant tourism assets' but 'not as high a tourism profile as other parts of Kent'. The area's natural and cultural heritage form its key offer, and this is expected to become even more important, particularly in attracting visitors to town centres, where events and visitor experiences are expected to increase footfall.

Key Drivers for the Visitor Economy

Proximity to London is a key factor shaping economic development in Tonbridge & Malling, driving both the VFR profile of its visitor economy, and impacting land and property prices, which heavily skew the market towards residential development, and may also account for the high proportion of room-only rentals characterising the growing Airbnb provision in the Borough.

The Borough is split into two contrasting halves: the north, similar to Ashford, has a high level of transport and logistics operations, whilst commuting and professional services predominate in the south. Tonbridge has recently seen substantial residential growth, but the town centre is facing challenging conditions, which the Council is seeking to address with a strategy to introduce more mixed use, making town centres into 'destinations' that embrace the wider visitor economy beyond retail.

Drivers

Main:

Location - proximity to London and continent, driving both VFR market and land/property prices. In the aftermath of COVID, may enhance the Borough's attractiveness as day-visit escape destination for London market.

Supplementary:

Visitor offer – natural and cultural heritage. Public realm improvements in towns and country parks, including cycle lanes, new ponds and habitat, will enhance visitor offer (completion 2023).

Policy – Council plans for town centre regeneration through more mixed-use development aim to turn town centres into destinations with an events and experiences offer.

Infrastructure - completion of the Borough's *flood defence scheme* will have a positive impact on tourism properties and heritage assets.

Gaps in Provision

Higher-end tourism accommodation is in short supply, and there is a desire to broaden the offer through e.g. a quality spa hotel. However, suitable sites are at a premium because of the demand for residential development, and a number of promising hotel projects have lost out to housing developers.

Links to key planning and policy documents

Tonbridge & Malling Borough Council Local Plan 2020-2031 (draft) https://www.tmbc.gov.uk/services/planning-and-development/planning/planning-local-plans
COVID has delayed consultation on the new Local Plan (submitted 2019). 'Virtual' consultation due to start in October, but the Local Plan will be affected by the relaxation of planning laws, announced in July to come into effect in the autumn, in ways that are not yet known.

The new circumstances imposed by COVID are also forcing a rethink on the four-year *Economic Regeneration* strategy (2019-2023), presenting a very different picture for town centres and for the up-skilling agenda: **Borough Economic Regeneration Strategy (2019-2023)**
https://www.tmbc.gov.uk/services/business/business-support-and-advice/boorugh-economic-regeneration-strategy

Tonbridge & Malling Borough Council Corporate Strategy 2020-2023
https://www.tmbc.gov.uk/__data/assets/pdf_file/0003/245514/Corporate-Strategy-2020-2023.pdf

Priority gaps

High-end hotel accommodation

Quality spa hotel

Town centre and mixed-use hotel development

Support for inward investment:

Enabling environment:
Planning support on case by case basis.

Joint ventures:
The Council is ready to consider joint venture partnerships on its town centre land holdings.