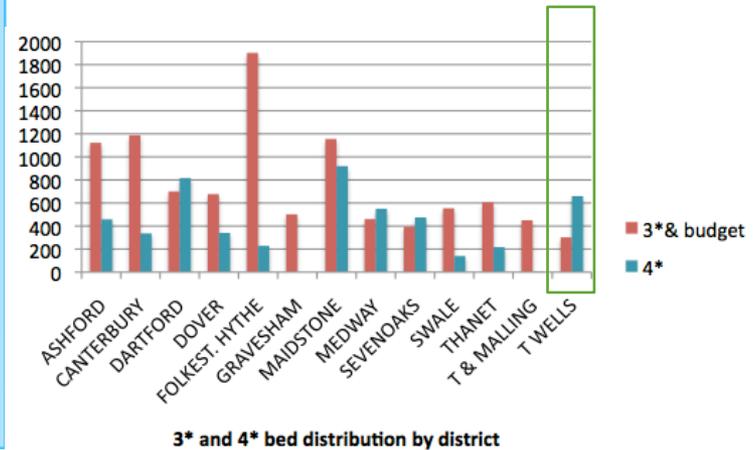


5.13a. District Dashboard Tunbridge Wells

Tunbridge Wells falls squarely in the mid-third of Kent's districts for both business and holiday bed-nights, and also in terms of total MICE capacity and group tour-ready establishments. However, it comes fourth in terms of number of establishments equipped for MICE stays (after Dover, Thanet and Maidstone). Tunbridge Wells has a high proportion of the county's 4* accommodation – 12.8% of Kent's 4* capacity, less only than Maidstone and Dartford – but comes lowest in terms of 3*/budget provision. Airbnb provision is moderate, exhibiting moderate growth, with a higher predominance of entire house rentals, centered around both Tunbridge Wells and the wider rural hinterland. Despite this, the rental demand is the highest for the county, reflecting a relatively high travel demand in this area.



7/13 for **BUSINESS NIGHTS**: 160,000 bed-nights = 6.4% of total for Kent

7/13 for **HOLIDAY NIGHTS**: 533,000 bed-nights = 6.6% of total for Kent

10 **MICE-ready** accommodation establishments = 9.3% of county total

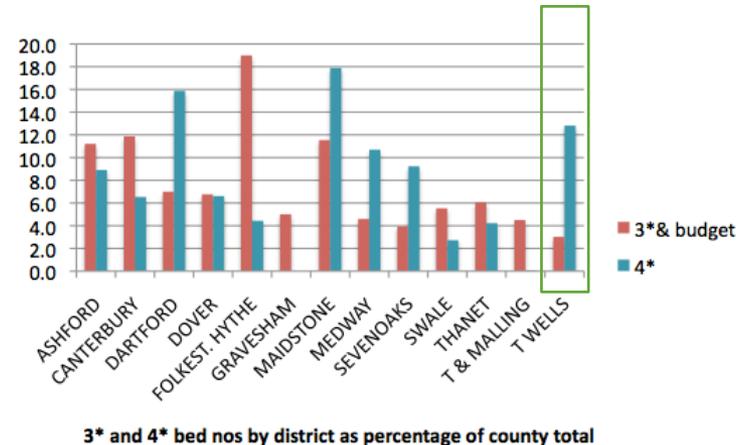
Total **MICE capacity**: 1,197 = 7.4% of county capacity within accommodation establishments

Largest single MICE venue capacity: 250



Group tour-ready establishments: 7 = 7.6% of Kent total

Airbnb: 483 **ACTIVE RENTALS** with a **rental growth** of **335%** between 2016 (Q2) and 2019 (Q2). **Rental demand** 91 (1st/13)



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).

5.13b. Tunbridge Wells (interview findings)

Visitor Offer

The Borough of Tunbridge Wells benefits from a high quality built and natural environment, with two thirds of the district AONB designated (High Weald). Royal Tunbridge Wells is the main destination town, with its spa town heritage and distinctive Pantiles complemented by an increasing focus on culture and a lively evening economy. The wider rural landscapes and smaller villages and attractions, such as Scotney Castle, Bedgebury Pinetum, and various vineyards (Biddenden Vineyards, Chapel Down Winery and Hush Heath Winery) provide a heritage and nature offer, together with attractive settings for a wider visitor experience.

Key Drivers for the Visitor Economy

The newly emerging Local Plan is key to shaping the future direction of the Borough and the role of the visitor economy. The local economy is highly dominated by SMEs/micro-organisations, and financial and professional services, cultural and creative sector, education and, historically, retail (*although currently struggling due to COVID*), play a strong role within the local economy. The Draft Local Plan views the visitor economy as *'an important contributor to the local economy of Tunbridge Wells in both the urban and rural areas in terms of providing investment opportunities and generating employment.'*

Council priorities include support for the cultural and creative sector linking to the visitor economy offer. Key to this is the development of the new Cultural and Learning Hub, to include the redeveloped museum and art gallery and public library. Due to open in 2022, *The Amelia Scott* development will fill a gap in the attraction base of the town centre, drawing in wider audiences and enhancing dwell time. With a strong rural offer, the visitor economy also continues to provide opportunities for rural diversification and small-scale local enterprise.

Partnerships are also considered key: firstly between districts (the borough works actively with Sevenoaks and Tonbridge & Malling to facilitate the vision for West Kent - West Kent Partnership); and, secondly, within the district (e.g. *Royal Tunbridge Wells Together BID* whose business plan links into the cultural and creative sectors and supports events and promotion of the town).

Drivers



Main:

Policy – the emerging Local Plan and evidence base provide a strong focus for the role of the visitor economy.

Visitor offer – the Amelia Scott development will provide an enhanced museum offer, additional exhibition space and improvements to the public realm.

Supplementary:

Policy- Council priority to support the cultural and creative sector with ambitions to grow the borough's role as the 'cultural centre of the Kent and Sussex High Weald'.

5.13b. Tunbridge Wells (interview findings)

Gaps in Provision

Key recommendations made by the **Hotel Capacity Study** have been fed directly into recent support for planning applications and into the emerging Draft Local Plan (the *draft site allocations*). Whilst only in draft form at the time of writing the report, these provisions include a specific policy [Southborough AL/S04] to support the proposal for a luxury hotel development of up to 200 rooms with leisure, spa and conference facilities within a restored historic estate. Allocations are also proposed for mixed-use developments in Royal Tunbridge Wells town centre (*which could include hotel/conference provision within the mix*).

Thus, the Borough is actively seeking to enhance its hotel provision to include a luxury spa offer. Additional hotel provision as part of mixed-use developments in Royal Tunbridge Wells may also be sought. Development in rural areas is constrained by AONB and Green Belt designation, but the Local Plan looks to support and retain provision in rural areas, and change of use linked to rural diversification seems to be the most viable route to address needs in the wider countryside setting.

Links to Key Planning and Policy Documents

- Current **Draft Local Plan** (Sept 2019) https://beta.tunbridgewells.gov.uk/_data/assets/pdf_file/0015/300606/Consultation-Draft-Local-Plan.pdf [pre-submission version due March/April 2021 for adoption June 2022. See Policy ED 7 Retention of, and promotion of new, tourist accommodation and attractions p.475]
- *Tunbridge Wells Borough Council* (July 2016) **Tunbridge Wells Borough Site Allocations Local Plan** https://beta.tunbridgewells.gov.uk/_data/assets/pdf_file/0012/130107/Site-Allocations-Local-Plan-July-2016.pdf
- Nexus Planning (April 2017) **Hotel Capacity Study** Report on behalf of Tunbridge Wells Borough Council https://beta.tunbridgewells.gov.uk/_data/assets/pdf_file/0007/291733/Tunbridge-Wells-Hotel-Capacity-Study.pdf
- Tunbridge Wells Borough Council (2017) **The Five-Year Plan 2017-2022** (Corporate Strategy) http://www.tunbridgewells.gov.uk/_data/assets/pdf_file/0020/53291/Five-Year-Plan-2017-2022.pdf
- Tunbridge Wells Borough Council (2014) **Cultural Strategy 2014-24** http://www.tunbridgewells.gov.uk/_data/assets/pdf_file/0019/55810/cultural-strategy-June-2016-low-res.pdf

Priority gap

5* spa offer – to draw on spa heritage and health and wellbeing agenda

Support for inward investment:



Enabling environment:

The Local Plan and evidence base are the cornerstone for the strategic approach to inward investment.



Joint ventures:

The borough is part of the West Kent Partnership, working with Sevenoaks and Tonbridge & Malling to promote economic development priorities across the three local authority areas.