Tunbridge Wells

Hotel Capacity Study

on behalf of Tunbridge Wells Borough Council

April 2017

Nexus Planning

Tunbridge Wells

Hotel Capacity Study

on behalf of Tunbridge Wells Borough Council

April 2017

London
Riverside House
Southwark Bridge Road
London SE1 9HA

t: +44 (0)20 7261 4240
w: nexusplanning.co.uk
@nexusplanninguk

Manchester
Eastgate
2 Castle Street, Castlefield
Manchester M3 4LZ

t: +44 (0)161 819 6570
w: nexusplanning.co.uk
@nexusplanninguk

Weybridge
Suite A, 3 Weybridge
Business Park, Addlestone Road,
Weybridge, Surrey KT15 2BW

t: +44 (0)1932 837 850
w: nexusplanning.co.uk
@nexusplanninguk

Nexus Planning

Contents

Appendix A

Established Stock of Visitor Accommodation in Royal Tunbridge Wells Borough

1.0 Introduction

1.1 Nexus Planning has been commissioned by Tunbridge Wells Borough Council to undertake a Hotel Study to assess Tunbridge Wells Borough's current supply of hotels and its capacity for new hotel development across the Borough.

1.2 The Study considers national and regional trends as well as changes to the supply of hotels in the Borough.

Aims and Objectives

1.3 The aim is to provide a robust evidence base, conclusions and recommendations in order to set a benchmark for appropriate type and scale of hotel development within Tunbridge Wells Borough. It is anticipated that the findings of this Study will be beneficial in informing the Council's future Local Plan policies and vision and assist the assessment of planning applications for hotel schemes.

1.4 Key objectives of this Study are as follows:

- To provide an audit of existing hotel stock within the Borough, evaluating the stock by location and star grade;
- Undertake a survey and understand where local residents are most likely to recommend visiting friends and family to stay;
- Undertake an assessment of the trends in visitor accommodation, tourism and tourism economy at national, sub-regional and local level;
- Undertake a review of the growth in likely visitor numbers and resident population over the Plan period and analyse how demand may increase;
- To outline current national and local market trends and provide an overview of the existing supply of hotels within Tunbridge Wells Borough;
- To understand where the capacity of existing hotels in terms of vacant rooms has changed since the previous study was carried out in 2014;
- To outline planned hotel development within the Borough and identify any extant planning permission for hotel developments to understand how these schemes might help to eradicate any gaps in the local market; and
- Undertake a gap analysis and provide recommendations for hotel development for the duration of the Plan period.

2.0 Context

National Trends

2.1 The performance of the UK hotel market is typically reflected by the UK economy, which in the later part of 2016 has been impacted by the results of the EU referendum. The UK provincial Hotel Market report prepared by Knight Frank (2016) outlines that Global issues such as the increased threat of terrorism in major cities, an economic slowdown in China, the US presidential elections and uncertainty leading up to Brexit resulting in reduced corporate travel expenditure, have all sought to dampen demand for London hotels.

2.2 Whilst the London hotel market has experienced a growth in new hotel rooms in the first half of 2016, followed by decrease in demand because of reduced corporate travel expenditure, the UK regional market has remained relatively unaffected by the recent and on-going global and economic concerns. The regional hotel market has remained aligned to, and driven by, domestic issues and events.

2.3 The International Passenger Survey (IPS) for Travel Trends 2015 found that overseas residents made 36.1 million visits in the UK, which is 5.1% higher than in 2014. This was the fifth consecutive annual increase and a record figure for the IPS. The main purpose of tourism trips by UK residents in the UK is for a holiday and this purpose remains unchanged. Tourism trips by UK residents in the UK account for 13.9 million visits, which is a rise of 2.1% compared with 2014.

Figure 1: UK Long-Term Domestic Travel Trends (Source: GBTS December 2015 Published 5th April 2016)

2.4 The GB Tourist Statistics (2015) which focuses specifically on Great Britain identifies that the volume of holidays has risen by 6%. More specifically, visits to friends or relatives (VFR), has risen by 10% and business related trips have risen by 4% compared to the 2014 volume of trips recorded.

2.5 Domestic trips by the UK residents have shown a strong recovery in 2015, in particular, trips involving visits to friends and family grew at a faster rate in 2015 compared to 2014. The GB Tourist Statistics 2015 recognises a net increase in domestic tourism by 1% across the 2010 to 2015 period.

2.6 The UK Hotels Forecast 2017 report (*Facing the Future A Question of Balance)* prepared by PwC suggests that whilst the effects of Brexit has resulted in a decrease in business related domestic trips, there has been an increase in leisure related domestic trips by up to 8%. The forthcoming departure from the European Union could therefore drive the demand for domestic holidays, reaffirming the 'staycation' effect in the UK.

2.7 Based on the current and forthcoming economic drivers and the Great Britain Tourism Survey 2016 data, it is evident that our budgets are more constrained. The tourism forecast is therefore expecting an increase in new types of domestic holidays within the UK over the next decade. This holiday type will involve turning visiting friends and relatives trips into leisure trips.

South-East England Trends

Destination - Region (2015)	Trips (m)	Trips (%)	Spend (£m)	Spend (%)
Total England	**102.73**	**100**	**19,571**	**100**
West Midlands	8.83	9	1,454	7
East of England	9.73	9	1,630	8
East Midlands	8.02	8	1,146	6
London	12.94	13	3,080	16
North West	13.55	13	2,555	13
North East	3.84	4	710	4
South East	**16.8**	**16**	**2,572**	**13**
South West	19.68	19	4,434	23
Yorkshire & the Humber	11.32	11	1,922	10

Figure 2: Domestic Overnight Trips 2015 (Source: Visit England, England Tourism Factsheet, August 2016)

2.8 The South East comprises the counties of Berkshire, Buckinghamshire, East Sussex, Hampshire, Isle of Wight, Kent, Oxfordshire, Surrey and West Sussex.

2.9 The South East is the second most visited region in the UK. According to the Visit England 'England Tourism Factsheet – August 2016', 16.8 million domestic overnight trips (with an expenditure of £2,572 million) to the South East in 2015. This represents 16% of the domestic overnight trips undertaken in the UK (equating to 13% of the national expenditure). The South East has also experienced 216 million day trips, which represents 17% of the day trips undertaken in the UK.

2.10 The overall domestic tourism trend in the South East has indicated a steady growth between the 2008 to 2014 period, as outlined in Figure 3. In line with the average domestic holidays undertaken nationally, the South East has continued to experience a healthy volume of domestic holidays.

	Number of Domestic Holidays (m)	
Year	Total England	South East Trips
2008	39.75	5.77
2009	47.01	7.64
2010	43.54	6.14
2011	46.16	6.37
2012	45.99	6.64
2013	44.93	6.78
2014	40.74	6.14
Annual average growth 2008-2014	**1%**	**2%**

Figure 3: South East England Domestic Holidays Trends for 2008-2014 (Source: Visit England - South East England and Domestic Tourism)

2.11 In terms of the purpose of domestic trips undertaken, total holiday trips (including those to visit friends and relatives) make up the largest proportion of domestic trips within the UK. This is summarised in Figure 4 below.

Purpose of Domestic Trips	South East Trips (m)	South East Trips (%)
All Holidays	6.14	38
1-3 night holidays	4.47	28
4+ night holidays	1.67	10
Visiting Friends and Relatives (VFR)	7.57	47
Leisure	4.61	28
Other	2.97	18
Business Travel	1.98	12
Total	16.19	100

Figure 4: Purpose of domestic trips to the South East in 2015 (Source: GBTS Online Data Browser 2015)

2.12 The South East also attracts a healthy volume of pure holiday related visits, where the primary purpose is for a short break (1-3 nights). The region also attracts a small proportion of business related trips; however, business trips are often driven by economic conditions and are likely to fluctuate in light of the recent economic events.

2.13 Historically, the majority of domestic regional trips have been led by the purpose of visiting friends and family. This is expected to continue to be the driver for domestic trips in the South East.

Kent Trends

2.14 According to the Visit England South East Tourism Factsheet 2014, an average of 3.2 million annual trips to Kent have been recorded which makes up 18% of domestic trips undertaken in the UK. Effectively, Kent is the second most visited destination in the South East. Figure 5 below summarises domestic travel trends in Kent in comparison to the rest of the UK across a three-year period.

Period 2012 - 2014 (Averages taken)	Total trips (Thousands)	Holiday trips (Thousands)
England	**99,607**	**43,883**
Berkshire	1,870	625
Buckinghamshire	1,160	213
East Sussex	2,189	1,025
Hampshire	3,480	1,328
Isle of Wright	955	662
Kent	**3,199**	**1,207**
Oxfordshire	1,606	483
Surrey	1,478	258
West Sussex	1,624	774

Figure 5: Sub-Regional Volume of Domestic Overnight Tourism – 3 year averages 2012-2014 (Source: Visit England South East 2014 Fact Sheet)

Tunbridge Wells Trends

2.15 The spa town of Royal Tunbridge Wells has attracted tourists since the 17th century and the current tourist industry is significant to the Borough's economic progression as it provides investment opportunities and generates employment. The Tunbridge Wells Local Plan 2006 together with the Council's Five Year Plan 2014-2019 recognises that tourism is dependent on a high quality built and natural environment, and therefore the Local Plan strongly emphasises the protection and enhancement of this asset. The Core Strategy Development Plan Document 2010 highlights that provision of tourism in the Borough includes opportunities for leisure, shopping, eating and access to museums, galleries, theatres and historic properties which make a vital contribution to the Borough's economy.

2.16 In accordance with Visit Kent's Economic Impact of Tourism Tunbridge Wells 2015, a total of 313,000 overnight domestic trips to Tunbridge Wells have been recorded (with an expenditure of £60,888,000). Since 2013, there has been a 1.6% increase in the total number of trips undertaken and a 4.4% increase in expenditure.

2.17 A breakdown of the purpose of the trips undertaken in Tunbridge Wells is outlined in Figure 6 below.

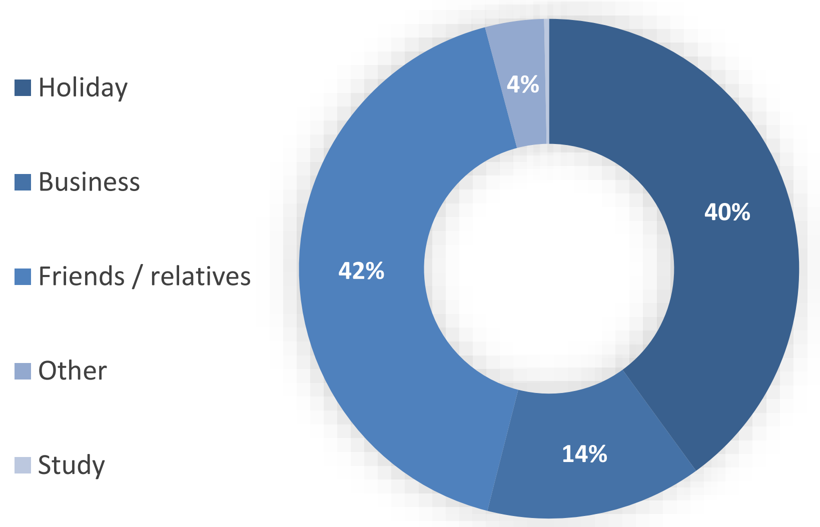

Figure 6: Tunbridge Wells – Trips by Purpose 2015 (Source: Economic Impact of Tourism Tunbridge Wells - 2015 Results prepared by Visit Kent November 2016)

2.18 Whilst the majority of the trips undertaken in Tunbridge Wells are for visiting friends and family, the proportion of holiday related trips is only marginally smaller. Tunbridge Wells' proximity from London makes it a popular short break destination, which contributes to a significant proportion of the holiday trips undertaken.

2.19 Tunbridge Wells has maintained a steady increase in the volume of domestic trips annually and is expected to continue to increase at a steady rate. However, given the similarity in the proportion of visiting friends and family trips and holiday trips, Tunbridge Wells is expected to see an increase in combined holiday and visiting friends and family trips over the next decade.

3.0 Visitor Accommodation

National Trends and Developments

3.1 The lack of a comprehensive register of hotels and other serviced accommodation in the UK means the size of the sector is difficult to calculate. In 2011, the estimated visitor accommodation stock in the UK was 45,480 hotel establishments (including guesthouses) offering a total of 728,671 bedrooms. As of 31st December 2013, the estimated total of rooms has increased to 730,258 located within an estimated 45,000 hotels including guesthouses. The average of 16 rooms per hotel accounted for in 2011 remains unchanged.

3.2 Figure 7 below summarises the structure of the hotel industry (2013).

	Number of establishments	Number of rooms	Average number of rooms per hotel
200+ rooms	339	106,734	315
101-200 rooms	1,141	156,943	138
51-100 rooms	1,892	135,525	72
26-50 rooms	2,357	86,395	37
11-25 rooms (est)	6,300	100,000	16
Up to 10 rooms (est)	32,971	144,661	4
Total	**45,000**	**730,258**	**16**

Figure 7: Structure of hotel industry by number of rooms, 2013 (Source: Melvin Gold Consulting Ltd)

3.3 Colliers International's UK Hotel Market Index (2016) indicates that in the first nine months of 2016, a total of 124 new hotels (8,100 rooms) have opened in the UK. The Hotel Britain 2016 report prepared by BDO has identified over 24,000 rooms in the UK's active hotel pipeline that are expected to open, between 2016 - 2017.

3.4 The Hotel Britain 2016, reports hotels across the UK have experienced a strong growth from 2012-2015, as a result of robust growth in the average achieved room rate and a modest increase in occupancy levels.

3.5 In 2015, Visit England identifies a total of 33,374 establishments (including b&bs, hotels and guesthouses) offering a total of 790,707 bedrooms.

3.6 Pursuant to the recorded breakdown of the national hotel stock in 2013, 51% of the total hotels stock make up was independent hotels. Figure 8 illustrates the breakdown of hotel stock make up.

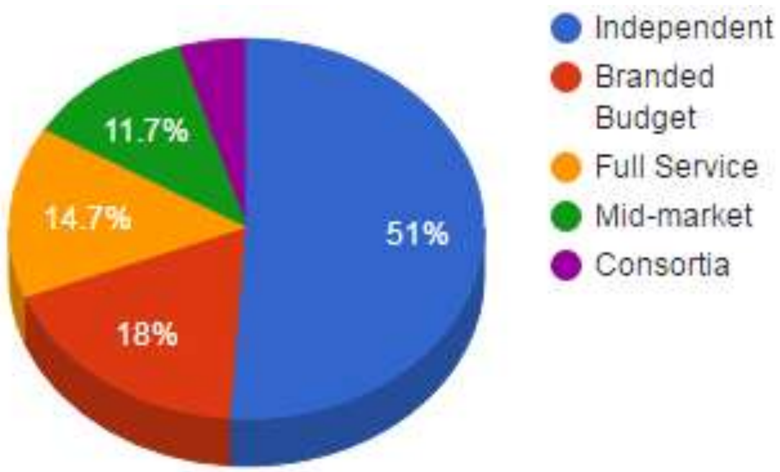

Figure 8: Make up of the Total Estimated Hotel Stock, 2013 (Source: Melvin Gold Consulting, cited in Hotel Industry Digest)

3.7 The Hotel Industry Digest identifies that between 2013 and 2016, the national hotel stock has experienced a steady growth and pursuant to Figure 8, there is a significant margin between the total volume of independent hotels and branded budget hotels. For the purposes of this assessment, branded budget hotels are defined as hotels owned by corporate chain companies that own same brand hotels in multiple locations, whereas independent hotels refer to individual hotels that are independently owned.

3.8 The provision of branded budget hotels is seen to be increasing nationally with more in the pipeline. Whilst this is the case, the volume of independent hotels is expected to continue to lead for the 2016 to 2017 period.

South East England Trends and Developments

3.9 The Hospitality Digest 2014 identified the South East as having the third highest number of hotels and rooms, which indicates the importance of hospitality and tourism in this part of the UK. Similar to the hotel stock make up in the UK, the South East region also accommodates a significantly larger proportion of independent hotels.

3.10 The Hotel Britain 2016 report has also found that regional hotels in particular have continued to experience a strong growth in 2015 with an increase in occupancy levels. Based on the current stock make up of hotels within the South East, it is expected that independent hotels will continue to make up the bulk of the hotel offer over the next decade.

3.11 The breakdown of hotel and hotel room numbers across the country is outlined in Figure 9 below.

	Full Service	Mid-Market	Budget	Consortia	Independent	Total
North East	2,320	2,496	4,072	1,155	10,123	20,166
North West	9,187	11,048	15,050	3,572	55,931	94,788
Yorkshire & Humberside	4,043	7,099	8,631	2,251	25,098	47,122
West Midlands	6,752	8,472	12,496	1,844	17,830	47,394
East Midlands	3,944	3,677	7,593	1,966	19,010	36,190
East of England	3,776	5,622	11,638	2,783	19,888	43,707
Greater London	42,899	16,161	24,300	7,537	40,158	131,055
South East	**14,902**	**11,331**	**18,651**	**4,806**	**42,344**	**92,034**
South West	5,755	7,230	10,395	4,007	57,689	85,076
England	*93,578*	*73,136*	*112,826*	*29,921*	*288,071*	*597,532*
Scotland	*11,003*	*8,683*	*11,871*	*2,263*	*50,891*	*84,711*
Wales	*1,979*	*2,395*	*4,900*	*1,686*	*25,395*	*36,262*
Northern Ireland	*511*	*938*	*1,792*	*296*	*8,125*	*11,662*
Total	**107,071**	**85,152**	**131,389**	**34,166**	**372,480**	**730,258**
% of Total	**14.7**	**11.7**	**18.0**	**4.7**	**51.0**	**100**

Figure 9: Analysis of UK serviced accommodation sector by region, category and number of rooms in 2013 (Source: Melvin Gold Consulting, cited in Hospitality Digest 2014)

4.0 Economic Development for Tourism Priorities

4.1 Hotels and other types of visitor accommodation are part of the economy in their own right as businesses and employers, as well as enabling other parts of the economy to fulfil their potential. In particular:

- Visitors staying in hotels and other accommodation spend money on catering, transport, retail and entertainment/attractions.
- Businesses in other sectors require accommodation for their clients, suppliers and business partners, as well as providing conference and meeting spaces. In this sense, hotels are part of the local business infrastructure.

National Planning Policy Framework

4.2 The National Planning Policy Framework (NPPF) does not outline any particular provisions relating to hotel development within the UK. Annex 2 of the NPPF identifies hotels as "culture and tourism development" which is a main town centre use and therefore subject to paragraphs 23 to 28 of the NPPF.

4.3 Paragraph 23 of the NPPF highlights how local planning authorities should plan to protect and promote the viability of town centres. This provision recommends that planning permissions for town centre uses such as hotels proposed either on the edge of town centre or outside the town centre should only be granted if it can be demonstrated that there are no suitable sites closer to the town centre that are both available and suitable. 'Edge-of-centre' as a location is defined as being well connected and up to 300m from the town centre boundary. Locations further than 300m from the town centre boundary would be classified as an out of centre location.

4.4 This is further carried over into Paragraph 24 of the NPPF, which outlines the requirements for a sequential test to give preference to accessible sites that are well connected to the town centre.

4.5 Paragraph 26 of the NPPF outlines that details of impact assessment must be provided for a hotel development that is over a threshold of 2,500 sq m. The Tunbridge Wells Local Plan does not specify a local threshold for an impact assessment.

4.6 Paragraph 27 of the NPPF states that where an application fails to satisfy the sequential test, or is likely to have a significant adverse impact on one or more of the above factors, it should be refused.

4.7 Economic growth in rural areas as referenced in Paragraph 28 of the NPPF also includes tourism. "*To promote a strong rural economy, local and neighbourhood plans should:*

- *Support the sustainable growth and expansion of all types of business and enterprise in rural areas, both through conversion of existing buildings and well designed new buildings;*
- *Promote the development and diversification of agricultural and other land-based rural businesses;*
- *Support sustainable rural tourism and leisure developments that benefit businesses in rural areas, communities and visitors, and which respect the character of the countryside. This should include supporting the provision and expansion of tourist and visitor facilities in appropriate locations where identified needs are not met by existing facilities in rural service centres; and*
- *Promote the retention and development of local services and community facilities in villages, such as local shops, meeting places, sport venues, cultural buildings, public houses and places of worship.*

Kent Economic Development Priorities

4.8 Kent County Council's (KKC) Strategic Priority Statement 2014/2015 prepared by the Growth, Environment and Transport Directorate seeks to create an environment that promotes business growth and an increase in employment. The key focus lies in encouraging business growth.

4.9 KCC seeks to promote investment into the local economy and manage regeneration projects that make Kent an attractive place to live, work and visit. The KCC Framework for Regeneration 2009 – '*Unlocking Kent's Potential'* highlights that Tonbridge and Tunbridge Wells are major urban areas, as are Folkestone, Canterbury and Thanet. Furthermore, the 21st Century Kent (2010) report prepared by Farrells notes that Royal Tunbridge Wells is one of the largest retail centres in Kent, attracting business from across the county and that the town has the opportunity to prosper through transport infrastructure improvements.

4.10 This KCC Framework for Regeneration 2009 reinforces the need to act locally in order to set the right conditions for economic growth. Accordingly, the following priorities have been outlined in the KCC Framework for Regeneration:

- Building new relationship with business
- Unlocking talent to support the Kent economy
- Embracing a growing and changing population
- Building homes and communities
- Delivering growth without transport gridlock
- Two cross cutting themes: Meeting the climate change challenge and recognising Kent's

diversity

4.11 Some of the themes set out in the above listed priorities are also carried forward in the economic development priorities set out in the KCC Strategic Priority Statement 2014/2015:

- Accelerating jobs and housing growth
- Getting the best deal for the Local Enterprise Partnership (LEP) for Kent and Medway
- Best representing business needs and opportunities for the whole council

4.12 The KCC Growth, Environment and Transport Directorate's Strategic Priority Statement 2014/2015 also seeks to promote Kent's identity as a prime tourist location and leverage funding into the county to enhance cultural, arts and film opportunities for visitors, investors and residents to achieve Kent's full economic potential.

4.13 The KCC Framework for Regeneration 2009 – '*Unlocking Kent's Potential'* has recognised that the Kent economy is comprised of a wide variety of businesses across various sectors. Whilst diversity is the strength to Kent's economy, there are future business and market opportunities in particular sectors. One of the identified sectors is the Tourism, Hospitality and Leisure sector.

4.14 Kent's role as a visitor destination and the priority to continue development opportunities to increase visitors and enhance visitor experience has continued to form part of KCC's Strategic priorities.

4.15 The Kent County Council's Framework for Regeneration 2009 has highlighted that the visitor economy is important to Kent. Kent's tourism value is estimated to be worth approximately £2.5 million, which supports almost 50,000 employees across Kent and Medway. In line with this, the KCC Strategic Priority Statement 2014/2015 seeks to develop and promote Kent as a destination for the UK and international visitors.

4.16 To support the visitor economy, Visit Kent as commissioned by KCC has outlined the following measurable objectives which have remained unchanged since 2014[1]:

- *To increase day and short break visits to Kent*
- *To increase the value of tourism of Kent*
- *To encourage visitors to use 'green' transport for environmental benefits (and increase public transport borne visitors)*

1 www.visitkentbusiness.co.uk/home=avk/our-marketing/our-strategy

- *To promote Kent as a good value destination*

4.17 The identified target market to boost tourism economy are:[2]

- *Domestic with focus on: Kent Residents and the Visiting Friends and Relatives Market and Londoners (and those visiting the capital)*
- *Near Europeans (France, Belgium, Netherlands and Germany)*
- *Overseas Visitor Day Trips Out of London – looking for the quintessential English experience as part of their visit*
- *Media*
- *Travel Trade*

4.18 Whilst Kent naturally benefits from solid tourism opportunities with international historical assets and a strong rural offer, it's overall cultural and tourism offer is continuing to improve. The (South East LEP) Kent and Medway Growth Deal and Strategic Economic Plan 2014 recognises that this has been a result of investment in facilities such as the Turner Contemporary at Margate, the Marlowe at Canterbury and Folkestone Creative Quarter.

4.19 The accessible location given its proximity from London and the European market, the continual links between the tourism and creative industry (including the film industry), life sciences associated with discovery parks, port-based activities and higher education bases such as Canterbury are strong opportunities for continued growth and demand for the Kent tourism industry.

Tunbridge Wells Borough

4.20 Royal Tunbridge Wells forms the majority of the urban area of the Borough and contributes a significant proportion of its social, cultural and economic opportunities. The spatial vision outlined in The Core Strategy Development Plan Document (DPD) 2010 is "*In 2026, Tunbridge Wells is a Borough of economic and social prosperity founded on seized opportunities for business and enterprise and a respect for the exceptional quality of the environment that makes it unique."*

4.21 Tunbridge Wells as a Borough forms part of the West Kent Partnership, which also comprises of Sevenoaks District Council and Tonbridge and Malling Borough Council. Notwithstanding West Kent's prime location which provides immediate access to London, the West Kent Partnership has identified that West Kent benefits from a thriving business community. The area also captures a number of successful small and medium sized businesses and start-ups that contribute to the thriving

2 www.visitkentbusiness.co.uk/home=avk/our-marketing/our-strategy

business community.

4.22 The Core Strategy 2010 identifies that, in addition to being the Borough's principle retail centre, the town of Royal Tunbridge Wells provides a wide variety of services, which includes tourism. Tunbridge Wells' historical assets and architectural features such as The Pantiles provide a good quality environment that attracts a significant amount of tourism to the Borough. Such features of Tunbridge Wells, has supported independent retailers and brings vitality to previously underused areas and variety to visitors and customers.

4.23 The Strategic Objective SO2 of the Core Strategy seeks to *"focus development at Royal Tunbridge Wells to stimulate and sustain the economic growth and competitiveness of Royal Tunbridge Wells as a Regional Hub in a way that also provides business opportunities for local people. Focusing development at the Regional Hub should not prejudice the need to support the rural economy by protecting and enhancing the vitality and viability of the Borough's small rural towns; neighbourhood centres; village centres; and wider rural area."*

4.24 The tourism economy is a vital part of the overall economy of Tunbridge Wells and the Council wishes for it to grow. The Destination Management Plan for Tunbridge Wells 2013-2016 prepared by Blue Sail (October 2013) highlights that Tunbridge Wells Borough is estimated to have received 4.5 million visitors in 2011. Around 321,000 overnight tourism trips were made; domestic visitors made up 83% of trips (268,000) and overseas visitors made up 17% (53,000).

4.25 The Destination Management Plan for Tunbridge Wells 2013-2016 has identified that the total economic impact (including retail, induced and indirect effects) is estimated at £241 million, supporting over 4,400 jobs. The visitor expenditure was recorded as 9% towards accommodation, 38% towards catering establishments, 32% towards retail, 10% towards attractions and entertainments and 12% towards transport.

4.26 In line with the above, the Borough's Five Year Plan 2014-2019 recommends the implementation of the Destination Management Plan and envisions an increase in the number of jobs created and an overall growth and value of tourism. The Five Year Plan 2014-2019 also encourages investment and employment generation within various sectors including tourism. This document is currently being updated by the Council, but the growth of the local economy and tourism development is still seen as a key sector of growth for the Borough.

5.0 Tunbridge Wells Tourism

Vision and Key Priorities

5.1 The Destination Management Plan has set out the following vision for Tunbridge Wells:

"Tunbridge Wells' Vision for 2020 is to be widely recognised as an ideal short break destination at the centre of the High Weald, offering the warmest hospitality, great attractions and the highest quality natural environment to enjoy. Tourism businesses will be working together well, developing and promoting the visitor offer with expertise and imagination. They and their local suppliers will be prospering and job opportunities at all levels will be growing."

5.2 In line with the key economic drivers in the Borough, the Destination Management Plan has set out the following key priorities for the tourism sector in Tunbridge Wells:

- *To identify and communicate the essence of the place – as a contemporary historic town, deep in its High Weald and Garden of Kent setting*
- *To develop the all-round offer to visitors, so they are inspired by the experience*
- *To embrace a modern information plan*
- *To strengthen the networks of collaboration and innovation in the sector*

Key 'Destination' Drivers

5.3 The Borough of Tunbridge Wells is centrally located within the High Weald Area of Outstanding Natural Beauty (ANOB), which is an area of very high landscape value and attraction. It is also a centre for historic houses, castles and gardens that are open to the public. The character of the Royal Tunbridge Wells Town Centre is led by its history as a spa town and the townscape of the Georgian Pantiles is an excellent example of this history. Today, The Pantiles attracts a wide range of visitors as it offers places to meet and eat, strong presence of independent shops, and open, semi-natural areas of the Common.

5.4 Key attractions include renowned gardens and National Trust properties such as Sissinghurst and Scotney Castle and independently owned historic houses, many associated with famous historic and literary connections. The Bedgebury National Pinetum and Bewl Water are examples of recreation led visitor attractions and the Tunbridge Wells Museum and Art Gallery are also some of the formal local destination drivers.

5.5 The Destination Management Plan highlights that guided walks around the town of Royal Tunbridge

Wells are very popular as it offers intrinsic knowledge about the town and its heritage. The Tourist Information Centre also highlighted that garden tours around Kent (commonly described as the Garden of England) are also very popular and usually organised through tour operators.

5.6 In addition to historical and architectural drivers, Tunbridge Wells is also known for its fresh produce, its hops and oast houses and more recently for its vineyards. The local live music scene within a range of pubs, clubs and venues including The Forum, Trinity Theatre, Assembly Hall Theatre and The Grey Lady Music Lounge contribute as key cultural destination drivers in Royal Tunbridge Wells.

5.7 Annual festivals, including the International Young Artists Competition and The Unfest alternative music festival are also known cultural destination drivers in Royal Tunbridge Wells. The Tourist Information Centre has also highlighted that the wedding market is an important market for Tunbridge Wells Borough as a whole.

5.8 The Pantiles, heritage, landscape and scenery, local shopping opportunities, restaurants and its central location are the key tourism and cultural drivers in Royal Tunbridge Wells. These drivers are typical examples of attractions that appeal to professional couples and family's seeking short breaks, aged 50+, spa/pampering breaks and special interest groups.

Population Projections

5.9 Based on the in-house data sourced from the Experian Micromarketer G3 system, Nexus has calculated baseline population data and population projection data within an identified Study Area. The Study Area comprises of the Borough and the surrounding areas as identified in Figure 5.2 of the associated Tunbridge Wells Retail and Leisure Study (April 2017) prepared by Nexus Planning. We have taken a base date of 2016 (the year of this Study), calculating population forward through to 2035 (as shown in Figure 10 below).

2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
429,304	432,834	436,390	440,094	443,927	447,712	451,438	455,087	458,782	462,452

2026	2027	2028	2029	2030	2031	2032	2033	2034	2035
465,931	469,258	472,609	475,953	479,218	482,303	485,323	489,160	492,159	495,000

Figure 10: Population Projection for the Study Area (Experian MMG3 system)

5.10 As of 2016, the Study Area is estimated to contain a resident population of 429,304, which is projected to increase by 15.3% by the year 2035, equating to 65,696 additional residents.

5.11 The resident population within the Study Area is anticipated to undergo a steady increase over the next two decades. The steady increase in the overall population within the Study Area is consequently anticipated to result in a steady increase of annual visitor trips into the Borough.

Expenditure

5.12 Figures 11a and 11b outline a summary of the total consumer expenditure on accommodation services per person, broken down by domestic and international spending, across both the UK and the South East from 2014-16.

National Expenditure	2014		2015		2016	
	(£)	*(%)*	*(£)*	*(%)*	*(£)*	*(%)*
Holiday Abroad	62	46	62	40	95	40
Holiday in the UK	74	54	92	60	140	60
Total Holiday Spend	136	100	154	100	235	100

Figure 11a: National Consumer Expenditure on Accommodation Services (Experian MMG3 system)

South East Expenditure	2014		2015		2016	
	(£)	*(%)*	*(£)*	*(%)*	*(£)*	*(%)*
Holiday Abroad	67	43	89	45	133	45
Holiday in the UK	88	57	109	55	160	55
Total Holiday Spend	155	100	198	100	293	100

Figure 121b: South East Consumer Expenditure on Accommodation Services (Experian MMG3 system)

5.13 Spending on domestic holidays has consistently increased over the 2014 to 2016 period across both the UK and the South East. Notably, expenditure from the South East region has remained consistently higher than the national average, which suggests that local residents undertake more domestic and international holidays than the rest of the UK.

5.14 Whilst residents of the South East spend more on holidays annually per person than the UK average, the proportion of spending on holidays abroad is higher in the South East than across the UK. Since 2014, the proportion of spending on domestic holidays from residents across the UK has increased, whilst across the South East this pattern has marginally decreased. This would indicate that there is an increased demand for domestic holidays across the UK; however, this trend is not reflected among residents of the South East.

Current Visitor Accommodation Supply

5.15 The official tourism website for Tunbridge Wells currently identifies 51 serviced visitor accommodation operators within the Borough. The current supply comprises a mix of 27 b&bs, 7 inns, 1 motel and 16 hotels facilitating a total of 634 bedrooms within the Borough. Figure 12 provides a summary of the Borough's current hotel supply.

Type	Branded	Establishments	No. of Rooms
Hotels	5	16	513
Motel	-	1	6
B&Bs	-	27	70
Inns	-	7	45
Total	5	51	634

Figure 13: Current Visitor Accommodation Supply in Royal Borough of Tunbridge Wells

5.16 The Borough's visitor accommodation stock (by establishment type) has a heavy concentration of b&bs which makes up 53% of the visitor accommodation supply, followed by hotels (31%), inns (14%) and a motel (2%). However, when evaluated by bedroom supply, the current visitor accommodation stock make up is 81% hotel rooms, 11% b&b rooms, 7% inn rooms and 1% motel rooms, suggesting that b&bs and inns are typically far smaller than the hotels across the Borough.

5.17 The average number of rooms offered by the hotel establishments is 32 rooms per establishment. Comparatively, the average number of rooms offered by the b&b establishments is considerably smaller with an average of 2.7 rooms per establishment.

5.18 It is to be noted that 31% of the hotel stock (43% of hotel bedrooms) is branded, owned by a corporate chain company. Branded hotels offer the highest average volume of bedroom numbers per establishment within the Borough with large chain hotels such as Travelodge and Mercure offering over 80 bedrooms per establishment.

5.19 There are no branded b&bs, inns and motels within the Borough; however, it is not uncommon for b&b and Inn style establishments to operate under independent ownership as this provides a unique and a boutique style offer for the consumers.

5.20 A summary of the total volume of branded hotels within the Borough is outlined in Figure 13 below.

Establishment	Brand	Rating	Rooms	Location
Smart and Simple	Great National Hotels	3*	37	Royal Tunbridge Wells
Travelodge	Travelodge	3*	86	Royal Tunbridge Wells
Tunbridge Wells Retreat	Great National Hotels	3*	3	Royal Tunbridge Wells
Mercure Tunbridge Wells Hotel	Mercure Group	4*	84	Royal Tunbridge Wells
George Hotel	Shepard Neame	3*	12	Cranbrook
Total Bedrooms	222 Rooms			

Figure 14: Current supply of branded hotels in the Borough

5.21 Only 10% of the Borough's total visitor accommodation stock is branded therefore the majority of the stock (90%) are independently operated. Notably, only five establishments of the total hotel establishment stock are branded and furthermore, three out of the five branded hotels form part of the Great National Hotels Group. The branded stock makes up nearly 50% of the total hotel bedroom supply within the Borough.

5.22 Compared to the previous Hotel Futures Update 2014, it is to be noted that the total number of establishments have increased by 11% and consequently the total volume of bedrooms have increased by 5%. Whilst the number of hotel and b&b establishments have remained unchanged, the number of hotel bedrooms has increased by 2% and the number of b&b bedrooms has decreased by 8%. The main change is the increase in the total volume of Inns by 57% and the addition of a 6-bedroom motel.

5.23 The Borough also has a supply of self-catering units and accommodation available via the Airbnb platform. Given that the previous Hotel Future Update 2014 did not include self-catering and Airbnb establishments in the Study, this Study has excluded such establishments for the purposes of consistency and to undertake an effective analysis of the changes in the hotel stock since 2014. Nonetheless, this new entrant into the market provides facilities in both urban town centres (competing with traditional hotel operators) and more rural areas (where there are fewer traditional forms of visitor accommodation).

Quality

5.24 A summary of the current visitor accommodation stock and total number of bedrooms by its rating is outlined in Figures 14 and 15.

Type	Star Rating					
	*2**	*3**	*4**	*5**	*Unrated*	Total
Hotel	1	5	5	-	5	16
B&B	1	2	9	3	12	27
Motel	-	-	-	-	1	1
Inn	-	-	1	-	6	7
Total	2	8	15	3	23	51

Figure 15: Current Visitor Accommodation Stock by Rating

Type	Star Rating					
	*2**	*3**	*4**	*5**	*Unrated*	Total
Hotel	23	161	250	-	79	513
B&B	2	6	20	6	36	70
Motel	-	-	-	-	6	6
Inn	-	11	20	-	14	45
Total	25	189	300	6	116	634

Figure 16: Current Visitor Accommodation Bedrooms Supply in the Borough

5.25 The majority of the Borough's visitor accommodation stock is ungraded. This is followed by four star graded hotels, which make up 30% of the current stock. Notably, the majority of the Borough's hotel bedrooms (47%) are also four star rated, followed by three star graded bedrooms which make up 30% of the total bedrooms.

5.26 The majority of the hotel establishments are three star and four star rated and the majority of the b&b establishments are ungraded or four star rated. The Borough has a very limited supply of two star or budget/affordable accommodation. At present, the Borough only has 25 (two star graded) budget/affordable accommodation bedrooms on offer, which makes up just 4% of the Borough's entire visitor accommodation stock.

5.27 There are no five star graded hotels within the Borough; however, it is notable that 12% of the b&b stock is five star.

5.28 The concentration of three star and four star graded establishments is primarily in Royal Tunbridge Wells Town Centre and the majority of this volume is provided by large branded hotels such as the Travelodge and Mercure Tunbridge Wells, which collectively make up 39% of the three star and four star graded bedrooms in the Borough. This is not uncommon in major conurbations as such establishments are usually in high demand by large tour groups and business trip related visits where facilities typically offered by three star and four star graded hotels are required.

5.29 In terms of budget/affordable accommodation, Royal Tunbridge Wells Town Centre is lacking in affordable accommodation (which could be considered to be two or three star or ungraded hotels providing a similar offer), as the centre only has a single two star graded establishment, which offers 23 rooms. Royal Tunbridge Wells Town Centre has no establishments that could accommodate large-scale budget tour groups.

5.30 Ungraded establishments tend to vary significantly in terms of quality and services offered and this is due to their independent nature and style of operations. For instance, it is not uncommon for some larger ungraded establishments to offer bespoke and boutique quality service. This factor is often heavily led by prime location, niche marketing and consumer feedback/comments.

5.31 One Warwick Park is an ungraded hotel establishment, however, it is recognised as one of the Borough's most prestigious and hi-tech hotel establishments that could potentially equate to a four or five star establishment. The quality and facilities provided for small ungraded b&b and Inn establishments are unknown because of lack of marketing, albeit the grading requirements for hotel and b&b establishments are different. Therefore, for the purposes of this Study, the quality of ungraded establishments are not accounted for in order to understand the true volume of the

Borough's visitor accommodation stock by quality.

Location

5.32 Figures 16 and 17 provide a breakdown of the Borough's hotel stock by location, identifying the current distribution of hotel supply within Royal Tunbridge Wells Town Centre and the rest of the Borough. For the purposes of this Study, the rural area refers to all other centres and surrounding hinterland located across the Borough.

	Royal Tunbridge Wells Town Centre	Rest of the Borough
Hotels	12	4
b&bs	9	18
Inn	-	7
Motel	-	1
Total	21	30

Figure 17: Breakdown of current visitor accommodation stock by location

	Royal Tunbridge Wells Town Centre	Rest of the Borough
Hotels	405	108
b&bs	30	40
Inn	-	45
Motel	-	6
Total	435	199

Figure 18: Visitor Accommodation Bedrooms by Location

5.33 41% of the Borough's visitor accommodation stock is located within Royal Tunbridge Wells Town Centre, the majority of which are hotel establishments. This distribution is not uncommon as large town centres are expected to have a high concentration of serviced visitor accommodation. Additional factors that drive hotel location also include public transport accessibility and proximity from key tourist attractions, event spaces and visitor amenities. Royal Tunbridge Wells Town Centre is serviced by two main train stations; Tunbridge Wells, and High Brooms.

5.34 The remaining 59% of the Borough's visitor accommodation stock is primarily distributed in the surrounding rural areas of the Borough and the majority of these are b&b establishments. Notably, there are only 2 hotel establishments that are located in the surrounding centres of Cranbrook and Hawkhurst.

5.35 In general, the distribution of visitor accommodation stock in the rural areas is widespread and not concentrated in any particular centres. Hawkhurst, Southborough and Cranbrook are the only centres that currently offer serviced visitor accommodation. Cranbrook, in particular hosts the most serviced visitor accommodation facilities (three in total) compared to the other town centres in the surrounding rural area. Cranbrook is identified as a popular tourist destination as it does provide an excellent base for exploring the surrounding hinterland.

5.36 Paddock Wood is a notable centre that benefits from good transport links, in particular the mainline train links to London. It also accommodates a National Rail Training Centre located in close proximity to the Paddock Wood Station, which brings in a large number of National Rail employees and business opportunities in Paddock Wood. It therefore provides a good base for visitors on business related trips. However, it does not accommodate any serviced visitor accommodation.

Household Survey Results

5.37 A key task of this Study is to identify the most recommended serviced accommodation within the Borough. This has been carried out as part of the NEMS Market Research household telephone survey undertaken in September 2016 for the identified Study Area. Whilst a total of 1,600 residents participated in the survey, it is to be noted that not all 1,600 participants completed the length of the questionnaire and therefore this data is subject to limitations. Details of the survey undertaken are outlined in Section 6 of the associated Tunbridge Wells Retail and Leisure Study.

5.38 Within the household telephone survey residents across the Study Area were asked to outline their recommendation for serviced accommodation for visiting friends and family. Figure 18 below summarises the top 10 list of serviced visitor accommodation recommended in the Borough.

Establishment	Type	Location	Quality	Public Recommendation
The Spa Hotel	Hotel	Tunbridge Wells	4*	26.50%
Hotel du Vin & Bistro	Hotel	Tunbridge Wells	4*	23.00%
Travelodge	Hotel	Tunbridge Wells	3*	6.93%
Mercure Tunbridge Wells	Hotel	Tunbridge Wells	4*	5.87%
The Tunbridge Wells Hotel	Hotel	Tunbridge Wells	Ungraded	4.25%
Royal Wells Hotel	Hotel	Tunbridge Wells	3*	3.96%
Smart & Simple Hotel	Hotel	Tunbridge Wells	3*	1.39%
The Queens Inn	Inn	Hawkhurst	4*	1.12%
The Russell Hotel	Hotel	Tunbridge Wells	2*	1.11%
George Hotel	Hotel	Cranbrook	3*	0.95%

Figure 19: Top 10 recommended establishments in the Borough

5.39 80% of the top 10 recommended choice of visitor accommodation is located within Royal Tunbridge Wells town Centre and 90% of these are hotel establishments. Royal Tunbridge Wells town centre is very accessible with a centrally located train station. It already provides a strong base for all major group tours to visit key attractions within the Borough.

5.40 Notably, 90% of the total stock of branded establishments within the Borough, were identified in the recommendations outlined in Figure 18.

5.41 It is not uncommon for branded hotels to be highly recommended by the public as they are usually located in readily accessible areas within the heart of the centre. The recommendations of branded hotels is also likely driven by the level of marketing associated with the brand itself, as this results in a greater perception of service and quality.

Occupancy

5.42 There is no reliable up-to-date data for annual occupancy in b&bs and guest houses, however, the Kent Hotel Fact File 2011 notes that figures for Tunbridge Wells Borough are higher than Kent averages, particularly in accommodation that is located close to major attractions and those that are well marketed.

5.43 Pursuant to the Visit Kent's Visitor Economy Barometer 2015, Kent experienced a 4.3% increase in the average annual occupancy rates compared to 2014. Figure 19 below summarises and compares the average annual room occupancy in 2014 and 2015.

	UK Average	Kent Average	Kent Average	
	Serviced Accommodation Occupancy	Serviced Accommodation Occupancy	Hotel / Chain	B+B / Inns
2015	69.8%	75.5%	75.7%	69.9%
2014	69.2%	72.4%	75.3%	62.8%

Figure 20: Average Annual Room Occupancy Comparison between UK and Kent (source: STR Global as cited in Visitor Economy Barometer 2015 prepared by Visit Kent)

5.44 In 2016, the months of January, February, April and June experienced a decrease in occupancy rates compared to 2015. The months of March, July, August, September and October experienced an average increase compared to 2015. Tourism data for the months May, November and December (along with an annual report 2016) is currently unavailable or is yet to be issued.

5.45 In 2015, Kent experienced a larger increase in occupancy rates than the UK as a whole.

5.46 The Tunbridge Wells Hotel Futures Update Volume 3 – Final Report (June 2014) prepared by Peter Brett Associates outlines that average annual room occupancy rates in 2005 were as follows:

- *73% for 3 and 4 star hotels in Royal Tunbridge Wells*
- *63% for 2 star/diamond rated hotels in Royal Tunbridge Wells*
- *88% for budget hotels in Royal Tunbridge Wells*
- *55% for inns in rural Tunbridge Wells*

5.47 In 2014, the Hotel Futures Update Volume 3 – Final Report highlighted that there is little evidence that the above-mentioned average annual occupancy rates have changed significantly since 2005. According to the Tunbridge Wells Tourist Information Centre, there is little variation impacting visitor accommodation occupancy within the Borough. Occupancy is at its lowest level between January and March. Nonetheless, hotels are frequently booked for short breaks, primarily weekend stays with typical room occupancy of two people per bedroom.

5.48 The average annual room occupancy rates within the Borough, are broadly comparable to Kent's average annual room occupancy rates and indicates steady demand for hotel rooms within the Borough, which has been maintained since 2005.

Proposed Hotel Developments

5.49 Further to the recent conversion of The Brew House to One Warwick Park (a 39 bedroom hotel establishment), a net additional 119 bedrooms are in the pipeline.

5.50 A planning permission was granted in November 2015 for the conversion of the four star graded Salomons Estate (47-bedroom hotel estate) with a new five star graded 56-bedroom hotel establishment.

5.51 A new 110-bedroom Premier Inn Hotel, is currently proposed in Royal Tunbridge Wells Town Centre. Premier Inn forms part of a large corporate chain company and typically provides a three star budget or a limited service hotel, though we note that the proposed Premier Inn scheme has been submitted as being ungraded. The supporting planning application (reference: 16/06570/FUL) for this proposal was considered at the Planning Committee held on 29th March 2017 where the Committee granted planning permission for this scheme.

5.52 The Tunbridge Wells Tourist Information Centre has also advised that a total of three hotels within Royal Tunbridge Wells Town Centre have recently undergone refurbishment works, however, there has been no net increase in the overall supply of bedrooms.

5.53 Despite the new supply of visitor accommodation within the Borough, the overall proportion of choices offered by the Borough's visitor accommodation stock will remain unchanged maintaining the majority of three star and four star graded hotels on offer. However, in light of the recent resolution to grant planning permission for a 110-bedroom Premier Inn hotel in Royal Tunbridge Wells Town Centre will consequently result in an increase in the proportion of the branded budget hotels offer within the Borough.

5.54 In addition to the hotel developments listed above, the Borough Council also has a number of town centre schemes in the pipeline, including a new Cultural and Learning Hub for Tunbridge Wells. This ambitious project will bring together a new modernised museum, art gallery, library and adult education centre and visitor information centre in a central location. The proposed Hub is anticipated to further promote Royal Tunbridge Wells Town Centre as a destination boosting the overall volume of visitors to the centre. There are also plans for a new Civic Centre and Theatre to be re-provided in the town centre furthering increasing the attraction of the town to visitors.

6.0 Gap Analysis

Changes in Hotel Supply

6.1 Since the previous Study by Peter Brett Associates (PBA) was completed in 2014, the overall number of visitor accommodation establishments in Tunbridge Wells Borough has increased from 45 to 51. When considering the breakdown of establishments, the number of hotels has remained the same (16), the number of b&bs has increased by 1 to a total of 27, and the number of inns has increased from 3 to 7. In addition, there is one establishment classified as a motel.

6.2 The majority of change in the overall supply of establishments is a result of the increase in b&bs and inns. The number of established hotels in the Borough has not changed since June 2014 when the last Study was completed.

6.3 The majority of the Borough's visitor accommodation is independently owned, however branded hotels offer the largest number of available rooms. There appears to be no shortage of branded hotels within the Borough.

6.4 The overall number of hotel, motel, b&b and inn rooms in the Borough was 634 as of February 2017. This is an overall increase of 33 rooms since 2014.

6.5 While the number of hotels in the Borough has not changed since 2014, the overall number of hotel rooms has increased from 505 rooms to 513 rooms as of February 2017. An overwhelming proportion of the bedrooms across the Borough are found in hotel establishments (513 of 634 in total), rather than in motels, b&bs and inns.

6.6 The majority of visitor accommodation within the Borough has a quality rating of four star or higher with 15 establishments rated four star and three establishments rated five star. Interestingly, in the 2014 Study by PBA there were 22 establishments identified as having a four star rating and four identified as having a five star rating. Eight establishments were found to be unrated in 2014, and 22 in the current Study.

6.7 Only two establishments (a hotel and a b&b) were considered to be 'affordable', having a rating of two stars. This is a reduction of four affordable establishments since the PBA Study in 2014 when a total of six were identified.

6.8 Figure 20 identifies the results of the NEMS Survey for public perception of the current visitor accommodation stock. 32.9% of respondents identified that there were deficiencies in the amount of affordable accommodation in Tunbridge Wells illustrating the need for additional affordable accommodation.

6.9 The NEMS Survey also identifies that there is a perception of deficiency in both the overall provision of hotels and the provision of b&b accommodation.

Deficiencies in the Current Hotel Stock	Total
Affordable Accommodation	32.9%
Hotel Provision	27.6%
B&B Provision	22.4%
Quality of Local Accommodation	15.1%
Big Brand Hotels	1.7%
Disabled Access Provision in Accommodation	0.3%

Figure 210: Deficiencies identified in the current Visitor Accommodation Stock by the NEMS Survey

Location of hotels

6.10 When comparing the locations of visitor accommodation stock within the Borough some patterns emerge. Hotel establishments are generally more likely to be found within Royal Tunbridge Wells Town Centre, while b&bs, inns and motels were more likely to be located in the more rural parts of the Borough.

6.11 It has been found that there is a lack of hotels across the rural parts of the borough. Only Cranbrook, Hawkhurst and urban areas of Southborough offer hotel accommodation outside Royal Tunbridge Wells Town Centre. Meanwhile there is an abundance of hotel establishments within Royal Tunbridge Wells Town Centre (12 hotels). The larger branded hotels are also almost all found in Royal Tunbridge Wells, with the exception of the George Hotel located in Cranbrook.

6.12 It has been found that there is also a healthy offer of b&bs in proximity to key tourist attractions within the Borough, but also a lack of budget accommodation in proximity to these attractions.

Occupancy Levels

6.13 There is a lack of accurate and up to date data on occupancy rates for hotel establishments in the Borough. Nonetheless, data sourced from Visit Kent's Visitor Economy Barometer 2015 identified that in 2015 there was a 76% annual average occupancy rate for hotel and chain hotels, and a 70% annual average occupancy rate for b&bs and inns.

6.14 It has been identified that the average annual occupancy rates for Kent are generally similar to Tunbridge Wells Borough. While there are certainly fluctuations throughout the year, the overall average occupancy rates are high indicating a steady demand for visitor accommodation within the Borough.

7.0 Recommendations

7.1 Tunbridge Wells as a Borough has maintained a steady volume of trips and demand for visitor accommodation over recent years. Domestic tourism, including trips involving attendance at weddings, funerals, family events and similar functions, which drive visiting friends and family related trips has steadily increased in the Borough since 2012. This driver for domestic tourism within the Borough is likely to continue to grow steadily over the next decade.

7.2 The rural part of the Borough encompassing the centres of Southborough, Paddock Wood, Cranbrook, Hawkhurst and the surrounding hinterland has a healthy provision of visitor accommodation stock and has no imminent pressures for new visitor accommodation. Nonetheless, subject to commercial interest, there is potential for a larger, budget branded hotel within the rural part of the Borough, specifically targeted towards catering to the larger tour groups. Subject to all other material planning considerations, such development could provide economic support to local rural business and attract additional revenue streams to the rural parts of the Borough.

7.3 Whilst Royal Tunbridge Wells also has a healthy provision of visitor accommodation, there is a lack in choice and quality of serviced accommodation and the town could benefit from a wider and more competitive offer. Whilst there are a number of three star and four star graded hotels it is considered that a greater degree of affordable stock would be desirable to add to the overall offer of the town. Additionally, it is considered that there is a lack of luxury five star hotels within the town offering accommodation at the higher end of the market.

7.4 Based on a steady increase in domestic tourism across the UK and within the region, there is scope to upgrade and expand existing visitor accommodation across the Borough to facilitate more rooms and provide new and/or improved amenities such as spa facilities and packages. Given the heritage of Royal Tunbridge Wells Town Centre as a spa town, which attracts a large number of pampering breaks / weekend holidays, the existing and proposed hotel establishment could offer improved and extended spa facilities and packages to tap in to this potential market.

7.5 Pursuant to the finding of the Household Survey, the respondents from the Study Area have highlighted that parking availability is a considerable issue within the Borough. The Tunbridge Wells Tourism Information Centre has also highlighted that parking capacity is a key consideration for visitors when choosing accommodation. This is a particular requirement for larger tour groups and we would recommend that all plans for hotel developments and expansions should also incorporate a detailed parking strategy/sustainable travel assessment, including opportunities for using public transport, in order to support the proposed development.

7.6 Whilst most parts of Royal Tunbridge Wells Town Centre are accessible and are well serviced by public transport links, the surrounding rural areas of the Borough do not benefit from robust public transport links, which could potentially increase parking demands. As such, it is recommended for all plans for hotel developments and expansions outside of Royal Tunbridge Wells Town Centre to incorporate a detailed traffic impact assessment and parking strategy.

7.7 The Tunbridge Wells Tourism Information Centre has also highlighted that very few wheelchair accessible hotel bedrooms are available within the Borough. It is therefore recommended that for new hotel developments, and all upgrade and expansion plans for existing hotels, applicants should consider appropriate provision of wheelchair accessible and wheelchair adaptable rooms in order to increase the overall supply of wheelchair accessible hotel bedrooms offer within the Borough.

Appendix A

Established Stock of Visitor Accommodation in Royal Tunbridge Well Borough

*[*RTW = Royal Tunbridge Wells]*

Hotel Establishment	Location	Brand	Rating	No. of Rooms
Salomons Estate	RTW		4*	47
One Warwick Park	RTW		Ungraded	39
Smart and Simple	RTW	Great National Hotels	3*	37
The Russell Hotel	RTW		2*	23
The Spa Hotel	RTW		4*	69
The Tunbridge Wells Hotel	RTW		Ungraded	20
The Royal Wells Hotel	RTW		3*	23
Travelodge	RTW	Travelodge	3*	86
Tunbridge Wells Retreat	RTW	Great National Hotels	3*	3
Hotel du Vin & Bistro	RTW		4*	41
Mercure Tunbridge Wells	Pembury	Mercure Group	4*	84
George Hotel	Cranbrook	Shepard Neame	3*	12
Smith and Western	RTW		4*	9
Anand Lodge	RTW		Ungraded	8
Leafwood Oast	Bells Yew Green		Ungraded	1
Royal Oak Hotel	Hawkhurst		Ungraded	11

Establishment - b&bs	Location	Brand	Rating	Rooms
Danehurst House	RTW		5*	4
Hononton Cottage Bed and Breakfast	Rural		5*	2
Beacon Hall House	Cranbrook		Ungraded	3
Cloth Hall Oast	Rural		Ungraded	3
Lamberden House	Rural		Ungraded	3
Sissinghurst Castle Farmhouse	Rural		5*	7

Southgate Little Fowlers	Cranbrook		Ungraded	2
Hawkenbury Farm Bed and Breakfast	Rural		4*	2
Maytham Cottages Bed and Breakfast	Rural		4*	3
Rose House	RTW		4*	1
Brick House	RTW		4*	2
18 Strawberry Close	RTW		Ungraded	1
Broadwater	RTW		4*	4
Manor Court Farm Bed& Breakfast	Rural		3*	3
The little barn	Rural		4*	1
Granary Cottage	Rural		4*	1
Rosnaree	RTW		3*	3
Pennington Cottage	Southborough		Ungraded	1
Aspen B&B	RTW		Ungraded	2
Badgers End	Rural		2*	2
Ash Tree Cottage	RTW		Ungraded	2
Hazelwood House	RTW		Ungraded	3
Applebloom Bed and Breakfast	Rural		4*	2
Birling House Bed & Breakfast	Rural		Ungraded	2
Tolhurst Barn	Rural		Ungraded	3

Establishment - Inns	Location	Brand	Rating	No. of Rooms
Bell Inn	Rural		Ungraded	11
The Vineyard	Rural		Ungraded	4
Godhurst Inn	Rural		Ungraded	4
The Milk House	Rural		Ungraded	3
Queens Inn	Hawkhurst		Ungraded	5
The Chequers Inn	Rural	Shepard Neame	Ungraded	3

Camden Arms Hotel	Pembury		4*	15

Establishment - Motels	Brand	Rating	No. of Rooms
Forest Edge Motel	Rural	Ungraded	6