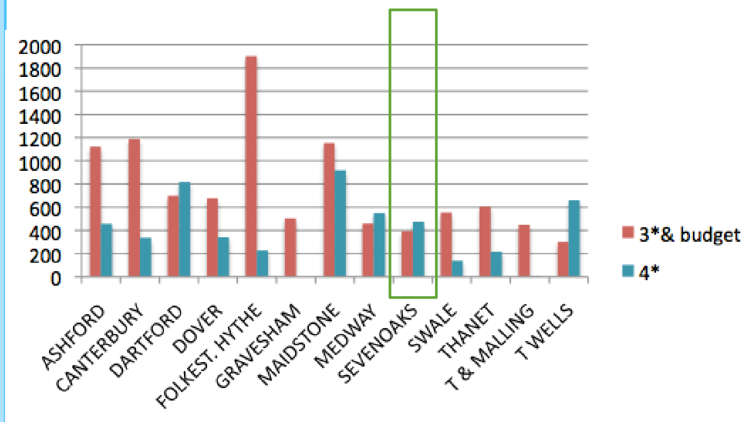
5.9a. District Dashboard Sevenoaks

Sevenoaks is at the midpoint for the county in terms of business bed-nights, although in the bottom third (11/13) for holiday nights. Sevenoaks is top of the list for total MICE capacity – however, it is only in the middle third in terms of number of MICE-ready establishments, and the lowest third in terms of group-ready tour establishments. Sevenoaks is a middle-ranking district for 4*accommodation, but ranks relatively low for 3* star and budget accommodation. A relatively high proportion of visitors to Sevenoaks district stay with friends, relatives, or in second home accommodation, at 45%, which is comparable to Gravesham (52%), Medway (50%) and Tunbridge (47%). Airbnb provision is low, with only moderate growth and a slight balance towards entire home rentals. Provision is quite widely distributed across Sevenoaks and the rural surrounds, and the **rental demand** metric is relatively low in comparison to the rest of the county.



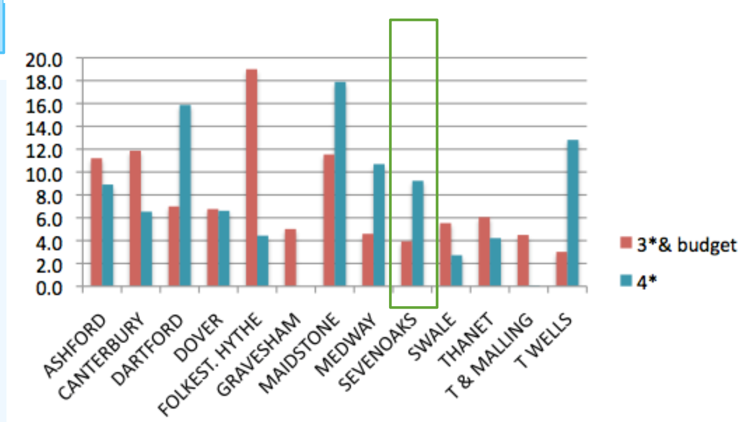
3* and 4* bed distribution by district

6/13 for **BUSINESS NIGHTS**: 186,000 bed-nights = 7.4% of total for Kent
11/13 for **HOLIDAY NIGHTS** 224,000 bed-nights = 2.8% of total for Kent

12 **MICE-ready** accommodation establishments = 6.5% of county total
Total **MICE capacity**: 2,200 = 14.6% of county capacity within accommodation establishments
Largest single MICE venue capacity: 500

Group tour-ready establishments: 5 = 5.4% of Kent total

Airbnb: 199 **ACTIVE RENTALS** with a **rental growth** of **225%** between 2016 (Q2) and 2019 (Q2). **Rental demand** 70 (10th/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

Sevenoaks district's tourism offer comprises historic towns and villages, and nationally recognised historic estates, with key heritage attractions such as Knole House and Chartwell, set in an attractive high-quality rural environment. 60% of the district is AONB designated (Kent Downs and High Weald) and 11% is covered in ancient woodland. Rural accommodation is largely comprised of independent B&Bs (a key market), and, closer to key transport routes, two of the largest branded hotels near Brands Hatch can accommodate larger numbers and the important MICE market.

Key Drivers for the Visitor Economy

Strategic policy is an important element shaping the visitor economy in Sevenoaks, linked to the wider agenda for the diversification of the rural economy. Viewed as a catalyst for diversification, the visitor economy will be key to both, post-COVID recovery and, to helping the District respond to the challenges of Brexit. There are significant concerns about how DEFRA is going to support the rural economy, and how the vacuum created by the loss of EU funding will be filled post-Brexit. Tourism is seen to be vital to the diversification of rural business models in this new political/funding landscape.

Strategically the visitor economy is also seen to be key to the development of the district's local food and drink produce and arts/cultural venues, where the trend for the desire for authentic local experiences can be capitalised upon, building a USP around local provenance.

Proximity to key markets could be considered as another key driver, fuelled on one side by the increased interest in environmental sustainability and the desire to reduce air travel – with easy access to Sevenoaks by road and rail to London and near-European markets. In contrast, the nearby developments at London Biggin Hill Airport could prove particularly pertinent to the business/MICE market, whilst the approval to take on board some air passenger travel at Manston Airport may open up some additional regional European markets.

Drivers

Main:

Location - proximity to key London markets drives a strong day visit demand.
Policy – the visitor economy is a critical component in the diversification of the rural economy and post-Brexit funding response.

Supplementary:

Policy- a growing emphasis on building the USP of the District via local provenance is creating opportunities for an enhanced tourism offer/experience.

Potential/Emerging:

Connectivity – Development of London Biggin Hill Airport and Manston Airport.
Infrastructure projects – multi-million-pound Swanley Station development.
Visitor offer – London Resort.

Gaps in Provision

Accommodation provision is currently underdeveloped, and tourism is predominantly shaped by the day-visit market. The proximity of the near-London markets makes Sevenoaks an accessible day-visit destination, but there is a view that the district needs to work on how it narrates its story to make it more appealing and competitive for overnight stays. Those coming from London don't *need* to stay, but the development of more high-quality experience-based accommodation would add value and provide that draw - the *reason to stay* overnight**.** This would also complement the wider strategic focus on diversifying the rural economy and developing a USP around the local provenance provided via local food and drink and arts/culture. Boutique-style rural accommodation offering a special overnight experience (*with a 4- to 5-star feel*) would match the quality of the environment in a district where 60% of the area is designated as AONB. The key inward investment message is, therefore, that the District would like to shift towards boutique-style rural accommodation to build an experience-led offer capitalising on local provenance. In addition to this, there could also be potential for another larger branded hotel close to key access routes as a way to spearhead new markets and provide a 'familiar branded' offer to first time visitors to the district.

Links to Key Planning and Policy Documents

Emerging Local Plan and evidence base
https://www.sevenoaks.gov.uk/info/20069131/emerging_local_plan/463/local_plan_examination_library_index_including_evidence_base_documents Access to the following key reports:

- SDC001:**Proposed Submission Version Local Plan** [key section: Policy EMP3 Tourism & Visitor Economy p.61 – sets out criterial against which new proposals for sustainable tourism development/ accommodation will be assessed].
- OD008: **Economic Development Strategy 2018-2021** [Visitor Economy one of the five themes for economic development]
- ECO004: **Sevenoaks District Tourist Accommodation Study** (Sept 2015)

Community Plan Priorities 2019-2022 https://www.sevenoaks.gov.uk/downloads/file/672/community_plan_201922 [Priority 4: Dynamic Economy]

Priority gaps

Boutique-style rural provision to add an experience-led offer drawing on the USP of local provenance

Larger branded hotel close to access routes to target first time visitors

Support for inward investment:

Enabling environment:
Sevenoaks has an open-door approach to talking to hotel developers.

Joint ventures:
The district works in partnership with SELEP which has investment strategies.

Once the COVID Recovery Strategy has been formulated, Sevenoaks will have a clearer view on potential direct/indirect inward investment incentives.