

## SEVENOAKS DISTRICT TOURIST ACCOMMODATION

Economic & Community Development Advisory Committee - 17 March 2016

Report of Chief Officer - Communities & Business

Status: For Consideration

Key Decision: No

---

**Executive Summary:** This report summarises the Economic Development aspects of a study by Hotel Solutions into tourist accommodation in the District.

Members are asked to note this report.

---

**This report supports the Key Aim of Retaining existing businesses and encouraging new businesses**

**Portfolio Holder** Cllr. Roddy Hogarth

**Contact Officer** Hayley Brooks Ext.7272

---

**Recommendation to Economic & Community Development Advisory Committee:**

That the contents of the report be noted.

---

### Introduction and Background

- 1 Hotel Solutions were commissioned in 2015 to undertake a study of tourist accommodation in the Sevenoaks District.
- 2 This report covers current supply, local drivers of demand growth and a review of national trends in hotel and visitor accommodation development and staying-tourist markets.

### Current Tourist Accommodation Supply

- 3 There are currently 99 tourist accommodation establishments in Sevenoaks District offering approximately 1,123 bedspaces. The greatest bedspace capacity is in serviced accommodation, with hotels accounting for 33% of the District's total bedspaces, guest houses and B&Bs 18 % and inns 12%. Self-catering accommodation makes up 15% of the total tourist accommodation supply, while touring caravan and camp sites account for only 5% of total stock.
- 4 The District only has two small glamping sites. It has two residential conference and study centres, two bunkhouse barns and a naturist spa

resort. It has no mainstream spa resorts/health farms, camping pod sites, holiday lodge complexes/ holiday lodge parks, or caravan holiday home parks.

- 5 There are concentrations of tourist accommodation in and around Sevenoaks Town, the Edenbridge/Hever area and the Brands Hatch area. The quality of tourist accommodation in the District appears to be good. There is very little boutique tourist accommodation in the District. Tourist accommodation businesses are generally small-scale operations. There is only one large hotel with more than 100 bedrooms - The Brands Hatch Hotel. Other hotels are all small to medium-sized properties. The Kings Arms Hotel in Westerham and Leicester Arms Hotel at Penshurst are larger inns.
- 6 Hever Castle Luxury B&B stands out as a large, luxury B&B operation, with 28 guest bedrooms. Other B&Bs are very small. The District's self-catering accommodation supply is predominantly in single units. The District has no holiday cottage complexes with leisure. There is only one large 'super' cottage that can cater for family and friend get togethers. Accommodation that is adapted for disabled people is very limited.
- 7 There has been relatively little change to the District's tourist accommodation supply in the last 5 years. The most significant changes have been: the opening of the Premier Inn at Swanley in 2012; the repositioning of The Leicester Arms Hotel at Penshurst as a gastropub with boutique bedrooms in 2013; the opening of the luxury B&B accommodation at Hever Castle in 2012 and subsequent expansion in 2015; and the conversion of the Hever Hotel to the Chateauform residential conference centre in 2011.

## **Hotel Markets**

- 9 Business class hotel performance was very strong in 2014 in Swanley and Tonbridge. Business class hotels in these locations consistently filled and turned significant business away on most nights of the week, other than Sunday, for much of the year.
- 10 Average room rates are high for Swanley and Tonbridge business class hotels and above the levels achieved by most of the District's 3/4 star hotels.
- 11 Room occupancies have strengthened for the District's 3/4 star hotels but remain slightly below national provincial chain hotel averages. Quality issues with some hotels appear to be a key factor limiting their ability to achieve higher room rates. Some have seen an uplift in room rates. Others have dropped room rates and taken more business from lower-rated markets.
- 12 Current midweek markets for the District's hotels are:
  - Local corporate business - for all standards of hotel;
  - Contractors for business hotels and some 3 star hotels;

- Residential conferences for country house, and to a lesser extent 4 star hotels;
- Spa breaks for country house hotels;
- Midweek breaks for some 3/4 star hotels, primarily driven through special offers and deals;
- UK and overseas tour groups in the summer months for one hotel;
- Overseas tourists for one 3 star hotel
- Midweek business from Brands Hatch for one hotel in terms of motor racing teams practising or testing cars and people coming for driving experiences on the track.

13 Current weekend markets are:

- Weddings parties;
- Weekend leisure breaks;
- People attending events at Brands Hatch and other events in the area. There are only two major events at Brands Hatch that generate demand for hotels across the District.
- People visiting friends and relatives - a key weekend market for business class hotels;
- Overseas tourists during the summer.

14 The business class hotels in Swanley and Tonbridge consistently turn away significant business on all four midweek nights and Saturday nights throughout the year, and Friday nights between April and October. There is evidence of shortages of hotel accommodation in Sevenoaks Town and Westerham on Monday, Tuesday, Wednesday and Saturday nights. The District's 4 star and country house hotels only consistently turn business away on Saturday nights between April and October.

### **Future Demand Prospects**

15 There are good prospects for future growth in demand for all forms of tourist accommodation in Sevenoaks District. The District is well placed to benefit from national trends in terms of:

- The continued growth in demand for domestic short breaks from people in their 50s and 60s whose children have left home, family and people born in the 1980s and 1990s who are now in their 20s and 30s.
- The growth in demand for leisure trips linked to visits to friends and relatives.

- The increasing interest in activity holidays and breaks and spa breaks.
- The growth in demand for intergenerational family holidays and breaks.
- The trend for families and friends to get together for celebration weekends, reunions and weekends away.
- The growing market requirement for high quality, distinctive and contemporary accommodation.
- The increasing importance of online marketing and booking channels and social media for short break decision making and planning, enabling accommodation businesses to reach customers much more cost effectively than they have ever been able to before.

In terms of growth prospects by market:

- Corporate demand for hotel accommodation should grow in line with economic growth in the District and surrounding area. The huge amount of office space that is planned at Ebbsfleet Valley and redevelopment of Fort Halstead will be key drivers of growth in corporate demand in the north of the District.
- The construction of the Paramount London Resort and Ebbsfleet Valley, together with the development of Fort Halstead, the hotel planned at the London Golf Club and regeneration projects in Swanley and Sevenoaks are likely to result in a significant increase in demand from contractors for business class hotel accommodation.
- Existing and new 4 star, boutique and country house hotels in the District with good conference facilities should be able to benefit from the continuing recovery and renewed growth in the residential conference market.
- There is good potential for high quality tourist accommodation businesses in Sevenoaks District to target the UK leisure break market for both midweek and weekend business.
- The opening of the Paramount London Resort, potentially in 2020, will result in a step change in demand for family breaks in Sevenoaks District for tourist accommodation businesses that can cater well for this market.
- Overseas tourist demand for high quality tourist accommodation in Sevenoaks District should grow as inbound tourism to London, Kent and the South East.
- There is scope for growth in UK and overseas tour group demand for larger full service hotels in the District that want to use this market to boost off-peak periods. This is however low-rated business that hotels will generally

limit, particularly if they are able to attract demand from higher paying markets.

- Demand from wedding parties and people visiting friends and relatives should grow as the District's population increases.

### **Tourist Accommodation Development Trends**

16 The study identified the following trends in rural tourist accommodation development in the UK:

- The continuing success and expansion of business hotel chains.
- The development of boutique hotels, inns, restaurants with rooms, B&Bs and self-catering accommodation in market towns and rural areas - trends that are beginning to emerge in Sevenoaks District.
- New luxury and boutique country house hotels.
- The development of hotels and holiday lodges on golf courses.
- The conversion of redundant farm and rural buildings to holiday cottages and holiday cottage complexes, in some cases with leisure facilities.
- The development of large 'super' cottages that can cater for the growing demand for family and friend get-togethers and celebrations.
- The development of holiday lodge complexes and small-scale holiday lodge parks.
- The development of fishing lodges.
- Eco camping.
- The increasing provision of camping pods.
- The rapid development of glamping

### **Tourist Accommodation Development Opportunities in Sevenoaks District**

- The District is well placed to capitalise on the projected growth in the domestic short break and overseas tourist markets;
- The projected population growth in the District will drive growth in weddings business and visits to friends and relatives;
- Growing contractor demand for business class hotel accommodation as the major construction projects are progressed in surrounding areas and within the District;

- Depending on demand from walkers there could be a need/ opportunities for further accommodation provision along the North Downs Way National Trail and Greensand Way, in terms of pub accommodation, B&Bs, camp sites and possibly a network of camping pods.

### **Capitalising on the Opportunities - The Role of Sevenoaks District Council**

17 Consideration could be given to:

- A planning policy position relating to tourist accommodation development and retention.
- More proactive support by, for example engaging with accommodation owners, identification of properties that might potentially be suitable for conversion to boutique hotels; development of a tourism business prospectus
- Encouraging a more strategic approach to the allocation of public sector funding for tourist accommodation development schemes through the West Kent LEADER Programme and other EU Government funding that may be able to support tourist accommodation in the District
- Providing further information and advice to those that might be considering tourist accommodation development proposals in the District.
- .The provision of business and marketing support for tourist accommodation operators.

Action to grow the staying visitor market in the District through effective destination marketing and leisure tourism product development focused on boosting demand at the times when tourist accommodation establishments most need additional business.

### **Next Steps**

- 18 The Tourist Accommodation Study provides a snapshot of the District's tourist accommodation sector and its development potential at one point in time. Moving forward it will be important for the District Council to monitor how the sector is developing and performing over time to establish ongoing priorities for the further development of tourist accommodation, and to evaluate the impact of any interventions to proactively support the development of the sector. This can best be achieved through periodic in-depth research, rather than ongoing surveys, which are very time consuming and costly to deliver.
- 19 With a currently limited stock of tourist accommodation, it is clear that growth in staying tourism, and the resulting boost that this will give to the District's economy, would require additional tourist accommodation. The Tourist Accommodation Study shows potential for a wide range of different types of tourist accommodation across the District. While the market may begin to deliver new supply, there is much that Sevenoaks District Council can do to accelerate tourist accommodation development through a

positive, flexible and enabling planning policy framework, investment and proactive interventions to raise awareness of the opportunities and provide support.

## **Key Implications**

### Financial

There are no financial implications associated with this report.

### Legal Implications and Risk Assessment Statement.

There are no legal or human rights issues relating to this report.

### Equality Assessment

The decisions recommended through this paper have a remote or low relevance to the substance of the Equality Act. There is no perceived impact on end users.

## **Conclusions**

The Tourist Accommodation Study sets out future growth prospects for tourist accommodation in the Sevenoaks District. The District is well placed to capitalise on projected growth in the domestic short break and overseas tourist markets.

**Background Papers:** Sevenoaks District Tourist Accommodation Study

**Lesley Bowles**  
**Chief Officer Communities & Business**