

Sevenoaks Visitor Economy Survey

An overview presentation
by
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Travel Market

1. Global Travel Market

- a) Very robust
- b) Destinations Worldwide up 6% in the first half of 2017
- c) Better than the 4.5% per annum level seen since 2010

2. Europe Travel Market

- a) Overall, up 8% in January to June 2017
- b) 231 million arrivals (this is 17 million more arrivals than same period in 2016)

3. National

- a) UK is reporting a 9% increase in January to June 2017 over the same period last year
- b) Tourism receipts are up 11% in the period January to March 2017 vs same period in 2016

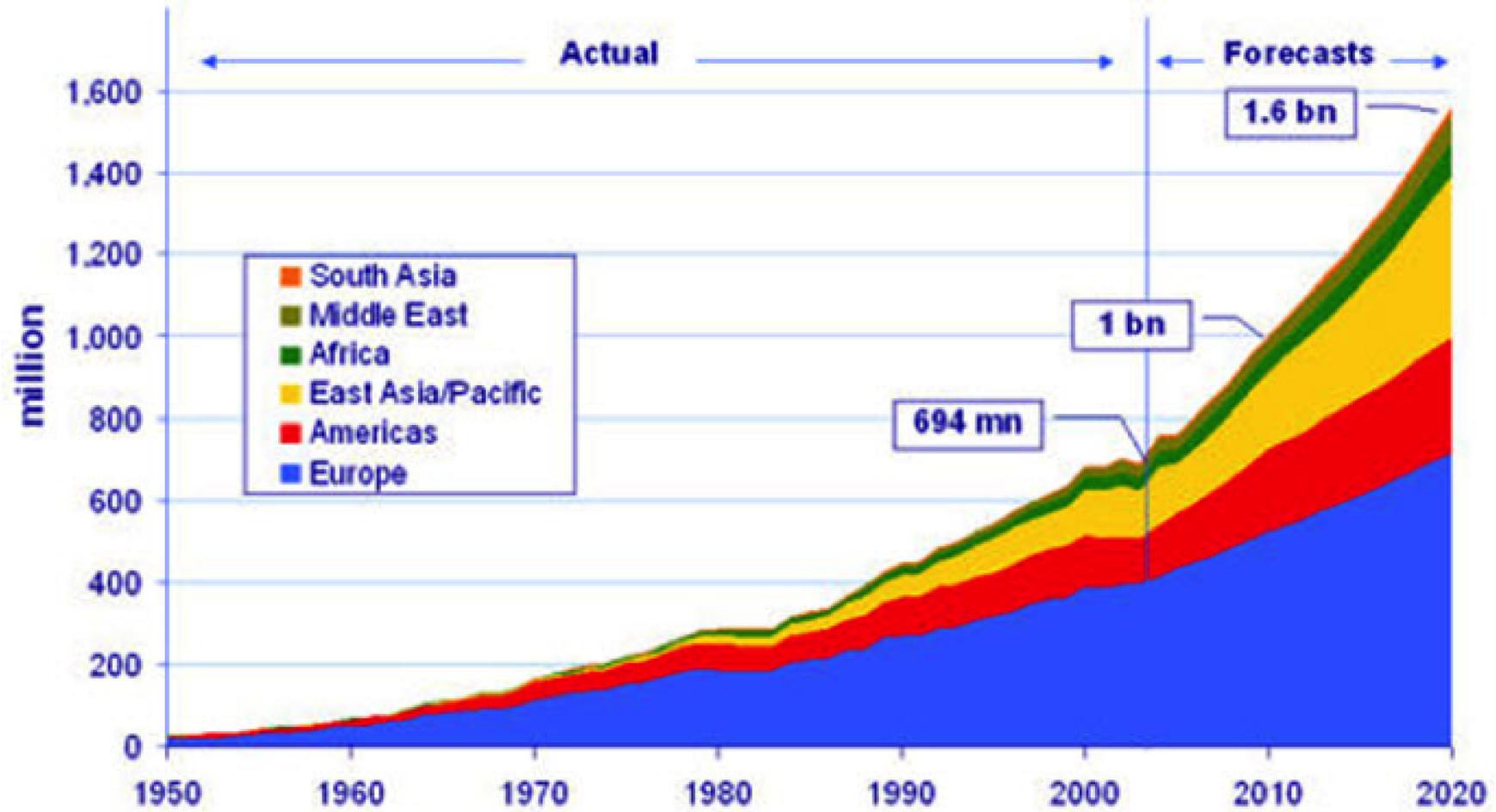
4. Source Market Spending Growth in the period January to June 2017 vs 2016

China	9%	Italy	5%
USA	6%	Canada	7%
Germany	3%	Spain	17%
France	11%	Portugal	13%
Korea	16%	Hong Kong	5%
UK	9%		

5. District

- a) Most Operators were hoping for at least 4-5% growth this year over last
- b) Only 10-15% of visitors to the region come from overseas

Global Market



Constraints on growth

- Physical Capacity
- Planning Restrictions
- Marketing Costs
- Ambition

1. Profitability is more important than absolute growth in visitor numbers
2. No desire for attracting volume tourists or a West Kent wide branding exercise
3. Clear desire for Operators within close proximity to leverage off one another (e.g. Darent Valley and Eden Valley)
4. There is a strong feeling that an unsustainable dash for greater numbers of tourists could disrupt the region's integrity including its historic, environmental and cultural assets. The very things that attracts visitors need to be closely protected
5. Widespread, growing belief that visitors, increasingly driven by millennials, want a memorable experience during their visit. They are discerning. The "experience economy" is making itself felt in West Kent. Events attract visitors and Operators need support (Planning flexibility) in hosting such events
6. The use of Social Media is a requirement, but can be a double edged sword
7. Food quality and traceability is growing in importance, driven by Social Media, food programmes and concerns for general well-being (health and fitness)

Transport

- 1. It is impossible to discuss Tourism without discussing transport links**
- 2. Disruption (e.g. Uber) in the Transport sector will impact/is impacting the way in which people travel**
- 3. Our existing rail links are under-utilised off peak. Few tourists use rail at the present time, preferring instead to use cars**
- 4. Better links, including cycle and walking paths plus better mapping of the area at railway stations could encourage greater train use**
- 5. For cars, over time we must expect the growth in electric and driverless vehicles and thus a significant need for well-distributed charging stations**
- 6. Again over time, we could also see a decrease in car ownership coupled with more “Uberisation”. This would result in less need for parking spaces**

Cycling

- 1. West Kent with its hills and scenery is one of the most popular cycling areas in England being so close to London and being reasonably well populated in its own right**
- 2. The popularity of cycling is growing at more than 20% per annum. Increasing road use is seemingly unstoppable**
- 3. Central Government is keen to promote greater cycle use**
- 4. Electric bikes could be the next big thing, broadening even further the demographics of the cycle population. Such bikes will give users an extra 20% reach on flat areas**
- 5. Operators do not extract huge value from cyclists, largely because at the present time cyclists are time-pressed. This could change**

Signage

1. **Tourists frequently get lost and blame Operators for the lack of signage**
2. **Many Operators have expressed frustration over the time and cost to secure approval for signage**
3. **Brown signs are prohibitively expensive**
4. **Many would like to see consistency in Sign type and style**
5. **The general view is that Kent County Council could more helpful here**

A Sense of Place

- 1. Many Operators expressed a desire to protect and promote a unique sense of place in the District**
- 2. The Darent Valley feels a palpable sense of pressure from increasing urban sprawl and along with the Darent Valley Partnership would like to have their own unique signage to inform visitors where they are**
- 3. Eden Valley Operators also want to promote a “sense of place” in their valley. They are currently discussing ways for their 24 pubs to co-operate in establishing walking/pub trails**
- 4. All four towns, Edenbridge, Westerham, Swanley and Sevenoaks struggle to attract and hold visitors in their High Streets. The downturn in retail shopping is presenting new challenges to Local Governments**

Recommendations (1)

1. Pursue potential funding from Whitehall's recently released Plan for Cycling and Walking to improve paths from local railway stations to nearby visitor attractions
2. Consult with local communities about localised issues such as the installation of a zebra crossing across the A225 at Eynesford Station
3. Form a working party with the Train Operators and Technology Companies to help revive the use of our smaller stations to encourage off peak travel. In particular, we work in conjunction with Sevenoaks Town Council, local town and parish councils, Thameslink, Network Rail and the Darent Valley Landscape Partnership to extend the regeneration of the Thameslink line stations in the Darent Valley
4. Discuss with local residents and Southern Railway the long-standing issue of the name of Penshurst railway station
5. Gain support from SDC officials to actively help in negotiations with KCC Highways to shift control and expense of all signage, including Brown signs, to SDC. This would help us create our own heritage signage, which is instantly recognizable to all visitors for all our District attractions and services

Recommendations (2)

6. Investigate low-level support to our Operators on a local rather than a District wide basis. This could be signage or assistance in developing visitor trails, including well defined walking or driving routes for gardens, historical interests, or pubs
7. Instigate a study on the future requirements and location of charging stations for electric cars and bikes
8. Include the future implication of cycling economy into the Local Plan
9. Explore potential options for the establishment of a high-end hotel to serve both visitors and the business travel market.