



REPORT MARCH 2017



TOWN
CENTRE
INTELLIGENCE



ROYAL TUNBRIDGE WELLS
TOGETHER

This report provides information for Royal Tunbridge Wells Together members, relating to the performance of the town centre.

Information in this report collected: 2 February - 15 February 2017.

TOWN CENTRE ACTIVITY

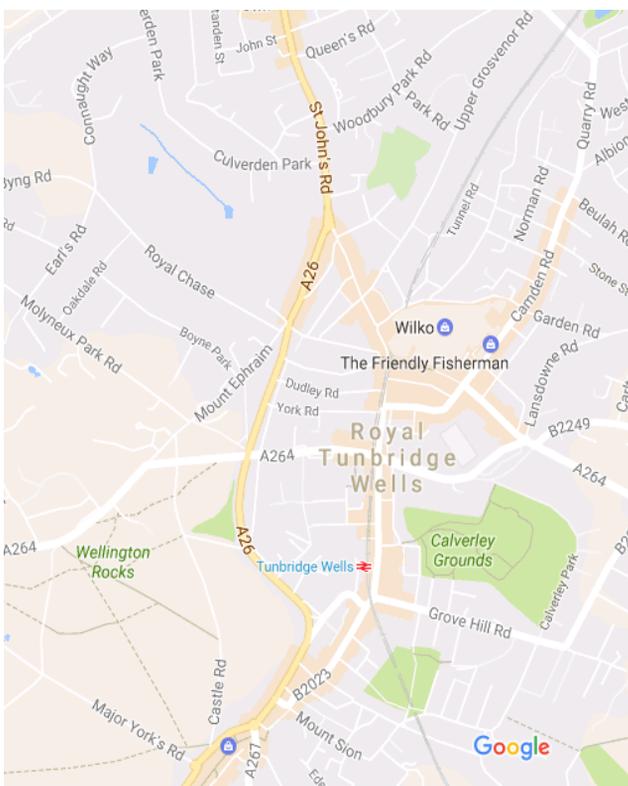
Footfall counts are not currently undertaken in the town centre. However, the table below provides an indicator of activity within the town centre.

Location	Apr-Jun 2015	Jul-Sept 2015	Oct- Dec 2015	Jan-Mar 2016	Apr-Jun 2016	Jul-Sept 2016	Oct- Dec 2016
TIC	8,161	7,733	5,192	4,272	4,407	8913	4953
Trinity	12,174	8,449	20,836	16,615	10,900	8,077	14,344

*Tourist Information Centre

These figures show the variation in transactions for the 12 car parks in the town centre. This includes both pay by phone and ticket machine payments.

	Apr-Jun 2015	Jul-Sep 2015	Oct-Dec 2015	Jan-Mar 2016	Apr-Jun 2016	Jul-Sep 2016	Oct-Dec 2016
Car Parks	472,683	460,404	545,787	509,623	481,896	487,275	561,856



CAR PARKING CONSULTATION
 Many residents and business owners have been concerned about the recent changes. TWBC and RTWT are engaged with them about the changes and are in ongoing discussion.

CCTV
 TWBC is proposing changes to CCTV monitoring in the town centre. RTWT is engaged in this discussion.

NEW OPENINGS

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Dassie Artisan — hand made, African inspired homewares located in Royal Victoria Place.

Gandy's — clothes and travel shop that donates 10% of their profits to helping those affected by the 2004 Tsunami, located in Royal Victoria Place.

Wilko's — promotes family value and affordable products nationwide. They have a wide range of hardware, homeware and garden products, located in Royal Victoria Place.

The Range — everything for your home, leisure, and garden, located on Vale Road opposite Tunbridge Wells Station.

Sankey's Fish Restaurant — expanded the business with a new premises on Camden Road.

The Beer Boutique — a specialist beer retailer from around the world, located on Mount Pleasant.

The Vault — 1920s themed bar on Vale Road.

Framptons — local eatery serving high quality food and drink in the Pantiles.

Pantiles Café — stylish café in the centre of the Pantiles.

Prohibition Vapes — vape lounge on Camden Road.

Swirls Café — ice cream and pancake parlour on Camden Road.

The Plant Base — healthy eating café on Camden Road.

Edney and Edney — high quality opticians located on Monson Road.

Foodies Delicatessen— family run delicatessen on Camden Road.

Tuck in — Sandwich bar offering breakfast and lunch options on Camden Road.

COMING SOON...

Marlow's Burger Bar — a brand new burger bar on Calverley Road.

Cream's Café — ice cream and pancake parlour taking over the old Cosmo site on Grosvenor Road.

Coco Retro — owners of Sopranos in the High Street opening a French restaurant on Vale Road.

Foodies Delicatessen—
“Having grown up in Kent I always saw Royal Tunbridge Wells as a special place, I now feel quite honoured to open 'Foodies Delicatessen' on the vibrant Camden Road!”

Dassie Artisan-
“We moved to Tunbridge Wells 4 years ago and instantly fell head over heels. It is such a lovely, vibey little town which we are so happy to call home. We opened our very first Retail store inside RVP to showcase all of the Fairtrade products we design and develop, produced by Artisans based in the developing world. It has been such an amazing opportunity to get in front of our direct consumer and receive real time feedback, which has been so wonderful and positive!”

NEW DEVELOPMENTS

Royal Victoria Place Redevelopment-

Planning permission was granted in 2016 for a £70 million extension to the Royal Victoria Place shopping centre. More than 140,000 sq ft of new retail, food and beverage space and a new 30,000 sq ft cinema will be added to the existing centre. The corner of Calverley Road and Camden Road will be redeveloped with new buildings and a new entrance. This re-development is expected to create around 275 new permanent jobs, and will have economic benefits for the rest of the town. The development is expected to be completed in 2019.

Dandara Union House- Planning permission was granted in January 2017 for the demolition of the existing Union House building at the southern end of the Pantiles and the redevelopment of the site to provide 127 residential apartments, alongside ancillary retail community and office floorspace. The public realm will be improved with a new public square, water feature, public car parking and residents car and cycle parking.

The House- Opened in early October 2016, this creative workspace provides affordable and flexible desk space and event space for small businesses, freelancers and start up businesses in the creative sector. The project is a partnership between Tunbridge Wells Borough Council, Kent County Council and Workspace Collaborations Limited (local creative businesses). The aim of the project is to support local creative businesses and to provide a focal point for in the sector in the Borough. There are 50 desk spaces and 20 co-working (hot desk) spaces, and the space is currently 70% occupied. There is also access to shared facilities such as a large kitchen and decking area in the garden. The House is located on Monson Road, on a private road behind the ASK restaurant.

Belvedere Complex- better known in the town as the 'Old Cinema Site', Altitude Real Estate Ltd purchased the site in April 2016 after the existing cinema building was demolished (in 2013). After consultation with the local community, proposals have been developed for a mixed use development that will comprise residential (80-100 units), retail, leisure and commercial uses. The site will be named 'Belvedere, Royal Tunbridge Wells' (Italian translation of 'fair view'). A detailed planning applications is anticipated to be submitted in May 2017.

Cultural and Learning Hub- Tunbridge Wells Borough Council (TWBC) and Kent County Council (KCC) are working together to create a new Cultural & Learning Hub for Tunbridge Wells. This redevelopment brings together in one conserved and modernised set of buildings the Museum, Art Gallery, Library, Adult Education, Visitor Information and Gateway services. The aim is to create a space to engage with the heritage of Tunbridge Wells, learn new skills, socialise and be inspired. This project has received first stage passes from both Heritage Lottery Fund and Arts Council England and the Stage 2 submission for funding will be made in August 2017.

The Civic Complex- Background work is continuing on plans for a new theatre and council offices in the town centre on the Great Hall car park and Mount Pleasant Avenue car park sites respectively. The proposed new theatre will have a capacity of 1,200 seats, and will have the ability to attract high class touring shows from across the country. The new theatre is expected to bring positive multiplier financial benefits of around £15-18 million, whereas the current theatre brings in about £4million. The new Council offices would provide additional office space for business use. If a decision is taken to proceed following Stage 3 work, the programme provides for a planning application for a new theatre, office and car park to be submitted in autumn 2017.

VACANCIES

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The following table shows the location and number of vacant units in the town centre.

Road Name	Number of Open Units	Number of Vacant units	Total
Grosvenor Road	69	7	76
Calverley Road	55	8	63
Camden Road	47	4	51
Monson Road	29	5	34
Mount Pleasant Road *	38	5	43
High Street	67	6	73
Castle Street	11	0	11
Vale Road	31	4	35
Chapel Place	16	0	16
Pantiles	40	3	43
RVP	83	8	91
Ely Court **	5	8	13
Total	491	58	549

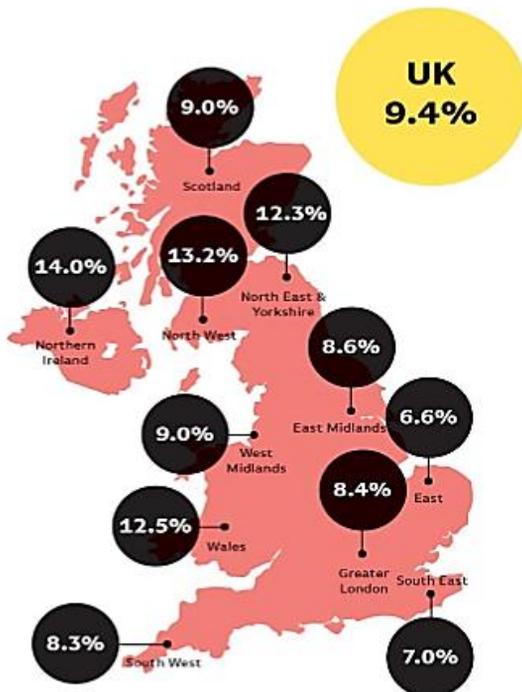
* This does not account for the redevelopment area of the 'old ABC cinema site'

** The vacant units in Ely Court have been kept vacant due to the redevelopment of Royal Victoria Place, which will utilise these units.

The overall vacancy rate in Tunbridge Wells is 9.3%, which is slightly lower than the national average. This is not including Ely Court, as the vacant units in this area will be included in the redevelopment of Royal Victoria Place shopping centre. When the survey of the town was conducted however, it was recorded that a number of the vacant sites are set to filled in the near future.

NATIONAL AVERAGES

The following information has been collected from Springboard



UK RESULTS

NATIONAL AVERAGE

The National Town Centre Vacancy Rate was 9.4% in January 2017, down from 9.5% in October 2016. This marks the second consecutive quarter that the vacancy rate has fallen. Tunbridge Wells is therefore in slightly under national trends.

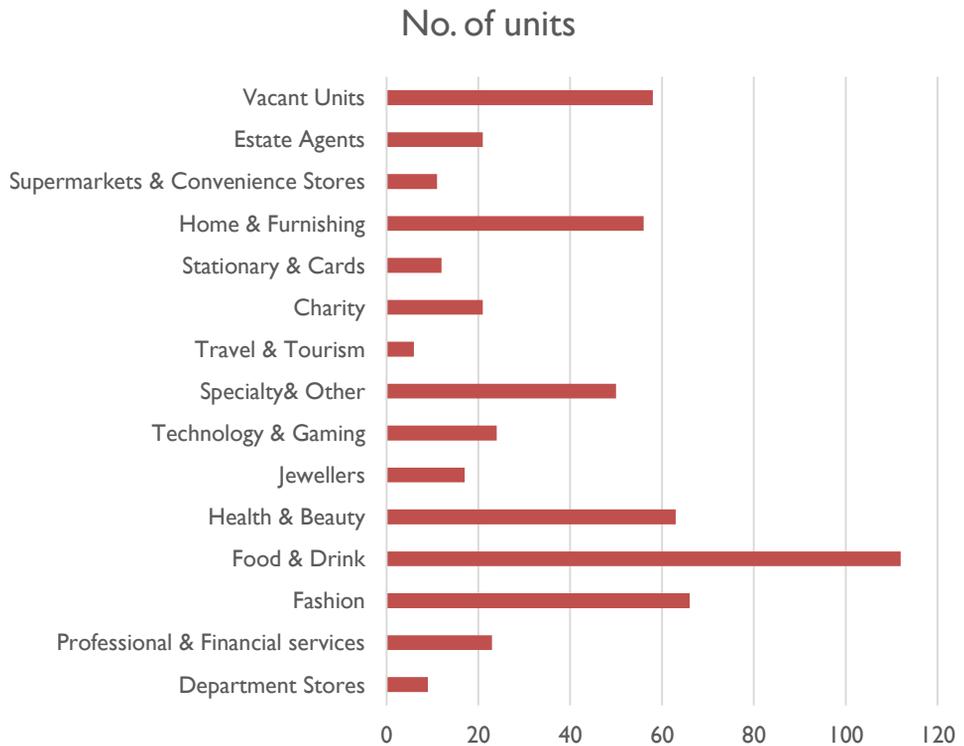
The data collected shown on this map is from January 2017

PREMISES TYPES

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The following table and graph show the different premises types in the town centre.

Business Premises Type	No. of units
Department Stores	9
Professional & Financial services	23
Fashion	66
Food & Drink	112
Health & Beauty	63
Jewellers	17
Technology & Gaming	24
Specialty & Other	50
Travel & Tourism	6
Charity	21
Stationary & Cards	12
Home & Furnishing	56
Supermarkets & Convenience Stores	11
Estate Agents	21
Vacant Units	58
Total Open Units	491
Total Units	549

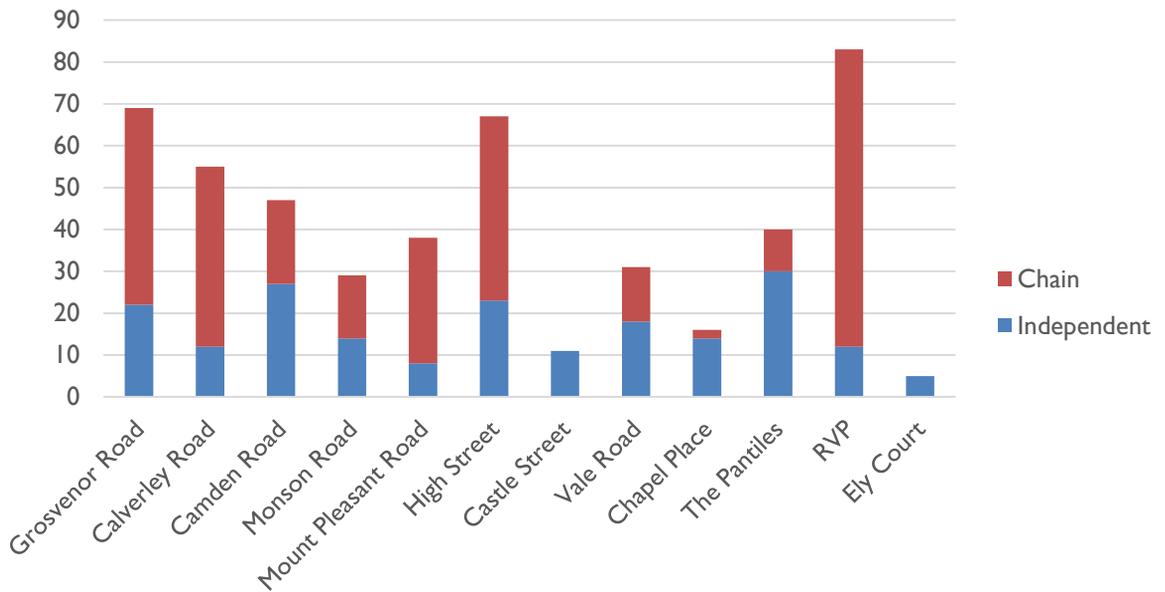


INDEPENDENTS v CHAINS

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The following graph and table show the independents v chains in the town centre.

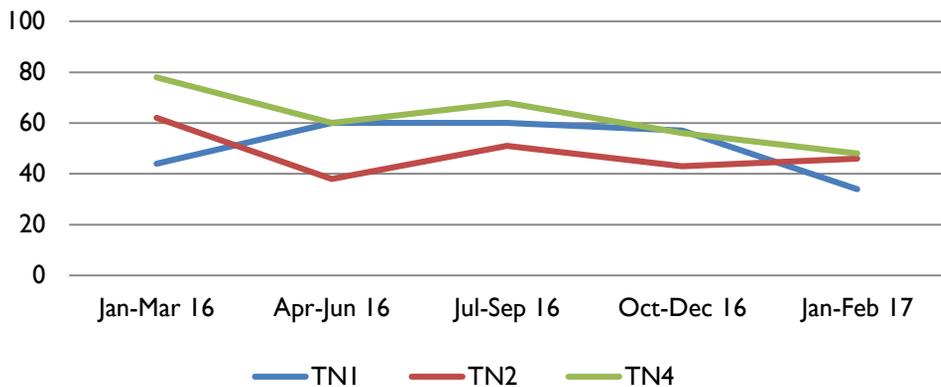
Independent v Chain	Independent	Chain	Total
Grosvenor Road	22	47	69
Calverley Road	12	43	55
Camden Road	27	20	47
Monson Road	14	15	29
Mount Pleasant Road	8	30	38
High Street	23	44	67
Castle Street	11	0	11
Vale Road	18	13	31
Chapel Place	14	2	16
The Pantiles	30	10	40
RVP	12	71	83
Ely Court	5	0	5
Total	196	295	491



BUSINESS START-UP RATES

This table shows the number of businesses that have started up across the town centre over the last year

	TN1	TN2	TN4	Total
Jan-Mar 16	44	62	78	184
Apr-Jun 16	60	38	60	158
Jul-Sep 16	60	51	68	179
Oct-Dec 16	57	43	56	156
Jan-Feb 17	34	46	48	128



Data collected from from The Information Point at Kent County Council.

CONCLUSION

TWBC has also recently commissioned a Retail and Leisure Study as part of the evidence base for the Local Plan. The emerging findings have concluded that Royal Tunbridge Wells is a key retail and leisure centre in the borough. The town centre compares well to other retail centres in the region, the main competition being Guildford and Maidstone. The retail offer is considered to be of 'upper middle' classification, with a wide range of high quality shops. As well as hosting a wide variety of chain shops in the town centre, the Pantiles and High Street complements the top of town by offering a wide range of independent retailers. Footfall increased in the town centre.

The results from the emerging Retail and Leisure Study broadly correspond with the findings from the Business Intelligence Report. The Tunbridge Wells town centre is host to a healthy retail economy and ranks highly compared to other shopping destinations in the region. There is a good variety of shops within the town centre, both chains and independents, which is likely to be further boosted by the redevelopment of Royal Victoria Place and The Belvedere (old cinema site) in the near future. The Retail and Leisure Report will be published on the TWBC website in due course.

Please see the Royal Tunbridge Wells Together website for links to useful sites for more information. <http://www.tunbridgewellstogether.co.uk/business-information/useful-links/>