

Tunbridge Wells Borough Factsheet

The Experiential Offer – Opportunities & Gaps

September 2020



The following factsheet will review:

- ✓ Key trends that resonate with the Tunbridge Wells Borough offer
- ✓ Area product strengths & opportunities
- ✓ Building on the current product for Tunbridge Wells Borough
- ✓ Tunbridge Wells Borough specific :
 - ✓ Opportunities & examples
 - ✓ Gaps & considerations
- Appendix :
 1. Engaging the visitor with the landscape
 2. Kent experience product snapshot grid - highlighting seasonal opportunities

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Key trends that resonate with the Tunbridge Wells Borough offer

Tunbridge Wells Borough is known for its Georgian gentrification and royal spa status, along with stunning heritage properties and the Wealden countryside. The borough also offers a wide range of activities from sailing and mountain biking to rock climbing and curling; or if potential visitors are looking for something a little more relaxing, there is a range of spa and pampering treatments and the opportunities for self-improvement, whether its expanding your wine knowledge or perfecting your pianist skills.

From recent research we already know that:

- ✓ **BOOK IN ADVANCE** - When booking an experience, 65% of of the domestic market book before leaving home.
- ✓ **WILL TRAVEL UP TO 1 HOUR** - Approximately 80% of customers looking to book an experience are prepared to travel up to an hour, any longer and the % drops dramatically.
- ✓ **EXPERIENCES INFLUENCE DESTINATION CHOICE** - Nearly 60% of the domestic market are influenced by an experience when selecting a destination

Key Trends:

Local & Authentic – The visitor is looking for an authentic experience, where they can feel less like a tourist and more like a local. In the search for authenticity, the most popular experience is one that takes them behind the scenes to gain an insight into a different way of life/ culture or industry.

Transformative Travel – Is an experience that leaves us ‘positively’ changed, this can be through education, wellbeing & mindfulness and is often linked to retreat and educational activity – this has been flagged by trip advisor as one of the growth areas for 2020 onwards.

Engaging with the countryside – accentuated by lockdown, there is an increased desire to get out into the countryside and increase our horticultural and agricultural knowledge.

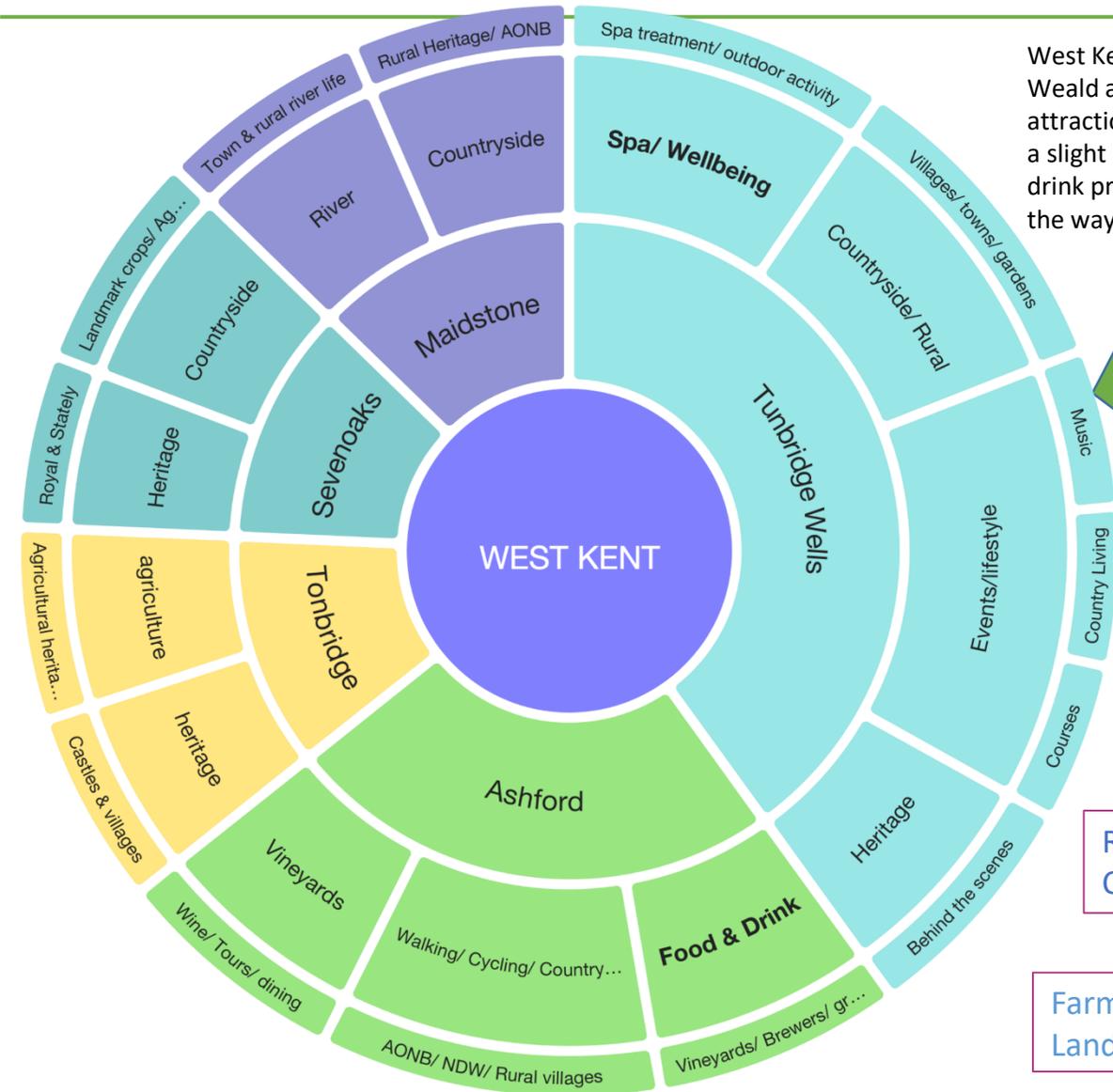
What is Wellbeing tourism? By definition, wellbeing is – being comfortable, healthy and happy. In relation to a travel experience this can range from relaxing on a spa day, taking in the stunning views on a walk or enjoying a well-cooked meal. It is somewhat of a misconception that travellers who engage with wellness products are a small elite group. The reality is, this segment only constitutes 11% of the market, the majority of visitors that book a wellness/ spa treatment do it as part of a wider, multiactivity stay. Product development that links to the wellness trend offers considerable opportunity, as it can be the glue that links multiple experiences together to form a short break.





Strengths & opportunities for West Kent and Tunbridge Wells Borough

West Kent is dominated by a strong rural countryside product, thanks to a considerable proportion falling into the High Weald and North Downs AONB, offering an excellent opportunity around outdoor activity. The area is rich in heritage attractions along with an appealing rural towns/villages product. Sometimes however, this strength of heritage, can be a slight hindrance when trying to establish an immediacy to travel. Opportunities around the growth of the food & drink product, year-round accessibility to the vineyards along with wellbeing and self-improvement offer could refresh the way the customer sees the destination .



Wellbeing– Relax – reconnect, recharge: pamper/ creativity

Getting closer to Nature/ learning new skills

Retreats, spas, being looked after

Walking and Cycling / outdoor activity to recharge

Green Finders – The next step to engage with the gardens

The garden year course – with Head Gardeners

Grow your own –small space veg growing

Food & Drink

Guided tours/ culinary courses/ foraging

Vineyards, breweries, cider makers etc

Rural Culture & Country Living

Lifestyle events – music/ arts

Country Living Lifestyle – interiors/ crafts etc

Farming Landscape

Agriculture – Farm experiences/ accommodation

Horticulture – Learning from growers – follow the cycle of the crop



Building on the current product for Tunbridge Wells Borough

Transformative and wellbeing focusing on recharge, relax and renew, to find yourself and to reconnect: via a spa day, an activity break, an educational or lifestyle course.

Food miles and gastro pubs – The Borough is known for heritage villages & towns; where in many instances the heritage pub/ tearoom offer is the only economic engager for the day visitor. Greater focus on the local food producers and telling their story, highlighting seasonality can create a reason to travel. Also food & drink courses score high in all research.

Behind the scenes VisitEngland research highlighted that gaining a ‘behind the scenes’ experience was the no.1 activity for international visitors. But this isn’t the blue badge house tour – it has to offer an element of exclusivity.

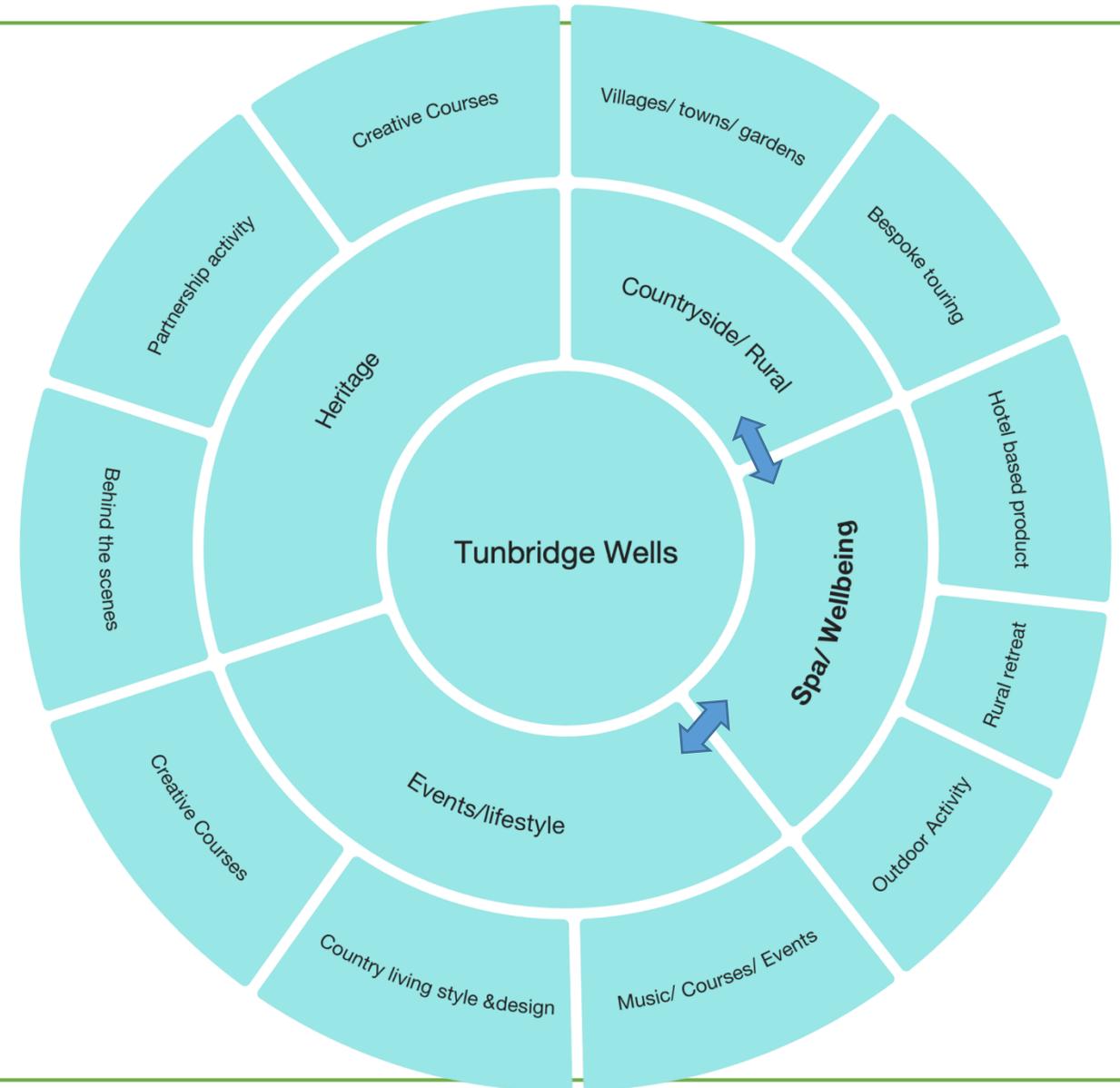
Greenfinders– Who better to learn from than the experts, in an environment that is surrounded by authenticity. Head gardener courses are an activity delivered by the NT predominantly Jan – Mar when the properties are closed.

Concierge travel– There is such a desire to get off the beaten track that more and more visitors are turning away from large group travel. Consumers are opting for small or family bubble groups creating greater flexibility around tour content.

Lifestyle Travel– This is the next step on from the country living day trip event – to learn a new skill and gain an insight to new areas of lifestyle and design. -



Strengthened and enhanced via a sustainable commitment





Tunbridge Wells Borough experience product opportunities

Tunbridge Wells, Cranbrook, Hawkhurst, Villages: Product Strengths: All product that can link and support a destination wellbeing message – Spas, health, outdoor activity, personal learning. Countryside, rural villages and town-based heritage, castles, gardens and stately homes. Tunbridge Wells, The pantiles, unique events e.g. The Puppetry Festival.

Experience	Lead Opportunity underutilised at present	Product example
Spa/ Well being	<p>Having the historically recognised spa town of Royal Tunbridge Wells at the heart of the Borough, gives any product proposition based around a spa and wellbeing a level of authenticity.</p> <p>There is a quality spa offer with hotels like The Spa Hotel and centres such as Knowles near Goudhurst however, the Borough does lack a signature spa facility such as the Thermae Spa in Bath. In-order to use this theme and incorporate the spa treatment already on offer, focusing the Tunbridge Wells offer around wellbeing would be a much stronger proposition. Additional product that contributes towards the wellbeing offer are meditation and yoga retreats, alternative therapies, life coaching ,herbalist workshops, education and activities.</p>	<p>The offer of treatments via day spa facilities is a strong component in a wider leisure experience – Great examples of spa experiences are either - destination spas offering a full range experience over 1-3 days or specialist facilities e.g. The Detox Retreat at Simple Healing in West Sussex.</p>
Outdoor pursuits	<p>There is an opportunity to link the spa/ relaxation product with the outdoor activity offer. Tunbridge Wells is the only place in the county where you can go curling and has both indoor as well as outdoor rock climbing. Mountain biking is covered at Bedgebury, Hemsted and Bewl Water which covers cycling, walking and water sports.</p>	<p>Activity break packages – great examples of how a localised activity offer can be packaged with a spa treatment/ hotel - www.intotheblue.co.uk this company already packages activities across the county from racing to bee-keeping.</p>
Special interest bespoke tours	<p>Tunbridge Wells Borough has a strong heritage offer, both National Trust and privately-owned properties. One of the fundamental challenges for independent visitors is how to access rural heritage without a car (public transport is unreliable to remote rural locations even in peak season). This does offer an opportunity for the development of special interest bespoke tours.</p> <p>Even the most popular of attractions can be hard to access e.g. Sissinghurst and Penshurst Place – however there is an opportunity to take chauffeur drive to a new experience-based level - offering a personal planner service.</p> <p>There are also pockets of special interest excellence within the borough, such as Piano lessons at Finchcocks – this is a relatively new offer and given the quality of the setting could offer an excellent example of a niche transformative experience.</p>	<p>A great example is www.realyorkshiretours.co.uk who offer a full range of experiences from walking trips, creative courses, guided tours... and even how to become a butcher!</p> <p>The Experimental Perfume club – day courses with a trained perfumer to create your own perfume www.experimentalperfumeclub.com</p>
Gardens & the Plant to plate revolution linked to wellness	<p>As a nation we are mad about gardening – at present the ‘plant to plate’ revolution is showing no signs of decreasing with over 90,000 Brits currently on the waiting list for an allotment. The new breed of British gardeners are here... The Late Bloomer segment (35-55) are keen to get their hands dirty but don’t know how. The Millennial gardener views gardening as an extension of personal wellbeing and the Eco Gardener wants to garden with the help of nature. Designing gardening experiences that meet the needs of these new wave gardeners could offer a huge opportunity for heritage attractions and larger national organisations like the NT to connect with new audiences. For the Millennial segment, lockdown has only increased their interest in gardening, as it is seen to have a direct correlation to personal wellness. (Gardens trends report 2019 – Gardenforum).</p>	<p>Great Dixter have been running gardening Master classes for 15 years and are now seen as one of the leading gardens for tuition. www.greatdixter.co.uk</p> <p>Other great course examples are Veg growing at Perch Hill with Sarah Raven. www.sarahraven.com</p> <p>Fruit and Veg growing courses at River Cottage</p>



Tunbridge Wells Product Priority – Opportunities & Gaps

Experience	Lead Opportunity underutilised at present	Product example
Interior Design	The area hosts several leading events throughout the year, such as the Decorative Living Fair at Eridge Park and has a plethora of interior shops in the town and surrounding villages – Tun Wells Interiors, Mink, Skinners, Susie Watson Design and Ensor Interiors based in Frant. Opportunities around interior design courses linking to local restaurants and cafes to offer a design lunch (e.g. Juliet’s) or the development of a pop up autumn and winter fair programme around the Pantiles?	One of the most successful examples of a retail outlet that had expanded to offer design courses and events is www.thecountrybrochante.co.uk in Midhurst. Events run all year round.

	Primary Themes	Gaps analysis for selected themes
Tunbridge Wells	Wellbeing	<p>Improving personal wellbeing is something we are all seeking, but often find hard to find. The default product offer is often a spa and wellness day/ short-break.</p> <p>Although Tunbridge Wells can offer this product, expanding to include learning in situ experiences offers greater potential.</p> <p>At present some of the gardens and heritage attractions offer niche gardening courses, these are often targeted at the seasoned gardener. No one really caters for the new gardeners, who are poised to be the next generation of garden lovers/ garden visitors?</p> <p>There is a huge gap in the market, which the independently owned houses could capitalise on to generate income and visitors to the local area out of main season.</p> <p>Accessing rural based activities can however be a challenge and often is to the overseas visitor. This is where transportation companies and small tour operators can offer the links and access to the county’s hidden treasures, taking the stress away from the customer by acting as a mobile concierge. At present issues over accessing this type of product from Oct – Mar will hinder product development.</p>



Wellbeing



Appendix 1: Engaging the visitor with the landscape

Experience products: E.g. Food & Drink – Hidden Heritage – Literary – Agricultural tours – Food & drink – Wellness

How do visitors engage with outdoor activities?

85% of visitors that want to engage with the countryside are casual walkers

Casual/ leisure walker/ cyclists

Casual / moderate walker / cyclist with limited time

Long distance walker/ hiker/cyclist

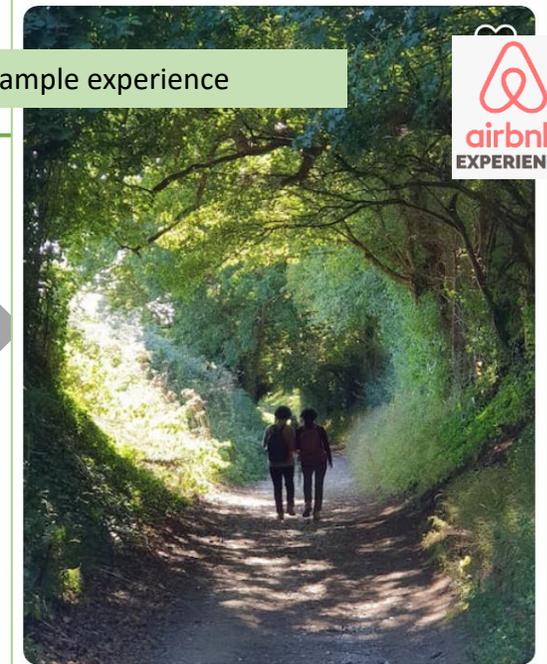
Lead product: North Downs Way/ AONB/ England coast path Walking / Cycling/ Nature

Local Day visitor Leisure walker/ group tour Families Outdoor activity is not the main reason for travel Local/ Domestic/ group international Cross segment appeal Product; 1-2 hours walking combined with other attractions - often circular routes to car park with other products Barriers: Concern about getting lost, accessing the countryside, weather

1-2 day options combined with other product Repeat visitor Walking/ cycling as 'part of' not main reason Domestic 1-2 hour journey time/ rural retreaters/ active Product: 1/2 day - 2 days - regular walkers, time poor -mid -higher range accommodation/ Unique Airbnb/ looking to combine other experiences Barriers: Time, need to relax, competition from other activities, weather

Solo traveller/ couples/groups Hikers / mountain biker/ route cyclist Trail collectors Domestic & International Product - self guided/ looking for planning and local knowledge assistance to assist own planning - camping, Airbnb ,B&B Barriers: appeal of other trails, baggage carrying service/ lack of

Example experience

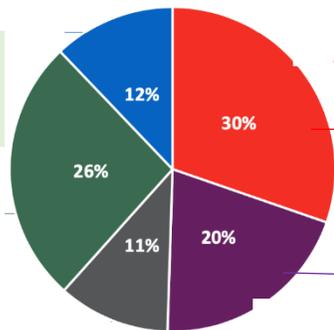


★ 4.93 (69) · Chichester District Halnaker tree tunnel and windmill walk Nature walk · 2.5 hours From £16/person

Who are the lead segments?

The countryside appeals across all VisitEngland segments, however there is greater resonance with segments 1&2.

- 1. COUNTRY-LOVING TRADITIONALISTS
- 2. FUN IN THE SUN
- 3. FUSS-FREE VALUE SEEKERS
- 4. FREE AND EASY MINI-BREAKERS
- 5. ASPIRATIONAL FAMILY FUN



1. COUNTRY-LOVING TRADITIONALISTS

Empty nesters with traditional values, they are likely to have recently taken a countryside break in England. Good quality, secure accommodation is a priority when booking a holiday.

2. FUN IN THE SUN

Typically parents looking for family-orientated summer holidays where beaches play a starring role. Tend to seek cheaper, more 'social' alternatives to hotel accommodation, such as caravans or holiday camps.

What makes a good walking experience?

- ✓ Landscape/ views/ architectural vistas
- ✓ historical or cultural insight often delivered as insider knowledge
- ✓ A chance to relax, unwind and recharge – linking to the well-being and mindfulness trend.

Appendix 2

Kent/Lead District Snapshot - Strength, Opportunity and Gap analysis

– Experience led product only

Please note: This is not a definitive list of the county's tourism product, each district factsheet will have a more in-depth product snapshot.

Strength (S) – The product is already established but could be more experiential/ season lengthened

Opportunity (O) – There is an opportunity to develop this product to raise the profile of the area through experience

Gap for development (G) – There is a consumer interest and potential for the destination to showcase this product

Seasonality Key for product delivery (Actual and Potential)

High	Potential for high product delivery in this quarter – This product may not be currently delivering in this month
Med	Potential for Medium level product delivery in this quarter due to - weather, product, availability of local support
Low	Low product delivery in this quarter due to – Reliance on weather, volunteer base, product availability

Product Grid	Kent (All)	Kent Downs AONB	White Cliffs Country NDW/AONB	Folkestone & Hythe District	Canterbury NDW/ AONB	Thanet	Ashford NDW/AONB	Tun Wells	Gravesham NDW/AONB	Medway	Seasonality			
											Jan - Mar	Apr - June	July - Sept	Oct - Dec
Golf	O		S/O	O			O							
Hidden Heritage	S	S/O	O	O/S	S/O	O	S	S	S/O	S/O				
Archaeology	O		O/G		O/G					O				
Gardens/ Gardening Courses	S/O	O		O			O	S	O					
Fossil Hunting	O		O	O/S	O	O								
Military heritage	O		S	S			O		S/O	S				

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											Jan - Mar	Apr - June	July - Sept	Oct - Dec
Wildlife	O	S	S/O	S/O	S/O	O	O	O	O	O				
Walking & Cycling	S/O	S	O/G	O/G	O/G	O	S/O	O/G	O/G	O/G				
Water sports	O	O	O	O	O	O								
Food & Drink	S	S/O	O	S/O	S	O	S/O	O	O/G	O				
Multicultural	O	G	O	O	O	O	O		S/O	O				
Foraging	O	S/O	O	O	O	O	O	O	O					
Pilgrimage	O	S/O	S/O		S/O		O		O	O				
Photography	O/G	S/O	O/G	O/G	O/G	O/G	O	O	O	O				
Agriculture		S/O	S/O	S/O	S/O	O	S	S	O					
Vineyards	S/O	O	O	O	O		S	O	O					
Theatre/ Music	O		O	S/O	S/O	S/O		S/O		O				
Creative courses	O	O	O	S/O/G	O	S/O/G	O	O	O	O				

Product Grid	Kent (All)	Kent Downs AONB	White Cliffs Country NDW/AONB	Folkestone & Hythe District	Canterbury NDW/ AONB	Thanet	Ashford NDW/AONB	Tun Wells	Gravesham NDW/AONB	Medway	Seasonality			
											Jan - Mar	Apr - June	July - Sept	Oct - Dec
Art tours	O			S/O/G		O				O				
Lux escapes	O			S/O	O		O	O						
Wellbeing	O	S/O	O	O	O	O	O	S/O	O	O				
Maritime	S/O		O	O	O				S	S				
Seafood	O		O	S/O	O	O								
Outdoor pursuits			O	O/S	O	S/O								
Events	S/O		O	S/O	S/O	S/O/G	O	O	O	S/O				
Markets	O				O		O	O	O	O				
Retro culture	O		O	O	O	S				O				
Pop Culture	O			O		O			O	O				
Screen tours	O		O	O	O/G	O/G	O			S/O				
Fishing	O		O	O	O	O								
Cooking	O	O	O	S/O	O	O	S/O	O	O	O				
Family/ small group focus			O	O	S/O	S	O	O	O	O				
Bespoke tours	S	O	O	O	O	O	O	O	O	O				

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