

**Town Centre Health Indicators
2006
Tunbridge Wells
January 2007 Version**

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TUNBRIDGE WELLS TOWN CENTRE

A Profile of Town Centre Health Indicators

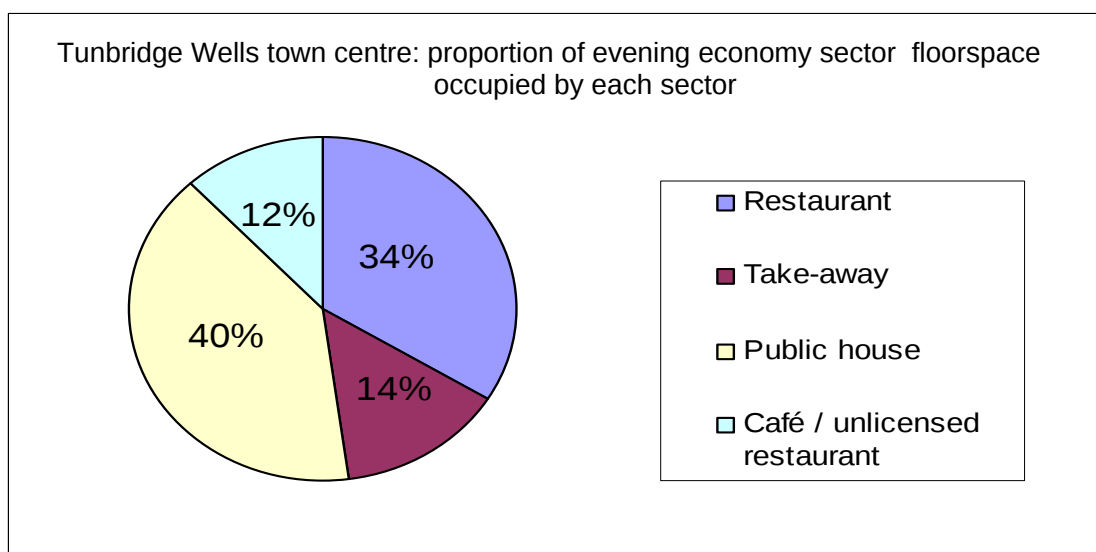
This report has been prepared by Kent County Council on behalf of Kent Town Centre Managers. It is one of a series that includes all major Kent towns and draws on published data as well as data collected by Kent County Council.

Currently eleven key indicators are used to assess the health of Tunbridge Wells town centre. These include evening-economy sector floorspace, retail sector floorspace, vacant retail property, footfall, retail yield, retail rent, retail sector employment, crime, mode of transport, air quality and cleaner streets. Tunbridge Wells town centre was surveyed 2005 and is part of a rolling programme to survey towns every five years. The extent of the town centre is shown in Map 1, together with all properties surveyed in the Kent County Council Town centre audit. All maps referred to in this report can be found at the end. This profile concentrates on data for Tunbridge Wells town centre. To put Tunbridge Wells' performance into context a summary of data for all towns in Kent has been included in Appendix 1.

Evening economy

The distribution of evening economy sector facilities, especially pubs, restaurants and take-away outlets can significantly influence the character of the town centre after dark. At the time of the town centre audit, these facilities were generally evenly distributed around Tunbridge Wells town centre and occupied a total of 27,194m² of town centre floorspace, which represents approximately 19% of total floorspace. Refer to Map 3 and Chart 1 & Chart 2.

Chart 1

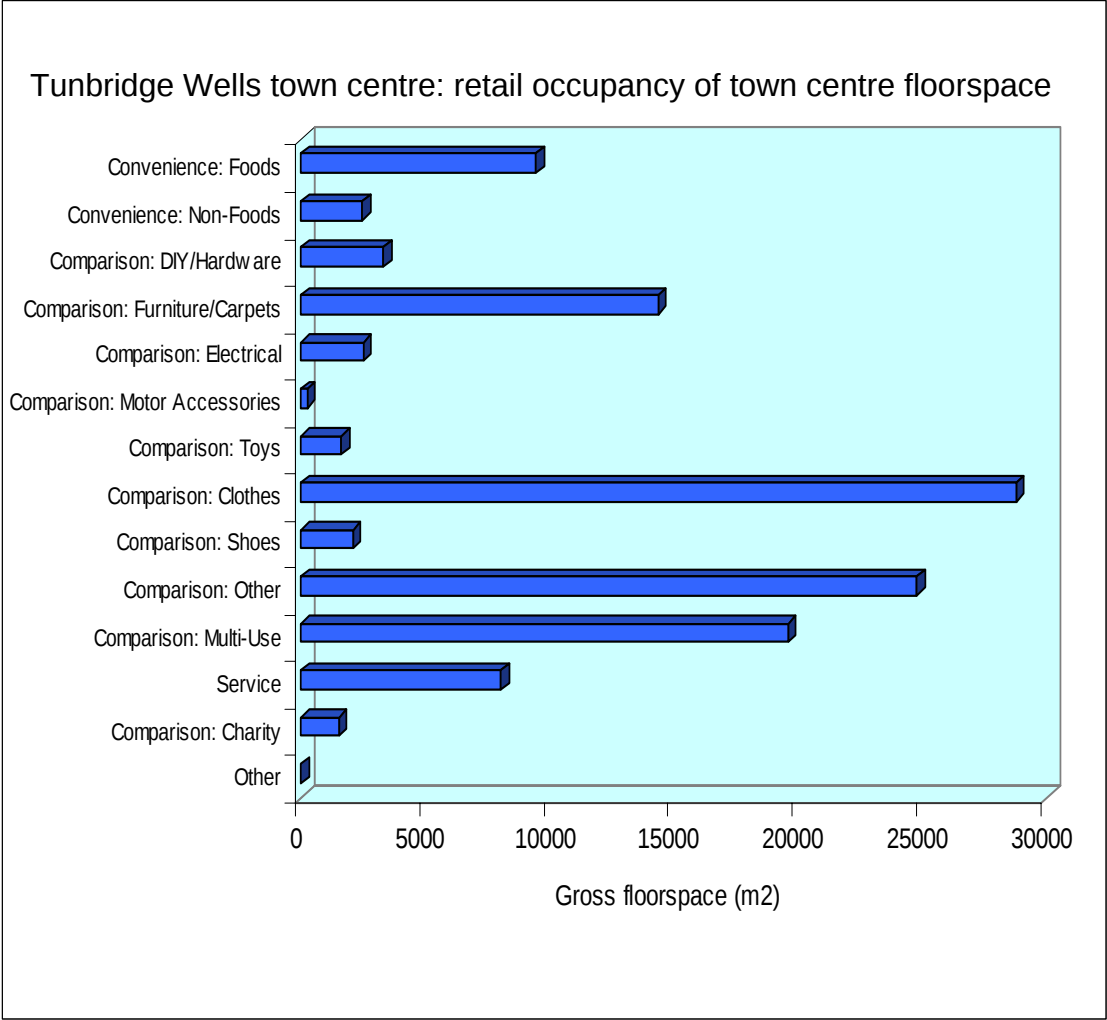


Source: Kent County Council Town centre audit

Retail floorspace

Tunbridge Wells town centre has a total of 117,078 m² of retail and service sector floorspace. The floorspace occupied by each retail sector at the time of the town centre audit, is illustrated in Map 2. The information given on the map is shown graphically in Chart 2.

Chart 2

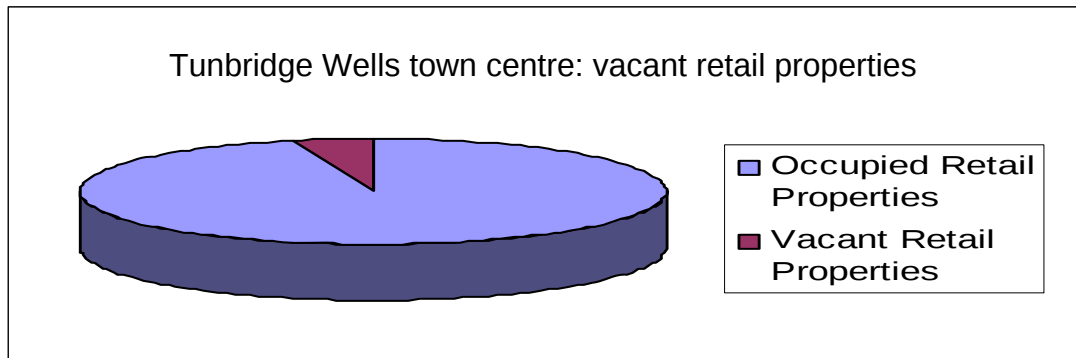


Source: Kent County Council Town centre audit

Retail vacancies

Tunbridge Wells town centre has a total of 531 retail properties. Of these 24 were vacant at the time of the survey giving a vacancy rate of 5%. These properties are shown in Map 2 and Chart 3.

Chart 3



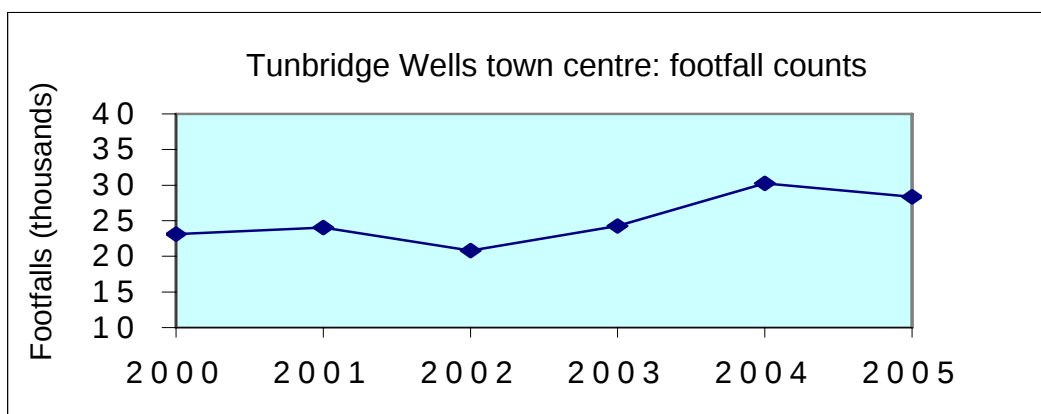
Source: Kent County Council, Town centre

Footfall

Footfall figures give an indication of the numbers and distribution of people visiting Tunbridge Wells town centre. A footfall survey was commissioned for Tunbridge Wells town centre from Pedestrian Market Research Services. This was carried out on the 17th and 18th of June 2005 located at 30 sites around the town, (there was no survey commissioned for 2006). The results were calculated to give the number of pedestrians passing each location over the period of a full week and are shown by Map 4.

Some footfall data from previous surveys is also available and is shown in Chart 4. The data shows a gradual increase in the number of people visiting Tunbridge Wells town from 2003.

Chart 4



Retail yield

Retail yield is another indicator of the health of the town centre. The most **favourable** conditions for retailers are indicated by the **lowest** yields. Retail yields in Tunbridge Wells are significantly lower than the mean yield in Kent. Explanation of retail yield can be found in the glossary.

Chart 5

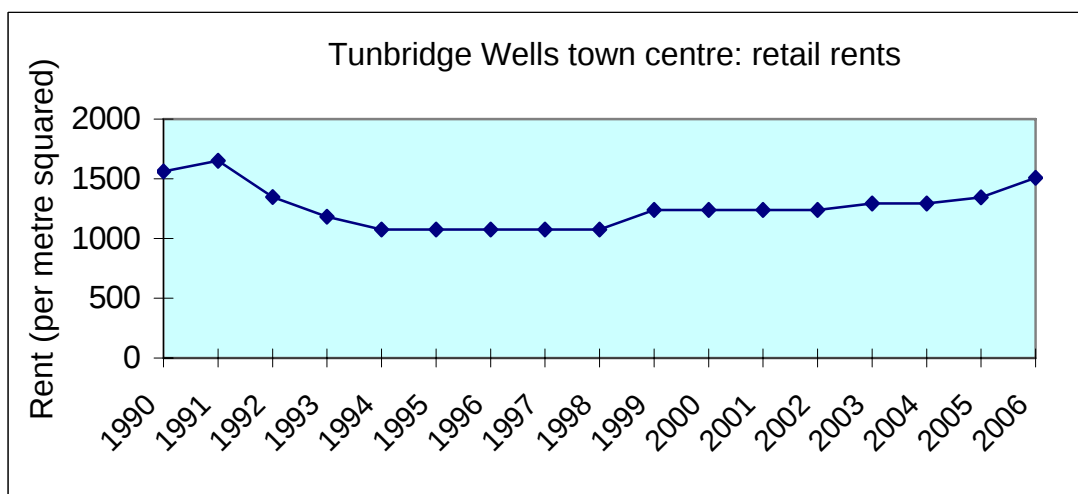


Source: The Valuation Office, Property Market Report

Retail rents

Retail rents also reflect the health of a town centre. Retail rents in Tunbridge Wells town centre have declined over the period from 1990 to 2000 from a high of £1651/m² to £1076/m² per month and have remained relatively stable since 1994.

Chart 6

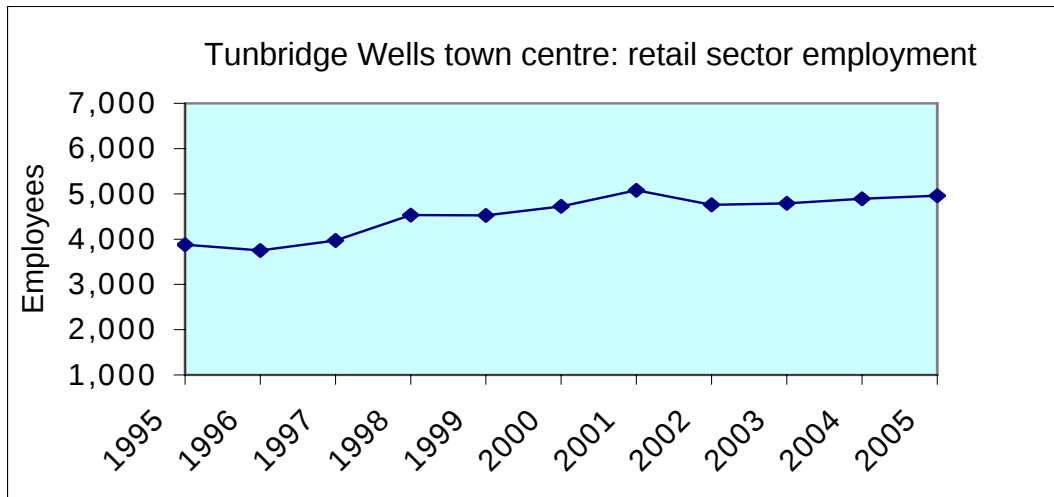


Source: Colliers Conrad Ritblat Erdman Ltd, In-Town Retail Rents

Employment

The retail sector provides a significant opportunity for employment within Tunbridge Wells as within most town centres. On average 4000 people have been employed within the retail sector throughout most of the 1990s and numbers are continuing to increase. To compare employment figures in other towns refer to Appendix 1. The employment figures given in Chart 7 are for wards approximating the town centre area.

Chart 7

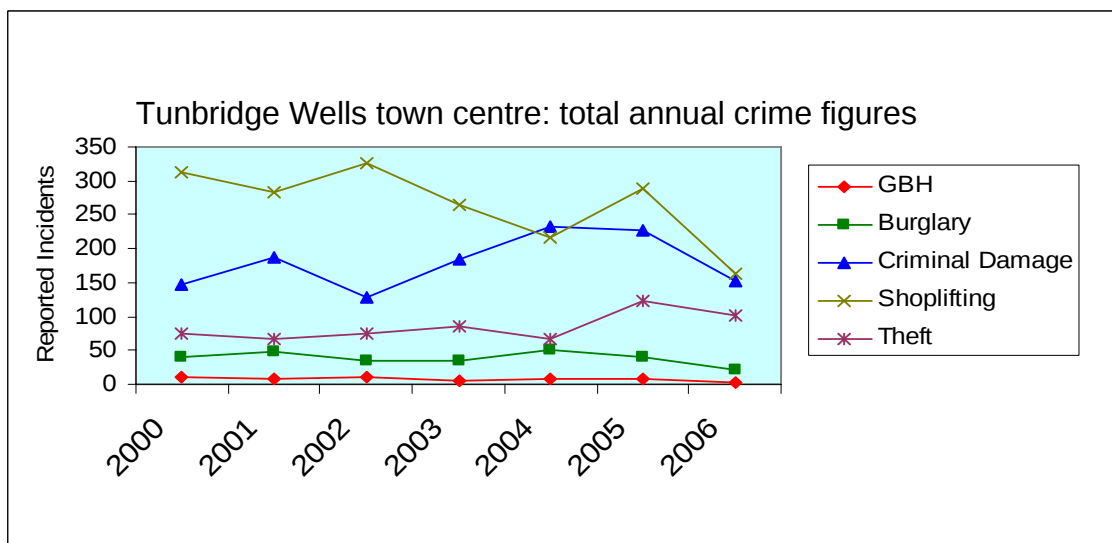


Source: The Office of National Statistics, The annual employment survey

Crime

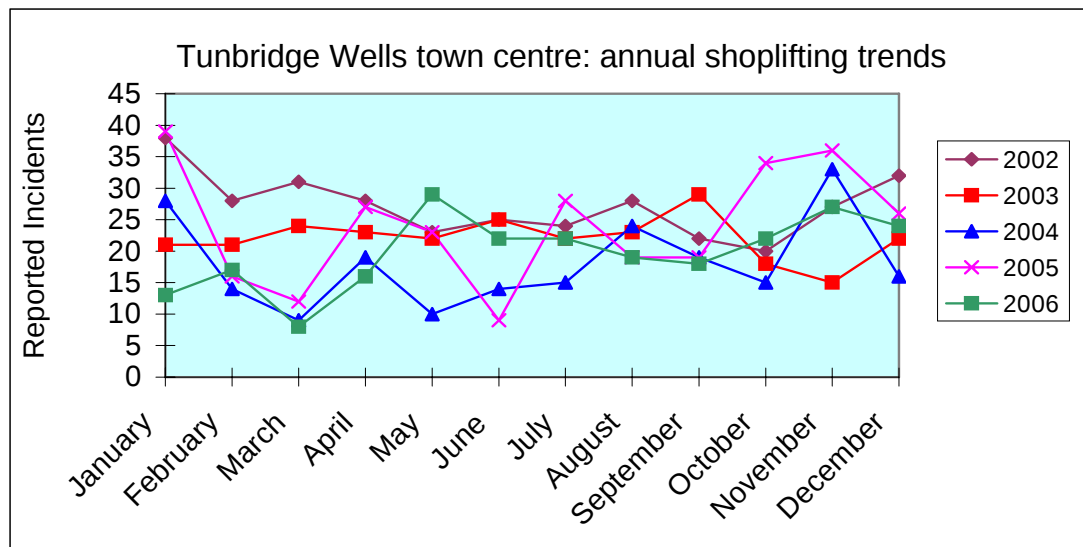
The recorded crime statistics for a town centre also give an indication of the general health of the town centre and the community it serves. Some general crime statistics are shown in Chart 8, together with the yearly trend in reported shoplifting incidents in Chart 9.

Chart 8



Source: Kent County Constabulary, Business Development Unit

Chart 9

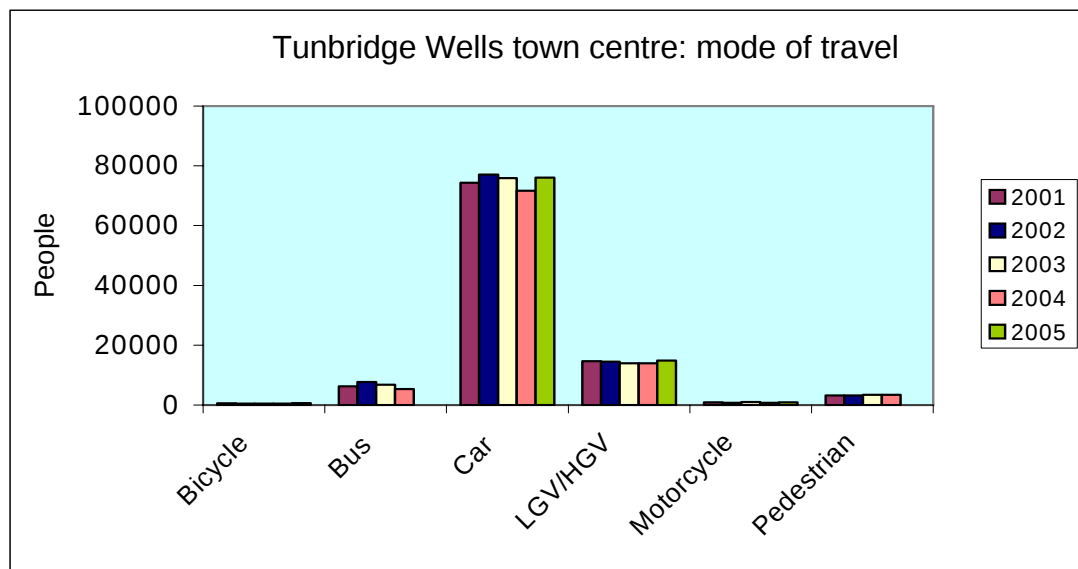


Source: Kent County Constabulary, Business Development Unit

Transport

People access the town centre using a range of transport modes. These give an indication of the accessibility of the town centre. Chart 10 shows the percentage of people using different transport modes to access the town centre.

Chart 10



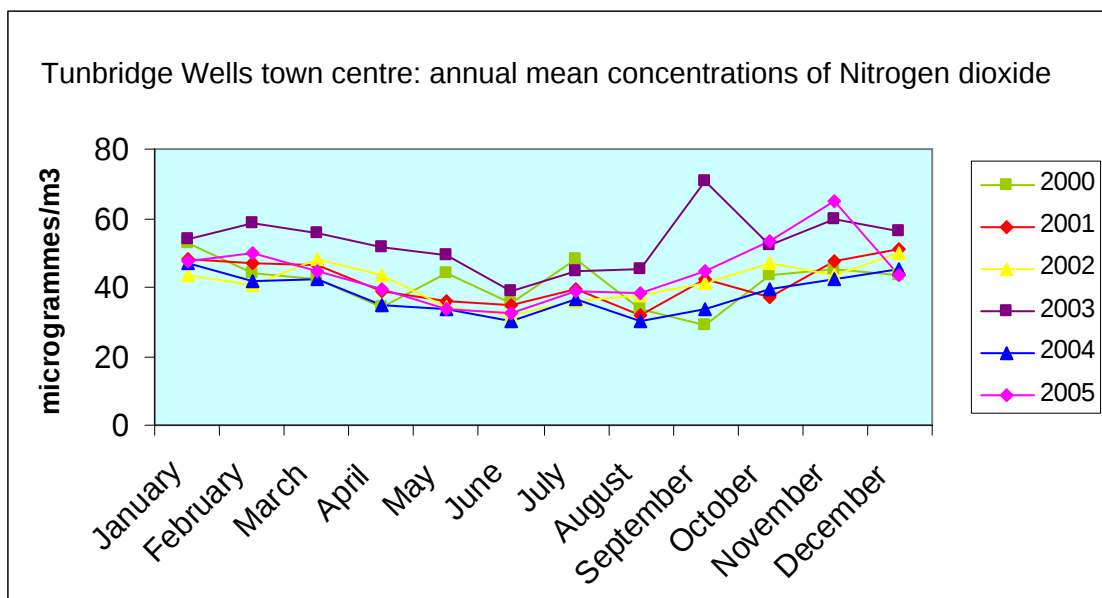
Source: Kent County Council, Travel Report, 2005

Air Quality

Air quality is of growing concern in Britain's town centres. Of particular concern in Kent is the concentration of Nitrogen. Around 48% of the nitrogen dioxide produced in Britain is a result of road traffic. At very high levels nitrogen dioxide gas causes irritation to the lungs and can worsen the symptoms of respiratory disease. Nitrogen dioxide levels are monitored at a number of points around the county. This year levels of nitrogen dioxide were recorded in microgrammes to comply with national air quality standards. In order to preserve consistency previous years have also been converted to microgrammes. Chart 11 gives an indication how these concentrations vary at different times of the year.

More air quality information is available for a range of air pollutants from the Kent Air Quality Partnership web site, www.kentair.org.uk.

Chart 11



Source: www.kentair.org.uk, 2005

GLOSSARY

Burglary	This category includes all categories of burglary e.g. burglary and aggravated burglary.
Comparison - bulky	This includes, DIY/Hardware, furniture and carpets and electrical goods.
Comparison -non bulky goods	This includes toys, clothes, shoes, other (specialist retailers) and multi-use (variety and department stores & catalogue shops)
Convenience goods	This category includes products that form part of every-day life and includes food, newspapers, confectionery, tobacco, alcohol and other beverages excluding alcoholic drinks at public houses, hotels and restaurants for consumption on the premises.
Footfall	The footfall figures quoted represent estimates of the total number of pedestrians passing each site over a six hour period. These are calculated by grossing up the actual figures counted by 30 to allow for the fact that pedestrian movements were actually sampled for 12 minutes out of the six hour shopping period. The survey was carried out on a Friday and Saturday. The results from these were grossed up by a further factor of 2.353 to allow for Monday to Thursday shoppers who were not counted. This factor is based on a series of previous surveys carried out throughout the whole seven day week.
Service Sector	This category includes cleaning, rental, hairdressing and funeral directors.
Theft	This category includes theft from a person or motor vehicle and the theft of a pedal cycle.
Traffic Count	More information about the Kent County Council traffic Count programme is available from 'Kent Travel Report' 2005.

Yield

Yield is a measure of property value that enables properties of different size, location and other characteristics to be compared. It is the ratio of rental income to capital value, and is expressed in terms of the open market rent of a property as a percentage of the capital value. Thus, the higher the yield the lower the rent is valued, and vice versa. A high yield is an indication of concern by investors that rental income might grow less rapidly and be less secure than for a property with a low yield.

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CLEANER STREET SURVEY 2005

District	Town Centre	Date	Time	Location	Litter	Detritus	Graffiti	Flyposting
Dover	Dover	02/08/2005	14.35pm	Iceland	B/C	A	A	A
Dover	Dover	04/08/2005	12.40pm	Market Square	B+	C	B+	B+
Dover	Dover	04/08/2005	10.50am	Biggin Street (Marks & Spencer)	B+	C	B+	B+
Sevenoaks	Sevenoaks	22/07/2005	2.30pm	120 High Street (Boots)	B+	B+	A	A
Sevenoaks	Swanley	22/07/2005	10.30am	Asda	B	B	A	A
Sevenoaks	Edenbridge	27/07/2005	10.45am	High Street (Natwest)	B+	B+	A	A
Shepway	Folkestone	11/08/2005	13.00am	41 The Old High Street	B/C	BC	B	B
Shepway	Folkestone	19/08/2005	11.30am	Sandgate Road (Marks & Spencer)	B+	B+	B+	B+
Shepway	Cheriton	26/08/2005	11.00am	High Street	B+	BC	B	B
Shepway	Hythe	01/09/2005	1.05pm	High Street (Woolworths)	B	B	A	A
Shepway	New Romney	08/09/2005	3.00pm	60-62 High Street (Natwest)	B	A	A	A
Shepway	Lydd	08/09/2005	1.00pm	34 High Street (Spar)	B+	A	A	A
Thanet	Cliftonville	08/07/2005	1.00pm	141 Northdown Road (J C Rook)	B	B+	A	A
Thanet	Margate	01/07/2005	10.30am	High Street	B	B	B	C-
Tonbridge & Malling	Tonbridge	22/04/2005	10.42am	Castle Street	B+	A	B	A
Tonbridge & Malling	Borough Green	14/07/2005	9.45am	Western Road	B+	B+	B+	B+
Tonbridge & Malling	Borough Green	14/07/2005	10.15am	High Street	A	A	A	A
Tonbridge & Malling	Snodland	14/07/2005	11.15am	Holborough Road	B	C	A	A
Tonbridge & Malling	Snodland	14/07/2005	11.00am	High Street	B	A	A	A
Tonbridge & Malling	West Malling	15/07/2005	11.56am	High Street	B+	A	A	A
Tonbridge & Malling	West Malling	15/07/2005	10.30am	Swan Street	B+	A	A	A
Tunbridge Wells	Hawkhurst	29/06/2005	14.30pm	High Street (The Colonade, Baldock & Son)	B+	A	A	A
Tunbridge Wells	Cranbrook	29/06/2005	12.00pm	Carriers Road	B+	A	A	A
Tunbridge Wells	Cranbrook	29/06/2005	10.30am	High Street (The White Horse)	B+	A	A	A
Tunbridge Wells	Tunbridge Wells	08/06/2005	3.35pm	27-35 Mount Pleasant Road	B+	A	B+	B+
Tunbridge Wells	Tunbridge Wells	12/05/2005	13.20pm	Calverley Road (Victoria Centre)	B	A	A	A

Criteria range: **A** being excellent, no litter to **D** having a lot of litter

- Town centre properties
- Extent of town centre

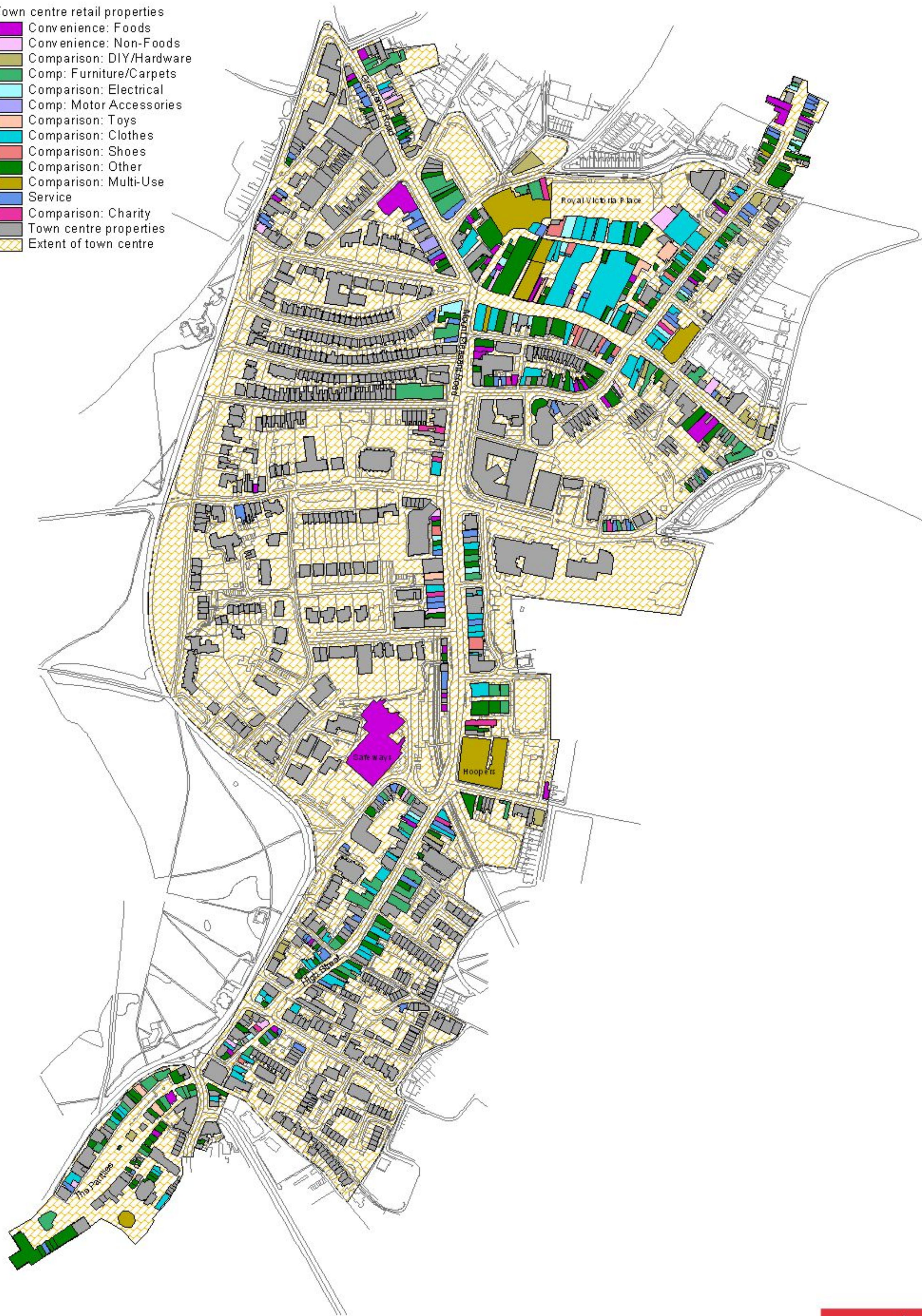


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- Town centre retail properties
- Convenience: Foods
 - Convenience: Non-Foods
 - Comparison: DIY/Hardware
 - Comp: Furniture/Carpets
 - Comparison: Electrical
 - Comp: Motor Accessories
 - Comparison: Toys
 - Comparison: Clothes
 - Comparison: Shoes
 - Comparison: Other
 - Comparison: Multi-Use
 - Service
 - Comparison: Charity
 - Town centre properties
 - Extent of town centre

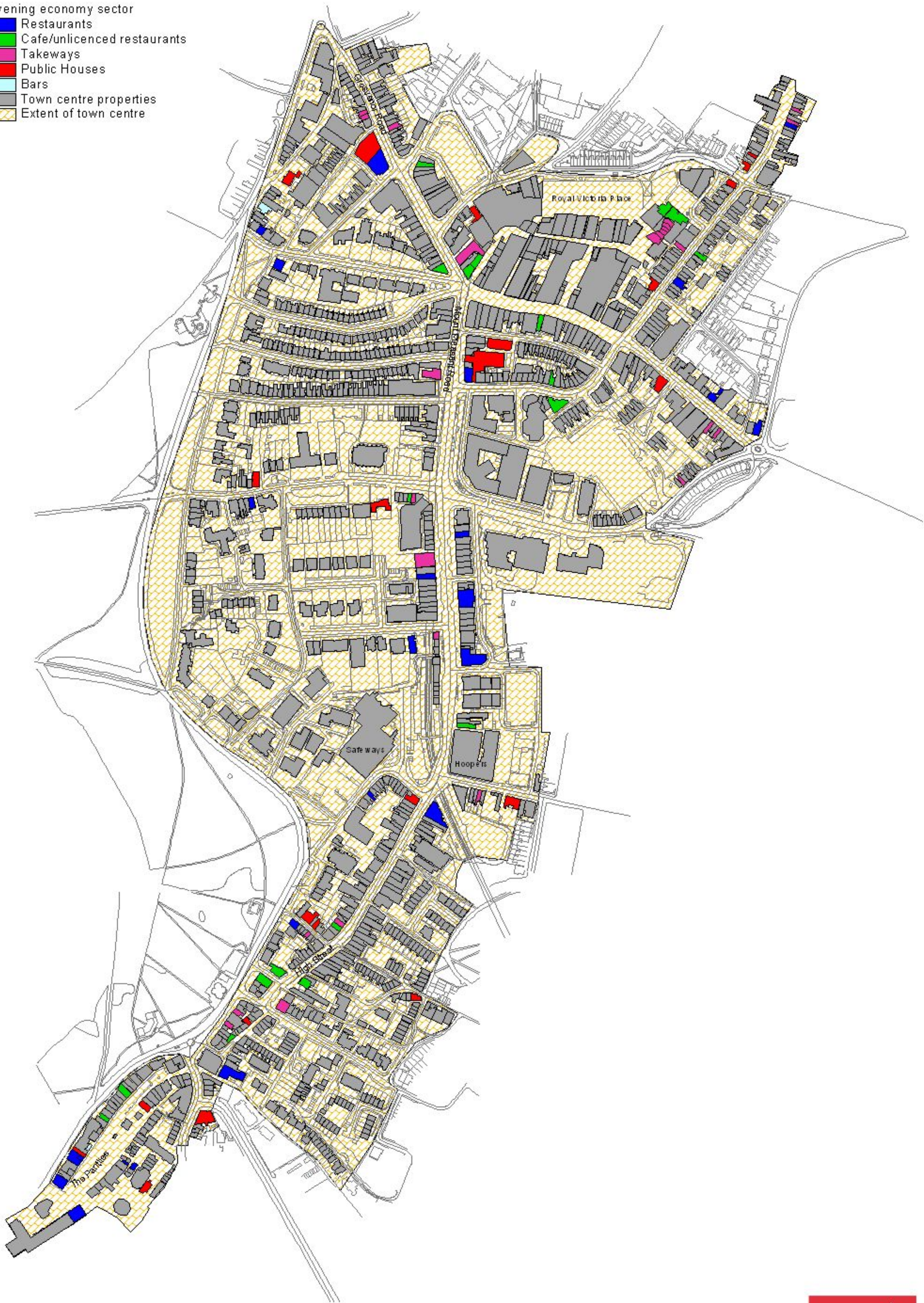


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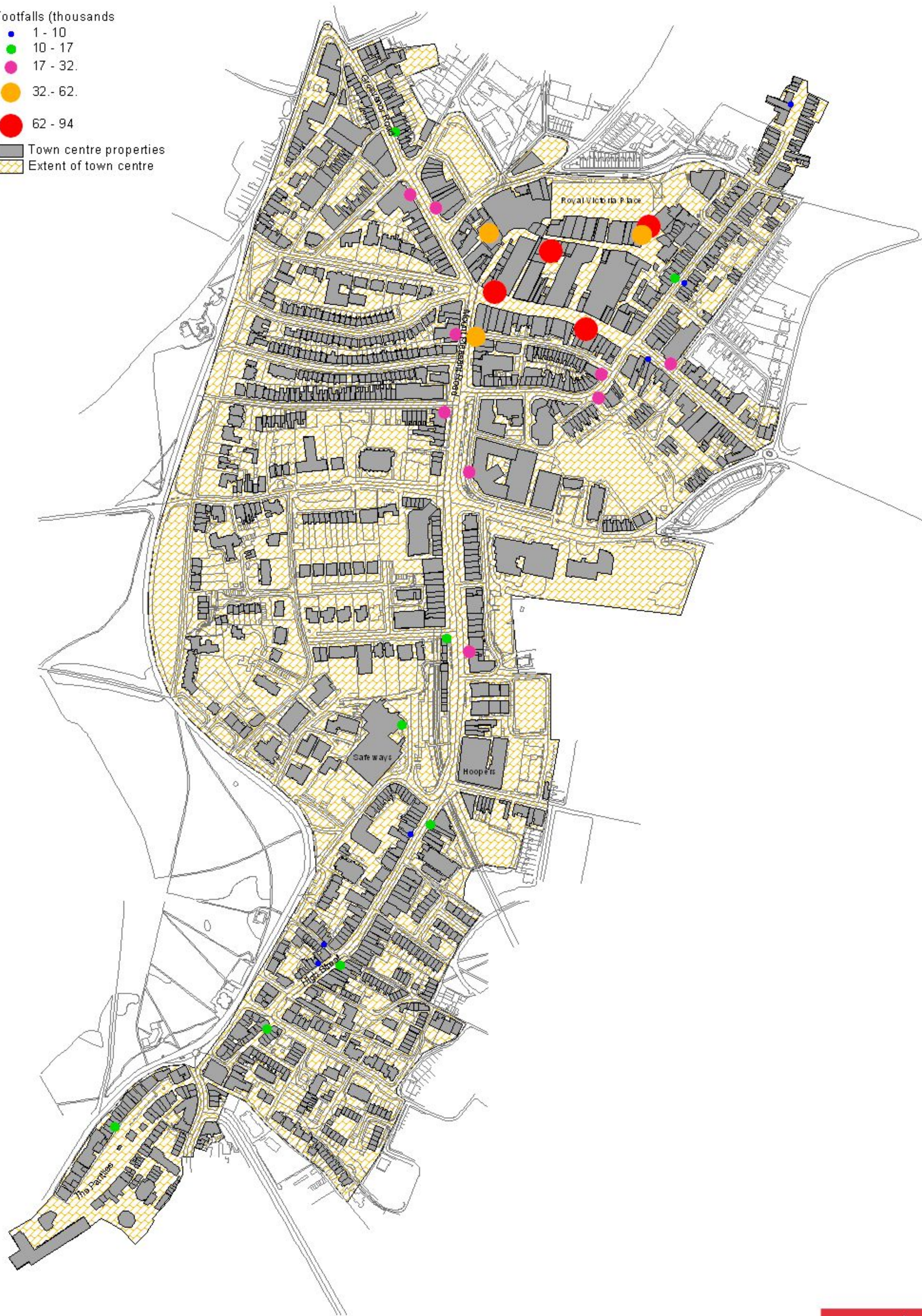
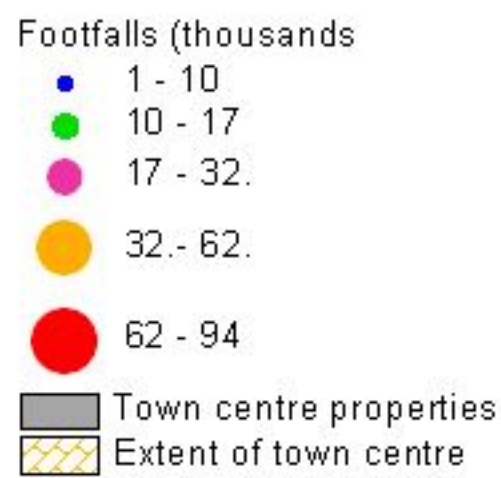
- Evening economy sector
- Restaurants
 - Cafe/unlicensed restaurants
 - Takeaways
 - Public Houses
 - Bars
 - Town centre properties
 - Extent of town centre

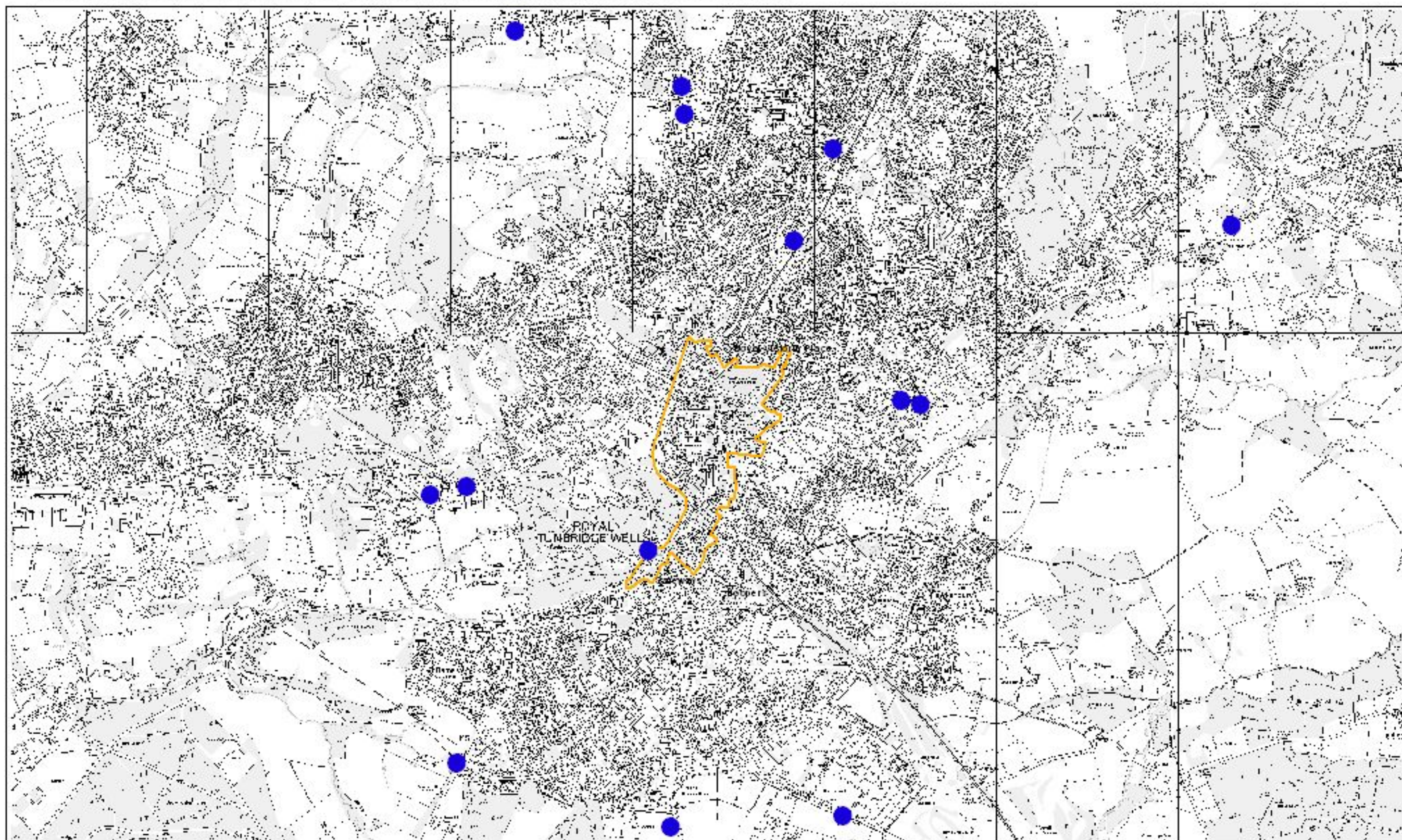


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- Traffic count sites
- Extent of town centre

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Appendix 1

Town centre health indicators for Kent - 2006

		Ashford	Canterbury	Dartford	Dover	Faversham	Folkestone	Gravesend	Herne Bay	Maidstone	Margate	Ramsgate	Sevenoaks	Sheerness	Sittingbourne	Tonbridge	Tunbridge Wells	Whitstable
Retail Floorspace (m ²)	Convenience: Foods	2,518	8,320	13,957	4,895	4,852	7,523	21,676	4,474	10,898	3,208	5,941	4,602	3,171	10,216	12,001	9,562	2,601
	Convenience: Non-Foods	1,091	2,630	1,293	2,286	569	754	1,186	438	3,715	1,182	2,046	1116	469	1,565	1,097	2,461	625
	Comparison - Non bulky	30,361	112,260	44,111	29,524	13,152	35,513	42,218	11,074	110,888	16,679	29,570	15,974	15,257	19,400	18,932	76,799	9,400
	Comparison - Bulky	7,768	8,938	26,446	8,964	2,817	4,930	23,687	7,599	19,859	1,794	7,866	5,237	3,351	8,555	2,421	20,209	1,583
Evening economy Floorspace (m ²)		7937	23145	15656	12691	6218	20762	23978	12233	37166	9871	18260	6908	5987	5259	14871	27194	3402
Vacancies (% of retail properties)		12	7	16	12	10	20	14	15	9	33	26	4	12	13	10	5	11
Footfall 2006 (thousands)		29.17	67.24	25.99	22.7	21.17	21.63	31.59	10.75	57.25	14.56	22.79	12.27	11.6	16.65	17.89	28.38	10.41
Retail Yield 2006		6.0	4.25	7.75	7.0	7.13	6.6	7.75	Unavailable	5.75	7.0	7.0	6.0	8.63	7.25	6.0	5.5	Unavailable
Retail Rents (£/M ²) 2006		807	2422	484	592	Unavailable	753	538	Unavailable	1507	538	Unavailable	753	Unavailable	538	646	1507	Unavailable
Employment 2005 (retail)		1,478	4,038	1,830	1,267	741	1,653	2,943	529	4,423	991	1,119	1,240	1,061	1,817	1,870	4,959	500
Crime 12mths (reported incidents)	GBH	14	8	21	10	1	17	10	6	10	15	12	3	8	3	16	3	0
2006	Burglary	70	40	61	46	27	63	52	32	70	70	91	31	64	36	106	21	26
	Criminal Damage	313	208	262	182	123	186	263	158	262	414	426	99	435	164	558	152	167
	Shoplifting	167	370	334	225	42	29	314	52	528	220	84	72	126	147	156	164	31
	Theft	125	110	131	51	52	93	122	73	137	125	167	51	104	84	208	102	55
Mode of Travel	Car	75.37	65.66	83.3	67.57	Unavailable	69.06	84.09	Unavailable	83.12	Unavailable	Unavailable	85.01	Unavailable	80.44	82.35	82.27	Unavailable
2005 (%)	Bus	6.44	10.74	Unavailable	3.86	Unavailable	12.18	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable
	Motorcycle	0.52	0.62	1.32	1.31	Unavailable	0.93	0.93	Unavailable	0.81	Unavailable	Unavailable	0.53	Unavailable	0.58	1.15	1.03	Unavailable
	Pedestrian	3.82	10.74	Unavailable	3.43	Unavailable	6.97	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable
	Cycle	0.60	1.05	0.71	0.41	Unavailable	0.54	0.86	Unavailable	0.24	Unavailable	Unavailable	0.21	Unavailable	0.67	1.41	0.68	Unavailable
	HGV/LGV	13.25	11.18	14.66	23.43	Unavailable	10.32	14.12	Unavailable	15.84	Unavailable	Unavailable	14.25	Unavailable	18.3	15.09	16.02	Unavailable

Sources: The Town Centre Audits carried out by Kent County Council, 2006 Pedestrian Flowcounts carried out by Pedestrian Market Research Services on behalf of Kent County Council, May and June 2006. The Property Market Report carried out by the Valuation Office, Autumn 2006. In Town Retail rents carried out by Colliers Conrad Ritblat Erdman Ltd. The Annual Employment Survey carried out by The Office of National Statistics, 2005. Town Centre Recorded Crime, Kent County Constabulary, Business Information Unit Kent County Council 'Kent Travel Report', 2005