

Town Centre Health Indicators 2007 Tunbridge Wells

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TUNBRIDGE WELLS TOWN CENTRE

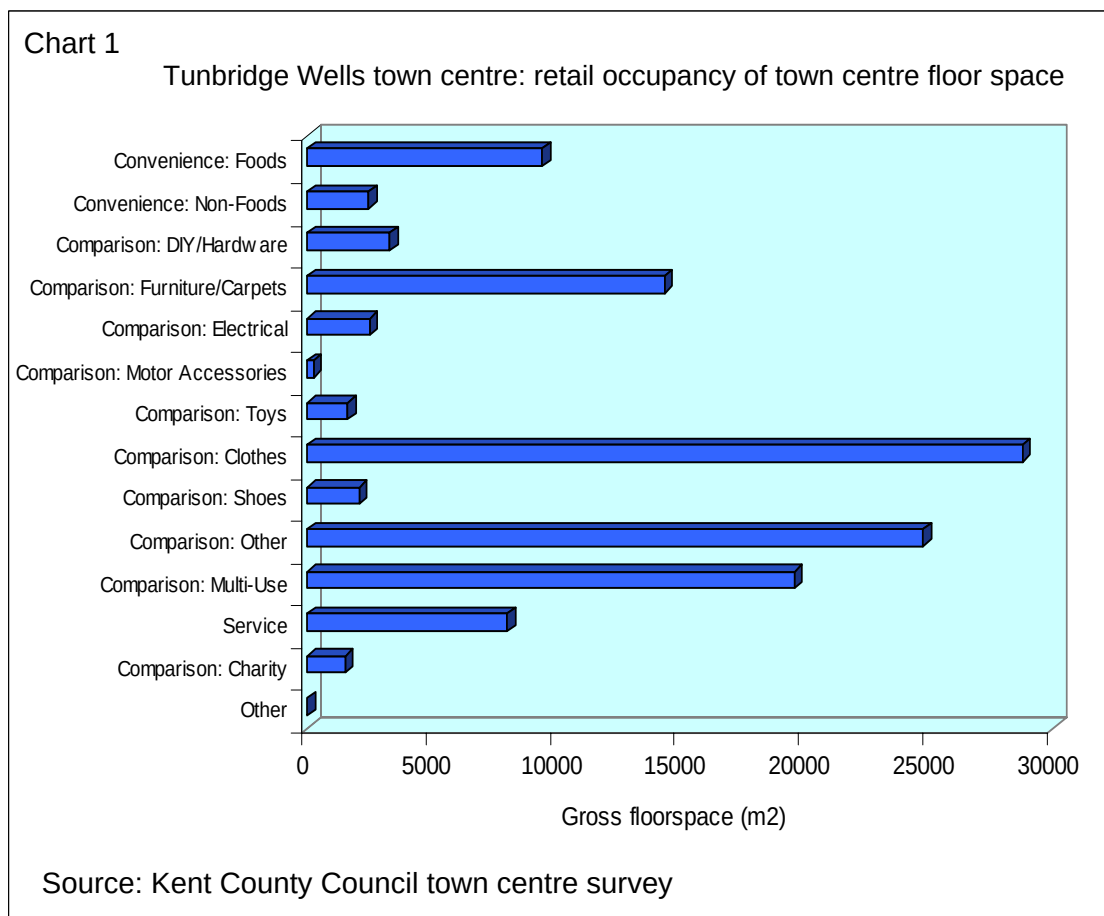
A Profile of Town Centre Health Indicators

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.

The health of a town can be assessed in many ways. This report considers the key indicators most commonly used to monitor town centres and includes, retail sector floor space, evening economy sector floor space, vacant retail property, retail yield, retail rent, retail sector employment, crime, mode of transport and air quality. Tunbridge Wells town centre was surveyed 2005 and is part of a rolling programme to survey towns every five years. The data collected from the survey is shown in a number of maps which can be found at the end of the report. A summary of data for all Kent towns is included in Appendix 1.

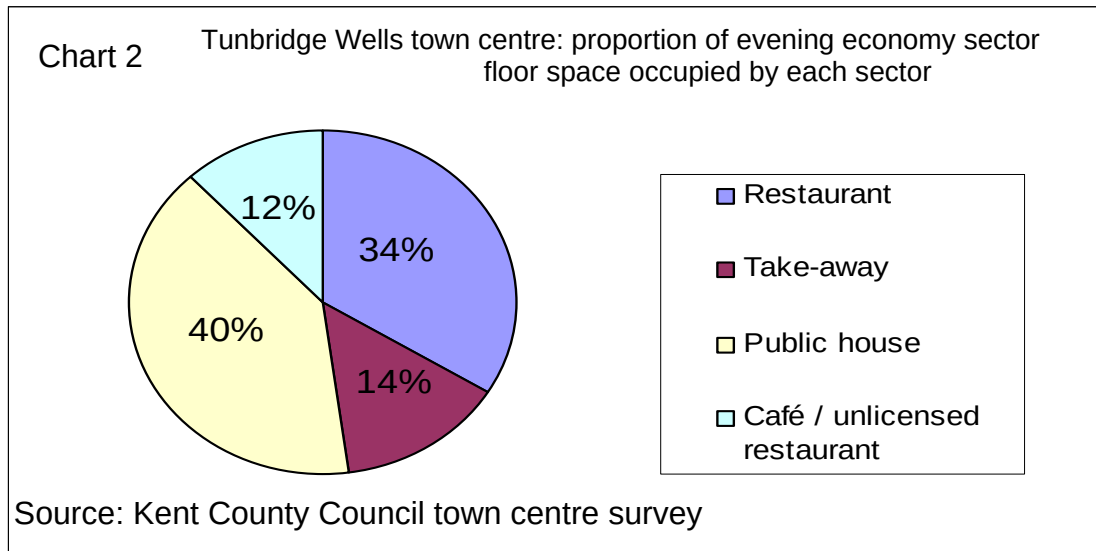
Retail floor space

Tunbridge Wells town centre has a total of 117,078 m² of retail and service sector floor space as surveyed in 2005. The town has a number of multiples which indicate that large retailers see the town as a good investment. The floor space occupied by each retail sector at the time of the survey, is illustrated in Map 2. The breakdown of total floor space by use is given in Chart 1.



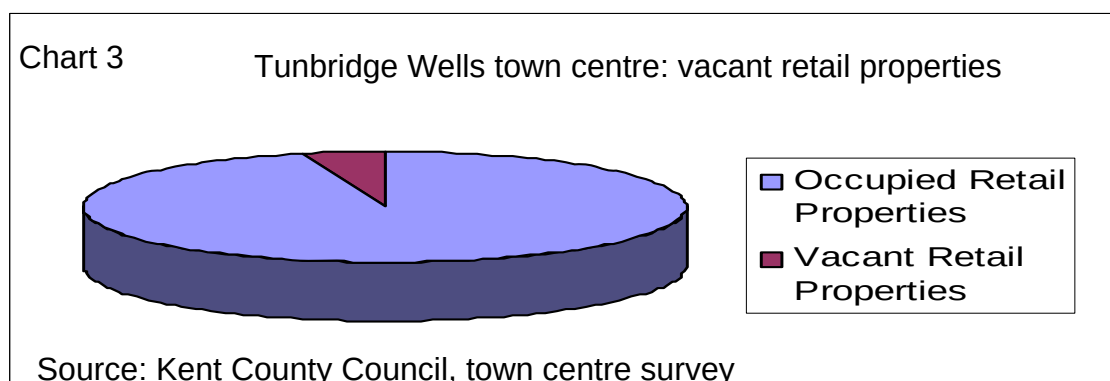
Evening economy

In the evening a town centre can take on a different character. Businesses such as restaurants, take-away outlets and public houses can have a considerable impact on the evening economy. At the time of the survey these facilities were generally evenly distributed around Tunbridge Wells town centre and occupied a total of 27,194m² of town centre floor space, which represents approximately 19% of total floor space. See Map 3 and Chart 2.



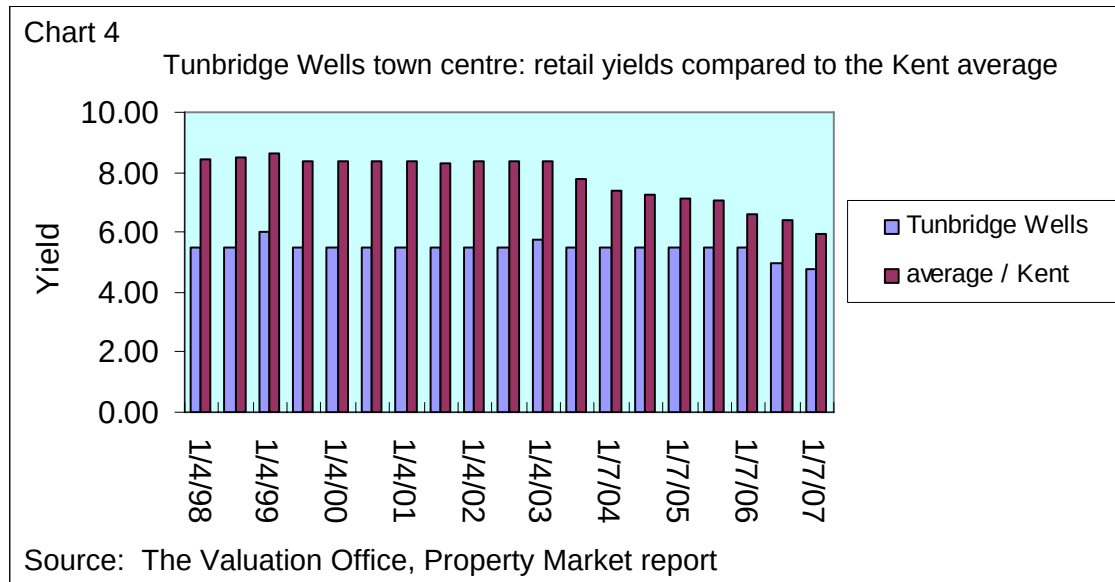
Retail vacancies

There are a total of 531 retail properties in Tunbridge Wells town centre. 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.



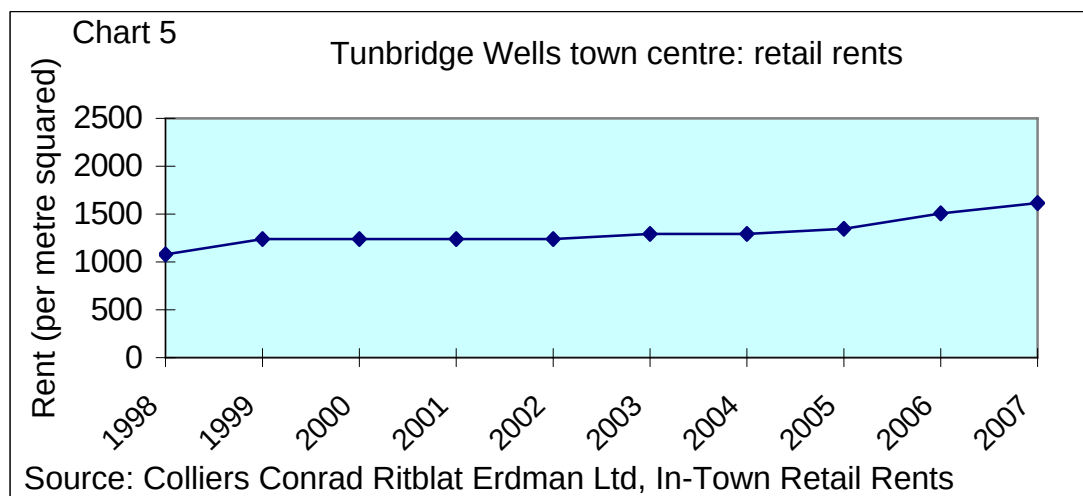
Retail yield

Retail yield can also be used to indicate the health of the town centre over time. The most **favourable** conditions for retailers are indicated by the **lowest** yields. (see Chart 4). Retail yields in Tunbridge Wells are significantly lower than the mean yield in Kent. Further explanation of retail yield can be found in the glossary.



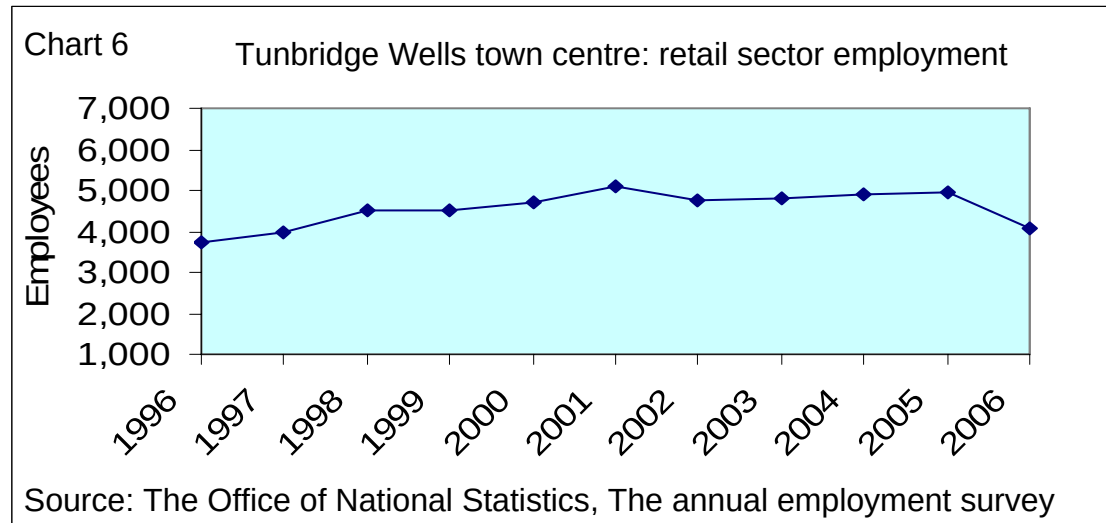
Retail rents

Retail rents also reflect the health of a town centre with high rents indicating a healthy local economy. Chart 5 indicates that retail rents in Tunbridge Wells town centre have remained relatively stable since 1998 at about £1100/m² per month. This figure has increased over the last few years.



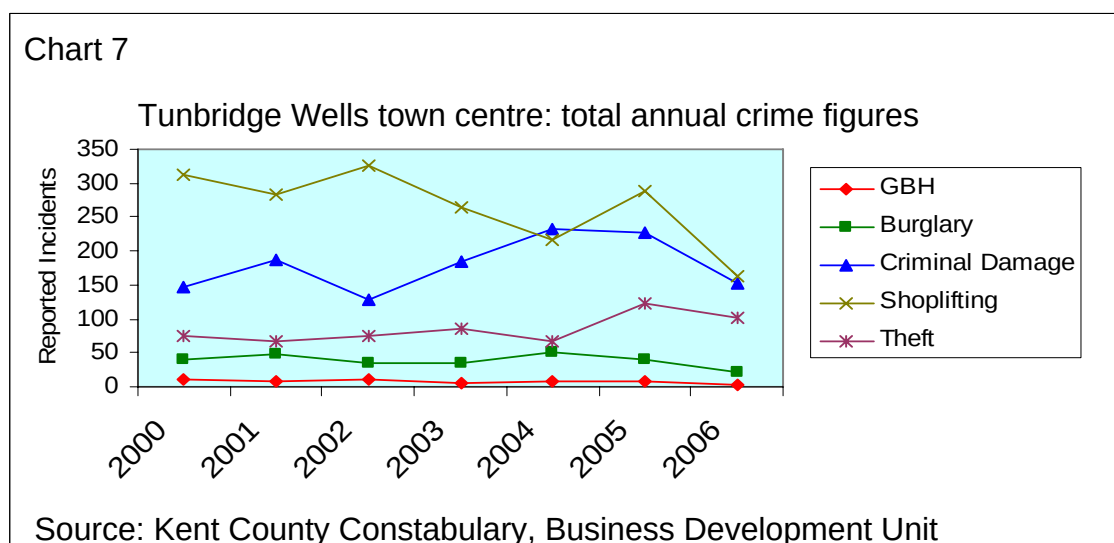
Employment

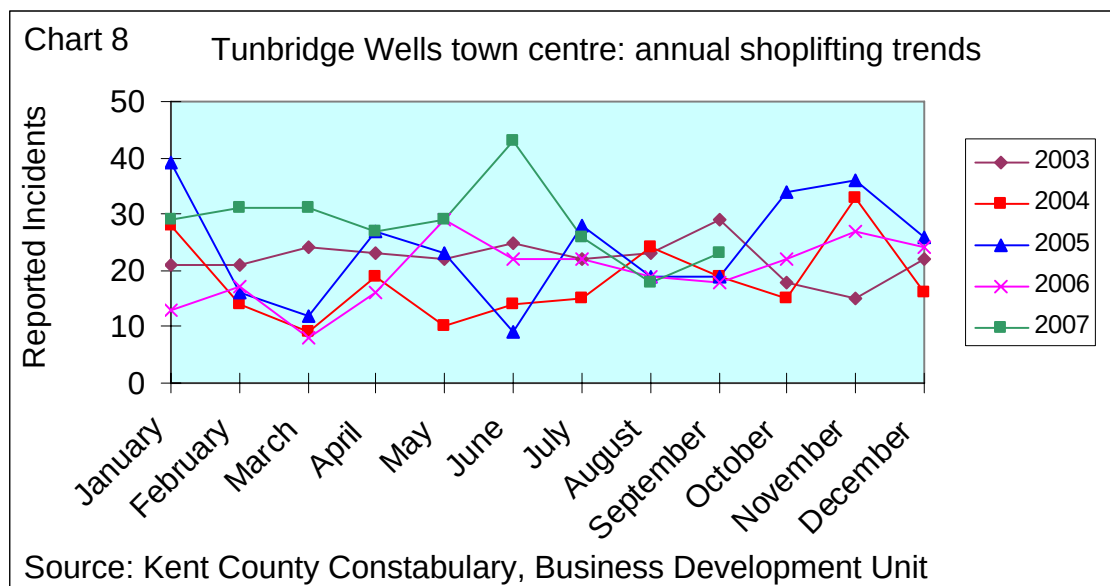
The retail sector in Tunbridge Wells is a significant employer. On average 4000 people have been employed within the retail sector throughout most of the 1990s and numbers are continuing to increase. However, the figures for 2006 show a slight decline. To compare employment figures in other towns refer to Appendix 1. The employment figures given in Chart 6 are for wards approximating the town centre area. The total employment figures within the town centre for 2006 was 19,051. Of these, approximately 21% were in retail employment.



Crime

The recorded crime statistics for a town centre give an indication of the general health of the town centre and the community it serves. Some general crime statistics are shown in Chart 7, together with the yearly trend in reported shoplifting incidents in Chart 8. Figures indicate that incidents of criminal damage and burglary are decreasing. The data for 2007 only covers the period from January to September, not the whole year.

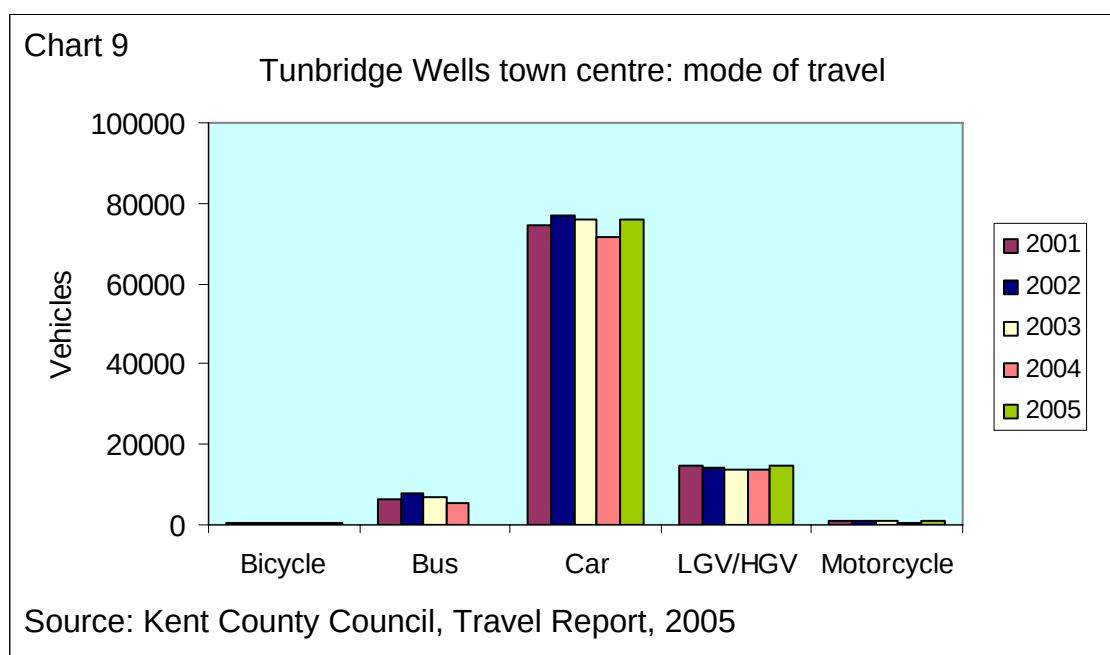


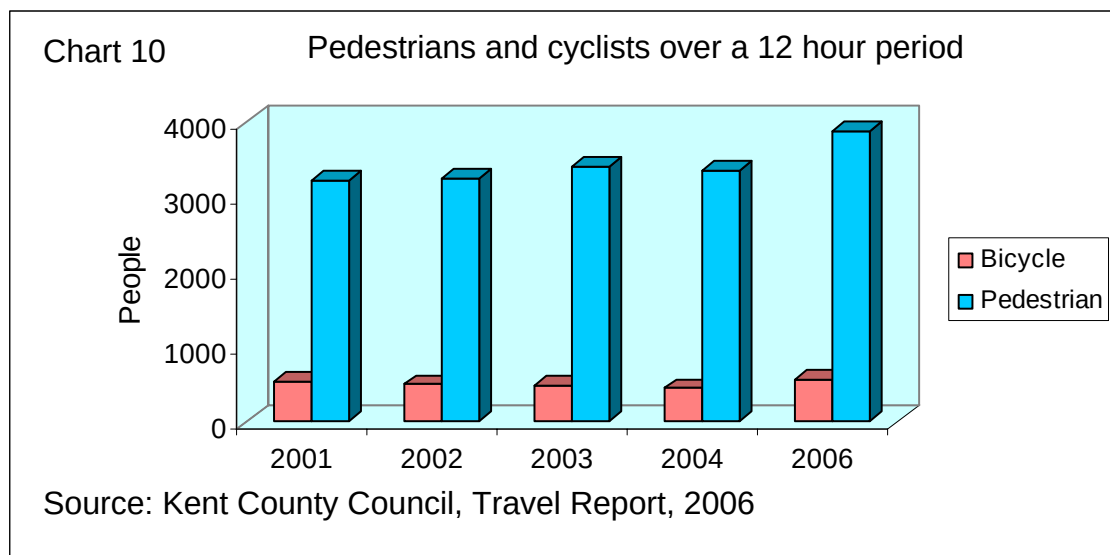


Transport

People access the town centre using a range of transport modes. Monitoring the use of these modes can give an indication of the accessibility of the town centre. Chart 9 shows the mode of transport into Tunbridge Wells town centre over a 24 hour period and Chart 10 shows cyclists and pedestrians over a 12 hour period

In 2006 and in the future, Metrocount machines will be used to collect mode of transport data over a 24 hour period. Vehicle classes will be based on axle spacing with no distinction made between buses and HGV which will be grouped together. Cyclists and pedestrians will continue to be counted over a 12 hour period.

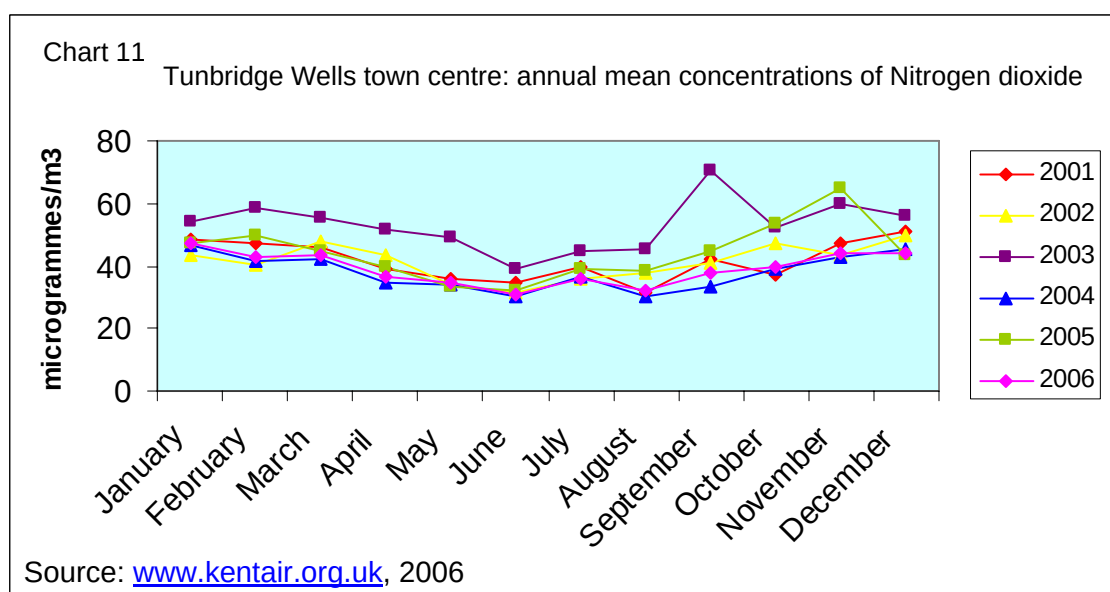




Air Quality

There is increasing pressure to quantify threats to the quality of the air we all breathe. The emissions from traffic are one of the most important sources of pollution and around 48% of the nitrogen dioxide produced in Britain is a result of road traffic. Nitrogen dioxide levels are monitored at a number of points around the county. In 2006 levels of nitrogen dioxide were recorded in microgrammes to comply with national air quality standards. In order to preserve consistency the data for 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.



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.
Service Sector	This category includes cleaning, rental, hairdressing, funeral directors, betting shops, travel agents, post offices, printing shops and shoe repairers.
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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This document is available in larger print

- Town centre properties
- Extent of town centre

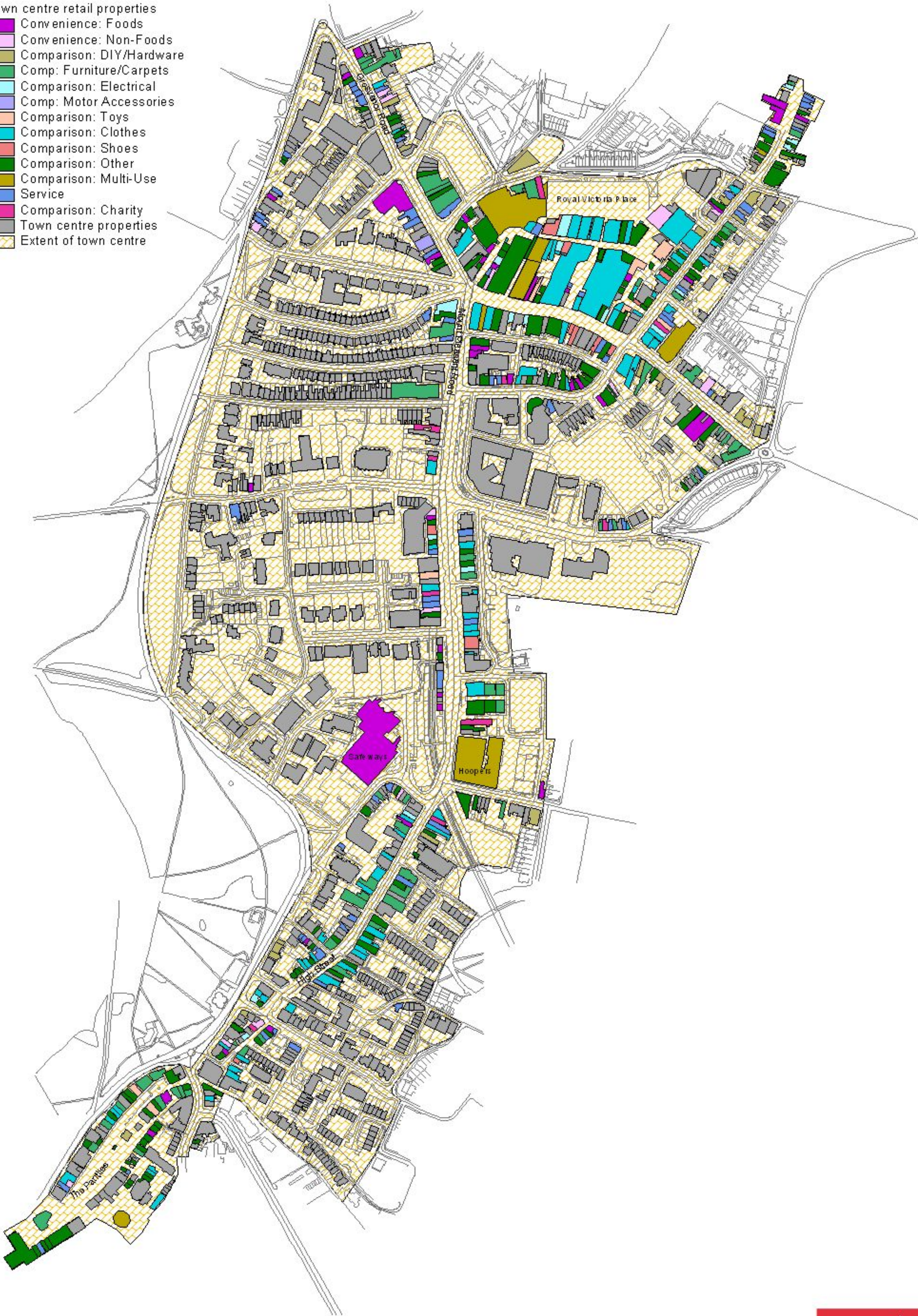


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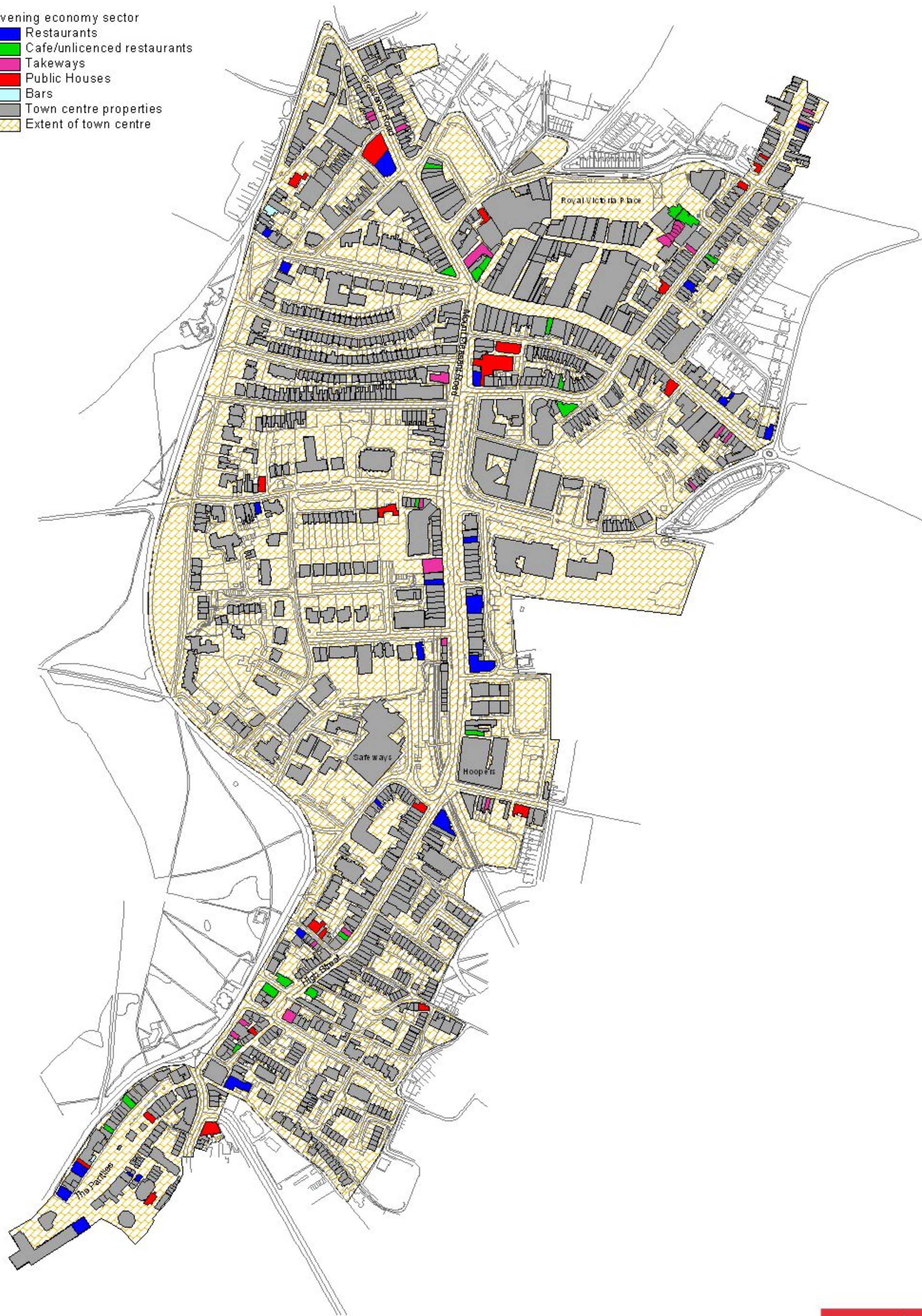
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- Town centre retail properties
- Convenience: Foods
 - Convenience: Non-Foods
 - Comparison: DIY/Hardware
 - Comp: Furniture/Carpets
 - Comparison: Electrical
 - Comp: Motor Accessories
 - Comparison: Toys
 - Comparison: Clothes
 - Comparison: Shoes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



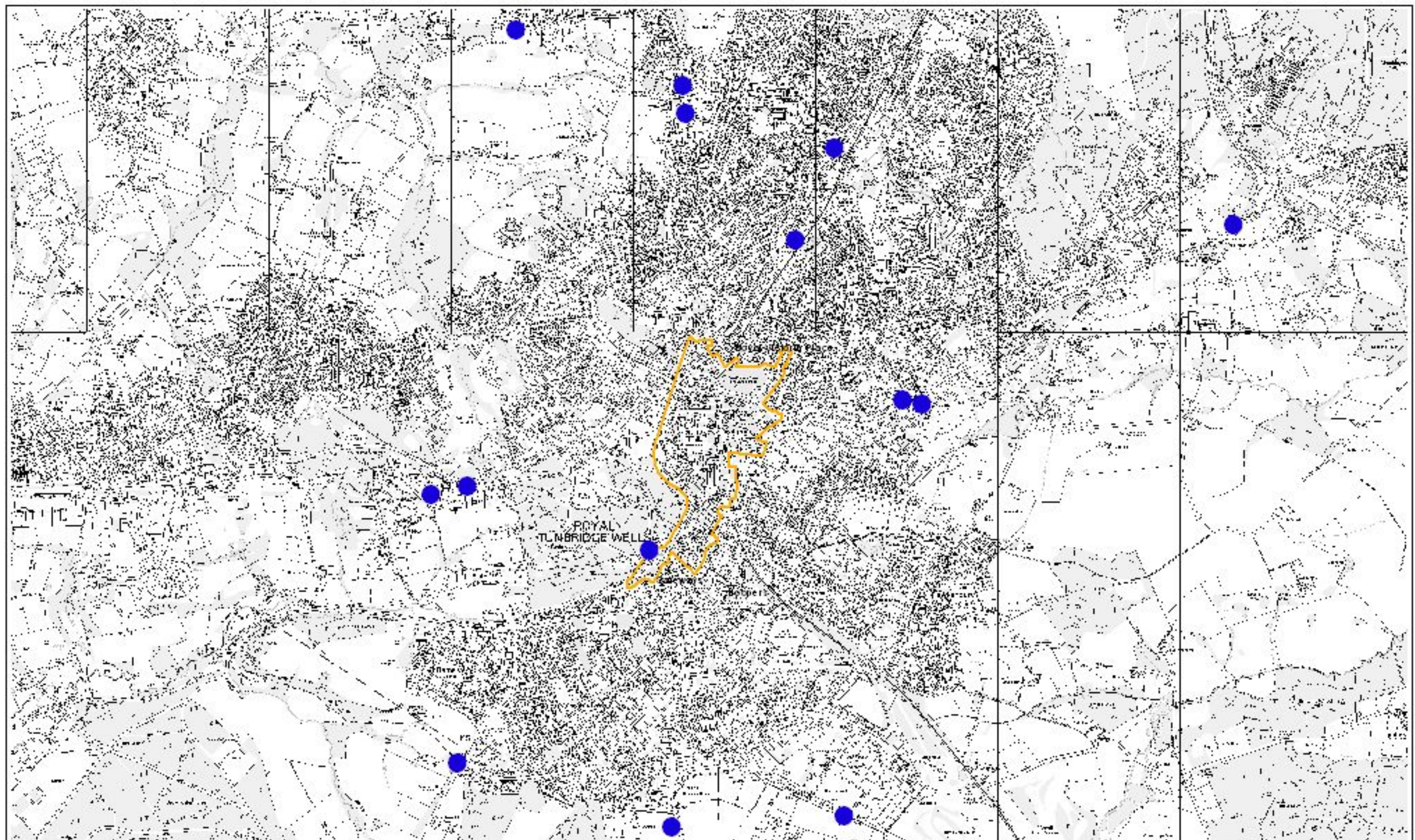
- Evening economy sector
- Restaurants
 - Cafe/unlicenced restaurants
 - Takeaways
 - Public Houses
 - Bars
 - Town centre properties
 - Extent of town centre



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- Traffic count sites
- Extent of town centre

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Appendix 1

Town centre health indicators for Kent - 2007

		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	7,579	8,814	4,895	4,852	7,523	21,492	4,371	10,659	3,136	5,941	4,602	3,171	10,216	12,001	9,562	2,637
	Convenience: Non-Foods	1,091	2,630	1,208	2,286	569	754	1,182	238	3,182	1,121	1,872	1116	469	1,565	1,097	2,461	632
	Comparison - Non bulky	30,361	104,603	33,778	29,524	13,152	35,513	40,956	11,277	98,790	15,577	29,570	15,974	15,257	19,400	18,932	76,799	9,432
	Comparison - Bulky	7,536	6,571	22,661	8,964	2,817	4,930	19,496	7,508	15,697	2,441	7,866	5,237	3,351	8,555	2,421	20,209	1,115
Evening economy Floorspace (m ²)		7937	27517	15210	12691	6218	20762	22683	10132	41483	15036	18260	6908	5987	5259	14871	27194	3295
Vacancies (% of retail properties)		12	11	26	12	10	20	16	15	16	33	26	4	12	13	10	5	5
Footfall 2007 (thousands)		U/A	U/A	U/A	21.28	U/A	20.28	U/A	9.35	U/A	12.89	21.86	U/A	11.01	15.29	U/A	U/A	U/A
Retail Yield 2007		5.38	4.00	7.25	6.13	6.50	6.00	7.25	U/A	5.25	6.25	6.13	5.25	7.88	6.38	5.25	4.88	U/A
Retail Rents (£/M ²) 2007		861	2422	538	592	U/A	753	592	U/A	1615	484	U/A	807	U/A	538	646	1615	U/A
Employment 2006 (retail)		1,118	3,077	1,459	905	597	1,215	2,350	611	3,834	624	857	947	911	1,407	1,543	4,055	430
Crime 9mths (reported incidents)	GBH	5	8	9	9	1	9	7	9	7	16	9	2	13	3	20	5	5
2007	Burglary	58	32	67	23	35	55	29	18	60	74	49	25	59	29	65	28	26
	Criminal Damage	195	133	209	159	127	201	130	180	138	285	299	67	288	117	457	131	104
	Shoplifting	121	265	215	154	49	133	314	47	437	220	90	47	82	152	157	257	59
	Theft	93	102	96	37	81	67	69	56	104	105	90	45	122	61	147	76	35

Sources: The Town Centre Audits carried out by Kent County Council, 2007 Pedestrian Flowcounts carried out by Pedestrian Market Research Services on behalf of Kent County Council, May and June 2007. The Property Market Report carried out by the Valuation Office, Autumn 2007. In Town Retail rents carried out by Colliers Conrad Ritblat Erdman Ltd. The Annual Employment Survey carried out by The Office of National Statistics, 2006. Town Centre Recorded Crime, Kent County Constabulary, Business Information Unit