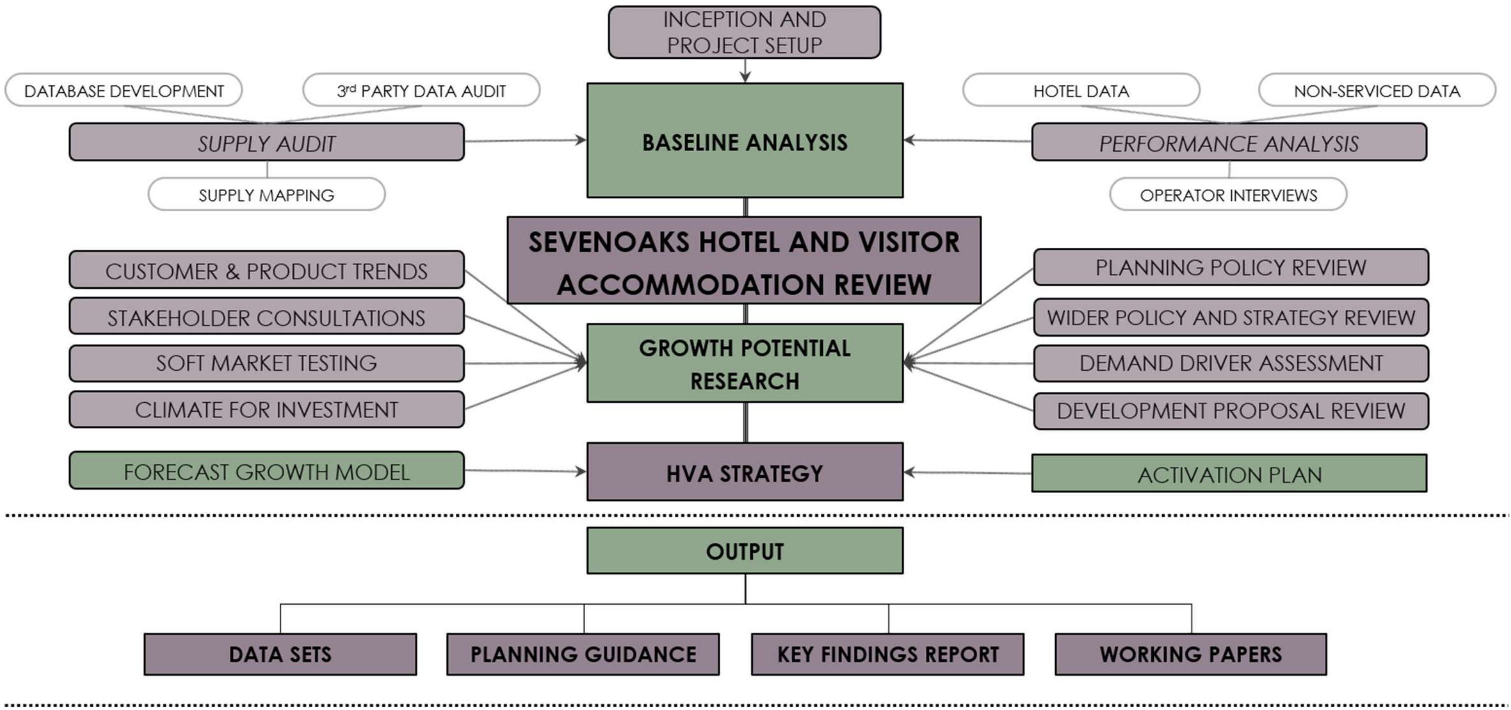
SEVENOAKS DISTRICT
HOTEL & VISITOR ACCOMMODATION STUDY
KEY FINDINGS (DRAFT)

HOTEL SOLUTIONS – JUNE 2026

1. STUDY PURPOSE & METHOD

1.1.1 This document sets out the key findings of the 2026 Sevenoaks Hotel & Visitor Accommodation Study. The study was commissioned by Sevenoaks District Council in April 2026, with a view to informing the emerging Local Plan which will get to Regulation 19 consultation stage in July 2026. The broader ambition for the study is to better understand the current hotel and visitor accommodation market and identify opportunities to ensure the district remains a premier destination for visitors and investors. The study will be used to highlight opportunities to investors, support the delivery of the Council's Local Plan, and provide the quantitative analysis necessary for tourism businesses looking to expand their offer. It will also provide an enhanced steer to planning policy and development management decision-making and a stronger evidence-led case for promoting the district for high quality accommodation investment.

1.1.2 These key findings are founded on an extensive evidence base that is set out in a series of detailed Working Papers that should be read alongside this document. The study methodology is summarised in the flowchart below.



2. HEADLINE RESEARCH FINDINGS

2.1 SUPPLY

Overall Supply – Sevenoaks District

2.1.1 Sevenoaks District's accommodation base totals **264 establishments**, providing **1,449 rooms/units/pitches** and an assumed **3,743 bedspaces**. Non-serviced accommodation dominates, accounting for 218 properties (83% of the total), while serviced accommodation accounts for the remaining 46 (17%). Non-serviced supply provides 59% of the district's rooms/units/pitches against 41% for serviced, reflecting the larger average size of hotel properties set against a more numerous but individually smaller non-serviced stock.

2.1.2 **Hotels provide 31% of all rooms** in the district from just **3% of establishments**, while **self-catering and glamping accounts for 75% of all establishments and 31% of all rooms/units**.

2.1.3 Over 500 additional hotel rooms sit immediately beyond the district, meaning Sevenoaks functions as part of a wider regional hotel catchment rather than an isolated market.

2.1.4 The accommodation mix is bottom-heavy in the non-serviced sector and top-heavy in the serviced sector, with very little genuine mid-market or lifestyle-branded product in either category. Holiday parks and resorts are absent from the district altogether.

Table 1 SEVENOAKS DISTRICT VISITOR ACCOMMODATION SUPPLY 2025

TYPE OF ACCOMMODATION	TOTAL ESTABS	% OF TOTAL	ROOMS/UNITS/ PITCHES	% OF TOTAL	ASSUMED BEDSPACES
SERVICED					
Hotels	7	**3%**	445	**31%**	890
Pub / Inn	8	**3%**	68	**5%**	136
B&B / Guest House	31	**12%**	86	**6%**	172
Total Serviced	**46**	**17%**	**599**	**41%**	**1,198**
NON-SERVICED					
Self-Catering & Glamping (ALL)	197	**75%**	451	**31%**	902
Camping, Touring & Motorhomes	18	**7%**	369	**25%**	1476
Holiday Parks & Resorts (Inc CP & FH)	0	**0%**	0	**0%**	0
Hostels, Group, Youth Accommodation	3	**1%**	30	**2%**	167
Total Non-Serviced	**218**	**83%**	**850**	**59%**	**2,545**
TOTAL – ALL ACCOMMODATION	***264***		***1,449***		***3,743***

Serviced Accommodation Supply

2.1.5 Sevenoaks District hotel and serviced accommodation supply is made up of 46 establishments providing 599 rooms and 1,198 bedspaces.

Table 2 SEVENOAKS DISTRICT SERVICED SUPPLY MIX

TYPE OF ACCOMMODATION	TOTAL ESTABS	% OF TOTAL ESTABLISHMENTS	ROOMS/UNITS/ PITCHES	% OF TOTAL ROOMS /UNITS	ASSUMED BEDSPACES	% OF TOTAL BEDSPACES
SERVICED						
Hotels	7	15%	445	74%	890	74%
Pub / Inn	8	17%	68	11%	136	11%
B&B / Guest House	31	67%	86	14%	172	15%
Total Serviced	***46***	*100%*	***599***	***100%***	**1,198**	***100%***

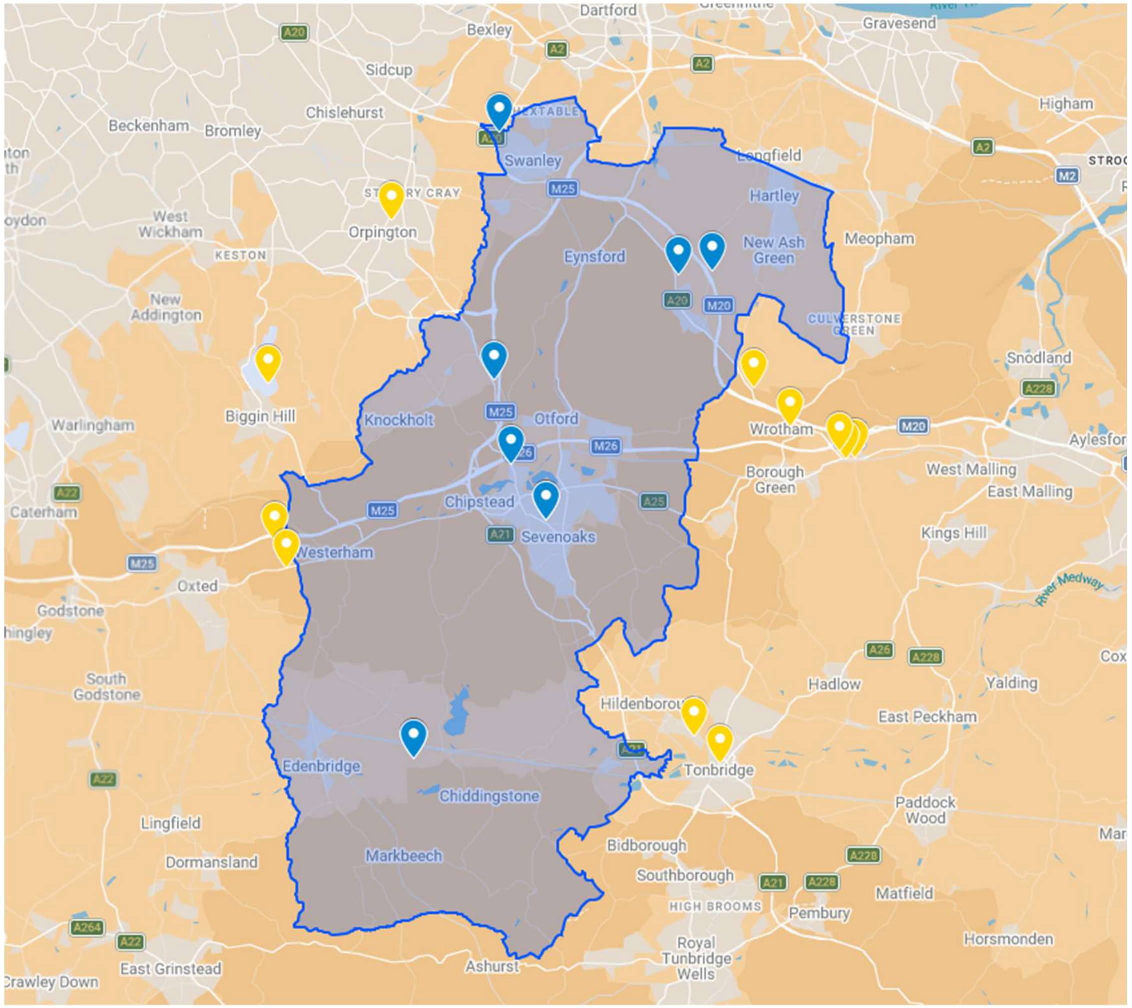
2.1.6 Hotels dominate the serviced supply proving 445 rooms and 890 bedspaces (74% of the district total). Pubs/inns and guest houses/B&Bs both make up 26% of the additional supply. Their distribution is summarised below.

Table 3 SEVENOAKS DISTRICT VISITOR ACCOMMODATION SUPPLY BY SUB AREA

TYPE OF ACCOMMODATION	SEVENOAKS		EDENBRIDGE		SWANLEY		RURAL		TOTAL	
	ESTABS.	RMS/ UNTS/ PTCH	ESTABS.	RMS/ UNTS/ PTCH	ESTAB S.	RMS/ UNTS/ PTCH	ESTABS.	RMS/ UNTS/ PTCH	ESTAB S	RMS/ UNTS/ PTCH
Hotels	5	355	1	28	1	62			7	445
Pub / Inn	7	62	1	6					8	68
B&B / Guest House	19	48	3	14	2	4	7	20	31	86
Total Serviced	***31***	***465***	***5***	***48***	***3***	***66***	***7***	***20***	***46***	***599***

2.1.7 In terms of serviced accommodation, Sevenoaks is clearly the hub for the region with 74% of serviced rooms supply with much of the more commercial elements of demand in the centre/northern parts of the district, as illustrated in the map overleaf. The widely spread geographic area, some of which to the north borders key arterial roads (M20,M25) on the outskirts of the Greater London built up area suggest that in assessing the 'market area' supply (as opposed to the strictly defined district boundary supply) some outlying hotels bordering the district should also be considered as relevant if secondary supply. An indicative estimate of the 'outside of area supply' comprises a further 9 hotels with 516 rooms effectively double supply in a wider catchment area.

Figure 1 SEVENOAKS DISTRICT HOTELS



2.1.8 Focusing on the hotel sector, within Sevenoaks District the Mercure Dartford located at Brands Hatch is by far the largest commercial hotel with 146 rooms and this together with the Donnington manor and two Premier Inns accounts for the 70% of Economy and Midscale character of supply. At the other end of the scale the Hand-Picked hotel at Brands Hatch and the Luxury B&B at Hever Castle provide distinctive high quality luxury offerings. Five out of seven hotels are part of major brands, collections or distribution networks which will help raise profile and drive business. Outside of the local market area there are 4 Premier inns, a Days Inn, a Holiday Inn and three other properties including one with spa facilities.

2.1.9 There have been some significant changes in supply, driven by a combination of factors: use of hotels for government contract; viability issues as substantial increases in operating costs have impacted profitability; and pressure from other uses for conversion, particularly from higher value residential use.

2.1.10 In Sevenoaks District there have been some significant changes to hotel supply the most significant being the loss of Royal Oak and The Moorings partly compensated by a new Premier Inn at Sevenoaks (opened 2018) and additional rooms added to the Mercure (2025). The Hever Hotel and Shambala Spa was not listed in 2015 but opened then closed resulting in 78 letting units also withdrawn from the market. Overall taking the 2015 report base supply, the effect of the loss of Moorings and Royal Oak was **a loss of 18% in rooms supply,** but once differences in categorisation of listings and new supply are taken into account the loss is only of around 34 rooms.

2.1.11 Supply of pubs with rooms is limited and that of Guest Houses and B&Bs also with some smaller family run establishments closing within the latter category.

Serviced Accommodation Supply Key Takeaways

2.1.12 **Small but concentrated stock:** 46 serviced establishments provide 599 rooms (41% of the district's total room stock from just 17% of establishments), with hotels alone accounting for 31% of all rooms in the district despite just 7 properties.

2.1.13 **Two-tier structure**: supply splits sharply between a small number of larger hotels (7 properties, 445 rooms) and a much larger, fragmented base of smaller-scale pubs/inns (8 properties, 68 rooms) and B&Bs/guest houses (31 properties, 86 rooms), with little product in between.

2.1.14 **District boundary understates true market reach**: over 500 additional hotel rooms sit just outside the district in Tunbridge Wells, Wrotham Heath and Biggin Hill, meaning Sevenoaks functions as part of a wider regional hotel catchment rather than a self-contained market.

2.1.15 **Recent churn offset by new supply**: closures (Moorings, Hever Hotel, Royal Oak, c.147 rooms) have been substantially offset by the new Premier Inn (2018) and Mercure expansion (2025), with no evidence of underlying market failure.

2.1.16 **Brand and quality gap**: supply is dominated by economy brands aside from two spa/leisure properties, with no clear mid-market or lifestyle-branded presence; the northern part of the district, and Sevenoaks itself, is identified as the most promising location for future development.

Non-Serviced Accommodation Supply

2.1.17 Non-serviced accommodation dominates the district numerically, with 218 establishments representing 83% of all accommodation stock, providing 850 rooms/units/pitches (59% of the district total) and an assumed 2,545 bedspaces. This is a much larger and more fragmented sector than serviced accommodation, spread across a number of distinct forms with very different characteristics, scales and levels of maturity.

2.1.18 **Self-catering and glamping** is by far the largest accommodation type in the district in any terms, with 197 establishments representing 75% of all accommodation stock in Sevenoaks, serviced or non-serviced. It provides 451 rooms/units, 31% of the district total, comparable in scale to the hotel sector's room count, and an assumed 902 bedspaces.

Table 4 SEVENOAKS DISTRICT - AVERAGE ANNUAL SELF CATERING LISTINGS OVER TIME

Supply Group	Average Annual Active Listings					Growth 2025 vs 2021
	2021	2022	2023	2024	2025	
Houses, Cottages & Villas	81	104	106	99	125	+54%
Apartments & Rental Units	14	17	18	19	20	+35%
Barns & Agricultural	9	9	9	8	10	+17%
Cabins, Chalets & Pods	8	8	8	8	8	-
Glamping & Tiny Homes	6	6	6	6	6	-
Whole Property subtotal	**118**	**144**	**147**	**139**	**168**	**+43%**
Private Rooms	30	37	40	27	28	-5%
TOTAL	**148**	**180**	**187**	**166**	**197**	**+33%**

2.1.19 This is the most established and fastest-growing non-serviced segment. Total active listings grew by 33% between 2021 and 2025, from 148 to 197 average annual listings, though growth has not been uniform across the sector. Whole-property accommodation, which excludes private room lettings, grew more strongly still, up 43% over the same period, from 118 to 168 listings, and now represents the clear majority of supply.

2.1.20 Within whole-property accommodation, houses, cottages and villas are both the largest supply group and the fastest-growing, up 54% from 81 to 125 listings and now accounting for the majority of whole-property stock. Apartments and rental units grew by 35%, from 14 to 20 listings. Barns and agricultural conversions grew more modestly, up 17% from 9 to 10 listings, a smaller percentage increase but one consistent with the limited number of convertible rural buildings available rather than weak demand. Cabins, chalets and pods, and glamping and tiny homes, both remained flat at 8 and 6 listings respectively across the period, indicating a static rather than growing supply base in these smaller experiential categories.

2.1.21 Private room lettings, by contrast, declined by 5%, from 30 to 28 listings, the only supply group in the district to show a fall over the period. This suggests a market that is shifting away from ad hoc room-letting and towards dedicated whole-property self-catering, consistent with the sector's broader professionalisation.

2.1.22 The strongest existing and prospective supply lies in the reuse of existing buildings, particularly barn conversions, redundant agricultural buildings and other estate structures, which limit new built form while supporting farm and estate diversification. Larger group-capable properties are a notable and growing feature of the stock, though they carry higher local impact considerations around parking, access, noise and servicing.

2.1.23 **Camping, Touring and Motorhome** accommodation comprises 18 establishments, 7% of the district total, providing 369 pitches, 25% of total rooms/units/pitches in the district, and an assumed 1,476 bedspaces, the highest bedspace assumption of any accommodation type due to the higher typical occupancy per pitch. Supply is dominated by one large campsite alongside a wider mix of small rural, certificated, glamping and motorhome stopover sites.

Table 5 SEVENOAKS DISTRICT - CAMPING, TOURING AND MOTORHOME PROVISION

Supply category	Number of sites	Pitches, spaces/units
Large camping / touring sites, 100+ pitches	1	200
Medium camping / touring sites, 26 to 99 pitches	3	106
Small certified / small campsite provision, 1 to 25 pitches	5	42
Glamping-led fixed accommodation	3	15
Motorhome pub / informal stopover locations	6	6
Total supply	**18**	**369**

2.1.24 Sevenoaks District has **no holiday lodge park or resort** provision. Surprising based upon the rurality of the district but partially explained by the constrained landscape, dominated by the Greenbelt.

2.1.25 **Hostels, group and youth accommodation** is the smallest sector in the district by every measure, with just 3 establishments (1% of the total), 30 rooms/units (2% of total rooms/units/pitches) and an assumed 167 bedspaces. Supply is limited to a small number of specialist retreat, faith-based and wellness venues, with Bore Place the principal asset in this category.

Table 6 SEVENOAKS DISTRICT HOSTEL, GROUP & YOUTH ACCOMMODATION

Supply category	Number of sites / locations	Capacity (bedspaces)
Large group / retreat estate	1	68 bedspaces
Nature / eco / creative retreat venue	1	24 bedspaces, with higher seasonal/event capacity
Faith-based residential venue	1	75 Bedspaces
Dedicated hostel / bunkhouse provision	0	0
Total Supply	**3**	**167**

Non-Serviced Accommodation Supply Key Findings

2.1.26 **Dominant by volume, not by capacity concentration**: 218 non-serviced establishments (83% of the district's total) provide 850 rooms/units/pitches (59% of total capacity), a much larger but more fragmented base than serviced accommodation, spread across four distinct forms of very different scale and maturity.

2.1.27 **Self-catering and glamping is the core of the sector**: 197 establishments (75% of all district accommodation) provide 451 rooms/units, on a par with the hotel sector's room count, and the segment has grown strongly (active listings up 33%, whole-property up 43% since 2021), driven by professionalisation rather than proliferation.

2.1.28 **Outdoor accommodation is modest but established:** camping, touring and motorhome provision comprises 18 locations and 369 pitches (the highest bedspace assumption of any type), dominated by one large campsite alongside a mix of smaller rural, certificated and glamping sites.

2.1.29 **One accommodation type is entirely absent:** holiday parks and resorts return a nil supply across every measure, the only complete gap in the district's accommodation mix and a notable one given the area's rural appeal and proximity to London.

2.1.30 **Group accommodation is niche but real:** hostels, group and youth accommodation is the smallest sector (3 establishments, 30 rooms/units), anchored by Bore Place, with no dedicated hostel or bunkhouse provision identified anywhere in the district.

2.2 DEMAND & PERFORMANCE

<u>Serviced Accommodation Performance Overview</u>

Hotels

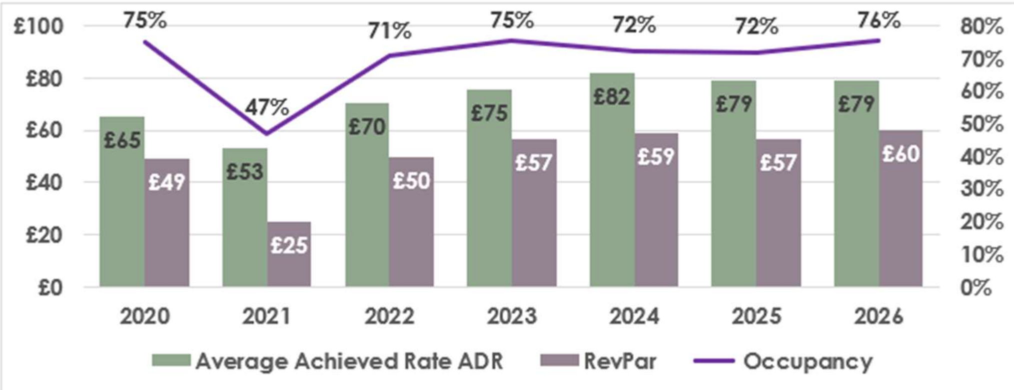
2.2.1 The five-year trend in hotel performance shows a strong, consistent recovery. Occupancy fell to 47% in 2021 before recovering to the low-to-mid 70s from 2022 onwards, reaching 76% in the twelve months to April 2026, the strongest year in the series. The average achieved daily rate (ADR) followed the same pattern, dropping to £53 in 2021, peaking at £82 in 2024, and settling at £79 in 2025-26. The revenue achieved averaged per available rooms (RevPAR) fell 49% in 2021 before rebounding 100% in 2022, and has grown steadily since to £60 in 2026, up 6% year-on-year.

Table 7 SEVENOAKS DISTRICT MARKET AREA TRENDS

SEVENOAKS DISTRICT MARKET AREA TRENDS TREND OF KEY PERFORMANCE INDICATORS 2020-2026 (12mths to April)							
Year	**2020**	**2021**	**2022**	**2023**	**2024**	**2025**	**2026**
Occupancy	75%	47%	71%	75%	72%	72%	76%
Average Achieved Rate ADR	£65	£53	£70	£75	£82	£79	£79
RevPAR	£49	£25	£50	£57	£59	£57	£60
RevPAR growth year on year		*-49%*	*100%*	*14%*	*4%*	*-4%*	*6%*

2.2.2 Seasonality is pronounced: May to October delivers occupancy of 75%-83% with peak-month ADRs of £90+, and weekly demand peaks on Tuesday and Wednesday nights, consistent with a substantially corporate market. This points to some demand displacement beyond the district boundary at busy times.

Table 8 SEVENOAKS DISTRICT ANNUAL PERFORMANCE KPIs OVER TIME



2.2.3 Benchmarked externally, Sevenoaks' RevPAR of £60 sits above the West Kent regional average (£55.5) but below Tunbridge Wells (£63.8) and the England Occupancy Survey excluding London (£75.7, reflecting that survey's inclusion of major conurbations). Sevenoaks occupancy (76%) is broadly comparable to or ahead of both comparators, while ADR (£79) lags both, indicating a market that fills well but has not yet captured comparable rate growth.

Pubs with Rooms

2.2.4 No dedicated performance dataset for pubs with rooms exists; national surveys typically absorb this segment into a general "smaller establishments" category. The 2025 Pub Accommodation Review, Visit England data and operator research indicate performance below hotel sector levels, consistent with Visit England's finding that countryside settings run around 10% below city/large town hotels (61%-65% against 72%-74% occupancy, 2019-2023).

Table 9 INDICATIVE OCCUPANCY LEVELS BY SETTING

SELECT VISIT ENGLAND DATA				
Room Occupancy	**2019**	**2021**	**2022**	**2023**
City / Large Town	72%	56%	72%	74%
Small Town	65%	56%	67%	68%
Countryside	**61%**	**54%**	**62%**	**65%**
Seaside	64%	59%	62%	64%

2.2.5 Applied to Sevenoaks, this suggests annual occupancy of 57%-65% by volume, with ADR ranging from the high £70s to £100-£150 depending on quality, and steep weekend/summer peaks above 90%. Average nightly spend is £106, though length of stay has slipped from 2.2 to 1.9 nights since 2023, likely reflecting cost pressure on consumers.

Guest Houses and B&Bs

2.2.6 The least data-rich segment, as owner-operators keep informal records rather than structured metrics. Trading is highly seasonal: strong April-October, often fully booked at weekends and in peak summer, with low winter occupancy. Annual occupancy likely ranges from below 50% up to a maximum of around 60%.

2.2.7 In terms of key markets, demand is strong midweek from corporates (Tuesday/Wednesday), with weekends leisure-focused and Saturdays strongest. Corporate demand spans a wide catchment, reinforced by infrastructure projects such as the Lower Thames Crossing and the district's strong road connectivity. Leisure demand includes coach tours, Brands Hatch events, conferences, weddings and weekend/spa breaks.

2.2.8 Looking ahead, operators were broadly positive on prospects but noted the corporate market is a fixed pool shared among existing hotels, with some concern over prospective supply from the London Golf and potential Wasps projects. "Sevenoaks" was also flagged as a weak marketing label, with some properties using "Dartford" instead. Specialist spa and dining offers were seen as effective in attracting repeat leisure custom.

Serviced Accommodation Performance Key Takeaways

2.2.9 The **trading performance based on benchmark data is relatively strong** with 2026 (12mths rolling year to date performance) showing an average of 76% occupancy, almost £80 in ADR. Certain properties are achieving ADRs in excess of this in the £80-£90 range and smaller luxury properties £125+. Pubs and Guest houses perform less well but only in line with regional UK averages.

2.2.10 **Seasonality patterns of hotel demand demonstrate 75%-80% + average monthly occupancies for six months**. This indicates some displacement of demand out of the area in peak periods and is supported by further evidence of weekly seasonality patterns (based on Kent West figures) that show peaks in demand on Tuesday and Wednesday nights.

2.2.11 The **size of the local market is limited in population terms but nevertheless future prospects for the area appear good**. It offers a strategic location, good access and is close to major conurbations and Kent tourism attractions with access to corporate drivers both in the district and outside of it within relatively easy driving time.

2.2.12 Given the characteristics and appeal of the area as a place to stay together with existing tourism drivers, the market is likely to be able absorb any 'replacement' inventory. Excess demand and a strategic rationale in having a presence in the area together with excellent road links will appeal to larger branded hotels. These factors alone could attract hotel brands keen to obtain a presence and provide a differentiated design or brand offer with alternative concepts to those in the current market.

2.2.13 In terms of location **the northern part of the district (and Sevenoaks itself) appears to have more appealing characteristics**. The case for considering the area as a hotel location will be strengthened by any identifiable growth in commercial profile or economic and/or tourism drivers provided in our review in the next section of this report.

Non-Serviced Accommodation Performance

Self-Catering Performance

2.2.14 The market is sizeable and active, with around 197 active listings in 2025 generating approximately 30,900 booked nights and £6.55 million total estimated revenue. Average occupancy is 43%, ADR approximately £205, RevPAL (Revenue per Available Listing) around £91, equivalent to annualised revenue per listing of around £33,300. Average length of stay is 4.7 nights and average lead time 69 days, indicating meaningful multi-night, well-planned demand rather than short-stay churn.

Table 10 SEVENOAKS DISTRICT SELF-CATERING PERFORMANCE KPIs

SEVENOAKS Current self-catering performance metrics	Current performance
Average active listings	197
Total Market booked nights	30,893
Blended Annual Occupancy	43.10%
ADR	£205
RevPAL	£91
Average monthly revenue per listing	£2,772
Annualised revenue per listing	£33,267
Total market revenue	£6.55m
Average length of stay	4.7 nights
Average booking lead time	69 days

2.2.15 **Performance varies clearly by size, subtype, quality and season**, but the pattern is consistent throughout: **space, quality, rural character and distinctive experience outperform standard units and private rooms**. Smaller properties dominate supply by volume, but four-bedroom-plus properties match the market's average occupancy (45%) while commanding far higher ADR (£704) and RevPAL (£338), producing annual revenue per listing of £65,083, more than double the next-best band. Larger properties are therefore high-value through utilisation as well as rate.

2.2.16 **By subtype**, cottages (45% occupancy, £240 ADR, £116 RevPAL) and barn conversions (53% occupancy, £199 ADR, £95 RevPAL) are the strongest performers, the latter particularly significant given their fit with the district's rural character and diversification policy interest. Farm stay/estate properties show very high ADR (£629) and RevPAL (£483), though from a small sample, best read as an indicator of premium potential rather than a typical benchmark. Tiny homes and annexes achieve the highest occupancy of any subtype (69%, small base), suggesting strong demand for compact, distinctive accommodation, while private rooms/B&Bs perform weakest (33% occupancy, £113 ADR, £33 RevPAL), confirming the market is now whole-property led.

2.2.17 **By quality tier**, the upper-mid band (£150-£230 ADR) achieves the strongest occupancy (46%), while the premium band (£230+) achieves the strongest RevPAL (£216) despite lower occupancy (38%). Budget and mid-market tiers underperform on RevPAL by comparison, confirming that Sevenoaks performs best where quality and value are balanced, supporting a focus on quality-led accommodation over volume growth.

Table 11 SEVENOAKS DISTRICT SELF-CATERING PERFORMANCE BY QUALITY TIER

Quality tier	Share of supply	Occupancy	ADR	RevPAL	Lead time	Length of stay
Q1 Budget, ADR below £100	29%	41%	£77	£34	59.3 days	3.8 nights
Q2 Mid-market, £100 to £150	26%	44%	£123	£56	58.4 days	5.0 nights
Q3 Upper-mid, £150 to £230	21%	46%	£184	£87	75.7 days	4.4 nights
Q4 Premium, £230+	24%	38%	£500	£216	80.1 days	4.2 nights
All listings	100%	42%	£210	£93	67.6 days	2.4 nights

2.2.18 **Length of stay and lead time** reinforce this pattern: three-bedroom properties record the longest stays (6.0 nights) against one-bedroom's shortest (3.8 nights), and lead time rises to around 99 days for four-bedroom-plus properties, reflecting the more advanced planning behaviour of family and group visitors.

2.2.19 **Seasonally**, the market is strong but not summer-dependent alone, August peaks (54% occupancy, £111 RevPAR), July close behind (50%, £109), and shoulder months (April, June, October) hold at 45-46% occupancy. January and November are weakest (33% and 36%), though December outperforms expectations (41%), likely reflecting Christmas and winter-break demand. This supports investment in accommodation with year-round appeal, particularly cottages, barn conversions and premium rural properties.

Table 12 SEVENOAKS DISTRICT SELF-CATERING PERFORMANCE BY MONTH/SEASONALITY

Month	Active listings	Booked nights	Occupancy	ADR	RevPAL	Average monthly revenue per listing	LOS	Lead time
January	192	1,964	33%	£235	£84	£2,586	6.7	43.8 days
February	193	2,108	39%	£213	£92	£2,563	4.9	42.7 days
March	196	2,309	38%	£201	£87	£2,704	5.4	51.2 days
April	196	2,705	46%	£195	£89	£2,677	4.7	74.2 days
May	198	2,701	44%	£199	£86	£2,669	4.1	82.6 days
June	199	2,687	45%	£208	£97	£2,902	5.5	75.6 days
July	204	3,162	50%	£212	£109	£3,375	4.8	82.1 days
August	204	3,415	54%	£189	£111	£3,446	4.1	90.0 days
September	201	2,653	44%	£200	£84	£2,534	4.4	75.2 days
October	195	2,720	45%	£198	£80	£2,474	3.7	76.2 days
November	195	2,106	36%	£201	£82	£2,455	4.3	57.6 days
December	186	2,364	41%	£213	£93	£2,881	4.3	78.0 days

Camping, Caravan and Motorhome Performance

2.2.20 Performance evidence is much thinner than for self-catering, with no consistent public data on site-level occupancy, pitch rates or revenue; the assessment relies on published opening periods, tariffs and site scale. The sector is more seasonal, concentrated between May and September and driven by school holidays, bank holidays and weather. Larger seasonal campsites depend heavily on peak summer trade, certificated and small farm sites trade through low-density repeat-user demand, and motorhome stopovers likely have a longer season given their use by self-contained vehicles. The clearest opportunity is motorhome stopover provision, where managed Aires can generate revenue from modest infrastructure, particularly linked to pubs, attractions, farm businesses or Council-owned car parks.

Group Accommodation, Hostels and Retreats Performance

2.2.21 This sector also lacks consistent public performance data, as venues typically trade through packages, exclusive-use bookings, events and residential courses rather than nightly sales. Supply is small and specialised: Bore Place is the principal asset, with the broadest demand base across education, environmental learning, group stays, weddings, retreats and corporate activity, supporting more resilient performance than single-market venues. The Quadrangle serves a retreat, nature and arts niche, Otford Manor/Oak Hall serves the faith-based residential market, and Little Elses provides smaller-scale wellness and glamping accommodation. This is not a high-volume sector, but it holds strategic value, serving markets not well catered for by hotels or standard self-catering, and is better assessed through its ability to attract organised groups and generate midweek or off-peak demand than through occupancy and price alone.

Key Non-Serviced Performance Takeaways

2.2.22 The current non-serviced accommodation performance evidence shows a sector that is varied. **Self-catering is the strongest and most measurable component**. It has a substantial active supply base, generates meaningful booked nights and revenue, and shows clear differences in performance by property size, subtype, quality tier and season.

2.2.23 **The best-performing self-catering segments are those that offer space, quality, rural character or distinctive visitor experience**. Larger properties outperform the market. Barn conversions, cottages, farm/estate stays and upper-mid to premium properties show strong strategic value. Tiny homes and experiential accommodation show strong utilisation where they exist, although the sample size is small.

2.2.24 **Camping, caravan and motorhome accommodation provides important lower-cost and outdoor visitor capacity**, but performance cannot be measured robustly from public data. Its strongest role is likely to be seasonal family and outdoor recreation demand, small rural sites and managed motorhome stopovers. Group accommodation and retreat provision is small, but strategically important because it serves organised residential, education, wellness, faith and corporate markets.

2.2.25 The combined conclusion is that Sevenoaks' non-serviced accommodation sector is not simply a lower-cost alternative to hotels. It is a **flexible, experience-led and increasingly professional part of the visitor accommodation base**. The main current performance standouts are in supporting the parts of the market that are distinctive, resilient and well aligned with the district's assets: larger self-catering properties, barn conversions, high-quality rural stays, experiential glamping, managed motorhome stopovers and retreat/group accommodation linked to existing rural assets.

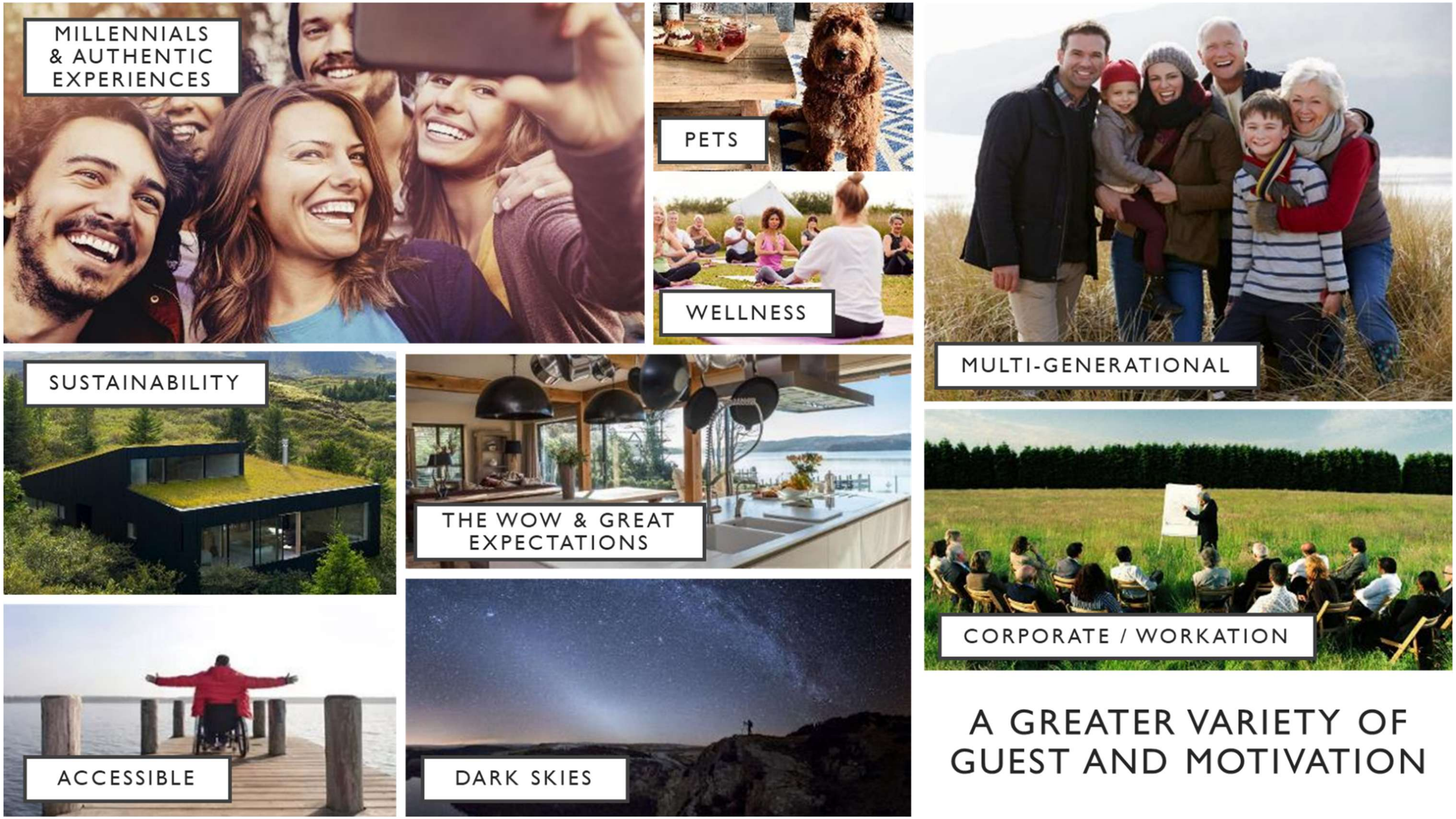
2.3 MARKET & PRODUCT TRENDS

2.3.1 Visitor accommodation demand is being reshaped by a clear shift towards higher-quality, experience-led stays. Travellers are increasingly seeking fewer but better trips, with stronger expectations around comfort, design, service, authenticity and access to nature. This is reinforcing demand for premium rural escapes, wellness breaks, distinctive accommodation, multi-generational and group stays, dog-friendly provision and accessible accommodation. Across these segments, the accommodation itself is no longer simply a functional base, but a central part of the visitor experience.

2.3.2 New and fast-growing trends are also changing how accommodation should be positioned and marketed. Gen Z is emerging as a distinct travel market, placing greater emphasis on experiences, sustainability, direct booking and discovery through short-form digital content. AI-assisted trip planning, online travel agents and digital visibility are becoming increasingly important to whether properties are found and booked. At the same time, trends such as coolcationing, noctourism, sleep tourism, premium pet-friendly travel, set-jetting and crowd avoidance are creating opportunities for destinations and operators that can offer distinctive, year-round experiences.

2.3.3 The wider market context points to continued resilience in domestic tourism, but with guests becoming more selective and value-conscious. Short breaks of one to three nights are increasingly common, with visitors spending more per trip while expecting a high standard of accommodation and service. For new development, this places a premium on professional management, strong specification, clear market positioning and digital discoverability. Properties that combine hotel-level comfort with local distinctiveness, sustainability, flexibility and year-round appeal are best placed to perform in the evolving visitor accommodation market.

2.3.4 Sustainability is a key concern, with travellers preferring eco-friendly options and supporting local economies. Emerging niches like astro-tourism (dark sky experiences) and unique stays (treehouses, converted castles) cater to those seeking unforgettable 'wow' moments. The market is shifting towards blended offerings, combining accommodation with activities, as travellers increasingly seek curated, immersive experiences.



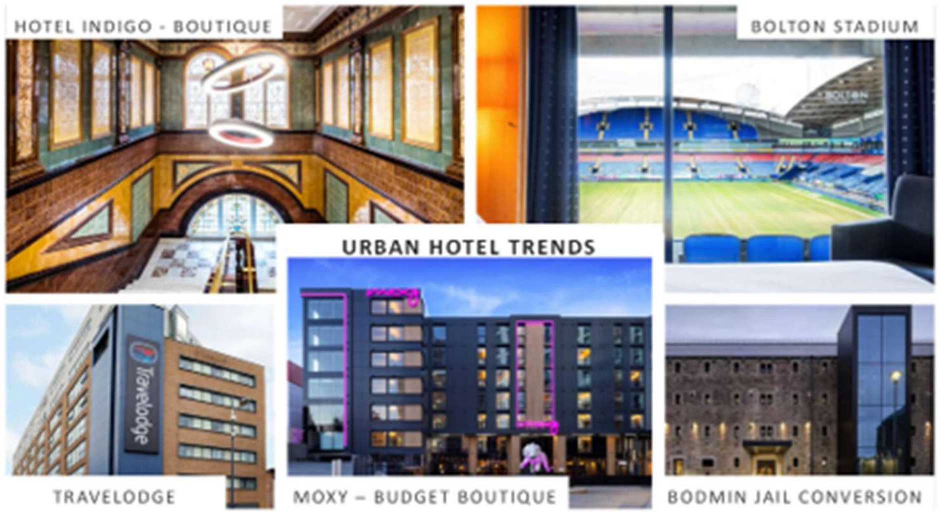
2.3.5 The review of hotel and visitor accommodation **product development trends** has demonstrated the significant levels of innovation and change that is on-going across the hotel and visitor accommodation sector, in rural and urban locations. These potentially represent Sevenoaks' competitive set. The sort of innovations being seen in hotel and visitor accommodation product development are setting a new bar in the market in terms of customer expectations as well as helping re-shape and define destinations alongside wider product development activity. They should also provide inspiration to existing accommodation operators and those in the wider development market interested in bringing new hotel and visitor accommodation forward here.

2.3.6 In **rural** settings:

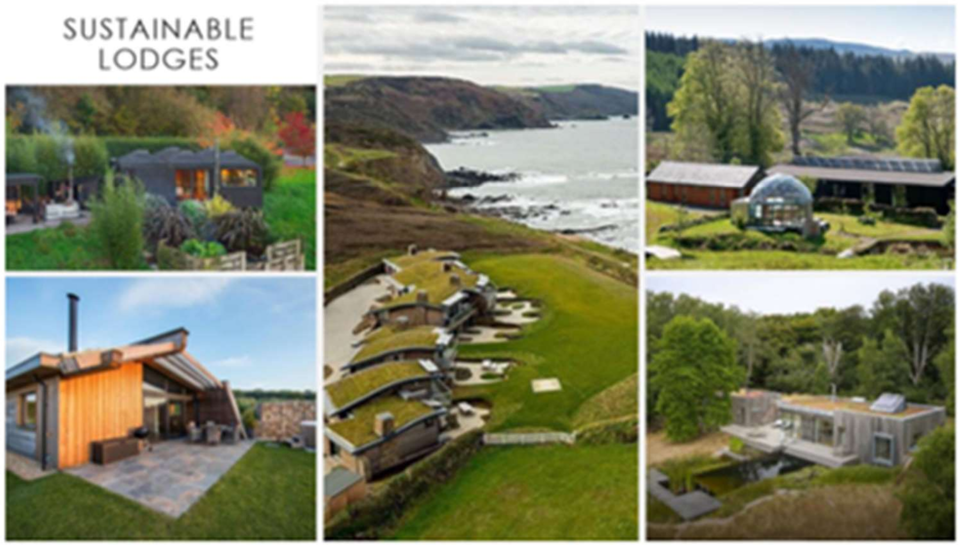
- Key trends reflect growing demand for countryside escapes, eco-friendly holidays, and experiential travel, leading to diverse developments such as integrated resorts blending accommodation with curated activities, luxury boutique stays emphasising local charm, and eco-conscious lodgings like off-grid cabins and carbon-neutral retreats.
- Deconstructed hotels offer private cabins with shared amenities, while activity-centric stays (e.g. fishing lodges, glamping) cater to niche interests.
- Wedding resorts and upscale glamping—including treehouses and motorhome Aires—appeal to event-goers and comfort-seeking adventurers, while modernised campsites and wellness retreats with spas and nature therapies meet demand for affordable yet elevated and restorative experiences.
- These trends highlight a shift towards immersive, sustainable, and high-quality rural tourism.

2.3.7 In **urban** environments:

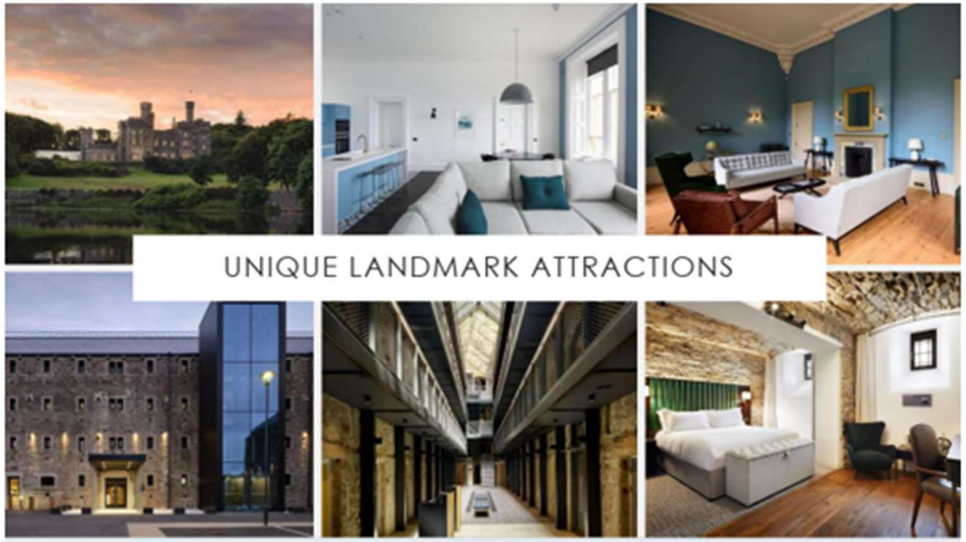
- The hotel sector has evolved to cater to diverse market segments, with budget chains like Premier Inn, Travelodge, and Ibis dominating through scalable leasehold models and differentiated offerings (e.g. upper-tier budget and budget boutique concepts such as Holiday Inn Express, Moxy, and Z Hotels).
- Compact, high-tech micro-hotels (e.g. Yotel, Bloc) maximize space in city centres, while boutique hotels (e.g. Hotel du Vin, Malmaison, Hotel Indigo) thrive through conversions or new builds, blending design, food, and atmosphere.
- Serviced apartments and aparthotels (Staycity, Roomzz, Marriott's Residence Inn) have expanded beyond business travel, gaining leisure appeal post-Covid.
- Stadium and attraction-linked hotels (e.g. Marriott at Twickenham, themed lodges at Alton Towers) leverage events and tourism, while deconstructed hotels (e.g. The Tawny) offer dispersed, immersive stays with private units and shared amenities.
- These trends highlight a shift toward flexibility, experience-driven stays, and space-efficient urban solutions in a competitive market.


HOTEL INDIGO - BOUTIQUE
BOLTON STADIUM
URBAN HOTEL TRENDS
TRAVELODGE
MOXY – BUDGET BOUTIQUE
BODMIN JAIL CONVERSION


RURAL PRODUCT TRENDS
CONVERSION
LARGER SUSTAINABLE UNITS
CONTEMPORARY BUNKHOUSE
PODS IN TREES AND ON THE GROUND
FARM STAYS
DECONSTRUCTED HOTELS

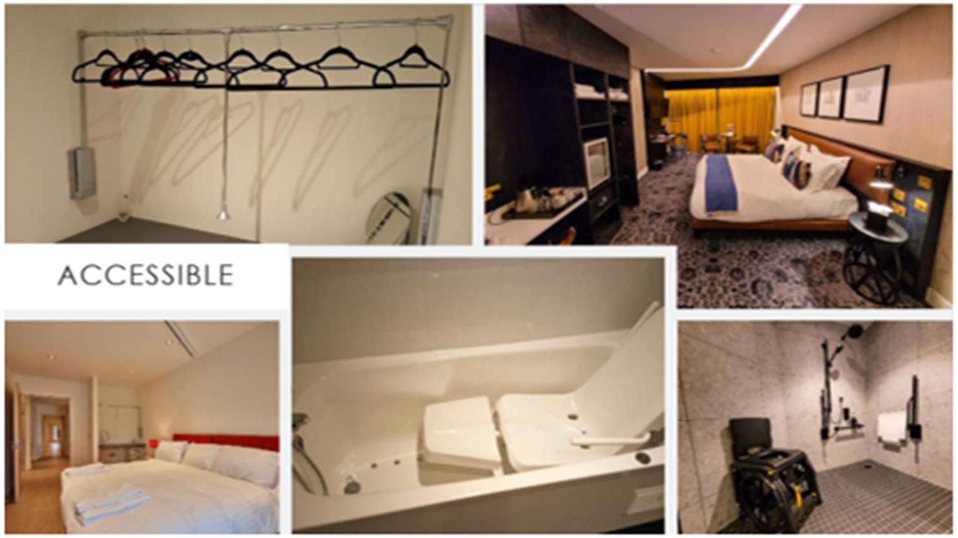

SUSTAINABLE LODGES


DECONSTRUCTED DESTINATION HOTELS


UNIQUE LANDMARK ATTRACTIONS


SUPER "COTTAGES"

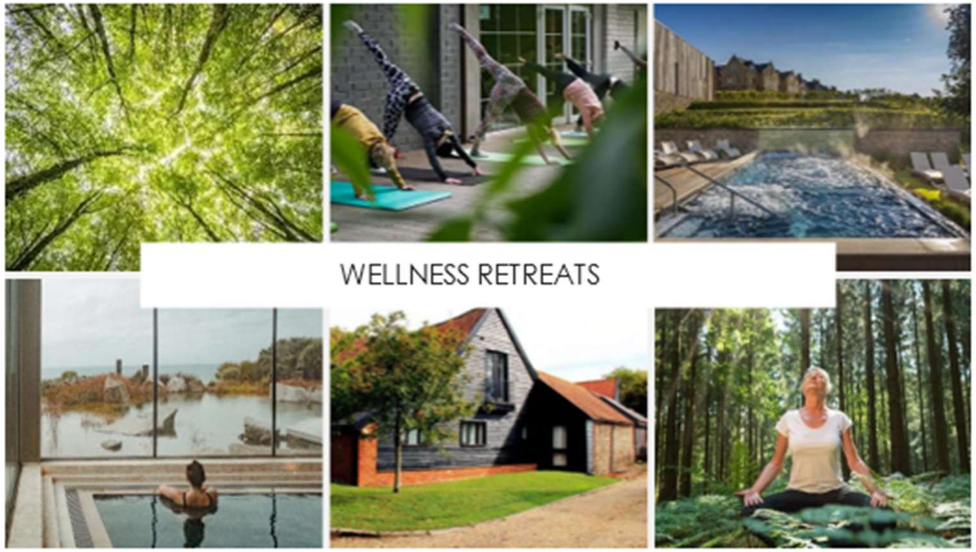

STARGAZING


ACCESSIBLE


HERITAGE CONVERSIONS


MODERN, SUSTAINABLE LODGE PARKS


LARGER SUSTAINABLE UNITS & CONTEMPORARY HOSTELS


WELLNESS RETREATS

2.4 DESTINATION ASPIRATION & GROWTH DRIVERS

2.4.1 In terms of destination aspiration, some of the **key themes** emerging from the policy and strategy documents are summarised in the adjacent word cube – themes that the delivery of new hotel and visitor accommodation can help reflect and deliver.

2.4.2 Despite a framework for development that is constrained by Green Belt and National Landscape designations, the Council is keen to see growth in the visitor economy and particularly in overnight stays, has identified a shortage of accommodation as holding growth back, and a need for more accommodation provision. In addition, tourism and visitor accommodation has the ability to help deliver a vibrant rural economy and support diversification, at the same time as growing the visitor economy.

2.4.3 As well as current and latent demand, some major developments of housing, employment land and infrastructure will drive new demand for visitor accommodation. Without a sufficient supply of visitor accommodation, this demand will be displaced to surrounding areas and the overnight stay benefits lost to Sevenoaks, despite increased tourism activity.

2.4.4 Proposed planning policies for the sector are positive in the face of significant challenges, which provides opportunities to permit and a facilitating framework going forward. In doing so, the opportunity to direct the type of accommodation development that comes forward so that it reflects and helps deliver the destination aspiration themes above should be seized in order to secure a diverse range of new and innovative visitor accommodation development, deliver increased capacity for peak periods, broaden market appeal, and help boost staying visits as well as dwell time and associated visitor spend.

2.5 THE PLANNING FRAMEWORK

2.5.1 In terms of the **national planning framework**, the NPPF says relatively little about tourism development. Whilst hotels are recognised primarily as a town centre use, NPPF does reference rural tourism and the benefits it can bring to rural economies. This includes recognition that certain types of development in rural areas may have specific locational needs, including sites to meet business needs in rural areas that may be beyond settlement boundaries and in locations not well-served by public transport. In other changes to the national planning framework, the introduction and review of 'Grey Belt' could open up some opportunities for visitor accommodation development in the countryside, and the proposed introduction of a new use class for short term lets plus a registration process should help tighten up regulation around the sector.

2.5.2 **At a local level**, the proposed tourism policy approach in the July 2026 Regulation 18/19 consultation (EMP5 and EMP4) is strong in terms of both the policy framework and the supporting text. Specifically:

- It demonstrates positive support for the growth of the visitor economy and for the retention and new development of visitor accommodation in Sevenoaks
- It draws on an evidence base that has identified shortfalls of accommodation and active support to increase visitor accommodation supply, providing 'hooks' in wider policy on which to hang future planning approvals especially in 'challenge' locations
- The positive permissive policy also specifically refers to locations in the Green Belt, albeit in accordance with national Green Belt policy and tests
- It recognises the need and opportunity for visitor accommodation to support diversification of farms, pubs, attractions. Facilities and other types of business, and to aid their future viability and sustainability
- It allows for an element of new build, albeit it needs justifying – even at scale
- It provides clear reference to the diversification of the facilities and the widest range of users which will underpin the reduction of seasonality and broadening of market appeal
- It provides reference to identified needs, setting out the requirement for researched foundation for the proposals
- It features general accessibility and sustainability in its criteria as reference to accessible visitor accommodation should apply across serviced and non-serviced formats, including accessible cottages, cabins, lodges, glamping units and group accommodation.
- It uses the text to explain the rationale and evidence behind the policy which in itself helps to give clarity to the market.

2.5.3 It could be strengthened through:

- Referencing the research and recommendations of this study as part of the evidence base

- Using the text to provide a steer to the market by featuring the types of accommodation for which market potential has been identified which provides an element of control over the form style and type of accommodation proposed which would be in line with the findings of the research
- Mentioning year-round ambitions and sympathetic consideration of conditions that restrict opening and occupancy where appropriate taking into account localised matters such as ecological, landscape or amenity impacts.
- Ensuring the use of "visitor" accommodation to allow broad visitor markets to be included
- Including specific reference to accessible visitor accommodation as a standard requirement across all accommodation
- Dealing with concerns about permanent residential use with a letting for visitor purposes only condition/legal agreement and keeping a register of guests
- Considering staff accommodation where appropriate evidence of need is provided, taking into account matters such as operational need and controls or conditions to prevent unrestricted residential occupation
- Being aware that phrases such as 'well-related to' can be open to debate and cause issues of interpretation at appeal (EMP4b) and incorporating physical (i.e. located within, adjacent to, visually cohesive) and functional (i.e. operationally necessary, demonstrably required to serve the operation, directly support the operation) terminology for greater robustness
- Making provision under retention policy for proportionate independent verification of the case for change of use to be at the cost of the applicant
- Tying in language around sustainable credentials to accommodation design and development across all facets of a project such as BREEAM (or alternative) standards, renewable materials, utilities, energy, reuse of existing buildings over new where possible, connecting with sustainable forms of transports following arrival.

2.5.4 Sevenoaks is highly constrained by **Green Belt**, while many visitor economy assets and accommodation opportunities are rural, estate, heritage or landscape based. This creates a clear policy challenge: visitor accommodation may be most appropriate in locations where development is most constrained. Proposals are judged against national Green Belt tests in the Framework, which the Council cannot relax or override; local policy can only operate within the space national policy allows. Examination of tourism and visitor accommodation policies in Green Belt areas – including some where major development has been permitted - shows that visitor accommodation has been delivered in Green Belt and sensitive rural locations where proposals are location specific, well evidenced, carefully designed and linked to clear visitor economy or public benefits. It also shows that other authorities use policy to provide controlled support for rural tourism, visitor accommodation, existing attractions and estate diversification.

2.5.5 The appropriate approach for Sevenoaks is therefore selective and criteria based. Policy should provide a route for exceptional, high quality and well justified proposals, while resisting speculative or harmful development.

- Sevenoaks should adopt a positive but controlled policy approach for visitor accommodation in Green Belt and rural locations. Support should focus on proposals that are clearly location specific, well evidenced, proportionate in scale and directly related to an existing visitor economy or rural asset, such as an established attraction, hotel, estate, heritage asset, rural business or outdoor recreation use.
- Any policy should require applicants to address Green Belt openness, visual and spatial impact, landscape character and Green Belt purposes. It should also require landscape led design, with scale, siting, layout, materials, lighting and infrastructure shaped by landscape capacity and the need to protect the qualities that attract visitors.
- The policy should recognise that different accommodation types raise different planning issues. Hotels, lodges, cabins, glamping, estate accommodation and attraction linked accommodation should not be assessed through a single generic lens. Where accommodation forms part of a landed estate or large rural holding, a Whole Estate Plan or equivalent strategy should be encouraged.
- Where proposals are supported, conditions or legal agreements should secure holiday use, prevent permanent residential occupation, deliver landscape and biodiversity mitigation, manage lighting and control long term operation.

2.5.6 A new emerging Local Plan and spatial strategy presents an opportunity to address these omissions and sharpen the approach to deliver a positive and facilitating framework for hotel and visitor accommodation development to enable the growth of the wider visitor economy embedded in wider policy and destination aspiration and all the benefits this can bring.

2.6 THE CLIMATE FOR INVESTMENT

2.6.1 The **climate for investment** in the hotel and visitor accommodation sector is a challenging one. The sector is under pressure from rising construction costs, increased operating costs reducing margins, and the availability and cost of finance. There has been a renewed focus on existing assets as a result, to convert and re-brand. Plus the prioritisation of triple A sites – major regional cities – Manchester, Liverpool, Newcastle, Bristol et al - and premium markets such as Edinburgh, Cambridge and Bath - over secondary and tertiary locations. But there remains interest from landowners, local authorities developers and operators, recognising the value these developments can bring, subject to unlocking delivery. Much development is opportunistic providing scope to influence decision-making if incentives, and particularly funding, are in place.

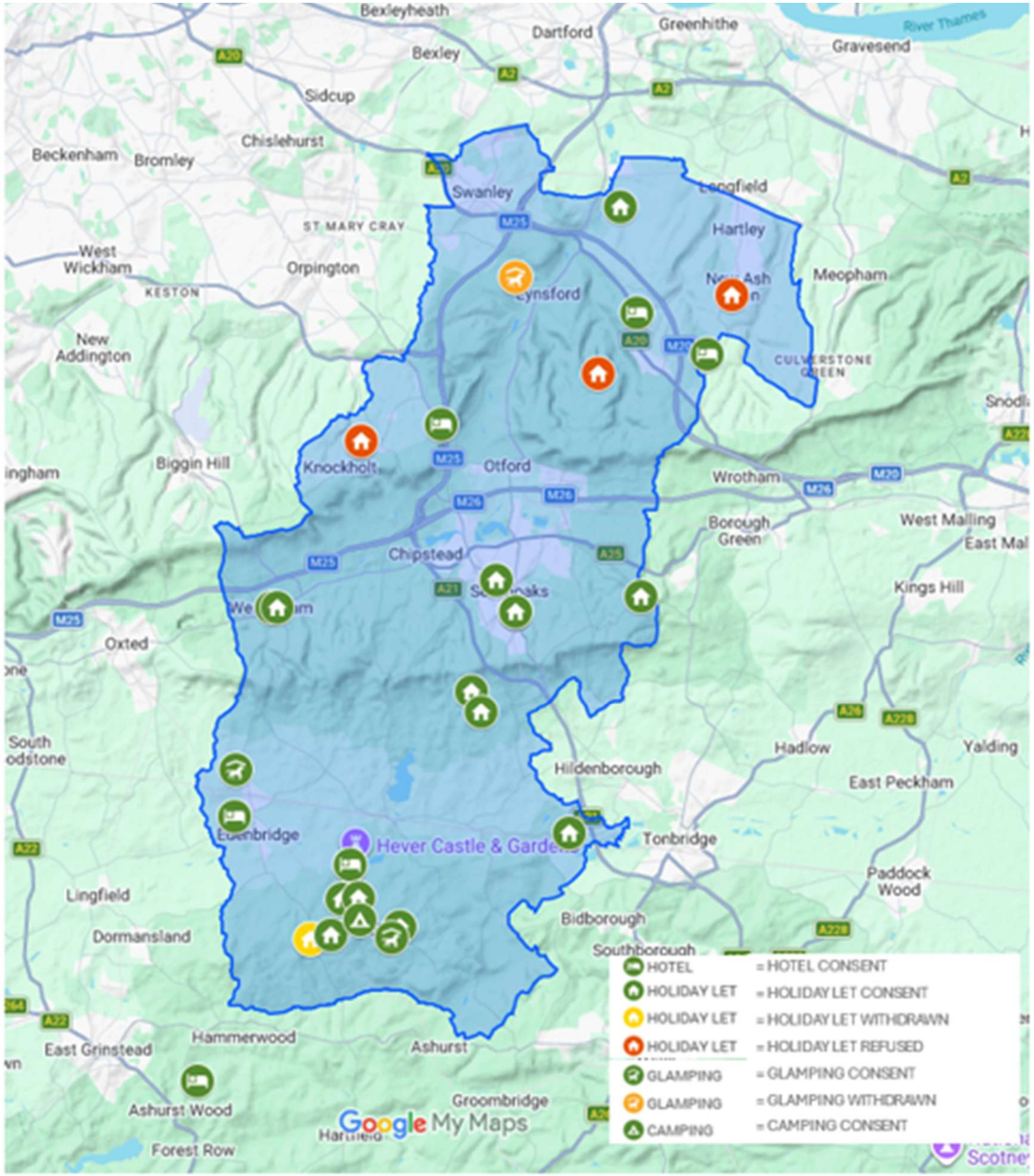
2.7 HOTEL & VISITOR ACCOMMODATION DEVELOPMENT PROPOSALS

2.7.1 **Development proposals for hotels and other forms of visitor accommodation** are an indication of developer, investor and operator intent, even should they not progress through to, or beyond, planning.

2.7.2 A review of planning records for the period 2019-2025 found just over 30 schemes coming forward in Sevenoaks district over that period – 10 hotel related, 17 holiday lets and the rest for glamping/camping. These are mostly low key in terms of their scale and impact. This aligns with current planning policy – and is to some degree shaped by it. The key exception to this is the London Golf resort scheme which was granted permission in 2024.

2.7.3 There have also been some notable losses, including the Royal Oak in Sevenoaks, and beyond this timeframe the Moorings and the Hever Hotel, despite having a retention policy in place. An average of 5 applications a year for small scale development might support gradual growth and an element of diversification for farms, pubs, attractions or wedding venues, but if left to its own devices will not drive the sort of uplift in overnight stays set out in the Council's ambitions and is unlikely to deliver the diversity and range of offer to grow and attract new markets.

Table 13 GEOGRAPHIC DISTRIBUTION OF PLANNING PROPOSALS 2019-25 BY TYPE AND OUTCOME



2.8 SOFT MARKET TESTING

2.8.1 **Testing developer, investor and operator interest** in Sevenoaks is a good way to gain a live perspective on the area as an investment location for hotels and other forms of visitor accommodation and is a measure of market potential as well as a means to warm up interest for follow up post-study. **37 developer, operators** and **investors** were approached, and **interest was received from 27**, with **11 hotel developers/brand owners** and **16 non-serviced offerings**. Several were interested in multiple locations across the Sevenoaks District.

2.8.2 There was interest in hotels at a range of levels from economy and mid-scale brands through to boutique and destination hotels, as well as in pub accommodation including premium pub offerings. Given the current climate for investment and the viability challenges around ground-up hotel development, interest from the main brands was predominantly for franchise and management agreements and for larger hotels, with a focus on Sevenoaks and the Swanley/M25/M20/M26/Brands Hatch area to the north of the district. There was some interest in smaller scale boutique hotel and inn development in the market towns that is better suited to the scale of the destination and market. Much of this would be opportunistic and dependent on a property becoming available to acquire or re-brand, or for a development opportunity that would be led/supported by public sector investment.

2.8.3 In terms of non-serviced accommodation, there was interest from 16 providers (developers, operators, investors and manufacturer partners), from a few units added onto an attraction, farm or hotel, (e.g. Featherdown) to large scale holiday parks (Huttopia) and caravan and camping (Caravan and Motorhome Club). Also, there was interest in off-grid and sustainable accommodation including the trio of similar brands Unplugged, Unyoked and Shacks, as well as interest in motorhome Aires via Campra. In other studies, they have been most attracted by the opportunity to create new or enhance existing tourist Routes. There are some well-known names amongst the interested parties with significant brand appeal and marketing clout; but also, some relatively new entrants to the market that could offer a point of difference.

2.8.4 Key barriers to investment across the piece were the availability of funding and viability challenges given high development costs, plus the need for a supportive local planning framework, the latter particularly for developments requiring a location outside the urban/built up area, and acknowledgement of the particular constraints in this location relating to Green Belt.

2.8.5 The sample and response to the market testing is summarised in the table below.

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Table 14 SEVENOAKS DISTRICT SOFT MARKET TESTING RESPONSE

COMPANY	RESPONSE	INTEREST	COMPANY	RESPONSE	INTEREST
NATIONAL HOTELS & PUB ACCOMMODATION			NON-SERVICED ACCOMMODATION		
Accor	Y	Y	Architects Holiday	Y	Y
Bespoke	Y	Y	Campra	Y	Y
Bike & Boot	Y	N	Camping & Caravanning Club	Y	Y
Dalata	Y	N	Caravan & Motorhome Club	Y	Y
Hilton	Y	Y	Darwin Alternatives	N	N
Hyatt	Y	Y	Featherdown	Y	Y
IHG	Y	Y	Forest Holidays	Y	N
Inn Collection Group	Y	Y	Huttopia	**Y**	Y
KALM	Y	Y	Landal Green Parks	N	
Legacy Hotels	Y	N	Nokken	N	
Marriott	Y	Y	Nook & Key Escapes	Y	Y
Mollies Diner	Y	N	Numa	N	
Premier Inn	Y	N	OOD House	Y	Y
Radisson	Y	Y	RIX OMNI	Y	Y
Travelodge	N	Y	Raus	Y	Y
Village	Y	Y	Shacks	Y	Y
			Unplugged	Y	Y
			Unyoked	Y	Y
			Wanderlust Camping	Y	Y
			Wild With Consent	Y	Y
			Wildhive Retreats	Y	Y
Total approached/responded Y	**16/15**	**11**	**Total approached/responded Y**	**21/17**	**16**

3. THE OPPORTUNITY

3.1 POSITIONING THE SEVENOAKS DISTRICT HOTEL & VISITOR ACCOMMODATION STRATEGY

3.1.1 In articulating the opportunity, the rationale uderpinning the strategy for accommodation development should incorporate the following thinking:

- Why more accommodation is needed
- What type of accommodation is needed and where
- Who the accommodation is being developed for
- How much accommodation is needed
- How might it be delivered

Why?

3.1.2 The starting point for developing an approach to hotel and visitor accommodation development across Sevenoaks District is the Council's policy position on the visitor economy and the role that visitor accommodation plays in that.

3.1.3 The aspirations for Sevenoaks and the visitor economy are articulated in the Kent Destination Management Plan 2024-2029, the Kent County Accommodation Review (2020), and the Sevenoaks Economic Development Strategy 2022-2027. These seek to:

- In county strategy:
  - Increase overnight stays
  - Attract investment to increase the supply of quality accommodation stock
  - Respond to trends in product development such as sustainable, wellness, dog-friendly, accessible
  - Sees a lack of accommodation in Sevenoaks as restricting the growth of the visitor economy
  - Identifies gaps in the accommodation offer for Sevenoaks in terms of boutique style rural accommodation offering a special quality overnight experience and another large branded hotel close to key access routes
- In District strategy:
  - Visitor economy is one of four focus areas

- The need for a more diverse and niche tourism offer to respond to growth in the staycation market and appeal of the natural environment, health and well-being
- A priority to increase accommodation provision
- Encourage rural diversification including tourism uses
- Encourage tourism uses to support town centre vitality and the evening economy.

3.1.4 In summary, strategy and policy for Sevenoaks is supportive of the growth of the visitor economy, particularly overnight stays, and of the need for and ambition to increase accommodation provision. To grow the visitor economy sustainably – more visitors, staying longer, spending more – requires more overnight accommodation given capacity issues at peak periods, and the need for new accommodation products to attract new markets, that also appeal to markets that can travel outside peak times.

3.1.5 The Local Plan should provide a spatial expression of these ambitions, and presents an opportunity to translate them into a framework to facilitate the delivery of more accommodation of the type for which market potential has been identified. This strategy background provides 'hooks' on which to hang a case for planning permission, particularly in challenge situations such as Green Belt.

3.1.6 The above sets out why additional accommodation is needed and the strategic direction for future provision. The following section defines the opportunity in terms of market, type, location, scale and options for delivery.

What Type & Where?

3.1.7 In terms of what type of accommodation there is market potential for and where the identified hotel and visitor accommodation development opportunities might be delivered, the study has identified potential for a wide range of products that have a variety of locational and site requirements dependent upon the accommodation type and the markets being served. In addition to the sustainability thread, targeting hotel and visitor accommodation products that can bring additional benefits is key. Examples include hotel (and other) brands that have a following and will bring a market with them; experiential offers that provide a reason to visit as well as facilities geared up to that activity or special interest; destination hotel and visitor accommodation products that in their buildings, settings, facilities and service offering become an 'attractor' in their own right; accommodation products that are suited to markets that will visit out of season or may be linked to an out of season attractor e.g. *dark skies.*

3.1.8 Locational and site priorities are summarised below by accommodation type.

SEVENOAKS DISTRICT - LOCATION & SITE REQUIREMENTS BY ACCOMMODATION TYPE					
	LOCATION/SETTING				
TYPE OF ACCOMMODATION	**SWANLEY & M25/M26/M20 CORRIDORS**	**SEVENOAKS & MARKET TOWNS**	**RURAL AREA**	**TYPE OF SITE**	**SIZE, SITE, DEAL SITE REQUIREMENTS**
SERVICED ACCOMMODATION					
Branded, Full Service Hotels (& Conferencing)	✓			2 acre+ sites or could be incorporated into a larger development Motorway corridors attractive for accessibility/catchment. Could be linked to sports facility – stadium, golf Supporting use on business parks	120-150 rooms Sports Arc Swanley Ground up development & ownership or management contract
Budget Hotels	✓	✓		1-2 acre sites where free-standing on edge of town and routeways Smaller central sites often as part of mixed use schemes Upper floor uses for retail and restaurant Supporting uses on business parks	50-100 rooms Sevenoaks Swanley Lease option makes it attractive to developers and investors
Boutique & Lifestyle Hotels	✓	✓	✓	Conversion of characterful properties	20-70 rooms Quality bedroom accommodation and fine dining Freehold acquisition or management
Destination/Country House & Deconstructed Hotels		✓	✓	Country houses and estates Rural schools and offices for conversion	40-100+ rooms Non-serviced lodges, treehouses, cabins, glamping in addition; Opportunistic acquisitions of country houses and estates or extension of facilities such as wedding venues, golf.
Pub Accommodation/ Gastropubs	✓	✓	✓	Utilisation of upper floors or pubs, conversion of outbuildings and development of units on surrounding land. Rural and urban settings From budget lodge style accommodation to gastropubs with boutique bedrooms	Typically 4-10 rooms Lodge style 30 + rooms Coaching Inns 30-60 rooms Acquisition and diversification opportunities.
Restaurants with Rooms	✓	✓	✓	Serviced rooms supporting an F&B/events venue Utilisation of upper floors, conversion of outbuildings, acquisition of nearby properties in more urban settings, pods or lodges in more rural settings with land.	Typically 3-10 rooms Opportunistic conversions, expansions and acquisitions

Wedding Venues			✓	Serviced rooms supporting an F&B/events venue	Could include some non-serviced accommodation in the grounds – glamping, lodges, cabins
Guest Houses/B&Bs	✓	✓	✓	More informal rooms offering, can range in quality to include luxury and boutique	Opportunistic Tend to be lifestyle businesses
NON-SERVICED ACCOMMODATION					
Holiday Lodges & Parks			✓	Strategic site/s needed for a larger scale development	50 – 200 lodges Onsite amenities for self-contained offer Rural setting with good access Ideally acquire existing site or site with consent
Eco-lodges, cabins and pods – including off-grid			✓	Additions to attractions, pubs and facilities, golf, fishing and equestrian sites, hotels with grounds and wedding venues Farm diversification, Country Parks, Woodlands, Reservoirs Off grid include more remote locations	10- 30 units, 10-30 acres Possibly with selective amenities to match the offering Freehold acquisition or management agreements
Niche lodges, cabins and pods – specific activities such as stargazing, cycling, mountain biking etc			✓	As above with particular focus on Dark Sky areas, National Landscapes, cycle routes. Dark sky compliant locations typically away from built up areas of towns or large villages	1-10 units on smaller sites Star gazing requiring dark skies Bike / activity pods/cabins close to trails and footpath network Lease or acquire sites/structures to convert.
Glamping (pods, yurts, bell tents, quirky e.g. silo conversions, treehouses, champing (churches)			✓	Additions to attractions, pubs and facilities, golf, fishing and equestrian sites, Farm diversification, Country Parks, Woodlands, Reservoirs, Wedding venues	1-10 units on smaller sites quirky and wow units will be opportunistic so not easy to determine locations. Lease or acquire locations to convert.
Champing **(camping in churches)**		✓	✓	Temporary use of churches for overnight 'camping'	Pilgrimage locations/along trails Opportunistic
Camping & Caravanning Sites	✓	✓	✓	Expand existing sites Create new sites as above May include some glamping units/cabins Stop-over sites along major routeways/Motorways Sites with attractions. Woodlands, Country Parks	50 – 100 pitches Rural, accessible, with amenities. Edge of towns Possible to lease or acquire freehold sites. Smaller sites also as appropriate to the location and site specifics.
Self-catering cottages & complexes		✓	✓	Convert, up-grade & extend farm/rural buildings including those in market towns and villages,	5-25 units With and without facilities/leisure Semi-rural, rural settings Site acquisition or lease pre planning or partnership with landowners

Supercottages	✓	✓	✓	Properties for exclusive use of large groups of friends and family Convert and extend existing buildings and potential to convert character buildings in the urban areas	1-2 units Conversion means the acquisitions will be opportunistic but semi/rural settings. Acquisition and redevelopment or management of existing
Apartments/Complexes	✓	✓	✓	Potential to convert in rural and urban settings, including market towns e.g. banks and Council buildings especially of character	1-10 units Opportunistic conversions/acquisitions
Accessible self-catering cottages, cabins and lodges	✓	✓	✓	Fully accessible units – a dedicated complex or a small number of units in a wider complex. Access by vehicle required. Cottages and properties within or close to towns and urban settings can provide greater accessibility	5 – 20 units Semi-rural- connectivity is key Site acquisition or lease due to specific requirements of the developers. Opportunistic conversions
Motorhome Aires	✓	✓	✓	Stopovers with or without facilities for water, waste and electric hook up. Council car parks & park & rides Attraction & facilities car parks (country parks, pubs), farms	5 – 20 spaces A variety of locations and settings where there is hard standing Minimal capital requirement with marketing in conjunction with Campra. Could be tested initially through managed pilot scheme with controls over length of stay and camping behaviours
Boutique Hostel	✓	✓	✓	Contemporary design and facilities. Cycling/walking/activity related Could be adjacent to an existing facility	Conversion or new development c. 20 bedrooms Acquisition of existing building to convert in semi-rural setting to combine outdoor enthusiasts with possible suburban guests.
Well-being Retreats			✓	Destination site to create get away from it all and immersive experience. Woodlands and water.	5-20 units Semi-rural settings, conversion of existing buildings or use of modern cabins and pods. Landed estates with large acreage. Site lease or acquisition.
Resorts – holiday lodges, eco-lodges, glamping – at scale			✓	Large estates Brownfield sites Disused quarries	20 – 50 units Large sites 50 acres Typically site acquisition but may also look for lease depending on business model.

Who For?

3.1.9 The target market profile has been adapted from national frameworks using published Sevenoaks and Kent visitor economy evidence, including Visit Sevenoaks, Visit Kent, the Kent Destination Management Plan, tourism economic impact data and relevant destination strategy material.

3.1.10 The review identified which markets remain transferable, where they require local adjustment, and where Sevenoaks-specific audiences should be added, particularly London-linked short breakers, green spacers, families, hyper-local residents, accessible visitors, events audiences and international "London-plus" touring markets.

TARGET MARKET & THEMES	CHARACTERISTICS & INTERESTS	ACCOMMODATION PREFERENCES	ACCOMMODATION POTENTIAL	DEMAND/SUPPLY EVIDENCE	DEVELOPER / OPERATOR APPETITE	POTENTIAL LOCATIONS
Active Explorers / Green Spacers	Couples, small groups, older visitors and London / South East residents seeking countryside, walking, cycling, gardens, nature reserves, rail trails and low-effort outdoor breaks. Strong overlap with Visit Kent's "green spacers" and active/outdoors audiences.	Good-quality inns, pubs with rooms, B&Bs, self-catering, cabins and small-scale rural accommodation with walking information, boot storage, bike storage, drying space, EV charging and public transport information.	Trail-side cabins and lodges. Quality pubs with rooms. Boutique B&Bs. Small glamping/cabin clusters. Accommodation linked to walking trails, gardens, country parks and rail trails.	West Kent's strengths are identified as food and drink, walking, historic villages, countryside, heritage and wellbeing. Kent visitors are strongly inspired by active/outdoors, food and drink and heritage, while Sevenoaks is promoted around landscapes, historic houses, gardens, villages and short breaks from London. (visitkentbusiness.co.uk)	Likely interest from pub operators, farm and estate diversification, small cabin/glamping operators, independent accommodation owners and attractions looking to extend dwell time.	Sevenoaks / Knole fringe, Darent Valley, Shoreham, Otford, Eynsford, Lullingstone, Eden Valley, Westerham, Toys Hill, Ide Hill, High Weald fringe, North Downs and rail-connected villages.
Cultural Explorers / Heritage Seekers	Visitors motivated by historic houses, castles, gardens, literary associations, Churchill heritage, Tudor history, Roman remains, churches, galleries, local makers, independent	Boutique hotels, character inns, restaurants with rooms, heritage conversions, quality B&Bs, guesthouses, stylish self-catering and town-centre accommodation	Boutique hotels. Historic inns. Restaurants with rooms. Country house hotels. High-quality self-catering in converted buildings. Deconstructed hotel concepts using estate or heritage buildings.	Visit Kent highlights Knole, Chartwell, Quebec House, Emmetts Garden, Hever Castle, Penshurst Place, Chiddingstone Castle, Lullingstone Roman Villa and Lullingstone Castle as core Sevenoaks-area assets. Visit Sevenoaks also foregrounds historic	Strongest appetite likely from independent hotel operators, pub/inn operators, heritage property owners, estates, restaurant-led businesses and premium self-catering operators.	Sevenoaks town, Westerham, Edenbridge, Eynsford, Shoreham, Otford, Chiddingstone, Penshurst fringe, Hever / Eden Valley, Lullingstone / Darent Valley, Knole /

	retail and traditional Kent villages.	close to food, retail and heritage assets.		houses, gardens, festivals, local food and short breaks from London. (visitkent.co.uk)		Chartwell / Emmetts / Riverhill clusters.
Curious Families	Families with children, including intergenerational groups and single-parent families, seeking easy days out, castles, gardens, wildlife, Roman history, outdoor space, family activities and safe countryside breaks close to London.	Family rooms, lodges, cabins, glamping, farm stays, self-catering cottages, holiday barns, family-friendly inns and accommodation linked to attractions. Needs parking, outdoor play, simple food options and dog-friendly provision.	Family lodges and cabins. Themed glamping. Farm-based stays. Attraction-linked accommodation. Family-friendly pub rooms. Holiday barns and grouped self-catering.	Visit Kent identifies families as a core audience, including changing family structures and intergenerational members. Sevenoaks' attraction base includes Hever Castle, Penshurst Place, Chiddingstone Castle, Lullingstone Roman Villa, Lullingstone Castle, Sevenoaks Wildlife Reserve and Brands Hatch. (visitkentbusiness.co.uk)	Good appetite from attractions, farm and estate diversification, glamping/cabin operators, wedding/event venues and family-oriented self-catering operators.	Edenbridge / Hever, Penshurst / Chiddingstone, Eynsford / Lullingstone, Sevenoaks Wildlife Reserve, Brands Hatch / West Kingsdown, rural sites near family attractions and villages with food provision.
Social Contemporary Seekers / Higher-Value Adult Short Breakers	Predominantly millennial couples and small friendship groups, pre-children or with very young children, seeking stylish, bookable, short breaks with food, drink, gardens, heritage, events, wellness, independent shopping and memorable accommodation.	Boutique hotels, lifestyle inns, premium self-catering, design-led cabins, high-quality pubs with rooms, restaurants with rooms, spa/wellness stays and premium glamping.	Boutique/lifestyle hotels. Premium cabins. Restaurants with rooms. Vineyard / food-linked stays. High-quality self-catering. Small spa or retreat accommodation.	Visit Kent defines "social contemporary seekers" as a key audience driven by unique experiences and interested in history, heritage, active/outdoors and countryside. The DMP also notes that accommodation is a major decision factor for Kent breaks, with 30% ranking it first. (visitkentbusiness.co.uk)	Strong potential from boutique/lifestyle operators, premium cabin/glamping developers, inns, restaurants, estate owners and high-quality short-let operators.	Sevenoaks town, Westerham, Edenbridge, villages with strong food/drink offer, vineyards and local producer locations, Knole / Chartwell / Hever / Penshurst clusters, accessible countryside within easy reach of London.
Country-Loving Traditionalists / Older Couples	Older couples and empty nesters seeking gardens, historic houses, traditional villages, countryside,	Comfortable hotels, country house hotels, traditional inns, B&Bs, guesthouses, self-catering cottages,	Country house hotels. Pub accommodation. Quality B&Bs. Accessible cottages. Restaurants	Visit Kent identifies older couples as an audience interested in the outdoors and traditional or cultural experiences. Sevenoaks is	Appetite likely from existing hotels, inn operators, B&B owners, country estate owners and	Sevenoaks, Westerham, Edenbridge, Eynsford, Otford, Shoreham, Chiddingstone, Penshurst fringe, Ide Hill

	National Trust properties, gentle walks, good pubs, quality retail and comfortable short breaks.	accessible rooms and high-quality pubs with rooms.	with rooms. Small-scale estate accommodation.	especially well matched through Knole, Chartwell, Quebec House, Emmetts Garden, Riverhill, Lullingstone, Hever, Penshurst and historic villages. (visitkentbusiness.co.uk)	quality self-catering businesses.	/ Toys Hill, Darent Valley and High Weald fringe.
Wellness, Restorative and Slow Travel Visitors	Visitors looking for quiet, nature, gardens, sleep, walking, retreat time, good food, gentle activity and respite from London / urban life. Overlaps with green spacers, older couples and higher-value short breakers.	Peaceful rural accommodation, cabins, retreats, country houses, spa-style hotels, barns, eco-lodges, off-grid stays and high-quality self-catering with strong landscape connection.	Wellness retreats. Nature cabins. Sleep-focused accommodation. Yoga / retreat venues. Eco-lodges. Estate retreats. Small spa accommodation.	West Kent is identified in the Kent DMP as having strengths in countryside, heritage and wellbeing, while Sevenoaks' own positioning emphasises landscapes, gardens, villages and its proximity to London for short breaks. (visitkentbusiness.co.uk)	Appetite likely from estate owners, farm diversification, boutique hotel operators, retreat businesses and premium cabin/lodge developers. Planning and Green Belt sensitivity will be important.	High Weald fringe, Eden Valley, Darent Valley, Toys Hill / Ide Hill, Westerham countryside, estate settings, woodland locations and sites near gardens or walking routes.
Food, Drink and Agritourism Visitors	Visitors motivated by Kentish produce, pubs, restaurants, independent cafés, farm shops, markets, vineyards, breweries, food trails and "Garden of England" identity. Often overlaps with adult short breaks and cultural visitors.	Restaurants with rooms, inns, boutique hotels, vineyard/farm stays, food-led self-catering, premium glamping and accommodation packaged with local producers.	Restaurants with rooms. Vineyard stays. Pub accommodation. Farm stays. Food-led glamping. Boutique inns. Self-catering linked to food trails.	Visit Sevenoaks promotes "unique food", independent cafés and restaurants, local producers, farmers markets and a food and drink trail. The Kent DMP identifies food and drink as a West Kent strength and one of Kent's most inspiring visitor themes. (Visit Sevenoaks)	Likely appetite from pubs, restaurants, vineyards, farm shops, estates, local producers and boutique accommodation operators.	Sevenoaks town, Westerham, Edenbridge, Otford, Shoreham, Eynsford, villages with strong pub / restaurant offer, vineyards and farm-shop locations, food trail nodes.
Festival, Events, Motorsport and Cultural Audiences	Visitors attending festivals, castle events, garden events, theatre/cinema, arts, music, seasonal programming,	Short-stay hotels, inns, guesthouses, self-catering, glamping, event-linked accommodation, group accommodation	Event-linked accommodation. Boutique hotels. Pubs with rooms. Temporary glamping. Group self-catering. Serviced apartments. Packages	Visit Sevenoaks references festivals in fields and castles, The Stag Sevenoaks, and Brands Hatch; Visit Kent also identifies events, festivals and unique experiences	Appetite likely from existing hotels, inns, self-catering operators, event venues, temporary glamping operators and attractions	Brands Hatch / West Kingsdown, Sevenoaks town / The Stag, Hever, Penshurst, Chiddingstone, Lullingstone, Westerham / Chartwell,

	motorsport at Brands Hatch, weddings and special events. Includes couples, families, groups, performers and event staff.	and overflow provision close to venues or transport corridors.	with venues and attractions.	as motivating for some inbound and domestic audiences. (Visit Sevenoaks)	looking to increase yield from events.	Edenbridge, Knole and estate/event venues.
Hyper-Local Residents, VFR and Local Ambassadors	Kent and Sevenoaks residents, visiting friends and relatives, people hosting guests, residents exploring locally, and those taking short breaks within the county. Important for day trips, repeat visitation and overnight stays generated by family occasions.	Value-conscious but good-quality accommodation: pubs with rooms, B&Bs, town-centre hotels, self-catering, family rooms, accessible rooms and accommodation close to homes, venues and transport.	Budget/mid-market hotels. Pubs with rooms. Guesthouses. Self-catering. Wedding venue accommodation. Motorhome / touring stopovers where appropriate.	Kent's DMP identifies hyper-local residents as a key audience and notes that VFR accounted for 40% of visits in 2022; 19% of Kent residents had stayed overnight elsewhere in the county for leisure in the previous year. Sevenoaks' 2023 tourism profile records 205,100 staying trips and 667,000 staying nights, but day trips dominate at 4.1m. (visitkentbusiness.co.uk)	Appetite from pub operators, small hotels, B&Bs, self-catering operators, wedding venues and property owners close to towns and villages.	Sevenoaks, Swanley, Edenbridge, Westerham, Otford, Eynsford, villages around wedding/event venues, edge-of-town locations with parking and rail access.
Business, Contractors and Midweek Corporate Demand	Midweek demand from local business, meetings, training, contractors, events, motorsport, education, public sector, London-linked business travel and small corporate retreats.	Budget to mid-market hotels, serviced apartments, pubs with rooms, aparthotel-style accommodation, long-stay rooms and accommodation with parking, Wi-Fi, breakfast and evening food.	Budget hotels. Mid-market hotels. Serviced apartments. Pub accommodation. Aparthotel-style provision. Small corporate retreat venues.	Visit Kent identifies MICE agents, destination management companies and business travel as secondary markets. Sevenoaks District's Economic Development Strategy prioritises regeneration of market towns and enhancement of the visitor and rural economies, alongside better use of employment sites. (visitkentbusiness.co.uk)	Appetite likely from branded budget/mid-market operators in stronger locations, pub accommodation operators, serviced apartment providers and venue-led accommodation operators.	Sevenoaks town, Swanley, Brands Hatch / West Kingsdown, M25/A25/A21 corridors, business parks, edge-of-town sites, rail-connected centres and employment locations.
International Visitors, Travel	Overseas visitors and small-group tours	Serviced accommodation,	Boutique hotels. Small hotels. Quality inns.	Kent's DMP identifies France, Germany and the	Appetite likely from existing hotels,	Sevenoaks / Knole, Westerham / Chartwell

Trade and Small Group Touring	interested in English heritage, castles, Churchill, Anne Boleyn, gardens, traditional villages, countryside, literary associations and London-plus itineraries. Key Kent inbound markets include France, Germany, USA and Spain.	boutique hotels, country house hotels, quality inns, guesthouses and accommodation suitable for small groups with clear online booking and itinerary support.	Country house hotels. Premium guesthouses. Group-friendly accommodation.	USA as top inbound markets, with Spain as a growth market; heritage, active/outdoors, countryside and unique experiences are all relevant motivators. Sevenoaks' heritage and garden offer is especially strong for London-plus touring. (visitkentbusiness.co.uk)	heritage properties, quality inns, tour operators and attractions with packaged itineraries.	/ Quebec House, Hever, Penshurst, Chiddingstone, Lullingstone, Eynsford, Otford, Darent Valley, rail-connected bases for London-plus itineraries.
Accessible Tourism Market	Disabled visitors, older visitors, carers, families and groups requiring reliable access information, step-free rooms, adapted bathrooms, clear parking, accessible attractions and confidence before booking.	Fully accessible hotel rooms, adapted cottages, accessible lodges/cabins, ground-floor pub rooms, wet rooms, sensory-aware information and clear access statements.	Accessible self-catering. Accessible lodges and cabins. Ground-floor pub rooms. Accessible hotel stock. Accommodation close to accessible towns, gardens and attractions.	Kent's DMP highlights the growing importance of the Purple Pound, the ageing population and the need to prioritise visitors with accessibility needs. Visit Kent also includes accessible Kent information within its visitor navigation. (visitkentbusiness.co.uk)	Appetite may be strongest from quality self-catering operators, lodge/cabin developers, hotels upgrading existing stock, public/third-sector partnerships and attractions improving inclusive access.	Sevenoaks town, Westerham, Edenbridge, Otford, Eynsford, accessible garden/heritage attractions, sites with level access, parking and proximity to food and visitor facilities.
Nature, Gardens and Wildlife Visitors	Garden lovers, wildlife watchers, photographers, walkers, older couples, families and special-interest visitors drawn by bluebells, gardens, deer parks, nature reserves, rivers, hills and designed landscapes.	Rural self-catering, B&Bs, inns, cabins, garden-linked accommodation, eco-lodges and small retreats with nature interpretation, outdoor space and low-impact design.	Garden-linked stays. Eco-cabins. Rural retreats. Small glamping clusters. Self-catering near reserves and gardens. Estate accommodation.	Sevenoaks' promoted assets include Knole Park, Emmetts Garden, Riverhill Himalayan Gardens, Lullingstone World Garden, Sevenoaks Wildlife Reserve, Darent Valley, Eden Valley and the High Weald / North Downs landscapes. Kent's Sustainable Tourism Action Plan prioritises nature-positive tourism	Appetite likely from estates, gardens, farms, attractions, cabin/glamping operators and nature-based accommodation providers.	Knole / Sevenoaks, Riverhill / Ide Hill, Emmetts / Toys Hill, Lullingstone / Eynsford, Darent Valley, Sevenoaks Wildlife Reserve, Eden Valley, High Weald fringe and estate/woodland sites.

				and low-carbon / active travel. (visitkent.co.uk)		
Group Travel, Reunions and Multi-Generational Stays	Extended families, friend groups, celebration groups, garden/heritage groups, walking groups, corporate retreats and special-interest clubs seeking shared space and high-quality settings.	Large self-catering houses, barns, grouped cottages, exclusive-use inns, country houses, retreat venues, small lodge clusters and glamping groups with communal dining and parking.	Super-cottages. Exclusive-use houses. Barn conversions. Retreat centres. Group glamping. Estate accommodation. Pub/hotel exclusive hire.	The Kent DMP identifies multi-generational travel as a growing trend and includes group travel / tour operators within secondary market activity. Sevenoaks' estates, heritage houses, villages and countryside are a strong fit for higher-value group stays, provided amenity impacts are managed. (visitkentbusiness.co.uk)	Appetite from estate owners, self-catering operators, wedding/event venues, farm diversification projects, retreat operators and some pub/hotel owners.	Rural estates, farmsteads, Hever / Eden Valley, Penshurst / Chiddingstone, Westerham countryside, Darent Valley villages, High Weald fringe and sites close to walks, gardens, pubs and events.
Motorhome, Touring and Low-Impact Touring Visitors	Touring couples, older visitors and active travellers seeking flexible stopovers, villages, pubs, food, walking, gardens and access to Kent / London fringe routes. This is not a primary Sevenoaks target market, but it is a relevant supplementary market if well managed.	Motorhome aires, pub stopovers, small touring sites, farm stopovers and attraction-linked overnight parking with water, waste, rules, safe access and spending opportunities nearby.	Motorhome aires. Pub stopovers. Farm stopovers. Small touring pitches. Attraction-linked stopovers.	The Sevenoaks visitor economy is heavily day-visitor led, with 4.1m day trips compared with 205,100 staying trips in 2023, which suggests some scope to convert touring and day visitors into modest overnight spend where locations are appropriate.	Appetite likely from pubs, farms, attractions, private car parks and specialist aire providers, subject to highways, landscape and Green Belt constraints.	Market town edges, pubs, farm shops, Brands Hatch area, Edenbridge / Westerham / Otford / Eynsford, attraction car parks where suitable, and rural sites close to trails and food/drink nodes.

3.1.11 A number of cross-cutting themes apply across all target markets and should inform the future planning, development and marketing of visitor accommodation in Sevenoaks District. These include the need for **high-quality and digitally bookable accommodation**, stronger **links between places to stay and local food**, **heritage**, **gardens**, **walking and events**, and improved **provision for visitors with access requirements**. **Sustainability** is also central, particularly given the district's Green Belt, landscape and heritage sensitivities, meaning new accommodation should generally be low-impact, well-designed, energy-efficient and capable of supporting local spend without undermining local character. **Pet-friendly** provision, **EV charging**, **active travel information**, **public transport connectivity**, secure cycle storage, clear access statements and flexible short-break booking are increasingly important baseline requirements rather than niche enhancements. Across all markets, the strongest opportunity is therefore for accommodation that is distinctive, place-led and operationally aligned with Sevenoaks' countryside, heritage, food and short-break appeal.

How Much?

3.1.12 In the absence of any defined destination targets, future accommodation need has been assessed using a bottom-up approach that combines current supply, occupancy data (from CoStar and AirROI/Lighthouse/AirDNA) and organic demand growth assumptions to project indicative demand to 2036. Current occupied room and unit nights are grown forward year on year, with a modest adjustment for displaced demand (room nights lost from the district at peak periods) and, for serviced accommodation, a fair-share assumption of even demand spread across the year.

3.1.13 Three growth scenarios have been tested. Conservative assumes 1% growth in 2026 rising to 1.25% p.a. from 2027, reflecting weak near-term economic conditions and cautious consumer spending. Realistic, used as the central position, assumes 1.6% p.a. from 2027, aligned with the OBR's March 2026 GDP forecast and the UK Performance Review 2026 (Knight Frank/Hotstats) ADR and RevPAR projections. Optimistic assumes 2% p.a. growth, supported by Sevenoaks CoStar data showing 1.8% average RevPAR growth over the past three years and evidence of both displaced demand and non-serviced booking growth. As forecasts of this length carry inherent uncertainty, given most commercial forecasting is limited to three to five years, the 2036 projections should be treated as indicative and reviewed regularly as new local or regional data emerges.

3.1.14 Projected demand is assumed to be absorbed into existing supply up to a mature market average occupancy of 70% for serviced and 50% for non-serviced accommodation, with any demand above these thresholds representing evidence of a need for new supply. Given the relevance of hotel supply just outside the district boundary, a sensitivity check has also been applied, assuming 20% of this external supply represents demand genuinely attributable to Sevenoaks, grown forward at the same rates as the base case.

Table 15 SEVENOAKS DISTRICT SERVICED ACCOMMODATION INDICATIVE SUPPLY GROWTH FORECAST

Sevenoaks-Serviced Accommodation-Indicative Forecast of New Room Supply										
Scenario	Base Demand at 70%	Projected room nights		Excess room night demand over base		Additional Market supportable rooms		Sensitivity-what if? other supply included	
	2025	2031	2036	2031	2036	2031	2036	2031	2036
Conservative	153,045	168,327	179,113	15282	26069	42	71	54	90
Realistic	153,045	171,426	185,586	18381	32541	50	89	64	111
Optimistic	153,045	175,086	193,310	22042	40265	60	110	76	137

3.1.15 The serviced sector has the potential to grow supply over time-taking the middle ‘realistic’/modest scenario:

- An increase of 50+ rooms e.g. to replace the Royal Oak if a suitable inn/boutique operator were to consider a suitable site within 5 years.
- An increase of a 100+ room hotel within ten years-effectively potentially being provided by the new Swanley council led Hotel should that project materialise. If branded this could also attract some brand created additional demand to the area.
- Under the sensitivity appraisal of a more regional approach to supply, these indicative figures suggest that this additional supply could be achieved around two years earlier i.e. in 2030 and 2034 rather than 2031 and 2036.
- We note that the London Golf project would create a major destination resort if it materialises and if so it may attract new elements of demand and have spin off referrals when major events are held, benefiting the whole market and raising its profile as a hotel destination

3.1.16 The non-serviced accommodation capacity model estimates how far Sevenoaks' existing stock can absorb future growth in overnight demand before additional supply is required. It applies the current blended occupancy level to the existing stock of 850 rooms, units and pitches (an estimated 2,545 bedspaces) to establish a current baseline of approximately 408,727 visitor-nights per annum.

3.1.17 This baseline is compared against a fulfilment threshold capacity, the point at which existing stock becomes effectively constrained during peak periods, weekends and school holidays, rather than a measure of full physical capacity. A 50% fulfilment threshold has been applied across the non-serviced sector, giving a threshold capacity of approximately 464,463 visitor-nights per annum, and indicating theoretical spare capacity of around 55,736 visitor-nights before the existing stock reaches its effective limit.

Table 16 SEVENOAKS DISTRICT NON-SERVICED ACCOMMODATION FORECAST & SPARE CAPACITY

Scenario	2036 visitor-nights	2036 implied occupancy	Spare capacity utilised	Visitor-nights requiring new supply	Indicative additional accommodation required by 2036
Conservative	467,418	50%	55,736	2,955	c.5 rooms / units / pitches
Realistic	484,308	52%	55,736	19,845	c.36 rooms / units / pitches
Optimistic	508,201	55%	55,736	43,738	c.80 rooms / units / pitches

3.1.18 The forecast above is, by construction, a demand-following model. It grows the existing pool of visitor-nights while holding today's accommodation mix broadly constant, testing only whether current stock could absorb future demand. Given that existing stock trades well below its fulfilment thresholds, this should be read as a conservative floor rather than the district's true potential, since it quantifies only demand that already exists and says nothing about the demand a broader offer would itself generate.

3.1.19 **Growth is substantially shaped by the product on offer**. A district whose non-serviced provision is concentrated in self-catering and seasonal camping attracts a correspondingly narrow range of visitors at a correspondingly narrow range of times; broadening the offer broadens the market, much of it genuinely additional rather than competing demand. It also addresses the district's key weakness, its concentration in the summer peak: year-round product such as rural lodges, wellness and retreat accommodation, group provision and attraction-linked stays spreads demand into shoulder months, lifting occupancy and commercial viability across the board. **If Sevenoaks wants to grow at pace rather than simply accommodate the growth its current offer happens to produce, policy should actively enable well-located, distinctive new provision that broadens and deepens the offer**, even where the model does not yet register a numerical shortage. **The figures are a foundation for a growth strategy, not its limit.**

How?

3.1.20 Hotel & visitor accommodation development **delivery** can take a number of forms, across existing sites (up-grading, re-positioning and expanding), or new development, either total new build or via conversions of an existing building (office block, ex-banks, retail premises etc). Outside built up areas this might be via conversion of country houses and farm buildings, as well as the addition of new units of suitable design and setting. The addition of accommodation to existing infrastructure (pubs, wedding venues, attractions) can utilise existing services, access and facilities as well as help make these businesses more financially resilient in the long term.

3.1.21 Delivering a hotel or other visitor accommodation development involves a number of roles in the process – a landowner, an investor, a developer, an operator, a sales & marketing agent and/or franchise owner. These roles can be delivered by one entity or a series of partners. **Councils can**

play and are playing a role in hotel and visitor accommodation delivery – as indeed Sevenoaks are doing at Swanley - especially where there is an element of market failure, control over sites, and an opportunity to prove a market and underpin wider regeneration and economic benefits.

VISITOR ACCOMMODATION DELIVERY AND OPERATING MODELS

	A	B	C	D	E
OPTION	FULL SITE OWNER PROJECT SUPPORTED BY CONSULTANTS	SITE OWNER PLAN, BUILD & SITE OPS --- SALES AND MARKETING BY A THIRD PARTY	SITE OWNER PLANNING & BUILD --- THIRD PARTY SITE OPS, SALES AND MARKETING	SITE OWNER SECURES PLANNING --- THIRD PARTY BUILD, SITE OPS, SALES & MARKETING	EXCLUSIVE THIRDPARTY PROJECT --- SITE SOLD/LEASED
PLANNING & DESIGN	ALL BY SITE OWNER	SITE OWNER	SITE OWNER	SITE OWNER	THIRD PARTY Planning & Design
CONSTRUCTION & DELIVERY				THIRD PARTY Construction & Delivery	THIRD PARTY Construction & Delivery
SITE OPERATIONS			THIRD PARTY Operations	THIRD PARTY Operations	THIRD PARTY Operations
SALES & MARKETING		THIRD PARTY Sales & Marketing	THIRD PARTY Sales & Marketing	THIRD PARTY Sales & Marketing	THIRD PARTY Sales & Marketing
CAPITAL COST	HIGH	HIGH	HIGH	MID	LOW
SHARE OF INCOME	HIGH	HIGH - MID	MID	MID - LOW	LOW
OVERALL RISK PROFILE	HIGH	HIGH - MID	MID	MID - LOW	LOW

4. RECOMMENDATIONS & FORWARD ACTION

4.1.1 The strategy and delivery of the identified hotel and visitor accommodation opportunities will need to be supported by a number of strategic actions relating to inward investment, planning, business support, destination development and marketing, plus on-going monitoring of the sector. The table below summarises the approach to each and key actions.

RECOMMENDATIONS & FORWARD ACTION	
RATIONALE	**ACTION**
PLANNING	

Cited by accommodation developers as a key obstacle to development, the planning response aim is to create a policy framework for visitor accommodation development across Sevenoaks District that is as positive and flexible as is possible in a location that is 93% Green Belt and 60% designated National Landscape.
The key challenges sit beyond the urban areas, yet the rural areas and associated designations have significant potential to attract high value tourism, get more benefit from tourism activity, and use the tourism interest and potential investment to underpin destination development. Finding routes to address the tension between development and protection of the area's countryside is critical to fulfilling the potential the area has to offer.
The emerging Local Plan is an opportunity to do this, as well as to strengthen the retention of existing hotels and visitor accommodation.
	• Local Plan action
	  o Utilise the Local Plan review process to include policies and text that can help deliver the positivity and flexibility needed in the planning framework to realise the full range of market opportunities identified in this study in appropriate locations that are also commercially workable. The ambitions for the visitor economy in the Economic Development Strategy should be given a spatial expression through this review.
	  o The Regulation 18 draft policies for tourism and rural diversification present a strong framework that covers a lot of what makes a good practice visitor accommodation policy and options for development in Green Belt. It can be further strengthened for the Regulation 19 consultation by:
	    ▪ Specifying the type of accommodation that market potential has been identified for so providing a steer to the market and a more diverse offer that can help grow the market
	    ▪ Featuring year-round ambitions for the sector in the policy and text
	    ▪ Recognising the need in appropriate locations for staff accommodation
	    ▪ Avoiding the potential for mis-interpretation of phrases such as 'well-related to'
	    ▪ Using language that ties in sustainable credentials to accommodation design and development
	  o Citing the Hotel and Visitor Accommodation Study and the Economic Development Strategy as part of the evidence base and using these within development management decision-making provides hooks to hang future planning approvals particularly in 'challenge' locations.
	• Development management
	  o Development management practice to address some of the issues most commonly encountered by hotel and visitor accommodation developers include:
	    ▪ Access by public transport – should not be a reason for refusal, though a positive where it is. NPPF recognises some types of offer require a remote location.
	    ▪ In support of achieving a year-round visitor economy and market, give sympathetic consideration to year-round opening rather than restricting operations to certain

	months – especially if to avoid permanent residential use which can be controlled in other ways. ▪ Revisiting occupancy conditions to use beyond purely' holiday' which theoretically excludes non-holiday e.g. business tourism use – the term 'visitor' or short term let would embrace all types of stay. ▪ Use legal agreements and guest registers to enforce/prevent permanent residential use. ▪ The retention policy has been strengthened and is more specific about the evidence needed in support of change of use. Development management could reasonably request that where independent verification of the evidence is needed, these costs should be covered by the applicant. o Encourage active use of the pre-application process to enable planners, working closely with tourism teams, to actively engage with accommodation developers and shape schemes. Focus should be on planning and conservation requirements, strategic tourism fit and commercial viability being discussed hand in hand to provide the best possible chance of achieving planning permission and scheme viability. This might include joint site visits. Whole estate plans might also be usefully encouraged for larger estates with multiple use opportunities. • Sites for hotel and visitor accommodation development o Support the site identification process to find sites with planning potential that match hotel and visitor accommodation investor requirements. o Input to masterplans at town and individual site/estate level to optimise the delivery of hotel and visitor accommodation, ensuring that identified sites are deliverable and fit with market and developer/operator requirements. o Provide a planning input to the identification of Council owned sites for hotels as well as cabins, aires and other forms of visitor accommodation. • Planning intelligence • The monitoring of planning applications and pre-apps for hotel and visitor accommodation development provides an important input to keeping a finger on the pulse of this dynamic sector. This should form part of an on-going sector monitoring process and present opportunities to intervene and support where issues are identified.
INWARD INVESTMENT	
The Brief for this study identified informing developers and operators – as well as the Council - of market opportunities as a key use of the outputs of this research. The investment response is essentially about pro-activity and directed effort to achieve the stated ambitions, supported by the wider scheme of recommended actions.	• Pro-active hotel and visitor accommodation developer engagement o Following up developer interest expressed on an individual basis o Inviting accommodation developers into the area for familiarisation visits o Engagement with key site owners and scheme promoters to find solutions to delivery issues on any stalled schemes and proposals and identify potential delivery/operating partners o Raising the profile of Sevenoaks – possibly with strategic Kent/West Kent partners - as an investment location for hotels and visitor accommodation through a communications strategy

The research for this study has identified interest in the development of hotels and other forms of visitor accommodation, both from existing operators looking to expand, upgrade or re-position, and from developers and operators interested in new-build opportunities. The soft market testing undertaken has essentially 'warmed up' interest that should be pro-actively furthered via a range of actions.	to the tourism and hotel/visitor accommodation industry and their agents/advisors, and through attendance at relevant exhibitions such as UK REIIF and MIPIM. • Working up site opportunities o Identifying and further investigating sites with planning potential and match to developer requirements o Undertaking a survey of landowners to promote the identified opportunities and bring sites forward o Particular focus on sites with Council control and identification of potential quick win opportunities o Working with agents to identify properties for conversion and existing accommodation for redevelopment. • The Council role in delivery • Given the challenges in the investment climate generally, and specific local market challenges, there are a number of opportunities for hotel and visitor accommodation development that are likely to need some form of public sector intervention to make them happen. Sevenoaks is already well-versed in this and is currently engaged in a hotel opportunity at Swanley. Numerous Councils across the country have done this, from a place-making and regeneration perspective, but also realising an income for their authority as a result. The findings of this study endorse the approach and encourage the Council to continue in this endeavour as the most likely delivery mechanism secure a hotel for Swanley.
VISITOR ECONOMY BUSINESS SUPPORT	
Establishing a package of business support services and information to provide advice and guidance to smaller scale, independent visitor accommodation businesses/potential developers to help delivery of a range of hotel and visitor accommodation opportunities, and enhance sustainability and other benefits.	• Explore the potential to deliver a mix of business support for visitor accommodation development proposals through site visits, telephone consultations, workshops, access to online resources, toolkits and other guidance and online training sessions. Again this might be an initiative that could be delivered with West Kent or Kent-wide partners. UKSPF has been a source of funds for this type of initiative in the past; future replacement growth funds might be an option to support this. There might be opportunities to piggy-back other business support programmes and the work of VisitKent. • Core themes to promote include: o Sustainable tourism accommodation o Accessible tourism accommodation o Experiential tourism accommodation • Examine good practice examples to inform the process: o https://business.visitlincolnshire.com/ o The National Forest Sustainable Tourism Accommodation Programme - https://www.nationalforest.org/tourism o Lincolnshire Pub Diversification Programme - https://business.visitlincolnshire.com/blog/new-support-programme-for-pubs/ o https://www.visitcountydurham.org/business-advice/

DESTINATION DEVELOPMENT & MARKETING	
Building awareness of the Sevenoaks, West Kent and Kent county visitor economy offer will be key to driving demand into visitor accommodation businesses. Similarly, the wider development of the destination supports the visitor accommodation business, and vice versa, motivating reasons to visit and enhancing the overall offer across the year and to a wider range of markets.	• Hotels and visitor accommodation cater for a leisure and business tourism demand much of which is generated predominantly by outside demand generators – attractions, events, major corporates. Continued action to grow these markets to generate new demand will fuel market growth for the accommodation offer, and in turn the accommodation will support the destination. • The Council and its public sector partners have a role to play in public realm, the development and maintenance of trails and cycleways, country parks, signage and interpretation, car parking, all of which impact the visitor experience and their continued investment will be important to support the accommodation offer. • Tactical marketing and events programmes focused around identified periods of spare capacity to up visitor numbers and nights within the existing supply, and create new demand especially from markets that will visit mid-week and off peak, should also be a priority. • Supporting the growth of the wider economy will be important to drive demand from corporate markets which can complement leisure demand at different times of the week and year. The development of employment land and business parks therefore continues to be important to the sector. The north of the District with its motorway connections and London sphere of influence is also an opportunity for growth to fuel hotel demand; furthering this, including facilitating the development of the Sports Arc, might present one of the few opportunities for developments of scale, so should be prioritised.
MONITORING	
Research to establish a clear picture of visitor accommodation supply and performance that has been provided as a baseline by this study should also underpin forward policy and action relating to investment in the sector, through mechanisms for up-dating both supply and performance.	• A range of mechanisms can be used to up-date hotel and visitor accommodation supply and performance, either on an on-going basis or as part of a regular annual or 6 monthly snapshot. Which route is chosen will depend to some degree on the resource available, for both data purchase and manipulation, and the ability to deliver this in-house or externally. • The key information to up-date is: o Planning applications and pre-apps for hotel and visitor accommodation development and ideally implementation o Serviced accommodation/hotel performance data via CoStar subscription. This also provides some intelligence on development proposals and supply. o Non-serviced visitor accommodation via Lighthouse and AirDNA, again via subscription.

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