



London Tourism  
Vision 2006-16

# Vision for London



‘By 2016, London will be recognised as the leading global city for tourism and as a constantly evolving destination. London will deliver a high quality visitor experience, continually surprising and exciting our visitors with a vibrant, contemporary, diverse offer in an historically and culturally rich environment. Tourism in London will contribute to the economic success of the city and the quality of life for Londoners.’

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This document should be read in conjunction with the associated Tourism Action Plan.

# Foreword



# Foreword

## Foreword by the Mayor

I believe that London is the greatest city in the world and that it has something to offer every type of international and domestic visitor. London is an exciting metropolis that embraces diverse cultures and welcomes every community. All of this is reflected through its cuisine, shops, music and colourful events. London's tourism industry is also one of the most important sectors in the local economy and in the run up to the Olympics and Paralympics Games in 2012, it is critical to ensure that our status as a world city remains unchallenged. The development of tourism in the capital over the next ten years is therefore vital for the industry.

The tourism sector contributes up to £15 billion to London's economy and supports around 280,000 full-time jobs (see appendix one). It includes everything from family visits to an attraction, to international conventions and exhibitions welcoming thousands of business visitors from all over the world. London has many large tourism employers, particularly in the accommodation sector but the majority of tourism businesses are small and medium sized enterprises (SMEs), many of which are run as family concerns. Whilst domestic day visitors represent the largest number of overall visitors, it is overnight visits that contribute most in terms of expenditure, and business visitors in particular who provide the greatest contribution to tourism income.

Over the past three years, London's tourism agencies have been completely restructured to better reflect the capital's status as a market leader and gateway to the rest of the UK. My agency for business and jobs, the London Development Agency (LDA), is responsible for tourism development, and has contracted Visit London to deliver marketing of London and to reflect industry views.



The increased funding channelled into tourism since 2003 has enabled London to maintain and improve its market share - a major achievement in the context of the widening range of destinations available to travellers - and to help overcome the effects of international events that have impacted on destinations worldwide.

As we progress through the Olympics planning period, London's tourism economy remains as strong as ever but we cannot afford to stand still. A great many achievements have been realised in the life of the first London Tourism Action Plan (2003-06) but much more remains to be done to ensure that London provides the high quality experience demanded in an increasingly competitive world.

This Tourism Vision is fully integrated with other Mayoral Strategies to ensure that we develop as an exemplary, sustainable world city based on three interwoven themes:

- Strong, diverse long-term economic growth
- Social inclusivity to give all Londoners the opportunity to share in London's future success
- Fundamental improvements in London's local environment and reduction in London's impact on the global environment

In order to be fully recognised as a world leader in welcoming visitors from every corner of the globe, my new ten-year vision will:

- Create a sustainable world city based on strong long-term economic growth, social inclusion and environmental sustainability
- Continue to develop London's role as a world city, demonstrating the vibrancy, diversity and unique heritage of the city, and building on the unique opportunity to promote London offered by its hosting of the 2012 Olympic and Paralympic Games
- Ensure that visitors experience welcoming and quality services and facilities
- Provide an inclusive city that is more accessible and develops its tourism product in an economically, socially and environmentally sustainable way
- Support growing professionalism in the tourism industry within the capital so it can be recognised as a career of choice for local residents
- Provide support and assistance to the tourism industry, sharing knowledge and ideas, promoting best practice and scope for improvement

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I look forward to continuing to work with Government and all London stakeholders to ensure that London continues to be a leading global destination for visitors. I believe this Tourism Vision sets clear priorities to achieve this.

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A handwritten signature in blue ink that reads "Ken Livingstone". The signature is written in a cursive style.

**Ken Livingstone**  
Mayor of London

# Introduction



Over the past six years tourism delivery in London has changed almost beyond recognition. Following the creation of an Executive Mayor and the Greater London Authority (GLA) in 2000, London now has a central point of co-ordination with the ability to view the capital in its entirety.

# Introduction

## Background

Over the past six years, tourism delivery in London has changed almost beyond recognition. Following the creation of an Executive Mayor and the Greater London Authority (GLA) in 2000, London now has a central point of co-ordination with the ability to view the capital in its entirety.

A central co-ordination point and clear strategy for the development and promotion of tourism in London could not have come at a more critical time. Almost immediately after the Mayor was elected, the UK was hit by Foot and Mouth Disease which had a devastating effect on the tourism industry, particularly on the levels of overseas visitors entering the UK. The global industry was also severely affected by the events of 9/11, the SARS outbreak and by an unfavourable exchange rate. It became very clear, very quickly, that the lack of co-ordinated activity and effective resourcing for London's tourism industry was compounding the difficulties. As a result, in 2002 the Mayor created his first Plan for Tourism in London. This plan outlines the development priorities for the tourism industry in 2003-06.

The Mayor's Plan for Tourism had four main strategic priorities: growth, dispersal, resources and diversity & inclusion. The Mayor devolved statutory responsibility for the delivery of tourism to the LDA. Consequently, the LDA developed the London Tourism Action Plan 2003-06 to deliver the four strategic priorities.

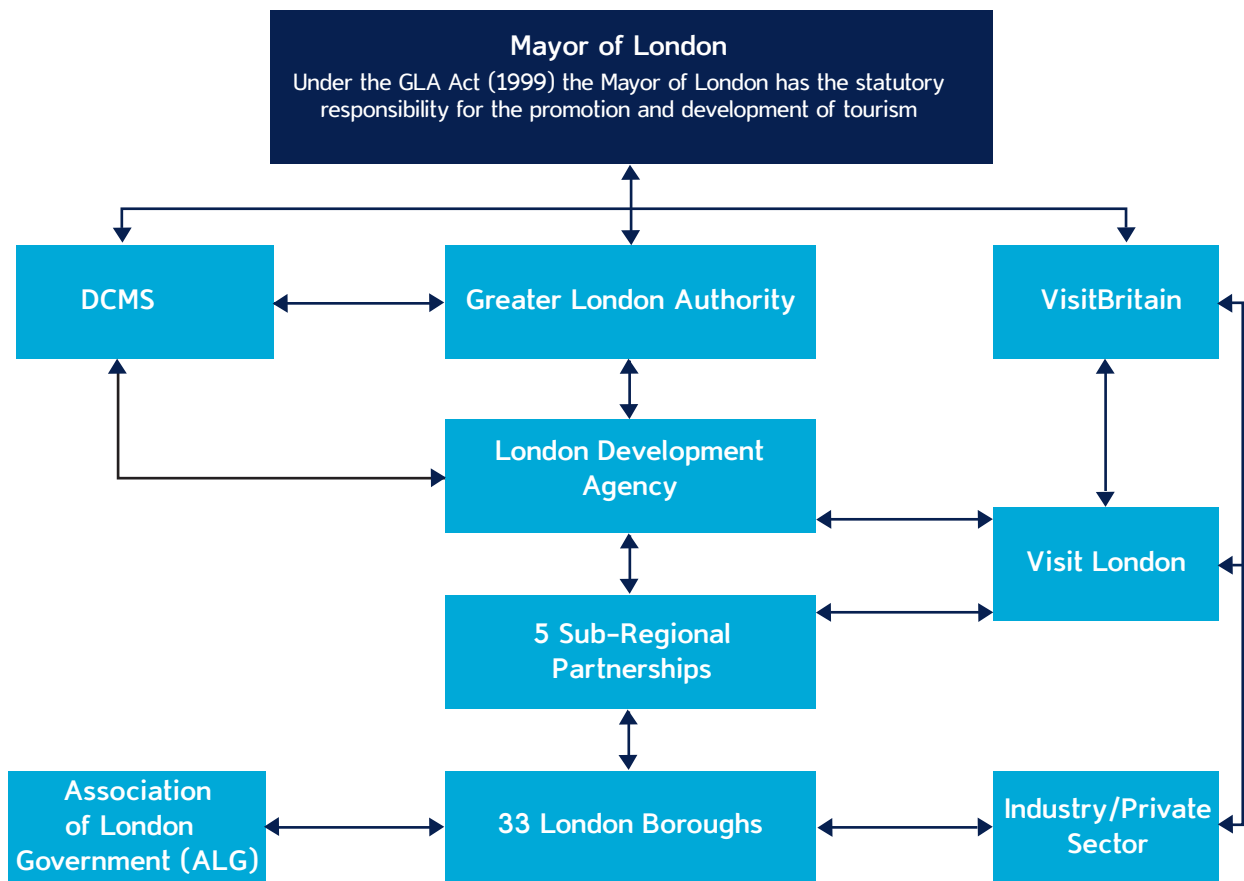
The Tourism Action Plan in turn identified four main pillars of activity: Leadership & Promotion, Market Development, Evidence & Intelligence and Product Development and a range of actions were identified against each. One of the first activities undertaken by the Mayor's Office and the LDA was to transform the London Tourist Board into Visit London, to ensure a 'fit for purpose', best-in-class organisation that could deliver the marketing and promotion activities outlined within the Action Plan.

Since launching the Mayor's Plan for Tourism and the Tourism Action Plan 2003-06, great strides in tourism development in London have been achieved. In 2006, London can confidently claim a good track record of implementing tourism strategies and policies. The Mayor, the GLA, the LDA and Visit London all have clearly defined roles and a close working relationship. London now has the structures in place and the capability to successfully implement strategic, long-term actions as well as being able to react quickly and decisively to crises such as the July 2005 terrorist attacks on London.

In July 2005 London won the honour of hosting the 2012 Olympic and Paralympic Games. This is an historic achievement for London and adds even more significance to the importance of tourism development in the capital and London's gateway role to the rest of the UK. The work embarked upon as an outcome of this vision will be critical in ensuring that 2012 is the best Games yet and that London reaps the rewards and realises the legacy benefits of being a successful host city.

This new tourism landscape demands a longer-term vision for tourism in order to see London through the Olympics and beyond to 2016. This ten-year vision takes into account the progress that has been made over the last three years, builds on the achievements, recognises the changing global context for tourism and sets new challenges and priority areas for action going forward. In order to deliver the ten-year vision a series of three/four year Action Plans will be developed. This document should therefore be read in conjunction with the corresponding Action Plans, the first of which runs from April 2006 to March 2009.

## Leadership of tourism in London



# Introduction

## Department of Culture, Media and Sport (DCMS)

Central Government Department that sponsors tourism and part-funds tourism activity in all of the nine English regions. Provides funding for tourism in London via the GLA to enable it to fulfil its gateway role.

## Mayor's Office

Under the GLA Act (1999) the Mayor of London has the statutory responsibility for the promotion and development of tourism. This responsibility is devolved to the LDA.

## Greater London Authority (GLA)

Through the GLA, the Mayor leads on the strategic development of tourism, together with the LDA. Receives DCMS funding for tourism in London and oversees the delivery of the Mayor's Plan for Tourism by the LDA.

## Association of London Government (ALG)

Part think-tank and part lobbying organisation, supplies services on behalf of the London Boroughs and spreads good practice.

## VisitBritain

Markets Britain to the rest of the world and England to the British. Their mission is to build the value of tourism in Britain. Funded by the Department of Culture, Media and Sport.

## London Development Agency

Part of the GLA Group and the Mayor's Agency for business and jobs. The LDA is one of nine Regional Development Agencies (RDA) in England. Funded by Central Government (DTI and ODPM) to deliver economic development and regeneration priorities. The LDA has overall responsibility for the promotion and development of tourism in London and therefore delivery of this London Tourism Vision and associated London Tourism Action Plans. This responsibility was devolved to the LDA by the Mayor of London and the LDA's performance in this respect is monitored by the GLA.

The LDA has contracted Visit London to deliver all marketing and promotional activities in relation to the new Tourism Vision and Action Plans. The LDA works closely with the sub-regional partnerships in central, south, north, east and west London to develop bespoke strategies for tourism development in each of the sub-regions.

## Visit London

Visit London is majority funded by the LDA to deliver the marketing and promotion sections of the London Tourism Action Plan. Visit London is the official marketing organisation for the capital. Visit London's aim is to promote London to domestic and overseas leisure and business visitors, as well as to Londoners. Visit London also receives income from private sector partners and sponsors.

## Sub-Regional Partners

The LDA has recognised the need for more sub-regionally focussed working to improve the spread of tourism benefits. The LDA works with existing organisations in the five sub-regional areas to deliver the Sub-Regional Tourism Development Strategies.

## Boroughs

There are 33 Boroughs in London. Tourism, given its non-statutory status, is viewed differently across the Boroughs. Some Boroughs have dedicated staff and budget to lead the local tourism agenda, others are not able to give tourism priority.



## London 2012 – the opportunity

London is already a premier visitor destination, however, it is increasingly facing stiff competition from other world cities and emerging destinations - there is no room for complacency. Hosting the Games could help propel London to be the number one visitor destination worldwide. The 2012 Olympic and Paralympic Games give London the opportunity to spread the benefits of tourism throughout London and offer an unprecedented opportunity to market the capital to the rest of the world and particularly to new markets. Whilst the Games themselves cover only a short period of time, in the pre and post-Olympic periods, London will benefit from hosting the Games. Previous host cities of the Games have, in different ways, found that the Olympics have been instrumental in enhancing the prestige of their respective cities. Based on these experiences, the benefits to London are likely to include<sup>1</sup>:

### An overall boost in tourism

The four most recent Olympic Games host cities all experienced increases in tourism whether this is measured in terms of spend per head in the long-term (from a 22% increase in Atlanta to a 65% increase in Seoul), the spend of new visitors or by the increased numbers of international meetings and conferences the cities were able to attract in the years after the Games.

The British Olympic Association reports that by the end of 2001, Sydney had made over £2bn from tourism as a direct result of the previous year's Games. The London Business Board estimates that a similar gain for the capital would be closer to £1.5bn<sup>2</sup>. Despite already being one of the most visited cities in the world, London requires a concerted effort to boost its tourism industry. The London Games offer an opportunity to diversify the tourist experience within London, as well as to distribute visitors more widely across London.

### New visitors

Recent experience has shown that the UK's tourism businesses can be adversely affected if they are over-reliant upon only a few overseas markets such as the US. The global exposure of the London Games has the potential to open up London to new markets, making the visitor economy less vulnerable to international crises. Prior to the 1992 Olympics, Barcelona was ranked as the 16th most popular city tourist destination in Europe. By 1999 it had risen to third<sup>3</sup>.

### An even more powerful marketing brand

Hosting the 2012 Olympic and Paralympic Games, London can draw on its distinctive cultural heritage and its unique diversity to showcase the capital as a city that has welcomed faiths and cultures from around the world.

The London Games will be a national event and the rest of the UK will also reap benefits. As well as venues around the country hosting events (for example, Old Trafford in Manchester and Millennium Stadium in Cardiff), there will be potentially lucrative opportunities for areas across the country to host visiting teams' pre-Games training camps as a base for their preparation in the weeks and months leading up to the London Games. Prior to the 2000 Sydney Games, around 125 teams from 39 different countries undertook pre-Games training in locations across Australia. This is estimated to have injected some Aus\$70m into the economy of New South Wales alone.

In summary, increased (and sustained) levels of tourism spending resulting from London's hosting the 2012 Olympic and Paralympic Games should:

- safeguard businesses
- increase jobs
- create wealth in London's economy
- help to sustain the vast array of entertainment choices
- act as a catalyst to regeneration
- boost London's convention and conference trade.

This Vision outlines the key challenges that London faces in the run-up to 2012 and beyond. The Action Plans seek to address these challenges, putting in place the building blocks towards achieving a successful Games in 2012 and realising the legacy benefits thereafter.

1 Source: Realising the Benefits of Hosting the 2012 Olympic & Paralympic Games, LDA

2 Source: Quoted in London 2012: Planning for a Legacy, Briefing Paper, September 2004, London Metropolitan University

3 Source: [www.creativeresistance.ca](http://www.creativeresistance.ca)

# Key achievements 2003-06



The London Tourism Action Plan 2003-06 was created to deliver the Mayor's Plan for Tourism and was divided into four strategic areas: Leadership & Promotion, Market Development, Product Development, Evidence and Intelligence. There have been a significant number of key achievements in each area.

# Key achievements 2003-06

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## Leadership and Promotion

### Tourism high on the agenda for Regional and Central Government

As a consequence of the activity carried out by the GLA, LDA and Visit London, tourism is high on the agenda for London Government. Almost every strategy and plan produced by the GLA and LDA features tourism (where applicable), and tourism was an integral part of the 2012 Olympic bid submission. In addition, London is now viewed as equal in status to the other national tourism organisations of Wales and Scotland. The Department of Culture, Media and Sport (DCMS) has recognised London's responsibility as a gateway and supports London in delivering gateway activity.

### Development of a recognisable tourism brand for London

The London tourism brand 'Totally London' has been developed as a high profile, well-established brand for marketing and promoting London (overseas as well as domestically) and to encourage civic pride amongst Londoners. Integrated leisure and business marketing and PR activity has been implemented across all geographical markets. In 2004, overseas visits to London grew by 14.5% on 2003 to almost 13.4m and spending increased by 9.7% on 2003 to £6.4bn.

### Effective contingency framework in place

An effective contingency framework for tourism in London is now in place, including the London Resilience Forum, the Business Support Contingency Planning Toolkit and improved collaboration with VisitBritain. A wealth of experience has been gained from the Gulf War, SARS and the July 2005 London bombings.

### Increased engagement of the sub-regions and Boroughs

It is a Mayoral priority to distribute the benefits of tourism throughout London. The sub-regional network has been implemented in order to achieve this priority. The network organises London into five sub-regions (as identified in the London Plan) and helps to translate London-wide tourism policies to a more local level and take account of more local issues through sub-regional strategies and action plans. This sub-regional approach has led to a major increase in local Borough participation in tourism initiatives and improved communication between Visit London and the industry in the sub-regions, leading to enhanced marketing delivery.



30 St Mary Axe and Post Box

## Market Development

### Step-change in marketing and promotion

There has been a step-change in marketing through the innovative use of PR, promotion and marketing tools in a number of key markets including the USA, Japan, Europe and the UK. Visit London's three-year business plan 2004-07 included a comprehensive business and leisure tourism marketing framework. Going forward, Visit London has produced a four-year business plan 2006-10 to build on successes and momentum. The importance of emerging markets has been identified, including China, Pacific Rim countries, India, Australasia and South America. These territories will continue to be researched and scoped for future activity.

### Strong focus on the diversity of London's tourism offer

London's diversity gives it a unique atmosphere, vibrancy and heritage. Diversity is a key priority for the Mayor. Visit London has promoted the diversity of tourism in London through all its marketing campaigns and activity, including London TV and visitlondon.com and has contributed to a number of ethnic guides (e.g. The Mayor's Guide to Asian London).

More specifically, the youth and gay and lesbian markets have been targeted utilising various promotional tools working with VisitBritain in key overseas destinations. The 'visiting friends and relatives' (VFR) market has also been targeted using marketing, PR campaigns and online promotion. Visit London has engaged with Film London to define the role of film within the visitor decision-making process and created campaigns to further develop and excite this audience.

### Developed business tourism services and offer

Visit London has been actively developing its convention bureau activities. A significant sales team has been developed, effecting a step-change in face to face sales activity. From April–December 2005, Visit London's convention bureau took confirmed bookings for meetings with a value of £638m (£33m more than last year for the same period). Marketing activities have been integrated into the overall marketing team and new tools for London and partners have been developed to support sales activity, for example 'Here's the Plan' with ExCeL and east London partners.

As part of the work to review the feasibility of a London International Convention Centre, a review of 'Destination Marketing Industry Best Practice in Business Tourism' was undertaken. It showed that Visit London has made significant progress in developing the marketing of the London convention product, however the development of the convention bureau service and positioning of the London offering will be a crucial part of the ongoing market development. Key findings from the review have been incorporated into the Action Plan associated with this Vision.

The LDA, in partnership with Visit London and the Business Tourism Advisory Group has developed a subvention policy. Subvention is defined as a support package for business tourism events, and may include free transport for delegates or civic hospitality to encourage organisers to select London as a conference destination.

### Better co-ordination of marketing activities with national, regional and sub-regional bodies

Visit London works with VisitBritain and other public and private sector partners in a number of areas to maximise London's overseas branding and gateway status. To ensure that all Boroughs benefit from the economic return of tourism there is co-ordination of marketing activity at a sub-regional level to promote 'all' of London.

# Key achievements 2003-06

## Evidence and Intelligence

### Improved economic data

The need for robust data on the value of tourism was a key action in the first Mayor's Plan for Tourism. A pan-London Local Area Tourism Impact (LATI) model is now in place. The new model measures the value of the visitor economy at a Borough, sub-regional and pan-London level. It is an invaluable tool, showing the significant impact that visitor spend has on London's economy and aiding strategic decision-making at the local level.

### Improved understanding of the visitor experience

It is also important to measure and evaluate visitor satisfaction. A research programme is in development that will enable measurement of visitor perceptions of the capital, covering areas such as customer service, value for money, safety and the overall visitor experience of London. This survey will be conducted annually and will sample leisure visitors from both overseas and the UK. This will build on the existing London Overseas Visitor Survey (LOVS) which has produced valuable analysis of overseas visitor perceptions in recent years.

### Improved visitor information provision

Three studies on visitor information have been completed and will be used to form the basis of a Visitor Information Framework for London. Work is ongoing with the Britain and London Visitor Centre to provide pan-London visitor information to visitors and a programme of support for Tourist Information Centres has been implemented. This support includes staff training, mystery shopper exercises and sharing of best practice.

### Robust skills research

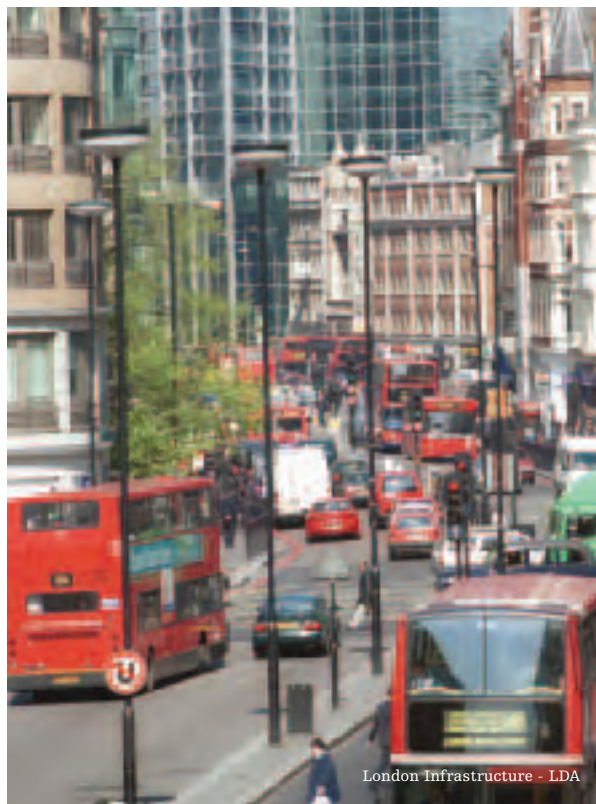
Detailed research has been conducted into the relevant issues relating to the definition of the Hospitality, Leisure, Travel and Tourism (HLTT) sectors. Skills shortages have been identified and an overall evaluation provided on training and employment in the HLTT industry. This research has formed the basis of the LDA's HLTT skills and employment programme (outlined in the product development section) which commenced delivery in April 2005.

### Progress on coach tourism

Research has been completed on the value and volume of coach tourism in London. This research has been used as a baseline to develop the Coach Tourism Concordat for London which was signed up to by key stakeholders in December 2005 with the aim of improving the coach tourism experience.

### Improved sub-regional market intelligence

A range of market intelligence has been gathered through the sub-regional network programme providing valuable information at the sub-regional level, including market segmentation and brand mapping data. The findings from these studies will be used as a basis for a positioning guide for each of the sub-regions to enable marketing organisations (including Visit London, Boroughs, consortia and individual tourism businesses) to better promote sub-regional destinations.



## Product Development

### Progress on the potential development of an International Convention Centre for London

A Mayoral Commission was established in 2004 to assess the feasibility of developing an International Convention Centre in the capital. The Commission reported in October 2005 and approval has been granted by the LDA Board to begin looking at location options and potential funding packages.

### Business support pilot completed

A pilot programme aimed at supporting SME tourism businesses was run in 2004 to identify key product support needs and concerns for SMEs. The findings will form the basis of an integrated business support programme in the new Tourism Action Plan 2006-09.

### Large-scale skills investment

The HLTT in-depth research resulted in the LDA funding 18 different programmes which together form the HLTT Skills and Employment Action Plan. The purpose of this action plan is to assist the LDA and its partners in intervening strategically to improve the range and quality of learning provision across the HLTT industry. This provision is aimed at people who are entering or returning to employment or training as well as those already working in the industry.

The action plan is focussed on the main people and skills issues facing the industry in London; recruitment, retention, upskilling and employer engagement. This is a three year programme of work which began in April 2005.

### Major Events Strategy for London developed

A Major Events Strategy is under development to enable London to improve its ability to bid for and win the opportunity to host major events. An international best practice study has already been completed and several events have been supported. For example, the Olympic Torch Relay in June 2004 brought a crowd of 70,000 to The Mall and generated over 300 items of publicity with a total PR value of almost £5m. In 2005, London's New Year celebrations saw 250,000 people gather to watch the highly successful fireworks display from the London Eye, with a further 10.1 million viewers watching the event broadcast live on the BBC.

### London Tourism Accessibility Advisory Group set up

The LDA has hosted a public/private sector conference to discuss and take forward actions on accessibility. Initial research has also been carried out to inform the future strategy on accessibility issues and how they can be tackled. A London Tourism Accessibility Advisory Group has been set up by the LDA to advise and steer the visitor accessibility work. This group consists of both industry representatives and disability groups.

# Strategic Context



The Mayor/GLA publishes a range of statutory and non-statutory strategies and plans and it is important that they complement one another. The GLA functional bodies are the Metropolitan Police Authority, the London Fire Emergency Planning Authority, Transport for London and the London Development Agency. New tourism policy needs to comply with strategies delivered by the GLA and its functional bodies.

# Strategic Context

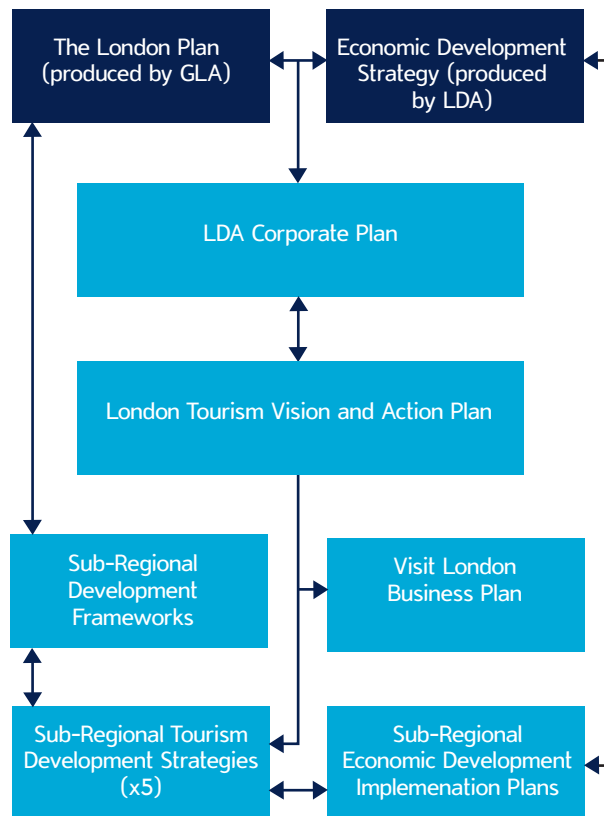
## The strategy and planning hierarchy for tourism in London

The Mayor/GLA publishes a range of statutory and non-statutory strategies and plans and it is important that they complement one another. The GLA functional bodies are the Metropolitan Police Authority, the London Fire Emergency Planning Authority, Transport for London and the London Development Agency. New tourism policy needs to comply with strategies delivered by the GLA and its functional bodies.

The Economic Development Strategy and the London Plan are of direct relevance to tourism development. The London Plan sets out an integrated social, economic and environmental framework for the future development of London. Sub-Regional Development Frameworks (SRDFs) provide guidance on implementation of the London Plan policies at a more local level. Together, these will impact on both the London Tourism Vision and Action Plans as well as the Sub-Regional Tourism Development Strategies.

Whilst the diagram highlights the main linkages between the London Plan, the Economic Development Strategy and the Tourism Strategies, there are many other linkages that occur with other strategies such as transport, culture, training and skills and environmental (in particular air quality, waste and energy). The GLA Strategy Co-ordination Group works to ensure that there is consistency across these policy areas. This means that the London Tourism Vision and Action Plans, although primarily about tourism, must also ensure that, for example, opportunities to improve the health of Londoners and contribute to sustainable development are recognised.

Additionally, DCMS are leading on the development of a 'Tourism 2012 Strategy'. This ten year strategy will be launched at the end of 2006 following national consultation. The aim of the strategy is to bring together and co-ordinate the public and private sector to prepare for the London Games and make the most of its legacy. This London Tourism Vision has been developed in close collaboration with DCMS, VisitBritain and Visit London to ensure that it complements the forthcoming Tourism 2012 Strategy.



## Mayoral objectives

London is arguably the most exciting, dynamic city in the world. As a theme that feeds into both the London Plan and the Economic Development Strategy, tourism must relate to the Mayor's vision for London as a sustainable world city by contributing to strong, long-term economic growth, social inclusion and the achievement of environmental sustainability.

### Promote the breadth and diversity of London's cultural offer

London's tourism product encompasses far more than the traditional heritage package that has for so long been a feature of visitor expectation. The city can offer the greatest range of restaurants, attractions, leisure, retail and cultural experiences to be found anywhere in the world. London is now developing an exciting year-round events programme that means there is something unique to come and see whatever the season.

### Improve quality and planning for the 2012 Olympic and Paralympic Games

London is committed to improving the quality of the visitor experience and in advance of welcoming the world in 2012, a number of product development measures need to be put in place in the immediate future to ensure that the capital is adequately prepared. For example, London needs to improve the quality and amount of accessible visitor accommodation, to improve visitor information and guiding and to raise quality standards throughout the sector. Such programmes need to be co-ordinated with other delivery agencies through the pre-Olympics planning period and to take into account the goals of the London Games legacy.

### Promote inclusion

London is one of the most culturally heterogeneous cities in the world and the diversity of its population and communities is one of its greatest assets, not least for how it is perceived by visitors. It boasts over 300 languages spoken amongst its

population, 14 faiths practised<sup>1</sup> and almost a third of London's population is from minority ethnic groups<sup>2</sup>. London can be regarded as a city where everybody can feel at home. Whilst promoting the city to overseas visitors, Londoners also need to be encouraged to take advantage of the opportunities on their doorstep and to participate in the experience that attracts people from every corner of the world to visit.

### Contribute to the achievement of environmental sustainability

Environmental performance within the tourism sector must be improved across a range of issues, in particular encouraging businesses to reduce climate-changing emissions, water use and waste generation. Factors such as climate change will affect tourist behaviour in the longer term. A warmer UK climate will provide opportunities to London's tourism sector as the country begins to benefit from more Mediterranean style weather and an extended summer season. However, there will be a range of environmental impacts to counter-balance this. Warmer summers will mean that parts of London's transport system will become increasingly uncomfortable<sup>3</sup>. There will also be increased pressure on London's water resources. Extreme weather will lead to erratic demand for resources.

### Encourage policies that spread the benefits of tourism

Whilst it is acknowledged that central London is the magnet which attracts both overseas and domestic visitors, there is scope to encourage repeat visitors to visit the wealth of tourism products and 'hidden gems' outside the traditional tourism centre. By doing this, tourism as a sector can be more inclusive and spread the benefits of economic development whilst alleviating pressures on tourism 'hot-spots'. Improvements to the transport system are of key importance in encouraging the spread of tourism benefits.

<sup>1</sup> Source: Redefining London's BME Owned Businesses, LDA, 2005

<sup>2</sup> Source: Census 2001, Office of National Statistics

<sup>3</sup> Source: London's Warming, London Climate Change Partnership, November 2002

# Strategic Context

## Mayoral objectives (continued)

### Further develop the skills agenda

London has a thriving and expanding visitor economy, especially within the hospitality sector and yet there is a significant skills gap in most central London areas, with hotels and restaurants employing staff from overseas rather than tapping into local labour markets. Addressing the skills issue is a long-term priority and we need to move from a position where tourism and hospitality are regarded as low paid/stop-gap options for school leavers towards tourism becoming a career of choice. Staff retention is also a key issue in London and working with employers and employees across a range of organisations, we need to upskill the workforce through various training and retention initiatives. Providing good quality employment and training opportunities will in turn make a substantial contribution to the social wellbeing and quality of life of Londoners.

### Support the sector

To date there has always been a lack of information about the scale of the tourism sector in London, how many people it employs and what it is worth. This has been addressed by the commissioning of the Local Area Tourism Impact model and this tool will be used to help plan for tourism development at both a pan-London and Borough-wide level. In particular, small businesses need support and encouragement from key public sector bodies and by having access to greater industry intelligence, business support and partnerships can be further developed.

### Embrace emerging markets

The world market for tourism is undergoing dramatic change with emerging markets in Russia, China and India likely to transform the traditional pattern of overseas promotional activities. New markets may have differing needs and expectations of London, meaning that the traditional image of the capital needs to be further updated and supported by reflecting the diversity and creativity that London has to offer. Emerging markets also offer greater opportunities to integrate host communities within the tourism sector and to extend the number of people visiting friends and family.

### Increase the economic benefits of business tourism

Business tourism is less affected by market fluctuations and international events/crises than leisure tourism. Returns on investment are significantly higher than for leisure markets but it is also a very competitive field. London has to adapt to the needs of the business tourism market and to ensure that it can compete with emerging business destinations in Europe or in long-haul locations. By increasing business tourism, the leisure visitor market will also be improved as repeat visits are generated by business visitors coming back to the city to explore its rich cultural offer. The need for a central London location to accommodate an International Convention Centre (ICC) has been established through the Mayoral Commission. An ICC for London would result in spin-off benefits throughout the business tourism sector encouraging further meetings, incentive and conference business as well as encouraging repeat visits and extended stays.

### Supporting and managing the late night economy

Tourism has a role in supporting a diverse night-time economy. The visitor economy can help to sustain a range of London's cultural activities throughout the day such as theatres, museums and galleries as well as supporting a host of businesses including nightclubs, bars and restaurants. The night-time economy can be both an attraction for visitors to an area and can directly impact on the visitor experience. An integrated approach to managing the impacts of the night-time economy can help to realise its benefits for residents and visitors, while reducing adverse impacts which may occur.

## Alignment with Economic Development Strategy objectives

Within the LDA's Economic Development Strategy, the London Tourism Vision and Action Plan are closely aligned to the following objectives and actions:

- **Ensure a coherent approach to marketing and promoting London**  
Annually assess the coherent approach to marketing through a wide range of measures and indicators
- **Co-ordinate effective marketing and promotion activities across London**  
Achieve growth in numbers of domestic and international visitors over the life of the Action Plans
- **Maintain and develop London as a top international destination and principal UK gateway for visitors, tourism and investment**  
Invest in Visit London as official marketing partner to deliver focussed, targeted marketing activity
- **Improve the skills of the workforce**  
Enable people to access jobs, support the creation of learning opportunities and provide advice and support to employers
- **Maintain London's position as a key business location**  
Investigate International Convention Centre development. Invest in business tourism. Attract major new business events e.g. conventions, exhibitions, etc
- **Support SMEs to increase survival, productivity and employment potential**  
HLTT programme. Tourism business support programme (covering quality, accessibility, sustainability, business management advice)
- **Promote the development of a healthy, sustainable, safe and high quality urban environment**  
Promote green spaces and public transport, improve access to and quality of tourism product. Encourage distribution of visitors across London. Improve tourism businesses' environmental performance



# Strategic Context

## Key challenges facing the tourism industry over the next 10 years

The tourism industry in London faces a number of challenges in the coming years, the impact of which have been considered in creating this Vision and the corresponding Action Plan, recognising that some challenges are more predictable than others.

### Use of the internet in booking and planning trips

The use of the internet has grown exponentially. In the United States in 2005 more travel dollars were spent online than offline<sup>1</sup> and almost one in five UK holidays are now booked online. 74% of US business travellers use the internet to book their travel arrangements<sup>2</sup>. The European online travel market is predicted to reach €28.5 billion by 2006<sup>3</sup>. London must, therefore, exploit this medium to its full advantage to communicate with its customers in the way in which they want to receive information.

### Cash rich and time poor

We live in an increasingly affluent worldwide society (for example British people are 55% better off than in 1990)<sup>4</sup>. This has shifted the focus away from expenditure and material goods towards service and experience. This provides the imperative for London to deliver high quality service and continue to offer new experiences to encourage repeat visits. London is able to offer value for time, as the city is compact and well connected (variety of transport improvements such as the East London Line and Docklands Light Railway extensions). The London Plan seeks to make London even more compact and accessible in the future, building upon London's existing urban quality and sense of place through higher density mixed-used development and intensification, creating vibrant, culturally rich places.

### New and emerging markets placing different demands

The world tourism market is undergoing significant change e.g. the signing of 'approved destination status' in January 2005 between Britain and China. Emerging markets such as Russia, China and India are likely to change the traditional pattern of marketing and some elements of product development. London needs to ensure that it can provide the product that fits the needs of the new markets along with meeting different cultural requirements.

### Global competition

Whilst harnessing the power of emerging markets to London's advantage is essential, it is important to recognise that there is currently an emergence of new competitors. London must continually invest in its status as a 'World City' in order to maximise the value that tourism can bring to the economy. London's 2012 Olympic and Paralympic Games will provide a unique selling point and unrivalled media coverage – this opportunity must be maximised in the long term to increase London's competitiveness.

### Integration with inward investment

The changing market conditions (e.g. emerging markets and globalisation) provide new opportunities to integrate the promotion of London as a city to invest in with the promotion of London as a visitor destination. London's status as a 'World City' is based on its unique strengths, including diversity, and is driven by a mix of inter-related sectors including culture, tourism, learning, government and finance.

### Emergence of new technology

Technology developments are moving incredibly fast and their impact on our lives is set to grow. The Asia-Pacific region accounts for almost half of the 118 million Wi-Fi (wireless internet connection) users worldwide<sup>5</sup>. In 2000 there were 40 million UK mobile phone customers; by 2004 this had risen to 60 million<sup>6</sup>. Mobile devices are becoming ever more sophisticated and increasingly a phone is no longer just a phone but a portable source of information. This presents new opportunities for information delivery to visitors whilst they are on the move.

1 Source: TravelWeekly.com

2 Source: European Travel Commission, New Media Review, email update October 2005

3 Source: European Travel Commission, New Media Review, email update November 2005

4 Source: Henley Centre, Economic Update, July 2004

5 Source: European Travel Commission, New Media Review, email update October 2005

6 Source: Henley Centre

### Ageing society

In 2005, 25% of the UK population was over 55. This is set to rise to 31% by 2021<sup>1</sup>. Older people are likely to be in better health and with higher disposable income than in previous generations. To quote the Mayor's Older People Strategy,

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**“Most people can expect to have a long retirement, which will be among the best times of their lives, but this crucially depends on a good quality of life. Many studies have shown that older people are among the most satisfied members of society and have a good or very good quality of life.”<sup>2</sup>**

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This market represents a high value opportunity for London, but also a challenge in terms of London's current accessibility.

### Crisis management

The impact of national and international events on London's tourism industry have been well documented from the Foot and Mouth Disease outbreak and 9/11 to the July 2005 bombings in London. The capital has effective contingency frameworks and communication mechanisms in place which have been tested as a result of recent crises. London needs to continue to develop and refine its response to crises to ensure the impacts on tourism businesses and visitors are minimised.

### Sustainability

In environmental terms, London already has significant tasks ahead of it: limited water resources, increasing waste generation combined with limited disposal options, the impact of warmer summers on living, working and travelling in London and increasing risk of flooding. A range of strategies and action plans are in place to address these issues. The success of tourism in London, while adding to the local economy, will put additional strain on these tasks. In turn, changes in the local environment will affect the attractiveness of London to visitors.

Furthermore, the risk to the global environment, and by extension, to the global economy is becoming ever more imperative. Tourism adds significantly to climate-changing emissions, primarily from air transport, but arguably these would occur wherever the visitor went. Therefore, a key challenge for this London Tourism Vision will be to minimise the additional impact of visitors on the London environment, and to ensure that tourism in London contributes to the achievement of global sustainability. In doing so, this London Tourism Vision needs to ensure that the economic and social benefits derived from tourism actually do improve the lives of Londoners.

<sup>1</sup> Source: UK National Statistics

<sup>2</sup> Source: Towards an older people's strategy for London. A draft Mayoral strategy for consultation; Greater London Authority, November 2005



# Ten Year Vision for Tourism



‘By 2016, London will be recognised as the leading global city for tourism and as a constantly evolving destination. London will deliver a high quality visitor experience, continually surprising and exciting our visitors with a vibrant, contemporary, diverse offer in an historically and culturally rich environment. Tourism in London will contribute to the economic success of the city and the quality of life for Londoners.’

# Ten Year Vision for Tourism

Through the consultation process (see Appendix 2), an overall Vision for London and 5 key themes have been identified to guide tourism in London.

## Vision for London

‘By 2016, London will be recognised as the leading global city for tourism and as a constantly evolving destination. London will deliver a high quality visitor experience, continually surprising and exciting our visitors with a vibrant, contemporary, diverse offer in an historically and culturally rich environment. Tourism in London will contribute to the economic success of the city and the quality of life for Londoners.’

## Key Themes

- A global city
- A quality visitor experience
- A sustainable and inclusive city
- Professionalism at every level
- Industry support and partnership

This chapter details each theme, its headline vision, key objectives and description of the areas of work to focus on in order to achieve the overarching Vision.

## A global city

The vision -

London will be the number one city of choice for visitors and the leading world city. London’s marketing will be targeted, innovative, competitive and dynamic. London will be an evolving city which welcomes the world.

## Key objectives

- Attract first time and repeat visits from both new and existing markets (in both leisure and business tourism)
- Deliver targeted campaign planning and implementation across relevant markets and positioning London as a vibrant and diverse ‘must see’ destination
- Position ‘Totally London’ as the leading London tourism brand
- Maximise London’s role as a gateway to the rest of the UK
- Position London as a premier global sporting, cultural and business events city

London is unique in its mix of offer; historically and culturally rich, but also has a vibrant, contemporary offer. In London, tradition and diversity go hand in hand. There are over 300 languages spoken and over 14 different faiths practised<sup>1</sup> in the capital. A range of diverse attractions sit side by side with the more traditional. This is a unique selling point for London as this mix of offer enables London to attract first time and repeat visitors alike with a range of experiences. London is constantly evolving and growing, ensuring that visitors have never ‘done’ London. In fact, the 2012 Bid CEO stated that “London’s immense diversity is the key to the city’s bid to win the 2012 Olympic and Paralympic Games”<sup>2</sup>.

London is a ‘must-see’ destination for many visitor markets and it is crucial that London maintains and strengthens this position into the future. There has been a step-change in London’s marketing and promotional effort over the three years of the first Mayor’s Tourism Action Plan. Visit London is now a highly focussed marketing organisation that can deliver high quality marketing, promotion and PR in order to raise London’s profile in key target markets and drive visits to the city.

<sup>1</sup> Source: Redefining London’s BME Owned Businesses, LDA, 2005

<sup>2</sup> Source: www.london2012.co.uk

In September 2005, London won the Conde Nast Traveller Award for Best UK City (jumping from 10th place in 2004). This award, voted for by the readers, highlights London's position as number one city of choice for visitors. In order to maintain this position London's marketing and promotion must continue to be dynamic, targeted and competitive. London must sustain this position by working in both existing and emerging leisure and business markets and working with key sectors to showcase London as a 'must-visit' destination. The domestic market is equally as important. Whilst there are significant challenges in attracting UK visitors, they represent great potential for London and continue to be a core target market.

It is equally important that London's communities are encouraged to make the most of the range of facilities and services that surround them. Londoners and 'visiting friends and relatives' campaigns are key to building civic pride and informing the local market about what is on their doorstep.

The London tourism brand 'Totally London' is now a high profile brand. Brand tracking research conducted by MORI revealed strong awareness and acceptance of the 'Totally London' brand among London residents, UK and overseas leisure visitors. 'Totally London' has a set of brand values which can be bought into by all London tourism businesses. The brand must be supported to enable further strengthening of the brand mark and its associated values across the world.

In 2005, London won the honour of hosting the Olympic and Paralympic Games in 2012. This is an opportunity for London to be showcased around the world as a global host. The Games offer a unique opportunity to be seen by a global audience of 4 billion people, two thirds of the world's population, highlighting the capital in a way that would ordinarily take many years and significant marketing investment to achieve. It was also announced in early 2006, that London had won the right to host the Grand Depart of the Tour de France, the largest and most popular annual spectator event in the sporting world. This will demonstrate London's ability to host complex, international events; the benefits are expected to be great with around 1 million spectators coming to London and an estimated global television audience of over 100 million.

As well as these big wins, London already hosts an enviable programme of world class events such as the Notting Hill Carnival, Wimbledon and London Fashion Week to name but a few. However, it has been recognised that more can be done to secure and develop a programme of major events that will further increase London's international profile, attract additional spend and generate significant economic and reputational benefits to the city. London needs a major events strategy to ensure that it is positioned as an events capital of the world. The delivery of this strategy will help to attract and deliver high quality events that reflect London's world city status and deliver wide-ranging benefits to the capital and its communities.

This Vision also addresses the supply side issues through a number of key areas, including hotel room and convention space capacity. The subject of an International Convention Centre (ICC) for London is not a new one. There have been three feasibility studies in the last 15 years. These each found in favour of a centre but the projects never came to fruition. Previously there had not been a proper understanding within central or local government of the importance of business tourism or its contribution to the local and national economies. In early 2004, a Mayoral Commission was set up to examine the business case for the development of an ICC in London. The Commission reported in October 2005 and the findings were clear – the case for an ICC is extremely strong.

Work is now beginning to drive forward the recommendations of the Mayoral Commission. If an ICC is built in the central tourism district in London it is projected that the development would generate economic benefit of nearly £400m in net incremental direct expenditure for the UK each year. A minimum of 5,500 jobs would be created in London and elsewhere in the UK. As with the Olympic and Paralympic Games developments, there is a tremendous opportunity to make a new ICC an international exemplar of sustainable design and provider of quality jobs that directly support the future of Londoners.

# Ten Year Vision for Tourism

## A global city (continued)

Business tourism continues to be a priority over the next ten years. The findings from the 'Destination Marketing Industry Best Practice Review' highlighted a number of key priority actions such as closer partnership working between Visit London and London's hotel industry to co-ordinate room allocations and deliver competitive rates for major event bids and to develop a specific subvention strategy to encourage conference organisers to choose London.

The GLA are developing best practice guidance on managing the night-time economy which will recognise the importance of the night-time economy to London's residents and visitors. It will address issues such as safer travel at night, encouraging a diverse range of night-time activities and tackling anti-social behaviour – all of which directly impact on the visitor experience and on the quality of life for people living in the city.



## A quality visitor experience

### The vision -

London will deliver a top quality visitor experience from pre-arrival to post-departure, ensuring full satisfaction from all aspects of a visit to London.

### Key objectives

- Develop and deliver a Visitor Information Framework for London that creates lasting improvements in visitor information provision
- Improve the quality of accommodation and visitor perceptions of value for money
- Improve the quality of attractions through a range of business support
- Improve London's sense of welcome in order to improve and add value to the visitor experience
- Research and monitor the quality of visitor experience

The visitor's experience begins when they are deciding where to go for their trip and continues after the trip has ended. Consequently, London needs to be exceptional in all aspects of the visitor journey; in providing the motivation to visit, in booking the trip, upon arrival, the duration of the stay, at the point of departure and in nurturing the memory. London needs to encourage its visitors to return and experience all that the capital has to offer. This has implications for marketing, information provision, skills, quality throughout all aspects of the visitor journey and distribution of visitors.

The quality of the visitor experience has a direct impact on the likelihood of repeat visits and on recommendation to others. Whilst research shows that visitors find Londoners friendly, there is still a long way to go in order to provide a top quality visitor experience throughout the trip. By providing a top quality visitor experience, London will benefit from a more sustained repeat visitor market and an increase in word of mouth recommendations (in 2004, 91% of people said that 'when I find a company or product I like I recommend it to others'<sup>1</sup>). London needs to exceed customer expectations at all levels and budget and needs to ensure that visitors, coming to London for the first time and seeking low-cost accommodation, find clean and welcoming establishments.

<sup>1</sup> Source: Henley Centre, PCC 2004

The quality of the visitor experience has never been as important as in the run-up to the 2012 Olympic and Paralympic Games. London will play the international host; it is an opportunity to showcase London as a city which truly 'welcomes the world'. A large part of the visitor experience is the accommodation that visitors choose to stay in. The quality of accommodation is an ongoing issue on the tourism agenda for the whole of the UK. In 2005, common standards were agreed by the recognised quality assessment schemes (AA, VisitBritain, VisitScotland and Wales Tourist Board).

In London, the drive towards increasing the number of quality-assessed establishments will be achieved through investment in business support and working towards the promotion of assessed accommodation only. Both VisitBritain and Visit London have signed up to this ethos. VisitBritain will only promote assessed accommodation from January 2006. All Visit London accommodation partners will be quality assessed from April 2007. The London Games provides a catalyst for further investment in business support to encourage more accommodation providers to join the quality assurance schemes to ensure that visitors are able to make an informed decision on the accommodation they choose. The business support programme will also address ways of supporting non-assessed accommodation to achieve the entry level to the quality assessment process.

Improved quality is not only an issue for accommodation. London has the greatest concentration of attractions in Britain and visitor attractions are a key component of the visitor experience. The existing quality scheme for attractions (Visitor Attraction Quality Assurance Scheme – VAQAS) assesses all areas that impact on the quality of the visitor experience (ranging from enquiry through to departure). At the time of writing, the VAQAS scheme was under review to make the scheme more consumer-focussed and recognised. It is important for the quality of London's tourism offer that visitor attractions are supported as an integral part of a trip.

London's overall 'welcome' has been much criticised. There is a lack of a consistent, welcoming environment at main gateways (such as hub airports, railway stations) and the ease of getting around outer London is questionable. There is a need to improve visitor information to enable visitors to get the most from their trip. Information must be delivered in a customer-focussed way, utilising both traditional and innovative delivery mechanisms. Public realm is also an integral part of the visitor experience. There is a need to communicate the importance of public realm management and improvements so that visitors have a positive all round experience and local areas can maximise the economic benefits of tourism.

# Ten Year Vision for Tourism

## A sustainable and inclusive city

### The vision -

London will move towards becoming sustainable and inclusive to all: financially, physically, socially and culturally.

### Key objectives

- Better understand visitors' motivations or barriers to visiting London
- Improve understanding of diversity/inclusiveness of London's product offer
- Improve the inclusivity and accessibility of the visitor experience
- Seek to improve the visitor experience of public transport
- Improve quality of coach tourism experience
- Increase profile and usage of services along the Thames
- Improve the sustainability and environmental performance of London's visitor economy

A successful tourism destination is one in which accessible and inclusive services and facilities are the norm rather than the exception. In order to achieve an inclusive destination, it is crucial to understand visitors' motivations and barriers to visiting London. Investigation must be carried out into current reasons for visiting in order to understand London's key appeal and barriers to identify the most important social, economic, cultural and physical issues. The findings from this research will inform long-term programmes of work which focus on key motivators and initiatives to break down existing barriers. This will enable London to be more inclusive to visitors (such as those with lower incomes, those whose first language is not English, or those with faith or religious needs).

Physical accessibility in London is a priority, indeed, the Mayor stated in 2004, "My vision is to create an environment in London in which all people have equal, easy and dignified access to London's buildings, places and spaces"<sup>1</sup>.

Physical accessibility is not just about wheelchair users, but also relates to those with sensory disabilities, older people and families travelling with pushchairs. Support must be given to tourism businesses to ensure that London improves its product offering to these groups.

There are approximately 10m disabled adults in the UK alone, with an annual spend of over £40bn<sup>2</sup>. Of these, at least 2.5m travel regularly, but many do not because facilities are not adequate to meet their needs<sup>3</sup>. At present very few accommodation providers have been assessed as being accessible. There is a real need for London to improve accessibility of its tourism product. This need will be met by the implementation of a programme of business support that encourages tourism businesses to improve their accessibility and more comprehensive, usable information through [visitlondon.com](http://visitlondon.com) for people with disabilities.

One of the significant issues for accessibility in London is the transport system. Whilst significant improvements have been made (for example, accessible low floor buses and London Underground's plan to make 25% of tube stations step-free by 2010), there is still some way to go. There needs to be further collaboration with TfL and other transport providers to ensure there is an understanding of the value and needs of visitors, from accessibility to ticketing issues. There also needs to be continued promotion of walking as a way of exploring the city. Work must be undertaken to make London more legible in terms of signage and wayfinding to aid the visitor on their journeys.

Maximising the economic, environmental and socio-cultural sustainability of tourism in London is a key imperative. The recently published United Nations Environment Programme/World Tourism Organisation guide for policy makers, 'Making Tourism More Sustainable', offers guidance on how to achieve this. A key feature of sustainable development is that economic, environmental and socio-cultural sustainability have to be pursued as a single objective, not as three disaggregated objectives. Otherwise, damage to the environment and social inequalities will compromise economic success.

<sup>1</sup> Source: Accessible London: achieving an inclusive environment. The London Plan Supplementary Planning Guidance, April 2004

<sup>2</sup> Source: [www.employersforum.co.uk](http://www.employersforum.co.uk)

<sup>3</sup> Source: Tourism for All UK

In terms of economic sustainability, one of the ways of ensuring a sustainable tourism market is to communicate the depth and breadth of the tourism offer throughout London to encourage visitors to return time and time again and to encourage Londoners to make the most of their city. The on-going sub-regional programme of work is a key contributor to encouraging distribution of visitors throughout London. This has an impact on environmental sustainability as visitors are encouraged to use public transport or walk during their stay in London and aims to alleviate the environmental pressures on tourism 'honey pots'. Strengthening links between businesses, reducing leakages and influencing levels of visitor spending on local products will also assist local economic prosperity. Delivering local skills programmes and encouraging improved employment quality will ensure a sustained supply of high quality labour to the sector and local jobs for local people. It will also be important to ensure visitor fulfilment by improving access for all, and to maintain a duty of care to visitors through monitoring and addressing visitor satisfaction.

In terms of environmental sustainability, work must be done to encourage tourism businesses to improve environmental performance including efficiency of energy and resource use and improving use of local supplier networks. Similarly, visitors must be encouraged to reduce their impact on the global and local environment, particularly around transport and promoting a 'Reduce, Re-use, Recycle' mentality. The introduction of the Mayor's Climate Change Agency will give a focus to the key environmental issues that London faces such as water resource shortages and flood risk. The Tourism Action Plans will support any tourism related issues that the Climate Change Agency identifies for improvement. In addition there must be a focus on minimising visitors' impact on sensitive natural and built environments.

Socio-cultural sustainability requires a focus on community wellbeing, by supporting measures to reduce congestion, careful planning of new enterprises and infrastructure, promoting resident use of facilities, and influencing visitor behaviour



towards local communities. Effort will be directed to encouraging cultural richness by working with diverse communities to preserve and increase prominence of cultural traditions and products - this will involve engaging with and empowering those communities. It will also be important to increase employment opportunities in the tourism sector for disadvantaged groups of Londoners and to facilitate and promote their holiday and leisure taking within London.

This London Tourism Vision can also act as a driver to support other Mayoral strategies such as the London Sustainable Food Strategy, the Transport Strategy, the Air Quality Strategy and the Waste Strategy.

# Ten Year Vision for Tourism

## Professionalism at every level

### The vision -

London will ensure that the tourism industry is recognised as providing diverse and interesting jobs and careers of choice, which offer opportunities for progression and skills development. Visitors to London will be offered a world class, quality customer experience by increasingly successful tourism businesses.

### Key objectives

- Provide the right people at the right time with the right skills
- Ensure that employees within the industry have the skills necessary to deliver truly world class customer care through productivity
- Ensure that the skills that employers need are available and fully match the job role requirements and expectations
- Ensure a high quality employer-focussed training offer

The Hospitality, Leisure, Travel and Tourism (HLTT) is a large and growing sector. It currently employs 1.9m people in the UK and contributes around 4% of GDP. London supports around 235,000 jobs in the HLTT sector<sup>1</sup>.

There are approximately 29,000 HLTT businesses in London. 67% of these are restaurants or pubs, bars and nightclubs. Over three quarters employ between 1 and 10 people and nearly two thirds of the workforce work on a full time basis. In London, 15% of sector employers report that vacancies are hard-to-fill (higher than the national average of 11%). Over two thirds of these vacancies are hard to fill due to a lack of people with appropriate skills<sup>2</sup>.

London needs to work hard to raise the profile of the industry so that it is not just seen as a job, but a career with great prospects. In other countries the hospitality and tourism (and all service) industries are highly regarded as a profession, not merely a stop-gap or a temporary job. The range of career opportunities and the value of the tourism industry is not recognised in the UK. The appeal of the Olympic and Paralympic Games could be used as a catalyst to encourage

potential candidates to join the hospitality and tourism industry and see how quickly they can work their way up the career ladder in a fast moving dynamic industry.

In 2004, the LDA conducted an comprehensive piece of research in order to understand the gaps in skills and employment in the HLTT industry. An action plan was produced which focussed on recruitment, retention, upskilling and employer engagement.

The research has given a longer-term strategic picture of where the gaps are and how they could be overcome. 23% of employers in London reported skills gaps and 11% of employees are not fully proficient in their jobs<sup>3</sup>.

Further work needs to be undertaken with employers in the industry to ensure there is an understanding of the business benefits that can be achieved through investment in training and workforce development. There also needs to be better co-ordination of training opportunities so that both employers and employees know where to look when a development opportunity arises. The tourism industry employs a significant number of people from BAME groups in London. Increasing skills in the industry will therefore have an impact on the skills and opportunities for these groups, which in turn will support the Mayor's objectives on diversity and opportunity.

There is work to do with training and education establishments to ensure that tourism qualifications are streamlined and are practical enough to be beneficial in the real world.

In February 2005, London had almost 3,000 vacancies in core HLTT occupations advertised in Jobcentres<sup>4</sup>. The largest number of vacancies was predominantly in hospitality within the food and beverage sector. However, there is a wide range of potential candidates for these jobs and employers need to be encouraged to look at new target audiences for recruiting such as women returners, 'third-agers' (50+), recent arrivals and disabled people. In order to attract these target audiences, employers need to ensure that they understand and meet the needs of these sectors of the population, for example, offer family friendly, flexible policies aimed at women returners.

1- 4 The Hospitality, Leisure, Travel and Tourism Sector in London, Regional Report, People 1st, February 2005

## Industry support and partnership

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### The vision -

London will have an innovative, flexible and comprehensive industry support network which enables the sharing of knowledge and ideas, resulting in a thriving and diverse range of quality, successful, tourism businesses.

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### Key objectives

- Deliver improved intelligence on the tourism industry to stakeholders
- Develop and maintain improved communication with the tourism industry
- Continue to improve co-ordination of efforts within the tourism industry
- Implement a programme of business support which improves the overall quality of the tourism product in London
- Facilitate a structured approach to accommodation development in London

Small and medium sized businesses are the life-blood of the tourism industry. The tourism industry in London is made up of a high proportion of SMEs and it is clear that there are significant business support needs. The business support programme must be driven by both the industry and market forces and ongoing analysis is needed to inform future interventions. It is important that SMEs are able to deliver a quality product backed up by high quality internal business practices to enable them to deliver a high quality customer experience. Business support programmes must support SMEs to achieve this.

In order to maximise the benefits of tourism we need to understand its true value. The Local Area Tourism Impact (LATI) model, provides details on the size and impact of tourism on London Boroughs, sub-regions and pan-London giving a robust assessment of tourism's economic value. It also gives all London Boroughs a much clearer picture of the value of tourism within their local area. This research has initially been commissioned for three years until 2009 and will be an invaluable tool to demonstrate the benefits of tourism development.

In order to enable tourism businesses to have one point of contact able to answer their business support questions and learn from best practice examples an open communication network is needed, where best practice is shared and market intelligence is disseminated.

Communication across the industry is important and it is clear that strong leadership and communication is needed from key public sector bodies (such as the GLA, LDA, TfL, Visit London and Boroughs) to guide and to keep the industry informed. This communication must be two-way to ensure that information is shared effectively.

In order to meet growing demand for accommodation and to drive improvements in the quality of London's accommodation stock, there is a need to implement a more structured approach to development planning for visitor accommodation and to provide a link between hotel developers and Boroughs. The GLA, together with the LDA, estimates that 40,000 extra hotel rooms will be required between 2007 and 2026. Because there will be a loss of hotel and B&B rooms during this period, in order to achieve this target a total of 50,000 new rooms will need to be built. The hotel development study undertaken by the LDA in 2004, showed that hotel developers have strict criteria when making a decision on a site including proximity of strong commercial and leisure demand drivers, good transport links and availability of visible, affordable sites. There is an opportunity to work with developers and Boroughs to facilitate and provide intelligence to ensure both parties' needs are met in accordance with other Mayoral strategies.

# Measures of Success



This Tourism Vision has a ten-year life span from 2006-16. The success of the Vision and Action Plans must be measured against tangible success indicators. The measures of success are set out on the following pages. The actual targets will be updated annually.

# Measures of Success

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## A global city

Objective	Target	Measure
Grow the value of London's visitor economy	Increase domestic and overseas visitors average spend - Domestic visitors - % increase spend per trip Overseas visitors - % increase spend per trip	Local Area Tourism Impact (LATI) model UK Tourism Survey (VisitBritain) International Passenger Survey (ONS)
Encourage distribution of visitors throughout London	% increase in number of visitors to outer London	Local Area Tourism Impact (LATI) model
Maintain or increase market share	Maintain or increase London's world market share of world tourism	World Tourism Organisation figures
Position 'Totally London' as the leading London tourism brand	% increase in brand awareness	Visit London brand tracking research

## A quality visitor experience

Objective	Target	Measure
Increase the number of quality assessed tourism product	x% of accommodation establishments quality assessed x% of room stock quality assessed x% of attractions quality assessed	Participation in National Quality Assurance Schemes Participation in visitor attraction quality scheme
Improve visitor satisfaction levels	Improve overall visitor satisfaction levels	Primary research is being commissioned to measure visitor satisfaction across a range of areas including transport, accommodation, attractions, safety and overall experience
Improve performance of Tourist Information Centres	Achieve x% or above in overall customer service satisfaction	National TIC Mystery Shopper exercise
Grow usage of visitlondon.com as a primary source of visitor information	x% increase in unique user numbers x% increase page impressions	Visit London web statistics

## A sustainable and inclusive city

Objective	Target	Measure
Increase the number of accessible accommodation providers	x% of accommodation establishments accessibility assessed % of room stock accessibility assessed	Participation in National Accessibility Schemes
Improve environmental performance of tourism businesses	Number of tourism businesses supported to improve environmental performance	Number of tourism businesses improving their environmental performance

## Professionalism at every level

Objective	Target	Measure
Recruit more people into HLTT industry	Number of people gaining employment in HLTT industry	HLTT monitoring programme - number of people gaining employment through the various recruitment programmes implemented
Upskill people in tourism industry	Number of tourism employees receiving skills training	HLTT monitoring programme - number of people assisted in their skills development as a result of LDA programmes (30 hours of learning)
Assist and guide businesses in training and workforce development	Number of tourism businesses with improved productivity through staff development	HLTT monitoring programme - number of businesses assisted to improve their productivity

## Industry, support and partnership

Objective	Target	Measure
Maintain/improve partner satisfaction levels of Visit London	Maintain propensity to renew membership	Visit London partner survey
Maintain a well supported visitor economy	Number of businesses receiving business support	Success measures will be defined in the Business Support Programme. It is likely they will include number of businesses receiving training, 1:1 business advice etc

# Abbreviations and Glossary



## Abbreviations

ALG	Association of London Government
BAME	Black, Asian and Minority Ethnic
BIDs	Business Improvement Districts
DCMS	Department of Culture, Media and Sport
GLA	Greater London Authority
HLTT	Hospitality, Leisure, Travel and Tourism
LATI model	Local Area Tourism Impact model
LDA	London Development Agency
LOCOG	London Organising Committee For The Olympic Games
LRS	London River Service
TfL	Transport for London
TIC	Tourist Information Centre
SME	Small and medium size enterprise
SRP	Sub-Regional Partnership
SSC	Sector Skills Council
VAQAS	Visitor Attraction Quality Assurance Scheme
VFR	Visiting friends and relatives

# Abbreviations and Glossary

## Glossary

### Association of London Government (ALG)

The ALG is committed to fighting for more resources for London and getting the best possible deal for London's 33 Boroughs. Part think-tank and part lobbying organisation, they also run a range of services designed to make life better for Londoners.

### Business Tourism

Servicing the needs of visitors whose purpose in being in London is business.

### Department for Culture, Media and Sport (DCMS)

The DCMS is responsible for Government policy on the arts, sport, the National Lottery, tourism, libraries, museums and galleries, broadcasting, film, the music industry, press freedom and regulation, licensing, gambling and the historic environment.

The DCMS is also responsible for the listing of historic buildings and scheduling of ancient monuments, the export licensing of cultural goods, the management of the Government Art Collection and for the Royal Parks Agency.

### Domestic Tourism

Servicing the needs of visitors whose purpose in being in London is leisure and who originate from within the UK.

### Health

The London Health Strategy defines health as not just the absence of disease, but also physical, mental and social wellbeing. It identifies that health is significantly affected by social factors such as employment, housing and social inclusion (health determinants).

### EnglandNet

Since January 2005, the EnglandNet platform and associated services have been owned, developed and operated by VisitBritain. Strategic governance is provided by a Programme Board comprising representatives from VisitBritain, the nine English Regional Development Agencies (RDAs) and their Regional Delivery Partners (RDPs). The objectives of the programme are: to build a national platform for the collection and management of information on English regional tourism product and its presentation via visitbritain.com and other tourism websites; to provide facilities to enable this product to be booked online by users of visitbritain.com and other tourism websites through which the product is presented.

### Greater London Authority Group (GLA Group)

The GLA Group consists of the Mayor, the London Assembly and four organisations that look after transport, the police, the fire and rescue service and economic development for London. They are:

- Transport for London
- The Metropolitan Police Authority
- The London Fire & Emergency Planning Authority
- The London Development Agency

The organisations in the GLA group are run independently of the Mayor, but the relationship between them and the Mayor is close. The Mayor sets their budgets, appoints their board members and works closely with them to improve London. Several of the board members are chosen from the London Assembly.

### Leisure Tourism

Servicing the needs of visitors whose purpose in being in London is leisure.

### London Development Agency (LDA)

One of nine Regional Development Agencies, established by the Government to promote economic development and regeneration. It is part of London Government and reports to the Mayor of London. It consults and works with the GLA and a wide range of public and private sector partners.

### London Unlimited

London Unlimited is delivered by Visit London in partnership with GLA, LDA, Think London, London Higher and Film London. It aims to develop a global brand for London that positions London as the best city in the world in which to invest, visit, study and conduct business. London Unlimited's mission is to create economic benefit for London by strategically promoting London as an international destination across a range of sectors to multiple audiences.

### Small and medium size enterprise (SME)

SMEs break down into micro, small and medium size organisations and are categorised by the EU as:

Micro	Businesses with less than 10 employees with a turnover of under €2 million
Small	Businesses with less than 50 employees with a turnover of under €10 million
Medium	Businesses with less than 250 employees with a turnover of under €50 million

### Sub-Regional Partners

The LDA has recognised the need for more sub-regionally focussed working to improve the spread of tourism benefits. The LDA works with existing organisations in the five sub-regional areas to deliver the Sub-Regional Tourism Development Strategies.

### Sustainable development

Development that meets the needs of the present without compromising the ability of future generations to meet their own needs. For London the key sustainability issues are social equity and inclusion and the protection of the local environment for Londoners; air quality, noise, traffic, safety, security, protection from flooding, avoidance of excess summer heat stress and avoidance of water restrictions. It also means ensuring London does not contribute to national and global environmental damage such as climate change, waste creation and resource depletion.

### VisitBritain

VisitBritain markets Britain to the rest of the world and England to the British. Their mission is to build the value of tourism and to build partnerships with – and provide insights to – other organisations which have a stake in British and English tourism. VisitBritain is funded by the Department of Culture, Media and Sport.

### Visiting friends and relatives (VFR)

Market segment that consists of visitors staying overnight (away from home) at accommodation occupied by friends or relatives.

### Visit London

Visit London is the official visitor organisation for the capital, funded by the LDA. Its aim is to promote London as the world's most exciting city by marketing to domestic and overseas, leisure and business visitors, as well as Londoners themselves. Visit London is a partnership organisation which also acts as a voice for London's tourism industry. It was formerly known as the London Tourist Board.

### World City

A globally successful business location paralleled only by two of the world's other great cities, New York and Tokyo, measured on a wide range of indicators such as financial services, Government, business, higher education, culture and tourism.



# Appendices



The tourism and hospitality sector is undoubtedly a key driver of London's economy and it is recognised in London's Economic Development Strategy as such. The figures demonstrate the substantial contribution tourism makes to the capital.

# Appendices

## 1. London's visitor economy

### Economic significance of tourism in London

The tourism and hospitality sector is undoubtedly a key driver of London's economy and it is recognised in London's Economic Development Strategy as such. The figures demonstrate the substantial contribution tourism makes to the capital.

Jobs <sup>1</sup>	Visits <sup>2</sup>	Spend <sup>3</sup>
280,000	26.2m	£9.2bn

The above figures are based on overseas and domestic visitors who stayed overnight and exclude day visits. Including day visits, total tourism spending in London amounts to around £15bn per annum<sup>4</sup>.

The sector encompasses a diverse range of sub-sectors including accommodation providers, catering, conference and exhibition venues, travel and tourism services, retailing, visitor attractions, restaurants and leisure facilities.

### Domestic and overseas tourism in 2004 in London breaks down as follows -

Domestic <sup>5</sup>			Overseas <sup>6</sup>		
Visits	Nights	Spend	Visits	Nights	Spend
12.8m	29.7m	£2.8bn	13.4m	90.2m	£6.4bn

### The case for public sector intervention

Tourism businesses conduct marketing to promote their businesses and their particular products, which are a component part of the destination. London is a destination representing the totality of the visitor experience and the sum of the individual products. As such, London needs appropriate destination management, marketing and promotion in order to maximise the wider economic benefits. Without public sector intervention London has:

**An inability to compete** - London's tourism sector would be unable to compete with its key, high-profile, publicly-funded competitors (New York, Paris and Sydney), who are already focusing efforts on building international awareness of their destinations through designated destination management organisations and high investment promotional campaigns.

**A lack of co-ordination** - London's tourism sector would not be able to respond appropriately in the event of a major crisis such as a terrorist attack or disease outbreak. The importance of a co-ordinated response to maintain tourism levels after a major 'shock' was illustrated by the significant decline in visitor numbers to London after Foot and Mouth Disease and 9/11.

**Slower growth** - Without a central co-ordination of efforts to market London as a destination in a consistent fashion, economic benefits of tourism would not be maximised (e.g. multiplier effects, supply chain, inward investment).

With no public sector intervention, the market would not promote London consistently or in a co-ordinated manner.

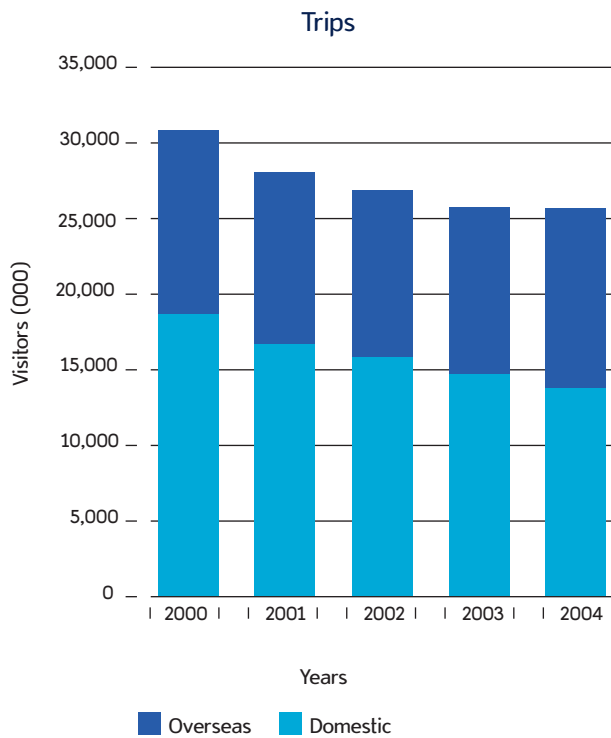
1 GLA Economics 2002  
 2 UK Tourism Survey 2004, International Passenger Survey 2004  
 3 As above  
 4 The Importance of Tourism in London, Visit London  
 5 UK Tourism Survey 2004 (excludes day visits)  
 6 International Passenger Survey 2004

## Visitor trends

Domestic and overseas visitor spend in London (excluding day visits) is slowly beginning to increase after a low of £8.6bn (2002) and in 2004 total overseas and domestic visitor spend stood at £9.1bn. Similarly, total nights spent in London was at a low in 2002, but increased by 2004 to 119.9m. This gives an average stay of 6.7 nights for overseas visitors and 2.3 nights for domestic visitors.

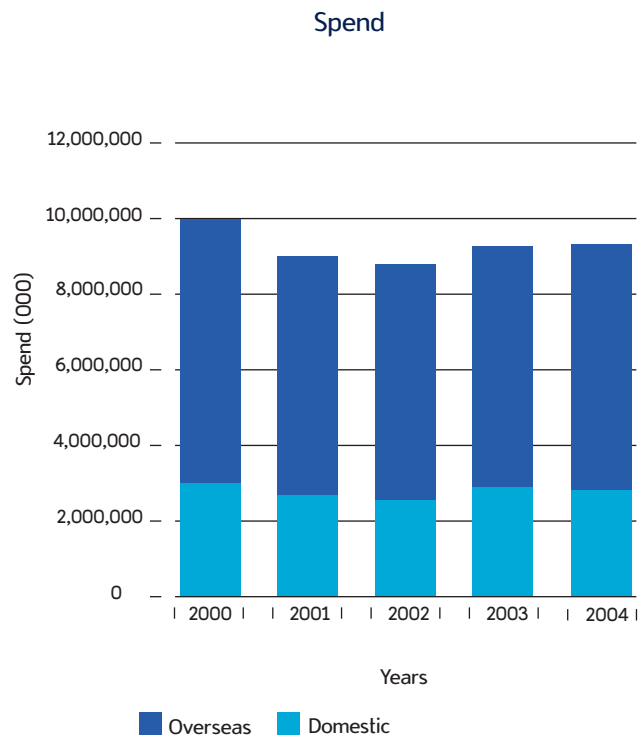
In 2004, overseas visitor spend in London was £6.4bn - almost 50% of total overseas visitor spend across the whole of the UK. VisitBritain estimates that tourism is worth 3.4% of UK GVA. In London, it is estimated that tourism is worth around 5-6% of GVA. This highlights the comparative importance of tourism in London versus tourism in the UK.

**Overseas and Domestic trips to London from 2000 to 2004<sup>1</sup>**



<sup>1</sup> Source: International Passenger Survey, UK Tourism Survey

**Overseas and Domestic spend in London from 2000 to 2004<sup>2</sup>**

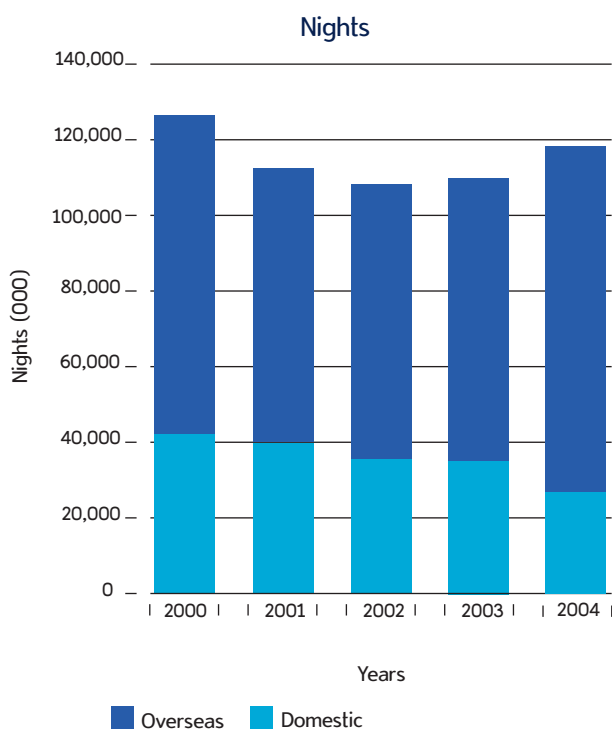


<sup>2</sup> Source: International Passenger Survey, UK Tourism Survey

# Appendices

## 1. London's visitor economy

### Overseas and Domestic nights spent in London from 2000–2004<sup>1</sup>



London's gateway status is similar to that of cities such as Sydney (50% of visitors to Australia) and Dublin (54% of visitors to Ireland). Other capital cities such as Paris (accounting for 12% of visitors to France) and Rome (accounting for 10% of visitors to Italy) do not dominate their respective national tourist economies to the same degree that London does in the UK.

### The benefits of tourism for Londoners

Tourism provides exceptional quality of life benefits for London's resident communities through both leisure and employment opportunities. An outstanding range of facilities and events are sustained by the purse of visitors, but enjoyed by Londoners alike.

Growth in the visitor economy benefits London economically, creating employment and income. This Vision seeks to ensure that the benefits of tourism are spread throughout London's sub-regions, communities and businesses (especially SMEs and BAMEs) through direct, indirect and induced spend.

Culturally, tourism enables people from different backgrounds to enjoy and celebrate their diversity, in particular through events such as the Notting Hill Carnival, the London Mela and Pride. In addition, tourism facilities can be important catalysts for and components of regeneration that improve areas both for residents and tourists alike. Evidence of this can be seen along Bankside and South Bank and new developments such as Silvertown Quays in the east of London.

Tourism development also engenders civic pride. In 2002 VisitBritain undertook research which focussed on community perceptions of tourism. 93% of those surveyed, who perceived they lived in a 'tourist area', said that they were 'proud that visitors think our area is worth visiting'.

<sup>1</sup> Source: International Passenger Survey, UK Tourism Survey  
<sup>2</sup> Source: International Passenger Survey 2004

### London as a gateway to the rest of the UK

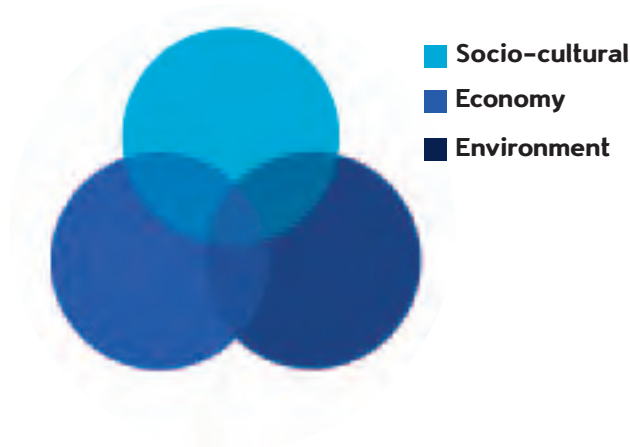
The success of London in the global tourism marketplace has a major impact on the performance of the UK tourism economy. The GLA has statutory responsibility to ensure that London acts as a gateway to encourage visitors to London to visit other parts of the UK. This responsibility has been delegated to the LDA.

London has long been established as the international gateway to the UK with 45% of all overseas visitors entering the UK via London. In 2004, 45% of all spend by overseas visitors in Britain was in London<sup>2</sup>.

## The need for a sustainable approach to tourism development

The Mayor defines sustainable development as, “creating a better quality of life for Londoners, both now and in the future, and requires us to pursue the Mayor’s objectives of economic development, social inclusion and environmental improvement simultaneously over the long term.”

Sustainability therefore, for tourism as for other industries, has three inter-dependent aspects: environmental, socio-cultural, and economic. Sustainability implies permanence, so sustainable tourism includes optimum use of resources, minimisation of negative ecological, cultural and social impacts and maximisation of benefits to local communities.



Whilst tourism brings a host of benefits, any negative impacts have to be managed and minimised. In London, the approach to sustainable tourism is driven by the London Sustainable Development Framework<sup>1</sup>. The Framework, developed by the London Sustainable Development Commission, outlines how we can move towards the Mayor’s vision for London as a sustainable ‘World City’.

The framework is used to guide decision-making and is based around the 4Rs:

- Taking Responsibility
- Developing Respect
- Managing Resources
- Getting Results

As a consequence, this Vision and associated Action Plans have been developed with a sustainable approach in mind. Careful management of tourism development is required to:

### Spread the benefits of tourism whilst protecting local communities

The Mayor’s agenda aims to encourage visitors to enjoy ‘all’ of London rather than only the central ‘honey pots’. The distribution of visitors not only alleviates pressure on tourism hot-spots, but spreads the economic (and other e.g. civic pride, regeneration) benefits that tourism brings. Encouraging the distribution of visitors also helps to minimise the damage to the environment and infrastructure at specific hot-spots and avoids over-saturation which detracts from the visitor experience.

### Reduce energy use and local pollution

Encourage visitors to use public transport, walk or cycle to minimise their environmental impacts. Visitors should also be encouraged to adopt a ‘Reduce, Re-use, Recycle’ mentality in order to minimise their resource use during their stay. Patronage of businesses with good levels of environmental performance should also be encouraged. Overall the tourism sector should demonstrate and share best practice in the way it manages its resources and environmental impact. For example, tourist attractions in London have the opportunity to raise awareness of environmental responsibility, such as by providing recycling facilities on site.

<sup>1</sup> The London Sustainable Development Commission’s ‘Sustainable Development Framework for London’ was endorsed by the Mayor at its launch on 5th June 2003. The London Framework sets out a sustainable vision for the capital and includes a set of objectives to guide decision-making.

# Appendices

## 1. London's visitor economy

### Responding to increased consumer awareness of sustainability issues

Whilst it is important to be realistic about the balances of influence on visitors' travel decisions, research cited in the UNEP/WTO 'Making Tourism More Sustainable' guide indicates that consumers are interested in the inter-relationship between their activities as tourists and the environment and host communities, especially issues which are likely to directly affect their own wellbeing. There is 'considerable willingness' amongst visitors to pay more to support local environments and communities. This opportunity should therefore be maximised, in particular through delivery of marketing and information provision activities.

### Green, healthy London

London has an abundance of environmental assets including the Royal Parks, the River Thames, London's canals and numerous parks and open spaces that can be enjoyed for recreational and sporting activities. Ensure that all these opportunities are promoted, encouraging a wider participation in physical activity and enabling people to get healthier in London, with links to London as a sporting capital in the run up to the London Games.

### Raise awareness of sustainability issues amongst visitors

In order to encourage more sustainable visitor behaviour support should be given to encouraging visitor spending on local products, influencing visitor behaviour towards and increasing understanding of local communities, and minimising visitor damage to natural and built heritage.

### Promote regeneration

The goal of tourism development should be to address not only gaps in existing provision, but also to exploit opportunities to contribute to the Mayor's wider objectives, including social and environmental regeneration. Tourism facilities have proven to be important components of urban regeneration schemes, as evidenced, for example, along the Thames at Bankside. It is important that any new visitor facilities should be in locations well served by public transport and be sensitive to the local environment.

### Improve local understanding and access

Improve Londoners' understanding of the benefits of tourism so that a sense of pride is built amongst communities and a better understanding of the benefits that the industry brings and ensure that Londoners have access to tourist attractions.

### Improve local employment and skills

Ensure that Londoners have access to quality employment opportunities in the tourism sector and provide the skills to enable career progression.

### Ensure a balance of visitor types

Ensure a sustainable balance of visitor types by value and volume in order to avoid over-saturation which detracts from the visitor experience.

### Inclusivity

Work to ensure that London's tourism offer or marketing promotions do not have a disproportionate negative effect on some groups such as older people or certain faith groups.

### Community integration

Facilitate product development amongst London's diverse communities, in order to further integrate those communities into the tourism sector by bringing new products to market, thus generating economic and social benefits.

### Improve environmental performance

Work with tourism businesses to encourage improvement of environmental performance including efficiency of energy and resource use and improving use of local supplier networks. Highlight and share best practice, for example through green business awards. Integration with the Corporate Social Responsibility agenda may assist this process, for example around green procurement.

# Appendices

## 2. The consultation process

In June 2005, the review process for the Mayor's Plan for Tourism 2003-06 began. Stakeholders were invited to opt in to the consultation process for the new London Tourism Vision 2006-16 and London Tourism Action Plan 2006-09. An email was sent to over 1,000 stakeholders directly (e.g. Boroughs, tourism industry, sub-regional partners) inviting them to opt in. Two follow-up emails were sent as a follow up, and 291 stakeholders opted in to the process.

A discussion guide was produced as a starting point to gather feedback. The discussion guide highlighted the achievements made through the first Mayor's Plan for Tourism 2003-06 and then focussed on suggested themes going forward. The guide also outlined a number of suggested actions. Three chaser emails were sent encouraging stakeholders to give written feedback. 67 written submissions were received (23% of those opted in). Of the written submissions, 83% of respondents agreed with both the stated Vision and actions, 7% disagreed with the stated Vision and actions and 10% did not express a view either way.

The next stage of consultation was a series of five workshops held across London (Greenwich, Barnes, Hendon, Ealing and Old Street). Over 150 stakeholders (over 50% of those opted in) registered to attend these workshops. The workshops were used as a way of gathering feedback and specific comments on the way forward and were very successful.

The database of stakeholders who have opted in continued to grow. By the end of the consultation process there were almost 400 stakeholders opted in.

The penultimate draft of the Vision was subject to Health and Sustainability Impact Assessments undertaken independently.

The feedback from the various consultation stages has shaped this London Tourism Vision and the associated London Tourism Action Plan.

