KENSINGTON AND CHELSEA PARTNERSHIP
STEERING GROUP MEETING

14th November 2007

Developing a Visitor Strategy for the Royal Borough

This paper updates the Steering Group on plans to update the existing Visitor Management Strategy. **FOR INFORMATION**

1. The Current Strategy

1.2 The Council has an existing 'Visitor Management Strategy' dating from 1999

1.3 That strategy is based on a Mori study commissioned in 1996 that interviewed 1,275 English speaking visitors at 13 locations in the Royal Borough. The main findings were:

- 93% of respondents were 'repeat visitors'.
- 75% of respondents were planning to go shopping that day.
- 30% of the visitors expected to visit Harrods.
- The average spend (at 1996 values) was reported as £88 per day.

1.4 A Mori national survey in the same year reported that 1 in 5 of the British population had visited Kensington and Chelsea in the previous twelve months.

1.5 The strategy used a variety of data sources dating from 1995 and concluded:

- 1 in 3 jobs in the Royal Borough was supported by visitor expenditure.
- 1 in 5 overnight visitors to London stayed in the Royal Borough (2.6 million bed nights).
- One tenth of expenditure by visitors to London took place in the Royal Borough (£4.7 billion)
- The South Kensington museums were three of the top six most visited attractions in the UK.
- Whatever Council did, visitor numbers to the Borough would increase.

2. Why a New Strategy?

2.1 The Royal Borough plays an important role in London in providing an attractive place to live close to the centre of London for people of all income groups and the popularity of the Borough for those seeking a place to live in London has if anything, increased in the last ten years.

2.2 The Council has invested approximately £5 million in upgrading the street environment in Kensington High Street and comparable investment in other areas such as Kings Road.

2.3 The Cadogan Estate has worked hard to make Sloane Street a premier fashion retail destination and has developed a new square at the Duke of Yorks. The new Saatchi Gallery is expected to attract £1million visitors a year.

2.4 Some £850 million of investment has gone into developing the facilities of the three great museums and Imperial College and other related academic and cultural attractions in the Kensington area.

2.5 Notting Hill Carnival has passed its fortieth anniversary and although crowd numbers have probably always been talked up, visitors over the two days of the August Bank Holiday probably still exceed 500,000.

2.6 The Council has taken an interest in the retail offer in the Borough and looked to see whether specialist and interesting retail offers can be sustained and an alternative trend towards bland chain stores mitigated.

2.7 The 2012 Olympic and Paralympic Games and the Cultural Olympiad from 2008 have the potential to attract new visitors to London and to the Royal borough.

2.8 The 1999 strategy drew mostly on limited local work and figures extrapolated from other national and London surveys.

2.9 Given the changes in London and local changes and the current aspirations of the Council and its partners, it seems timely to have a further review to find out to what extent the economy and reputation of the Royal Borough is dependant on visitors.

3. What the New Strategy Will Ask

3.1 What can we find out about non-residents who shop in our shops, eat in our restaurants, use our transport systems and visit our attractions?

3.2 What can we find out about the economic contribution of these non-residents so that we can form a view about the vulnerability of these commercial and public enterprises should visitor numbers change?

3.3 Can we develop a deeper understanding of the inter-dependence between the aspirations of residents to have access to good amenities and the aspirations of non-residents whose economic contribution makes these facilities viable?

3.4 What can we learn from local commercial and public sector enterprises about:

- their current business prospects and vulnerabilities, (including access to appropriate labour)
- their relationship with the Council
- their experience of our regulatory services and of rates of business failure and start up?

3.5 Can we further survey visitors (including non-English speaking visitors) to find out more about their experiences and aspirations?

3.6 Can we survey residents to find out their attitudes towards non-residents?

3.7 Can we compare what our Council does and doesn't do to with other comparable councils such as Westminster, Camden, Southwark and Lambeth?

3.8 Can we devise a set of metrics which will enable us to know whether our visitor economy is stable, growing or in decline?

3.9 Can we come up with a pragmatic set of conclusions which will enable us to know what the Council and its partners ought to do, what it ought not to do and what we might choose to do to secure the benefits of the visitor economy whilst not eroding the quality of life for the settled population.

4. Conclusion

4.1 The Steering Group are asked to note the contents of the report and plans to update the existing Visitor Management Strategy

FOR INFORMATION

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