

**ROYAL BOROUGH VISITOR
POLICY
2009 – 2020**

I INTRODUCTION

- 1.1 This policy was written during a recession, with the pound sterling at a low level against the Euro and the dollar. While these circumstances are, we hope, finite, this policy should be able to stand apart from financial fluctuations that encourage, or discourage visitors to the Royal Borough. The policy should influence our view of visitors to the Royal Borough, their general benefit to our economy and how we might make that benefit more telling, while ensuring that the lives of our residents are not made unduly difficult in visitor hot spots.
- 1.2 The Olympic Games in 2012 offer both an opportunity to strengthen our local economy with visitor spend, and a potential burden on local residents. This strategy aims to maximise the benefit of visitors, spread their benefits across the Royal Borough and minimise their impact on residents
- 1.2 This is the Council's second visitor policy. The first was produced in 1999 by based on research by MORI and made a number of recommendations set out in an action plan.
- 1.3 A number of the recommendations were not delivered and ranged from increased signage to the possibility of a tourist information centre in central Library.
- 1.4 The strategy had 6 main objectives:
- Visitor movement
 - Visitor information, publicity and signage
 - Streetscape and environmental quality
 - Visitor accommodation and catering
 - Economic impact and new development
 - Arts, attractions and events.
- 1.5 The new policy is informed by research carried out by Acorn Consulting Partnership Ltd, specialists in tourism development and associated research. The full text of their research is attached as Appendix One to this document.
- 1.6 This policy proposes that we treat our visitor policy in three areas:
- Maximising the economic and reputational benefit of visitors
 - Making the Royal Borough more accessible to visitors
 - Mitigating the effect of visitors on residents.

2 VISITORS TO THE ROYAL BOROUGH - THE RESEARCH

- 2.1 During the latter end of 2008 Acorn Consulting carried out four surveys to help us better understand the importance to the local economy of visitors. They undertook a
- Survey of visitors
 - Survey of residents

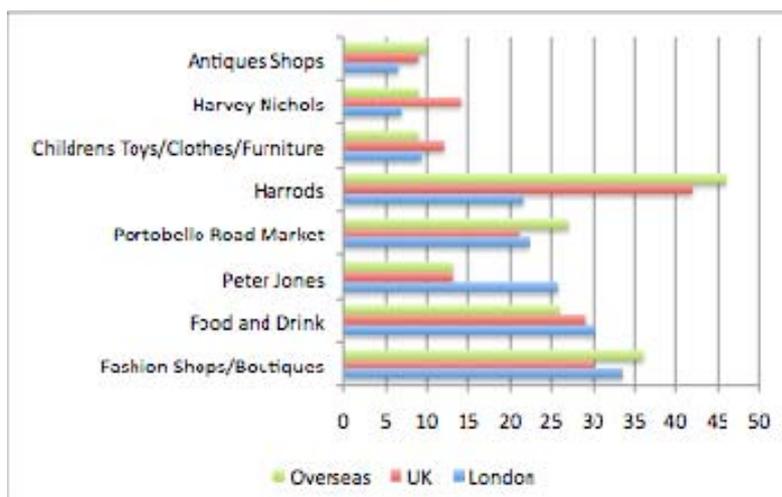
- Survey of accommodation
 - Survey of businesses
- 2.2 The visitor economy is somewhat larger than previously reported (by STEAM and LATI), and generates around £3.1 billion for the Borough, with shopping accounting for 48% (or £1.5bn) of all expenditure. UK day visitors account for 60% (or £1.4bn) of visitor expenditure, and are the most important visitor group.
- 2.3 Shopping was the most significant expenditure item of visitors to the Borough, with an average spend per day varying between £86 (UK visitors) and £100 (overseas visitors). Average spend per person per night on accommodation was between £61 and £64, making the average spend per room between £110 and £122. This compares to an average spend per room in London of £128. Overall, the average spend per day (excluding accommodation) of visitors ranged from £137 for London residents to £185 for overseas residents.
- 2.4 Average room occupancy over the 12-month period to October 2008 was 76.8%, with hotels reporting an average room rate of £159. Additional spend per person per night on hotel extras (such as telephone, laundry, etc) was £31. Overall, the accommodation sector in the Borough generates around £731 million each year from the visitor economy and employs 9,700 people. Only 11% (or 1,100) of these employees are residents of the Borough.
- 2.5 The non-commercial accommodation sector (people staying with friends and relatives) is significant. A total of 2.4 million nights are spent by visitors in the homes of residents each year, accounting for 20% of total visitor nights.
- 2.6 Shopping is by some margin the main attraction for visitors to the Borough. Visiting museums/other attractions was the second most popular reason for visiting the Borough. Fashion/Boutique shops and Harrods were the most popular shopping venues, whilst the Natural History Museum, Science Museum, Victoria & Albert Museum and Kensington Palace accounted for the majority of visits to museums/attractions. As an additional activity (not a main reason for visiting), eating/drinking was almost as popular as shopping.
- 2.7 Businesses in the Borough estimate that visitors account for between 44% (restaurants) and 90% (hotels) of their customers, and almost half of all businesses agree that visitors spend more than residents. Almost all businesses surveyed would like to attract more visitors. Almost one half of the surveyed businesses said that they had difficulty finding local employees with the right skills.
- 2.8 The majority of residents (75%) agree that the disadvantages of visitors are outweighed by their benefit to the local economy. Only 20% of residents wished that there were fewer visitors to the Borough. Visitors appear to affect the enjoyment of residents most on Kensington High Street/Kings Road, Portobello and Golborne Markets, and in the museums.

- 2.9 The Chelsea Flower Show and the Museums are enjoyed by most residents, although traffic congestion due to visitors is seen as a problem by residents. Very few residents believe that they are positively affected economically by these events. They do, however, agree that they are good for the local economy. The Notting Hill Carnival generates more negative responses than positive ones, with crowded streets, traffic congestion and noise being the key issues.
- 2.10 Research into visitor strategies in Camden, Westminster and Greenwich shows that only Greenwich has a tourism strategy, and is particularly active in attracting visitors. Greenwich has a tourism department of four staff and runs a tourism information centre with six additional staff.
- 2.11 The impact of visitors on the Royal Borough is not entirely positive. The Council's analyst had done some work on the relationship between visitors and crime. Their findings come with a health warning as they assumed that victims who gave a home address outside the London area were tourists, although a proportion of these will actually be commuters to work.
- 2.12 There were approximately 33,000 victims of crime in the Royal Borough in 2008/09, if 9% of these were tourists, that would be about 3,000 individuals. The way the Police record information means that there is often more than one victim for some crimes, giving a discrepancy between the number of victims and the number of actual crimes recorded at around 21,000. About 600 perpetrators of crime (2%) are shown with addresses outside London.
- 2.13 There is very little intelligence about crimes that visitors commit. In relation to crimes that visitors suffer it does very much depend on where in the borough they visit. The clearest information is that visitors coming to the main tourist attractions need to be aware of pick pockets and snatch offences. This is especially the case in and around South Kensington and the museums and Portobello Road at the weekend. Visitors are also often the subject of beggars especially at high-profile locations, e.g. Harrods.
- 2.12 The full visitor research document is attached as appendix I to this policy.

3 MAXIMISING THE BENEFIT

- 3.1 The research that underpins this policy shows that our retail sector and our institutions are dependant on visitors. Most visitors come here to shop, and while Harrods is the most popular shopping destination, fashion and the Portobello market are also significant attractants. Figure I below shows the shops and types of shops visited by category of visitor

Figure 1



- 3.2 The Commission on the retail sector concentrated on the relationship of our retail sector to our residents, but without visitors many of our treasured shops would not be viable.
- 3.3 Visitors to the Royal Borough do more than shop. The second most popular reason for visiting the Royal Borough is visiting museums and visitor destinations.
- 3.4 Visitors to the Royal Borough stay with our residents and in a variety of hotels. Those hotels could be a significant local employer with around 9,700 jobs, but at present the local workforce only makes up 11% of that workforce.
- 3.5 This policy recommends that the Royal Borough:
- Explore the feasibility of promoting local shopping to overseas visitors and London shoppers through print, and web based and mobile technologies
 - Use the 2012 games to promote the Royal Borough as a shopping destination using print, web based and mobile technologies
 - Consider the feasibility of a programme of skills training and job placement in partnership with local hotels
 - Explore the possibility of targeted promotion of the Royal Borough's hidden visitor assets through print, and web based and mobile technologies

4 NAVIGATING THE ROYAL BOROUGH

- 4.1 Some visitors find it difficult to navigate the Royal Borough, and they may tend to navigate along well trodden routes. Some visitor attractions feel that they miss out on visitors because their particular attraction is not signposted.

- 4.2 Our streetscape policy drives us towards clutter free streets with the minimum of signage so we might want to explore creative ways of helping visitors to navigate the Royal Borough and explore off the beaten path between Harrods and the natural History Museum.
- 4.3 The majority of hotels in the Royal borough are not part of a hotel grading scheme. This means that they will not be promoted by visit London. If the Council wants to encourage visitors to stay in the Royal Borough we may want to promote and group local hotels in a visitor website. Our current website does not even list visitors or tourists in the A – Z directory, though it does list hotels, but does not allow one to search by price or category or location.
- 4.5 This policy recommends that the Royal Borough:
- Build a website to provide information to visitors on hotels, shops and other attractions, allowing visitors to search by category, interest and price, allow recommendations and comments, maps and links to other useful sites.
 - Offer special deals to visitors that are only available through the website (preferential ticket deals at Opera Holland Park for visitors who book at a particular hotel via the website, or vouchers for discount shopping available on the website)
 - Link major events to visitor attractions and shops that may have similar markets. For instance we might want to link the Chelsea Flower Show to nearby flower shops and nurseries, as well as restaurants and shoe shops.
 - Develop an interactive navigation system for the Royal Borough that will give personalised information to visitors through a website using GPS downloadable through mobile phones linking to existing GPS info systems.

5 MITIGATING THE EFFECT

- 5.1 While the research showed that the majority of residents (75%) agreed that the disadvantages of visitors were outweighed by their benefit to the local economy, there are disadvantages to living in such a popular visitor destination.
- 5.2 In particular some residents feel crowded out of the visitor hot spots of Kensington High Street/Kings Road, Portobello and Golborne Markets, and the museums. While the Council already does much to maintain high use streetscapes and balance the needs of residents with those of visitors we might want to look again at how we champion the needs of residents while keeping the economic benefit of visitors.
- 5.3 Information and stories about visitors to the Royal Borough and the worth of their spending, particularly during a recession, might help to reassure residents about the worth of visitors. The very things that our residents

value; the shops, parks and atmosphere of the Royal Borough, are the things our visitors most enjoy.

- 5.4 Businesses in the Borough estimate that visitors account for between 44% and 90% of their customers. Almost all businesses surveyed would like to attract more visitors. Our businesses shape the residential nature of the Royal Borough and need visitors to survive.
- 5.4 It might be useful then, not to think of a conflict between residents and visitors (after all 20% of visitor night stays are spent with friends and family in the Royal Borough), but of a balanced relationship where the Royal Borough shares the benefit of visitors with our residents.
- 5.5 2012 will present some particular challenges. High profile events, a venue in the Royal Borough and externally directed infrastructure management may stress residents' tolerance.
- 5.6 This policy recommends that the Royal Borough:
- Support Friends organisations to seek out visitors and tourism opportunities
 - Run at least 4 stories each year on the shared benefit of tourism for residents: Local schools benefiting from the Saatchi gallery; visitors and shopping; employment opportunities in hotels, the Chelsea Flower Show and local shop displays etc etc.
 - Provide web information and a newsletter to residents' associations on the resident friendly mitigation for major events
 - Support resident open evenings at major visitor attractions
 - Ensure that all event traffic management and event management plans include residents' interests.

3 year Action plan with associated costs

		20010/11	2011/12	2012/13	TOTAL COST
1	Explore the feasibility of promoting local shopping to overseas visitors and London shoppers through print, and web based and mobile technologies City Centre Manager/ICT Web Developer	Develop costed 2 year action plan Already partly achieved through Only in London Campaign	Deliver year 1 of plan	Deliver Year 2 of plan	£15K
		£0	£10K	£5K	
2	Use the 2012 games to promote the Royal Borough as a shopping destination using print, web based and mobile technologies 2012 Co-ordinator/City Centre Manager/ICT Web Developer	Develop costed 3 year action plan	Deliver Year 1 of plan	Deliver Year 2 of plan	£10K
		£0	£5K	£5K	
3	Consider the feasibility of a programme of skills training and job placement in partnership with local hotels Head of Regeneration	Produce feasibility study. If agreed, develop costed action plan	Deliver Year 1 of plan	Deliver Year 2 of plan and assess	£10K
		£0	£5K	£5K	
4	Explore the possibility of targeted promotion of the Royal Borough's hidden visitor assets through print, and web based and mobile technologies Director of Culture and Leisure/ICT Web Developer	Develop costed action plan	Deliver Year 1 of plan	Deliver Year 2 of plan	£10K
		£0	£5K	£5K	

		2010/11	2011/12	2012/13	TOTAL COST
5	Build webpages to provide and link to information to visitors on hotels, shops and other attractions, allowing visitors to search by category, interest and price, allow recommendations and comments, maps and links to other useful sites. ICT Web Developer	Describe project. If agreed build webpages £50K	Continue to develop and monitor use £10K	Finalise development and monitor use £5K	£65K
6	Offer special deals to visitors that are only available through the website Director of Culture and Leisure/ICT Web Developer	Develop deals for implementation in summer 2010 £0	Offer deals and monitor takeup £0 contained in operational budgets	Repeat if justified £0 contained in operational budgets	£0
7	Link major events to visitor attractions and shops that may have similar markets. For instance we might want to link the Chelsea Flower Show to nearby flower shops and nurseries, as well as restaurants and shoe shops.		Develop content for website £0	Develop content for website £0	£0
8	Develop an interactive navigation system for the Royal Borough that will give personalised information to visitors through a website using GPS downloadable through mobile phones linking to existing GPS info systems.		Develop and implement links £50K	Monitor usage £0 contained in operational budgets	£50K
9	Support Friends organisations to seek out visitors and tourism opportunities		Develop programme £0	Roll out support £0	£0

10	Run at least 4 stories each year on the shared benefit of tourism for residents: Local schools benefiting from the Saatchi gallery; visitors and shopping; employment opportunities in hotels, the Chelsea Flower Show and local shop displays etc etc.		4 stories in local publications	4 stories in local publications	£0
			£0 contained in operational budgets	£0 contained in operational budgets	
11	Provide web information and a newsletter to residents' associations on the resident friendly mitigation for major events		Info on web and appropriate newsletters distributed	Info on web and appropriate newsletters distributed	£0
			£0 contained in operational budgets	£0 contained in operational budgets	
12	Support resident open evenings at major visitor attractions	1 event	2 events	2 events	£20K
		£5K contribution to host	£10K contribution to hosts	£5K contribution to hosts	
13	Ensure that all event traffic management and event management plans include residents' interests.	Resident's interests promoted to event organisers	Requirement for consultation included in event plans	Requirement for consultation included in event plans	£0
		£0	£0	£0	
TOTAL ONE-OFF FINANCIAL REQUIREMENT		2009/10	2010/11	2011/12	£180k
		55k	£95k	£30k	

APPENDIX I

THE RESEARCH