

## Tourism in outer London

December 2006





## **Tourism in Outer London**

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**Greater London Authority  
December 2006**

**Published by**

Greater London Authority  
City Hall  
The Queen's Walk  
More London  
London SE1 2AA

**[www.london.gov.uk](http://www.london.gov.uk)**

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ISBN 10: 1 85261 970 8

ISBN 13: 978 1 85261 970 1

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## Tourism in outer London Chair's Foreword



Tourism is a major part of London's economy. It brings not only income and jobs, but also increases the number of cultural and leisure facilities available to resident Londoners. However, these benefits tend to be concentrated in central London while outer London is often neglected.

We must be realistic about this. The major attractions that draw tourists – especially first-time visitors – are mostly the iconic landmarks such as the Tower of London and Buckingham Palace, or significant galleries and museums such as the British Museum and the National Gallery, or the best-known shopping streets such as Oxford Street and Knightsbridge.

But there is no reason why tourists should not also visit and enjoy such first-rate attractions as the Richmond riverfront and Hampton Court Palace, Woolwich Arsenal and the Dulwich Picture Gallery, or Hampstead Heath and the new Wembley Stadium.

One London borough hit the nail on the head when it commented that we are talking here about marketing 'hidden gems' rather than the 'crown jewels'. In addition, the 2012 Olympic Games will bring international attention to parts of London less well known to tourists, such as Greenwich and Docklands.

Given that the current level of tourism in many outer boroughs is insufficient to sustain discrete marketing campaigns for each borough, we must think instead of how we can organise London-wide marketing so as to disperse visitors more widely across the capital. The attractions of central London will probably always take pride of place but promotional efforts should not focus exclusively on them.

This report suggests practical ways of presenting a more complete view of London to the prospective visitor, to help spread the benefits of tourism more widely. In particular, there is much that Visit London and the London boroughs can do to develop co-operation. The report also considers the important question of improving visitor accommodation throughout London.

There remains much consultation and exploratory work to do. But we must make concrete progress otherwise the tourism opportunities presented by the 2012 Olympics may be lost.

A handwritten signature in black ink, appearing to read 'Dee Doocey', with a stylized flourish at the end.

**Dee Doocey AM**  
**Chair of the Economic Development, Culture, Sport and Tourism Committee**

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## **Executive Summary**

Tourism is of tremendous importance to London, accounting for ten per cent of the capital's economy and promoting Londoners' quality of life by supporting leisure and cultural facilities.

However, the large majority of tourism activity is concentrated in a relatively small area of central London. This concentration restricts the benefits that tourism could bring to many Londoners living and working in the suburbs and the outer areas of the capital.

This report emphasises the importance of encouraging tourists and other visitors to use accommodation, attractions and other facilities beyond the small central area. It looks at the policies and actions that have been put in place by tourism promotion agencies and departments in London in recent years, especially those that have been aimed at encouraging visits to outer London. It finds that there has been considerable activity, but that there is still greater promotion of the well-known central area. It finds that there is strong demand from outer London for more help and resources. It also finds a matching demand from London-wide agencies for a stronger response from the outer boroughs.

The report also seeks to identify further ways in which the agencies responsible for promoting tourism in London can more effectively spread the benefits of tourism further across the city. It recommends a shift of resources within Visit London to promotion of attractions in outer London, identifying some specific ways in which this could be achieved. It also recommends that both Visit London and the outer London boroughs should increase their efforts to work together, giving the necessary resources to make this effective.

Finally, the report considers the different aspects of the 'visitor offer' – all the attractions and facilities that an area has for visitors, such as hotels, leisure activities and tourist attractions, shops, restaurants, transport and the physical environment. It argues that, to improve tourism in an area, these features need to reinforce each other. It recommends that the London Development Agency's sub-regional tourism strategies should reflect this principle and seek to match the need of one part of the industry with an opportunity for another part.

## Introduction

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*"Distribution of tourism across London is uneven, preventing many of London's outer areas from sharing the in the benefits that tourism brings."*

Visit London: the Mayor's Plan for Tourism in London 2003-2006

Tourism in London is a huge generator of jobs and wealth and is a key part of the city's economy, accounting for around 10% of GDP<sup>1</sup>; total tourism spending in London amounts to £15 billion each year<sup>2</sup> and the sector employs 350,000 people<sup>3</sup>. Tourism also benefits local residents by supporting the vast range of cultural and leisure opportunities that London offers. However, the vast majority of visitor activity and spend takes place in a few square miles of central London. This concentration reduces the opportunities for businesses elsewhere in London.

Numbers of visitors to London generally rose through the 1990s and peaked in 2000 with over 30 million visits. Following the terrorist attacks of 11 September 2001 there was a sharp decline, with further falls in 2002 and 2003. Since then, the numbers of visitors to London have been approximately steady at something over 25 million visits per year (higher than pre-1996 levels). The overall visitor spend has been increasing over the period 2002 to 2005 (from £8.6m to £9.0m) and according to Visit London projections is set to grow again (to £9.8m in 2007)<sup>4</sup>. With the forthcoming 2012 Olympic and Paralympic Games to be held in London, a major boost to visitor numbers and London's domestic and international profile is expected. It is therefore helpful that the main Olympic site at Stratford, and other venues such as Docklands, Greenwich, Wembley, Wimbledon and Woolwich are in 'outer London'<sup>5</sup> locations.

The Mayor of London published his Tourism Plan, Visit London, in 2002. This plan outlined a new structure and strategy for tourism promotion. The London Development Agency, as part of its role promoting business and jobs, is the Mayor's agency for developing tourism and the visitor economy. Its key delivery partner is Visit London, the official tourist organisation for the capital (under the pre-2002 structure Visit London existed under the name of the London Tourist Board, but it regards its current relationship with the Mayor as a 'sea change' in political and practical support). The London Development Agency has now produced the Mayor's London Tourism Vision 2006-2016, and a London Tourism Action Plan 2006-2009.

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<sup>1</sup> Visit London: The Importance of Tourism in London, based on figures from GLA Economics and London Development Agency.

<sup>2</sup> Visit London: The Importance of Tourism in London.

<sup>3</sup> Visit London: summary of business plan 2004-05

<sup>4</sup> Visit London: Prospects for 2006, based on International Passenger Survey, UK Tourism Survey and Visit London forecasts.

<sup>5</sup> 'Outer London', for the purposes of this report, means London outside of the rather small central area in which tourist activity is most concentrated.



A key principle of the Mayor's 2003-2006 strategy was 'dispersal'. That is, spreading visitors beyond the established attractions and accommodation of central London into previously lesser-known locations in other parts of the capital. This is to enable more Londoners to benefit economically from tourism, and to make the most of what London has to offer to attract more visits, especially repeat visits from those who are already familiar with the iconic attractions of central London.

Recognising the importance of this principle, the London Development Agency has created a sub-regional structure, dividing London into: North, South, East, West and Central. In each sub-region, the London Development Agency has devised a sub-regional strategy and action plan and works with a sub-regional agency<sup>6</sup> to deliver it. For each sub-region, the London Development Agency has appointed a sub-regional manager. With this structure established, dispersal is less prominent in the 2006-2016 Vision, but The Vision acknowledges 'the need for more sub-regionally focussed working to improve the spread of tourism benefits' and there remains an objective 'to encourage the distribution of visitors throughout London', with a target to increase the number of visitors to outer London, by percentages to be specified on an annual basis. The current Action Plan says that the London Development Agency will 'build on the sub-regional network programme to continue distributing visitors across London'.

The sub-regional working was welcomed by many stakeholders<sup>7</sup> and the principle of the strategies, especially dispersal of tourists beyond central London, was strongly supported.

However, we heard concerns from a number of stakeholders that the sub-regional strategies were not being successfully implemented. Some<sup>8</sup> felt that this was due to the strategies being at an early stage.

Since the hearing the London Development Agency has told us of progress in implementing these strategies. By late 2005 each of the sub-regional Tourism Development Manager posts had been filled. The 'positioning guides' (documents assisting local marketing efforts) for each of the outer London sub-regions have been produced in 2005/06 or 2006/07, and work has begun to promote and distribute these guides. Sub-regional advisory groups have begun to engage local stakeholders and specific marketing initiatives are being undertaken. Visit London have also told us of recent projects such as the borough A-Zs<sup>9</sup> (6-page leaflets highlighting attractions and the economic significance of tourism in each London sub-region, and targeted at local decision-makers).

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<sup>6</sup> North London Limited, South London Business, Tour East London, West London Business and Central London Partnership

<sup>7</sup> including English Heritage, the Bed & Breakfast and Homestay Association and several borough councils.

<sup>8</sup> the London Borough of Bromley and the Historic Royal Palaces, as well as the Greater London Authority

<sup>9</sup> [http://corporate.visitlondon.com/facts\\_figures/latest\\_statistics/boroughs.html](http://corporate.visitlondon.com/facts_figures/latest_statistics/boroughs.html)

In contrast, other contributors<sup>10</sup> felt that there was not enough resourcing behind the strategies for them to be successful in the end, or that the approach was wrong. We welcome the recent progress but note that it has taken a matter of years to put in place these fundamental elements of the sub-regional marketing strategy.

This review sought to find ways to promote tourism in outer London more effectively and to deliver on the objective of spreading the benefits of tourism by dispersing visitors around the capital.

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<sup>10</sup> the London Boroughs of Croydon and Greenwich

## Balance of resources and publicity

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*"Central London and other high-profile areas have clearly benefited from the exposure of their products on the Visit London website and in glossy marketing campaigns. However, very little of this has percolated down to those outer London boroughs that have less obvious visitor attractions but a greater need for assistance."*

London Borough of Croydon

The tourism promotion work of the London-wide bodies is too focused on central London to achieve the aim of dispersal of visitors across London. Overall, the promotion of outer London attractions and areas is not effective enough and the effect is inequitable, supporting established tourist destinations while failing to engage with areas seeking to develop their visitor economy.

More than half the councils that gave us views and information said that tourism strategy or promotion was too focused on central London or that it did not work effectively in their area.

*"All of the LDA and Visit London's time and effort is focused on central London."*

London Borough of Redbridge

*"We are particularly concerned that currently promotional campaigns are aimed almost exclusively at central London destinations."*

London Borough of Hillingdon

*"If Visit London... are committed to their goal of dispersal, then resources have to be placed where they are most required... towards marketing for 'hidden gems' rather than crown jewels."*

London Borough of Bromley

*"The current level of tourism is such that it is uneconomic to market the offer for a borough on its own. We believe the London Development Agency and Visit London should consider increasing the level of funding devoted to marketing outer London tourism."*

London Borough of Havering<sup>11</sup>

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<sup>11</sup> These boroughs have locations on the edges of London. They have attractions including large areas of protected countryside, woodland and country park; museums; shopping centres; theatres; picturesque villages, churches and pubs; and the UK's proposed World Heritage Site for 2006 at Down House in Bromley.

We did hear from London-wide agencies such as Visit London, the London Development Agency and the Greater London Authority about their work, such as the sub-regional strategies from the LDA and Visit London's marketing and promotional work on outer London attractions.

Visit London emphasised very strongly their commitment to promoting all of London, and described for us how they are seeking to promote lesser-known sites and to encourage Londoners to make more use of their city. They described their work with the sub-regions to produce 'positioning guides' to inform future marketing of the sub-regions, and support for councils and others in the sub-regions in skills and tools for marketing. They have told us of their promotional work through the website, leaflets, newsletters, and other material to promote tourism, including promoting outer London attractions, and provided samples of these promotional materials. Several councils<sup>12</sup> told us positively about their work within the sub-regional strategies to promote tourism in their areas.

Visit London told us that they spend around £0.5m per year on guides such as 'Go London' and 'Get Out There', which were intended to promote attractions in outer London. However, these guides themselves still have a central London bias – for example, the Eat London guide (part of the Go London series) gives 19 pages to central London, and in total 22 pages to north, south, east and west London, with the coverage of the 'outer' areas being predominantly of locations in zones 1 and 2. Also, this £0.5m did not represent a large proportion of the Visit London funding (which in 2005 was approximately £19m from the London Development Agency and £7m from other sources)<sup>13</sup>. Since the hearing in September 2005, Visit London have told us of further work that they have done to advertise outer London. In summer 2006 this included an advertising campaign for attractions on the River Thames. This mentions sites from the Thames Barrier to Twickenham. The river is a major asset for some destinations outside central London as it provides a tourist-friendly transport artery linking central London to attractions further out, including the major clusters of heritage and green space attractions at Greenwich and around Kew and Richmond, each of which features a World Heritage Site.

We recognise that Visit London is working to promote outer, as well as central, London. However, the evidence of councils overall and our own assessment of the content of the promotional material we have seen suggests that there is a general emphasis on central London that undermines the principle of dispersal of visitors. When promoting 'London', the main imagery tends to be well-known attractions in central London<sup>14</sup>; when promoting specific locations, the locations mentioned include outer London locations, but the concentration of locations is overall greatest in the centre. The overall effect leaves many stakeholders convinced that outer London is under-

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<sup>12</sup> Barnet, Kingston and Waltham Forest, whose attractions include the RAF Museum at Hendon, Chessington World of Adventures, Hampton Court Palace and the William Morris Gallery

<sup>13</sup> Visit London

<sup>14</sup> London Borough of Croydon, whose attractions include 4-star luxury country house accommodation, the base of the acclaimed London Mozart Players and the award winning Lifetimes museum at the Clocktower.

promoted. Visit London themselves said “there is no doubt that even more could be done with additional resources, particularly to promote lesser known attractions to a domestic audience.”

As we have heard from Visit London, their promotional strategy is different for different markets. In markets that are less familiar with London initially, such as long-haul international markets, current work focuses on the globally-recognisable icons of London and similar attractions, with the aim of increasing interest in coming to the city at all. The main markets for promoting a more complete view of London’s attractions, including outer London areas, are with Londoners themselves, visitors from elsewhere in the UK, and near European markets who may already know enough of the main London features and may be most likely to make repeat visits to different parts of London.

Visit London operates a model for estimating the economic benefit from planned or completed promotional campaigns. When planning spending on promotion, activities must be expected to achieve certain ratios of economic benefit to marketing spend. There is a different ratio required for promotion to the domestic market than for promotion to the international market – promotion to the domestic market must be expected to achieve a return of £3-4 economic benefit for every £1 spent, whereas promotions to the international market must be expected to achieve much higher returns - £30 per £1 spent. The reason for this different return requirement is that international visitors typically spend much more money per visit.

A relatively simple and rigid criterion such as this will, if it conflicts with the aim to promote tourism in outer London, take precedence. This may prevent or reduce the promotion of outer London attractions to the international market, including the relatively close European markets that Visit London identifies as potential targets for marketing outer London.

The criteria should be made more flexible to reflect the priority that should be given to the aim of dispersing visitors.

**Visit London’s resources are focused too much on central London.** Though Visit London have told us about the work they do with and for outer London, it is clear from other evidence that this is not enough. Therefore, in line with the strategic priority of dispersal and monitored by Visit London’s systems for tracking the promotion of the various areas, there should be a shift of resources towards promoting outer London.

*Recommendation 1*

**Visit London should set and monitor targets to increase the resources devoted to promoting tourism in outer London, covering:**

- **the proportion of financial resources devoted to tourism in outer London**
- **the proportion of the coverage given to outer London in promotional material, including that aimed at the international visitor**
- **the information available on the Visit London website about outer London attractions and facilities**

**To enable this shift, within the existing process for allocating resources by economic return, Visit London should set lower return thresholds for the marketing of outer London than for central London, in line with the stated aim to disperse visitors across the capital.**

We are aware that the Budget Committee has investigated the GLA Group spend on tourism and made recommendations on ways of measuring economic return from marketing activities. If the resource allocation process should change as a result then we would hope that Visit London heed the spirit of our recommendation and seek to reflect in their procedures all aspects of their strategy including the principle of dispersal of visitors.

Several of Visit London's promotional campaigns are undertaken with partners, such as tourist attractions, who pay Visit London to help resource the activity. Attractions must therefore decide whether to participate in these activities based on the commercial benefit they expect and the cost that they must pay to Visit London (which is assessed according to a different formula for each tourism sector, typically based on a measure of size such as visitor capacity or number of staff). Some attractions told us that they found the cost-benefit balance to be unfavourable in comparison with other advertising channels and so did not participate or participated only to a limited extent (for example, signing up only one site out of several across London<sup>15</sup>). This may be particularly true of outer London attractions.

Visit London has told us since the hearing that they are increasing the proportion of their partner organisations located in outer London; in 2004, 29% of partners were in outer London, and by 2006 this had increased to 34%. For the most recent quarterly figures, nearly half of new partners were in outer London.

Because Visit London's activities are partly driven by these paid-for partnerships, the concentration of partners in central London reinforces the concentration of Visit London's activity there.

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<sup>15</sup> English Heritage told us they had subscribed one central London site to remain in contact, but did not subscribe their other sites including outer London attractions such as Chiswick House, Eltham Palace and Down House.

*Recommendation 2*

**Visit London should review the pricing of their advertising and partner status, to ensure that they continue to attract more outer London attractions into partnership and help the shift of resources to promoting outer London.**

For example, there could be a discount for outer London attractions or, where the formula does not reflect revenue, this could be taken into account.

## Working with boroughs

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The development and promotion of tourism in outer London must involve the borough councils, as strategic leaders for their localities. However, they require support and advice from those at the London level who have expertise in the visitor economy and resources to develop and promote it. The partnership between these two levels is therefore crucial and we have identified perceived barriers at both ends.

*“Many challenges remain where boroughs do not have a dedicated Tourism Officer or have limited resources invested in either the development or promotion of the area as a visitor destination.”*

Visit London

The London Development Agency has its sub-regional managers and works with sub-regional delivery agencies for tourism. Visit London have a ‘borough champion’ to help them link with boroughs in their work. All of these seek to engage with boroughs, and they ask each borough to identify a tourism contact officer. However, not every borough has an individual to play this role, and many of those that do place the role alongside other functions such as culture, rather than allocating a full-time post exclusively. Some of the officers working on tourism noted that they did not have a cash budget with which to commission extra work or promotion.

Visit London identifies that, in some boroughs, this lack of a contact point, lack of information provided to Visit London, or more general failure to invest local resources in tourism, is an important difficulty hindering the promotion of tourism in outer London. And we have heard similar points from the opposite perspective – some boroughs told us that, because they didn’t have a dedicated tourism officer or budget, they sometimes found it difficult to engage with tourism promotion agencies.

However, we received views from a number of boroughs that suggest they find some difficulties even where they are giving resources for tourism work. Harrow were generally positive but said they had limited input to Visit London publications and could not correct inaccurate information that had been published. This point was echoed by Greenwich, and Croydon and Bromley similarly felt there should be longer to respond to requests for information or opportunities to participate in promotional activity. Some boroughs said to us that the resource they give to tourism is spread between different departments rather than being concentrated in a single point of contact, and that Visit London and other agencies did not effectively engage with this distributed tourism role.



*“Through Visit London, the LDA needs to develop stronger links with individual outer London boroughs and engage more with local issues... For instance, it might consider allocating designated officers to each outer London borough to ensure that providers are kept abreast of developments and Visit London understands the issues at local levels.”*

London Borough of Croydon

If the development and promotion of tourism in outer London is to be improved, **there must be effective working between London-wide agencies such as Visit London and the local boroughs concerned**. We can identify scope for further efforts in this direction within boroughs and also within Visit London. Improvements on both sides could be mutually reinforcing as the benefits of the partnership become more apparent. We recognise the independence of boroughs from the Greater London Authority and its family of organisations, but we would urge them to consider carefully our recommendation and the benefits to be gained from working effectively with wider bodies that promote the visitor economy.

*Recommendation 3*

**Outer London boroughs should appoint or designate a specific tourism contact with whom Visit London and other tourism bodies can engage.**

*Recommendation 4*

**Visit London should more effectively engage with boroughs and other local bodies by:**

- **expanding the number of staff liaising with boroughs**
- **providing materials to demonstrate to local councils, particularly Members, the benefits of tourism and investment in promoting it**
- **allowing boroughs more time to respond to consultations and giving boroughs the opportunity to verify information in promotional material before publication**

## Quality of visitor accommodation

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We have heard repeatedly of the importance of accommodation as part of what London offers visitors and tourists. This is particularly important in outer London, where not just the quality but in some areas the supply of hotel, bed and breakfast (B&B) and other visitor accommodation is a limiting factor in the development of tourism there.

*"Accommodation in which the London visitor stays forms a huge part of their experience of London as a destination... London is perceived as an expensive destination that also provides poor service."*

*"We carried out a pilot business support project to look at what areas we needed to engage with around quality and the answer was obviously accommodation."*

London Development Agency

The Mayor's Visit London tourism strategy for 2003-2006 identified the need to improve the supply of hotels in outer London and to ensure their quality. His 2006-2016 Vision also sets the key objective to 'improve the quality of accommodation and visitor perceptions of value for money'. The London Development Agency and Visit London told us that it is their priority to ensure that 80% of London's accommodation is in the National Quality Assurance Scheme by 2010. This is to be achieved through a business support programme and an incentive will be supplied from 2007 by a policy of accepting as partners only accommodation that is in these schemes<sup>16</sup>. This strategy is in line with the approach of Visit Britain.

To support these strategic aims, the London Development Agency and Visit London are compiling a database of all visitor accommodation in London, which is expected to be completed as this report is published. We look forward to the completion of this important strategic tool and will enquire about its completion and use as part of our follow-up work to this report.

The importance of hotel accommodation to tourism is mirrored by the importance of tourism to the hotel sector. We heard that hotels now seek to occupy their rooms seven nights a week, and therefore cannot rely on business travellers but must also draw customers from the leisure market<sup>17</sup>. This complementary weekend business is particularly likely to come from the short-haul or domestic tourism market which, as we have seen, is the key market for promoting outer London. We also heard from the bed and breakfast sector that the local tourist economy is vital to them<sup>18</sup>.

The British Hospitality Association made it clear to us that quality monitoring (such as under the National Quality Assurance Scheme) could not by itself drive up quality.

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<sup>16</sup> London Tourism Action Plan 2006-2009, Key Action 2.2.1

<sup>17</sup> Accor Hotel Group

<sup>18</sup> Tourism Concern

Investment is necessary and this has to be driven by demand in the visitor market. Therefore an improvement in hotel quality had to go hand in hand with people being more keen to stay in the hotels and to pay the prices that give a return on the investment in quality. The demand for people to stay in a given place is clearly influenced by what visitor attractions are in that area or within daily travel of that area, and how well aware visitors are of them. **Everything an area offers to visitors, including the local attractions and transport, is crucial for the sustained improvement of accommodation quality and supply.**

## **The whole 'visitor offer'**

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We saw that for improvements in visitor accommodation, and the visitor economy in general, visitors must have places to stay and attractions to go to, within easy reach of each other. To a considerable extent this exists in central London and a few other tourist hotspots, but it must be at the centre of tourism development and promotion in most parts of outer London.

*"If you want to spread business around, you must have accommodation in the right place, you must have transport routes that can move people around, and visitor attractions for people to go and do."*

Bob Cotton – Chief Executive, British Hospitality Association

There is a danger, for any area wishing to develop its visitor economy from a low base, of being caught in a low-tourism cycle. Few tourists means little money to invest in visitor accommodation so more tourists don't come because there is nowhere for them to stay. And likewise few tourists means little money to invest in visitor attractions so more tourists don't come because there is nothing for them to do.

One way out of this trap is to take advantage of accommodation or attractions in another area. As well as local attractions such as Rainham Marshes and Conservation Park, and Rainham House, Havering seeks to promote itself as a base from which to explore London and the nearby areas. The promotion by Visit London and others of visitor attractions, shops and restaurants beyond the centre will often rely on visitors staying in central hotels and making day trips out. A cluster of attractions and other facilities in an area can be particularly successful at this, as in Greenwich or Richmond, but individual attractions that are within easy reach by Underground or rail links can also be destinations for trips out of the centre. London has renowned museums, galleries and other attractions in its suburban zones such as the Horniman Museum in Forest Hill, Syon House and Gardens at Brentford, the Dulwich Picture Gallery, and a range of museums in the East End such as the Geffrye Museum, the Ragged School Museum and the Bethnal Green Museum of Childhood. London's international sporting venues can also attract visitors from all over the world to make a journey out of the

centre, from Wimbledon and Twickenham to the much-anticipated new Wembley Stadium.

However, the relationship between central London and outer areas in this way is dependent on transport links that are quick, easy and inexpensive, and that visitors perceive as such.

*"Investment in key attractions in London (eg London Eye and Tate Modern), free entry to national museums and increased marketing by Visit London have increased domestic activity and demand... The improved bus service and introduction of the congestion charge have improved the ability to travel quickly and cheaply around London. However, transport to hostels and locations outside the central tourist area is perceived by our customers to be difficult and time consuming."*

Youth Hostel Association

Contributors, from borough councils to hoteliers, stressed to us the importance of transport links. Transport for London told us of their work, not only to provide an efficient transport service but also to make visitors aware of how they can use it to reach tourist destinations. They work in partnership with Visit London. Visit London likewise give transport maps in some of their promotional material, and theme some of their work around the river, which is a particularly tourist-friendly transport corridor as is shown by the success of riverside tourist attractions. We also heard of the importance of car parking in parts of outer London where the public transport network is less densely connected.

To establish a positive reinforcement between accommodation and attractions, instead of the negative cycle described above, the two can grow in parallel. This can be the goal of a local or sub-regional visitor strategy. Improvements in one aspect of the visitor offer can help overcome barriers to the development of another – thus a local tourism sector can grow as a whole, both supply and demand. For example, the London Borough of Hillingdon outlined to us their aim to encourage visitors staying in the borough's hotels to spend more time and money elsewhere in Hillingdon.

There are other important aspects to a local tourism strategy. The marketing must be realistic and effective, and other council departments have contributions to make. Of key importance is the development control function. We heard how some local planning authorities had unrealistic expectations of the type of hotel that can be sustained in their area, turned down developers wishing to set up more modest hotels, and prevented any hotels being developed in their area<sup>19</sup>.

The British Hospitality Association stressed the importance of other local contributions to the visitor offer, such as street cleaning and community safety. It is clear that there

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<sup>19</sup> Accor Hotel Group and the London Development Agency

are many aspects to a successful local visitor strategy and that local authorities are key partners in developing these strategies.

Local authorities' resources for tourism development are clearly limited, though we have recommended that they should at least identify officers to act as a contact for tourism. Also visitors do not stay within local authority boundaries and are usually unaware of them. The attractions and accommodation in a given area of outer London are likely to cater to visitors who also go to central London, neighbouring outer boroughs, and perhaps non-London areas. Strategic links such as transport infrastructure need to work across borough boundaries. Therefore, there is a need for sub-regional strategies to support and work with local tourism plans, where they exist. Sub-regional strategies also need to reflect the holistic development of the visitor offer, and reflect the contribution of local authority services and transport.

The London Development Agency supplied us with copies of the outer London sub-regional strategies, and these factors are reflected in them to some extent. In particular the east London strategy clearly includes accommodation, attractions and transport. Some other strategies include some of these, but there is overall more emphasis on marketing and partnership building in these early strategy documents. **It is important for the sub-regional strategies to support the development of the visitor offer more completely.**

The right strategy can seek to generate realistic and positive expectations, and guide the industry and local authorities in delivering supply and quality of accommodation, as well as other important parts of the visitor experience such as transport, planning, licensing, environmental services, etc.

#### *Recommendation 5*

**The London Development Agency must use its sub-regional tourism strategies in each area of London to support the local tourist sector as a whole. To do this, it must identify the needs and opportunities in accommodation, attractions and other aspects of the visitor offer, and show how the development of each facility and attraction can support the others.**

We were informed by at least one attractions operator<sup>20</sup> that there are plans to market associated outer London attractions jointly as 'clusters'. Though there is not currently clear evidence that this approach is more effective than others, it would be valuable if attractions that do use this approach could share with Visit London and/or sub-regional partnerships their evaluation of its effectiveness.

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<sup>20</sup> Royal Parks

## **Conclusion**

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The principles of the strategies to promote London tourism and in particular to disperse visitors to outer London attractions are important for London and widely supported. However, there is still much work to be done on implementing these strategies and in strengthening the arrangements for work between outer London boroughs, the tourist industry and London-wide tourism agencies. The development and promotion of the outer London visitor offer must continue to improve as it has done since 2002.

In particular, outer London must be able to take full advantage of future opportunities such as the London 2012 Olympic and Paralympic Games. We hope that the implementation of our recommendations will go some way to achieving these outcomes.

## Recommendations

1. Visit London should set and monitor targets to increase the resources devoted to promoting tourism in outer London, covering:

- the proportion of financial resources devoted to tourism in outer London
- the proportion of the coverage given to outer London in promotional material, including that aimed at the international visitor
- the information available on the Visit London website about outer London attractions and facilities

To enable this shift, within the existing process for allocating resources by economic return, Visit London should set lower return thresholds for the marketing of outer London than for central London, in line with the stated aim to disperse visitors across the capital.

2. Visit London should review the pricing of their advertising and partner status, to ensure that they continue to attract more outer London attractions into partnership and help the shift of resources to promoting outer London.
3. Outer London boroughs should appoint or designate a specific tourism contact with whom Visit London and other tourism bodies can engage.
4. Visit London should more effectively engage with boroughs and other local bodies by:
  - expanding the number of staff liaising with boroughs
  - providing materials to demonstrate to local councils, particularly Members, the benefits of tourism and investment in promoting it
  - allowing boroughs more time to respond to consultations and giving boroughs the opportunity to verify information in promotional material before publication
5. The London Development Agency must use its sub-regional tourism strategies in each area of London to support the local tourist sector as a whole. To do this, it must identify the needs and opportunities in accommodation, attractions and other aspects of the visitor offer, and show how the development of each facility and attraction can support the others.

## **Economic Development, Culture, Sport and Tourism Committee Members**

Dee Doocey, Chair	Liberal Democrat
Bob Blackman, Deputy Chair	Conservative
Tony Arbour	Conservative
Jennette Arnold	Labour
Angie Bray	Conservative
Sally Hamwee	Liberal Democrat
Damian Hockney	One London
Murad Qureshi	Labour

Terms of reference for the Tourism in outer London investigation:

- to examine what is being done by the LDA and Visit London in partnership with London Boroughs and other stakeholders to promote tourism in outer London;
- to examine the funding and marketing strategy of the LDA and Visit London to promote tourism in outer London; and,
- to investigate what the LDA, Visit London and other stakeholders are doing to increase the quality of accommodation in outer London.

Contact:

Ian Williamson, Scrutiny Manager  
[ian.williamson@london.gov.uk](mailto:ian.williamson@london.gov.uk)  
Tel: 020 7983 6541



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## List of those who provided views and information

The following organisations provided written views and information to the Committee:

- The London Boroughs of:
  - o Barnet
  - o Hillingdon
  - o Harrow
  - o Redbridge
  - o Bromley
  - o Hounslow
  - o Bexley
  - o Haringey
  - o Barking & Dagenham
  - o Camden
  - o Havering
  - o Kingston upon Thames
  - o Croydon
  - o Corporation of London
  - o Greenwich
  - o Waltham Forest
- Historic Royal Palaces
- Tourism Concern
- Bed & Breakfast and Homestay Association
- Royal Parks Agency
- London Development Agency
- Society of London Theatre
- English Nature
- English Heritage
- Youth Hostel Association
- Visit London
- Association of London Government
- Greater London Authority
- Learning and Skills Council – London South
- Transport for London
- People 1<sup>st</sup>

The following people attended a meeting of the Committee:

James Bidwell – Chief Executive of Visit London

Anita Thornberry – Head of Tourism and Visitor Economy, London Development Agency (LDA)

Ms Charly Reeve – Senior Tourism Development Manager, LDA

Ms Rebecca Kane – Visitor Operation Director London, English Heritage

Bob Cotton – Chief Executive, British Hospitality Association (BHA)

Ms Linda Dyos Culture, Film & Tourism Manager Croydon Business Limited

Philippe Baretaud - Development Director, Accor Hotel Group

We also commissioned research from Ipsos MORI, who conducted discussion groups with Borough tourism officers, hoteliers, restaurateurs and visitor attraction managers

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## **Principles of London Assembly scrutiny**

### **An aim for action**

An Assembly scrutiny is not an end in itself. It aims for action to achieve improvement.

### **Independence**

An Assembly scrutiny is conducted with objectivity; nothing should be done that could impair the independence of the process.

### **Holding the Mayor to account**

The Assembly rigorously examines all aspects of the Mayor's strategies.

### **Inclusiveness**

An Assembly scrutiny consults widely, having regard to issues of timeliness and cost.

### **Constructiveness**

The Assembly conducts its scrutinies and investigations in a positive manner, recognising the need to work with stakeholders and the Mayor to achieve improvement.

### **Value for money**

When conducting a scrutiny the Assembly is conscious of the need to spend public money effectively.

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