GLAECONOMICS

The Local Area Tourism Impact model results for 2008 and 2009

MAYOR OF LONDON

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Introduction

This report updates results from GLA Economics' Local Area Tourism Impact (LATI) model, formerly operated by the London Development Agency (LDA). The results provide Borough level estimates for tourism spend in the capital.

Results for previous years covering 2004 to 2007 were published online at the LDA's website and are still available at the following address:
http://www.lda.gov.uk/publications-and-media/publications/lati.aspx

It should be noted that due to some changes in the methodology used (outlined later in this paper) results from 2004 to 2007 are not directly comparable to the results for 2008 and 2009 in all instances.

Chapter 1: Methodological details

This chapter outlines the broad basis of the methodology used by the Local Area Tourism Impact Model (LATI) to estimate tourism expenditure within individual London Boroughs. The model has not been run since the 2007 data run and, therefore, two years of results are being presented in the current report. The methodology for the two years is consistent but a number of small changes at the margins have been made since the 2007 data run connected with changes to nationally available data and local London surveys. This chapter sets out the overall methodology used to calculate the results for each London Borough together with details of how the methodology has changed from that employed in 2007. First it presents some background to the methodology. Then it moves on to examining the sources used for London level tourism data before looking at the disaggregation process itself – explaining the construction of Borough level tourism spend for the 2008 and 2009 data runs.

The aim of the LATI model is to provide a cost-effective means to access local area tourism data for all Boroughs within Greater London without the expense (and potential for inconsistency in terms of methodological approach) of individual authorities commissioning their own work. This is all the more important given the severe cuts being faced by Borough authorities in the capital. It is hoped that the LATI estimates will continue to inform tourism policy development, assist in economic development decisions relating to tourism and its supporting infrastructure, help target marketing campaigns and facilitate the identification of future investment opportunities in the sector. The results themselves – and the following discussion regarding the methodological approach – will also contribute to the ongoing process of developing and improving historically weak tourism data for local areas within the capital, which, in turn, forms part of a current national debate.

GLA Economics recognises that LATI is a model in continuous development as, for example, data sources change. Comments and feedback on both the results and the methodology used to derive them form an important part of this process and are welcome. GLA Economics also wishes the process of deriving these estimates to be as 'open' as possible and to this effect enquiries regarding more specific aspects of the methodology (and its changes since the 2007 data run) are also welcome and should be directed to:

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Background to the approach

The LATI model starts with a broadly 'top down' approach, utilising as a baseline the Greater London level tourism data available from national surveys such as the UK Travel Survey (UKTS) and the International Passenger Survey (IPS). These two surveys – covering the UK domestic overnight tourism sector and international tourism respectively – are similar in their disaggregation of tourism spend, enabling GLA Economics to break down expenditure data at the Greater London level into the following five sub-categories:

- Accommodation
- Eating and drinking
- Shopping
- Entertainments
- Other

In order to produce Borough level estimates, LATI uses what appears to be the most robust information available (which is by no means always ideal on account of data availability) to divide out the Greater London level expenditure in each of these five categories. Clearly the contents of some of these sub-categories are more easily understood than others. Particularly difficult is 'Other' – which emerges as consisting mainly of internal travel spend within the capital. This presents some difficulty as it is not intuitive how (for example) spend on a train ticket from Charing Cross to Greenwich should be allocated by Borough (if at all).

Day visitor data continues to create particular problems as there is no comparable national level survey to UKTS or the IPS for this sector of tourism. Readers are advised to read the separately published Current Issues Note 29[1] on day visitor estimation and the inherent data difficulties associated with it for further details. If estimates from a relatively recently conducted survey by the LDA are correct, then day visitor expenditure is (in aggregate) as important to a Borough's final result as domestic overnight and international visits combined.

Expenditure by overseas, domestic overnight tourists and day visitors in each of the five sub-categories is summed to provide an estimate of the total value of tourism to each Borough. Whilst individual estimates of the value of each of the sub-categories of expenditure to each Borough are not published in this report such variations are being monitored carefully by GLA Economics and form the basis for continuing methodological developments.

London level tourism data

Official tourism data for London are used in combination with employment data from the Business Register and Employment Survey (BRES) to produce Borough level tourism results[2]. This section covers the London data sources which form the spine of LATI and highlights issues associated with such sources that may affect Borough level tourism estimates.

Whether one is looking at individual London Boroughs or the capital as a whole, there are three basic visitor types comprising London's total visitors:

- International visitors – people from a country other than the UK visiting the location;

[1] GLA Economics Current Issues Note 29: Estimating the contribution of leisure day visitors to London's tourism industry. http://www.london.gov.uk/publication/estimating-contribution-leisure-day-visitors-londons-tourism-industry

[2] BRES has replaced the Annual Business Inquiry (ABI) – which was previously used in the model – and this has a number of important implications for LATI which are discussed in more detail later in the chapter.

- Domestic overnight tourists – people from other parts of the UK staying in the location for at least one night;
- Day visitors – intuitively more difficult to delineate. However tourism day visitors have a formal definition under the UN agency, the World Tourism Organization (UNWTO) as those on day trips away from home for three hours or more and not undertaking activities that would regularly constitute part of their work or would be a regular leisure activity.

The three different tourist types do **not** have a common, unified survey data source. The International Passenger Survey (IPS) covers international tourism, measuring the value and volume of overseas visitors to London and to the UK. The IPS is based on a sample of just over 250,000 responding passengers per annum – about half of whom will be visiting London itself – and is a continuous survey conducted 362 days per year. Based on face-to-face interviews at the UK's principal airports, sea ports and the Channel Tunnel, it has been running since 1961 and therefore provides a comprehensive time series. However, from LATI's perspective, one particular weakness is the lack of categorised expenditure data for both London and the UK since 1997. Tourism intelligence bodies are lobbying hard to have this addressed but, in the meantime, category shares have to be carried forward from 1997 – a particularly unhelpful assumption given the scale of overseas visits to the capital and the changing mix of countries from which visitors to London travel.

Domestic overnight visitors are captured by the UK Tourism Survey (UKTS) and monitored by Visit England, Croeso Cymru, Visit Scotland and the Northern Ireland Tourism Board. UKTS has a sample size of about one fifth of that of the IPS (and a far smaller London sample size of less than 2,000). However, estimates of number of trips, nights and spend are available down to County level nationally on an annual basis. Whilst the aims of the UKTS have been constant, there have been a number of significant methodological changes – perhaps most notably in 2000 and 2005. However, it is generally accepted that the methodological changes have resulted in a more robust approach.

Unfortunately, there is no comparable, regular, national survey of day visitors and their expenditure. National day visitor surveys have been conducted at irregular intervals but there has been a particular dearth of data in recent years. Furthermore, some of the national surveys have not been able to provide volume and value data for London and the last time that a national survey did so is now as far back as 2002/03. Full issues relating the surveys such as the Great Britain Day Visits Survey (GBDVS) and England Leisure Visits Survey (ELVS) are given in the GLA Economics Current Issues Note 29 publication together with the methodology for estimating London's day visitor expenditure.

Given the quality issues associated with pre-existing day visit surveys, the London Development Agency (LDA) took steps to provide a more accurate and timely estimate by feeding questions into an Omnibus Survey of UK households. The results from this survey (which was run over 2008) were used to generate day visitor expenditure and volumes for Greater London. These were used as the London base for the 2007 LATI data run and been used again this time: unadjusted for the 2008 data run and proxied to movements in domestic overnight visitor spend for the 2009 data run. It needs to be realised that all such estimates are extremely experimental and carry very significant caveats pertaining to their accuracy. As such, the individual Borough results are not reported in great detail. However, they are presented in summary in a table for each

Borough. As noted above, the Borough level day visitor spend estimates should be treated with some caution and are intended only to give a 'ball park' estimate of the likely scale of day visitor tourism in each Borough.

It should be noted that the LDA's London day visitor estimates - and their forward extrapolation by GLA Economics this year – represent merely a short-term solution until national day visitor surveys are capable of providing acceptable London level data. GLA Economics continues to work with ONS' Tourism Intelligence Unit (ONS-TIU) and the English Tourism Information Partnership (ETIP) to ensure that future national day visit surveys provide both robust and timely London level data which will include business day visits.

The DCMS definition of the value of tourism includes two other elements beyond the direct visitor expenditure taking place in the UK, namely:

- Payments made by overseas visitors to UK carriers (such as airlines);
- Imputed rents that UK residents derive from second homes used as accommodation on tourism trips – but not actually paid for.

In 2007 payments by overseas visitors to UK carriers was estimated to be £2.7 billion. Oxford Economics estimates this to have risen since to £3.0 billion in 2008 and to £3.3 billion in 2009[3]. In contrast, the imputed rents element is considered to be broadly static in the UK at £1.0 billion. In 2007 it was estimated that London might account for £1.0 billion of the £2.7 billion in payments to carriers and that £102 million might be attributable to London on the imputed rents side. We might estimate payments by overseas visitors to UK carriers based in London to be £1.1 billion in 2008 and £1.2 billion in 2009. With no better information available, £102 million has been carried forward for both years for the London share of imputed rents.

Arguably, attempting to attribute portions of these components to individual Boroughs is largely meaningless. For this reason neither is included in the disaggregation of spend to Boroughs. A further adjustment has been made within domestic tourism where expenditure on packages has been excluded.

Disaggregation of London level data

The approach taken reflects the 'top down' nature of the LATI model. This approach is best suited to the disaggregation of spend rather than trip numbers. Expenditure occurs at discrete locations within the city. Therefore Greater London level tourism expenditure as measured by national surveys must, by definition, be the sum of expenditure in the 33 Boroughs (imputed rents and payments to UK carriers aside).

In contrast, trips can be taken to multiple locations within London over the course of a visitor's stay in the capital. Therefore the number of trips to London as recorded by national tourism surveys can be less than the number of trips taken to all Boroughs within London. Therefore, GLA Economics has attempted to disaggregate London level tourism expenditure from national surveys to each Borough only and has not attempted to do the same for trips.

In order to disaggregate tourism expenditure requires one to know the following:

[3] See Deloitte – The economic case for the Visitor Economy: Final report (September 2008).

a.) The different types of product tourists purchase;
b.) How much different visitor types spend on various categories of goods and services;
c.) Where purchase or consumption of different types of product by different visitor types takes place.

a.) and b.) are provided in broad terms by national tourism surveys. However, the geographical element in c.) has to be estimated from other sources. Certain goods and services can be classed as 'tourism characteristic'. For example, hotels and tourist attractions such as Hampton Court Palace and the Tower of London as well as some types of theatres derive a large proportion of the revenues from tourists. Other products are also demanded in large quantities by tourists but also receive 'high resident demand' alongside this. Both the retail and the transport sectors fall into this category as, to a lesser extent, do restaurants and bars.

However, since visitor spend is especially concentrated on tourism characteristic products, national tourism surveys tend to collect both UK and London expenditure data on the basis of the following broad categories:

- Accommodation
- Eating & drinking
- Shopping
- Entertainments
- Other

In a perfect world, tourism surveys would present data for expenditure on the basis of tourism spend by all visitor types: not just overseas visitors, UK domestic overnight visitors and day visitors but also further divided according to purpose:

- Holidays / leisure
- Business
- Visiting friends and relatives (usually abbreviated to VFR)
- Other

However, only the UKTS (covering the UK domestic overnight sub-sector of the industry) actually does provide a split according to purpose. However, given the sample sizes involved, the robustness of such estimates might also be called in question. Traditionally, a weakness of what little day visitor data there is has been its restricted focus upon the leisure sector. Therefore LATI is currently limited to providing a breakdown according to the three main visitor types only.

Information used to disaggregate Greater London level data

Taking this approach to the disaggregation of Greater London level tourism data involves identifying as robust information sources as possible in order to split out the aggregated data to the Boroughs by overseas, domestic overnight visitors and day visitors within the five sub-categories. Spatial consumption patterns are likely to differ by sub-category. Shops, hotels and theatres all exhibit different geographical distributions across Greater London and therefore one would expect different patterns of expenditure on shopping, accommodation and entertainments. Hence separate

information sources tend to be required for where the consumption of the five product groups takes place.

Robust Borough level information from which to allocate shares tends to come from two main sources:

- The ONS Business Register and Employment Survey (BRES) which has replaced the Annual Business Inquiry (ABI) – providing data on employment by Standard industrial Classification code;
- Bespoke surveys of accommodation providers and tourists in London.

BRES provides robust data on employment in different economic sectors within the London Boroughs, broken down to a relatively fine grain in terms of industrial sectors. This makes it possible to identify employment in sectors that are likely to supply tourists with the products and services that they will tend to demand – for example, hotels, restaurants and bars and comparison retail shopping.

A number of options are currently available to help identify patterns of accommodation expenditure within London. Both the 2008 and 2009 data runs have used the same Experian survey as used in the 2007 data run. This produces more consistent results than using an alternative accommodation census currently held by the London Development Agency (LDA) although the accommodation and other spend sectors of the model were also run on this latter basis for comparison. The old Experian survey was also used in preference to one undertaken more recently by IFF on the basis that the latter produced a step change in many of the results between 2007 and 2008 - the accuracy of which could not be (easily) verified[4].

In fact, none of these accommodation approaches is perfect because what is actually required is tourism spend and not bed numbers. It is likely that a hotel in a Borough such as Kensington & Chelsea or Westminster will charge more per night (on average) than one in a Borough such as Havering or Croydon. Furthermore, it is also likely that occupancy rates will be higher in the central London area. At present, there is some survey data on prices and occupancy rates available from more than one survey (including the Experian one used in the 2008 and 2009 data runs) but it is not disaggregated enough to be of practical use for the LATI model although that area does still offer future development potential[5].

The LDA's London Visitor Survey (LVS) is also used in order to help understand where tourists are visiting and to get a better grip on expenditure beyond accommodation. However, the sample sizes for visiting attractions in particular Boroughs can be relatively small which can increase the variability of data between one year and another. In particular, close analysis of the results from recent years indicated that day visitor 'other' spend was exhibiting especially erratic shifts on account of the small area LVS samples. Therefore, for the first time, GLA Economics has introduced a system of 2 year average smoothing to dampen the amplitude of changes from one year to the next in this spend category for that visitor type. Nevertheless, this also remains an area for future development.

[4] Note here that some analysis has been conducted on the implications of using the different sources of information in the LATI model – see Methodological Appendix 1.
[5] Note here that some experimental analysis has been conducted on the basis of the limited price information available and some further detail is presented in Methodological Appendix 1.

A number of other surveys were examined and experimented with for the purposes of the 2008 and 2009 data runs. For example, surveys of visits to visitor attractions were trialled. However, the degree of variability in entertainments expenditure derived from this approach suggests that it is not robust enough yet for use in the LATI model.

The construction of Borough level tourism spend estimates for 2008 and 2009

This section outlines how the different sources of data are drawn together in order to generate Borough level estimates of expenditure. This necessitates some discussion of caveats and issues surrounding changes to critical data sources.

The exact method of disaggregation from London level results to Borough level results depends on the specific sub-category under consideration but is always based primarily on either employment data issued by the Office for National Statistics (ONS) and/or survey data. For the 2008 and 2009 runs of the model there are some additional complications associated with the use of employment data as two major changes have taken place in terms of national statistics since the 2007 data run. These are:

- A switch of Standard Industrial Classification (SIC) from SIC 2003 to SIC 2007. Further details on the correlations between the two coding sets can be downloaded from the ONS' website at: http://www.statistics.gov.uk/methods_quality/sic/downloads/weightedtablesforwebsite.xls

- The major change of survey from the Annual Business Inquiry (ABI) to the new Business Register and Employment Survey (BRES). BRES is claimed by ONS to be a more accurate survey, identifying businesses that were either missed or mis-classified by the former ABI. This has resulted in some significant shifts in employment even at the Greater London level and some very pronounced shifts in employment at the Borough level (including within tourism sub-sectors). Again, documentation on the change of survey can be found on ONS' website at: http://www.statistics.gov.uk/downloads/theme_labour/bres/discontinuity-article.doc

Accommodation spend is also constrained to a survey of hotel accommodation using aggregations of Boroughs known in this report as 'superboroughs'. As will be discussed in greater detail later, this survey has not been updated since the 2007 data run of the LATI model although a number of alternatives were examined during the research and scoping process for the 2008 and 2009 data runs. There is also a small change in how the two stage methodology within accommodation has been implemented for the 2008 and 2009 data runs.

The top-down nature of the approach used within the model means that, strictly speaking, it can be used only to generate visitor expenditure estimates rather than trip numbers. In the past some estimates have been calculated. For the 2008 and 2009 data runs, those trip estimates have not been estimated because the relationship between expenditure and trips is not likely to be constant across Boroughs.

The Borough level estimates of expenditure are 'fit for purpose' for use in comparisons over time and between Boroughs and are considered by GLA Economics to be a

reasonable measure of tourism turnover or 'output'. However, there are possibilities through which data may not represent the scale of tourism in a Borough – for example, where a Borough receives lots of visitors but does not actually have much in the way of bed space. Furthermore, only a share of tourism spend is ever likely to accrue to local businesses within a Borough. This is because in an open economy, some value added will be attributable to other economies where a good or service has been produced – wholly or partly – beyond the 'host' economy. In addition, expenditure taken in taxation by Central Government does not represent direct value added to a local economy. Conversely, tourism may have an impact on sectors beyond the immediately obvious visitor economy through forward and backward supply chains.

Work undertaken by the Department of Culture, Media and Sport (DCMS) has been used to estimate tourism employment in each Borough since (for example) only some parts of transport employment will be attributable to tourism. This application has also been more complicated than usual for the 2008 and 2009 data runs as DCMS' proportions to apply to the sub-sectors were based on the old SIC 2003 and recalculation by GLA Economics has been necessary with the help of ONS. This is discussed in greater detail in Chapter 2.

On account of the slightly divergent approaches taken for overseas, domestic overnight and day visitors, and for the sake of completeness, this report provides details of the methodology for each visitor type. As a result, this necessitates some degree of repetition.

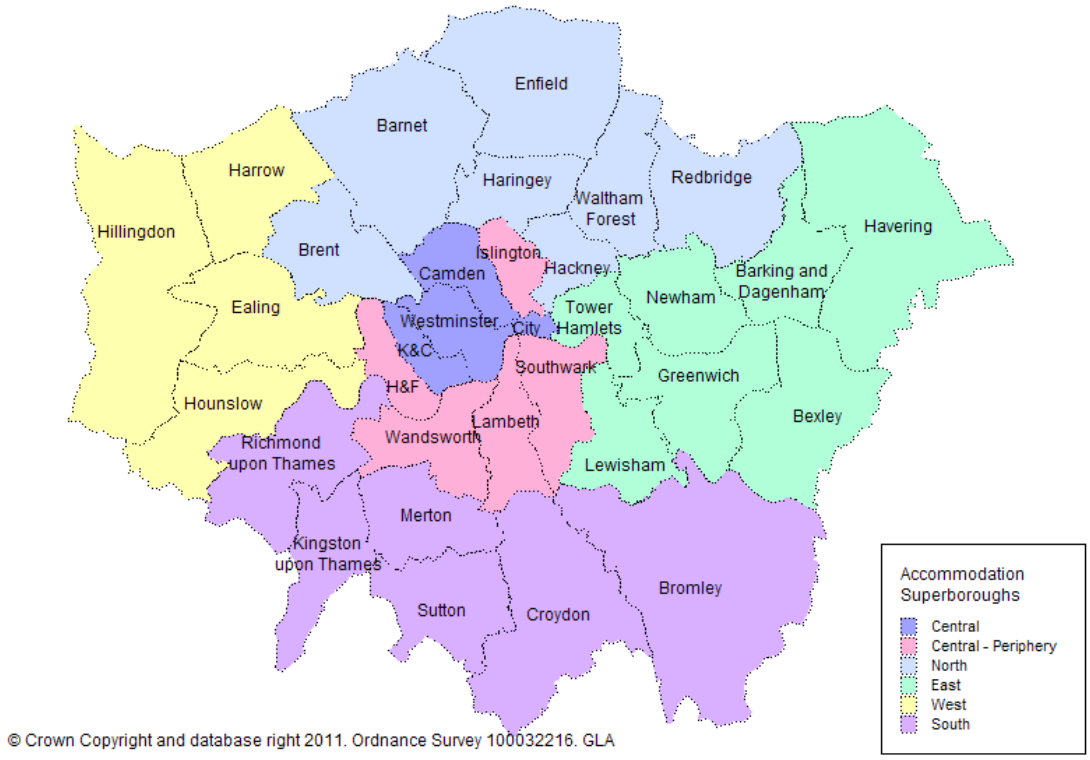
1 Overseas tourists to London

Total tourism expenditure for London from the International Passenger Survey (IPS) is taken and divided into different categories of expenditure. This is done using information from the 1997 IPS (on categorised expenditure). As noted earlier this lack of timely categorised expenditure data is one of the current weaknesses of the IPS. This categorisation provides the top-level Greater London expenditure data for accommodation, eating and drinking, shopping, entertainments and other spend.

Accommodation spend: This is a two stage process.

Although it is possible to produce data for all Boroughs from the Experian accommodation survey, the sample sizes in some of the 'smaller' Boroughs in tourism terms are such that it makes sense to aggregate into 'superboroughs'. This has been done to the same specifications as in the 2007 data run with the exception that all Boroughs have been grouped. Map 1 shows the composition of these superboroughs.

Map 1: Superboroughs within London for accommodation share purposes



Source: GLA Economics, Experian

It should be noted that on previous runs of LATI the Central London Boroughs (Westminster, Kensington & Chelsea and Camden) were treated slightly differently in that they did not undergo this first stage of the process (the logic being that their sample sizes were sufficient in the 2007 survey of accommodation providers for the second stage to be unnecessary). For the 2008 and 2009 data runs, all Boroughs have been put through both stages of the process.

The second stage of the process involves using BRES employment data in the SIC codes relating to hotels and accommodation. In the case of this sub-sector of tourism employment the conversion of codes from SIC 2003 to SIC 2007 is relatively straightforward. Total employment in those SIC codes is calculated for each superborough. Each Borough's share of the superborough is then applied to the total share attributable to that superborough and then multiplied out by total Greater London expenditure.

Eating & drinking: This is a straightforward disaggregation based on share of BRES employment in bars and restaurants. Again, this particular sub-sector of tourism employment is straightforward to shift from a SIC 2003 basis to a SIC 2007 one.

Shopping: This is another straightforward disaggregation based on share of BRES employment in 'comparison retail'. The shift from SIC 2003 to SIC 2007 has enabled a rather tighter definition of comparison retail to be established and used for the 2008 and 2009 data runs. However, experimenting with various modifications of the SIC code definitions at the margin (such as including or excluding retail trade not in stores, stalls or markets) proved to have very little effect on the shares. The resultant shares were

multiplied out by total Greater London tourism spend on shopping. The definition could probably be narrowed further in future as some of its components may still be more applicable to residents rather than tourists (although these tend to have relatively low employment). Components used for the shares were:

- 474 (information and communications equipment);
- 475 (household equipment);
- 476 (cultural and recreational)
- and 477 (other goods)

Entertainment: Although a number of other options were examined here, the 2008 and 2009 data runs continued to use the London Visitor Survey's results on overseas tourist spend on tickets and admissions as a proxy. There are some weaknesses here and not simply on account of sample size. For example, expenditure is banded in the survey so midpoint spend within that band has to be assumed. At the top end of spend some average spend has to be imputed. Borough shares of the London total were calculated and applied to the total Greater London tourism spend on entertainments.

Other: The options available for other spend by overseas tourists were re-examined. For example, an attempt was made to use travel and other expenditure data drawn from the LVS but, in the end, GLA Economics opted for using accommodation spend as a proxy. That, of course, makes patterns of accommodation expenditure a major driver of total overseas tourism spend, accounting for 50 per cent of total.

2 Domestic overnight staying visitors to London

Total tourism expenditure for London comes directly from the UK Tourism Survey (UKTS) and is already split fairly conveniently into categories that can be aggregated to the five sub-category level.

Accommodation spend: Again, this is a two stage process. Once again that there is a methodological difference when compared with the 2007 data run in terms of all Boroughs going through both stages of the process.

Although it is possible to produce data for all Boroughs from the survey, the sample sizes in some of the 'smaller' Boroughs in tourism terms are such that it makes sense to aggregate into 'superboroughs'. This has been done to the same specifications as in the 2007 data run with the exception that all Boroughs have been grouped. See Map 1 for the superborough definitions.

Domestic overnight tourists have a separate share out of this higher-level accommodation indicator from international visitors, extracted from the survey files themselves.

The second stage of the process involves using BRES employment data in the SIC codes relating to hotels and accommodation. In the case of this sub-sector of tourism employment the conversion of codes from SIC 2003 to SIC 2007 is relatively straightforward. Total employment in those SIC codes is calculated for each superborough. Each Borough's share of the superborough is then applied to the total share attributable to that superborough and then multiplied out by total Greater London expenditure.

Eating & drinking: This is a straightforward disaggregation based on share of BRES employment in bars and restaurants. Again, this particular sub-sector of tourism employment is straightforward to shift from a SIC 2003 basis to a SIC 2007 one.

Shopping: This is another straightforward disaggregation based on share of BRES employment in 'comparison retail'. For the SIC definition used see the brief discussion under overseas tourists.

Entertainment: Although a number of other options were examined here, the 2008 and 2009 data runs continued to use the London Visitor Survey's results on overseas tourist spend on tickets and admissions as a proxy. Borough shares of the London total were calculated and applied to the total Greater London tourism spend on entertainments. For weaknesses of this methodology see the brief discussion under overseas tourists.

Other: Again, accommodation spend was used as a proxy. A with the overseas tourism visitor type, this methodology makes accommodation spend a major driver of the overall result, accounting in this case for around 57 per cent of total.

3 Day visitors to London

Obviously, the day visitors component presents some specific complications as there is no top-level national survey to be used. For the 2008 data run the 2008 Omnibus Survey results were used unadjusted. For the 2009 data run, this was again taken as a start-point but the total estimated figure for day visitor spend was multiplied by the product of total domestic overnight visitor spend in 2009 divided by total domestic overnight visitor spend in 2008 (prior to adjustment). This resulted in a small decline for the base Greater London figure between 2008 and 2009.

Obviously, day visitors do not require accommodation so that sub-category of expenditure is redundant in the calculations. Proportions for the remaining four sub-categories of expenditure were carried forward from previous years as follows based on data from the last day visits survey:

- Eating and drinking (36.7%)
- Shopping (33.3%)
- Entertainments (9.8%)
- Other (20.2%)

Eating & drinking: This is a straightforward disaggregation based on share of BRES employment in bars and restaurants.

Shopping: This is another straightforward disaggregation based on share of BRES employment in 'comparison retail'. For the SIC definition used see the brief discussion under overseas tourists.

Entertainment: Although a number of other options were examined here, the 2008 and 2009 data runs continued to use the London Visitor Survey's results on overseas tourist spend on tickets and admissions as a proxy. An additional complication here is that the LVS actually has 4 rather than 3 basic types of visitor (although it also divides each type into business and leisure tourism as well): the fourth being Londoners on day

trips themselves. This had to be accounted for as nearly half of London's day visitors are from Londoners themselves. Borough shares of the London total were calculated and applied to the total Greater London tourism spend on entertainments. For weaknesses of this methodology see the brief discussion under overseas tourists. For both 2008 and 2009 a new technique was used based on two year averages (2007 and 2008 for the 2008 data run and 2008 and 2009 for the 2009 data run) in order to reduce the volatility of results from one year to another.

Other: Here it would have made no sense to proxy other spend to accommodation spend as day visitors do not spend on accommodation. In spite of the problems associated with tourism and other spend in the LVS, this was used to apportion other spend. For both 2008 and 2009 a new technique was used based on two year averages (2007 and 2008 for the 2008 data run and 2008 and 2009 for the 2009 data run) in order to reduce the volatility of results from one year to another. This is an important modification to the methodology since other day visitor spend accounts for approximately 11 per cent of total tourism expenditure in the model and can be more important still in some Boroughs.

Chapter 2: Tourism in London and the UK: some recent trends

This chapter examines the latest estimates for jobs supported by tourism in the capital before moving on to value and volume estimates for London as a whole.

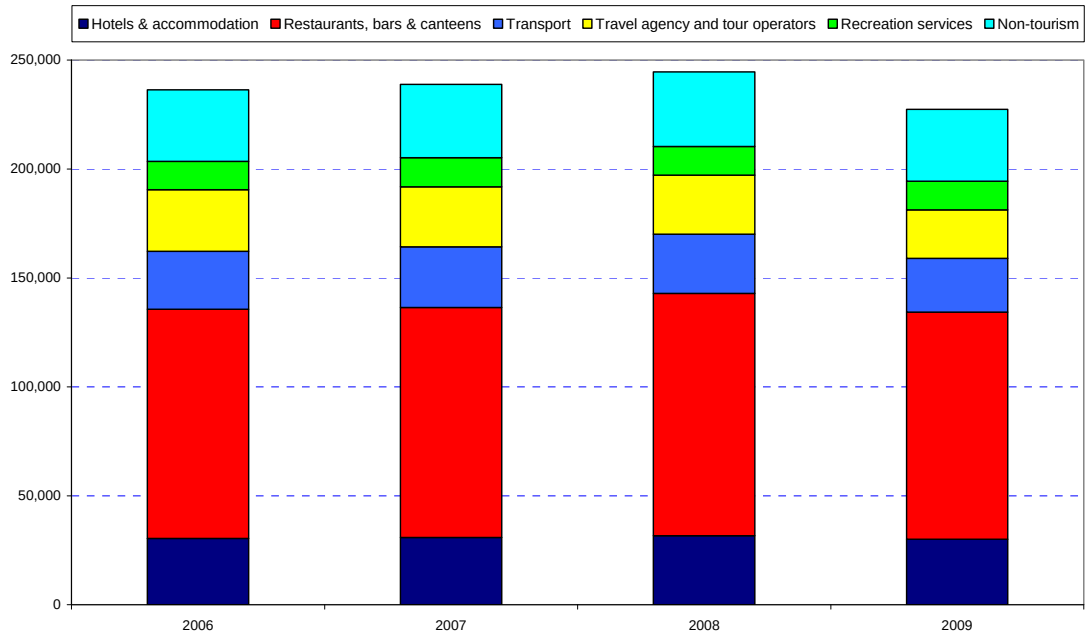
Employment

The methodology used for counting jobs in tourism in London is based upon data from the ONS and apportionments from the Department for Culture, Media and Sport (DCMS). The method uses ratios of employment supported by tourism across a broad range of sectors. These sectors actually cover the whole economy including sectors not usually considered to be part of tourism. For the 2008 and 2009 runs of LATI there have been complications created by changes to SIC codes and to survey bases and GLA Economics is grateful to ONS' London Statistical Support for help on making certain that these time series are consistent.

For the first time, GLA Economics has also included an estimate of self-employed jobs supported by tourism to which different DCMS apportionment factors have been applied. However, the data is not robust enough to support any analysis of change from one year to the next and has therefore been based upon an average of three years of APS estimates. Therefore, analysis of change is not appropriate and where changes are examined they have been based solely upon employee numbers.

Total jobs (employees plus self-employment) in London supported by tourism are estimated at 244,600 for 2008 and 227,400 for 2009. Of that 227,400, nearly half (48%) is believed to be in restaurants, bars and canteens. A further 13% is estimated to be in hotels and accommodation, 11% in the transport sector, 10% in travel agencies and tour operators and 6% in recreation services. Some 33,000 jobs (equating to around 15%) are supported in sectors not normally considered to be in tourism as shown in Figure 1.

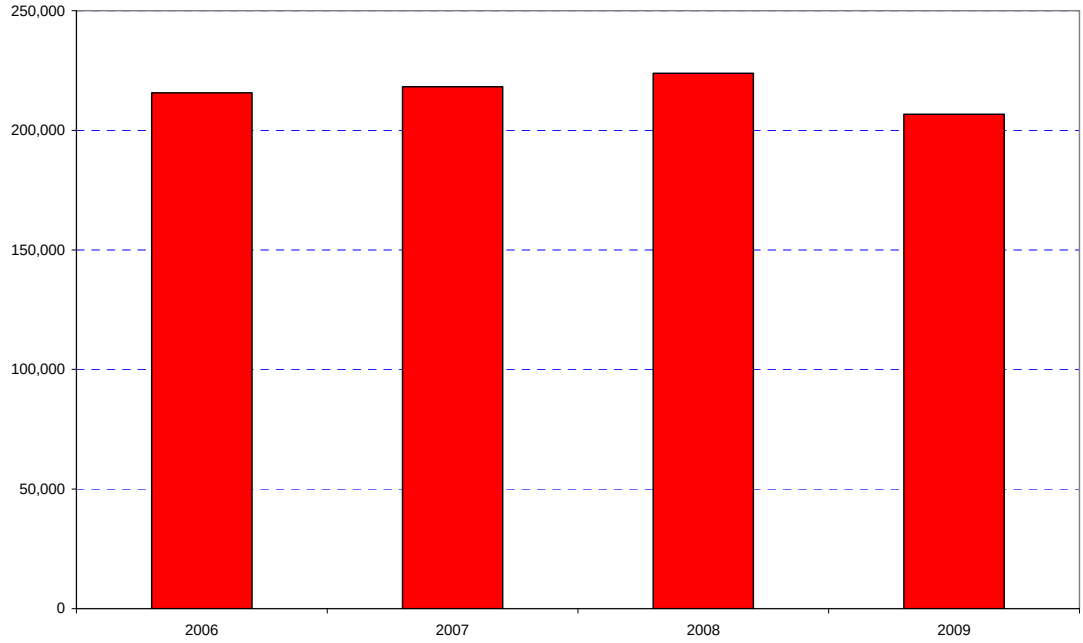
Figure 1: Total jobs in London supported by tourism broken down by broad sub-sector, 2006-2009



Source: ONS – APS, ABI, BRES, DCMS, GLA Economics, ONS London Statistical Support

When employees only are analysed, employment is estimated at 223,900 for 2008 and 206,700 for 2009. Estimated employee numbers rose 1.2 per cent between 2006 and 2007 and by a further 2.6 per cent between 2007 and 2008. However, the recession appears to have had a very marked impact on tourism employment in the capital with employee numbers showing a decline of 7.7 per cent between 2008 and 2009 as shown in Figure 2.

Figure 2: Employees in London supported by tourism, 2006 – 2009



Source: ONS – ABI / BRES, DCMS, GLA Economics, ONS London Statistical Support

Value and volume

Tables 1a and 1b present the overall estimated picture at the Greater London level for 2008 and 2009 respectively.

Table 1a: The value and volume of tourism in London in 2008 (all figures in millions).

Greater London	Overseas	Domestic	Day Visitors*	Totals
Day visits	-	-	181.0	181.0
Staying visits	14.8	11.3	-	26.1
Spend (£)	8,126	2,190	12,184	22,501

Source: UKTS, IPS, Day visits surveys, GLA Economics calculations
* Note here that day visitor estimates are experimental and do not include business travellers.

Table 1b: The value and volume of tourism in London in 2009 (all figures in millions).

Greater London	Overseas	Domestic	Day Visitors*	Totals
Day visits	-	-	171.4	171.4
Staying visits	14.2	10.8	-	25.0
Spend (£)	8,315	2,140	11,540	21,995

Source: UKTS, IPS, Day visits surveys, GLA Economics calculations
* Note here that day visitor estimates are experimental and do not include business travellers.

Additional notes for the above tables:

- Figures may not sum due to rounding;
- Figures for domestic spend may not match published figures on account of adjustments for the costs of packages;
- Some of these data are subject to revisions;
- Tourism spending here does not include any share of overseas fares to UK carriers for London or imputed rents which together are estimated at £1.2 billion in 2008 and £1.3 billion in 2009.

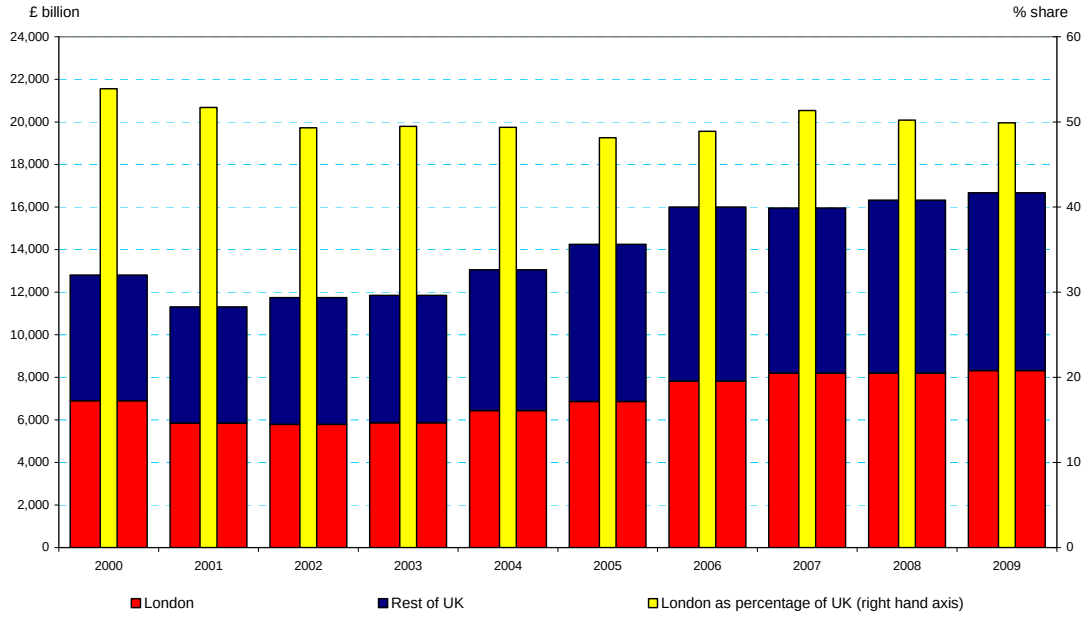
International tourism

In 2009 overseas visitors spent £8.3 billion in London. This amount was up just over 2 per cent on 2008 and barely above the figure for 2007 (£8.2 billion). These figures are in nominal terms – i.e. not adjusted for changes in prices. The total number of visits by international visitors to London continued to fall to 14.2 million in 2009 from 15.2 million in 2007.

Of the 29.9 million international visits that the UK received in 2009 almost half (14.2 million) visited the capital.

Over the past decade – and in spite of considerable variation in overall receipts in the UK – London has consistently accounted for around half of all spend in the UK as can be seen in Figure 3.

Figure 3: International visitor spend, 2000 - 2009



Source: IPS

In 2000 overseas visitor spend stood at £6.9 billion in London and at £5.9 billion in the remainder of the UK. However, the next couple of years were difficult ones for international tourism to the UK triggered by both Foot and Mouth Disease in the UK itself and by the 9-11 attacks in the United States. Although tourist spend still rose in the rest of the UK in 2002, it continued to fall in London and even the increase in 2003 of just over 1 per cent was relatively weak. However, the rate of spending growth picked up in 2004 but 2005 was slower – most likely on account of the London bombings. 2006 and 2007 saw stronger increases in the capital's receipts. However, since 2007, the London picture on spend has been broadly flat (unadjusted for prices).

Analysis of IPS data for 2009 suggests that the largest numbers of overseas visitors to London were from the United States, France, Spain and then Australia. The picture is similar in spending terms with the United States, France, Germany and then Spain ranking highest. However, the overall picture is changing slowly and when average spend per tourist figures are examined it emerges that the highest spends per visitor were for tourists from Saudi Arabia and the United Arab Emirates. Further details of this analysis will be provided in a forthcoming GLA Economics Working Paper.

Domestic overnight tourism and tourism spend

Across the UK as a whole, 2008 was a difficult year for domestic tourism. The sector was hit hard by the economic recession in the second half of the year. In contrast, the rise in spend in 2009 appears to have been linked to an increase in demand for domestic holidays as UK consumers switched from foreign holiday destinations to 'staycations'. However, business trips and visits to friends and relatives (VFR) continued to experience

difficult circumstances. Overall, trips increased by 7 per cent between 2008 and 2009 to £126.0 million. However, the increase in domestic overnight spend was noticeably less – up around 4 per cent at £21,881 million. However, this figure is in nominal terms and has not been adjusted for rising prices. Over 2008 the Retail Price Index (RPI) was 4 per cent. It could therefore be argued that the entire increase in spend between 2008 and 2009 could be accounted for by price differences although for this statement to be more technically accurate the individual components would have to be examined more closely.

Figure 4 shows expenditure by domestic overnight visitors in the capital and the rest of the UK. Spending in the capital by domestic overnight visitors represents a far lower share of total UK domestic overnight spend than is the case with overseas visitors. Although the actual proportion (represented by the yellow bar) has fluctuated, in recent years it has typically been about 10 per cent.

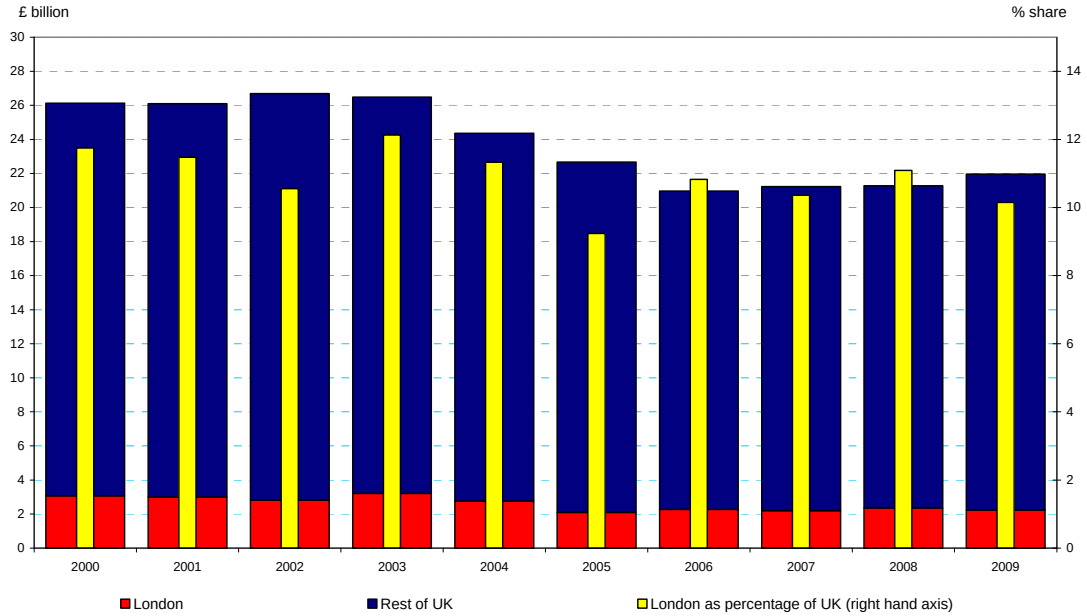
From 2000 to 2003 domestic overnight visitor spending was reasonably steady. Thereafter the UKTS data showed a downward trend – both in London and in the remainder of the UK. For the UK as a whole expenditure declined by more than 20 per cent between 2003 and 2006. However, since then it has stabilised.

For 2008, London domestic overnight spend showed only a small increase on 2007, whilst in the rest of the UK it fell slightly. For 2009, spend in London declined slightly whilst there was a moderate increase of 4.4% in the rest of the UK[6].

There have been concerns in the recent past about the quality of UKTS data. Prior to 2005 it was suspected that the results were affected by a problem with the changing demographic profile of the telephone survey sample. The methodology was subsequently changed to face-to-face interviews. However, in spite of the change in survey methodology, results still indicate lower domestic tourism spend in both London and the UK as a whole than prior to 2004.

[6] London here is unadjusted for packages expenditure.

Figure 4: Domestic overnight visitor spend, 2000 - 2009



Source: UKTS, GLA Economics calculations

Tourism day visits

There remains an ongoing lack of tourism day visitor data for the capital. There have been irregular day visitor surveys conducted every few years and the latest was the England Leisure day Visits Survey (ELVS) back in 2005. However, even this survey did not provide value and volume data for day visits to London. The most recent national survey to do this was the Great Britain Visits Survey (GBDVS) in 2002 – 2003.

Given this national situation, the London Development Agency took steps to provide a more timely set of day visitor estimates for London. An omnibus survey of UK households, conducted throughout 2008, has again been used to estimate day visitor expenditure and volumes for London as it was for the 2007 estimates. For 2009 these results have been adjusted downwards in line with the decline in domestic overnight visitor spend prior to adjustment for packages. Although such estimates are actually highly experimental in their nature, the survey is based on a large sample of respondents. Previous surveys (the GBDVS and ELVS) did not publish the same origin and destination data and were based upon smaller sample sizes. Consequently, the results from ELVS and the GBDVS should not be viewed as comparable with the LDA / GLA Economics estimates.

From the London level day visitor survey indicative Borough estimates have been derived. However, these figures are only indicative and should be treated with some caution. They are intended only to provide a 'best estimate' of the scale of day visitor tourism in each Borough from the data that is currently available.

The day visitor estimates are a short-term solution until national day visitor surveys are available to provide London level data of adequate quality. Therefore GLA Economics continues to work closely with other interested parties.

The estimated figure for leisure day tourism expenditure in the capital based on the omnibus survey responses is £12.2 billion for both 2007 and 2008. For 2009 it has been estimated at £11.5 billion. An additional £6.3 billion was estimated for business day visitor expenditure in 2007. This figure has not been updated.

A tourism day visit has been defined as a trip of at least three hours that is not taken on a regular basis. This definition covers activities that may not – as a matter of course – be considered to be 'tourism day visits'. For example, it might include shopping trips to different town centres or shopping centres; trips to the theatre or sporting events or days out to the park or a museum. Given the very broad definition of tourism day visits, it is perhaps unsurprising that estimates for day visitor expenditure are large as the boundaries between tourism and everyday expenditure are blurred.

Summary tables for Borough spend

The following tables may not sum to the aggregate due to rounding. They present a summary picture of estimated spend in each of the Boroughs for 2008 and 2009 – including an estimate for day visitor spend. Figures may not sum due to rounding.

Table 2a: Tourism spend by Borough for different visitor types in 2008 (£ million)

2008	Overseas	Domestic	Total Staying	Day visits*	Total
Barking and Dagenham	38	9	47	69	116
Barnet	160	35	195	396	591
Bexley	85	19	104	137	241
Brent	115	27	142	229	372
Bromley	130	28	157	289	447
Camden	578	162	740	787	1528
City of London	214	67	281	397	678
Croydon	166	35	201	298	499
Ealing	174	39	213	369	582
Enfield	135	32	166	178	344
Greenwich	88	26	114	212	326
Hackney	77	18	95	140	235
Hammersmith and Fulham	192	51	242	435	677
Haringey	78	16	94	181	275
Harrow	81	18	99	143	242
Havering	133	31	164	180	345
Hillingdon	357	91	448	323	771
Hounslow	116	26	142	232	374
Islington	136	32	168	277	445
Kensington and Chelsea	868	246	1114	807	1921
Kingston upon Thames	107	23	129	209	338
Lambeth	210	77	287	509	797
Lewisham	67	16	83	132	215

Merton	81	19	100	223	323
Newham	237	61	298	156	454
Redbridge	84	19	103	150	253
Richmond upon Thames	116	33	148	321	470
Southwark	193	64	256	536	793
Sutton	59	13	72	129	201
Tower Hamlets	251	79	330	418	748
Waltham Forest	60	13	74	127	200
Wandsworth	130	30	160	302	463
Westminster	2610	736	3346	2891	6238

Table 2b: Tourism spend by Borough for different visitor types in 2009 (£ million)

2009	Overseas	Domestic	Total Staying	Day visits*	Total
Barking and Dagenham	47	10	57	63	120
Barnet	155	31	186	392	579
Bexley	87	19	106	134	240
Brent	125	26	151	223	375
Bromley	128	23	151	263	414
Camden	591	163	754	771	1525
City of London	213	70	283	412	695
Croydon	162	31	193	261	454
Ealing	171	35	206	361	567
Enfield	130	29	159	157	316
Greenwich	89	27	116	213	329
Hackney	73	17	90	129	219
Hammersmith and Fulham	264	62	326	453	779
Haringey	77	14	91	162	253
Harrow	86	16	102	130	232

Havering	114	24	138	179	317
Hillingdon	346	88	434	278	712
Hounslow	122	25	147	223	370
Islington	131	31	162	269	431
Kensington and Chelsea	882	250	1132	736	1868
Kingston upon Thames	116	23	139	196	335
Lambeth	201	68	269	464	733
Lewisham	80	17	97	132	230
Merton	88	17	105	223	328
Newham	180	45	225	155	380
Redbridge	96	19	115	141	257
Richmond upon Thames	120	26	146	323	469
Southwark	193	60	253	526	779
Sutton	63	11	74	109	183
Tower Hamlets	311	96	407	411	818
Waltham Forest	65	13	78	121	200
Wandsworth	133	26	159	261	420
Westminster	2676	726	3402	2666	6068

* Note that figures for day visits have been provided separately on account of their experimental nature.

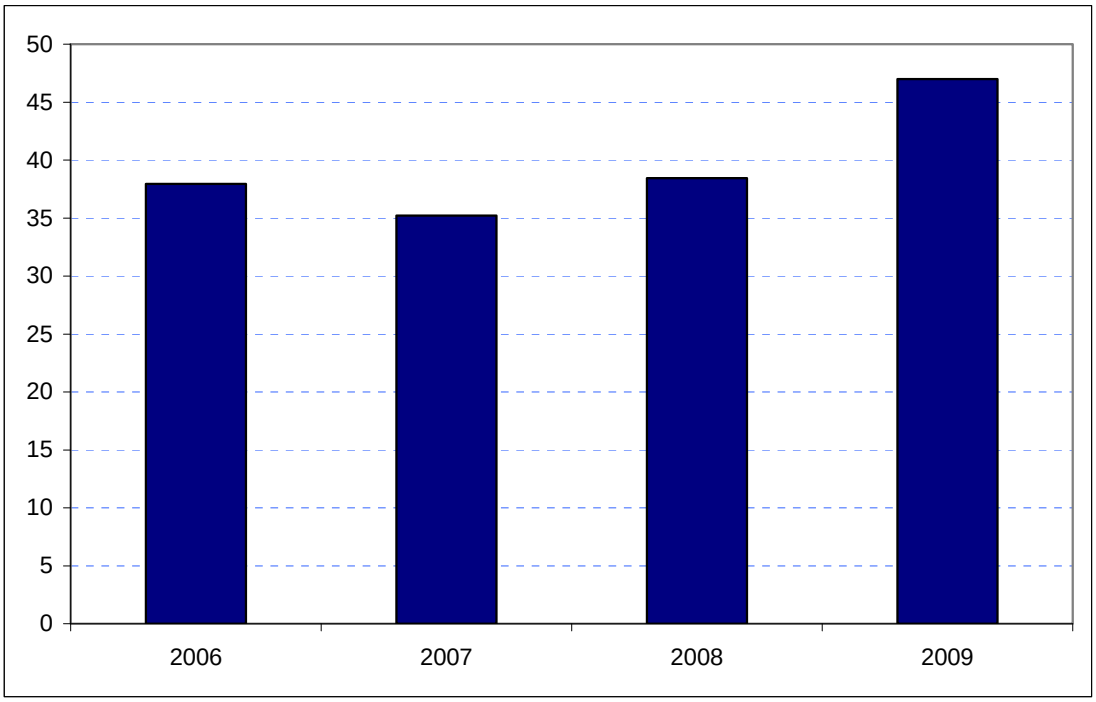
Chapter 3: Estimates for individual Boroughs

The remainder of this document presents the modelled estimates for each of the 32 Boroughs and the City of London, comparing the results for 2008 and 2009 with those for 2006 and 2007. Attention is drawn to the fact that there have been some small methodological changes – which are outlined in Chapter 1.

Barking and Dagenham
Borough Rank: 33

Estimates in Figure 5.1 show an increase in overseas visitor spend in Barking & Dagenham from its 2007 level. Spending rose from £35 million in 2007 to £47 million in 2009.

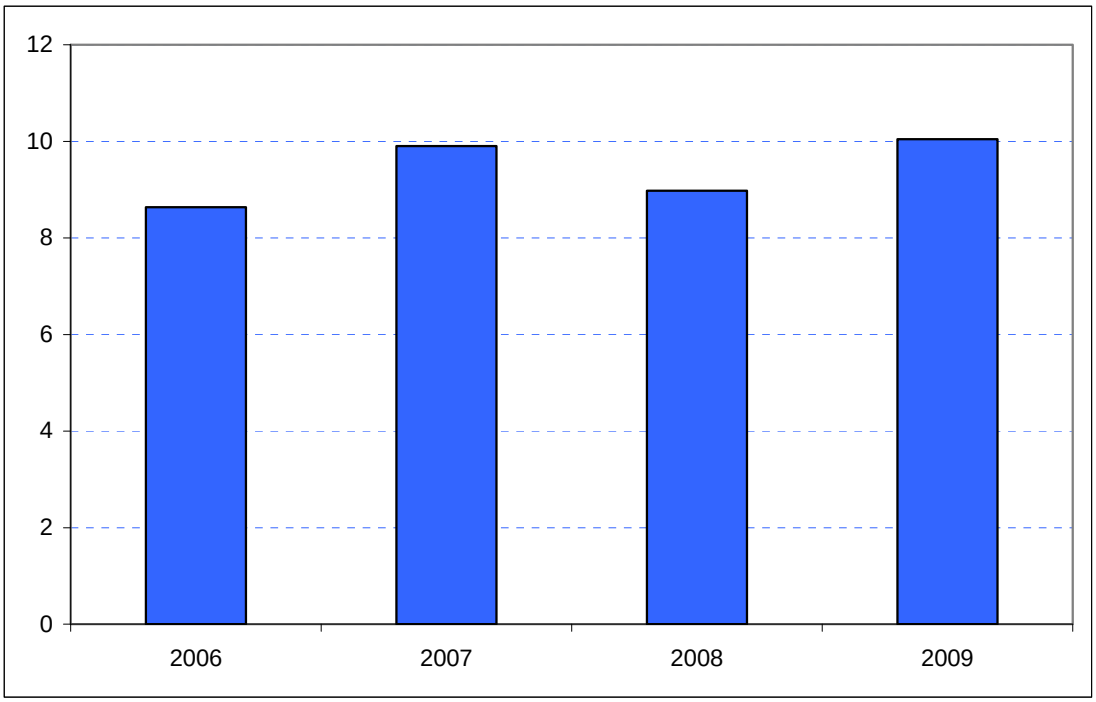
Figure 5.1: Overseas tourism expenditure in Barking & Dagenham (£ millions)



Sources: IPS, BRES, LDA surveys and GLA Economics calculations

Figure 6.1 contains estimates by domestic overnight visitors in Barking & Dagenham. These indicate growth in receipts from £9 million in 2006 to £10 million in 2009.

Figure 6.1: Domestic staying tourism expenditure in Barking & Dagenham (£ millions)



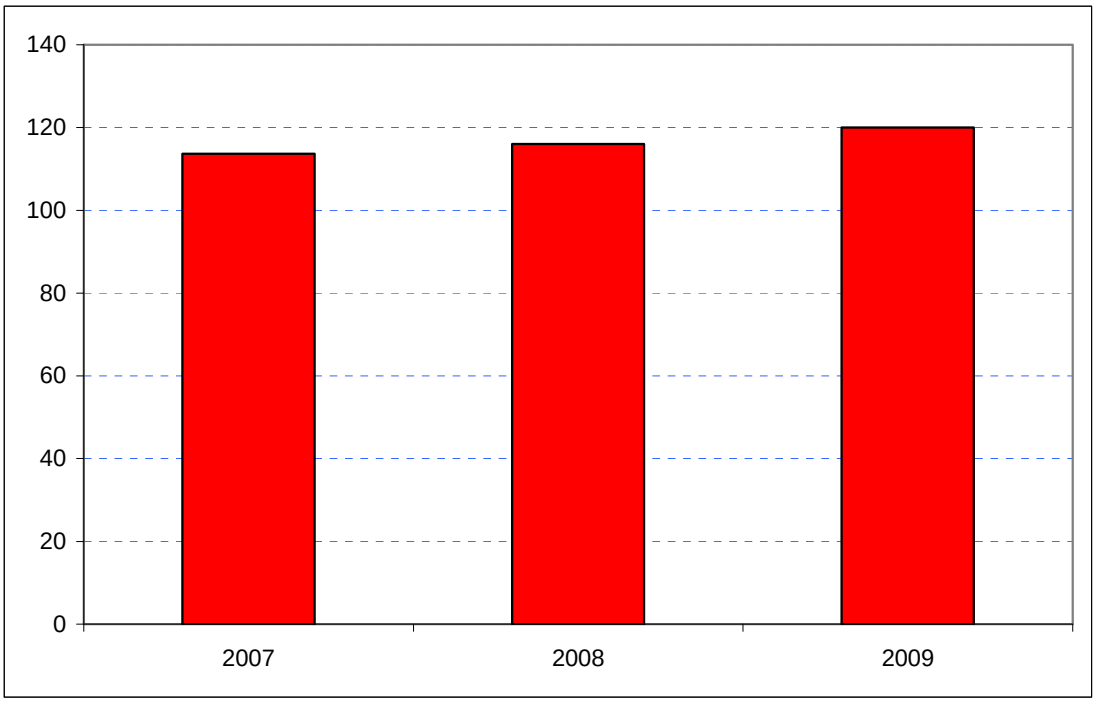
Sources: UKTS, BRES, LDA surveys and GLA Economics calculations

An experimental estimate of day visitor spend is provided in Tables 2a and 2b of Chapter 2. It should be emphasised that these are modelled estimates and further details of the data issues presented by day visitor tourism can be found in GLA Economics' Current Issues Note 29[7]. Details of the modelling and changes to it from previous LATI estimates can be found in the methodology section.

When the experimental day visitor estimates are included, total estimated tourism expenditure in Barking & Dagenham has risen gradually since 2007 from £114 million to £116 million in 2008 and to £120 million in 2009 as shown in Figure 7.1. Data for 2006 were excluded from the graphic as they would have introduced the additional problem of a change of survey basis for the day visitor estimates prior to 2007.

[7] http://www.london.gov.uk/publication/estimating-contribution-leisure-day-visitors-londons-tourism-industry
GLA Economics - Estimating the contribution of leisure day visitors to London's tourism industry (March 2011)

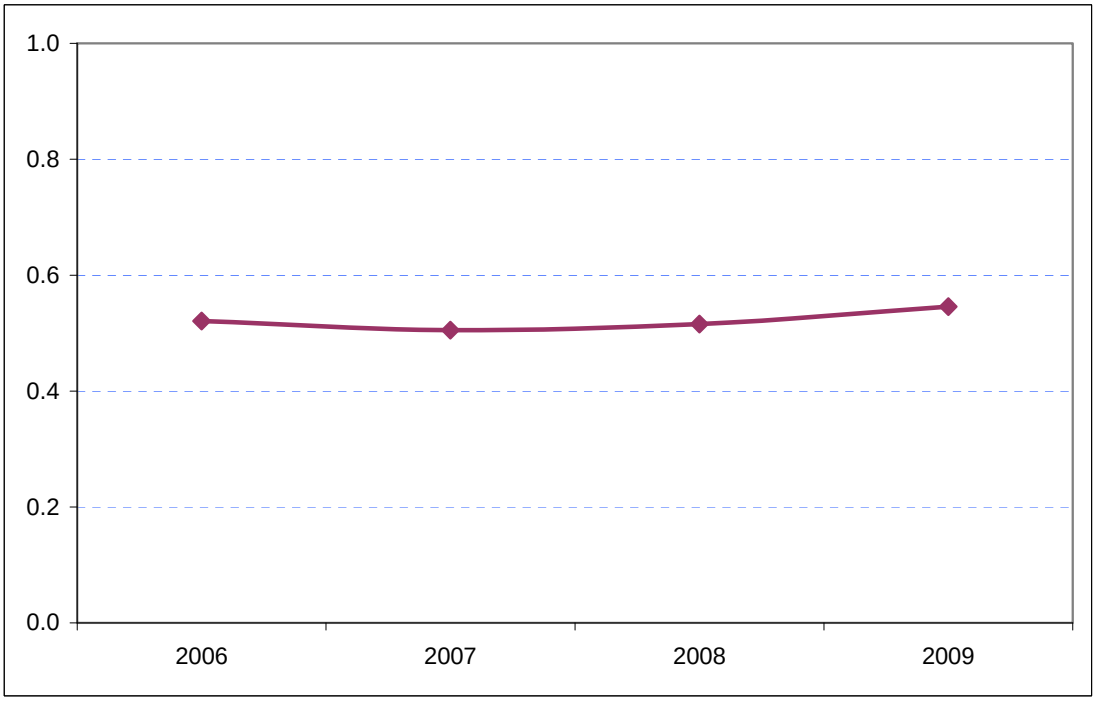
Figure 7.1: Estimates of total tourism expenditure in Barking & Dagenham including experimental estimates of day visitor spend (£ millions)



Sources: IPS, UKTS, BRES, LDA surveys and GLA Economics calculations

Figure 8.1 shows that Barking & Dagenham represents a very small share of London's total tourism expenditure although this has increased slightly. In 2006 the Borough accounted for 0.5 per cent of the capital's tourism expenditure. This fell back very slightly in 2007 but has subsequently risen to just under 0.6 per cent.

Figure 8.1: Barking & Dagenham's estimated share of total London tourism expenditure (%)

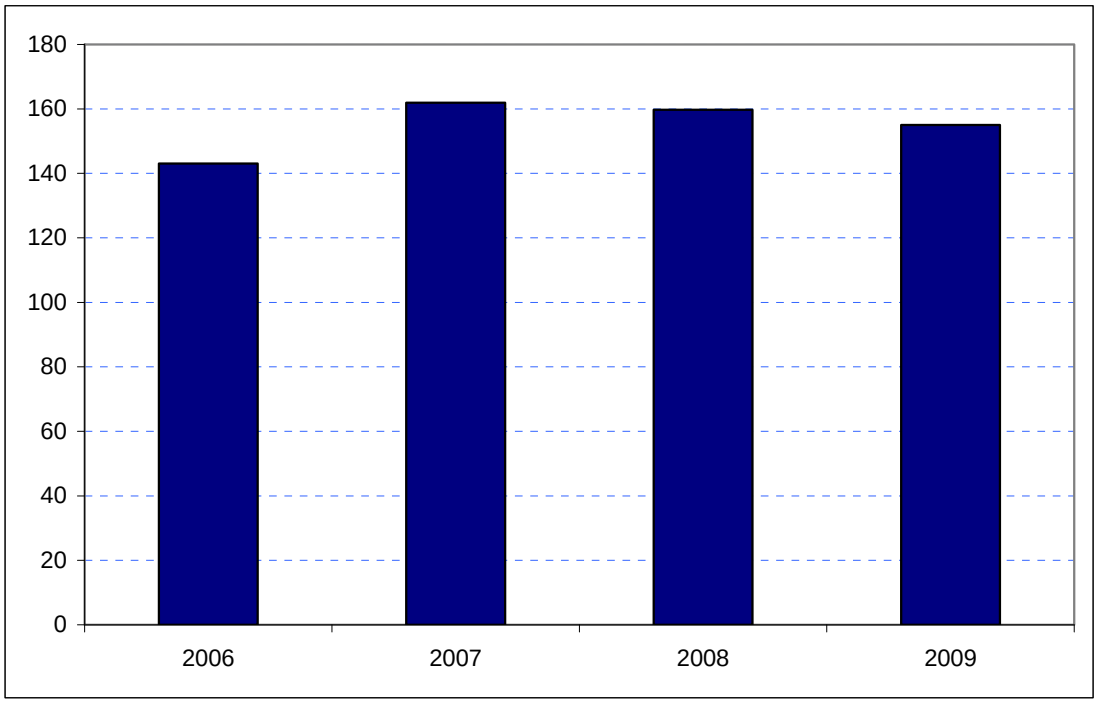


Sources: IPS, UKTS, BRES, LDA surveys and GLA Economics calculations

Barnet
Borough Rank: 10

Estimates in Figure 5.2 show a slight decrease in overseas visitor spend in Barnet from its 2007 level although it is still estimated to be up on 2006. Spending fell from £162 million in 2007 to £160 million in 2008 and to £155 million in 2009.

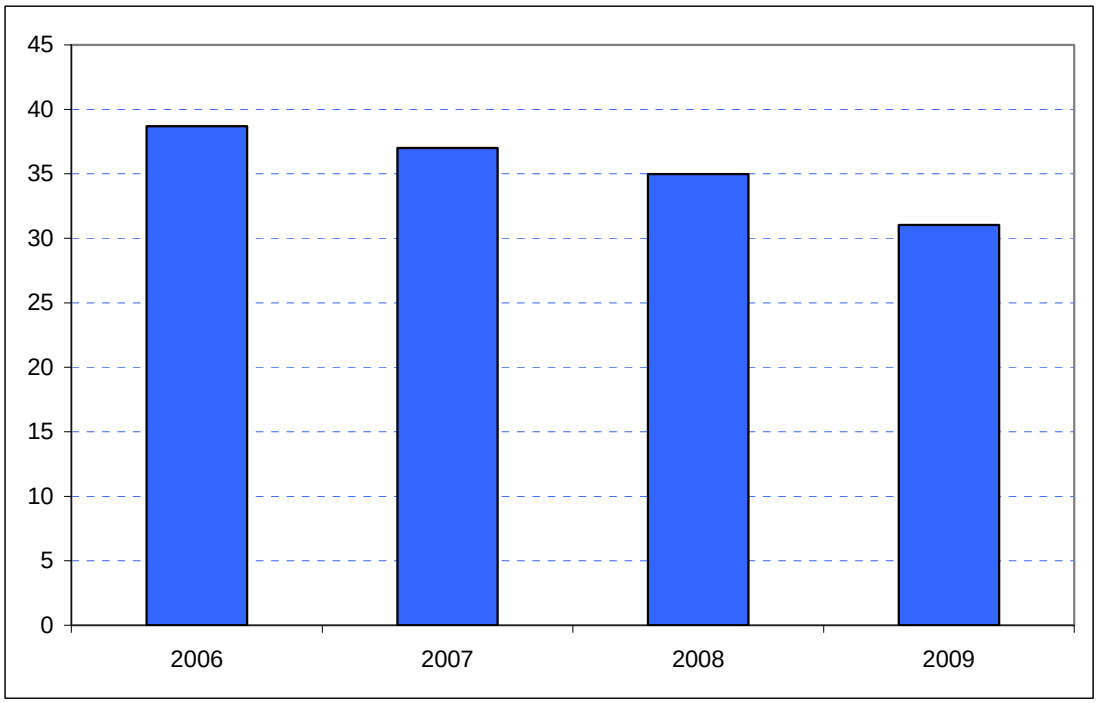
Figure 5.2: Overseas tourism expenditure in Barnet (£ millions)



Sources: IPS, BRES, LDA surveys and GLA Economics calculations

Figure 6.2 contains estimates by domestic overnight visitors in Barnet. These indicate a relatively sharp fall in receipts when compared to 2006. Receipts fell to £37 million in 2007 and were relatively stable in 2008 at £35 million before falling to £31 million in 2009.

Figure 6.2: Domestic staying tourism expenditure in Barnet (£ millions)



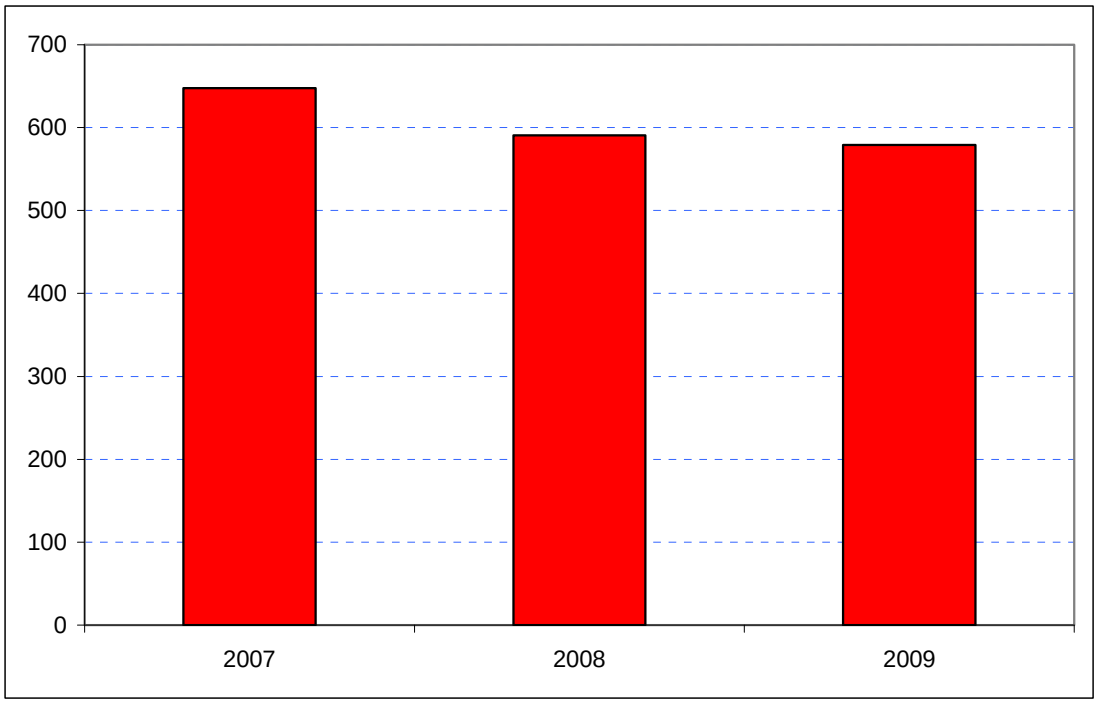
Sources: UKTS, BRES, LDA surveys and GLA Economics calculations

An experimental estimate of day visitor spend is provided in Tables 2a and 2b of Chapter 2. It should be emphasised that these are modelled estimates and further details of the data issues presented by day visitor tourism can be found in GLA Economics' Current Issues Note 29[8]. Details of the modelling and changes to it from previous LATI estimates can be found in the methodology section.

When the experimental day visitor estimates are included, total estimated tourism expenditure in Barnet has fallen since 2007 from £650 million to £591 million in 2008 and to £579 million in 2009 as shown in Figure 7.2. Data for 2006 were excluded from the graphic as they would have introduced the additional problem of a change of survey basis for the day visitor estimates prior to 2007.

[8] http://www.london.gov.uk/publication/estimating-contribution-leisure-day-visitors-londons-tourism-industry
GLA Economics - Estimating the contribution of leisure day visitors to London's tourism industry (March 2011)

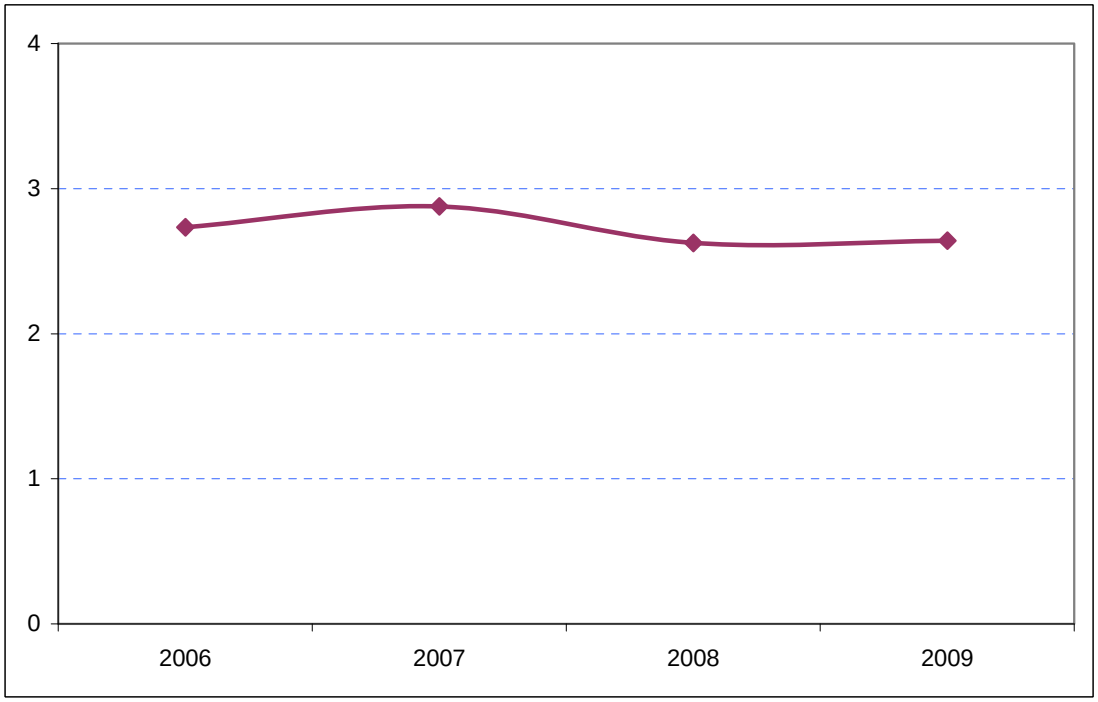
Figure 7.2: Estimates of total tourism expenditure in Barnet including experimental estimates of day visitor spend (£ millions)



Sources: IPS, UKTS, BRES, LDA surveys and GLA Economics calculations

Figures 8.2 shows that Barnet represents just under 3 per cent of London's total tourism spend. This peaked at 2.9 per cent in 2007 and has since fallen back to 2.6 per cent.

Figure 8.2: Barnet's estimated share of total London tourism expenditure (%)

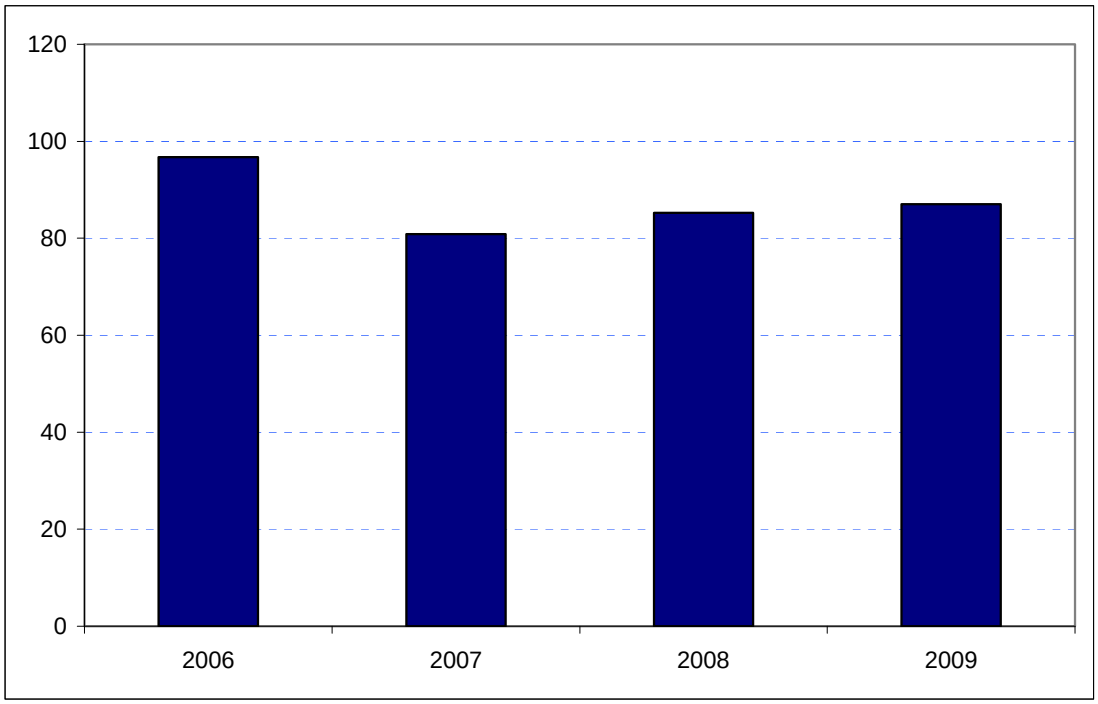


Sources: IPS, UKTS, BRES, LDA surveys and GLA Economics calculations

Bexley
Borough Rank: 27

Estimates in Figure 5.3 show an increase in overseas visitor spend in Bexley from its 2007 level although expenditure is still estimated to be down on 2006. Spending rose from £81 million in 2007 to £85 million in 2008 and to £87 million in 2009.

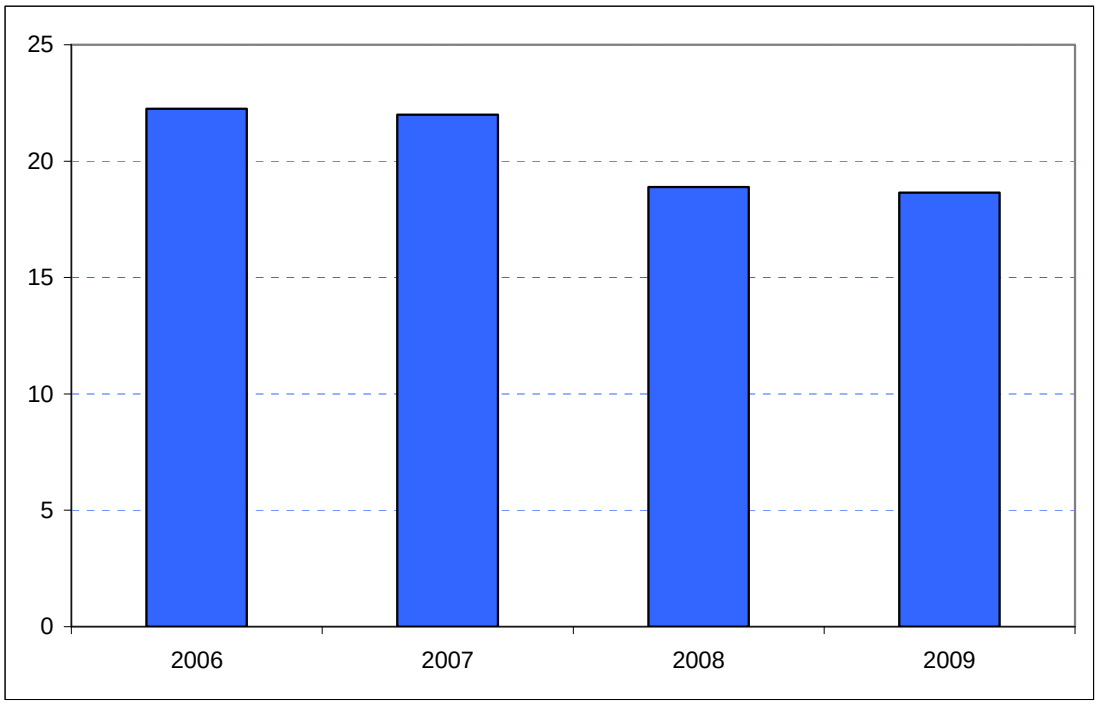
Figure 5.3: Overseas tourism expenditure in Bexley (£ millions)



Sources: IPS, BRES, LDA surveys and GLA Economics calculations

Figure 6.3 contains estimates by domestic overnight visitors in Bexley. These indicate a considerable fall in receipts when compared to 2006. Receipts fell marginally to £22 million in 2007, more steeply to £19 million in 2008 and were broadly stable in 2009.

Figure 6.3: Domestic staying tourism expenditure in Bexley (£ millions)



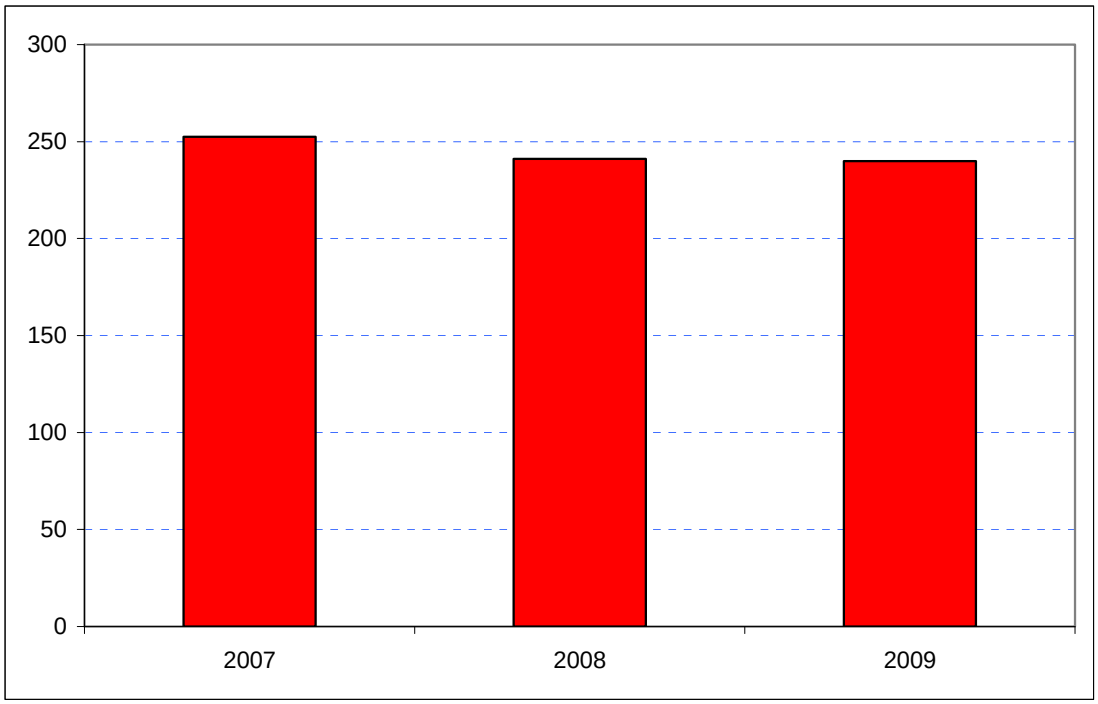
Sources: UKTS, BRES, LDA surveys and GLA Economics calculations

An experimental estimate of day visitor spend is provided in Tables 2a and 2b of Chapter 2. It should be emphasised that these are modelled estimates and further details of the data issues presented by day visitor tourism can be found in GLA Economics' Current Issues Note 29[9]. Details of the modelling and changes to it from previous LATI estimates can be found in the methodology section.

When the experimental day visitor estimates are included, total estimated tourism expenditure in Bexley has fallen since 2007 from £254 million to £241 million in 2008 and to £240 million in 2009 as shown in Figure 7.3. Data for 2006 were excluded from the graphic as they would have introduced the additional problem of a change of survey basis for the day visitor estimates prior to 2007.

[9] http://www.london.gov.uk/publication/estimating-contribution-leisure-day-visitors-londons-tourism-industry
GLA Economics - Estimating the contribution of leisure day visitors to London's tourism industry (March 2011)

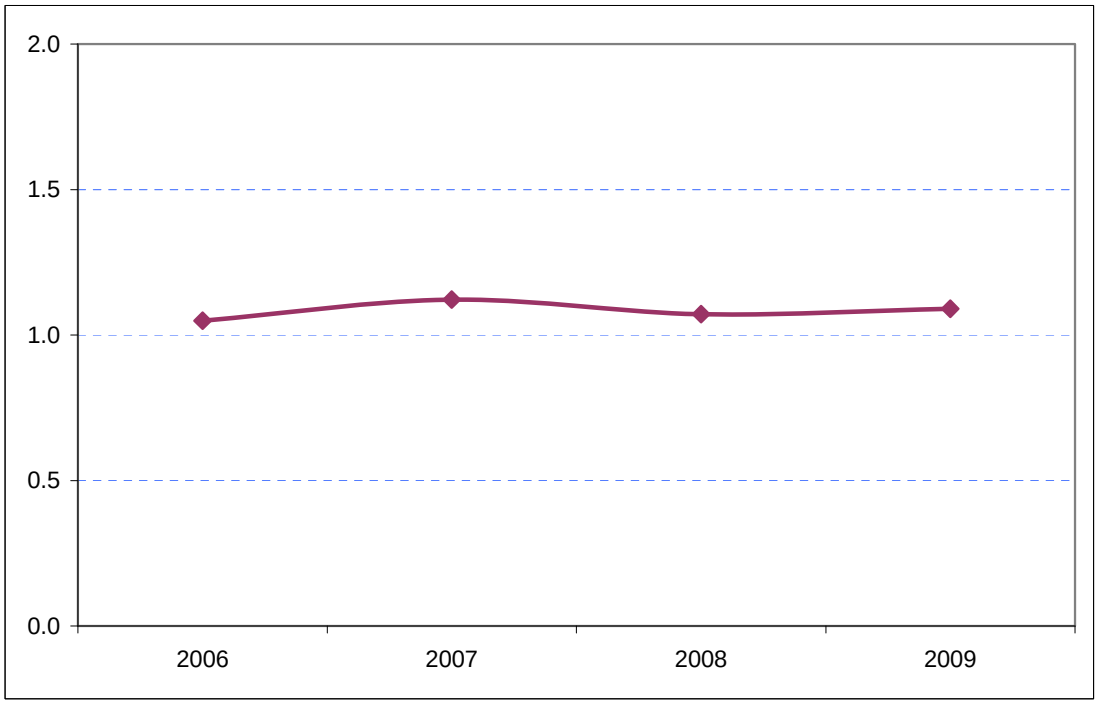
Figure 7.3: Estimates of total tourism expenditure in Bexley including experimental estimates of day visitor spend (£ millions)



Sources: IPS, UKTS, BRES, LDA surveys and GLA Economics calculations

Figures 8.3 shows that Bexley represents just over 1 per cent of London's total tourism spend. This is estimated to have peaked in 2007 before falling back slightly in subsequent years.

Figure 8.3: Bexley's estimated share of total London tourism expenditure (%)

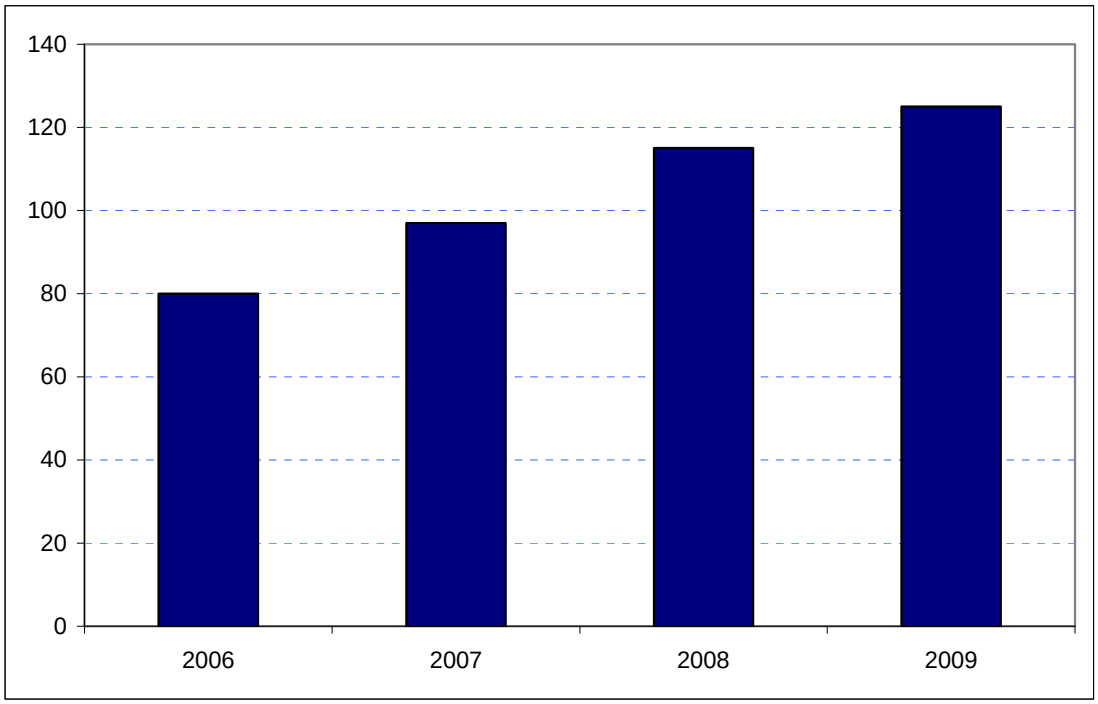


Sources: IPS, UKTS, BRES, LDA surveys and GLA Economics calculations

Brent
Borough Rank: 18

Estimates in Figure 5.4 show an increase in overseas visitor spend in Brent from its 2007 level. Spending rose from £97 million in 2007 to £115 million in 2008 and to £125 million in 2009.

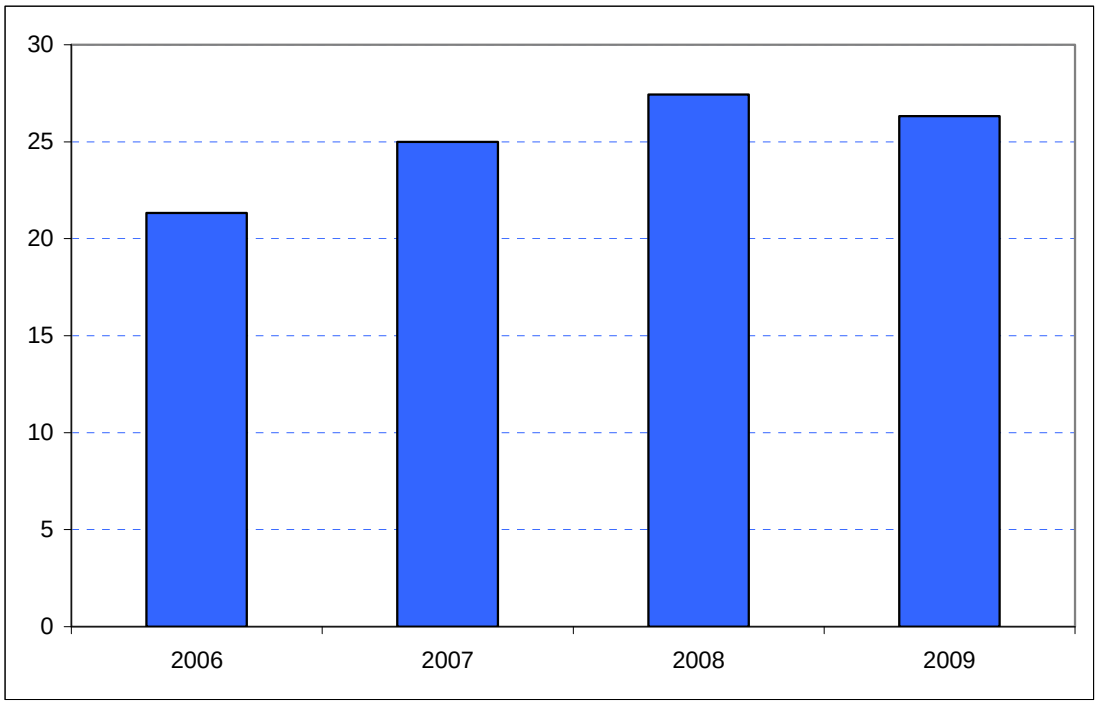
Figure 5.4: Overseas tourism expenditure in Brent (£ millions)



Sources: IPS, BRES, LDA surveys and GLA Economics calculations

Figure 6.4 contains estimates by domestic overnight visitors in Brent. These indicate an overall net increase in receipts when compared to 2006. Receipts rose to £25 million in 2007, peaking at £27 million in 2008 prior to falling back in 2009 to £26 million.

Figure 6.4: Domestic staying tourism expenditure in Brent (£ millions)



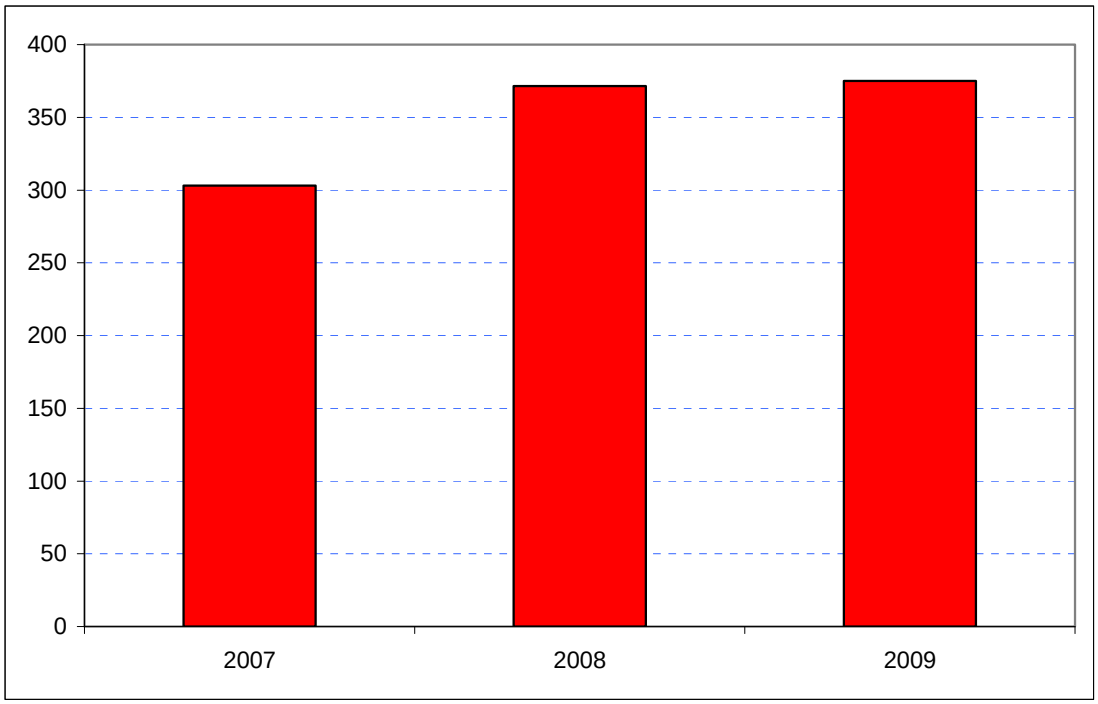
Sources: UKTS, BRES, LDA surveys and GLA Economics calculations

An experimental estimate of day visitor spend is provided in Tables 2a and 2b of Chapter 2. It should be emphasised that these are modelled estimates and further details of the data issues presented by day visitor tourism can be found in GLA Economics' Current Issues Note 29[10]. Details of the modelling and changes to it from previous LATI estimates can be found in the methodology section.

When the experimental day visitor estimates are included, total estimated tourism expenditure in Brent has risen since 2007 from £304 million to £372 million in 2008 and to £375 million in 2009 as shown in Figure 7.4. Data for 2006 were excluded from the graphic as they would have introduced the additional problem of a change of survey basis for the day visitor estimates prior to 2007.

[10] http://www.london.gov.uk/publication/estimating-contribution-leisure-day-visitors-londons-tourism-industry
GLA Economics - Estimating the contribution of leisure day visitors to London's tourism industry (March 2011)

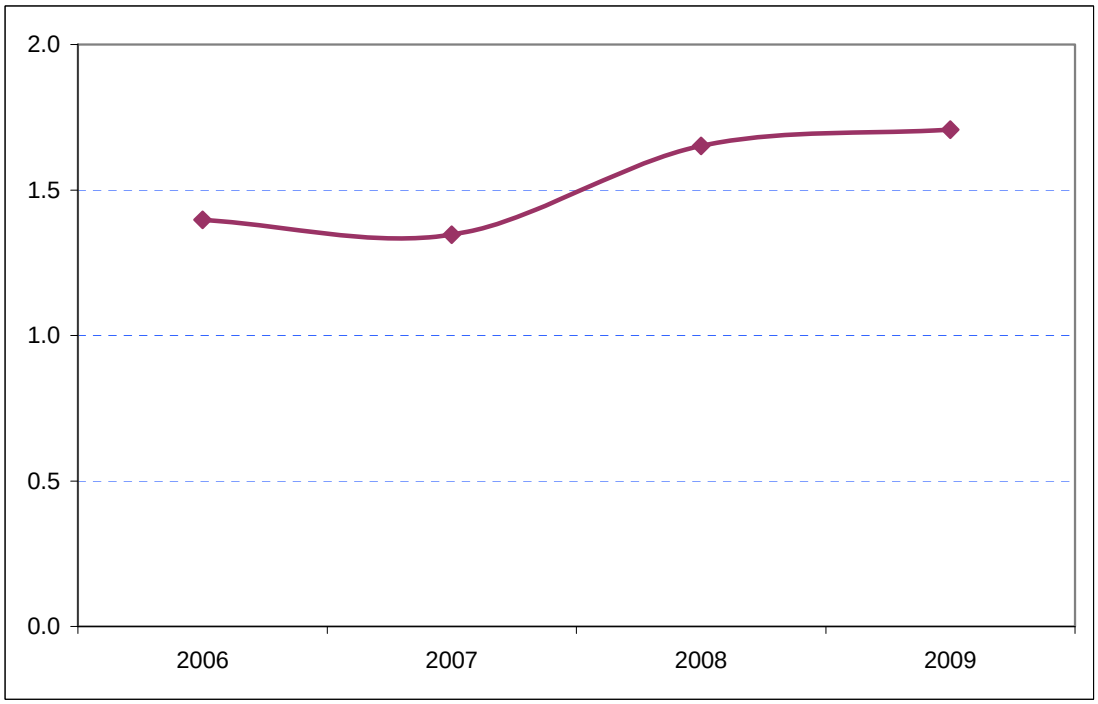
Figure 7.4: Estimates of total tourism expenditure in Brent including experimental estimates of day visitor spend (£ millions)



Sources: IPS, UKTS, BRES, LDA surveys and GLA Economics calculations

Figures 8.4 shows that Brent's estimated share of total London tourism spend has risen from 1.3 per cent in 2007 to 1.7 per cent in 2009.

Figure 8.4: Brent's estimated share of total London tourism expenditure (%)

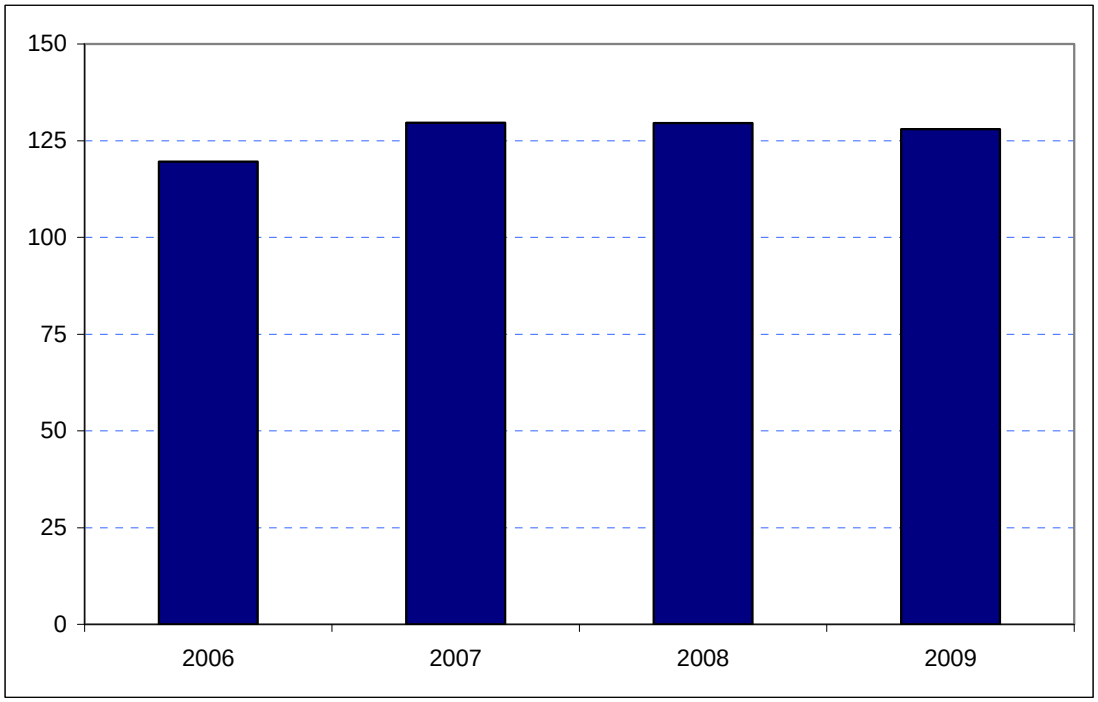


Sources: IPS, UKTS, BRES, LDA surveys and GLA Economics calculations

Bromley
Borough Rank: 16

Estimates in Figure 5.5 show a slight fall in overseas visitor spend in Bromley since 2007. Between 2007 and 2008 spending was constant at £130 million but has since fallen to £128 million. Nevertheless, overseas visitor spend in the Borough appears relatively constant.

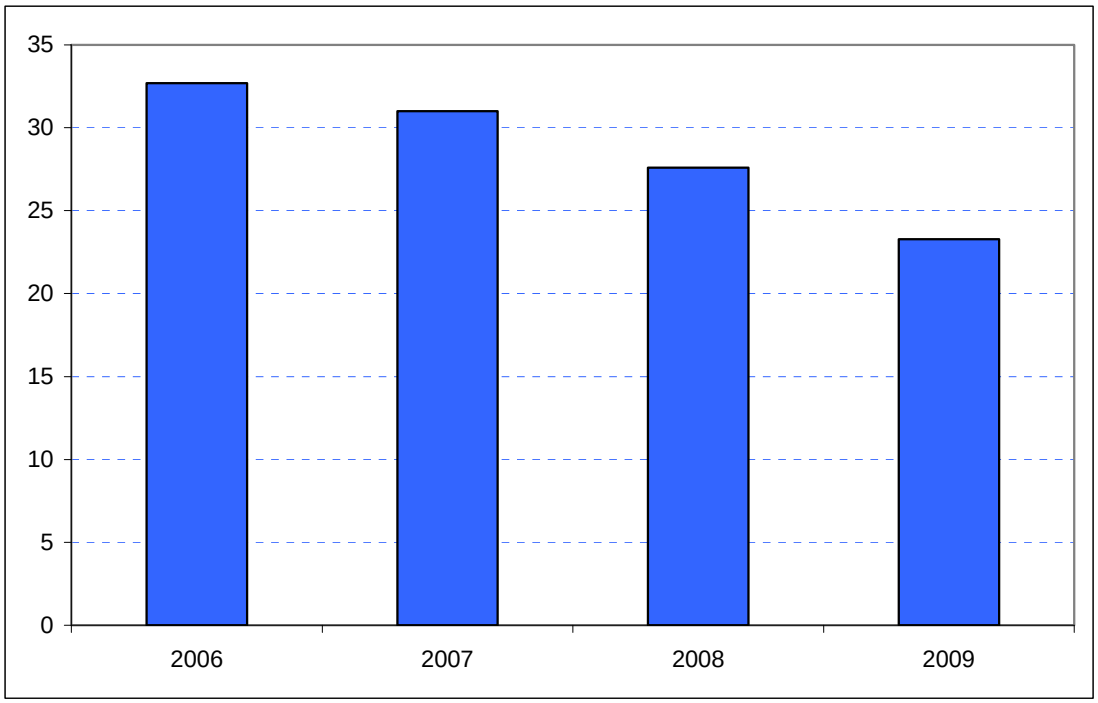
Figure 5.5: Overseas tourism expenditure in Bromley (£ millions)



Sources: IPS, BRES, LDA surveys and GLA Economics calculations

Figure 6.5 contains estimates by domestic overnight visitors in Bromley. In contrast to the overseas visitor patterns, these indicate a steady decline when compared to 2006. Receipts fell from £33 million to £31 million in 2007, £28 million in 2008 and £23 million in 2009.

Figure 6.5: Domestic staying tourism expenditure in Bromley (£ millions)



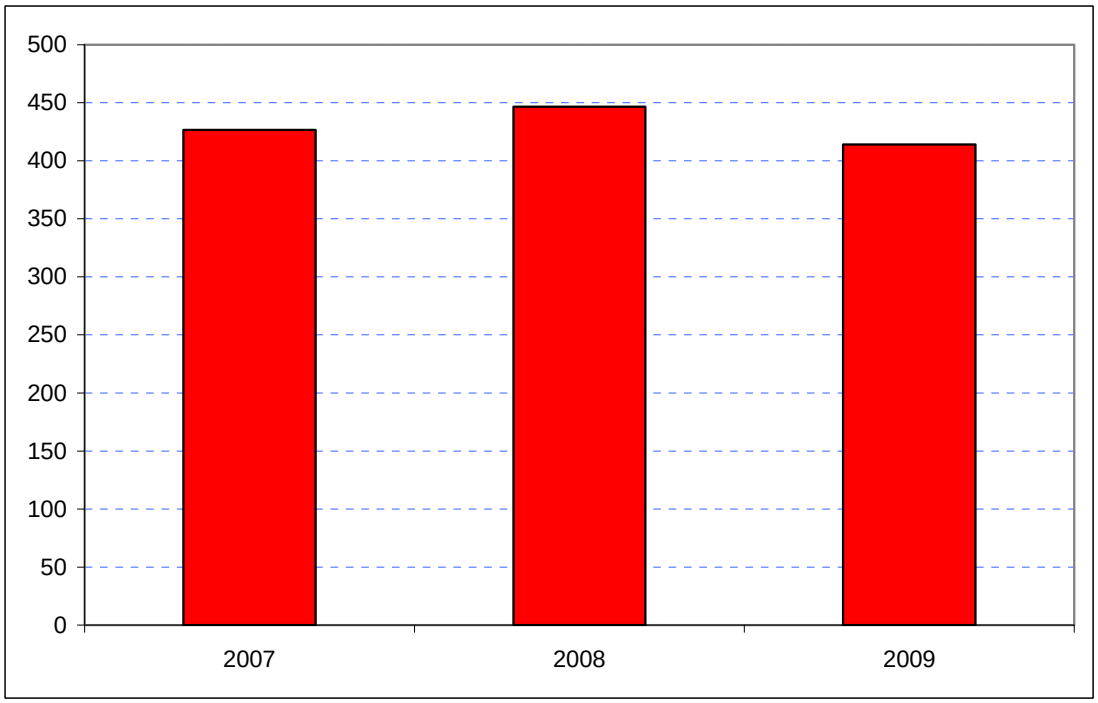
Sources: UKTS, BRES, LDA surveys and GLA Economics calculations

An experimental estimate of day visitor spend is provided in Tables 2a and 2b of Chapter 2. It should be emphasised that these are modelled estimates and further details of the data issues presented by day visitor tourism can be found in GLA Economics' Current Issues Note 29[11]. Details of the modelling and changes to it from previous LATI estimates can be found in the methodology section.

When the experimental day visitor estimates are included, total estimated tourism expenditure in Bromley has shown a net fall from 2007. Receipts rose from £428 million in 2007 to £447 million in 2008 before falling to £414 million as shown in Figure 7.5. Data for 2006 were excluded from the graphic as they would have introduced the additional problem of a change of survey basis for the day visitor estimates prior to 2007.

[11] http://www.london.gov.uk/publication/estimating-contribution-leisure-day-visitors-londons-tourism-industry
GLA Economics - Estimating the contribution of leisure day visitors to London's tourism industry (March 2011)

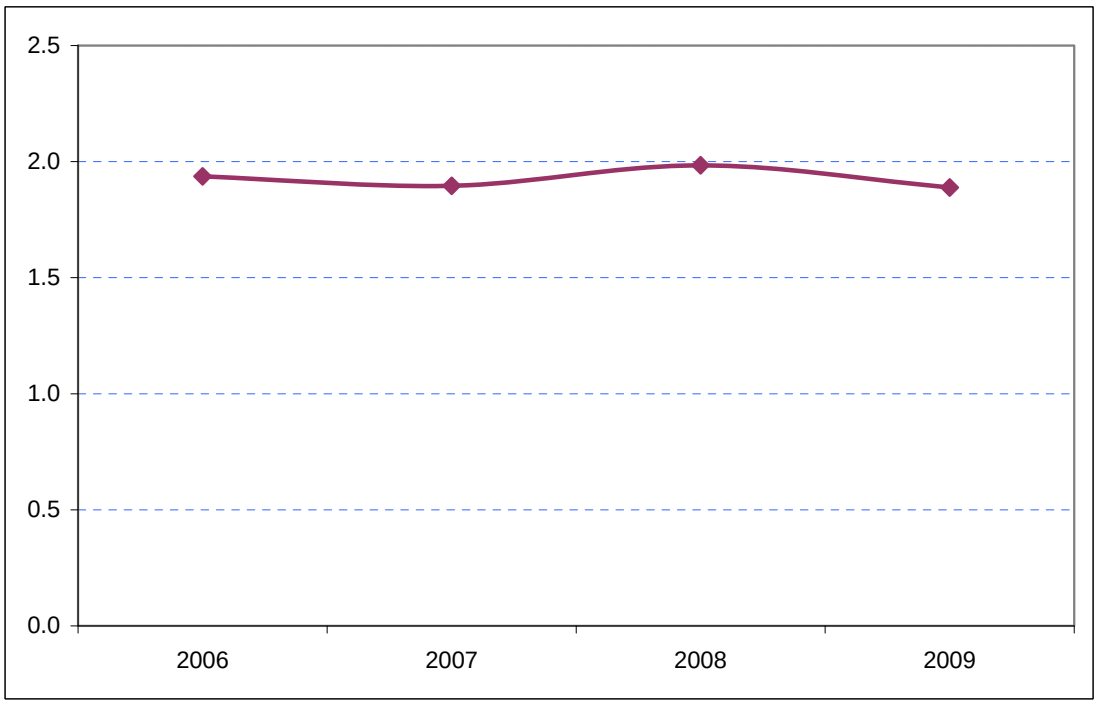
Figure 7.5: Estimates of total tourism expenditure in Bromley including experimental estimates of day visitor spend (£ millions)



Sources: IPS, UKTS, BRES, LDA surveys and GLA Economics calculations

Figures 8.5 shows that Bromley accounts for just under 2 per cent of London's tourism spend and that this has been relatively constant over the four year period.

Figure 8.5: Bromley's estimated share of total London tourism expenditure (%)

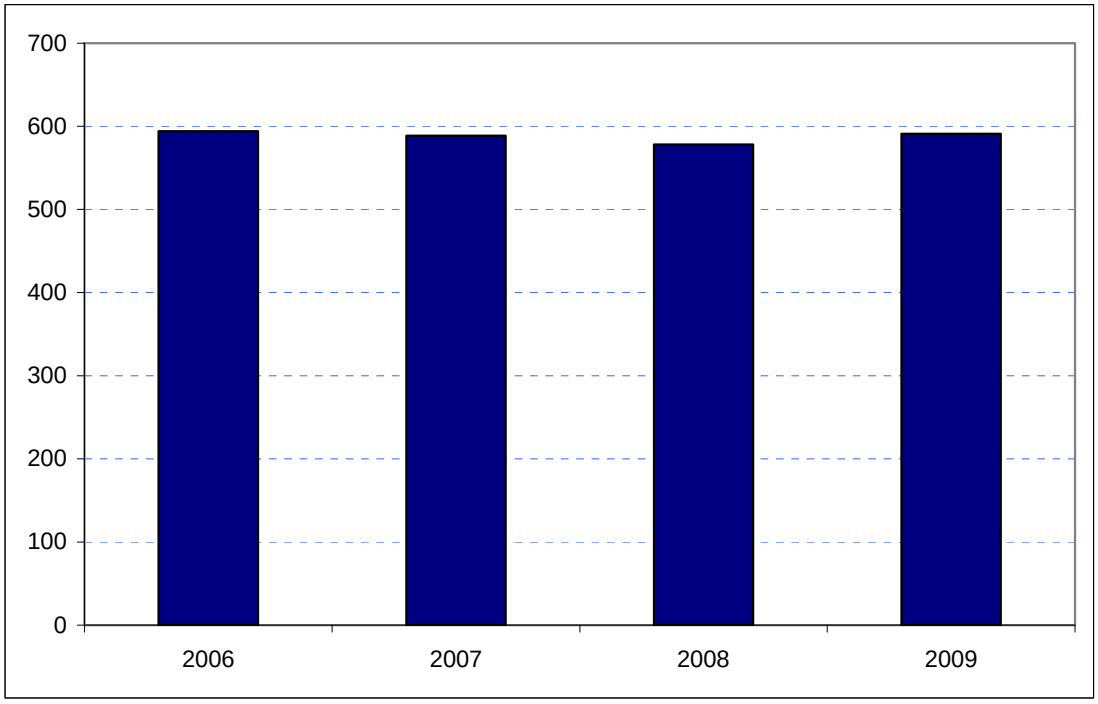


Sources: IPS, UKTS, BRES, LDA surveys and GLA Economics calculations

Camden
Borough Rank: 3

Estimates in Figure 5.6 show a slight net fall in Camden's overseas visitor spend since 2007. In 2008 spending fell from £589 to £578 million but the 2009 figures showed an increase to £591 million. However these fluctuations are relatively marginal with the difference between the four year high point of 2006 and the low point of 2008 amounting to only 2.7 per cent.

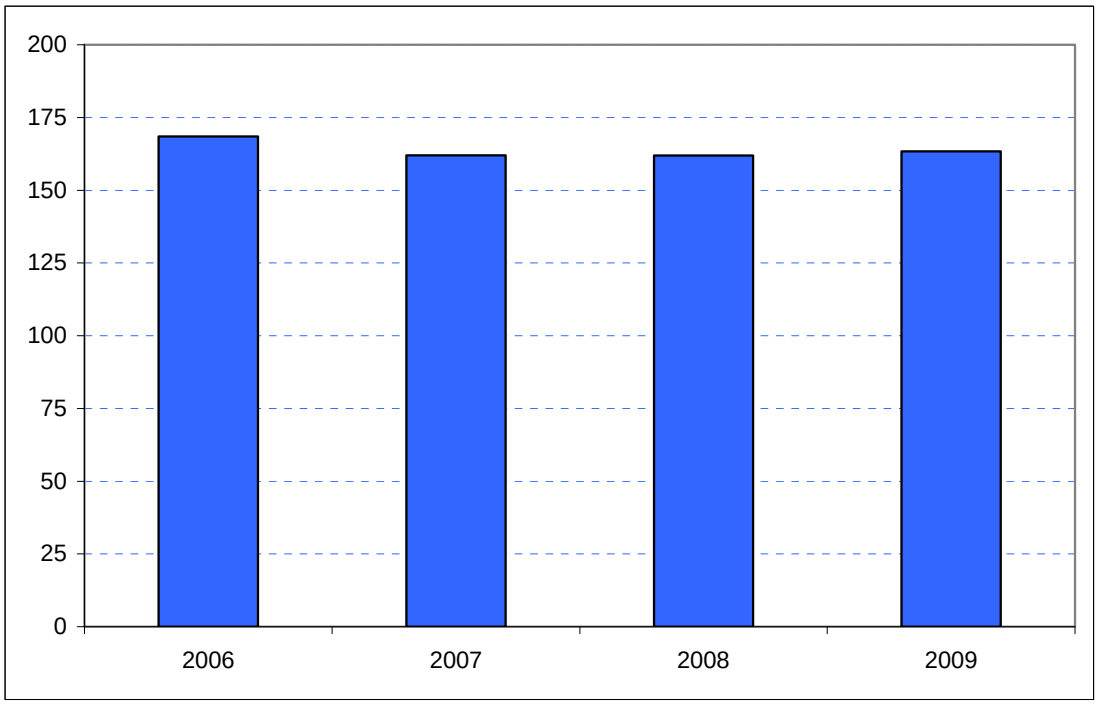
Figure 5.6: Overseas tourism expenditure in Camden (£ millions)



Sources: IPS, BRES, LDA surveys and GLA Economics calculations

Figure 6.6 contains estimates by domestic overnight visitors in Camden. Again, these indicate some marginal variability and a small net loss comparing 2009 with 2006 although receipts are up very slightly when compared to 2007 when they amounted to £162 million. Comparable figures for 2008 and 2009 are £162 million and £163 million respectively – basically showing very little change and a broad picture of stability.

Figure 6.6: Domestic staying tourism expenditure in Camden (£ millions)



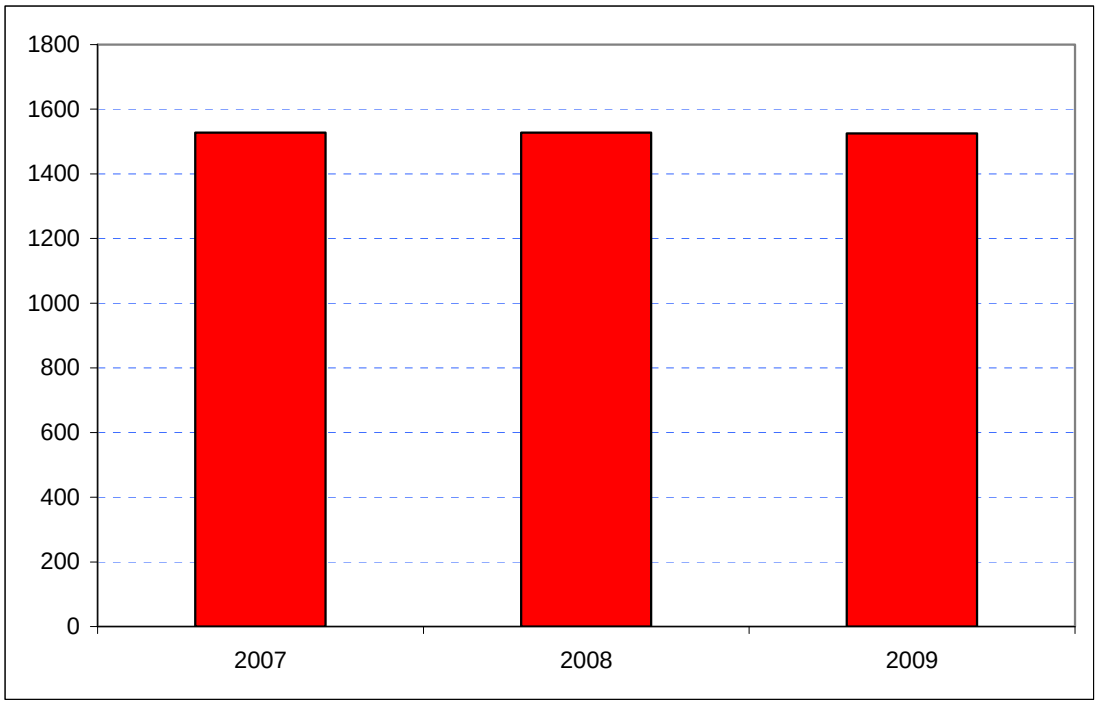
Sources: UKTS, BRES, LDA surveys and GLA Economics calculations

An experimental estimate of day visitor spend is provided in Tables 2a and 2b of Chapter 2. It should be emphasised that these are modelled estimates and further details of the data issues presented by day visitor tourism can be found in GLA Economics' Current Issues Note 29[12]. Details of the modelling and changes to it from previous LATI estimates can be found in the methodology section.

When the experimental day visitor estimates are included, total estimated tourist expenditure was constant between 2007 and 2008 at £1,528 million. In 2009 there was a slight fall to £1,525 million as shown in Figure 7.6. Data for 2006 were excluded from the graphic as they would have introduced the additional problem of a change of survey basis for the day visitor estimates prior to 2007.

[12] http://www.london.gov.uk/publication/estimating-contribution-leisure-day-visitors-londons-tourism-industry
GLA Economics - Estimating the contribution of leisure day visitors to London's tourism industry (March 2011)

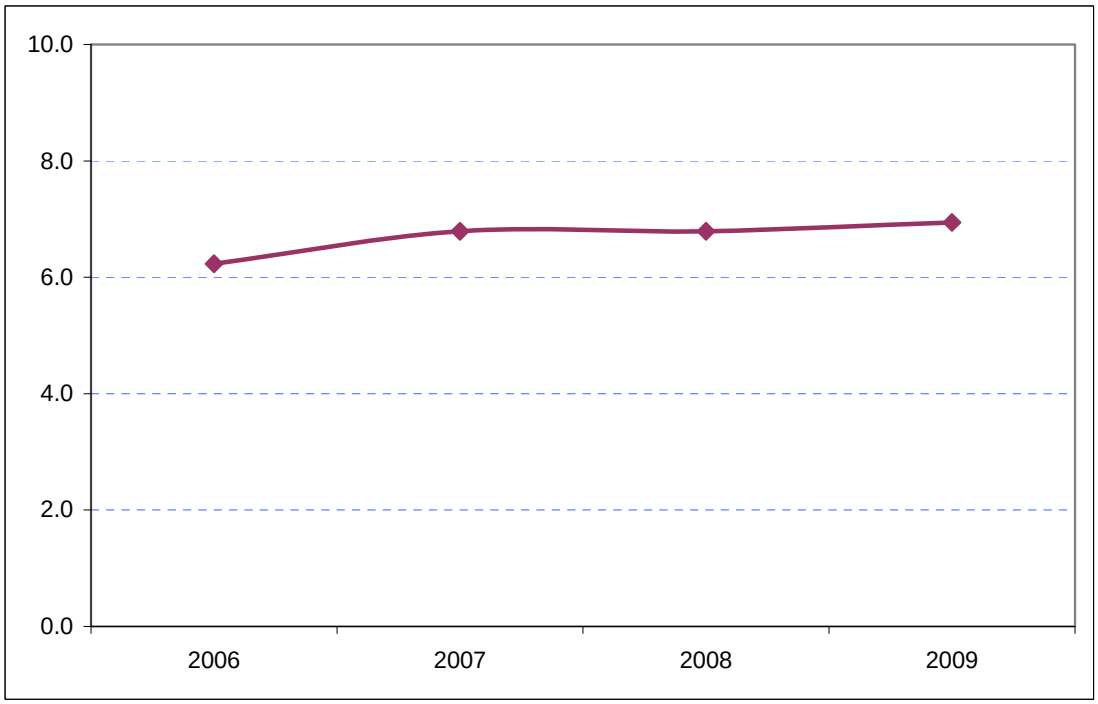
Figure 7.6: Estimates of total tourism expenditure in Camden including experimental estimates of day visitor spend (£ millions)



Sources: IPS, UKTS, BRES, LDA surveys and GLA Economics calculations

Figure 8.6 shows that Camden's share of total London tourism expenditure has risen from 6.2 per cent in 2006 to 7.0 per cent in 2009.

Figure 8.6: Camden's estimated share of total London tourism expenditure (%)

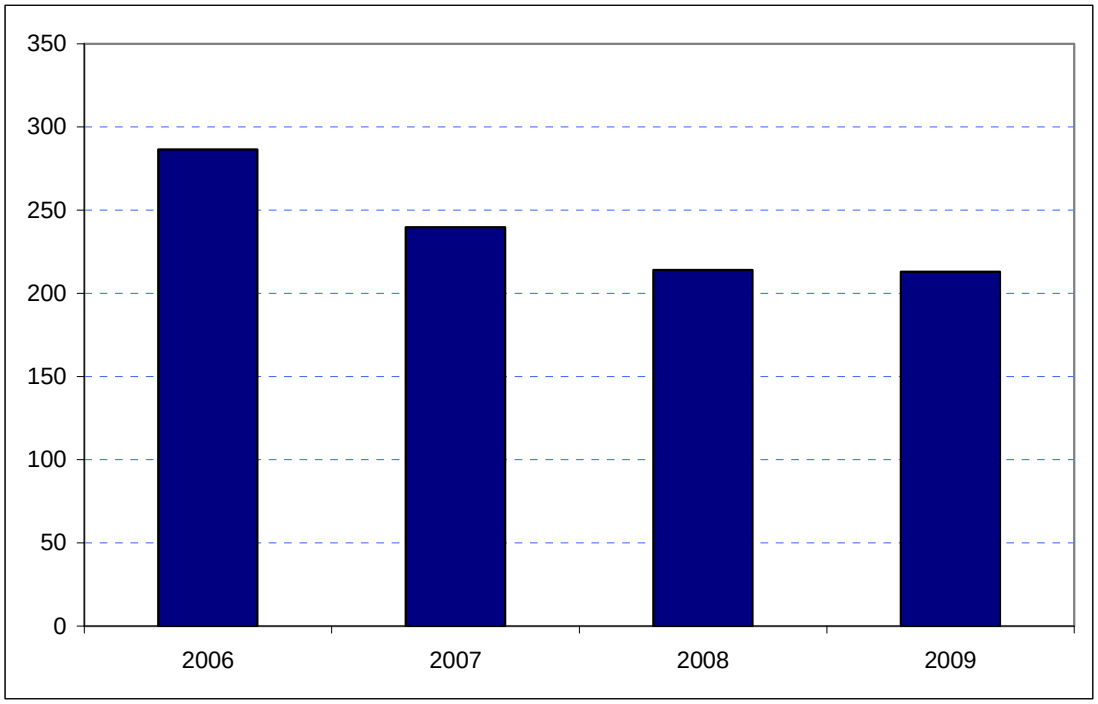


Sources: IPS, UKTS, BRES, LDA surveys and GLA Economics calculations

City of London
Borough Rank: 9

Estimates in Figure 5.7 show a continuation of the fall in the City's overseas visitor spend. In 2008 spending fell from £240 to £214 million and the 2009 figures shows a further slight drop to £213 million. However, the falls are less steep than the decline between 2006 and 2007 indicated by previous estimates.

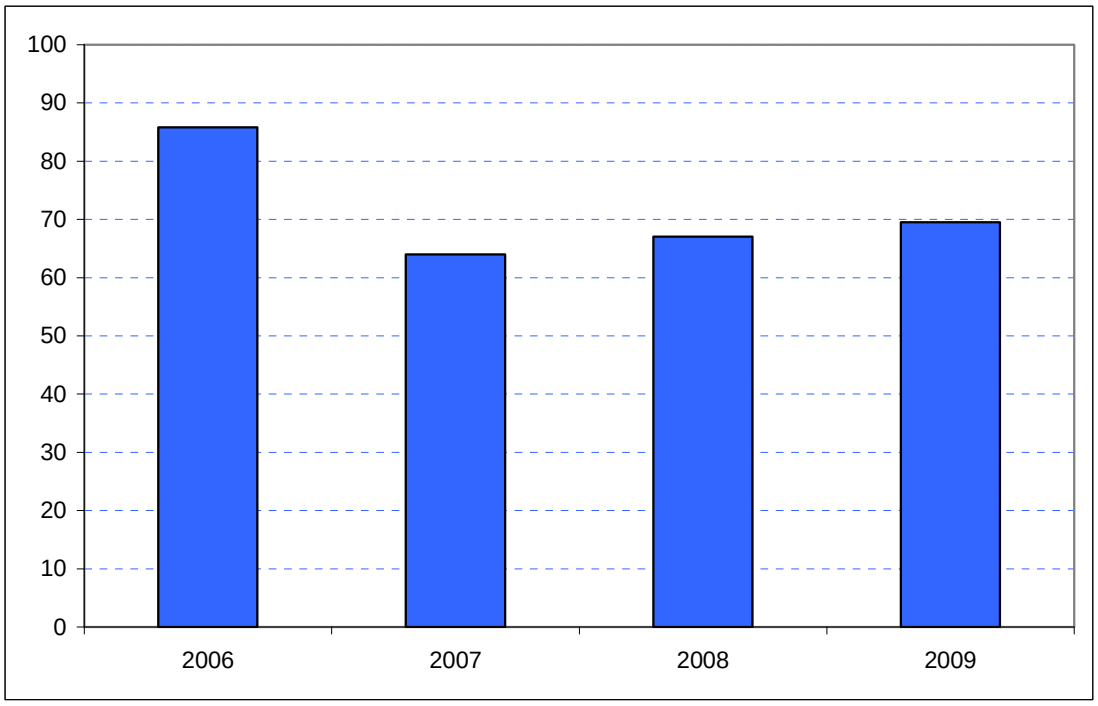
Figure 5.7: Overseas tourism expenditure in the City (£ millions)



Sources: IPS, BRES, LDA surveys and GLA Economics calculations

Figure 6.7 contains estimates by domestic overnight visitors in the City. In contrast to the overseas visitor spend figures these show a steady increase in spend when compared to 2007. In 2007 spend amounted to £64 million. Comparable figures for 2008 and 2009 are £67 million and £70 million respectively. However, domestic overnight spend is still far short of the £86 million it was estimated to be in 2006.

Figure 6.7: Domestic staying tourism expenditure in the City (£ millions)



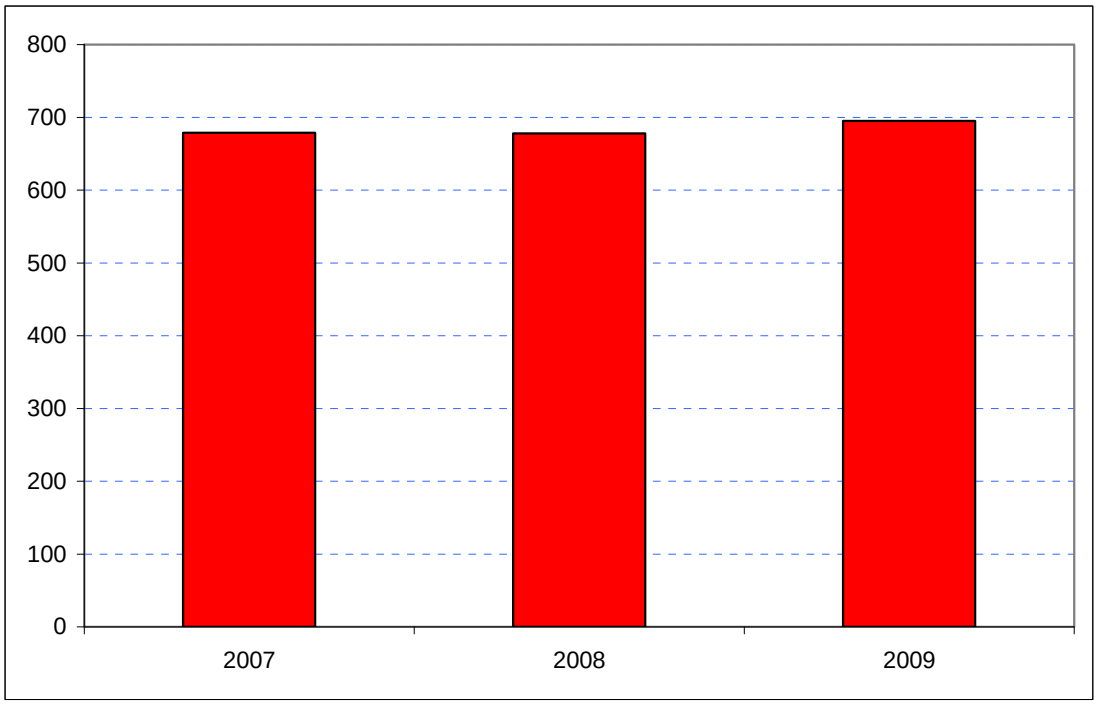
Sources: UKTS, BRES, LDA surveys and GLA Economics calculations

An experimental estimate of day visitor spend is provided in Tables 2a and 2b of Chapter 2. It should be emphasised that these are modelled estimates and further details of the data issues presented by day visitor tourism can be found in GLA Economics' Current Issues Note 29[13]. Details of the modelling and changes to it from previous LATI estimates can be found in the methodology section.

When the experimental day visitor estimates are included, total estimated tourist expenditure showed a net increase between 2007 and 2009. Receipts in 2007 totalled £682 million and this fell only marginally in 2008 to £678 million before increasing to £695 million in 2009 as shown in Figure 7.7. Data for 2006 were excluded from the graphic as they would have introduced the additional problem of a change of survey basis for the day visitor estimates prior to 2007.

[13] http://www.london.gov.uk/publication/estimating-contribution-leisure-day-visitors-londons-tourism-industry
GLA Economics - Estimating the contribution of leisure day visitors to London's tourism industry (March 2011)

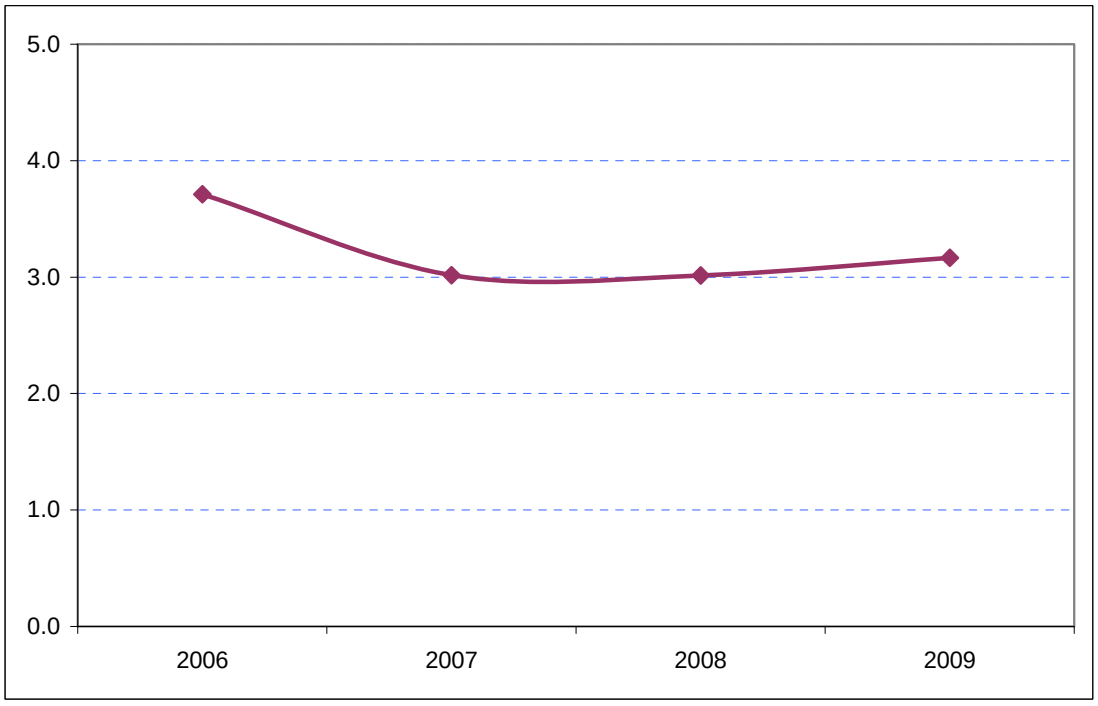
Figure 7.7: Estimates of total tourism expenditure in the City including experimental estimates of day visitor spend (£ millions)



Sources: IPS, UKTS, BRES, LDA surveys and GLA Economics calculations

Figure 8.7 shows that the City's share of total London tourism expenditure has risen from 3.0 per cent in 2007 to 3.2 per cent in 2009. However, this remains short of the 3.7 per cent estimated in 2006.

Figure 8.7: The City's estimated share of total London tourism expenditure (%)

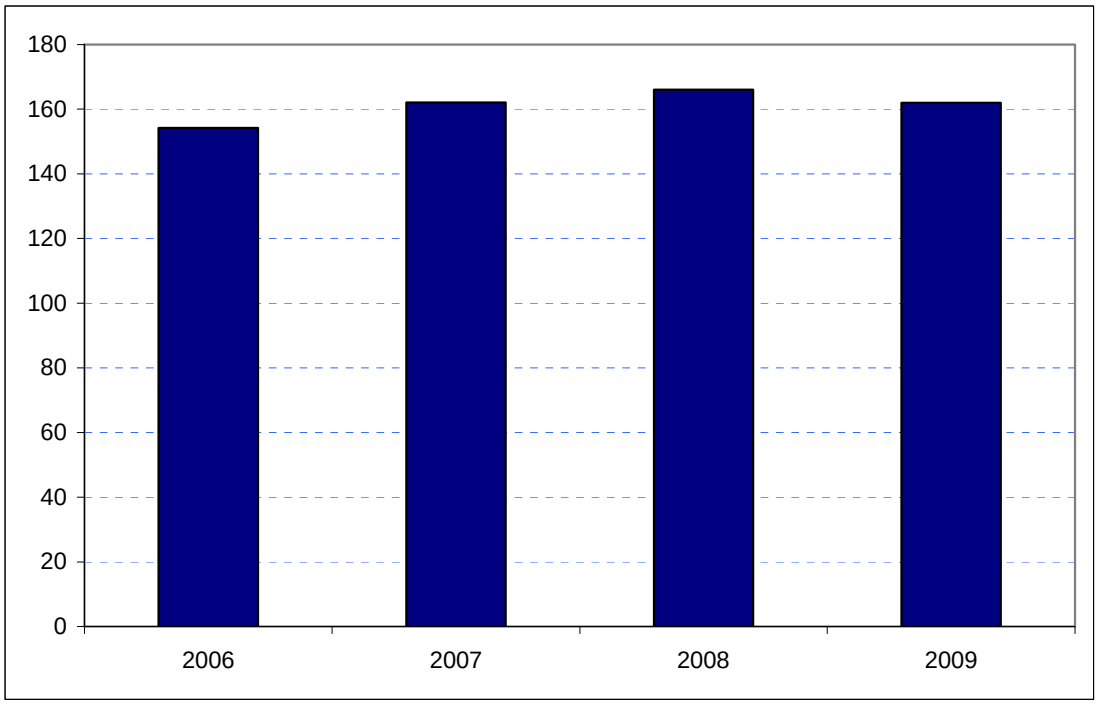


Sources: IPS, UKTS, BRES, LDA surveys and GLA Economics calculations

Croydon
Borough Rank: 12

Estimates in Figure 5.8 show no change in Croydon's overseas visitor spend since 2007. In 2008 spending rose from £162 to £166 million but the 2009 figures show a decrease back down to £162 million. However these fluctuations are relatively marginal and Croydon is amongst the most stable of Boroughs in terms of tourism expenditure – at least between 2007 and 2009.

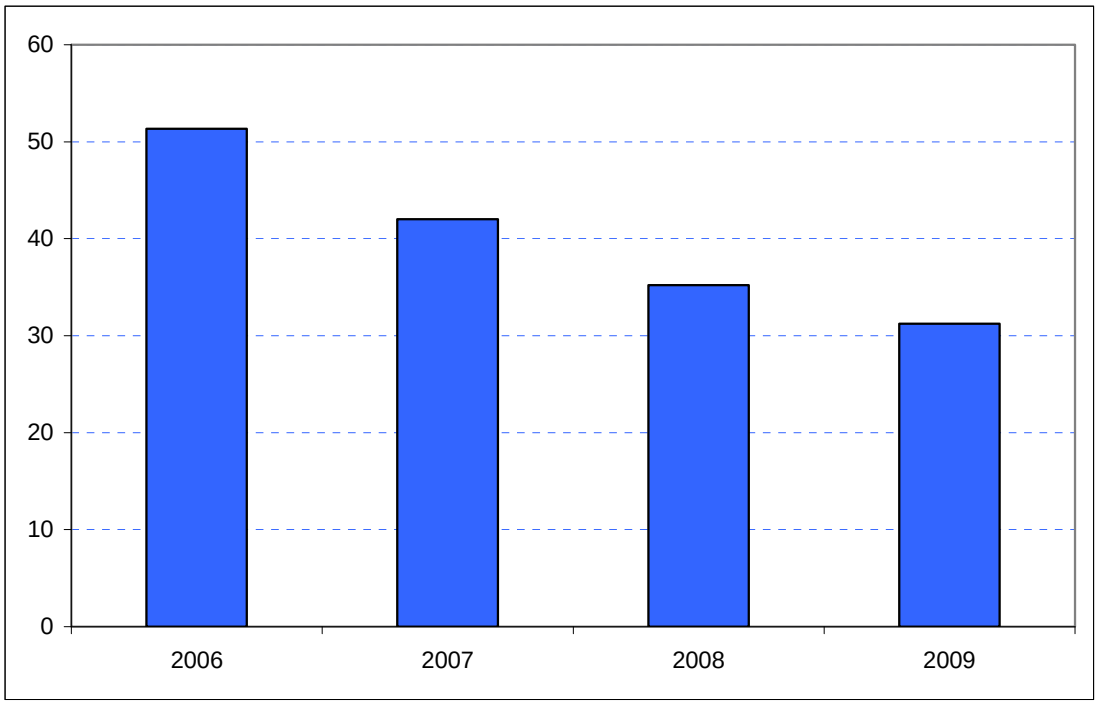
Figure 5.8: Overseas tourism expenditure in Croydon (£ millions)



Sources: IPS, BRES, LDA surveys and GLA Economics calculations

Figure 6.8 contains estimates by domestic overnight visitors in Croydon. These demonstrate the continuation of a trend in falling domestic overnight spend in the Borough which has dropped from £51 million in 2006 to £31 million in 2009, although the falls have become progressively smaller.

Figure 6.8: Domestic staying tourism expenditure in Croydon (£ millions)



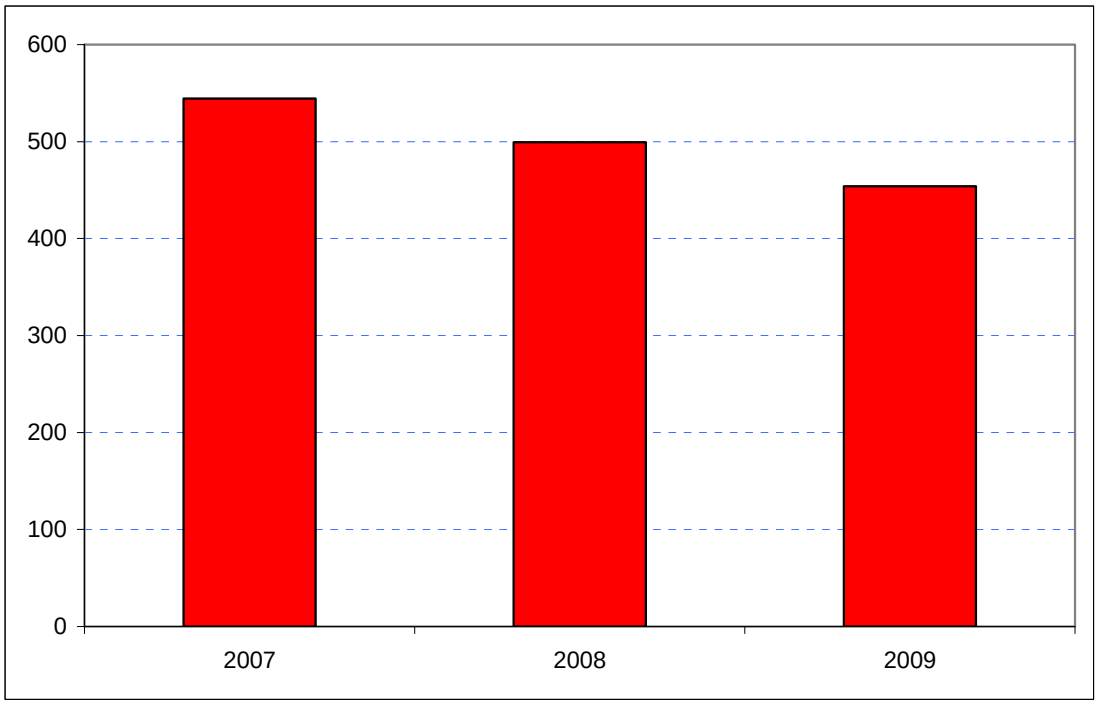
Sources: UKTS, BRES, LDA surveys and GLA Economics calculations

An experimental estimate of day visitor spend is provided in Tables 2a and 2b of Chapter 2. It should be emphasised that these are modelled estimates and further details of the data issues presented by day visitor tourism can be found in GLA Economics' Current Issues Note 29[14]. Details of the modelling and changes to it from previous LATI estimates can be found in the methodology section.

When the experimental day visitor estimates are included, total estimated tourist expenditure fell between 2007 and 2009 as shown in Figure 7.8. Receipts in 2007 had been £547 million, falling to £499 million in 2008 and £454 million in 2009. Data for 2006 were excluded from the graphic as they would have introduced the additional problem of a change of survey basis for the day visitor estimates prior to 2007.

[14] http://www.london.gov.uk/publication/estimating-contribution-leisure-day-visitors-londons-tourism-industry
GLA Economics - Estimating the contribution of leisure day visitors to London's tourism industry (March 2011)

Figure 7.8: Estimates of total tourism expenditure in Croydon including experimental estimates of day visitor spend (£ millions)



Sources: IPS, UKTS, BRES, LDA surveys and GLA Economics calculations

Figure 8.8 shows that Croydon's share of total London tourism expenditure has fallen from 2.4 per cent in both 2006 and 2207 to under 2.1 per cent in 2009.

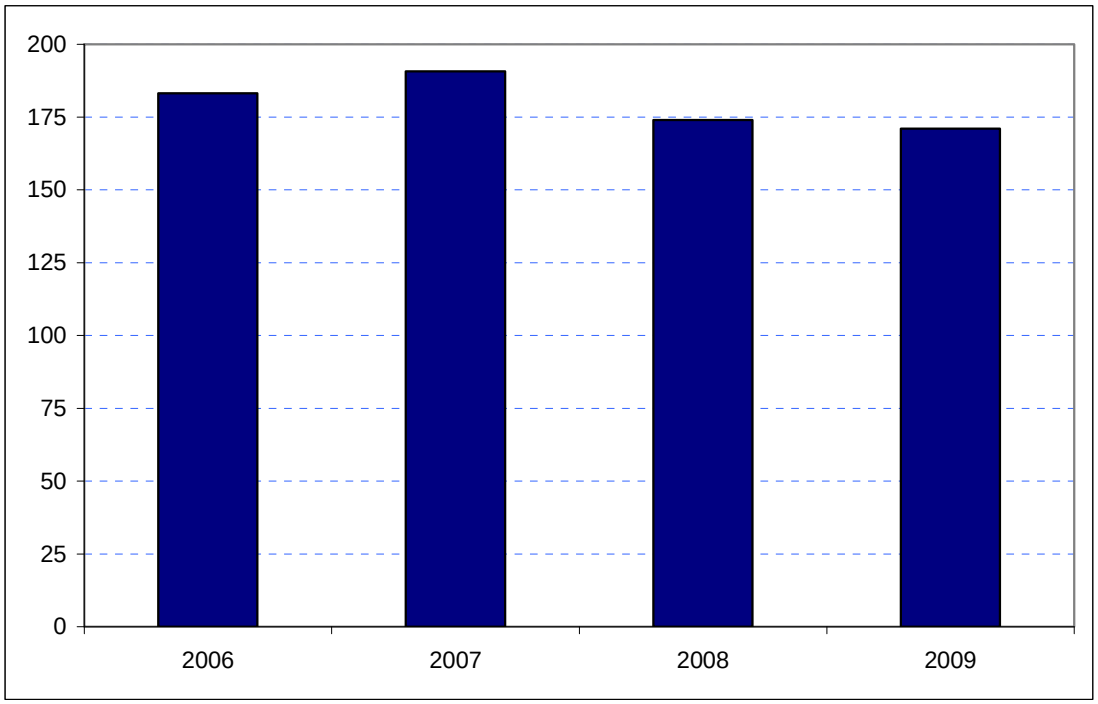
Figure 8.8: Croydon's estimated share of total London tourism expenditure (%)

Sources: IPS, UKTS, BRES, LDA surveys and GLA Economics calculations

Ealing
Borough Rank: 11

Estimates in Figure 5.9 show a marked fall in Ealing's overseas visitor spend. In 2008 spending fell from £191 to £174 million and the 2009 figures shows a further drop to £171 million.

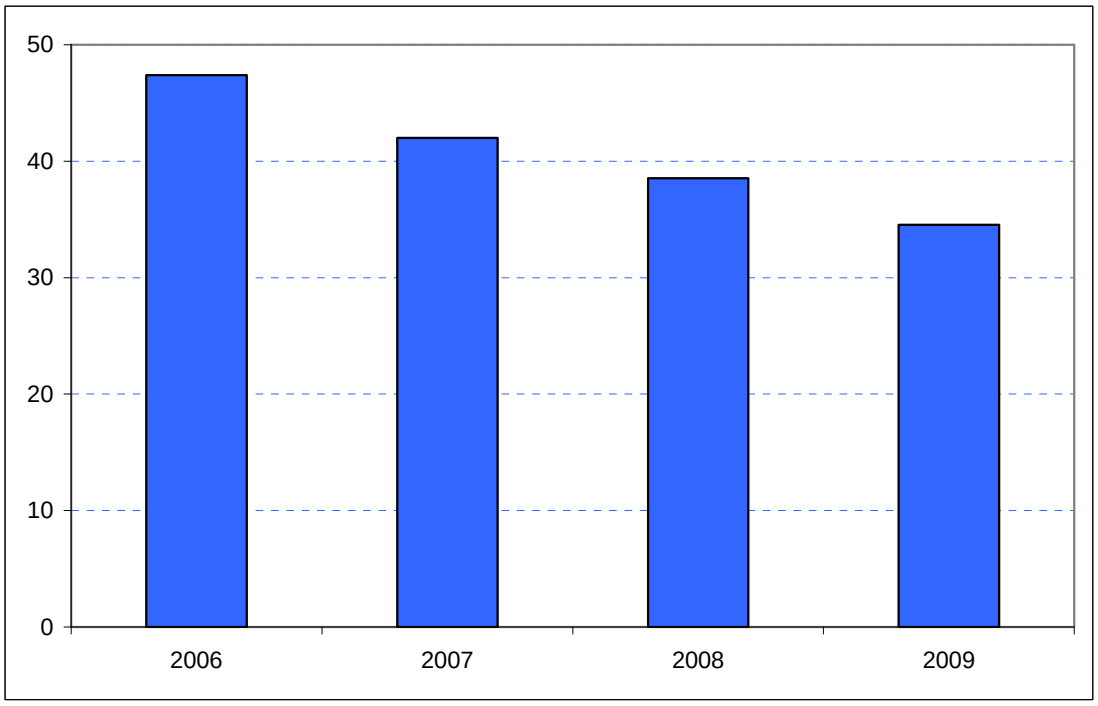
Figure 5.9: Overseas tourism expenditure in Ealing (£ millions)



Sources: IPS, BRES, LDA surveys and GLA Economics calculations

Figure 6.9 contains estimates by domestic overnight visitors in Ealing. These also show steady falls in spend when compared to 2007. In 2006 spend amounted to £47 million; £42 million in the following year. Comparable figures for 2008 and 2009 are £39 million and £35 million respectively.

Figure 6.9: Domestic staying tourism expenditure in Ealing (£ millions)



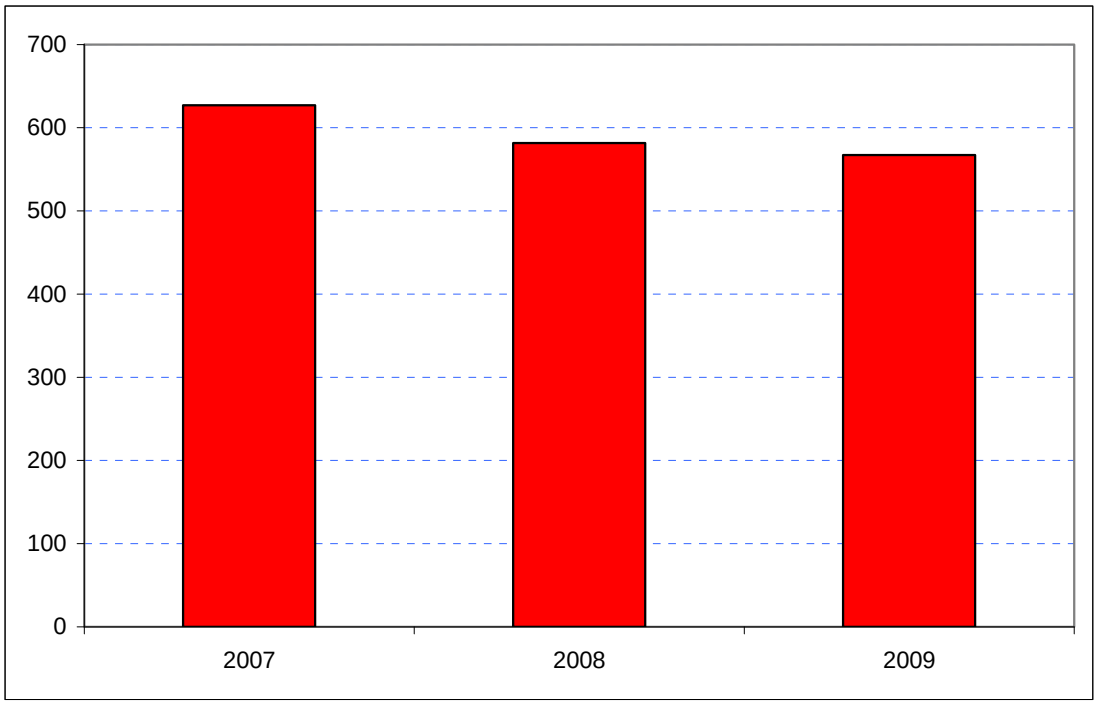
Sources: UKTS, BRES, LDA surveys and GLA Economics calculations

An experimental estimate of day visitor spend is provided in Tables 2a and 2b of Chapter 2. It should be emphasised that these are modelled estimates and further details of the data issues presented by day visitor tourism can be found in GLA Economics' Current Issues Note 29[15]. Details of the modelling and changes to it from previous LATI estimates can be found in the methodology section.

When the experimental day visitor estimates are included, total estimated tourist expenditure showed a net increase between 2007 and 2009. Receipts in 2007 totalled £627 million bit this fell sharply in 2008 to £582 million and less steeply in 2009 to £567 million as shown in Figure 7.9. Data for 2006 were excluded from the graphic as they would have introduced the additional problem of a change of survey basis for the day visitor estimates prior to 2007.

[15] http://www.london.gov.uk/publication/estimating-contribution-leisure-day-visitors-londons-tourism-industry
GLA Economics - Estimating the contribution of leisure day visitors to London's tourism industry (March 2011)

Figure 7.9: Estimates of total tourism expenditure in Ealing including experimental estimates of day visitor spend (£ millions)



Sources: IPS, UKTS, BRES, LDA surveys and GLA Economics calculations

Figure 8.9 shows that Ealing's share of total London tourism expenditure has fallen slightly from 2.8 per cent in 2007 to 2.6 per cent in 2009. However, this is still marginally higher than the Borough's 2006 share.

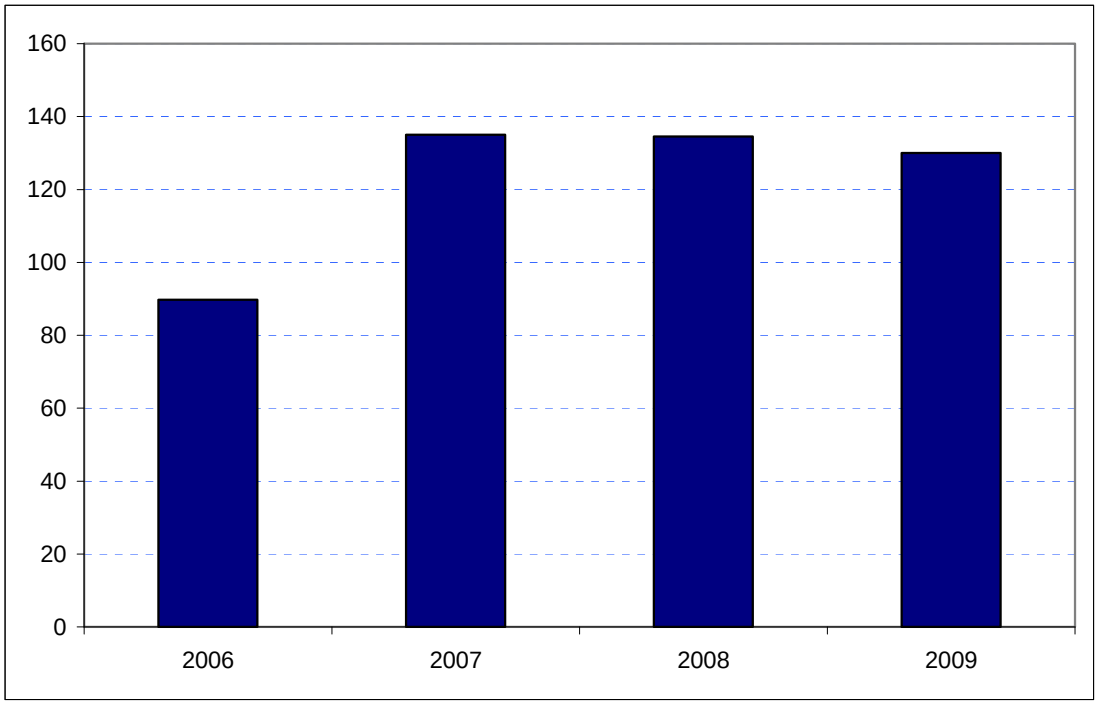
Figure 8.9: Ealing's estimated share of total London tourism expenditure (%)

Sources: IPS, UKTS, BRES, LDA surveys and GLA Economics calculations

Enfield
Borough Rank: 22

Estimates in Figure 5.10 show a slight net fall in Enfield's overseas visitor spend since 2007. Expenditure was broadly constant between 2007 and 2008 at £135 million before dropping to £130 million in 2009. These three years of data estimates are some margin above that for 2006.

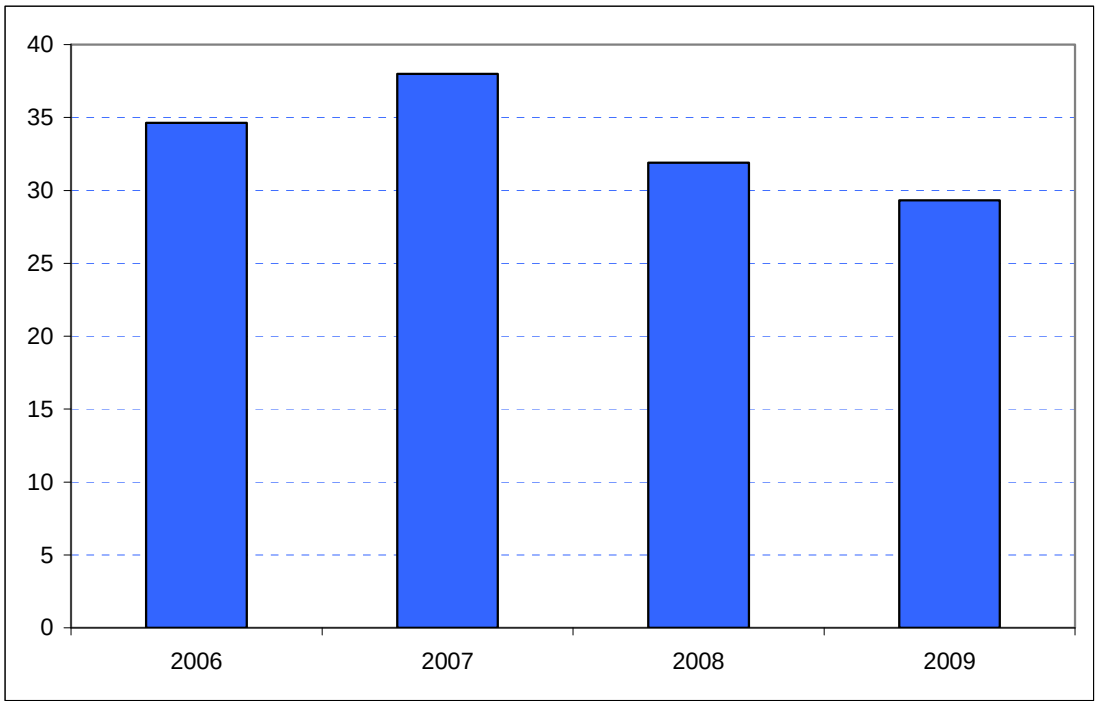
Figure 5.10: Overseas tourism expenditure in Enfield (£ millions)



Sources: IPS, BRES, LDA surveys and GLA Economics calculations

Figure 6.10 contains estimates by domestic overnight visitors in Enfield. These show falling domestic overnight spend in the Borough since 2007. In 2007 spend was estimated to be £38 million. This is estimated to have dropped to £32 million in 2008 and then to £29 million in 2009.

Figure 6.10: Domestic staying tourism expenditure in Enfield (£ millions)



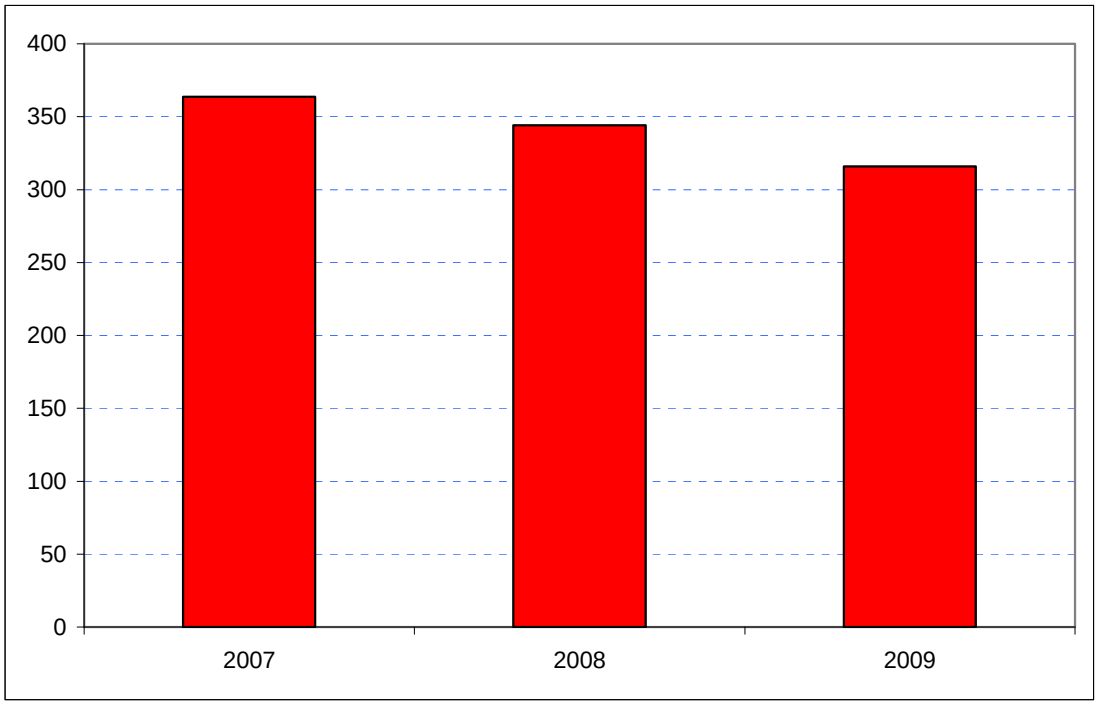
Sources: UKTS, BRES, LDA surveys and GLA Economics calculations

An experimental estimate of day visitor spend is provided in Tables 2a and 2b of Chapter 2. It should be emphasised that these are modelled estimates and further details of the data issues presented by day visitor tourism can be found in GLA Economics' Current Issues Note 29[16]. Details of the modelling and changes to it from previous LATI estimates can be found in the methodology section.

When the experimental day visitor estimates are included, total estimated tourist expenditure fell between 2007 and 2009 as shown in Figure 7.10. Receipts in 2007 had been £365 million, falling to £344 million in 2008 and £316 million in 2009. Data for 2006 were excluded from the graphic as they would have introduced the additional problem of a change of survey basis for the day visitor estimates prior to 2007.

[16] http://www.london.gov.uk/publication/estimating-contribution-leisure-day-visitors-londons-tourism-industry
GLA Economics - Estimating the contribution of leisure day visitors to London's tourism industry (March 2011)

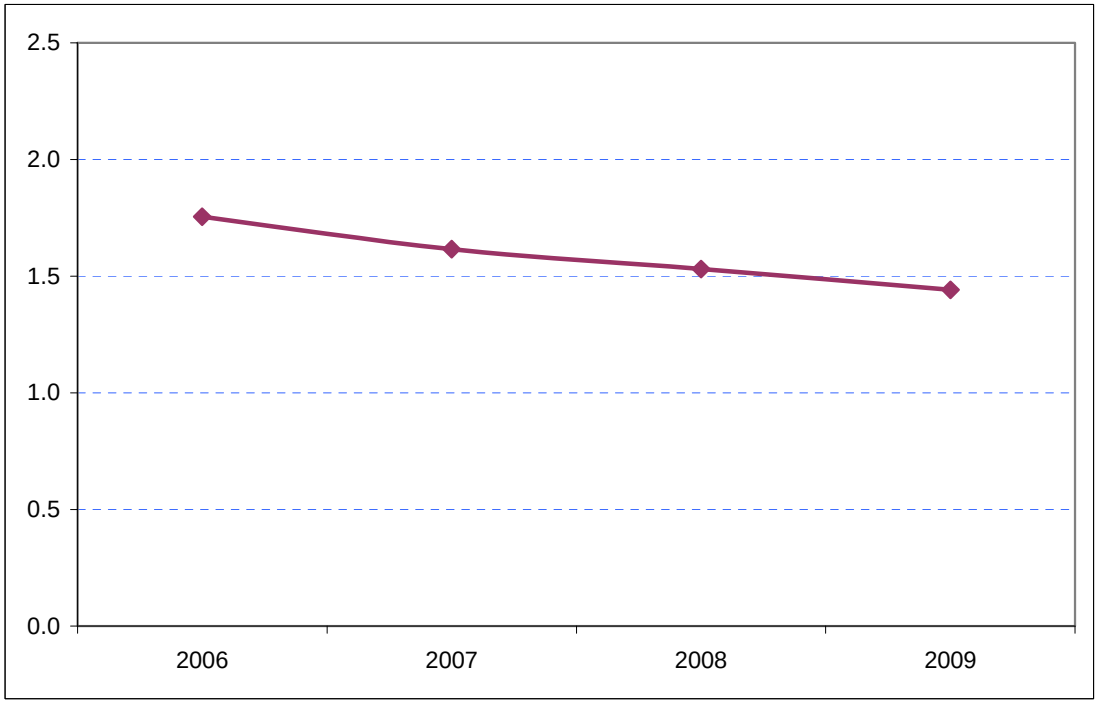
Figure 7.10: Estimates of total tourism expenditure in Enfield including experimental estimates of day visitor spend (£ millions)



Sources: IPS, UKTS, BRES, LDA surveys and GLA Economics calculations

Figure 8.10 shows that Enfield's share of total London tourism expenditure has fallen from 1.8 per cent in 2006 to 1.4 per cent in 2009.

Figure 8.10: Enfield's estimated share of total London tourism expenditure (%)

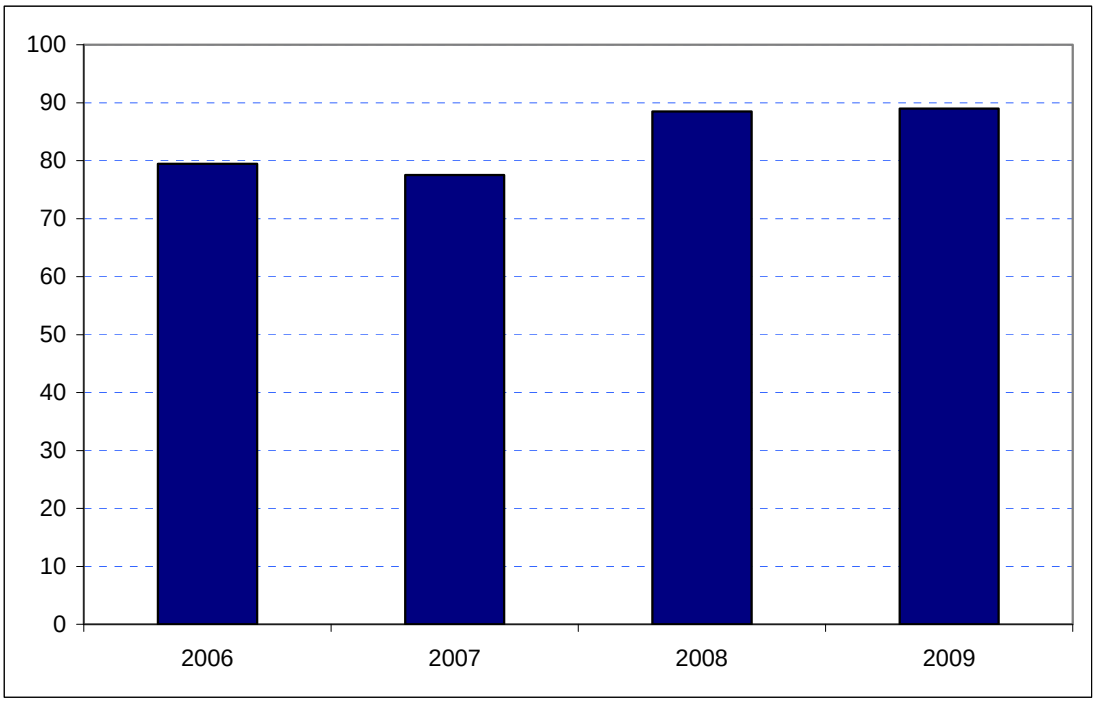


Sources: IPS, UKTS, BRES, LDA surveys and GLA Economics calculations

Greenwich
Borough Rank: 23

Greenwich has a tendency to perform below expectations in the modelling as, whilst it may get plenty of visitors, it is relatively under-represented in terms of bed space which can drive the results via the accommodation spend element in the model. Nevertheless, estimates in Figure 5.11 show a significant increase in Greenwich's overseas visitor spend between 2007 and 2008. In 2007, expenditure was estimated at £78 million. For the two subsequent years it is estimated at £88 million and £89 million respectively.

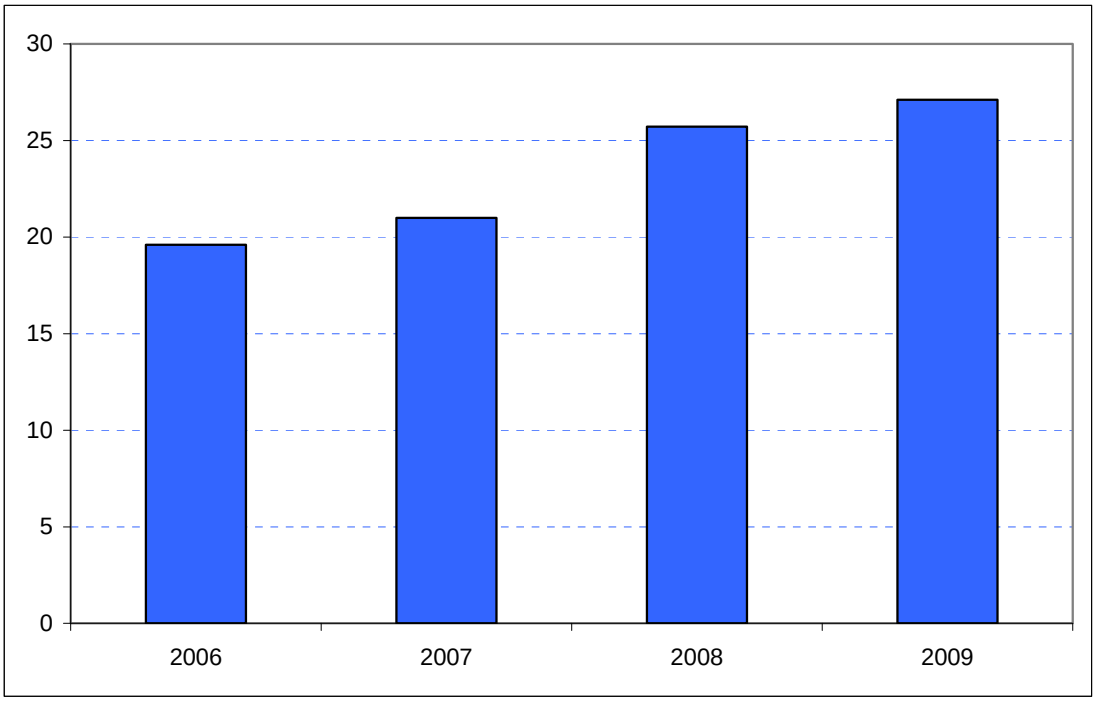
Figure 5.11: Overseas tourism expenditure in Greenwich (£ millions)



Sources: IPS, BRES, LDA surveys and GLA Economics calculations

Figure 6.11 contains estimates by domestic overnight visitors in Greenwich. These also show a significant uplift in expenditure between 2007 and 2008. In 2007 spend amounted to over £20 million, up on 2006. Comparable figures for 2008 and 2009 are £26 million and £27 million respectively.

Figure 6.11: Domestic staying tourism expenditure in Greenwich (£ millions)



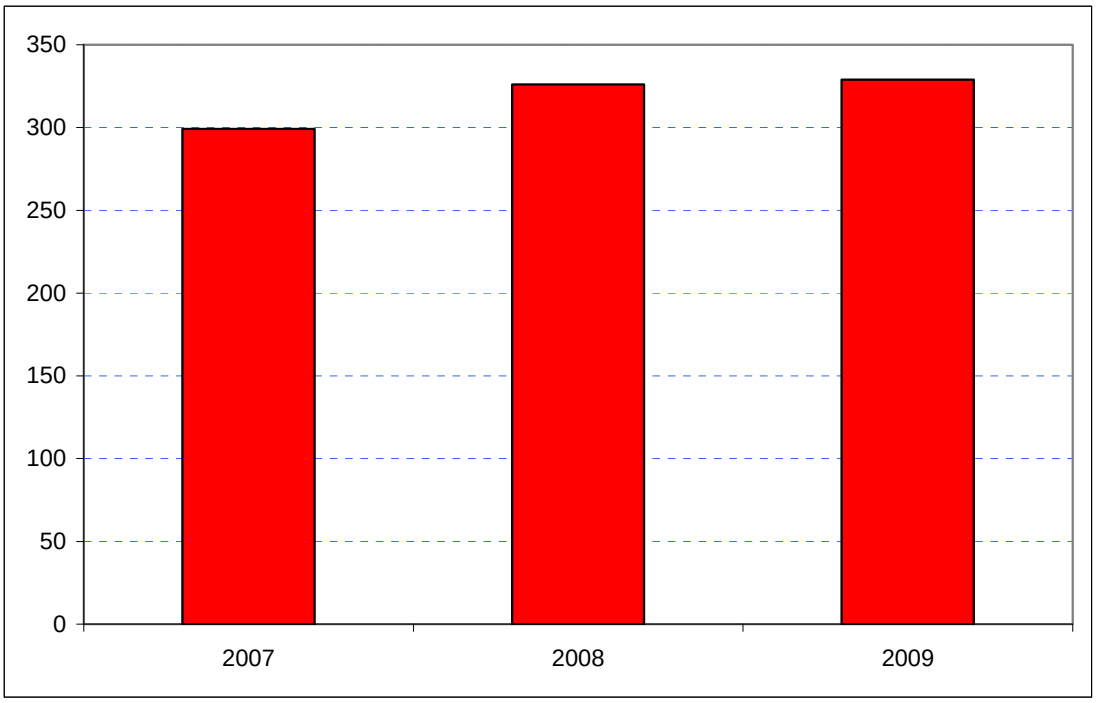
Sources: UKTS, BRES, LDA surveys and GLA Economics calculations

An experimental estimate of day visitor spend is provided in Tables 2a and 2b of Chapter 2. It should be emphasised that these are modelled estimates and further details of the data issues presented by day visitor tourism can be found in GLA Economics' Current Issues Note 29[17]. Details of the modelling and changes to it from previous LATI estimates can be found in the methodology section.

When the experimental day visitor estimates are included, total estimated tourist expenditure showed a net increase between 2007 and 2009. Receipts in 2007 totalled £300 million but this rose sharply in 2008 to £326 million and then more marginally in 2009 to £329 million as shown in Figure 7.11. Data for 2006 were excluded from the graphic as they would have introduced the additional problem of a change of survey basis for the day visitor estimates prior to 2007.

[17] http://www.london.gov.uk/publication/estimating-contribution-leisure-day-visitors-londons-tourism-industry
GLA Economics - Estimating the contribution of leisure day visitors to London's tourism industry (March 2011)

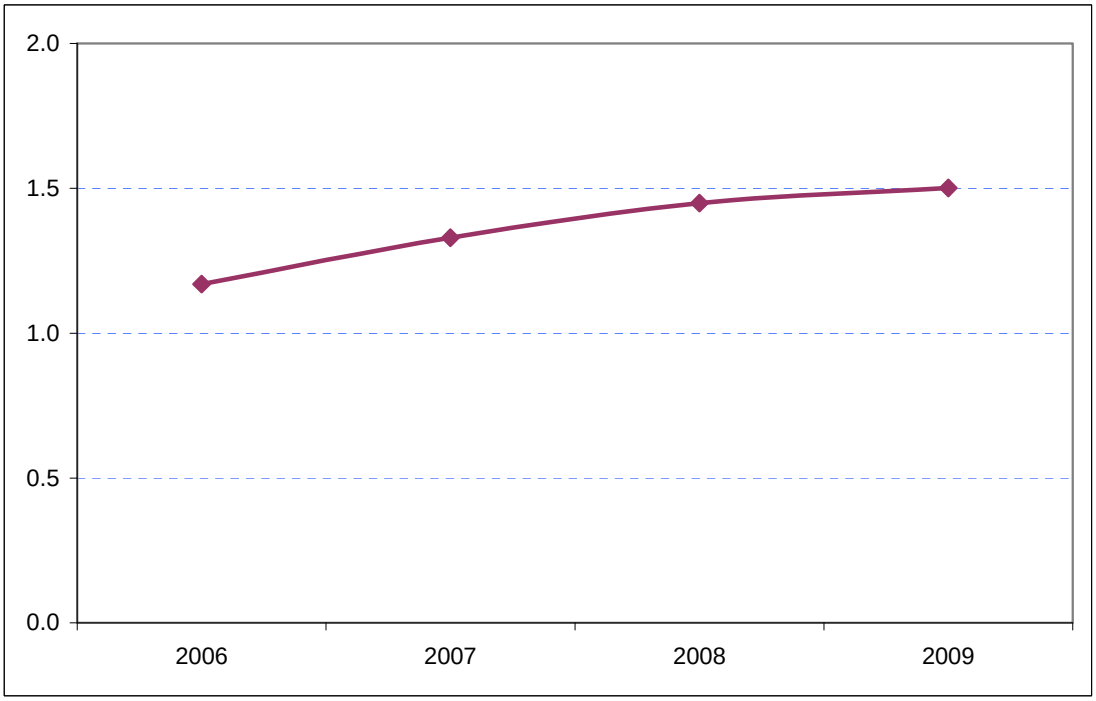
Figure 7.11: Estimates of total tourism expenditure in Greenwich including experimental estimates of day visitor spend (£ millions)



Sources: IPS, UKTS, BRES, LDA surveys and GLA Economics calculations

Figure 8.11 shows that Greenwich's share of total London tourism expenditure has increased from 1.2 per cent in 2006 to 1.5 per cent in 2009.

Figure 8.11: Greenwich's estimated share of total London tourism expenditure (%)

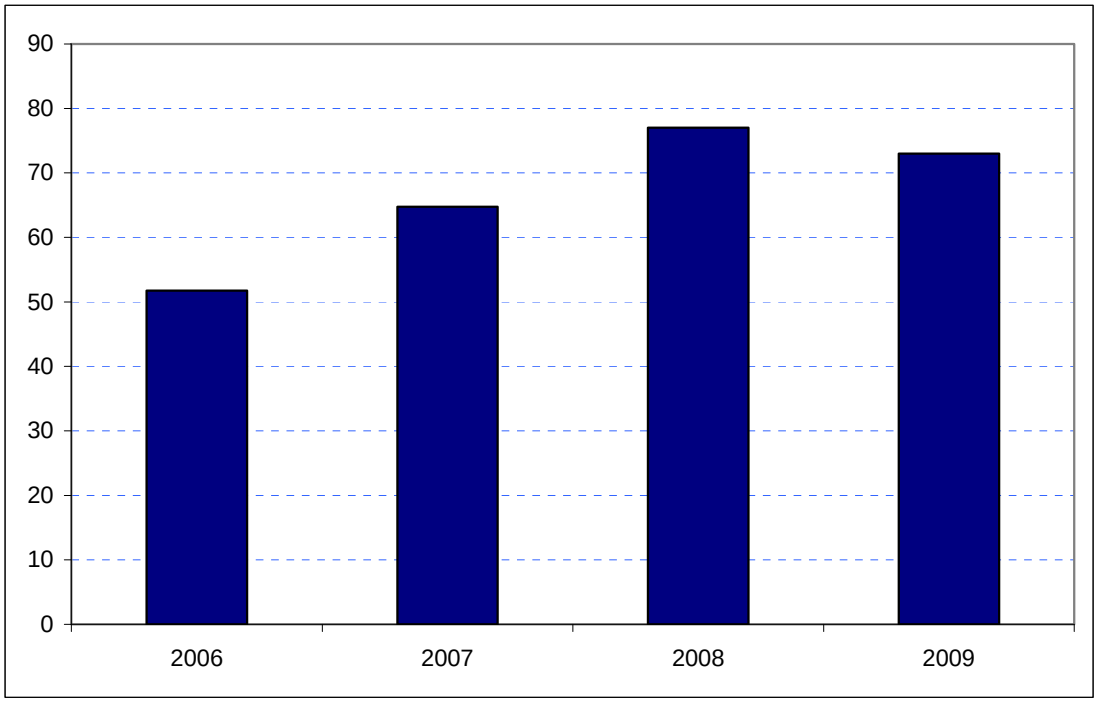


Sources: IPS, UKTS, BRES, LDA surveys and GLA Economics calculations

Hackney
Borough Rank: 29

Estimates in Figure 5.12 show a net gain in Hackney's overseas visitor spend since 2006 and 2007. In 2007 the Borough received £65 million from its international visitors. Spend increased rapidly between 2006 and 2008 from £52 million to £77 million. However, results show a fall back to £73 million in 2009.

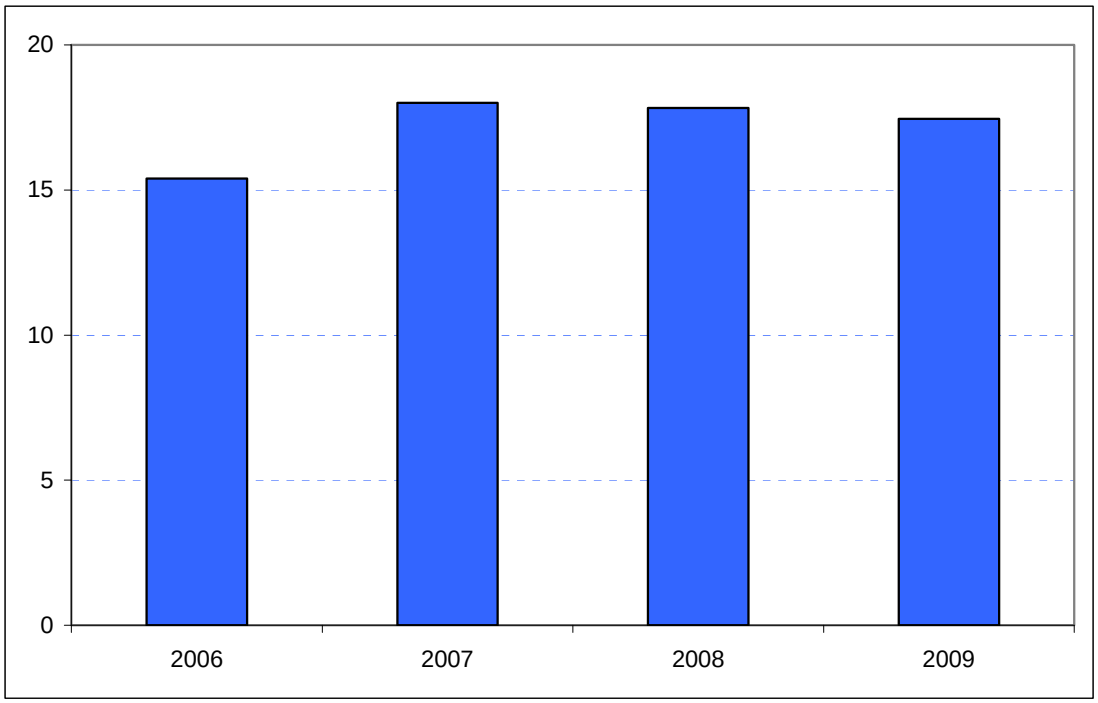
Figure 5.12: Overseas tourism expenditure in Hackney (£ millions)



Sources: IPS, BRES, LDA surveys and GLA Economics calculations

Figure 6.12 contains estimates by domestic overnight visitors in Hackney. These show a greater degree of consistency and a slight overall net gain in domestic overnight spend in the Borough since 2007. In 2007 spend was estimated to be £18 million. This is estimated to have been broadly the same in 2008 and then fallen back slightly to £17 million in 2009. The overall picture is one of stability.

Figure 6.12: Domestic staying tourism expenditure in Hackney (£ millions)



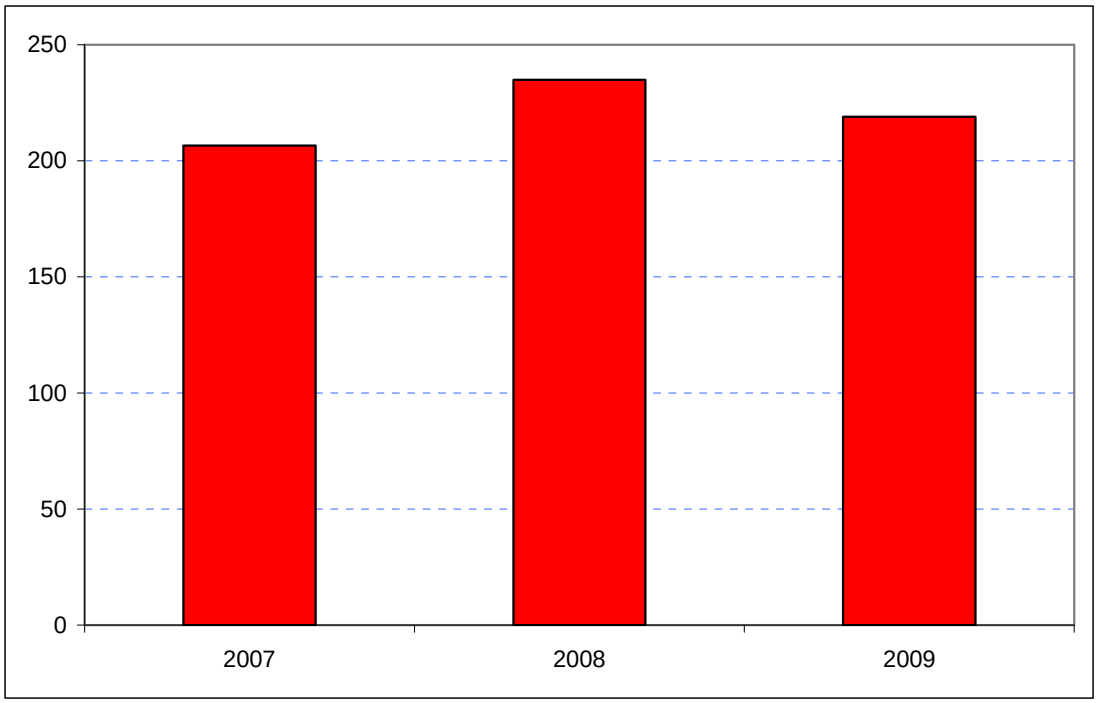
Sources: UKTS, BRES, LDA surveys and GLA Economics calculations

An experimental estimate of day visitor spend is provided in Tables 2a and 2b of Chapter 2. It should be emphasised that these are modelled estimates and further details of the data issues presented by day visitor tourism can be found in GLA Economics' Current Issues Note 29[18]. Details of the modelling and changes to it from previous LATI estimates can be found in the methodology section.

When the experimental day visitor estimates are included, total estimated tourist expenditure exhibited an overall net rise between 2007 and 2009 as shown in Figure 7.12. Receipts in 2007 had been £208 million, increasing to £235 million in 2008 before slipping back to £219 million in 2009. Data for 2006 were excluded from the graphic as they would have introduced the additional problem of a change of survey basis for the day visitor estimates prior to 2007.

[18] http://www.london.gov.uk/publication/estimating-contribution-leisure-day-visitors-londons-tourism-industry
GLA Economics - Estimating the contribution of leisure day visitors to London's tourism industry (March 2011)

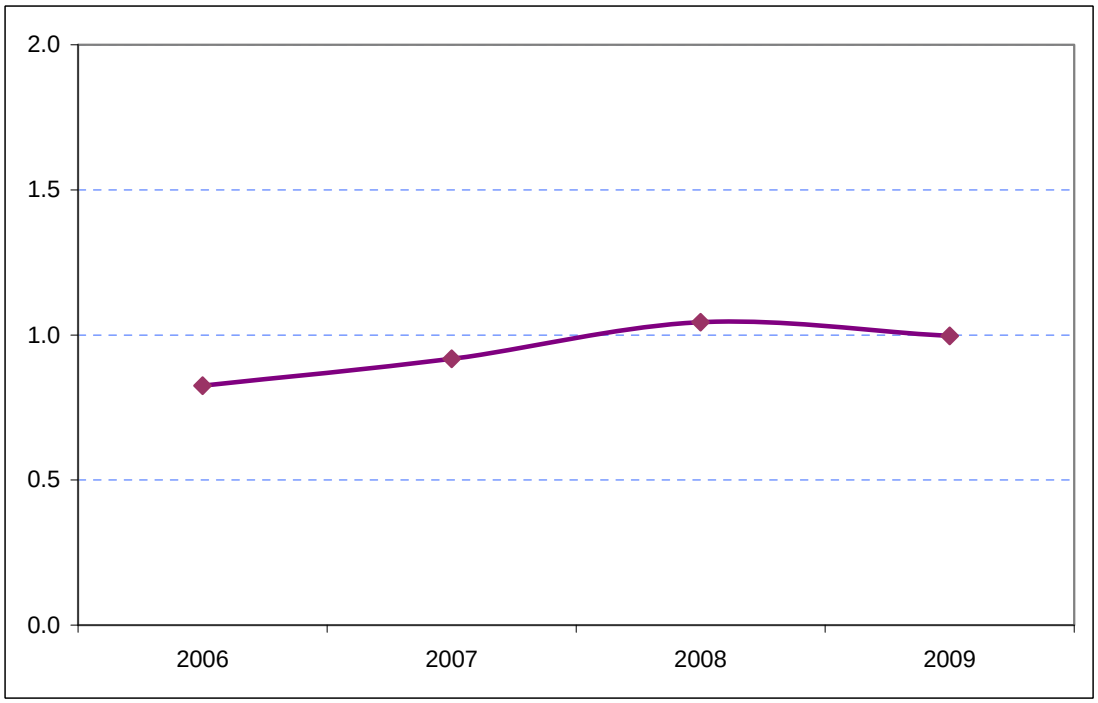
Figure 7.12: Estimates of total tourism expenditure in Hackney including experimental estimates of day visitor spend (£ millions)



Sources: IPS, UKTS, BRES, LDA surveys and GLA Economics calculations

Figure 8.12 shows that Hackney's share of total London tourism expenditure has risen from 0.8 per cent in 2006 to 1.0 per cent in 2008 and 2009.

Figure 8.12: Hackney's estimated share of total London tourism expenditure (%)

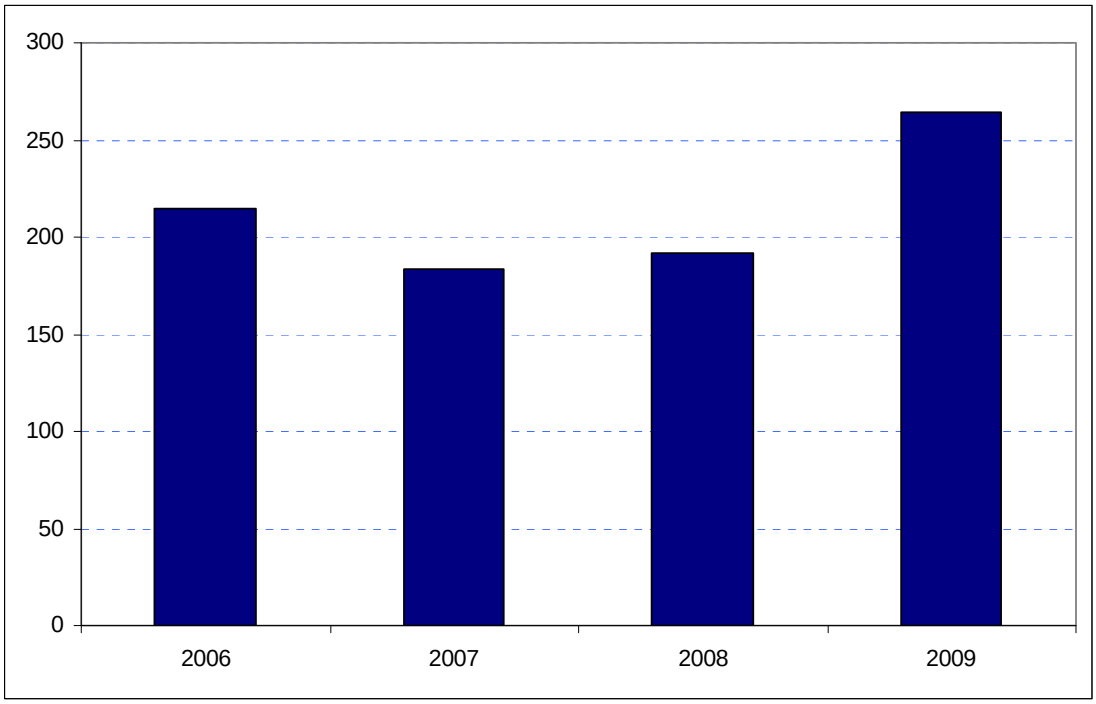


Sources: IPS, UKTS, BRES, LDA surveys and GLA Economics calculations

Hammersmith and Fulham
Borough Rank: 8

Estimates in Figure 5.13 show a marked increase in Hammersmith & Fulham's overseas visitor spend between 2007 and 2009. In 2007, expenditure was estimated at £183 million. For the two subsequent years it is estimated at £192 million and £264 million respectively. That implies a nearly 45% per cent increase in spend since 2007. As with the other increases in the Borough's results, it is believed that much of this may have been driven by the opening of the Westfield Centre at Shepherd's Bush.

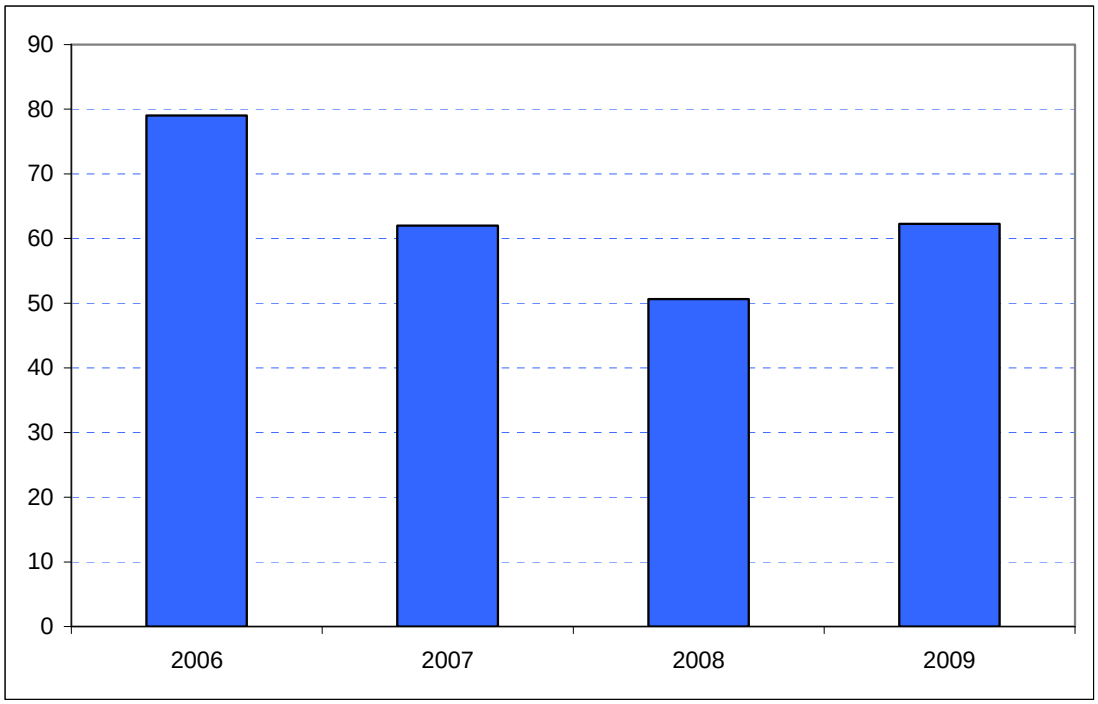
Figure 5.13: Overseas tourism expenditure in Hammersmith & Fulham (£ millions)



Sources: IPS, BRES, LDA surveys and GLA Economics calculations

Figure 6.13 presents estimates by domestic overnight visitors in Hammersmith & Fulham. These show spending in decline up until 2008. In 2006 spend was estimated to have been £79 million and by 2008 this had fallen to £51 million. However, for 2009 the estimate is back up to £62 million – essentially the same level as at the time of the last report. The increase in 2009 reverses a negative trend evident in recent years.

Figure 6.13: Domestic staying tourism expenditure in Hammersmith & Fulham (£ millions)



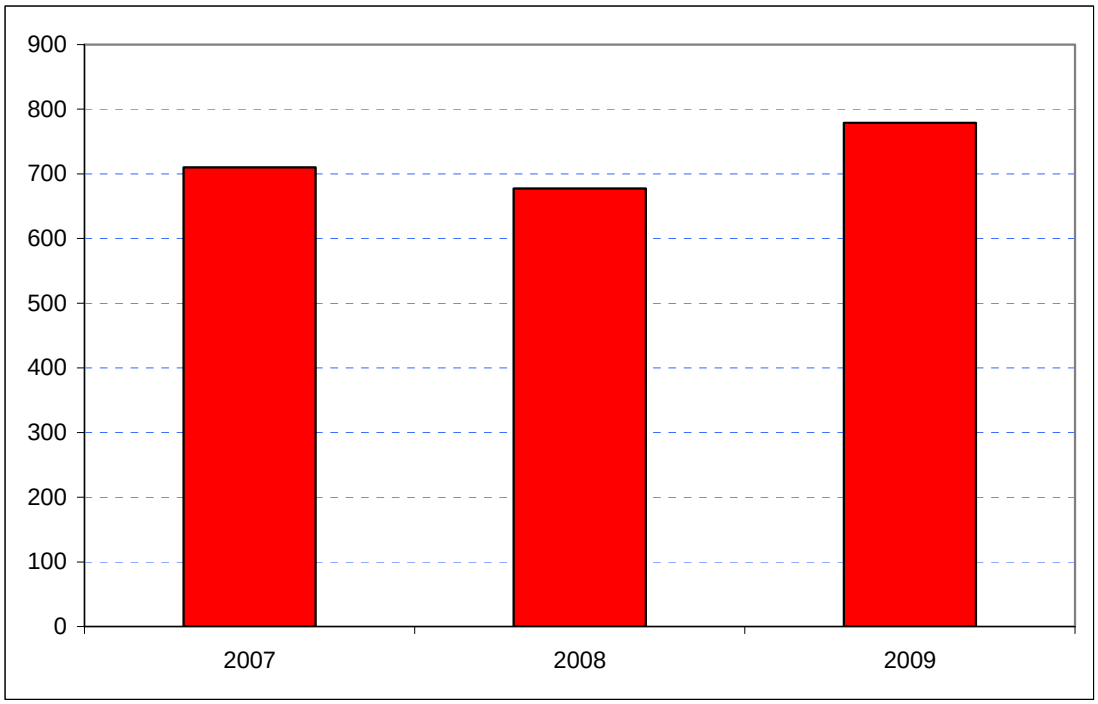
Sources: UKTS, BRES, LDA surveys and GLA Economics calculations

An experimental estimate of day visitor spend is provided in Tables 2a and 2b of Chapter 2. It should be emphasised that these are modelled estimates and further details of the data issues presented by day visitor tourism can be found in GLA Economics' Current Issues Note 29[19]. Details of the modelling and changes to it from previous LATI estimates can be found in the methodology section.

When the experimental day visitor estimates are included, total estimated tourist expenditure showed a strong net increase between 2007 and 2009 in spite of the decline between 2007 and 2008. Receipts in 2007 totalled £710 million but this fell in 2008 to £677 million before the marked increased in 2009 to £779 million as shown in Figure 7.13. Data for 2006 were excluded from the graphic as they would have introduced the additional problem of a change of survey basis for the day visitor estimates prior to 2007.

[19] http://www.london.gov.uk/publication/estimating-contribution-leisure-day-visitors-londons-tourism-industry
GLA Economics - Estimating the contribution of leisure day visitors to London's tourism industry (March 2011)

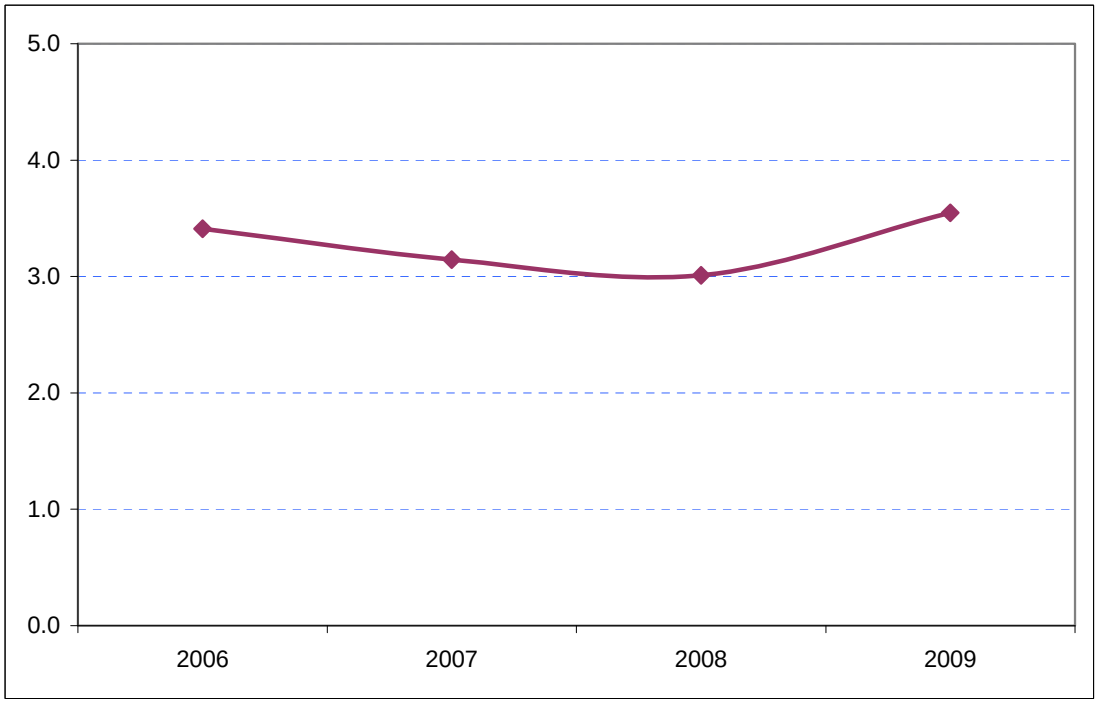
Figure 7.13: Estimates of total tourism expenditure in Hammersmith & Fulham including experimental estimates of day visitor spend (£ millions)



Sources: IPS, UKTS, BRES, LDA surveys and GLA Economics calculations

Figure 8.13 shows that Hammersmith & Fulham's share of total London tourism expenditure has increased from 3.1 per cent in 2007 to 3.5 per cent in 2009 although the share only just exceeds that of 2006.

Figure 8.13: Hammersmith & Fulham's estimated share of total London tourism expenditure (%)

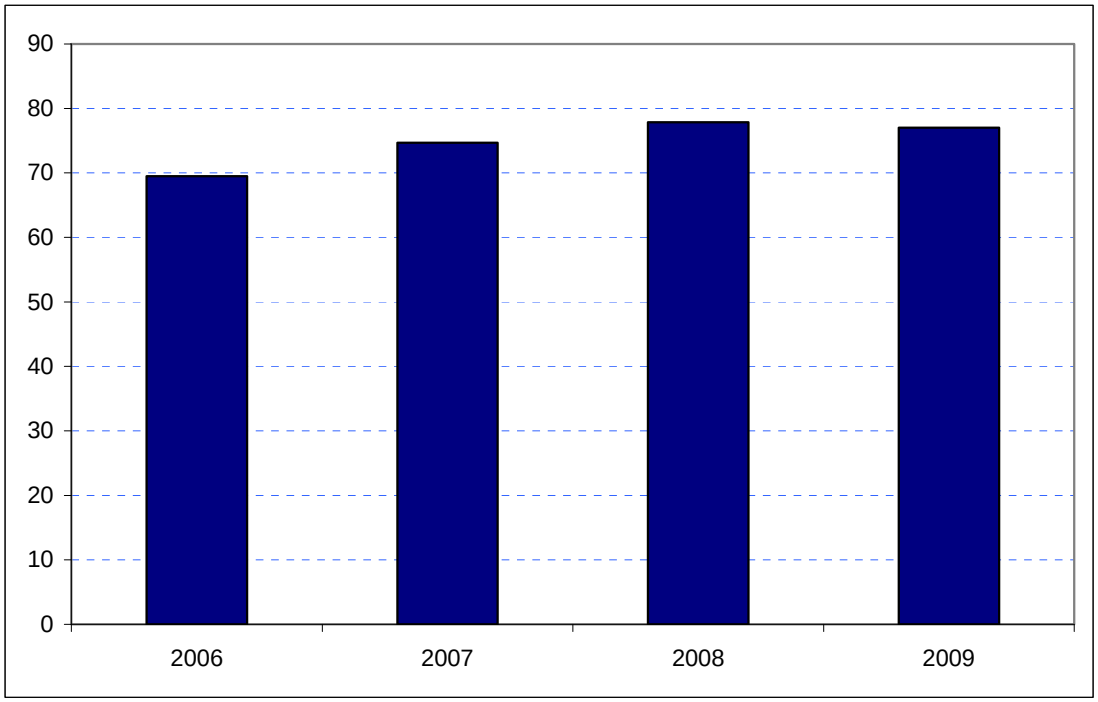


Sources: IPS, UKTS, BRES, LDA surveys and GLA Economics calculations

Haringey
Borough Rank: 25

Estimates in Figure 5.14 show a net gain in Haringey's overseas visitor spend since 2006 and 2007. Spend increased between 2006 and 2008 from £69 million in 2006 to £75 million in 2007 and to £78 million in 2008. However, results show a slight fall back to £77 million in 2009. The overall picture is one of general stability.

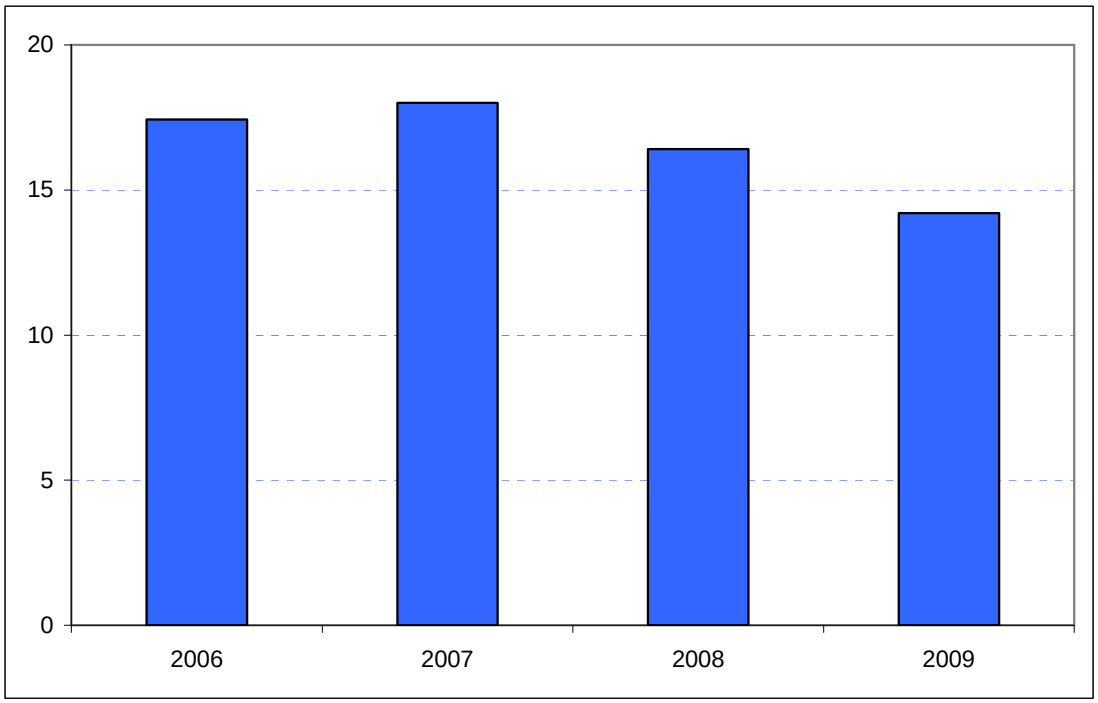
Figure 5.14: Overseas tourism expenditure in Haringey (£ millions)



Sources: IPS, BRES, LDA surveys and GLA Economics calculations

Figure 6.14 presents estimates for domestic overnight visitors in Haringey. These show a consistent fall in spend in the Borough since 2006. In 2006 spend was estimated to be £17 million. In spite of a small rise in 2007, this is estimated to have dropped to £16 million in 2008 and then fallen back further to £14 million in 2009.

Figure 6.14: Domestic staying tourism expenditure in Haringey (£ millions)



Sources: UKTS, BRES, LDA surveys and GLA Economics calculations

An experimental estimate of day visitor spend is provided in Tables 2a and 2b of Chapter 2. It should be emphasised that these are modelled estimates and further details of the data issues presented by day visitor tourism can be found in GLA Economics' Current Issues Note 29[20]. Details of the modelling and changes to it from previous LATI estimates can be found in the methodology section.

When the experimental day visitor estimates are included, total estimated tourist expenditure exhibited a relatively small net rise between 2007 and 2009 as shown in Figure 7.14. Receipts in 2007 had been £250 million, increasing to £275 million in 2008 before slipping back to £253 million in 2009. Data for 2006 were excluded from the graphic as they would have introduced the additional problem of a change of survey basis for the day visitor estimates prior to 2007.

[20] http://www.london.gov.uk/publication/estimating-contribution-leisure-day-visitors-londons-tourism-industry
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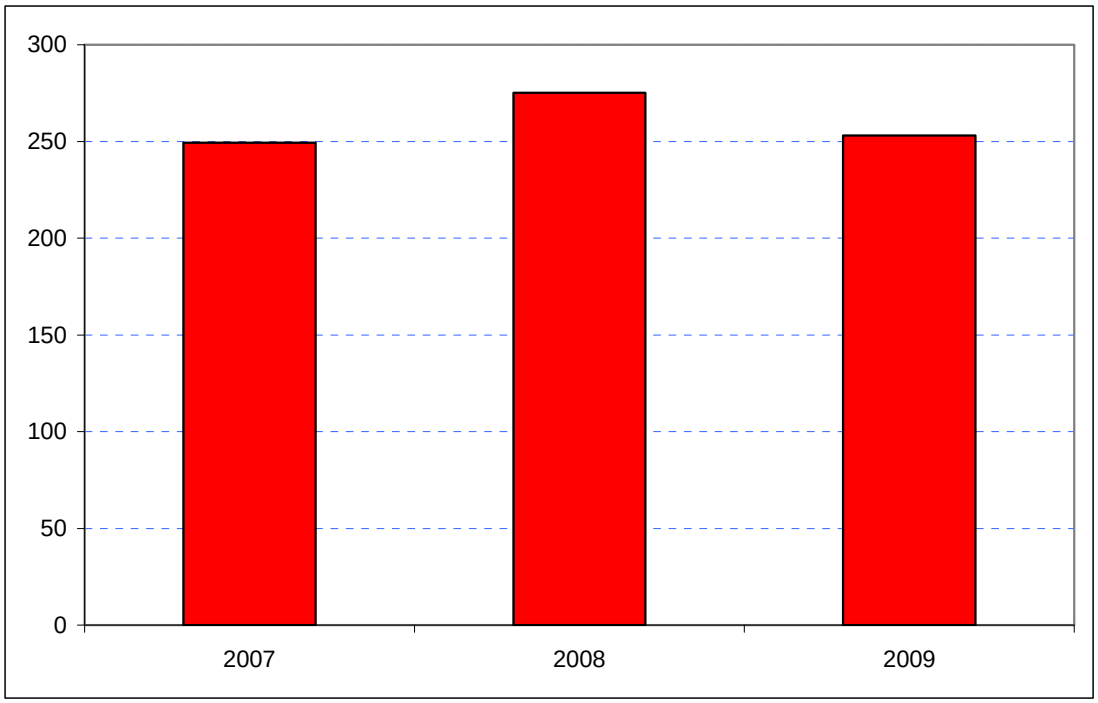
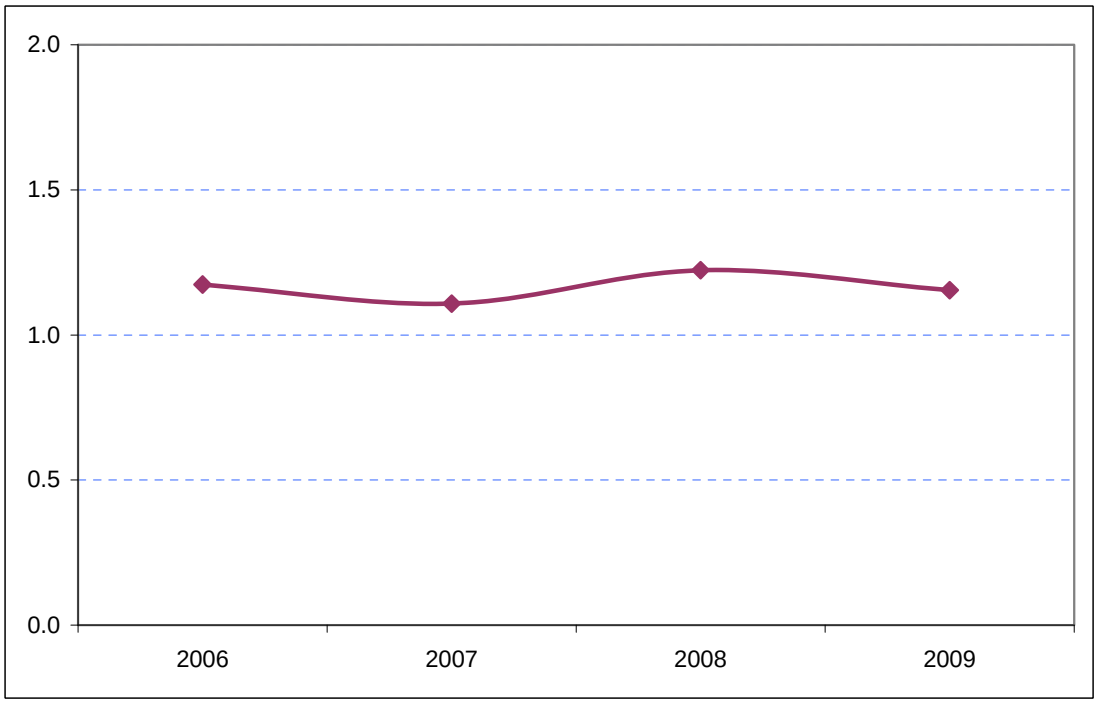
Figure 7.14: Estimates of total tourism expenditure in Haringey including experimental estimates of day visitor spend (£ millions)



Sources: IPS, UKTS, BRES, LDA surveys and GLA Economics calculations

Figure 8.14 shows that Haringey's share of total London tourism expenditure has been broadly consistent since 2006 at either 1.1 per cent or 1.2 per cent of the London total.

Figure 8.14: Haringey's estimated share of total London tourism expenditure (%)

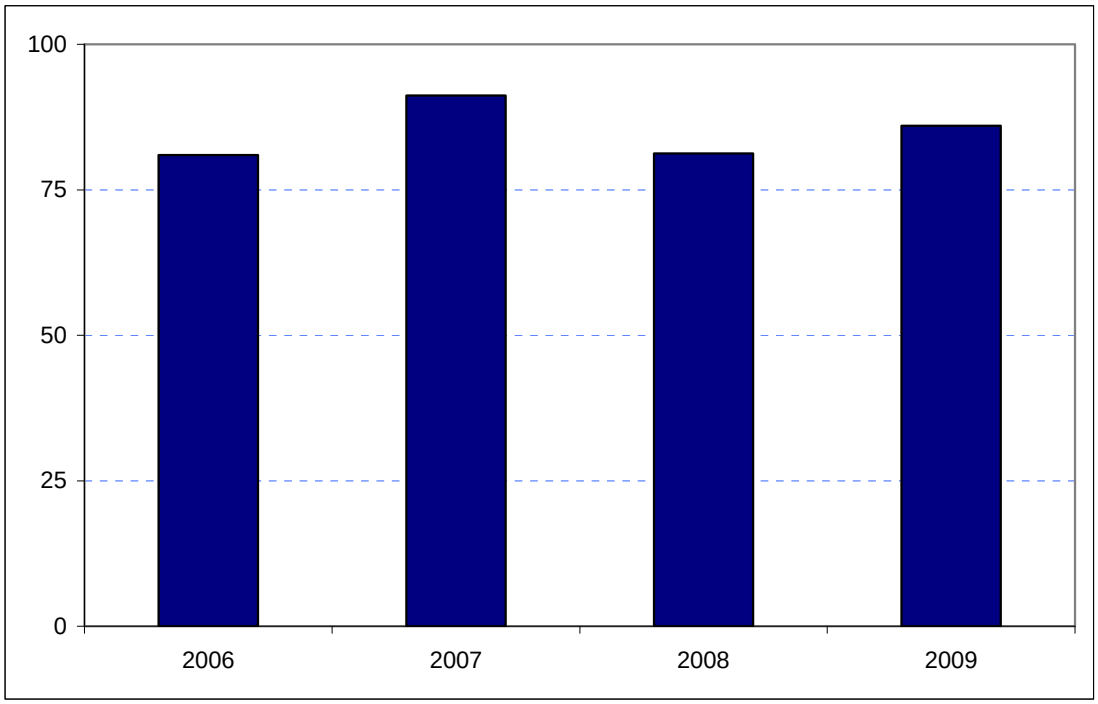


Sources: IPS, UKTS, BRES, LDA surveys and GLA Economics calculations

Harrow
Borough Rank: 28

Estimates in Figure 5.15 show a net gain in Harrow's overseas visitor spend since 2006 but a decline when compared with 2007. Spend fell back from £91 million to £81 million in 2008 but has since recovered to £86 million.

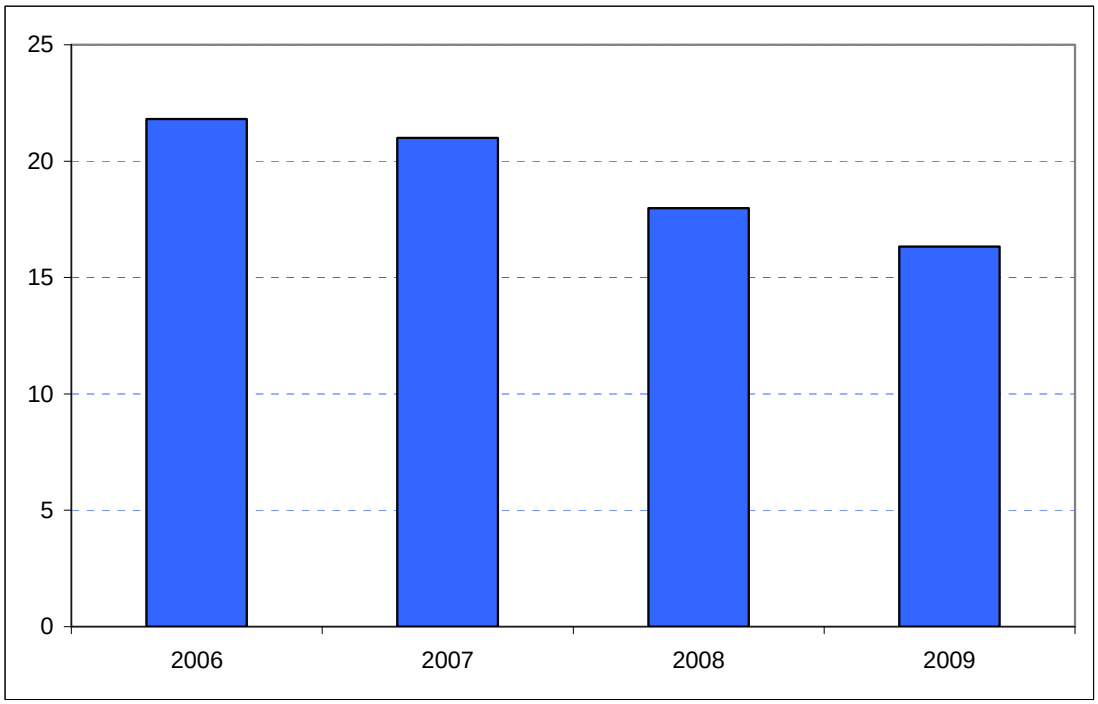
Figure 5.15: Overseas tourism expenditure in Harrow (£ millions)



Sources: IPS, BRES, LDA surveys and GLA Economics calculations

Figure 6.15 presents estimates for domestic overnight visitors in Harrow. These show a consistent fall in spend in the Borough since 2006. In 2006 spend was estimated to be £22 million in 2006 and £21 million in 2007. This is estimated to have dropped to £18 million in 2008 and then to £16 million in 2009.

Figure 6.15: Domestic staying tourism expenditure in Harrow (£ millions)



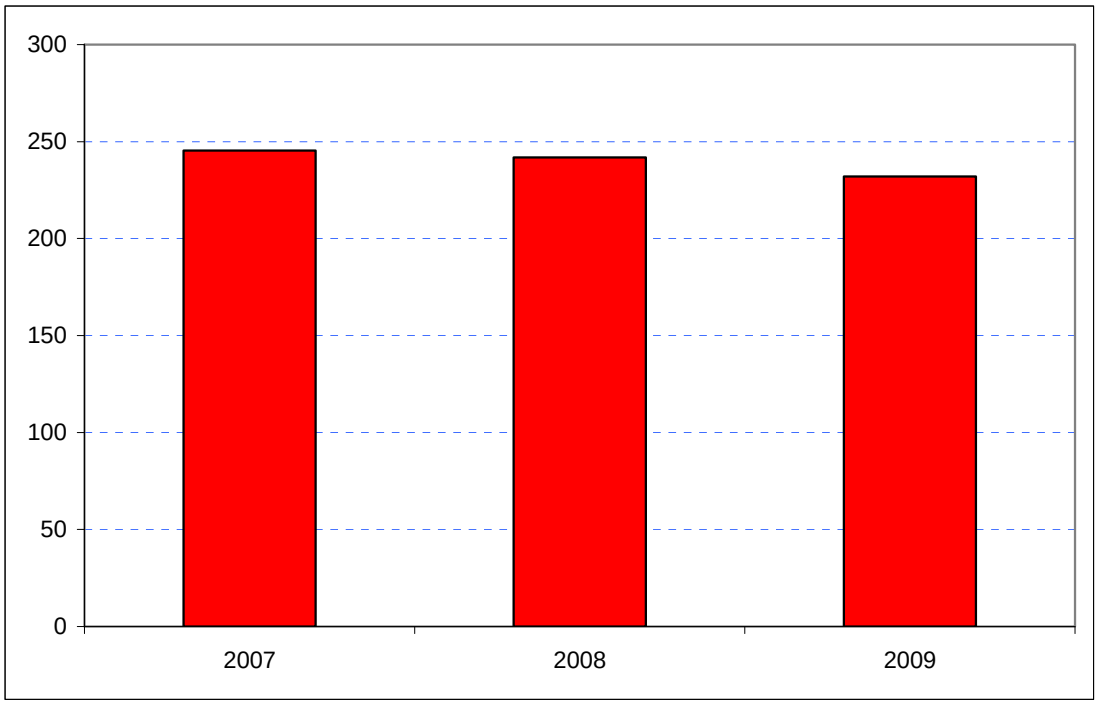
Sources: UKTS, BRES, LDA surveys and GLA Economics calculations

An experimental estimate of day visitor spend is provided in Tables 2a and 2b of Chapter 2. It should be emphasised that these are modelled estimates and further details of the data issues presented by day visitor tourism can be found in GLA Economics' Current Issues Note 29[21]. Details of the modelling and changes to it from previous LATI estimates can be found in the methodology section.

When the experimental day visitor estimates are included, total estimated tourist expenditure exhibited a fall between 2007 and 2009 as shown in Figure 7.15. Receipts in 2007 had been £246 million, decreasing slightly to £242 million in 2008 before slipping back to £232 million in 2009. Data for 2006 were excluded from the graphic as they would have introduced the additional problem of a change of survey basis for the day visitor estimates prior to 2007.

[21] http://www.london.gov.uk/publication/estimating-contribution-leisure-day-visitors-londons-tourism-industry
GLA Economics - Estimating the contribution of leisure day visitors to London's tourism industry (March 2011)

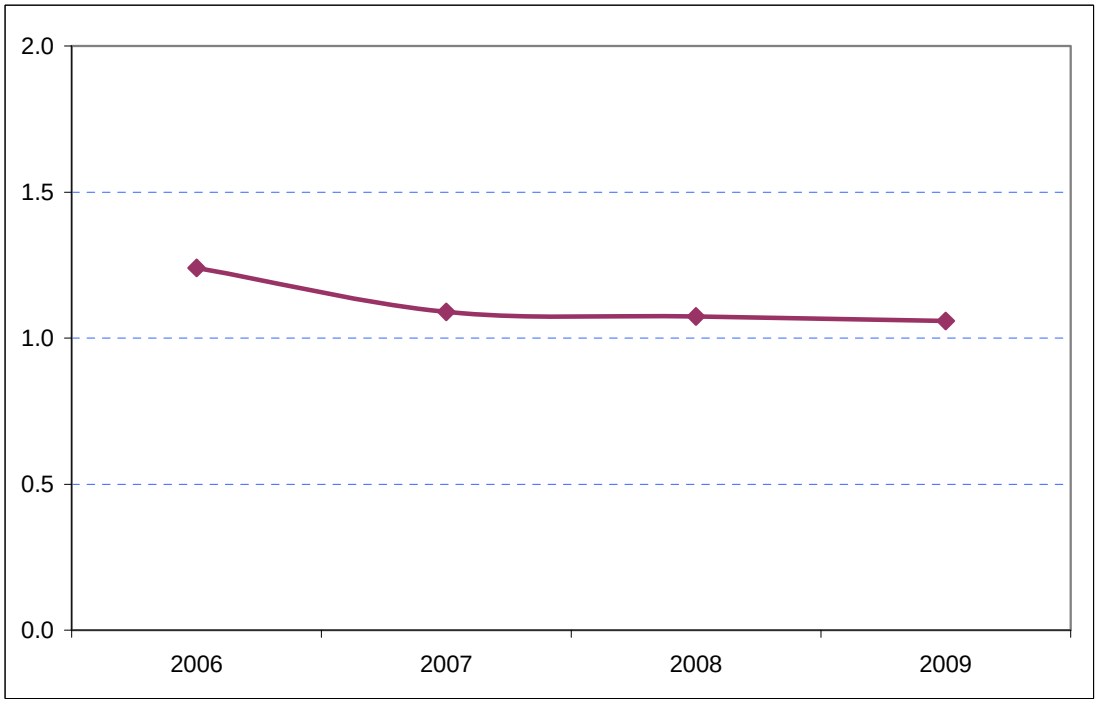
Figure 7.15: Estimates of total tourism expenditure in Harrow including experimental estimates of day visitor spend (£ millions)



Sources: IPS, UKTS, BRES, LDA surveys and GLA Economics calculations

Figure 8.15 shows that Harrow's share of total London tourism expenditure has fallen marginally since 2006 from 1.2 per cent to under 1.1 per cent of the London total.

Figure 8.15: Harrow's estimated share of total London tourism expenditure (%)

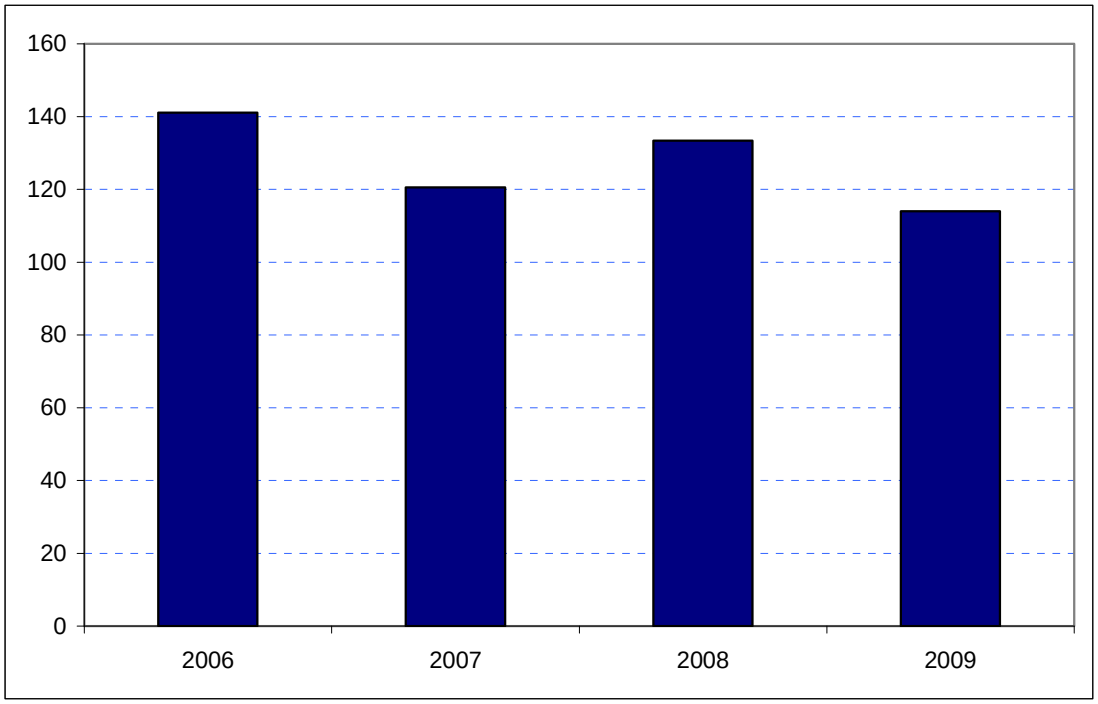


Sources: IPS, UKTS, BRES, LDA surveys and GLA Economics calculations

Havering
Borough Rank: 21

Estimates in Figure 5.16 show a net gain in Havering's overseas visitor spend since 2006 although the pattern between one year and the next has been rather erratic. Spend fell between 2006 and 2007 from £141 million to £121 million. It then increased to £133 million in 2008 before falling back to £114 million in 2009.

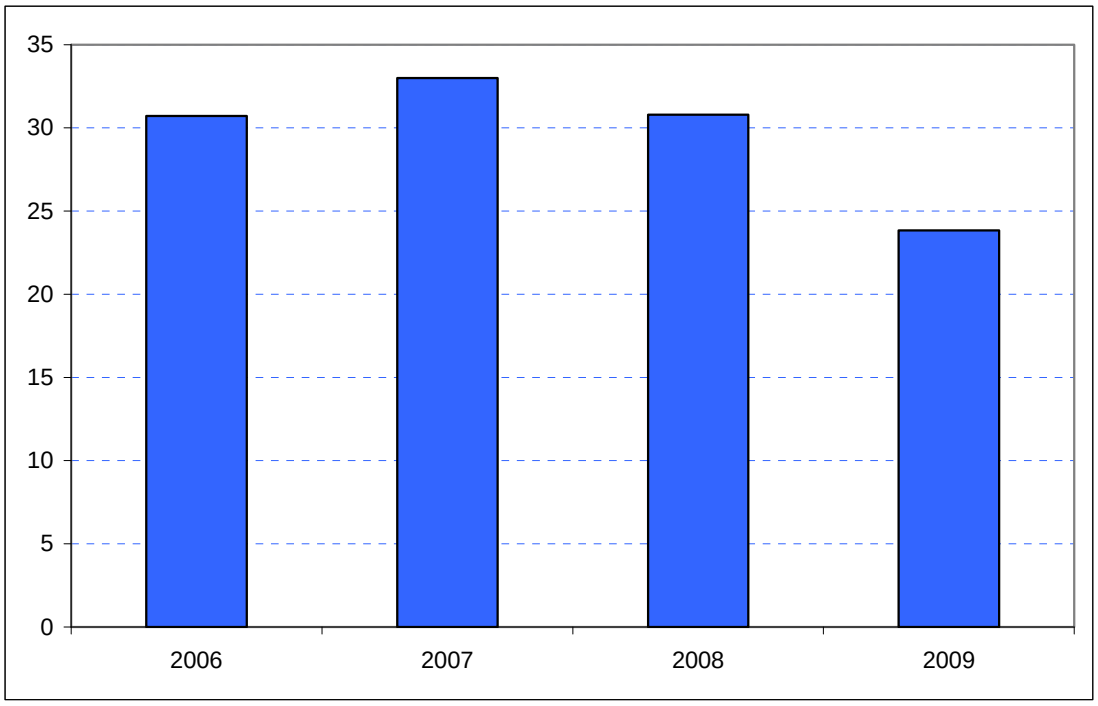
Figure 5.16: Overseas tourism expenditure in Havering (£ millions)



Sources: IPS, BRES, LDA surveys and GLA Economics calculations

Figure 6.16 presents estimates for domestic overnight visitors in Havering. These show a broad consistency in spend in the Borough between 2006 and 2008, varying only marginally around the £31 million mark with a slightly higher figure of £33 million in 2007. This is estimated to have dropped to £24 million in 2009.

Figure 6.16: Domestic staying tourism expenditure in Havering (£ millions)



Sources: UKTS, BRES, LDA surveys and GLA Economics calculations

An experimental estimate of day visitor spend is provided in Tables 2a and 2b of Chapter 2. It should be emphasised that these are modelled estimates and further details of the data issues presented by day visitor tourism can be found in GLA Economics' Current Issues Note 29[22]. Details of the modelling and changes to it from previous LATI estimates can be found in the methodology section.

When the experimental day visitor estimates are included, total estimated tourist expenditure exhibited a relatively small net rise between 2007 and 2009 as shown in Figure 7.16. Receipts in 2007 had been £358 million, decreasing to £345 million in 2008 before slipping back more steeply to £317 million in 2009. Data for 2006 were excluded from the graphic as they would have introduced the additional problem of a change of survey basis for the day visitor estimates prior to 2007.

[22] http://www.london.gov.uk/publication/estimating-contribution-leisure-day-visitors-londons-tourism-industry
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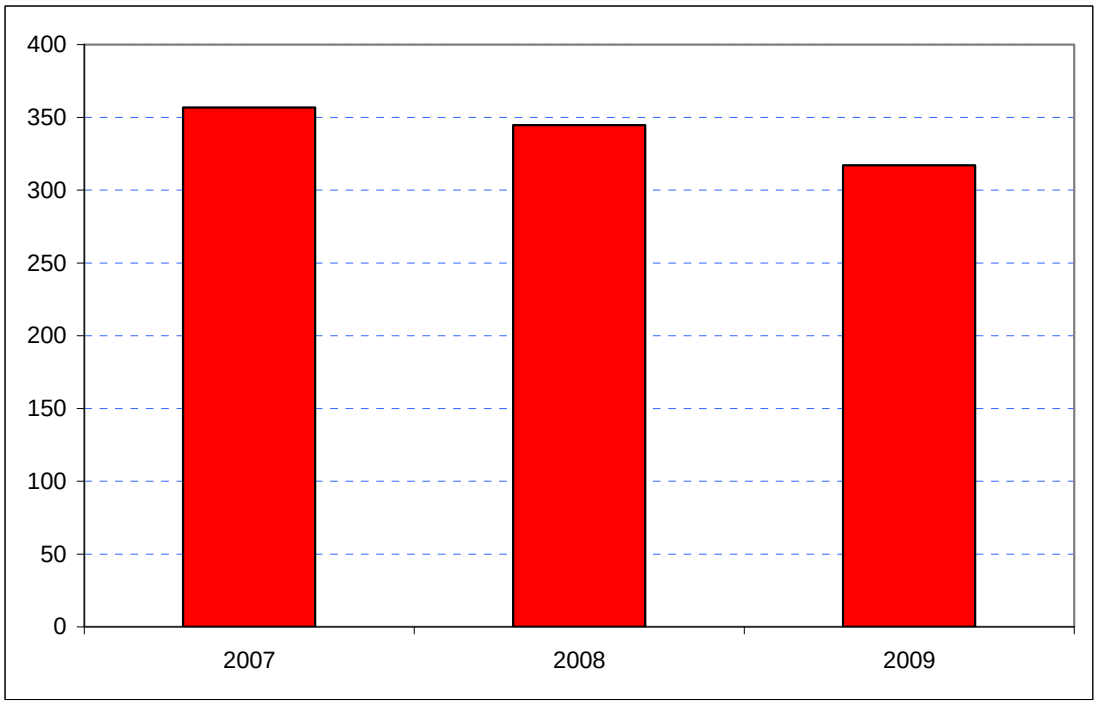
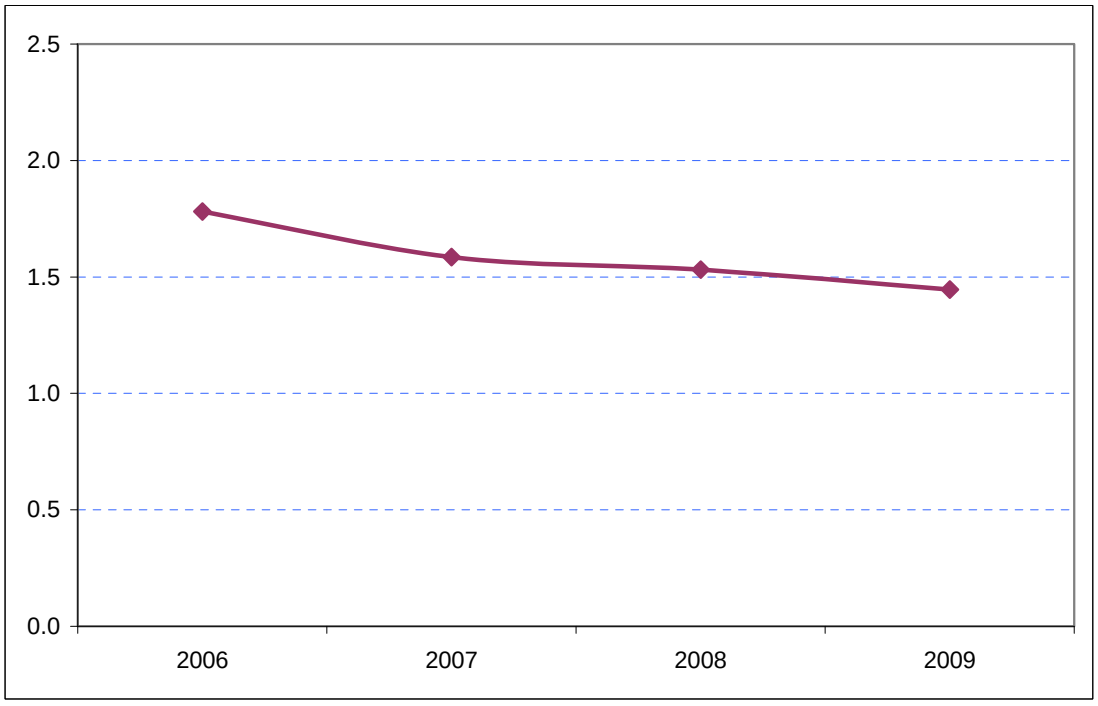
Figure 7.16: Estimates of total tourism expenditure in Havering including experimental estimates of day visitor spend (£ millions)



Sources: IPS, UKTS, BRES, LDA surveys and GLA Economics calculations

Figure 8.16 shows that Havering's share of total London tourism expenditure has fallen from 1.8 per cent in 2006 to under 1.5 per cent in 2009.

Figure 8.16: Havering's estimated share of total London tourism expenditure (%)

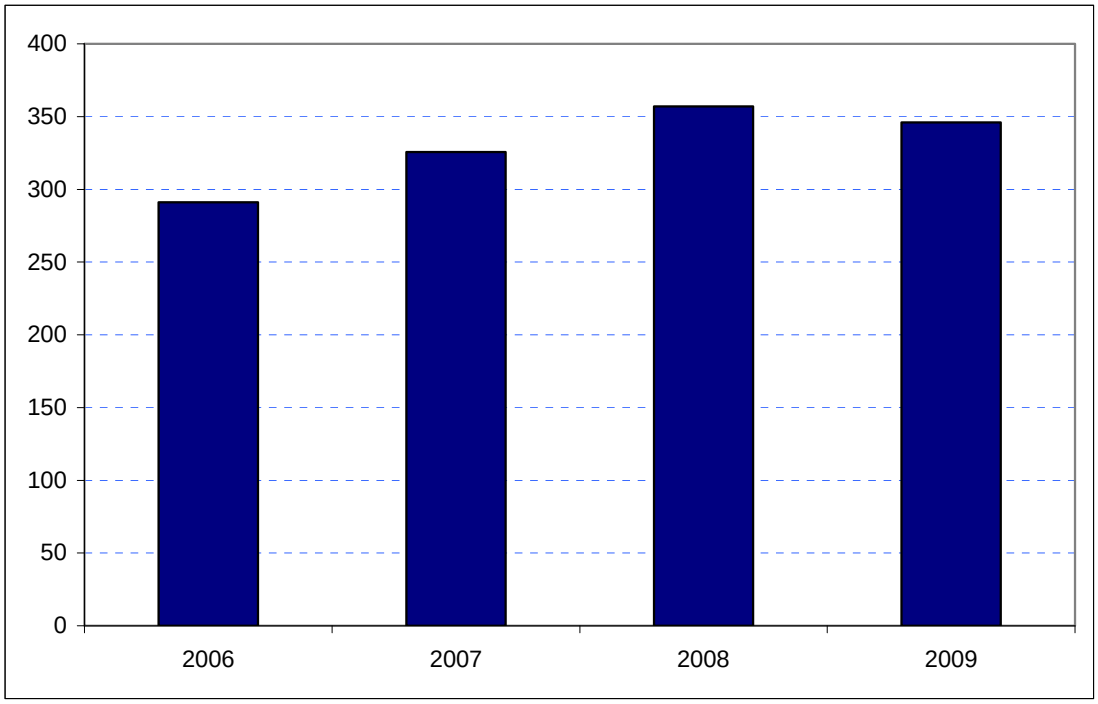


Sources: IPS, UKTS, BRES, LDA surveys and GLA Economics calculations

Hillingdon
Borough Rank: 7

Estimates in Figure 5.17 show net gains in Hillingdon's overseas visitor spend since 2006 and 2007. Hillingdon includes Heathrow Airport. Spend increased from £291 million in 2006 to £326 million in 2007 and £357 million in 2008 before falling to £346 million in 2009.

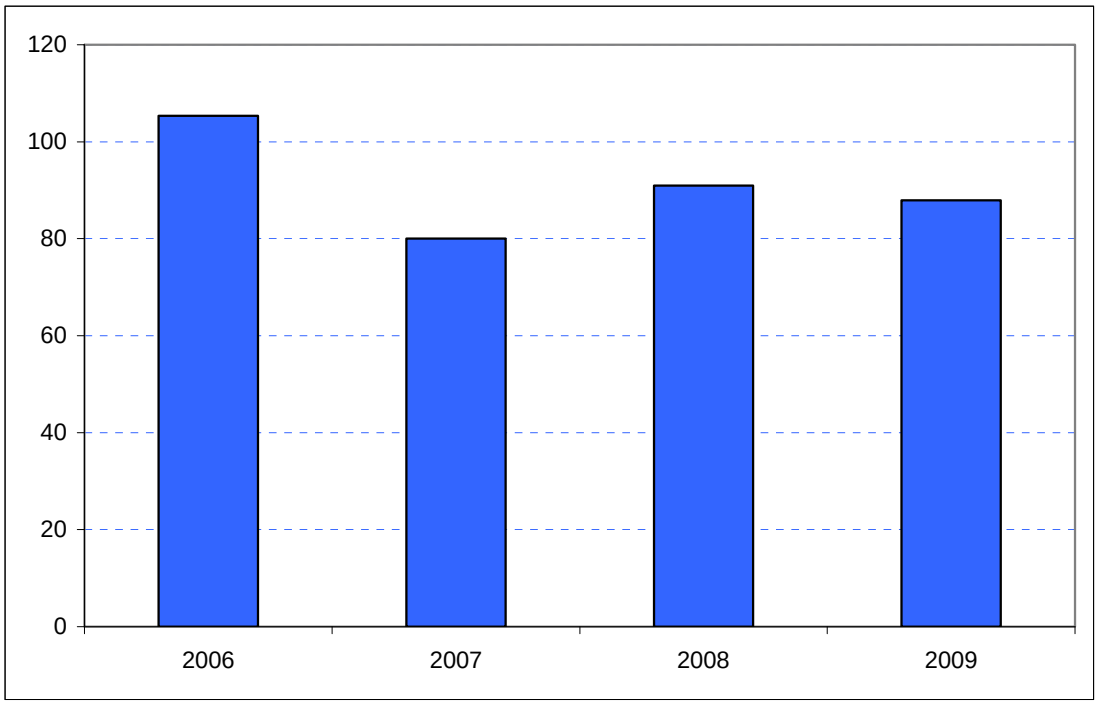
Figure 5.17: Overseas tourism expenditure in Hillingdon (£ millions)



Sources: IPS, BRES, LDA surveys and GLA Economics calculations

Figure 6.17 presents estimates for domestic overnight visitors in Hillingdon. These present a far more inconsistent picture of spend in the Borough since 2006. In 2006 spend was estimated to be £105 million. This is estimated to have dropped to £80 million in 2007, risen back to £91 million in 2008 and then fallen to £88 million in 2009.

Figure 6.17: Domestic staying tourism expenditure in Hillingdon (£ millions)



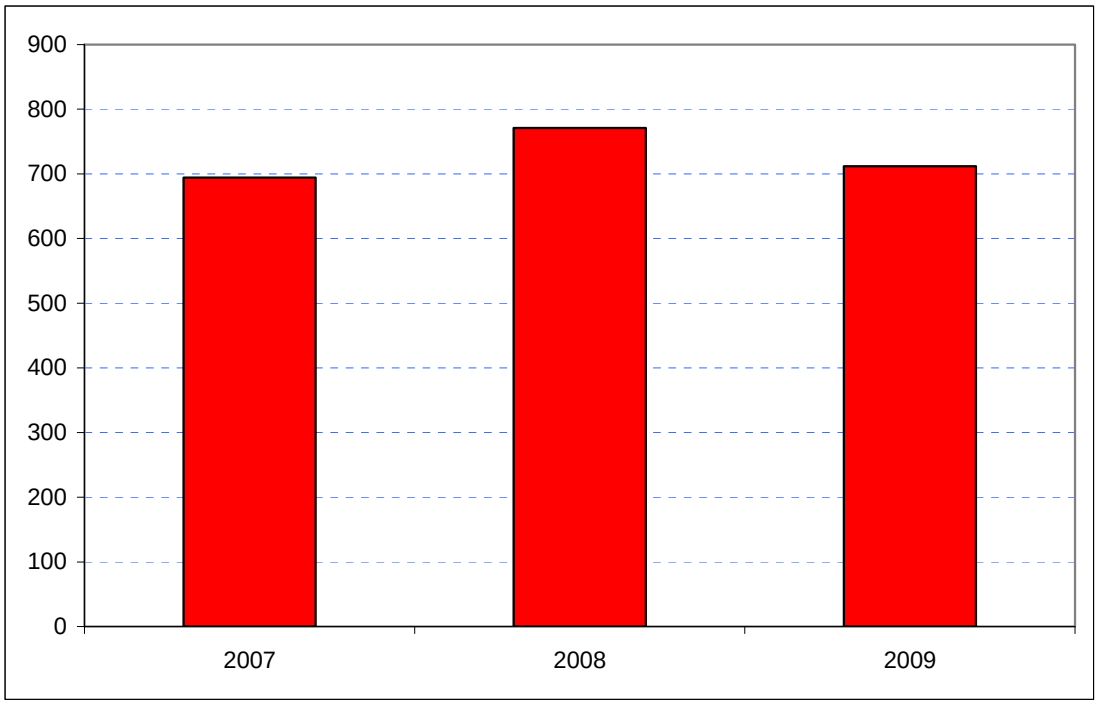
Sources: UKTS, BRES, LDA surveys and GLA Economics calculations

An experimental estimate of day visitor spend is provided in Tables 2a and 2b of Chapter 2. It should be emphasised that these are modelled estimates and further details of the data issues presented by day visitor tourism can be found in GLA Economics' Current Issues Note 29[23]. Details of the modelling and changes to it from previous LATI estimates can be found in the methodology section.

In spite of the erratic patterns in domestic overnight spend, when the experimental day visitor spend estimates are included, total estimated tourist expenditure shows a broadly stable picture (see Figure 7.17). Receipts in 2007 had been £697 million, increasing to £771 million in 2008 before slipping back to £712 million in 2009. Data for 2006 were excluded from the graphic as they would have introduced the additional problem of a change of survey basis for the day visitor estimates prior to 2007.

[23] http://www.london.gov.uk/publication/estimating-contribution-leisure-day-visitors-londons-tourism-industry
GLA Economics - Estimating the contribution of leisure day visitors to London's tourism industry (March 2011)

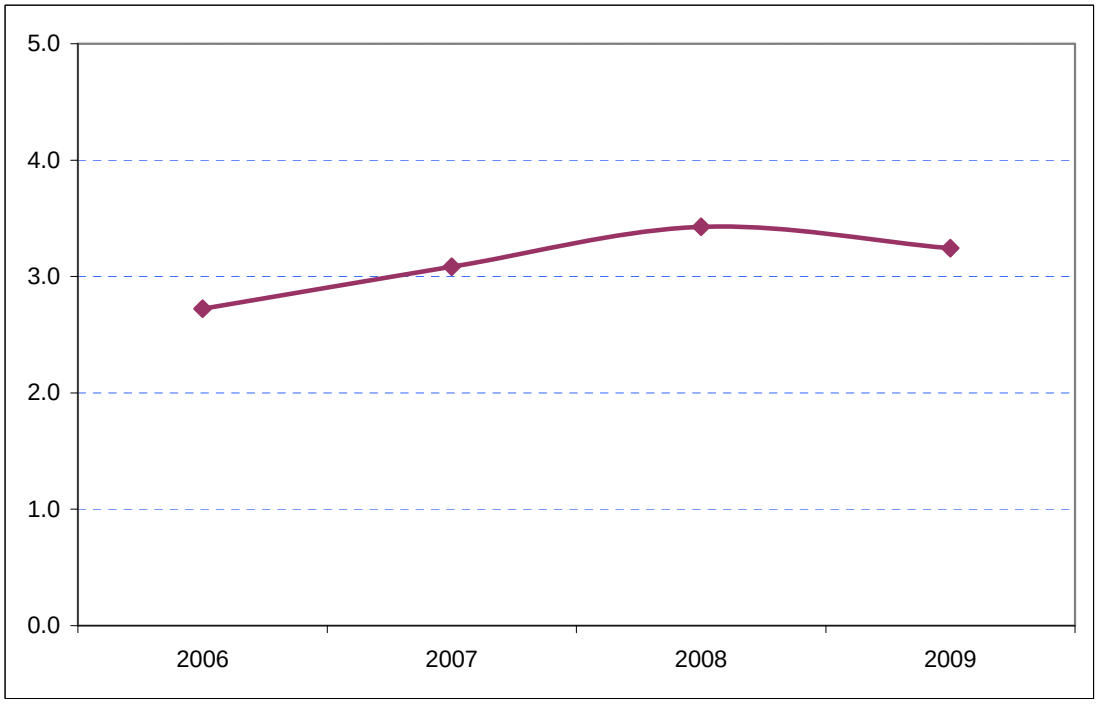
Figure 7.17: Estimates of total tourism expenditure in Hillingdon including experimental estimates of day visitor spend (£ millions)



Sources: IPS, UKTS, BRES, LDA surveys and GLA Economics calculations

Figure 8.17 shows that Hillingdon's share of total London tourism expenditure has increased since 2006 from 2.7 per cent to 3.2 per cent of London's total although the Borough's highest share (3.4 per cent) was in 2008.

Figure 8.17: Hillingdon's estimated share of total London tourism expenditure (%)

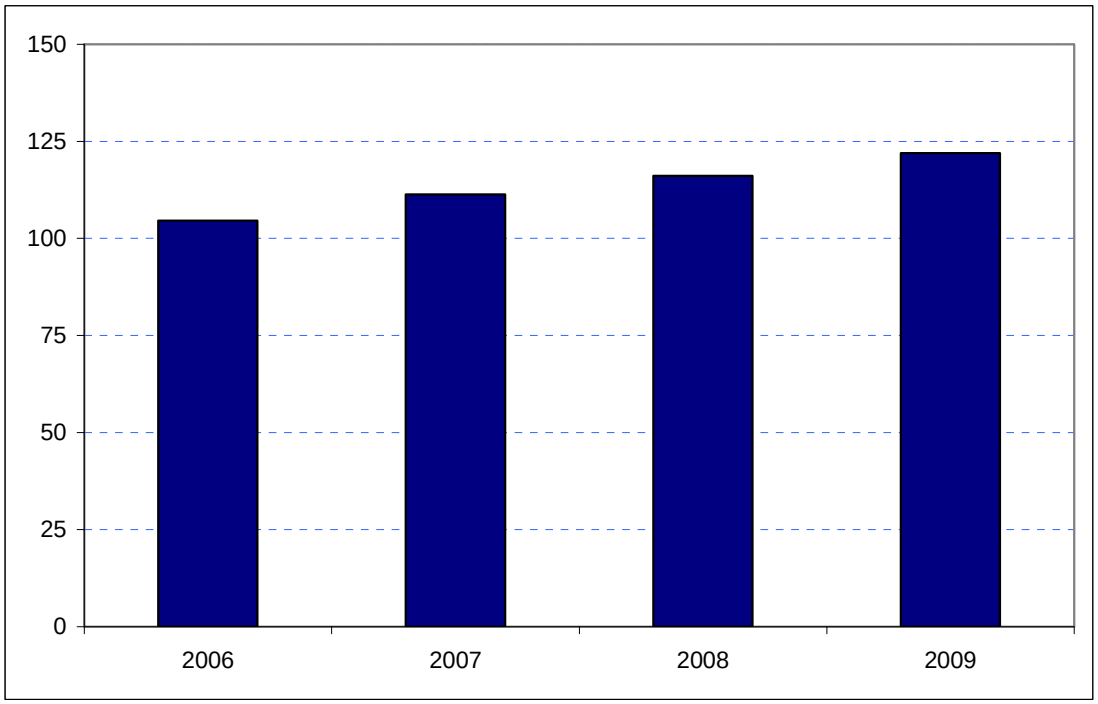


Sources: IPS, UKTS, BRES, LDA surveys and GLA Economics calculations

Hounslow
Borough Rank: 19

Estimates in Figure 5.18 show a net (and consistent) gain in Hounslow's overseas visitor spend since 2006. Spend rose from £105 million in 2006 to £112 million in 2007, £116 million in 2008 and £122 million in 2009.

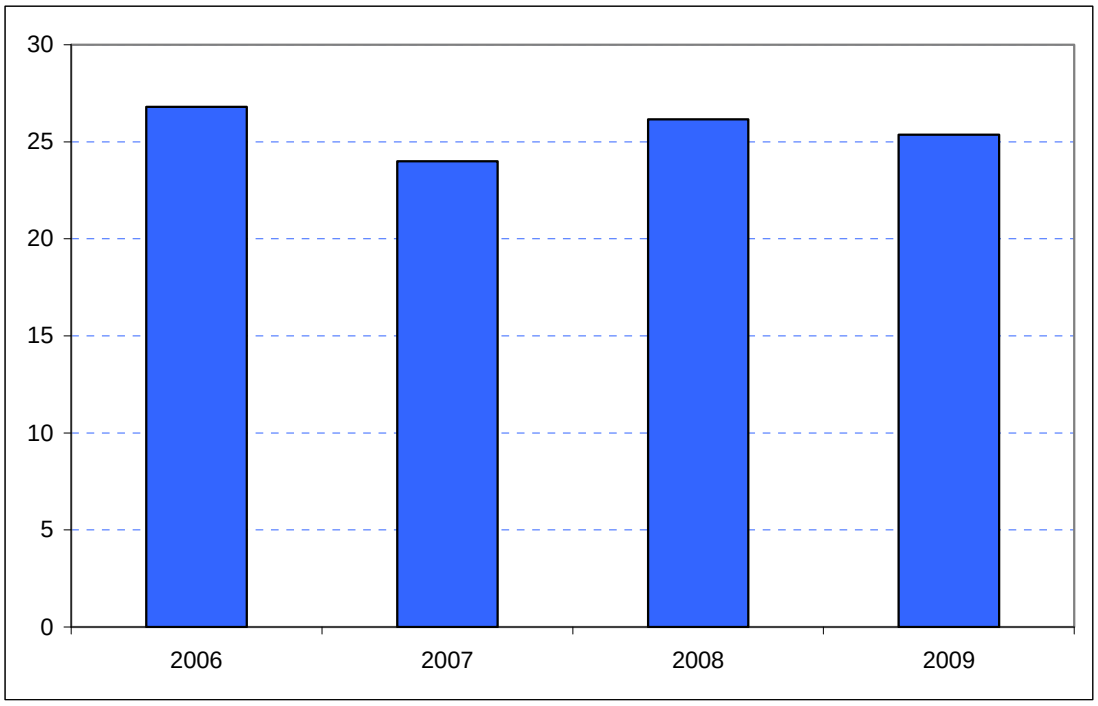
Figure 5.18: Overseas tourism expenditure in Hounslow (£ millions)



Sources: IPS, BRES, LDA surveys and GLA Economics calculations

In contrast the picture from domestic overnight visitor spend in Hounslow shown in Figure 6.18 is rather more erratic. Spend fell from £27 million in 2006 to £24 million in 2007 before recovering in 2008 to £26 million. 2009 saw a slight fall back to £25 million.

Figure 6.18: Domestic staying tourism expenditure in Hounslow (£ millions)



Sources: UKTS, BRES, LDA surveys and GLA Economics calculations

An experimental estimate of day visitor spend is provided in Tables 2a and 2b of Chapter 2. It should be emphasised that these are modelled estimates and further details of the data issues presented by day visitor tourism can be found in GLA Economics' Current Issues Note 29[24]. Details of the modelling and changes to it from previous LATI estimates can be found in the methodology section.

When the experimental day visitor estimates are included, total estimated tourist expenditure exhibited a net rise between 2007 and 2009 as shown in Figure 7.18. Receipts in 2007 had been £354 million, increasing to £374 million in 2008 before slipping back marginally to £370 million in 2009. Data for 2006 were excluded from the graphic as they would have introduced the additional problem of a change of survey basis for the day visitor estimates prior to 2007.

[24] http://www.london.gov.uk/publication/estimating-contribution-leisure-day-visitors-londons-tourism-industry
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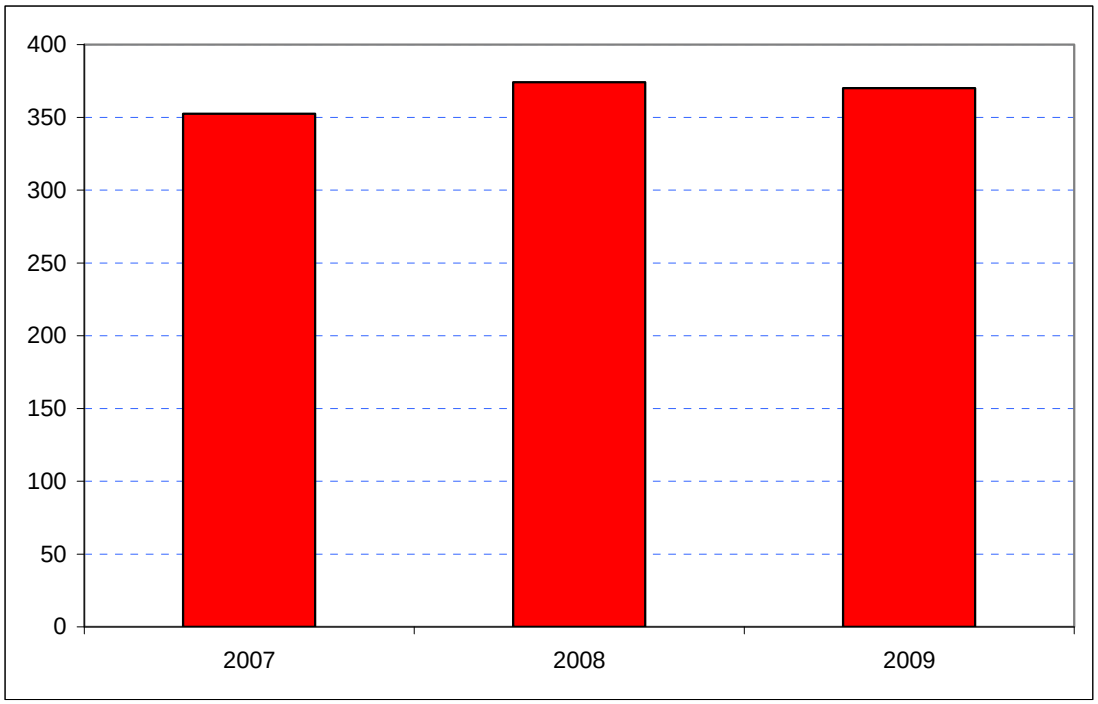
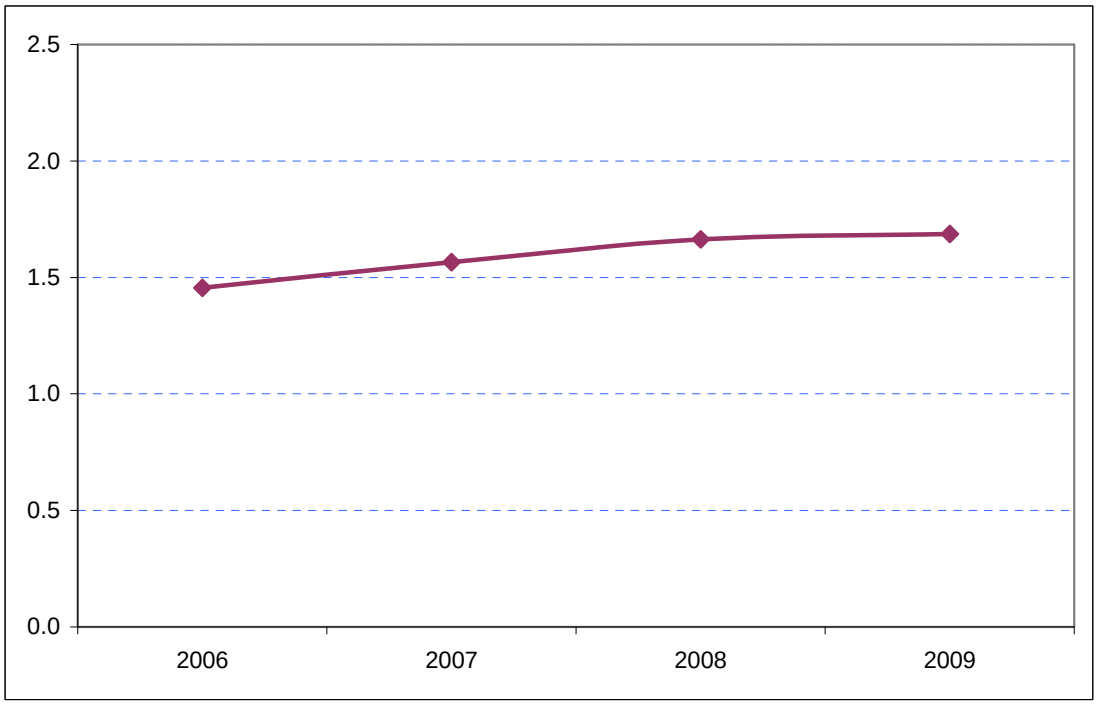
Figure 7.18: Estimates of total tourism expenditure in Hounslow including experimental estimates of day visitor spend (£ millions)



Sources: IPS, UKTS, BRES, LDA surveys and GLA Economics calculations

Figure 8.18 shows that Hounslow's share of total London tourism expenditure has increased from under 1.5 per cent in 2006 to 1.7 per cent in 2009.

Figure 8.18: Hounslow's estimated share of total London tourism expenditure (%)

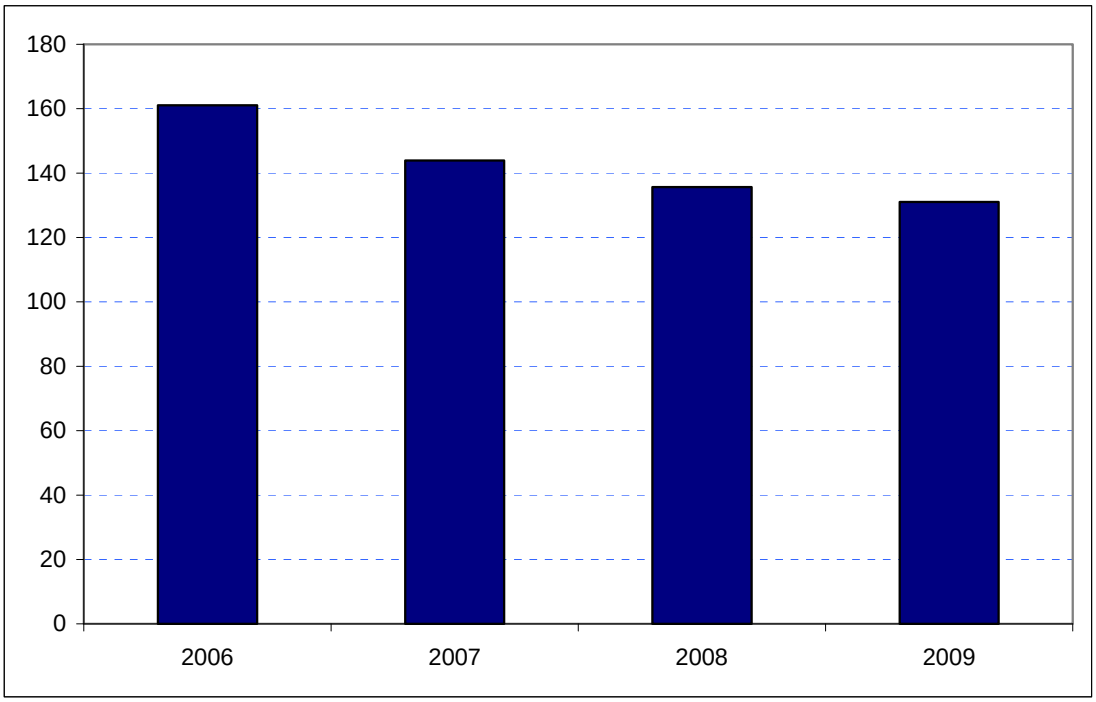


Sources: IPS, UKTS, BRES, LDA surveys and GLA Economics calculations

Islington
Borough Rank: 15

Estimates in Figure 5.19 show a consistent fall in Islington's overseas visitor spend since 2006. Spend fell from £161 million in 2006 to £144 million in 2007, £136 million in 2008 and down to £131 million in 2009.

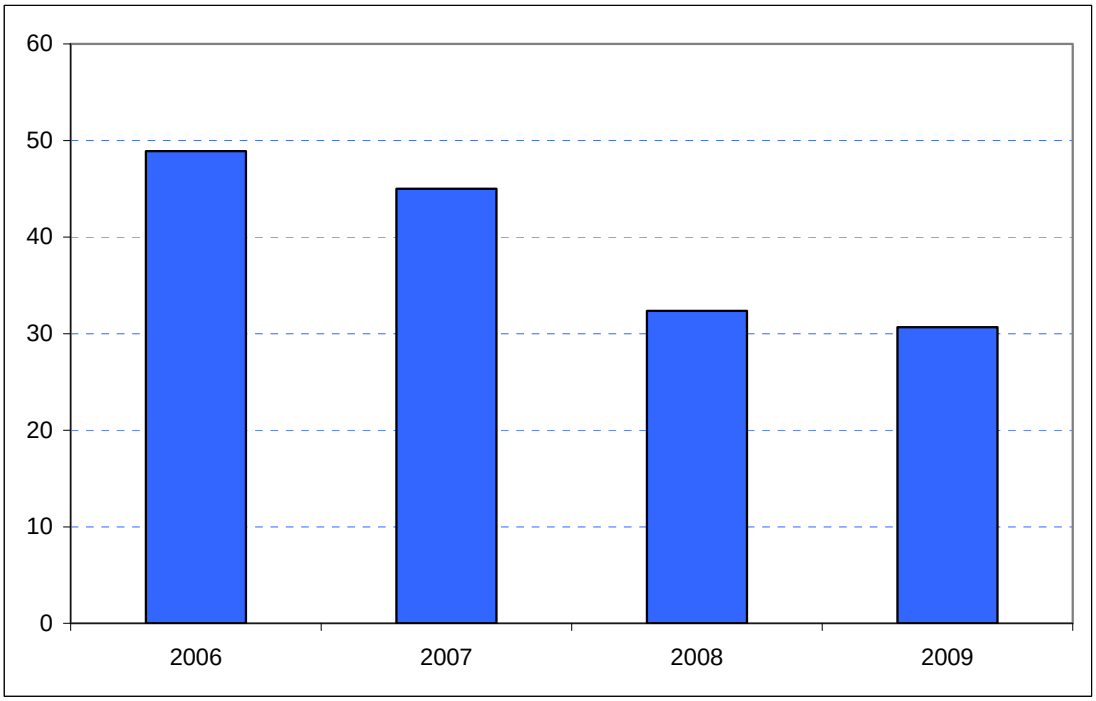
Figure 5.19: Overseas tourism expenditure in Islington (£ millions)



Sources: IPS, BRES, LDA surveys and GLA Economics calculations

A fall has also been registered in domestic overnight visitor spend in the Borough as shown in Figure 6.19. Spend fell from £49 million in 2006 to £45 million in 2007 and again in 2008 to £32 million. 2009 saw a stabilisation at £31 million.

Figure 6.19: Domestic staying tourism expenditure in Islington (£ millions)



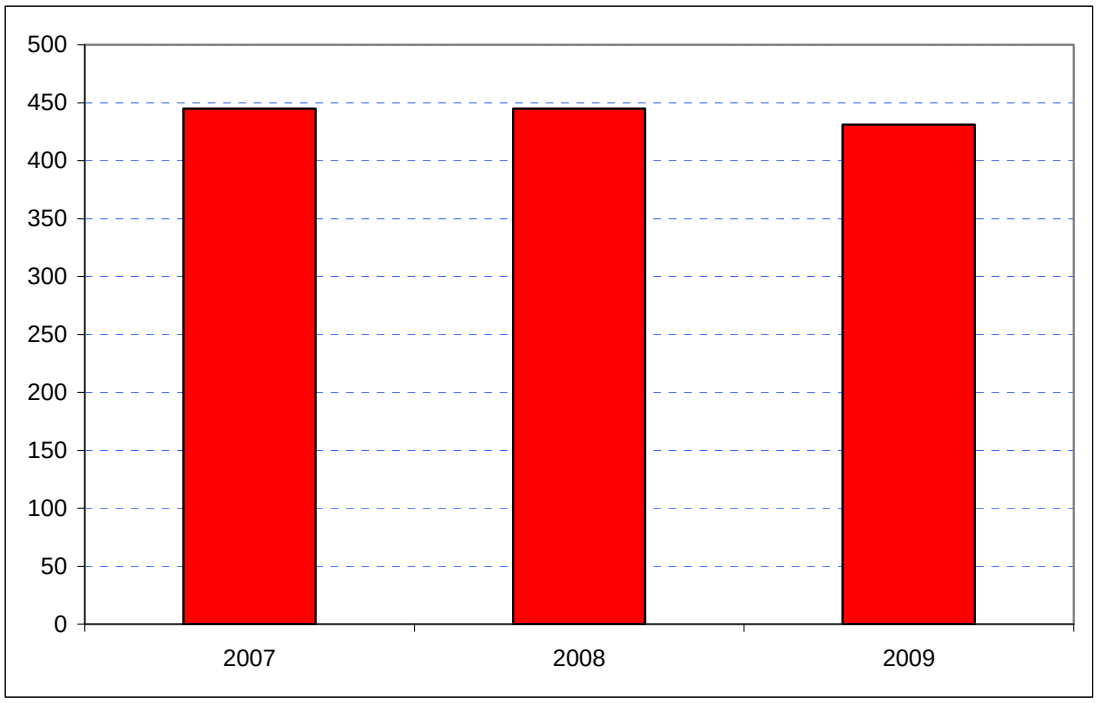
Sources: UKTS, BRES, LDA surveys and GLA Economics calculations

An experimental estimate of day visitor spend is provided in Tables 2a and 2b of Chapter 2. It should be emphasised that these are modelled estimates and further details of the data issues presented by day visitor tourism can be found in GLA Economics' Current Issues Note 29[25]. Details of the modelling and changes to it from previous LATI estimates can be found in the methodology section.

When the experimental day visitor estimates are included, total estimated tourist expenditure was a little more stable but, nevertheless, still down between 2007 and 2009 as shown in Figure 7.19. Receipts in 2007 had been £445 million, which remained stable in 2008 before slipping back to £431 million in 2009. Data for 2006 were excluded from the graphic as they would have introduced the additional problem of a change of survey basis for the day visitor estimates prior to 2007.

[25] http://www.london.gov.uk/publication/estimating-contribution-leisure-day-visitors-londons-tourism-industry
GLA Economics - Estimating the contribution of leisure day visitors to London's tourism industry (March 2011)

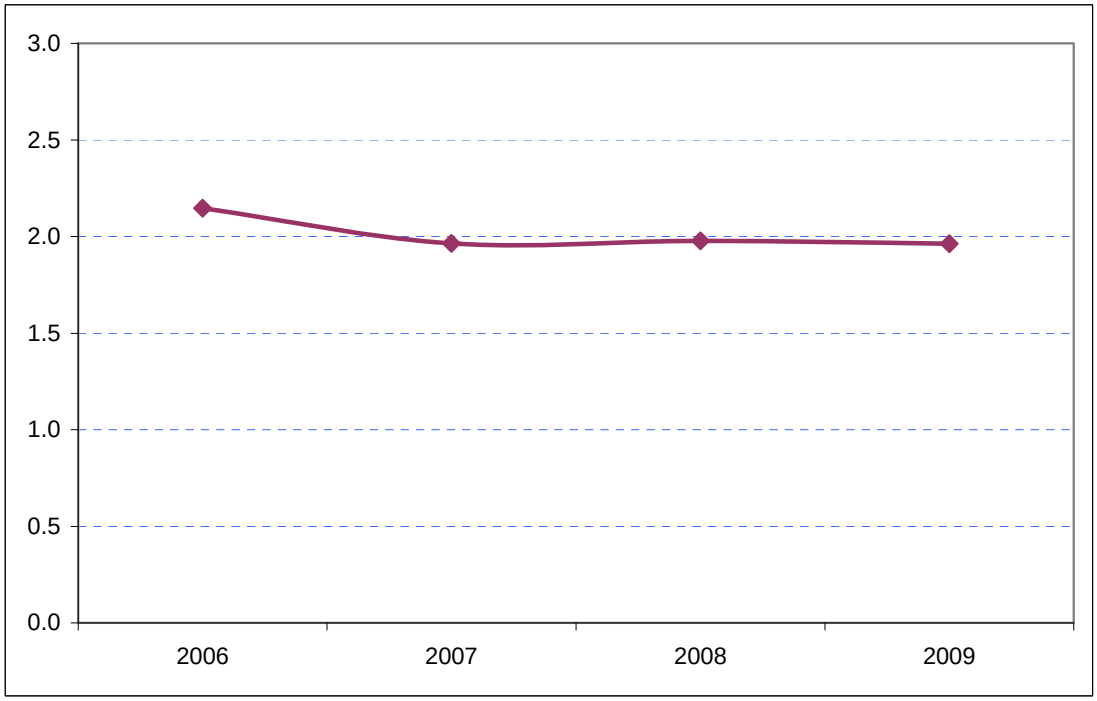
Figure 7.19: Estimates of total tourism expenditure in Islington including experimental estimates of day visitor spend (£ millions)



Sources: IPS, UKTS, BRES, LDA surveys and GLA Economics calculations

Figure 8.19 shows that Islington's share of total London tourism expenditure has fallen slightly from over 2.1 per cent in 2006 to being consistently just under 2.0 per cent in the three subsequent years.

Figure 8.19: Islington's estimated share of total London tourism expenditure (%)

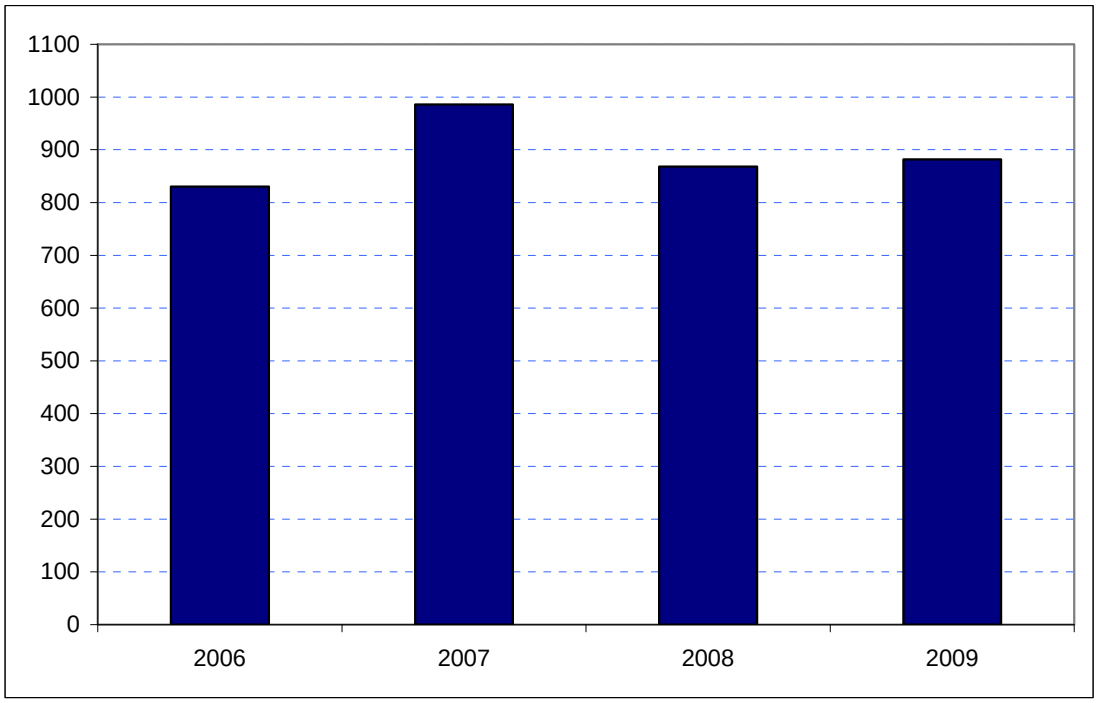


Sources: IPS, UKTS, BRES, LDA surveys and GLA Economics calculations

Kensington and Chelsea
Borough Rank: 2

Estimates in Figure 5.20 show a decrease in overseas visitor spend in Kensington & Chelsea from its 2007 level and a stabilisation thereafter. Spending fell from £986 million in 2007 to £868 million in 2008 but rose to £882 million in 2009.

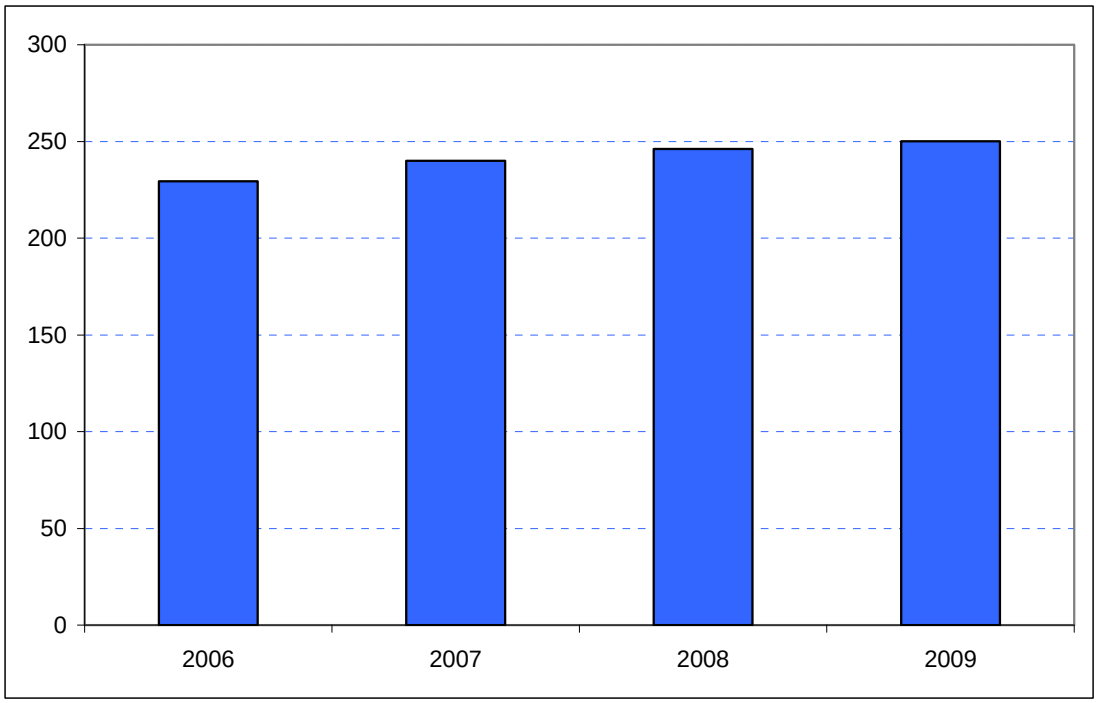
Figure 5.20: Overseas tourism expenditure in Kensington & Chelsea (£ millions)



Sources: IPS, BRES, LDA surveys and GLA Economics calculations

Figure 6.20 contains estimates by domestic overnight visitors in Kensington & Chelsea. These indicate steady growth in receipts from £229 million in 2006 to £246 million in 2008 and to £250 million in 2009.

Figure 6.20: Domestic staying tourism expenditure in Kensington & Chelsea (£ millions)



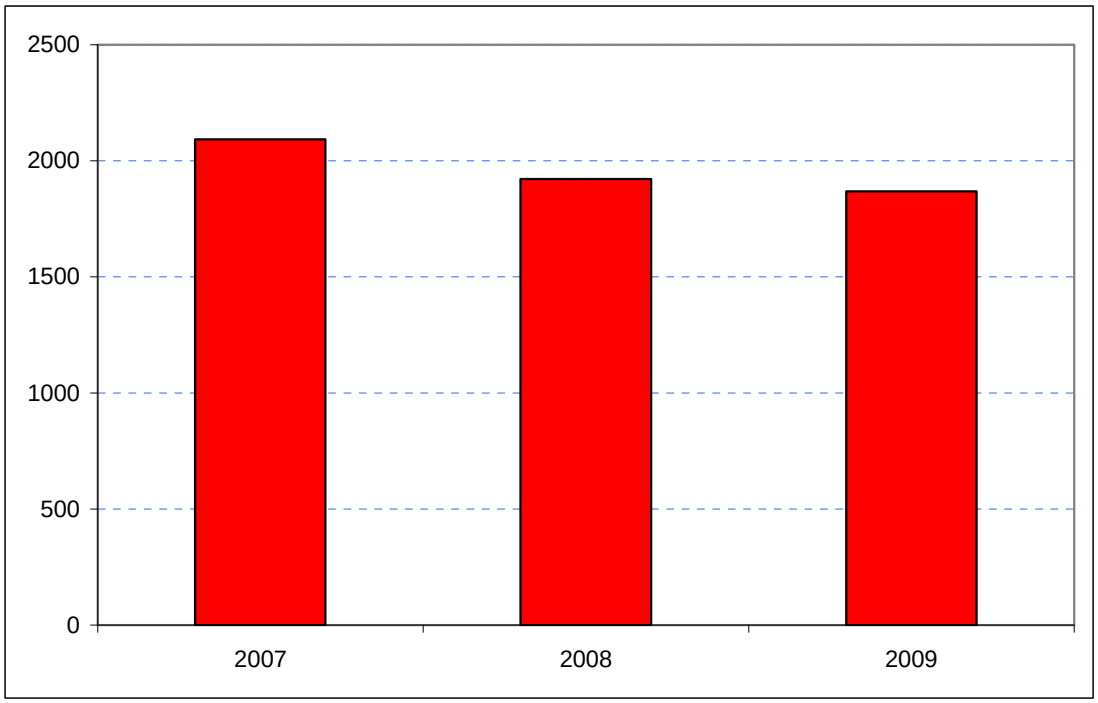
Sources: UKTS, BRES, LDA surveys and GLA Economics calculations

An experimental estimate of day visitor spend is provided in Tables 2a and 2b of Chapter 2. It should be emphasised that these are modelled estimates and further details of the data issues presented by day visitor tourism can be found in GLA Economics' Current Issues Note 29[26]. Details of the modelling and changes to it from previous LATI estimates can be found in the methodology section.

When the experimental day visitor estimates are included, total estimated tourism expenditure in Kensington & Chelsea fell modestly in each of the two years from £2,092 million in 2007 to £1,921 million and £1,868 million respectively as shown in Figure 7.20. Data for 2006 were excluded from the graphic as they would have introduced the additional problem of a change of survey basis for the day visitor estimates prior to 2007.

[26] http://www.london.gov.uk/publication/estimating-contribution-leisure-day-visitors-londons-tourism-industry
GLA Economics - Estimating the contribution of leisure day visitors to London's tourism industry (March 2011)

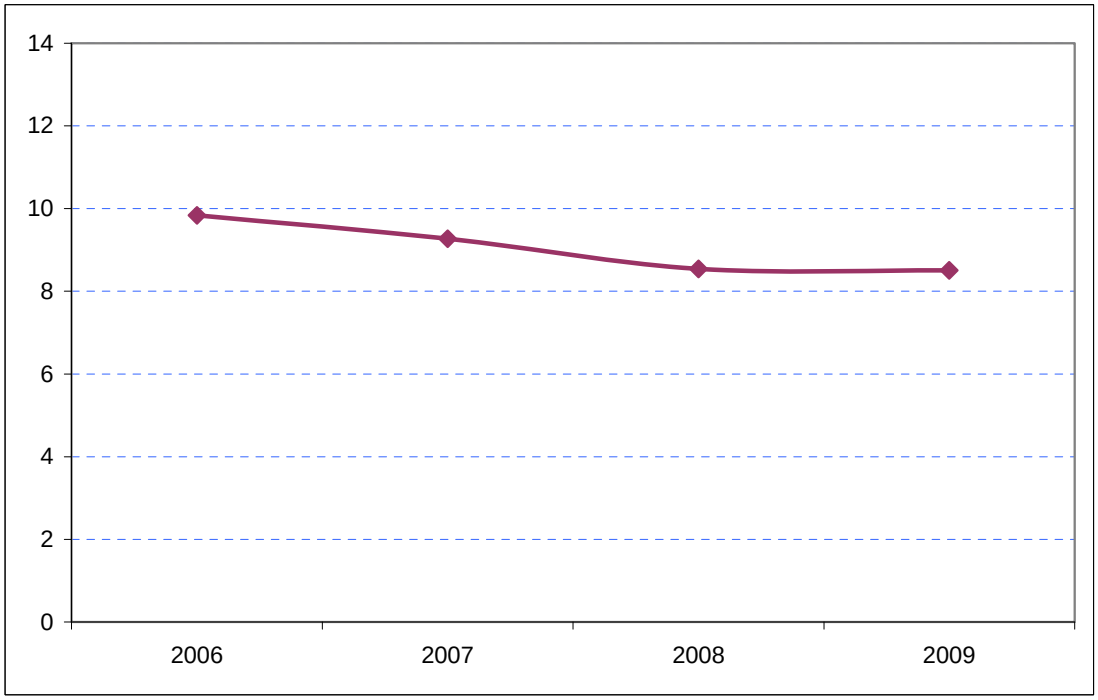
Figure 7.20: Estimates of total tourism expenditure in Kensington & Chelsea including experimental estimates of day visitor spend (£ millions)



Sources: IPS, UKTS, BRES, LDA surveys and GLA Economics calculations

Figure 8.20 shows a fall in Kensington & Chelsea's share of London's spend to 8.5% in both 2008 and 2009 from 9.9 per cent in 2006.

Figure 8.20: Kensington & Chelsea's estimated share of total London tourism expenditure (%)

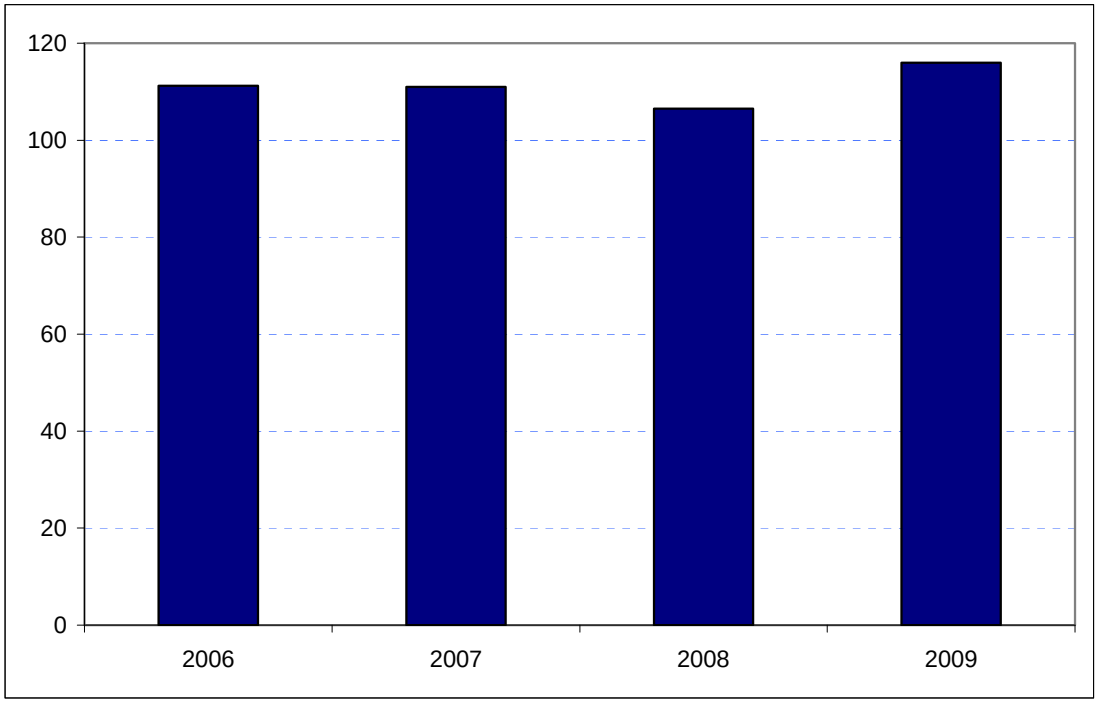


Sources: IPS, UKTS, BRES, LDA surveys and GLA Economics calculations

Kingston-upon-Thames
Borough Rank: 20

Estimates in Figure 5.21 show a broadly stable level of overseas visitor spend in Kingston since 2006. Spend was constant between 2006 and 2007 at £111 million. The results show a fall in overseas visitor spend for 2008 to £107 million, followed by a recovery to £116 million for the latest year. This makes Kingston one of the least volatile Boroughs on this measure.

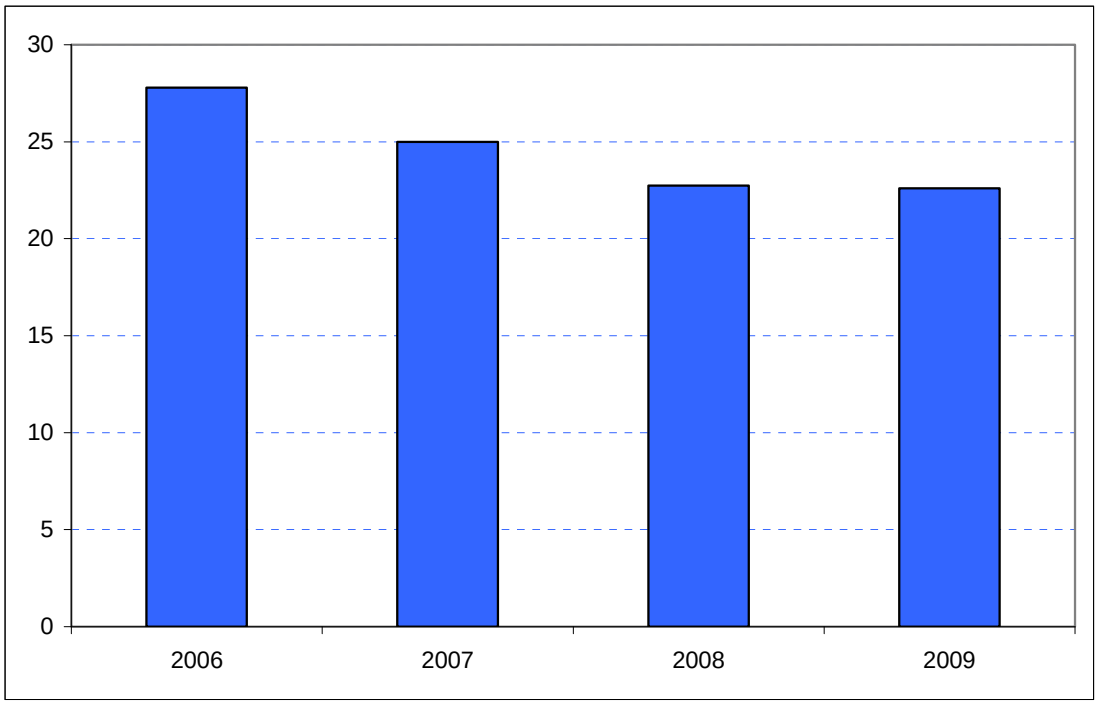
Figure 5.21: Overseas tourism expenditure in Kingston (£ millions)



Sources: IPS, BRES, LDA surveys and GLA Economics calculations

This consistency has also been reflected in domestic overnight visitor spend in the Borough since 2008 as shown in Figure 6.21. However, spend fell from £28 million to £25 million between 2006 and 2007 and it has fallen slightly further since to £23 million.

Figure 6.21: Domestic staying tourism expenditure in Kingston (£ millions)



Sources: UKTS, BRES, LDA surveys and GLA Economics calculations

An experimental estimate of day visitor spend is provided in Tables 2a and 2b of Chapter 2. It should be emphasised that these are modelled estimates and further details of the data issues presented by day visitor tourism can be found in GLA Economics' Current Issues Note 29[27]. Details of the modelling and changes to it from previous LATI estimates can be found in the methodology section.

When the experimental day visitor estimates are included, there is more variability in tourist spend – as shown in Figure 7.21. Spend fell from the 2007 figure of £360 million to £338 million in 2008 before a further, more marginal, fall in 2009 to £335 million. Data for 2006 were excluded from the graphic as they would have introduced the additional problem of a change of survey basis for the day visitor estimates prior to 2007.

[27] http://www.london.gov.uk/publication/estimating-contribution-leisure-day-visitors-londons-tourism-industry
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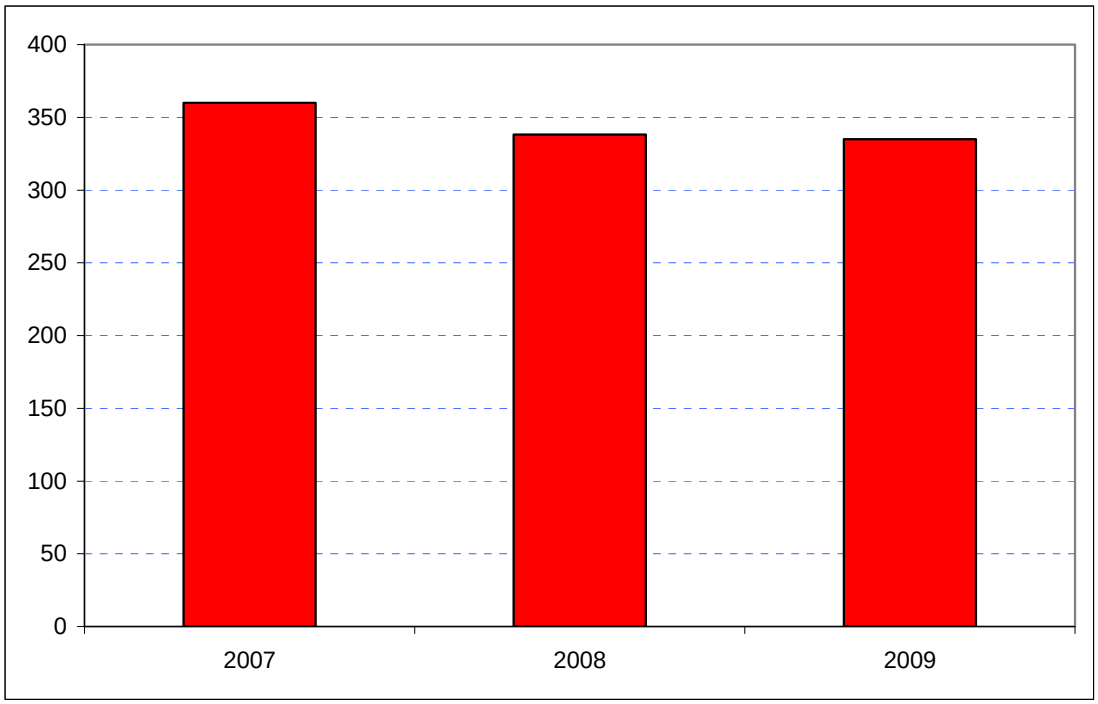
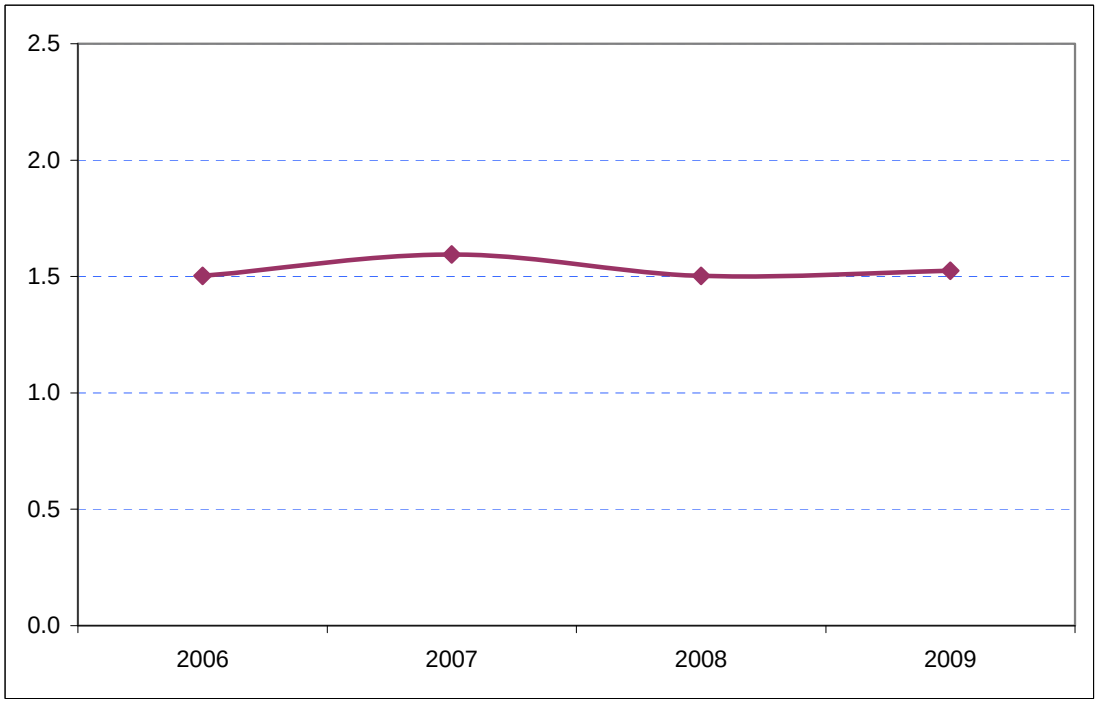
Figure 7.21: Estimates of total tourism expenditure in Kingston including experimental estimates of day visitor spend (£ millions)



Sources: IPS, UKTS, BRES, LDA surveys and GLA Economics calculations

Figure 8.21 shows that Kingston's share of total London tourism expenditure has been very consistent, representing just over 1.5 per cent in most years and 1.6 per cent in 2007.

Figure 8.21: Kingston's estimated share of total London tourism expenditure (%)

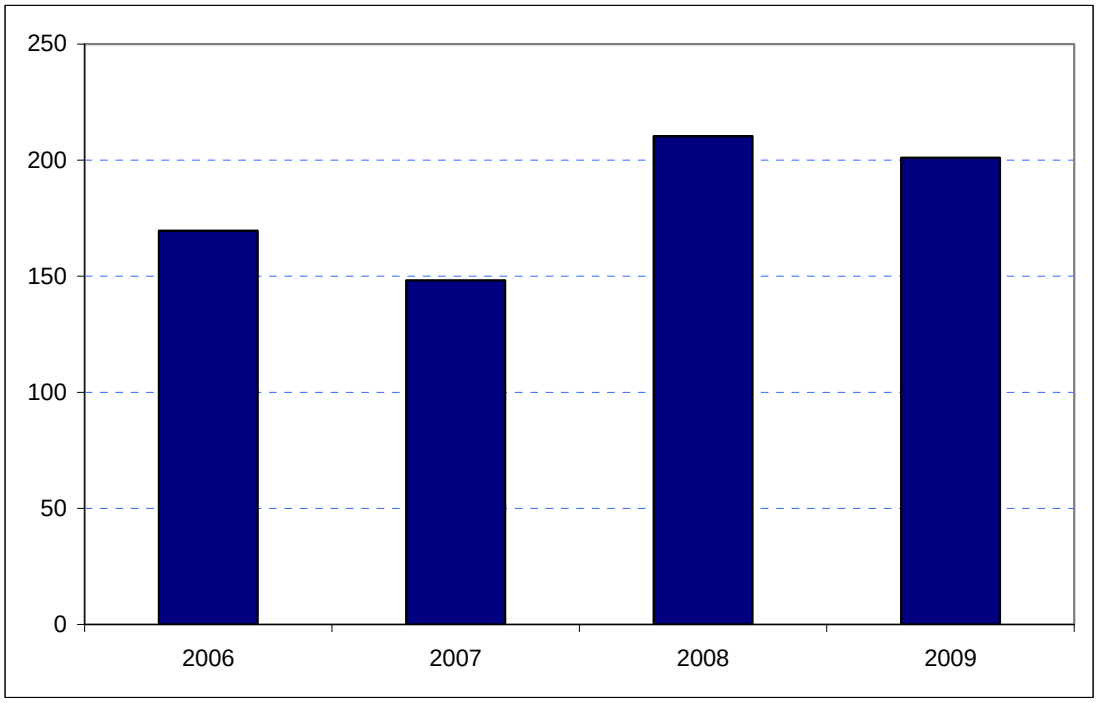


Sources: IPS, UKTS, BRES, LDA surveys and GLA Economics calculations

Lambeth
Borough Rank: 6

Estimates in Figure 5.22 demonstrate a rather erratic pattern in Lambeth's overseas visitor spend since 2006. Spend fell from £170 million to £148 million between 2006 and 2007. The weak result in 2007 was then followed by a large increase in overseas tourism spend to £210 million in 2008. Spend then fell back in 2009 to £201 million. These results and those for total spend including the experimental day visits numbers are largely driven by relatively large changes in accommodation employment in Lambeth between 2007 and 2008.

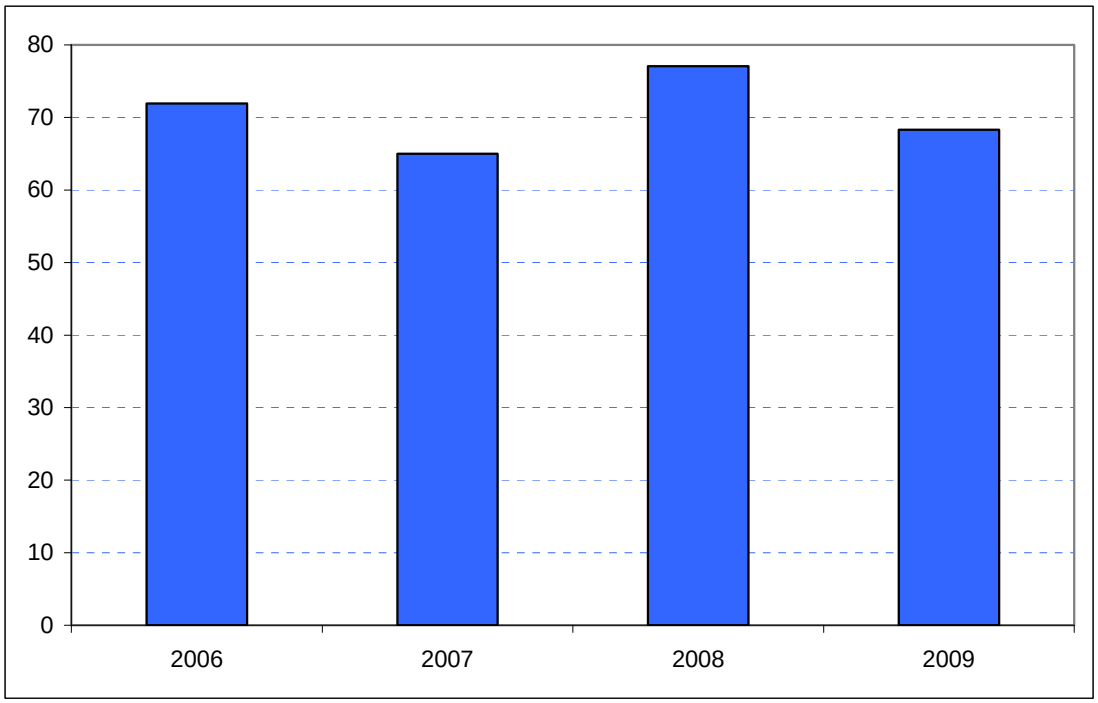
Figure 5.22: Overseas tourism expenditure in Lambeth (£ millions)



Sources: IPS, BRES, LDA surveys and GLA Economics calculations

Variability has also characterised domestic overnight visitor spend results for Lambeth since 2006 – as shown in Figure 6.22. Spend fell sharply from £72 million in 2006 to £65 million in 2007. The estimates show spend of £77 million in 2008 followed by a fall to £68 million in 2009.

Figure 6.22: Domestic staying tourism expenditure in Lambeth (£ millions)



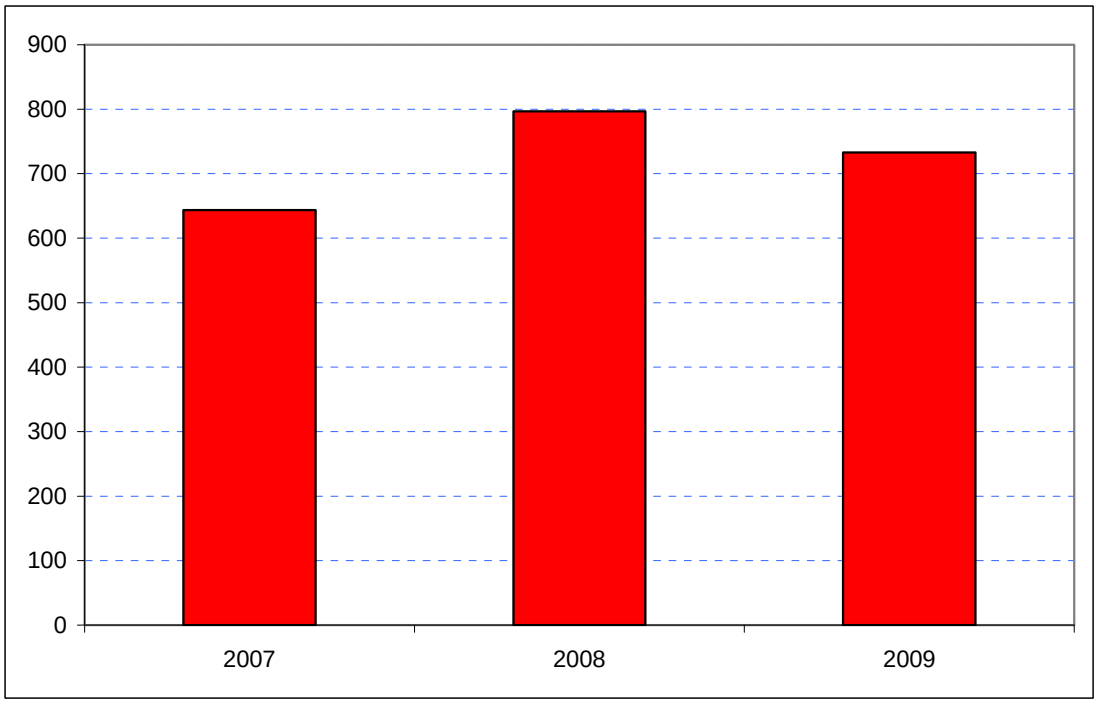
Sources: UKTS, BRES, LDA surveys and GLA Economics calculations

An experimental estimate of day visitor spend is provided in Tables 2a and 2b of Chapter 2. It should be emphasised that these are modelled estimates and further details of the data issues presented by day visitor tourism can be found in GLA Economics' Current Issues Note 29[28]. Details of the modelling and changes to it from previous LATI estimates can be found in the methodology section.

Perhaps unsurprisingly, once the experimental day visitor estimates are included, there is continued volatility in tourist spend – as shown in Figure 7.22. Total spend rose from £645 million in 2007 to £797 million in 2008 before falling back to £733 million in 2009. Data for 2006 were excluded from the graphic as they would have introduced the additional problem of a change of survey basis for the day visitor estimates prior to 2007.

[28] http://www.london.gov.uk/publication/estimating-contribution-leisure-day-visitors-londons-tourism-industry
GLA Economics - Estimating the contribution of leisure day visitors to London's tourism industry (March 2011)

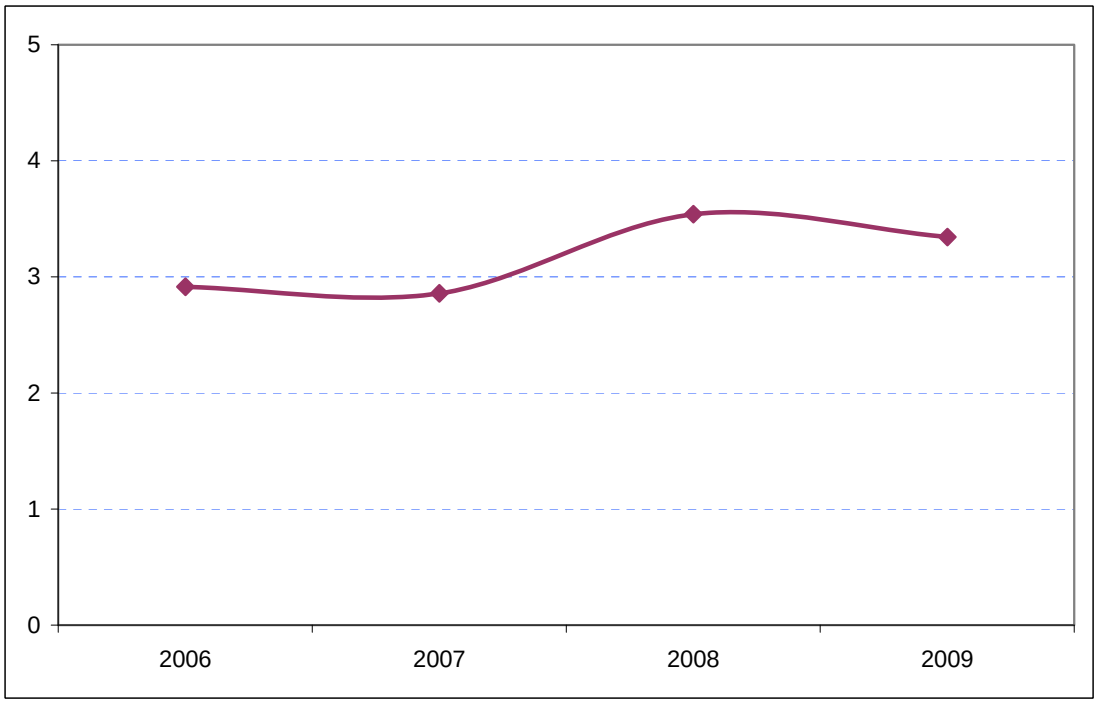
Figure 7.22: Estimates of total tourism expenditure in Lambeth including experimental estimates of day visitor spend (£ millions)



Sources: IPS, UKTS, BRES, LDA surveys and GLA Economics calculations

With the caveats regarding year-to-year volatility in the data, Lambeth's share of total London tourism expenditure – as shown in Figure 8.22 – does appear to have risen from 2.9 per cent to around 3.3 per cent.

Figure 8.22: Lambeth's estimated share of total London tourism expenditure (%)

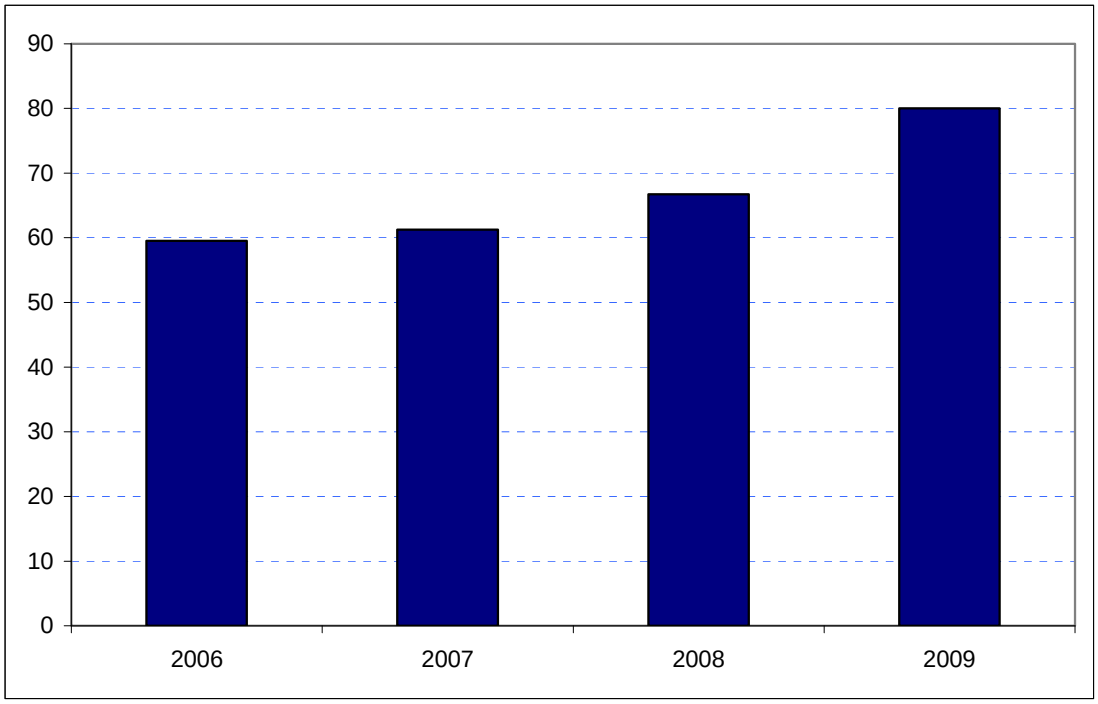


Sources: IPS, UKTS, BRES, LDA surveys and GLA Economics calculations

Lewisham
Borough Rank: 30

Estimates in Figure 5.23 show a strong increase in Lewisham's overseas visitor spend since 2006. Between 2006 and 2007 the increase was small: from £60 million to £61 million. Subsequently, increases have been greater: to £67 million in 2008 and £80 million in 2009.

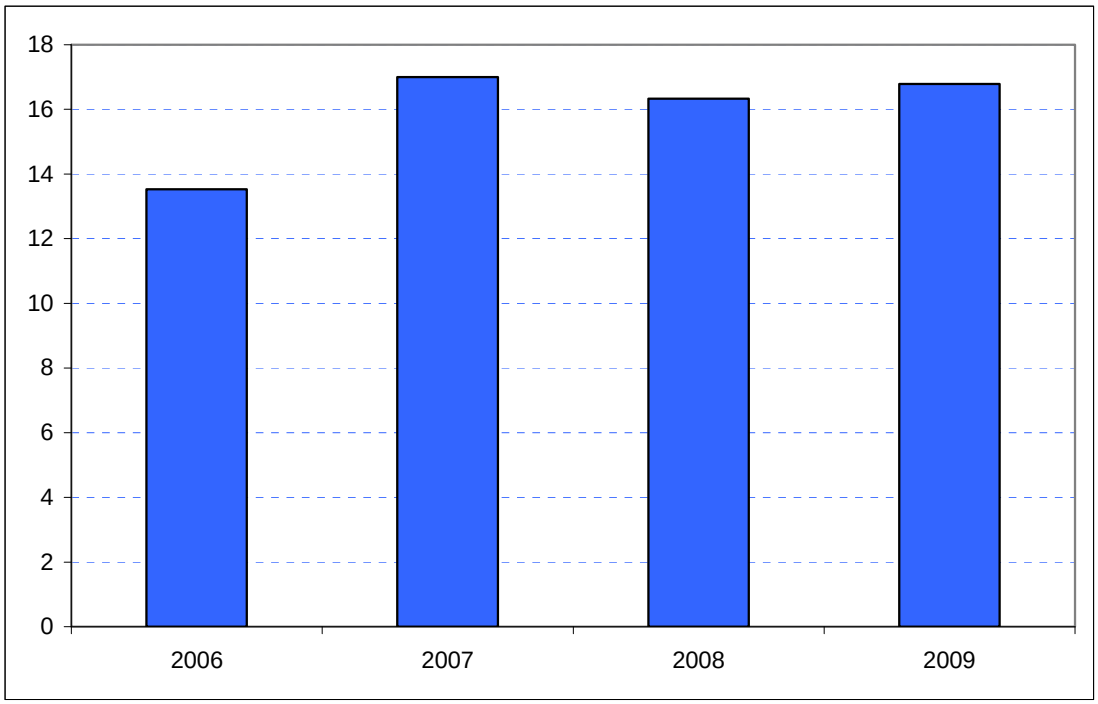
Figure 5.23: Overseas tourism expenditure in Lewisham (£ millions)



Sources: IPS, BRES, LDA surveys and GLA Economics calculations

This consistent pattern of year-on-year increases has also been largely reflected in domestic overnight visitor spend in the Borough since 2006 as shown in Figure 6.23. In 2006 domestic overnight spend was estimated to be under £14 million. Between 2007 and 2009 it has been broadly stable at around £17 million (£16 million in 2008).

Figure 6.23: Domestic staying tourism expenditure in Lewisham (£ millions)



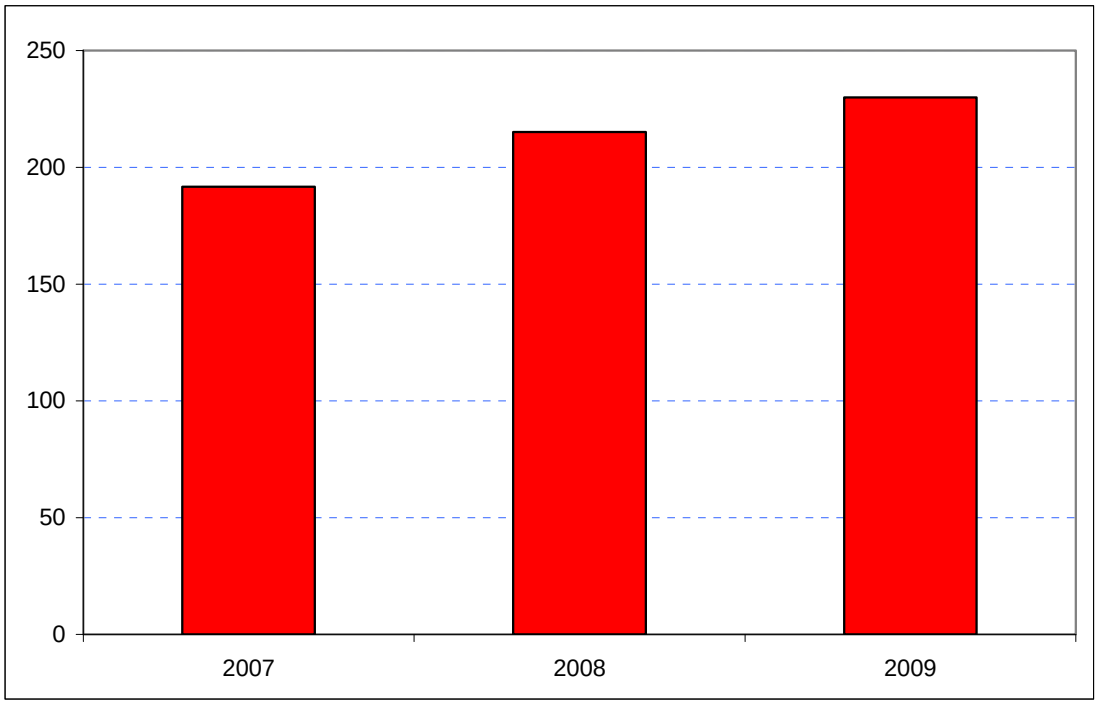
Sources: UKTS, BRES, LDA surveys and GLA Economics calculations

An experimental estimate of day visitor spend is provided in Tables 2a and 2b of Chapter 2. It should be emphasised that these are modelled estimates and further details of the data issues presented by day visitor tourism can be found in GLA Economics' Current Issues Note 29[29]. Details of the modelling and changes to it from previous LATI estimates can be found in the methodology section.

When the experimental day visitor estimates are included, the pattern of persistent increases from one year to the next continues – as shown in Figure 7.23. Spend rose from £193 million in 2007 to £215 million in 2008 and £230 million in 2009. Data for 2006 were excluded from the graphic as they would have introduced the additional problem of a change of survey basis for the day visitor estimates prior to 2007.

[29] http://www.london.gov.uk/publication/estimating-contribution-leisure-day-visitors-londons-tourism-industry
GLA Economics - Estimating the contribution of leisure day visitors to London's tourism industry (March 2011)

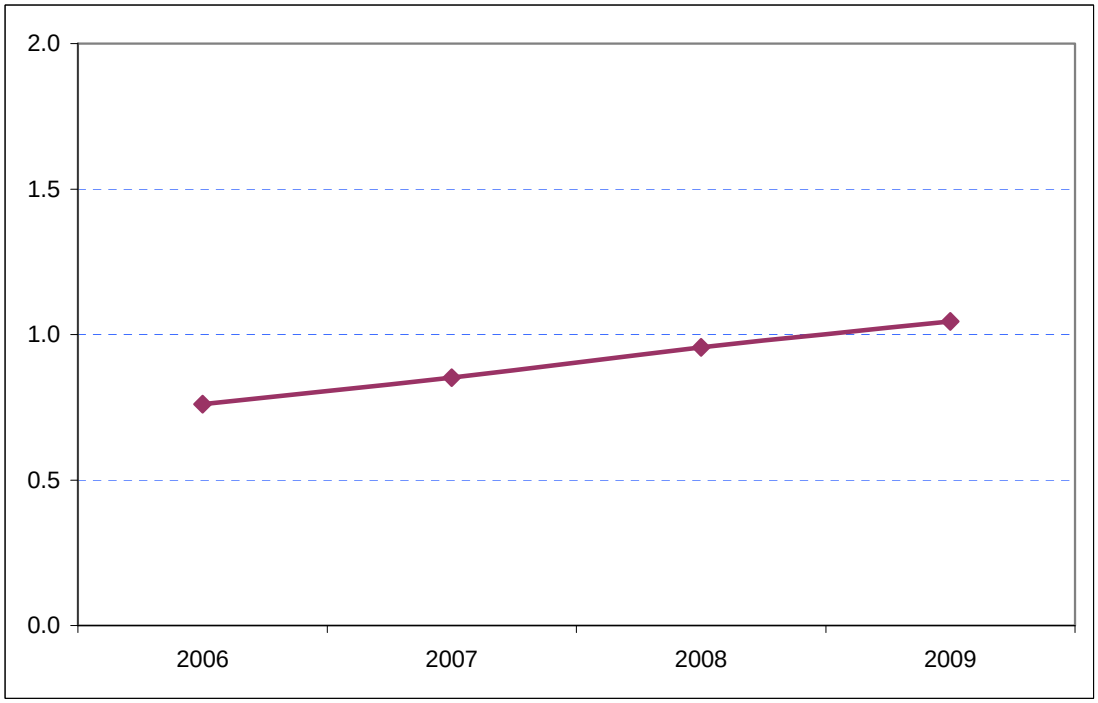
Figure 7.23: Estimates of total tourism expenditure in Lewisham including experimental estimates of day visitor spend (£ millions)



Sources: IPS, UKTS, BRES, LDA surveys and GLA Economics calculations

Figure 8.23 shows that Lewisham's share of total London tourism expenditure has also increased consistently over the period from 0.8 per cent in 2006 to over 1.0 per cent in 2009.

Figure 8.23: Lewisham's estimated share of total London tourism expenditure (%)

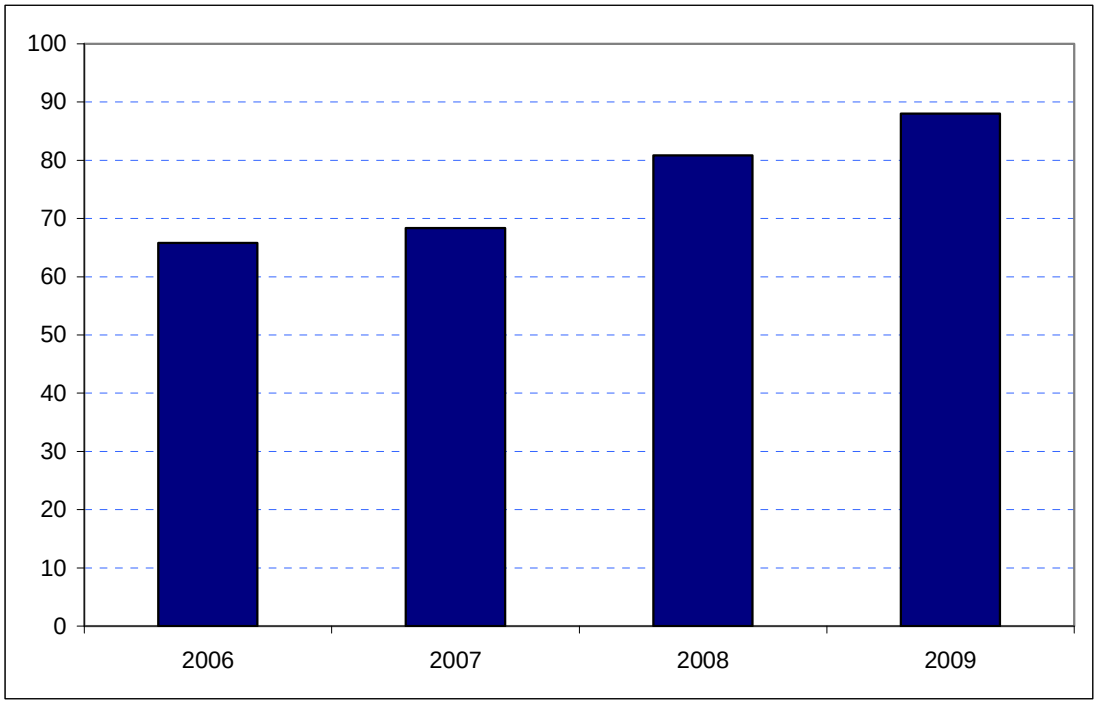


Sources: IPS, UKTS, BRES, LDA surveys and GLA Economics calculations

Merton
Borough Rank: 24

Estimates in Figure 5.24 show a strong increase in Merton's overseas visitor spend since 2006. Between 2006 and 2007 the increase was small: from £66 million to £68 million. Subsequently, increases have been greater: to £81 million in 2008 and £88 million in 2009.

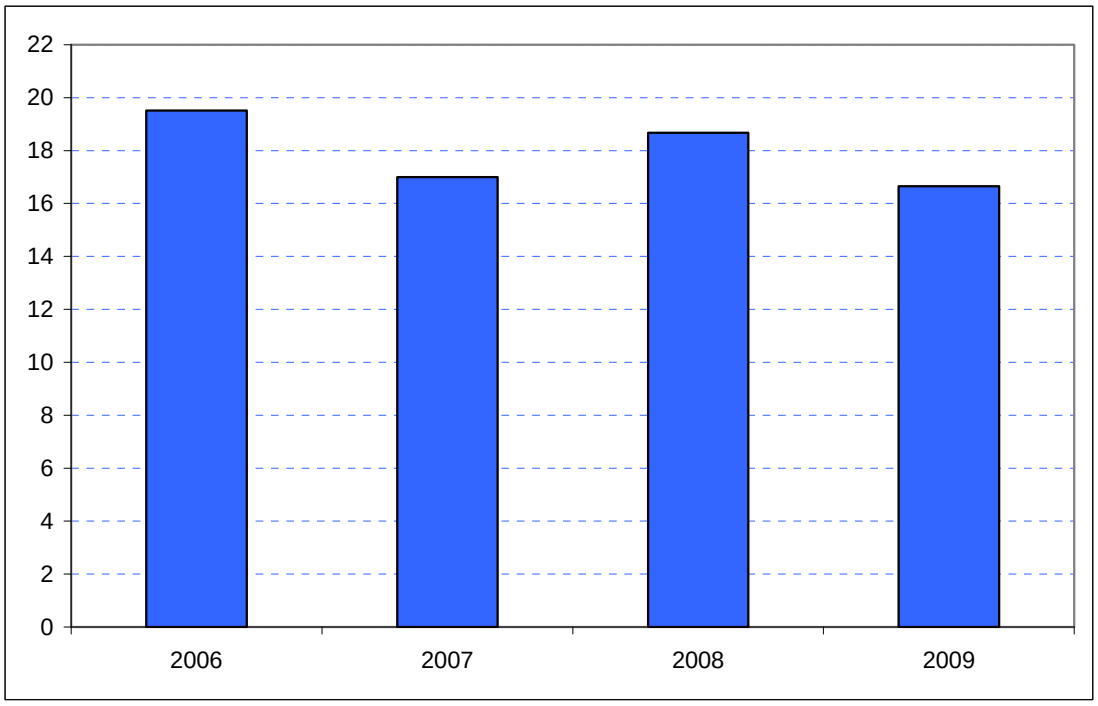
Figure 5.24: Overseas tourism expenditure in Merton (£ millions)



Sources: IPS, BRES, LDA surveys and GLA Economics calculations

There is a greater degree of volatility reflected in domestic overnight visitor spend in the Borough since 2006 as shown in Figure 6.24. In 2006 domestic overnight spend was estimated to be just under £20 million. This fell in 2007 to £17 million. For the two most recent years spend is estimated at £19 million (for 2008) and at £17 million (for 2009). In other words the estimate is back to where it was in 2007.

Figure 6.24: Domestic staying tourism expenditure in Merton (£ millions)



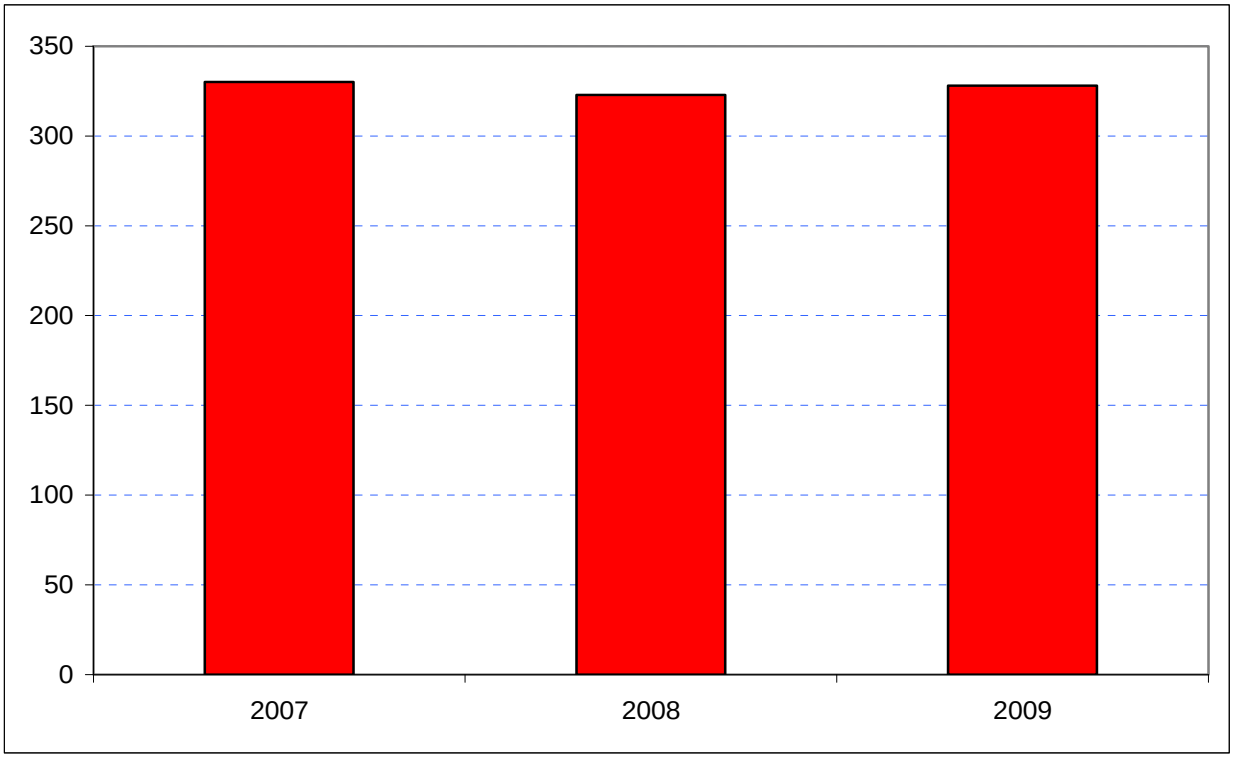
Sources: UKTS, BRES, LDA surveys and GLA Economics calculations

An experimental estimate of day visitor spend is provided in Tables 2a and 2b of Chapter 2. It should be emphasised that these are modelled estimates and further details of the data issues presented by day visitor tourism can be found in GLA Economics' Current Issues Note 29[30]. Details of the modelling and changes to it from previous LATI estimates can be found in the methodology section.

When the experimental day visitor estimates are included, Merton shows amongst the most stable set of results for the most recent three years: falling slightly from £331 million to £323 million between 2007 and 2008 before recovering in 2009 to £328 million as shown in Figure 7.24. Data for 2006 were excluded from the graphic as they would have introduced the additional problem of a change of survey basis for the day visitor estimates prior to 2007.

[30] http://www.london.gov.uk/publication/estimating-contribution-leisure-day-visitors-londons-tourism-industry
GLA Economics - Estimating the contribution of leisure day visitors to London's tourism industry (March 2011)

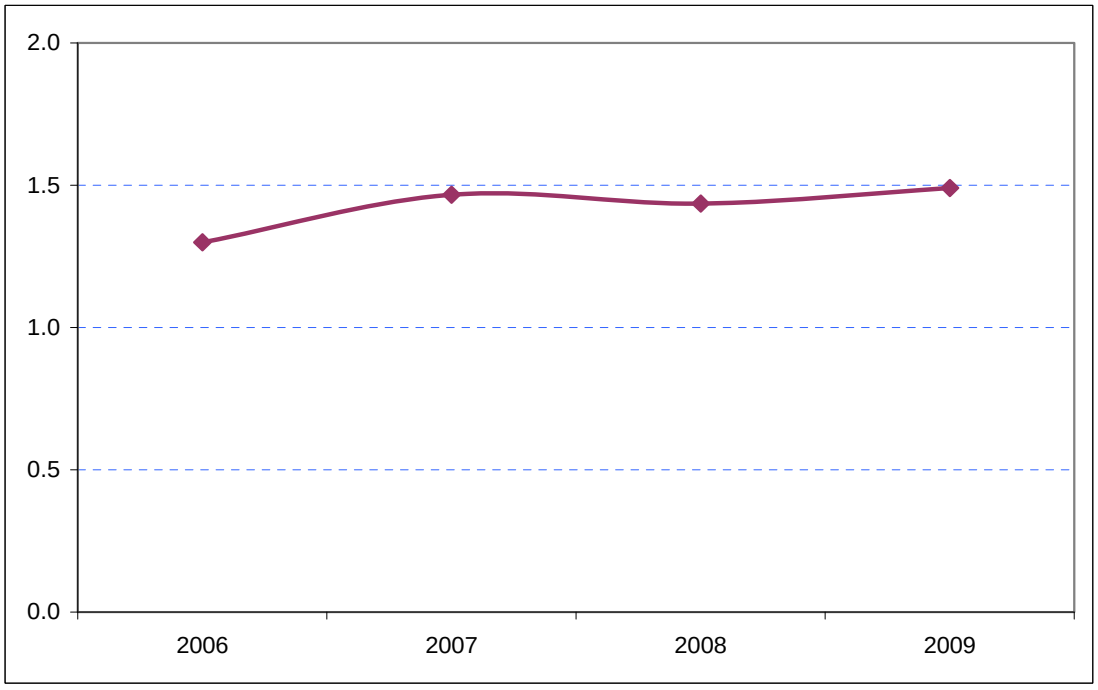
Figure 7.24: Estimates of total tourism expenditure in Merton including experimental estimates of day visitor spend (£ millions)



Sources: IPS, UKTS, BRES, LDA surveys and GLA Economics calculations

Figure 8.24 shows that Merton's share of total London tourism expenditure has also increased since 2006 when it accounted for 1.3 per cent. In 2009 it is estimated to have accounted for 1.5 per cent.

Figure 8.24: Merton's estimated share of total London tourism expenditure (%)

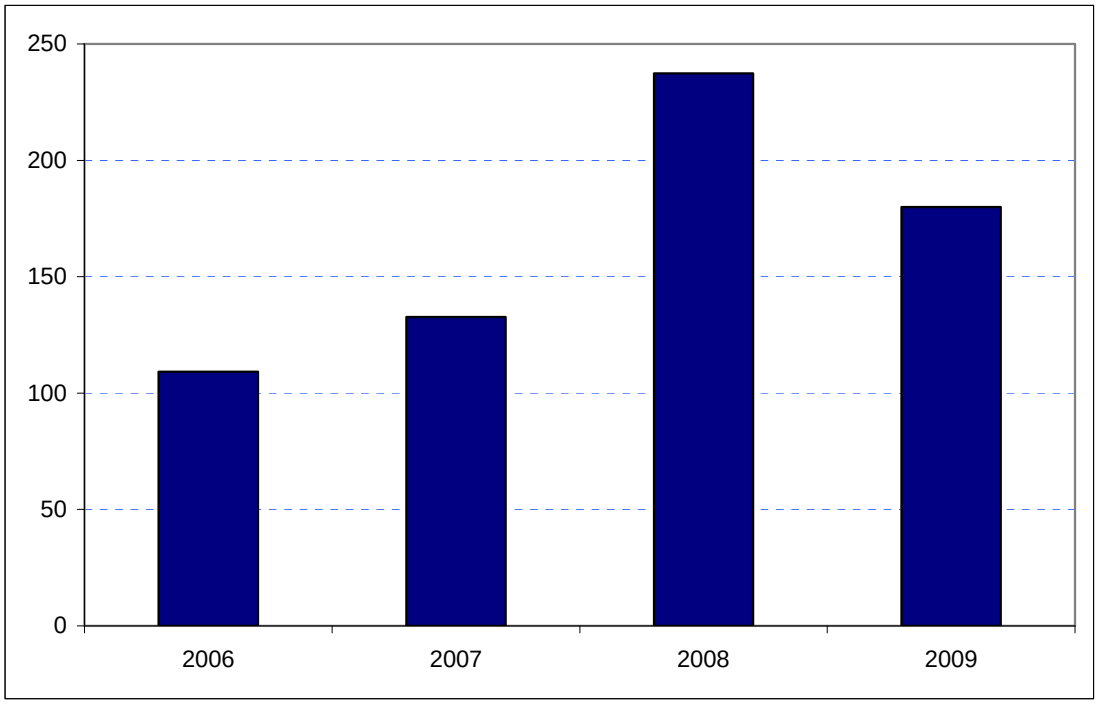


Sources: IPS, UKTS, BRES, LDA surveys and GLA Economics calculations

Newham
Borough Rank: 17

Estimates in Figure 5.25 show a very erratic pattern in Newham's overseas visitor spend since 2006 but with an overall increase in spend. Between 2006 and 2007 the increase was already substantial: from £109 million to £133 million. In 2008 there was a very marked increase to £237 million before a fall-off in 2009 to £180 million. These results, and the changes for Newham outlined later, are in large part due to a large increase in accommodation employment in Newham between 2007 and 2008 (and a subsequent fall in 2009).

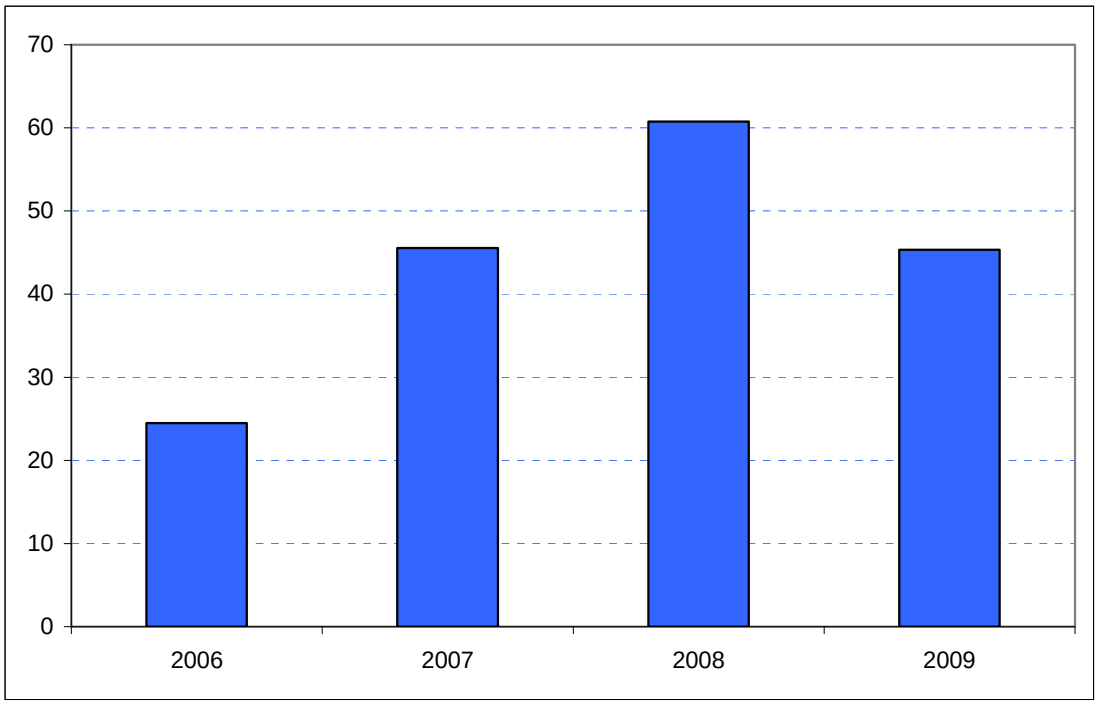
Figure 5.25: Overseas tourism expenditure in Newham (£ millions)



Sources: IPS, BRES, LDA surveys and GLA Economics calculations

The same general year-to-year pattern is exhibited in domestic overnight visitor spend in the Borough since 2006 as shown in Figure 6.25. Between 2006 and 2007 spend increased from under £25 million to £46 million. The strength of this increase in spend continued into 2008 with a further increase to £61 million. The estimate for 2009 shows spend has fallen back to £45 million.

Figure 6.25: Domestic staying tourism expenditure in Newham (£ millions)



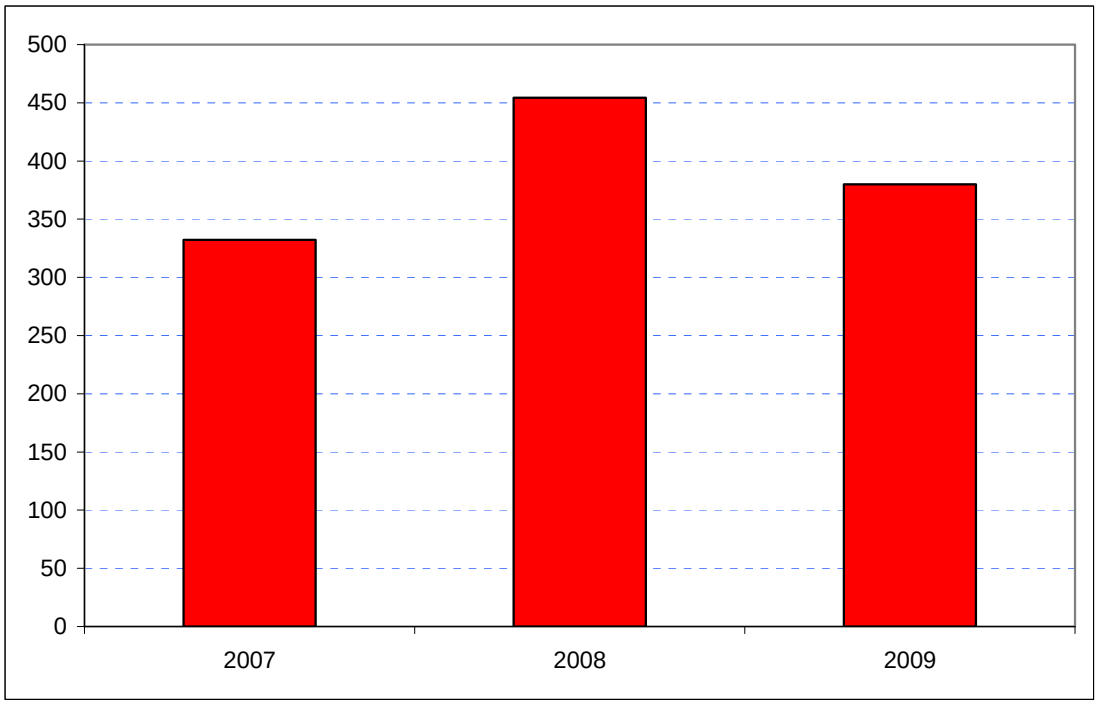
Sources: UKTS, BRES, LDA surveys and GLA Economics calculations

An experimental estimate of day visitor spend is provided in Tables 2a and 2b of Chapter 2. It should be emphasised that these are modelled estimates and further details of the data issues presented by day visitor tourism can be found in GLA Economics' Current Issues Note 29[31]. Details of the modelling and changes to it from previous LATI estimates can be found in the methodology section.

When the experimental day visitor estimates are included, the Borough shows an increase in visitor spend in 2008, rising from £333 million in 2007 to £454 million. In 2009 estimates suggest that total tourist spend fell back to £380 million as shown in Figure 7.25. Data for 2006 were excluded from the graphic as they would have introduced the additional problem of a change of survey basis for the day visitor estimates prior to 2007.

[31] http://www.london.gov.uk/publication/estimating-contribution-leisure-day-visitors-londons-tourism-industry
GLA Economics - Estimating the contribution of leisure day visitors to London's tourism industry (March 2011)

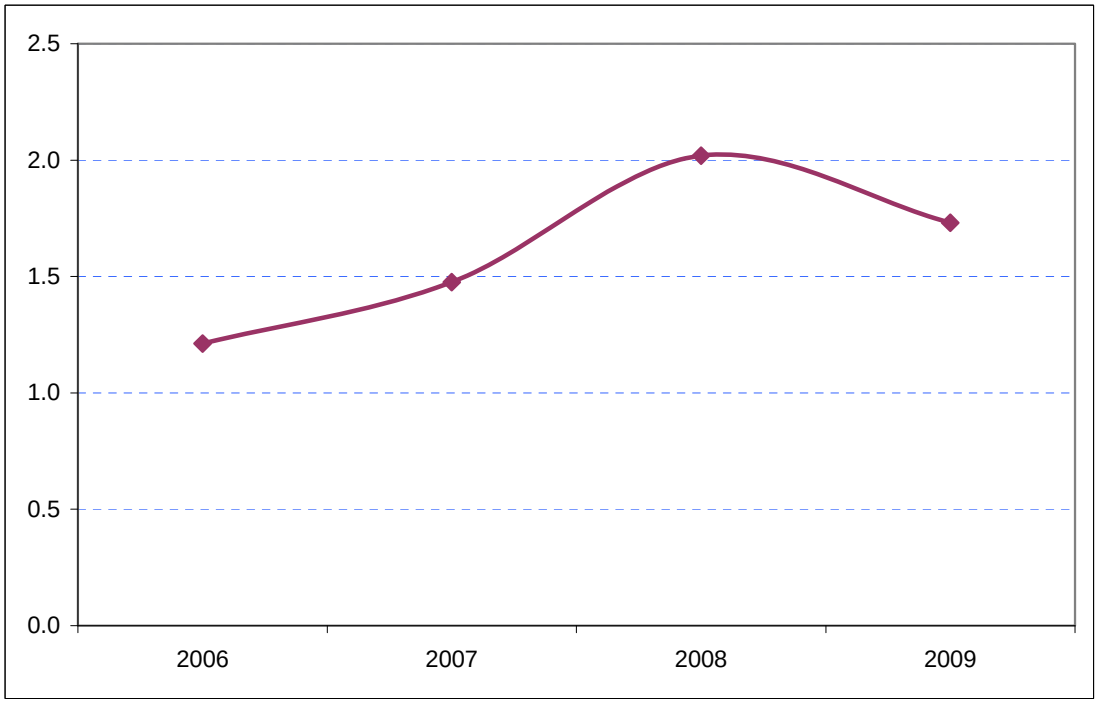
Figure 7.25: Estimates of total tourism expenditure in Newham including experimental estimates of day visitor spend (£ millions)



Sources: IPS, UKTS, BRES, LDA surveys and GLA Economics calculations

Figure 8.25 shows that Newham's share of total London tourism expenditure has increased since 2006 when it accounted for 1.2 per cent. In 2009 it is estimated to have accounted for 1.7 per cent although the share for 2008 actually exceeded 2.0 per cent.

Figure 8.25: Newham's estimated share of total London tourism expenditure (%)

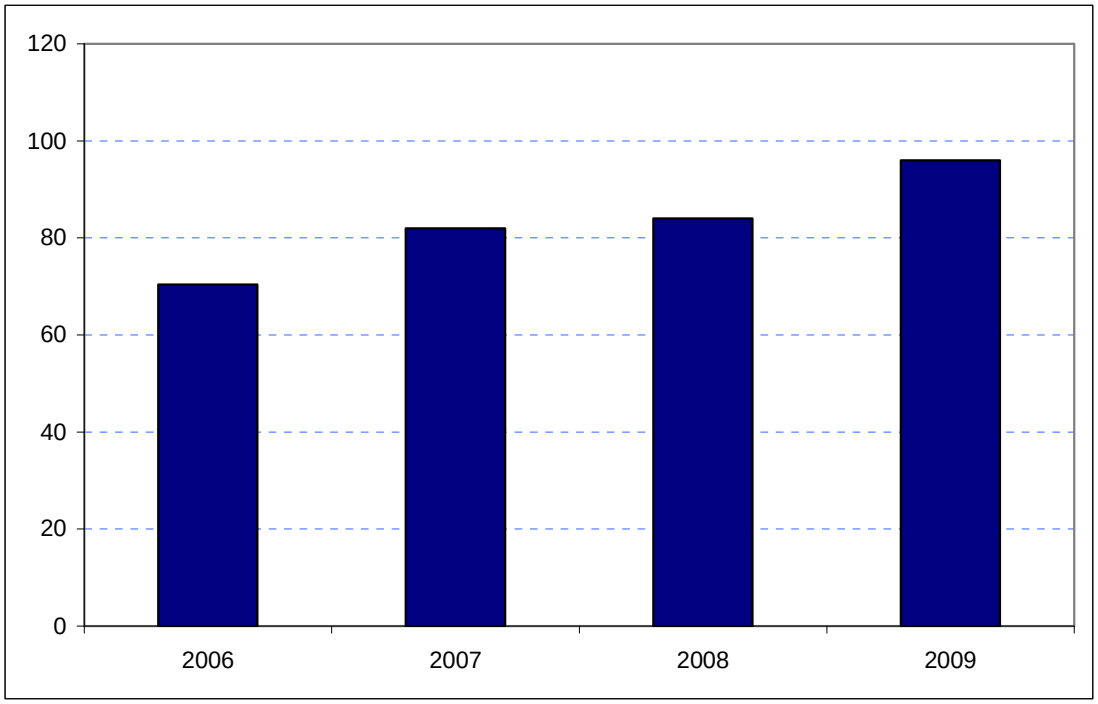


Sources: IPS, UKTS, BRES, LDA surveys and GLA Economics calculations

Redbridge
Borough Rank: 26

Estimates in Figure 5.26 show a generally increasing trend in Redbridge's overseas visitor spend since 2006. In 2006 spend was estimated at £70 million, rising to £82 million in 2007. 2008 was essentially flat with just a small increase to £84. The estimate for 2009 shows a greater increase to £96 million.

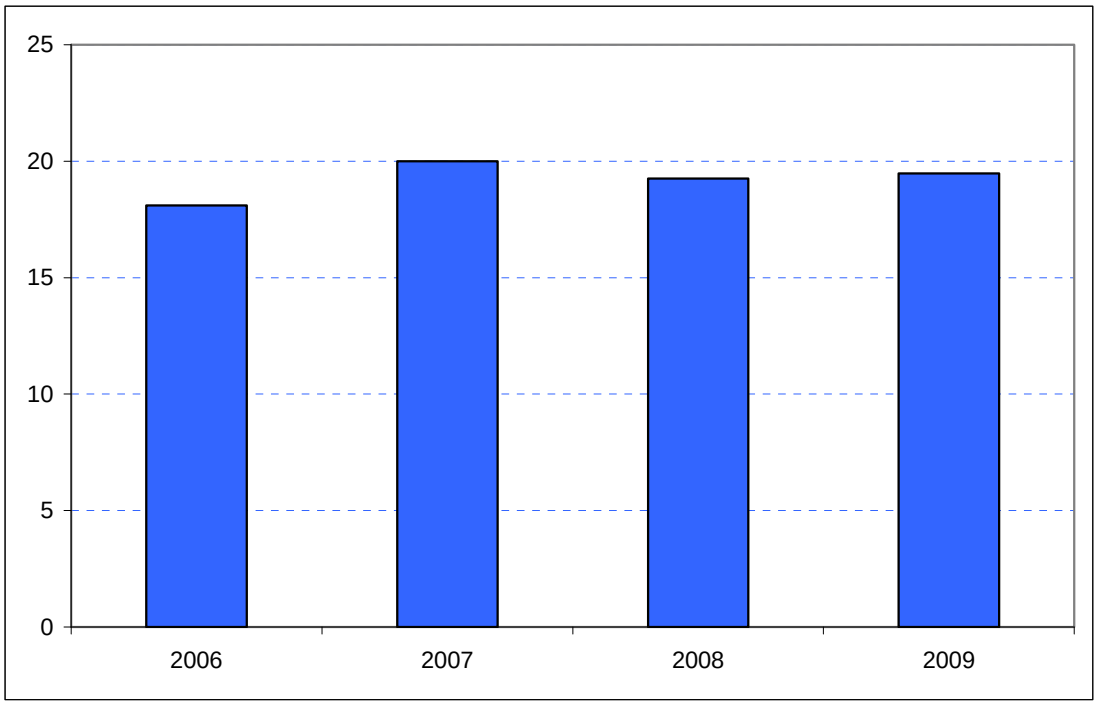
Figure 5.26: Overseas tourism expenditure in Redbridge (£ millions)



Sources: IPS, BRES, LDA surveys and GLA Economics calculations

Figure 6.26 shows that domestic overnight visitor spend was broadly consistent over the period, rising from £18 million in 2006 to a little more than £19 million in 2009 although having been marginally higher in 2007 at £20 million.

Figure 6.26: Domestic staying tourism expenditure in Redbridge (£ millions)



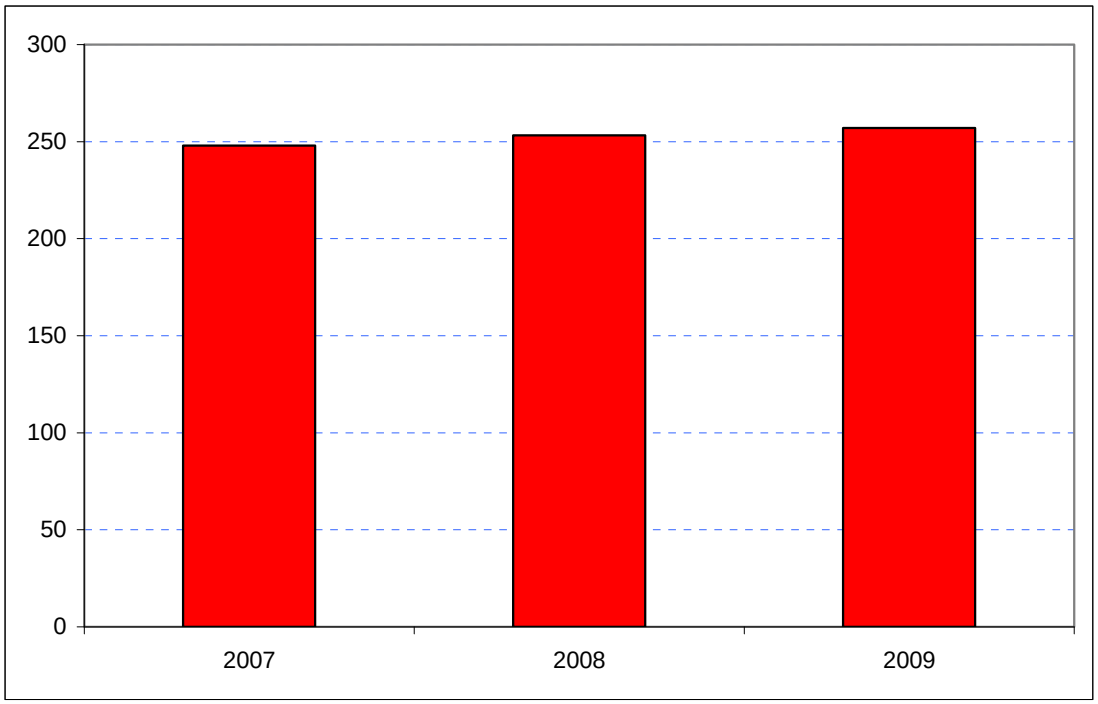
Sources: UKTS, BRES, LDA surveys and GLA Economics calculations

An experimental estimate of day visitor spend is provided in Tables 2a and 2b of Chapter 2. It should be emphasised that these are modelled estimates and further details of the data issues presented by day visitor tourism can be found in GLA Economics' Current Issues Note 29[32]. Details of the modelling and changes to it from previous LATI estimates can be found in the methodology section.

When the experimental day visitor estimates are included, the consistency of day visitor spend with its slight downward trend counteracts the trend in overseas visitor spend to drive one of the most stable of Borough total spends. Total spend in 2007 was estimated to have been £249 million. This increased to £253 million in 2008 and to £257 million in 2009. However, the picture is broadly one of stability as shown in Figure 7.26. Data for 2006 were excluded from the graphic as they would have introduced the additional problem of a change of survey basis for the day visitor estimates prior to 2007.

[32] http://www.london.gov.uk/publication/estimating-contribution-leisure-day-visitors-londons-tourism-industry
GLA Economics - Estimating the contribution of leisure day visitors to London's tourism industry (March 2011)

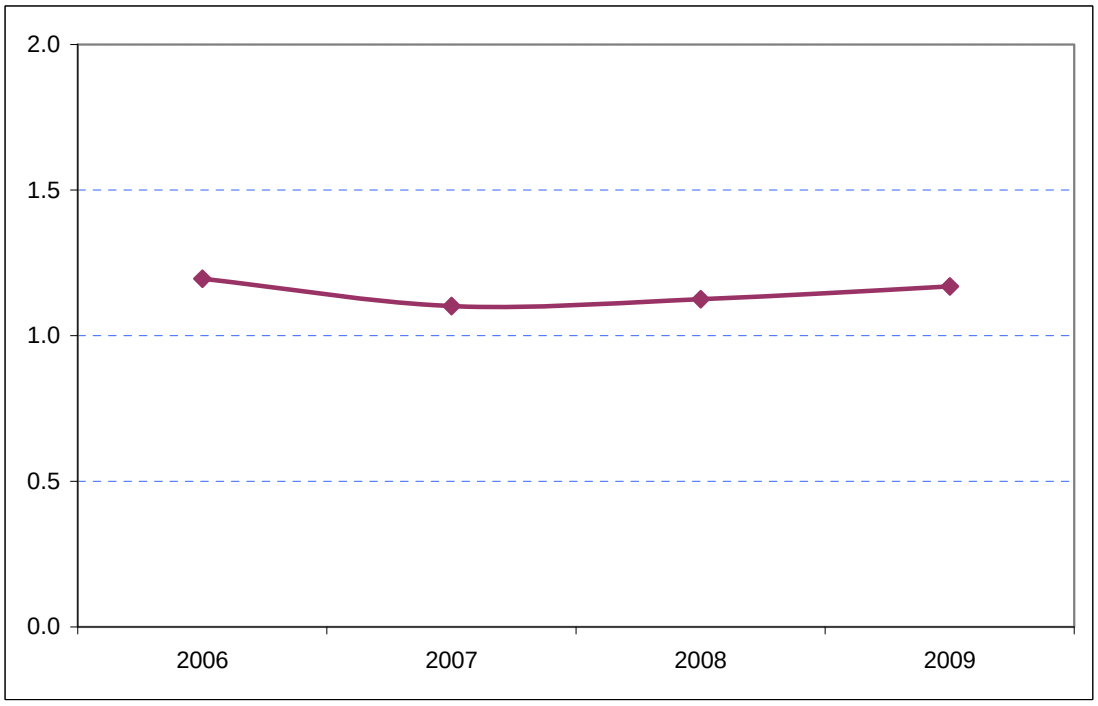
Figure 7.26: Estimates of total tourism expenditure in Redbridge including experimental estimates of day visitor spend (£ millions)



Sources: IPS, UKTS, BRES, LDA surveys and GLA Economics calculations

Figure 8.26 shows that Redbridge's share of total London tourism expenditure has only fluctuated slightly between 1.1 and 1.2 per cent over the period.

Figure 8.26: Redbridge's estimated share of total London tourism expenditure (%)

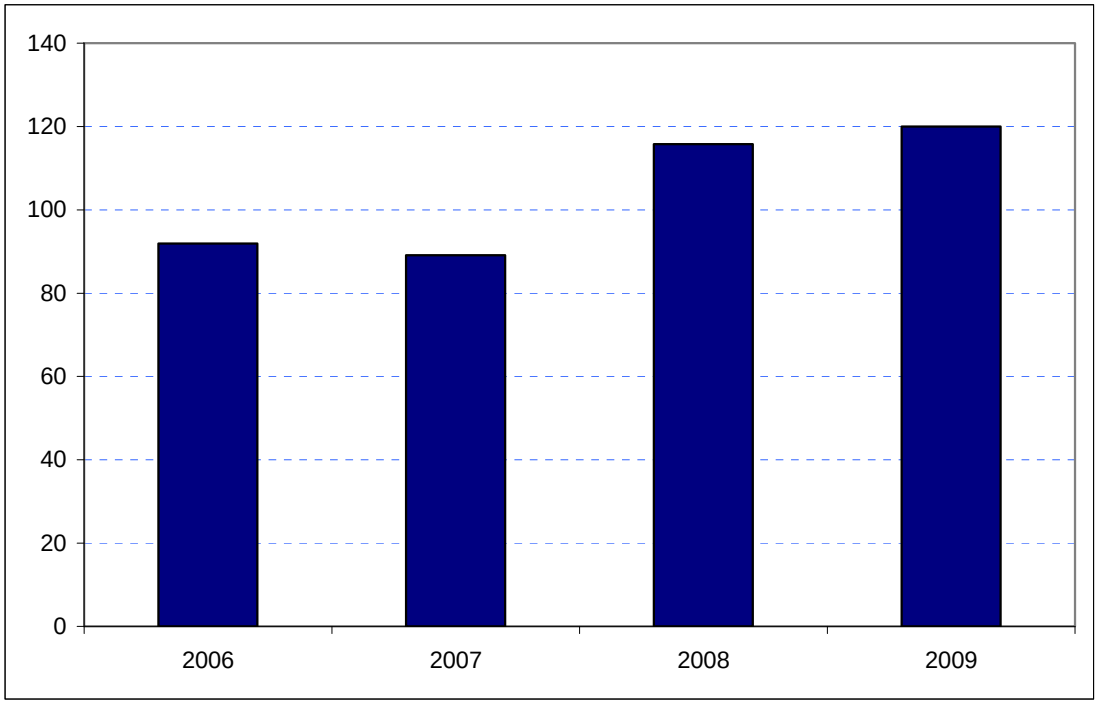


Sources: IPS, UKTS, BRES, LDA surveys and GLA Economics calculations

Richmond-upon-Thames
Borough Rank: 13

Richmond presents one of the most unexpected Borough pictures from the LATI model with a dramatic step change in spend between 2007 and 2008 reflected driven mainly by changes in day visitor spend (which is likely to be influenced largely by the experimental nature of these statistics). Estimates in Figure 5.27 show an increase in the level of Richmond's overseas visitor spend since 2007. Between 2006 and 2007 there was a small decline in spend from £92 million to £89 million. Spend then jumped to nearly £116 million. The figure for 2009 is a slight increase on that again at £120 million.

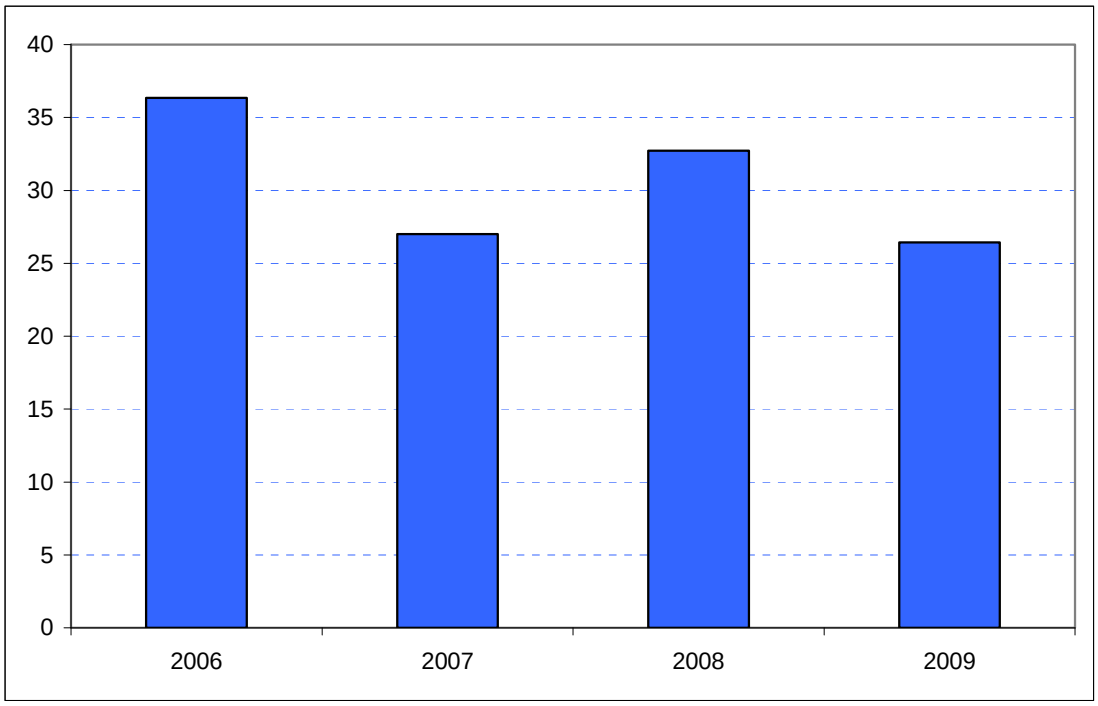
Figure 5.27: Overseas tourism expenditure in Richmond (£ millions)



Sources: IPS, BRES, LDA surveys and GLA Economics calculations

Figure 6.27 shows that domestic overnight visitor spend does not reflect the trend seen in the other visitor types. Instead it shows a rather volatile series commencing at £36 million spend in 2006. This fell to £27 million in 2007, increased back to £33 million in 2008 before falling back to £26 million again in 2009.

Figure 6.27: Domestic staying tourism expenditure in Richmond (£ millions)



Sources: UKTS, BRES, LDA surveys and GLA Economics calculations

An experimental estimate of day visitor spend is provided in Tables 2a and 2b of Chapter 2. It should be emphasised that these are modelled estimates and further details of the data issues presented by day visitor tourism can be found in GLA Economics' Current Issues Note 29[33]. Details of the modelling and changes to it from previous LATI estimates can be found in the methodology section.

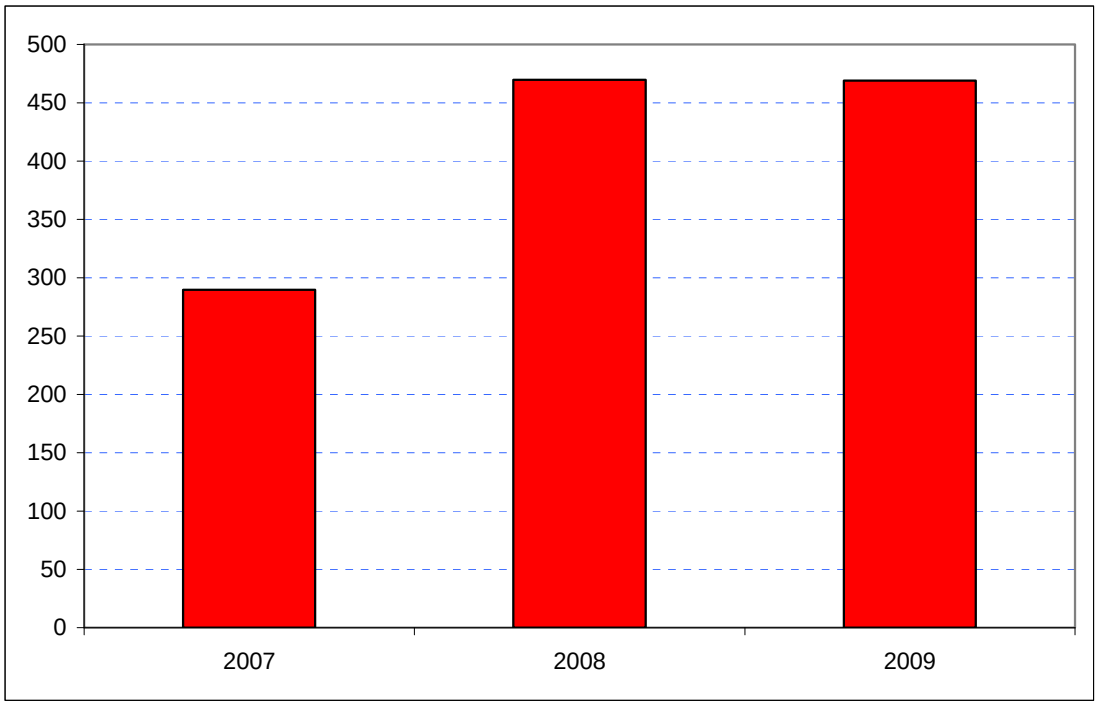
When the experimental day visitor estimates are included, a large increase in day visitor spend between 2007 and 2008 (likely to be driven largely by the lack of robustness in some of the underlying data – principally in this instance the 'London Visitor Survey[34]) drives a similarly large increase in total tourist expenditure from £292 million in 2007 to £470 million in 2008 as shown in Figure 7.27.

There is little change beyond this for the 2009 estimate (£469 million). Data for 2006 were excluded from the graphic as they would have introduced the additional problem of a change of survey basis for the day visitor estimates prior to 2007.

[33] http://www.london.gov.uk/publication/estimating-contribution-leisure-day-visitors-londons-tourism-industry
GLA Economics - Estimating the contribution of leisure day visitors to London's tourism industry (March 2011)

[34] This big rise is the result of small changes in components sourced to the London Visitor Survey (LVS). Whilst GLA Economics believes that this is likely to be an overestimate, it may also be the case that day visitor expenditure in the Borough in previous LATI estimates has been underestimated.

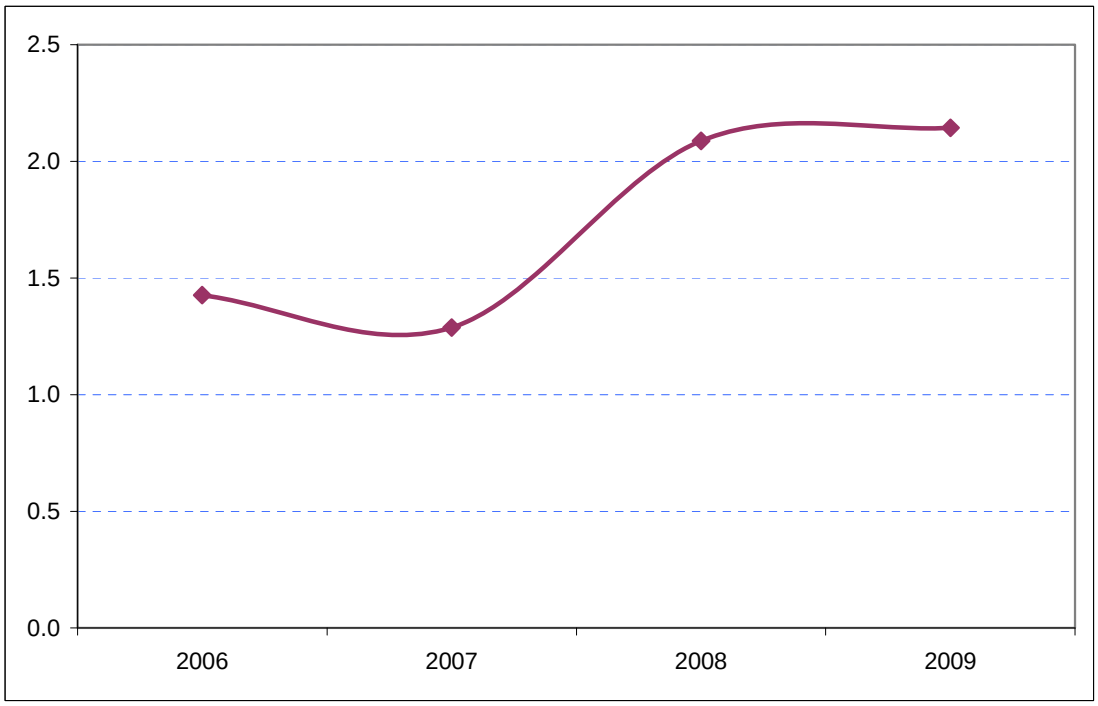
Figure 7.27: Estimates of total tourism expenditure in Richmond including experimental estimates of day visitor spend (£ millions)



Sources: IPS, UKTS, BRES, LDA surveys and GLA Economics calculations

With this size of step change in results, it is not surprising to see in Figure 8.27 that Richmond's share of total London tourism expenditure also jumps in 2008 from 1.3 per cent in 2007 to 2.1 per cent. For 2009 it is broadly steady.

Figure 8.27: Richmond's estimated share of total London tourism expenditure (%)

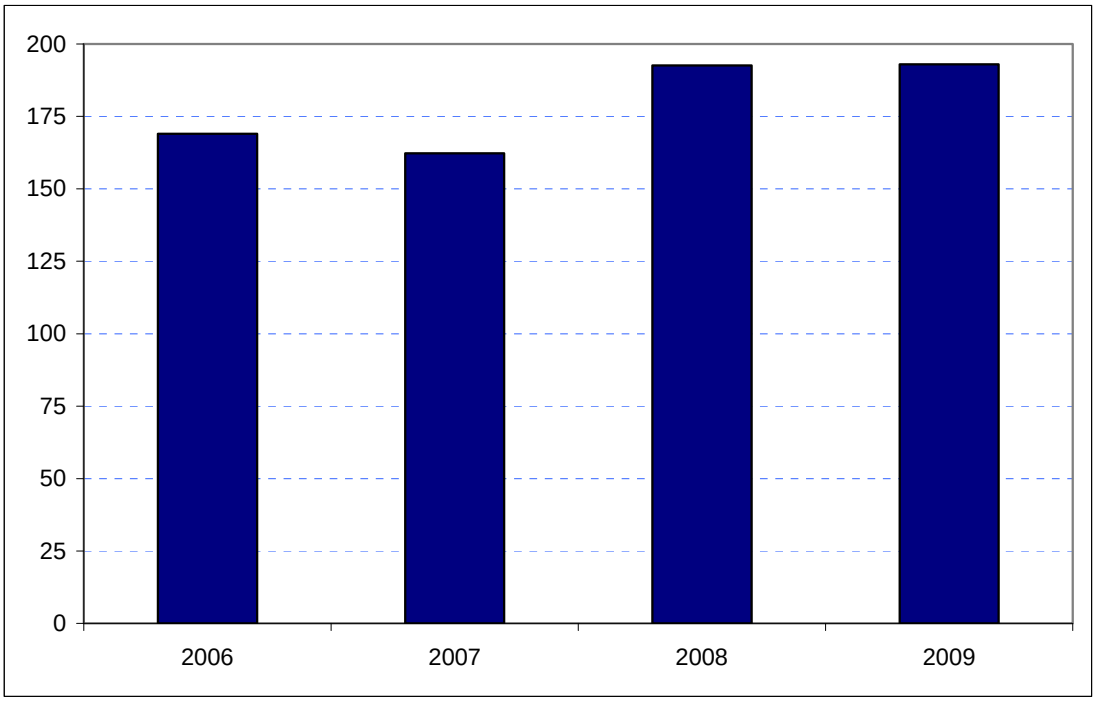


Sources: IPS, UKTS, BRES, LDA surveys and GLA Economics calculations

Southwark
Borough Rank: 4

Estimates included in Figure 5.28 show an increase in Southwark's overseas visitor spend since 2007. Between 2006 and 2007 there was a small decline in spend from £169 million to £162 million. Spend that jumped to £193 million in 2008 and was stable in 2009.

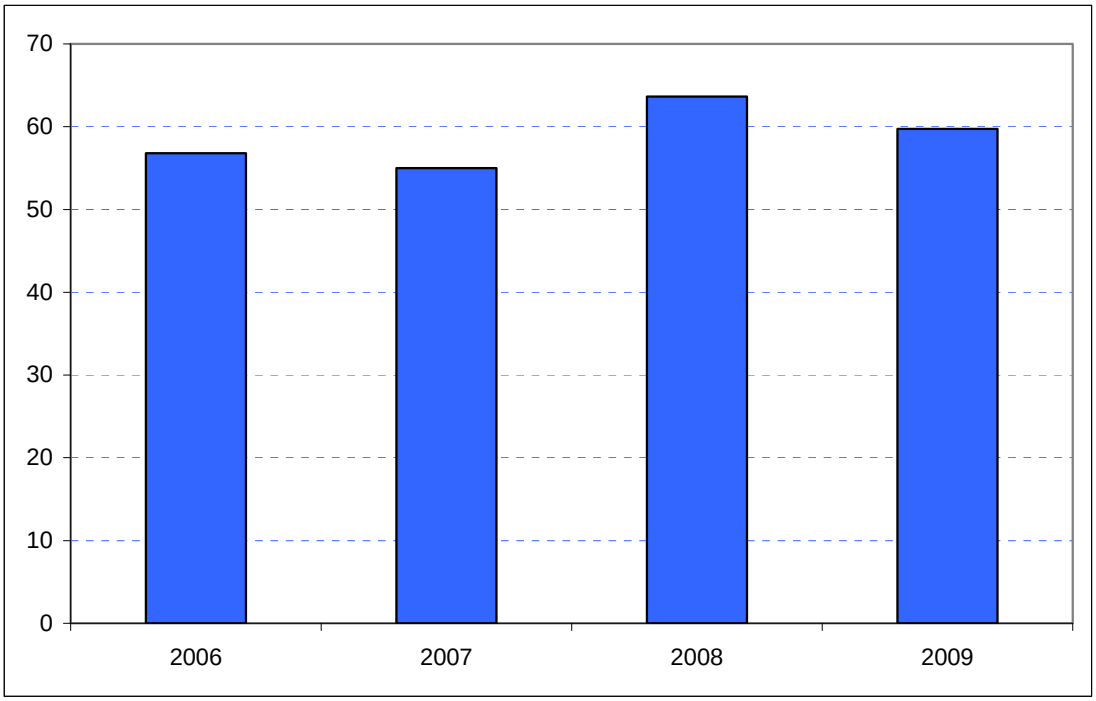
Figure 5.28: Overseas tourism expenditure in Southwark (£ millions)



Sources: IPS, BRES, LDA surveys and GLA Economics calculations

Figure 6.28 shows that domestic overnight visitor spend also exhibited a decline between 2006 and 2007 from £57 million to £55 million. In 2008 this increased to £64 million before falling to £60 million in 2009.

Figure 6.28: Domestic staying tourism expenditure in Southwark (£ millions)



Sources: UKTS, BRES, LDA surveys and GLA Economics calculations

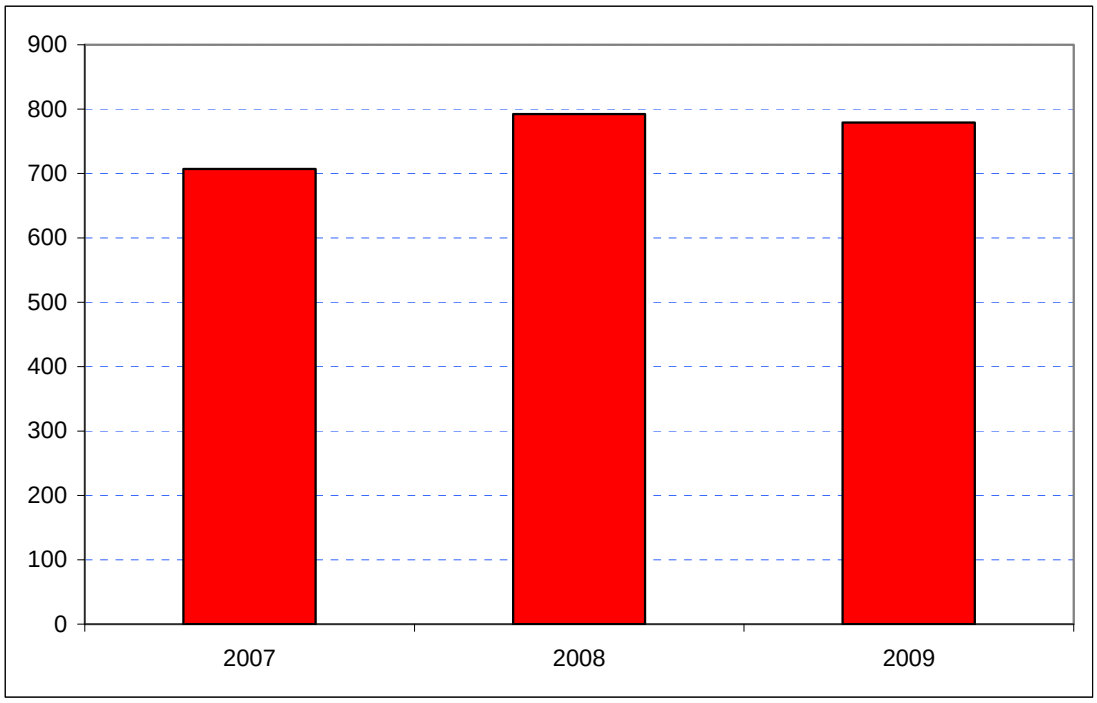
An experimental estimate of day visitor spend is provided in Tables 2a and 2b of Chapter 2. It should be emphasised that these are modelled estimates and further details of the data issues presented by day visitor tourism can be found in GLA Economics' Current Issues Note 29[35]. Details of the modelling and changes to it from previous LATI estimates can be found in the methodology section.

When the experimental day visitor estimates are included, there is a sizeable increase in spend between 2007 and 2008 as shown in Figure 7.28. It does need to be kept in mind that 2007 seems to have been the Borough's weakest year and that data for 2006 were excluded from the graphic as they would have introduced the additional problem of a change of survey basis for the day visitor estimates prior to 2007.

Between 2007 and 2008, total tourist expenditure is estimated to have increased from £707 million to £793 million. In 2009, spend fell back to £779 million.

[35] http://www.london.gov.uk/publication/estimating-contribution-leisure-day-visitors-londons-tourism-industry
GLA Economics - Estimating the contribution of leisure day visitors to London's tourism industry (March 2011)

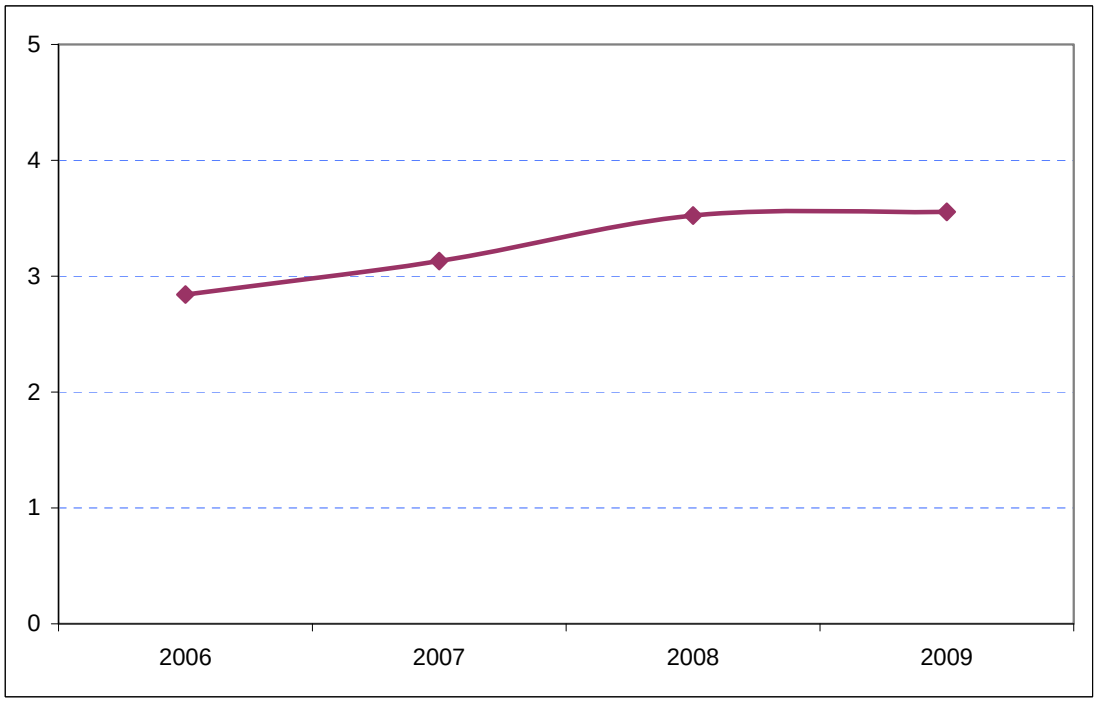
Figure 7.28: Estimates of total tourism expenditure in Southwark including experimental estimates of day visitor spend (£ millions)



Sources: IPS, UKTS, BRES, LDA surveys and GLA Economics calculations

Figure 8.28 demonstrates that Southwark has increased its share of the capital's total tourism expenditure from 2.8 per cent in 2006 to nearly 3.6 per cent in 2009.

Figure 8.28: Southwark's estimated share of total London tourism expenditure (%)

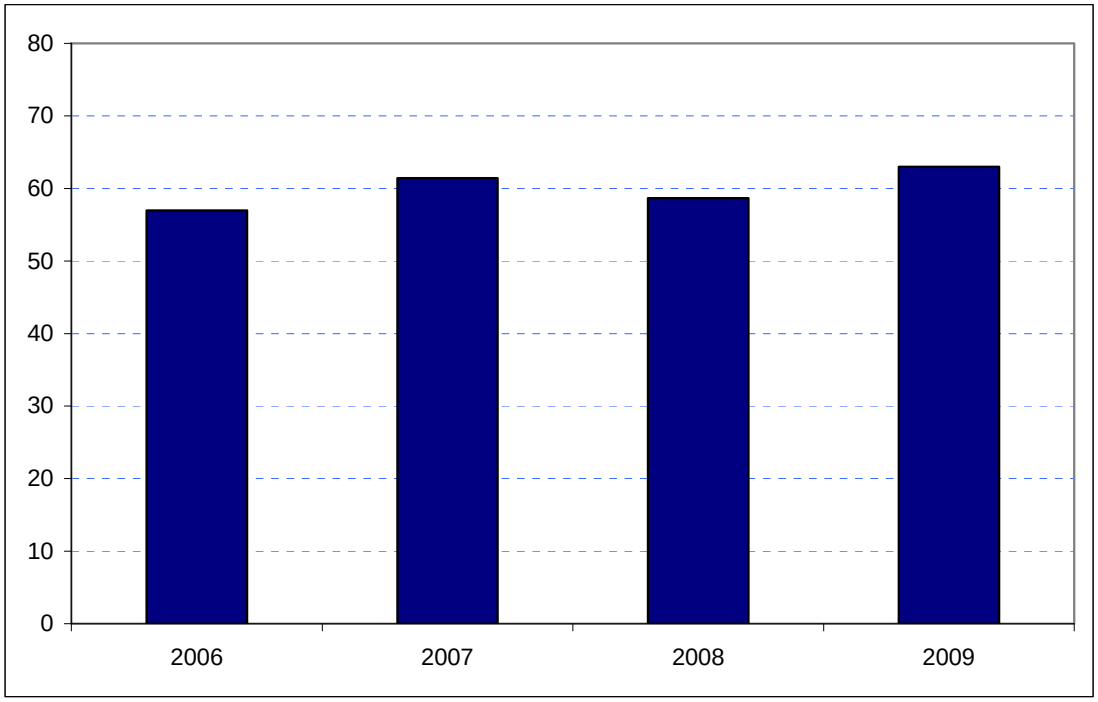


Sources: IPS, UKTS, BRES, LDA surveys and GLA Economics calculations

Sutton
Borough Rank: 32

Estimates in Figure 5.29 show a slightly increasing trend in Sutton's overseas visitor spend since 2006 although the changes from year to year have been small – both in relative and actual terms. In 2006 overseas spend was estimated to be £57 million, rising to £61 million in 2007. This fell back to £59 million in 2008 before increasing to £63 million in 2009.

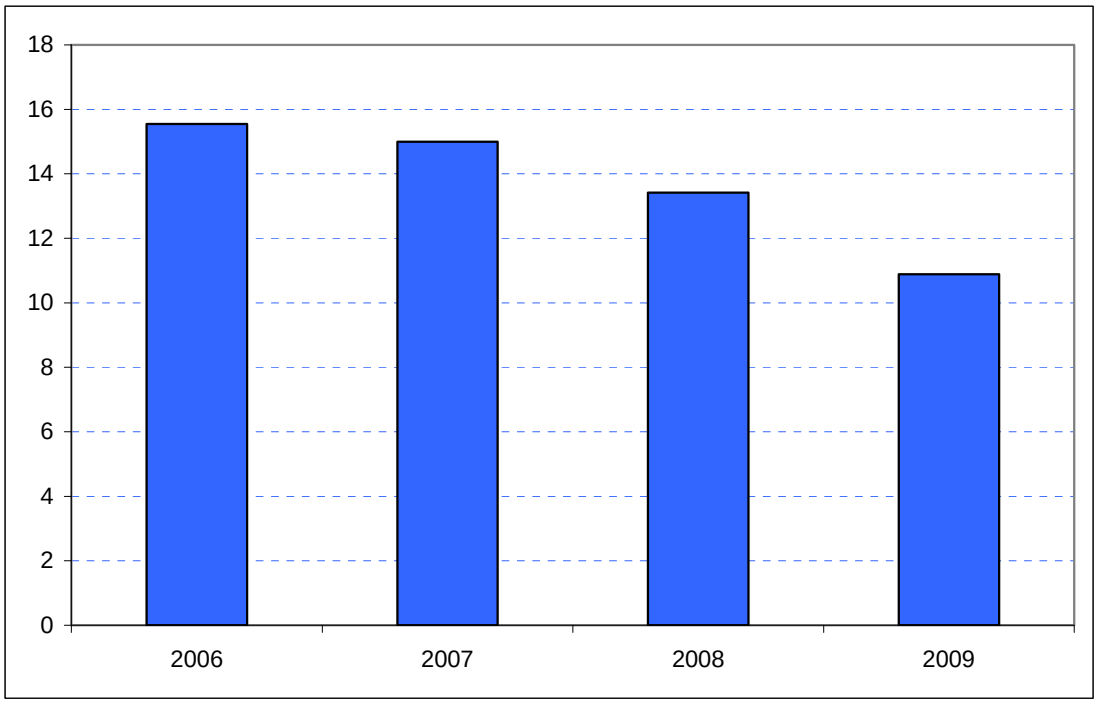
Figure 5.29: Overseas tourism expenditure in Sutton (£ millions)



Sources: IPS, BRES, LDA surveys and GLA Economics calculations

Domestic overnight visitor spend shows a clearer trend of falls as shown in Figure 6.29 commencing with a drop from £16 million to £15 million between 2006 and 2007. The decline slowed in 2008 with spend dropping to £13 million. However, the fall between 2008 and 2009 was especially marked falling (in rounded terms) from £13 million to £11 million but actually dropping by 19 per cent.

Figure 6.29: Domestic staying tourism expenditure in Sutton (£ millions)



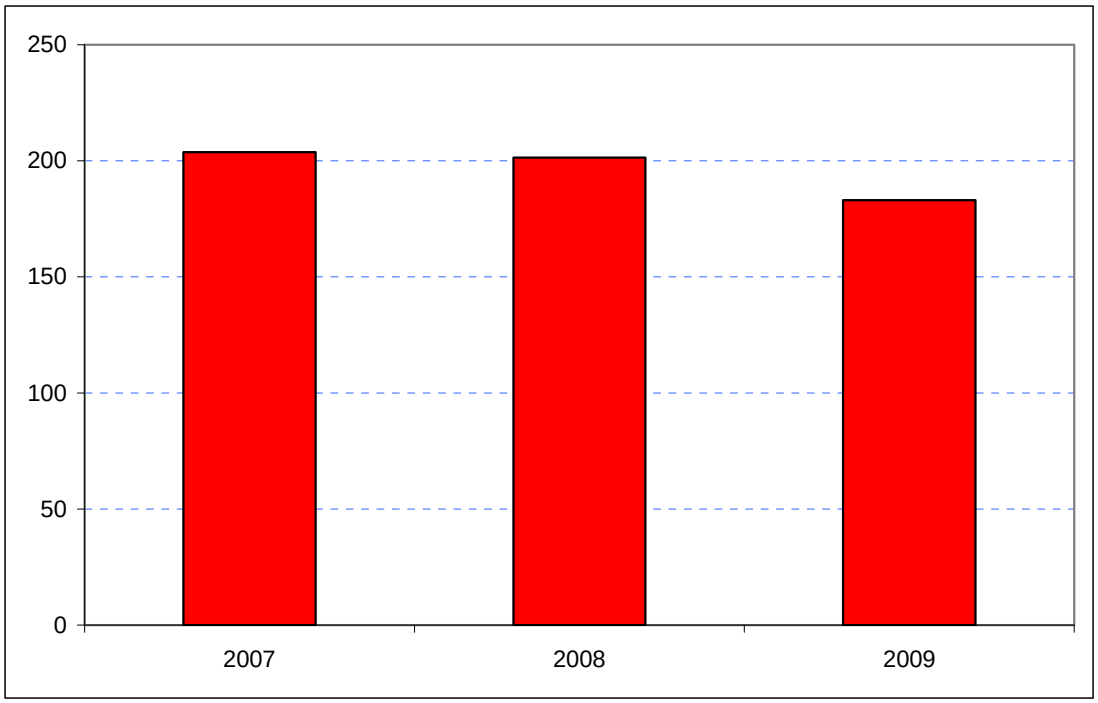
Sources: UKTS, BRES, LDA surveys and GLA Economics calculations

An experimental estimate of day visitor spend is provided in Tables 2a and 2b of Chapter 2. It should be emphasised that these are modelled estimates and further details of the data issues presented by day visitor tourism can be found in GLA Economics' Current Issues Note 29[36]. Details of the modelling and changes to it from previous LATI estimates can be found in the methodology section.

When the experimental day visitor estimates are included, Sutton shows a small decline in total spend between 2007 and 2008 from £205 million to £201 million. However, this was followed by a sharper fall in 2009 to £183 million as shown in Figure 7.29.

[36] http://www.london.gov.uk/publication/estimating-contribution-leisure-day-visitors-londons-tourism-industry
GLA Economics - Estimating the contribution of leisure day visitors to London's tourism industry (March 2011)

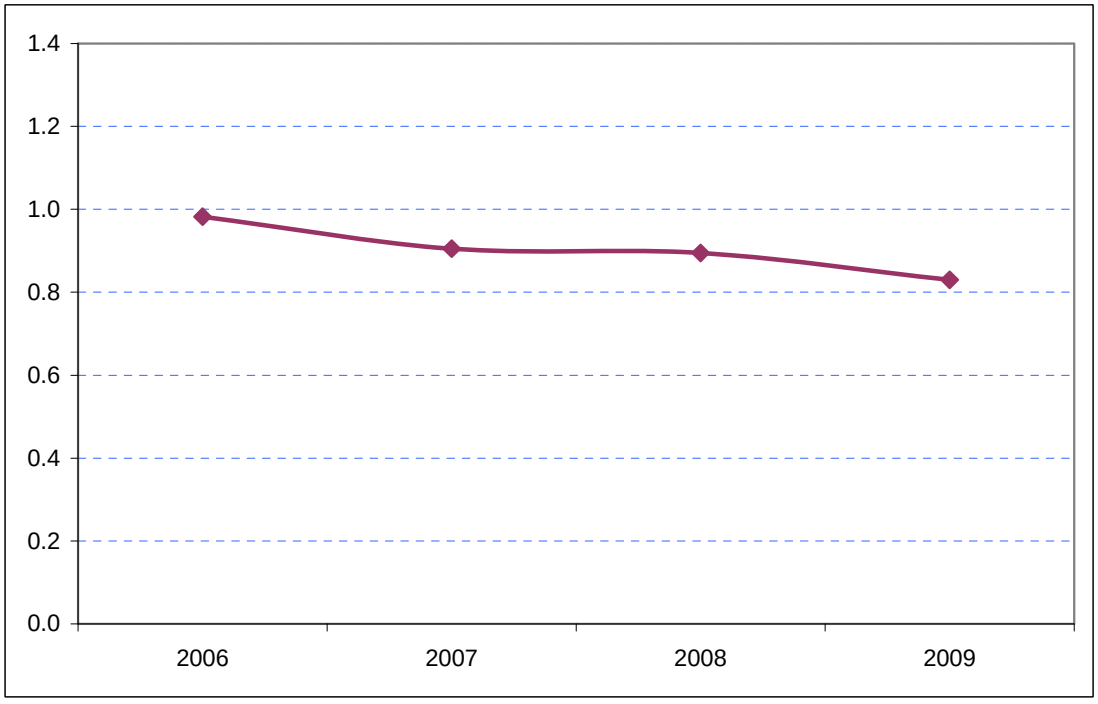
Figure 7.29: Estimates of total tourism expenditure in Sutton including experimental estimates of day visitor spend (£ millions)



Sources: IPS, UKTS, BRES, LDA surveys and GLA Economics calculations

Figures 8.29 shows that Sutton's share of total London tourism expenditure has also declined from 1.0 per cent in 2006 to just over 0.8 per cent in 2009.

Figure 8.29: Sutton's estimated share of total London tourism expenditure (%)

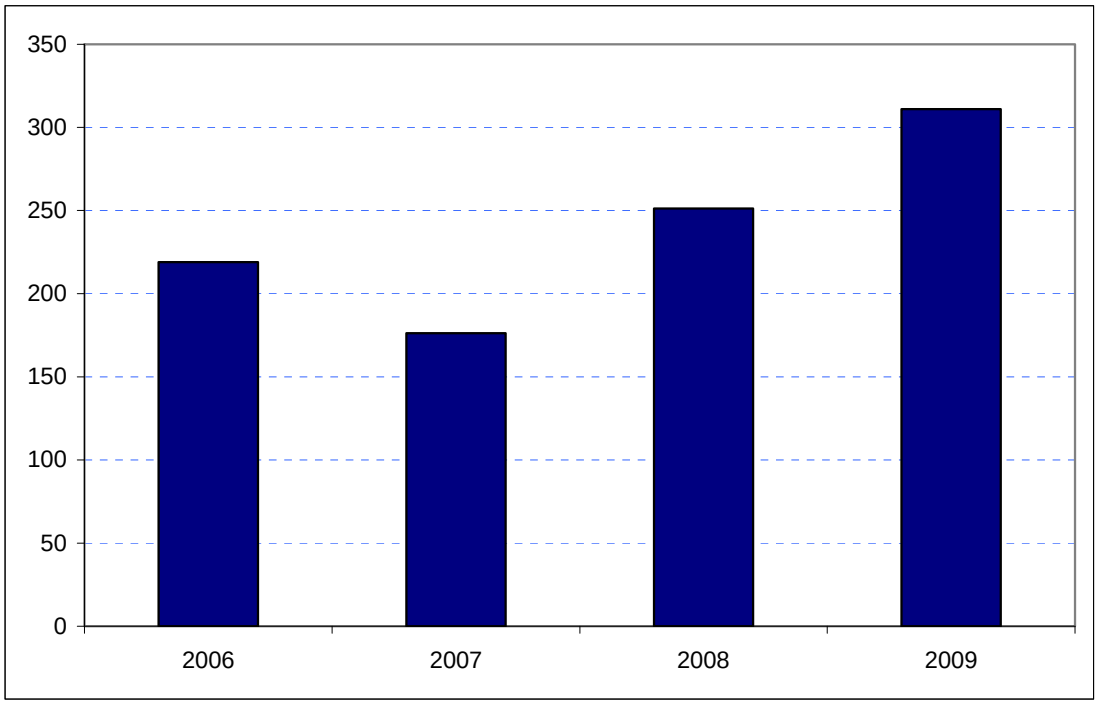


Sources: IPS, UKTS, BRES, LDA surveys and GLA Economics calculations

Tower Hamlets
Borough Rank: 5

The estimates in Figure 5.30 show a strong recent trend in Tower Hamlets' overseas visitor spend. The period from 2006 to 2007 actually saw a decline from £219 million to £176 million. In 2008 this recovered to £251 million and has since risen to £311 million.

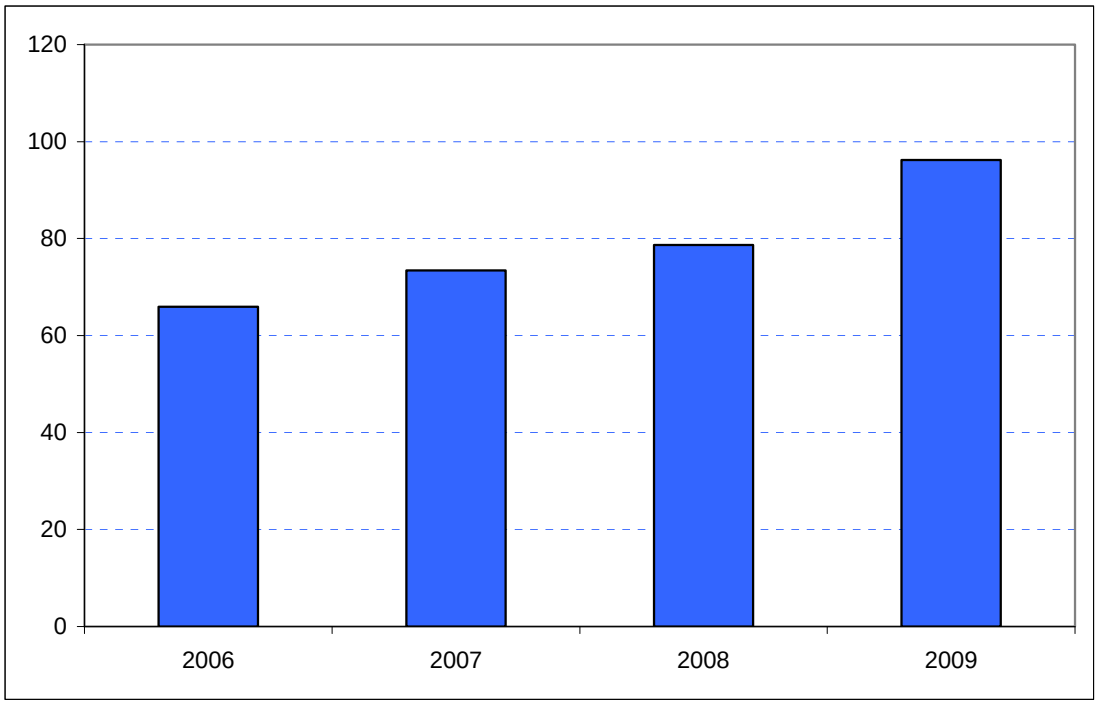
Figure 5.30: Overseas tourism expenditure in Tower Hamlets (£ millions)



Sources: IPS, BRES, LDA surveys and GLA Economics calculations

Domestic overnight visitor spend shows an even clearer trend of growth as demonstrated in Figure 6.30. In 2006 domestic overnight visitor spend was estimated to have been £66 million. That increased to £76 million in 2007 and £79 million in 2008 followed by a steeper increase to £96 million in 2009.

Figure 6.30: Domestic staying tourism expenditure in Tower Hamlets (£ millions)



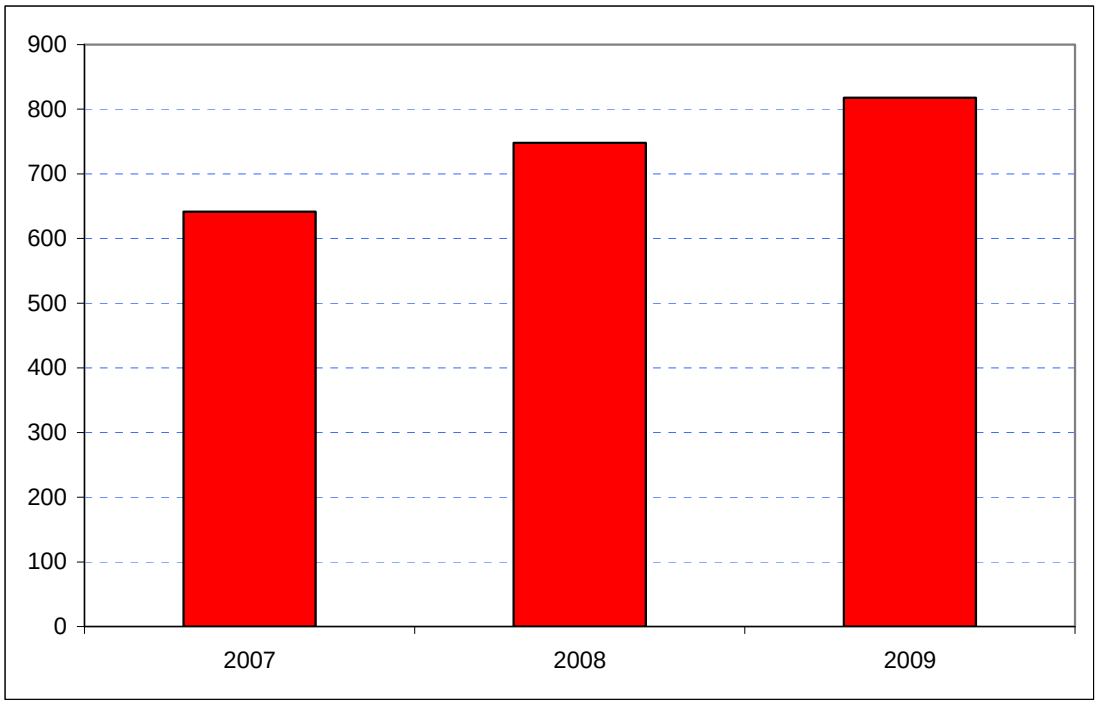
Sources: UKTS, BRES, LDA surveys and GLA Economics calculations

An experimental estimate of day visitor spend is provided in Tables 2a and 2b of Chapter 2. It should be emphasised that these are modelled estimates and further details of the data issues presented by day visitor tourism can be found in GLA Economics' Current Issues Note 29[37]. Details of the modelling and changes to it from previous LATI estimates can be found in the methodology section.

Day visitor spend estimates added to the uplift in 2008 but actually showed a slight decline in 2009. Overall total estimated tourism expenditure rose from £644 million in 2007 to £748 million in 2008 and to £818 million in 2009 as shown in Figure 7.30.

[37] http://www.london.gov.uk/publication/estimating-contribution-leisure-day-visitors-londons-tourism-industry
GLA Economics - Estimating the contribution of leisure day visitors to London's tourism industry (March 2011)

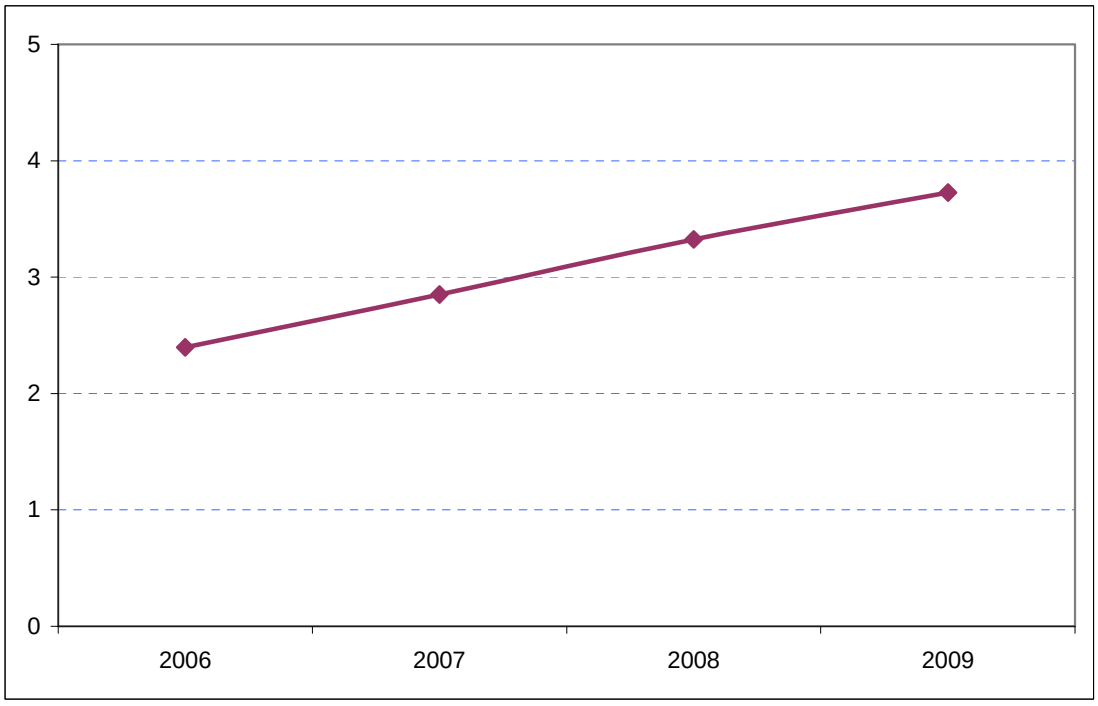
Figure 7.30: Estimates of total tourism expenditure in Tower Hamlets including experimental estimates of day visitor spend (£ millions)



Sources: IPS, UKTS, BRES, LDA surveys and GLA Economics calculations

Figure 8.30 shows that Tower Hamlets' share of total London tourism expenditure has also increased steadily from 2.4 per cent back in 2006 to 3.7 per cent in 2009.

Figure 8.30: Tower Hamlets' estimated share of total London tourism expenditure (%)

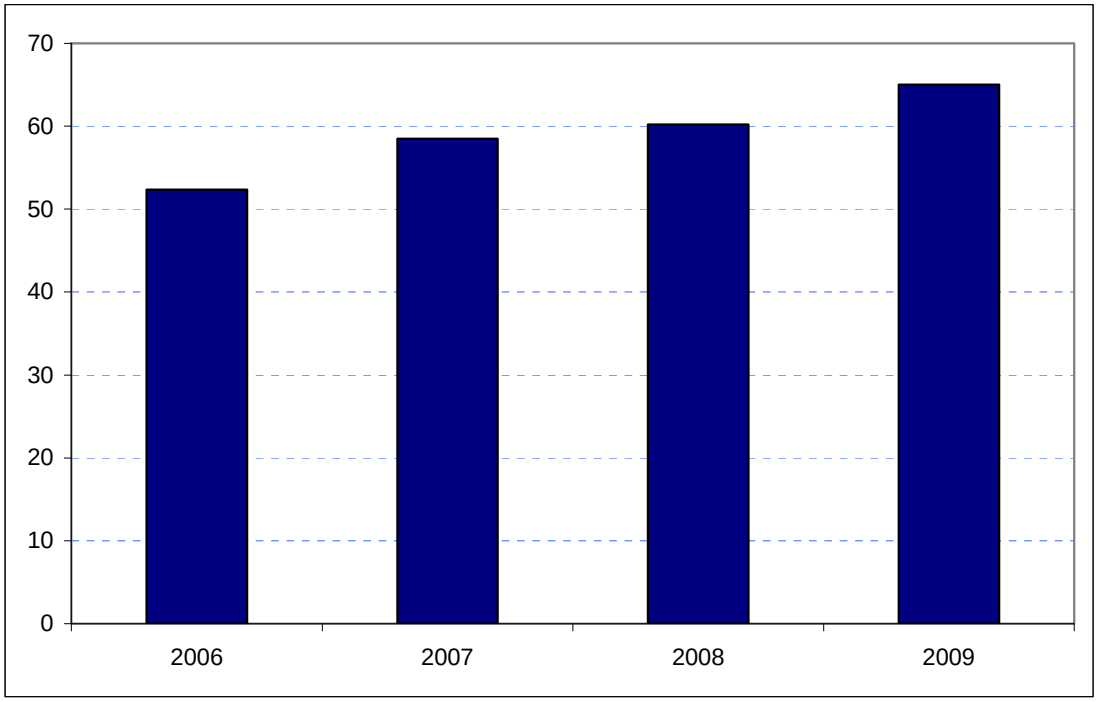


Sources: IPS, UKTS, BRES, LDA surveys and GLA Economics calculations

Waltham Forest
Borough Rank: 31

The estimates in Figure 5.31 show an upward trend in Waltham Forest' overseas visitor spend. Overseas tourist spend was estimated to be £52 million in 2006. It increased to £59 million in 2007 and increased again marginally in 2008 to £60 million. The estimate for 2009 is £65 million. This means that overseas tourist spend in the Borough is thought to be up 25 per cent since 2006.

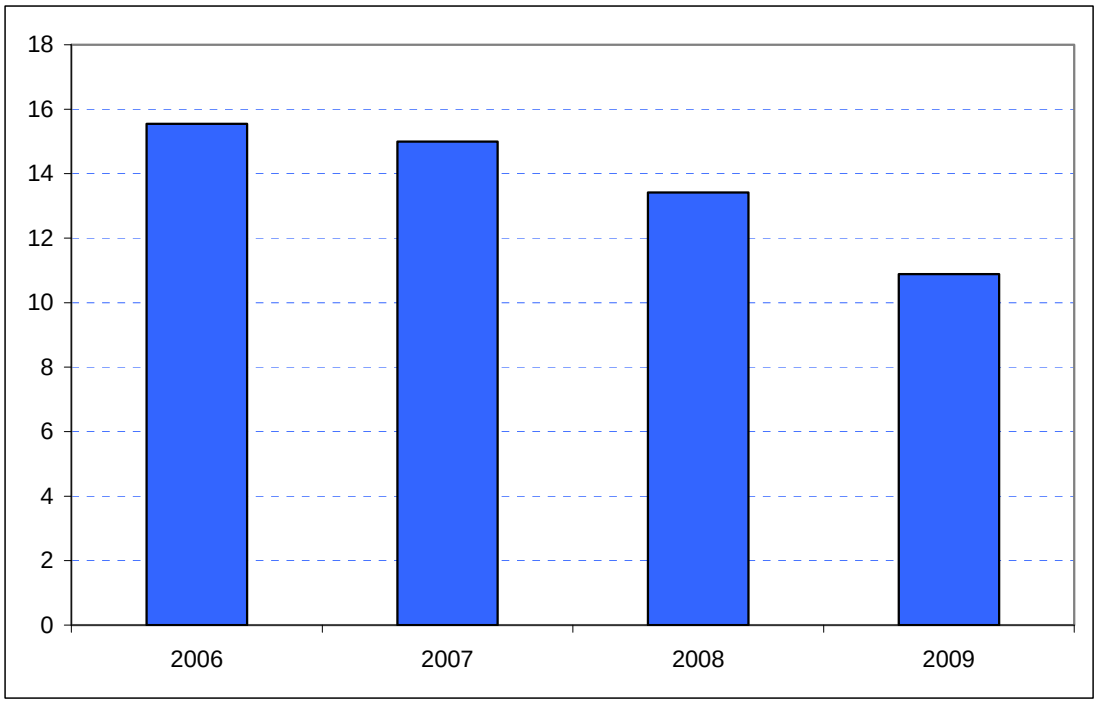
Figure 5.31: Overseas tourism expenditure in Waltham Forest (£ millions)



Sources: IPS, BRES, LDA surveys and GLA Economics calculations

Figure 6.31 shows a partially counterbalancing trend in domestic overnight visitor spend in the Borough (although domestic visitor spend is a much smaller component than overseas tourist spend), falling each year since 2006. In 2006 domestic overnight visitor spend was estimated to be £16 million. This fell to £15 million in 2007 and although the 2008-2009 fall has been smaller, the trend has continued. In 2008 the figure fell to £13 million followed by another fall in 2009 to £11 million.

Figure 6.31: Domestic staying tourism expenditure in Waltham Forest (£ millions)



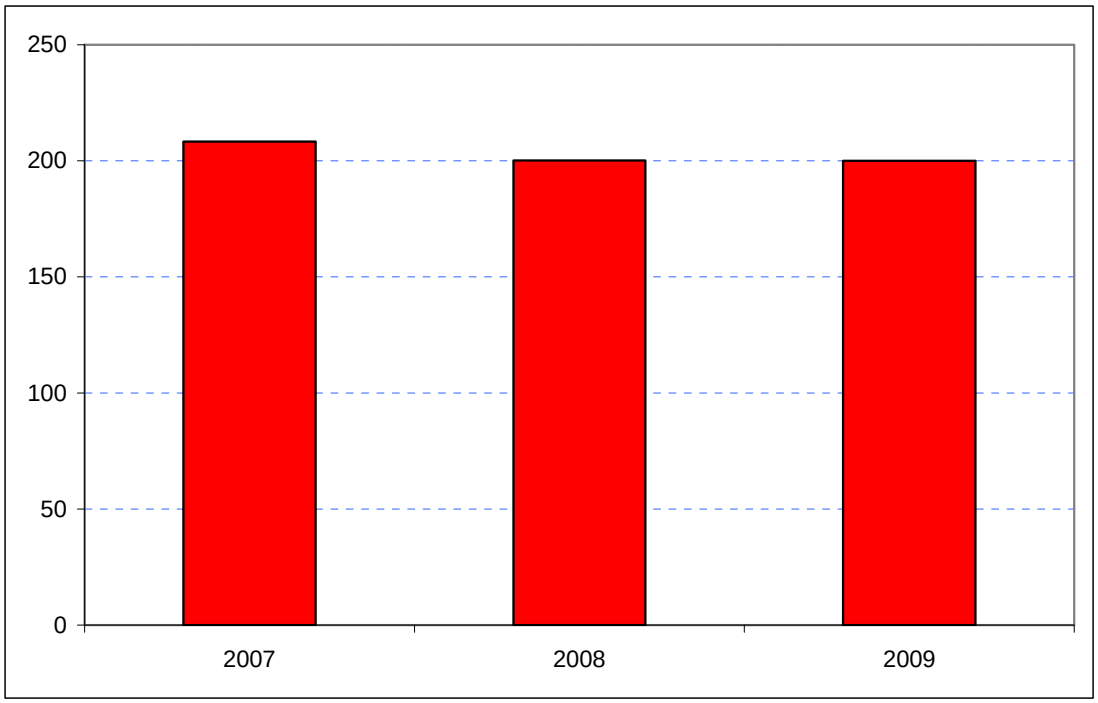
Sources: UKTS, BRES, LDA surveys and GLA Economics calculations

An experimental estimate of day visitor spend is provided in Tables 2a and 2b of Chapter 2. It should be emphasised that these are modelled estimates and further details of the data issues presented by day visitor tourism can be found in GLA Economics' Current Issues Note 29[38]. Details of the modelling and changes to it from previous LATI estimates can be found in the methodology section.

Modelled estimates of day visitor spend have also been in slight decline and when these are added-in, total tourism spend in Waltham Forest has declined from £209 million in 2007 to £200 million in 2008 and was stable in 2009 as shown in Figure 7.31.

[38] http://www.london.gov.uk/publication/estimating-contribution-leisure-day-visitors-londons-tourism-industry
GLA Economics - Estimating the contribution of leisure day visitors to London's tourism industry (March 2011)

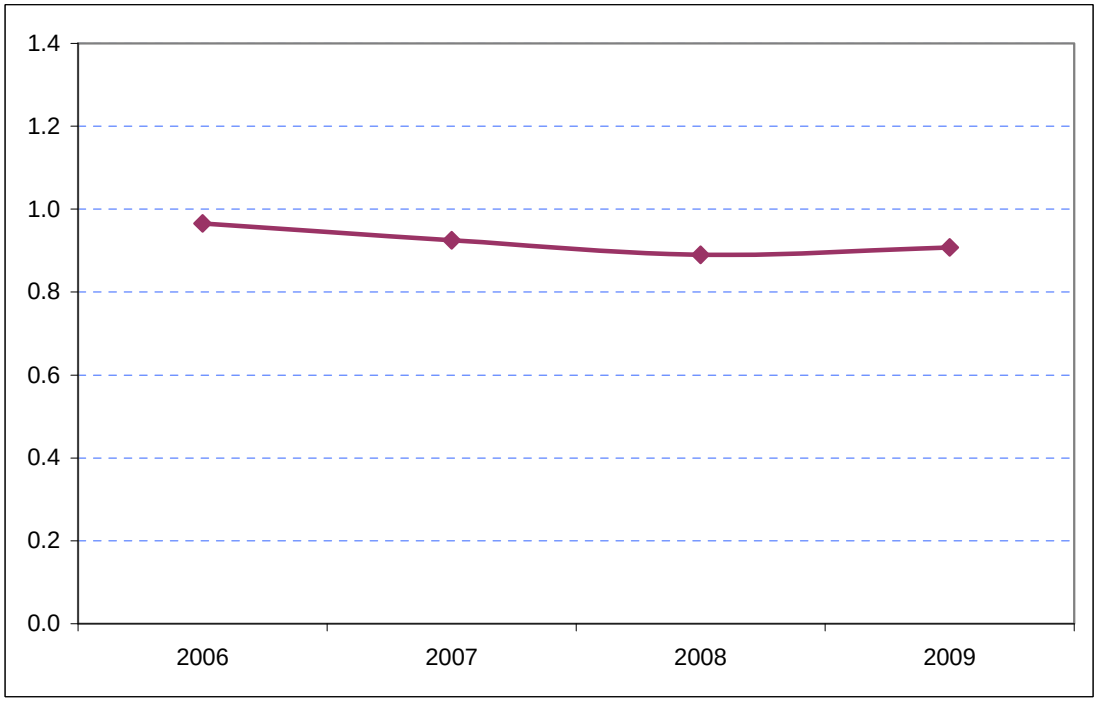
Figure 7.31: Estimates of total tourism expenditure in Waltham Forest including experimental estimates of day visitor spend (£ millions)



Sources: IPS, UKTS, BRES, LDA surveys and GLA Economics calculations

Figure 8.31 shows that Waltham Forest's share of total London tourism expenditure has declined slightly from just under 1.0 per cent to around 0.9 per cent.

Figure 8.31: Waltham Forest's estimated share of total London tourism expenditure (%)

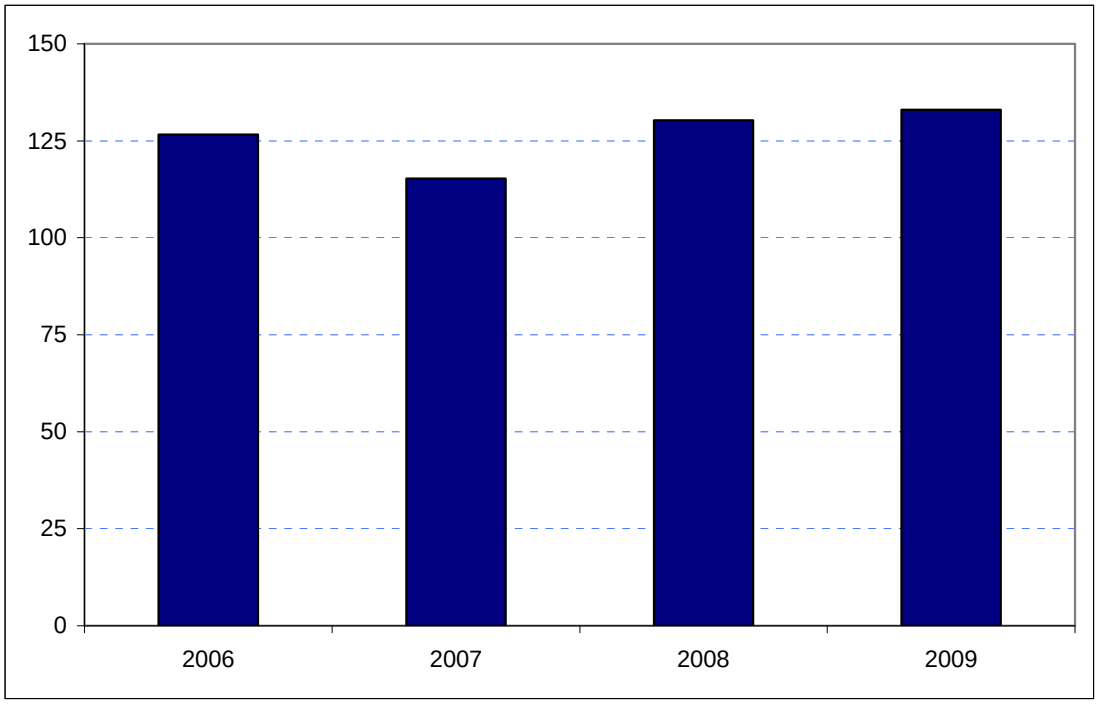


Sources: IPS, UKTS, BRES, LDA surveys and GLA Economics calculations

Wandsworth
Borough Rank: 14

The estimates in Figure 5.32 show a broadly consistent level in Wandsworth' overseas visitor spend with the exception of 2007. Overseas tourist spend was estimated to be £127 million in 2006 before declining in 2007 to £115 million. Estimated spend for the two later years is higher at £130 million for 2008 and £133 million for 2009.

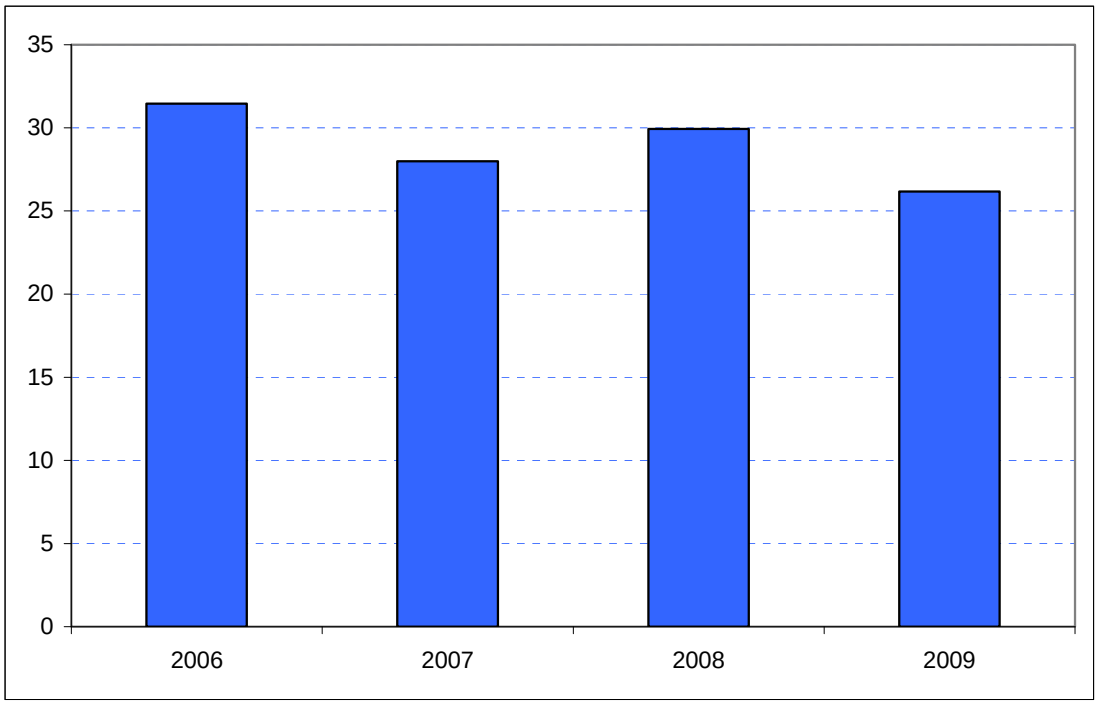
Figure 5.32: Overseas tourism expenditure in Wandsworth (£ millions)



Sources: IPS, BRES, LDA surveys and GLA Economics calculations

Figure 6.32 shows a less consistent picture for domestic overnight visitor spend. This is estimated to have been £31 million in 2006 but fallen to £28 million in 2007. The two later years, published here for the first time, are similarly variable: £30 million in 2008 and £26 million in 2009.

Figure 6.32: Domestic staying tourism expenditure in Wandsworth (£ millions)



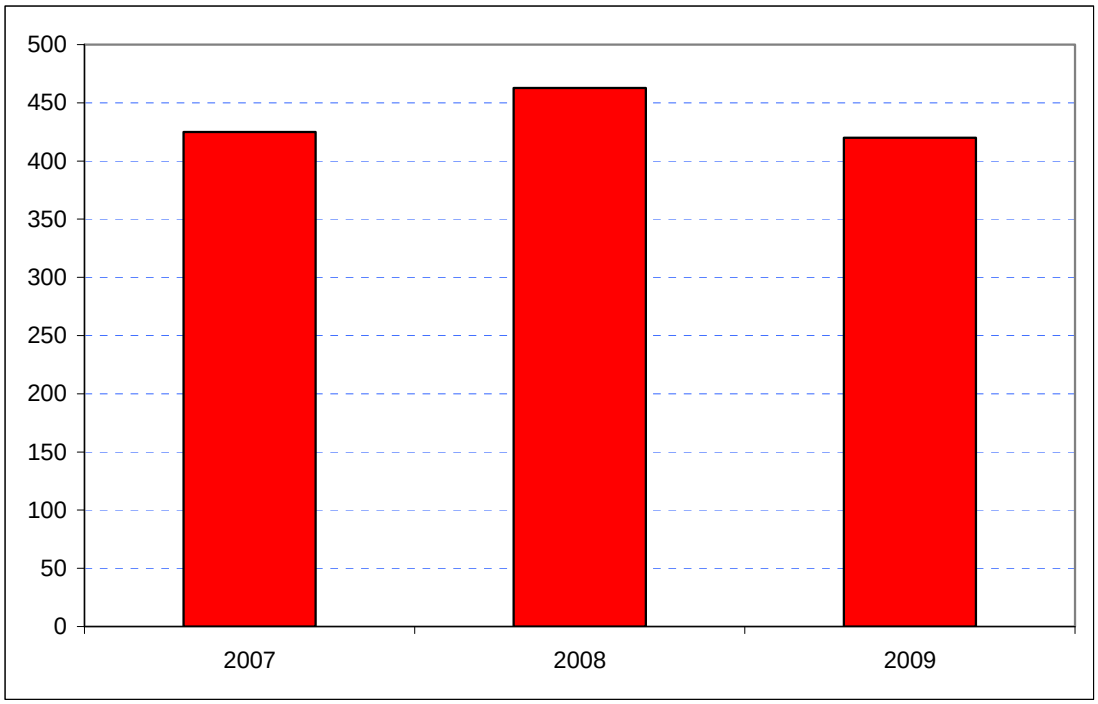
Sources: UKTS, BRES, LDA surveys and GLA Economics calculations

An experimental estimate of day visitor spend is provided in Tables 2a and 2b of Chapter 2. It should be emphasised that these are modelled estimates and further details of the data issues presented by day visitor tourism can be found in GLA Economics' Current Issues Note 29[39]. Details of the modelling and changes to it from previous LATI estimates can be found in the methodology section.

Once day visitor spend has been added-in, total tourism expenditure is estimated at £425 million in 2007, £463 million in 2008 and £420 million in 2009 as shown in Figure 7.32.

[39] http://www.london.gov.uk/publication/estimating-contribution-leisure-day-visitors-londons-tourism-industry
GLA Economics - Estimating the contribution of leisure day visitors to London's tourism industry (March 2011)

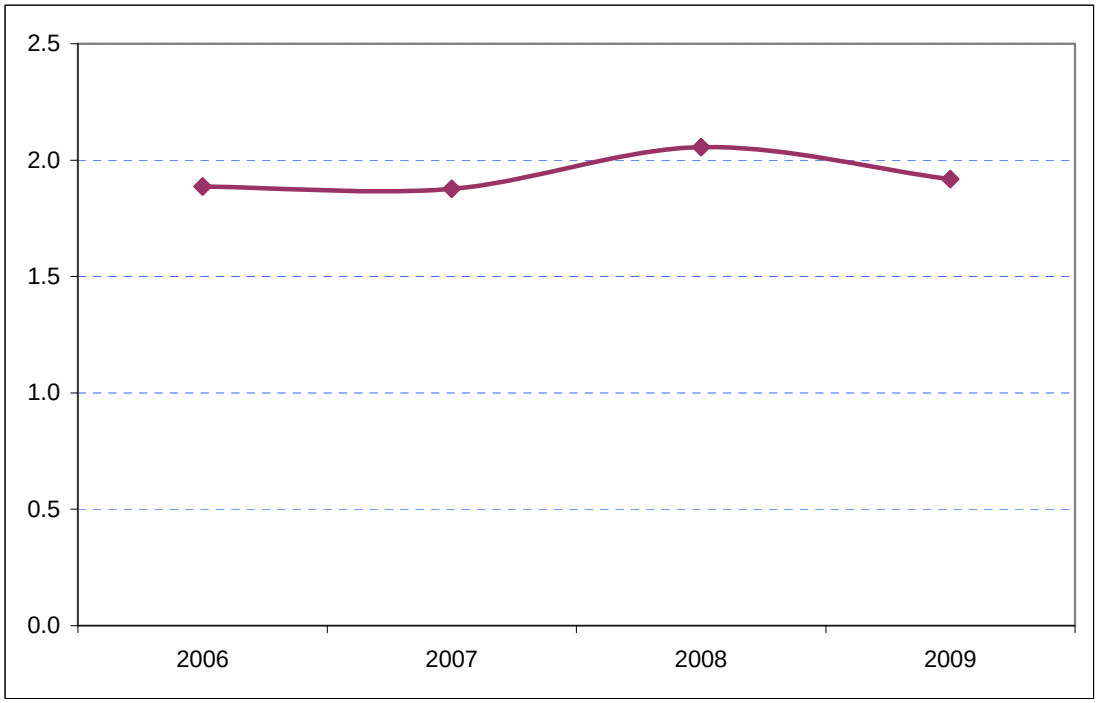
Figure 7.32: Estimates of total tourism expenditure in Wandsworth including experimental estimates of day visitor spend (£ millions)



Sources: IPS, UKTS, BRES, LDA surveys and GLA Economics calculations

Figure 8.32 shows that Wandsworth's share of total London tourism expenditure has been broadly constant at 1.9 per cent with the exception of 2008 when it represented nearly 2.1 per cent of tourism expenditure in the capital.

Figure 8.32: Wandsworth's estimated share of total London tourism expenditure (%)

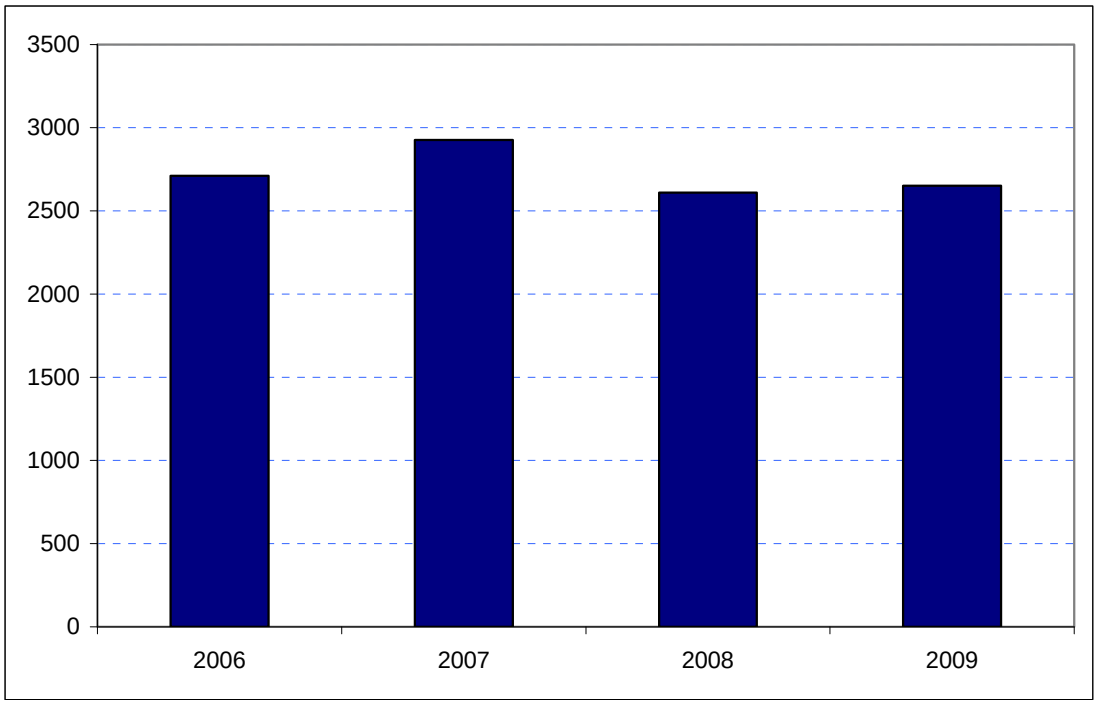


Sources: IPS, UKTS, BRES, LDA surveys and GLA Economics calculations

Westminster
Borough Rank: 1

Accounting for somewhere between a quarter and a third of all London's tourism spend, Westminster is by far the most important of all the Boroughs for London's tourism economy. Figure 5.33 shows overseas tourism spend in the Borough. This was estimated at £2,711 million in 2006. The 2007 estimate suggested an increase to £2,927. Subsequently, the two latest years show a fall to £2,610 million in 2008 and a small increase to £2,676 million in 2009.

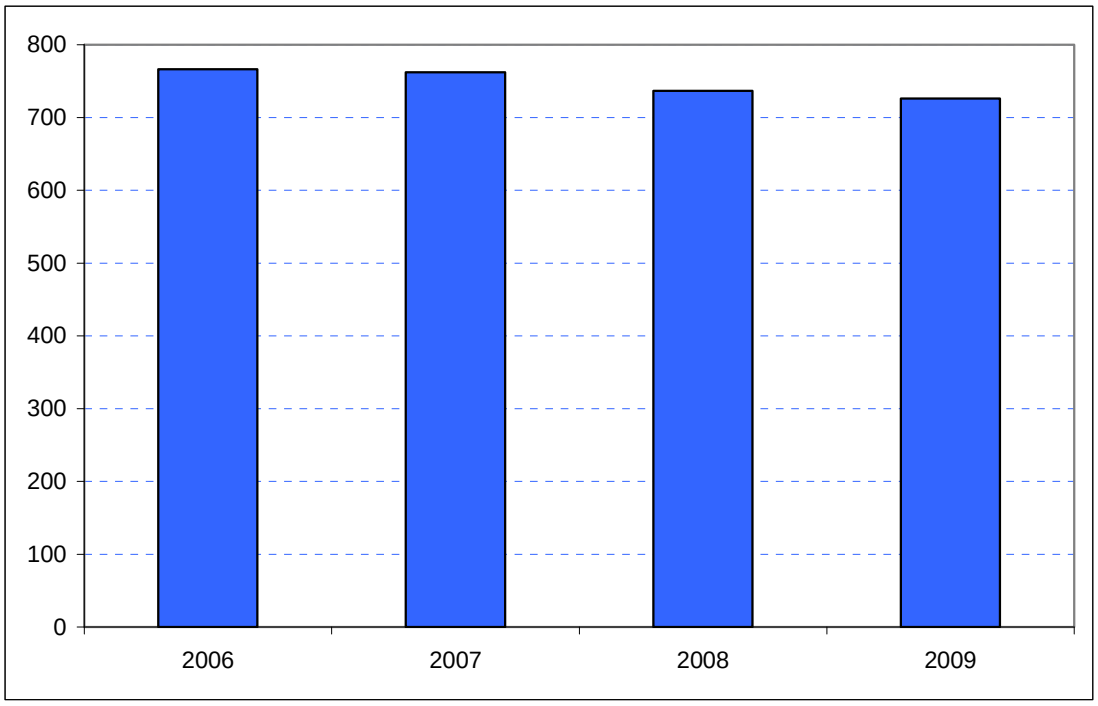
Figure 5.33: Overseas tourism expenditure in Westminster (£ millions)



Sources: IPS, BRES, LDA surveys and GLA Economics calculations

The declines in Figure 6.33 may appear small but are actually significant in terms of their impact upon the domestic tourism sector in London as a whole. Domestic overnight expenditure is estimated to have been £766 million in 2006, falling to £762 million in 2007. Estimates suggest that this decline has continued: to £736 million in 2008 and £726 million in 2009.

Figure 6.33: Domestic staying tourism expenditure in Westminster (£ millions)



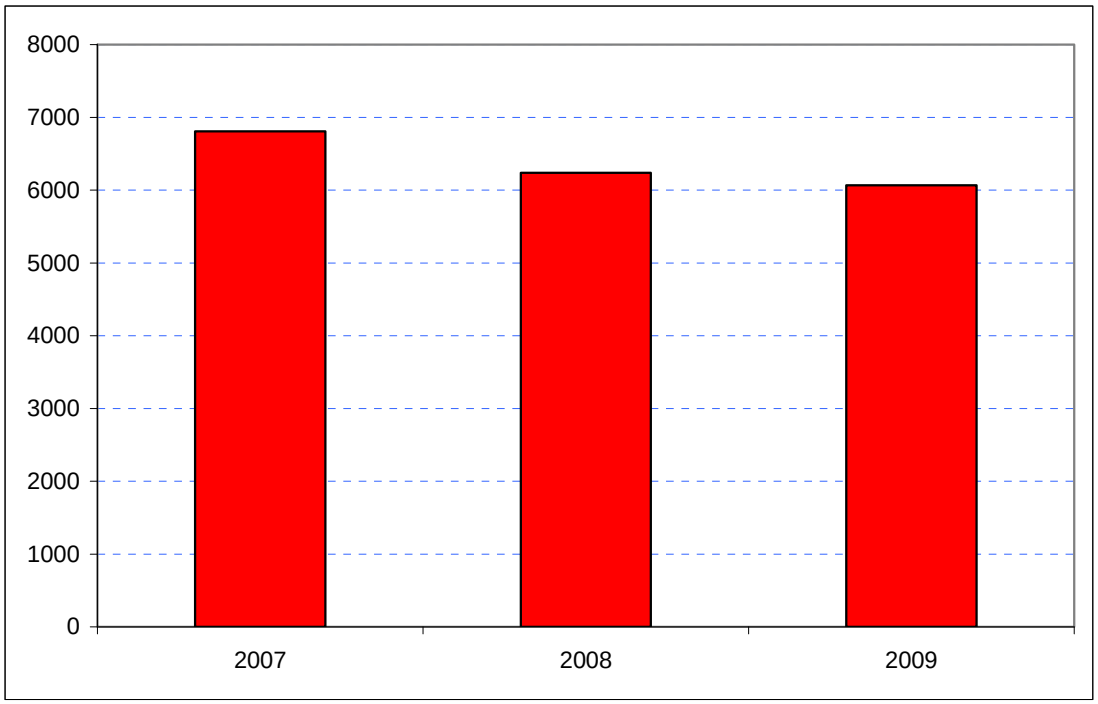
Sources: UKTS, BRES, LDA surveys and GLA Economics calculations

An experimental estimate of day visitor spend is provided in Tables 2a and 2b of Chapter 2. It should be emphasised that these are modelled estimates and further details of the data issues presented by day visitor tourism can be found in GLA Economics' Current Issues Note 29[40]. Details of the modelling and changes to it from previous LATI estimates can be found in the methodology section.

The modelled estimates suggest that it is changes to day visitor expenditure that have had the greatest impact on Westminster in recent years. Once these are included, total tourism expenditure in Westminster is estimated to have fallen to £6,820 million in 2007, £6,238 million in 2008 and to £6,068 million in 2009 as shown in Figure 7.33. Interested parties should consult the methodological section for a discussion on what would have happened to total expenditure in the Borough if alternative data sources had been used.

[40] http://www.london.gov.uk/publication/estimating-contribution-leisure-day-visitors-londons-tourism-industry
GLA Economics - Estimating the contribution of leisure day visitors to London's tourism industry (March 2011)

Figure 7.33: Estimates of total tourism expenditure in Westminster including experimental estimates of day visitor spend (£ millions)



Sources: IPS, UKTS, BRES, LDA surveys and GLA Economics calculations

Figure 8.33 shows that Westminster's share of total London tourism expenditure has been declining in recent years. In 2006 it was estimated to have been 30.7 per cent of total tourism expenditure in the capital. By 2009 this had fallen to 27.6 per cent. (Intermediate years were as follows: 30.3 per cent in 2007 and 27.7 per cent in 2008).

Figure 8.33: Westminster's estimated share of total London tourism expenditure (%)

Sources: IPS, UKTS, BRES, LDA surveys and GLA Economics calculations

Methodological appendix 1: Sensitivity of results and alternative methodologies

1. Accommodation spend

Accommodation spend is the most important driver in the model since, as well as the accommodation expenditure result, in the staying tourist visitor types it also drives the 'other' spend result. Therefore it drives 50 per cent of the international spend and 57 per cent of domestic overnight visitor spend.

The accommodation category of spend itself is important. Over the last three years of model runs it has accounted for 15 per cent of total spend (even given that the most significant visitor type – day visitors – has no accommodation spend). In addition, its use as a proxy in the 'other' spend category for staying visitors means that it effectively accounts for a further 18 per cent of staying visitor spend and a further 8 per cent of total tourism spend. This means that for the average Borough, accommodation is driving almost a quarter of the total result.

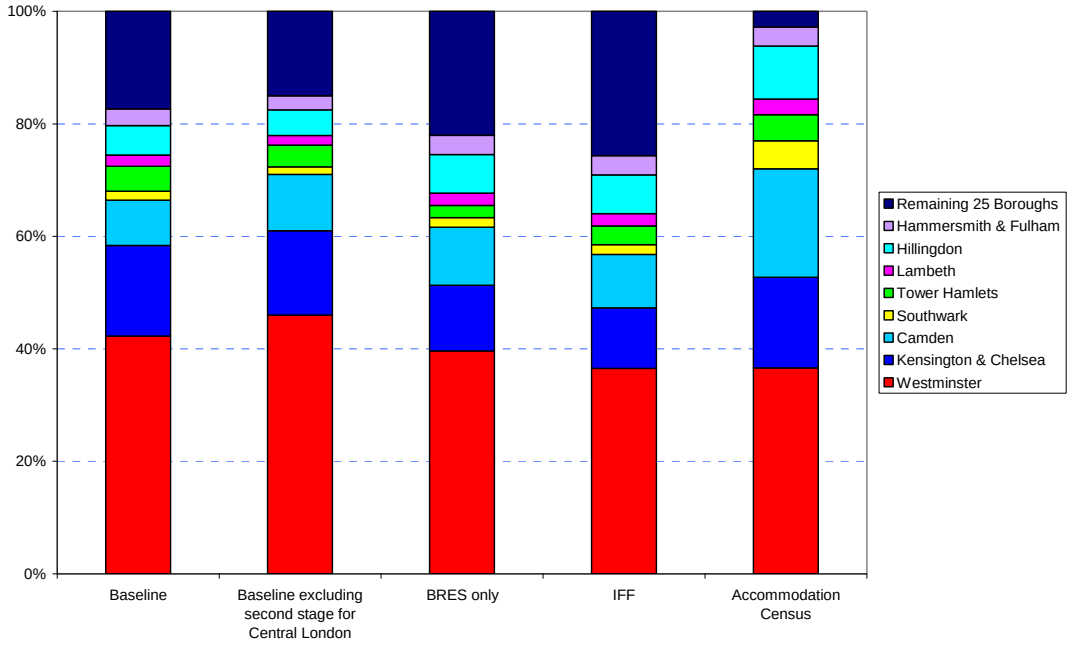
Therefore the final result is very reliant on the accommodation spend estimate. One factor in the choice of how accommodation spend was estimated for the 2008 and 2009 estimates was consistency with the 2007 estimates. However, a number of alternatives were investigated and the broad results of those alternatives are presented here for comparison. Overall the LATI model is sensitive to changes in the accommodation spend calculation methodology.

The following options are examined briefly here:

- Baseline (the methodology used in the 2008 and 2009 data runs);
- Baseline plus the exclusion of Central London Boroughs from the second stage of the accommodation spend methodology;
- Replacing the whole accommodation methodology simply with BRES employment shares;
- Use of the IFF survey instead of the Experian but maintaining Experian's superboroughs (which differ from IFF's);
- Use of the LDA accommodation census database.

The results in Figure 9 focus only on overseas accommodation spend to present a broad picture of what might have happened to the results from the LATI model if each alternative had been used for the calculation. It shows only the eight 'largest' Boroughs (in tourism terms – not necessarily the 8 largest in accommodation spend terms) which actually account for 60 per cent of total of tourism spend and 83 per cent of overseas accommodation spend according to the baseline. The overall effect on the 'smaller' Boroughs can be gauged in part by the residual.

Figure 9: Shares of overseas accommodation spend under the above scenarios



It can be seen from Figure 9 that most other methodologies (BRES, the IFF survey and the LDA accommodation census) would produce results for Westminster for 2008 and 2009 lower than the baseline result (which itself is down on the result produced in 2007). In the case of the IFF survey and the LDA accommodation census, these would involve major downward movements. The exception would be using the baseline excluding the second stage for Central London (other than the City where sample size is limiting). This would raise the results in Westminster but lower results in Kensington & Chelsea (which itself is down substantially on the 2007 result). Camden's results would also be raised. Under the existing baseline, Camden's results have been basically constant for the three year period.

In the future alternative methodologies may be examined using the (albeit limited) data on pricing and occupancy rates. This is one area where there could be methodological improvements in the future, although the future of such surveys is currently not secure.

At present, using a simple methodology based on the price data available from the Experian accommodation survey, Westminster's share of London tourism expenditure for 2009 would rise from 42 per cent to nearly 49 per cent. That does make some sense because one would probably expect to pay more for a room in Westminster than in the outer Boroughs. One might also anticipate that occupancy rates would be higher.

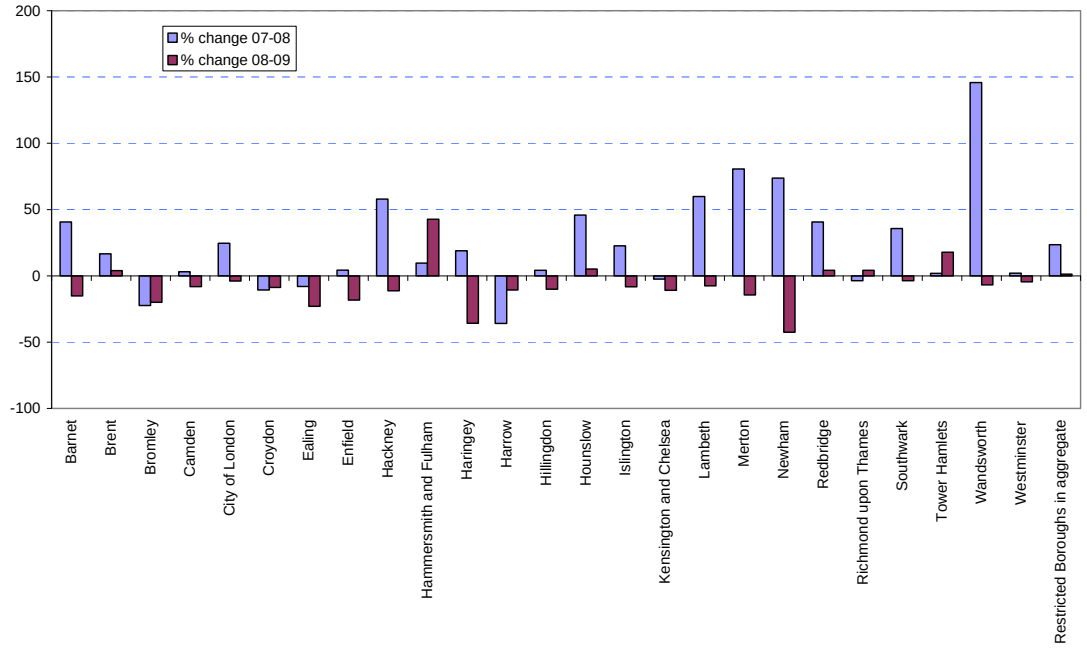
2. The shift to BRES and volatility in BRES between 2008 and 2009

GLA Economics undertook a large amount of work separating out changes caused by the shift from SIC 2003 to SIC 2007 from the changes created by the shift of national employment survey from ABI to BRES, in order to exclude the former from any analysis. The results of this analysis show that there are major changes between the ABI used for the 2007 data run and the 2008 and 2009 data runs using BRES. Furthermore, at a Borough level, there is a fair degree of volatility between BRES results for 2008 and those for 2009 on individual groupings of SIC codes within tourism sub-sectors. It is

beyond the scope of this report to speculate as to whether these changes represent real movements in local economies within the tourism sector.

Conveniently, the groups of SIC codes that really matter to LATI's spend estimates are not ones that have been affected dramatically by Standard Industrial Classification restructuring. The most significant of all is probably employment in hotels and other accommodation. As can be seen in Figure 10, there is considerable volatility at Borough level. Note here that 'restricted Boroughs' covers all those Boroughs for which NOMIS and the ONS attach a disclosure warning.

Figure 10: Percentage changes in Borough hotels and other accommodation employment, 2007 – 2008 and 2008 – 2009 (Source: ABI and BRES)



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Chinese

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Vietnamese

Nếu bạn muốn có văn bản tài liệu
này bằng ngôn ngữ của mình, hãy
liên hệ theo số điện thoại hoặc địa
chỉ dưới đây.

Greek

Αν θέλετε να αποκτήσετε αντίγραφο του παρόντος εγγράφου στη δική σας γλώσσα, παρακαλείστε να επικοινωνήσετε τηλεφωνικά στον αριθμό αυτό ή ταχυδρομικά στην παρακάτω διεύθυνση.

Turkish

Bu belgenin kendi dilinizde
hazırlanmış bir nüshasını
edinmek için, lütfen aşağıdaki
telefon numarasını arayınız
veya adrese başvurunuz.

Punjabi

ਜੇ ਤੁਹਾਨੂੰ ਇਸ ਦਸਤਾਵੇਜ਼ ਦੀ ਕਾਪੀ ਤੁਹਾਡੀ ਆਪਣੀ ਭਾਸ਼ਾ ਵਿਚ ਚਾਹੀਦੀ ਹੈ, ਤਾਂ ਹੇਠ ਲਿਖੇ ਨੰਬਰ 'ਤੇ ਫ਼ੋਨ ਕਰੋ ਜਾਂ ਹੇਠ ਲਿਖੇ ਪਤੇ 'ਤੇ ਰਾਬਤਾ ਕਰੋ:

Hindi

यदि आप इस दस्तावेज की प्रति अपनी
भाषा में चाहते हैं, तो कृपया निम्नलिखित
नंबर पर फोन करें अथवा नीचे दिये गये
पते पर संपर्क करें

Bengali

আপনি যদি আপনার ভাষায় এই দলিলের প্রতিলিপি
(কপি) চান, তা হলে নীচের ফোন্ নম্বরে
বা ঠিকানায় অনুগ্রহ করে যোগাযোগ করুন।

Urdu

اگر آپ اِس دستاویز کی نقل اپنی زبان میں
چاھتے ھیں، تو براہ کرم نیچے دئے گئے نمبر
پر فون کریں یا دیئے گئے پتے پر رابطہ کریں

Arabic

إذا أردت نسخة من هذه الوثيقة بلغتك، يرجى
الاتصال برقم الهاتف أو مراسلة العنوان
أدناه

Gujarati

જો તમને આ દસ્તાવેજની નકલ તમારી ભાષામાં
જોઈતી હોય તો, કૃપા કરી આપેલ નંબર ઉપર
ફોન કરો અથવા નીચેના સરનામે સંપર્ક સાધો.

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