

# London Tourism Action Plan 2009-13



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# Mayor's foreword

London has been voted the greatest destination in the world and my vision for London is to see it remains as the greatest city, for visitors, workers, students and residents alike. I want it to excel amongst other global cities, providing the highest standard of living for its people and dynamism and energy for its enterprises. London's strength as the leading visitor destination is based on these qualities alongside its traditions, its diversity and its heritage.





Over 26 million visitors come to London every year and our tourism industry has a key role to play in shaping the capital's economy. It is worth over £16 billion per annum and employs 285,000 people.

At the time of going to publication, we are facing tough economic conditions and the recession has affected us all. In response to these challenging times I have created a package of practical measures. Through my Economic Recovery Action Plan we will refocus resources and build on existing success. This will include extra support and advocacy for the city's tourism industry, recognising the important role that tourism has to play in London's wider economic recovery.

Through providing additional funding for marketing, the official tourism organisation for the capital, Visit London, has delivered a number of successful promotional campaigns to attract more visitors to the city and inject new income into the city's economy. Already, we are seeing the benefits of this policy and despite the recession, some sectors of our visitor economy are seeing growth year on year.

My Economic Recovery Action Plan is one example of the new approach and priorities that my administration has brought to the running of

London. I am also Chair of the London Skills and Employment Board and direct the London Learning and Skills Council with its £635 million adult skills budget. Recently, I launched the Promote London Council to create a more comprehensive and joined up approach to marketing the capital, particularly in the run-up to the London 2012 Olympic and Paralympic Games.

The Games offer us a massive incentive and opportunity to show off the city both to visitors during the time they will be here and through the media to a massive worldwide audience. London has the chance to reinforce its status as a first class visitor destination and advance its standing in new markets on the back of the Games. This Tourism Action Plan has a key role to play in delivering my aim of providing an inspirational citywide experience for everyone in the capital and to maximise the opportunities for legacy.

The GLA Group has an important role to play in continuing to invest in the city's leisure and business visitor facilities as well as improving customer service standards. It is important that we provide a quality experience to the hundreds of thousands who are exploring the city on a daily basis. We want visitors to be lured to the cultural gems of outer London as well as to the many attractions and facilities we all know in the centre.

As Mayor, my role is to set out the broad vision and strategy but I know we can only fully realise that vision through partnership with others. I would like to

thank you for your comments and support in creating this Action Plan and I look forward to continuing to work with all London stakeholders to deliver this Plan and ensure that our capital continues to be the leading global destination for visitors.

A handwritten signature in blue ink, appearing to read 'Boris Johnson'.

**Boris Johnson**  
**Mayor of London**

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**London has the chance to reinforce its status as a first class visitor destination and advance its standing in new markets on the back of the Games.**

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# Background

As part of an extensive consultation process in late 2005, a ten year vision for tourism in London and five key supporting themes were identified. The London Tourism Action Plan 2009-13 will support the delivery of this Vision.



## Vision

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

### Key themes

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

The 2006-09 Action Plan established the tourism foundations needed to contribute to the success of the 2012 London Olympic and Paralympic Games. The second Action Plan (2009-13) will focus on delivering the tourism elements necessary to ensure a successful Games and lay the foundations for a post-Games tourism legacy. The third (2013-16) will ensure that the tourism legacy benefits are captured. Together these plans represent the actions that the LDA will support to deliver the London Tourism Vision.

The LDA's restructured Global Competitiveness team will deliver the Tourism Action Plan through a new commissioning delivery model. The plan has been developed in line with the LDA's new strategic focus on Growth, Skills and Jobs.

### Stimulating economic recovery

Research carried out in early 2009 on domestic consumer attitudes towards short breaks has highlighted that, while holidays remain a high priority consumers are tightening their belts.<sup>1</sup> For example short breaks could be replaced by day trips, to avoid additional costs. On the other side of the coin however, London has become an increasingly affordable destination for markets in Europe and the USA and this represents a great opportunity for the industry.

The Tourism Action Plan recognises the impact that the downturn has had and sets out ways that the capital's visitor economy can meet its growing challenges in the short term while ensuring that London is well positioned following economic recovery. In response to the downturn the Mayor published The Mayor's Economic Recovery Action Plan in December 2008. This Plan sets out how the GLA Group and other partners will build on current successful interventions and refocus resources in areas most likely to stimulate economic recovery. This includes extra funding support and advocacy for the city's tourism industry, recognising the important role that tourism has to play in London's wider economic recovery.

### London's 2012 opportunity

This Action Plan is a key part of the process of building up to the Games in 2012. The London Olympic and Paralympic Games provides the chance to showcase the city to visitors during Games time and through the media to a massive global audience. London has the chance to reinforce its status as a premier global destination and challenge preconceptions in order to advance London's brand on the back of the Games.

London now has a strict timetable in which to deliver a world class welcome for the Games and beyond and to capitalise on the exposure that hosting the Games offers. The workstreams that will deliver the city experience during Games time are set out by the Mayor, London Organising Committee of the Olympic and Paralympic Games (LOCOG) and their partners in the London 2012 City Operations Strategic Framework document. The London Tourism Action Plan will play a key role in supporting the City Operations Framework and in delivering its aim to "provide an inspirational, world-class citywide experience for everyone participating in the Games in London, to safeguard the smooth running of London in Games time, and to maximise the opportunities for legacy from this work."

<sup>1</sup> VisitBritain and Visit London, 2009

# The importance of tourism to London



## London's visitor economy

Tourism is a key driver of London's economy. In 2008 London attracted nearly 15 million staying overseas visits and over 11 million staying domestic visitors.<sup>2</sup> In addition, the LDA estimates, using experimental results from an omnibus survey of the UK population that around 200 million tourism day visits are made to and within the capital for, amongst other attractions, the shopping, art exhibitions, theatre and historic sites (based on tourism day visits defined as trips of at least three hours duration and not taken on a regular basis).<sup>3</sup> Tourism helped to support 253,000 jobs and resulted in £22 billion of visitor expenditure in the city, of which £8 billion is generated by staying overseas visitors and over half is the LDA's estimate of tourism day visitor expenditure.<sup>4</sup> While much of the capital's tourism activity happens in inner London it has a significant impact on the city as a whole with the outer London boroughs receiving just over 30 % of overall visitor spend.<sup>5</sup>

London's visitor economy enjoyed a period of growth in leisure markets from 2002 to 2007, recovering from the setbacks after 11 September 2001. Between 2002 and 2007 total visits and spend grew steadily though the number of staying domestic visitors declined. In 2008 the number of overseas visitors declined from 15.3 million in 2007 to 14.7 million but domestic visitor numbers increased from 10.1 million to 11.3 million. Overall, staying visitor numbers rose in 2008 and spend of £15 billion was also slightly up on 2007 figures.<sup>6</sup>

Since the global economic downturn began in late 2008 there has been a steady decline in the number of international arrivals to the UK. The UN World Tourism Organisation (UNWTO) reports that although tourism initially resisted the economic downturn, there is now weakening demand overall. Worldwide international tourist arrivals declined at a rate of 8 % between January and February in 2009. Northern, Southern and Mediterranean Europe, North-East Asia, South Asia and the Middle East are amongst the regions most affected. Overall, UNWTO expects 2009 international tourism to be in the range of 0 to 2 % decline.<sup>7</sup>

Overseas spending in London depends on the fluctuation of the exchange rate. London began 2009 with strong value messages to European and American markets to capitalise on the favourable exchange rates for overseas visits. The domestic market has been affected by the economic downturn although Visit London research shows that there are opportunities to stimulate the market if the right incentives and messages are aligned. These trends have created a challenging and rapidly changing business environment for London visitor industry.

London's visitor economy has a key role to play in helping London's wider economy emerge from the economic downturn. Targeted marketing activity can provide rapid economic return to London, supporting business, jobs and confidence. Tourism, while sometimes dismissed as a low-wage sector, provides local jobs with transferable skills that include thousands of entry level jobs for those with few qualifications.

<sup>2</sup> International Passenger Survey (IPS) 2008 + UK Tourism Survey (UKTS) 2008

<sup>3</sup> LDA Omnibus Survey 2008

<sup>4</sup> Spend – LIPS, UKTS and LDA Omnibus Survey and jobs/employment – ABI 2006

<sup>5</sup> Local Area Impact Model 2007, LDA

<sup>6</sup> IPS 2008 and UKTS 2008

<sup>7</sup> UN World Tourism Organisation World Tourism Barometer, July 2009

## Importance of London to the rest of the UK

London is critical to the health of the UK's visitor economy. London plays an important gateway role for the UK with 75 % of all visitors to the UK coming through one of London's airports. Forty seven percent of all overseas visitors to Britain stay in London as part of their visit.

In 2008 London accounted for over half of all spend in the UK by overseas visitors, 20 % of the national stock of hotel bedrooms and more than half of the top ten charging visitor attractions.<sup>8</sup> For all of these reasons, it is critical that London delivers a top-quality visitor experience, because what happens here has a huge impact on our visitors' abiding impressions of the UK as a whole.

## The importance of 2012 to London and the UK's visitor economy

The 2012 Olympic and Paralympic Games provide London and the UK with a huge opportunity for London's visitor economy to showcase the city, to solidify London's status in traditional markets and challenge preconceptions in new and emerging markets.

There are two types of tourism impacts expected from London 2012.

- Games related (athletes, officials, sponsors, spectators and media visiting in the run up to and during the Games)
- Games inspired (additional tourist visits to and business events in London as a result of heightened interest in the destination)

The size and nature of London offers an opportunity to minimise any displacement effect of the Games and attract non-Games related visitors during the Games.

The four most recent Olympic Games host cities all experienced increases in tourism, whether this is measured in terms of spend per head in the long-term (from a 22 % increase in Atlanta to a 65 % increase in Seoul), the spend of new visitors, or by the increased numbers of international meetings, conferences and sporting events the cities were able to attract in the years after the Games. The Sydney Games in 2000 generated 15 % more inbound visitors in September 2000 compared to 1999 and saw visitor numbers for 2000 as a whole up by 11 % on 1999. The Athens Games of 2004 generated a 10 % increase in inbound visitors in 2005 and are expected to generate additional annual visitors of 5 million a year by 2009.<sup>9</sup> Oxford Economics have forecast that the London Olympic and Paralympic Games in 2012 will generate £2.1 billion in additional economic benefit to the UK as a whole, of which around £1.5 billion will be concentrated in London.<sup>10</sup>

<sup>8</sup> VisitBritain

<sup>9</sup> Review and Analysis of Tourism to Previous Olympic Destinations. Lessons and Implications for London 2012. Kurt Janson 2007

<sup>10</sup> The Value of the London 2012 Olympic and Paralympic Games to UK Tourism, Oxford Economic, September 2007

The Cultural Olympiad offers the hosts of the Olympic and Paralympic Games the opportunity to showcase their cultural offer over a four year period. Research carried out by the LDA into the pre-Games tourism impacts of the Cultural Olympiad has shown that to date there has been limited short term effect on overseas tourism but that it has had positive medium term impacts on destination perception.<sup>11</sup> The scale and nature of the Olympiad dictate how attractive the events are to visitors but it does play a major role in galvanising local tourism support and bringing the culture and tourism sectors together. The Cultural Olympiad and other cultural activities and events will be delivered by a number of partners. The promotion of these events and activities falls within the overall destination marketing aspect of this Action Plan, but not the staging costs.

During the Games, cultural attractions and events have a significant opportunity to engage and play to larger, new audiences. Cultural events play a critical role in offering alternatives to sporting events for the International Olympic Committee (IOC) family, the resident population and for non-Games related visitors. Visual art exhibitions do particularly well because they are easier to 'pop' into during spare moments between sporting events. In Sydney 2000 30 % of Olympic attendees (visitors and locals) attended cultural events or exhibitions. Performing Arts could attract Games spectators with outdoor and street based events at well positioned locations.<sup>12</sup>

<sup>11</sup> [Tourism Potential of the Cultural Olympiad, 2007, LDA](#)

<sup>12</sup> [Local Visitors and Tourists at the Modern Pentathlon in Sydney 2000 – a Contribution on the Internal Differentiation of an Olympic Spectator, Manfred Messing & Norbert Müller & Klaus Schormann \(no date\)](#)

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# Leadership in tourism



## Leadership in London

There are a number of organisations involved in the planning, coordination and delivery of tourism activity across London.

The diagram below sets out some of the relationships between the organisations that provide leadership for the development of London as a visitor destination.

### Mayor of London

Under the Greater London Authority Act (1999) the Mayor of London has the statutory responsibility for the promotion and development of tourism.

This responsibility is devolved to the LDA.

The Mayor of London also has responsibility for co-ordinating the work required in London, outside the official venues, to host an inspirational, safe and inclusive Games, known as the London City Operations programme.

### Greater London Authority (GLA)

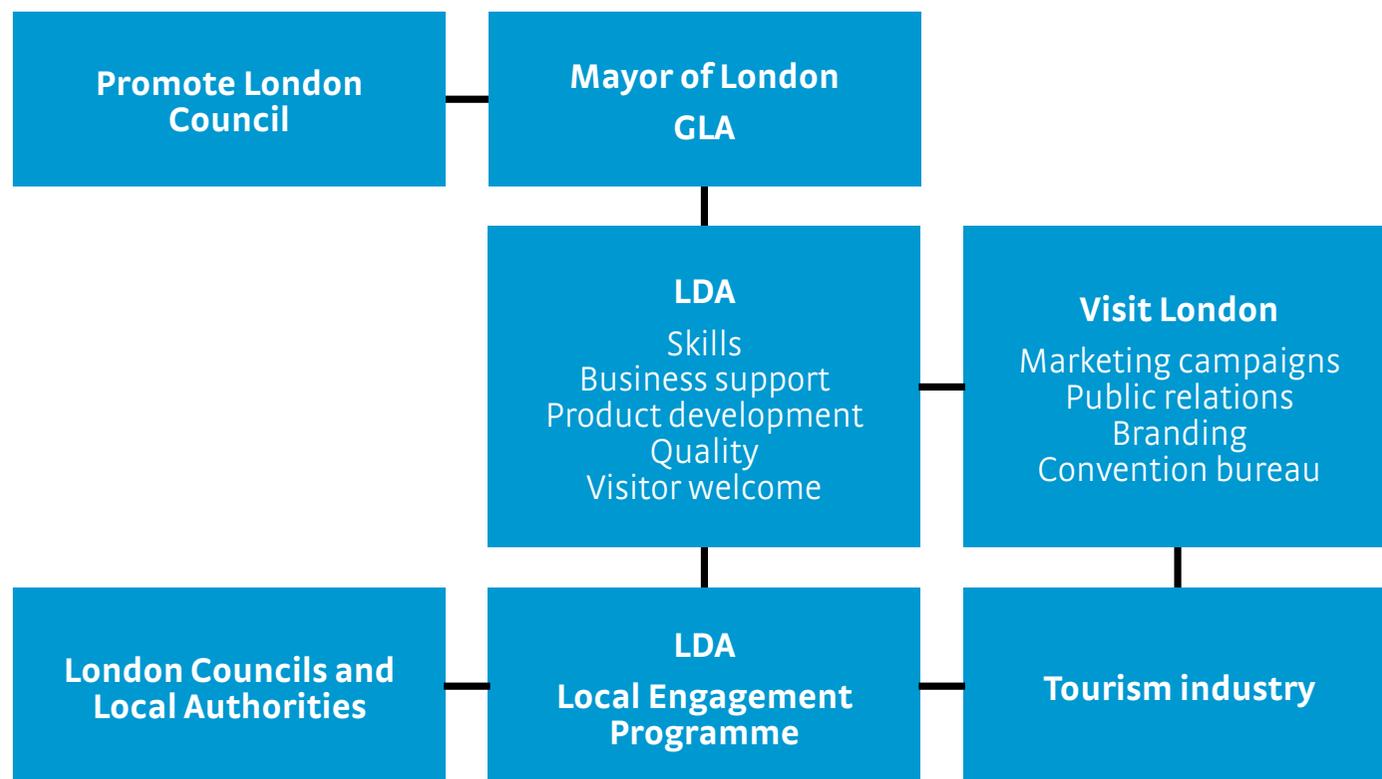
Through the GLA, the Mayor oversees the strategic development of tourism and the delivery of the Mayor's Tourism Action Plan by the LDA. The GLA also champions culture and the arts as well as delivering an events programme.

### London Development Agency

Part of the GLA Group and the Mayor's Agency for jobs, skills and growth. The LDA is one of nine Regional Development Agencies (RDAs) in England funded by central Government to deliver economic development and regeneration priorities. The LDA has overall responsibility for the promotion and development of tourism in London and therefore delivery of the London Tourism Vision and associated London Tourism Action Plans. This responsibility is devolved to the LDA by the Mayor of London and the LDA's performance in this respect is monitored by the GLA. The LDA procures the delivery of all marketing and promotional activities in relation to the new Tourism Vision and Action Plans.

### Promote London Council

The Council will provide focus on how the capital can be promoted to business and as a visitor destination through a new joined-up approach to promoting the capital, in the run-up to the London 2012 Olympic and Paralympic Games. The Council was established in June 2009 and consists of representatives from London's promotional agencies and business groups.



## Visit London

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

## Olympic Legacy Company

A new company will be set up to deliver the legacy in the Lower Lea Valley for the 2012 Olympic and Paralympic Games. It will be jointly owned by the GLA and the Department of Communities and Local Government.

## London Councils

London Councils is a cross-party organisation, funded and run by member Local Authorities. London Councils support the significant role of Local Authorities in destination management by funding Visit London to work with boroughs to promote and develop their tourism offer. London Councils also build capacity on a local and regional level in order to raise volunteering participation levels help develop a skilled and diverse workforce of volunteers in preparation for the Games and support activity in the capital beyond 2012.

## Local Authorities

There are 33 Local Authorities in London. Tourism, as a non-statutory Borough service, is viewed differently across the Local Authorities, however, their statutory functions have a significant impact on the visitor experience. Some Local Authorities have dedicated staff and budget to lead the local tourism agenda while others see tourism as part of their wider regeneration or cultural services role. Many Local Authorities have produced Olympic and Paralympic Games Strategies and Plans to ensure the boroughs take full advantage of the benefits the event will bring.

## Business Improvement Districts (BIDs)

London has 17 BIDs, many at key visitor hot spots. BIDs and other area management organisations have a key role to play in the day to day management of destinations, promotion of the areas and future development plans.

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## National leadership

Nationally, there are other organisations who are important partners in London's visitor economy.

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

This is the Central Government Department that sponsors tourism and the 2012 Games and part-funds the tourism activity of Visit Britain and VisitEngland. The Government Olympic Executive is part of the DCMS and is responsible for co-ordinating the Government's work to ensure that the Games are delivered on time, on budget and benefit the whole of the UK.

### VisitBritain/VisitEngland

VisitBritain promotes all of Britain to the rest of the world. Their mission is to build the value of tourism in Britain. As a result of the British Tourism Framework Review, VisitEngland was created in April 2009 to coordinate the promotion of England to domestic and international visitors. Both VisitBritain and VisitEngland are mainly funded by the Department of Culture, Media and Sport.

### London Organising Committee of the Olympic and Paralympic Games (LOCOG)

LOCOG is the private company that has the responsibility for preparing and staging the 2012 Olympic and Paralympic Games. LOCOG will commission most of the services to deliver and run the Games, including ticket sales.

# Strategic framework for tourism in London



## Strategic plan relationships

The Mayor publishes a range of statutory and non-statutory strategies and plans that create the policy framework within which this Action Plan will be delivered. Key aspects of these plans are set out below.

### The London Plan

The main legal responsibility for planning in London rests with the Mayor and the boroughs. The London Plan, published in 2004 and altered twice since then, is the Mayor's spatial development strategy that sets out planning policies for London's growth based on sound evidence and analysis.

'A New Plan for London – Proposals for the Mayor's London Plan' was published in April 2009 and sets out the Mayor's proposals for London's spatial development strategy. These proposals include: Recognising the specific opportunities and challenges faced by Outer London; continuing to support the rejuvenation of the West End as the UK's primary retail and leisure destination; setting a new London standard for the availability of wheelchair accessible hotel rooms; setting the strategic direction for the Olympic Legacy Masterplan Framework; resisting the provision of further capacity at Heathrow and exploring the potential for alternatives in the South East. The final London Plan will be published in autumn 2011 following an Examination In Public.

### Economic Development Strategy

The Economic Development Strategy (EDS) sets out the Mayor's ambitions for the economic development of the capital; provides the GLA group and other strategic organisations with a clear vision and policy directions for achieving those ambitions. The proposed aims of the strategy, as set out in the consultation document in May 2009, are:

- position and promote London as the undisputed business capital of the world
- ensure that it has the most competitive business environment in the world
- make it a leading global low carbon capital
- give all Londoners the opportunity to share in London's economic success
- invest to ensure growth is spread across London, and in particular outer London

### Mayor's Transport Strategy

The Mayor's Transport Strategy – Statement of Intent was published in May 2009 and represents the initial thoughts on a new transport strategy for London. The Mayor's new Transport Strategy will be published in early 2010. Specific areas that will impact on London's visitor economy include: Delivering Crossrail; tube upgrade programme; ensuring that the public transport system is wheelchair accessible; the acceptance of Oyster Cards at all National Rail stations in London; delivering the London Cycle Hire Scheme; Legible London, a new pedestrian wayfinding system for the capital, and greater use of the River Thames.

### Cultural Metropolis

Published in November 2008, Cultural Metropolis sets out the Mayor's initial vision for culture in the capital and the priorities between 2009 and 2012. Priorities include: Promoting London as a cultural city; creating a lively public realm through events; improving and promoting the cultural provision in outer London; improving coach parking; and ensuring a strong cultural 2012 Olympic and Paralympic cultural legacy.

In addition to the GLA strategies above there a number of other strategies and plans which this Action Plan complements.

### London's Future: The Skills and Employment Strategy for London 2008-2013

The London Skills and Employment Board (LSEB) is responsible for delivering the long-term strategy for adult skills and employment in London. LSEB's first strategy sets out the overall labour market strategy for London. The LDA will work with key partners such as Learning and Skills Councils, Jobcentre Plus, business and Local Authorities to implement this strategy.

The aims of the strategy are to:

- work with employers to better support them in providing more job and skills opportunities to Londoners, to the benefit of their businesses and to keep London's economy competitive
- support Londoners to improve their skills, job and advancement prospects through integrated employment support and training opportunities
- create a fully integrated, customer-focused skills and employment system

### 'Winning: A Tourism Strategy for 2012 and Beyond'

The DCMS launched 'Winning: A Tourism Strategy for 2012 and Beyond' in September 2007. This strategy aims to maximise the potential financial benefits to tourism in the UK of the 2012 Games by:

- improving international perceptions of Britain
- delivering a first class welcome to all visitors
- improving the skills of the workforce
- driving up quality in accommodation
- maximising the opportunities for increasing business visits and events
- spreading the benefits
- improving sustainability

The LDA is responsible for implementing these objectives in the London context.

### London 2012 City Operations Strategic Framework

The Mayor, LOCOG and their partners have agreed the following vision for the London 2012 City Operations programme: "To provide an inspirational, world-class citywide experience for everyone participating in the Games in London, to safeguard the smooth running of London in Games time, and to maximise the opportunities for legacy from this work." The LDA is closely involved in delivering key visitor experience workstreams.



## LDA's role in tourism promotion and development:

The LDA is a functional body of the GLA which works with the Mayor to create sustainable economic development in the capital by:

- driving London's growth and development while supporting a switch to a carbon efficient London
- ensuring all Londoners are able to access this employment by working with business to tackle barriers to employment and progression
- creating the conditions London needs to facilitate business growth, productivity and employment

The LDA delivers benefits for London through investment in six areas.

- Regeneration: making strategic investments that maximise London's economic development
- Climate change: helping London become a world-leading, low carbon capital
- Sustained employment: giving all Londoners the opportunity to take part in London's economic success
- Business support: ensuring London has the most competitive business environment in the world
- International promotion: helping to position London as the business capital of the world
- Olympics: helping London and its communities benefit from the Olympics

To meet these objectives the LDA invests in the marketing and promotion of London as a top international destination. The LDA also invests in improving the coordination and management of London as a destination in order to improve the quality of the visitor experience and ensure we maximise the economic benefits to the city and the quality of life for Londoners.

The LDA's tourism development and promotion responsibility forms a key part of the Global Competitiveness Programme. The Global Competitiveness Programme provides the main source of LDA support for products, services and promotional campaigns that are developed to promote London as the leading global city in which to trade, invest, visit, study and work. Future services in the Global Competitiveness Programme will be secured using the commissioning model that the LDA will apply from 2009/10 onwards. The commissioning model will enable the market to decide how best to achieve the required LDA outcomes and for the LDA to better plan and procure a value for money buying process.



# Key achievements 2006-09



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## Set out below is a summary of some key achievements of the 2006-09 Action Plan which have informed the focus of this Action Plan.

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### A global city

- 'Events for London' established for the purposes of attracting, creating and co-ordinating world-class sporting and cultural events in London. Events for London has helped bring events such as the Tour de France, NFL American Football and London Pride to the streets of the capital
- Visit London re-brand and first ever global advertising campaign ahead of the handover to London at the Beijing 2008 Olympic and Paralympic Games – "See the World, Visit London"
- Visit London's "Village Life" campaign created international press coverage while encouraging domestic visitors to explore the whole of the city.
- In 2007/08, Visit London's marketing campaigns resulted in a direct economic contribution of £488 million through visitor spend, which represented a return on marketing activity of £48 for the city for each £1 invested

### A quality visitor experience

- The LDA's drive to encourage London accommodation to meet minimum quality standards has met its target of 50% growth with over 72,000 hotel rooms in the capital now star-rated

- Delivery of the Visitor Information Provision Plan resulted in the training of over 300 community wardens as London Ambassadors, a trial of new welcome literature at St Pancras International and the piloting of mobile Visitor Info-Bikes along the South Bank
- A new Complaints Service was launched to coordinate responses to visitor complaints and to address the cause of complaints where possible

### A sustainable and inclusive city

- The launch of the Green Tourism for London programme now enables London's tourism businesses to improve their environmental sustainability and be recognised for their efforts
- The new London Open to All programme has published the independently audited details of over 800 wheelchair accessible London hotel rooms on Visit London.com and developed a range of support to encourage tourism businesses become fully accessible to visitors
- The development of Concordats for Coach Tourism and River Passenger Services has provided a framework within which agreed actions can be progressed, such as improved information or investment in infrastructure

### Professionalism at every level

- The final year of the successful Hospitality, Leisure, Travel and Tourism (HLTT) Programme provided training to around 1,400 people and brought new skilled employees into the tourism workforce

- The LDA commissioned a study by People 1<sup>st</sup>, the Sector Skills Council for Hospitality and Tourism, to assess the current customer care provision across all sectors involved in the visitor economy and evaluate the effectiveness of current provision in order to help develop a flexible qualification for those in customer facing roles
- The Personal Best programme has already trained over 800 people in pre-employment skills offering them the opportunity to become a Games-time volunteer at the same time as moving them nearer the labour market through participation in an accredited training course

### Industry support and partnership

- London's first ever tailored tourism business support programme worth £1.65 million over four years was launched in spring 2007, providing targeted help in quality, accessibility, environmental performance and contingency planning. At the end of March 2009, nearly 500 tourism businesses had been assisted in this way
- The LDA has developed the Local Area Tourism Impact model to provide transparent and comparable estimates of tourism volume and value at the borough level, and the London Visitor Survey to better understand visitor perceptions and satisfaction with London as a tourism destination

# Strategic priorities for the London Tourism Action Plan 2009-13



## The 2006-09 Tourism Action Plan laid out the groundwork for the tourism success and legacy benefits of the 2012 Games.

This 2009-13 Action Plan focuses on capitalising on the 2012 Games opportunities, delivering the tourism elements necessary to ensure a successful Games-time experience, and laying the foundations for a post-Games tourism legacy. The Plan also sets out the actions necessary in Year One (2009-10) to assist the city's emergence from the economic downturn in that year.

Our priorities for 2009-13 are to:

- support jobs in London's tourism businesses through targeted marketing campaigns designed to maximise economic impact
- deliver and promote a world class sense of 'Welcome' throughout the visitor experience
- capitalise on the exposure that the 2012 Games and Cultural Olympiad provide to ensure London maintains its position as a leading destination for international leisure and business tourism
- exploit the spotlight of the 2012 Games to maintain and grow London's reputation as a premier global sporting, cultural and business events city

Over the four years of the Plan the key actions that will assist in delivering the above priorities are:

- delivering marketing activity in both leisure and business markets that provide rapid economic return to the city in line with the Mayor's Economic Recovery Plan
- promoting London as a unique destination offering history and heritage alongside a vibrant, ethnically diverse and contemporary culture
- maximising the global media opportunities for a destination focus in 2012
- developing a seamless Host City Welcome in the lead up to and during the 2012 Games that fits with the overall 'Welcome to Britain' programme
- encouraging tourism businesses to become more accessible to those with special access needs
- communicating the range of transport facilities available to visitors across London
- promoting the development and delivery of a World Class customer service standard for 2012 and beyond

The budget assigned to deliver Year One of the Tourism Action Plan (2009-10), within the LDA's Global Competitiveness budget, is set out below. This does not include officer time or salaries.

Theme	2009/10 budget
A global city	
Leisure and business marketing	£16,069,000
Events for London	£2,950,000
A quality visitor experience	£959,000
A sustainable and inclusive city	£360,000
Professionalism at every level	£300,000
Industry support and partnership	£31,000
<b>Total</b>	<b>£20,669,000</b>

# London Tourism Action Plan 2009-13



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## 1. A global city

### London Tourism Vision 2006-16

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

### Strategic Context

The LDA has commissioned Visit London to act as the official destination marketing organisation for the capital. Visit London promotes the city to potential leisure and business and major event organisers as the world's leading visitor destination. Since 2003 Visit London has won 30 awards for its marketing and PR campaigns and its four year contract has now been extended for a further year.

The 2012 Olympic and Paralympic Games provides London with a once in a life time opportunity to showcase the capital to a global audience and advance the city's destination brand. The areas of activity in this section of the Action Plan aim to ensure that London's visitor economy fully capitalises on this opportunity but also to ensure that tourism brings rapid economic return to the city in line with the Mayor's Economic Recovery Action Plan. This requires Visit London to work across a number of territories, including the UK. The details of the marketing campaigns and promotional activities are outlined in Visit London's annual marketing plans. The themes and strategy that will be used to capitalise on the host city status, and the subsequent messages and values that will be used to communicate the post-Games visitor experience will be developed over the early stages of the Plan's lifetime.

At the time of publication, the GLA and LDA are looking more broadly at how London is promoted across a number of publicly funded organisations to ensure maximum efficiency and effectiveness. Once concluded this work could have a beneficial impact on the promotion of London as a visitor destination.



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**The 2012 Olympic and Paralympic Games provides London with a once in a lifetime opportunity to showcase the capital to a global audience and advance the city's destination brand.**

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### 1.1 Market development

Objective: Maintain London's global position as visitor destination by implementing evidence based marketing and PR strategies.

Areas of activity	Years
Continue to promote London to core leisure and business markets (North America, Europe and UK) to maintain and grow market share	1-4
Work closely with national marketing bodies to ensure a sustainable balance of visitors, by market segment, territory, value and volume	1-4
Continue to review the balance of resources allocated to business and leisure activity	1-4
Key year one actions	Partners
Deliver marketing activity in markets that provide rapid economic return to the city in line with the Mayor's Economic Recovery Action Plan	GLA
Utilise the 2012 Games to grow market share in the emerging markets of India, China and Brazil	VisitBritain

### 1.2 Campaign planning and positioning

Objective: Capitalise on the opportunities of the 2012 Olympic and Paralympic Games and the Cultural Olympiad through the delivery of targeted campaigns across relevant markets and position London as a vibrant and diverse 'must see now' destination.

Areas of activity	Years
Integrate sector specific campaign work in markets of greatest potential	1-4
Promote London as a unique destination offering history and heritage alongside a vibrant, ethnically diverse and contemporary culture	1-4
Incorporate the promotion of outer London tourism product in campaigns to encourage a wider distribution of visitors across the capital	1-4
Continue to harness PR across markets to raise profile of London	1-4
Maximise tourism opportunities from London 2012 including displacement strategy and opportunities for non-host areas	2-4
Key year one actions	Partners
Continue to promote Value London, Green London and Unique London with an underlying theme of London 2012 Olympic and Paralympic Games	VisitBritain, VisitEngland, local marketing consortia
Develop a 2012 media relations programme and associated opportunities	Local marketing consortia, Local Authorities
Support the promotion of visitor orientated Cultural Olympiad projects, and other key cultural activities, as part of London's cultural tourism offer	GLA, ACE, Local Authorities, MLA, LOCOG, arts organisations

### 1.3 Branding

Objective: Capitalise on the 2012 Olympic and Paralympic Games to position and advance 'London' as a leading international tourism brand.

Areas of activity	Years
Incorporate the brand values of the London tourism brand model in all tourism marketing activity	1-4
Encourage the tourism industry to utilise the assets of the London brand model	1-4
Work closely with London's overseas offices in China and India to maximise London's brand exposure as a leading visitor destination in these markets	1-4
Explore the potential for a London brand that will resonate with, and enhance, the capital's visitor economy and destination marketing	1-3
Key year one actions	Partners
Continue to improve the brand awareness of London's visitor destination brand	VisitBritain
Capitalise on the opportunity that major events such as Delhi Commonwealth Games, Shanghai Expo and Vancouver Winter Olympics offer London in 2010	tbc

### 1.4 Gateway

Objective: Maximise London's role as a gateway to the rest of the UK.

Areas of activity	Years
Co-ordinate strategic gateway activity to capitalise on London's role as a gateway to the rest of the UK by overseas visitors	1-4
Key year one actions	Partners
Collaborate with VisitBritain to develop and publish an on-line database of London tourism products for a national and international audience	VisitBritain, RTBs

### 1.5 Global host

Objective: Harness the 2012 Olympic and Paralympic Games opportunity to position London as a premier global sporting, cultural and business events city.

Areas of activity	Years
Continue to support the development of London as a major events destination through the Events for London Steering Group and strategy whilst ensuring that the delivery function remains fit for purpose	1-4
Develop a business tourism 2012 legacy	1-3
Support the findings of the International Convention Centre Mayoral Commission and continue to explore funding avenues	1-4
Maximise the opportunities to promote a destination focus to the global media in the run up to 2012 and during Games Time	2-4
Key year one actions	Partners
Tender London as the 2011 host of the Sport Accord, an annual event for all the top officials of the Olympic and non-Olympic International Federations of sport, and other global sports industry stakeholders	UK Sport, UKTI, VisitBritain, RDAs
Launch the London Accommodation Charter for convention bookings and promote the 'Fair Pricing and Practices' strategy for 2012	Visit London, LOCOG
Explore the delivery options of a non-accredited media centre	tbc
Develop an Olympic Park major events plan	Olympic Park Legacy Company, UK Sport, GLA
Pilot and launch a new nationally agreed evaluation methodology of the economic impact of major events	VisitScotland, RDAs, UK Sport
Establish a business tourism value and volume baseline and map out the impact of the sector	tbc
Work with landowners to explore the potential of bringing vacant land in to use for cultural activity or coach parking in the build up and during the Olympics and Paralympics	GLA, Local Authorities, LOCOG

## 2. A quality visitor experience

### London Tourism Vision 2006-16

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

### Strategic context

Tourism activity takes place on a huge scale in London. On an average day during the main tourism season, there are around 400,000 visitors in London.<sup>13</sup> In addition, it is estimated that up to 300,000 Olympic visitors could be in the capital on any one day during the period of the Games. Providing a quality visitor experience is an essential part of creating an enjoyable experience that ultimately encourages repeat visits and promotes increased spend. Robust and impartial visitor information provided at the point the visitor needs it is integral to this tourism experience. LDA research indicates that access to reliable information on the streets of London is highly sought by visitors and the crux to facilitating a quality visitor experience is helping visitors to make informed decisions and make best use of their time. London's dedicated visitor information services are rated as 'good' by visitors. Meeting and exceeding visitor expectations is becoming increasingly important to London as a destination in order to achieve a competitive advantage and will be a key determinant in the success of the 2012 Olympic and Paralympic Games.

The Games will bring unprecedented demands and levels of scrutiny to the capital's visitor services. London will also provide visitors and residents with a different experience during Games time. The London 2012 City Operations Programme aims to "extend an inspirational and world-class Games experience across London, ensuring that everyone is safe, well informed and involved". The LDA will be supporting this aim by:

- bolstering existing dedicated visitor services, such as Tourist Information Centres and TfL Travel Centres
- recognising and supporting the 'welcome' role of existing personnel patrolling the streets, transport gateways and public spaces of London, through programmes such as the London Ambassador Scheme
- developing a Games Time Host City Volunteer Scheme that will help provide a warm welcome and create a volunteering legacy for London
- inspiring all customer facing staff to raise the standard of welcome
- working with Welcome to Britain to ensure the welcome stretches from before the visitor arrives to the point of entry and ultimate departure

The LDA will be working in close partnership with Visit London, Transport for London, Local Authorities, Government Olympic Executive, City Operations Steering Group and VisitBritain.

London has a number of key accommodation clusters, many of which are around key railway stations. These clusters are of varying standards and quality. To ensure that visitors are given an accurate impartial assessment of quality level of accommodation before booking the LDA will be working with Visit London to develop a London quality marque.

The intention is that this marque will recommend properties which achieve core regulatory standards and also minimum standards of cleanliness, maintenance, security, services, hospitality and facilities. Visit London will then use this "Visit London Approved" marque to market accommodation through its web site, and other media, alongside the national schemes. Only accommodation reaching this minimum standard will appear on Visit London.com and other marketing channels. The LDA will continue to encourage providers to get involved with the National Accommodation Quality Standards while working with Visit London on the new marque which will ensure that quality standards reach all market levels.

<sup>13</sup> [Review and Analysis of Tourism to Previous Olympic Destinations Lessons and Implications for London 2012, Kurt Janson Ltd Sept 2007](#)

## 2.1 Visitor information

Objective: Deliver a high quality destination information network creating lasting improvements in visitor information provision and coordination for 2012 and beyond.

Areas of activity	Years
Work with stakeholders to support a dedicated visitor information network that provides high quality information and support at main gateways and key visitor touch points, and utilises innovative delivery methods where appropriate	1-4
Make best use of existing visitor information resources such as Visit London.com	1-4
Establish the requirements for visitor information during the period of the Games and the opportunities following 2012	1-2
Key year one actions	Partners
Continue to support the Britain and London Visitor Centre and deliver training to support the Tourist Information Centre (TIC) network	VisitBritain, Local Authorities
Expand the mobile Tourist Information Network at suitable locations	Local Authorities, Destination Mangers, BIDs
Recognise and support information services that meet minimum criteria as part of London's official information network	BIDs, TfL, Local Authorities, business networks

## 2.2 London’s sense of welcome

Objective: Deliver an inspirational ‘welcome’ in the run up to, and during, the 2012 Games that showcases London to a global audience, adds value to the visitor experience, and leaves a lasting legacy for the city’s visitor economy.

Areas of activity	Years
Develop a seamless Host City Welcome in the lead up to and during the 2012 Games that fits with the overall ‘Welcome to Britain’ programme	1-3
Continue to work with stakeholders to deliver a high quality and coordinated welcome at main gateways and key visitor touch points	1-4
Utilise London’s diverse population to develop and implement an improved visitor welcome including greater use of existing foreign language skills	1-4
Key year one actions	Partners
Scope the need for a volunteer welcome and visitor information service for Games-time and explore the delivery options	LOCOG, GLA, London Councils, GOE
Develop and disseminate impartial ‘Welcome to London’ print at international and domestic gateways to the capital that highlights transport and visitor information options	TfL, Visit London, VisitBritain
Work with partners in Local Authorities, and the transport sector to roll out London Ambassadors to key customer facing staff	Network Rail, TOCs, TfL, Local Authorities
Explore the potential for a community ‘Greeters’ scheme within the 5 Host Boroughs of the Olympic and Paralympic Games	Host Boroughs Unit, Local Authorities
Audit visitor welcome experience at key major transport gateways, highlight best practice and improving areas of weakness	Welcome to Britain

### 2.3 Quality of visitor accommodation

Objective: Seek to improve the quality of accommodation in order to stimulate repeat visits.

Areas of activity	Years
Encourage London's accommodation providers to meet minimum quality standards	1-4
Only promote accommodation which meets minimum standards	2-4
Monitor and follow up complaints to ensure improvements are made, calling on Borough regulatory authorities where necessary	1-4
Key year one actions	Partners
Develop and deliver a London quality marque for the accommodation sector that compliments the existing quality standard schemes	Visit London, Partners for England
Visit London to eliminate non-assessed accommodation from its website and new partner publications by April 2010	Visit London
Increase number of businesses participating in national quality schemes, mainly through personal visits from quality advisors	VisitBritain, AA

### 2.4 Measuring the quality of visitor experience

Objective: Research and monitor the quality of the visitor experience.

Areas of activity	Years
Continue to measure visitor perceptions and satisfaction of London as a visitor destination through the London Visitor Survey (LVS) and disseminate results to partners and stakeholders	1-4
Key year one actions	Partners
Commission delivery of updated LVS for 2009-13	tbc

### 3. A sustainable and inclusive city

#### London Tourism Vision 2006-16

London will move towards becoming a sustainable and inclusive tourism destination: Financially, physically, socially and culturally.

#### Strategic context

Improving the environmental sustainability of London is a key Mayoral priority. Through aviation, tourism is responsible for a significant share of London's total carbon emissions, and the LDA is working to mitigate that impact by influencing the practices of tourism businesses and visitors through our Green Tourism for London programme. We are also encouraging visitors to use sustainable forms of transport including a public cycle hire scheme, and making it easier for visitors to find their way on foot through the Legible London project.

The LDA is supporting the Mayor's objective of improving access to the city for all our visitors, including older people, parents with pushchairs and those with sensory and mobility issues. It is estimated that around 10 million people in the UK, 16 % of the population, are disabled to some extent.<sup>14</sup> We are committed to improving information about the disabled facilities which are now available, and to encouraging businesses to improve their welcome to all. At the time of publication the capital received a 'good' rating on accessibility from visitors but we are committed to raising standards and helping London to deliver on its promise to stage the most sustainable and accessible Olympic & Paralympic Games ever in 2012.

London has one of the world's most extensive public transport systems and further major additions are scheduled before 2012, such as the opening of the East London Line extension and a step-free access improvement programme. Nearly all visitors to London will use public transport at some point during their stay and visitors view it as iconic and part of the city's identity. As a result it is seen as an intrinsic part of the London visitor experience.

The 2008 London Visitor Survey records visitor satisfaction of the quality of public transport as 'good'. Overseas visitors are generally more satisfied than domestic visitors. The cost of public transport receives a 'fair' rating, so there is a need to communicate to visitors how they can get the best value out of the transport system, in line with the London's overall value message. The Visitor Oyster Card is available through an increasing number of channels, including Visit London.com and as part of the UK visa application process in British visa centres in a number of territories. This Plan promotes less visitor dependency on the Underground system and encourages walking, the use of bikes, buses, trains and the River to explore London. It also seeks to ensure that the group coach tourism market, which brings around 2.8 million visitors a year to the capital, operates effectively for the benefit of visitors, operators and residents.<sup>15</sup>

<sup>14</sup> Family Resources Survey 2003-2004, ONS

<sup>15</sup> London Coach Study, 2004, LDA



### 3.1 Sustainability

Objective: Improve the sustainability and environmental performance of London's visitor economy.

Areas of activity	Years
Advise tourism businesses on how to improve their environmental performance	1-4
Key year one actions	Partners
Support the delivery of the Green Tourism for London programme for hotels and its extension to attractions and theatres	Visit London, Considerate Hoteliers, British Hospitality Association, Society of London Theatre/Theatre Management Association, Independent Theatre Council

### 3.2 Accessibility

Objective: Improve the inclusiveness and accessibility of the visitor experience in the run up to, and during, the 2012 Olympic and Paralympic Games.

Areas of activity	Years
Encourage tourism businesses to become more accessible to those with special access needs	1-4
Effectively communicate the physical, economic and social accessibility of London's visitor offer to Londoners and visitors	1-4
Key year one actions	Partners
Develop a Disability Awareness training module as part of the development of a cross sector customer service standard	Institute of Customer Service, DCMS, Accessibility Forum
Increase the number of hotels publishing audited access information on Visit London.com	Visit London
Build the business case for investment by hotels and attractions in accessible facilities and publicise best practice	DCMS, Tourism for All
Publicise the market opportunity through workshops and one annual conference	Visit London, GLA
Undertake further research in to the requirements of disabled visitors	DCMS, GLA
Publish an Open London Guide Book that provides accessibility information on London's visitor attractions and facilities	Tourism for All

### 3.3 Transport and the visitor experience

Objective: Ensure that high quality public transport is central to London's Games time and legacy visitor experience.

Areas of activity	Years
Continue to improve the communication of the range of transport facilities available to visitors across London and the sale of Oyster Cards before and during their visit	1-4
Work with partners to ensure that visitor issues are included in consultations and development plans as key user groups	1-4
Work with Cross London Rail Ltd, industry and stakeholders to minimise disruption to the visitor experience in central London during the construction phase of Crossrail	1-4
Key year one actions	Partners
Support key actions in the River Passenger Services Concordat, including the implementation of the River Thames Pier Plan and improved River Service identities	London River Service, Concordat signatories
Work with TfL and other stakeholders to ensure that visitor needs are embedded in the design and implementation of Legible London	TfL, Local Authorities
Pilot a visitor friendly cultural cycling route	TfL, London Cycling Campaign, Local Authorities
Carry out a feasibility study into operating a coach voucher system for parking in London to improve the visitor, resident and coach operator experience in the capital	London Coach Forum

## 4. Professionalism at every level

### London Tourism Vision 2006-16

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

### Strategic context

The LDA's current strategic focus is on improving basic skills and employability in order to move disadvantaged Londoners into employment as part of a well-trained local workforce. Working as a key stakeholder in the London Skills & Employment Board, we are supporting programmes such as the London Employer Accord, launched in March 2008 to help more than 5000 workless Londoners into jobs. Through the Accord employers open up opportunities to local job seekers in return for a more integrated, responsive and bespoke placement service and the provision of job/training-ready candidates. The tourism and hospitality sector is also benefitting from employment and skills programmes, such as the LDA European Social Fund co-financing

programme. The Mayor has an aspiration that employers in the hospitality sector will embrace the London Living Wage as the minimum standard for employee wages in order to help with retention levels and help promote careers in the sector.

The LDA is focusing its tourism skills support on improving customer service training in the run up to 2012. The success of the Games will depend largely on London's front line staff and their customer service skills. An LDA commissioned report produced by People 1<sup>st</sup> highlighted that 57 % of visitor economy businesses surveyed believed that the customer service skills of their staff could be improved.<sup>16</sup> VisitBritain research has shown that the UK's welcome is perceived poorly in some key markets. The Games can act as a catalyst for improving customer service skills and ultimately improving the quality of the visitor experience.

The LDA will also help to promote other key projects such as apprenticeships and the take up of Train to Gain as well as the work of a number of other organisations that impact on the visitor experience such as People 1<sup>st</sup>, Sector Skills Councils and the Institute of Customer Service. These agencies, operating at a London and national level, play a vital role in providing a world class customer service in the run up to 2012 and beyond.

- In 2008 People 1<sup>st</sup> launched the London Skills Strategy, "Raising the Bar", which aims to improve hospitality, leisure, travel and tourism skills in the capital city. The priorities are chef skills, customer service and management and leadership skills
- The National Skills Academy for Hospitality was launched in early 2009, to design, source and deliver challenging training programmes for the industry
- The quality of a visitor's destination experience is not restricted to the service received in the hospitality and tourism sectors. We will work with Welcome to Britain, other Sector Skills Councils and Skills Academies to ensure 'visitor touch points', such as that transport gateways and sporting venues, provide excellent customer service to boost the visitor welcome

<sup>16</sup> [World Class Customer Service...for 2012 and Beyond, People 1<sup>st</sup>, November 2008](#)

#### 4.1 Access to employment

Objective: Support Londoners into sustained employment with the skills to boost London's customer service.

Areas of activity	Years
Adapt and deliver pre-employment training programmes that progress workless, low skilled candidates to job readiness and into customer care oriented jobs in London's key growth sectors	1-4
Key year one actions	Partners
Work with employers in tourism related sectors demonstrating capacity for entry level vacancy growth, including retail, hospitality and transport, to deliver pre-employment training programmes to workless Londoners	London Employer Accord

#### 4.2 Workforce development

Objective: Ensure that employees within the industry have access to skills that deliver truly world-class customer service in the run up to, and during, the 2012 Games.

Areas of activity	Years
Promote the development and delivery of a World Class customer service standard for 2012 and beyond	1-4
Develop and deliver training units that will provide Londoners with the skills and knowledge to provide world class customer service and welcome in the run up to, and beyond, 2012	1-4
Support the delivery of 'Raising the Bar – Skills Strategy for the Hospitality, Leisure, Travel and Tourism Sector in London'	1-4
Key year one actions	Partners
Work with the Institute of Customer Service to support cross sector training units, including core units and a disability focused unit	Sector Skills Councils, DCMS
Develop a cross sector 'Destination and 2012' training unit that is registered on the Qualifications and Credit Framework	LOCOG, ICS, SSCs, VisitBritain
Deliver inter-cultural skills training to the Tourism and Hospitality industry	Regional Language Network
Promote Advanced Apprenticeships and Good Employers Guides to London employers	National Skills Academy for Hospitality, People 1 <sup>st</sup>

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## 5. Industry support and partnership

### London Tourism Vision 2006-16

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

### Strategic context

The LDA has a key role to play in measuring the economic impact of tourism, and advocating the case for a proactive approach to visitor management to all stakeholders both at regional and at Borough level. We also represent the interests of London in the national debate on tourism policy. We are closely involved with the new national English Tourism Intelligence Partnership (ETIP) in scoping their work to improve the quality of our tourism market statistics.

At the local level in London, the LDA and Visit London share best practice in tourism development with Borough officers and other interested groups, such as Business Improvement Districts. Visit London have a dedicated post, supported by London Councils, to work with boroughs in order that they are able to make the best use of their tourism resources and benefit from Visit London's marketing expertise. The LDA will work with the rest of the GLA Group and with the boroughs to take forward the Mayor's commitment to ensuring

that outer London is realising its full economic potential in relation to tourism. We will work with boroughs and developers to ensure that the growth in the hospitality sector benefits both inner and outer London and that development opportunities capitalise on local access to employment initiatives in order that the local benefit is fully realised. East London and the Lea Valley are a particular focus of our work in planning and supporting tourism development as a key part of the Legacy of the 2012 Games, and we are contributing to the work of the Five Olympic Host Boroughs team.

The LDA has a role to play in helping business to engage and benefit from 2012 related opportunities and providing destination market intelligence as the context for business plans. The LDA will make free destination level information available through its website [www.lda.gov.uk/tourism](http://www.lda.gov.uk/tourism) and procure contracts through the CompeteFor.com website. At a national level the LDA will work with VisitBritain to develop a 2012 tourism network business-to-business website that will keep businesses up to date with relevant 2012 information and opportunities. The LDA support Business Link to provide advice to existing businesses and support those looking to start a new business.

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**The LDA will work with the rest of the GLA Group and with the Boroughs to take forward the Mayor's commitment to ensuring that outer London is realising its full economic potential in relation to tourism.**

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### 5.1 Intelligence

Objective: Continue to deliver accurate and timely intelligence on the tourism industry to stakeholders.

Areas of activity	Years
Continue to deliver the Local Area Tourism Impact (LATI) model and share estimates of tourism value and volume with Boroughs and other destination management organisations to use as a tool to demonstrate the value of tourism	1-4
Continue to work to influence improvements in nationally available statistics through the English Tourism Intelligence Partnership (ETIP)	1-4
Key year one actions	Partners
Refine the methodology used to measure the economic impact of tourism marketing campaigns	ETIP
Establish agreed forecast methodology and data for visitor numbers in the run up to and during Games Time	City Operations Working Group
Maintain an up to date accommodation census and provide data on accommodation stock to boroughs and stakeholders	Visit London

### 5.2 Communication

Objective: Develop and maintain improved communication with the tourism industry.

Areas of activity	Years
Provide strong leadership and communication between GLA, LDA, TfL, Visit London, tourism businesses, business networks and Boroughs on regional and national issues affecting the industry	1-4
Communicate the Olympic and Paralympic opportunity to local tourism businesses	1-4
Represent London's tourism interests to Central Government, directly, and through the RDA Tourism Leads Group, VisitBritain, the new VisitEngland organisation, Partners for England, and the English Tourism Intelligence Partnership	1-4
Key year one actions	Partners
Produce an annual progress report and host a seminar for Borough officers	Visit London, Boroughs, London Councils
Support the use of CompeteFor as the procurement method for Olympic and Paralympic related contracts	LOCOG, ODA, GLA
With RDA tourism leads, influence the development of VisitEngland's strategy and national tourism policies	RDAs, VisitEngland

### 5.3 Co-ordination and support

Objective: Improve co-ordination within the tourism industry to enable improvements in the overall visitor experience in London.

Areas of activity	Years
Work with Local Authorities, tourism partnerships and other key partners to highlight the tourism benefits of the London Games and increase community support for tourism in the run up to 2012	1-4
Work with Local Authorities and tourism and regeneration partnerships to ensure tourism plays an appropriate role in the economic development of inner and outer London	1-4
Key year one actions	Partners
Work with the Host Boroughs to ensure a quality visitor experience in the run up to and during the Olympic and Paralympic Games, in line with the Strategic Regeneration Framework	Host Borough Unit, Local Authorities
Work with street markets to further develop their appeal as visitor attractions	Local Authorities, ATCM, BIDs, marketing partnerships
Set out new arrangements for a Local Tourism Engagement Network	London Councils, Local Authorities, BIDs
Develop an on line events calendar for planning and promotional purposes	Visit London

### 5.4 Hotel development

Objective: Facilitate a structured approach to accommodation development in London.

Key Areas of activity	Years
Work with partners to explore the potential for appropriate hotel development in Outer London, 'Areas of Intensification and Opportunity' and create links to local employment opportunities	1-4
Key year one actions	Partners
Host a seminar on Planning for Visitor Accommodation and produce best practice guidance	GLA, Local Authorities, Developers

# Measures of success



This Tourism Action Plan has a four year life span from 2009-13. Specific actions will be updated annually but the success of the Plan will be measured against the indicators set out below. The actual targets will also be updated annually and available on the LDA website.

Objective	Indicator	Measure
<b>A global city</b>		
Grow economic benefit to London directly attributable to marketing investment	Total economic benefit (£)	Return on Investment Methodology (ROI)
Grow return on Investment on total LDA grant (X:1)	ROI figures	ROI Methodology
Position 'Visit London' as the leading London tourism brand	Percent awareness of 'Visit London' brand	London Visitor Survey
Grow usage of Visit London.com	Unique website users	Visit London web statistics
<b>A quality visitor experience</b>		
Increase number of quality assessed tourism products	Number of rooms quality assessed	National Quality Accommodation Standards and Visit London Marque
Maintain or improve visitor satisfaction levels	Percent visitors rating satisfaction with London as very good or excellent	London Visitor Survey
Improve performance of Tourist Information Centre network	Customer service standard rating	National TIC Mystery Shopping exercise
<b>A sustainable and inclusive city</b>		
Increase number of accessible accommodation rooms listed on Visit London.com	Number accommodation rooms with wheelchair access	Direct Enquiries audits and Visit London.com listings
Improve environmental performance of tourism businesses	Number tourism businesses supported to improve environmental performance	Business support programme
<b>Professionalism at every level</b>		
Improve the quality of Customer Service across the visitor economy	Number of employees receiving LDA supported customer service training	Monitoring Customer Service programme
Support employment access to the Hospitality sector	Number of unemployed people into sustained employment	London Employer Accord monitoring
<b>Industry support and partnership</b>		
Maintain well supported visitor economy	Number of tourism businesses receiving business support	Business support programme

# Appendix – Abbreviations

AA	Automobile Association	LCC	London Cycling Campaign	SSCs	Sector Skills Councils
ACE	Arts Council England	LDA	London Development Agency	SoLT	Society of London Theatre
ATCM	Association of Town Centre Management	LOCOG	London Organising Committee of the Olympic and Paralympic Games	TBC	To Be Confirmed
BHA	British Hospitality Association	LRS	London River Service	TfL	Transport for London
BIDs	Business Improvement Districts	LSEB	London Skills and Employment Board	TIC	Tourism Information Centre
DCMS	Department of Culture, Media and Sport	LVS	London Visitor Survey	TOCs	Train Operator Companies
EDS	Economic Development Strategy	MLA	Museums, Libraries and Archives Council	TMA	Theatre Management Association
ETIP	English Tourism Intelligence Partnership	NAS	National Accessibility Standards	UNWTO	United Nations World Tourism Organisation
GLA	Greater London Authority	NQAS	National Quality Accommodation Standards	VB	VisitBritain
GOE	Government Olympic Executive	NSAH	National Skills Academy for Hospitality	VE	VisitEngland
HLTT	Hospitality, Leisure, Travel and Tourism	ODA	Olympic Delivery Authority	VFR	Visiting Friends and Family
ICS	Institute of Customer Service	RDA	Regional Development Agencies	VL	Visit London
IOC	International Olympic Committee	RLN	Regional Language Network		
ITC	Independent Theatre Council	ROI	Return on Investment		
LATI	Local Area Tourism Impact Model	RTBs	Regional Tourist Boards		

# Glossary

## Central Activities Zone

The Central Activities Zone, as set out in the London Plan, covers parts of Westminster, the City, Camden, Kensington and Chelsea, Southwark, Lambeth, Wandsworth and small parts of Hackney and Tower Hamlets. The policies connected to the Zone focus on London's linkages with the UK and the world, in particular through business, retail, tourism and culture.

## Concordat

A voluntary agreement that sets out the framework for co-operation between organisations. The Coach Tourism Concordat and Passenger River Services Concordat are referred to in this plan.

## Cultural Olympiad

The four-year programme of cultural activity that precedes the Olympic and Paralympic Games. The London Cultural Olympiad started in September 2008.

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

The DCMS is responsible for Government policy on the arts, sport, the National Lottery, tourism, libraries, museums and galleries, broadcasting, film, the music industry, press freedom and regulation, licensing, gambling and the historic environment. DCMS is also responsible for the listing of historic buildings and scheduling of ancient monuments, the export licensing of cultural goods, the management of the Government Art Collection and for the Royal Parks Agency.

## Emerging Markets

The emerging markets refer to the LDA and GLA's international promotion activity in China and India.

## Host Boroughs

The borough that will host the 2012 Olympic and Paralympic Games are Greenwich, Hackney, Newham, Tower Hamlets and Waltham Forest

## Global Competitiveness

This refers to the work of the LDA in promoting London internationally as a place to study, visit, do business and invest.

## Greater London Authority Group (GLA Group)

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

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

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

### London Development Agency (LDA)

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

### London Employer Accord

The Accord is a venture that started in 2008 to bring together employment and skills organisations across the capital to align the skills of local people with the needs of business. Its aim is to build value-added relationships between employers and publicly funded bodies in the field of employment and skills, in order to give the employer the staff they need in a cost-effective manner, and help disadvantaged Londoners get and progress in work.

### London Skills and Employment Board

The London Skills and Employment Board is chaired by the Mayor of London and is employer-led. The Board is tasked with developing a strategy for adult training in London and ensuring its implementation.

### National Quality Standards

These standards recognise and differentiate levels of facilities and services offered by accommodation providers and promote these to customers before they book.

### Qualification Credit Framework

A new way of recognising achievement through the award of credit for units and qualifications at a national level.

### Small and medium size enterprise (SME)

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

Micro – Businesses with less than 10 employees with a turnover of under €2 million

Small – Businesses with less than 50 employees with a turnover of under €10 million

Medium – Businesses with less than 250 employees with a turnover of under €50 million

### Sustainable development

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

### VisitBritain

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

### VisitEngland

The organisation created in 2008 to coordinate the promotion of England to domestic and international visitors.

### Visiting Friends and Relatives (VFR)

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

### Visit London

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

1. Mayor's foreword    2. Background    3. The importance of tourism    4. Leadership in tourism    5. Strategic framework for tourism in London  
6. Key achievements 2006-09    7. Strategic priorities for the Plan    8. London Tourism Action Plan 2009-13    9. Measures of success    10. Abbreviations    11. Glossary

For further information on how the LDA can provide business support, jobs and training please visit [www.lda.gov.uk](http://www.lda.gov.uk)

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Translated versions of this document are available on request.

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