



Open Spaces and City Gardens

Date: MONDAY, 4 FEBRUARY 2019
Time: 11.30 am
Venue: COMMITTEE ROOM - 2ND FLOOR WEST WING, GUILDHALL

Members: Graeme Smith (Chairman)
Oliver Sells QC (Deputy Chairman)
Alderman Ian Luder
Wendy Mead
Barbara Newman
Jeremy Simons
Deputy John Tomlinson
Deputy Philip Woodhouse (Ex-Officio Member)
Karina Dostalova (Ex-Officio Member)
Anne Fairweather (Ex-Officio Member)
Caroline Haines

Enquiries: Richard Holt
Richard.Holt@cityoflondon.gov.uk

Lunch will be served in the Guildhall Club at 1pm

N.B. part of this meeting may be subject to audio-visual recording

John Barradell
Town Clerk and Chief Executive

AGENDA

Part 1 - Public Agenda

1. **APOLOGIES**
2. **MEMBERS' DECLARATIONS UNDER THE CODE OF CONDUCT IN RESPECT OF ITEMS ON THE AGENDA**
3. **MINUTES**
To agree the public minutes and non-public summary of the meeting held on the 10th of December 2018.

For Decision
(Pages 1 - 10)

4. **ACTIONS**
Report of the Town Clerk.

For Information
(Pages 11 - 12)

5. **ANNUAL REVIEW OF TERMS OF REFERENCE**
Report of the Town Clerk.

For Decision
(Pages 13 - 16)

Open Spaces

6. **BREXIT UPDATE**
Director of Open Spaces to be heard.

For Information

7. **CITY OF LONDON VISITOR STRATEGY 2019/23**
Report of the Town Clerk.

For Information
(Pages 17 - 46)

City Gardens

8. **CITY GARDENS MANAGER UPDATE**
Report of the Director of Open Spaces.

To be read in conjunction with a non-public appendix listed at agenda item 12.

For Information
(Pages 47 - 52)

9. **QUESTIONS ON MATTERS RELATING TO THE WORK OF THE COMMITTEE**
10. **ANY OTHER BUSINESS THAT THE CHAIRMAN CONSIDERS URGENT AND WHICH THE COMMITTEE AGREE SHOULD BE CONSIDERED**

Part 2 - Non-Public Agenda

11. **EXCLUSION OF THE PUBLIC**
MOTION: That under Section 100A(4) of the Local Government Act 1972, the public be excluded from the meeting for the following items of business on the grounds that they involve the likely disclosure of exempt information as defined in Part I of Schedule 12A of the Local Government Act.

For Decision
12. **NON-PUBLIC MINUTES**
To agree the non-public of the meeting held on the 10th of December 2018.

For Decision
(Pages 53 - 54)
13. **NON-PUBLIC ACTIONS**
Report of the Town Clerk.

For Information
(Pages 55 - 56)
14. **NON-PUBLIC APPENDIX 2 CITY GARDENS MANAGER'S UPDATE**
Report of the Director of Open Spaces.

For Information
(Pages 57 - 58)
15. **QUESTIONS ON MATTERS RELATING TO THE WORK OF THE COMMITTEE**
16. **ANY OTHER BUSINESS THAT THE CHAIRMAN CONSIDERS URGENT AND WHICH THE COMMITTEE AGREE SHOULD BE CONSIDERED WHILST THE PUBLIC ARE EXCLUDED**

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OPEN SPACES AND CITY GARDENS Monday, 10 December 2018

Minutes of the meeting of the Open Spaces and City Gardens held at Committee Room - 2nd Floor West Wing, Guildhall on Monday, 10 December 2018 at 11.30 am

Present

Members:

Graeme Smith (Chairman)
Oliver Sells QC (Deputy Chairman)
Alderman Ian Luder
Wendy Mead
Jeremy Simons
Deputy Philip Woodhouse (Ex-Officio Member)
Caroline Haines

Observers:

Catherine Bickmore (West Ham Park Committee)

Officers:

Alistair MacLellan	- Town Clerk's Department
Alison Elam	- Chamberlain's Department
Michael Radcliffe	- City Surveyor's Department
Colin Buttery	- Director of Open Spaces & Heritage
Martin Rodman	- Superintendent of Parks & Gardens
Gerry Kiefer	- Open Spaces Department
Patrick Hegarty	- Open Spaces Department
Jake Tibbetts	- City Gardens Manager

1. APOLOGIES

Apologies were received from Barbara Newman, Deputy John Tomlinson, Karina Dostalova and Anne Fairweather.

2. MEMBERS' DECLARATIONS UNDER THE CODE OF CONDUCT IN RESPECT OF ITEMS ON THE AGENDA

Oliver Sells QC declared a non-pecuniary interest in Item 7 (Proposed NNR Status for Coulsdon Commons and Happy Valley) by virtue of the fact his brother Andrew Sells was the Chairman of Natural England.

3. MINUTES

RESOLVED, that the public minutes and non-public summary of the meeting held on 16 July 2018 be approved as a correct record.

Matters Arising

Resolution to the Planning and Transportation Committee regarding Inner Temple Gardens Planning Application

The Town Clerk noted that this resolution had been noted by the Planning and Transportation Committee at its meeting in July 2018.

Resolution to the Planning and Transportation Committee regarding Finsbury Circus – Closure of Highway to Vehicle Access

The Town Clerk noted that a resolution to the Planning and Transportation Committee regarding the continued closure of Finsbury Circus Garden was pending. Members therefore agreed to submit an updated resolution to the Planning and Transportation Committee, noting that given the section of highway between Finsbury Circus and Moorgate had been closed for over six years due to Crossrail, and in light of the delay to the opening of Crossrail until 2020 at the earliest, it was the view of the Open Spaces and City Gardens Committee that the section of highway should remain closed to vehicles once Crossrail had vacated Finsbury Circus, to provide some pedestrian amenity.

RESOLVED, that the views of the Open Spaces and City Gardens Committee regarding the potential to close the section of highway between Finsbury Circus and Moorgate in order to create some pedestrian amenity be communicated to the Planning and Transportation Committee.

4. BREXIT UPDATE

The Director of Open Spaces was heard regarding implications of Brexit for the Directorate of Open Spaces and the following points were made.

- The Director of Open Spaces noted that the Open Spaces Department was currently in receipt of £300,000 of EU grant funding for its natural land, primarily that used to graze cattle i.e. Epping Forest and Burnham Beeches. The impact of Brexit on this funding would be mitigated via the Agriculture Bill 2017-19 currently before Parliament, although it was likely that the City's continuing eligibility for grant funding would be subject to negotiation.
- The Director of Open Spaces added that Open Spaces staff who were EU nationals would have their right to work in the UK affected by Brexit and that he was working with the Human Resources Directorate to mitigate this.

RESOLVED, that the update be noted.

5. REVENUE & CAPITAL BUDGETS - OPEN SPACES & CITY GARDENS 2018/19 & 2019/20

Members considered a joint report of the Chamberlain and Director of Open Spaces regarding Revenue & Capital Budgets – Open Spaces & City Gardens 2018/19 & 2019/20 and the following points were made.

- The Chamberlain noted that the aims of the report were twofold – the Committee was asked to approve its own budget for Open Spaces and City Gardens, and to review in its strategic capacity the provisional 2019/20 revenue budgets for the services overseen by other Open Space Service Committees.

RESOLVED, that Members

- Approve the provisional 2019/20 revenue budget for the Directorate, Bunhill Fields and City Gardens for submission to the Finance Committee;
- Note the provisional 2019/20 revenue budget for the services overseen by the other Open Space Service Committees;
- Authorise the Chamberlain, in consultation with the Director of Open Spaces, to revise these budgets to allow for any further implications arising from Corporate Projects, departmental reorganisations and other reviews, and changes to the Additional Works Programme. Any changes over £50,000 would be reported to Committee.
- Delegate to the Chamberlain any minor budget changes for 2018/19 and 2019/20 as a result of the completion of the asset verification exercise.
- Approve the draft Capital and Supplementary Revenue budget.

6. TREE PESTS AND DISEASES: OAK PROCESSIONARY MOTH URGENT UPDATE

Members considered a report of the Director of Open Spaces regarding Tree Pests and Diseases: Oak Processionary Moth (OPM) and the following points were made.

- The Director of Open Spaces noted that the progress of OPM had been monitored for the past three years. It has first appeared on Hampstead Heath on the City's Open Spaces and was now present across all 33 of London's local authorities. There had been exponential growth of OPM during 2018, which the City was addressing via a risk-based zonal model which cost £100,000. In future years the costs would increase dramatically as the reported incidents of OPM continued to increase, particularly in Epping Forest. The Open Spaces Directorate would be making a bid under the City's Medium-Term Financial Plan for further funding to address the issue. The City would continue to work with partners such as the Forestry Commission and Department for Environment, Food & Rural Affairs (DEFRA).
- A Member noted that when OPM first arose as an issue on City Open Spaces, the then Open Spaces Chairman had, in response to a Court Question, noted that the Chamberlain was committed ensuring the financial implications of OPM would be a central City responsibility rather than being met from the Open Spaces' Directorate's local risk. This should be factored into the Directorate's Medium-Term Financial Plan bid.

- In response to a question from a Member regarding the risks posed by other pests, the Director of Open Spaces noted that OPM posed a significantly greater risk compared to its peers and that other pests were more manageable by comparison.
- In response to a question from a Member regarding the extent of joint working with partners, the Director of Open Spaces noted that he chaired the national-level Oak Processionary Moth Working Party which included representatives from DEFRA, health services and the Forestry Commission. Health services were included as OPM posed a public health issue given the caterpillars could cause allergic reactions and respiratory issues.
- In response to a question from a Member regarding what action was necessary, and what stage at which a change in strategy would be appropriate, the Director of Open Spaces noted that the current growth of OPM was exponential at the present time, but it would plateau. Therefore resources to address the issue were being targeted at areas of higher public risk such as car parks, public paths and catering facilities. It would be necessary to continue to educate the public on OPM and its nature and spread.

RESOLVED, that Members,

- Note the challenging position regarding the spread of Oak Processionary Moth (OPM) and the partnership work being undertaken with the Forestry Commission.
- Note that the cost of risk based OPM control undertaken in 2018/19 is likely to lead to a small departmental overspend at the year-end.
- Approve the submission of a bid for additional resources to Resource Allocation Sub Committee for future financial years from 2019/20, highlighting OPM as a new and significant resource demand in the medium-term financial planning process.

7. PROPOSED NNR STATUS FOR THE COULSDON COMMONS AND HAPPY VALLEY

Members considered a report of the Superintendent of The Commons regarding Proposed National Nature Reserve (NNR) status for the Coulsdon Commons and Happy Valley and the following points were made.

- The Director of Open Spaces noted that this was a once in a generation opportunity to establish a new NNR, and the work undertaken to date was a good example of joint working between the City, Croydon and other local partners.
- In response to a question from a Member, the Director of Open Spaces confirmed that talks continued between all relevant parties to finalise the bid including the proposed name of the potential NNR.

- In response to a question from a Member regarding the long-term commitment of Croydon to the NNR proposal in light of funding pressures facing local government, the Director of Open Spaces replied that Croydon had undergone a process to review all of its landholdings and had based its support on the proposal to date on evidence of strong local passion for the NNR area.
- In response to a question from a Member, the Director of Open Spaces confirmed that Croydon was dedicating an appropriate level of resource to the maintenance of Happy Valley.

RESOLVED, that Members,

- Authorise Officers to progress the National Nature Reserve proposal for Coulsdon Commons and Happy Valley with Natural England and the London Borough of Croydon so that a formal proposal can be developed and reported to Committee by May 2019.

8. **HEALTH & SAFETY IN THE OPEN SPACES DEPARTMENT**

Members considered a report of the Director of Open Spaces regarding Health & Safety in the Open Spaces Department.

RESOLVED, that the report be noted.

9. **DEPARTMENTAL BUSINESS PLAN 2018/19 - SIX MONTH PERFORMANCE UPDATE**

Members considered an update report of the Director of Open Spaces regarding the Open Spaces Departmental Business Plan 2018/19 – Six-month performance.

RESOLVED, that Members,

- Note the progress made against the 2018/19 Business Plan objectives, projects and performance indicators.

10. **CITY GARDENS UPDATE**

Members considered an update report of the Superintendent of Parks & Gardens regarding City Gardens and the following points were made.

- The City Gardens Manager noted that the hot weather had prompted a challenging summer season for the City Gardens Team, nevertheless the City Gardens had been in receipt of a Gold Award from RHS London in Bloom, and overall category winner in the Town Category. Postman's Park was awarded Gold and was overall winner in the Churchyard Category. Moreover, in the National RHS Britain in Bloom competition, the team achieved Gold in the Town Category, being the only London entry to achieve that level.

- In response to a question from a Member, the City Gardens Manager confirmed that the City Gardens Team was in daily contact with the City's rough sleeping team.
- The Chairman welcomed the work and support provided by the Friends of City Gardens, particularly at St Michael Cornhill. The Chairman also welcomed the encouraging work on projects outlined within the report.

RESOLVED, that the report be received.

11. **VOLUNTARY SMOKE-FREE SPACE IN FINSBURY CIRCUS**

Members considered a report of the Director of Community and Children's Services regarding a voluntary smoke-free space in Finsbury Circus and the following points were made.

- The Superintendent noted that he was supportive of the proposal in principle but that it posed a problem regarding the future letting of the planned Finsbury Circus pavilion, given that any tenant would likely welcome the flexibility to offer a wine bar with an associated smoking area – this would make it anomalous to have a voluntary smoking ban.
- The Superintendent added that, whilst any smoke free area would not be formally enforced, it would nevertheless pose challenge to Open Spaces staff if they were approached by members of the public querying why any smoking was taking place in a smoke free zone. Ultimately, his staff were gardeners and not enforcement officers.
- In response to questions from Members over the potential to discourage smoking in Finsbury Circus, the Superintendent agreed to include the potential for some form of smoke-free space in the Finsbury Circus project going forward. He noted that he would welcome more evidence upon which to make a further recommendation to Members.
- Members were supportive of the proposal for a voluntary smoke free space in principle but also mindful of the challenges this posed in terms of the effective marketing the future pavilion to prospective tenants, and appropriate levels of enforcement. Members requested that the Superintendent work with the Department of Community and Children's Services to evaluate, as part of the Finsbury Circus Reinstatement project, whether a voluntary smoke free space could be included in Finsbury Circus, and furthermore to evaluate any impact of requiring a voluntary smoke-free clause within the letting terms of the Pavilion café, once that stage of the project has been reached.

RESOLVED, that the creation of a voluntary smoke free green space in Finsbury Circus be approved in principle, pending further evaluation of the proposal as part of the Finsbury Circus Reinstatement project.

12. **BREWERS' HALL GARDEN REDEVELOPMENT**

Members considered a report of the Director of Open Spaces regarding the Brewers' Hall Garden Redevelopment and the following points were made.

- Members noted their concern at the proposed loss of a tree under the existing proposals. A Member noted in particular that the proposals saw an additional two floors being added to the Hall, and it was unclear why the entrance could not be designed into another corner of the Hall on its eastern side. Members felt that the impact of the proposals should be either neutral or beneficial to existing Open Space.
- The Chairman summarised discussion, noting that Members would need to be convinced that the project had a beneficial impact on the City's Open Space, not include the loss of a tree, include more green space where possible, and that reconfiguration of existing design, where possible, would be welcome.

RESOLVED, that Members,

- Confirm, subject to comments made, that they would be willing to allow the redevelopment of Brewer's Hall Garden to facilitate access to a new entrance opening onto the Garden from the Hall.
- Subject to those comments being taken into account, authorise officers to negotiate with the Worshipful Company of Brewers to develop the terms and licence arrangements under which the re-design and installation of the garden could take place and report back to Members on the outcome of those negotiations.

13. **UNSPENT S106 FUNDS FOR SEETHING LANE GARDEN**

Members considered a report of the Director of Open Spaces regarding unspent s106 funds for Seething Lane Garden and the following points were made.

- The Director of Open Spaces noted that the proposal to purchase cleansing equipment for the Garden arose from the fact it was frequented by night staff on duty at a nearby hotel and contractors from nearby development sites, causing additional wear and staining of the new surfacing.

RESOLVED, that Members,

- Approve the use of the £11,481 left over funds received for the Seething Lane Garden Estimated Soft Landscaping Works Costs, of the 10 Trinity Square S106 Agreement, for the purchase of equipment to assist with the maintenance of paving in the City Gardens.

14. **GATEWAY 7 - SEETHING LANE GARDEN**

Members considered a Gateway 7 Outcome report of the Director of Open Spaces regarding Seething Lane Garden.

RESOLVED, that the lessons learned be noted and the project closed.

15. **GATEWAY 7 - ST OLAVE'S CHURCHYARD, HART STREET, EC3**

Members considered a Gateway 7 Outcome report of the Director of Open Spaces regarding St Olave's Churchyard, Hart Street, EC3. The Director of Open Spaces noted that the project had been award-winning, and that unused monies would revert to the Church.

RESOLVED, that the lessons learned be noted and the project closed.

16. **QUESTIONS ON MATTERS RELATING TO THE WORK OF THE COMMITTEE**

There were no questions.

17. **ANY OTHER BUSINESS THAT THE CHAIRMAN CONSIDERS URGENT AND WHICH THE COMMITTEE AGREE SHOULD BE CONSIDERED**

There was no other business.

18. **EXCLUSION OF THE PUBLIC**

RESOLVED, that under Section 100A (4) of the Local Government Act 1972 the public be excluded from the following items of business on the grounds they involve the likely disclosure of exempt information as defined in Part I of Schedule 12A of the Local Government Act.

19. **NON-PUBLIC MINUTES**

RESOLVED, that the non-public minutes of the meeting held on 16 July 2018 be approved as a correct record.

20. **MINUTES - FINSBURY CIRCUS GARDEN REINSTATEMENT WORKING GROUP**

RESOLVED, that the non-public minutes of the Finsbury Circus Garden Reinstatement Working Group meeting held on 15 November 2018 be received.

21. **CITY GARDENS UPDATE: NON-PUBLIC APPENDIX**

RESOLVED, that the non-public appendix to Item 10 (City Gardens Update) be received.

22. **RENNIE GARDEN, BLACKFRIARS ROAD SE1 - LICENCE FOR WORKS & 150-YEAR LEASE (BRIDGE HOUSE ESTATES)**

Members considered a report of the City Surveyor regarding Rennie Garden, Blackfriars Road SE1 – Licence for Works & 150-year lease (Bridge House Estates).

23. **QUESTIONS ON MATTERS RELATING TO THE WORK OF THE COMMITTEE**

There were no questions.

24. ANY OTHER BUSINESS THAT THE CHAIRMAN CONSIDERS URGENT AND WHICH THE COMMITTEE AGREE SHOULD BE CONSIDERED WHILST THE PUBLIC ARE EXCLUDED

There was no other business.

The meeting ended at 12.35 pm

Chairman

Contact Officer: Alistair MacLellan / alistair.maclellan@cityoflondon.gov.uk

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Open Spaces and City Gardens Committee

Public Actions Sheet

Action Number	Date	Action	Responsible Officer	Progress Update
1/2018/P	10 December 2018	Resolution to be submitted to Planning and Transportation Committee regarding potential stopping up of highway between Finsbury Circus and Moorgate.	Alistair MacLellan (Town Clerk's Department)	Resolution presented to January meeting of the Planning & Transportation Committee
2/2018/P	10 December 2018	Court response regarding central financial support for managing OPM to be referenced in Medium-Term Financial plan bid.	Colin Buttery (Director of Open Spaces)	Medium Term Financial Plan report presented to joint RASC/E&P and P&R. Appendices were incomplete and OPM was missing as were some other items. No decision made and new report due in Feb and officers will pursue inclusion of OPM.
3/2018/P	10 December 2018	Finalised National Nature Reserve proposal for Coulsdon Commons and Happy Valley to be reported to Committee in May 2019.	Colin Buttery (Director of Open Spaces)	Report to be brought to Committees in May.
4/2018/P	10 December 2018	Members requested that the Superintendent work with the Department of Community and Children's Services to evaluate, as part of the Finsbury Circus Reinstatement project, whether a voluntary smoke free space could be included in Finsbury Circus.	Martin Rodman (Superintendent of Parks & Gardens)	The Superintendent will evaluate the impact of the voluntary smoke free option within the letting terms of the Pavilion Café (which cannot be undertaken until tendering/pre-tender discussions)

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Committee(s) Open Spaces and City Gardens	Dated: 4 February 2019
Subject: Terms of Reference	Public
Report of: Town Clerk	For Decision
Report author: Richard Holt – Town Clerk’s Department	

Summary

As part of the post-implementation review of the changes made to the City Corporation’s governance arrangements in 2011, it was agreed that all Committees should review their terms of reference annually. This is to enable any proposed changes to be considered in time for the annual reappointment of Committees by the Court of Common Council.

The terms of reference of the Open Spaces and City Gardens Committee are attached at Appendix 1 to this report for Members’ consideration.

Recommendations

It is recommended that:

- the terms of reference of the Open Spaces and City Gardens Committee, subject to any comments, be approved for submission to the Court of Common Council in April, and that any further changes required in the lead up to the Court’s appointment of Committees be delegated to the Town Clerk in consultation with the Chairman and Deputy Chairman; and
- Members consider whether any change is required to the frequency of the Committee’s meetings.

Appendices

- Appendix 1 – Terms of Reference

Richard Holt

Committee and Member Services Officer
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BOWMAN, Mayor	RESOLVED: That the Court of Common Council holden in the Guildhall of the City of London on Thursday 19th April 2018, doth hereby appoint the following Committee until the first meeting of the Court in April, 2019.
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OPEN SPACES & CITY GARDENS COMMITTEE

1. **Constitution**
A Non-Ward Committee consisting of,
 - eight Members elected by the Court of Common Council, at least one of whom shall have fewer than five years' service on the Court at the time of their appointment
 - the following ex-officio Members:-
 - the Chairman and Deputy Chairman of the Epping Forest & Commons Committee
 - the Chairman and Deputy Chairman of the Hampstead Heath, Highgate Wood & Queen's Park Committee

2. **Quorum**
The quorum consists of any five Members.

3. **Membership 2018/19**
 - 1 (1) Caroline Wilma Haines, *for one year*
 - 8 (4) Wendy Mead, O.B.E.
 - 6 (3) Jeremy Lewis Simons
 - 6 (2) Barbara Patricia Newman, C.B.E.
 - 2 (2) Oliver Sells, Q.C.
 - 2 (2) John Tomlinson, Deputy
 - 8 (1) Ian David Luder J.P., Alderman
 - 5 (1) Graeme Martyn Smith

together with the ex-officio Members referred to in paragraph 1 above.

4. **Terms of Reference**
To be responsible for:-
 - (a) The allocation of grants in relation to Open Spaces taking account of any views or recommendations expressed by the Epping Forest and Commons Committee, West Ham Park Committee or Hampstead Heath, Highgate Wood and Queen's Park Committee as relevant;
 - Open Spaces**
 - (b) dealing with, or making recommendations to the Court of Common Council where appropriate, all matters relating to the strategic management (e.g. policy, financial and staffing) of the City of London Corporation's open spaces where such matters are not specifically the responsibility of another Committee; and
 - (c) the appointment of the Director of Open Spaces (in consultation with the Port Health and Environmental Services Committee);
 - City Open Spaces**
 - (d) the management and day-to-day administration of the gardens, churchyards and open spaces in the City under the control of the Common Council, together with Bunhill Fields Burial Ground;
 - (e) arrangements for the planting and maintenance of trees and other plants and shrubs in open spaces and in footpaths adjacent to highways in the City;
 - (f) advising on applications for planning permission relating in whole or in part to the gardens, churchyards or open spaces in the City under the control of the Common Council; and
 - (g) the functions of the Common Council under the Local Government (Miscellaneous Provisions) Act 1976 to make safe by felling, or otherwise, dangerous trees in the City generally on receipt of notices served on the City of London Corporation in the circumstances set out in Section 23 of the Act and where trees are in danger of damaging property.

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Committee(s)	Dated:
Culture, Heritage and Libraries – For Decision Policy & Resources Committee – For Decision Planning and Transportation – For Information Barbican Board – For Information Open Spaces and City Gardens – For Information Guildhall School of Music & Drama Board – For Information Cultural Mile Working Party – For information Museum of London Board of Governors – For Information	11/12/2018 13/12/2018 18/12/2018 23/01/2019 04/02/2019 18/02/2019 February 2019: date tbc 27/03/2019
Subject: City of London Visitor Strategy 2019/23	Public
Report of: Peter Lisley, Assistant Town Clerk and Culture Mile Director	For Decision
Report author: Nick Bodger, Cultural and Visitor Development Director	

Summary

The City Corporation’s visitor strategy 2013/17 expired at the end of last year. Following a successful tender process, RJS Associates were commissioned in April 2018 to undertake a full consultation with internal and external stakeholders, and to produce a new strategy.

The visitor landscape has shifted significantly since the last strategy was written. The opportunities and challenges of a post-Brexit London, the opening of Crossrail, and anticipated (significant) growth in London’s visitor footfall, as well as other major considerations such as the growth of the night-time economy, are all likely to impact on how we work to promote and develop the City as a key destination within London, and how we support London’s visitor economy more widely. These issues are considered in the new draft City of London Visitor Destination Strategy (2019-2023) which is appended to this report.

This report seeks Member approval and/or comments on the new draft.

Recommendation(s)

Members of the Culture, Heritage and Libraries Committee and the Policy and Resources Committee are asked to:

- Approve and provide feedback on the draft City of London Visitor Destination Strategy (2019-2023) as shown in appendix 1; and

- Note that your Committee will be asked to approve any significant amendments arising from the committee journey detailed above, endorsing the Strategy's submission to Court of Common Council in spring 2019.

Members of the Planning and Transportation Committee, Barbican Board, Open Spaces and City Gardens Committee, Guildhall School of Music & Drama Board, Cultural Mile Working Party and Museum of London Board of Governors are asked to:

- Note the draft City of London Visitor Destination Strategy (2019-2023) as shown in appendix 1 and provide feedback as relevant.

Main Report

Background

1. The City of London's Visitor Strategy 2013-17 expired at the end of last year. Working with your Cultural and Visitor Development Teams, RJS Associates were appointed in April of this year to undertake a full consultation across internal and external stakeholder groups and to produce a new strategy. This is attached in appendix 1.
2. The consultation saw interviews with key officers from across the City Corporation's tourism portfolio, Members and external tourism stakeholders. They included relevant City departments (and their Chief Officers), Culture Mile partners, neighbouring London Boroughs, area BIDs and national and London tourism agencies and authorities. Close liaison with your Corporate Strategy Team to ensure alignment with corporate plans and thinking was also a part of this process.
3. Following the interviews, themes and ideas began to emerge. To test these, workshops were undertaken to which key City tourism stakeholders were invited. These included members of the City's Hotels, Attractions and Retail Network and its City Culture Network. The current draft (appendix 1) is a reflection of both the interviews and the key themes which were discussed at the workshops.
4. Throughout the process, close attention has been paid to ensuring the draft strategy aligns with existing strategies, particularly the Corporate Plan, Cultural Strategy 2018/22 and the Culture Mile Strategy 2018/28.

Current Position

5. The new strategy is broken down into seven parts – an Introduction, the Strategic Context, Opportunities and Challenges, the Strategic Approach, Strategic Priorities, Implementation, and Outcomes and Monitoring. The Strategic Approach summarises the vision, priorities and outcomes on a single page.
6. The Strategic Priorities list new actions and ambitions and are specifically designed to challenge the organisation, reflecting conversations that have taken

place throughout the consultation process. Most can be realised within existing resources, while others may need to seek funding from internal and/or external sources. Business planning for the Town Clerk's Cultural Services teams and for other departments (where appropriate) will therefore need to address the priorities appropriately.

7. Following approval by the Summit Group in November 2018, further revisions are expected as the Strategy makes its journey through the Committees listed at the head of this report, reflecting their feedback and comments before a final draft is presented to the Court of Common Council in spring 2019.
8. The final amended Strategy will be resubmitted to your Culture, Heritage and Libraries and your Policy and Resources Committees should any significant changes have been made during its committee journey, ahead of it being considered by the Court.
9. The full appendices detailing the research behind the Strategy, a list of those consulted during the Strategy's creation, and highlights across the extent of the last Strategy's term (2013-17) are available on request from the Assistant Town Clerk and Culture Mile Director.

Corporate & Strategic Implications

10. Full consideration of the strategic context and implications for the new City of London Visitor Destination Strategy is given within the draft (appendix 1) under the section "The Strategic Context".
11. The Strategy has been developed in close consultation with your Corporate Strategy Team in the Town Clerk's Department to ensure alignment with corporate plans and thinking, and to agree appropriate monitoring and evaluation criteria.

Conclusion

12. A new visitor strategy has been developed by RJS Associates. The current draft reflects the thoughts, ideas and issues raised during the consultation process and seeks to prepare the City for the opportunities and challenges that lay ahead over the next five years.

Appendices

- Appendix 1 – Draft City of London Visitor Destination Strategy (2019-2023)

Background Papers

The appendices to the City of London Visitor Destination Strategy (2019-2023) are available on request from the Assistant Town Clerk and Culture Mile Director.

Nick Bodger

Cultural and Visitor Development Director

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Discover the City

The City Of London Visitor Destination Strategy (2019-2023)

Draft

June 2018

Commissioned by: City of London Corporation

Written by: Carmel Dennis and Richard Smith
Edited by: Flagship Consulting

RJS Associates Ltd
E: info@rjsassociates.co.uk

Foreword

“Our role in presenting the City, and indeed London, as an unparalleled world-class destination remains steadfast. We are blessed to be custodians of such an asset.”

With over 2,000 years of experience in welcoming the world, the City has always been, and continues to be, one of the most historic, yet innovative destinations, welcoming business and leisure visitors from across the globe.

Nationally, it leads all English local authorities for its use of heritage to foster a distinctive identity and enjoys the number one spot for engagement in culture, as identified in the Royal Society for the encouragement of Arts, Manufactures and Commerce’s (RSA) latest *Heritage Index (2016)*, and in the Government-commissioned *Active Lives Survey* conducted by Ipsos MORI in 2017.

This is the City of London Corporation’s fourth Visitor Strategy, its first was produced in 2007 and its most recent in 2013. Since that last strategy, huge progress has been made in delivering its vision – to significantly develop our visitor economy and, in so doing, enhance London’s attractiveness as place to visit and do business. In 2017, the City recorded increases against the strategy’s baselines of 19% in visits to its various attractions, 107% in visitors overall¹, and 109% in visitor spend. Today, the sector is estimated to support over 18,000 jobs in the City.

Our role in presenting the City, and indeed London, as an unparalleled world-class destination, remains steadfast. We are blessed to be custodians of such an asset

It is crucial that we stay ahead of economic and tourism trends to ensure that the City maintains its world-class status. There is no doubt there are significant challenges ahead: challenges which straddle political, economic and demographic issues, but also ones which involve welcoming new markets as countries start to open up to more international travel.

Research by *Humankind* in 2017, which was commissioned through a partnership of the City Corporation, London and Partners and the Mayor of London, sought to evaluate and optimise messaging about London, unveiling two compelling motivators for visitors to London specifically – motivators that the City has in spades. That “London is a city of amazing experiences old and new” and that London is a “city of discovery, with surprises at every turn” are the themes which lie at the heart of our 2019-2023 Visitor Strategy.

Our aim is for every visitor – whether here for business or leisure (or both), whether visiting from near or far, whether here for the first or the tenth time – to discover their own City experiences and create their own City stories.

Graham Packham, Chairman of the City of London’s Culture, Heritage and Libraries Committee [pending sign off from Mr Packham]

¹ A new model for calculating visitor footfall and spend was adopted by the City Corporation in 2016; this has seen significant increases on original estimates primarily because the new model includes groups not considered previously e.g. day visitors from a holiday base, and conference and meetings visitors. Growth in the City’s tourism sector (particularly accommodation) while significant, is therefore not the only contributor to the substantial increases quoted.

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1 Introduction

“By seeing London, I have seen as much of life as the world can show.” Samuel Johnson, 1773

The City of London *is* London.

It is the birthplace of our capital, with a history stretching back over 2,000 years. Its stories, sights, smells and sounds are unique and are integral to England’s political, social, literary, artistic and financial history. More than that, they have played a part in shaping the history of so much of the wider world.

Its skyline, where ancient places of worship, medieval halls and Tudor pubs jostle for space with some of the most architecturally-significant skyscrapers found anywhere today, is one of the most exciting in the world. Underneath, a dense medieval street plan invites visitors to tread their own path as they discover a wealth of world-famous, and lesser-known visitor experiences, all within easy walking distance of one another.

The City is hyper-connected to the rest of London, the UK and the world with seven mainline stations, seven underground lines and easy access to City Airport. Unsurprisingly, this brilliant connectivity is perfect for the millions of international business visitors who come to the City for work, meetings and conferences, investing in and building our national economy.

For so many visitors, the City embodies London. The role of its rich historic past, combined with a rapidly evolving future, cannot be understated and plays a significant role in London’s wider success as a global visitor destination.

This in turn benefits the City, which enjoys the many dividends of being part of the total London offer, including the world-class hotels, heritage, culture, shopping, parks and events which surround it.

This is *The* City within a city; London’s heart and heartbeat and the place from where this unique global entity grew and continues to grow.

2 The Strategic Context

This document provides a strategic framework for the development of the City of London’s visitor economy. It sets out a series of step-change objectives and identifies several priorities for development and key target markets.

It is the result of a wide-ranging review, including:

- Examination of international and national visitor trends and forecasts
- Consideration of the policies of the Government and national and local tourism organisations (in as much as they reflect the City’s own plans)
- Input from a series of workshops and consultations with tourism operators and stakeholders, and City Corporation Members and officers.

2.1 Policy Framework

The City of London’s Visitor Strategy supports national, local and industry economies, delivering positive benefits to Londoners through jobs, learning, “good” growth and prosperity.

2.1.1 This Visitor Strategy contributes to the **City Corporation’s Corporate Plan 2018/23** - in its aims to:

- Promote London for its creative energy and competitive strengths (ref. 7d)
- Promote the City, London and the UK as attractive and accessible places to live, learn, work and visit (ref. 8a)
- Champion investment in relevant skills and diverse talent pools (ref. 8d)
- Advocate ease of access via air, rail, road, river and sea (ref. 9c)
- Improve the experience of arriving in and moving through our spaces (ref. 9d)
- Create and transform buildings, streets and public spaces for people to admire and enjoy (ref. 10c)
- Protect, curate and promote world-class heritage assets, cultural experiences and events (ref. 10d)
- Champion a distinctive and high-quality residential, worker, student and visitor offer (ref. 10e).



2.1.2 The strategy is the City of London’s framework to support the Mayor’s **Tourism Vision for London** (produced by London & Partners). It aims to create a world class visitor experience through:

- Promotion
- Visitor experience
- Information, infrastructure and amenities
- Developing the infrastructure for business visits and events.

- 2.1.3 It supports the delivery of the **City of London's Cultural Strategy 2018/22**, with its focus on repositioning the City as a world capital for commerce and culture, developing Culture Mile (supporting **the Culture Mile Strategy 2018/28**) and promoting the cultural, heritage and creative strengths of the City.
- 2.1.4 It reflects the **City of London's Local Plan 2015**, which identifies the need "to promote a high quality of architecture and street scene appropriate to the City's position at the historic core of London...supporting the continued development of the City as a cultural destination for its own communities and visitors".
- 2.1.5 It draws from, and supports, national government plans and strategies, such as the national tourism plan of the Department of Culture, Media and Sport (DCMS), and the Greater London Authority's (GLA) plans, such as **Culture for all Londoners, A Vision for London as a 24-hour City** and the **London Plan**.

2.2 The global tourism economy

Travel and tourism is one of the world's largest economic sectors, accounting for 10.4% of global GDP and 313 million jobs, or 9.9% of total employment in 2017.²

London is the gateway to England, and the UK. In 2016, London alone attracted over 30m overnight visits - of which over 19.1m were international. London accounts for half of England's international visitors and its visitors generate nearly £30 billion of spend a year. The sector employs 700,000 people – one in seven of the capital's jobs – and accounts for 11.6% of London's GDP³. Visitor numbers to London are expected to grow to 40.4m by 2025.

² Travel & Tourism Economic Impact 2018 (World Travel and Tourism Council 2018)

³ A Tourism Vision for London (London and Partners 2017)

2.3 Tourism in the City of London in 2017

“The City is a world within itself. Centred in the heart of the metropolis, with its innumerable capacities for commercial pursuits, it presents at first sight to a stranger a most mysterious and unfathomable labyrinth of lanes and alleys, streets and courts. Streets thronged with a bustling multitude, whose various occupations, though uniting in one grand whole, seem to have no direct association with each other.” D. Morrier Evans, *The City*, 1852

THE BELOW IS TO BECOME A SERIES OF INFOGRAPHICS

- 18.4m visits
- £1.76billion spend
- Supports over 18,000 jobs
- 70% of spend is from London and UK residents / 30% from overseas
- More than half of spend (53%) is from business visitors, the rest from leisure visits⁴
- 6.6m visits to City attractions (+26% since 2010⁵)
- 383,000 visits to the City Information Centre
- 6,200 hotel/aparthotel bedrooms⁶ (circa 40% increase since 2011)

2.4 Tourism Futures

There are three key emerging trends that will impact tourism to the City; all create exciting opportunities for the area and the way its product is packaged and promoted.

- London’s visitor numbers are expected to grow to 40.4 million by 2025, with increases across all markets; the strongest growth is anticipated to come from Asia (particularly China).⁷
- Technology will continue to transform the visitor experience. Smart phones have become essential tools, used for researching and booking, as well as for wayfinding and sharing photos via social media. Having timely, accurate and lively online destination content will be crucial. Push-technology has become super-smart, with algorithms facilitating the targeting of specific audiences with specific messages that meet their profile, interests and location⁸

⁴ City of London Facts of Tourism 2017 (RJS Associates Ltd – 2018)

⁵ City of London’s Visitor Attractions Monitor (RJS Associates Ltd 2018).

⁶ City of London Facts of Tourism 2017 (RJS Associates Ltd 2018).

⁷ A Tourism Vision for London (London and Partners 2017)

⁸ The Future Travel Journey: trends for future tourism product development (Foresight Factory Research for VisitEngland July 2017)

- Consumer behaviour is changing, as there is a fundamental shift in what value means. Value is about collecting as many unique experiences as possible and travellers are seeking genuine, authentic, tourism products and will be driven by 'wish lists' of experiences.⁹

⁹ The Future Travel Journey: trends for future tourism product development (Foresight Factory Research for VisitEngland July 2017)

3 The Opportunities and Challenges

3.1 Opportunities

Prestige and depth of offer	There is nowhere in the world like the City. From a visitor perspective it offers incredible value in terms of the number of unique, authentic experiences on offer within a small and walkable distance of one another.
Host of new attractions	<p>The Sky Garden, London Mithraeum, Billingsgate Roman House and Baths, and Aldgate Square and Guildhall Yard (both as event spaces) are all recent additions to the City's visitor offer; in the pipeline is the new location for the Museum of London and a new visitor centre at the Monument Piazza.</p> <p>There are exciting opportunities for the development of other attractions including the Old Bailey, Mansion House and more high-level sky gardens.</p> <p>These will enhance the visitor experience and the appeal of the City as a place to visit and do business.</p>
Bed-stock increase	The City has nearly 6,200 hotel/aparthotel bedrooms, a growth of 40% since 2011 (with more planned), creating opportunities for an overnight market, particularly for leisure visitors at weekends.
Retail and restaurants	The City's shopping, food and drink offer has been transformed; developments, such as Bloomberg Arcade, One New Change and Broadgate, are at the forefront of innovative food and beverage experiences.
Culture Mile	A rival to any of London's cultural hubs, the creation of Culture Mile will add immeasurably to the City's rich arts and heritage offer, creating a lively and safe day, evening and night-time destination.
Evening and night time economies	Illuminated River, Culture Mile and increased transport options will deliver great opportunities to develop the City as a destination of choice for overnight stays and evening visits.
Improved connectivity	Crossrail, the expansion of City Airport and the Night Tube will create opportunities to develop new markets at times when the City has capacity, particularly weekends and evenings.

3.2 Challenges

Peaks and troughs of capacity and demand	Although the City benefits from high year-round occupancies, this is not always the case at weekends, which are quieter, and when some attractions, shops, bars and restaurants are closed. At these times, demand for hotels is weaker, and the streets are quieter and lack animation - this can feel unwelcoming for visitors.
Capacity for growth	Demands on land use mean that future growth in hotel supply will be limited – as recognised in the City of London Local Plan policies. Increasing overnight stays will therefore be limited, noting the Culture Mile area is perceived to be particularly short of hotels.

<p>Increased competition</p>	<p>Other areas and boroughs of London – such as Greenwich and the Queen Elizabeth Olympic Park – have plans for major infrastructure and cultural developments in the coming years.</p> <p>Globally, other world cities are developing facilities and targeting visitors as well as business investors, particularly Frankfurt, Dubai, Singapore and Beijing.</p> <p>The City needs to ensure it works hard to maintain its market share.</p>
<p>Perception issues</p>	<p>London can be perceived as expensive and crowded, especially among domestic audiences¹⁰; despite recent leaps forward, the City is known for business significantly more than for its heritage and cultural offer.</p>
<p>Wider challenges</p>	<p><u>A sustainable workforce</u>: across London the visitor sector is estimated to employ 700,000 people. It is estimated that 21,000-63,000 recruits are needed each year to maintain current levels. This could be a significant challenge post-Brexit.</p> <p><u>Terrorism and security</u>: central London and the City remain sensitive to terrorism and security-related incidents. These can lead to major drops in visitor numbers and impact negatively on perceptions. Overseas markets, families and school groups are particularly susceptible.</p> <p><u>Visas</u>: India and China are forecast to be major growth markets for international travel but the costs of obtaining visas is a major concern for London’s tourism sector. Post-Brexit, tighter visa regulations could negatively influence visitor numbers to the UK from European markets for both leisure and business.¹¹</p> <p><u>Air capacity</u>: London’s runways and airports have sufficient capacity to support the growth anticipated through to 2025. In the long term however, this could become a constraint for growth across all London.</p> <p><u>Hotel capacity</u>: it is estimated that London needs at least an additional 23,000 hotel rooms by 2025 to sustain growth at predicted rates.¹²</p>

¹⁰ City Hotels, Attractions and Retail Network (CHARN) presentation (London & Partners – 2018)

¹¹ Implications of Brexit (Tourism Alliance 2017)

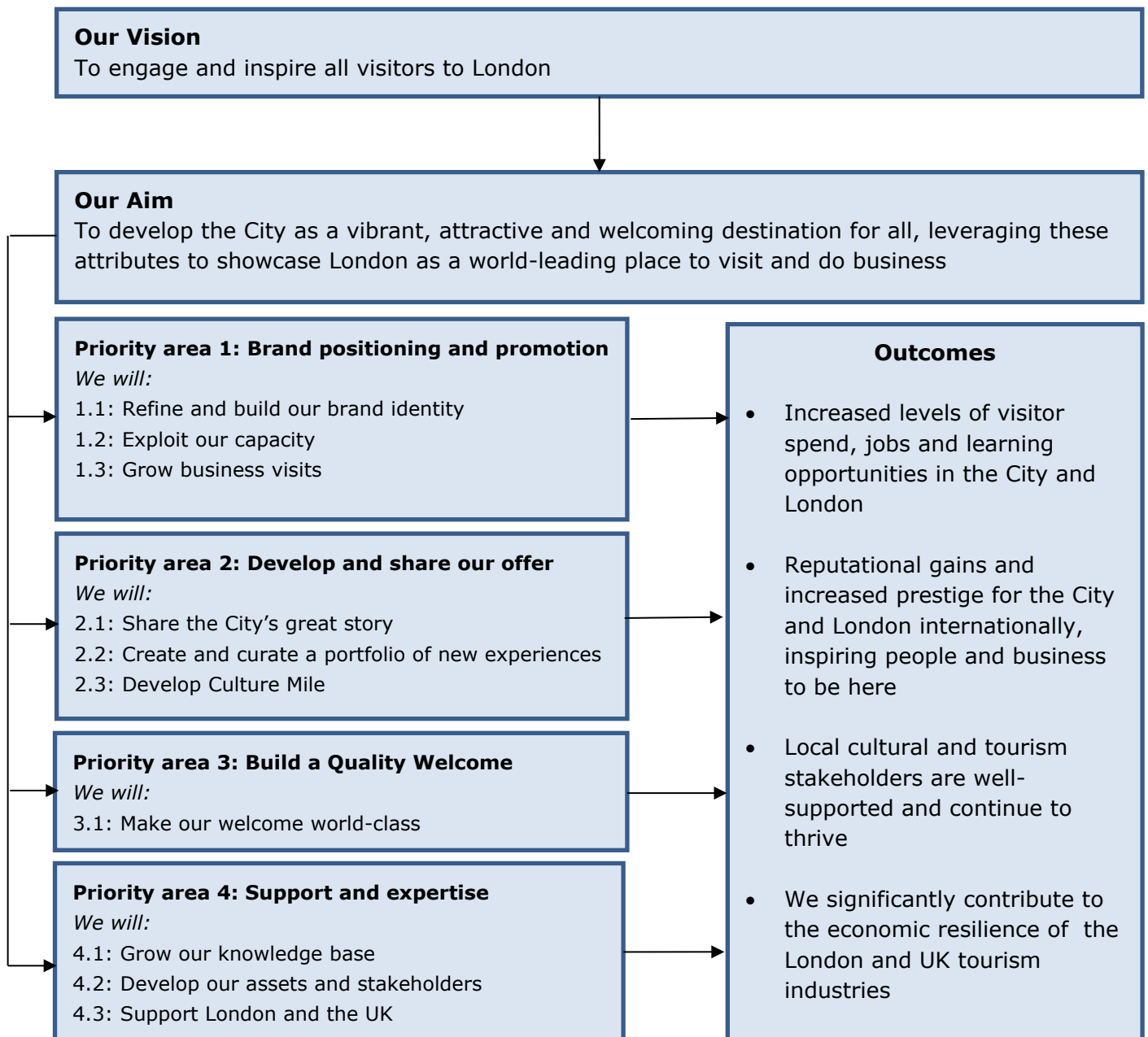
¹² A Tourism Vision for London (London and Partners 2017)

4 The Strategic Approach

“I’ve been walking about London for the last thirty years, and I find something fresh in it every day.” Walter Besant

4.1 Overview

This five-year Visitor Strategy is supported by four key priority areas, all focused on showcasing the very best of the City of London for leisure and business visitors, which will in turn benefit the wider London community.



Underpinning these objectives there are a number of universal values and principles, which cascade throughout the organisation and how we work. These include:

- Working in partnership in an open, accessible and transparent way
- Practising responsible tourism and building 'good growth' for the City – targeting the right markets at the right times in the right locations
- Championing an environmentally-sustainable City – encouraging walking, cycling, pedestrianisation and use of 'clean routes'
- Creating a London for all Londoners – enabling all to benefit from growth and prosperity.





4.2 Target Markets

This strategy focuses on those visitor markets which have the most significant value and/or growth potential for the City, and where actions will make the biggest impact.

Criteria for prioritising markets include:

- Potential motivation triggers: do we have the right product to align with interests?
- When visiting: season, day of week, time of day
- Level of spend
- Longer-term potential: repeat visits, referrals, extenders
- Ease of marketing: cost and resource to influence audiences (at inspiration stage, during planning, when in London).

The City of London has identified four tier-one target markets:

	<p><u>Overseas sightseers</u>: A significant market for London and the City. Their key reason for visiting is our exceptional heritage offer. There are clear and actionable opportunities to grow this market by building on and cross-selling the number of unique experiences in a small and connected area.¹³</p>
	<p><u>Day-trip families</u>: Based in London and the Home Counties and typically travelling with children under the age of 15. The City has a strong family offer with bucket-list attractions and good connectivity.</p>
	<p><u>London adults</u>: Living (and/or working) in London and visiting the City for a day or evening as couples or in friend groups without children. They will be influenced by our heritage and cultural offer, events, Culture Mile, and the evening and night-time economies.</p>
	<p><u>Business visitors</u>: Account for over half of visitor expenditure in the City. They are an important audience to influence, to persuade to explore and spend more when they are here, to encourage to re-visit or to extend their stay and with whom we must foster the aspiration to work and do business in London.</p>

¹³ A Tourism Vision for London (London and Partners 2017)

5 Strategic Priorities

5.1 Priority area 1 – Brand Positioning and Promotion

5.1.1: Build and refine our brand identity

Rationale

The City is home to attractions and buildings that are international icons, steeped in history and perfect for rich and engaging storytelling. The depth of the City's heritage however, and the variety of its culture are not fully represented or reflected in public perceptions of the area¹⁴.

The concepts of "City of Old and New" and "City of Discovery"¹⁵ provide the foundation for our future positioning – building on the juxtaposition of our unique heritage and our creative, dynamic and innovative present, combined with a medieval street plan of alleyways and passages, inviting discovery and revealing a wealth of hidden gems.

Areas for Action

- Position the City as a world-leading heritage destination and London's heritage centre. This will improve the profile of the City to heritage service providers – from heritage agencies to museums and interpretative experiences – encouraging them to see the City as the perfect place in which to conduct business.
- Promote the City's history and heritage both domestically and internationally:
 - Create London-wide campaigns that develop the "City of Old and New" concept
 - Create and/or seek joint ventures and campaigns that drive footfall between heritage destinations (such as that achieved in *England Originals* with England's Historic Cities)
 - Strengthen the City's alliance with Visit Greenwich and seek similar opportunities with heritage hubs within London
- Develop target-market-focused digital content that features the City's unique heritage and identity, distributing via social media and through our strategic partners.
- Further build the concept of "City of Discovery" promoting the City's many pop-up events and installations in the public realm (notably within Culture Mile and through the City's Outdoor Arts Programme) across social media channels specifically, targeting the markets identified below.
- Develop a City-wide marketing and communications strategy to drive visitors', learners' and residents' awareness of our cultural offer, focussing on the anticipated increase in visitors with the Elizabeth Line in 2018/19 and working to engage the existing working population¹⁶.

¹⁴ Source: Londinium Evaluation report (The Audience Agency for the City of London Corporation – 2017)

¹⁵ Source: London Message Testing (Humankind Research for London and Partners, City of London Corporation, GLA – 2017)

¹⁶ Action adopted from the City of London's Cultural Strategy 2018/22 (objective 7)

Markets Reached



5.1.2: Exploit our capacity

Rationale

The City has peaks and troughs of capacity which are perhaps at odds with the wider London offer; it is therefore a priority to develop strategies to address under-use. Weekends and school holidays are particularly low-demand periods for many hotels, bars and restaurants; and attractions see visitor numbers dip during the winter months.

Strategies and solutions are needed to stimulate demand in quieter periods, activating key market segments at different times. The aim is to deliver good growth and add real value to businesses within the City.

Developing such tactical marketing campaigns will be best achieved in partnership with transport operators and other London boroughs, as well as strategic partners such as London & Partners. The City may play a leadership role or a supporting role in such initiatives.

Action Areas

- Refine the appropriate target market mix for the City, identifying key segments and their motivations, and craft suitable campaigns that are shared with appropriate delivery partners.
- Undertake tactical marketing campaigns that address low-demand periods, and which respond to opportunities as they arise, including:
 - Joint campaigns with transport operators that promote the City at weekends and during school holidays
 - Featuring City product internationally, by establishing new partnerships with incoming tour operators and overseas travel trade.
- Support the Mayor's **Vision for London** as a 24-hour city by developing and growing the City's night-time offer, with particular emphasis on Culture Mile. The focus should be on delivering compelling "old and new" alternatives to traditional activities.

Markets Reached



5.1.3: Grow business visitors

Rationale

The City welcomes high numbers of business visitors (with and without family members/partners) for meetings and conferences, and on short-term working contracts. Their experience of the City can influence their future business decisions for relocation, investment and recommendation.

There are opportunities to increase the number of business visitors (particularly conference visitors), their spend and experience (particularly those staying overnight).

Action Areas

- Raise the profile of the City's suitability for conferences and meetings by showcasing its exclusive range of venues and facilities through the London Convention Bureau (London and Partners) and other channels (e.g. London City Selection).
- Support London's welcome to large business conferences and congresses, showcasing Culture Mile as a key attractor.
- Support the London Convention Bureau's London Ambassador Programme by engaging City business figures and experts to help generate and attract conferences.
- Develop dedicated, and incentivised, collateral and digital content to encourage business visitors to extend their stay, return and/or recommend the City.
- Identify and support appropriate partners, including the City's hotels, to develop specific campaigns (domestic and international) targeting business visitors.
- Develop solutions to better penetrate City businesses and communicate our offer to City workers.

Markets



- Domestic
- International
- Conference organisers and delegates.

5.2 Priority area 2: Develop and share our offer

5.2.1: Tell the City's great story

Rationale

The story of the City, its status as the birthplace of London and cradle of the capital's rich history and heritage, and its roots as a world leader in law, business and politics, are its crown jewels when it comes to attracting visitors.

Interpreting, and reinterpreting the City's story to engage with target markets will be pivotal in encouraging further growth and creating the kind of dynamic campaigns which drive awareness and footfall.

Action Areas

- Develop and agree a digital marketing plan that clearly focusses our ambitions for attracting visitors through our own web-based and social media platforms as well as those of third parties.
- As part of the above, develop a dedicated visitor website that tells the story of the City, provides itineraries and experiences, and acts as a portal to attractions, events and services.
- Complement the new website with a suite of quality-curated digital content, pushing this through strategic partners and third-party websites, social media and apps to build City presence and reach.
- Utilise virtual museum and gallery digital platforms to curate and provide access to our assets and collections and create an interest in visiting the City.
- Develop the City's streetscape as a living museum using virtual and augmented reality and on-street interpretation. Work with the City Information Centre, Culture Mile (notably Museum of London) and Monument Visitor Centre to complement this offer.
- Encourage use of ground-level window space to create a sense of place for the City, via artworks, interpretation and City timelines and stories.
- Add depth to the City story through the development of content and marketing collateral with neighbouring areas.

Markets Reached



5.2.2: Create and curate a portfolio of new experiences

Rationale

To claim its starring role on a crowded world stage, the City needs to make the utmost of its established icons and of its less-exposed assets to create a portfolio of new world-class experiences which tap in to the crucial "fear of missing out" (FOMO) motivator. These new experiences must showcase the City's dynamism, attract new audiences and ensure previous visitors have the excuses they need to return again (and again).

Action Areas

- Help develop new visitor experiences using our existing assets, such as the Central Criminal Court at Old Bailey, Mansion House and our Roman archaeology.

- Build the City's riverside offer through the opportunities arising from the Illuminated River and Thames Tideway Tunnel (Blackfriars Foreshore) projects, using these as catalysts to deliver new day and night-time visitor experiences.
- Make the most of the City's growing roof/skyscraper garden venues, by creating an umbrella "high-garden" brand/campaign, simplifying access and building a portfolio of bookable experiences.
- Promote the new Monument Visitor Centre and Tower Bridge experiences and use as a 'gateway' to other City experiences.
- Build and promote the City's outdoor visual arts offer to include closer working with the Crossrail art and the City's annual "Sculpture in the City" programmes.
- Develop an annual series of major outdoor events which celebrate the City's unique character and heritage and help achieve global resonance.

Markets



5.2.3: Develop Culture Mile

Rationale

Culture Mile, located in the north-west of the Square Mile, is home to some of the world's greatest cultural institutions: Museum of London, the Barbican Centre, the London Symphony Orchestra and the Guildhall School of Music & Drama.

The raison d'être of Culture Mile is twofold; firstly, to contribute to shifting perceptions of the City, establishing it as a globally-renowned destination for culture, creativity and learning, as innovative and dynamic in the arts as it is in commerce; secondly, to help develop the area as a vibrant and welcoming cultural, creative and learning destination for all.

The arrival of Crossrail, and its potential to massively increase visitor numbers into the City, provides real opportunity for visitor experiences and promotions for Culture Mile.

Action Areas

- Proactively support the delivery of the **Culture Mile Strategy 2018/28**, coordinating and aligning relevant City-wide visitor initiatives and opportunities to support its growth as a cultural centre; specifically:
 - Use Culture Mile as a focus for positioning the City as an evening and night-time destination
 - Deliver appropriate visitor information services within the Culture Mile footprint, utilising the expertise of the City Information Centre
 - Work actively with Culture Mile to promote the cultural offerings of the wider City to relevant audiences, including working with Crossrail and other transport operators
 - Use City visitor assets to amplify the Culture Mile offer and encourage extended stays, linking between attractions via packages and promotions.

Markets Reached



5.3 Priority area 3: Build a Quality Welcome

5.3.1: Make our welcome world-class

Rationale

A world-class destination like the City has to offer a world-class welcome – one which will give each and every visitor an experience they will never forget.

Our welcome to visitors needs to encompass an attractive public realm, easy wayfinding, well-trained and knowledgeable front-of-house teams, and good quality visitor information in the right places, all supported by the kind of infrastructure (toilets, transport, access) that visitors expect.

The arrival of Crossrail will make Farringdon Station (with its direct link to Heathrow) a major point of entry to the City, and therefore this area will have significant potential to influence and inspire visitors.

While the City already offers a strong welcome to its many visitors, we must recognise that to stay at the top of our game, we have to face the future head on; this includes sustaining a quality workforce (predicted to be a challenge in the future) and addressing the consistency of our wayfinding.

Action Areas

- Implement the City's Legible London signage and lighting strategies; ensure new mapping is reflected across all visitor collateral, whether printed or digital.
- Operate and promote the City Information Centre as a free visitor information service for all visitors to the City, London and England; consolidate its position as the official information centre for London's cultural and sporting events and build its long-term sustainability by increasing commercial operations and support.
- Boost visitor-facing skills across the sector by developing training opportunities at our visitor attractions.
- Using City Information Centre expertise, provide visitor welcome training for London's volunteer ambassadors, City security teams and concierges, event security staff and other relevant personnel.
- Open up walking routes that make the City easier to explore, for example the river walkway from Tower of London/Tower Bridge.
- Provide welcome services to the travel trade through additional coach parking and dropping off facilities, particularly at weekends.

Markets Reached

All visitors – when already in London.



5.4 Priority area 4: Support and expertise

5.4.1: Grow our knowledge base

Rationale

Understanding visitors, their motivations and requirements, is fundamental to an effective Visitor Strategy and should underpin marketing and infrastructure development programmes.

The City must continue to develop its collective knowledge of visitors, and the performance of its visitor sector, through fresh and targeted research projects, which give invaluable insight into the visitor economy – locally and more widely.

Action Areas

- Maintain and extend the collection of destination level performance-related data held by the City, prioritising the build of our qualitative knowledge base.
- Develop insights into business visitor markets; specifically refresh our co-funded Business with Pleasure research.
- Define, agree and report outcomes aligned with our **Corporate Plan** to measure the success of this strategy, underpinning the measures already defined in section 7.
- Share our knowledge to encourage reciprocal exchange and to support and inform local, London, national and industry programmes and stakeholders.

Markets



5.4.2: Develop our assets and stakeholders

Rationale

The City Corporation manages a significant portfolio of visitor assets, including Tower Bridge, Guildhall Galleries and the City Information Centre. In its local government role, it protects the interests of all in the City who play a part in its visitor offer, convening, connecting and supporting stakeholders.

The City Corporation also recognises the need to future-proof its assets and those of its stakeholders, building long-term and sustainable business for the destination.

Similarly, it acknowledges that while City attractions are key drivers of visits, they cannot create by themselves the multi-faceted, multi-partner events, commemorations and campaigns that deliver international resonance for the destination and gain real traction in the marketplace.

A priority action is therefore to facilitate greater collaboration across attractions and create suitable 'umbrella' campaigns in which all can participate and derive benefits.

Action Areas

- Provide more and better networking opportunities to foster business partnerships and joint initiatives.
- Programme major "hero" events to support wider, high-profile thematic campaigns in which stakeholders can feature and from which they can derive business focussing on unique City content (e.g. *Shakespeare Woz Ere*, *London's Burning* (both 2016), and *Londinium* (2017)).
- Develop content resources for stakeholders to use in their operations, such as licensed images, videos, copy and itineraries.
- Maximise the impact that City-owned and funded assets can play in the visitor sector and exploit benefits for these assets through greater exposure (e.g. through strategic and collective partnerships and alliances) and commercial development.
- Promote the City Information Centre to local stakeholders as a vital and free resource for promotions and welcome/product training.

Markets Reached



5.4.3: Support London and the UK

Rationale

The City is an integral part of London's (and the UK's) visitor offer, and therefore has an integral part to play in shaping its international image. It both benefits from and contributes to that image and to London's worldwide reputation and is part of the London gateway to the nation's regions for international visitors.

With its assets and expertise, the City can play a key role in supporting London's boroughs (most of whom do not have a dedicated tourism resource) by bringing the benefits of tourism to all Londoners, and it can work as a gateway partner for the nation, supporting the UK's tourism industry as a whole.

Action Areas

- Share our assets and expertise with London's boroughs, building on programmes already established through *London Borough of Culture* and *England Originals*
- Actively participate in London-wide events such as *Open House*, *London Landmarks Marathon* and *London Games Festival*, as well as major sporting events and London and national celebrations and commemorations, supporting our neighbours and the London and national tourism industries
- Provide showcase opportunities for London and UK partners at our City Information Centre.
- Working with our Culture Mile partners, develop major events that deliver global recognition for London, such as *London's Burning* in 2016.
- Support industry-wide training initiatives and recruitment drives across the tourism spectrum through participation and advocacy.

Markets



6 Implementation

“There is nowhere else like London. Nothing at all, anywhere.” Vivienne Westwood

The City Corporation is the crucial lynchpin in the implementation of its Visitor Strategy. It is:

- A major provider of, and investor in the City’s visitor product – operating several key attractions and the City Information Centre, as well as running landmark events
- A co-ordinating organisation that brings together visitor sector partners from across the City with other stakeholders to achieve collaboration and networking
- A landowner and planning body with a role in creating a distinct sense of place and a quality environment
- A long-term custodian of heritage and a major investor in culture and the arts
- An independent voice providing leadership and expertise for the City’s visitor sector at regional, national and international levels.

This strategy will be delivered by the City Corporation through a range of strategic and tactical partnerships. The diagram below provides some examples.



Delivery will be coordinated by the City Corporation’s dedicated Visitor Development Team working with champions across departments. This will include a Strategy Steering Group comprising senior officers and potentially senior representatives from stakeholder organisations. It will meet twice a year to oversee delivery and ensure co-ordination and streamlined cross-departmental programmes.

Major new campaigns, events and activities will be subject to the approval of the City Corporation's Director of Communications.

7 Outcomes and monitoring

This strategy will be reviewed and monitored against a specific set of outcomes that represent meaningful measures of progress across the City of London as a destination.

These are summarised in the following table:

Measure	Priority areas	Link to Corporate Plan (as per page 5)	Specific measures	Method of monitoring
Awareness and perceptions of the City	1.1, 1.2, 1.3	7d, 8a, 9d, 10e	<ul style="list-style-type: none"> Awareness of City as cultural and/or visitor hub Awareness of where visiting (visitors) Awareness of specific facilities in the City Perceptions of the City (based around a series of statements on the City) 	<ul style="list-style-type: none"> Visitor survey – leisure visitors Visitor survey – business visitors Perception’s surveys – e.g. major City events
Conferences	1.3	7d, 8a, 10e	<ul style="list-style-type: none"> Increase in conferences 	<ul style="list-style-type: none"> UK Conference and Meetings Survey
Business visitor spend	1.3	7d, 8a, 8d	<ul style="list-style-type: none"> Increase in spend by business visitors – (e.g. through additional activities and leisure extension) 	<ul style="list-style-type: none"> Visitor survey – business visitors
Visits to attractions	1.1, 1.2, 2.2, 3.1	8a, 9c, 9d, 10c, 10d, 10e	<ul style="list-style-type: none"> Increased visitor numbers – particularly in off-peak months 	<ul style="list-style-type: none"> Attractions Monitor
Visits to City Corporation attractions	1.1, 1.2, 2.2, 3.1	8a, 9c, 9d, 10c, 10d, 10e	<ul style="list-style-type: none"> Increased visits including new attractions 	<ul style="list-style-type: none"> Attractions Monitor
Satisfaction	2.1, 2.2, 2.3, 3.1	8a, 8d, 9c, 9d, 10c, 10d, 10e	<ul style="list-style-type: none"> Satisfaction with different aspects of the City offer – public realm, signage, information, overall experience 	<ul style="list-style-type: none"> Visitor survey – leisure visitors Visitor survey – business visitors
Occupancy	All	7d, 8a, 9c	<ul style="list-style-type: none"> Increase in occupancy and ADR – particularly at weekends, off-peak months 	<ul style="list-style-type: none"> Occupancy Survey
London and UK support	4.1	7d, 8a, 10c, 10d, 10e	<ul style="list-style-type: none"> Impact of major City events on London National and international coverage 	<ul style="list-style-type: none"> City events’ evaluations

Monitoring and evaluation will be led by the City Corporation’s Visitor Development Team, working with the Corporate Strategy and Performance Team.

These teams will also define, agree and report outcomes aligned with our **Corporate Plan**, underpinning the measures provided above.

All measures will be reported publicly on an annual basis. However, data for some of the above quantitative measures does not currently exist. Baselines and targets for these

measures will be established following strategy approval. These will be presented in the annual monitoring report (see above).

8 Summary

This, the City of London Corporation's fourth strategy, seeks to build on the achievements of preceding strategies, engaging and inspiring every visitor to London so growing our visitor economy to the benefit of local sector stakeholders and contributing to London's success as a World City.

It seeks to do this by developing the City as a vibrant, attractive and welcoming destination for all, leveraging these attributes to showcase London as the best place to visit and do business.

This will be realised through a series of priority action areas in that we will:

- Refine and build the City's visitor brand
- Exploit its capacity
- Grow its business visitor offer
- Tell its story brilliantly
- Create and curate new visitor experiences
- Develop Culture Mile
- Make its welcome world-class
- Grow its knowledge base
- Support and develop its assets and stakeholders
- Support London and the UK

The success of the strategy will be measured against a series of agreed outcomes:

- Increased levels of visitor spend, jobs and learning opportunities in the City and London
- Reputational gains and increased prestige for the City and London internationally, inspiring people and business to be here
- Local cultural and tourism stakeholders are well-supported and continue to thrive
- We significantly contribute to the economic resilience of the London and UK tourism industry

The table in section 7 details the monitoring and evaluation criteria that will be established and reported on year-on-year. If successful, the strategy will significantly contribute to a number of the City Corporation's aims as detailed in its Corporate Plan 2018/23 and listed on page 5.

The City Corporation is therefore committed to delivering this strategy and recognises the value of tourism to the communities it serves. That value is not confined to the growth of sector economies but reverberates across all parts of national life, building better futures for all, a stronger and more resilient London, and an international reputation for the country that enables it to thrive in the face of the significant challenges and pressures it will face over the next five years. We want to welcome the world and to secure our place within it. This strategy significantly contributes to that ambition.

Agenda Item 8

Committee:	Date:
Open Spaces & City Gardens	04 February 2019
Subject: City Gardens Manager Update	Public
Report of: Director of Open Spaces	For Information
Summary This report provides an update to Members of the Open Spaces & City Gardens Committee on management and operational activities across the City Gardens section since December 2018.	
Recommendation Members are asked to: <ul style="list-style-type: none">• Note the report	

Main Report

Finance

1. At the point of writing, the budgets for both City Gardens (City Fund) and Bunhill Fields (City's Cash) are in line with anticipated spend for this time of year. Members will be aware of the increasing pressure on budgets, which is only likely to get worse in future years as a result of any further budget reductions, and an anticipated reduction in the availability of Section 106 and Community Infrastructure Levy, against the background of a significant rise in the number of people using our gardens.

Personnel

2. There is currently one vacancy for a Support Services Officer within the team, for which we are currently advertising.

Operational Activities

3. The tree work contract that was entered into in 2018 has now been terminated. A new interim contract that will service City Gardens, West Ham Park and the Cemetery and Crematorium has been awarded, which will run until the end of June, at which time a new OJEU contract should be in place that will run for a longer contract term.

4. The team are progressing with the IT transformations programme, developing in-house software systems and trialling portable devices with an aim to roll out in April this year.
5. In order to combat air pollution in the capital, the Mayor of London is implementing an Ultra-Low Emissions Zone (ULEZ) in April this year. Despite being fewer than four years old, due to the type of engine they have, the City Gardens fleet of five vehicles do not meet the required emissions levels and consequently would incur daily penalty charges. Additionally, although an upgrade to a more modern, compliant diesel engine would be enough to satisfy the requirements of ULEZ, the City's Transport Policy includes a more stringent requirement in that officers will not be able to purchase or lease diesel vehicles unless there is no current alternative fuel option. This matter is of the utmost priority for the team which is working closely with City Procurement evaluating the options available to ensure that we are in the best position for April. It should be noted all possible solutions will have a significant impact on local risk budgets. As an interim measure the team is looking to temporarily swap non-compliant City Gardens vehicles with compliant vehicles from other Open Spaces divisions.

Pets and Diseases

6. **Box Disease:** The programme to replace all infected Buxus plants will commence within the next few weeks. The area around Carter Lane gardens has been identified as an early priority.

Rough Sleeping

7. Whilst rough sleeping remains an ongoing issue within the gardens, there have been no further incidents of long-term encampments since St Botolph's Bishopgate was cleared of tents in autumn 2018.

Bunhill Fields HLF Funding Bid

8. In August 2018 a grant funding application was submitted to Heritage Lottery Fund (HLF) for restoration of Bunhill Fields in partnership with London Borough of Islington (LBI). HLF's Board of Trustees had to make decisions on applications that totalled £125 million nationally with a budget of only £19 million available. Unfortunately, the City's application was rejected due to insufficient funds. Positive feedback was received from HLF as they thought that this was a well-planned project that has the potential to deliver good quality restoration, learning and training works. In future applications, HLF has indicated value in exploring additional partnership funding, outside of the 2 project partners (COL and LBI), which could help to reduce the overall grant requested. HLF's new funding programmes launches at the end of January 2019. The project officer board will reconvene in March 2019 to consider the way forward before making a recommendation to this Committee in April 2019.

Project Updates

9. **Barbican Planters:** The final pieces of the new planters will be installed on the podium in early February with planting taking place later that month or early March. At Willoughby Tower, a planter base has been badly damaged. As part of the above project, City Gardens have been tasked with taking apart the planter and rebuilding it with new pieces.
10. **St Alphage's Garden:** Currently under construction, it is anticipated that planting will take place in February 2019, following a major refurbishment of the site.
11. **Monument Street/Lower Thames Street:** An enhancement of the area which now includes a large raised planter and a new street tree. Water has been provided within the project by means of a tap and protective cover. The team is due to carry out planting by end of March. This project is a 'test project' for City Gardens where one of the large planters has been filled with manufactured substrate whilst the lower smaller bed has normal soil infill. The same plant selection will be used in both planters and so comparisons can be drawn.
12. **Stonecutter Street – Goldman Sachs development:** Substrate has now been laid in the four planters along Farringdon Street. The infill for the planters on Shoe Lane will be carried out in February with planting being carried out in late March to meet the planting deadline. Due to working at height risks, bespoke systems have been designed and will be installed on all the planters to enable maintenance to be undertaken safely.
13. **60-70 St Mary Axe:** The design incorporates three raised planters with multi-stem trees, underplanting and automated irrigation. The installation date is anticipated to be early 2019.
14. **Artizan Street:** The former car park ramp has been transformed in to a sloping garden along with raised planters and screen planting to enhance the streetscape. Irrigation will be included, and the anticipated planting date is spring 2019.
15. **Senator House:** The garden, constructed by the developer's contractor under licence, is nearing completion; snagging works by the developer need to be carried out. The specimen trees are already in place and the City Gardens team will be completing the remainder of the planting in March, once the snagging is complete.
16. **Greening Cheapside:** The Department of Built Environment (DBE) are working on a project to reduce the impact of the 3 planters around the Sugar Building and the St Paul's tube station entrance/exit, including the two planters opposite the tube station entrance on the crossing island on St Martin Le Grand. Due to increased pedestrian numbers these beds are no longer fit for purpose and are causing congestion. The new scheme will see a reduction in their size and include seating. New street trees will also be included. The design is still being developed by an external consultant on behalf of DBE, but the planting will seek to deliver a cohesive design of sustainable species, helping to reduce

future maintenance requirements and therefore costs. Members should note that this will see the displacement of traditional seasonal bedding in this area.

17. **Millennium Bridge planters:** Two large planters, installed as part of the Riverside improvements will be planted in the coming months. These will include multi-stemmed trees and robust underplanting to complement that used outside the City of London School.

Planning

18. A list of planning applications that have been received since the last Committee meeting can be found in Appendix 1.
19. Finsbury Circus – a brief update on Crossrail issues is attached at Appendix 2 (Non-Public).

Community, Volunteering and Events

20. **St Michael Cornhill:** City Gardens are working with Friends of City Gardens, who have applied for funding, to improve the planting within the garden following an extensive refurbishment to the Vicarage which has had a detrimental effect on the garden.

- **Appendix 1** - Planning Application City Gardens Consultations December 2018 – January 2019
- **Appendix 2** – City Gardens update Non-Public item

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Appendix 1

Planning Application Open Spaces Consultations December 2018 – January 2019

Application number	Location	Description
18/01198/FULL	Brewers' Hall Aldermanbury Square London EC2	Demolition of third floor mansard, erection of replacement floor and additional double mansard and change of use of second floor from livery hall (sui generis) to office (B1) to create an additional 631.5sq.m of lettable office space (B1); and works to Brewers Hall Garden.

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