

Committee(s):	Date(s):
2012 Member Sub-Committee Culture, Heritage and Libraries Committee	12 October 2012 20 October 2012
Subject: Evaluation of activities undertaken by your Visitor Development Team as part of the City Corporation's contribution to the 2012 Games	Public
Report of: Director of Culture, Heritage and Libraries	For Information

Summary

The Games have presented a huge opportunity for the City Corporation and for your Visitor Development Team (VDT) specifically. This report describes the many activities that they have undertaken to ensure a warm welcome for visitors, to mitigate issues of visitor displacement and to show the City, and the City Corporation, in its best light.

The report captures the headline projects that have helped fuel the success of the Games for the City and looks at the value of their legacy, suggesting, where known, future steps that will help ensure a robust and compelling future for the City's tourism sector.

It is the outcomes of this work that will inform the upcoming Visitor Strategy 2013/16 which – when drafted – will be presented to Members for their comment and approval.

Recommendations

Members are asked to receive this report for information.

Main Report

Background: the landscape

1. At the time of writing (August 2012), the Olympic and Paralympic Games are widely considered a success with the public's opinion described as "almost unremittingly positive"¹.
2. This enthusiasm has not been shared by London's attractions, hotels and retail (for the first week of the Games, at least) with shops reporting a 10.4% drop in sales on the Opening Ceremony Friday, hoteliers complaining about reduced occupancy levels, and members of the

¹ Source: <http://ukpollingreport.co.uk>; YouGov weekly *Sunday Times* poll

Association of Leading Visitor Attractions (national) seeing reductions in footfall of between 30 and 35% across the whole Olympic period.²

3. Such figures should, however, be considered in context of the well-publicised visitor displacement factor (which has had less impact than originally anticipated). That is to say, visits to London were up last year and in the early part of this, probably because people were anxious to avoid Games-time mayhem; it is these inflated figures against which comparisons are being made now and so losses are inevitable.
4. That said, by the second week of the Olympics, the fortunes of London's retail sector were reversed and many shops reported an increase in sales (a rise of 16.4% year-on-year for the West End)³. Attractions and hotels have seen a slower recovery.
5. The City-specific picture is no different. In the last week of July, the City Information Centre and two of our visitor attractions saw their quietest days on record, while City visitor attractions overall reported significant reductions in footfall for the Olympic period (up to 57%). In line with the West End, City retail reported an initial dip, with sales picking up by the beginning of August and showing a marked increase for the same period year-on-year.
6. For the tourism sector, the Games were always about legacy and the blip of recent weeks will be long forgotten if the anticipated boost to visitor numbers is realised. With the "turbocharge" proposed by Jeremy Hunt MP, this could see an extra 4.5m visitors to the UK in the coming years, leading to £2bn in extra spending and 60,000 additional jobs⁴.
7. Certainly, things could not be more positive, with the many Games-time volunteer programmes across the capital receiving ecstatic plaudits and the contribution these people have made to our visitor welcome inspiring three quarters of those asked (74%) in an Ipsos MORI poll to say that the Olympics has had a positive effect on their opinion of Londoners (55% attributing the overall success of the Games to the volunteers).⁵

Current Position

8. It is against this landscape that your Visitor Development Team has been working to achieve a number of strategic objectives in support of the City Corporation's response to the Olympic and Paralympic Games. They are:
 - a. To vigorously promote the City and its tourism offer ahead of, and during, the Games, so to exploit the Games-time opportunity while countering any potential threat of visitor displacement;

² Source: www.bbc.co.uk – Olympics hits London retailers as shoppers stay away, Will Smale, 31 July 2012

³ Source: *The Independent*, Monday 27 August

⁴ Source: www.bbc.co.uk – Olympics will turbocharge UK tourism, says Hunt, 15 August 2012

⁵ Ipsos MORI Political Monitor, 15 August 2012

- b. To proactively encourage new audiences to the City and to enhance the visitor experience for all who come here, so to widen our visitor demographic, generate positive PR for the destination City and incite recommendations and return-visits;
 - c. To communicate issues that could potentially affect our visitor services providers during Games-time and so enable them to prepare and respond positively;
 - d. At all times, to show the City and the City Corporation in their best light – be that to the billions watching on TV, to our national and London-based partners, to our local visitor services providers or to those here for the Games; and
 - e. To use the Games-time opportunity to test a series of potential service improvements and to harness the positive legacy of these, as well as of a number of external schemes, to the benefit of the City’s visitor industry in the years to come.
9. The activity that underpins the above objectives has been financed by a number of different sources and includes £375k in actual funding as well as significant in-kind support. Sources include:
- f. The generous awards by your 2012 Member Sub-Committee for specific projects as detailed in this report (£86k total);
 - g. £51k of the “contingency budget” agreed by your 2012 Member Sub, Policy & Resources and Finance Committees in early May;
 - h. Departmental contributions totalling £122k for corporate initiatives on which the VDT was leading (includes £100k from the City Bridge Trust towards *Celebrate the City*);
 - i. Sponsorship totalling £31k (Diocese of London, Land Securities and the Cheapside Initiative);
 - j. In-kind support from media partners for *Celebrate the City* with a total value of £180,000 (Magic FM, City AM, Executive Channel, Time Out and CBS Outdoor); and
 - k. £85k from the VDT’s local risk budget spread over two financial years (89% of annual budget)
10. This report briefly describes the main activities that have been undertaken, acknowledging the successes, challenges and lessons learned during their execution. Where appropriate, the legacy value of the activity is also suggested.

Visitor information activities

City of London Information Centre

11. The City of London Information Centre (CIC) was always going to have a significant role to play during Games-time – as the only official Tourist Information Centre (TIC) in central London and given its location opposite St Paul's and next door to the Paralympic family hotel (Grange Hotel St Paul's), it was perfectly placed to act as a central information hub for the marathons and to provide a warm visitor welcome for Paralympic dignitaries.
12. Acknowledging this, your VDT developed a strong and highly-rewarding partnership with Visit England who were keen to secure a presence for the national tourism product within central London. This partnership provided great benefits for both parties with free training for CIC staff in the tourism offer outside of London, a significant extension of the CIC's product knowledge and range (so bringing additional value to our customers), free promotion of the CIC as Visit England's official London home at Games-time and, in return, exposure for Visit England and the national tourism product within the CIC. In addition, the sharing of survey and mystery shopper costs that would ordinarily be met by the CIC alone also gave benefit.
13. While footfall at the CIC has dropped significantly over the Games themselves (see item 15), both Visit England and the CIC have acknowledged the success of the partnership and discussions are well underway about renewing agreements for 2012/13 and beyond. This is of significant value to the Centre as it not only provides official endorsement and so strengthens its position; it also delivers the benefits listed above and so increases our service levels and thus our value to customers.
14. Over the days of the Olympic and Paralympic Games only, the Centre extended its hours to 08:00 to 20:00 daily (from 09:30 to 17:30 Monday to Saturday and 10:00 to 16:00 on Sundays). This was in anticipation of increased visitor numbers and to ensure higher levels of access to visitor information for those out early to visit Games venues, or returning after a day at the Olympic Park. It was also a great opportunity to test the appetite of visitors at these periods and so potentially inform revisions to the CIC's hours of operation.
15. The results of this exercise were, however, disappointing with only 1,444 visitors served within the extended hours over the Olympic Games and 1,027 over the Paralympics. It should be noted here that so low were the early morning figures for the Olympic Games (153), that the opening time was revised to 09:00 for the Paralympics.
16. These figures can, to a large degree, be attributed to the significant and anticipated visitor displacement that was seen by many TICs and

attractions over Games-time. Those at Stratford, Newham and Greenwich all reported large drops in footfall and (for all but Greenwich) revenue, with only Kingston enjoying a 100% rise in visitor numbers and income. A full account of footfall for the CIC over Games-time specifically can be seen in appendix 1.

17. For the CIC, as well as for the other TICs cited above, the drop has not significantly altered year-to-date figures, because visitors were displaced from the summer months to spring, which saw record footfall and revenue. As appendix 2 illustrates, the totals for footfall, revenue and profit at the CIC are virtually the same as 2011-12, and significantly higher than 2010-11.
18. Another factor affecting these figures was the introduction of the many GLA-run Ambassador pods which, by serving visitors at strategic locations across London, negated the need for them to travel to the CIC for visitor information. Those pods in, or near, the City were located at the Tower, Liverpool Street Station, Spitalfields and Fenchurch Street Station, and your CIC played a major role in training the volunteers staffing them as well as supplying them with City-centric literature promoting our visitor offer (see item 33).
19. The CIC's role in the GLA-led *Welcome to London* programme is also worthy of mention. Aside from the Ambassador training described above, the CIC played a pivotal role in co-ordinating reporting lines between the pods, TfL Travel Centres and London's TICs. Hosting a reception at the CIC for all these groups, the CIC was able to establish and strengthen vital relationships with the visitor services operations of the GLA and TfL particularly and has, in partnership with Greenwich, taken a lead on co-ordinating on-going and regular meetings of TICs across London, at which issues of mutual concern can be discussed and potential partnerships explored.

Visitor literature: *Time Out Guide to the City and City Olympic Map*

20. Building on the success of the previous *Time Out Guide to the City*, your VDT produced a revised and updated 2012 version, with £50,000 support from your 2012 Member Sub Committee. The purpose of the Guide was to help mitigate visitor displacement by wrapping up the City's visitor offer in one small A6 publication, to be handed out at major events and to be distributed widely across London so encouraging repeat visits by those coming to the City for the first time (eg for the Marathons) and/or to drive footfall at a time when it was most needed. The Guide also sought to bring together and publicise the *Celebrate the City* event with the many one-off activities hosted by City partners for the Jubilee and for the Games. This it did via a dedicated central 8-page, pull-out section.

21. The 190,000 copies of the Guide that were produced were distributed: with the *Time Out* magazine (75,000) in April; at the CIC; at City attractions; through London-wide distribution runs in West End hotels, cafes, libraries, attractions venues and community centres; and by our on-Street Guides (see item 27). A significant quantity was also given to the City's four GLA Ambassador Pods. A full list of distribution channels is given below:

Distribution method	Quantity
Within <i>Time Out</i> magazine	75,000
City attractions and hotels (including City Information Centre)	47,200
Universities (on request)	900
On-street events	20,000
London Calling (London-wide distribution)	25,000
GLA pods	3,000
Distributed to date	171,100
Remainder (for on-going distribution)	18,900

22. While the shelf-life of the Guide was anticipated be around a year, its popularity has meant that only 19,000 copies are left to carry us through to April. This should be viewed as good news, as the Guide has been picked up or received on such a scale and to, what is presumed, many new audiences so as to provide future legacy and deliver increased footfall in future months.
23. With funds from the Chamberlain's contingency, your VDT also produced a City Games-time map (*Enjoy Summer 2012 in the Square Mile*) detailing the routes of the marathons, the Torch Relay, the GLA visitor trails, the City Big Busk sites (see item 46), the GLA pods and "Dazzle" sites (illuminated bridges) while promoting City attractions and events, as well as the revised hours of the CIC.
24. Approved by GLA, LOCOG, TfL, City partners and other bodies, the map was very favourably received and was preferred by GLA-pod staff to the GLA-produced (much larger and unwieldy) *Host City Map* – albeit this was particularly on marathon days when the City route could be most appropriately promoted. Such was its success (an amazing 40,000 were distributed at our on-street events such as the marathons) that it was reprinted twice to keep up with demand. Again, this was a publication that many will keep as a souvenir of their time in the City and, as such, brings with it the legacy of those audiences having a ready resource to encourage and aid any future trip here.
25. The map was distributed through the channels described in the table below and was used by many internal departments that had staff working on-

street as well at City-managed buildings (eg via Police or Parking Attendants and to tenants in City-Surveyor-managed properties).

26. Together with the provision of the map and *Time Out* Guide as a resource for uniformed on-street staff (to give out to visitors), your VDT offered relevant departments the opportunity to attend a series of briefings about Games-time activities helping to enhance the City’s visitor welcome further.

Distribution method	Quantity
City attractions and hotels (including City Information Centre)	34, 500
On-street events, via 2012 Street Guides	40,000
London Calling (London-wide distribution)	12,500
Internal (uniformed staff, City properties)	3,000
GLA pods	10,000
Total	100,000

2012 Street Guides

27. Working with your HR, Security and Contingency Planning and Internal Comms teams as well as the City of London Police, your VDT launched a staff “volunteer” scheme through which staff from across the organisation were trained in Games-time and City visitor information, security and public order issues. They were deployed on-street at the Jubilee, *Celebrate the City* and for Games-time events.
28. Overall 95 Street guides were recruited and deployed as follows:

Event	Quantity
Jubilee River Pageant	22
Jubilee St Paul’s Service	21
Celebrate the City Cheapside Fayre	32
Celebrate the City Sunday	9
Torch Relay	47
Men’s Marathon	60
Women’s Marathon	63
Paralympic Torch Relay	9
Paralympic Marathons	36

29. Instantly identifiable to visitors by their red bibs and bags, the Guides advised spectators about all that there was to see and do after the event had passed and handed out the previously discussed maps and *Time Out* Guides. Through your CIC and VDT volunteer co-ordinators, they also reported in via radio any potential security threats, cleansing issues and

incidents of ambush marketing or inappropriate commercial activity to the BOCC.

30. For each outing, Guides were prepared with information sheets and attended a half hour briefing ahead of their deployment. They received training that was run in modules and totalled a day.
31. The scheme was massively well-received by event organisers, police, stewards and staff volunteers alike, with the Jubilee providing the perfect rehearsal so that, by the first of the marathons, our army of volunteers was working like a well-oiled machine. Staff are eager to see it continued and early discussions are underway with the City Corporation's Employee Volunteering Programme to see how it can be incorporated, with roll-out planned at annual major events such as the Lord Mayor's Show and Cheapside Christmas Shopping Day – this is awaiting relevant approvals.
32. The training element of this scheme has gone particularly well and – together with the training provided to GLA pod staff – the City has been recognised for its ability in this area. To that end, discussions are also underway with the GLA about developing a training role for the CIC and our City-appointed trainers within their *Team London* volunteer scheme – this would have the benefit of us ensuring volunteers at London events outside of the City are able to promote City product. The scheme could also provide us with volunteers for large scale events.

GLA Ambassador Pods

33. As discussed earlier, the GLA sited 43 “Ambassador Pods” across London to help visitors with their enquiries over Games-time. The four “City” pods were located at Liverpool Street Station, Fenchurch Street Station, Tower of London and Spitalfields. Staffed by 342 volunteers in the City alone, training was given in three separate modules, the final of these being undertaken by your VDT and covering local visitor information.
34. Working with the Department of the Built Environment, your VDT provided invaluable help to the GLA in identifying pod locations and ensuring relationships were forged with local information providers (eg the Tower's Visitor Centre, Fenchurch Station staff etc). For each pod location they created a staff handbook highlighting the top attractions in the area and the locations of essential services such as cash machines and toilets, as well as developing key visitor facts and providing images for use on the pods as decoration. The City's *Time Out* Guide and Games-time map were also supplied to pod staff for distribution to visitors.
35. With support from your 2012 Member Sub Committee, training in local visitor product knowledge was provided by your VDT to the 12 City Ambassador Pod Location Managers, who in turn, were charged with training their volunteers. This training equated to a day in the locale of the

pod and resulted in the VDT developing a video about the City's visitor product (which could be shown at Managers' volunteer briefings). Such was the popularity of this film that it has been adopted by a number of the City's visitor attractions for use in their internal training programmes – helping front of house staff to promote the City's visitor offer and increase dwell time.

36. Again, these activities have helped to create an army of volunteers trained in the City's visitor offer, volunteers who have expressed significant interest in continuing their volunteering duties and who, it is likely, will join up for the *GLA Team London* initiative, as described in item 32.

IPC Welcome

37. The International Paralympic Committee (IPC) based themselves at the Grange Hotel St Paul's for the duration of the Paralympic Games. Ahead of their stay, your VDT worked with IPC staff to identify City venues (restaurants and hire spaces) for receptions and advance party events, as well as developed a welcome pack for delegates.
38. Working in partnership with the Cheapside Initiative and so sharing costs, the welcome pack was delivered to every room of the Grange in which IPC dignitaries were staying. The pack contained a newly-developed guide to the immediate vicinity, our seasonal events guide, *Time Out* Guide, self-guided walks leaflets, an Oyster card wallet promoting the CIC, City postcards and the *London Planner*.
39. Ahead of arrival, the CIC and the City's visitor website were vigorously promoted to delegates through IPC briefing communications and their delegates' website. This provided great endorsement for the CIC to a very influential group of international visitors.

Animations

Celebrate the City

40. The success of *Celebrate the City* is widely known amongst Members and at your last meeting, a top-line evaluation of activity was tabled. This showed target audience figures to have been significantly exceeded and a huge legacy of networks including those of presenting partners, the media and City Corporation departments.
41. Without doubt, *Celebrate* was a populist event and attracted a new demographic for the City with significant representation of families and those from diverse ethnic backgrounds. It is hoped that these audiences can be harnessed and built upon.
42. It also established a new and significant partnership between the City Corporation and the Diocese of London which the churches are committed to developing in the future. The involvement of the Diocese was critical in

steering the shape and financing of the project, and ensuring that it met the needs of all the participating partners.

43. The future of the event is as yet undetermined. Members have suggested that it might become a biennial event and there has been some thought given to the idea that it might be developed by the City Arts Trust as part of the City of London Festival. It needs to be carefully considered how best to ensure that the fully collaborative basis of the project can be continued.
44. Whatever is to happen, it is unlikely that it could take place again without significant funding and staff resource being identified. This was provided, this year, by your 2012 Member Sub Committee, the Diocese and the City Bridge Trust as well as the local risk budget of the VDT and contributions from participating departments (both directly in marketing budgets and in-kind, particularly extra staff commitment).
45. Of significant legacy, *Celebrate* marked the trial of a market in Guildhall Yard (this being one of the few places in the City where on-street trading is allowed). The success of this has led the Cheapside Initiative to bring a Christmas Market to the Yard for their Traffic Free Shopping Day in December, fulfilling, in part, your VDT's remit to animate the Yard as a vibrant public space.

Big Busk

46. As part of our efforts to animate the City for visitors over Games-time, your VDT developed a partnership with the GLA's *Big Busk* organisers – a competition open to musicians of any age who are given a stage (usually this is in underground stations) on which to perform, with audiences voting on their favourite act.
47. For a contribution of £5,000, the provision of all licensing (a further £1,000) and the co-ordination of props storage, the GLA worked with the VDT to identify six sites where it was anticipated the City would be most busy at Games-time – these were at Monument, opposite St Paul's, at Royal Exchange and outside Fenchurch, Cannon Street and Liverpool Street stations. With sites running at different times depending on anticipated visitor flow, performances took place Monday to Friday only from 27 July to 24 August inclusive.
48. Some sites proved more popular than others and, in a bid to benefit the greatest number of visitors, Cannon Street and Fenchurch Street Station sites were closed and performances relocated to the busier hubs. All in all 345 hours of music filled 690 performances over 4 weeks - that's 172 performances per week or 35 performances per day.

49. Around 154,000 people passed close by or stopped and watched a City *Big Busk* performance, with St Paul's being the most popular site welcoming an estimated audience of around 79,000 over the period.
50. The legacy of this project is three-fold. Already, early soundings have been taken about an on-going collaboration that will help to give colour to the City for our summer visitors. Furthermore, sites at which performances of this nature can, and do, work and the best times to schedule them have been established, with the potential of Guildhall Yard being an additional site next year, so further fulfilling your VDT's remit to animate this space.

Marathon animations

51. Working with London Marathon Limited (LML) and City churches, your VDT worked to ensure the City was presented at its best on the various Marathon Sundays – a day of the week which, as many will know, is very quiet for the City but on which it has the capacity to welcome visitors in their thousands, the working populace being absent.
52. For the cost and organisation of the licensing and site logistics, LML provided musical entertainment for audiences at each marathon. The details of these are given in appendix 3, but in headline, eight bands performed at eight City locations for the Women's and Paralympic Marathons and seven at the Men's. These bands helped keep spectators entertained in the build-up and between laps of the race.
53. In addition, the City Corporation and LML worked with the City's churches to help add a sense of occasion to events with full peals of bells from six City churches (lasting up to four hours).
54. In addition and in a bid to encourage pubs to open on the Sundays, LML developed a pub pack and brokered relationships between pubs and private event organisers to ensure that the City did not look closed. Underpinning this, your VDT wrote to all shops, bars and cafes in the City and attended a number of meetings of retail consortia to further excite interest in Sunday opening. The results of these efforts were disappointing and, although more than the usual number opened, the City was still unable to shake off the sense of being a weekday destination.
55. That said, retail figures have been reported as being up for Sundays by those shops that usually do open, giving as good evidence base that can be shared with more apprehensive retailers when future events are planned for the weekend.

Bandstand Marathon

56. The Bandstand Marathon is a Department of Communities and Local Government led project which was endorsed by Eric Pickles in a letter to the Town Clerk earlier this year, advocating City participation. The project

has run since 2008 and brings live music performance to bandstands and outdoor performance spaces across the UK – all at the same time on the same day for four hours.

57. The project was due to be realised on the 9 September in Exchange Square (provided free of charge by Broadgate Estates) once the Paralympic Marathon had passed. However, following a number of problems with the organisation of the event, it was agreed with the organiser Superact not to proceed.

Communications

58. In preparation for the Games, your VDT hosted or attended meetings with City hotel managers, attractions and retail to explain anticipated impact and ensure business continuity. At these presentations, TfL and other strategic Mayoral bodies were invited to speak.
59. In follow up, essential communications from these bodies were forwarded on a very regular basis throughout the Games to these groups. So much so, that some feedback suggests that they were too many and too frequent, so were ending up being ignored.
60. On a positive note, the on-going communication with these partners has helped establish forums and strengthened relationships.

Proposals

61. Members are asked to receive this report for information.

Consultation

62. The Managing Director of the Barbican has been consulted in the writing of this report (re *Celebrate the City*) and his comments incorporated.

Conclusion

63. This has been an exceptional year for the City, for London and for the nation and, as such, has presented an exceptional set of opportunities for the City Corporation, especially in the realm of tourism.
64. This report describes the activities undertaken by your Visitor Development Team (VDT) to seize those opportunities and to build a compelling and robust legacy for the City's tourism sector in the years to come.
65. This work is by no means complete and the next challenge for the VDT is to work at harnessing the future potential of the projects described here. These will be reflected in the upcoming revised Visitor Strategy 2012/16 later this year.

Appendices

APPENDIX 1: Footfall at the CIC during the Olympic and Paralympic Games

APPENDIX 2: CIC year-on-year comparison (Apr-Aug)

APPENDIX 3: Bands performing at City locations in the Games-time
Marathons

Contact:

Nick Bodger / Nick.Bodger@cityoflondon.gov.uk / 020 7332 3263