

Draft Tourism Strategy – Foreword

Welcome from Councillor Marilyn Ashton, Portfolio Holder for Planning, Development and Enterprise.

It gives me great pleasure to introduce this second tourism strategy for Harrow. It's arrival coincides with the start of a very difficult economic period and a great deal of uncertainty. At this time, we recognise more than ever, the importance of building strong working partnerships to support business and our local economy. In this respect, the new strategy marks the culmination of an extensive process of preparation and consultation with both local and regional stakeholders and I would like to thank everyone who gave their time to participate in this process.

Despite these challenges, we are proud of the part Harrow plays in London's standing as a world-class city. Our attractions include the world-famous Harrow School, the award-winning Grim's Dyke Hotel, the 14th century Headstone Manor and the beautiful St Lawrence Church and neighbouring historic Canons Park. We also offer a green belt area equivalent to eight Hyde Parks with three of our parks achieving Green flag status in 2008 and three more to follow in 2009. The borough's good quality value for money accommodation, low crime levels and excellent road and public transport links combine to make Harrow one of London's most accessible and desirable boroughs. We want to ensure that this high quality of life is sustained for both our residents and visitors into the future.

This strategy will also help Harrow to take an increasingly pro-active role in attracting and accommodating the growing numbers of visitors to London. In 2012, the world's attention will be firmly fixed on the capital and we want all our communities to feel a part of this momentous occasion as it is our ethnic diversity which will send out the most welcoming message to competing nations.

Achieving the aims of this strategy at this time will require greater collaboration between the private and public sector and we look forward to strengthening our links with our attractions, hotels and voluntary groups. We remain cautiously optimistic that through the strength of our partnerships, we can promote Harrow as not only a gateway but also as a destination of choice for visitors over the coming years.

This first draft of the tourism strategy will go to cabinet on 12 February 2009 and will be followed by a one month period of consultation to take place between 16 February – 16 March 2009. The consultation plan timetable is set out in Appendix B. The final version of the strategy will also include council structure/ risk assessment and an equality impact assessment. The final strategy is scheduled to go to cabinet on the 12 February 2009.

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Harrow Tourism Vision 2009-2012 – Executive Summary

By 2012, we still expect tourism to play a positive role in supporting the local economy by creating local employment opportunities, improving local facilities and bringing our diverse communities together in a united feeling of civic pride in our borough. By offering a quality experience for the visitor in terms of accommodation, facilities, attractions and local welcome, Harrow will become a more attractive choice for visitors to London.

Visitors help to support leisure and cultural facilities, they add vibrancy and vitality to town centres and have a marked effect upon our local economy – in the case of Harrow this represents £160 million a year*. Tourism is also one of the few council departments to actively bring money into the local economy as well as supporting local jobs for local people and uniting our communities.

The Olympic Games will represent the biggest event in UK history and is expected to provide a £2 billion boost to the UK economy. However, 2012 also provides a major catalyst for improvement in the tourism sector, with for the first time, increased government funding in many key areas. From improving the quality of our accommodation to providing better signage and addressing customer service issues, this strategy will ensure that Harrow is able to reap maximum benefits from the once in a lifetime opportunity that the Olympic Games represent.

Harrow's excellent transport links, lack of congestion charge, free parking facilities and green and leafy suburban ambience all combine to make it a very popular base for visitors to London. The re-opening of Wembley Stadium has had a major impact on hotel occupancy rates with hotel rooms selling out within hours of concert tickets going on sale. However Harrow is also now used as a base for events at the O2, rugby matches at Twickenham, Wimbledon and London Fashion Week. Two new applications for town centre based hotels have been received in the last year. While we recognise that this process will take longer to happen in the current financial climate, it is still an important aim to bring more trade to our businesses and a greater vitality to our town centre.

The new Harrow tourism strategy will be closely linked to other council strategies from the areas of Economic Development, Planning, Community Development, Cultural Services, Environment and also links to the Council's new corporate priorities in respect to "building better communities" and creating "cleaner and safer streets." This new strategy also seeks to work closely with Communications and other related council departments to create a seamless approach to marketing Harrow to residents, visitors and to boost inward investment opportunities.

Overseas visitors account for approximately half of Harrow's total tourism expenditure, with this figure rising from £71 million in 2004/2005 to £81 million in 2006. Harrow's large Indian demographic provides a vital link to the world's strongest emerging market and the new strategy will focus attention on developing this link in the build up to 2012. In the current financial climate, it is also important to note that London will become a cheaper destination for international travel and is therefore capable of attracting many new overseas visitors who have previously been deterred from visiting due to the cost factor. On the reverse side of the coin, resources will also be targeted at promoting the local area to Harrow's residents and influencing their visiting friends and relatives (VFR).

***based on research from the London Development Agency Economic Impact Model 2006.**

As yet it remains unclear what the full impact of the credit crunch will be over the coming three years. However, Harrow's population is still due to undergo substantial growth and there is therefore a need to create local jobs for local people. Tourism is the second fastest growing industry in the UK after the financial services sector and this strategy will seek to work with all sectors of Harrow's communities to up skill our workforce and make effective use of our rich resources of cultures and languages. The increased emphasis on volunteering opportunities, one of the key strands of the Olympic legacy, provides not only a chance to bring our communities together but also provides a vital stepping stone into work for people trapped in long-term unemployment.

All of the ideas in this summary are developed in further depth within the main strategy document along with a comprehensive action plan to ensure implementation over the course of the next three years.

Tourism Context

. The strategy is set within the context of The Mayor's Tourism Vision for London (2006-2016), and the London Development Agency's (LDA) West London Tourism Strategy and Action Plan (WLTSAP) which includes Harrow. The strategy is also set in the more immediate context of the Department for Media, Culture and Sport's (DCMS) Tourism Strategy for 2012 and Beyond. Being one of the very few Councils in West London to offer a dedicated tourism service, Harrow plays a significant part in West London's tourism development and also enjoys a close working partnership with Visit London, the official marketing organisation for London.

These external strategies aim to continue to promote London as a world-class destination for visitors and create an awareness of the outer boroughs in order to disperse the high volume of visitors away from central London. Following London's success in the Olympic Bid, there is also an increased focus in driving up the quality of the visitor welcome which ranges from skills and training through to providing high quality accommodation. The new visitor strategy is therefore designed to ensure that Harrow continues to benefit from these initiatives.

The Council has a wide and far-reaching role in facilitating, enabling and improving the visitor experience and has already played a leading role in the key achievements outlined later in this document. This strategy is designed to further focus key public and private sector agencies responsible for tourism delivery to ensure an integrated approach to Harrow's tourism development over the next three years. This strategy is linked to a number of internal strategies as summarised below.

The Local Development Framework (LDF): replaces the Unitary Development Plan (UDP) as the current statutory development plan for the borough. The LDF places a strong emphasis on spatial planning which considers an area from a social, economic and environmental perspective. It also identifies inter-dependencies and relationships between different policy areas including tourism.

The Corporate Plan (2008-2011) the Corporate Plan sets out the Council's high level priorities and targets for the coming years. The Council is seeking to become recognised as one of the best London Councils by 2012 in a borough that is cosmopolitan, confident and cohesive.

Sustainable Community Plan (2006-2020) The Sustainable Community Plan shows how the organisations making up the Harrow Strategic Partnership (HSP) will try to shape the effects of global, national, regional and local trends and events to work towards successful outcomes for Harrow.

Community Development Strategy (2007-2010): the Community Development Strategy will contribute to the Council's strategic vision as outlined in the Corporate Plan. In partnership with the voluntary and community sector (VCS) and other agencies, it focuses on how the skills,

awareness, knowledge and experience of the community, can be harnessed and utilised in order to build a stronger foundation for community development and cohesion in the borough.

Enterprising Harrow Strategy (EH) (2007-2016): the EH strategy focuses on making Harrow a more business friendly borough which will ultimately encourage investment and reinvestment in the borough from employers. The strategy also focuses on making sure the conditions are right for small and medium size enterprises (SME's) to develop and grow and to ensure that residents skills levels are able to meet future needs.

Cultural Strategy (CS) (2006-2008): the CS strategy aims to help improve quality of life by widening opportunities for participation and enjoyment. It also aims to promote conditions for a culturally inclusive Harrow, stimulate the cultural economy and its contribution to making Harrow a vibrant and exciting place and promoting Harrow's cultural assets including: people, buildings, spaces and achievements. A new updated cultural strategy will be created in 2009.

Championing Harrow Action Plan (2007-2012): created in 2007 as part of the Council's commitment to maximising the benefits of the Olympic Games for local businesses, voluntary groups and residents. Tourism is linked in with the local business work-stream and regular meetings with the wider business community are already taking place.

Harrow Corporate Priorities – September 2008

In September 2008, the Council issued the following new Corporate Priorities which link to tourism in the following ways:

Building stronger communities: "in partnership with the voluntary and community sector (VCS) and other agencies, this priority focuses on how the skills, awareness and knowledge and experience of the community can be harnessed and utilised in order to build a stronger foundation for community development and cohesion in the borough. This links to the aims and objectives of encouraging volunteering opportunities in Harrow and increasing civic pride in our residents.

Cleaner and safer streets: to improve performance and help deliver cleaner streets, service delivery patterns have been reviewed. Additional resources will also be focussed on the town centre, shopping areas and known litter spots. The town centre is one of the main gateways into Harrow and cleanliness is therefore very important in creating a positive first impression for the visitor. Other key tourism sites in the borough also need to be monitored on a regular basis for cleanliness. In the early part of 2009, St Ann's Road, College Road, Station Road and the Station Road part of St. John's Road will all be given a facelift to improve the general trading environment of the town centre. .

SWOT Analysis

The following data has been identified following consultation with the Harrow Tourism Forum which includes community groups, attractions, hotels, B&B's and also council members.

Strengths

- On the doorstep of Wembley Stadium
- Excellent public transport and motorway links
- No congestion charge zone
- Significant green belt area
- Low crime area
- Strong heritage offer
- Free car/coach parking facilities at the majority of attractions/hotels

Weaknesses

- Geographical locations of attractions and insufficient public transport
- Town centre car access difficult
- Negative attitude towards town centre and transport hub
- Not enough entertainment facilities in the borough

Opportunities

- Future investment and re-development of Harrow on the Hill transport hub
- Business Improvement District (BID) proposal
- 2012 Olympic Games
- Impact of Wembley Stadium
- Heightened emphasis on Tourism in the Enterprising Harrow Strategy and Local Development Framework

Threats

- Credit Crunch
- Lack of funding for investment in tourism
- Competition from surrounding areas in West London / Hertfordshire/Bucks
- Threats from terrorist attacks
- Change of local and national government priorities on tourism
- Lack of sustainable funding for town centre if BID fails

Harrow Tourism Profile

Situated in north-west London, Harrow is a thriving and culturally diverse outer borough bordering leafy Hertfordshire on one side, yet within speedy rail access to central London. Lack of congestion charge and free parking facilities make Harrow a very popular base for visitors attending events elsewhere in London and the surrounding area.

With a green-belt area equivalent to eight Hyde Parks, Harrow prides itself on the quality and quantity of its open spaces. From the historic Canons Park to the expansive Bentley Priory Nature Reserve, the borough offers unbeatable opportunities for walking, strolling and taking part in sport. Three of our parks have now achieved Green Flag status and three more are currently being considered for this award. The borough also boasts three top quality golf courses all within easy access of central London. Harrow is also home to one of London's last remaining skateboard parks, which attracts visitors from far afield.

Harrow is of course known for the world-famous Harrow School, which welcomes 8-10,000 visitors per year. However Harrow's other heritage gems include the 14th century Headstone Manor at Harrow Museum – previously part of the estate belonging to the Archbishops of Canterbury, Grim's Dyke Hotel, former residence of W.S. Gilbert of Gilbert & Sullivan fame, St Lawrence Church, site of a stunning continental baroque interior, St John the Evangelist Church, final resting place of the Fourth Earl of Aberdeen, W.S. Gilbert and Sir John Wolstenholme. In addition, Harrow also boasts RAF Bentley Priory, the nerve centre for the Battle of Britain during World War 11 and West House in Pinner Memorial Park, soon to become a museum and art gallery to house the Heath Robinson collection.

Harrow has a wide selection of excellent, value for money accommodation ranging from the award-winning Grim's Dyke Hotel - a country house retreat on the border of Hertfordshire, to the modern centrally situated town centre hotels. Harrow also has a growing number of guest-house and bed & breakfast accommodation, ideal for short stays at a reasonable price. Harrow's hotel occupancy rates have sharply increased due to the re-opening of Wembley Stadium. However Harrow benefits not just from sports events and music concerts but also from the high-yield conference, business meeting and events market and it is for this reason that the stadium is included in all tourism promotional activity. While there has been two new hotel applications received this year, the credit crunch will obviously impact on the progress of any new developments over the course of the next year. However the recession also provides an opportunity to encourage local people to make the most of the attractions that are right here on their doorstep rather than spending their money on overseas locations.

Since the inception of the first tourism strategy in 2005, considerable progress has been made to put Harrow on the map. The new strategy will be seeking to build on these foundations in partnership with our voluntary groups, businesses and attractions all of whom have provided substantial support to the achievements of the first strategy.

Key Achievements 2005-2008

- Tourism Officer post made permanent by Harrow Council
Tourist information services: visitor management
- 42% Improvement in tourist information service to visitors (conducted via annual Visit Britain mystery shopper exercises 2005-2007)

- Visit Britain customer service training implemented for Council reception, library counter staff and front line hotel reception staff
- Town centre tourist information service being established at the new Gayton library
- Strategic road signage implemented for Grim's Dyke Hotel
- Road Signage enhanced for Harrow Museum
- Road signage improved at South Harrow road junction
- Annual product training familiarisation trips instigated since 2005
- Implementation of the West London Tourism Toolkit for training purposes

Accommodation development

- 20% increase in Harrow accommodation becoming quality assessed
- Increased number of B&B's in the borough
- Westminster University Halls of Residence – quality assessed in 2007
- Promotion of quality-assessed accommodation only in the Discover Harrow Visitor Guide
- Substantial increase in queries from prospective B&B and hotel developers
- 28% increase in revenue per available room from 2006-2007
- 25% increase in hotel occupancy between 2005-2008

Marketing and Promotion

- 57% increase in visitor spend between 2005 and 2008 (£92.6 million - £161 million)
- 2000 hits per month generated from the Visit Harrow website
- Brand new podcast produced for Harrow on the Hill
- £100,000 worth of PR revenue generated from West London Movie Map
- Production and launch of the Discover Harrow Visitor Guide – the only destination guide in circulation in West London
- Participation in the Visit London Villages campaign (2007) and Outdoors campaign (2008) resulting in a return of investment (ROI) ratio of 16.83:1 and 46.25:1 respectively
- Participation in CONFEX 2007 & 2008 (the leading trade event for conference and meeting organisers)
- £10,000 worth of revenue raised from post-CONFEX business familiarisation trips
- Regular bi-monthly e-communications established with the business travel trade
- National, regional and local press participation in press trips including *The Guardian*, *The Sunday Times*, BBC Radio London and the specialist travel trade.

Partnership working

- £30,000 contributed from local businesses and voluntary organisations to fund marketing activity and to host a wide range of events from tourism forums to familiarisation trips.
- Regular quarterly Harrow Tourism Forums involving the participation of voluntary organisations, hotels, residents' groups, Harrow Chamber of Commerce and other external stakeholders
- Regular bi-monthly progress meetings with the Harrow Tourism Action Group (TAG)
- Over 50 voluntary / private sector stakeholders participating in "residents' week"
- Expansion of residents' week to a West London sub-region event in April 2008
- Demonstrable evidence of hotels and attractions now working together.
- Partnership working with Hammersmith & Fulham, Harrow, Brent, Hounslow, Hillingdon and Chiltern District Council
- Joint local press marketing campaigns with the Harrow Observer

Volume and value of tourism in Harrow

Since the first Harrow tourism strategy, estimates from the LDA's Economic Impact Model have demonstrated a marked increase in tourism expenditure from £92.6 million per annum in 2005 to £161 million in 2006. However it is likely that the credit crunch will have an impact on the figures for the next three years.

Visitor Type

The Economic Impact Model also shows that overseas visitors contributed half of the overall expenditure (£81 million), while day visitor's contribution was approximately £59 million. Domestic overnight stay visitors accounted for the remaining £21 million. As seen in other London boroughs, domestic visitors provided the smallest share of tourism expenditure. Expenditure by UK overnight tourists fell from £36 million in 2004 to £23 million between 2005 and 2006. This reflects the national trends with the expenditure in the UK as a whole declining by more than 20% between 2003 and 2006. While more people than ever are taking day trips – many of these for shopping trips – fewer are choosing to stay overnight in UK destinations. It is hoped that the 2012 Games will offer the opportunity to boost the number of UK residents taking longer holidays at home through the heightened interest in games-related activities in different parts of the country. It is anticipated that the impact of the credit crunch will also encourage more local tourism as consumer confidence continues to remain low.

The increase in the volume of overseas visitors mirrors the trends across London, which has seen an increase of 14% in international visitors visiting the capital. The largest contributors to growth in European visits to London were those from Poland, Spain and France. These figures are however eclipsed by the increase in visits from “emerging markets” which have increased by a staggering 60% in the last five years. In 2006, for the first time, the UK received more visits from India than from Japan. Bearing in mind Harrow's strong Asian demographics, this could be a crucial market to target for future economic growth.

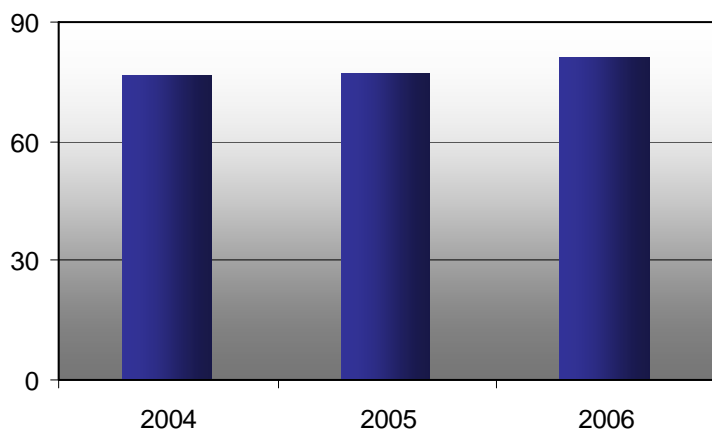


Chart 5 – overseas tourism expenditure in Harrow (£millions)

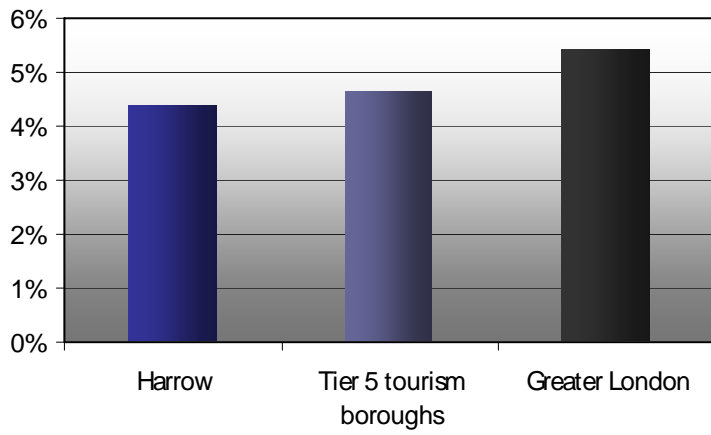
Employment

The Hospitality, Leisure, Tourism and Travel (HLTT) sector supports 280,000 jobs in London including transport and travel, hospitality, retail, accommodation, visitor attraction and performing arts. Tourism is the second fastest growing employer in London after financial services. Tourism in Harrow impacts on a range of employment sectors contributing towards 3,427 jobs in the borough.

The tourism employment ratio in London (excluding Westminster and Kensington & Chelsea is 4.8%.) The London Plan recognises that for every 1,000 residents, 230 new jobs are created. Harrow's population is expected to increase by 10,000 in the coming years with a total of 2-

3000 new jobs needed to cover this increase in population. The creation of local employment opportunities within the tourism and hospitality industry is an important part of filling this gap which will be more difficult in the current financial climate.

Chart 6 – Proportion of tourism related employment in 2006



Impact of 2012:

The 2012 Games will create a once in a lifetime opportunity for London to showcase itself to the rest of the world and current estimates have forecast that the Games could generate an estimated £2.1 billion pounds in additional tourism benefits over the period from 2007-2017. While these forecasts could be affected by the current economic situation, there is still great scope to target the “visiting friends and relatives” market both domestically and internationally, as this may be one of the most cost-effective options for visitors during an economic downturn. Recent research has demonstrated that 72% of visitors are expected to benefit from these local connections. London will be following in the footsteps of other destinations which have successfully used the Olympic Games to showcase their tourism offer and substantially boost their visitor numbers.

- Barcelona's 1992 Games helped propel the city from the 16th to 3rd most popular short break destination in Europe and doubled the number of international visitors during the following decade.
- Atlanta 1996 added 5.1 billion US dollars to the Georgia economy, generating US\$1.5 billion spend from out-of-state visitors.
- Sydney's 2000 Games advanced "Brand Australia" by 10 years, stimulating 1.6 million "Olympic-Induced" visitors between 1997-2004 and generating £1.5 billion for Australia's visitor economy.

The timetable of action over the following years is outlined below:

2009: Building momentum by showcasing London and Britain to international event planners and integrating the Games into all Britain brand and public diplomacy activities.

2010: Galvanising Britain by encouraging business to “roll out the red carpet” to visitors. A new travel writer's centre will be established for the world's media and relationships with Canada and India will be established to link with the Winter and Commonwealth Games. The London 2012's official Volunteering Programme launches this year.

2011: Inviting the world to visit: highlighting our many attractions and allaying any fears regarding building works etc. Post-Games marketing opportunities will be refined at this point. Olympic and Paralympic Games tickets go on sale.

2012: Providing a great welcome and comprehensive information to all Games visitors, supporting UK businesses in ensuring they enjoy their time in Britain. Excellent hospitality will be provided for targeted world travel leaders and full support will be given to the world's media. The actual Games take place from Friday 27 July to Sunday 12 August and the Paralympic Games start on the 29 August to 9 September 2012.

Guiding principles for the new tourism strategy

In this new strategy, the guiding principles will focus on three main areas that include partnership working, improving the quality of our tourism offer and also ensuring that tourism development continues in a sustainable manner that does not exceed capacity. These areas are looked at in further depth in this section.

Partnership working: By pooling resources together, partnership- working leads to a more effective way of delivery with decisions made from a wider knowledge and skills base. This is particularly the case with regard to tourism training courses where input from hotels and other hospitality providers is needed to guide the format of training courses. During difficult economic times it is also important that businesses work together to offer added value and retain repeat custom.

It will be important that the town centre businesses collaborate with the town centre hotels to ensure that footfall in the town centre is maximised. Closer collaborative efforts also need to be developed in the areas of volunteering, training and skills and also in the crucial areas of planning and inward investment to ensure that tourism development becomes fully integrated into the borough's future economy.

Improving Quality: Harrow needs to gain a competitive edge over its neighbouring boroughs by ensuring a high quality experience for its visitor. Cleanliness, safety, good quality amenities, accredited attractions and accommodation will combine to offer a tourism product that will be capable of attracting repeat business and establishing a positive reputation for the borough. Within quality enhancement there also needs to be a greater recognition of the needs of the disabled traveller. The specialist sports facilities at ASPIRE, are a very positive strength for the borough in terms of being able to attract Paralympic pre-training camp activity. 4,500 disabled athletes and disabled visitors will come to the Paralympic Games and many will want to attend other events and attractions. However, there is only a very small proportion of UK hotel rooms or guest-houses which are wheelchair accessible. We therefore need to draw attention to the needs of travellers with disabilities and ensure that the recognised code of practice - the Disability Discrimination Act (DDA) continues to be used in any new hotel developments /attractions and that changes can be made wherever possible to existing accommodation stock.

3.Sustainability: Harrow's tourism development must not exceed capacity particularly when bearing in mind the population growth, which is forecast for Harrow town centre in the coming years. Actions taken therefore need to promote and facilitate good quality design, be sustainable and consistent with our plans. Economic sustainability also recognises that local economies are subject to change and plans may need to be refined to take account of this. The population projections show that we will need to accommodate 10,000 more people in the borough by 2026 and build in excess of 4000 new homes. As mentioned in the Enterprising Harrow strategy, "whilst there is a definite need to increase the supply of housing this should largely be on land designated for housing use, with the limited release of employment land after strategic review." Applications have already been received for hotel development within redundant town centre office space, which would not only increase both the vitality and footfall in the town centre but also create more local jobs for local people.

In order to improve the long term economic, social and environmental sustainability of the borough it is important to ensure that we are attracting a wider spread of visitors across the day and evening, throughout the year and around the borough.

It is also important that both our accommodation suppliers and also our attractions are aware of best practice in terms of environmentally sound working practices such as the recently published "Green Tourism Business Scheme." Harrow should also take advantage of The Mayor of London's global role in tackling climate change to make London " a sustainable world

city". Harrow's excellent public transport links, wide open green spaces and the policy of encouraging Londoners to stay and enjoy different aspects of their own city could all be used to positive effect to market Harrow more successfully to local audiences. As part of the sustainability agenda, it is also important that we encourage local businesses to use local services in order to ensure that more local money stays within the local area. The council has been instrumental in creating new business forums and linkages with Harrow in Business to ensure that networking opportunities are created.

Marketing & Promotion

Harrow brand: in order to market Harrow externally to a number of different markets, there is a need for closer joint-working with individual departments and with the Council's communications team to provide a more seamless approach. The Council's desire to encourage inward investment opportunities has a similar aim to increasing tourism expenditure and uses similar marketing techniques with attendance at trade shows being one of the prime examples. By working more closely together and creating one single identity for Harrow in our marketing material, the "Harrow" brand will become more established in a shorter time-span and will gain greater credibility to our diverse audiences. In terms of market research, the new tourism strategy will be seeking to use the new customer insight programme to help understand and target market segments identified in this new research.

Local Londoners:

We will also focus this attention on 'staycation' –the new trend for hard up families in Britain to holiday at home. We will therefore look to encourage Londoners who want to get away from the city for a long weekend but who do not want to pay hidden charges of low cost flying or get stuck in a motorway traffic jam. We will also promote our other strengths which include our heritage attractions such as Harrow School, excellent restaurants and the borough's 'unlimited legroom' in our expansive green belt. We will position this as a 'weekend in the country without leaving the city'.

It is therefore vital that we continue to develop local knowledge and pride in our city, all the more so during these uncertain times when consumer confidence is low. The Olympic Games therefore provides a positive focus for our communities and an opportunity to enjoy the facilities and resources that are right here on our doorstep. Some host cities have seen a reduction in domestic visitors because people fear the area will be dominated by building sites in the run-up to the Games or overcrowding during them. Defying the displacement effect is therefore a major challenge in the important lead-up to the Games. Encouraging residents to spend time in their own boroughs rather than going further a field means more money is retained in the local economy which is all the more important during an economic downturn. Visit London has already initiated specific marketing campaigns aimed at Londoners including the "London Villages" campaign in summer 2007, which transformed Trafalgar Square into a village green and more recently in 2008, the "great outdoors" campaign. Both campaigns highlighted in innovative ways the different aspects of the city that are right here on our doorstep. Harrow's obvious strengths include our heritage offer, the borough's expansive greenbelt area and also our award-winning restaurants which range from Michelin rated haute cuisine through to great value for money ethnically diverse offerings such as Wealdstone's MASA – (Time Out award-winner for Best Cheap Eats.)

Average spend for tourism day trips to London is approximately £28.50. Of the 130 million tourism day trips taken in London each year, over 95 million are taken by Londoners and 68% of day trips by Londoners are to London. The table below demonstrates average spending on leisure items:

London's spend on leisure items

Area of expenditure	% above UK average
Restaurant and cafe	40%
Alcohol drinking outside the home	12%
Watching and participating in sports and leisure	31%
Cinemas, theatre and other entertainment	30%

There is however a decrease in overnight stays from UK residents. There is an expectation that the hotels will be hardest hit during the credit crunch and we therefore need to improve the offer to visitors by offering added value for money. For example, the Grim's Dyke Hotel currently markets itself as an easily accessible, affordable country retreat for Londoners who want to get away from it all for a weekend but want to avoid the lengthy motorway queues on Friday and Sunday nights. Working collaborations between hotels and leisure attractions could also create mutually beneficial packages to maximise the benefits of repeat visitors who regularly visit the borough. Current collaborations include hotels working with private gyms and golf facilities to create one day visitor passes and this type of initiative could be extended to other businesses. There are also opportunities for joined up working between tourism and cultural services to expand the leisure passport project not only to residents but also to repeat visitors and visiting friends and relatives.

In terms of local Londoners and our resident population, there is a great deal of scope to promote the value for money and free events and activities that take place in Harrow. In particular, our extensive green belt area offers opportunities for local walks, exercise and family activities in a wide variety of parks, wood and heathland areas. Harrow is also home to London's only subterranean skateboard park. St Lawrence and St John the Evangelist Churches offer free guided tours throughout the year. Harrow Museum offers low cost guided tours, exhibitions and jazz afternoons. The Harrow Arts Centre also offers a wide diversity of performances, classes and events at competitive prices without the need to pay the congestion charge or public transport costs to venture into central London.

International visitors and visits from friends and relatives (VFR)

Of the £161 million of tourism spending in Harrow in 2006, overseas visitors contributed half of the total expenditure (£81 million) while domestic day visitors contributed £59 million pounds and domestic overnight stay visitors contributed £21 million. While this expenditure is expected to increase over the coming years, the current economic decline must also be taken into account in any future forecasts.

Harrow's ethnic diversity is undoubtedly a great resource for inbound tourism as foreign expatriates living in Harrow are likely to invite friends or relatives back in their country of origin to visit them. The International Passenger Survey reports that in 2003 nearly 7 million inbound visits were to see friends and relatives (that's 28% of all visits), accounting for £2.64 billion of spending. The multicultural environment of Harrow is a welcoming message for overseas visitors regardless of the purpose of their visit. Bearing in mind the loss of consumer confidence of late, saving money on accommodation by staying with family and friends is likely to be a growing trend at this time. Added to this, the decreased value of the pound will make the UK a cheaper option for overseas visitors who may well have been put off visiting London before due to the expense involved.

British tourism does not simply benefit from the spending of those coming to visit friends and relatives. The hosts will also participate in at least some of the leisure activity that their visitors undertake during the period of the visit, be this eating out at a restaurant or visiting an attraction. Furthermore, the local economy will benefit from other indirect expenditure by the host on items such as groceries.

According to demographics from the 2001 census, nearly a third of Harrow's residents were of Asian or Asian-British origin (over 63,000 people in total.) The Indian group is the largest ethnic minority group in Harrow with over 45,300 Indian people in Harrow according to the 2001 census. India is currently one of the fastest growing world economies with the Indian middle class already the size of the entire US population and growing by around £30 million per year. The average length of stay is 26 nights and the average spend per person visiting is £856.00. The Indian market is very much linked to visiting friends and relatives with 50% of Indian visitors overall staying as a free guest with friends and family when they visit the UK. Family and friends not only provide this market with a place to stay but also provide information on itineraries, transport, attractions and emotional reassurance. In the current economic climate, it is likely we will see this market continue to grow.

To reach this market ahead of the 2012 Games, we need to ensure that our marketing to residents reaches and influences our ethnic minority groups through celebrating the borough's cultural and social diversity. As India is changing there is a danger in relying on the historical link between Britain and India as an incentive for visiting. Indian people are becoming more self-confident in India and the part that India will play globally in the future. Visiting Bollywood film locations is now a growing incentive for travel in the UK. In 2006, 40 Indian productions were filmed in London alone. Film London, the capital's film and media agency already produce a fact sheet for Indian production companies as well as practical advice and on-the-ground support. However there is also an opportunity for the West London Film Office to proactively market West London venues to the Bollywood film industry to increase visitor numbers and to ensure that when friends and relatives come to visit, their tourism expenditure remains within West London. There are also opportunities for Harrow to work directly with Indian film companies through the West London Film Office to offer site visits and familiarisation trips locations in the area. As an example of what has been done elsewhere, to further target Indian visitors, the Yorkshire Tourist Board have created a "Top 10 Indian gems in Yorkshire" to attract visitors from the Indian sub-continent and elsewhere. Harrow's close proximity to Neasden Temple, excellent range of Indian restaurants and strong reputation in Indian dancing are all very positive strengths in attracting this market,

The Olympic brand allows an opportunity to create commonality in our communities and provides an ideal opportunity to create a feeling of civic pride. Inclusive community initiatives such as Under One Sky, the Asian Archive at Harrow Museum and the inclusive programming of the Harrow Arts Centre successfully highlights the diverse culture on offer in Harrow. It is therefore very important that the council's tourism and cultural strategies are very closely linked together to ensure that Harrow makes the most of the opportunities that the Olympic Games represent. These different strands can be brought together through the Council's Championing Harrow strategy, which seeks to make the most of the Olympic opportunities through different work streams including Tourism and Economic Development, Cultural Celebration and Young People, Sports participation and Health.

In addition to the four year Cultural Olympiad, there will also be a strong cultural focus to the main Olympic ceremonies which will include major international festivals: a World Cultural Festival, the International Shakespeare Festival and an International Museums Exhibition. There will also be a UK-wide cultural festival of community cultural projects. The Cultural Olympiad itself will involve theatres and museums; libraries and stately homes; cinema and digital technology and live music, dance and comedy. The new Gayton library facility in Harrow town centre benefits from one of the highest take up rates of library facilities among resident populations and also attracts visitors of other ethnicities who travel to Harrow to use its music library. The facility could therefore provide a central focus for the promotion of events and participatory activities relating to the Cultural Olympiad for both residents and other visitors.

Australia saw a 30% increase in visitor participation in cultural activities after a similar

exercise linked to the Sydney Games. By Involving all of our communities in inclusive Cultural Olympiad activity, we can create a more cohesive feeling of civic pride among the different nationalities who live in the borough and encourage more money to be retained In Harrow during visits from friends and relatives. To mark the launch of the Cultural Olympiad, the Harrow Arts Centre participated In Open Rehearsal which encouraged all our of communities to visit the Arts Centre to participate in the very diverse range of events on offer. Access to culture in Harrow needs to be made more readily available to all our communities and there is a need for marketing and communications campaigns to actively encourage take up in these areas. The Harrow Arts Centre has recently had a great deal of success In targeting the Asian market through diverse arts programming and by employing culturally specific techniques such as offering complimentary food with events. They have also used key influencers within community groups and within community centres to spread the word about targeted events. In March this year the retro Bollywood band night sold out completely and had a waiting list of around 200 people.

In terms of attracting visitors for the Olympic Games, Harrow is proactively targeting selected countries for pre-training camp activity in the two years leading up to 2012. The choice of countries not only reflects the ethnicities who are already settled in the borough but also considers the capacity that the borough is able to accommodate. In addition to the athletes themselves, Harrow would also benefit from the residual spend of their visiting friends and relatives who would also be supporting them during their stay. By creating these links with countries In advance, Harrow can establish Itself as a welcoming place to visit to encourage further repeat business In the future.

Business travel market:

Business tourism accounts for a quarter of all overseas visitors and 31% of inbound tourism earnings. It also has a wider economic impact through associated travel, entertainment, shopping and tours – worth £22 billion a year. The typical business visitor spends nearly £120.00 a day, almost twice as much as the average leisure traveller. Such year-round activity supports 530,000 jobs, many of them full-time, and has made the UK the third most popular destination for international meetings after America and Germany. Whilst this may be an area affected by the global economic downturn, conversely, visiting the UK is now a cheaper option for businesses which may result in more interest.

Harrow currently has a wide range of venues from modern, budget town centre hotel and office meeting rooms to historic and prestigious venues such as the Tithe Barn at Harrow Museum to the world-famous Harrow School. Harrow's strong travel interconnectivity in terms of public transport and motorways is another strong selling point for this market. Venues available in the wider West London sub-region also offer a wealth of famous historic and sporting venues including Chelsea Football Club, BBC, Chiswick House and Wembley Stadium.

The business travel market has already been targeted on a sub-regional basis with West London participating in CONFEX, the leading conference and events exhibition in the industry, which takes place in February each year at Earls Court. 125 leads were obtained from the show and further confirmed business was obtained during post-event familiarisation trips around Wembley Stadium and Harrow. However there is a need for continued promotion in order to be able to compete with other London venues and destinations. In addition to trade events and familiarisation trips, regular e-communications are now being established to keep businesses aware of new products, promotions and raise awareness of Harrow town centre's developing infrastructure. Over the last two years, we have worked hard to build up our contacts within the business travel market and in the present difficult financial climate, there needs to be more of a focus on retaining our repeat business by giving added value wherever possible.

VisitBritain is currently working to maximise business tourism by encouraging conference organisers to come to Britain. EventBritain is a new dedicated events unit to support sporting, cultural and business events organisations. The unit will provide access to specialist support,

linking the Britain brand to business tourism much more than before. It is essential for Britain to maximise the opportunity of hosting the 2012 Games. Our analysis of previous Games in Barcelona, Atlanta and Sydney, shows that business visits and events could accrue up to 50 per cent of the overall tourism economic benefits of hosting the 2012 Games. EventBritain is a key unit in ensuring that this potential is fulfilled and we therefore need to ensure that Harrow gets a slice of the action as part of the wider West London offer.

"Events for London" has been established as a one stop shop for anyone staging an event in the capital. It can help organisers sort out accommodation, transport, security and other needs. The organisation will also develop new events that complement the city's cultural diversity, expand existing events and attract major international festivals and forums. DCMS also supports proposals for a major new International Convention Centre (ICC) in London. A feasibility study for the Mayor advised that the new ICC could generate an extra £400 million for the capital with at least 5,500 extra jobs.

Group Travel Market

The group travel market is another area of significant growth into the future and Harrow benefits from having some heritage interest which will be augmented in the next two years by the addition of the Heath Robinson collection in West House, Pinner and also the historical aspects of RAF Bentley Priory. These two additional attractions provide enough product to create group travel itineraries around the borough. Themed itineraries provide the most interest to special interest groups and the themes of architecture/ heritage and British history could be applied to many Harrow venues including Harrow School, Headstone Manor, Grim's Dyke Hotel, West House and Bentley Priory. Harrow School already attracts 8-10,000 visitors a year from the group travel market mainly from "probus" groups who mainly consist of Women's Guild, National Trust groups etc.

Group sizes are declining and tend to be around 20-30 people rather than 50-100 people. Coaches are more environmentally friendly than cars since they achieve the economic benefit of transporting more people at the same time and have the benefit of being managed (fixed drop off and pick up points and designated parking areas). The majority of Harrow hotels have free parking areas, which are unobtrusive and would not adversely affect the local residents. Group travel itineraries further spread visitors more widely across the borough with potential new trade not only for the attractions but also for the restaurants, cafes and shops situated in the near vicinity.

The legacy following the 2012 Games also presents an opportunity to offer a different tour itinerary to our 2012 games supporters who may wish to return to see another side of the capital in the aftermath of the Games. Having experienced all that east London has to offer, there is also considerable scope to develop "West London" itineraries to encourage Olympic visitors to return and discover another side to the city.

This method of using the Games as a catalyst to expand interest and curiosity for other parts of the host nation was used to great effect by the Sydney Olympics when their tourism industry continued to benefit from the Games for years after by offering different itineraries across the country. It would also be in Harrow's benefit to link in with other similar attractions in the local area such as Syon House etc or with a similar product theme such as Harrow on the Hill, Highgate and/or Hampstead. In contrast to central London, Harrow's venues offer free car parking facilities and no congestion charge zone. Itineraries could also be used for school visits etc

Skills and Training

The Hospitality, Leisure, Tourism and Travel (HLTT) industry in London supports 280,000 jobs. The restaurant industry is the largest in terms of employment, followed by pubs, bars, nightclubs and hotels. It is a major growth sector, with 27% growth in employment during 1995-2000, which exceeds the London average of 17.7%. Currently there are also quite considerable staff

shortages - chefs and waiting staff are the most predominate “hard to fill” vacancies with 70 and 68% of vacancies unfilled, respectively. In addition, the hospitality industry experiences difficulties recruiting housekeepers (57% unfilled), hotel porters (55% unfilled) and catering assistants (61%).

A relatively low proportion of employment in tourism and leisure is taken by “in-commuters” and 89% of workers employed in the sector in London are Londoners. Hospitality could therefore help provide the means with which to ensure that local people in Harrow have access to local jobs. Hospitality jobs also provide a greater degree of flexibility to enable groups such as single parents and carers to work during periods that are best suited to their needs.

These shortages are further compounded by the very high turnover of the industry generally. The difficulties in staff retention are affected to some degree by perceptions of the industry being low-skilled and low-paid. However according to recent research, it is predicted that by 2014, there will be a decrease of 19,000 in the number of those working in “elementary occupations” and an increase of 41,000 in the number of managers. There therefore needs to be greater awareness of the variety of jobs and the career progression that can be achieved in the industry.

The UK Skills Passport is a new and unique online resource that has been developed to provide comprehensive information and tools on skills development, training, jobs, qualifications and access to funding in the tourism and hospitality industries. This is intended to make it easier for employers to recruit and retain good staff and help employees to take control of their learning. The site also contains a very useful mind map outlining the possible career progression for students entering the industry.

The Council’s Economic Development Team are currently working on new approaches to tackling worklessness such as “Slivers of Time” which was originally funded by the Office of the Deputy Prime Minister (ODPM). The scheme works by matching potential employees from the local area to organisations who are urgently seeking people to carry out short hourly contracts for 1-3 days. The flexibility of the scheme is particularly well suited to hotel, leisure and entertainment facilities who frequently need employees at short notice at varied times during the day and evening. This approach would help to meet the targets of the West London City Strategy Pathfinder, which aims to reach a target of 80% of working age people in employment. Hotels and leisure attractions are also being consulted on the Council’s Xcite project, which aims to target specific areas of deprivation in the borough to reduce rates of worklessness by providing one to one coaching and access to local work.

Customer service issues

Recent research conducted by Visit Britain indicates that overseas visitors’ perceptions and experiences of customer service in Britain are poor. A further 57% of visitor economy businesses believe that the customer service skills of their employees could be improved. It is for this reason that the London Development Agency with support from the Learning & Skills Council and People 1st, are compiling a “Gold standard customer service for 2012 and beyond” Plan to improve existing levels of customer service.

Consultation with hotels in Harrow has also indicated that some of the current tourism and travel courses do not sufficiently equip today’s students with the practical skills they need in today’s industry. Some progress to this end has been achieved over the past two years by People First and the industry in identifying skills priorities and working with stakeholders on developing long-term solutions. In 2007, the DCMS and People 1st launched the employer led “Raising the Bar”: the national skills strategy for hospitality, leisure, travel and tourism sectors in England. Raising the bar outlines a ten point plan focussing on management and leadership, chefs and customer service and on improving staff retention in the industry. It is important to ensure that these findings are put to practical use in today’s training courses in colleges.

Personal Best:

Funded by the London Development Agency (LDA) and Learning and Skills Council (LSC), the Personal Best programme will help participants find jobs and training opportunities. Graduates of the scheme will also be offered an interview to be a volunteer during the London 2012 Games. Harrow College is already implementing the Personal Best training scheme in the area of events organising for local people. There is great potential to use these new labour skills either within volunteering opportunities but also as part of the Cultural Olympiad and tourism activity over the coming years.

London Ambassadors Scheme:

The welcome a visitor receives at a destination is key to the tourism experience. Visitors and participants also cite the visitor welcome as one of the main measures of success for Olympic and Paralympic Games. With this in mind the LDA has invested in a scheme that provides new skills to existing customer-facing staff, helping them to move from local experts to London Ambassadors.

The underlying principle is that free, impartial and reliable information goes a long way to creating a sense of comfort and confidence among visitors when they are in unfamiliar surroundings, and therefore enhances the sense of welcome. The first recipients of the training have been neighbourhood wardens who currently provide a uniformed presence in parts of the capital, offering an additional level of information and security for visitors exploring London. In the first year over 200 wardens have been through the programme from warden schemes in the boroughs of Camden, Greenwich, Hammersmith & Fulham, Islington, Merton, Newham, Southwark, Waltham Forest, and Westminster City Council. The scheme is now being rolled out to other staff at key visitor contact points such as Heathrow Terminal 5 and TfL Travel Centres.

It is the LDA's intention to role out this scheme to the outer London boroughs later on this year. Bearing in mind Harrow's ethnic diversity, it would also be advantageous to make use of the borough's language skills through voluntary work placements for new arrivals or other ethnic minority groups who are struggling to gain permanent employment. This would increase the skills of the local workforce providing customer service experience which could later be put to use in a hospitality setting.

The role of volunteering

The 2012 Games provide a major catalyst to increasing levels of current volunteering across the UK. 70,000 volunteers will be needed in total and the volunteer programme has already become massively oversubscribed. The criteria for choosing volunteers will to a large extent be based upon experience of volunteering at a local level. This provides a great opportunity for local authorities to capitalise on the interest and enthusiasm for volunteering which the 2012 Games will generate.

Local level volunteering would also create an opportunity to increase local pride in Harrow by encouraging locals to take an active part in improving and promoting their local area. This could include conservation work at attractions in the borough such as the lake at Grim's Dyke Hotel or creating a range of regular guided walks to incorporate the Harrow Heritage Trails. Volunteering is now one of the Council's Local Area Agreement (LAA) targets and as such, new innovations such as the one-4-one scheme where council employees are released for one hour's volunteering a week, will help to encourage local volunteering opportunities for staff.

The growth in interest in employer supported volunteering is characteristic of a much larger movement to encourage employers - business and the public sector to become more socially aware and accountable. Employers are increasingly realising that they have responsibilities on many levels, and everything from employment records and human rights to environmental issues is under scrutiny – not just from pressure groups, but from shareholders, customers, and potential investors and business partners. The idea of integrating these issues with business operations and strategy is called Corporate Social Responsibility (CSR). A joint-working

partnership approach between Harrow Association of Voluntary Services (HAVS), Harrow council and the local businesses could ensure an integrated approach to creating volunteering opportunities in the tourism sector.

Quality Improvement

Accommodation

Quality of accommodation is the single biggest complaint from visitors who spend time in Britain. Currently, only 34% of accommodation in the capital is quality assessed. Research has demonstrated that visitors do not return to a destination if the accommodation did not meet with their expectations. In London this is particularly problematic when bearing in mind that accommodation is very expensive when compared with other similar city break destinations abroad. In order to therefore raise standards and protect repeat visits that the 2012 Games hopes to generate, the LDA has launched a £1.6 million incentive package to increase the proportion of quality accreditation to 50% by 2010.

The scheme, which was rolled out in 2007, offers non-assessed properties a £400.00 reduction over a three-year period in the costs of becoming assessed. This is of particular benefit to B&B operators who find the costs of the scheme prohibitive. In more recent months, the effects of the credit crunch have been felt particularly in the guest house accommodation sector with several properties in Harrow reporting a noticeable decrease in trade. As the battle for trade becomes more competitive, this provides a timely opportunity to highlight the benefits of increased publicity and business advice which quality assessment would give to struggling businesses in this sector. In the run up to 2012 it is also important to maintain this momentum and ensure that the new businesses are also informed from the start of the importance of being quality assessed.

The Government is also seeking to make visitors more aware of the benefits of booking assessed accommodation by employing consumer marketing techniques in the press and through Visit London. By increasing public awareness in this area, it is hoped that quality-assessment will become a recognisable benchmark of quality for the public in the same way that ABTA bonding has in the package holiday market. There are also plans to incorporate a number of well-known customer feedback sites such as tripadvisor as a means of improving accommodation and facilities. Following a consultation between DCMS and Visit Britain, it has been agreed that the England Net internet portal should contain a facility for electronic feedback. This would be designed to provide reliable, mediated feedback. Such a scheme, would also provide an opportunity to promote it through the www.visitharrow.co.uk website.

Visitor Attractions

Over the course of the next two years Harrow's range of attractions will grow to include Bentley Priory and also West House in Pinner Memorial Park. However these facilities will not come forward until the whole site is developed and may take longer in the current economic crisis.

In order to ensure that all our attractions are fit for purpose, it is highly recommended that they also become accredited. The Visitor Attraction Quality Assurance (VAQAS), was launched nationally in 2001. It is a customer focussed quality assessment service for all types of attractions. It helps to identify the strengths of an attraction and highlights development areas based on industry examples. A wide range of attractions of all sizes, both large and small, throughout England have benefited from this service.

It is estimated that 4,500 disabled athletes and a large number of disabled visitors will come to the Paralympic Games. Many will want to attend other events and attractions. It is important that they find them accessible. The Olympic Village and stadia will be fully accessible, as will London buses, black cabs and the Docklands Light Railway from 2008.

Pedestrian Signage

Signage for both pedestrians and road users are a common source of frustration for venues and visitors. A recent study showed that there are 32 different types of signage for walkers in central London alone and that 44 per cent of pedestrians use the tube map to help them navigate.

Transport for London (TfL) is working with the LDA tourism team on the Legible London project, to help encourage more journeys by foot and improve pedestrians' quality of experience. Its long term aim is the design, development and roll-out of a consistent and simple pedestrian wayfinding system, initially in the congestion charge zone, and subsequently across the whole capital. By 2025, all London boroughs must comply with the new signage system.

It is imperative that good co-ordinated pedestrian signage exists from Harrow on the Hill train station to the new Gayton Road TIC facility. Following consultation, it has also been made apparent that clear signage from the train station also needs to be able to direct the visitor to the village of Harrow on the Hill.

Much confusion also surrounds the place name of Harrow on the Hill as many visitors confuse the village with the town centre as "Harrow on the Hill" is the name used on the tube map to the town centre. While changing the actual place name may prove difficult to implement, clear signage must direct the visitor to both destinations.

Signage for road users

Since the implementation of the previous tourism strategy, Harrow now has six new white-on-brown signs implemented for the Grim's Dyke Hotel, one replacement sign for Harrow Museum and one new sign for Harrow Museum implemented at the top of Harrow View. More progress needs to be made with signing other attractions in the borough and also incorporating new attractions such as RAF Bentley Priory and West House in the years leading up to 2012 in order that a co-ordinated system of signage is created.

The [LDA's guidance](#) on white-on-brown tourism signs in London was published in June 2007. The original project, based on stakeholder consultation and research, looked at how effective these road signs are in informing visitors and how they could be used more efficiently by visitor attractions, businesses and local authority transport and tourism officers.

Harrow town centre hotels have also expressed an interest in road signage. According to regulations outlined by Transport for London (TfL), due to the high proportion of hotels that already exist in London, it is not possible to provide signage for individual hotels. However, it has been noted that particularly at weekends, leisure visitors contribute to congestion particularly around Northwick Park roundabout due to problems finding hotels – this is most notably the case with the Comfort Hotel Harrow. Current legislation does not allow for hotels in London to be signposted but there is a definite need to simplify the visitor's experience of reaching their destination. An alternative solution might be to introduce 3D navigational instructions on the Visit Harrow website or liaise with Satellite Navigation companies to enable visitors to find their way more easily to the hotel.

Product Development

Hotel Development

The Mayor's Tourism Vision for London 2006-2016, has recognised that there is great demand on London's existing accommodation stock. A total of 40,000 extra hotel rooms will be required between 2007 and 2026. The geographical spread of hotels is also expected to increase with a large number of developments planned for East and West London. Hotel developers have strict criteria when making a decision on a site and the key trends in the spread of accommodation across the city are linked to such factors as regeneration initiatives, proximity to strong leisure drivers and good transport links.

Harrow's good transport access and close proximity to Wembley Stadium, make it a strong contender for further hotel development in the future. Already two new hotel applications have been received in 2008. This is an opportunity for closer working partnerships between boroughs and developers to provide intelligence and ensure that both parties needs are met. While hotel development on disused brown field sites is a beneficial use of existing resources there is also a need to protect our environment as outlined in the Local Development Framework (LDF). The Good Practice Guide on Planning for Tourism published by the Department for Communities and Local Government provides good guidance on this.

Hotel occupancy in Harrow has shown a sharp increase in demand between 2005 and 2008. There have also been several instances of hotels in Harrow reaching the unprecedented figures of 115% occupancy in 2007. While much of this traffic can be attributed to the re-opening of Wembley Stadium, Harrow is also proving a popular overnight stay destination for many other pan-London events. . Harrow's good transport links to the east of the city via the Metropolitan and Jubilee lines will also put the borough on a good standing for an overnight stay destination for visitors attending the 2012 games and this ease of travel must be one of our key messages to our target audiences.

Town centre developments

Whilst Harrow has one of the lowest levels of crime, the implementation of a town centre Police team has already had a very positive impact on the look and feel of the town centre and has also helped to reduce the fear of crime, making the town centre a more welcoming place. Harrow Council is also showing strong leadership by implementing sustainable measures for the future of the town centre, which include a Business Improvement District (BID) and a Town Centre Supplementary Planning Document (SPD). The Council is also supporting the development of major projects such as a new Harrow College, which will result in greater footfall and spending within the town centre. The Business Improvement District would allow town centre businesses to manage the town centre and allocate extra resources to improve its vitality and future prosperity. The BID levy would charge businesses a 1% increase according to their rateable value to create a collective annual fund worth in the region of £250,000.

The additional funds raised in the BID levy would be used to tackle crime and anti-social behaviour, and to market and promote the town centre to residents, employees, shoppers and visitors. The marketing and promotion would include the delivery of a well-publicised and well-organised calendar of town centre events including international markets to raise the profile of Harrow and encourage greater footfall from more affluent areas of the borough. Recent research has also indicated that regular street markets have a very positive effect on shop vacancy rates in the surrounding area. The BID would also seek to encourage an evening economy in Harrow town centre with later shop opening hours and possible restaurant and leisure promotions. According to the Harrow town centre strategy, currently 40% of residents do not view Harrow town centre as their main shopping area.

It will remain important to target resources on the visitors that we are already receiving due to events at Wembley Stadium, the O2 and other London venues, to create partnership activity with the retailers and other leisure facilities. Pre-departure information to potential visitors could include notice of town centre events, shopping promotions and late evening shopping opportunities to increase trade for the town centre and help add a greater feeling of vitality to the area. This form of promotion could also be extended to other attractions and events in differing areas of the borough in order to ensure that the benefits are spread equitably around the whole borough.

Sustainable transport

Sustainable transport is defined as any public use of transport; trains, buses, car sharing, walking and cycling, all of which are considered to be less damaging to the environment and which contribute less to traffic congestion than one-person car journeys. Sustainable transport schemes can help reduce pressure from on-site traffic and save on the cost of providing

parking, while protecting sites from the visual and noise pollution and physical damage of extending car parks. An attractive well-connected and well-promoted network of walking, cycling and public transport routes is an invitation to explore the environment and a valuable asset for any tourism destination.

As Harrow's heritage attractions are geographically spread around the borough, there is a need to improve the public transport infrastructure around these sites. The Mayor's Transport strategy aims to increase the bus network capacity by 40% over the coming years, which will be of particular benefit to Harrow. Higher service frequencies, better reliability and increased capacity on London underground will also benefit Harrow which is home to twelve different stations on three different tube lines.

As front-line ambassadors for the borough, there is also a need to improve our bus drivers' knowledge of the key tourism sites. During the course of the first strategy, bus drivers were invited to attend Harrow familiarisation trips to enhance their knowledge of the local area but unfortunately the transport contractors were unwilling to release their staff for such product training. Further lobbying of the bus companies needs to happen at sub-regional and national level to ensure that the service meets the needs of increasing numbers of visitors who may be entirely unfamiliar with the area.

A good example of sustainable transport in tourism can be found at Prior Park Landscape Garden in Bath, the National Trust worked in partnership with the local bus operators to establish a bus stop outside the main entrance and there is now a service every twenty minutes throughout the year linking the city with the garden. Forming partnerships with other local attractions also allowed joint ticketing arrangements, which include the bus service. The property was also marketed as an environmentally sustainable attraction - one aspect of which is the green transport options available. The main leaflet for the site is designed to explain how to arrive without driving, and that, wherever you are, you can reach the gardens by bus or on foot.

There is also a need to enhance, increase and improve the existing walking and cycling networks currently available in Harrow. During "resident week" activities, the Harrow Heritage Trails have been of particular interest to residents with the highest take up of all the activities on offer. In response to the demand generated for this type of activity, there is scope to encompass the Harrow Heritage Trails into the existing volunteer walk leader programmes that are currently rolled out by the Harrow Primary Care Trust. Volunteering could be used in this way to provide regular guided walks of the local area, increase health benefits, improve residents' knowledge of local attractions and help to instil a higher level of civic pride in all our residents. There is also great scope to encourage more local tourism by encouraging residents to visit and support the heritage attractions and expansive greenbelt area that Harrow offers. The attractions offer a fantastic insight into Harrow's past with many tours provided free of charge or for only a nominal fee, as is the case for Harrow Museum.

Harrow is also known for its fantastic range of restaurants. The Grim's Dyke Hotel and Incanto both have AA rosettes and Friends restaurant in Pinner is Michelin rated. At the other end of the spectrum, MASA in Wealdstone was runner up in the Time Out Cheap Eats Awards 2006, and Curry Mahal won Best restaurant in Greater London in the British Curry Awards 2005. Sea Pebbles restaurant in Hatch End has also won the Observer, Evening Standard and Sea Fish industry awards. Restaurants are one of Harrow's real strengths and represent an important sector of Harrow's evening economy and more therefore needs to be done to promote them to local audiences particularly during recession

The Government guidance on local transport planning recognises that, more than any other area of policy, transport needs to be joined up with the wider planning and policy framework. In the National Policy context, "the future of transport – a network for 2030",

The following objectives would have particular relevance to tourism. “Enabling people to make informed choices and how and when they travel and providing bus services that are reliable, flexible, convenient and tailored to local needs.” By providing greater flexibility, tourism could for the first time be factored in the criteria for future investment in transport planning.

New attractions

Harrow’s heritage offer will be significantly enhanced in the following years by the addition of both RAF Bentley Priory and West House in Pinner Memorial Park. Bentley Priory is a mixed use site which means that its status as a visitor attraction will be limited to set opening days and times during the year. However its historical areas including the Sir Hugh Dowding Room are of considerable interest to the public at large and the site therefore represents a major draw for local residents/ Londoners and for specialist group travel operators. The prestigious and historic nature of the site would also provide an excellent venue for corporate meetings, conferences and events for the high yield business travel sector.

West House will be converted into a museum to display the William Heath Robinson Trust Collection. In addition, the restored house will also contain an art gallery to international standards, community education and function rooms, a space for historical archives including the Pinner Books of Remembrance, a café and a museum shop. The interest in the collection was demonstrated in 2005 when a touring temporary exhibition in the UK recorded the highest visitor numbers for any free exhibition in the UK. In addition to domestic interest, Heath Robinson also has a great following in Japan and therefore provides a greater draw by the more lucrative overseas visitor markets. The creation of these two new sites could also encourage greater trade for the surrounding town centre areas of Stanmore and Pinner, where restaurants, shops and cafes could benefit from the increased trade visiting these attractions. Best practice in visitor management policies are important in the development of both these sites to ensure the respect of the historic aspects of the site, enhance the visual quality of the site and ensure that the development fits in well with its surroundings.

Monitoring and Evaluation 2009-2012

The council will evaluate the success of this tourism strategy by measuring the following areas:

Increase in overseas visitor spending by 20% from £81 million to £96 million	
Increase in the number of accommodation bed spaces by 10%	
Increase visitor spend by 10% from £161 million to £177 million	
Increase the number of quality assessed accommodation from 42% to 60%	
Establish quality management systems - to include customer satisfaction measures. (A target of 70% good to excellent satisfaction measurements.)	
Increase number of jobs generated by tourism in the borough by 5%	
The strategy will also contribute to the below national indicators and Enterprising Harrow	

indicator framework: NI15: general satisfaction with local area NI16: Participation in regular volunteering	
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Conclusion

The council has an important role to play in the development of the visitor economy in Harrow. Tourism's re-positioning within the Planning, Development and Enterprise directorate reflects the important emphasis placed on tourism as part of the wider economic development remit. The promotion, management and development of tourism in the borough will not only enhance the visitor experience but will also improve the quality of life of our residents who will benefit from upgraded facilities such as heritage attractions, parks and open spaces and other tourism sites.

Strong partnership activity and cross council support is vital to the success of tourism development in Harrow to bring consistency and support to the sector. As the provider of essential public facilities, statutory policy and infrastructure such as Planning, Conservation, Environmental Protection, Licensing and Parking, the council's role has a major impact on tourism development. By taking pride in the fact that Harrow is a destination worth visiting, tourism can also have a positive effect on bringing together our ethnically diverse communities who all have an important role to play in encouraging their friends and relatives to come and stay in Harrow in the lead up to, during and after the 2012 Olympics. The council and its partners will therefore ensure that all sections of the community are able to benefit and that quality of life is improved through the advocacy of tourism.