

<b>Committee(s)</b>	<b>Dated:</b>
Culture, Heritage and Libraries Committee	23 November 2020
<b>Subject:</b> Covid-19 Supplement to the City's Visitor Destination Strategy	<b>Public</b>
Which outcomes in the City Corporation's Corporate Plan does this proposal aim to impact directly?	3, 4, 5, 7, 8, 9, 10 and 12
Does this proposal require extra revenue and/or capital spending?	No
If so, how much?	N/A
What is the source of Funding?	N/A
Has this Funding Source been agreed with the Chamberlain's Department?	N/A
<b>Report of:</b> Director of Major Projects	<b>For Information</b>
<b>Report author:</b> Nick Bodger, Cultural and Visitor Development Director	

### Summary

The City's Visitor Destination Strategy 2019/23 (*Discover the City*) was adopted by Court of Common Council on 23 May 2019. Since then, the Covid-19 pandemic has hit the City's tourism and hospitality sectors hard and recovery is proving challenging; indeed, the Mayor London, Sadiq Khan, emphasised the crisis faced by the sector in a press release on 23 October 2020 saying "spending by tourists in central London is set to plummet by £10.9 billion this year as a result of the Covid-19 pandemic – far more than the amount lost from fewer commuters traveling into the city".

In figures, City attractions were 87% down year-on-year for the month of September; over the last quarter (July through September) when most attractions have been open, this figure drops to 90%. The recent escalation of Tier 2 restrictions for London is likely to impact numbers further.

Many shops, cafes and restaurants that have opened during recent months have since shut, as operations have become financially unviable. This is largely due to the City's geographical position within the Central Activities Zone, a lack of local residential communities to patronise attractions and amenities, and the absence of the City's workforce, as well as the sharp drop in visitors from overseas to London.

This report contains a Covid-19 supplement to the City's Visitor Destination Strategy which seeks to reprioritise areas of activity in the strategy and provides a roadmap that will inform the work of your Cultural and Visitor Development Team over the coming months. The supplement is a summary of the work undertaken by Carmel Dennis Tourism Consulting, Scattered Clouds and RJS Associates in consultation with City tourism stakeholders. This work was presented to your Committee in July by Carmel Dennis. The supplement will be published on the City Corporation's website following this meeting.

## Recommendation(s)

Members are asked to:

- Note the report and the contents of the Covid-19 supplement to the City's Visitor Destination Strategy 2019/23 (*Discover the City*), the contents of which were presented to your Committee on 13 July 2020.

## Main Report

### Background

1. The City's visitor economy and the infrastructure across retail, hospitality and other sectors that support it, is struggling. While some of its attractions are tracking footfall rates slightly above the national average, many are not, with some still closed because social distancing mitigations cannot be realised.
2. In figures, City attractions were 87% down year-on-year for the month of September; over the last quarter (July through September) when most attractions have been open, this figure drops to 90%. The recent escalation of Tier 2 restrictions for London is likely to impact numbers further.
3. Many shops, cafes and restaurants that have opened during recent months have since shut, as operations have become financially unviable. This is starkly apparent around the tourist hotspot of St Paul's Cathedral (and Paternoster Square) where many supermarkets, bars and cafes have closed, some permanently. This is largely due to the City's geographical position within the Central Activities Zone (CAZ), a lack of local residential communities to patronise attractions and amenities, and the absence of the City's workforce as well as the sharp drop in visitors from overseas to London.
4. Compared to other areas, be they the outer London boroughs where residential communities may still support local businesses, or the West End, within the CAZ, which has a far stronger retail offer to drive audiences (albeit this is significantly diminished), the City's streets are empty. Even with significant and strategic intervention, the City will likely see more and more closures across tourism, retail and hospitality sector businesses over the next year, reducing its attraction as a place to be, for visitors, workers and residents and impacting on its ability to recover with any speed as markets return to London.
5. Indeed, the Mayor of London, Sadiq Khan, emphasised the crisis faced by the sector in a press release on 23 October 2020:

“Spending by tourists in central London is set to plummet by £10.9 billion this year as a result of the Covid-19 pandemic – far more than the amount lost from fewer commuters traveling into the city”.
6. In April 2020, your Cultural and Visitor Development Team commissioned Scattered Clouds to undertake research and scenario planning for the City's tourism sector in light of the pandemic and the impacts this has, and is likely to have, on the sector. This work informed a subsequent, detailed commission from Carmel Dennis Tourism Consulting and RJS Associates which, working in close consultation with City tourism stakeholders to understand needs, sought to examine the priorities listed in the City's Visitor Destination Strategy 2019/23 ([Discover the City](#) – available via the link provided) and refocus the work of your

Cultural and Visitor Development Team, enabling them to address the challenges faced by City tourism businesses in the most efficient and effective way.

7. Carmel Dennis presented this work to your Committee in July and the proposals noted. The detailed recovery plan has subsequently been condensed into a short supplement summarising key findings and providing a clear focus for work that will – it is hoped – significantly benefit the City’s tourism sector as recovery progresses. The full research and recovery reports are available on request from the Director of Major Projects. The supplement, which appears in appendix 1, will be published on the City Corporation’s website following this meeting.

## **Current Position**

8. Your Cultural and Visitor Development Team (CVDT) has been working hard to achieve the priorities outlined in the supplement. This body of work is too large to describe within this report but includes headlines as detailed in the following items.
9. The team has surveyed visitors at City attractions to understand demography, motivations and experience ratings amongst other factors. The full report is available on request from the Director of Major Projects and has been shared with tourism stakeholders in the City. Key findings include:

### **a. Visitor Characteristics**

- i. In the post lockdown period day visitors from home dominated but not exclusively so – approximately a quarter of visitors were on a trip staying away from home. This latter group comprised both UK and overseas visitors;
- ii. Allied to this, Londoners were the primary audience (58% of visitors);
- iii. Nearly two thirds of respondents had not visited the attraction before;
- iv. The most common age of respondents was under 35 years.

### **b. Trip Characteristics**

- i. Underground and overground trains were the main forms of transport used – but walking was also common;
- ii. An attraction’s own website/social media was the most common influencer for visitors, followed by word of mouth;
- iii. ‘To experience something different’ and visiting ‘a must-see site’ were the primary reasons to visit attractions;
- iv. Half of respondents planned to eat out or go for a drink as part of their trip; other common activities were to go for a walk and / or sightseeing;
- v. Half of respondents planned to visit other attractions in the next four weeks.

### **a. Experience**

- i. Value for money and overall enjoyment ratings with the attractions were high, and visitors were very likely to recommend after their visit;
- ii. Coronavirus measures at the attractions were rated as excellent;
- iii. Respondents felt overwhelmingly comfortable with the numbers of visitors across all attractions surveyed;

- iv. Reactions to coronavirus measures on the decision to visit were mixed – 46% highlighted they would have visited anyway while 34% would have not visited if measures had not been in place.
10. A series of industry focussed webinars have been hosted for City (and London) attractions. These have included your Cultural and Visitor Development Director in conversation with Bernard Donoghue, Director of the Association of Leading Visitor Attractions and Baroness Deborah Bull, Chair of the Arts and Strategy Group (through London Culture Forum) and presentations by the likes of Carmel Dennis (on the findings of the recovery plan consultation) amongst other topics and experts of interest to stakeholders. A roundtable with the City's hotels, bars and restaurants to discuss opportunities around outside dining is planned for later this month, with ongoing sessions with external visitor attractions on intelligence sharing, changing legislation and operating guidance.
  11. Your CVDT also continues to work hard to achieve exposure for City content in London and national campaigns. To date, coverage has been achieved (or is promised) within *Because I'm a Londoner* (L&P, targeting local London audiences) and *England Originals*, a consortium of which the City is a member and through which a collective bid to the Discover England Fund has delivered £158,000 for the retargeting of its 2019 US-focussed campaign promoting England's "heritage cities" to one that attracts domestic audiences.
  12. Work is also ongoing with *Escape the Everyday* (a Visit Britain campaign, targeting national domestic audiences). This builds on the notion that there is no better time to visit central London. With attractions and shops being quiet, the experience for the would-be visitor is one that enables a deeper, unfettered and more enjoyable experience, which – without the crowds – in turn supports messaging around safety and social distancing. The success of a recent street photography workshop commissioned by the CVDT which received 52,000 views on You Tube, provides the driver for the campaign which promotes coming to the City and photographing it (and its attractions) without people present.
  13. The Team have also negotiated a partnership with the City Guides, Transport for London (TfL) and neighbouring boroughs to launch an initiative that delivers Guide-led walks from the City's seven neighbouring boroughs (one per day) into and out of the City. The walks provide a safe alternative to public transport and have run from mid-August to end October. In addition, a map of safe walking routes in City has been developed by TfL and will be hosted on their website with the guide-led walks developed into curated walking maps (PDFs) and promoted through TfL's social media. All walks are promoted within neighbouring boroughs to local communities within a walkable distance of the City. Walking routes and alternative means of travel around, into and out of the City from major transport hubs at London Bridge, Waterloo, Victoria and King's Cross have also been researched; these are promoted on a welcome page for visitors on the [City's corporate website](#) (see link).
  14. The team has also started work on the family focus phase of the supplement (phase 2) with a reworking of its City Visitor Trail Children's Map, which contains stickers, games and activities. The new trail can be started and finished anywhere in the City (previously this was from the City Information Centre only). The walk is promoted through City hotels with a major campaign across schools and parent-led social and printed media beginning this month.

## Corporate & Strategic Implications

15. **Strategic implications** include alignment with the [Corporate Plan](#) at outcomes 3, 4, 5, 7, 8, 9, 10 and 12 in that the supplement helps to provide access to tourism facilities by driving footfall at a time of greatest need; that it seeks to preserve and promote the City's tourism businesses so retaining the City's attraction as a compelling destination; that it seeks to champion alternative routes into the City especially through walking and cycling; and that it promotes City heritage assets cultural experiences and events.
16. **Risk implications** include the potential for London to move to a higher risk level (tier 3). Should this happen, some activities may need to be suspended and priorities reassessed in the short term.

## Conclusion

17. The City's visitor economy is struggling with the amenities that support it across retail and hospitality particularly affected. A reprioritisation of ambitions within the City's Visitor Strategy is vital to ensuring your Cultural and Visitor Development Team and all departments working within the tourism context, focus on the activities that will bring the greatest benefits within the resource envelope available.
18. It is not anticipated that pre-Covid footfall and spend levels will be reached again in London until at least 2024. Identifying alternative markets to deliver revenues is also therefore vital if the City's visitor offer is to be preserved and a successful recovery achieved.
19. The publication of the supplement aligns with many key strategy outcomes for the City Corporation, not least the aspiration within the recent [London Recharged](#) report which seeks to deliver a 50% rise in visitors at weekends and in the evening by 2025.

## Appendices

- Appendix 1: City Visitor Destination Strategy 2019/23 Covid19 Supplement

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