

# **Discover the City**

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

**Draft**

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# **RJS**

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## Foreword

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

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

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

This is the City of London Corporation’s fourth Visitor Strategy, its first was produced in 2007 and its most recent in 2013. Since that last strategy, huge progress has been made in delivering its vision – to significantly develop our visitor economy and, in so doing, enhance London’s attractiveness as place to visit and do business. In 2017, the City recorded increases against the strategy’s baselines of 19% in visits to its various attractions, 107% in visitors overall<sup>1</sup>, and 109% in visitor spend. Today, the sector is estimated to support over 18,000 jobs in the City.

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

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

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

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

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

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

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## 1 Introduction

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

The City of London *is* London.

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

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

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

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

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

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

## 2 The Strategic Context

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

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

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

### 2.1 Policy Framework

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

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

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



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

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

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

## 2.2 The global tourism economy

Travel and tourism is one of the world's largest economic sectors, accounting for 10.4% of global GDP and 313 million jobs, or 9.9% of total employment in 2017.<sup>2</sup>

London is the gateway to England, and the UK. In 2016, London alone attracted over 30m overnight visits - of which over 19.1m were international. London accounts for half of England's international visitors and its visitors generate nearly £30 billion of spend a year. The sector employs 700,000 people - one in seven of the capital's jobs - and accounts for 11.6% of London's GDP<sup>3</sup>. Visitor numbers to London are expected to grow to 40.4m by 2025.

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<sup>2</sup> Travel & Tourism Economic Impact 2018 (World Travel and Tourism Council 2018)

<sup>3</sup> A Tourism Vision for London (London and Partners 2017)

### 2.3 Tourism in the City of London in 2017

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

#### THE BELOW IS TO BECOME A SERIES OF INFOGRAPHICS

- 18.4m visits
- £1.76billion spend
- Supports over 18,000 jobs
- 70% of spend is from London and UK residents / 30% from overseas
- More than half of spend (53%) is from business visitors, the rest from leisure visits<sup>4</sup>
- 6.6m visits to City attractions (+26% since 2010<sup>5</sup>)
- 383,000 visits to the City Information Centre
- 6,200 hotel/aparthotel bedrooms<sup>6</sup> (circa 40% increase since 2011)

### 2.4 Tourism Futures

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

- London’s visitor numbers are expected to grow to 40.4 million by 2025, with increases across all markets; the strongest growth is anticipated to come from Asia (particularly China).<sup>7</sup>
- Technology will continue to transform the visitor experience. Smart phones have become essential tools, used for researching and booking, as well as for wayfinding and sharing photos via social media. Having timely, accurate and lively online destination content will be crucial. Push-technology has become super-smart, with algorithms facilitating the targeting of specific audiences with specific messages that meet their profile, interests and location<sup>8</sup>

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<sup>4</sup> City of London Facts of Tourism 2017 (RJS Associates Ltd – 2018)

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

<sup>6</sup> City of London Facts of Tourism 2017 (RJS Associates Ltd 2018).

<sup>7</sup> A Tourism Vision for London (London and Partners 2017)

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

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

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



## 3 The Opportunities and Challenges

### 3.1 Opportunities

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

### 3.2 Challenges

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

<p><b>Increased competition</b></p>	<p>Other areas and boroughs of London – such as Greenwich and the Queen Elizabeth Olympic Park – have plans for major infrastructure and cultural developments in the coming years.</p> <p>Globally, other world cities are developing facilities and targeting visitors as well as business investors, particularly Frankfurt, Dubai, Singapore and Beijing.</p> <p>The City needs to ensure it works hard to maintain its market share.</p>
<p><b>Perception issues</b></p>	<p>London can be perceived as expensive and crowded, especially among domestic audiences<sup>10</sup>; despite recent leaps forward, the City is known for business significantly more than for its heritage and cultural offer.</p>
<p><b>Wider challenges</b></p>	<p><u>A sustainable workforce</u>: across London the visitor sector is estimated to employ 700,000 people. It is estimated that 21,000-63,000 recruits are needed each year to maintain current levels. This could be a significant challenge post-Brexit.</p> <p><u>Terrorism and security</u>: central London and the City remain sensitive to terrorism and security-related incidents. These can lead to major drops in visitor numbers and impact negatively on perceptions. Overseas markets, families and school groups are particularly susceptible.</p> <p><u>Visas</u>: India and China are forecast to be major growth markets for international travel but the costs of obtaining visas is a major concern for London’s tourism sector. Post-Brexit, tighter visa regulations could negatively influence visitor numbers to the UK from European markets for both leisure and business.<sup>11</sup></p> <p><u>Air capacity</u>: London’s runways and airports have sufficient capacity to support the growth anticipated through to 2025. In the long term however, this could become a constraint for growth across all London.</p> <p><u>Hotel capacity</u>: it is estimated that London needs at least an additional 23,000 hotel rooms by 2025 to sustain growth at predicted rates.<sup>12</sup></p>

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

<sup>11</sup> Implications of Brexit (Tourism Alliance 2017)

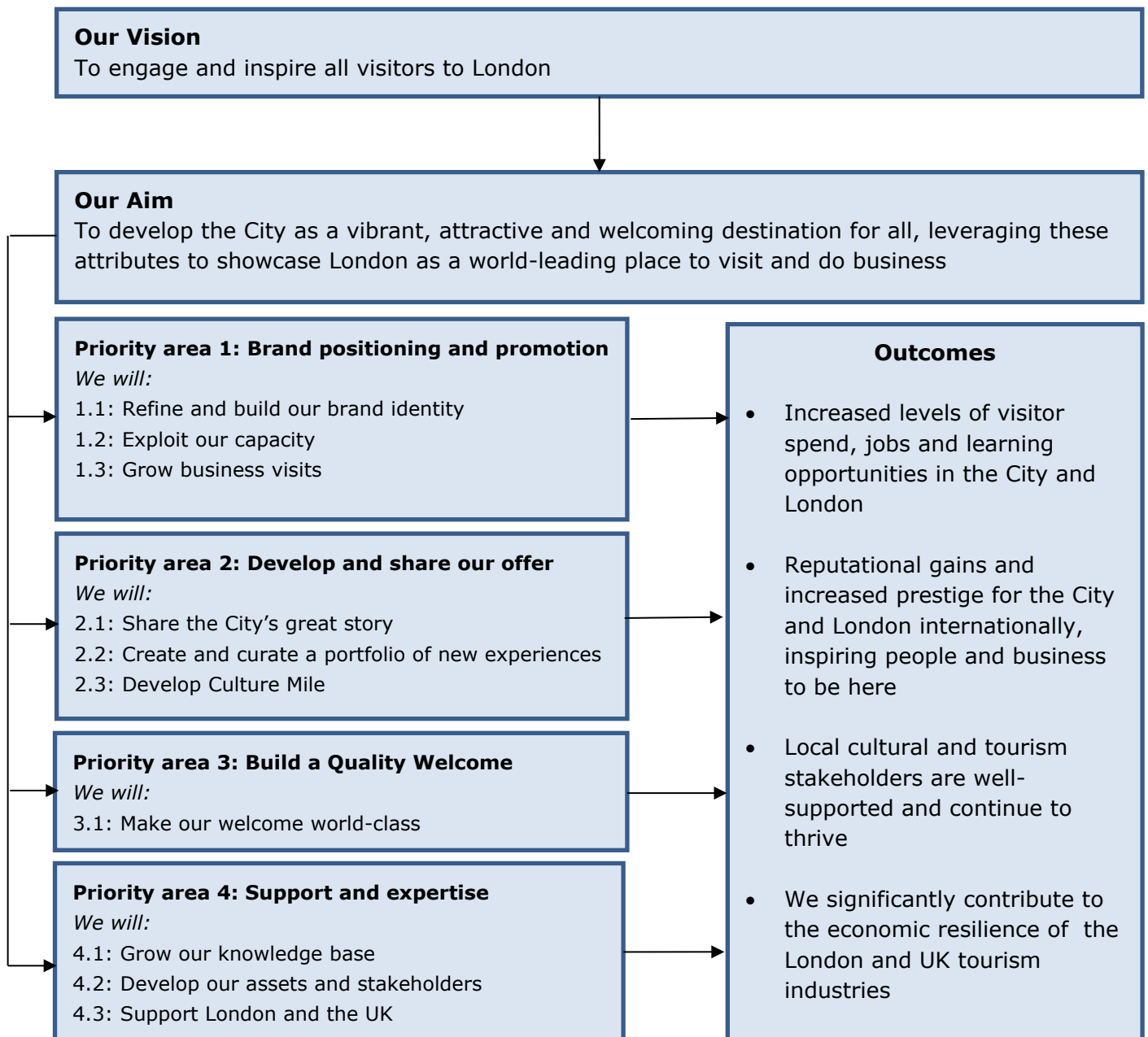
<sup>12</sup> A Tourism Vision for London (London and Partners 2017)

## 4 The Strategic Approach

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

### 4.1 Overview

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



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

- Working in partnership in an open, accessible and transparent way
- Practising responsible tourism and building 'good growth' for the City – targeting the right markets at the right times in the right locations
- Championing an environmentally-sustainable City – encouraging walking, cycling, pedestrianisation and use of 'clean routes'
- Creating a London for all Londoners – enabling all to benefit from growth and prosperity
- Ensuring appropriate and proportionate security measures are applied across all our visitor assets and programmes – making the safety and well-being of our audiences our primary consideration





## 4.2 Target Markets

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

Criteria for prioritising markets include:

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

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

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

## 5 Strategic Priorities

<sup>13</sup> A Tourism Vision for London (London and Partners 2017)

## 5.1 Priority area 1 – Brand Positioning and Promotion

### 5.1.1: Build and refine our brand identity

#### Rationale

The City is home to attractions and buildings that are international icons, steeped in history and perfect for rich and engaging storytelling. The depth of the City's heritage however, and the variety of its culture are not fully represented or reflected in public perceptions of the area<sup>14</sup>.

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

#### Areas for Action

- Position the City as a world-leading heritage destination and London's heritage centre. This will improve the profile of the City to heritage service providers – from heritage agencies to museums and interpretative experiences – encouraging them to see the City as the perfect place in which to conduct business.
- Promote the City's history and heritage both domestically and internationally:
  - Create London-wide campaigns that develop the "City of Old and New" concept
  - Create and/or seek joint ventures and campaigns that drive footfall between heritage destinations (such as that achieved in *England Originals* with England's Historic Cities)
  - Strengthen the City's alliance with Visit Greenwich and seek similar opportunities with heritage hubs within London
- Develop target-market-focused digital content that features the City's unique heritage and identity, distributing via social media and through our strategic partners.
- Further build the concept of "City of Discovery" promoting the City's many pop-up events and installations in the public realm (notably within Culture Mile and through the City's Outdoor Arts Programme) across social media channels specifically, targeting the markets identified below.
- Promote the City's cultural strengths as well as its quirky alternatives to mainstream consumption in order to drive visitor audiences, to include (but not limited to) City film locations and the fashion and textile industry around Petticoat Lane and Spitalfields.
- Develop a City-wide marketing and communications strategy to drive visitors', learners' and residents' awareness of our cultural offer, focussing on the anticipated increase in visitors with the Elizabeth Line in 2018/19 and working to engage the existing working population<sup>16</sup>.

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

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

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

## Markets Reached



### 5.1.2: Exploit our capacity

#### Rationale

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

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

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

#### Action Areas

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

## Markets Reached



### 5.1.3: Grow business visitors

#### Rationale

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

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

#### Action Areas

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

#### Markets



- Domestic
- International
- Conference organisers and delegates.

## 5.2 Priority area 2: Develop and share our offer

### 5.2.1: Tell the City's great story

#### Rationale

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

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

#### Action Areas

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

#### Markets Reached





## 5.2.2: Create and curate a portfolio of new experiences

### Rationale

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

### Action Areas

- Help develop new visitor experiences using our existing assets, such as the Central Criminal Court at Old Bailey, Mansion House and our Roman archaeology.
- Build the City’s riverside offer through the opportunities arising from the Illuminated River and Thames Tideway Tunnel (Blackfriars Foreshore) projects, using these as catalysts to deliver new day and night-time visitor experiences.
- Make the most of the City’s growing roof/skyscraper garden venues, by creating an umbrella “high-garden” brand/campaign, simplifying access and building a portfolio of bookable experiences.
- Promote the new Monument Visitor Centre and Tower Bridge experiences and use as a ‘gateway’ to other City experiences.
- Build and promote the City’s outdoor visual arts offer to include closer working with the Crossrail art and the City’s annual “Sculpture in the City” programmes.
- Develop an annual series of major outdoor events which celebrate the City’s unique character and heritage and help achieve global resonance.
- Support the development of the City Corporation’s Sports Engagement Strategy, supporting British bids to host major sporting events and utilising our cultural assets and programmes to develop the visitor welcome at appropriate activities.

### Markets



## 5.2.3: Develop Culture Mile

### Rationale

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

The raison d’être of Culture Mile is twofold; firstly, to contribute to shifting perceptions of the City, establishing it as a globally-renowned destination for culture, creativity and learning, as innovative and dynamic in the arts as it is in commerce; secondly, to help

develop the area as a vibrant and welcoming cultural, creative and learning destination for all.

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

### Action Areas

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

### Markets Reached



## 5.3 Priority area 3: Build a Quality Welcome

### 5.3.1: Make our welcome world-class

#### Rationale

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

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

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

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

#### Action Areas

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

### **Markets Reached**

All visitors – when already in London.



## **5.4 Priority area 4: Support and expertise**

### **5.4.1: Grow our knowledge base**

#### **Rationale**

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

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

#### **Action Areas**

- Maintain and extend the collection of destination level performance-related data held by the City, prioritising the build of our qualitative knowledge base.
- Develop insights into business visitor markets; specifically refresh our co-funded Business with Pleasure research.

- Define, agree and report outcomes aligned with our **Corporate Plan** to measure the success of this strategy, underpinning the measures already defined in section 7.
- Share our knowledge to encourage reciprocal exchange and to support and inform local, London, national and industry programmes and stakeholders.

## Markets



### 5.4.2: Develop our assets and stakeholders

#### Rationale

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

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

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

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

#### Action Areas

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

## Markets Reached



### 5.4.3: Support London and the UK

#### Rationale

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

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

#### Action Areas

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

#### Markets



## 6 Implementation

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

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

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

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



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

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

## 7 Outcomes and monitoring

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

These are summarised in the following table:

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

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

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

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



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

## 8 Summary

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

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

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

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

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

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

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

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