Visit the City: draft visitor strategy and action plan for the City of London, 2013-17

OUR CITY: **one square mile;** one tourist information centre; one synagogue; a concert hall; three public galleries; three cinemas; three theatres; six museums; seven Underground lines; seven mainline stations; 13 tube stations; 14 night bus routes; 20 conservation areas; 20 hotels; 40 high-frequency bus routes; 40 livery halls; over 50 churches and towers; over 200 gardens, churchyards, parks and plazas; around 250 pubs and 580 restaurants; luxury shopping and high-street brands; over 600 listed buildings: **8.9million visitors a year**

I. Foreword

A word from our Chairman

The City: welcoming the world since AD50

The City is the birthplace of London – mother of a thriving metropolis and the place from which the London we know today once grew. As such, it's been welcoming the world for nearly 2,000 years – from the Romans to the business visitors who jet in daily to be part of the global financial powerhouse that this small and distinct area of London has become.

Geographically, the City is well-placed. It sits at the heart of London, a short walk from the pizzazz of the West End, historic Southwark and the South Bank, and bordered by vibrant and colourful markets at Spitalfields and Brick Lane. Yet there's little need to leave, for the City's extraordinary past and enviable present mean that it is packed full of things to see and do, from heritage attractions and the iconic structures that house the financial and business institutions for which it's known, to a top-class cultural programme that boasts the Barbican and City of London Festival amongst its providers.

With only a small resident population and a workforce occupying their offices in working hours, there's plenty of room for the leisure seeker and the business traveller with an opportunity to explore, and the message is "you're invited". It's an experience you won't find elsewhere in London, because the City has an unparalleled history, from Roman remains and its unique collection of Wren churches to some of the world's best-loved heritage attractions and the priceless treasures displayed in its galleries and museums.

Such a unique destination needs unique management and that's where this strategy comes in. A restructure in late 2011, has seen our visitor development activity move department to join some of the attractions we manage, with a dedicated team tasked with delivering a compelling visitor offer and promoting it to the widest possible audience.

Our first priority was the 2012 Games, and this strategy builds on that, exploring the ways in which we can increase and develop our contributions and support for the London and national visitor agendas and cementing the many relationships we forged in the year with projects like *Celebrate the City!* which saw over 90 City partners working together to deliver a programme of events seen by thousands.

While partner working lies at the heart of this strategy, sharing an office with the business brains behind our attractions has helped us to focus on the bottom line and, for the first time, we explore opportunities for commercial growth, sponsorship and revenue generation, acknowledging that in the current climate our core funding is likely to diminish and new sources of income will need to be found.

It's not all about money though. As ever, the strategy seeks to identify areas where we can enhance the visitor experience, it determines where best we may direct our efforts to ensure every visitor is able to enjoy this great place, regardless of economic, social or other barriers and it examines ways in which we can build footfall when the City is less busy.

This, the City's third visitor strategy, seeks to be more outward looking than its predecessors. Actions focus on connecting with the green spaces we manage outside the City and the 17 million people who visit them each year, as well as working more closely with our partners and the agencies who deliver tourism for London and the UK. In so doing, we will be more able to develop our support of the industry at a local and national level and strengthen our reach in international markets.

With 2,000 years of welcoming the world, we think we're ready; and so we invite you – whoever you are – to come and soak up the past, to marvel at the present and to be a part of our future. We welcome you and we commend our strategy to you, something that, we hope, will ensure your experience is one of the best.

John Scott
Chairman, Culture, Heritage and Libraries

II. Introduction

What's in this document and why we've produced it

This is the third visitor strategy for the City. It sets out our achievements to date and builds on the great work that has been delivered through the preceding strategies (see p21), the last of which concludes this year (2013). The document is divided into two main parts – a visitor strategy which describes aims and priorities for the period 2013-17, and an action plan which outlines the headline tasks we will undertake to achieve them.

The **strategy** (p13) seeks to provide a framework for the delivery of the City Corporation's visitor services, providing a clear statement of our vision for the assets we control and the areas over which we may have influence within the City area. From this, a series of strategic aims and priorities has been developed. These will inform our visitor activities for the next five years with the priorities providing the criteria against which we will assess opportunities arising.

The **action plan** (p16) describes the headline activities we will undertake to achieve our aims. Noting that our work must respond to ever-changing circumstances within the visitor landscape, the plan will be updated annually to reflect market trends, the needs of our partners (local and national) and issues emerging.

Across all of its roles, the City Corporation needs a visitor strategy so it can:

I. **consider and prioritise** the competing pressures of providing a welcoming environment for the City's communities – residents, workers and visitors – and ensure that these may co-exist in harmony, deriving benefit for all
II. **identify and represent** the needs of its own visitor assets and those of its many stakeholders, especially in the visitor services, cultural, retail, hotel and hospitality sectors, and deliver a structured framework for collaborative working
III. **support and reflect** the priorities of its complementary strategies, especially the Cultural and Communications Strategies, and **deliver** specific elements of its Local Plan and Corporate Plan, building the cultural and visitor dimensions of the City's attractiveness and delivering training opportunities within the sector for young people from the City Fringe
IV. **promote** a shared understanding amongst Members and staff of its priorities in the visitor context
V. **manage** its significant investment in visitor services and **identify** where best it may deploy resources to deliver growth for the City's visitor economy
VI. **deliver** benefit to London and the nation in the context of tourism and build on its existing support activities, which currently include the provision of:
    - central London's only official tourist information centre (TIC) which promotes London and national product as well as City assets in support of the UK tourism growth exploiting London's role as gateway to the nation
    - a portfolio of world-renowned visitor attractions that strengthen London's offer and drive footfall
    - bespoke training in London product knowledge for the GLA's Ambassadors, enhancing London's welcome as well as sector training in the City Fringe
    - visitor and promotional services for London and national programmes and events, helping to showcase London in its best light and drive footfall
    - hospitality for delegations related to the programmes and events described above, delivering profile for activities at the highest level

III. Who we are, what we offer and resources

Our reasons explained

WHO WE ARE

The City of London Corporation is a uniquely diverse organisation. It supports and promotes the City as the world leader in international finance and business services and provides local services and policing for those working in, living in and visiting the Square Mile. It also provides valued services to London and the nation. These include the Barbican Centre and the Guildhall School of Music & Drama; the Guildhall Library and Art Gallery and London Metropolitan Archives; a range of education provision (including sponsorship of three City Academies); five Thames bridges (including Tower Bridge and the Millennium Bridge); the Central Criminal Court at Old Bailey; over 10,000 acres of open spaces (including Hampstead Heath and Epping Forest); and three wholesale food markets. It is also London's Port Health Authority and runs the Animal Reception Centre at Heathrow. It works in partnership with neighbouring boroughs on the regeneration of surrounding areas and the City Bridge Trust, which it oversees, donates more than £15m to charity annually.

WHAT WE OFFER VISITORS

The attractions, venues for hire, visitor services and events managed, facilitated and/or funded by the City Corporation for the enjoyment of Londoners, the UK and our international visitor communities include:

VENUES & ATTRACTIONS

- Barbican Centre
- City Business Library
- City Information Centre
- City Marketing Suite
- City of London Police Museum
- Clockmakers' Museum
- Dr Johnson's House
- Gresham College
- Guildhall
- Guildhall Art Gallery
- Guildhall Library
- Guildhall School of Music & Drama (including Milton Court)
- Keats House*
- Leadenhall Market
- London Metropolitan Archives
- London's Roman Amphitheatre
- Mansion House
- Monument
- Museum of London
- Queen Elizabeth's Hunting Lodge*
- Temple Bar
- Tower Bridge Exhibition*

EVENTS/EXHIBITIONS & COMPANIES

- Cart-Marking Ceremony
- City of London Festival
- London Maze
- London Symphony Orchestra
- Lord Mayor's Show
- Sculpture in the City
- Spitalfields Music*

OPEN SPACES

- Burnham Beeches and Stoke Common*
- City Commons*
- City Gardens
- City of London Cemetery and Crematorium*
- Epping Forest*
- Hampstead Heath*
- Highgate Wood*
- Queen's Park*
- West Ham Park*

* Provided by the City Corporation but located beyond the City

WHY WE WELCOME VISITORS

The City Corporation invests in these services and contributes to the local, London and national visitor agenda:

1. **as a provider of local government services for the City**, championing the interests of visitor attractions such St Paul's Cathedral and other City service industries including hotels, retail and restaurants
2. **as a provider of local government services for workers and residents** – by creating better places to live and work, the City becomes a better place for visitors as improvements benefit all communities
3. **as a good neighbour**, representing the interests of those that make up London's central visitor cluster, eg Tower of London (Tower Hamlets) and delivering training opportunities for young people from the City Fringe

4. **as a provider of visitor attractions and services** both within and outside of the City, eg Tower Bridge, Epping Forest, Keats' House and the City Information Centre
5. **as a steward of London's heritage**, providing the widest possible access to treasures such as the 1297 Magna Carta and Shakespeare deed
6. **as the UK's fourth most significant sponsor of arts and culture**[1]**,** delivering audiences to warrant our investment
7. **as guardian and champion of the business City** and UK financial and business services, recognising the importance of business and event-led tourism to the UK economy
8. **as a provider of venues for hire for corporate and business events**, eg Guildhall and the City Marketing Suite
9. **as a provider of services to London and the nation**, recognising the importance of the visitors to the London and national economy

THE IMPORTANCE OF VISITORS TO THE CITY

Visitors play a significant role in supporting the economic growth of the City and the quality of life for residents and workers; here's why:

10. **Without visitors, the City would lose a significant element of its appeal as a place to be:** the City's global position in financial and business services is attributable to a number of factors including the attractiveness it derives from its heritage assets, museums, galleries and cultural institutions. Most of these would cease to exist without visitors to sustain them or would become a burden on the taxpayer, if visitors did not continue to support them.
11. **The leisure visitor provides essential revenues for City retail and so adds to the City's appeal:** City workers and visitors run to different schedules; visitors arrive after rush hour when transport is cheaper and they leave in staggered groups. City retail needs their patronage; without it, some shops, bars and restaurants may close; with more of it, more will open and the City retail offer will be stronger adding to the City's appeal.
12. **The City's ability to attract business visitors for meetings, events, conferences and trade shows is an essential part of its on-going success as an international business centre:** without the City's hotels and serviced apartments, businesses could not welcome staff and delegations from overseas or from other parts of the UK. The business events they attract and – at weekends – the leisure visitors they serve provide much-needed revenues; both of these audiences are targets of this strategy
13. **When the working populace is absent, the City's capacity for visitors is vastly under-used**: directing visitors to a particular day is a tricky task; to *attract*, a destination must be *attractive* and a City Sunday, with few shops open, most attractions closed and no real sense of on-street life, can be off-putting. While growth at weekends is improving, it's slow. The more visitors we attract, the more shops and attractions will open so attracting more visitors – it's a cycle that provides greater revenues for assets and strengthens our offer.

WHAT WE OFFER LONDON

The City Corporation and its visitor community have a major role to play in London's continued success as the world's most visited city. As well as the many assets and services the City Corporation provides (see previous page), it will, through the actions in this strategy:

14. **Play its part in ensuring the importance of London's tourism offer to the local and national economy is sustained and that the industry's role as a significant employer, especially of young people, continues:** the City is the oldest part of London, home to some of the world's best-loved attractions and the financial and business heart of the UK; whether invited or not, visitors will come – the City Corporation will contribute to local and national growth by positively welcoming those that do and ensuring that its assets (both within and outside of the City's walls) are an integrated part of the London offer, so strengthening the capital's and the UK's appeal. At the same time, it will deliver opportunities for training through its assets and the expertise of their staff,

[1] The City Corporation's sponsorship of arts and culture is surpassed only by the Government, the BBC and the Heritage Lottery Fund

providing the relevant skills and experience for continued success of London as a destination.

15. **Exploit opportunities for hosting high-profile visitor events, so contributing to London's position as a world City:** the City and City Corporation assets such as Epping Forest are integral to London's ability to deliver major events because they have many of the camera shots that international broadcasters want – St Paul's, Tower Bridge etc – and/or provide a green and pleasant environment for large scale sporting and cultural events. The City is also centrally located – easy to get to for visitors with significant capacity at weekends, when many inner-City events take place.
16. **Continue to build on the City's pre-eminence as a world centre for business and finance** so sustaining its appeal to visitors as a distinct district of London as well as developing London's attractiveness as a place to do business

GEOGRAPHIC LOCUS

The City Corporation has had a visitor strategy since 2007. In all iterations, the strategy's locus has been the geographic area that is the City and it has functioned as a destination marketing plan, promoting the City area as a place to visit. This year, we will extend our reach to ensure:

- we **connect with our neighbours** (particularly those to the east of the City), driving two-way traffic between visitor hubs and delivering benefits to all parties
- we **connect with City Corporation sites beyond the City** (such as our open spaces) driving two way traffic and securing recognition for our wider role and remit
- we **deliver services in support of wider London and the nation** deriving recognition for our role and contributing to the health of the UK's visitor economy

As such, the 2013/17 Visitor Strategy considers the City and the City Corporation in context of the London and national tourism offer. We are not a fortress and by establishing the links and relationships described, we will draw and add strength to one another's appeal.

RESOURCES

The backdrop to this strategy's vision (p13) and the targets outlined on p10, come at a time of continuing challenges for the nation. Forecasts vary but the economic climate is likely to remain difficult, with limits on money to be had from public funds or corporate sponsorship. While the City Corporation retains its commitment to visitors within these challenges, **the plans outlined in the strategy are predicated on the assumption that funding may diminish.** The strategy therefore seeks to maximise its impact and deliver increased profile and growth, with added value and resources being derived from newly-developed revenue streams, entrepreneurship, collaboration and partnership working.

IV. Strategic context

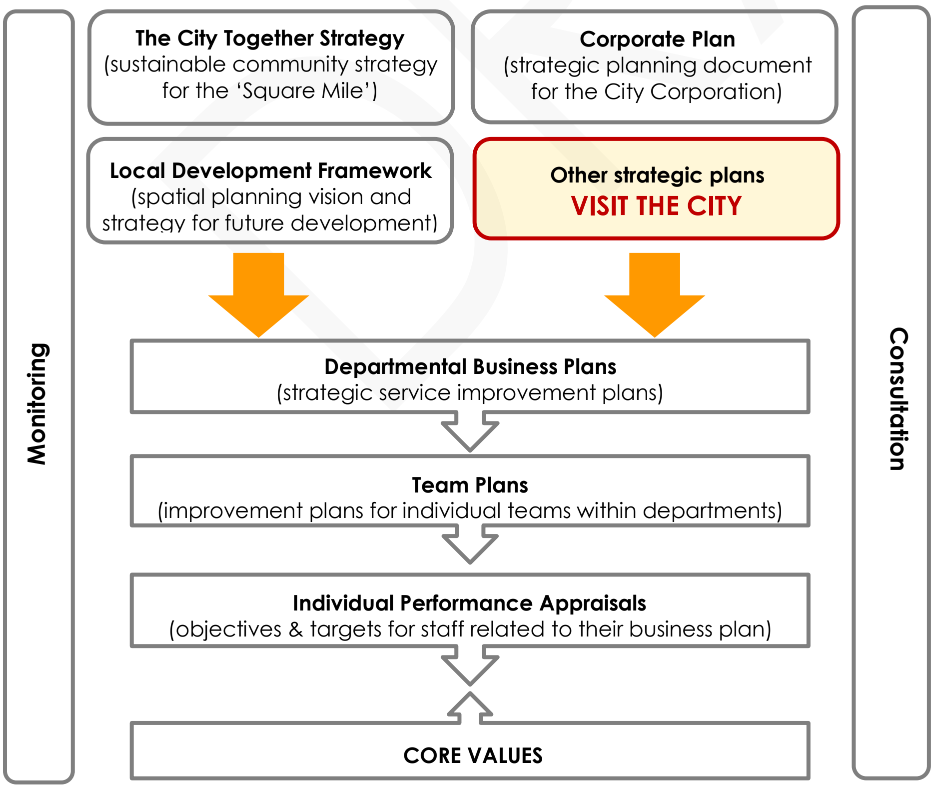
Where the strategy sits

On a national level, this strategy reflects the Government's Tourism Policy (DCMS, March 2011), the policies, strategies and plans of other relevant Government departments and those of a number of national and London tourism bodies including the *Strategic Framework for Tourism in* England and the national target this cites of 5% year-on-year growth. It is aligned with the visitor marketing and business plans of London's Boroughs, BIDs and visitor services consortia and seeks to support the strategies and plans of the City's visitor services stakeholders (including the City Corporation's own visitor assets). In so doing, it provides the glue that will knit common priorities together and gives us the opportunity to speak with a collective voice, the whole being stronger than the sum of our parts.

***Fig. 1:** the strategy's national context*

In an **organisational** context, the strategy is part of a group of strategies within the City Corporation's planning cycle (*The Golden Thread* – see ***Fig. 2***). It sits under the Corporate Plan, informed by and reflecting the Plan's strategic priorities, as well as those within the City's community strategy (*The City Together*) and its Local Plan. In turn, *Visit the City* will influence and inform City Corporation departmental and team plans.

***Fig. 2:** the strategy's context within the City Corporation's "Golden Thread" planning cycle*



The strategy shares its position within the City Corporation's planning cycle with a number of other "core" strategies. These include the Cultural Strategy 2012/17 and the Communications Strategy 2013/16, both of which it reflects and informs (as shown in ***Fig. 3***).

***Fig. 3:** The strategy is aligned to, reflects and influences other core strategies*

V. Audience context and target markets

AUDIENCES

This strategy considers visitors in their widest context – domestic and overseas business and leisure visitors, overnighters and the day-trippers who make up the majority share of the City's visitor community (58%) and are its most valuable audience group. In addition, it considers workers and residents in their capacity as users of the City's cultural and visitor assets.

MARKETS

These audiences can be separated into two main market groupings:

1. **Overseas and domestic leisure visitors**, eg:
   - day and staying visitors
   - group travel
   - business visitors returning with family and friends
   - Workers and residents in pursuit of recreation
   - Visiting friends and relatives (VFR)
   - Londoners in pursuit of leisure (local, not City residents or workers)
2. **Overseas and domestic business visitors**, eg:
   - conference and business event delegates
   - trade show exhibitors
   - working visitors (eg event delegates or those on short-term work trips)

TARGETS

Within these groups, **the strategy directs its focus where it will have greatest impact – at markets with significant value and/or growth potential for the City**, these include:

- the **BRIC[2] markets** (global tourism is expected to grow by 60% by 2020, half of this growth coming from the BRIC countries, with particular value placed on China)
- **traditional overseas markets** (while some of these markets are receding, they are still the highest in terms of volume and value for the City; in particular, Western European markets are vital to the business success of the City's hotels)
- **domestic tourists** (a significant growth market that may fluctuate in size if Britons opt for warmer climes because of bad weather or a strong pound, or if the economic situation worsens inhibiting their ability to spend – bad weather is less likely to impact on visitor numbers to the City because most activities are not weather dependent)
- **day-trippers** (the closer to the City a day-tripper lives will inspire a potentially greater frequency of trips; we will therefore seek to prioritise **Londoners, those living within easy reach of the City** (from neighbouring boroughs or on commutable routes that terminate in the City) and **domestic tourists already *in* London**)
- **weekend markets** (anticipating that more visitors will incentivise more businesses to open at weekends and so, in turn, generate more crowds, we will seek to deliver sustainable footfall at these times by targeting local Londoners and groups for whom the comparative quietness of the City will be an advantage, focussing not on the City's attractiveness, but rather on its *convenience* as a place to visit or shop, and highlighting free-parking, the capacity on public transport and crowd-free streets)
- **business visitor markets** (meetings, conferences and events are estimated to earn £16.3bn[3] a year for the UK economy with visitors spending an average of 72% more on a daily basis than those on a leisure trip and around 40% of them being likely to return for leisure purposes - this was the only visitor market to see national growth in 2012)
- **strategic markets** (the City Corporation is committed to sharing its collections with the widest possible audience, regardless of physical, social or economic barriers; in recognition of this we will focus on meeting the needs of special groups underrepresented in the City's visitor profile, developing our diversity of offer)

The groups listed above are our **primary targets**.

City worker and resident communities are **secondary targets.** This is because they are sustained and grown under *other* policies and strategies promoted by the City Corporation.

[2] Brazil, Russia, India and China

[3] www.britainforevents.co.uk/20-facts-that-prove-events-are-great-in-britain.html

VI. The importance of partnership

Achieving our goals through collaboration and partnership working

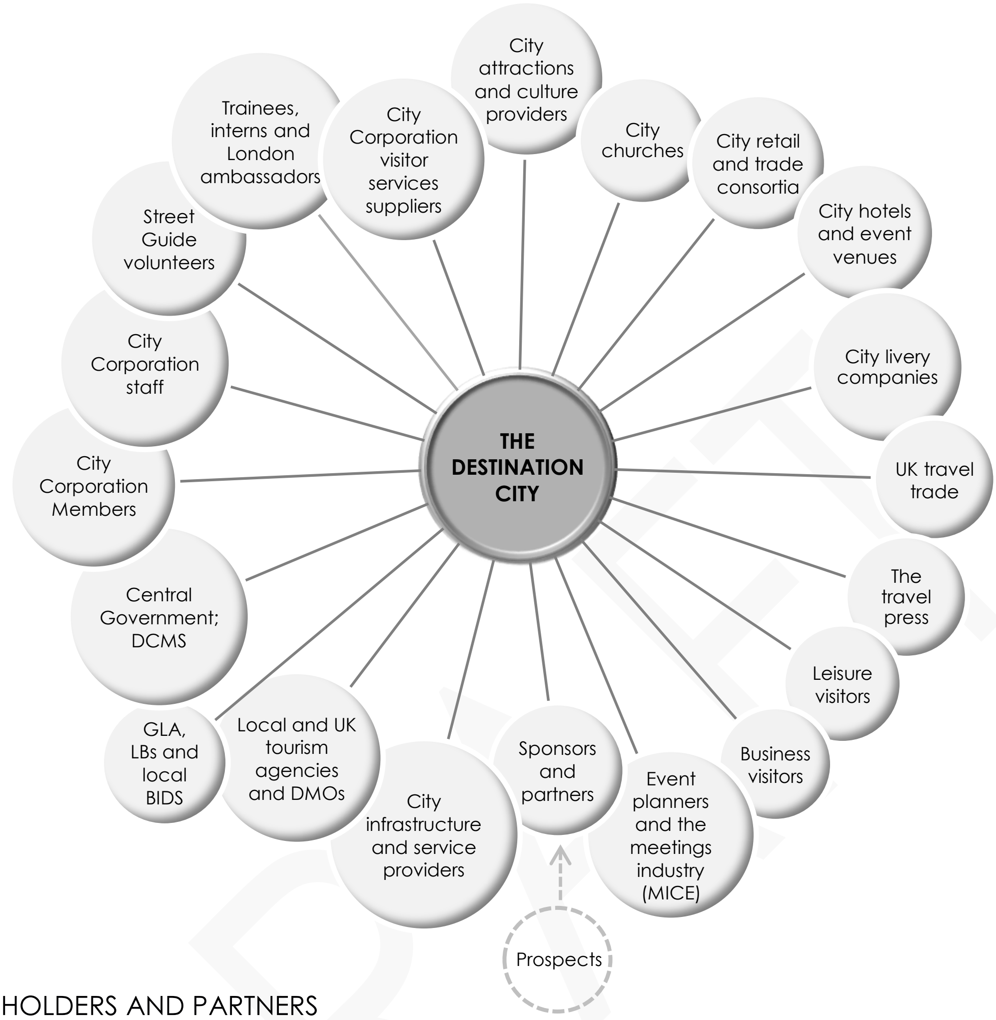


Fig. 4: *City visitor strategy stakeholder map*

STAKEHOLDERS AND PARTNERS

This strategy seeks to deliver benefits for all groups with an interest in the City as a visitor destination as shown in ***Fig. 4.*** To do so, the strategy must be a partnership and this lies at the heart of all of the actions outlined on the following pages. Together, the City is stronger and initiatives such as the *Celebrate the City!* event in 2012 which saw 93 City partners working collaboratively to bring crowds in excess of 27k to Cheapside and thousands more to other events in venues and on-street, is a great example of what can be achieved.

Not least of these partners are the City's non-Corporation-owned attractions such as St Paul's Cathedral and the Tower of London, as well as its retailers, hoteliers, livery companies, churches, guides and arts providers. Ensuring regular dialogue, exploring opportunities for collaboration and securing their participation will be encouraged through:

- The continued facilitation of the **City Visitor Attractions and Retail Group** (VARG), which meets quarterly
- A more formal arrangement for regular dialogue with hotels through the currently ad hoc **City Hotels Forum** (CHF) and the provision of networking opportunities with the VARG
- The continued facilitation of the **City Culture Network** (CCN), which meets at least bi-annually
- City Corporation involvement and support of formal business event groupings such as the **City Selection**
- The promotion to these groups of offers and opportunities for involvement in wider London and national visitor promotions afforded by the City Corporation's partnerships with agencies such as **London & Partners** (Platinum Member), **VisitEngland** and the Association of **Leading Visitor Attractions** (ALVA)

VII. The importance of visitors and our growth targets

Value, volume, economic impact and targets

The value of visitors to the City in 2012 is estimated to be £843m – this represents an increase from £695m in 2009 (9.8% excluding inflation).

When this figure is broken down, the major importance of the day-tripper audience to the City can be recognised, accounting for almost two thirds of total visitor spend:

- **Day visitors from home accounted for £493m (58%)**
- Overnight domestic visitors accounted for £89m (11%)
- Overnight overseas visitors accounted for £261m (31%)

The table below details the value *and volume* of visitors to the City and to London as a whole.

Volume and value of Tourism:				
	Domestic overnight	**Overseas overnight**	**Day visitors**	**Totals**
All London (2012)[1]				
Number of trips (m)	12.15	15.46	279.00	306.6
Number of nights (m)	27.70	94.30	-	122.00
Total spend (£m)	2780.00	10080.00	10900.00	23760.00
Average spend per trip (£)	228.00	650.00	39.00	77.50
Average spend per night (£)	101.00	107.00	-	105.00
City of London (2012 estimates)				
Number of trips (m)	0.39	0.40	8.15	8.94
Number of nights (m)	0.88	2.44	-	3.32
Total spend (£m)	89.00	261.00	493.00	843.00
Average spend per trip (£)	228.00	650.00	60.40	94.00
Average spend per night (£)	101.00	107.00	-	105.00
City as % share of all London (estimate)				
Trips (%)	3.2	2.6	2.9	2.9
Nights (%)	3.2	2.6	-	2.7
Total spend (%)	3.2	2.6	4.5	3.5

Fig. 5: *the value and volume of tourism to the City and to London*[1]

Note on approach to 2012 figures: *The 2012 value figures are based on an extrapolation of data from the 2009 LATI model. The extrapolation of overnight figures (for domestic and overseas visits) considers the differences in spend across London between 2012 and 2009 and was based on GBTS and IPS data. Implicit in this approach is the assumption the City's share of tourism has remained broadly the same during this period. The day visitor figures have been extrapolated by visits to attractions data (based on the difference in attendances in 2012 and 2009), with inflation applied to the spend.It should be noted that this approach is a relatively pragmatic one that seeks to provide a value estimate with readily available data. The figure should be treated as an indicative estimate.*

While the City's share of footfall and spend (at only a few per cent of the all-London total) may initially seem disappointing, it should be balanced with a few considerations:

- At approximately 1.12 sq miles, the City takes up an area of 0.18% of all London (607 sq miles); this means that **its share of London's visitor spend is more than 18 times greater than its share of footprint**, similarly its share of overnight stays is 14 times higher and its share of all trips to London 15 times higher
- The City's **stock of 20 hotels with their 4156 bedrooms** (3% of London's total[4]) cannot compete with Westminster (39%) and other boroughs where hotel stock is significantly greater; **this constrains our ability to achieve a large volume of overnight visitors and significantly impacts on our visitor spend figures** (because total revenue from rooms is potentially a high proportion of visitor spend); demand for new hotels within the City is expected to continue leading to modest hotel growth that will be balanced with

[4] London's total hotel bedroom stock = 139,048; 2012 Census of Serviced Accommodation Stock, Visit England

other planning priorities – these include the need to protect office-based employment space as outlined in the City's Local Plan

- **The City ranks ninth out of London's 33 boroughs in terms of value and volume of tourism** in the London Development Agency's Local Area Tourism Impact (LATI) model 2008/9 (this has not been updated since)
- **Of the nine central London Boroughs** (Westminster, Camden, Kensington and Chelsea, Islington, Tower Hamlets, Lambeth, Southwark and Hackney) and based on the 2009 LATI results, **the City enjoys, 5.3% of total visitor spend and 6.5% of day-visitor spend** – with a total area of 65 sq miles shared between the nine boroughs, the City's proportion of visitor spend would only be 1.7%, if all other factors were equal

2012: A SPECIAL YEAR
From the City's own Visitor Attractions Monitor (VAM), which collates footfall at all of the main City of London attractions, **a slight increase in visits has been recorded for the year** (2011 = 5.45m, compared with 2012 = 5.47m).

This increase is surprising given the specialness of 2012 which, with the Games, saw **visitor numbers to attractions nationwide plummet** in the summer months. The City reflected this trend, with one of our attractions recording as much as a 57% drop in numbers on a specific day in July.

Certainly, the pattern across the year is unusual compared to those seen previously (see ***Fig. 6***, below) with visits peaking in the second quarter (April to June) and the busiest months being April (11.1% of the annual total) and June (9.9%). **This variance can probably be attributed to a rise in those visiting London before the perceived expense and congestion of London during the Games and the popularity of the Diamond Jubilee celebrations** in early summer. With little doubt, the significant drop in visits in the third quarter – traditionally the peak for City attractions but down 13.8% on 2011 – is a direct result of an overall fall in visits across the UK and visitors taking to sporting venues and Live Sites rather than enjoying more traditional visitor habits.

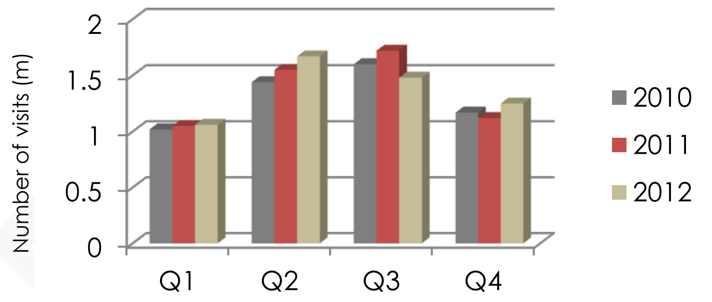


Fig. 6: *the City's Visitor Attractions Monitor showing number of visits to City attractions for the period 2010-12*

It is an experience that's been seen elsewhere: VisitEngland[5] highlighted that, in the year to November 2012, 43% of English attractions were down on the same period in 2011. However, recovery has been quick and **while visitor numbers plateaued across English attractions in 2012, the City saw an increase year-on-year**, albeit slight. **The real legacy of the Games is now, and first quarter figures for 2013/14 are showing a significant upsurge in visitor numbers for the City** and London generally. This trend looks likely to continue with predictions from London and Partners suggesting strong growth well into 2015 and beyond.

GROWTH TARGETS 2013-17
Acknowledging that forecasting growth is a tricky business as influences such as the weather, acts of God or other factors can impact heavily on set targets, this strategy seeks **to grow the City's visitor economy at a rate not less than that for all London and/or England (whichever is the greater) as measured by London and Partners and VisitEngland** (the national target is 5% year-on-year, including inflation). It also seeks **to increase its Visitor Attractions Monitor** (see *Fig.6* above) as part of this, **by not less than 4% within the lifetime of the strategy** (2017) and to establish a benchmark for business tourism against which growth can be measured and targets set.

[5] Tourism Business Monitor – Visitor Attractions Report (Wave 5 – Post-October half Term) – VisitEngland (Nov 2012)

VIII. Opportunities and threats

Hot topics and barriers to growth

THE NATIONAL CONTEXT

The UK is perceived to be a costly place to visit[6], with growth being hampered by a number of taxation issues. With some creative thinking, lobbyists suggest things could be turned around:

- The cost of **Air Passenger Duty (APD)**[7]**,** it is suggested, could be replaced with EU Emissions Trading resulting in a potential £4bn increase in GVA, over 100k more jobs and increased tax revenues of almost £2bn elsewhere in the economy by 2020
- If **Tourism VAT**[8] were reduced on key tourism services such as accommodation and entry to attractions, research shows that GDP is likely to increase by £4bn a year, 80k jobs would be created over 2 to 3 years and the Treasury would receive £2.6bn over ten years
- **Visa costs and the rigour of our applications processes**: a short stay visa for the UK costs £78, compared to around £53 for a Schengen visa, which allows access to 25 countries[9]; while positive steps were taken by Government to streamline visa processing in China last year, more work needs to be done to achieve a competitive position

In addition to issues of taxation, some headline opportunities and threats that may also impact on growth at a national level are as follows[10]:

- **Economic stress in Europe:** the economic stress felt in the Eurozone has resulted in a 2% decline in visitor numbers from this area which, while a small percentage, is particularly significant for London as two-thirds of the capital's visitors are Europeans; the burgeoning markets of Brazil and Russia have helped to offset this decline
- **The strength of the pound to other currencies**, **especially the Euro**: a strong pound means less visitors, higher prices and lower visitor spend
- **The next Comprehensive Spending Review**: further cuts in public spending may result in a reduction of services funded by the public purse and see fewer tourism information centres as well as diminished remits for national and local tourism bodies
- **The projected growth of tourism for England:** it is anticipated that the national visitor economy will grow over the next five years resulting in interest and support from Government and other bodies such as BIDs, local chambers, LEPs and town centre management teams; the challenge will be to ensure that this support is not just marketing-focused and that efforts are co-ordinated, not duplicated
- **The moving of one of the May Bank Holidays (England and Wales) and the introduction of single double summertime (SDST):** two opportunities, the first proposed by Government in their national tourism strategy which will extend the summer season for domestic visitors (if the bank holiday is moved to October) or create a "national" day (if moved to St George's or St David's Day); the second – the introduction of SDST – would extend the part of the tourist season that is dependent on daylight hours by two months, and enable later closing of tourist facilities, increasing the attraction of off-peak and short-break holidays and simplifying international timetables; both are likely to swell visitor numbers
- **Our Games-time legacy**: with pictures of the City, London and the UK broadcast across the world and generating aspirations to visit in the minds of many, now is the time to act and harness our Games-time efforts; without exception, host cities enjoy a significant upsurge in visitors in the first few years after the Games and it is anticipated that London could see incremental growth of up to one million more visitors over the next few years
- **The weather**: a summer of rain in 2012 may result in the domestic visitor market seeking locations in the sun and a resultant dip in "stay-cationing" although this is likely to impact on destinations outside of London more
- **A natural disaster or significant terrorist threat** grounding flights to and from the UK and/or discouraging visitors because of perceptions of safety

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[6] The UK ranks second from bottom out of 140 nations assessed for price competitiveness in the 2013 World Economic Forum Travel and Tourism Competitiveness Index
[7] All references taken from Tourism Alliance, "UK Tourism Statistics 2012"
[8] All references taken from The Campaign for Reduced Tourism VAT, "Campaign Fact Sheet", November 2012
[9] Travelling in Europe has been simplified with the introduction of the Schengen visa which allows visitors to enter one country and travel freely throughout the Schengen region during the validity of the visa. Internal border controls are limited with no or few stops and checks. At present, there are 25 Schengen countries, all in Europe
[10] A detailed synopsis of these and other opportunities and threats are outlined in VisitEngland's *Strategic Framework For Tourism 2010-20*

THE LONDON CONTEXT

The headline threats facing the growth of London's visitor sector relate to transport:

- **Airport capacity**: London is the gateway to the rest of the UK; the ramifications of no new runways at Heathrow in particular will be felt on a national scale with other European cities taking advantage and winning business ahead of the capital
- **Cost of travel**: the recent rises in train and tube fares see London topping a league table of 20 major cities worldwide as the most costly for travel[11]; the reduced fares offered by Oyster and the new Visitor Oyster Card help to redress this

The news is not all grim and the opportunities afforded by the introduction of **Crossrail**, the strength of London's broadband infrastructure and the launching of **large-scale London and national events** such as Ride London, the Tour de France, the Rugby World Cup (2015) and the Magna Carta 800 celebrations, all present opportunities which this strategy will seek to exploit.

THE CITY CONTEXT

Headline opportunities and threats facing the City include:

- **On-street trading:** the appeal of events in the City is limited because there are few opportunities for on-street trading, leaving programmers to "fill" large spaces with activities that add to costs and make no revenues through sales; the progression of the City's Various Powers Bill will enable the City Corporation the ability to grant temporary on-street trading licences
- **Events and retail**: research for large-scale events has shown that they are of little benefit to shops but of high value to eateries, bars and coffee shops; positive feedback from retailers has been received more because of the promotion of area than any revenue gains[12]
- **Weekends:** shops and attractions that don't currently open at weekends remain reluctant to do so because of the small number of visitors; with the introduction of a **full weekend service on the Waterloo and City Line in summer 2013**, this situation may change, but without a fuller offer to entice them, visitor numbers are not likely to increase
- **Retail generally:** much has been done to promote the City's retail offer, especially at weekends, but this has focussed on positioning the City as a viable alternative to the West End – something of a myth; the City's offer is limited for visitors and suggesting the same range of experience as Oxford Street or Westfield is misleading – the City Corporation's Local Plan addresses this issue, focussing efforts on improving the offer in the City's Principal Shopping Centres (PSCs) and enhancing the routes between them
- **Budget hotels**: the City has seen a number of budget hotels open in recent years, with 25% of all stock now being promoted by Premier Inn or Travelodge; this will not only help to swell visitor spend through the revenues derived from bookings but also make the City a more accessible destination in which to stay for those with limited budgets
- **Guildhall Yard**: the Guildhall Strategy has been working to promote Guildhall Yard as a public space to be enjoyed by all but, while physical enhancements have made it more pleasant, it will not become a visitor hub unless the City Corporation sacrifices income from commercial hires and gives over specific times when activity can be programmed
- **Architecture and street art:** the on-going development of new and iconic architecture in the City, especially buildings with public access like the "Walkie Talkie" and its proposed "Sky Garden" as well as projects like *Sculpture in the City*, continue to add to the City's attractiveness for the visitor and drive footfall
- **The closure of the Southbank Centre (SBC)**: the anticipated £120m overhaul of the Southbank Centre will see it close for a period of two to three years[13]; this closure may cause displacement with more coming to the City to enjoy its cultural offer and, conversely, the reopening of the new SBC may result in depleted audiences
- **Filming:** according to the TRAVELSATC Competitive Index, encouraging filming in a destination is an efficient driver for attracting visitors, especially the young and those from the BRIC countries. On average, 1 to 10 visitors out of 100 choose a destination thanks to movies
- **The demise of the London Development Agency:** the loss of the LDA's Local Area Tourism Impact (LATI) model from which much City visitor data is extrapolated will require the City to introduce new data collection mechanisms and techniques although there is potential that the gap may be plugged by the Greater London LEP, formed in 2011

[11] http://www.standard.co.uk/news/london-has-most-expensive-commuter-travel-in-the-world-7303602.html
[12] For *Celebrate the City!*, restaurants reported an increase in sales (39%) and retailers a negative impact (24%)
[13] http://www.standard.co.uk/news/london/glass-pavilion-in-the-sky-will-transform-the-cinderella-southbank-8522568.html

The Visit the City vision and its strategic aims (2013-17)

OUR VISION

The City of London is the destination of choice for the business traveller, event organiser and leisure seeker. Renowned for the warmth of its welcome and quality of its visitor offer, it is a place where culture, heritage and business collide to create a unique and compelling experience, seven-days-a-week.

As such, the City significantly contributes to London's attractiveness as a place to be, and the visitor assets and services provided by the City of London Corporation – whether within or beyond the City itself – are recognised and valued by all as helping to deliver sustainable growth and jobs for London's visitor sector, as well as helping to boost the UK's financial recovery.

From this vision, we have developed **five over-lapping strategic aims**:

SA1. PRODUCT DEVELOPMENT
To develop and maintain **a compelling offer for all our visitors**, celebrating the City's unique heritage and cultural output, especially through the delivery of the City's Visitor Trail, its Cultural Hub and its art-on-street initiatives

SA2. MARKETING
To vigorously **promote the City as a world-class, must-see destination** to all potential audience groups, focussing on those of the highest economic or strategic value to the City and the City Corporation

SA3. EXPERIENCE
To **deliver enhancements to the City's physical environment** that are of mutual benefit to all of our communities so ensuring harmony, and to **develop the City's welcome** for visitor audience groups, be they tourists, business travellers, or workers and residents in pursuit of leisure

SA4. SUPPORT
To **provide valued services to our City stakeholders, neighbours, London and the nation** in the field of tourism and to maximise on the opportunities to play our part in local, London-wide, national and international celebrations and events

SA5. RECOGNITION
To **derive recognition for the City Corporation** in the execution of its visitor services activities and to tell the story of the City Corporation through its assets, both within and outside of the City, promoting the connectivity between these as appropriate

Spanning all strategic aims is a series of **cross-cutting themes**:

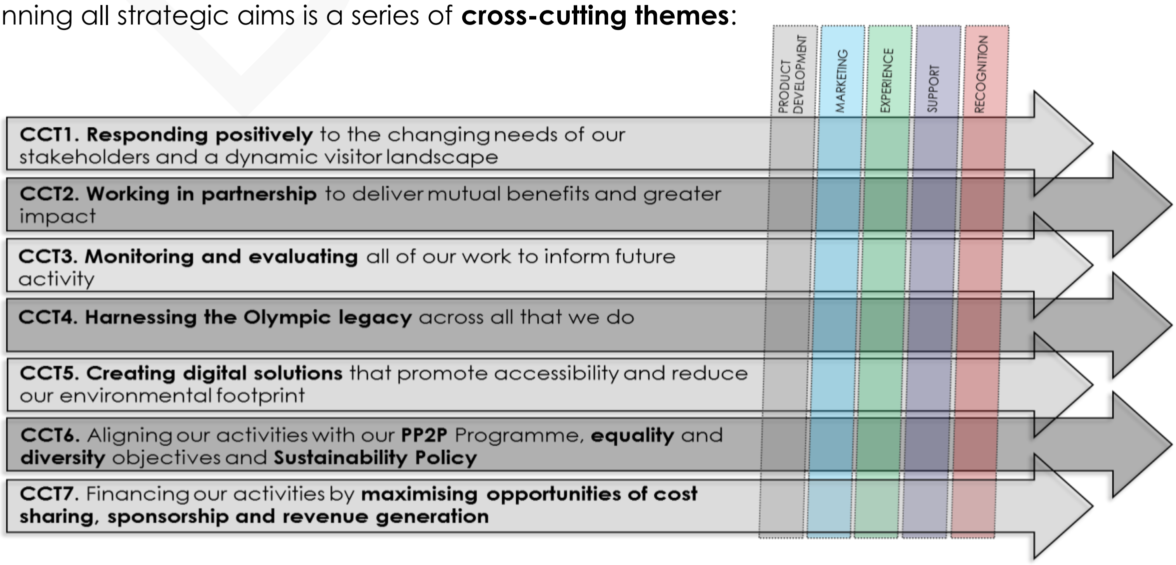

Fig. 7: cross-cutting themes

Key priorities (2013-17)

A series of key priorities (KPs) has been developed under each strategic aim. These KPs will be the focus of all our work for the period 2013-17 and inform our action plan, with each action being tested against them and the cross-cutting themes on the previous page.

KEY PRIORITIES

SA1. PRODUCT DEVELOPMENT: to develop a compelling offer for our visitors

KP1.1 To identify and respond to opportunities that will **enhance, animate and promote the City's public spaces and buildings** for the enjoyment of all City communities

KP1.2 To **enhance the appeal of the City Corporation's own attractions** through the introduction of new visitor activities and experiences that incite audiences to re-visit

KP1.3 To **develop and promote itineraries and clusters that help to "package" the City's visitor offer** for our target audience groups and which raise our profile specifically in the areas of heritage, architecture and culture

KP1.4 On an annual basis**, to identify a key City theme that will engage local London audiences**; to produce a high-profile public event and/or campaign in support of it

SA2. MARKETING: to promote the City as a world-class, must-see destination

KP2.1 To **tailor activity and campaigns to target specific audience groups that will grow the City's visitor footfall, increase dwell-time and deliver greater revenues** for the City's visitor services, cultural, retail, hotels and hospitality sectors

KP2.2 To **increase access opportunities** to the City's assets for all visitors, with a particular focus on our neighbouring communities and London more generally, demystifying perceived barriers, especially in relation to cost and physical ability

KP2.3 To **focus our local resources on targeting visitors already in London**, especially at visitor hubs close to the City such as the South Bank, and to identify, secure and develop long-term strategic partnerships that will enable the promotion of the City nationally and overseas

KP2.4 To **engage and cultivate the City's visitor community and to develop new audiences through the use of social media** and other digital broadcast mechanisms, reducing a reliance on print and delivering cost savings and a greener footprint for the City Corporation

KP2.5 To **push City visitor content to the media** and to commercial travel and visitor publications, apps and websites; to **monitor and positively respond to user-generated content**

KP2.6 To **promote City clusters, characteristics and sights over the geographic City**, acknowledging that visitors are uninterested in jurisdictive boundaries and to explore options for cross-promotions in support of this

SA3. EXPERIENCE: to enhance the physical environment and visitor welcome

KP3.1 To **deliver consistent and improved City Corporation signage and mapping** so to aid navigation and drive footfall; and to lobby for improvements to signage within non-Corporation-owned sites to achieve the same (eg stations)

KP3.2 To **deliver improvements to the City's public realm** to create a more visitor-friendly environment, advancing the City Corporation's retail[14] and public convenience strategies as part of this work; to **facilitate animations and activities** within these areas as appropriate

[14] As contained within the City Corporation's Local Plan

KP3.3 To **deliver a free visitor information service at places where visitors congregate** (both within and beyond the City) in order to improve the visitor experience, increase dwell time and drive footfall and revenue for City stakeholders

KP3.4 To **promote the City Information Centre as a vital, free and accessible resource** for all visitors to London and England and to improve service standards and facilities for the benefit of all users

KP3.5 To **develop our suite of free visitor information materials** and to promote these at City Corporation assets, and the attractions, shops and hotels managed by our partners, for the benefit of all visitors

SA4. SUPPORT: to provide valued services to our stakeholders, London and the nation

KP4.1 To **retain and build the existing visitor service provider groups** facilitated by the City and to establish new ones where these will add value, providing a voice within the City Corporation for members and identifying opportunities for partnership activity that will deliver greater collective impact and cost savings for all; to strengthen links between these groups and the City's service providers including the City Police, Open Spaces, Traffic Management and Cleansing teams so to ensure a co-ordinated approach

KP4.2 To **develop our data collection systems** to build a fuller picture of City visitor activity, delivering both quantitative and qualitative intelligence that will support the business decisions of our stakeholders, inform City visitor strategy development and help us to play a more valuable role in London and national membership programmes

KP4.3 To **establish new revenue generation schemes and to secure external sponsorship and in-kind support** to fund "extraordinary" activities and campaigns that are beyond the purse of the City Corporation's local visitor development budget, to the benefit of our stakeholders and partners

KP4.4 To **promote our assets and expertise in the field of London visitor information** and to use this to provide valued services for London and national visitor-led projects and programmes

KP4.5 To **offer appropriate support to partner and stakeholder events, campaigns, programmes and celebrations** so ensuring City and City Corporation inclusion and profile

SA5. RECOGNITION: to derive recognition for the City Corporation

KP5.1 To **develop a voice for the City Corporation** and its visitor community at a London and national level through appropriate City Corporation Members and officers, ensuring the City visitor story is heard and its interests in the context of tourism are represented

KP5.2 To **deliberately promote City Corporation visitor assets and services to the film and television industry** and to ensure recognition within outputs, using the opportunities afforded to describe the City Corporation's remit in its widest context

KP5.3 To **tell the story of City government, and the importance and extent of its role both historically and within a contemporary context**, at City Corporation visitor assets and through their outputs, both individually and by collective marketing

KP5.4 To **identify projects with a common purpose for City Corporation assets and** to **foster joint working and sharing of costs in order** to deliver greater impact for the City Corporation as a whole, as well as for participating assets

KP5.5 To **establish links between the City and the City Corporation's outlying sites**, such as its open spaces, and to promote these in order to drive two-way visitor traffic and promote the City's wider role

Whatever the task in hand, we will execute actions according to our mantra:

OUR MANTRA
To be user-focussed, not product driven, considering the needs of those we serve and the consequences of our actions in all that we do

SA1 PRODUCT DEVELOPMENT

The Association of Leading Visitor Attractions (ALVA)[15] suggests that there are four main areas of product development that are likely to pay dividends with visitors. **The message is "refresh, refresh, refresh"** and so entice audiences to a destination or asset with a new and dynamic experience, reinventing product to incite repeat trips – that can mean a changing programme of events, asset refurbishments or enhancements to the offer. In addition, **an authentic sense of place,** where packages and itineraries that put the visitor "on the spot" where something has happened or someone has lived are key, as is **the telling of people's stories over those of drier buildings and places**, giving the product life. These are the three pillars of this strategic aim.

HEADLINE ACTIONS *(for glossary of acronyms, see p25)*:

ACTION	Lead Dep't	External partners	Date
A1.1: to secure City involvement in **pan-London and national initiatives** that deliver on-street entertainment at visitor hubs; specifically, to build on the success of last year's GLA *Gigs: Big Busk* and to play a part in *Ride London* and the Tour de France (2014)	CHL, DBE, PRO	CoLP, GLA, TfL, others TBI	2013/17
A1.2: to secure commercial sponsorship so that **major artworks** can continue to be used to enliven the City's streets; specifically to produce a changing programme of exhibits for ***Sculpture in the City*** and – through the City Arts Initiative – to positively encourage applications from external agencies for programmes that add value to the on-street experience	DBE, CHL	TBI	2013/17
A1.3: to build on the **Guildhall Area Strategy**, delivering ideas for animations within the Guildhall Yard that will provide incentive for a regular presence of workers and visitors; to ensure the use of Guildhall Yard within major, one-off City events so developing its publics	DBE, REM, CHL, CS	TBI	2013/17
A1.4: to progress the City's Various Powers Bill to enable the granting of **on-street trading** licences and to complement special events with market activity in order to drive footfall	REM, DBE, CHL	-	2014/15
A1.5: to develop a **Cultural Hub** across the Barbican, Museum of London, Guildhall School and Milton Court campuses to promote the City's cultural pre-eminence, animating this area to drive footfall and enhance the visitor experience	BC, GS, CHL	MoL	2013/17
A1.6: to create a **business hospitality event space** in the lower galleries at Guildhall Art Gallery and in the Roman Amphitheatre, so building the City's portfolio of unusual venues and generating revenue to support activity	CHL, REM	-	2013/14
A1.7: to advance plans for a new **Heritage Gallery** in Guildhall Art Gallery to showcase the City's (and London's) treasures and heritage; to install **glass walkways at Tower Bridge** and to develop our **Great Fire** and **Roman London** offer through the delivery of self-guided walks and itineraries	CHL	MC800	2015
A1.8: to develop a **City Visitor Trail**, promoting the proximity of City attractions to increase dwell-time and footfall, and to encourage walking between City sites; to ensure the City's smaller attractions are referenced and promoted as part of this and **to deliver an on-street element** place-marking historic events and exposing City "secrets"	CHL, DBE	DoL, City partners	2013
A1.9: to develop **itineraries to target specialist audiences such as families, groups, those with access difficulties and specialist interest groups** (eg architecture) at times when the City is less busy, especially weekends	CHL	AHL, RNIB, L&P, VE, VB, City partners	2013/17
A1.10: to develop an annual "**A day at Guildhall**" to showcase the City Corporation's offer and tell its story, using Guildhall Yard as the focus	CHL, REM	L&P, VE, VB	2014/17
A1.11: to programme a series of **annual events focussing on City history or people**, so engaging visitors with the City's unique heritage, to include anniversaries of the last Thames Frost Fair (2014, 200 years), the death of Mrs Beeton (2015, 150 years); and the Great Fire (2016, 350 years)	CHL	TBI	2013/17

[15] Presentation by Bernard Donoghue, Director of ALVA, *Prospects 2013*, hosted by the Tourism Society on 13 January 2013

SA2 MARKETING

Marketing tactics can be loosely divided into **two categories, those that "pull" visitors and those through which the product is "pushed"**. In the past, our focus has largely been on those that pull; producing campaigns and promotions and, through them, attracting our target markets. "Push" tactics involve "selling" to third parties, so they, in turn, push them to the visitor.

The limited resources with which the City's visitor development team is able to promote the City and the high volume of day visitors the City receives means that **we focus activity on delivering campaigns that target those already *in* London**, pulling visitors from London hotels for example, to the City. **This ignores domestic and overseas audiences when they are at home** and for whom we want the City to be an integral part of their plans pre-arrival, as well as **the selling of the City as an essential part of an integrated London offer**, so adding value and attracting visitors to London in the first place.

The actions under this aim focus on **building our pull tactics**, **while introducing some push mechanisms** through which we can increase our profile in overseas and national markets.

HEADLINE ACTIONS *(for glossary of acronyms, see p25)*:

ACTION	Lead Dep't	External partners	Date
A2.1: to **develop partnerships with strategic and commercial bodies and overseas tour operators** to ensure the City is promoted within campaigns, at trade shows, through fam trips and to our international target markets	CHL	L&P, VE, VB, UKI, BHC	2013/17
A2.2: to deliver focussed **press campaigns to engage the domestic market** through the commission of a travel press agency; specifically, to target local Londoners for weekend activities and high-value markets (eg LGBT)	CHL	-	2013/17
A2.3: to deliver **co-promotions with transport operators** and stations serving the City to drive audiences, pushing times when capacity is under-used	CHL	TfL, ATOC, and TBI	2014/17
A2.4: to develop **an identity for/with the City's event venues**; to promote this to them for use in their materials, so articulating the City's USPs in this market	CHL	City venues	2014/15
A2.5: working in partnership, to develop a series of campaigns and initiatives that highlight **the City's convenience in terms of access (wheelchair users), shopping options and low-cost activities** to local Londoners, especially at weekends	CHL	FHA, VB, City retail	2014/17
A2.6: to introduce a **City attraction "twinning" project** that matches City attractions with those in wider London that are of a comparative size and offer and to drive traffic between them through cross-referencing; to ensure a City presence (print) at central London attractions and hotels	CHL	TBI	2014/17
A2.7: to develop the **City's social media presence**, growing fan bases and fostering discussion through blogging sites; to launch a **Pinterest** presence	CHL	-	2013/17
A2.8: to explore options for generating **City visitor content on foreign-language Wikipedia sites**, so raising the City's profile internationally and creating an essential reference for non-English speaking visitors	CHL	Wiki	2014/15
A2.9: to **develop the audio guide element (app) of the City Visitor Trail** to tell the City's story through City people	CHL	City partners	2013/14
A2.10: to **produce a series of films across a selection of languages** that promote specific aspects of the City (eg architecture) and, utilising the part-payment schemes promoted by Visit Britain TV, to use these to build the City's online presence, especially on **YouTube**	CHL, OS	VB	2013/14
A2.11: to target **London visitor apps** and ensure a positive City presence and to **solicit user-generated content** on travel sites such as Trip advisor	CHL	-	2013/14
A2.12: to launch a **regular "3-shot eshot" targeting the travel press**, describing new developments to our offer and upcoming events	CHL	-	2013/17
A2.13: to deliver a number of **thematic campaigns focussed on City strengths**, to include "Pageantry and Pubs", the City's music offer and City churches; through this, to explore options for cross promotions that will support strengths such as a City arts card or other discount scheme and to consider how strengths may be developed to create City visitor identity	CHL, BC, GS	Retail, CoLF, LSO, DoL	2014/17

SA3 EXPERIENCE

Word-of-mouth is the most effective tool in generating footfall. **We want visitors to come here and to have the best experience possible**. Then **we want them to sing about it**, inciting others to visit too. We also want them to come again, to explore further and to enjoy once more the great hospitality, services and environment the City has to offer.

Concentrating specifically on areas where this strategy can have influence, we will focus our resources on delivering a **great welcome through our staff**, provide **pre-arrival and on-the-spot visitor information** signposted from interfaces that visitors are likely to use, promote **mapping that is consistent** and easy to follow, ensure **a clean and attractive environment for all** to enjoy, and provide the opportunity for visitors to **share their experiences with us and others**. This will help to deliver a stimulating and highly-satisfying experience for all those we welcome and, noting the plaudits London and the UK received for the strength and warmth of its visitor reception over the Games-time period, will **build on the Olympic legacy**.

HEADLINE ACTIONS *(for glossary of acronyms, see p25)*:

ACTION	Lead Dep't	External partners	Date
A3.1: to deliver **consistent mapping across all visitor interfaces**, so aiding navigation; and to facilitate **interactive mapping on our website,** enabling users to retrieve the detail they need	CHL, DBE	-	2013/14
A3.2: in recognition of public conveniences being an essential element to an enjoyable visitor experience, **to promote the City's community toilet scheme** to visitors; to **combat antisocial street fouling**; and to support the provisions laid out in the City Corporation's **Public Conveniences Review**	DBE, CHL	-	2013/14
A3.3: to work with transport providers (eg Crossrail) and local LBs to ensure **City product is accurately referenced on signage**; to investigate options for **City product to be featured in transport announcements** ("alight here for…")	CHL, DBE	TfL, LBs, Crossrail	2014/17
A3.4: to implement **area enhancement strategies for the street environment** at Bank, Fenchurch Street and Monument, Liverpool Street, West Smithfield and Barbican; **to develop the retail offer in the City's PSCs** as proposed in our Local Plan**, enhancing the connecting "retail links"**	DBE	-	2013
A3.5: aligned with City advertising policies, to work with developers to establish **information boards at building sites describing the project and nearby leisure options**; working in partnership, to deliver **a "Future City" walk** to explain these sites, so countering negativity about disruptions	CHL, CS, DBE	OC, CG	2014/15
A3.6: to explore **solutions for the build-up of rubbish** at visitor hubs at the weekend as requested by VARG and the CHF	DBE, CHL	-	2013
A3.7: to deliver a **mobile visitor information van staffed by the CIC** for use at events in the City, at places where it is most busy and in our open spaces beyond the City, providing on-the-spot help when and where it is needed	CHL	GLA	2013/17
A3.8: to deliver the **City Street Guides scheme** in support of major City events and to extend membership to non-City-Corporation-employees	CHL	-	2013/17
A3.9: to provide a leisure **advice service for event planners and City businesses planning staff trips**; to complement this with a concierge service for business events (to be delivered by the CIC on a cost-recovery basis)	CHL	-	2014/15
A3.10: to **audit guidebooks and travel websites** on a global level, to correct misinformation about the Britain London Visitor Centre (now closed) and promote our own information services	CHL	-	2013
A3.11: to **extend the language skills** (esp. BRIC) and **national product knowledge** of CIC staff to enhance our welcome; to deliver service improvements at the CIC by introducing **WiFi, feedback systems, new products and QR coding** (enabling mobile leaflet download so decreasing environmental impact) and to develop our **partnership with VisitEngland**	CHL	VE	2013/17
A3.12: to print a **guide to the City for workers and event planners**, promoting the leisure offer and financing it through advertising, making this freely available to businesses newly-arrived in the City; to **extend our range of free visitor information** outputs and develop **pre-arrival webpages**.	CHL	-	2014/15

SA4 SUPPORT

The City Corporation it is a **provider of valued services to the City, London and the nation**. These include its green spaces outside of the City's boundaries for example, which are maintained for the enjoyment of all at no expense to the taxpayer. **What is provided must be well chosen**, especially in an austere climate where budgetary considerations ever more confine us. At its most basic, we need to achieve **advantage, and that advantage should reflect the level of the investment**. In the visitor context, that equates to deriving benefit for our stakeholders, the City visitor economy and/or the City Corporation in the realisation of its ambitions.

A return on our investment could be that we are meeting our obligations as a provider of local government services but ordinarily, it is likely that we would build on that. **Facilitating stakeholder networks** for example, not only helps to represent their needs to us as a collective body, but also enables us to **secure distribution channels** for collateral. On a more macro scale, contributing our expertise to the volunteer training programmes of the GLA, helps us to **promote the City** and to ensure our sites are considered in the dialogue between ambassadors and visitors across London, so **driving footfall.** All actions under this strategic aim consider this one criterion, measuring level of effort or resources against potential return.

HEADLINE ACTIONS *(for glossary of acronyms, see p25)*:

ACTION	Lead Dep't	External partners	Date
A4.1: to **establish a City Hotels Forum** and to **extend membership of the City's VARG** ensuring networking opportunities between groups; to facilitate a ***LinkedIn* group** for member debate and to facilitate shared-cost City **representation at industry events** on behalf of all	CHL	City partners	2013/17
A4.2: to develop a **"crowd-funding" portal** for shared-cost projects through which City stakeholders can pledge support commensurate with the proposal's ability to deliver on their own business objectives	CHL; CHAM	City partners	2014/15
A4.3: to establish **qualitative data reporting systems** and to share results with our stakeholders while informing our own business planning; to establish an **annual retail spend survey** and enable City benchmarking	CHL	City partners	2014/15
A4.4: to explore options for delivering a **research report looking at the impact of the business meeting and events industry in the City**, so positioning the City as a leader in this field and achieving profile	CHL; TC; REM	City partners	2014/15
A4.5: to launch an **online visitor shop** with white-labelling to booking sites, enabling pre-arrival and post-trip sales that will help fund visitor activity	CHL; CHAM	TBI	2014/15
A4.6: to identify **London and regional tourism funding streams** (eg RGF) and secure benefits for collective City endeavour; to build on the **media partnerships** established for *Celebrate!* to deliver greater in-kind support	CHL	VE, ACE and TBI	2013/17
A4.7: to create an **internship programme at the CIC** targeting London universities in order to derive profile and recognition for the City in the field of visitor information, positioning the CIC at the forefront of the minds of tomorrow's tourism specialists and enhancing job prospects of participants; to deliver **a national TIC exchange programme in partnership with VE** and to exploit opportunities to **develop our training programmes in the visitor sector for young people in the City Fringe**	CHL	London HEIs, VE	2014/15
A4.8: to **train the trainers of the GLA Ambassador Programme 2013** in London product knowledge, pushing City product and thus driving footfall	CHL	GLA	2013
A4.9: working in partnership, to deliver **free day-trips for disadvantaged families from east London**, generating WOM recommendations while deriving profile for the City Corporation as an early adopter of the scheme	CHL	VE, FHA	2013/17
A4.10: to explore options for delivering **training in London product to London cabbies** through familiarisation trips and bespoke sessions	CHL	LTDA; TfL	2014/17
A4.11: to provide a **free marketing advice service** and deliver marketing support for events that involve multiple City partners, eg Huguenots Festival	CHL	TBI	2013/17
A4.12: to **support London and national programmes and events** where there is a City presence, driving footfall and delivering complementary activity to incite revisits; specifically, to provide the secretariat and meeting venues for the **Magna Carta 800 Tourism Sub-Committee**	CHL; PRO; DBE; REM	CoLP	2013/17

SA5 RECOGNITION

The guiding principle for the actions developed under this strategic aim is simple: **the City Corporation interfaces with the visitor community and the national tourism industry at key touch points.** Our job therefore, is to derive recognition and credit at the point where we interact, telling the City Corporation story as effectively as we can and building our presence where there is scope to do so.

Promotion at touch points may be passive or active, where passive is the telling of our story without the ability to enforce its reception (such as describing our role and remit in visitor outputs which the visitor may read or not); and active where we are able to influence reception through direct dialogue with our audiences (such as staff recommending activities to visitors or through developing our voice on issues of concern for the UK tourism industry).

The actions developed under this strategic aim, identify these touch points and use a mix of passive and active mechanisms to deliver recognition.

HEADLINE ACTIONS *(for glossary of acronyms, see p25)*:

ACTION	Lead Dep't	External partners	Date
A5.1: to **develop a City tourism intelligence resource on the City Corporation's intranet** for use by Members and officers when representing City or City Corporation interests in meetings, at events and on overseas trips; **to promote Members and senior officers as representatives of London's tourism industry** to the sector	CHL	-	2013/17
A5.2: to ensure the City Corporation's contribution to visitor services is represented within its **staff induction programme** fostering ownership and knowledge for staff as ambassadors	CHL, PRO, TC	-	2013/17
A5.3: to facilitate **a new cross-borough visitor services group with membership** comprising relevant representatives from all central London Boroughs and relevant BIDs; through our CIC, to lead facilitation of the **London Tourist Information Centre Network** established by the GLA in 2012	CHL	-	2014/17
A5.4: to **pitch City Corporation assets to the TV industry**, especially programmes focussing on travel or heritage, and to derive City Corporation credit in outputs	CHL, PRO	TBI	2013/17
A5.5: to **promote the City as a film location** and to streamline processes to enable greater adoption; to examine opportunities for **promotions with producers of the DVDs** of films in which the City has a significant presence	PRO, CHL	-	2013/17
A5.6: to develop **a City Corporation day for visitors**, securing free admission to our attractions and delivering tours that celebrate our contribution in the visitor context; to promote this to London audiences specifically	CHL, REM	-	2014/17
A5.7: to develop a down-loadable, self-guided **Guildhall Great Hall tour for mobile devices**, promoting it as the seat of City government to the many visitors who come here without having booked on the monthly guided tour	CHL, REM, CS	-	2014
A5.8: to identify locations within City Corporation assets where **a board describing the asset and the City Corporation's contributions** in the visitor/cultural context can be housed; to deliver **a moveable display** about our contribution for use at City Corporation events	CHL, REM	-	2014/15
A5.9: to deliver **a City Corporation treasure of the month promotion** on the City Corporation's website and to excite interest via social media channels	CHL	-	2014/17
A5.10: to create a **City of London Attractions group** comprising City Corporation visitor assets to qualify to join the Association of Leading Visitor Attractions (ALVA) and build exposure; similarly, to develop the **City Corporation Venues group** and investigate joint promotional opportunities	CHL, REM, BC	MoL	2013/17
A5.11: to establish **links between the City Corporation's assets outside of the City and the City's visitor offer**, driving footfall in both directions; specifically, to deliver promotions linking Hampstead Heath and Epping Forest to the City	CHL, OS	VB, CC	2014/17

i. Key achievements 2011-12

What we've been up to over the last two years

RESEARCH:

- the City's **Visitor Attractions Monitor** (footfall to City attractions)
- **Value and volume of tourism to the City** (RJS Associates)
- **perception testing** amongst Londoners (Arkenford)
- **user surveys** for *Celebrate the City!* and the City Information Centre (RJS Associates)

PUBLICATIONS:

- *The City of London, Architectural Tradition & Innovation in the Square Mile* and its "companion" guide, published by **Thames and Hudson**
- The **2010 and 2012 *Time Out* Guides to the City of London**
- The **City's 2012 Games-time map**
- **Four seasonal what's on guides** a year highlighting headline events

EVENTS:

- Visitor and support services for the **Queen's Diamond Jubilee Weekend**
- Visitor and support services for the **Games-time road events including the Marathons, Athletes Parade and Torch Relay**
- Delivery of ***Celebrate the City: four days in the Square Mile*** – a programme of bespoke events and special activities presented by City partners in 2012
- Facilitation of the GLA's ***Gigs: Big Busk*** programme – on-street musical entertainment at six City sites to entertain visitors over Games-time
- Working with London Marathon Limited (LML), delivery of **musical entertainment at the Olympic and Paralympic marathons** as well as **full peals of bells from six City churches** adding a sense of occasion to these events

OUR GAMES-TIME WELCOME:

- Delivery of a staff "volunteering" scheme which saw employees deployed on-street as **2012 Street Guides**
- Design and delivery of bespoke local knowledge **training for GLA Ambassadors** working across the City area during Games-time
- Provision of visitor advice for the International Paralympic Committee (IPC) and delivery of **a welcome pack for delegates**; in partnership with the Cheapside Initiative

CITY INFORMATION CENTRE:

- **A partnership with VisitEngland (VE)**, endorsing the Centre as the only official TIC in central London and the official London centre for VE

WEBSITE AND SOCIAL MEDIA:

- City visitor presence launched on **Facebook**, **Twitter and Flickr**
- **Migration of the City's visitor website to the new City Corporation site**
- Access information for attractions and other assets and foreign language welcome pages delivered as part of the above
- Launch of *Enjoy Your City* – a City event **App** targeting City workers
- **Delivery of short films** including six language versions of a promotional film for the City Information Centre, two films for *Celebrate the City!* and a film created for training purposes which summarises the City's visitor offer; all films have been uploaded to the City's **YouTube** channel

TRAVEL TRADE:

- Delivery of a **City of London collective presence** at travel trade shows such as Excursions, with costs shared between participating attractions

ii. What the City offers

The scope of our product

The City has three well-recognised "products" to offer its visitors: business excellence, history and heritage and the modern dynamism of its culture and leisure facilities – all share in the same level of richness and vibrancy.

BUSINESS EXCELLENCE:

- world-class financial facilities
- business critical mass
- unique venues for meetings, conferences and seminars
- individual business activity
- hospitality, formal and informal

HISTORY AND HERITAGE:

- City ceremonial
- attractions
- museums and permanent art collections
- libraries and archives
- London artefacts and treasures
- archaeology
- architecture, monuments and churches
- built environment
- Roman London
- a 2,000-year existence

21ST CENTURY CITY:

- theatre and cinema
- arts and music (particularly classical)
- education and learning (schools, academies, conservatoire, outreach)
- festivals
- guided walks
- bars and restaurants
- high-street and high-end retail
- open spaces
- street scene developments
- cutting-edge public art
- high-quality, innovative architecture
- accommodation, high-end and budget
- resident, worker and visitor diversity

iii. Consultation

Who we've talked to

This strategy has been written and developed to reflect discussions and ideas solicited in consultations and meetings with our elected Members, City Corporation officers and external stakeholders. Those consulted include:

CITY CORPORATION:

- Members
- Assistant Town Clerk

Chief Officers from the departments of:
- Barbican Centre
- Built Environment
- Culture, Heritage and Libraries
- Guildhall School of Music & Drama
- Open Spaces
- Public Relations

Officers representing:
- Barbican Centre
- City Business Library
- City Gardens
- City Information Centre
- Film Team
- Guildhall Area Strategy Team
- Guildhall Art Gallery
- Museum of London
- Planners
- Remembrancer events team
- Significant External Events Group
- Street Scene Team
- Streets and Walkways Team
- Tower Bridge / Monument Marketing Team
- Visitor Development Team

Strategies, plans and research including:
- City of London Corporate Plan 2012-16
- *Business with Pleasure*; the Importance and Leisure Potential of Independent Business Visitors to London
- City of London Communications Strategy, 2012-15
- City of London Cultural Strategy, 2012-17
- City of London, Draft Local Plan, 2013
- City of London, Public Conveniences Review
- Development Schedules: Survey Statistical Report Hotels, April 2012
- Guildhall Area Strategy (*The Hidden Heart of London*), 2011
- *The City Together*: The Heart of a World Class City, 2008-14
- The City's Visitor Attraction's Monitor
- The Economic, Social and Cultural Impact of the City Arts and Culture Cluster
- Other reports and documents as cited

CITY STAKEHOLDERS:

- City Visitor Attractions and Retail Group (VARG)
- City Hotels Forum (CHF)

EXTERNAL AGENCIES AND CONSULTANTS INFORMING THE STRATEGY:

- ALVA
- Britain's Heritage Cities (BHC)
- China Holidays
- Greater London Authority (GLA)
- Lacuna PR
- London & Partners
- Magna Carta 800 Tourism Sub
- Team Tourism
- The City Selection
- UKinbound
- Visit Britain TV
- VisitEngland

External strategies, plans and research:
- DCMS: Beyond 2012, the London 2012 Legacy Story
- DCMS: Government Tourism Policy, 2011
- GLA Economics: The Great Britain Day Visitor Survey 2011 – London Analysis
- Mastercard Global Destination Cities Index
- The GB Tourist: Statistics 2011
- Tourism Alliance: UK Tourism Statistics 2012
- Visit Britain: Delivering a Golden Legacy, 2012-20
- Visit Britain: Market and Trade Profiles (esp. the BRIC countries)
- VisitEngland: A Strategic Framework for Tourism 2010-2020
- VisitEngland: The all-England Destination Marketing Strategy
- VisitEngland: The Digital Landscape and the Role of Social Media for the Domestic Visitor
- Other reports and documents as cited

iv. Partners in tourism

Those with whom we'll deliver this strategy

This strategy must be a partnership. It will need to be implemented in wide consultation with many organisations and individuals in the City and throughout London and it can only be successful if it is delivered by working with them. External partners include:

THE CITY'S ARTS PROVIDERS:

Barbican associate and resident companies, orchestras and producers, including

- Academy of Ancient Music
- BBC Symphony Orchestra
- Boy Blue Entertainment
- Britten Sinfonia
- Cheek By Jowl
- Deborah Warner
- Gewandhaus Orchestra Leipzig
- Jazz at Lincoln Center
- London Symphony Orchestra
- Los Angeles Philharmonic
- Michael Clark Dance Company
- New York Philharmonic
- Royal Concertgebouw Orchestra of Amsterdam
- Serious

Other City arts providers

- Bishopsgate Institute
- Bridewell Theatre, and residents:
  - Cantibile: the London Quartet
  - SEDOS (Stock Exchange Drama and Operatic Society)
- City Music Society
- City of London Festival
- City of London Sinfonia
- Goldsmiths' Hall
- London Festival of Architecture
- LSO St Luke's
- Open-City
- Spitalfields Music
- Temple Music
- Vital Arts

THE CITY'S VISITOR ATTRACTIONS AND SERVICES:

- Bank of England Museum
- City churches
- City of London Police Museum
- Dr Johnson's House
- Livery halls
- Middle Temple Hall
- Museum of London
- Open Garden Squares Weekend
- St Bart's Hospital Archives and Museum
- St Paul's Cathedral
- The City of London Guide Lecturers Association (CLGLA)
- Tower of London

THE CITY'S HOTELS:

- Andaz
- Apex (City / London Wall / Temple Court)
- Chamberlain
- Club Quarters (St Paul's / Gracechurch Street)
- Crown Plaza – the City
- Double Tree by Hilton
- Grange (City / St Paul's)
- Hotel Indigo
- Montcalm at the Brewery, London City
- Novotel Tower
- Premier Inn (Blackfriars / St Mary at Hill)
- Threadneedles
- Travel Lodge (Liverpool Street / Bank / Tower)
- Landmark Trust (43 and 45a Cloth Fair)
- The City's serviced apartments

THE CITY'S CONFERENCE AND BUSINESS EVENT VENUES:

- The City's Livery Halls
- The City Selection
- The City Collection
- The City's Hotels, as listed above

CITY TRADER ASSOCIATIONS AND ESTATE MANAGERS:

- Bishops Square Traders
- Bow Lane Traders
- Broadgate Estates (Broadgate Arena)
- Broadgate Estates (Paternoster)
- Cheapside Initiative
- Land Securities (One New Change / New Street Square)
- Leadenhall and Smithfield Traders
- London Silver Vaults
- Old Spitalfields Market
- Petticoat Lane Market
- Royal Exchange

THE CITY TOGETHER

LOCAL BIDs AND GROUPS:
- Better Bankside
- In Midtown
- South Bank Employers' Group
- Team London Bridge
- Waterloo Quarter

NEIGHBOURING BOROUGHS:
- LB Camden
- LB Hackney
- LB Islington
- LB Lambeth
- LB Southwark
- LB Tower Hamlets
- LB Westminster

LONDON AND NATIONAL PARTNERS:
- Association of Leading Visitor Attractions (ALVA)
- Britain's Heritage Cities (BHC)
- Central London Forward
- DCMS
- Family Holiday Association (FHA)
- Greater London Authority (GLA)
- London & Partners
- London Councils
- London First
- London Tourist Information Centres
- The Tourism Alliance
- Transport for London (TfL)
- UKinbound
- Visit Britain
- VisitEngland

The City's visitor strategy will also be an internal partnership and we must ensure that the activities of our own departments and funded organisations are coordinated to maximise their impact. A list of City Corporation assets and services can be found on p4.

*****

v. Glossary

What the acronyms mean

Dep'ts

BC	Barbican Centre
CHAM	Chamberlain's Department
CHL	Department of Culture, Heritage and Libraries
CS	City Surveyor
DBE	Department of the Built Environment
GS	Guildhall School of Music & Drama
OS	Open Spaces Department
PRO	Public Relations Office
REM	Remembrancer
TC	Town Clerk's Department

External partners

ACE	Arts Council of England
AHL	Action on Hearing Loss
ALVA	Association of Leading Visitor Attractions
ATOC	Association of Train Operating Companies
BHC	Britain's Heritage Cities
CC	CurioCity
City partners	All City visitor services and culture providers
CG	City of London Guide Lecturers Association
CoLF	City of London Festival
CoLP	City of London Police
DoL	Diocese of London
FHA	Family Holiday Association
GLA	Greater London Authority
LBs	London Boroughs
L&P	London & Partners
London HEIs	Higher education institutions in London
LSO	London Symphony Orchestra
LTDA	Licensed Taxi Drivers Association
MC	Magna Carta 800
MoL	Museum of London
OC	Open City
RNIB	Royal National Institute for Blind People
TfL	Transport for London
UKI	UKInbound
VB	Visit Britain
VE	Visit England
TBI	To be identified

Other

BID	Business Improvement District
CHF	City Hotels Forum
CIC	City Information Centre
Fam trips	Familiarisation trips
LGBT	Lesbian, Gay, Bisexual and Transgender
PSC	Principal Shopping Centre
RGF	Regional Growth Fund
VARG	Visitor Attractions and Retail Group
VAM	Visitor Attractions Monitor
WOM	Word of mouth