

A TOURISM VISION FOR LONDON



LONDON®
& PARTNERS



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Trafalgar Square

FOREWORD

London & Partners is the Mayor of London's official promotional agency.

We exist to help London and Londoners to benefit from the global economy. We promote London internationally to generate growth that supports the Mayor's vision of a city for all Londoners.

We do this by:

- building London's international reputation
- attracting international audiences and convincing them to choose London
- guiding international audiences to make the most of all that London has to offer, and helping Londoners to make the most of international promotion

We tell London's story brilliantly as the best place in the world to visit, work, invest, trade and study. We do this in partnership with organisations and people who have a stake in London's international promotion.

londonandpartners.com

London has attracted record-breaking numbers of visitors since hosting the Olympic and Paralympic Games in 2012. They come to experience London's outstanding cultural offering, our history and heritage, world-class museums, architecture, nightlife, parks and waterways. But increasingly they come to explore what it is to be a Londoner, to find London's hidden gems, to explore our varied and unique neighbourhoods, and to experience our distinctive and diverse retail and food offering.

Most visitors, whether they come for business or pleasure, from the rest of the UK or from around the world, leave enriched and changed by the experience and will return time and again. They also help make London the city it is today – an open, welcoming and diverse capital of culture, entertainment and sport.

The benefit visitors bring to the city is huge – around one in one in seven of London's workforce are employed directly or indirectly by the tourism sector. And this is an industry that provides opportunities to people at every stage of a career, from entry-level jobs to senior management. Our visitors also spend millions of pounds in our restaurants, venues, hotels, attractions and shops, helping to animate the city and sustain our businesses and cultural institutions.

I am delighted to endorse and support this new vision to progress London's position as a global capital for tourism. It sets out a clear new direction for London's tourism sector, identifying where future growth will come from and the real opportunity we have to harness and manage that growth for the benefit of Londoners and visitors alike.

More than ever it is vital that London remains a safe and secure city and extends a warm welcome to all who want to experience our extraordinary capital. I look forward to working with the tourism industry to bring this vision to life to create more growth and job opportunities for all Londoners.

Sadiq Khan
Mayor of London

CALL TO ACTION

By 2025, London is projected to attract over 40 million overnight visitors a year, 30 per cent more than 2016's 31.2 million overseas and domestic visitors.

But such growth is not a given. Competition is increasing, with other destinations determined to attract new visitors, particularly from emerging markets. There are also significant challenges in areas such as access to talent and aviation capacity that could constrain that growth.

That is why we, as representatives and supporters of London's tourism industry, collectively back this tourism vision. It sets out the opportunity to grow London's tourism economy sustainably and the action required to realise such ambition.

Tourism plays a vital role for London. The sector employs 700,000 people and contributes £36 billion a year to the economy. Tourism also helps to strengthen London's reputation as an open and welcoming global city. Many of the millions who visit each year become advocates of the city, returning time and again as visitors, to attend a conference or to work, invest, trade, live or study.

With over half of all visitors to the UK visiting the capital, London also plays an important role as a UK 'brand leader'. The city acts as a gateway, encouraging visitors to explore more of the country and spreading the economic benefits of tourism.

It is only by the industry working together in partnership with national and local agencies that we will succeed. We look forward to working with London & Partners and the Mayor of London to make this vision a reality.

James McClure
General Manager, Northern Europe
Airbnb

Bernard Donoghue
Chief Executive
Association of Leading Visitor
Attractions

Ufi Ibrahim
Chief Executive
British Hospitality Association

Michael Hirst, OBE
Chairman
Business Visits and Events
Partnership

David Pegler
Chief Executive
ExCeL London

Stewart Wingate
Chief Executive
Gatwick Airport

Stephen Cassidy
Senior Vice President & Managing
Director, UK & Ireland
Hilton

Jasmine Whitbread
Chief Executive
London First

Sandie Dawe CBE
Director
London & Partners

Nick Varney
Chief Executive
Merlin Entertainments

Sharon Ament
Director
Museum of London

Sir Michael Dixon
Director
Natural History Museum

Robin Mortimer
Chief Executive
Port of London Authority

Mike Brown
Commissioner
Transport for London

Sally Balcombe
Chief Executive
VisitBritain



Portobello Road Market



Soho Square



Thames path at Richmond

EXECUTIVE SUMMARY

By 2025, 40.4 million visitors could be injecting £22 billion a year into London's economy – up from 31.2 million visitors spending £14.9 billion in 2016. London & Partners has joined forces with the city's industry leaders to create a vision to achieve this growth.

London & Partners has collaborated with more than 100 of the capital's tourism leaders, including the Greater London Authority, Gatwick Airport, Hilton and the Association of Leading Visitor Attractions (ALVA), to define a new vision for London's tourism industry.

As a combined force, we believe that if this vision is realised, tourism will drive economic growth and stimulate the city's cultural scene, support even greater numbers of jobs and strengthen London's reputation as an open and welcoming city.

London is one of Europe's most popular visitor destinations and the third most visited city in the world¹. Overseas visitor numbers have increased steadily, growing 25 per cent since 2011. In 2016 visitor numbers hit record levels, at 19.1 million overseas arrivals².

However, competition is increasing: cities across the globe have benefited from a parallel surge in visitors, particularly from emerging markets, and London's market share is being eroded.

In addition, London's growing tourism sector is facing challenges such as the UK's departure from the European Union – which is causing uncertainty over recruitment – and capacity constraints, with airport capacity in particular vying to keep pace with visitor demand.

This vision sets out where the industry is today, the opportunity that lies ahead and what needs to be done to capitalise upon it.

Tourism in London today

Tourism plays a vital role in London's economy. The sector employs 700,000 people – one in seven of the capital's jobs – and accounts for 11.6 per cent of the capital's GDP³. It also strengthens London's reputation as an open and welcoming city and is central to the city's soft power. The industry is a key contributor to London's diverse cultural and retail offer as well as the night time economy, and benefits both visitors and Londoners.

The opportunity

Our analysis projects that, in 2025, visits to the capital will reach 40.4 million annually. Some 25.7 million of these will be international visits. But such growth and associated economic benefits will only be realised with a coherent vision and the means of implementation.

How London can get there

Creating a world-class visitor experience will be crucial to growing London's tourist sector. The industry believes this can be achieved through activity in four areas:



Queen's Diamond Jubilee celebration

- 1. Pre-visit promotion:** convincing more visitors to choose London by attracting more first-time visitors; drawing more visitors during off-peak seasons and directing them to locations where London has capacity; showcasing London's cultural offer.
- 2. Visitor experience and information:** providing visitors with information to help them do more and see more in London; improving information to help them find rewarding food experiences and encouraging visitors to explore areas beyond central London and connect with Londoners.
- 3. Infrastructure and amenities:** ensuring London can sustain and accommodate growing numbers of visitors; investing in culture, amenities and digital infrastructure.
- 4. Developing the infrastructure for business visits and events:** strengthening the meetings and events proposition by understanding drivers for growth and reviewing capacity constraints; creating a world-class business visitor experience through greater coordination across the city; addressing regulatory constraints that make London less attractive for delegates.

The vision

Our vision is that visitors will be able to unlock the best version of London for them by tailoring their experience to meet their needs.

They will be provided with better online and offline information to help them navigate the city more effectively and make more informed choices.

They will be encouraged to do more and see more of London, which will step up their overall satisfaction and increase their likelihood of returning as visitors or to work, invest, trade or study.

The tourism industry will work together to manage the expected significant growth in visitor numbers in a sustainable way.

And we will achieve our vision by balancing the needs of Londoners and visitors, with more Londoners recognising the importance of the visitor economy and benefiting from its social and economic impact.

¹ Euromonitor Top 100 City Destinations Ranking 2015 (released 2016)

² International Passenger Survey, Office for National Statistics, 2016

³ Tourism: jobs and growth. The economic contribution of the tourism economy to the UK, Deloitte & Oxford Economics, 2013

OUR APPROACH

This document sets out a vision for London's tourism industry up to 2025. London & Partners has created this vision through bespoke research and demand modelling, together with workshops and consultations with more than 100 tourism industry leaders.

This report explores the potential growth and associated benefits of London's tourism industry. Three factors have shaped our approach:

1. Understanding the size of the opportunity. Estimating whether London can remain one of the world's most visited cities with the capacity to welcome more visitors.

2. Measuring visitor satisfaction. This is a key factor: satisfaction drives advocacy and propensity to return to London to visit, work, live, study or attend an event or conference.

3. Collaborating with industry stakeholders to shape and validate this vision. This is critical as London's tourism economy will only grow sustainably through closer collaboration.





Carnaby street



Carnaby street

The report is structured in the following chapters:

Chapter 3. An analysis of current visitor numbers and satisfaction levels

Chapter 4. An exploration of barriers to growth and how the industry can overcome them

Chapter 5. The size of the opportunity: potential global demand for visitors to London by 2025

Chapter 6. Recommendations on how the industry can strengthen London's offer to meet the needs of visitors today and in the future

Chapter 7. How London & Partners, the Mayor of London's official promotional agency, is already playing a part in putting the vision into action

Sizing the opportunity

Projecting visitor demand is an important part of assessing London's potential capacity needs. We have, therefore, undertaken economic analysis and forecasting to build robust projections for visitor numbers. This is an opportunity for the industry to assess if there is capacity to successfully receive visitors in these numbers.

The model is based on the IMF World Economic Outlook Database (April 2017) GDP projections⁴, which are used as a proxy for international visitors. A range of key industry data and information sources were reviewed during this process. These included projections for inbound visits and arrivals to London, the UK and Europe, such as those from Tourism Economics, the UNWTO long-term forecast to 2030⁵, the World Bank's country level arrivals and departures data⁶.

Note that no expenditure data for 2016 was available for domestic overnight visits at the time of publication. Therefore, total expenditure data referenced throughout the document for 2016 is based on ONS International Passenger Survey (IPS) total spend for 2016, combined with VisitBritain's Great British Tourism Survey (GBTS) data for the previous year – 2015. Volume data given for 2016 is based on 2016 data from each of these sources.

⁴ www.imf.org

⁵ <http://www2.unwto.org>

⁶ <http://data.worldbank.org>

Assessing visitor satisfaction

To better understand the factors affecting visitor satisfaction, London & Partners conducted an in-depth piece of research with over 4,000 visitors to London from 11 markets.

London & Partners' 2016 London Visitor Survey explores the entire customer journey, pinpointing the factors that drive visitors to choose London, and captures feedback on various aspects of the visit, possible improvements that would strengthen London's offer and the likelihood of return visits.

Validating our evidence base and recommendations

All recommendations have been shaped and validated by more than 100 industry stakeholders, reflecting the breadth of the tourism industry in London. This group spans accommodation providers, attractions, museums, galleries, retailers, restaurants, theatres and transport services among others. It also includes industry organisations that are responsible for skills and employment and planning – areas that have an impact on the tourism industry but are not necessarily consumer-facing.

The Brexit effect

At the time of writing, the UK's negotiations with the European Union regarding leaving the EU have just begun. Our research indicates that Brexit has created uncertainty but its effect and any regulatory changes that might impact the industry have not been factored into our projections.

Industry stakeholders have shaped and validated this vision. This is essential as we all need to collaborate more closely to grow London's tourism economy sustainably.

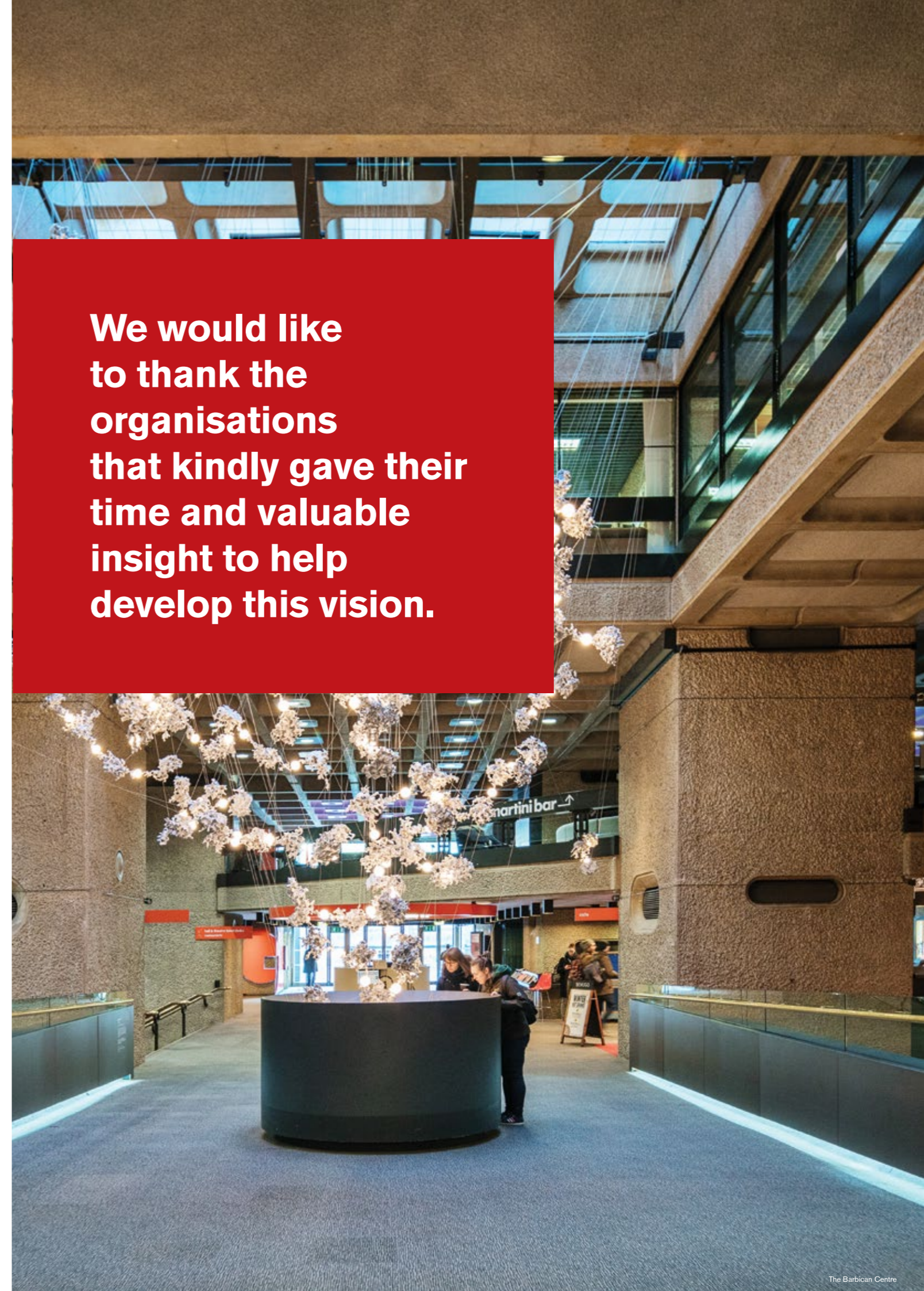
Definitions

- Gross Value Added (GVA): the value of goods and services produced by an economy or sector minus the cost of the inputs used to produce them (all inputs except for the costs of employment). GVA is mainly composed of the income made by employees (earnings) and the businesses (profits) as a result of the production process.
- Visits: growth projections are based on overnight visits and excludes day trips.
- Inbound visits to Europe: includes international travel from outside and within Europe.
- MICE sector: comprises meetings, incentives, conferences and events.

Consultees

- Accor Hotels
- Airbnb
- Association of British Professional Conference Organisers (ABPCO)
- Association of British Travel Agents (ABTA)
- Association of Event Organisers
- Association of Leading Visitor Attractions (ALVA)
- Association of Professional Tourist Guides
- The Audience Agency
- BAFTA
- Barbican Centre
- Better Bankside
- Borough Market Trust
- British Council
- British Hospitality Association
- Business Visits and Events Partnership
- Events Industry Board
- Cadogan Estate
- Cameron Mackintosh
- Cath Kidston
- City Cruises
- City of London Corporation
- Clarion Events
- Clarks Coaches
- Confederation of Passenger Transport
- D&D London
- Department for Digital, Culture, Media & Sport
- Department for Environment, Food & Rural Affairs
- Discover South Kensington
- easyJet
- Edwardian Hotels London
- European Tourism Association
- Event Marketing Association
- Evening Standard
- ExCeL London
- Federation of Small Businesses
- Fortnum & Mason
- Freeman Events
- Gatwick Airport
- GLH Hotels
- Global Blue
- Golden Keys Concierge Service
- Greater London Authority
- GREAT Campaign
- Grub Club
- Harrods
- Harvey Goldsmith Productions
- Heart of London Business Alliance
- Heathrow Airport
- Heritage Lottery Fund
- Hilton
- Historic Royal Palaces
- Ibis Hotels
- Imperial War Museums
- International and American Association for Dental Research
- Jamie Oliver Enterprises
- John Lewis
- Kerb Food
- Lawn Tennis Association (LTA)
- LEON
- London Borough of Croydon
- London Borough of Richmond upon Thames
- London Chamber of Commerce and Industry
- London Councils
- London Enterprise Panel
- London First
- London Food Board
- London Legacy Development Corporation
- London Living Wage Foundation
- Marriott Hotels and Resorts
- MBNA Thames Clipper
- MCI Switzerland
- Merlin Entertainments
- Morris Hargreaves McIntyre
- Museum of London
- National Gallery
- New West End Company
- Night Time Industries Association
- OpenTable
- People 1st
- Port of London Authority
- Premier Inn
- QEII Conference Centre
- RAF Museum
- Regent Street Association
- The Crown Estate
- Royal Academy of Culinary Arts
- Royal Borough of Greenwich
- Selfridges
- Shaftesbury PLC
- Smith & Wollensky
- Society of London Theatre
- Southbank Centre
- Super Break
- Tabl
- Tate
- TFI Group
- Thames Festival Trust
- The British Library
- The British Museum
- The Independent
- The Meetings Show
- Tourism Alliance
- Transport for London
- UK Inbound
- Value Retail / Bicester Village
- V&A
- VisitBritain
- VisitEngland
- Warner Bros. Studio Tour
- West End Partnership
- Zibrant

We would like to thank the organisations that kindly gave their time and valuable insight to help develop this vision.



LONDON'S TOURISM SECTOR TODAY

London is one of the world's most visited cities. Tourism is vital to the capital's economy, responsible for more than a tenth of the city's GDP, and bolsters its reputation as a welcoming and diverse global capital. But competition is increasing from other cities and London's market share is being eroded.

Tourism drives growth across London

Tourism plays a vital role in London's economy. The sector employs 700,000 people – one in seven of the capital's jobs – and accounts for 11.6 per cent of London's GDP.

Equally important are the less tangible benefits where tourism contributes to making London such a diverse and open city. Many of the millions who visit each year become advocates of the capital, returning as visitors or to study, attend an event or conference, work or live.

The sector is growing at a phenomenal rate too. Powered by a global tourism boom and high demand from emerging markets, 2016 marked a record high for overseas visitors to London: there were 31.2 million overnight domestic and overseas trips, an 18 per cent increase since 2011. And £14.9 billion was generated from overnight visits in 2016, an increase of 27 per cent since 2011⁷.

The economic and social benefits of tourism are being shared across London. Upgraded transport links such as night Tubes, quality accommodation and promotions are encouraging visitors to explore the city's outer districts, both in and out of season and around the clock.

London as a driver for UK growth

The UK tourism industry generates 9 per cent of national GDP, contributing £127 billion in gross value added (GVA) to the economy⁸.

London's tourism sector plays an important role: the city has long been a gateway to the rest of the UK with specific attractions, landmarks and historical sites featuring as the leading draws.

Increasing numbers of London-bound visitors are now adding overnight stays elsewhere in the country. A 2015 London & Partners report found that overseas holiday visitors who combine a trip to London with another UK location spend up to 64 per cent longer in the UK overall (including London) than those who visit a single UK destination. These visitors spend around £641 million a year in the UK nations' economies⁹.

Visitors who experience London's diversity and richness of culture, history, heritage, architecture, open spaces and nightlife become advocates of the city and will return multiple times - potentially to study, work, set up a business or live.

VISITOR SATISFACTION

79%

satisfied with overall trip

72%

say trip exceeded expectations

75%

likely to revisit ever

59%

likely to revisit within 2 years

3.6 MILLION

INTERNATIONAL BUSINESS VISITS SPENDING

£3.3 BILLION

Top 5 international visit markets

USA	2.32 MILLION VISITS
France	1.99 MILLION VISITS
Germany	1.47 MILLION VISITS
Spain	1.28 MILLION VISITS
Italy	1.25 MILLION VISITS

31.2 MILLION

Overnight visits in 2016

Spending

£14.9 BILLION

19.1 MILLION

International visits

12.1 MILLION

Domestic overnight visits

REASONS TO VISIT

43.1% For holiday

30.4% Visiting friends and family

21.4% For business

5.1% Miscellaneous

⁷ International Passenger Survey, Office for National Statistics, 2016

⁸ Tourism: jobs and growth. The economic contribution of the tourism economy to the UK, Deloitte & Oxford Economics, 2013

⁹ Understanding the London+ Visitor, London & Partners, 2015



Southbank

London in a global context: visitor numbers up but market share down

London's tourism industry has experienced a largely uninterrupted upward trend over the last 40 years.

But while London remains the number one city for inbound visitors heading to Europe, the capital has dropped one place in the global ranking and is now the third highest-ranking global city for international tourism arrivals in 2015, behind Hong Kong and Bangkok¹⁰.

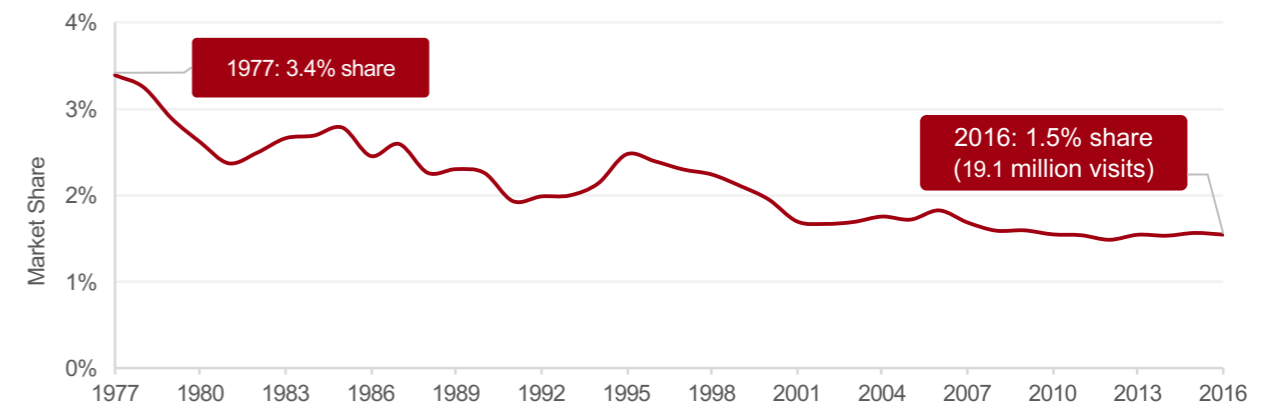
This demonstrates how high demand from emerging markets is fuelling growth and new destinations, particularly in South East Asia, are benefiting.

Growth rate in these markets is now higher than that of many well-established markets, including London. As a result, international inbound visits worldwide reached a record 1.2 billion in 2016, 46 million more than in 2015¹¹.

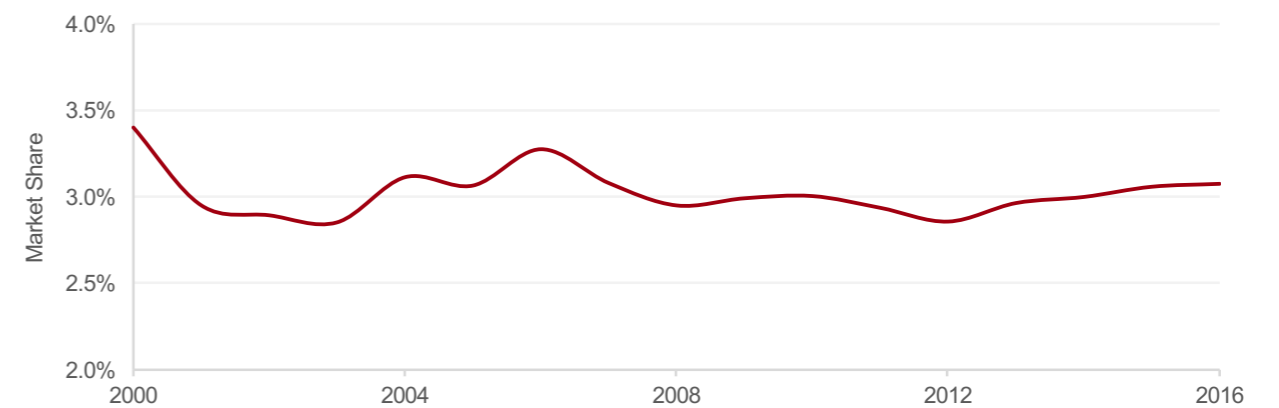
Market shares for well-established destinations are therefore being eroded. At its peak in 1977, London had a 3.4 per cent share of the global market and attracted 8.1 million international visits. By 2016 its share had more than halved to 1.5 per cent, yet the number of international visits had grown to 19.1 million¹².

London remains the market leader for inbound visits to Europe. Growth in absolute numbers has been steady but again market share has been eroded. But since 2013, after London hosted the Olympics in 2012, the city has been growing its market share again.

London's Global Market Share 1977-2016



London's Market Share of Inbound Visits to European Destinations 2000-2016



Camden Market



Wimbledon © Love Wimbledon



Southbank

¹⁰ Top 100 City Destinations Ranking, 2015 (released 2016), Euromonitor

¹¹ United Nations World Tourism Organization (UNWTO): Sustained growth in International Tourism despite challenges, Press release 17 January 2017

¹² Addy Kassova Audience Strategy analysis comparing international arrivals (UNWTO) to London's Visits (IPS)

London Analysis

Visitor satisfaction drives repeat visits

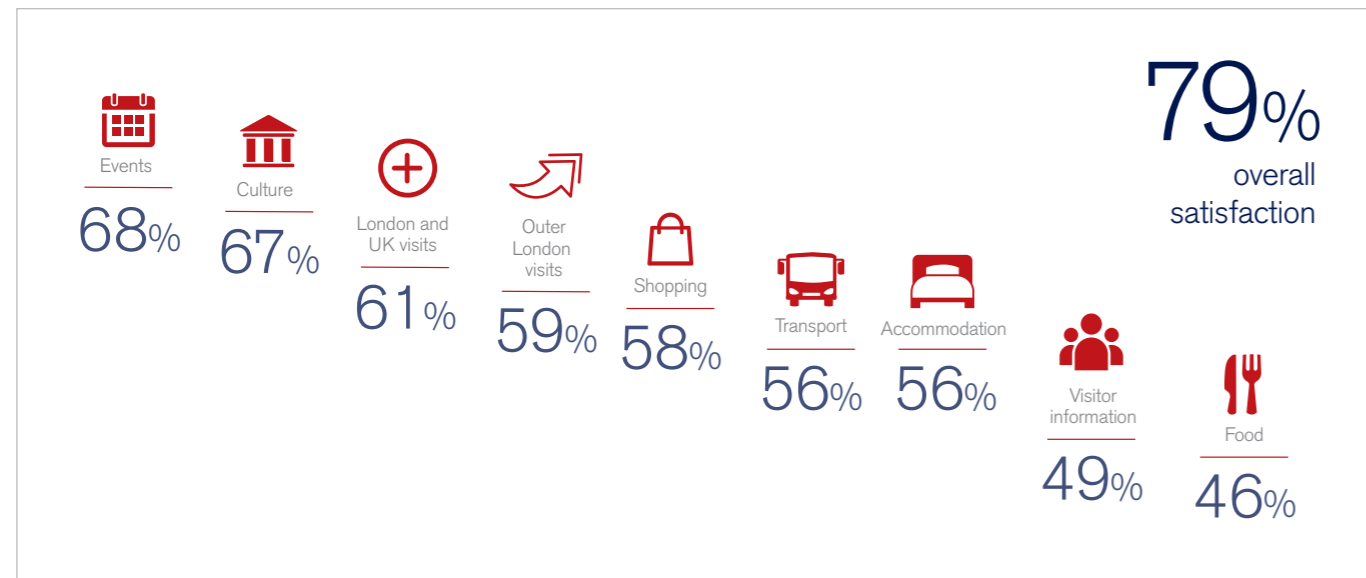
London & Partners' 2016 London Visitor Survey captured the views of more than 4,000 respondents across 11 markets. The survey found that 79 per cent of visitors to London are highly satisfied with their stay¹³.

The research, which included both leisure and business visitors from the UK and overseas, found that 75 per cent of visitors intend to return in the future, 59 per cent within two years. Visitor demand peaks in the summer months, particularly in the leisure tourism sector. Hence, there is more capacity to

75% of UK and international leisure and business visitors to London intend to return at some point, 59% within two years.

accommodate growing numbers in the off-peak months of January, February, March and October. The research found that 71 per cent of visitors would consider arriving outside peak summer months, with only 9 per cent stating that they were unlikely to do so¹³.

Proportion of visitors satisfied with various aspects of their London experience



Culture and heritage as a key draw

Our 2016 London Visitor Survey discovered that culture is critical to the London visitor's itinerary and satisfaction levels. Some of London's top museums and attractions draw more than half of their visitors from overseas¹⁴.

Historic landmarks and architecture, attractions, parks and waterways, and museums and galleries all feature in the top five drivers for visiting the capital, while theatre, music and performance collectively is the tenth highest driver¹³.

Events are also a major factor in attracting visitors, the most popular being a trip to an art or museum exhibition, followed by a live football match and then seeing a play or a musical.

Our survey also confirmed that the vast majority of visitors value the variety and quality of culture and events and recognise their uniqueness.



Lumiere London 2016 © Artichoke/Matthew Andrews

London's role in extending the reach of visitors

Our research discovered a desire for visitors to explore areas outside of central London (zone 1) – in itself a key driver for satisfaction.

Almost three-quarters of visitors ventured outside the centre to get off the beaten track. Length of stay is the key driver affecting the likelihood of exploring further afield rather than if a visitor is a first-time or repeat visitor.

Of those staying eight nights or more, 84 per cent went outside central London during their visit compared to 50 per cent of those staying only one night. About 68 per cent of first-time visitors and 74 per cent of those on a repeat visit reported going outside central London¹³.

The 2016 London Visitor Survey also pinpointed a demand for day trips outside London: two-thirds of London visitors also take in destinations across the rest of Great Britain, including day and overnight trips.

¹³ London Visitor Survey, 2016, London & Partners

¹⁴ Department for Culture, Media and Sport Performance Indicators 2014-15

The role of visitor information

Satisfaction with visitor information stands at 49 per cent according to our survey. While many visitors are satisfied with the tourist information available and how it is communicated to them, there is an opportunity to increase satisfaction by facilitating easier access to relevant tourist information throughout all aspects of trips to London. Points of weakness were finding public toilets, access to wi-fi and getting caught in congested areas of the city.

London's food and dining scene

Our 2016 London Visitor Survey research found that food is a mid-ranking rather than key driver when visiting London generally. Moreover, with a 46 per cent satisfaction rating, London's food and dining scene scores the lowest compared to other aspects.

Our research also discovered that dropping in ad hoc to casual dining options such as pubs, cafés and fast food outlets was the most common choice for visitors. However, satisfaction with London's food and dining experiences tended to be lower when visitors had not researched or planned their food experiences in advance, than when visitors had pre-planned where to eat. If visitors had undertaken research, 57 per cent were satisfied and only 4 per cent dissatisfied, whereas if no research was done, scores shifted to 36 per cent and 14 per cent respectively.

By contrast, satisfaction rates were highest when visitors had experienced food-related tours, festivals and markets or fine dining.

The survey also discovered that while food has little impact on overall trip satisfaction, it can drive advocacy: visitors satisfied with food are more likely to be 'promoters' of London.



Kew the Music festival © RGB Kew

Business tourism is booming but needs investment to fend off competition

London has grown in stature as a business meetings destination. In the International Congress and Convention Centre (ICCA) rankings, the city rose from 19th in 2008 to 5th in 2016¹⁵.

In 2016, the number of overseas business visitors to London generated 3.6 million arrivals. Spend from overseas business visitors reached record levels, at £3.3 billion, the segment accounting for 27 per cent of international spend¹⁶.

But competition has increased significantly as other cities such as Barcelona, Vienna, Dubai, Hong Kong and Paris have invested heavily in MICE infrastructure and promotion.

Response from Michael Hirst OBE, Chairman, Business Visits and Events Partnership
Business events build London's international reputation, facilitate innovation and connections, help the city attract foreign direct investment and help London businesses to export. They also showcase London's business strengths and innovative medical science and technology capability.

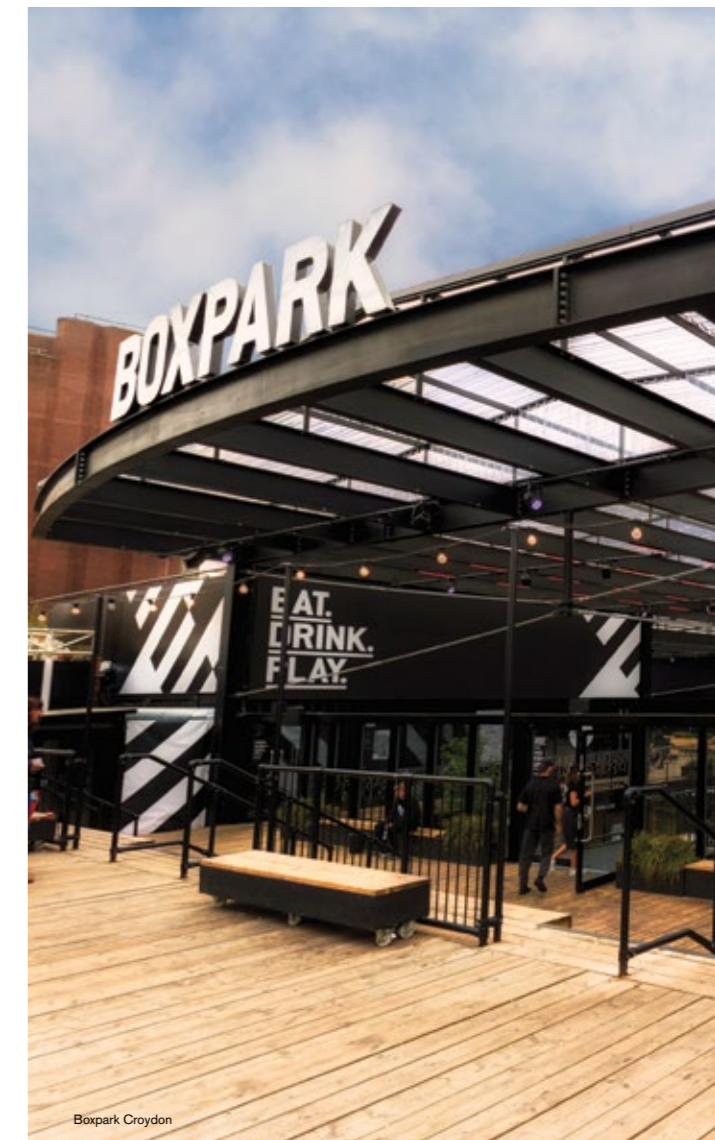
However, there should be a better understanding of the trends, motivations and needs of both buyers and attendees that will help service the needs of business event organisers.

With the recent loss of larger venues, such as Earls Court in the west of London, there is also a risk that the appropriate capacity is not available across the city. There is undoubtedly huge potential to encourage more meetings, conferences, exhibitions, incentives and events to the capital.

With venues, infrastructure and marketing gearing up across competing cities, I'm pleased to welcome this report, which underlines the efforts London must take to retain and grow its international share of the business events market.



Bonfire © Thomas Skovensende



Boxpark Croydon

¹⁵ Statistics Report, Country and City Rankings, ICCA 2016
¹⁶ ONS IPS, London & Partners analysis

OVERCOMING BARRIERS TO GROWTH

London's tourism industry is facing four key challenges: Brexit is causing uncertainty over recruitment from the EU, the visa application process is thwarting growth from Asia, and accommodation and airline capacity need to scale up to meet demand projections.

Building a sustainable workforce

According to the latest research¹⁷, a significant proportion of the industry's 700,000 workers do not view their job in tourism and hospitality as a viable, long-term career. This attitude is causing high staff turnover, lower productivity and higher recruitment and training costs.

London's tourism and hospitality industry has grown increasingly dependent on EU workers, which now make up 25.7 per cent¹⁷ of the sector's employees. However, uncertainty around the UK leaving the EU is creating concerns about the ability to recruit staff from outside of the UK.

With a 30 per cent annual attrition rate¹⁸, of which 10-30 per cent¹⁷ is estimated to leave the industry, it is possible that the sector needs to attract 21,000-63,000 staff just to maintain staff levels. So how will the industry attract, recruit and retain talent to meet this need?

Increasing aviation capacity

At face value, London's existing runways and airports have sufficient capacity to support the growth outlined in this vision to 2025¹⁹. However, this assumes that current expansion plans are realised.

At present, 50 per cent of London's spare air passenger capacity is at London Stansted Airport. Growth in London's airports is subject to other constraints such as planning for additional terminal capacity as well as challenges over attracting airlines prepared to fly to destinations with demand.

Response from Bernard Donoghue CEO, Association of Leading Visitor Attractions

The Mayor's efforts to position London as an open and welcoming city are important. So are the calls for UK cities to have a flexible immigration system that responds to demand, not one that places additional costs and burdens on employers.

If the Government is unable to provide this flexibility, then the Mayor is calling for cities such as London to have greater influence over the allocation of work visas in the capital. It will be important that the Mayor's Economic Development Strategy, and the Tourism Sector Deal under the Government's new Industrial Strategy, focus on addressing the impact of skills shortages on capacity and productivity in this sector.

Response from Stewart Wingate CEO, Gatwick Airport

If Britain is to meet the growing demand from high-growth markets, then we must make the most of every opportunity including making the best use of existing facilities and developing additional capacity. Gatwick will deliver a new runway for Britain in addition to Heathrow should the Government give us the go-ahead. In the meantime, improving the range, speed and quality of rail links between London and key airports should also be pursued. We applaud the upgrades to the Brighton Main Line – which serves Gatwick Airport, that are both planned and underway.



Making access easier for Asian visitors

London's tourism sector is concerned about the barriers and costs involved in providing Indian and Chinese visitors with visas.

The Government is working to ease the visa application process for Chinese visitors: as of early 2016, visitor visas for tourists from China are valid in the UK for two years, rather than six months.

There are also plans to introduce a new ten-year multiple entry visit visa, and mobile fingerprinting services are to be extended to an additional 50 Chinese cities to make it easier for the Chinese to apply for a visa²⁰.

Increasing accommodation capacity

It is estimated that London needs at least an additional 23,000 hotel rooms by 2025²¹. To share the economic and social benefits of tourism more fairly across London, the Mayor has pledged to support the development of hotels in opportunity areas and town centres in outer London with good connections into the centre. Here, the opening of the new Elizabeth line (Crossrail) is a key enabler and will broaden the range of destinations within easy reach.

**Response from Brian Bickell
CEO, Shaftesbury PLC and Chairman, UK China Visa Alliance**
There is scope for significant growth in visitor numbers from Asian markets including India and China. However, this growth will only be achieved with greater investment by the Home Office to process these applications more effectively.

It's important to note that these practical challenges could be dwarfed should visa-free travel no longer be an option as the UK leaves the EU. Electronic Travel Authority technology is now improving how visits are recorded and managing security concerns and their use should be extended wherever possible.

**Response from Ufi Ibrahim
CEO, British Hospitality Association**
Accommodation needs to be made available in the right formats, numbers and locations to meet ever-changing visitor needs. To sustain current growth, industry and government need to collaborate to build a sound foundation to a sector that is vital to London's economy.

There should be a level playing field in terms of regulation for all types of accommodation. This is particularly important as the sharing economy grows. Reinforcement of the ruling that sharing economy rentals should not be booked for more than 90 days without local authority approval will go some way to assisting with this.

¹⁷ Labour migration in the hospitality sector, a KPMG report for the British Hospitality Association, March 2017

¹⁸ State of the Nation (2013), People 1st

¹⁹ CAA, Airport Commission (Davis report), Individual Airport press releases

²⁰ Press release, Prime Minister's Office, PM announces significant changes to visitor visas for Chinese tourists for the benefit of the British economy, October 2015

²¹ Projections of demand and supply for visitor accommodation in London to 2050, April 2017 GLA Economics

THE OPPORTUNITY

Visits to the capital in 2025 are projected to grow by 30 per cent compared to 2016, securing 40.4 million international and domestic visits and £22 billion in expenditure annually. But such growth and associated economic benefit is not a given.

According to London & Partners' modelling, as long as domestic and international visitors continue to rate the UK capital as a prime destination, visits to London will increase to 40.4 million annually by 2025 (up from 31.2 million in 2016). This is equivalent to a compound annual growth rate (CAGR) of 2.9 per cent for domestic and international visits combined and 3.4 per cent for international visits alone.

We also forecast expenditure in 2025 to be worth £22 billion compared to £14.9 billion in 2016. This is equivalent to a CAGR of 4.5 per cent for domestic and international spend combined and 4.8 per cent for international spend alone.

These projections are based on steady growth of both domestic overnight and international visits.

Our modelling assumes three factors:

- 1.** The industry's ongoing focus on markets with significant growth potential, namely the US, France and China.
- 2.** Continued strong growth from London's core visitor markets in Europe, for example Spain, Italy and Germany.
- 3.** An increase in the visitor 'repeat rate' as a result of attracting first-time visitors earlier and improving the visitor experience.





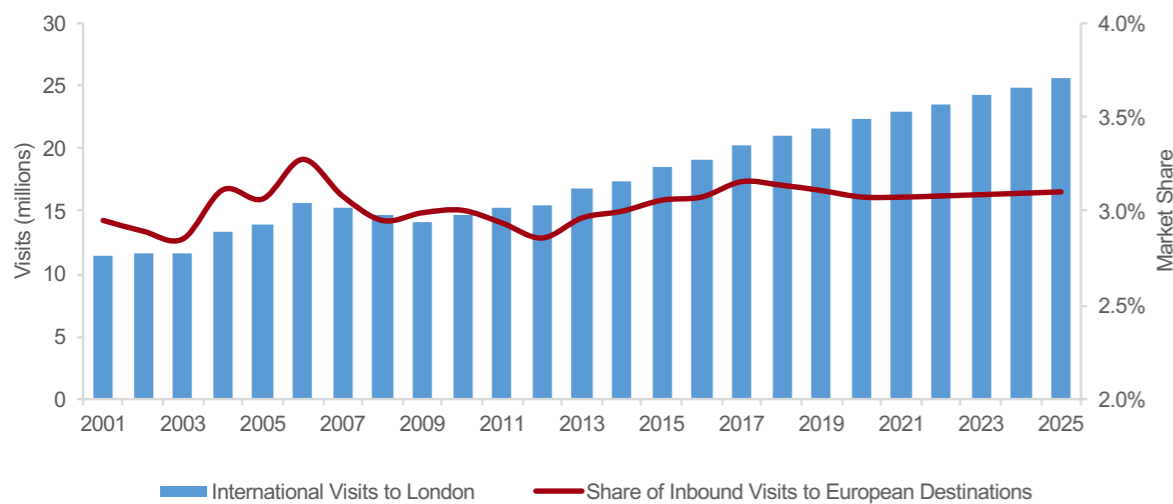
By 2025, we predict most visits and spend will continue to come from London's core markets, particularly Europe and North America. Here, the largest five markets – the US, France, Germany, Spain and Italy – will generate about 43 per cent of all visits and 36 per cent of spend. Europe alone is estimated to account for 66 per cent of volume by 2025, down from 67 per cent in 2016.

The largest percentage growth will come from emerging markets. We predict that China and India will be among

London's top 20 largest inbound markets, based on visitor numbers, by 2025.

Compared to a declining CAGR for Europe as a whole, we predict London will retain its share of the European inbound market as long as the city maintains its attractiveness as an international destination. This means that by 2025 London would see 6.6 million more international visits than it does today, taking the total from 19.1 million in 2016 to 25.7 million.

London's share of inbound visits to Europe vs number of international visits to London (2001-2025)



How London can rise to the challenge

There are so many exciting developments in the pipeline to help London maintain its attractiveness to tourists the world over. Enhancing its appeal and accessibility to visitors will be major new transport infrastructure projects such as the Elizabeth line, a new cultural quarter on the Queen Elizabeth Olympic Park, the development by Paramount of a major new theme park at Ebbsfleet and, the project I am leading, a new and enlarged home for the Museum of London in the City which is part of the Culture Mile.

Since hosting the Olympic Games and 2017's IAAF Athletics World Championships, London is also recognised as an international sports city with exciting plans to attract more sporting events to the capital. This includes plans to bring back Tour de France, establish an NFL franchise and bring Major League Baseball to the capital.

Preserving London's culture and heritage is also critical. The Mayor pledges to protect live music venues, clubs and pubs. An increased focus on cultural place-making and the new London Borough of Culture competition is putting culture at the heart of communities. For tourists, this creates an exciting opportunity to experience the character and diversity of London's people and places, facilitating cultural exchange.

Sharon Ament
Director, Museum of London

2025 growth projections

As outlined below, and summarised in the table on page 31, all existing top markets will contribute to London achieving 40.4 million visits by 2025.

Europe

London is anticipated to remain a popular destination for European visitors, with a 32 per cent growth in visits from the region anticipated between 2016-2025.

By 2025, **France** will still be London's largest European market and the second largest overseas market overall, with visits increasing from 2 million in 2016 to 2.8 million in 2025. After experiencing a tough 2016 France is also projected to pick up in 2017 and grow robustly thereafter.

Above-average growth is anticipated from some European markets, with CAGRs hitting 3.8 per cent for the **Republic of Ireland** and **Poland** between 2016-2025.

North America

Visits from the **US**, London's largest source market, have been increasing year on year since 2010, with a 2011-16 CAGR of 4.7 per cent. However, there is still room for further growth, as the number of arrivals from the US market has not yet recovered to reach levels seen prior to the economic recession.

Growth in the volume of visits from the US to London are set to remain healthy, with a CAGR of 4.1 per cent from 2016-2025, equating to an increase in visits of 43 per cent overall during the nine-year period. 2019 could see volumes surpassing the 2006 peak of 2.54 million US visits to the capital, reaching 2.6 million.

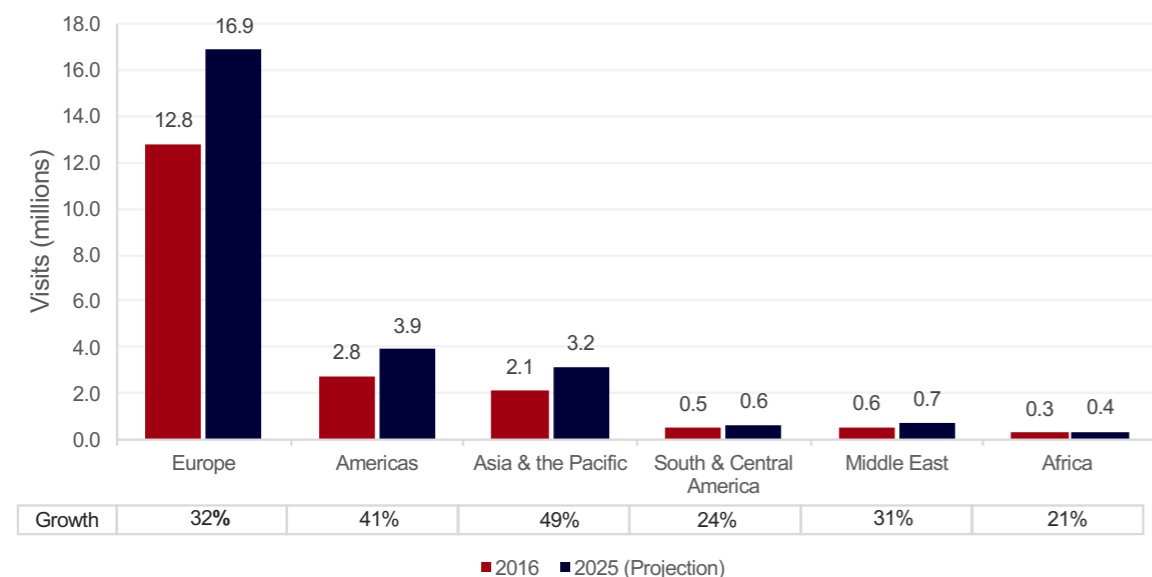
Canada is projected to have a CAGR of 2.9 per cent between 2016-2025.

Asia

The strongest growth is anticipated to come from Asia, with a 49 per cent increase projected in the number of visits to London between 2016-2025.

China is a fast-growing inbound visitor market for London, with the volume of visits increasing by 105 per cent between 2011-2016 – a 15.4 per cent CAGR.

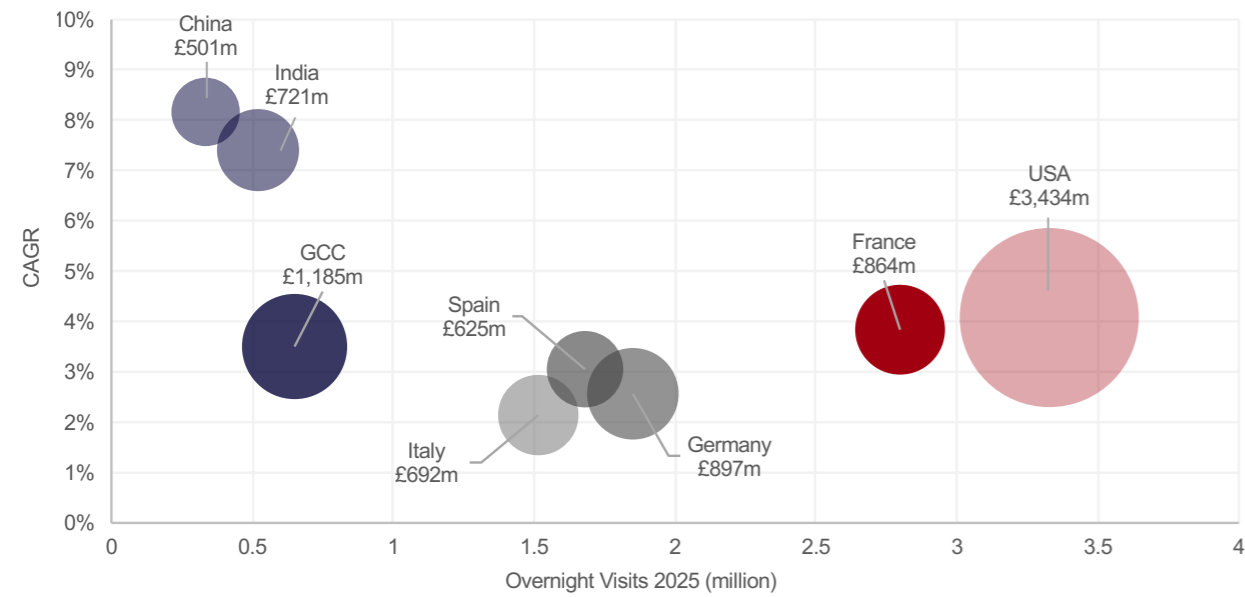
Ten-year overseas London tourism projections (by region, millions)



Top 25 overseas markets for London (ranked by 2025 Projected Visits)

Market	VISITS (millions)				SPEND (£ millions)			
	2016	2025 (Projection)	2016-2025 projected growth	2016-2025 projected CAGR	2016	2025 (Projection)	2016-2025 projected growth	2016-2025 projected CAGR
US	2.32	3.33	43%	4.1%	1981.8	3433.6	73%	6.3%
France	1.99	2.80	40%	3.8%	711.5	863.7	21%	2.2%
Germany	1.47	1.85	26%	2.6%	618.5	897.5	45%	4.2%
Spain	1.28	1.68	31%	3.1%	542.8	625.1	15%	1.6%
Italy	1.25	1.51	21%	2.1%	563.1	691.8	23%	2.3%
Republic of Ireland	0.81	1.13	40%	3.8%	371.0	727.8	96%	7.8%
Netherlands	0.81	1.04	29%	2.9%	296.2	369.9	25%	2.5%
Australia	0.60	0.83	39%	3.7%	478.9	804.1	68%	5.9%
Poland	0.53	0.75	40%	3.8%	156.5	174.4	11%	1.2%
Switzerland	0.53	0.67	28%	2.8%	378.9	518.4	37%	3.5%
Sweden	0.51	0.66	30%	3.0%	289.6	526.5	82%	6.9%
Canada	0.45	0.58	30%	2.9%	268.6	350.1	30%	3.0%
Belgium	0.45	0.58	27%	2.7%	145.9	192.1	32%	3.1%
Denmark	0.41	0.53	29%	2.9%	217.0	288.8	33%	3.2%
India	0.27	0.52	90%	7.4%	258.0	721.2	180%	12.1%
Norway	0.38	0.50	31%	3.0%	228.2	330.1	45%	4.2%
Romania	0.28	0.40	44%	4.1%	194.3	534.9	175%	11.9%
Portugal	0.28	0.35	24%	2.4%	123.7	122.3	-1%	-0.1%
China	0.16	0.33	103%	8.2%	218.5	500.7	129%	9.7%
United Arab Emirates	0.19	0.26	43%	4.0%	306.0	370.3	21%	2.1%
South Korea	0.16	0.22	40%	3.8%	105.2	211.1	101%	8.0%
Austria	0.18	0.22	24%	2.4%	87.0	119.6	37%	3.6%
Israel	0.15	0.22	39%	3.8%	105.3	168.6	60%	5.4%
Japan	0.18	0.21	18%	1.9%	142.9	139.9	-2%	-0.2%
Czech Republic	0.16	0.21	34%	3.3%	72.3	168.7	133%	9.9%

Key source markets for overnight visits, 2025 projection



Goldman Sachs predicts that the number of Chinese passport holders will increase by 100 million over the decade. This is likely to lead to a significant increase in Chinese visitors across the globe, including to European destinations, subject to air connectivity and visa arrangements²².

Despite this growth in absolute numbers for London, the city's share of the total number of Chinese outbound travellers has declined to around 0.1 per cent. This is due to China's phenomenal growth of outbound travellers – from 2.4 annual departures per 100 Chinese people in 2005, to 8.5 per 100 in 2015²³.

However, there is huge potential to further increase the growth in the number of Chinese visitors coming into London. It is projected that there will be 0.33 million visits a year to London from China by 2025, an increase of 103 per cent compared to 2016 and representing a CAGR of 8.2 per cent. This would make China London's fastest-growing market.

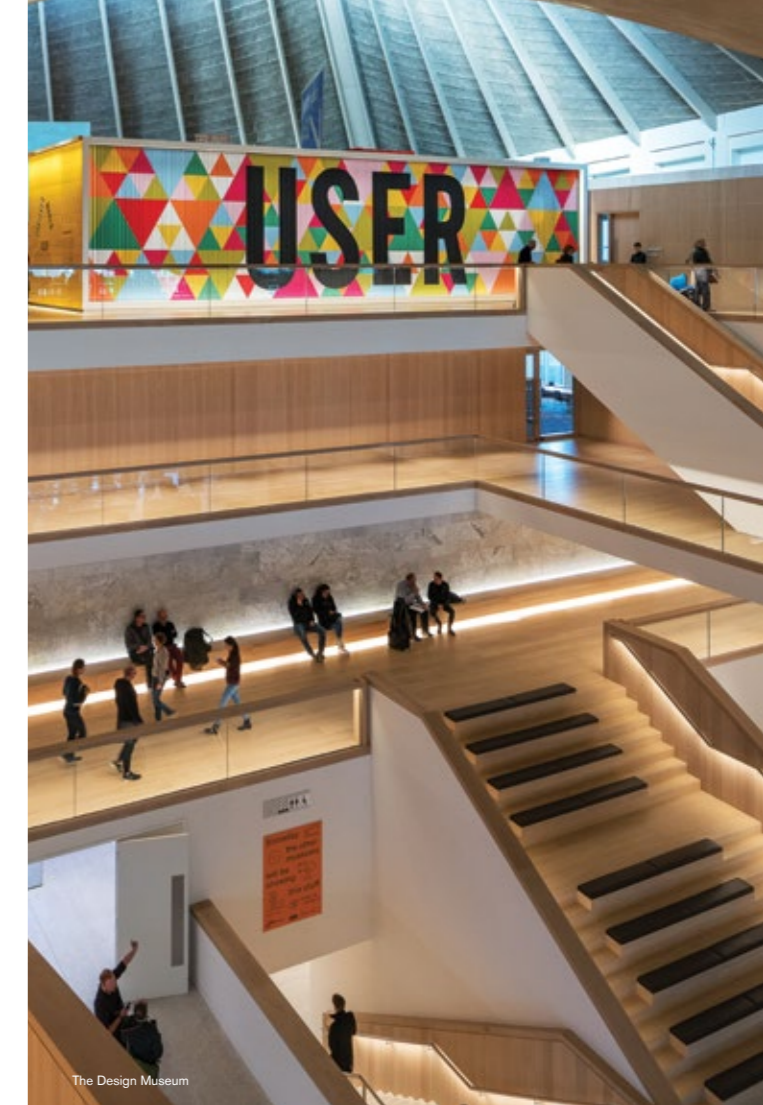
India is projected to become London's second fastest-growing inbound market after China, with the World Tourism Organization (UNWTO) predicting that outbound world visits from India will reach 50 million by 2020.

According to the World Travel & Tourism Council (WTTC), India is expected to establish itself as the fourth largest travel and tourism economy by 2027. With an 7.4 per cent projected CAGR, India is predicted to reach 520,000 visits to London by 2025, an increase of 90 per cent against 2016.

Middle East

Significant growth is predicted to come from the Middle East, driven by high growth from the United Arab Emirates and Kuwait. Between 2016-2025 the CAGRs for these two nations are expected to reach around 4 per cent.

²² The Asian Consumer, The Chinese Tourism Boom, Goldman Sachs, 2015
²³ World Bank Departures data divided by IMF population data



RECOMMENDATIONS

London could cement its position as one of the world's most attractive and open cities, with visitor spend in 2025 potentially up by £7.1 billion on 2016. But the tourism sector believes this can only be achieved if the industry collaborates and the city invests in pre-visit promotion, the visitor experience, infrastructure and amenities, and developing the offer for business visitors.

This chapter sets out the collective recommendations of London's tourist sector. All ambitions have been endorsed by leading industry organisations and service providers.

Creating a world-class visitor experience will be crucial to growing London's tourism sector as visitors are seeking more immersive experiences, delivered both digitally and physically.

The vision

Our vision is that visitors will be able to unlock the best version of London for them by tailoring their experience.

They will be provided with better online and offline information to help them navigate the city more effectively and make more informed choices.

They will be encouraged to do and see more of London, which will increase their satisfaction and likelihood of returning.

The tourism industry will work together to manage the expected significant visitor growth in a sustainable way.

And we will achieve our vision by balancing the needs of Londoners and visitors, with more Londoners recognising the importance of the visitor economy and benefiting from its social and economic impact.

How we are going to do it

The industry believes this vision can be realised through activity in four areas:

1

Pre-visit promotion Convincing more visitors to choose London

- Attract more first-time visitors
- Boost off-peak travel
- Showcase the range and depth of London's cultural offer

2

Visitor experience and information Ensuring visitors do more and see more while they have an excellent experience in London:

- Encourage and enable visitors to see more of London
- Improve the visitor food experience
- Connect Londoners and visitors

3

Infrastructure and amenities Ensuring London can sustain and accommodate growing numbers of visitors:

- Invest in cultural infrastructure
- Improve the quality of London's visitor amenities
- Harness digital technology

4

Developing the infrastructure for business visits and events

- Grow London's share of global market



1

Pre-visit promotion

This activity covers attracting more first-time visitors, boosting off-peak travel and showcasing London's cultural offer.

Attract more first-time visitors

Attracting first-time visitors is essential. Once they have made their first trip to London, visitors tend to come back, generating a high 'lifetime value'. International Passenger Survey figures indicated that 74 per cent of visitors to London in 2015 had previously been to the UK and the mean number of visits made to the UK during the last decade was 5.4. The average repeat visitor spent around £4,200 between 2006-2015²⁴.

The **US** and **France** are already London's two largest source markets. With continued promotion, the US, in particular, is expected to grow at a faster pace than other high-volume markets. Here, demand from the US is projected to return to levels seen prior to the financial crisis.

Some of London's other largest source markets – the **UK** domestic market and **Spain, Italy** and **Germany** – show strong potential to grow further and to retain their position as leading source markets after the US and France.

With London currently lagging behind other leading European cities in attracting Chinese visitors, growth from **China** – the world's largest travel economy – is set to outpace most other geographies. While not significant in terms of volume, key Gulf Cooperation Council (**GCC**) markets are also projected to contribute greatly in value.

Recommendation for the industry

- **Focus additional effort and resource on attracting more first-time visitors from markets with strong growth potential. Key first-time visitors to target within these markets include families and young adults.**

Boost off-peak travel

Our research discovered the majority of visitors to London would consider visiting the capital during the UK's 'off-peak' months. The inclination was particularly marked in domestic visitors and among tourists from China – a location with public holidays that do not necessarily coincide with British breaks²⁵. As London draws its tourists from a wider geographical pool, alternative holiday patterns will help balance demand with capacity.

The most powerful incentives for travelling off-peak are special offers on flights, accommodation or holiday packages. Moreover, special events – cultural, sporting or seasonal – also motivate travellers.

Recommendations for the industry

- **Curate content into 'seasons' or themed months to create incentives to travel during off-peak periods.**
- **Develop existing events in off-peak months into larger, more internationally recognised occasions.**
- **Encourage further collaboration and alignment across public and private sectors to secure, deliver and promote major off-peak events. For example, city-wide collaboration across a range of private and public sector partners will be required to attract the big stadium events that London needs to become the sports capital of the world.**



Caravan, King's Cross

Showcase the range and depth of London's cultural offer

Culture is the most significant driver of visits to the capital. Our research shows that the cultural experience, together with attending cultural or sporting events, is linked with high levels of satisfaction²⁴.

Also visits made by tourists, both domestic and international, play a key role in supporting the range and richness of London's cultural sector. This is demonstrated by the large percentage of international visitors to top museums, attractions and heritage sites.

We found that visitors who manage to unlock the best version of London for them have tailored their experience to fit their individual needs and budgets.

In our research, the ability to tailor experiences, the quality and the uniqueness of London's cultural offer and the ease of checking out availability and booking tickets are all central to determining overall satisfaction. Some visitors clearly required more help with the practical issues of booking, travelling and finding the venue.

Recommendations for the industry

- **Continue to invest in innovative and diverse culture to give visitors compelling reasons to visit and return to London. Showcase the depth and breadth of cultural content and activities that are on offer across London.**
- **Bring cultural content to life digitally. By using existing media, multiple language social media channels and new technologies such as virtual reality, there is an opportunity to broaden the reach of London's culture, promote it to international audiences and create calls to action.**
- **Utilise existing promotional platforms more effectively by encouraging cultural institutions to create well coordinated events by aligning marketing initiatives, for example, around specific themes or to celebrate key events.**

²⁴International Passenger Survey, Office for National Statistics, 2016

²⁵London Visitor Survey, 2016, London & Partners

2

Visitor experience and information

This area covers improving visitors' access to information about food experiences and encouraging visitors to explore areas beyond central London and connect with Londoners.

Encourage and enable visitors to see more of London

Our research shows that visitors who also explore areas outside central London are more satisfied with their stay²⁶. The journey is a key part of the experience, so more could be made of alternative forms of transport such as walking, cycling and the river.

Recommendations for the industry

- **Invest in focused promotions and innovative channels to create reasons to do more and see more of London. Match locations and tailor itineraries to audiences with specific interests and needs. Promotions could target families, millennials and other groups which tend to stay longer and so have more time to explore, such as visitors from the US, Australia and China.**
- **Provide the practical information to enable visitors to navigate London effectively and save time and money. Make it easy for visitors to obtain tickets, such as Oyster Cards prior to getting to the city and at the point of arrival. Promote existing journey-planning tools from Transport for London (TfL) and others, for example Citymapper. This helps visitors better understand how to combine different modes of transport, on land and on the river, together with associated cost and travel time.**
- **Ease demand at peak periods by providing visitors with up-to-date information on congestion levels and queuing times at popular attractions. Explore how technology, such as apps and dashboards, social media and online channels, can help here. Promote districts with prominent messaging, focusing on short and easy journey times eg 'only 20 minutes from Waterloo'.**

Improve the visitor food experience

Food is typically a key consideration for people choosing city breaks. But London bucks the trend: food is not a key driver for London visitors and was the lowest scoring factor for satisfaction in our 2016 London Visitor Survey.

However, there is an opportunity to strengthen the 'pulling power' of London cuisine by showcasing the city's multicultural culinary offer and by providing better information about dining choices.

Our research shows visitors who make informed decisions are more satisfied with London's food offering and are more likely to be advocates for the city. These visitors can also play an important role in improving the perception of, and dispelling myths about, London's great and diverse food offering.

Recommendations for the industry

- **Build awareness of food- and drink-related tools that provide visitors with information, advice and recommendations to help them decide what and where to eat.**
- **Promote London's food experiences to showcase the diversity of the city's food offering, focusing on its food markets, food festivals, street food events, fine-dining experiences, afternoon tea, food tours and pop-ups. All these experiences are highly rated by visitors.**
- **Signpost good food offerings close to tourist hotspots by working with business improvement districts (BIDs) and other industry consortia.**

²⁶ London Visitor Survey, 2016, London & Partners

²⁷ The Mayor of London's volunteer scheme launched in 2012 and designed to encourage Londoners to give their time to make the capital a better place



Home sharing provides visitors with an alternative form of accommodation, disperses tourism across the city to the outer boroughs, and financially benefits Londoners. Hosts in London are ambassadors for their city, offering visitors a more authentic and local travel experience in communities beyond the city centre. By hosts sharing their local knowledge and off-the-beaten-track hidden gems, over 4 million guests to the capital have really felt like they've lived like a local.

James McClure,
General Manager, Northern Europe, Airbnb

Connect Londoners and visitors

Cities such as New York, Paris and Chicago offer successful 'greeter schemes' to connect visitors with local guides. During the 2012 Olympic and Paralympic Games 60,000 Games Makers and 7,000 Team London Ambassadors strengthened London's reputation as a welcoming city. Our research suggests that there is scope to build on such activities to improve the visitor experience and the provision of information.

Recommendations for the industry

- **Work with Team London²⁷ and Transport for London to build on the success of the city's volunteering schemes and learn from other cities to provide more support to visitors at major events and at tourist hotspots. Explore developing a digital tool to connect Londoners and visitors and support visitors with specific interests or needs.**
- **Encourage the sharing economy's accommodation hosts as well as hotel concierges to act as advocates for their areas, enabling their guests to experience London 'like a local'. Extend the suite of curated neighbourhood itineraries for visitors.**



Pride in London © Carlos Calika

3

Infrastructure and amenities

This area advocates investment in cultural infrastructure and digital technology.

Invest in cultural infrastructure

The capital's culture, heritage, parks and its river is what makes London, London. The creativity and innovation of the arts and culture sector plays a huge part in the city's global appeal and success. Crucially, it attracts cultural tourists - a highly valuable segment estimated to spend £7.2 billion annually in London²⁸. The Mayor of London recognises the importance of investment in this sector and his cultural infrastructure plan²⁹ will play a key role.

Recommendation for the industry

- **Preserve London's cultural infrastructure, which has been identified as at risk. Support the development of guidance for local authorities to encourage planning that supports cultural infrastructure, for example, to encourage new live/work spaces for artists as well as to protect the future of London's pubs, music and cultural venues.**

Improve the quality of London's visitor amenities

According to our research, most visitors are satisfied with the capital's amenities, retail outlets and the quality of public areas across the city. However, areas for improvement include making London more accessible – for example by extending and linking modes of transport – and by improving signage in public spaces and ensuring they provide a greener and more inviting environment in line with London's aspiration to be the world's greenest global city.

Recommendation for the industry

- **Improve the pedestrian experience to make neighbourhoods more attractive for visitors and Londoners alike. Build on best practice projects such as Transport for London's Healthy Streets programme³⁰, the shared space of Exhibition Road and the planned transformation of Oxford Street³¹.**

Harness digital technology

Digital technology has the power to connect visitors to an enormous range of experiences by personalising and curating content. Visitors in their turn play a central role as they create and engage with content, liking, blogging and retweeting at will. Accessing information on the go is important for visitors.

Recommendation for the industry

- **Improve visitor access to digital information, potentially by joining up wi-fi services provided by TfL, local authorities and other bodies. Realise the Mayor's plan to improve connectivity in London and treat digital infrastructure as a key public utility.**

4

Developing the infrastructure for business visits and events

This area focus on how to assess and develop London's meetings, incentives, conference and events (MICE) infrastructure.

Grow London's share of global market

Despite recent success, London's tourism industry believes it needs to raise its game in order to retain and grow its share of the international MICE market. Securing adequate capacity and delivering a world-class customer experience are central aspirations. The following recommendations could be overseen by a London MICE Advisory Panel, which could help facilitate better cooperation of the industry in London.

Recommendations for the industry

- **Strengthen the evidence base for London's MICE sector: review the opportunities and barriers to growth and analyse anecdotal evidence from stakeholders. Explore ways to expand capacity including a potential city-wide scheme to promote alternative and authentic meeting spaces to businesses. For example, undertake a demand study for a new conference and hotel complex.**
- **Improve London's 'welcome' to large business conferences and congresses. Step up mayoral and ministerial support and potentially support from key influencers to strengthen bids for large conferences and congresses and to welcome the events to the capital. A physical welcome (for example 'dressing' the city and providing access to city assets and venues) proves that London cares about and wants this business.**
- **Expand the London Convention Bureau's London Ambassador Programme³² by engaging high-profile figures and subject matter experts who can make the case for London – either directly with congress organisers and events planners or as speakers at events.**



- **Address regulatory constraints that make London less attractive for delegates. For example, explore the viability and impact of reducing VAT on conference registration fees by reclassifying conferences as education. Also, explore how to reduce the complexity, time and cost of obtaining visas for delegates from countries such as India and China as these are currently factors that discourage event organisers from choosing London.**

²⁸ GLA Economics 2015

²⁹ The Mayor of London has committed to creating a Cultural Infrastructure Plan for 2030 in a bid to sustain London's future as a cultural capital

³⁰ A programme designed to encourage Londoners to use cars less and walk, cycle and use public transport more

³¹ TfL and Westminster City Council is exploring ways to improve Oxford Street's public spaces, cut traffic and overcrowding, further support retailers and improve air quality

³² www.conventionbureau.london/associations/london-ambassador-programme



Launch of London's Autumn Season with the Mayor of London, Sadiq Khan. Science Museum, 2016

THE ROLE OF LONDON & PARTNERS

London & Partners exists to promote London internationally to create growth and jobs for the benefit of London and Londoners. We work in partnership with the tourism industry to attract more leisure and business visitors to the capital.

London & Partners' role in tourism promotion

As the Mayor of London's official promotional agency, our role is to raise awareness of London as a destination for leisure and business visitors, persuade them to come and guide them to make the most of London. Our ambition is to encourage visitors to become champions of the city and spread the message through word of mouth and digital channels.

Our leisure tourism activity includes:

- creating and executing high-impact global marketing and PR campaigns to inspire visitors to come to London for city breaks, day trips and longer holidays
- running the capital's official tourism website, visitlondon.com, and associated app and social media channels to attract and convince visitors to choose London
- working with travel trade operators to ensure they have a deep understanding of the London offer and can sell the city effectively to their customers

Our business tourism activity includes:

- running London's official convention bureau, which offers free, impartial guidance and support to event planners, associations and convention organisers who are considering London
- bidding to win larger-scale conventions and corporate meetings in key sectors
- maintaining and building London's global profile as a leading events city by bringing the capital to the world at leading industry trade shows and through our digital channels including conventionbureau.london

Implementing the recommendations

We have already started to modify our targeting and activities in the light of the growth forecasts and insights outlined in this vision document. We are also working with our partners to help address the issues highlighted. The recommendations are informing our longer-term strategy and action plans.

1. Pre-visit promotion

Attracting more first-time visitors

We have focused our activity on those markets that give the best return: the US and near European markets. We have also recently worked with partners to pilot activity targeted at Gulf Cooperation Council countries and, subject to resources, aim to extend this to stimulate demand from China.

Boosting off-peak travel

To encourage more visitors to visit off-peak we have been working with partners to curate activity in off-peak months. Examples include our Christmas campaign, which reached 3 million people and generated 8.7 million page views on visitlondon.com. Our website visitlondon.com was the digital home of the Lumiere light festival in February 2016 and will be again when the event returns in 2018. Lumiere 2016 attracted 1.4 million attendees to the city, with an audience spend of £22 million. This is an example of an activity that successfully attracts young adult visitors and contributes to the night time economy. Together with the Mayor, we are working to attract more international sporting fixtures to London such as the growing NFL season.



How we work

Laura Citron, CEO, London & Partners

Our partners are central to our work, supporting us with their insight, expertise, contacts and knowledge and providing valuable funding and in-kind support.

We partner with more than 400 organisations across London's events, leisure and business tourism sectors to increase the scale, reach and economic impact of our work. Our activities are based on audience insight, gleaned through primary and secondary research.

We focus on activities that generate the best return on investment and where we can bring the industry together to augment our activity to create greater impact.

Showcasing the range and depth of London's cultural offer

September to December 2017 will see the fourth edition of our London's Autumn Season campaign, which will showcase the best of London culture right across the city from blockbuster exhibitions to new theatre openings and festivals. We intend to grow the campaign with city 'dressing' and new events to celebrate the diversity of London culture.

We are also promoting London's extraordinary cultural offering through visitlondon.com and its sister website theatre.london, the latter going beyond the West End to take in fringe productions, street theatre, interactive and experiential productions and stand-up comedy.

2. Visitor experience and information

We are encouraging visitors to see more of London and beyond. Over the last year we have published comprehensive guides to London's local neighbourhoods and areas on visitlondon.com. The guides feature hidden gems, favourite haunts and top tips from expert local guides and encourage visitors to experience the capital like a Londoner.

With support from the Discover England Fund³³ we are also developing promotions with other English regions to encourage people to visit London and beyond as part of the same trip. The first pilot was a collaboration with Manchester to target Gulf Cooperation Council countries. Early indications are that it has been successful and a bid is in to extend the model to China by partnering with Marketing Manchester, Marketing Birmingham and surrounding areas.

This project will introduce a new English tourism experience, pairing one of the world's must-see capital cities with a relaxing few days in the breath-taking English countryside. New travel packages will be sold via distributors in each country, making it easy for first-time visitors to book a trip to multiple destinations in England by removing barriers to intercity travel.

We have also forged an alliance with our counterparts in Paris to run a joint marketing campaign to encourage US visitors to visit both cities. Paris and London represent the two most popular city destinations in the world for American visitors,

sharing world-class heritage, history, culture and some of the world's most iconic tourist attractions.

Our new Visit London Official City Guide app is available on IOS and Android. The app provides timely and relevant content across culture, events, food, attractions, shopping and neighbourhoods, with 'must see', 'nearby' and 'near me' functionality enabling easy planning and booking.

The app allows visitors to create personalised maps and itineraries right across London, with the map available off-line. Over time, its developing personalisation will deliver experiences and offers tailored to individual users, and real-time data will help ease congestion by encouraging visitors to explore less busy areas of the city.

Improving visitors' food experiences

London & Partners will help visitors find food and drink experiences that suit their tastes by providing content and tools to support advance planning, as well as serving up real-time and location-based recommendations.

We will augment and optimise our food content on visitlondon.com and other channels. Dining experiences will be paired with cultural and special events to drive visitors to discover more of the capital's food offer.

The Visit London app has been designed to assist visitors when they are in London by providing food recommendations on the go. The app was the official app partner for the Evening Standard's London Food Month in June 2017.

Connecting Londoners and visitors

London & Partners works closely with Transport for London and Team London, the Mayor of London's volunteering programme. We will continue to collaborate with both organisations to build on the success of volunteering schemes that support major events and help visitors across London. We will also join forces with Team London to explore the feasibility of connecting Londoners and visitors with a digital tool designed to grow the volunteering programme and to support visitors with specific interests or requirements.



3. Focusing on infrastructure, technology and amenities

London & Partners is focused on promoting London's tourism offer. We work closely with City Hall, boroughs and business improvement districts to provide data and insight on tourist experiences so they might be improved through:

- investment in London's cultural infrastructure: maintaining the diversity and vibrancy of London's cultural offer – a key driver for visitors choosing London
- improvements to London's public realm in order to reduce congestion and improve the visitor experience
- a more comprehensive digital infrastructure, giving visitors easier access to information
- continually upgraded visitor amenities to improve the visitor experience

London & Partners will continue to invest in research and insights to understand and improve the visitor experience.

We will also explore new approaches. For example, we are piloting an online panel, Visitor Voice, to better understand our audiences, and investigating gathering insight from data and social channels in real time.

4. Developing London's MICE business

As London's convention bureau, we work with the industry to encourage and support meeting, incentive, conference and event (MICE) organisers to choose London for their event.

London & Partners would be well-placed to establish and support a London MICE advisory committee in partnership with government and key industry players. This committee would share best practice, improve coordination of the 'city welcome' for major congresses and events and make recommendations to the UK Government's Events Industry Board.

We will also work with national agencies to explore making an evidence-based case for greater investment in the industry and find ways to address capacity constraints.

Finally, we will expand our 'ambassador scheme' to engage academic and industry sector experts to champion London at home and internationally.

³³ VisitEngland's £40 million fund designed to promote English tourist attractions to domestic and international visitors



CONTACT

London & Partners is the Mayor of London's official promotional agency.

We exist to help London and Londoners benefit from the global economy. We promote London internationally to generate growth that supports the Mayor's vision of a city for all Londoners.

We do this by:

- building London's international reputation
- attracting international audiences and convincing them to choose London
- guiding international audiences to make the most of all that London has to offer, and helping Londoners to make the most of international promotion

We tell London's story brilliantly as the best place in the world to visit, work, invest, trade and study. We do this in partnership with organisations and people who have a stake in London's international promotion.

londonandpartners.com

London & Partners
6th Floor
2 More London Riverside
London SE1 2RR
londonandpartners.com
[@londonpartners](https://twitter.com/londonpartners)
info@londonandpartners.com

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