London's
Visitor Experience Strategy

October 2023

LONDON & PARTNERS

London's Visitor Experience Strategy

1. Introduction

This strategy forms the roadmap to deliver the 2030 London Tourism Vision. The vision sets the ambition of our industry to future-proof the city's visitor economy by delivering the best possible visitor experience. The better a visitor's experience, the more likely they are to return and recommend London to their family and friends. Word of mouth remains the most influential channel for people to choose where to visit.[1]

London is one of the greatest visitor cities in the world. It is ranked in the top three global destinations based on its visitor numbers. London, however, cannot rest on its laurels. The city has lower visitor satisfaction rates than competitors.

This matters because tourism underpins London's long-term prosperity. Visitors create jobs for Londoners, sustain businesses and generate taxes. They also support the culture, events and lifestyle that bring the city to life and improve the lives of Londoners. Visitors are critical to the way London projects its soft power globally - today's visitors are tomorrow's residents, students and business leaders.

London satisfaction versus competitor cities

It is little wonder competition is intense. Well-established competitors like New York, Paris and Rome continue to compete for visitors, while emerging destinations like Dubai and Singapore grow their market share each year.

Until now, London has had no visitor experience strategy. As a complex, global city with many stakeholders, this is not an issue unique to London. To date, it is smaller destinations such as Dubai, Amsterdam and Barcelona that are proactively transforming their destinations. More recently, global cities such as Paris are beginning to rethink the fundamentals of what makes their city a sustainable and attractive destination for residents and visitors alike.

This strategy views London's visitor experience through the eyes of its visitors and the key future trends that will shape global tourism. The strategy is underpinned by a range of data, from surveys through to behavioural data, to better understand a visitor's experience of the city. It sets out how, together, the city's visitor industry can deliver the shared 2030 Tourism Vision, ensuring London remains competitive for international and domestic visitors for years to come.

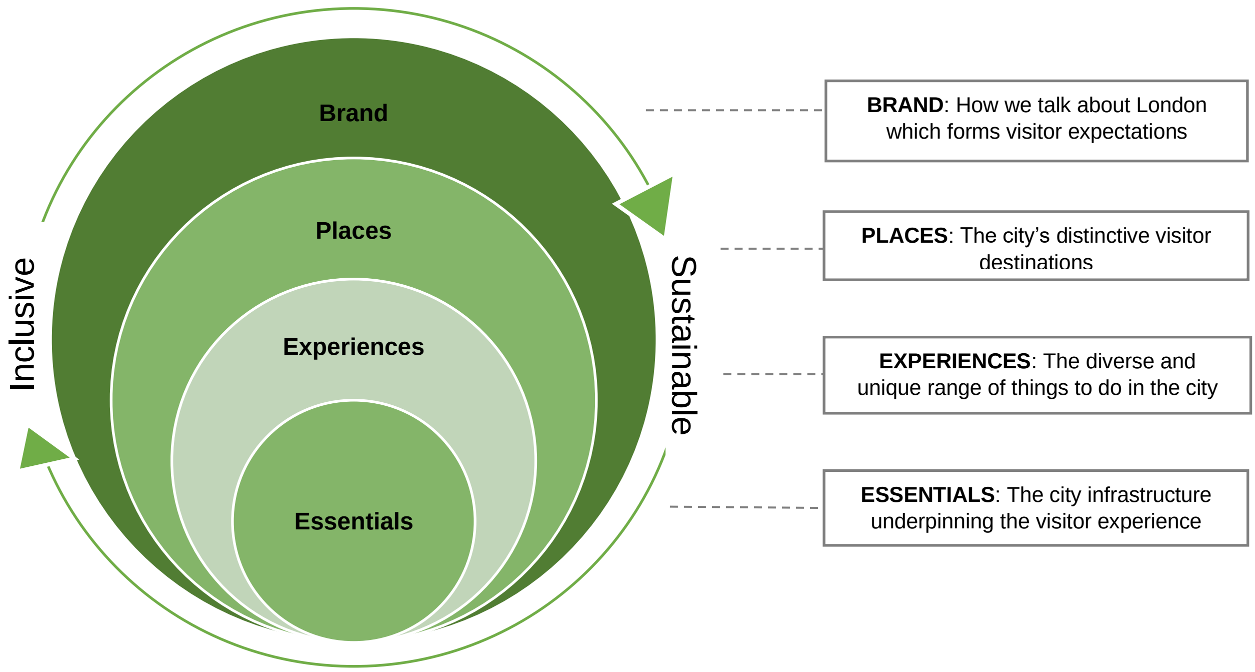
In some instances the market will provide for itself as it has to date. Here the strategy will bring a visitor perspective to existing activities, growing their impact and providing a city-wide perspective.

[1] Visit Britain MIDAS, 2022

There are also clear market failures, which only a city-wide approach can address. Here the strategy will bring together relevant stakeholders and use a data-led, open innovation approach to solve these city-wide challenges.

2. Executive summary

London's visitor experience strategy aims to improve a visitor's experience in London. The strategy is founded on four pillars which form a great visitor experience:



Underpinning these pillars is the visitor's mindset. Understanding why visitors travel and the experiences they seek will help us transform a good experience into a great experience. We will also consider major future trends, such as changing audience behaviours and technological trends, which will help future-proof the destination.

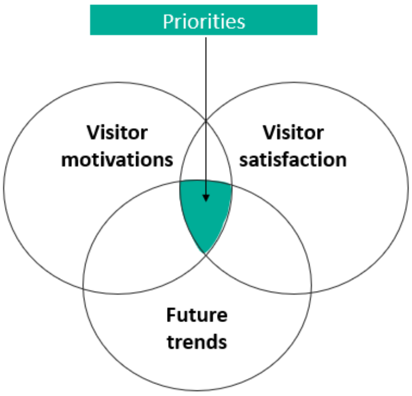
This strategy focuses primarily on leisure visitors, both domestic and international. Business visitors who stay for leisure are included, with research suggesting their leisure drivers are broadly similar to those of leisure visitors, although their expectations of certain experiences, such as hotel facilities, do differ.

2.1 Visitor experience priorities

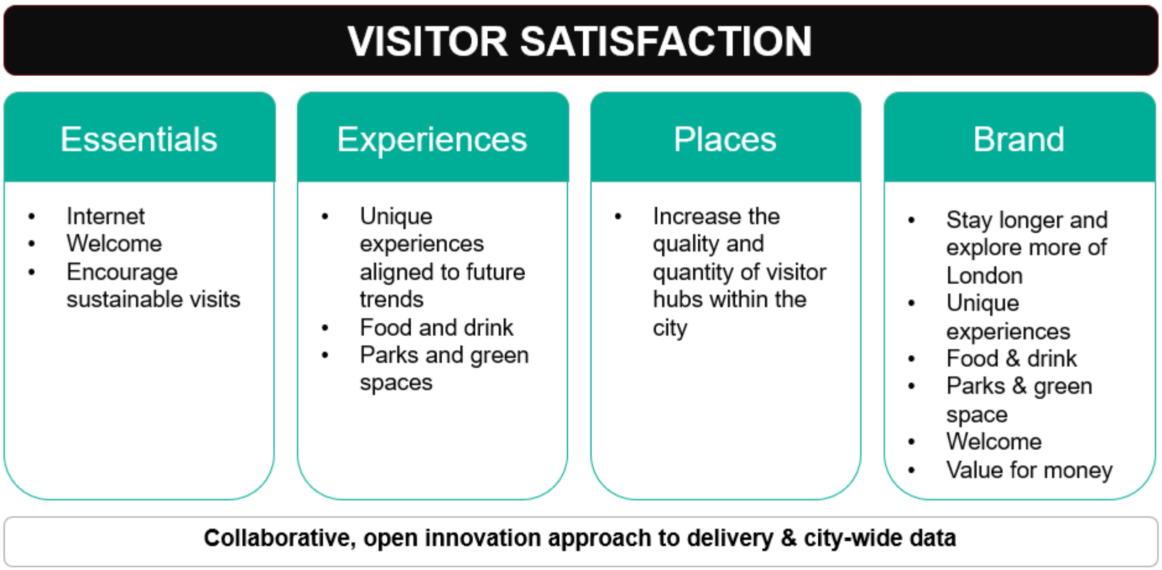
There are many things we could choose to improve across the four pillars of the visitor experience. This strategy focuses on London's strengths rather than trying to address weaknesses, many of which would be difficult to resolve. For example, London will never be competitive on price for budget travellers, and we should not try to be.

Priorities have been informed by:

- **Visitor motivations:** why do people travel and choose certain experiences?
- **Visitor satisfaction:** what do reviews tell us about London's current strengths and weaknesses from a visitor perspective?
- **Future-proof the London experience:** how will audience and technology trends influence tourism in the years ahead?



Summary: London's priorities to improve the visitor experience



Priorities at a glance

ESSENTIALS

Improve the visitor welcome
- London has low scores for visitor welcome which is a key driver of destination decision-making and visitor satisfaction.

Easy and effective city-wide internet access
- Internet access powers the visitor experience with information on-the-go.
- Less than one in two visitors can easily access wifi in the city.

Encourage more sustainable visits within London
- Simplify sustainable choices for visitors with a particular focus on active travel and encouraging 'tangible' sustainable behaviours to reduce the sustainability intention gap.

EXPERIENCES & PLACE

Strengthen and diversify the experience offer

- London's product offer is not seen as unique.
- Play to London's strengths, particularly food and parks, to develop new experiences across the city.
- Attract new and unique experiences aligned to future trends.

Increase the number of visitor hubs to encourage extended stays

- Extend a visitor's footprint across the city, by visiting some of the many new and emerging leisure hubs.
- Longer visitor stays will increase visitor satisfaction, consumer spend and carbon efficiency of visitors.

BRAND

Make London a welcoming city, famous for unique experiences, parks and food

- Address low perceptions of London as not welcoming and a city lacking unique and surprising experiences.
- Food and drink are a key destination decision driver and driver of satisfaction, but London's food offer is not perceived as a competitive strength.
- London's parks and green spaces are key strengths and can help position the city as a sustainable destination with opportunities to relax and recharge.

Encourage visitors to see more of London

- Extended stays will improve visitor satisfaction, consumer spend and carbon efficiency.

Promote London's value-for-money experiences

- Value for money is a key destination decision driver and indicator of visitor satisfaction.

LONDON
& PARTNERS

2.2 Delivering the strategy

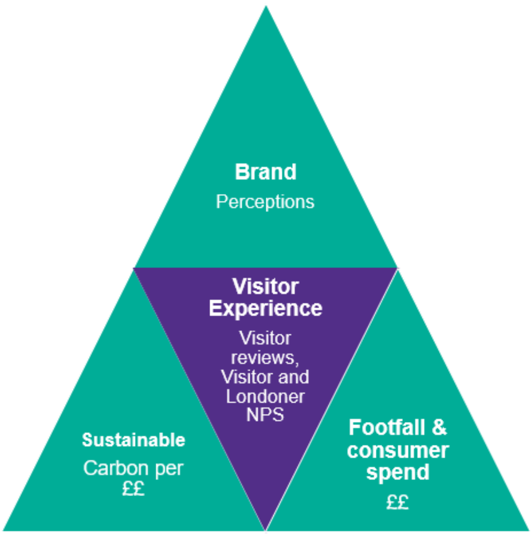
The industry is stronger as a collective, making prioritisation and collaboration essential to successful delivery. We will also use open innovation principles to invite key specialists to help us address the priorities.

<u>Delivery principles</u>

Audience first	Led by visitor data to understand a visitor's mindset
Impact	Ruthlessly prioritise projects that have a greater impact and are achievable
Play the long game	Innovation is not an overnight phenomenon. We will not be afraid to tackle big projects and take risks where required.
Nimble and affordable	Identify small, quick wins – not everything requires significant budgets.
Realistic	Some of these aims will require significant funding. For example, you can't improve the brand of a city with a small, one-off marketing campaign.
Collaborative	No single organisation can deliver a strategy alone. We are more powerful as a collective.
Open innovation	Work in sprints with a relevant ecosystem of stakeholders, local communities and delivery partners to deliver proof of concept beacon projects.

2.3 Measuring success

London does not currently monitor the visitor experience city-wide. Multiple organisations within the industry are buying the same data from the same suppliers. London should have a consistent and cost-effective, city-wide approach to data collection and insight generation.



In addition to capturing key visitor experience performance indicators, we will - for the first time - capture the carbon intensity of a visitor with the aim of increasing the economic impact of a visitor to London as measured against their carbon impact. We will also capture the impact of the visitor economy on Londoners, understanding the benefits and any challenges.

3. What is visitor satisfaction and how does London perform?

A great visitor experience starts with the visitor – how we satisfy their expectations and needs. Visitors must balance their core need to rest and recharge with the desire to discover – while maximising their time and the value of their visit. Visitors want to feel welcome. Convenience and ease of visit are a must. A great visitor experience should not rely on military planning, it should just happen, from the moment a visitor lands to the moment they leave.

Visitor satisfaction is based on:

1. **Visitor mindsets**: based on pre-existing perceptions that may differ from reality and which can be informed by the destination's brand
2. **Visitor experience**: how people engage with the destination and how this delivers against their expectations

3.1 Visitor mindsets

Visitors travel and choose destinations and experiences for a myriad of reasons. While these vary in rank by market and different audience segments, they are universal drivers which all visitors consider when choosing any destination.

1) Why people travel

Relaxing, resting, recharging	19%
Seeing famous sites	15%
Treating ourselves	13%
Visit family and friends	12%
Exploring, stimulating, learning	11%
Familiar and comforting	10%
Bespoke, unique and unusual experiences	10%
High energy action fill fun	10%

Visitor perceptions of London

Strengths

Weaknesses

Opportunities

2) Why people choose destinations

Offers good value for money	87%
Is a welcoming place to visit	87%
I can roam around visiting many types of places	85%
Is good for relaxing, resting, recharging	84%
There is beautiful coast and countryside to explore	84%
It's easy to get around once there	84%
Offers lots of different experiences in one destination	82%
There is a good variety of food and drink to try	81%
It's easy to get to	79%
It has experiences I can't have anywhere else	79%

3) Experiences visitors look for in destination

Experience coasts and scenery	70%
Explore local food and drink	70%
Visit famous attractions and places	64%
Explore history and heritage	61%
Experience countryside	58%
Visit parks and gardens	56%
Enjoy outdoor walks, hiking or cycling	56%
Experience city life	55%
Visit famous shops or shopping streets/centres	52%
Enjoy fine dining experiences	52%
Visit museums or galleries	51%

[2]

London performs strongly for many visitor mindsets. However, there are clear opportunities to improve. Visitors travel to relax and while London is a busy global city, it is also the world's first National Park City, with parks and green space accounting for more than a third of the city. Similarly, perceptions of food and drink in London are lower for visitors than for

[2] Visit Britain MIDAS, 2022. Perceptions of London = various.

Londoners, and there is an opportunity to build on this strength to attract and satisfy more visitors.

3.2 Current visitor satisfaction

The city's visitor satisfaction is high but below that of competitor cities. London ranks ninth when compared to 10 competitors using customer review data.

The city has a good, but not excellent, Net Promoter Score (NPS) of 43 from visitors[3]. NPS scores vary by industry but a score of 50+ is considered excellent and 70+ world class.

NPS also varies considerably depending on where a visitor is from. Domestic audiences give London an NPS of 37 compared to 57 for US visitors.

Satisfaction improves the longer a visitor stays. 57% of visitors rated their experience as 'very good' if they stayed for four to seven nights compared to 36% staying one to three nights[4]. Satisfaction also varies by the types of experiences visited in the city. This is explored more in Section 7: Experiences.

[3] London & Partners visitor satisfaction, 2023
[4] London & Partners visitor satisfaction, 2023

4. Visitor essentials

A holiday is meant to be relaxing and a treat, not an exercise in project management. Convenience, ease of getting around and a city's welcome are essential foundations to a good visitor experience[5]. Visitor essentials matter. Navigating the city was the number one factor for recent London visitors who stated that they were highly satisfied with their visit.

A city with world-class experiences will not satisfy visitors if they face barriers accessing the experiences. London must satisfy a visitor when they are in task mode, be it planning their day, navigating the city, feeling welcome, being more sustainable, or getting value for money. A well-functioning London visitor infrastructure is therefore vital in delivering a world-class visitor experience.

4.1 High-priority visitor essentials

4.1.1 Sustainable visits

The tourism industry must play its role in helping London achieve its net zero targets and meet increasing visitor demand for more sustainable experiences. There is a lot London can do to reduce the carbon intensity of a visitor by providing more sustainable experiences and encouraging visitors to adopt more sustainable behaviours in destination. This is explored more throughout this strategy and sustainability is looked at in detail in *Section 10: The future visitor experience.*

4.1.2 A welcoming city

Feeling welcomed is the joint number one destination decision driver globally. 87% of audiences cite this as the primary consideration when choosing a destination. It is also one of the key drivers of a high satisfaction score when in London[6].

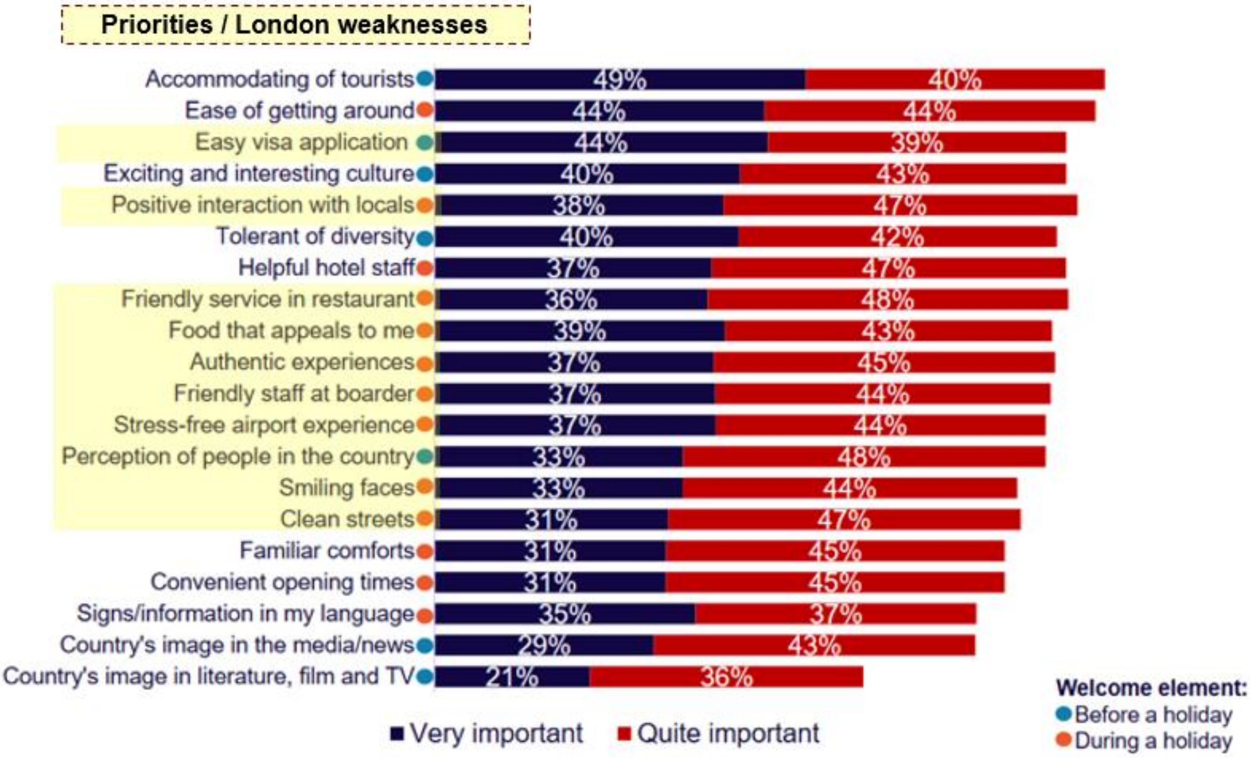
London scores low for visitor welcome. 53% of international visitors think the city is welcoming compared to 74% of UK visitors[7]. In 2022, the UK ranked 16th out of 60 global destinations for welcome. Key markets of China, Saudi Arabia, France and Germany ranked the UK welcome lower still, with ranks varying between 23-27.[8] For EU visitors, this is a long-standing issue predating Brexit.

UK (domestic) visitors to London feel less welcomed than international visitors. Visitors who stay longer are more likely to feel more welcomed, with more time to enjoy and get to know the city[9].

---

[5] Visit Britain MIDAS, 2022
[6] London & Partners visitor satisfaction, 2023
[7] Visit Britain London destination report (2015-2018)
[8] Anholt-Ipsos Nation Brands Index
[9] London & Partners visitor satisfaction, 2023

Visit Britain welcome indicators[10]



Four of the top six 'welcome signals' are important before a visitor begins their travels, demonstrating the value of a strong visitor welcome in London's promotion.

Broader issues such as the removal of VAT free shopping in London could also have an impact, demonstrating that London is less welcoming to visitors than some competitor destinations. Good customer service throughout the customer journey (airports, hotels, experiences) also ranks highly, as well as a destination's product offer, particularly for food and authentic experiences.

Visitors to the UK often discover it to be easier, more affordable and welcoming than expected.[11] This perception gap shows the potential to leverage the experiences of recent visitors to demonstrate how welcoming the city actually is.

[10] Visit Britain Welcome research
[11] Visit Britain MIDAS research 2022

4.1.3 Internet access

Access to visitor information plays a critical role in the visitor experience. Without it, visitors cannot easily find things to do or navigate the city.

This can be a challenge for international visitors to London who cannot easily connect to the internet, a barrier which has increased since the UK left the EU and mobile data roaming charges increased for EU visitors.

1st search result for "London visitor Wi-Fi".
Source: Google

> For such an international city, the public wifi in London is *severely* disappointing.
>
> It isn't like many other international cities where you can hook into public wifi at nearly every cafe, restaurant, and museum.
>
> You have to *work* for your wifi in London, and it gets *frustrating* at times.

Less than one in two visitors to London strongly agree they could access good wifi during their trip. London scores 6.2/10 for internet in customer reviews compared to a benchmark of seven. Ease of internet access, speed and security are essential.

Visitors either must use expensive mobile data, buy a local SIM card and unlock their phone, or purchase expensive mobile wifi. Many businesses in London provide customers with access to free wifi. There are also pockets of excellence throughout the city. The City of London has free wifi access and Bankside also has free on-street wifi stations. Transport for London provides wifi across 260 stations and on certain Underground lines.

Despite this abundance of potential connectivity, each wifi access point requires the visitor to individually find and connect to each network. Relatively simple solutions may already exist. For example, OpenRoaming is a wifi framework enabling automatic connection to any wifi network signed up to the framework. This could create a 'connect once, access anywhere' city-wide wifi network. A visitor could connect once at Heathrow and their phone would automatically connect to other networks throughout the city.

4.2 Lower priority visitor essentials

The following visitor essentials are lower priority. We must continue to build on London's strengths and work on its weaknesses, but they are not immediate priorities for this strategy.

Transport and navigation	● Satisfaction with transport in London is high, with a satisfaction score of 9/10 compared to 8.8 for competitors.[12] ● Four in five visitors believe transport provides value for money.[13] ● The network scores high for personnel, ticket offices and hygiene.[14] ● Notable area for improvement: toilets, where satisfaction levels are significantly below competitors ● Payment is a potential pain point for visitors without contactless cards, however most visitors choose to pre-pay for transport using a visitor Oyster Card. ● Signs in a visitor's own language is a pain point for markets such as China and GCC countries, however this doesn't impact overall visitor satisfaction ● More could be done to promote active travel in the city to encourage more sustainable behaviours.
Visitor information	● Visitor satisfaction with finding information before and during the trip is very high.[15] ● 87% of visitors to London are satisfied with the availability of information pre-trip (compared to 69% of visitors to the UK) and 83% are satisfied with the availability of information when in destination (69% nationwide). [16]

[12] TCI visitor research using customer review data, 2023
[13] London & Partners visitor satisfaction, 2023
[14] TCI visitor research using customer review data, 2023
[15] VB London destination report (2015-2018)
[16] VB London destination report (2015-2018)

Airports	● No London airports are in the top 20% for visitor satisfaction, comparing airports of similar sizes in Europe[17]. ● Gatwick ranks ninth out of 19 European competitor airports for overall visitor satisfaction[18]. Heathrow's satisfaction score was 4.2 out of 5 in 2019[19]. ● Satisfaction with airports is low compared to competitors, scoring 7.3 compared to a benchmark of 8.2[20]. ● Areas for improvement: toilets, facilities, internet, transport and sustainability. ● Strengths: food, personnel and atmosphere. ● Travel to and from airports could be more sustainable, with only 40% of passengers using public transport[21].
London as a gateway to the UK	● 15% of London visitors currently travel elsewhere in the UK[22] and these visitors are more likely to report higher satisfaction with their trip to London than visitors who only stay in London. ● 60% of London visitors know little about travelling outside of London despite being very interested in exploring the rest of the UK.[23]
Accessibility	● 90% of disabled visitors are happy/neutral with quality and ease of access to accessibility information[24]. ● 80% of recent visitors with accessibility requirements felt their needs were met[25]. ● There is work to be done. London's NPS for disabled visitors is +40 compared to +47 for non-disabled visitors[26].

[17] ASI ASQ Awards
[18] Gatwick ASQ performance reports 2019
[19] Heathrow annual report 2019
[20] TCI visitor research using customer review data, 2023
[21] Heathrow Surface Access report, 2022
[22] London & Partners London Plus research
[23] Visit Britain Beyond London study, 2013-2017
[24] GLA Game Changer report (2012)
[25] London & Partners visitor satisfaction, 2023
[26] London & Partners visitor satisfaction, 2023

Inclusivity	• 92% of travellers think it's important for travel providers to meet the needs of all travellers. [27] • Yet only one in two visitors see options that are inclusive of all types of travellers when booking their trip.[28] • 70% of visitors are willing to pay more for travel options that are inclusive to all.[29] • London and Britain are considered LGBTQ+-welcoming and safe, outperforming most European competitors.[30] • We must continue to build on this reputation as there is still work to be done. Only two in three international visitors consider the UK to be open-minded.[31]
Value for money	• London is a premium destination and is regularly added to lists of expensive cities to visit. • London benchmarks competitively against European cities. It is cheaper than Paris, Amsterdam and Dublin, and competitively priced against other popular destinations like Berlin, Rome and Barcelona[32]. • 74% of recent visitors stated London was less expensive than they had thought pre-trip. [33] • While the priority is attracting higher value visitors who generate greater economic benefit combined with a lower carbon intensity per pound spent, it remains important to continue to promote affordable visitor experiences.
Public toilets	• Public toilets are in short supply and the number has been declining in recent years. • 60% of London's high streets do not provide public toilets[34]. This impacts all visitors, particularly older visitors or those with health considerations. 90% of these audiences consider toilet accessibility when planning a trip. • Many people prefer to use toilets in local businesses rather than public toilets due to concerns about cleanliness. London's tourism businesses score 6.6/10 for toilets compared to the 7.8 benchmark[35]. • On public toilets there is no simple solution. They are expensive to maintain. • London's leisure industry can work to improve the quality of its own toilet provision.

[27] Expedia, Inclusive Travel report
[28] Expedia, Inclusive Travel report
[29] Expedia, Inclusive Travel report
[30] Visit Britain LGBTQ travel to Britain, 2020
[31] Visit Britain Inbound Consumer Sentiment, 2019
[32] Post Office Travel Money City Costs Barometer, 2023
[33] London & Partners visitor satisfaction, 2023
[34] Age UK, London Loos report, 2022
[35] TCI visitor research using customer review data, 2023

Access and distribution of London's experiences	• In developed markets such as the UK and US, London's experiences are easily accessible, from the iconic to the lesser known, outer London experiences. • This is not always the case in less established markets such as China and GCC. There is also a post-Covid need to re-establish travel trade connections, particularly in China. • London's ticket offices have lower visitor satisfaction than those in competitor cities, with a score of 6.4/10[36]. • Visitors want more flexibility to change ticket bookings. 78% of London's experiences provide free cancellation compared to 84% for Paris and 90% for Rome[37].
Safety	• London has ranked ninth[38] and 15th safest city in the world[39]. • Three in four visitors to the UK consider it a safe destination[40] demonstrating that, while not a destination priority, there is an 'always-on' need to reassure visitors who are less familiar or less confident about visiting a new city.
Industry readiness	• The most pressing challenge to overcome is the talent and skills shortage in the hospitality sector, which is at times preventing the industry not only from improving, but from delivering a basic customer experience. This is illustrated in lower review scores for London's customer service when compared to competitor cities. • Many of these issues need to be tackled at a national level to ensure both the migration and skills policies fulfil the needs of the tourism sector. For example, tighter migration policies mean fewer hospitality staff speaking multiple languages to welcome visitors. • UK Hospitality already has a national skills strategy to address workforce shortages in the sector. • Visitors from high-growth markets such as China and GCC have lower satisfaction rates and is one area where the industry can improve, bolstering the collective understanding of expectations, and of the cultural, language, payment, and technology requirements of these markets.

[36] TCI visitor research using customer review data, 2023
[37] Booking.com search results, June 2023
[38] Berkshire Hathaway Travel Protection, 2023
[39] Economist Safe Cities Index, 2021
[40] Visit Britain Inbound Visitor research, 2019

5 Experiences

London's diverse choice of experiences help drive visitor satisfaction. While the city's many attractions draw people from around the world, visitor satisfaction is lower than our competitor cities, with London ranking ninth when compared to 10 competitors.

In addition to improving current experiences, there is also the opportunity to improve the perception of London as providing 'unique and surprising experiences' – key destination decision drivers for which London has a low score.[41] This could be through new product development or encouraging visitors to explore more of the city to discover some of its unique attractions.

Lastly, changing audience and technological trends also need to be considered. Visitors are increasingly focused on their personal wellbeing and the sustainability of their visit. Technology will also play a key role, and London must future-proof activities and attractions by using technology to enhance the physical experience. Future trends are detailed further in *Section 10 - The future visitor experience.*

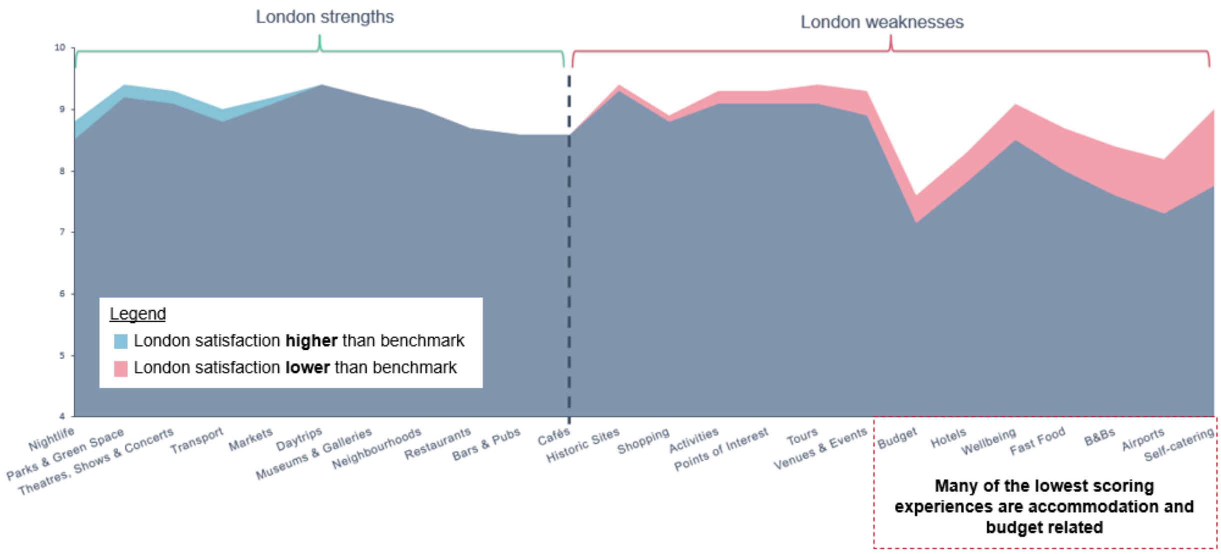
What kind of experiences do visitors look for when on (any) holiday?[42]

Experience	% of audience
Experience coasts and scenery	70%
Explore local food and drink	70%
Visit famous attractions and places	64%
Explore history and heritage	61%
Experience countryside	58%
Visit parks and gardens	56%
Enjoy outdoor walks, hiking or cycling	56%
Experience city life	55%
Visit famous shops or shopping streets/centres	52%
Enjoy fine dining experiences	52%
Visit museums or galleries	51%

The above table helps us prioritise types of experiences. We must play to the city's strengths. For example, as a city destination London cannot offer coasts, but has abundant scenery and green space, more than most other cities in the world.

[41] Visit Britain MIDAS, 2022
[42] Visit Britain MIDAS, 2022

Satisfaction with experiences



Food and drink scores well compared to competitors, but more could be done to make food experiences a key London strength given the importance of food and drink as drivers of both the destination decision and visitor satisfaction. The strength of parks and green spaces is an opportunity for London to establish this as a key USP, a "tangible sustainable experience" that aligns with key trends in sustainability and wellbeing.

London's nightlife is a top strength compared to competitor cities. It is important we maintain this strength, however nightlife is not a priority focus area for this strategy as it is not a key destination decision driver nor a top destination experience sought by visitors.

Four of the seven lower scoring areas for London can be linked to cost (budget accommodation, fast food, B&Bs and self-catering). However, this should not be a focus for London. The city is a premium destination and unlikely to be a competitive, budget destination. Value for money messaging is important at all price points and the industry's priority should be delivering a high satisfaction experience for higher value visitors.

The next sections look at each experience in detail, using aggregated customer review data to better understand strengths and weaknesses in London's current experience offer.

Customer service

London's customer service is viewed as a strength by visitors although review scores are lower than benchmark cities. A lack of personnel continues to threaten the tourism sector and risks impacting the level of customer service. Even when London's experiences are open to visitors, 45% of operators report closing early due to staff shortages[43]. There were 159,000 job vacancies across the accommodation and food services sector between July and September 2022, up 5.7% year-on-year[44]. Satisfaction with accommodation has been particularly impacted post-Covid, a trend seen in competitor cities as a result of hospitality

[43] UK Hospitality, 2022
[44] Office for National Statistics

workforce shortages. It is essential London continues to support UK Hospitality's workforce strategy.

A note on terminology and culture

Many placemaking strategies focus on "culture" as a driver of growth and satisfaction. However, the definition of what constitutes culture is not consistent and can create confusion. Taking a visitor-first approach, this strategy focuses on experiences. This encompasses culture and goes beyond, including history, food, shopping, parks, nightlife, live events, attractions and accommodation. This broader focus better aligns with how visitors choose experiences.

5.1 High-priority experiences

5.1.1 Attractions

London's attractions, museums and galleries are top experiences sought by visitors, and a significant reason why people choose to visit London[45]. Customer reviews for attractions are high at 9.1/10 and competitive with benchmark cities. Historic sites, museums and galleries are particularly strong. Value for money also scores highly. Areas where customer satisfaction is lower includes toilets, internet access and the ticket office.

Two in three visitors strongly agree that London has a wide variety of attractions and that attractions are unique. This demonstrates both the strength of the offer but also room for improvement, both in the awareness of existing unique products and the development of new products. Many visitors do not explore a large proportion of the city and so are not aware of the unique attractions that exist beyond central London or the top “bucket list” attractions.

Attraction opening hours is also a weakness. Visitors expect attractions to be open until 8pm[46] however seven of London’s top 10 paid attractions and eight of the top free attractions close between 5 and 6pm.

London’s product development strategy should focus on identifying unique attractions which:

- Help encourage visitors to see more of the city beyond central London to discover more unique experiences that may not necessarily be associated with London, for example white water rafting in the Lee Valley or historic mansion houses around Hounslow.
- Are aligned to future audience trends. For example, one in two people regularly play computer games and a third of all Gen Zs have watched an esports tournament[47]. How can London develop products to excite the next generation of travellers? And with the growth in wellbeing, how can London provide attractions which help people relax and unwind in the city beyond a traditional spa break?

5.1.2 Food and drink

Food and drink are a key driver of both the destination decision and visitor satisfaction. Satisfaction with London’s food and drink is equal to that of competitor cities. However, of all London’s experiences, food and drink has the lowest scores, with value for money and the uniqueness of the offer scoring particularly low. Given food and drink is the number one experience sought by visitors, improving visitor satisfaction what’s on offer should be a priority.

[45] London & Partners visitor satisfaction, 2023
[46] London & Partners visitor satisfaction, 2023
[47] GWI, Gen Z Report and Entertainment reports, 2020

Despite London's wide range of cuisine, visitors are more likely to search for English cuisine (60%) with street food (50%) and cafés (49%) the next most popular[48]. This demonstrates a need for a two-pronged approach to food: delivering quality English food experiences but also changing perceptions about London's food offer, which is one of the most diverse in the world.

While we would hope every meal is viewed as an experience to be savoured, visitors can also be time poor and so a meal becomes a pitstop in a busy itinerary. It is perhaps this food experience that London needs to improve the most. Satisfaction with London's fast food offer is lower than the benchmark. Fast food shouldn't be a synonym for fatty food, especially with a growing focus on personal wellbeing and health.

5.1.3 Parks and green spaces

Relaxing and recharging is a key driver of destination decision-making and visitor satisfaction. This is likely to grow in importance as visitors become increasingly mindful about their own wellbeing and the sustainability of the destinations they visit.

While London is a busy city, it is blessed with more green spaces than many competitor cities, with almost half of the city classified as green or blue space[49]. The city has 3,000 parks, more than any other European city[50], and has been named as the world's first National Park City[51]. This creates the perfect opportunity to help visitors to relax and recharge.

Satisfaction scores with London's parks and green spaces are the highest out of all experiences in London, scoring 9.4/10 and higher than competitor cities. Visitors who go to a park are also more likely to be happy with the sustainability of their experience. Parks can therefore act as a tangible sustainable experience, increasing a visitor's perception of the city as a more sustainable destination.

Green spaces also provide an opportunity to diversify London's visitor experience offer, with unique experiences such as white water rafting, climbing, gardening, wildlife protection and wakeboarding already available. Green spaces can also help attract visitors to other areas of the city. London has several wetland areas including Lee Valley and Epping Forest, which are just a short train ride away.

[48] London & Partners visitor satisfaction, 2023
[49] GLA Green spaces scoping paper, 2014
[50] Nerd Wallet Study, 2022
[51] National Geographic, 2019

5.2 Lower priority experiences

The following experiences are lower priority. We must continue to build on them, but they are not immediate priorities for this strategy.

Accommodation	• Accommodation scores 7.8/10 compared to an 8.3 benchmark, the lowest rating of all of London's experiences[52]. • Accommodation scores lower for almost all indicators with key areas of focus including rooms, food, facilities, customer services, value for money, cleanliness and sustainability[53]. • Satisfaction increases the more a visitor pays, suggesting London's more expensive accommodation is providing good value but also that the quality of supply for budget accommodation could be improved. This is supported by customer review data with budget hotels scoring 7.2/10 compared to an average score of 7.6 against benchmark cities. Budget hotels score lower for rooms, facilities and service[54]. • Accommodation should not be a priority of this strategy given the strategy's focus on higher value visitors where accommodation satisfaction is higher. Accommodation should be a consideration as part of developing new visitor hubs in London and ensuring adequate supply of visitor accommodation in these areas.

[52] TCI visitor research using customer review data, 2023
[53] TCI visitor research using customer review data, 2023
[54] TCI visitor research using customer review data, 2023

Shopping	• Shopping is less likely to be a destination decision driver and is the ninth most popular experience type sought by visitors when in destination[55]. However, visitors who shop are more likely to highly rate their visit. • 96% of visitors go shopping during a holiday and one in five spend more on shopping than any other activity[56]. • London's shopping satisfaction is competitive with benchmark cities. Strengths include customer service and food. • Value for money scores 7.4/10 versus 8.3 for competitors. Policy changes such as tax-free shopping could help improve this score[57]. • Other areas for improvement: internet, toilets, transport, sustainability and the shopping offer not being unique. • Visitors are looking for high street shopping, souvenirs, and British artisan goods. There is a gap between those wanting and finding artisan products[58]. • Only one in two people go shopping with the primary goal of making a purchase[59.] Global retail trends are moving away from a task-based view of retail to buy products, towards retail as an experience. • This is an opportunity for London's product development strategy to help the city's retail offer lead the way as the home of experiential shopping, where visitors not only shop, but have unique experiences with some of the world's best-known brands and those unique to London and the UK.
Activities and tours	• Activities and tours satisfaction is competitive. Scores for day trips are particularly high at 9.4/10. Visitors who take a day trip or overnight trip from London are more likely to be satisfied with their overall experience of London[60]. • The product availability of day trips from London is limited to classic destinations or attractions such as Stonehenge, Windsor, Bath and the Cotswolds. There is an opportunity to consider other package trips particularly to popular coastline attractions such as Brighton or the iconic cliffs of Dover, given coast and countryside is the number one destination decision driver for international visitors. • UK visitors are less likely to be satisfied with activities and tours in London which suggests the product offer could be broadened to appeal to domestic audiences[61]. • Satisfaction with the internet, toilets and sustainability is lower than benchmark cities. • Value for money also scores lower, however this doesn't impact the overall satisfaction scores.

[55] Visit Britain MIDAS, 2022
[56] TripAdvisor – An economic portrait of a traveller
[57] TCI Visitor Satisfaction, 2023
[58] London & Partners visitor satisfaction, 2023
[59] Gensler Experience Index
[60] London & Partners visitor satisfaction, 2023
[61] TCI visitor research using customer review data, 2023

Events	● Events play an important role in bringing London's brand to global audiences, animating London and bringing places and experiences to life. Animating a city makes it a more attractive destination for people which can underpin economic growth and attract new investment, more visitors and more students. ● Major events have enormous broadcast reach and can help London to promote its brand and key messages. ● Satisfaction with London's events is high. Theatre is highly rated, scoring 9.3/10 compared to 9.1 for benchmark cities[62]. ● Value for money at the city's venues and events is significantly lower than the benchmark. ● Areas for improvement are toilets, internet access, ticket offices and food.
Nightlife	● Nightlife ranks relatively low for visitor destination decision drivers and experiences sought in destination[63]. ● Satisfaction levels are high with four in five visitors satisfied with London's nightlife, product offer and transport[64]. ● Customer reviews for London nightlife are significantly stronger than benchmark cities (8.8 versus 8.5) but relatively weaker when compared to other experiences (e.g. London's attraction score of 9.1). ● There is limited visitor expectation of a 24/7 city. Extended opening hours of daytime experiences are the priority for visitors. Extended opening hours help extend a visitor's day, with greater access to the experiences on their wish list. 90% of visitors expect experiences to be open until at least 8pm[65]. ● A visitor's nightlife experiences are more likely to focus on socialising than alcohol[66]. ● Cost and information accessibility are barriers to visitors engaging in more night-time activities, however customer reviews suggest London's nightlife provides good value for money compared to competitors[67].

[62] TCI visitor research using customer review data, 2023
[63] Let's Do London 2022 (domestic) and Visit Britain, MIDAS, 2022 (international)
[64] GLA nightlife plan, 2018
[65] London & Partners visitor satisfaction research 2023
[66] GWI, Gen Z audience report, 2019
[67] GLA nightlife plan, 2018

6 Place and placemaking

A thriving visitor destination contributes to the local economy and brings a destination to life for residents and small businesses, contributing towards tangible infrastructure that is accessible to all. There are also potential trade-offs between visitor and resident experience. A great visitor destination should not come at the expense of Londoners.

London is fortunate in its scale compared to many rival cities such as Paris, Amsterdam and Barcelona. London is a city of villages where residents and visitors can coexist. The city is blessed with world-class visitor destinations such as South Bank, Soho and Greenwich, which have clear identities and are visitor destinations in and of themselves. The city's visitor offer continues to evolve with new destinations such as Kings Cross, Nine Elms and East Bank, along with the transformation of destinations such as the City of London. There are also countless development opportunities in the capital where a visitor strategy can help animate new destinations.

Yet for all of London's many wonders, visitors are still concentrated in central London, which accounts for 90% of international visitor spend and 60% of domestic visitor spend. Encouraging visitors to stay longer and to see more of the city will increase satisfaction levels given those who stay longer are more likely to be highly satisfied.

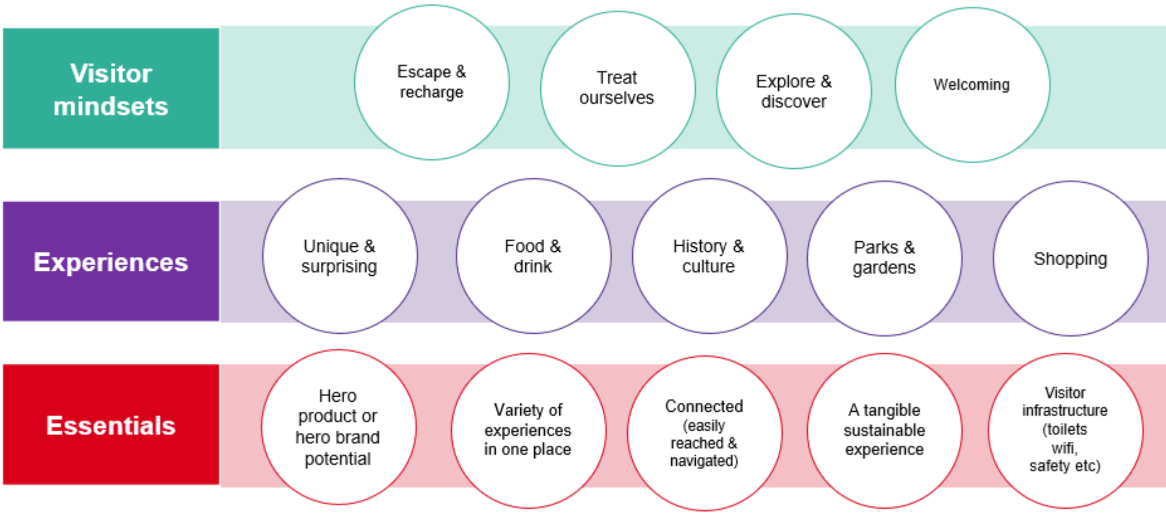
<u>What makes a great visitor destination?</u>

A sense of place plays an essential role in defining visitor satisfaction. Visitor hubs must put the visitor at the heart of their strategy. Places must be more than somewhere people pass through to get to specific experiences. Places must satisfy core visitor needs with a diverse offer of experiences, including hero attractions, excellent food and drink and places to relax. A place must address basic visitor needs and be welcoming, safe, accessible, relaxing, and easy to get to.

To guide stakeholders and placemakers, the visitor placemaking framework below uses visitor mindsets and future audience trends to define the key criteria required to build a great visitor hub[68].

[68] Visitor mindsets based on future audience trends, products based on VB MIDAS data, Essentials = multiple sources including VB and L&P visitor satisfaction research

Placemaking framework – what makes a great visitor hub?



Place branding: a city of villages

The visitor experience is highly influenced by a visitor being able to fit all of their wish list into a time-limited stay. This presents a challenge to London in how to position the city's enviable array of places simply to a visitor. London's places must build their own distinct brands and avoid the risk of becoming a series of "cultural quarters" which have no distinct identity.

Place brands are more likely to be successful if built on the identity of their community and if the brand values are matched by the experiences provided. This authenticity is central to a successful place brand, building on a place's existing spirit or community rather than displacing it. For example, Camden's brand is built on its punk and alternative heritage, or Soho, famous for its nightlife and being the heart of London's LGBTQ+ community, or Brixton known for its nightlife and Afro-Caribbean heritage. Marketing alone can only go so far in building a place brand – it is the experiences and local community which deliver the brand promise.

For emerging visitor hubs already providing an excellent visitor offer, improved branding could be the key. Little Italy is a key visitor destination in New York and the place brand helps put the area on the map. Green Lanes in Haringey is home to a large Turkish community and many top-rated Turkish restaurants, but is little-known beyond north London. A simple branding strategy could provide the hook to help turbo-charge the area's visitor appeal.

Developing a distinct destination brand shouldn't limit the visitor experience available at a destination. 94% of visitors to a place do multiple activities when visiting[69]. Covid also highlighted the lower resilience for single purpose destinations such as central business districts. For example, a place may decide to become famous as a wellness destination, but it also needs to ensure it provides a wider range of visitor experiences to complement this, from excellent food and drink options to shopping.

[69] Gensler Experience Index

A city-wide approach to placemaking

Attracting visitors is a key objective of many of the city's 70+ Business Improvement Districts (BIDs) and the city's 32 boroughs and the City of London Corporation. We must continue to support a coordinated approach across London, sharing best practice and economies of scale. For example, many organisations in London commission the same suppliers for similar data to inform placemaking strategies. This presents an opportunity to form a city-wide data programme which is visitor-specific and could build on existing platforms such the Greater London Authority's London Data Store and High Streets Data project.

At a policy level, there are already many policies being developed which are relevant to visitors but do not always consider a visitor perspective. For example, a plan to improve open access wifi for residents can also be applied to visitors. For developers and landowners, the consideration of attracting visitors is hit and miss, quite often a by-line in a strategy with the ambition to attract visitors, but without fully considering how this might be achieved.

Key place challenges

1. How do we better differentiate and brand London's places so they are clearly defined and attract visitors, helping to disperse visitors geographically across the city?

2. How do we ensure that current visitor hubs drive high levels of visitor satisfaction and provide experiences aligned to future audience trends?

3. How do we create and develop new places to become visitor destinations that benefit the city and its residents, as well as visitors?

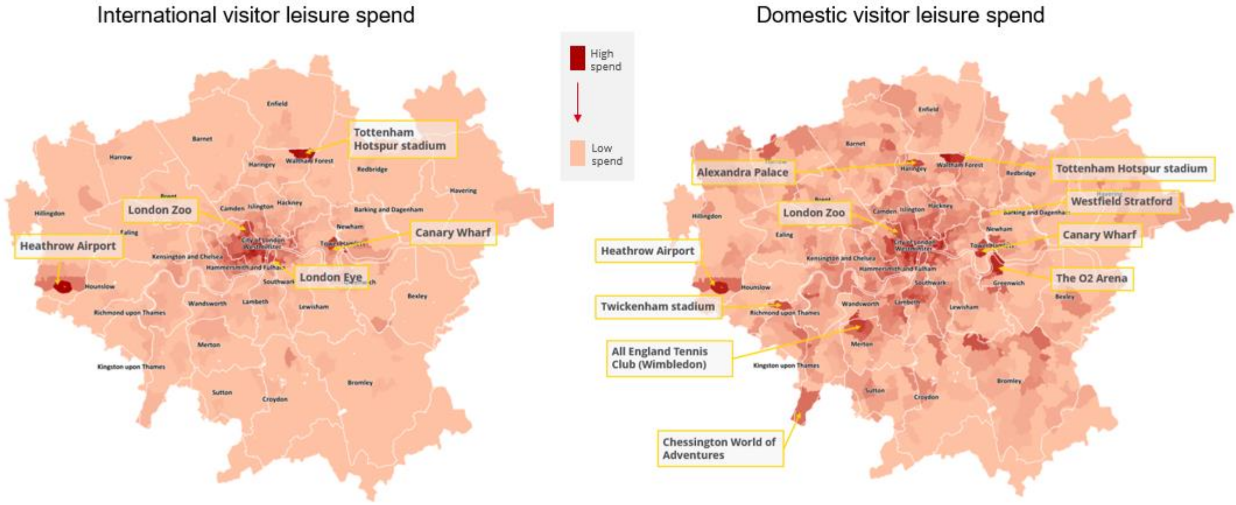
The following sections review London's current and future visitor hubs, understanding visitor satisfaction levels and identifying opportunities to improve the visitor experience.

6.1 London's visitor hubs

London has a diverse array of visitor destinations, yet visitors only see a very small percentage of the city. International visitors largely stay in central London and rarely venture beyond this. Domestic visitors explore more widely, perhaps because they are more comfortable doing so or they are influenced by friends and family.

Visitors will always go to the must-see attractions and may be limited by time. London's challenge is to attract and encourage visitors who are more likely to stay longer and explore more of the city.

<u>International and domestic visitor leisure spend in London</u>[70]



There are pockets of high visitation, for example the new Tottenham Hotspur Stadium is driving significant spend in north London. The multi-purpose stadium offers a diversity of experiences beyond football, providing everything from go-karting, adrenaline experiences, rugby, NFL and internationally renowned music concerts from the likes of Beyoncé and the Red Hot Chili Peppers. This "hero attraction" demonstrates the importance of providing a diversity of experiences and provides the borough of Haringey with an excellent foundation on which to attract more visitors.

This demonstrates how creating compelling visitor experiences can attract visitors to destinations beyond Zone 1. Presenting London with a significant opportunity to grow a visitor's footprint across the city, prioritising initially a domestic audience who are more likely to explore more of the city.

<u>Visitor satisfaction</u>

Customer review data provides another lens through which to identify high-performing visitor destinations and experiences – both those already being visited, and the city's hidden gems which have excellent review scores but relatively low visitor volumes. While outer London has lower satisfaction rates than central London (8.1 compared to 8.6), it is seen as better

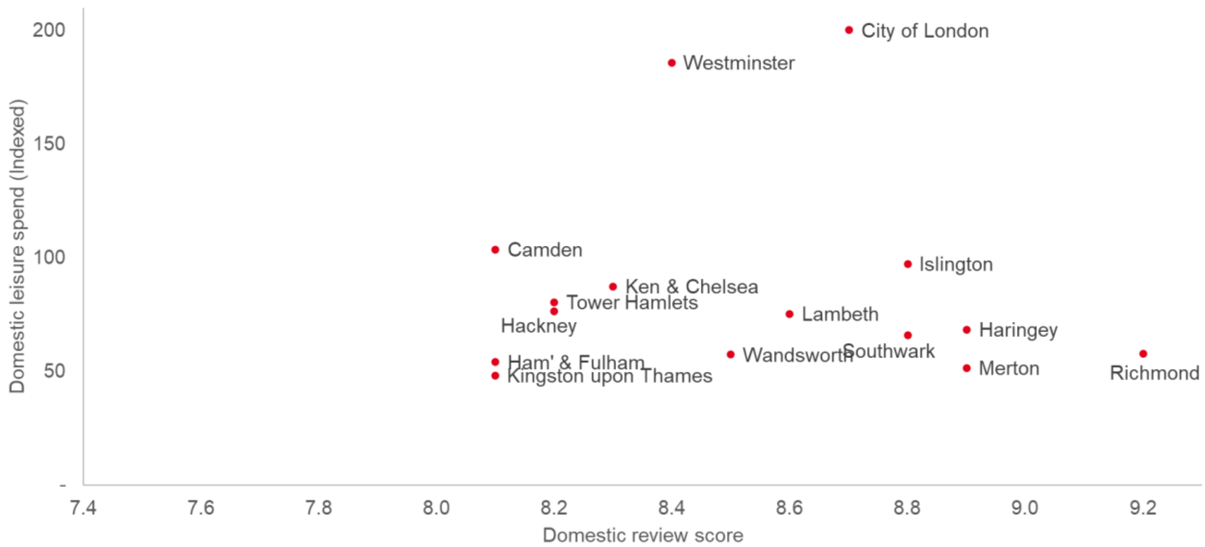
[70] Colliers / Mastercard spend data 2022

value for money and scores much higher than central London for atmosphere, perhaps because of a more relaxed, local environment.

More work is required to map London using visitor spend and satisfaction data to provide a more detailed level of insight. Visitors do not see London through the lens of borough boundaries, but rather as distinct visitor districts. The charts below therefore illustrate how using such data can help inform a city-wide place strategy. Even at a top level, this data also demonstrates:

- Satisfaction with London's experiences is lower for international visitors than domestic visitors, highlighting potentially different expectations or how a destination needs to consider the different needs of international and domestic visitors.
- There is significant potential to grow domestic visitor volumes in outer boroughs that have excellent satisfaction scores.

<u>Domestic visitor review scores and spend by borough</u>



<u>International visitor review scores and spend by borough</u>

Emerging visitor hubs

There is significant potential for London to build on new developments to create new visitor hubs, disperse economic value, encourage more repeat visitors and longer stays. The latter improves customer satisfaction and increases the carbon efficiency of a visitor's time in London.

Future visitor hubs could be:

1. Existing places that are currently "hidden gems" with the potential to grow visitor numbers.

2. New and emerging destinations such as Battersea Power Station and East Bank in the Queen Elizabeth Olympic Park.

3. Live development sites and future investment zones across the city.

New and emerging places

London never stands still. Significant investment is changing the map of London. It is this change that sets the city apart from many of its competitors. Battersea Power Station is now open, a £9bn investment creating a new neighbourhood, Tube station and leisure destination. The East Bank will soon open in the Queen Elizabeth Olympic Park, bringing together world-class experiences from BBC Music Studios, Sadler's Wells, London College of Fashion, University College London and the V&A. In the north, the Brent Cross redevelopment is transforming the area and aims to capitalise on the 50 acres of green parks and playing fields by becoming the destination for sport and play.

These new destinations and many like them can form a part of London's visitor experience offer, helping to provide unique experiences that differentiate London from its competitors. As previously highlighted, the challenge is to ensure that visitors are aware of these destinations, and that the destinations have their own distinct brand and an experience offer to attract visitors.

Development opportunities

There are seven key Investment Zones in London being accelerated by investment in new infrastructure such as the Elizabeth Line, HS2 and the Thames Tideway Tunnel. The zones are: Barking Riverside, Croydon Town Centre, Euston, Royal Docks, Old Oak and Park Royal, Thamesmead and Upper Lea Valley. We can use the London placemaking framework to understand which of these opportunities may be suitable to become a future visitor hub.

Almost every borough has a range of development opportunities. These can be identified by working with organisations such as Opportunity London, which aggregates economic development strategies for London's boroughs. Working with landlords and developers, we would create compelling visitor propositions as part of these strategies, expanding the economic potential of a place.

For example, Barking will soon be home to three historic London wholesale food markets in Dagenham Dock: Smithfield, Billingsgate and Spitalfields. This could become a visitor experience opportunity similar to Tsukiji Wholesale Market in Tokyo, which has become a must-see destination, attracting 10 million visitors each year. How can London build on the historic foundations of these three famous markets and capitalise on the trend for sustainability and wellbeing to provide a world-class consumer food experience?

Elizabeth Line opportunities

The Elizabeth Line is Europe's largest construction project and London's biggest infrastructure project for more than 20 years. The line opens the capital up to millions more domestic day trippers in the south with an extra 1.5 million people now within 45 minutes of central London. Connectivity within the city is also improved, from key visitor hubs such as Heathrow in the west, to Greenwich in the east.

This connectivity is key for emerging visitor destinations. Tottenham Court Road has already been transformed, and now provides new visitor experiences such as the Outernet and Monopoly immersive experiences. Other stops such as Paddington in the west and Stratford in the east are expanding their leisure offer and have the potential to become future visitor hubs rather than places that visitors travel through.

Other destinations can grow too. Canary Wharf for example, impacted by the decrease in commuters post-Covid due to hybrid working, presents another side of London with plentiful access to docklands and waterways. Destinations such as Greenwich can also use the improved connectivity to help disperse visitors from local hotspots to nearby Woolwich.

The role of visitor accommodation

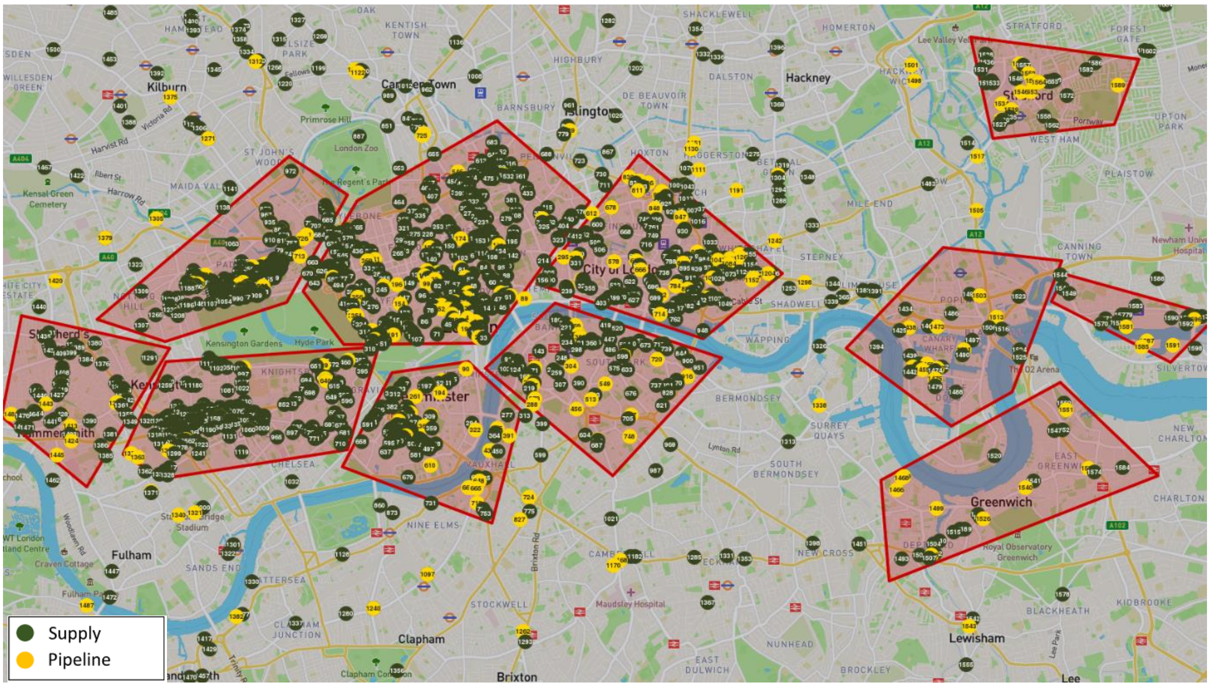
35% of recent visitors agreed that cheaper accommodation would encourage them to stay longer on a future visit. There is an opportunity to consider where visitors are encouraged to stay, with outer London accommodation not only cheaper, but also more likely to disperse visitors, particularly repeat visitors.

The location of visitor accommodation location is important for two reasons:

- Areas of London with a high concentration of hotels but low visitor numbers can consider how they can encourage more visitors to stay and explore the area near their hotel. For example, the City of London has a strong supply of accommodation, showing the potential for the City to encourage people staying in the area to explore the local leisure offer as part of its Destination City strategy. Stratford and Canary Wharf also have a strong supply of visitor accommodation showing their potential to grow their visitor offer.

- Emerging visitor hubs without accommodation can attract more visitor accommodation to encourage more overnight visitors to their area. Battersea is an example where there is a significant visitor offer but limited visitor accommodation. Greenwich already attracts 19 million visitors a year but has limited visitor accommodation.

<u>Current and future hotel supply in London</u>[71]



[71] AM:PM (part of the STR/CoStar group)

6.2 Seasonality and dispersal

There is evidence that overcrowding results in a lower satisfaction score and that cities must monitor this impact as visitor numbers grow. London does not have acute seasonal or geographic crowding of visitors, unlike popular, smaller destinations such as Amsterdam and Venice.

Seasonal dispersal

Visitor nights peak in the summer (Jul-Sep) with a quieter period in winter (Jan-Mar). There is no correlation between visitor volumes and lower visitor satisfaction scores.

Seasonality in London

	Q1	Q2	Q3	Q4
Visitor nights[72]	21%	25%	31%	24%
Satisfaction score (0-10)[73]	8.6	8.7	8.6	8.5

There are tactical seasonal considerations:

- Hotel occupancy is 75% in Q1 versus 88% in Q3. Accommodation satisfaction is higher in Q1 than the rest of the year, which is likely due to lower prices and increased availability. How do we grow the number of visitors arriving in Q1?
- Specific visitor hotspots in the city may be crowded. For example, visitors to Camden in June and July have lower satisfaction scores than the rest of the year.
- Limited availability of tickets to popular attractions could reduce overall satisfaction rates as “being able to do everything I want” is a key visitor satisfaction driver. This could be a longer-term trend as visitor numbers to London are forecast to grow.
- Seasonality should also be a key consideration for the timing of London gateway campaigns, with gateway campaigns avoiding the peak summer season when many UK destinations are already busy.

Geographic dispersal

92% of international visitor spend is within the Central Activities Zone (CAZ) versus 60% for domestic visitors[74]. The top four visitor boroughs by visitor volume (Westminster, Camden, Kensington and Chelsea, Tower Hamlets) all have lower satisfaction scores than nearby boroughs with lower visitor volume destinations such as Southwark, Lambeth and City of London. This demonstrates how encouraging visitors to see more of the city can help improve satisfaction.

As noted earlier, the growth of new visitor hubs in London also presents the opportunity to ensure that visitors go to a wider range of places, stay longer and spread the economic benefit wider across the city.

[72] Domestic and international visitor nights to London (IPS and Visit Britain data, average 2017-2019).
[73] TCI visitor research using customer review data, 2023
[74] GLA Economics tourism expenditure report, 2020

There are challenges to this. Two in five visitors say attractions are too dispersed for them to see them all[75]. Visitor satisfaction levels are lower for outer London with an NPS of 40 compared to 47 for central London[76] and lower customer review scores of 8.1 for outer London compared to 8.6 for central London[77]. The product offer of lesser visited destinations also needs to be suitable for visitors.

The priority is to develop and raise awareness of lesser visited areas of the city that have the potential to become visitor hubs as set out earlier in the placemaking framework. This strategy can focus on both day trips to other areas of London, and encouraging more overnight visits by increasing accommodation outside of traditional visitor hubs as outlined in the previous section.

6.3 London as a gateway to the UK

92% of travellers from China, India, Japan and the US visited multiple towns or cities during their most recent trip to Europe[78]. Yet there are more searches for London-Paris trips than London-Scotland[79]. Only 15% of London visitors visit another UK destination. These ‘London Gateway’ visits contribute £641m to the local economies that London visitors go to[80], however there is potential for this to grow.

Visitors visiting London plus another UK destination are more likely to be satisfied with the trip to London. Trip extension can also help reduce a visitor’s carbon intensity per pound spent in the UK. Gateway visits also broaden the appeal of London as a destination. For example, a London-Scotland package combines a world-class “coasts and countryside” offer with London’s global city appeal.

This strategy has already highlighted the need for improved navigation throughout the UK to help facilitate additional gateway visits. The complexity of organising a trip to two UK destinations can be complicated and 60% of potential UK visitors don’t know much about the wider UK offer beyond London[81].

---

[75] London & Partners visitor satisfaction, 2023
[76] London & Partners visitor satisfaction, 2023
[77] TCI visitor research using customer review data, 2023
[78] European Travel Commission, 2018
[79] Google search data, July 2022-June 2023
[80] London & Partners, London Plus
[81] Visit England Trains, The Gateway to London, 2016

7 London brand

Visitor satisfaction is influenced by how closely an experience meets a visitor's expectations. These expectations are shaped by London's brand. London has a strong brand and is regularly cited as a top destination brand globally[82]. The city should continue to play to these strengths, using iconic London hooks to attract and engage audiences.

There is also a role for the London brand to evolve and address areas where perceptions of London are relatively weaker than competitors. This strategy has identified several brand messages that should be prioritised to reshape how the city is perceived, from sustainability through to food and drink.

There are also key information gaps where audiences can be better informed about the choices they make both before and during a visit. For example, how visitors travel through the city or how they extend their stay, either in London or by visiting other areas of the UK.

London's brand versus destination decision drivers

The table below compares perceptions of London against the key destination decision drivers. London can improve in specific areas, many of which have already been identified through this strategy.

Top 10 global drivers of destination choice[83]

	Perception of London*
1. Offers good value for money	Low
2. Is a welcoming place to visit	Low
3. I can roam around visiting many types of places	High
4. Is good for relaxing, resting, recharging	Low
5. There is beautiful coast and countryside to explore	Low
6. It's easy to get around once there	High
7. Offers lots of different experiences in one destination	High
8. There is a good variety of food and drink to try	Low
9. It's easy to get to	High
10. It has experiences I can't have anywhere else	Low

*Perceptions of London where available, or perceptions of the UK where London specific research is not available.

London is already famous for its history and diversity of experiences, people and places. The challenge is to build on this and make London famous for experiences that are key drivers of both visitor satisfaction and destination decision-making such as food and drink and wellbeing. How do we expand perceptions of London as a place for fish and chips versus the

[82] Brand Finance City Index, 2023
[83] Visit Britain MIDAS, 2022

incredible diversity of cuisines, halal and vegan food? How can we build on the city's strength in parks and green spaces to tell a story of a sustainable visitor destination?

London's brand priorities

1. Encourage visitors to stay longer and explore more of London.
2. Highlight London's unique experiences.
3. Showcase the world-class quality and diversity of food and drink in the city.
4. Make London as famous for its parks and green space as its history.
5. Demonstrate that London is a welcome, open city.
6. Showcase London's value for money.

7.1 Priority markets and audiences

London has traditionally targeted the highest value visitors. However, we must also consider the carbon impact of visitors. The table below highlights how this impacts London's priority markets. The domestic market remains important in both scenarios while short-haul markets increase in priority when considering the carbon impact of visitors. These considerations will inform demand generation campaign choices for London & Partners, dependent on budgets and objectives.

Top markets by spend 2030[84]

Market	Spend (£m)
Domestic	3,834,000
USA	2,145,895
China	1,386,445
Saudi Arabia	926,343
France	797,900
Germany	645,970
Italy	630,560
Spain	625,552
Australia	462,626
Netherlands	299,952

Carbon generated per pound spent

Market	Kg CO2 per pound spent	Spend (£m)
Domestic	0.1	3,834,000
France	0.2	797,900
Germany	0.4	645,970
Saudi Arabia	0.7	926,343
China	2.2	1,386,445
USA	3.2	2,145,895

[84] Tourism Economics

8 Future trends

A key aim of this strategy is to future-proof London's visitor experience. The city's experiences and places must meet future audience, technological and climate changes that will shape how visitors engage with the city.

The core reasons why people visit another country and the experiences they seek are unlikely to change significantly in the next 10 years. Visitors will still want to rest and relax, see the top sights, and treat themselves. They will still choose "traditional" sightseeing activities when in destination – but their expectations for these experiences will evolve.

The challenge for London's visitor economy is for its existing mainstream experiences to evolve with these future trends, rather than providing niche "trend-chasing" experiences that lack wide appeal.

For example, we should respond to the trend for immersive experiences by considering how an existing visitor experience such as a gallery could be enhanced with music, food, live actors or technology – rather than focusing on creating new immersive experiences. Or we should consider how new product development can be used to broaden London's night-time experiences beyond those focused on alcohol, responding to evolving consumer trends and demographics.

8.1 Climate change and sustainability

Tourism accounts for an estimated 8-11% of global greenhouse gas emissions[85] and this will grow as demand for travel is forecast to double by 2030. The hotel industry sees sustainability as the biggest risk to the industry in the long term with current regulations seen as a key barrier to adapting quickly[86]. For visitors, climate change may mean visiting in different seasons or adopting different behaviours in destination, from seeking cool spaces to changing how they navigate the city. For example, Barcelona is investing in major regeneration to increase the number of cool spaces in the city, which not only improve the visitor experience in the heat but also act as "calm spaces" tapping into a visitor's desire to unplug, unwind and relax[87].

London is already a progressive city with many sustainability advantages. A third of the city is green or blue space. 60% of trips in London are by public transport or active travel. The city has been named the most vegan-friendly city in the world[88].

However there is much work to be done. Two in three recent visitors do not believe London has a strong reputation for sustainability[89] and, in customer reviews, the city scores 7.1/10 as a sustainable destination, compared to 8.6 for competitors.

---

[85] World Travel & Tourism Council (WTTC)
[86] Deloitte, European Hotel Industry Conference Survey, 2023
[87] Politico, 2023
[88] Plantbased news / HappyCow survey, 2022
[89] London & Partners visitor satisfaction, 2023

It is not the purpose of this strategy to define the many sustainable initiatives already underway in London's tourism industry, but to ensure that the industry collectively tries to solve shared challenges while also taking responsibility for reducing its own carbon footprint.

Sustainable visitor growth

Tourism is a significant contributor to London's economy and while it is important to maintain this economic value, it can no longer be the single measure by which we assess a visitor's impact or prioritise which audiences we seek to attract. The carbon intensity of a visitor per pound generated is just as important.

The carbon intensity of visitors is not equal, as demonstrated in the table on the right. Various factors influence the carbon impact of a visitor: long-haul versus short-haul visitors, trip duration and behaviour in destination.

2030 Forecasts		
Market	Kg CO2 per pound spent	Spend (£m)
Domestic	0.1	3,834,000
France	0.2	797,900
Germany	0.4	645,970
Saudi Arabia	0.7	926,343
China	2.2	1,386,445
USA	3.2	2,145,895

As a city we should strive to attract higher value, lower impact visitors more inclined to engage in sustainable behaviours. This should be measured using a new metric of carbon intensity per pound spent, to balance the economic benefits with the carbon impact.

Reducing the carbon intensity of a visit in destination

There is no escaping the fact London is on an island which most international visitors need to fly to. Aviation accounts for approximately 50% of global tourism emissions[90]. The aviation industry is on a decarbonisation journey. In the near term, there is potential to significantly reduce carbon impact in-destination with priority areas highlighted in the table below.

Sector	% of carbon footprint[91]	Example solutions
Transport	50%	- Using sustainable aviation fuels. - Encouraging alternative transport routes where they exist (e.g. domestic and European rail). - Increasing walking versus transport, more green transport.
Retail	12%	- Supply chain management. - Improving packaging and going paperless.
Food & drink	10%	- Minimising food waste. - Using sustainably sourced ingredients. - Increasing vegetarian food offer.
Accommodation	6%	- Removing single use toiletries. - Reducing energy consumption / sourcing green energy.

90 Sustainabletravel.org, 2018
91 Sustainabletravel.org, 2018

Audience demand

65% of recent visitors to London indicated a preference to visit attractions or experiences that can demonstrate how sustainable they are.[92] There is high intent to make more sustainable choices, particularly for transport and accommodation. 46% of consumers can be persuaded to choose sustainable options[93].

Two in five visitors try to find experiences in destination that will minimise the impact on the planet[94]. This suggests that more can be done both pre-trip and during the trip to encourage visitors to make more sustainable choices such as buying local produce, using public transport or seeking out more of a local experience when in London.

When it comes to taking leisure breaks/holidays abroad which of the following have you done in the past?

The sustainability intention gap

However, there are barriers to overcome to ensure that a visitor's intent leads to action on sustainability. Seven in 10 travellers feel overwhelmed by starting the process of being a more sustainable traveller[95]. Many are on holiday and do not want to worry about their carbon impact, seeing it as the responsibility of the destination.

Cost and information are leading barriers to making sustainable choices. London must do more to ensure that sustainable tourism is both affordable and easily understood. Sustainability should not rely on visitors to make the "right choice" – rather, sustainable choices should be the default choices. We must provide simple, consistent and trustworthy information within channels that visitors already use to make travel choices, both before and during their trip.

[92] London & Partners visitor satisfaction, 2023
[93] Various sources: Canvas8, Skift, BVA BDRC sustainability green paper 2022.
[94] Visit Britain MIDAS, 2022
[95] Expedia Sustainable Travel study, 2022

Drinking water and reducing plastic case study

Up to one billion single-use plastic bottles are used in London each year. Access to drinking water for refillable containers remains limited. 63% of people would stop buying bottled water if there were more opportunities to fill up refillable water bottles. Various initiatives are already in place to increase access to drinking water, such as City to Sea's "Refill London" campaign which provides 5,000 refill stations. Visitor awareness of where to find these locations is limited and adoption by businesses within the tourism industry could be improved.

8.2 The changing shape of experiences

Travellers are increasingly seeking unique experiences in destination. Spending on experiences is up 65% compared to a rise of 12% for buying products[96]. Key trends shaping the future visitor experience include:

- Unique: visitors want to feel special and find unique experiences they can't get anywhere else[97]. Unique can mean iconic, bespoke, unusual or new experiences. London and the UK currently score low for the range of unique experiences available.

- Wellbeing: 80% of people believe wellness is important and 50% say wellness is the top priority in their day-to-day lives[98]. Visitors are also prioritising their own wellbeing

[96] Mastercard Travel Industry Trends, 2023
[97] Visit Britain MIDAS, 2022
[98] McKinsey, 2022

with two in three visitors planning holidays with their wellbeing in mind[99]. Only 16% of Gen Z audiences drink alcohol on a weekly basis, compared to more than 30% for older audiences[100].

- Social: 87% of visitors travel with at least one other person[101]. How can experiences be more social experiences, providing visitors with the opportunity to spend quality time with friends and family[102]?.

- Treating ourselves: visitors treating themselves is a key motivation for taking a holiday. A treat can mean different things to different people based on their mindset. A premium accommodation experience might not necessarily mean a five-star hotel, it could mean a spacious short-stay rental where they can "live like a local".

- Immersive retail: global retail is in transition as more people shop online, they instead visit physical stores to enjoy an experience and feel part of a community. Stores of the future must focus on the experience, providing entertainment, education and events to encourage awareness and footfall rather than sales alone[103]. London must be proactive in managing the changing face of the city's high streets. Visitors are looking for unique experiences, not retail chains they can visit in any country. Retail products must align to the changing audience trends too, with local and ethical products a key purchase consideration for visitors.

8.3 Technology and Artificial Intelligence

Over the last 20 years, technology has radically changed how visitors experience a destination. Smartphones put tour guides in visitors' pockets and the ability to capture special moments on camera, which they can instantly share with friends and family. Satellite mapping means less time navigating. New technology-driven platforms enable us to "live like a local" and stay in a resident's home.

While in destination, travellers are already using their mobile devices to:

- Use navigation features (75%)[104].
- Research restaurants (62%).
- Research attractions (46%).
- Post status updates to social media (38%).

---

[99] Visit Britain MIDAS, 2022
[100] GWI, Gen Z Audience trends, 2019
[101] Visit Britain MIDAS, 2022
[102] FullFat, Gen Z audience report, 2020
[103] Gensler future trends
[104] TripAdvisor Smart Phone usage, 2011

The dawn of Web 3.0 is here and London's visitor economy must continue to evolve, using technology to deliver ever greater experiences. Places with the latest technology report a higher rate of satisfaction than those without[105].

Compelling experiences start with an understanding of the visitor and not the technology itself. Technology cannot be a substitute for real-world experiences, which is, after all, why we travel. Technology must simplify life for visitors or be used to enhance and better connect them to the real-world experiences.

Artificial Intelligence

Artificial Intelligence (AI) has the potential to transform how a visitor experiences a city. AI chatbots can quickly summarise vast amounts of data from many sources into easily digestible itineraries. The tools have the potential to organise, plan and purchase an itinerary-packed holiday at the click of a button, or to provide a fully customised virtual assistant who can be your own personal tour guide for the duration of a trip. AI will be a boon for travellers who are often time-poor and overwhelmed with information about a destination – they already visit almost 40 websites to plan a single trip[106] and spend 13% of their holiday time online planning things to do.

AI also has the potential to help ease London's hospitality talent shortage, providing automated customer service functions that can not only simplify a visitor's journey through the city but also increase a visitor's welcome. For example, Connie, the robot concierge at Hilton, uses the IBM Watson AI to provide hotel customer service and recommend local attractions.

Hybrid and digitally enhanced experiences

For all the talk of the metaverse and virtual worlds, people still crave real-world experiences and connections. London must focus on this real-world experience and explore how emerging digital technology can help solve existing visitor problems or add value to current experiences, using an open innovation approach to work with established and emerging leaders in their fields.

For example, how do we use virtual queues to ease friction during peak season? How can AI-enhanced virtual maps improve wayfinding in the city or create new products like walking tours? How can visitors connect their own devices to hotel devices when staying overnight? Even the basics must be considered. Some hotels may be considering robot concierges while others may need to improve access to convenient mobile charging points.

[105] Gensler Experience Index
[106] Expedia, Retail and Travel report, 2013

9 Action plan

The actions below are the priorities for London. They will be delivered through collective action, with the industry and London & Partners taking different roles as defined in *Section 10.1- Roles and responsibilities*. Some time frames are dependent on funding.

Visitor essentials		Timeframe Short	Timeframe Long
Sustainability	• Form an industry-wide sustainability working group to provide strategic oversight, share best practice and coordinate activities.	✓	
	• London's tourism sectors will deliver their own sustainability strategies and objectives, coordinating with one another to follow national and international collective guidelines where possible.		✓
	• Identify and join the relevant national or global schemes to improve the sustainability of experiences and provide simple, consistent and trustworthy information.	✓	
	• Improve communication of sustainable visitor options and experiences to reduce the "sustainability intention gap" throughout the visitor journey in London.	✓	
	• Measure the impact of London's visitor economy not just on economic growth but also on the carbon intensity of visitors, aiming to reduce the average carbon intensity per visitor.	✓	
	• Measure the impact of London's specific tourism sectors (accommodation, retail, travel etc) to track progress against targets and understand which verticals are priority areas for the industry to address.	✓	
Welcome	• Increase welcomeness of visitors in the promotion of London.	✓	
	• Use Londoners and recent visitors to showcase how welcoming the city is to counter negative perceptions.		✓
Internet	• Create a city-wide, connect once, access anywhere free internet network for visitors. Prioritise existing visitor hubs.		✓

Experiences		Timeframe Short	Timeframe Long
Existing product development	● Support UK hospitality's workforce strategy to improve recruitment, training, working lives and image of the sector to support a thriving hospitality workforce.		✓
	● Work with the sector to ensure a high quality of existing food and drink provision in key visitor hubs, with a particular focus on the availability of good quality, affordable and healthy fast food.		✓
	● Work with the industry to better signpost top-rated food and drink experiences, for example, working with key channels such as Google and Apple maps, actively working with the industry to increase the volume of customer reviews on these platforms or better signposting their reviews in shop windows.	✓	
	● Work with the industry to review how current experiences in London can align to key future trends and consider how experiences may be able to extend opening hours.		✓
New product development	● Attract London's next big experiences, using hero experiences to help rejuvenate London areas that are not already key visitor hubs.		✓
	● Attract new experiences that build on London's strengths and appeal to future visitors, tapping into key visitor trends such as personal wellbeing, sustainability and those which use technology to enhance the physical experience.		✓
	● Prioritise food and drink experiences that both align to audience demand (English cuisine, street food, better fast food) as well as addressing future trends (sustainable and healthy food).		✓
	● Prioritise green spaces and experiences to develop tangible sustainable experiences.		✓
	● Attract visitor accommodation to suitable visitor hubs to encourage more overnight stays outside of central London.		✓

Places		Timeframe Short	Long
Existing places	• Convene the city's tourism industry and relevant stakeholders to share best practice, with a particular focus on improving visitor satisfaction levels.	✓	
	• Better brand and differentiate London's places so they are clearly defined and attract visitors, helping to disperse visitors geographically across the city.		✓
	• Define and build a map of London which defines key visitor hubs at a more detailed level than at a borough level, using visitor volume and satisfaction scores to help identify London's existing and future visitor hubs.	✓	
	• Encourage London Gateway trips in pre-trip information and, subject to funding, in marketing campaigns. Work with Visit Britain and the travel trade to promote London Gateway visits.	✓	
New and emerging places	• Identify emerging and hidden gem visitor hubs with the aim to grow visitor numbers and use these hubs as hooks to encourage visitors to stay longer and explore more of the city, with a particular focus on domestic visitors.	✓	
	• Work more closely with developers and landowners at the very outset of new development plans to ensure a visitor lens has been applied to destinations wishing to become visitor destinations.		✓
	• Apply a visitor lens to relevant policies and developments to ensure visitors are considered as a key audience of future place planning.	✓	
	• Adopt the placemaking framework to support new and emerging visitor hubs to develop and grow their places as successful visitor hubs in the city.	✓	

Brand	Timeframe: Short	Timeframe: Long
• Target more sustainable visitors: those who live closer, stay longer, spend more and are more likely to engage in activities with a lower carbon impact when in the city.	✓	
• Encourage visitors to enjoy London’s wide array of existing green spaces to help them recharge and see more of the city, from The Royal Parks to ancient woodlands	✓	
• Food and drink: expand perceptions beyond traditional English food and drink to better align to the eclectic international food scene enjoyed by Londoners.		✓
• Promote sustainable information within the channels visitors are already using to make travel choices, both before and during their trip.	✓	
• Use demand generation campaigns to encourage visits outside of the summer peak to help increase hotel occupancy rates when they have more capacity.	✓	
• Always-on drum beat communications: dial up the visitor welcome, value for money at all price points, and London as a gateway to the UK messaging.	✓	

10 Delivering the strategy

A coordinated approach

Successful delivery of the strategy will require collective action from a wide range of stakeholders, from policymakers to developers, to local placemakers and experience providers. This can be challenging in a large global city such as London. There are more than 70 BIDs with an average of three new BIDs every year; 33 boroughs, hundreds of experience providers, thousands of hoteliers and policymakers.

Yet many of London's stakeholders already work together and have clear visitor strategies. This strategy sets out the vision to bring these pockets of excellence together to deliver a city-wide visitor experience. This is a key role of London & Partners – working closely with the industry via the city's Tourism Advisory Group.

There are already many plans and projects underway that align to the strategy. This strategy will maximise the visitor impact within these existing projects rather than duplicating effort. For example, how can programmes such as the London Borough of Culture be used to launch a local visitor economy? How can trials of free wifi for residents be extended to target key visitor hubs?

The role of open innovation

Given the broad range of recommendations, the group of stakeholders required to address each will differ depending on the priority. An open innovation approach to delivery will invite specialists, not just from London but from around the world, to help tackle key challenges.

Innovation ecosystems can include not only key industry stakeholders but also leading technology platforms, high growth startups, the city's universities, and residents. This approach can help source ideas from beyond the usual suspects. Examples like Westminster Council's Innovation Challenge competition with Google and Microsoft invited local business and communities to submit ideas to improve the borough[107]. New York City holds an annual contest for organisations who can use the city's open data sets to solve key challenges[108] and provides funding for tourism initiatives that increase visitor numbers[109].

Small change, big impact

Delivering the strategy can also be done efficiently. Innovation can be incremental as well as radical: quick incremental wins such as adding locations of toilets to Google and Apple maps, versus radical innovation such as using AI to alleviate workforce shortages. Open innovation often starts with "beacon projects", significant proof of concept projects aligned to the strategy that deliver early value and gain further buy-in and funding to scale up.

In the US, the Project for Public Spaces has successfully used "lighter, quicker, cheaper" interventions to improve public spaces[110]. Simply placing chairs on the Harvard University lawn turned a thoroughfare into a social and collaborative space where ideas are

[107] Westminster Council Innovation Challenge
[108] New York City Big Apps project
[109] New York Tourism match funding programme
[110] Project for public spaces

exchanged. Transport for London follows a similar approach with the Small Change, Big Impact programme to create healthier streets.

The role of data

Data will play an essential role in delivering and capturing the impact of the strategy. The first principle is to understand how we can build on what already exists.

For example, how can this strategy use data frameworks defined by the London Office for Technology and Information? How might the need for data build on the GLA High Streets Data project, centralising a fragmented city-wide data supply? How can we learn from data projects already underway, such as the City of London's beacon project, designed to better understand visitor flows and value in the Square Mile?

Data has three key roles to help deliver the destination management strategy:

Role of data	Data required
Inform strategic planning for the city's tourism industry	• Visitor bookings (actual and forecast). • Performance: spend and footfall. • Hospitality workforce numbers.
Understand the visitor experience in the city	• Visitor satisfaction / return rate.
Measure the impact of the strategy	• Carbon intensity of a visitor. • Visitor satisfaction. • Length of visit. • London Gateway visits. • Perceptions of London. • Resident view of tourism.

Data dashboards alone are not a solution. Analysts are required to provide actionable insights to transform data into a strategy and ultimately, delivery.

Delivery principles

- **Collaborative:** no single organisation can solve the priorities in this strategy. We are more powerful as a collective.
- **Prioritise:** visitor experience covers a broad array of areas. We will ruthlessly prioritise those which will have a greater impact on visitor satisfaction.
- **Open innovation:** focusing on specific priorities and working in sprints with the relevant ecosystem of stakeholders, local communities and delivery partners to deliver proof-of-concept beacon projects.
- **Audience first:** understanding the customer missions and mindsets to guide which metrics are best used to measure performance.
- **Nimble and affordable:** identify small quick wins. What are key beacon projects and proof of concepts that can help attract further funding or stakeholder buy-in?
- **Play the long game:** innovation is not an overnight phenomenon. Don't be afraid to tackle big projects and take risks.
- **Be realistic to make a difference:** some of the aims in this strategy require significant funding. For example, you can't change a brand of a city with a small, one-off marketing campaign.

10.1 Roles and responsibilities

It will take a coordinated, collective approach to deliver the strategy. Policymakers will need to review and implement relevant policies with a visitor lens, while public sector delivery organisations such as boroughs will need to support and join city-wide visitor infrastructure programmes. London & Partners will play a key role in convening the industry, and the role of both London & Partners and the industry will vary depending on the priority as identified in the table below:

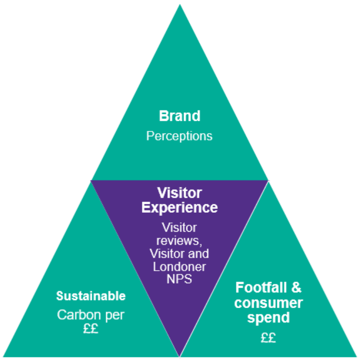
	London & Partners	Tourism Industry
Essentials Pan-London infrastructure controlled by multiple, mostly public sector stakeholders (water, wifi, toilets, transport etc)	- Raise profile of issues. - Convene stakeholders. - Coordinate collective action with industry.	- Lobby policymakers to develop key visitor infrastructure. - Support and join city-wide visitor infrastructure programmes. - Provide data to build business cases or measure performance.
Experiences Controlled by individual organisations (attractions, retail, venues, hotels etc)	- Attract new experiences. - Provide insights to guide existing experience owners to shape products.	- Address key customer problems that lead to low visitor satisfaction. - Share visitor satisfaction data with wider industry.
Places Controlled by groups of local stakeholders including local authority, landowners/developers, BIDs and anchor tenants	- Support places with strategy and brand development. - Find new products/experiences, support place product development strategy. - Help drive footfall, particularly to new and emerging places. - Win major events to animate city and brand.	- Ensure visitor essentials are in place to deliver great visitor experience. - Develop local product development strategy and work with local experiences to deliver high visitor satisfaction. - Develop distinct identities for their areas. - Animate areas to drive footfall.
Brand No overall control. London & Partners is London's brand guardian.	- Define the London-wide city brand - Communicate through own messaging and support industry to be on-brand.	- Align to wider London brand and include in pre-visit and in-destination messaging to visitors.

10.2 Measuring impact

Visitor satisfaction is the key metric to measure the industry's impact on the visitor experience.

Perceptions are important to ensure we measure improvements to the London brand in the targeted areas of food and drink and sustainability.

Impact of visitors should be measured both by the value they add to the London economy and the carbon intensity of a London visitor. A resident view of tourism can be captured by looking at sentiment towards tourism and its impact on them, their city and their local area.



10.3 Next steps

There is much to be done and much already happening. Coordination is key while bigger initiatives will be dependent on funding. London & Partners will act as the coordinator and convenor, working alongside key industry stakeholders to define and deliver collective delivery plans. The aim is to define what can be delivered using existing resources and what will be dependent on additional funding with a view to having a London & Partners Visitor Experience programme team in place for the start of 2023-24. In the meantime, collective action will progress through existing industry groups such as the Tourism Advisory Group and working groups focused on sustainability and the visitor experience.