

A photograph of a rooftop garden with lush green plants, including large ferns and other foliage. In the center, three people are sitting on a paved area, engaged in conversation. The background shows a panoramic view of a city skyline, likely London, with numerous skyscrapers and buildings. The sky is overcast. The overall scene is a mix of nature and urban architecture.

VISITOR EXPERIENCE STRATEGY

Summary Report

LONDON
& PARTNERS

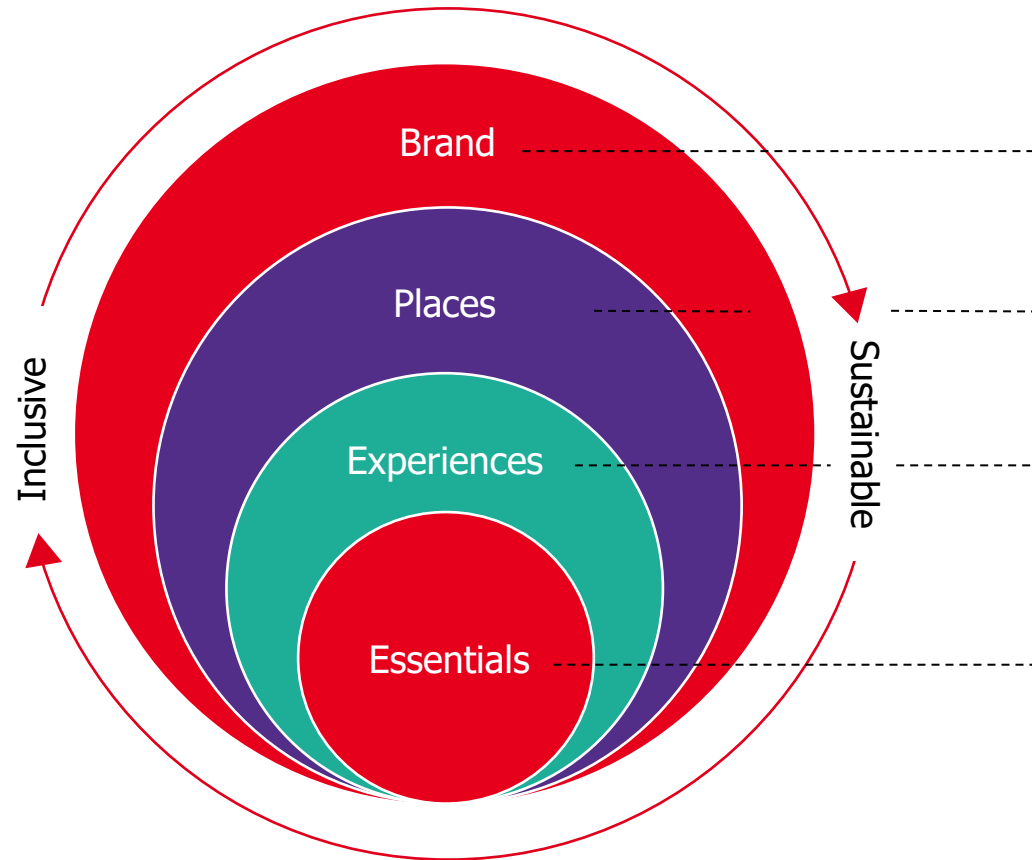
APPROACH

How do we decide what to prioritise?



Visitor Experience Pillars

The visitor experience is defined by many touch points, both before visitors arrive (i.e., their expectations) and in destination. To simplify this, our approach focuses on four key pillars.



How we talk about London which forms visitor expectations.

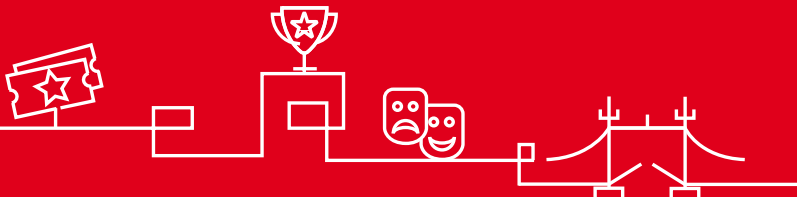
The city's distinctive visitor destinations.

The diverse and unique range of things to do in the city.

The city infrastructure underpinning the visitor experience.

What informs our priorities?

There are many things we could choose to do across the four pillars. A key strategic choice is if we focus on our strengths to build a competitive advantage, improving our weaknesses or a mix of the two.



Priorities have been informed by:

Visitor motivations

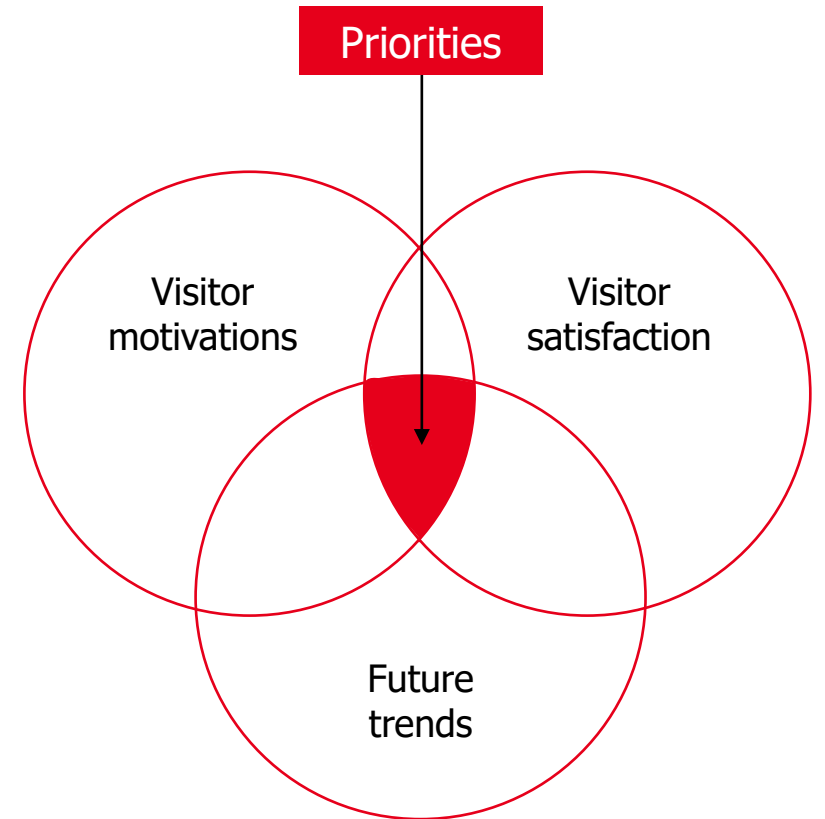
Where should we compete to establish a competitive advantage? For example, we will never be a coastal resort so we must play to our strengths.

Visitor satisfaction

London's current strengths and weaknesses from a visitor perspective.

Futureproof the London experience

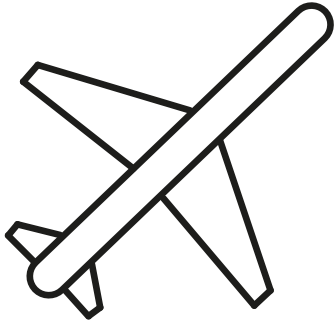
Align to the key audience and technology trends which will influence tourism in the years ahead.



Visitor Motivations – why people travel

Understanding visitor mindsets helps us understand their expectations and how the London experience aligns to these expectations.

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

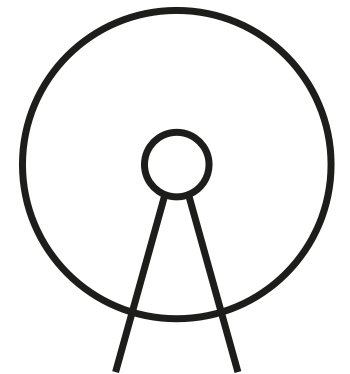
- Strengths
- Opportunities
- Weaknesses

Source: Visit Britain MIDAS 2022. Perceptions = various.

Visitor Motivations – Why people choose destinations

Understanding visitor mindsets helps us understand their expectations and how the London experience aligns to these expectations.

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%



Visitor perceptions of London

Strengths

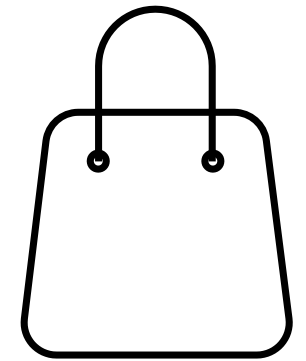
Opportunities

Weaknesses

Visitor Motivations – In destination experiences

Understanding visitor mindsets helps us understand their expectations and how the London experience aligns to these expectations.

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%



Visitor perceptions of London

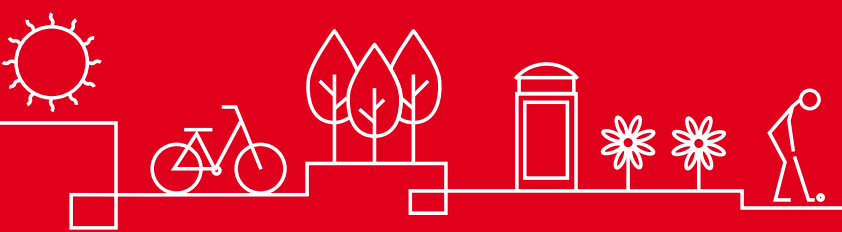
Strengths

Opportunities

Weaknesses

Satisfaction is high, but we should not be complacent

Customer review data shows London scores well, but below many competitors.



London satisfaction versus competitor cities



Source: TCI customer review data, last 12 months. July 2023.

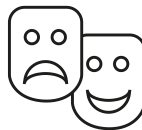
Future trends will shape expectations

Considering future trends will help future proof London's visitor experience.



Sustainability & wellbeing

- High visitor demand for a sustainable experience and increased focus on personal wellbeing
- Low visitor satisfaction with the sustainability of London's current offer
- London a busy city but also has abundant green space for visitors to relax



Evolving audience expectations

- Visitor expectations from experiences: unique, social, wellbeing, immersive
- Retail (more immersive) and nightlife (less alcohol) expectations are changing
- London scores low for unique experiences compared to competitors



Socially conscious

- Growing social conscience of audiences and inclusivity is essential
- London seen as an inclusive city, but this doesn't translate into the city being seen as welcoming



Technology

- Tech is an essential visitor companion which can enhance the visitor experience
- Potential for AI to simplify navigation, trip planning and customer service
- Technology can be used to create immersive 'hybrid' experiences



VISITOR ESSENTIALS

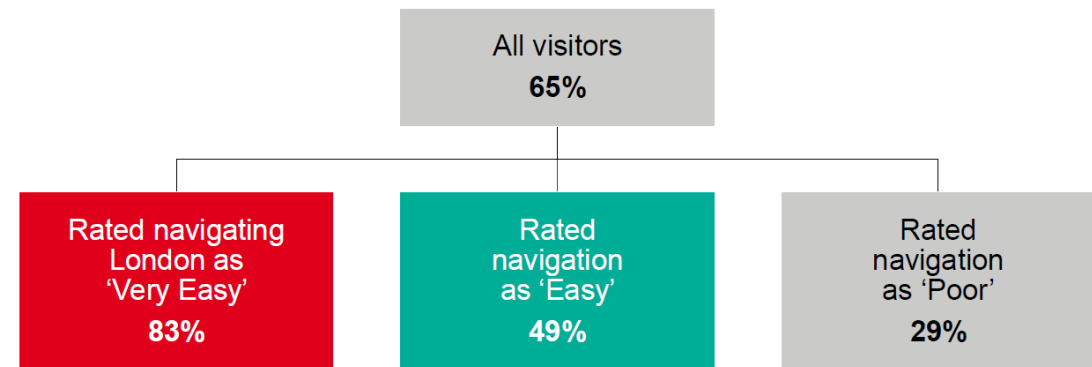
The city-wide infrastructure underpinning a visitor experience



Visitor essentials underpin **high satisfaction**

- Of the many elements contributing to a high visitor satisfaction score, 'Ease of navigation' was the variable with the highest significant difference for visitors who rated their trip as 'very good'.
- Recent visitors who said navigation in London was 'very easy' had the highest satisfaction ratings for their overall trip with 83% saying their overall visit was 'very good'.
- This demonstrates how key visitor infrastructure like navigation play just as an important role in delivering high satisfaction as the experiences that attract visitors.

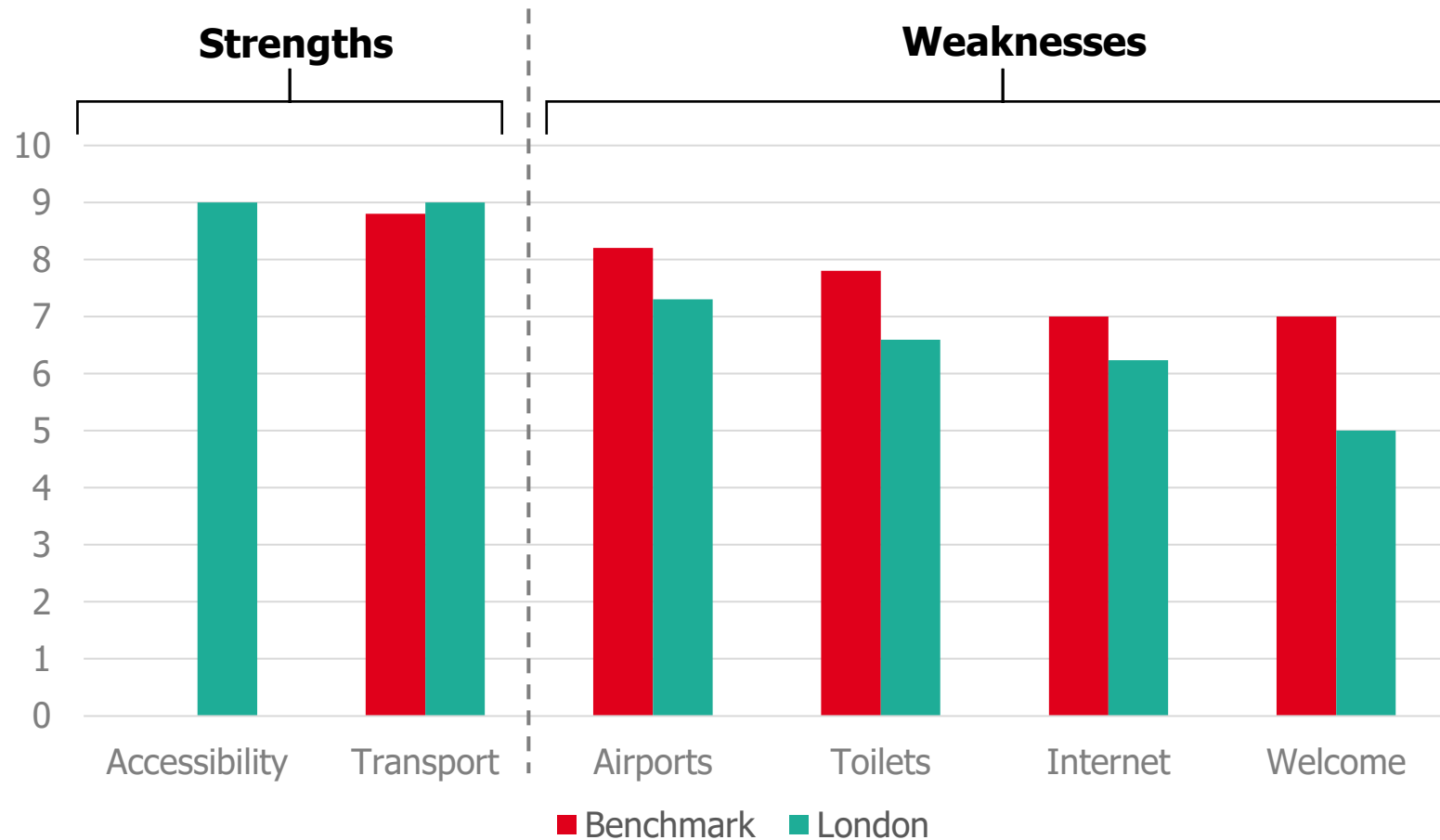
Factors associated with rating their trip to London as 'very good'



About this chart: CHAID analysis is a technique to identify factors which have the 'biggest difference' in a key indicator. This statistical model helps us understand which experiences are most likely to influence high visitor satisfaction.

Visitor essentials **strengths & weaknesses**

Internet and visitor welcome are two key areas for London to improve on. Welcome is a key driver of satisfaction and internet access will help visitors get the most out of their visit.



Source: TCI customer review research 2023 (transport, airports, toilets, internet). Welcome = Visit Britain London destination report (2015-2018), .Accessibility = GLA (no benchmark available)

Priority: Visitor welcome

Visitor welcome can mean many things, from pre-trip perceptions (London brand) to in-destination interactions with Londoners and hospitality staff. Ensuring London has a highly skilled hospitality workforce is central to a strong visitor welcome.

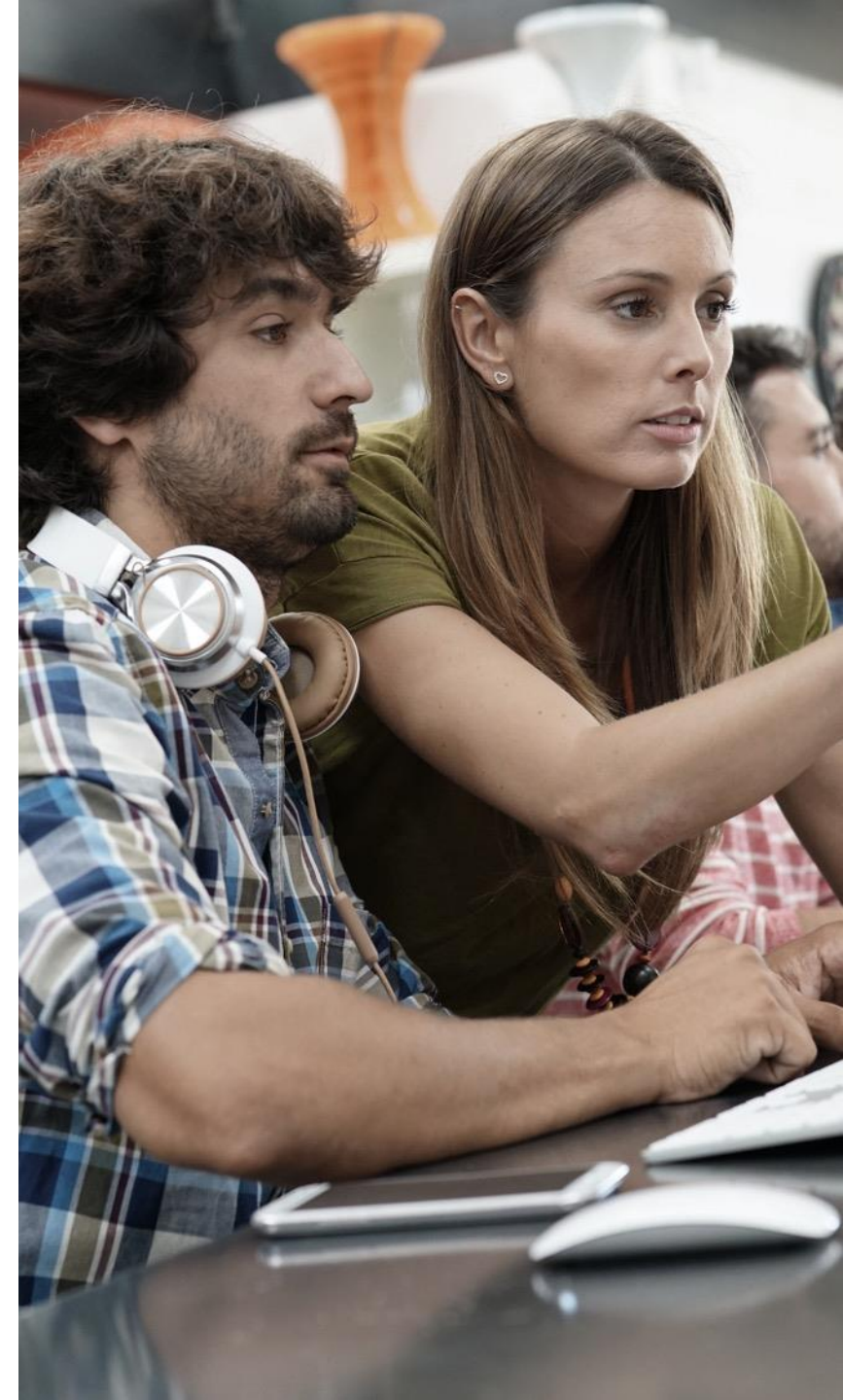


Priority: Internet access

Reliable internet makes a city easier to navigate, improves planning decisions in destination, and can be a factor in making visitors feel welcome.

- Less than 1 in 2 London visitors agreed they could access good Wi-Fi during their trip.
- London is behind competitor destinations providing free Wi-Fi (Paris, NYC, Barcelona).
- Customer review scores for internet access are low across every experience category, from accommodation and attractions through to tours and parks.
- Technology like the Open Roaming framework can automatically connect visitors to any participating internet network across the city.

Source: L&P Visitor research 2023, TCI customer review scores 2023



Priority: **Sustainability**

- Tourism accounts for an estimated 8-11% of global greenhouse gas emissions
- 50% of a visitor's carbon impact is during the visit
- 2 in 3 recent visitors do not believe London has a strong reputation for sustainability
- 65% of recent visitors to London indicated a preference to visit attractions or experiences that can demonstrate how sustainable they are
- 7 in 10 travellers feel overwhelmed by starting the process of being a more sustainable traveller

Source: TCI customer review research 2023 (transport, airports, toilets, internet). Welcome = Visit Britain London destination report (2015-2018), .Accessibility = GLA (no benchmark available)



Lower priority visitor essentials

Airports

Airports are the first and last touchpoint of the visitor experience however:

- Satisfaction scores vary significantly by individual airport
- Airport size is a fixed infrastructure constraint. For example, we are unlikely to be best in class and compete with mega airports like Singapore and Istanbul
- Airports are often required to prioritise operational efficiency ahead of the wider visitor experience

Toilets

- Provision of toilets scores low across all experience categories
- There is a need for experience providers to review how they can improve their own toilet provision
- Increasing the provision of public toilets is challenging, not just in London but nationally (funding, maintenance, etc)



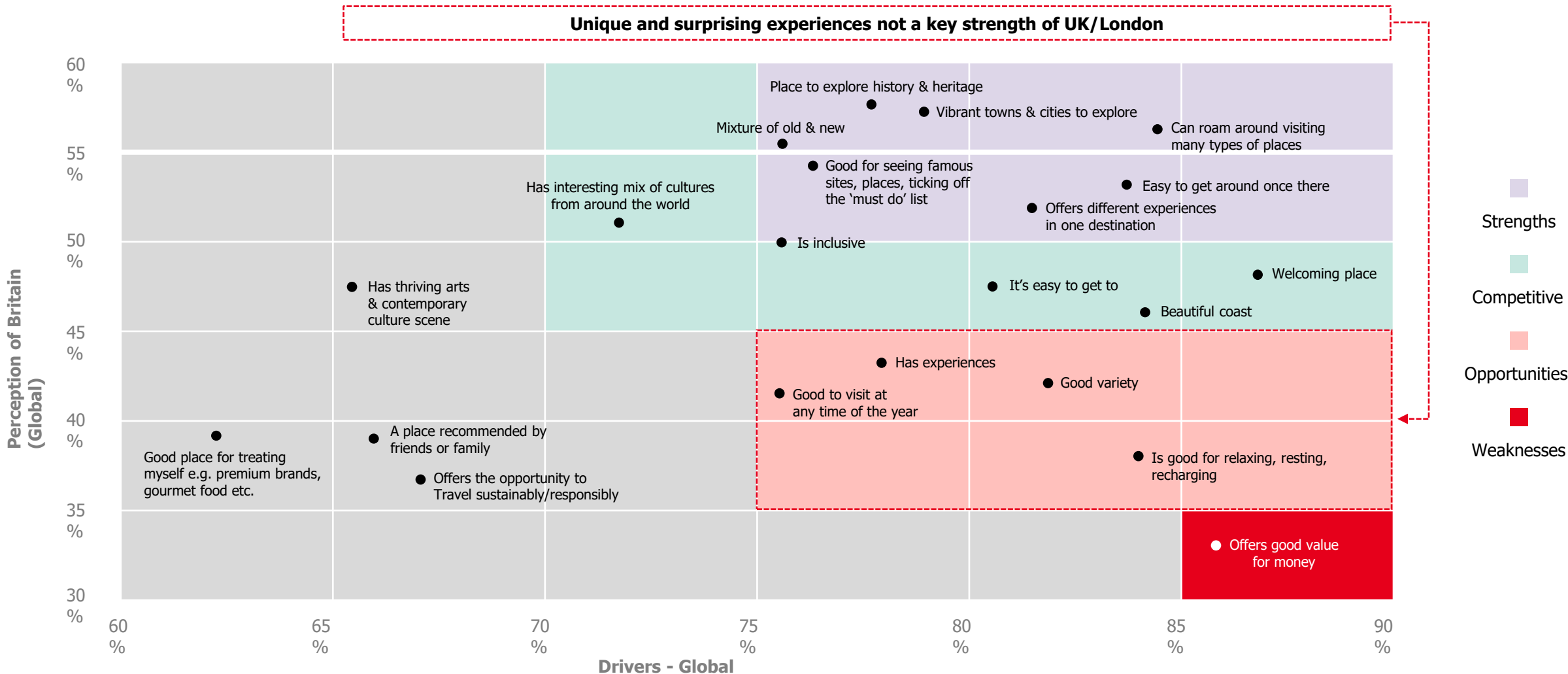
EXPERIENCES

Satisfaction with London's experiences



Priority: Develop unique and surprising experiences

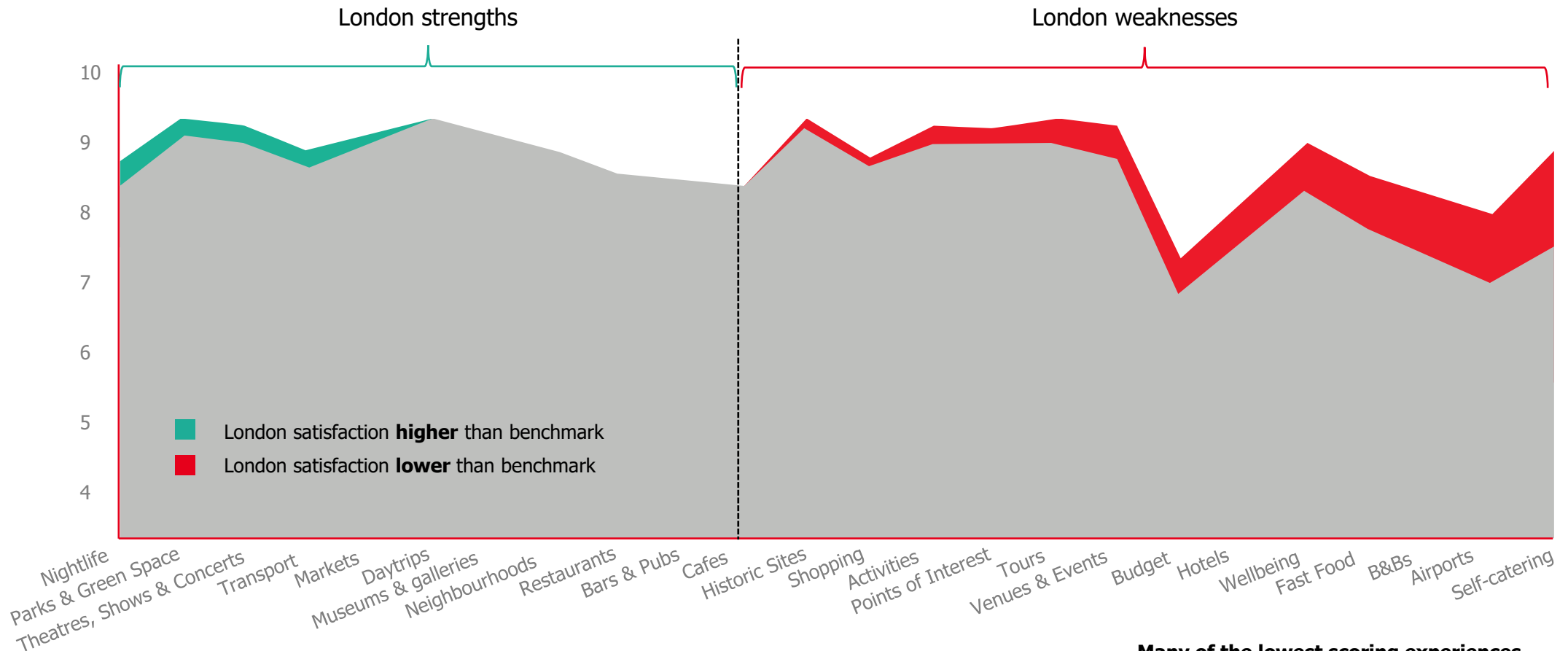
What experiences are visitors looking for? Drivers vs perceptions of Britain globally



Source: Visit Britain, MIDAS 2022

London experiences – strengths and weaknesses

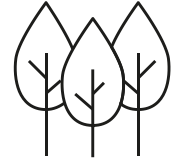
There is a strategic choice for London. Should we improve weaknesses or build on our strengths?



Many of the lowest scoring experiences are accommodation and budget related



Priority: Parks & Green Spaces



1. Parks & green spaces are a key competitive strength of London with very high visitor satisfaction
2. One third of London is green space, few cities can boast such a diversity of green spaces
3. Parks are a top experience sought by visitors when in destination
4. Relaxing and recharging is a key visitor motivation and destination decision driver
5. Green spaces are a 'tangible sustainability asset' and can help London be seen as a sustainable destination. They can also support visitor wellbeing providing the opportunity for visitors to relax and take time out on holiday



Priority: **Food & Drink**



1. Food and drink satisfaction is competitive but not a key London strength despite the city's incredible food offer
2. Food and drink is the second ranked experience sought by visitors in a destination, ranked higher than famous attractions and second only to coast and countryside
3. Food aligns with key future trends for more social experiences and can also help London's retail and nightlife offers adjust to global trends
4. Food has a strong connection to personal wellbeing and can also be used to demonstrate London's sustainability credentials
5. Visitors want to try both local and high-quality food – London is home to both and has one of the most diverse food offers in the world



Experiences – lower priority

Budget experiences

- A variety of budget experiences have low satisfaction however we do not recommend budget as a priority. Our focus should be higher value, lower impact visitors.
- Shopping scores lower than benchmarks for value for money. National policy decisions like tax free shopping is already an industry priority.

Accommodation

- Accommodation scores lower than the benchmark set of competitor destinations. London scores well for location but poorly for most other indicators including rooms, facilities and food.
- Satisfaction increases the more a visitor pays and budget accommodation has the lowest satisfaction scores. As noted above, we do not recommend prioritising budget options.

Source: TCI visitor research 2023

PLACES

A diverse and unique range of distinctive visitor destinations



London's **visitor offer** is growing

Visitors who stay longer will be more satisfied with their trip. This is an opportunity to encourage visitors to explore more of the city and stay longer.

New and emerging destinations like Battersea and East Bank through to hidden gems such as Richmond and Walthamstow can help encourage visitors to see more of the city and find different experiences.

Our challenge is to:

Ensure new places develop the products and visitor infrastructure to attract visitors

Clearly communicate and differentiate 'London's villages' to a visitor

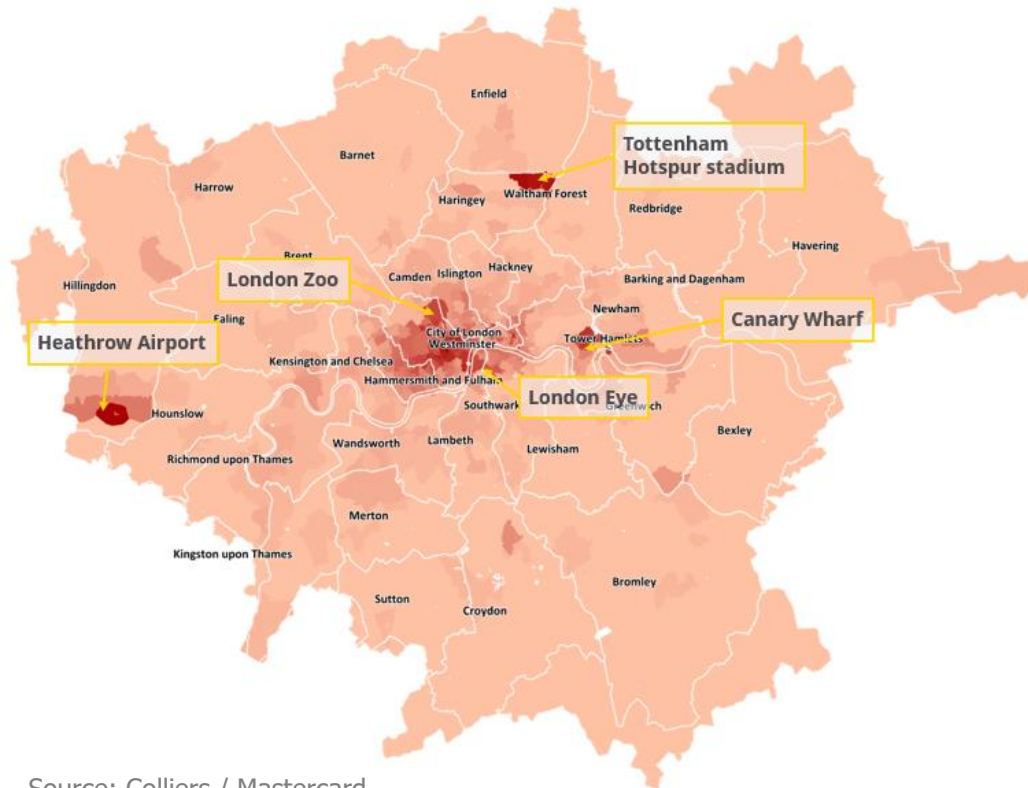
Source: London & Partners visitor research 2023



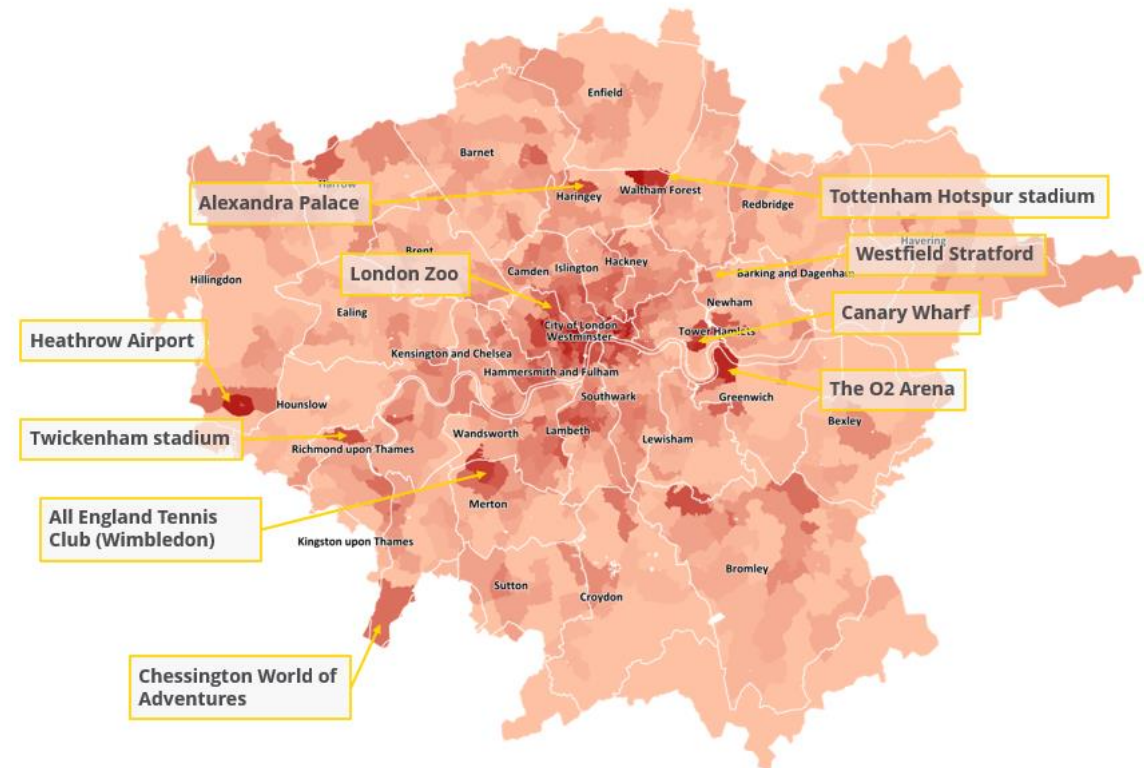
Encourage visitors to **see more of the city**

Visitors only visit a small percentage of the city. There is an opportunity to encourage visitors to stay longer and see more of the city, increasing their satisfaction, their spend and carbon efficiency.

International visitor leisure spend



Domestic visitor leisure spend



BRAND

How we talk about London will influence a visitor's expectations



Perceptions of London

London's overall brand is strong however there is room for improvement when comparing current perceptions of London to a visitor's reason for choosing a destination.

Top ten destination decision drivers	Perception of London*
Offers good value for money	Low
Is a welcoming place to visit	Low
I can roam around visiting many types of places	High
Is good for relaxing, resting, recharging	Low
There is beautiful coast and countryside to explore	Low
It's easy to get around once there	High
Offers lots of different experiences in one destination	High
There is a good variety of food and drink to try	Low
It's easy to get to	High
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.

Source: Visit Britain MIDAS and various data sources for perceptions of London

Brand priorities

Build on London's existing brand strengths with additional messaging aligned to:

- **Explore more of the city**
- **A city of unique experiences**
- **Parks & green space**, a tangible asset for sustainability and wellbeing messaging
- **Diverse and high-quality food & drink experiences**
- **A welcome city**

Source: Visit Britain MIDAS and various data sources for perceptions of London



PRIORITIES

Summary



Priorities – **Visitor 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 access to information on the go.
- Less than 1 in 2 visitors can easily access Wi-Fi in the city.



Encouraging sustainable visits

- Visitors want to be more sustainable, but it is not their priority when on holiday.
- Reduce the 'sustainability intention gap' throughout the visitor journey in London, ensuring sustainable options are the default choice.

Priorities – Experience and place



Strengthen and diversify the experience offer

- Diversify the product offer and provide more unique experiences
- New product development focus – make food a key London strength
- Attract products which align to global trends to futureproof the visitor experience



Increase the number of visitor hubs within London to encourage extended stays

- There is huge potential to extend a visitor's footprint across the city, visiting some of the city's many new and emerging leisure hubs
- Longer visitor stays will increase visitor satisfaction, consumer spend and carbon efficiency of visitors

Priorities – 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 is a key destination decision driver and driver of satisfaction, but London's food offer is not a competitive strength
- London's parks and green space are key strengths and can help position the city as sustainable destination with opportunities to relax and recharge
- Continue to highlight London's value for money at all price points



Encourage visitors to see more of London

- Encouraging visitors to see more of London resulting in extended stays
- Extended stays will improve visitor satisfaction, consumer spend and carbon efficiency



Important, but lower priority

We must make difficult decisions to prioritise not only what impacts the visitor experience but where we as a city can better make a difference.

Airports: A priority for individual airports to improve the visitor experience.

Toilets: Area of focus for individual businesses to improve facilities. Challenging to increase the number of public toilets.

Accommodation: the lowest satisfaction scores are with budget accommodation and this audience is not a recommended priority.

Visitor experience priorities



Essentials

- Internet
- Welcome
- Encourage sustainable visits



Experiences

- Unique experiences aligned to future trends
- Food and drink
- Parks and green spaces



Places

- Increase the quality and quantity of visitor hubs within the city



Brand

- Stay longer and explore more of London
- Unique experiences
- Food & drink
- Parks & green space
- Welcome
- Value for money

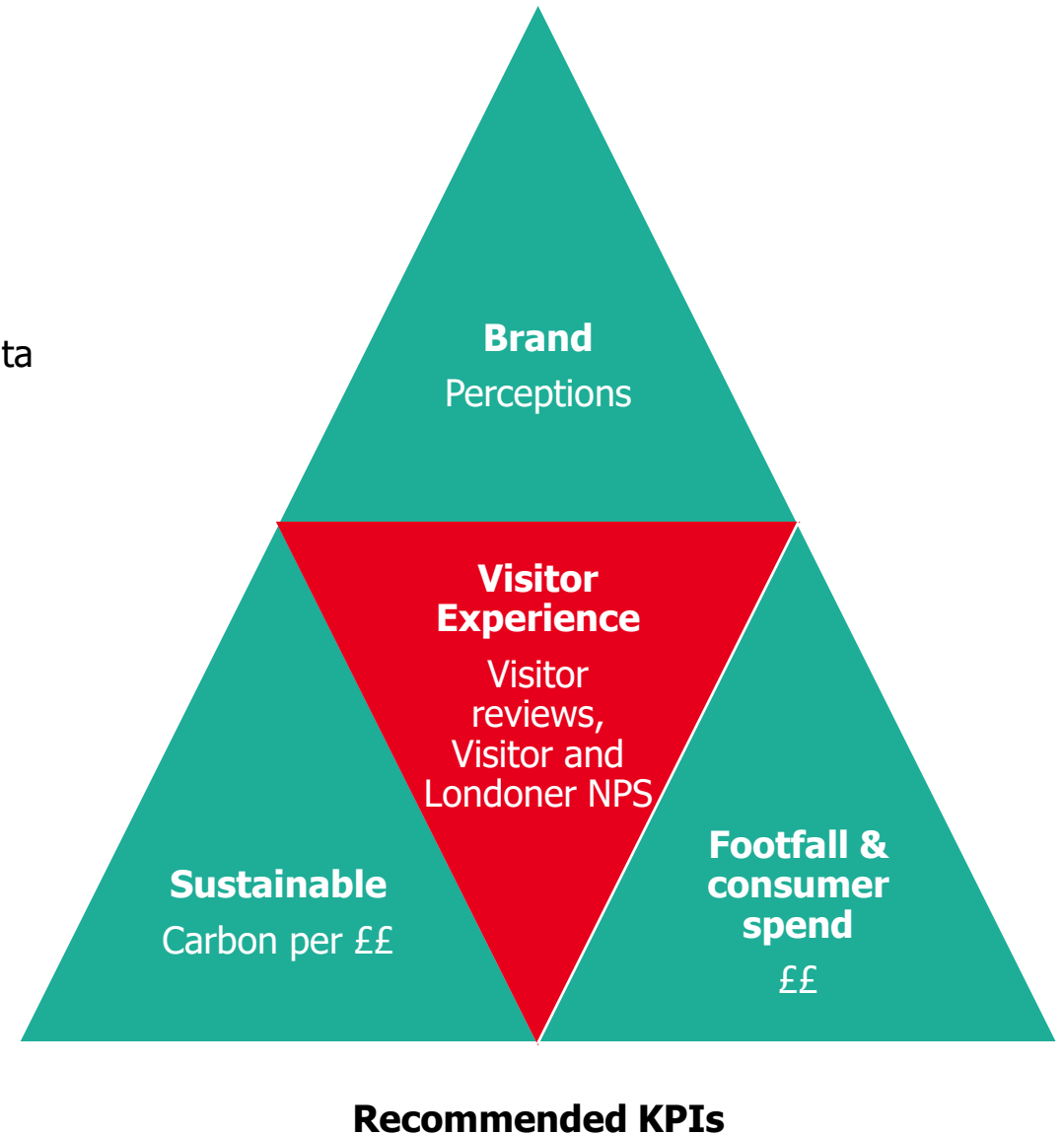
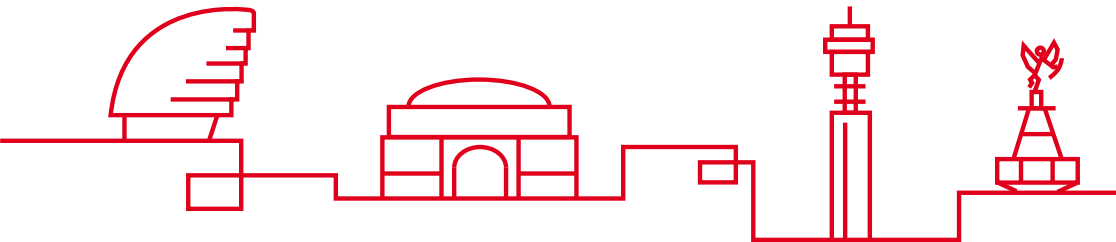
DELIVERY CONSIDERATIONS

Measuring success and roles and responsibilities



Measuring success

- We do 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



The role of London & Partners and industry

	London & Partners	Tourism Industry
Essentials Pan-London infrastructure controlled by multiple, mostly public sector stakeholders	<ul style="list-style-type: none"> - Raise profile of issues - Convene stakeholders - Coordinate collective action with industry 	<ul style="list-style-type: none"> - Lobby policy makers to develop key visitor infrastructure - Support city wide visitor infrastructure programmes - Provide data to build business cases and measure performance
Experiences Controlled by individual organisations	<ul style="list-style-type: none"> - Attract new experiences - Provide insights to help existing experience owners shape product. 	<ul style="list-style-type: none"> - Address key customer problems that lead to low visitor satisfaction - Consider visitor trends and city product strategy when developing new experiences - Share visitor satisfaction data with wider industry
Places Controlled by groups of local stakeholders including local authority, landowners/developers, BIDs and anchor tenants	<ul style="list-style-type: none"> - Support places with strategy and brand development - Find new products/experiences, support place product development strategy - Help drive footfall - Win major events to animate city and brand 	<ul style="list-style-type: none"> - 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 are London's brand guardians.	<ul style="list-style-type: none"> - Define the London wide city brand - Communicate through own messaging and support industry to be on-brand. 	<ul style="list-style-type: none"> - Align to wider London brand across pre-visit and in-destination messaging to visitors
Data Collaborate to use the same data sources and save ££	<ul style="list-style-type: none"> - Form and manage 'data trust' collective - Coordinate and contract with data suppliers - Generate insights on behalf of industry 	<ul style="list-style-type: none"> - Contribute data / ££ to access data and insights

Guiding principles of delivery

Prioritisation and collaboration will be the keys to successful delivery

Audience first	Led by visitor data and a visitor's missions and mindsets
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 & affordable	Identify small quick wins – not everything requires significant budgets.
Realistic	Some of our aims will require significant funding. For example, you can't improve a 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

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THANK YOU

