



LONDON 2030

TOURISM VISION

LONDON
& PARTNERS

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Foreword

Tourism is a driver of London's economy and one of the cornerstones of our diverse, vibrant, global city.

Our world-class cultural offering attracts visitors from all over the world as well as being a major reason that companies continue to invest in London, while our hospitality and leisure venues provide memorable experiences and unparalleled levels of service to Londoners and visitors. A huge number of global companies also convene here to share knowledge and best practice at the many incredible conference venues that we boast.

Crucially though, for our residents and communities, tourism is also both a source of employment and an important part of what makes London such a great place to live.

We all know that the last few years have been particularly tough on our tourism industry. Not only then is it the right time to do this piece of work, but it also allows us to build on how well the tourism community came together during the coronavirus pandemic and worked collaboratively for the benefit not just of their own businesses, but London's economic recovery.

This Vision is grounded in that principle and is a chance to look to the future and really consider the challenges and opportunities that lie ahead. Fundamentally, I think that this Vision goes to the heart of the type of city we want London to be.

We want it to be resilient, inclusive and sustainable. We want it to be a place Londoners are proud of, and that welcomes and entertains people from across the UK and beyond. And we want it to continue to be a world-leading, global city whose history, culture, diversity and innovation are showcased.

This Vision is exactly that – a framework and guiding set of principles which will allow all of us who have a part to play in this great industry to create our strategies with a common goal in mind.

I am looking forward to taking these next steps together.

Sadiq Khan
Mayor of London



Introduction

So much has changed since London created its last tourism vision in 2017. Brexit, climate change, coronavirus, digital transformation – and the way that behaviours have responded to each – mean that we are now adapting to a fundamentally different environment.

For London, as a truly global city, the loss of our domestic and international visitors, conferences and events hit our tourism industry harder than most. But London has always been resilient, able to adapt and to innovate. It is a restless city, always striving to be better.

This is our London 2030 Tourism Vision.



It brings together the insights and ambitions of the breadth of our industry to describe clearly what we, together, want London's tourism to look like in 2030. It is a description of a sustainable, resilient and inclusive future. **It is an invitation to write London's next chapter, together.**

Our next task is to build strategies for each of our individual organisations, and a joint London-wide plan. The Vision will be the common foundation for those strategies and they must be aligned because the challenges and opportunities ahead can only be met if **industry and policymakers are all pulling in the same direction.**

Our shared view of the future is based on extensive research, stakeholder roundtables, a written consultation and analysis. Organisations from across the industry have contributed. In the process, a clear consensus has emerged. We have a “north star” that we can use to make choices.

We will make the tourism experience the absolute best it can be – for visitors and for Londoners. London has always been about experience; our unique selling point is that we have a remarkable mix of history, innovation and culture, which means there really is something for everyone. Whether that be iconic or innovative, how we experience this city is what drives the value of tourism.

Experience encompasses everything. How a city makes us feel to live, work in or visit. How every element or touch point is part of a bigger, interconnected place. And how all of that is shared and reflected through London's brand and values.



To take our tourism experience to an even higher level will require a new approach. We now understand that the true value of tourism to our city goes beyond economic metrics. It is deeply woven into the fabric of what London is and our long-term prosperity and wellbeing. We need to gauge success by the quality of experience for our communities and visitors; tourism benefiting all Londoners, and the costs of tourism being minimised and shared.

This Vision sets out four key pillars to underpin experience:

- 1. Managing the destination** – how we expand our offer, improve data sharing and visitor knowledge.
- 2. Maximising our impact for Londoners** – how our industry drives positive change for London and Londoners.
- 3. Leading in sustainability** – how tourism plays its part in supporting London and the UK's goals.
- 4. Redefining our measure of success** – how we measure impact and shape future growth.

During our work with industry colleagues on this Vision, we have begun to think about how London & Partners should respond to the challenge it lays down to us as the city's business growth and destination agency.

We make the following commitments:

Championing the vision: supporting businesses and organisations in London who work in or adjacent to the tourism industry. To share guidance and facilitate knowledge sharing across industries and policymakers to improve outcomes. To help make tourism in London a world-leading industry delivering value for visitors, Londoners and the UK as a whole, by continuing to coordinate industry action.

Increasing the communication between organisations: working to bring together organisations across London to collaborate more freely and openly in order to help create a seamless and dynamic destination that provides the best experience for visitors from start to finish.

Providing timely information and insights: sharing up-to-date information and insights via our communications, newsletters and events making sure businesses and organisations can respond to the latest trends.

Developing the London brand: creating a cohesive narrative around our city's strengths and values, helping us uniquely position London as an innovative, inclusive and iconic global city.

Promoting London: providing best-in-class marketing and communications support, delivering PR, campaigns and bids that will attract visitors, events and conferences, showcasing the vibrant culture, venues and dynamism that make this city unique.

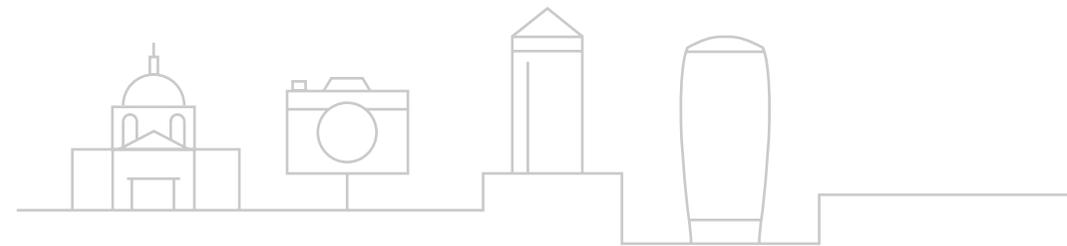
As we move forward together, we acknowledge there are barriers we need to collectively address, and more work to be done. We hope that the Vision provides the inspiration to begin that work and take us to 2030 and beyond.

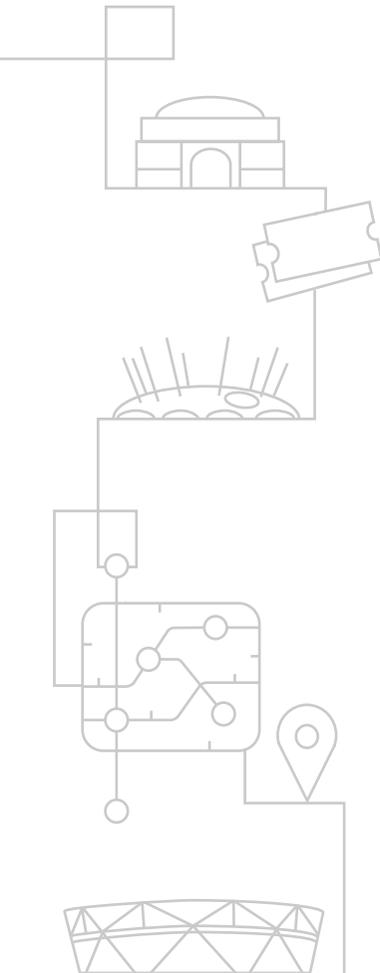
We would like to thank Tourism Economics and Stonehaven who have worked with us throughout, as well as to everyone and every organisation that have taken part.

The strategy process will continue. But this Vision sets out a clear ambition for what tourism can and should be for our city – a driving force for sustainable, resilient and inclusive growth.

Rose Wangen-Jones

Managing Director
Marketing, Destination & Commercial
London & Partners



London will be a brilliant experience for visitors and Londoners alike. To experience London will be to feel our values and to live our brand – it is at the heart of who we are as a city.

A visitor's experience starts with inspiration, a desire that drives their choice to make their booking. It continues through the welcome on arrival, all the way through to how they enjoy our vibrant culture, hospitality and retail, the quality of our conference and events venues, and the safety and accessibility of our city.

That is true for Londoners as well. Tourism isn't just something that happens in our city. It is a fundamental part of what makes our city great. It supports our cultural institutions and our restaurants, creates jobs and builds diversity. Tourism makes our experience as Londoners richer, better, unique.

This Vision makes experience the "north star" for London tourism in 2030 and sets a clear direction to inform our strategic choices to get there through four pillars:

- **Managing the destination.**
- **Maximising our impact for Londoners.**
- **Leading in sustainability.**
- **Redefining our measure of success.**



THE VISION

01

**Managing
the destination**



02

**Maximising our
impact for Londoners**



03

**Leading in
sustainability**



04

**Redefining our
measure of success**



01

Managing the destination

A VISION TO:

- Broaden the London experience
- Improve visitor knowledge and data sharing networks
- Make tourism accessible to all



Broaden the London experience

The London experience in 2030 will build on our mixture of the iconic and the new. Underpinned by our rich cultural heritage, the London experience will drive reputational and brand value, develop and evolve London's offer, and be accessible for all Londoners and visitors. This offer will also look to the future, embracing innovation and technology, which will ensure that London remains at the forefront of global tourism.

That experience will reflect the importance of tourism both to visitors and to Londoners. Leisure visitors will have ease of access, new discoveries, and a high-quality experience that leaves them feeling relaxed, valued and entertained.

Londoners may be looking to learn and see something new in their free time – whether that's a dedicated holiday or a few hours spare in an evening. By 2030, we will have broadened the spectrum of opportunity, meaning a greater range of visitors who can find a true connection to London and can return time and again to both well-known and more off the beaten track attractions.

By 2030, we will have expanded the capital's offer by opening up more parts of London for longer each day. That will give space to visitors without reducing numbers, and simultaneously deliver for tourists and businesses, and Londoners who can take advantage of major attractions before or after their workdays. It will also distribute the impact of tourism across the day, and across communities, improving the experience for visitors and communities alike.



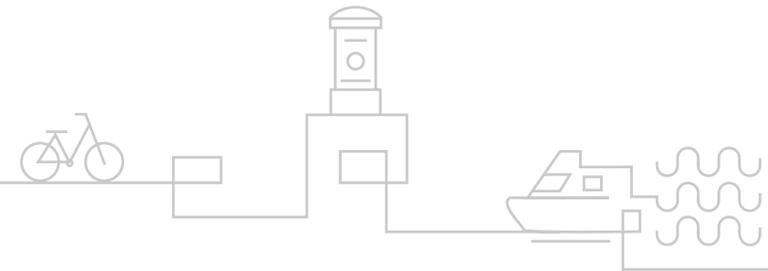


In 2030, the London experience will be a vibrant mix of large and small, independent and institutional, and historic and new. One of London's greatest strengths is the balance between historic attractions, world class family days out and independently owned venues.

Those independently owned venues bring a range of benefits to London for visitors and Londoners. They create vibrancy and energy, and broaden the offer across the day and into more geographies and communities. They also embed the economic benefit of tourism within the city, with more entrepreneurs and communities able to benefit from the profitability of the industry.

In 2030, we will have sustainable visitor numbers and visitation dispersed across a wider range of visitor districts around the city and across more of a 24-hour period. That will open up access and improve the quality of that access. We will have reinvested in better, greener infrastructure to allow Londoners and tourists alike to make the most of the city.

Our experiences in 2030 will be reflective of the diverse nature of London, its communities and visitors, ensuring that everybody sees themselves, their friends and families reflected in its tourism offer.





Improve visitor knowledge and data sharing networks

Better data sharing can transform the London visitor experience, by giving visitors better information about what is happening and where, and giving industry better information about the behaviours and demand of those visitors.

In 2030, London's strong global position as a tech leader will mean that we will have established ourselves as experts in using data to inform the tourism industry. This requires a supportive regulatory environment, which recognises the power of business to innovate towards common goals, while protecting data privacy. London's tourism industry should be aligned with London's Emerging Technology Charter.¹

As a practical example, data could empower tourists to choose to visit attractions at non-peak times and to choose lesser-known and independent attractions at busy times. Better knowledge can also enable visitors to optimise their journeys and their experience of attractions once they arrive. From reducing queues to smoothing peak/off-peak cycles – which have become increasingly concentrated by post-pandemic patterns of travel – both Londoners' and visitors' experience of the capital can be improved.

¹ Mayor lays out pathway for ethical use of future technologies | London City Hall





Make tourism accessible to all

By 2030, data will have transformed the accessibility of London's tourism offering. In 2030, there should be a central database for accessibility information, with customers with disabilities not having to rely on incorrect or outdated information.

This lack of information visibility affects supply. Creating accessible venues and places to stay is often capital intensive, and without consistent and effective ways of reaching a customer base, the risk may be too great.

Mobility and travel needs are diverse with accessibility levels varying across the city. Our Vision is that by 2030 visitors and Londoners will experience a truly accessible city.

Smart systems can not only help smooth the way with accurate, live and easy-to-follow information, but they can also help both business and leisure users with different needs to share road and public transport networks efficiently.

Beyond mobility, by 2030 our Vision will also address neurodiversity, understanding that everybody experiences London in a manner that is unique to them.



Proposals

- 01 Broaden and diversify capacity and improve real-time visitor information, to increase visitor duration and thereby providing a less crowded and better experience.
- 02 Foster a truly 24-hour economy – supported with increased access and opening hours, balancing community needs with visitor experience.
- 03 Provide live visitor information on wait times at major attractions and other useful information to help tourists self-manage their demand and disperse across off-peak times.
- 04 Improve accessibility and connectivity to create seamless end-to-end journeys for all visitors.



02

Maximising our impact for Londoners

A VISION TO:

- Create rewarding careers – better jobs, better training, better pay
- Enhance the sector's reputation as a driver of social mobility
- Foster a virtuous circle – in which employees take pride in London's offer, creating a better customer experience



Benefit
SAN FRANCISCO

Laughter is the best cosmetic

WILKINSON



SHOP ONLINE AT OFFICE.COOLUK

Create rewarding careers

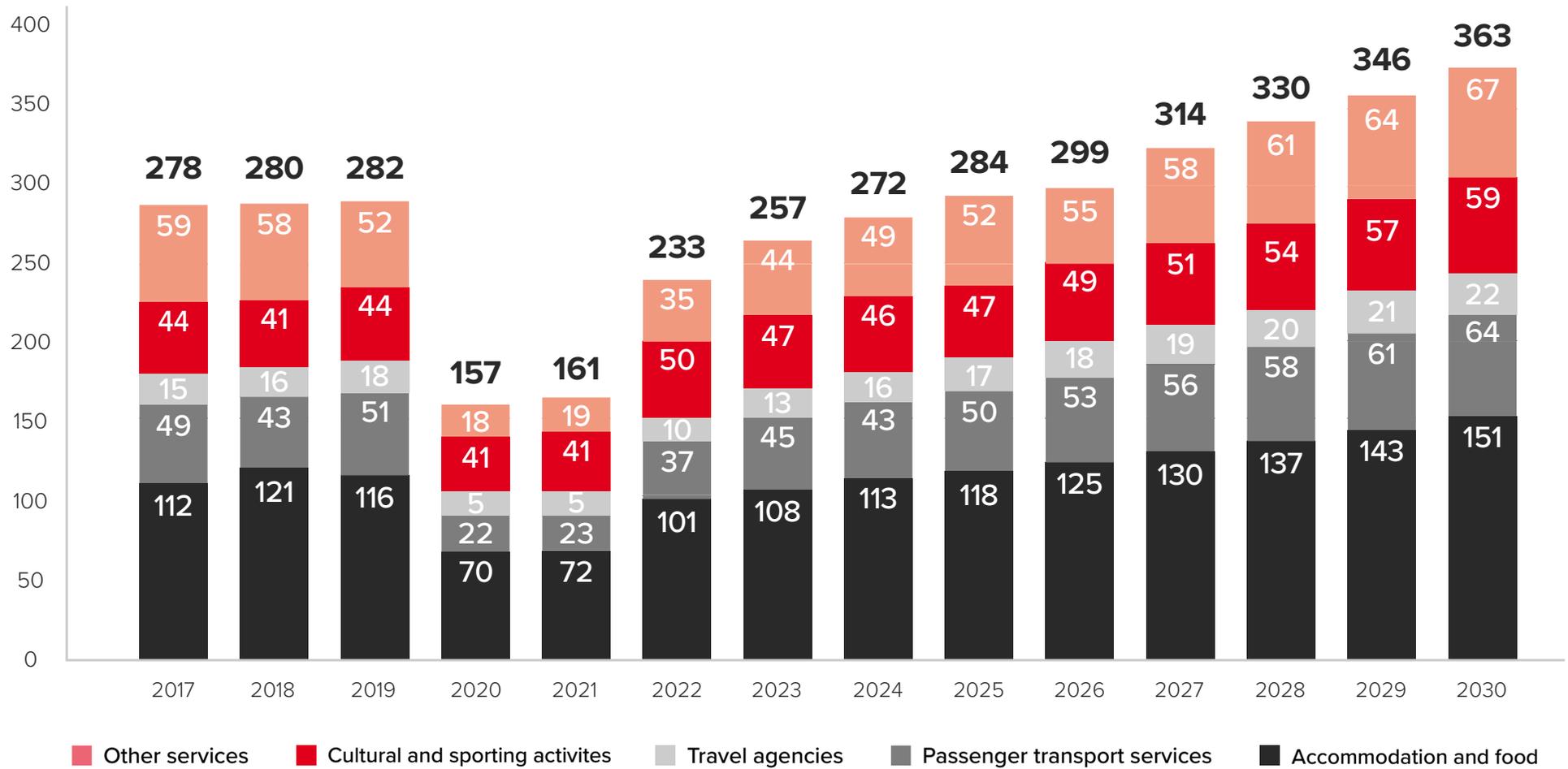
This Vision sees tourism in 2030 as playing a key social role by helping to drive improvements in London, for Londoners, that deliver for businesses and integrate visitors. Culture, hospitality and wider tourism already play an important role in the liveability of London, with residents benefitting from the cultural assets that the industry provides.

In 2030, Londoners will view tourism as a core part of their city's identity, because engagement has increased, with Londoners seeing tangible benefits of the industry including as a source of good jobs and rewarding careers.



London: labour requirement by sector in tourism

Thousands



Source: ONS, Oxford Economics, Tourism Economics

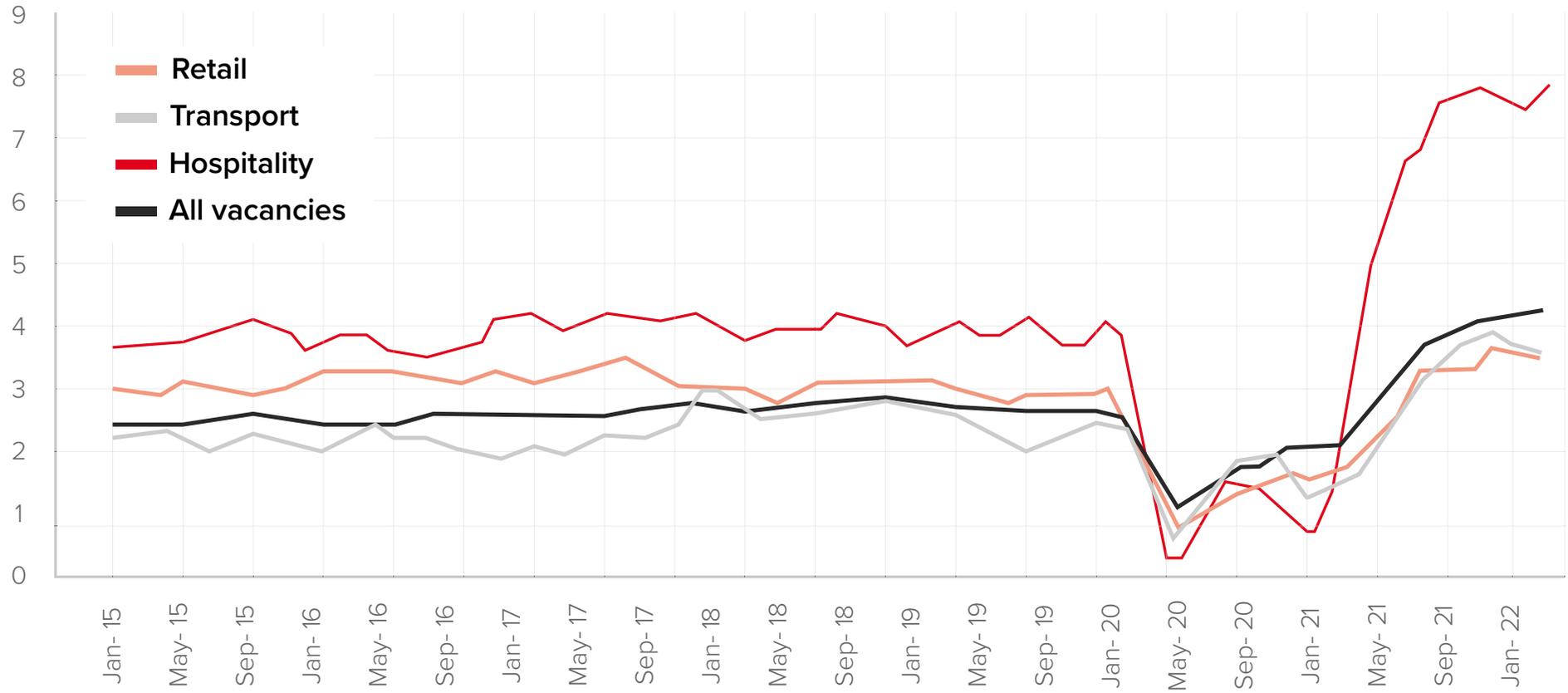
Creating rewarding careers also impacts visitor experience. In 2030, motivated and proud staff are an asset to the industry, leading naturally to an improved customer experience and through that, greater productivity and profitability.

Today, London tourism risks a long-term staffing crisis. There are too many jobs available with too few people to maintain the sector. By elevating the status of careers within the tourism economy, the industry can connect with Londoners who are eager for well-paying jobs with career development prospects.



UK: vacancy rates by sector

Vacancies per 100 jobs



Source: ONS, VACS02: Vacancies by industry, Tourism Economics



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Enhance the sector's reputation as a driver of social mobility

Historically, tourism and hospitality have been an important route into skilled and leadership roles for workers from diverse social and economic backgrounds, as well as an important employer for people arriving in the UK to work.

The hospitality sector is particularly upwardly mobile as an industry, with the greatest proportion of senior managers who started off their careers in entry-level posts rather than via university education. Our Vision is that in 2030, perceptions of hospitality jobs will have been improved by a conscious effort to tell success stories and cultivate hospitality as a long-term profession, illustrating the career progression available and the satisfaction that comes from connecting London to the world, and being one of the contributors to the experiences visitors will treasure for a lifetime.

The industry and education sectors should come together to provide training to get more Londoners into fulfilling, career-defining roles. By creating the right opportunities while simultaneously leveraging technology to fill skills gaps and free workers to perform more rewarding and high-skilled roles, businesses will be more efficient and make more money while improving experiences for Londoners.



Proposals

- 01 Improve the link between education providers and employers: educate school leavers about, and connect them with, opportunities in tourism sectors.
- 02 Agree and align on the most relevant qualifications that encourage people to fill high-skilled needs and elevate the prestige of a career in the industry.
- 03 Trumpet the success stories of those building careers and tourism businesses in London.
- 04 Leverage technology to fill skills gaps and create roles that focus on value-add contributions to overall experience.



03

Leading in sustainability

A VISION TO:

- Leverage London's role as a gateway to other destinations, improving the carbon efficiency of tourism and contributing to UK economy
- Make London one of the greenest cities in the world, whose growth is enhanced by its green credentials
- Support jet zero ambitions





Make London one of the greenest cities in the world

The Vision supports the Mayor of London's aim for London to be a zero carbon city by 2030. That means a focus to deliver on London's ambition to be one of the greenest cities in the world, from the moment of arrival to the moment of departure.

As a global city, London will continue to attract visitors from around the world, and in 2030 we will see that trend continue with enormous potential financial benefits. However, those visitor numbers and spend must also be set against our sustainability obligations, meaning that the carbon efficiency of an entire visit will be a key marker of success in 2030.

Our goal will be to create the highest economic benefit per kilo of carbon generated, with net zero domestic transport and sustainable accommodation and attractions making it a green experience for all.

Business tourists often have heightened corporate awareness of sustainability concerns and increasingly, corporate policies to match those values – a trend London should do everything to encourage and respond to. In contrast, we know that tourists want sustainable options but are overloaded with choices and face pressures on their budgets to travel, particularly for leisure visitors.

Data is critical to better signposting and prioritising sustainable travel options for consumers, from promoting sustainable attractions to showing greener and more active travel options. For businesses managing carbon travel budgets, more transparent information about the carbon cost of travel and hotel emissions has improved sustainable decision-making in 2030.



In our Vision, London has responded by cutting down on carbon and waste, with individual businesses taking responsibility for their own paths to net zero. For example, UK Hospitality's Net Zero roadmap considers sector emissions hotspots, decarbonisation opportunities and practical steps for setting net zero goals.² The wider industry is also considering the impact of food waste, consumption and recycling.

In 2030, we will have supported the realignment of London's streets and parks for pedestrians and cyclists, helping visitors walk and cycle more, and use motor vehicles less.

The Vision wants to identify where environmental considerations are an opportunity for green growth. That means thinking about how we can support and deliver smart infrastructure and business practices that benefit Londoners and visitors alike.

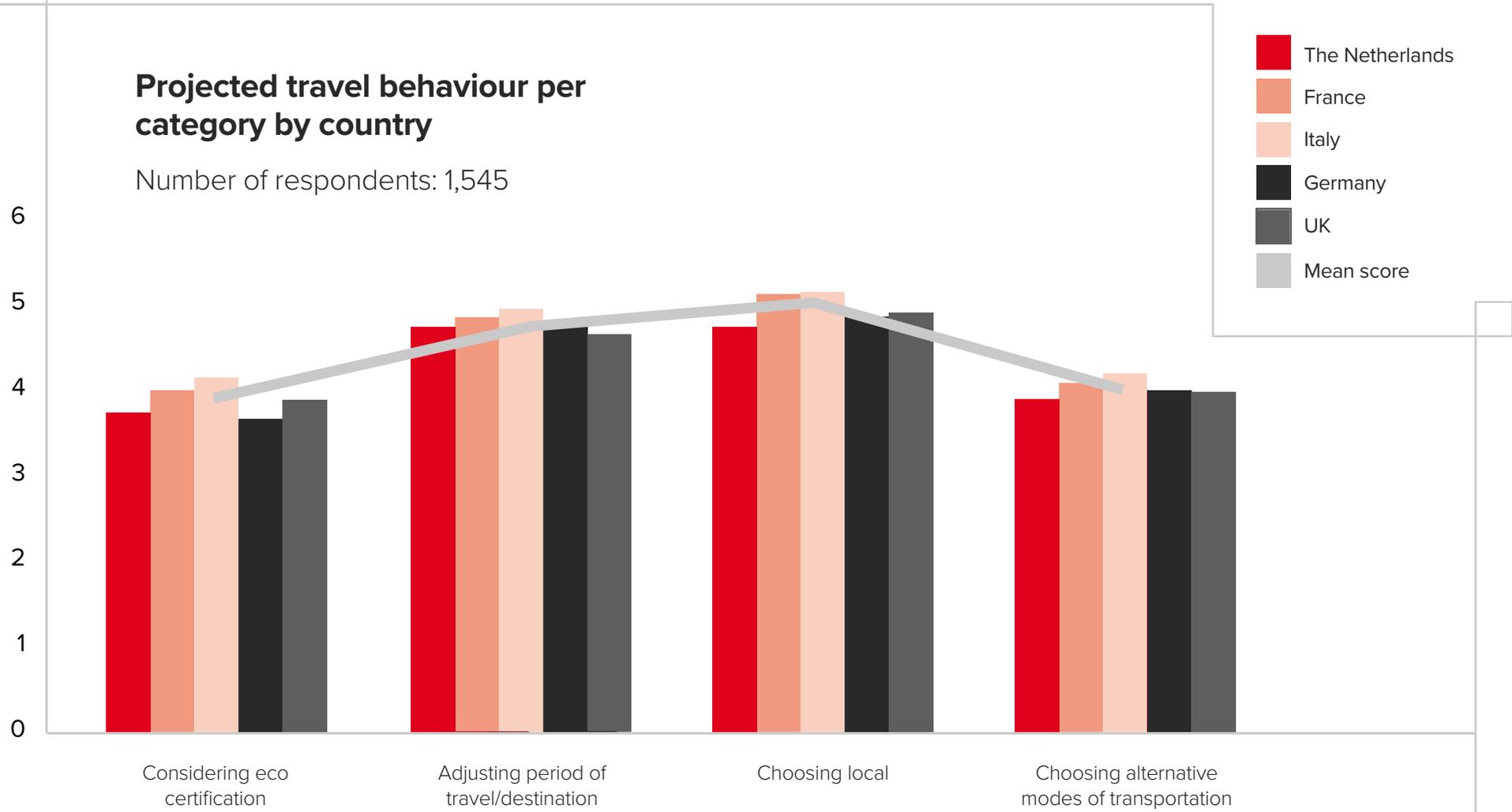
Today, the tourism industry is acting ahead of demand for greener travel and that is the foundation on which a Vision for sustainable tourism can be built. By 2030, we will have embedded all these sustainability efforts into the fabric of our city and industry, giving leisure and business tourists a seamlessly sustainable experience, in which London continues to innovate and take green solutions to market. Importantly, Londoners will benefit too, from cleaner air to better connectivity.

² UKHospitality, Net Zero Roadmap



Projected travel behaviour per category by country

Number of respondents: 1,545



Average score on a likert scale of 1 to 7 (1) = Not likely at all (6) = Extremely likely

Source: ETC (chart constructed), via Tourism Economics

Leverage London's role as a gateway

The carbon efficiency of a visit is not limited to a stay in London. Using sustainability as a pillar of our future strategies allows us to consider London's tourism within the context of the wider UK and wider Europe.

In 2030, London has increased its role as a gateway to the rest of the UK and beyond. This means that London enables visits to multiple destinations, both within the UK and in continental Europe, in order to specifically maximise the carbon efficiency of visits to London.

Therefore, this Vision seeks to encourage longer stays in London itself, as well as positioning the city as the best long-haul destination from which to access other parts of the UK and Europe. This is equally applicable to both leisure and business tourism.

Specifically from a UK perspective, this gateway approach would have a positive impact on, UK economy in 2030. It is estimated that today, "London gateway" travel accounts for 12.3% of all visits to the rest of the UK and is associated with £1.9bn spending in parts of the UK outside London. That figure can grow.

In order to achieve this, it is imperative to encourage visitors to choose low emission options such as rail over air travel for journeys to and from London, across the UK and Europe.

By 2030, work should have taken place to establish rail or emerging low emission/ carbon neutral forms of transport as the options of choice for visitors bookending their travel via London.

London gateway as a share of rest of the UK inbound travel

2.8M

VISITS



15.6M

NIGHTS



£1.9BN

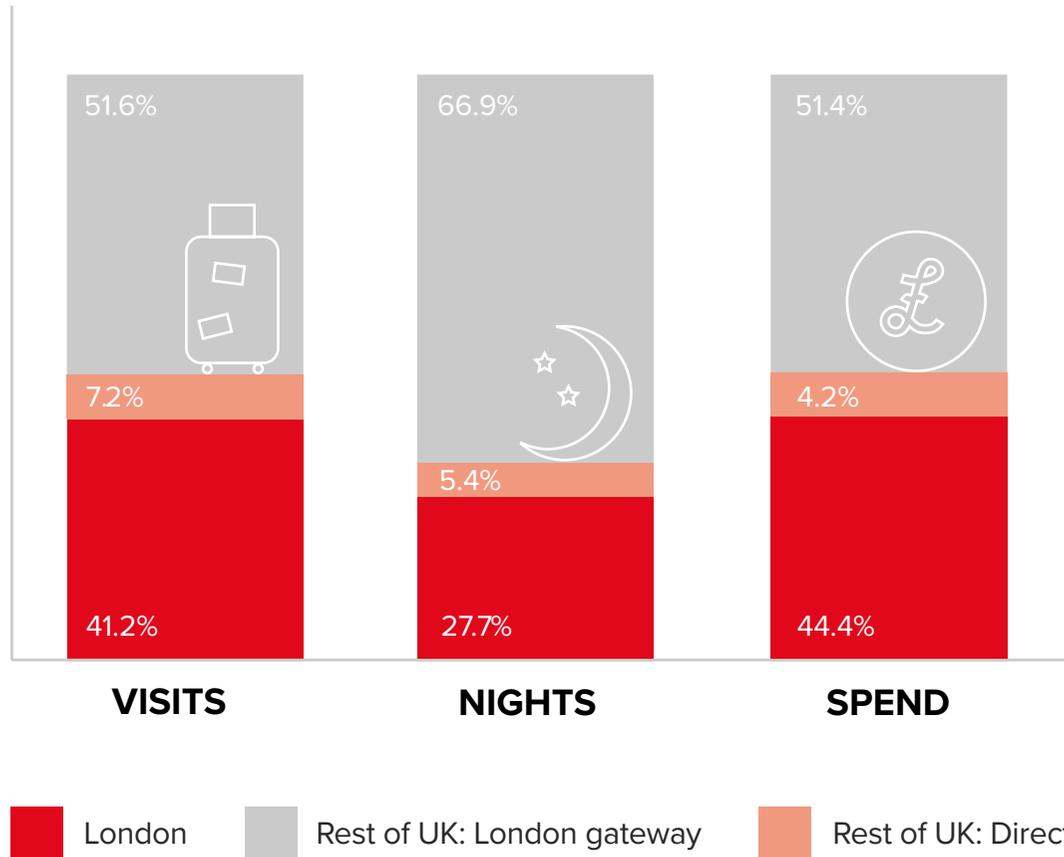
SPEND



Source: Tourism Economics

Shares of UK inbound travel

London, London gateway in the rest of UK and rest of UK direct



Source: Tourism Economics



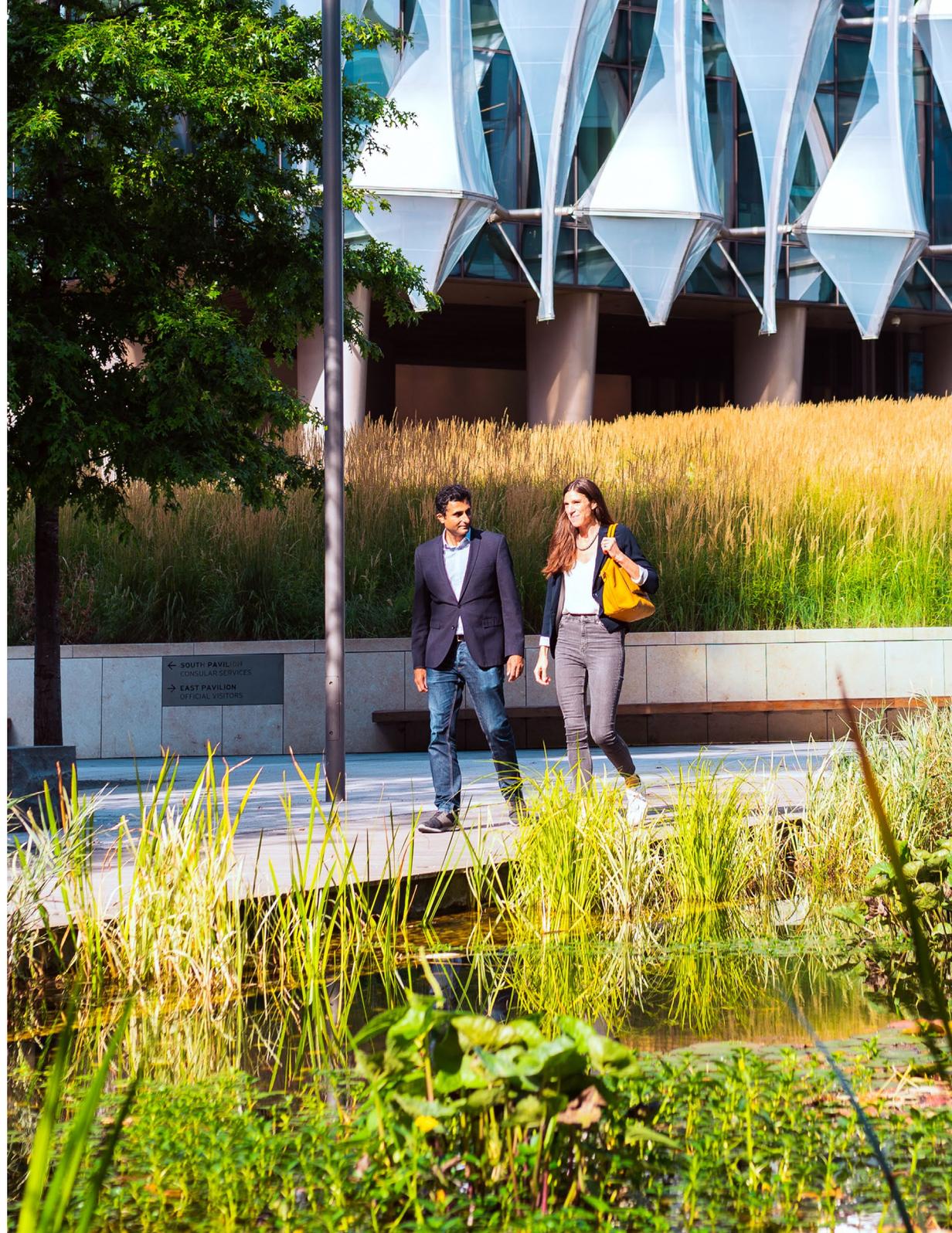
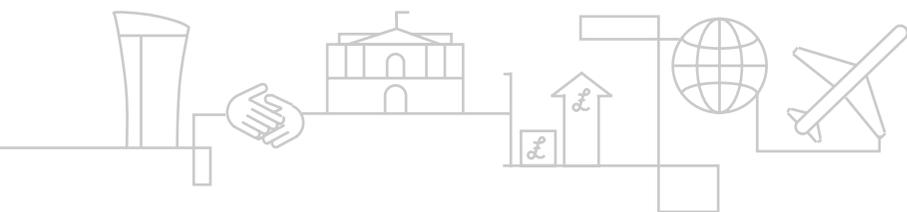
Support jet zero ambitions

As an island, a significant number of visitors will need to access the UK by plane. This represents a significant environmental challenge until the aerospace sector can deliver on jet zero ambitions.³

Our Vision for 2030 needs to be a bridge from today's travel model towards a zero carbon future. To do that, London will need the infrastructure (such as storage and production for sustainable aviation fuel) required for airlines serving our city and country to make jet zero a reality.

While the solutions are beyond the scope of our Vision, the tourism industry can support and help make jet zero a reality.

³ UK Government 2020, jet zero strategy: delivering net zero aviation by 2050



Proposals

- 01 Improve connectivity and signposting throughout the city so that London is one of the greenest cities from arrival to departure.
- 02 Increase the attractiveness for those combining business and leisure travel, for lower carbon journeys and longer stays.
- 03 Develop marketing strategies that encourage longer stays by using London as a gateway to the UK and Europe.
- 04 Make sustainable travel, such as rail, the option of choice for journeys across the UK and Europe, to and from London.



04

Redefining our measure of success

A VISION TO:

- Incorporate a new set of metrics and data points to support and enhance existing economic measurement and improve data sharing
- Identify and attract tourism source markets that will deliver both growth and resilience
- Shape future demand



Incorporate a new set of metrics

Incorporate a new set of metrics and data points to support and enhance existing economic measurement and improve data sharing.

The coronavirus pandemic has given us the opportunity to redefine what success looks like, the future we envision for our city, and how we measure it.

Pre-pandemic, tourism was considered primarily through an economic lens. However, there is now a greater appreciation of the true value of tourism to our city, and how deeply it is woven into the fabric of our experience of London.

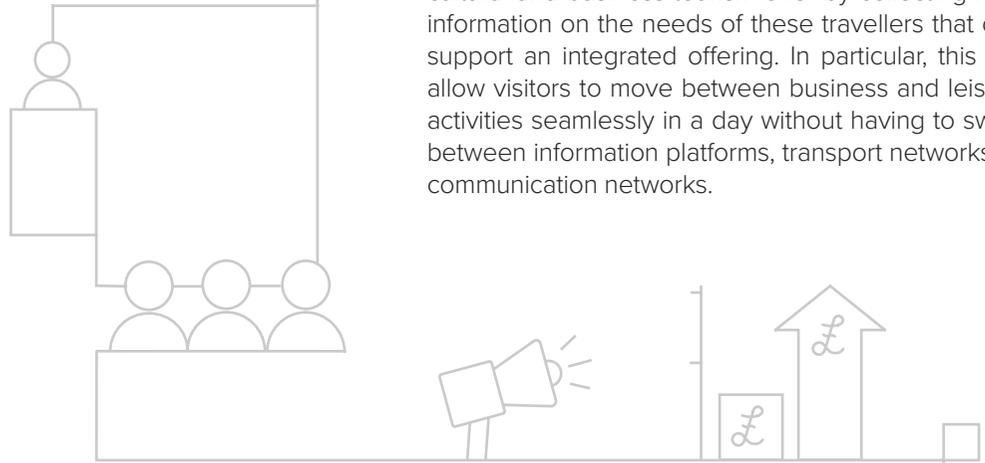
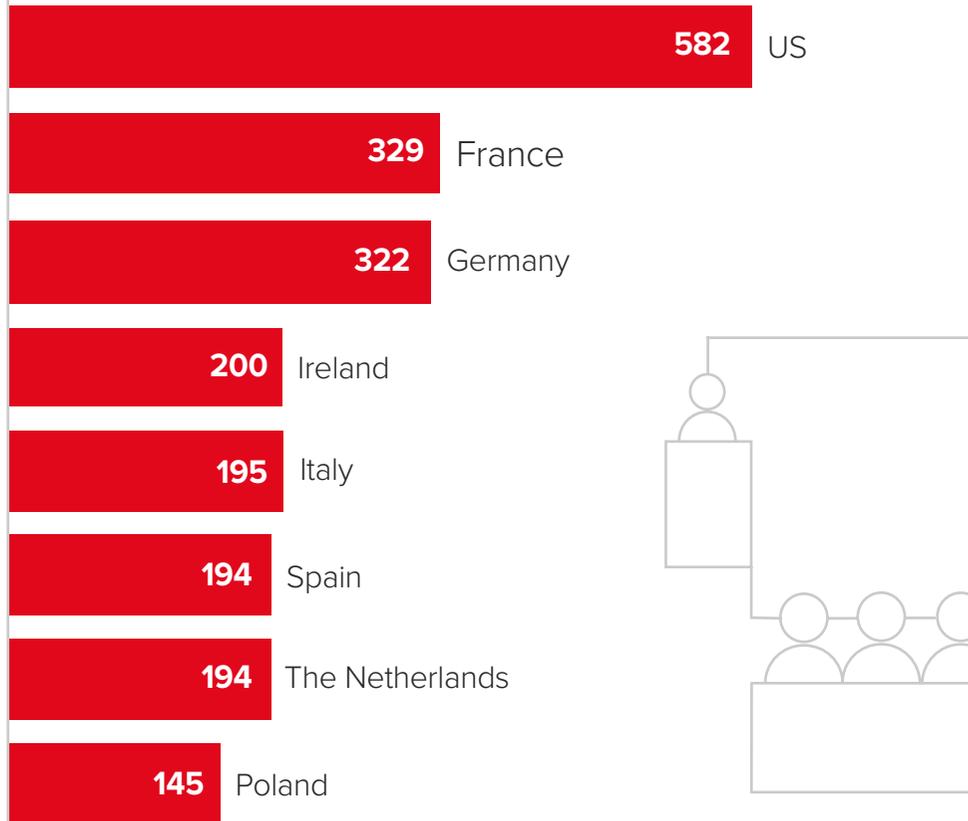
By 2030, we will have gone beyond traditional volume benchmarks to provide the highest-quality tourism package that delivers both commercial and experiential value that also enjoys the support of Londoners. These benchmarks will include social, environmental and experiential factors such as:

- **Reputation:** sentiment measure
- **Experience:** Net Promoter Scores (aligned to the key areas of focus in this Vision e.g. 24-hour economy, transport etc, as well as the overall experience)
- **Economic:** spend per visitor
- **Duration:** average length of stay
- **Environmental:** carbon per visitor spend



London's top business visits source markets, 2019

Thousands



Additionally in 2030, the industry should consider creating a citywide, anonymised dashboard of strategic data which will allow businesses and organisations to see a balanced scorecard of the city's tourism health.

In turn this will allow the industry to be more flexible and agile, further improving its resilience. On the supply side, data sharing networks will empower businesses to work together to systematically leverage London's existing assets and enhance the city's tourism offering.

In 2030, combining business and leisure or "bleisure" will be a larger segment than is currently the case.

London can build on the strengths of its combined cultural and business tourism offer by collecting new information on the needs of these travellers that can support an integrated offering. In particular, this will allow visitors to move between business and leisure activities seamlessly in a day without having to swap between information platforms, transport networks or communication networks.

Source: Tourism Economics and LPS

Identify and attract growth markets and resilient visitor mix

The Vision is mindful of the competitive landscape. London has always been a world-leading destination: in 2019, London achieved the greatest number of bed nights among its European city competitors according to the CityDNA Benchmarking Report, and it maintained that title in 2021.³

Nonetheless, the coronavirus pandemic disrupted the status quo in a way that has yet to fully settle, with competitors spending heavily to recover.⁴

London cannot rest on its historic laurels. London's comparatively high proportion of international visitors was thrown into stark relief when restrictions came in – particularly in comparison with competitors like New York City, where close to 80% of visitors are from domestic markets.⁵ London's proportion of domestic visitors increased during the pandemic, but the proportional increase was nowhere near enough to balance out the impact of the lost international tourism.

This Vision for a more resilient future includes developing the city's domestic tourism offering and marketing – not only increasing this audience but increasing London's connections (both cultural and commercial) with the rest of the UK, benefiting both.

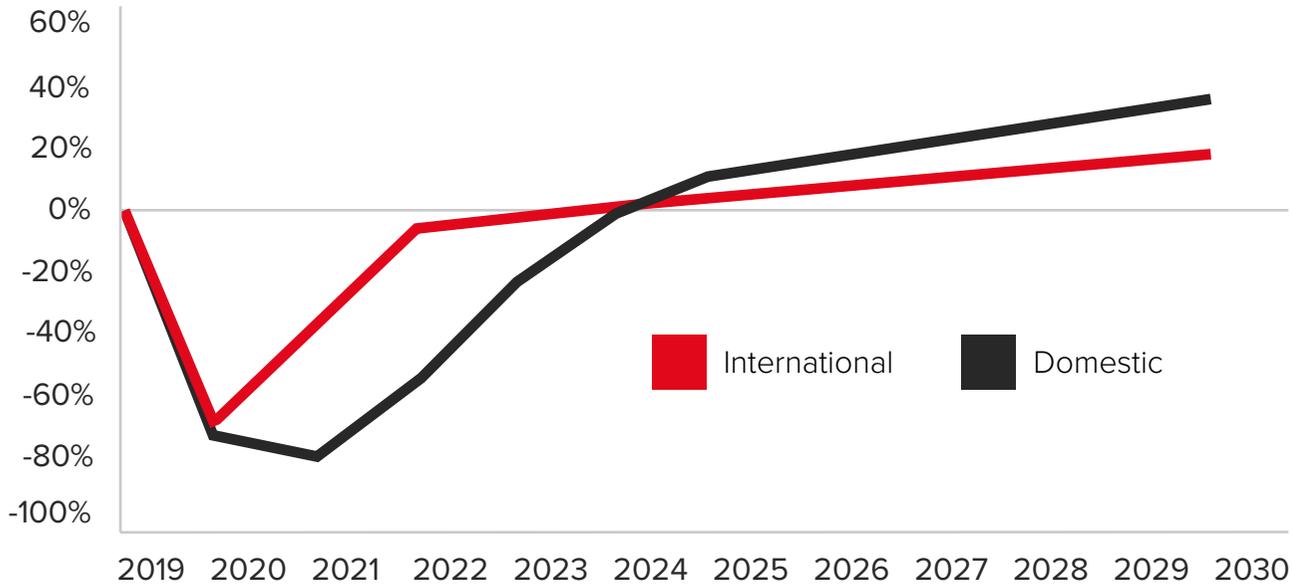
That means understanding where London's growth is going to come from and, importantly, what growth we want to target to achieve the balance of outcomes that this Vision proposes across social, environmental and economic factors.

⁴ CityDNA Benchmarking Report

⁵ France committed to a €18bn rescue public fund, while New York City launched a \$30m recovery campaign.

⁶ Office of the New York State Comptroller, 2021.





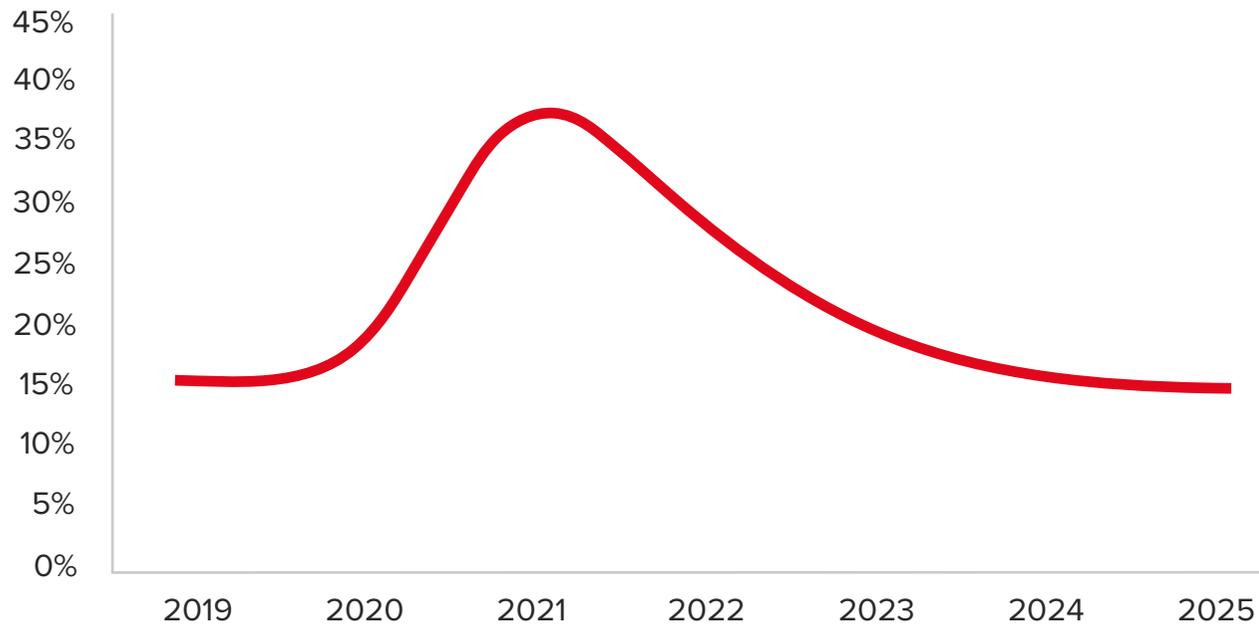
London nights: domestic versus international

Amounts in percentage change since 2019

Domestic proportion of nights

% of total

Source: Tourism Economics

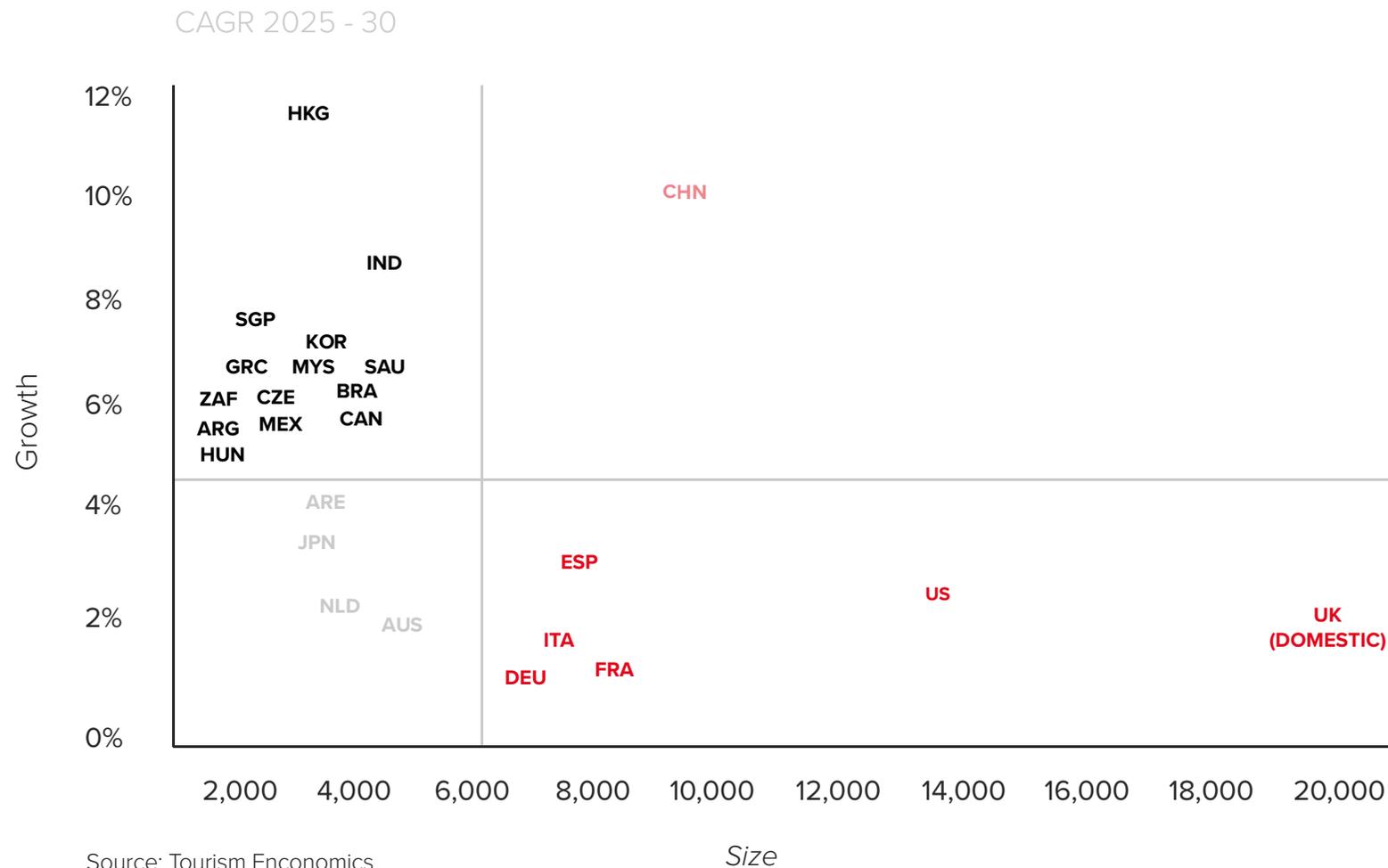


Source market comparison: size versus growth

Selected markets ranked by size and growth potential, 2030

Markets

STABLE GROWTH UK - United Kingdom US - United States FRA - France ESP - Spain ITA - Italy DEU - Germany
LARGE GROWTH CHN - China
SMALL GROWTH IND - India SAU - Saudi Arabia CAN - Canada ARE - UAE BRA - Brazil KOR - South Korea HKG - Hong Kong SGP - Singapore MYS - Malaysia GRC - Greece CZE - Czech Republic ZAF - South Africa ARG - Argentina MEX - Mexico HUN - Hungary
AUS - Australia NDL - The Netherlands JPN - Japan



Source: Tourism Economics

Note: Estimates exclude VFR travellers

Nights in 2030, thousands



Tourism Economics' work shows that in 2030, London will have seen strong growth in overnight stays by tourists. With markets such as China and India forecast to grow dramatically, leading to a potentially significant increase in visits.

Our Vision is to manage both the growth of inbound visitors and the growth of the industry (and supporting infrastructure) that will welcome them, in tandem – so that the growth is sustainable for London and Londoners. The increased overall numbers therefore shows the necessity to spread visitation by increasing access to more parts of London at different times, creating opportunities for new visitors without overcrowding and compromising experience.

We will strategically assess each growth source to deliver place-specific marketing of London abroad with our goals of increasing nights spent in London per visit, and positioning London as a gateway to the UK and Europe, in line with our sustainability vision of generating the most value-add per kilo of carbon generated. All this work will be done with our brand and values in mind, attracting visitors who are aligned to the mindset of the city we want to be.

Shaping future demand

However, knowing where the growth may come from is not the same as shaping it towards a Vision of London. A Vision for London's future has to address the breadth of the city as a whole.

That means that in 2030, destination marketing of London as a city must play an important role alongside marketing of specific venues, hotels or attractions. We need a strong global brand that will stand out in an increasingly competitive market.

To be effective, we need to think of audiences in a different way as our customers' needs change, and target them accordingly.

We will need to go beyond demographic and geographic definitions and consider expanding audience segmentation to include understanding their mindset, and the curious, adventurous and green-focused nature of our audiences, who are aligned to London's values and brand.

It is important to acknowledge that creating a strong global brand will require sustained, long-term marketing support. Therefore, the Vision needs to create a long-term funding model (including public and private) to deliver effectively.





Proposals

- 01 Create a new pan-industry dashboard that improves data sharing, forecasting ability and measures tourism health.
- 02 Develop a destination management marketing strategy that is aligned to the Vision and understands the mindset of our future audiences, inspiring them to choose London as their destination and stay for longer.
- 03 Diversify London's visitor mix, improving resilience by increasing our mix of domestic (including Londoners) and international visitors.
- 04 Agree sustainable, long-term, public/private funding for marketing and destination development.



The role of policymakers

This Vision recognises the significance that government buy-in at national and local level has, not just to unlocking individual projects but even more critically, in creating the conditions for businesses and organisations to pull together in the same direction. To make the Vision a reality by 2030, government can support the major principles outlined at the start, joining up future planning, regulation, funding and legislation to allow businesses to deliver against the Vision points – which in turn deliver on key local and national government priorities.

In keeping with the Vision's focus on a dynamic, frictionless experience that puts Londoners and visitors first, there are two elements that require focus: delivering nationally, for all parts of the UK to benefit from tourism to London, and locally, for Londoners specifically to benefit.

Nationally, the largest area in which our industry cannot act without government partnership is infrastructure, which is particularly critical for the Vision's sustainability objectives. For potential domestic travellers – and inbound travellers wanting to connect to the rest of the UK – a primary concern is the expense and trip length associated with current travel options to the capital. Improving availability and reliability of rail and road infrastructure links between the rest of the country and London is critical. This can also unlock opportunities for supply chains, enabling more businesses from across the UK to supply the London tourism industry.

Locally, our tourism businesses are desperate to fill skilled roles, with real prospects for advancement and career development, but are falling victim to the current skills shortage, and partnership with our state education sector is crucial to a long-term solution. This means facilitating additional training and tailoring qualifications to match needs in hospitality and tourism and working together to improve links and awareness of opportunities in our industry.

The Mayor's Academies Programme ⁶ is already making these connections between employers and adult learning providers in the capital's hospitality sector and other key industries.

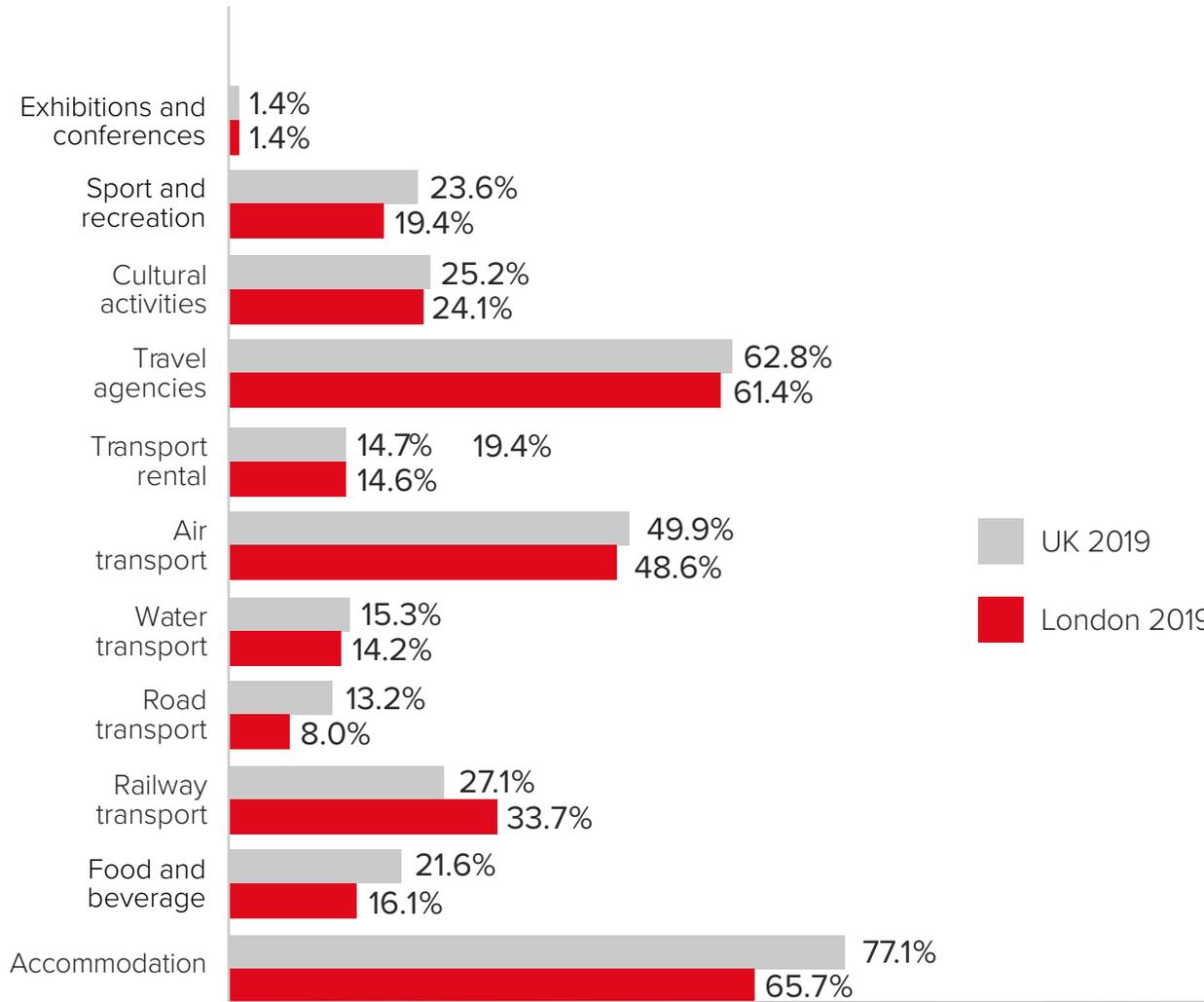
We want a future in which anyone, from any part of the UK, who wants an opportunity in London can find the training and links they need to access that in the sectors that comprise tourism in the capital.

More broadly, we need to work in close collaboration with government to keep London (and the UK) competitive as a place to visit, with sensitivity to how policy impacts visa applications, taxation and the accessibility of the UK compared to other destinations.

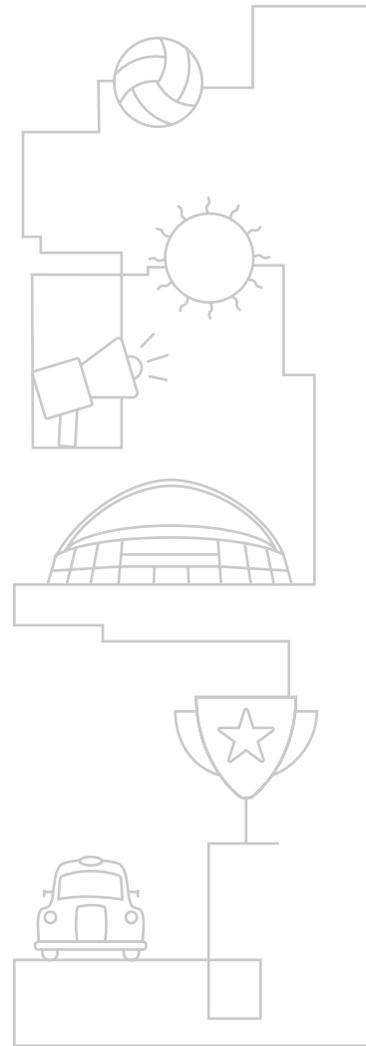
⁷ About the Mayor's Academies Programme | London City Hall

London tourism ratios compared to the UK, by sector

Share of sectoral employment attributable to tourism activity



Source: ONS, Oxford Economics, Tourism Economics



Bringing the Vision to life...

This Vision sets the course for a vibrant tourism offer that puts experience at its core. It provides common ground on which to build our individual strategies, defining the role each of us will play in making the Vision a reality.

It is important to acknowledge that the Vision can only be delivered if we move forward together. This is a call to every business and organisation in London to join with each other with the common understanding that if London is strategically aligned, everyone benefits.

There is work now to be done to truly bring this Vision to life. For London & Partners, the work will now begin to produce a destination management strategy that uses the framework of the Vision as its guiding principle. The hope and expectation is that this framework is adopted and used by all the different businesses and organisations that make up London's tourism industry.

What is for certain is that nobody can predict the future, but by being aligned around a common Vision the city's tourism industry can help make itself as resilient, inclusive and sustainable as possible.

In turn, that combination of stability and ability will allow London's tourism offer to evolve and prioritise experience through a combination of managing the destination, maximising our impact for Londoners, leading in sustainability and, ultimately, redefining our measure of success.



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Angel Business Improvement District
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BusinessLDN
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Camden Town Unlimited
Catalyst
Central London Forward
Centre for London
City of London Corporation
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Cross River Partnership
EasyJet PLC
Edwardian Group London
Eurostar International Ltd
ExCel London Limited
Expedia Group Limited
Gatwick Airport Limited
Greater London Authority
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Grosvenor Britain & Ireland
Heart of London Business Alliance
Heathrow Airport Limited
Hilton Hotels & Resorts
HS1 Limited
IHG Hotels & Resorts
London City Airport
London Councils Limited
London HQ Ltd (Northbank BID, Victoria BID,
Victoria Westminster BID, Whitehall BID)
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Made tourism marketing
Marriott Hotels Limited
Mayor of London
Merlin Entertainments
New London Architecture Limited
New West End Company (NWECC)
Olympia London (Olympia Management
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QEII Centre
South Bank BID Ltd
Team London Bridge Limited
TheCityUK
The Crown Estate
The Fitzrovia Partnership, Business
Improvement District Limited
Meetings Industry Association
The O2
The Royal Parks Limited
Tourism Alliance Limited (UK)
Transport for London (TfL)
Tripadvisor Limited
UKHospitality Ltd
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Virgin Atlantic Airways Limited
Visit Greenwich
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WeAreWaterloo Ltd (Business
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