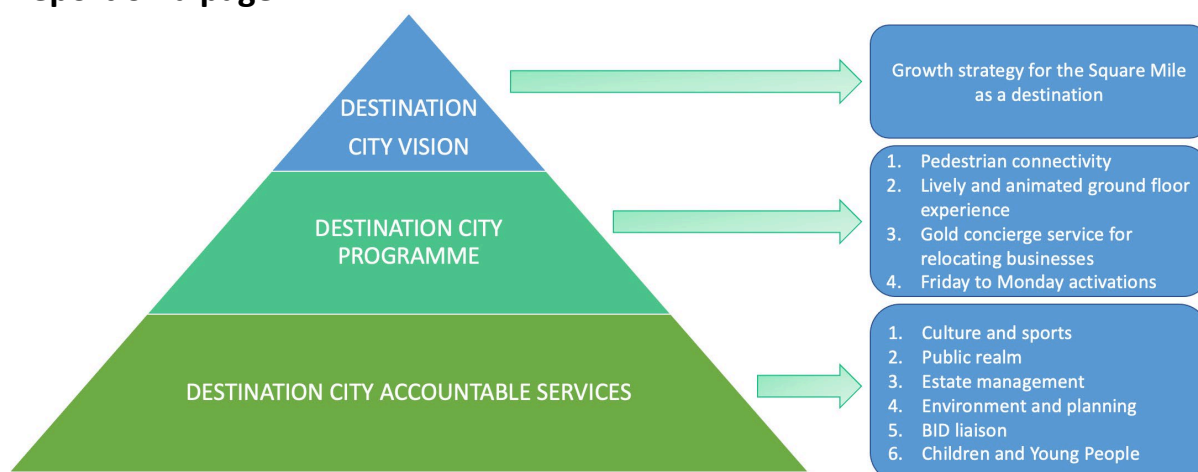


**APPENDIX 2**  
**Destination City – Independent Review 2024**

**Paul Martin**  
**April 2024**

## Report on a page



- Destination City is the growth strategy for the Square Mile as a location. In the decade ahead, the City aims to be not just a global magnet for international talent and finance, but a global magnet as a place.
- Destination City should be a collaborative partnership programme with the Corporation of London providing the strategic direction, steerage and collaborative ethos rather than an autonomously provided set of activities.
- Destination City programme will be an accountable programme of relevant services and partners which can translate the City's mission into practice – priorities will include improving pedestrian connectivity between places, a consistently lively and animated ground floor experience to enable more food markets, sports, outdoor movie screenings, light festivals, fashion events, a premium concierge service for relocating businesses and a particular focus on driving footfall between Fridays and Mondays.
- The Destination City Hub will be different to the current approach. It will not run events directly, but work with the BIDs, City of London Corporation (CoLC) services, businesses and existing partnerships, and cultural organisations that will do so. The Hub will be small, strategic, collaborative - an enabler of the Destination City programme.
- Building on the current City Envoy Network, a new Destination Advisory Board will bring together business and stakeholder interests alongside Members to shape and grow the programme.
- A new Destination City Dashboard of currently available data should be published prior to any further commissioned insights programme.
- The professional leadership of culture will be resolved – and the opportunity for a cultural strategy which can both sit independently from the Destination City programme and simultaneously contribute to it, working with all cultural partners.
- The governance scaffolding will confirm the Policy & Resources Committee as wholly responsible for Destination City while the Culture, Heritage & Libraries Committee will be wholly responsible for a new Cultural Strategy, developed by a newly appointed Head of Profession. Additionally, a stronger input from the private sector (including developers) will be secured in a public/private Destination City partnership board.

## **1. Terms of reference**

- 1.1 I have been commissioned by the City of London Corporation (CoLC) to undertake a review of Destination City with the following terms of reference:
  - 1.1.1 Create a strategy and narrative that sets out the different potential workstreams involved (e.g. strategies, teams, partners) with associated responsibilities, deliverables, KPIs, and interdependencies which contribute to the shared outcome of footfall that creates spend.
  - 1.1.2 Deliver a set of recommendations as to how this desired shared outcome can be best delivered (particularly the vision, strategy and implementation plan, and communication and engagement plan), including any proposed changes and/or new workstreams.
  - 1.1.3 Define a measurement model to monitor and assess performance and report on results (outcomes and outputs) in a clear, cohesive and consistent manner.
- 1.2 Additionally, I have been asked to comment on a recommended approach to the keenly anticipated Culture Strategy.
- 1.3 I have had close regard to Member discussion at both relevant Committees on these terms of reference especially at the Culture, Heritage & Libraries (CHL) Committee at its meeting on 20<sup>th</sup> November 2023 and again at the CHL Committee on 8<sup>th</sup> February 2024; and at the Policy & Resources Committee at its meeting on 14<sup>th</sup> December 2023. Where I have reflected on organisational implications and choices, this is because I have been specifically invited to do so. I am grateful to all Members who have taken up the invitation to meet and for their insights, which at all times I have found to be instructive and well-founded.
- 1.4 Throughout the report, I refer to the city and Square Mile, and have interpreted Destination City as specific to this geographic area. All references in this report to the 'city' refer to the Square Mile. Therefore, although I appreciate that the CoLC has important and varied cultural and open space assets outside this geography, I have seen these as outside the scope of this review except for schools should all be consider as in scope for the outreach to children and young people: the City of London has one maintained primary school and ten sponsored academies as part of the City of London Academies Trust (CoLAT). It also supports three independent schools. In addition to the Family of Schools, there are two schools and one college in the City of London.

## **2. Process undertaken and acknowledgments**

- 2.1 During the course of my review, I have met (often on several occasions) with 169 Members, officers and representatives from City businesses, arts and cultural institutions and others with an expertise in this subject. Within the time available,

every effort has been made to reach all organisations and people with an interest in engaging with this review. These meetings have been a combination of in-person and Teams-based meetings and also digital surveys. In December 2023/January 2024, a review survey was disseminated through the CityResident newsletter, CoLC website, Barbican Bulletin, John Fletcher's Residents WhatsApp Group, Golden Lane & Middlesex St newsletter and CoLC social media. The Citizens' Forum on 15<sup>th</sup> January also discussed the review, and I presented to the Citizens Forum followed by a discussion at the Forum's meeting on 19<sup>th</sup> February 2024. I presented to a business breakfast with interactive voting on 20<sup>th</sup> February 2024. I met with 40 Cripplegate residents at the Golden Lane Estate Residents Association (GLERA) meeting on 28<sup>th</sup> February (including the Chair of Tudor Rose Court) and with 30 Livery Companies on 1<sup>st</sup> March. I met with Portsoken residents on 10<sup>th</sup> March and also with Golden Lane residents at the Golden Social coffee afternoon on the 11<sup>th</sup> of March. This dialogue continued all the way through to the meetings of the two relevant Committees on 18<sup>th</sup> March 2024 in order that the maximum possible number of people can have an input into the future of Destination City. Three informal all-Member engagement sessions took place for feedback on a report preview. I valued these conversations and have provided a response to all Member queries raised at these meetings.

- 2.2 It is impossible not to be impressed by the deep knowledge and commitment that all of the people with whom I met have for the unique place that is the Square Mile. Passion for the Square Mile is not only rooted in an economic insight into the indispensable contribution that the City contributes to the country and the world; but also, for the heritage, culture and joy that the historic City of London brings to residents, workers, new visitors and potential workers in London, the UK and throughout the world. I hope that all those who gave up their time to share their insights with me recognise at least some of what they said to me in this report: I have drawn heavily on their insights.
- 2.3 It is helpful to commence this report by first understanding the genesis and development of the programme – how did we get here? This is important, to accurately understand the programme's inception and original business case, its subsequent evolution and consequently its potential forward trajectory. The tracking of a policy initiative also provides scope for organisational reflection and learning which is at the heart of developing a culture of continuous improvement. My report goes on to define a revised business case and metrics for Destination City, making proposals for the organisational approach that will efficiently deliver on these goals.
- 2.4 I have been very well supported by Damian Nussbaum and his colleagues in Innovation & Growth, and thank them for their extremely efficient organisation and support to this review without which it would not have been possible. My belief is that my recommendations are compatible with the recently adopted Corporate Plan 2024-2029, and similarly that the recommendations do not generate additional and unbudgeted financial implications for the City Corporation with the potential exception of the future arrangements for the Head of Profession (Culture) depending on the preferred option.

### 3. Recommendations

In summary, I present the following recommendations that are explained in the body of the report:

#### **Destination City Core Recommendations – Vision and Mission**

1. Destination City should be redefined as the growth strategy for the Square Mile as a destination (para 7.8).
2. Recast Destination City as a partnership approach to making the Square Mile a magnetic destination, prioritising improving pedestrian connectivity between places, a consistently lively and animated ground floor experience, a premium concierge service for relocating businesses and a particular focus on driving footfall between Fridays and Mondays (para 7.12).

#### **Governance**

3. Align accountability for the refreshed Destination City programme to the Policy & Resources Committee while aligning accountability for the culture strategy to the Culture, Heritage & Libraries Committee (paragraphs 13.1 - 13.2).
4. Create a new Destination City Board to build on, and succeed, the current City Envoy network with terms of reference and membership as set out in Appendix 2.

#### **Delivery**

5. Reshape the central Destination City team to become a Destination City Hub, reflecting the responsibilities and capabilities described (paragraph 8.1).
6. Request the Town Clerk/Chief Executive to consider the future organisational location for the Destination City Hub, including the possibility that it should be relocated to the Town Clerk's department to enable cross-departmental delivery (paragraphs 13.8 - 13.9).
7. Future events programmes to be commissioned by the cultural and heritage organisations in the Square Mile including the City's Barbican Centre, Museum of London and Business Improvement Districts (BIDs), businesses and relevant community interest companies. Events that are supported by the City of London Corporation should support the strategic priorities and goals (e.g. driving Friday/Monday footfall), be regular (for example, monthly) and likely to be smaller scale than those run by Destination City to date (paragraph 8.4).
8. Establish a Destination City Dashboard using the targets and measures in Appendix 1.

9. Commission future insights programme jointly with Business Improvement Districts having ensured that the data materially adds to the Destination City dashboard and focusses on market research on visitor originating area, attitudes and quality of experience (paragraph 8.5).
10. Reevaluate the social media strategy and the possible partnership approaches to this where duplication currently exists, focus effort on a comprehensive calendar of events, and achieving an enhanced sense of the City of London as the capital's 'Old Town' (paragraphs 8.16).
11. Ensure lease conditions in relevant commercial areas reflect a curated and appealing visitor experience (paragraph 10.6).
12. Encourage relevant services working with children and young people to prioritise school visits that align with the Destination City priorities and the development of skills and employment opportunities in the hospitality industry (paragraphs 12.6).

#### **Establish professional leadership and strategy for Culture, Heritage & Libraries**

13. Request the Town Clerk/Chief Executive to consider options for the future Head of Profession for Culture as described and make an appropriate appointment to progress the Cultural Strategy (paragraph 9.8 – 9.13).
14. Align the new Culture Strategy with the Destination City vision in an approach that is collaborative, develops new partnerships and sets its sights on the City of London as an international cultural and heritage destination (paragraph 9.16 - 9.18).

#### **4. Destination City – origins, inception, funding and development**

- 4.1 The Destination City programme was first considered by the Policy & Resources Committee on 21<sup>st</sup> September 2021 and the Culture, Heritage & Libraries Committee on 22<sup>nd</sup> September 2021. This early thinking led to further papers to the Policy & Resources Committee on 16<sup>th</sup> December 2021 and the Culture, Heritage & Libraries Committee on 13<sup>th</sup> December 2021, which in turn was ratified by the Court of Common Council at its meeting on 13<sup>th</sup> January 2022. It is important to establish the context for this originating purpose of Destination City and the propositions that were made and approved.
- 4.2 These papers coincided with the final six months of the COVID-19 pandemic, and the imperative for the City to recover its lost footfall and revenues. The thinking was informed by an originating independent review undertaken by Danny Lopez which focused on the untapped leisure opportunities in the City of London. This originating review "*set in the context of COVID*" noted the need to develop the City's brand identity. The report "*saw the opportunity to develop an exceptional offer, with the cornerstone of an ambitious events programme*". The report was decisively outward-facing and consumer-orientated, "*repositioning the Corporation's Culture Team as an*

*autonomous and dedicated destination resource, responsible for all place marketing. Headed by a full-time Director and reporting through the Executive Director: Innovation & Growth, to the Policy & Resources Committee. This team should develop and execute an ambitious cross-sectoral promotion strategy that is guided by the City Envoy Network. It should be data led and outward facing”.*

- 4.3 The commitment was made to “*electrify the City’s leisure offer*” through significant and targeted interventions. Additional budget provision of £2.3 million per annum for 3 years was approved by the Culture, Heritage & Libraries Committee (31<sup>st</sup> January 2022), Resource Allocation Sub-Committee (3<sup>rd</sup> February 2022) and Policy & Resources Committee (17<sup>th</sup> February 2022), utilising the Return on Investment metrics below. Target Operating Model (TOM) changes located the new Destination City team in Innovation & Growth, and made other changes, notably to the operational arrangements of the Guildhall Art Gallery. Although the operational changes to the Guildhall Art Gallery are outside my remit, it is important for the impact of these to be kept under careful review.
- 4.4 The decisions were informed by an analysis that stated that “*every £1 spent by the CoLC will attract £3 from commercial partners. Collectively, every £1 spent on Destination City would aim to generate £25 for the City’s economy. Really successful campaigns achieve 50 x RoI and higher so we’re being cautious*”. Clear targets were set for the new Destination City programme - to increase visitor numbers by 5% from a peak of 21 million in 2019 to 22 million by 2025; and to increase spend by 7.5% from £2.1 billion in 2019 to £2.25 billion in 2025.
- 4.5 In governance terms, it was agreed by Court of Common Council in January 2022 that the Policy and Resources Committee will have strategic overview of the Destination Strategy, with the Culture, Heritage and Libraries Committee positioned as a key Committee in the implementation of recommendations; and, that counsel, guidance and support be reinforced by a new, influential, industry-led City Envoy Network (comprising cultural and business leaders). Four workstreams had been developed – Insights & Performance; Commercial & Brand Partnerships; Enlivenment & Vibrancy; and Profile & Promotion. Regular reports to the two Committees have been made on progress with each of these workstreams.
- 4.6 An events programme was seen as the main focus of Destination City. At its meetings on 5<sup>th</sup> May 2022 (Policy & Resources Committee) and 16<sup>th</sup> May 2022 (Culture, Heritage & Libraries Committee) this programme was described as a ‘*Hero event programme*’. It comprised three main clusters of events: a Destination City launch event in autumn 2022 (styled the Golden Key); a Spring Festival event in 2023 (which became the Bartholomew Fair festival in September 2023); and a Winter Festival envisaged for November 2023/January 2024, which has not taken place. The other main publicly accessible deliverable has been the development of a new leisure website, [thecityofdndn.com](http://thecityofdndn.com). Governance structures have been established to support Destination City, including externally through the City Envoy Network.

- 4.7 During my initial meetings with the Destination City team leadership they explained their experience that the programme had released high expectations, not all of which could be met by the central Destination team; they saw my review as a means to take a fresh look at how these hopes and expectations might be met.

## **5. Analysis of Destination City origins and inception**

### *A programme with high-level awareness and support*

- 5.1 Destination City has a profile and level of awareness that is unusual for a freshly minted governmental programme. Not only within the City Corporation but externally in the business and resident communities, I have seen a high level not just of awareness, but of support, for Destination City. It is widely seen as a well-judged and timely strategic intervention following the pandemic and the significant changes in working and leisure patterns that have followed. Post-pandemic changes had a particular and unique impact on the City of London which is so heavily reliant on the regularity and rhythms of working life in financial and professional services.

### *Outward-looking and ambitious*

- 5.2 Destination City is a galvanising mission for the City of London as a corporation and in its wider convening role for businesses and cultural organisations, a practical manifestation of the “shared endeavour” urged by Lord Lisvane in his 2020 review. The originating Lopez review was emphatically aspirational, outward-looking and ambitious in its aims to deliver events-based programmes combined with destination marketing that would propel the Square Mile forward as an international visitor destination.

### *Strategy and levers to drive delivery*

- 5.4 What factors drive destination choices? This is a complex question but needs a response that is relevant to the City of London in order to develop a credible strategy and proposals for intervention. From the international research that I have read during the course of this review, it appears that cultural activities, gastronomy, history, infrastructure, connectivity, safety, accommodation and leisure attractions are the main sources of differentiation between European cities. Some of these factors are also highly relevant to decisions relating to inward investment – notably, infrastructure, city dynamism and the attractiveness of the city to young and highly mobile international talent. It is important to emphasise that the city is in a strong position in terms of the hygiene factors that are essential prerequisites to being a credible destination – particularly connectivity, a high-quality hospitality offer and reliable levels of public safety. I want to single out public safety as especially important as it is of course within the CoLC direct control as uniquely amongst local authorities in the UK the city has its own police force. This undoubtedly results in the city’s conspicuously high levels of public safety which must never be taken for granted. If we think of safety in terms of Maslow’s hierarchy of needs it would be the



foundation stone of the city as a destination, without which all other efforts would be doomed. The development of the city's evening economy in particular needs to continuously have a heedful eye to any unwanted impacts for example on levels of anti-social behaviour which needs careful consideration from both the Corporation (for example, licensing and community safety) and City of London Police. It is especially positive to see the new Corporate Plan reference one of its outcomes as being attracting people to a safe, secure destination which is recognised as being a unique selling point for the Square Mile.

5.5 The City Corporation has a number of levers to help achieve these outcomes, but they are not generally within the remit of the current Destination City team. The Lopez review acknowledged the need for a whole organisational approach and the intention is that this review contributes to an improved operational model for Destination City. It is generally accepted that departmentalism alongside Committee based decision-making risks creating silos of people and thinking that means corporate initiatives require significant senior managerial heft to achieve focus and delivery. The successful implementation of the Climate Action Strategy shows that the CoLC can effectively manage a corporate programme given the right approach.

5.6 Many interviewees were more complimentary about strategic intent than operational delivery, and their critique was invariably focused on the priority given to events. The sometimes-ambiguous future of legacy initiatives (referred to in paragraph 5.3 above) has resulted in uncertainty about interventions, especially in the space of cultural services. It follows that while it is sometimes said that there is confusion about the vision for Destination City, in practice the issue may be less about vision (for a world class business and leisure city) than the chosen interventions that are the instrument of this vision; and uncertainty about strategic direction, resource allocation decisions and the coherence of the programme's governance.

*Developing a more strategic, networked, outward-facing and galvanising team*

5.7 In order to meet fully its potential, Destination City needs to work effectively within a wider eco system of businesses, Corporation of London services, Business Improvement Districts and cultural organisations. Although each of these organisations can achieve much working alone, working within a wider framework of cooperation and delivery and orchestrated by the CoLC would have a much greater impact. A more structured approach to strategic leadership in this complex eco system could achieve better value for money and outcomes. The original Return on Investment targets were mechanically related to the organisation of events and, in the light of experience, too challenging to achieve.

5.8 It follows that the strategy for Destination City, its future operating model, governance and metrics are at the heart of my review.

## 6. The City of London in the post-pandemic era

### *Working patterns and behaviour change*

- 6.1 COVID-19 related restrictions were lifted in February 2022, by which time cities were beginning to understand the scale of the longer-term challenges posed by the economic impacts of the pandemic especially in terms of economic growth and productivity including tourism, visitor numbers and business viability. Destination City represented the City Corporation's flagship initiative to address urgently this challenge. In the two years following, the enduring impact of behavioural changes can be seen more starkly in relation to patterns of worker attendance in offices than in tourism and visitor numbers. Behavioural and attitudinal shifts first observed during the pandemic are now grounded in what appears to be a permanent and widespread worker preference for at least a measure of homeworking in place of the conventional 5-day attendance at the workplace.
- 6.2 This behavioural change has had a greater impact on the City of London than most other cities. Its concomitant was increased levels of employee pressure for high quality work spaces that aid collaboration and teamwork, coupled with connectivity and high-quality local working environments – for example, places to eat, socialise, engage in sport and recreation. In sum, in the past two years businesses have been engaged in a “race for quality” and the pressure on corporate organisations is to “earn the commute”.

### *The City's resilience*

- 6.3 In spite of the changes, great cities have a history of adapting and bouncing back from adversity and London's strength and resilience in the post-pandemic era remains exceptionally strong. The 2023 Global Power City Index (MORI Memorial Foundation) found that London remains 1<sup>st</sup> “based on its overwhelming strengths. London has no major weaknesses and is particularly strong in cultural interaction where it has ranked 1<sup>st</sup> for the past 4 years including in indicators such as tourist attractions and nightlife options”. This survey does not extrapolate the City of London from London as a whole, but it is certain that many factors (“London is ranked first in both foreign exchange turnover and interest rate derivatives turnover, and scored second in access to highly skilled personnel”) relate specifically to the City of London's unique strengths.
- 6.4 Some indicators suggest that the City is indeed adapting and thriving. In recent months, the Office of Road and Rail published figures showing that Liverpool Street station has risen from 4<sup>th</sup> to 1<sup>st</sup> place as the country's busiest railway station, overtaking Waterloo station. The same survey shows that Farringdon station has risen 29 places in 1 year to become the country's 9<sup>th</sup> busiest station. The Corporation contributed £200 million to the construction of the Elizabeth line and assisted in delivering an arts programme in eight of the central London stations, underpinning the city's long-term commitment to connectivity and visitor appeal.

### *Demand for quality*

- 6.5 Since the pandemic, consumer trends are towards spending time in high quality neighbourhoods with tourism, shops, leisure and connectivity that generate mix and variety. This trend, already recognised in the city pre-pandemic, is now even more apparent both for leisure visits and business development, expansion and relocation. The quality of an urban neighbourhood is increasingly seen as a driver for business location and inward investment, and it follows that Destination City should be seen as a business as well as visitor-orientated programme. The hoteliers with whom I met describe a significant growth from hybrid business/leisure visitors (“bleisure”) underpinning the crucial link between visits for a business purpose and a leisure purpose. This is underlined by recent market research specifically on the City of London which found that “more local events and more green spaces” are the key priority for visitors to the City and equally those who might considering visiting the city. Importantly, there is a high level of congruity between what visitors, workers and residents look for in the city – their interests are not competing or mutually exclusive, but highly compatible.

### *Visitors and consumer spend*

- 6.6 Visit Britain data shows that the ratio of visits to the City of London for leisure and business purposes divides 50/50 – an exceptionally unusual pattern. The City of London has (after Birmingham) the highest consumer spend on business visits of all local authorities in England, as well as internationally significant visitor attractions. In no sense can the City be seen as a typical destination – no other area has a comparable blend of premier visitor attractions, international business activities and historic character. It follows that while it is possible to learn from other areas, the approach to Destination City must be specific and bespoke to the City.
- 6.7 Turning to progress over the past two years, it is notable that consumer spend has achieved and exceeded 2019 levels in the City. On the other hand, the number of visitors is (according to the CoLC commissioned Colliers baseline report earlier in 2023) 34% of its 2019 level. This figure is significantly lower than TfL and CoLC data (e.g. street scene data) which suggest a higher level of current footfall. All available data shows footfall on Mondays and Fridays as significantly lower than Tuesday to Thursday, with weekend footfall now slightly higher than 2019. Major retail landlords report double digit footfall growth in the city relative to 2019. Undoubtedly, reductions on Mondays and Fridays are largely attributable to changes in worker attendance at the office and aggravated by the continuing transport disruption due to industrial action. Hotel occupancy has not yet recovered to its 2019 level; it is forecast to do so in 2025. According to Mastercard data, the City of London’s share of total London spending in restaurants remains down on its 2019 level. More generally, while the City is performing well relative to Canary Wharf, the comparison is less favourable with, for example, the West End and parts of outer London.
- 6.8 In summary, the impact of the pandemic – as in other highly disruptive periods like the two wars – has been to accelerate trends that were already underway but

significantly accelerated under the stress of convulsive change. This change points towards the need for lively, attractive and buzzy public spaces, 7 days a week. For the City of London Corporation, this is the opportunity to use its leadership and influence to shape the Square Mile as a magnetic 7-day a week destination that is not merely functional for commercial purposes but radiates liveability, vitality and the sense of place that can only be felt in such a historic and culturally rich area.

## **7. A proposed narrative and business case for Destination City**

### *A business case that responds to changes since DC inception*

- 7.1 Just as the context for Destination City has changed since its (post-pandemic recovery) origins, so the business case for Destination City must be reconsidered and modified. First, Members need to be convinced that there is a need for a Destination City programme. If decision-makers conclude that the rationale for Destination City was grounded in a policy context that is no longer relevant, and there is no compelling alternative business case, then it might be logical to stand the programme down at the end of its planned 3-year term. The argument to support such a conclusion would be that the original business case is no longer needed as lower visitor numbers has not undermined spend which now exceeds 2019 levels.
- 7.2 However, I do not believe that this is a conclusion that would attract significant support. The distributional change in patterns of footfall and spend alone merit a strategic response. But beyond this, the scale of CoLC ambition for economic growth and its consequent investment in major projects and an extraordinary construction pipeline in the Square Mile generates urgency for a destination strategy. The expectations of people – especially people in their 20s who represent such an important part of the city’s workforce – have substantially changed. Demand for healthier lifestyles, shared social space that is not dependent on alcohol consumption, visually attractive, buzzy areas – these trends have been developing and accelerating in recent years. Changing expectations are true not only of City workers and potential workers, but of domestic and international visitors, and of residents as well. The Square Mile must have a response to these seismic changes, and it cannot just be about the structures of buildings but also of the communities and neighbourhoods in which they are located. There is no appetite from any of the opinion shapers that I have met for complacency, retrenchment or stepping back from the ambition for the City to be a world class business, cultural and leisure destination: in fact, quite the reverse.
- 7.3 The reason that the launch of Destination City ignited such a positive response was not limited to ‘catching a moment’ as the pandemic’s grip on the City was released. It was also because intuitively we all understand that things have changed. The acceleration of changes in public behaviours being the most marked signpost of this change, for all to see. Workers – as well as residents and international visitors - seek more authenticity, vibrancy, socialisation and quality in the places where they spend their time. Joy is now a driver for economic success. They also place a high premium on places that are well connected. This trajectory aligns well with the attractions and

excellent public transport links of the historic City of London. But the current offer is undermined by market reluctance during weekends when commercial premises are substantially closed, there's uneven quality of public realm, sometimes difficult or obscure walking connectivity between sites, a lack of data on visitor perceptions and a brand/profile that is strong in specific locations but weaker across the Square Mile as a whole.

- 7.4 Hence, Destination City has continuing validity and salience – within a changed context. The refreshed business case for Destination City recognises the common features of business, visitor and resident demand for capitalising on the unique historic, cultural, characterful and commercial appeal of the city. This business case is grounded in a systems approach which defined in a broad and ambitious programme to draw in relevant place- based services to drive high quality destination appeal. Hence, the Destination City programme is at the heart of the proposed new approach.
- 7.5 In order to achieve a defined and manageable Destination City programme, it's important to be clear what could be inside the programme and what falls outside. As a broad ambition, many CoLC services and those provided by partners fuel the ambition of Destination City. However, the programme itself needs to focus on the immediate priorities which are generated by available data and the interviews undertaken during this review. I have heard concerns that Destination City risks being all things to all people, that it needs parameters of what is in/out of scope. However, it is also the case that Destination City has unleashed ambitions across the City Corporation – not just in obvious strategic plans like the new City Plan 2040 but in other service areas too. For example, I heard how Destination City was a stimulus for new proposals in the recently adopted sports strategy which has accelerated the intention for sports and activity to be a galvanising attraction within the Square Mile. The example is instructive – although sports and outdoor activity is not an obvious lever for Destination City, given the changing pattern of demands it is highly relevant – last summer's record breaking Padel Tennis festival being a case in point. In the business community, I have found dynamic entrepreneurs keen to attach their growth plans to the wider Destination City ambition. This is a real achievement, and in the sheer quantity of follow-up correspondence to my meetings I continuously see a spontaneous energy about the direction the CoLC has set.

#### *Definition of terms*

- 7.6 I have been asked to recommend a refreshed narrative and framework for Destination City.
- 7.7. It might be helpful to first define my terms.

*Destination City Hub* is an officer group – it is the central team that enables and supports the Destination City programme. Destination City Hub's core functions are strategic (advising on the evolving strategy to achieve footfall, spend and enhanced reputation), preparing and coordinating the Destination City programme, measuring

its progress and supporting its collaborative governance. The Destination City Hub therefore becomes an orchestrator, an enabler – not a direct events organiser as it is currently.

The *Destination City programme* is an agreed, costed and funded plan of action that enables the Corporation’s goals to drive economic growth and be achieved through its relevant services. The term “programme” is used to describe the coordinated management of projects (rather than an events programme). This is consistent with the recently adopted CoLC project governance vision. The scope of the programme can evolve and vary over a period of time. The services identified as potentially relevant to Destination City are ones where relevant colleagues have themselves identified their potential contribution. The inclusion of services does not necessarily mean that they will feature in the initial programme – this is a decision-making point beyond this review.

*Destination City outcomes* are the focused on the metrics, “more visits, more spend, more advocacy”. The significance of advocacy is partly that research shows this drives spend; and also, that it is essential for decision makers to walk in the shoes of visitors and understand their experiences to shape the forward programme.

#### *Destination City – elevator pitch*

- 7.8 Destination City is the growth strategy for the Square Mile as a location. In the decade ahead, the City aims to be not just a global magnet for international talent and finance, but a global magnet as a place. We will prioritise ground floor activation, the shared spaces between buildings, a premium “can do” service for relocating businesses and the lively buzz of the City. Visitors and workers are welcome 7 days a week. We’ll put extra effort into making Friday to Monday the perfect time to visit. We will know we have got this right when every year we welcome more top talent and more visitors, who spend more, and tell others that they must come too.

#### **Recommendation 1: Destination City should be redefined as the growth strategy for the Square Mile as a destination**

*So, what’s in – and what’s out – of the Destination City programme?*

- 7.9 If the proposals in this review are taken forward, the next step will be to agree a Destination City programme. This programme will comprise those ideas and initiatives contained in this report that Members support. The programme should be a rolling 3-year plan, commencing as soon as the operationalising of the changes proposed here are in place - in 2024/25. The new programme will drive growth in the Square Mile especially focusing on the vibrancy and diversity of the ground floor experience, activities that promote open and green spaces, walking connectivity and increasing footfall/spend between Fridays and Mondays and a premium business relocation service. They will also identify necessary resource implications for new or currently unfunded initiatives which are described in this report. The Destination City Board (or, prior to its formation, the existing City Envoy Network supplemented with

new representation) should support with the implementation of the Destination City programme in accordance with the strategic direction provided by the Policy & Resources Committee. The resource envelope for this programme will be the moved from the current available budget and any approved carry forward underspend from 2023/24. Initiatives that do not readily align to the identified priorities will in the immediate term be outside the Destination City programme but will continue to contribute to the wider goals set out in the ambition. No assumptions have been made about availability of funding from 2025/26 onwards, and so Destination City will be dependent on either/both future growth bids and income from the sponsorship and branding workstream.

7.10 *If this review is accepted, what has changed – in a nutshell?*

- The Destination City programme will be an accountable programme of relevant services and partners which can translate the City’s mission into practice – especially focused on vibrancy and diversity of the ground floor experience, activities that promote a consistently lively and animated ground floor experience, walking connectivity and increasing footfall/spend between Fridays and Mondays and a premium business relocation service.
- The Destination City Hub will be different. It will not run events directly, but work with the BIDs, CoLC services and cultural organisations that may do so. The Hub will be small, strategic, collaborative - an enabler of the Destination City programme.
- Building on the current City Envoy Network, a new Destination City Board will bring together business and stakeholder interests alongside Members to shape and grow the programme.
- The Destination City Dashboard will include regular market research so decision makers understand what visitors experience and how they feel, as well as their numbers and what they spend.
- The professional leadership of culture will be resolved – and the opportunity for a cultural strategy which can both sit independently from the Destination City programme and simultaneously contribute to it, working with all cultural partners.
- The governance scaffolding will confirm the Policy & Resources Committee as wholly responsible for Destination City while the Culture, Heritage & Libraries Committee will be wholly responsible for the cultural strategy. Additionally, a stronger input from the private sector (including developers) will be secured in a public/private Destination City partnership board.

## *Nine Elms Strategy Board*

There are examples nationally and internationally of public/private partnership boards overseeing a place-making strategy. No case study will provide an exact replica of the opportunity in the Square Mile, but by way of illustration and from my own experience, Nine Elms provides an insight into one approach.

### **Nine Elms – case study**

The regeneration of Nine Elms (including Battersea Power Station) was overseen by a Strategy Board which met from 2010. The Board comprised senior elected representatives from the relevant authorities with representation from developers. The Board was supported by a small officer team based in the local authority, which managed the Board's agenda, work programme, budget management, marketing and cultural strategy. The Board focused particularly on community engagement, connectivity and the shared public spaces between developments. The curation of a new Linear Park which stretches from Vauxhall in the east to Battersea Power Station in the west was a particular focus for the Nine Elms Strategy Board – pooling development contributions and overseeing an approach to landscape standards and maintenance. Democratic accountability was secured through regular reports to Wandsworth Council's central policy-making Committee and, occasionally, referrals to full Council on matters of particular interest or contention.

### *An ambitious and transformational partnership approach*

7.11 The overwhelming weight of feedback I have received leads me towards a partnership approach to Destination City which is ambitious and transformational, aiming to secure the position of the Square Mile as a world class destination – between its world class sites as well as within these sites.

**Recommendation 2: Recast Destination City as a partnership approach to making the Square Mile a magnetic destination, prioritising improving pedestrian connectivity between places, a consistently lively and animated ground floor experience, a premium concierge service for relocating businesses and a particular focus on driving footfall between Fridays and Mondays**

7.12 What follows is an exploration of the key features of a proposed new model – including the Destination Hub and potential service contributions to the new Destination City programme, its governance and decision making.

## **8. Destination City Hub**

### *Strategy*

8.1 A proposed Destination City Hub would provide the necessary strategic inputs to ensure the programme as a whole is effective – pursuing the identified priorities that



are most likely to increase visitor numbers, spend and advocacy. This will be a small, agile and collaborative team. The purpose of the Destination City Hub is to provide a professional core to support the overall programme. Strategic direction, programme management and governance are crucial. As outlined earlier in this report, the originating organisational focus for the Destination City team – and a substantial use of the additional new resources – has involved the organisation of events. Event organisation expertise is available in many other parts of the Corporation and its partners. The longevity of the Lord Mayor’s Show, dating back to the 13<sup>th</sup> century, is of course without parallel. Expertise in event organisation is also available in other parts of the City Corporation – notably, the Barbican Centre – and in partner organisations like the London Museum and BIDs. The purpose of the Destination City Hub and programme is to add value, through determining additional activity and services that deliver agreed targets.

**Recommendation 5<sup>(1)</sup>: Reshape the central Destination City team to become a Destination City Hub, reflecting the responsibilities and capabilities described.**

- 8.2 Events were discussed in many of my conversations during this review, because Destination City had become inextricably associated with an events programme. I have been provided with some of the background to smaller scale annual events programmes which the Corporation has run over very many years – such as the City of London Festival and the Outdoor Arts Festival. My understanding is that the Outdoor Arts Festival went into abeyance at the outset of the pandemic in 2020, and that it was supplanted by the organisation of the Golden Key in 2022 and Bartholomew Fair in 2023. Detailed evaluation of the Bartholomew Fair festival has been undertaken by both the Policy & Resources Committee and the Culture, Heritage & Libraries Committee. The festival succeeded in attracting widespread media coverage, and certainly made an impact on the Square Mile – especially with businesses, who appreciated the extraordinary effort and investment that the City Corporation was making to bring this part of London to the attention of new audiences. Events were also greatly appreciated by those audiences who attended them. However, visitors proved harder to attract than expected and the programme did not meet the expected Return on Investment.
- 8.3 Destination City might better think of itself as an amplifier and orchestrator of events, rather than the direct organiser. This would assist Destination City to become more strategic about its goals and enable the numerous institutions with expertise and capability in events – like the Guildhall School of Music & Drama, the Barbican Centre, the London Museum, St Paul’s Cathedral and many others – to utilise their capacity in new and varied settings. Consideration should also be given to encouraging the Business Improvement Districts to undertake events in their areas. An important criterion for funding events should be the extent to which they are held at times that would maximise the hospitality industry’s ability to support events and raise revenue from them. During my research, I have seen excellent examples of events organised this way. One example is the Smithfield 150 programme in August

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<sup>1</sup> Note: recommendations are not ordered sequentially. All 14 recommendations are covered in this section.

2018, led by the (then) Museum of London alongside the Smithfield's Tenants Association and Culture Mile partners. Over two days, 25,000 people attended over 300 performances. The Charterhouse enjoyed its 2<sup>nd</sup> busiest day ever while St Bart's the Great church recorded over 5,000 visitors (usually 200 in a week). Such events – organised by accomplished existing organisations which are supported through an overarching strategic partnership – represent the most sustainable, effective and successful means of holding remarkable events.

- 8.4 Therefore, I recommend that from 2024, events should be led by the City's cultural and heritage organisations, or by other partners which may include the Liveries, Business Improvement Districts etc. This could well include running future events styled as St Bartholomew's Fair which build on the established brand and heritage of the Fair. Success criteria should correlate to a proposed Destination City dashboard.

**Recommendation 7: Future events programmes be commissioned by the city's cultural and heritage organisations including the City's Barbican Centre, London Museum, Business Improvement Districts and relevant community interest companies. Events that are supported by the City of London Corporation should support the strategic priorities and goals (e.g. driving Friday/Monday footfall), be regular (for example, monthly) and likely to be smaller scale than those run by Destination City to date.**

#### Data/insights programme

- 8.5 The original proposals for Destination City also placed a strong emphasis on data and tracking the recovery in spend and visitor numbers. Progress to date has included the commissioning of external city data consultants, City Square Consulting, to provide assistance analysing how the CoLC can be an international leader in city analytics and insight. Additionally, Destination City has commissioned and received a baseline report which has been received from Colliers, a global leader in this field.
- 8.6 City Squared Consulting recommended the baseline report which has been received and referred to above and beyond this "one business intelligence platform that is independent, robust and consistent". Further, it recommends an in-house Business Intelligence and Performance Manager.
- 8.7 I agree with City Squared Consulting that the CoLC needs a stronger, inhouse capability to manage performance data which is a core competency for the organisation and the Destination City Hub. Throughout my review I came across valuable and insightful data that had been commissioned by one department or another, is relevant to Destination City, and yet apparently not synthesized and triangulated with other data to develop a rich and comprehensive picture. The Destination City Hub should assemble and publish a dashboard of available data inhouse prior to commissioning any new programme. The CoLC already has access to a wide range of data – directly through its own departments, through the baseline report and also through a combination of publicly available data (e.g. Visit Britain data); data which is available to the City Corporation (e.g. from Central London Alliance and JC Decaux); and data to which it already subscribes (e.g. the excellent

GLA dashboard). I have also spoken to many people outside the CoLC who hold reliable data (like occupancy rates for hotels) which can be accessed by the CoLC. The CoLC needs a centralised data hub that all departments can contribute to, and access. An Intelligence Dashboard would assemble this data in a coherent form, and this inhouse approach would inform the commissioning of a supplementary insight programme. Importantly, data needs to be converted into insight which in turn informs action.

**Recommendation 8: Establish a Destination City Dashboard using the targets and measures in Appendix 1**

- 8.8 A partnership approach to data which enables collaborative sharing of information between the BIDs, the city's cultural institutions and the CoLC is the way forward – where each organisation shares its data to provide a rich and comprehensive picture.
- 8.9 The potential benefit of a tendered insight programme to the Corporation of London is to add further detail to available data. If it is commissioned as currently envisaged, the cost would not be inconsiderable and sensibly dialogue has been taking place with the BIDs to agree a partnership approach. The BIDs will be significant beneficiaries of the approach taken in the Colliers baseline report because of its highly hyper local approach, utilising the BID areas for the purpose of detailed analysis. The starting point is – on what targets does the Corporation wish to track progress? At the highest level, this will be footfall and spend – but also conversion rates (of visitors to spend) and attitudinal research relating to advocacy, if my recommendation on this is accepted by Members. Appendix 1 identifies data requirements that I believe are relevant to the Destination City programme and illuminate current patterns of economic activity. It is important to note that some of these measures are influenced so profoundly by external factors that it would not be reasonable to precisely correlate activity in the Destination City programme to trends revealed by this data. Nevertheless, this dashboard would provide a strategic overview of progress. Additional measurements at a more operational level which are amenable to measuring programme performance will be necessary as the detailed workplan takes shape.
- 8.10 A commissioned insights programme should add currently unavailable data that is relevant to these measures. In particular, a more comprehensive approach to sentiment - market research is needed to understand in much greater detail what workers, residents, business and leisure visitors think about their experience of the City of London and to develop a deeper understanding of strengths and areas for development. The baseline report goes some way towards providing insight on consumer attitudes, but the scope of market research is limited, and this is revealed in some of the findings, for example the surprising finding that the US does not feature in the top 10 visitor originating countries. A different visitor survey was coincidentally commissioned by the Environment Department and undertaken last summer at approximately the same time as the Colliers baseline report. This survey finds North America is the top visitor originating country. It is difficult not to conclude

that the Corporation of London needs to prioritise the collection, sharing and analysis of data it already holds before commissioning future insights programmes.

**Recommendation 9: Commission future insights programme jointly with Business Improvement Districts having ensured that the data materially adds to the Destination City dashboard and focuses on market research on visitor originating area, attitudes and quality of experience.**

- 8.11 During my work, online engagement with city workers, residents and Members was undertaken which attracted a limited response rate (299 responses). I also had the opportunity to meet personally with a number of resident representatives – individually and in groups.
- 8.12 It would be wrong to draw sweeping conclusions from a small survey, but some general observations can be drawn out. The responses received from a small but significant number of residents were more negative than from city workers – notably, about optimism for the future. Most of the responses expressing pessimism were from residents, especially those who had been in the City longer. I believe the expressions of concern may be driven by perceived or actual reductions in service quality from the City Corporation, especially as a landlord, or perceptions that the City Corporation has not always listened to residents, especially around the pace and scale of new developments. The proposal for a ‘residential reset’ should address these concerns which while they were a reoccurring point of discussion are not the focal point of my review. The CoLC published a Resident & Worker survey in December 2022 which has positive findings overall but also raises some potential areas of concern. The previous survey was in 2013 (much too long a gap) and in the intervening period there was a 29-point drop in perceptions that the Corporation provides value for money. Moreover, satisfaction levels had dropped from 87% in 2013 to 69%. One of the underlying drivers of these changes may be the perception that the Corporation needs to listen more to the views of residents, a sentiment shared by 91% of residents. In the context of this report, I also note that the survey found lower scores in ‘fun’ than all other areas. The organisation should put increased focus on addressing its community engagement challenges among both residents and workers and should consider methods of regularly tracking perceptions among its resident and worker community.
- 8.13 The online survey suggests that most respondents have some awareness of Destination City, reinforcing the fact that the initiative has achieved widespread attention. Most thought its purpose was entirely right with only 10% of respondents feel that Destination City’s priority was wrong. Opinion is evenly divided over whether the Square Mile is becoming more buzzy and improving or deteriorating. The Destination City website is yet to achieve a widespread awareness, with many respondents being unaware of its existence. A regular and statistically reliable survey will enable opinion to be tracked over a period of time and provide the necessary insight to drive continuous improvement. The approach proposed for Destination City in this review focuses on benefits which would be experienced by residents, city workers and visitors and indeed a central tenet of authentic destinations is to focus

on interventions that will benefit the locals, and this will inevitably attract visitors as well.

### *Marketing*

- 8.14 The Communications & External Affairs department is the central point of CoLC expertise in this area, but of course an approach to marketing is an important feature of the goals of Destination City. The dominant trend of national and international tourism is so-called ‘set jetting’ – visitors attracted to places that have been used for TV and movie filming. The CoLC has not utilised its immense asset in being the location for countless TV shows and films, from James Bond to Mission Impossible to Harry Potter and (at the time of writing) Slow Horses. Certainly, walking tours can be organised by motivated visitors, but a more dynamic approach to marketing the Square Mile would promote self-organised tours through the destination website ([www.thecityofldn.com](http://www.thecityofldn.com)). The Destination City team has a very limited budget for marketing, and initial work has prioritised a new logo and website which were launched in 2023. Some years ago, at the instigation of the CoLC, the NLA launched a comparable One City website and social media channels ([www.onecity.london](http://www.onecity.london)). CoLC provides funding support to the overall OneCityLDN project (alongside the BIDs, some major developers/investors and larger hospitality businesses). However, the project outputs (including the website) are not directly commissioned by CoLC. In the interests of value for money but also in the consumer interest, the option of building on the undoubted good practice in both websites and social media channels should now be considered. It is encouraging to see the new Destination City website becoming better established with improving content and links with the Corporation’s website and the websites of individual cultural institutions but the challenge of maintaining comprehensive content coverage of the many events and activities in the city means that the Destination City website could not yet be described as comprehensive. The two platforms currently have differing strengths, evidenced by the number of Instagram followers (One City has 128,000 compared to Destination City at 18,300) and website visits (One City has 16,000 per month compared to Destination City at 26,000) which probably reflects differing demographics (One City attracting younger people, more likely to be Londoners, Destination City more likely to be international).
- 8.15 Nevertheless, the two platforms essentially aim to meet comparable and compatible needs, and it makes little sense for the CoLC to support two platforms essentially competing with each other. (I put to one side the CoLC official website as essentially fulfilling a different function, equivalent to a conventional local authority website). Some interviewees commented that they would like to see the Destination City website having a stronger ‘feel’ for the City of London, for example by providing links to walking tours, blogs, newsletters and content that is developed by people who know the city well. A convergence between the two platforms could be beneficial in terms of both impact and value for money, building on the best features of both approaches. Under any circumstances, interviewees would welcome both a more comprehensive approach and a warm, characterful representation of the square mile’s fabric, hidden attractions, atmosphere and conviviality. The Department of

Corporate Communications and External Affairs would be best place to help provide guidance on the most appropriate way forward to achieve the convergence which I recommend.

**Recommendation 10: Reevaluate the social media strategy and the possible partnership approaches to this where duplication currently exists, focus effort on a comprehensive calendar of events, and achieving an enhanced sense of the City of London as the capital's 'Old Town'**

- 8.16 The 'brand' of Destination City was raised by some interviewees. Broadly, the feedback was that Destination City is associated with an external/global approach to promotion and marketing, and the concern is to see an approach that reflects the City's ancient heritage. In many international destinations, visitors head for the 'Old Town' which is seen as a city's historic heart, the most characterful and authentic quarter of a modern city. Going forward, thought will need to be given as to whether to adopt a distinctive brand identity – or perhaps identities, reflecting the differing flavours and characters of the City. The Destination City website tagline is "a place of ideas and imagination for 2,000 years". Any credible brand for the Square Mile or its constituent neighbourhoods is likely to promote the area's unique history and heritage. This is certainly what interviewees want, and there is a pervading sense (probably drawn from the events programme) that insufficient attention has been paid to existing cultural and heritage infrastructure. The reopening of the London Museum will inevitably provide a huge boost to the international association of the City of London with London's history.
- 8.17 More generally, Destination City would benefit from more visible marketing. This need not be prohibitively expensive. For example, Members who wish to promote local attractions and events to businesses and residents would like to use material from Destination City to improve communication. Similarly, the 'City belonging' project (delivered from Communications & External Affairs) has an excellent synergy with Destination City, especially in its insights about City workers and the organisation of events to engage them. A practical change worth exploring is combining the landing page for the free City Wi-Fi to the Destination City/One City homepage with a prominent link to a 'What's On' calendar.
- 8.18 The heavy lifting of promoting the city as a whole is undertaken by London & Partners as the capital's tourism agency, and it is wholly sensible to work closely with them and coordinate marketing campaigns. It would be helpful to develop clearer target audiences for marketing based on insights gained through data analysis. In particular, a key gap in the currently available data is reliable information on where visitors to the Square Mile are coming from – internationally and domestically. I would expect a greater emphasis on marketing over the next year, especially in relation to target audiences. Currently, the best apparent approach is to follow the lead of London & Partners, which is focusing on domestic visitors and visitors from France but there may be reasons to proactively attract others, in particular the vital USA market.

- 8.19 The potential for the space currently shared by the London Centre (managed by the NLA) and the Guildhall Library (managed by the LMA) is considerable. The recently developed London Centre is already an impressive space, and the NLA has the ambition and reach to develop this space still further as a centre for London's built environment. The London Centre is already developing as a centre of excellence for showcasing the City and the NLA is committed to the expansion of its programme of workshops, tours, school visits and outreach activities. The Director of the LMA has commissioned a review of the current Guildhall Library. Potentially, the opportunity for this being a shop window for everyone interested in London's past, present and future is powerful. In a short period of time, the London Centre has provided proof of concept for a partnership model of working in which the CoLC works in close collaboration with a third party to achieve mutual goals.

#### *Commercial branding/sponsorship*

- 8.20 Commercial sponsorship is currently a focus for the Destination City team. A further expert commission has worked on the options for commercial sponsorship and is at a point where market testing could take place to assess what is anticipated to be strong market interest. In seeking brand partnerships. Members are clear that the Corporation needs to operate in a more commercial way, and seek commercial partners for future programming, enlivenment, wayfinding and welcome. There is every reason to believe that there is significant commercial appetite for working with Destination City, and the benefit could be in one of three forms – income; budget relief for existing commitments; and value in kind. Commercial sponsorship will be attracted to a specific product – for example, a public space, a venue, or events and activities. Although the opportunity for commercial income is highly attractive, the devil may yet be in the detail – the acceptability of brand partnership is likely to be highly dependent on the context and brand. The CoLC is rightly cautious not to devalue its distinctiveness through brash or inappropriate sponsorship. The commercial team in the City Chamberlain's department leads on this work on behalf of the Corporation as a whole and is already working towards potential brand partners for the Lord Mayor's Show. The commercial team supports Destination City in its pursuit of brand partners and will work closely with them to achieve the right outcome. Given that resources are constrained, it must be right to continue the workstream on commercial branding and sponsorship to achieve a buoyant income which will secure value-for-money and support Destination City's future vibrancy.

#### *Governance*

- 8.21 The Destination City Hub must lead on governance of the overall programme and proposed governance arrangements are set out below. If my recommendations are adopted, the skills mix needed in the Destination City hub – strategic capability alongside programme management, marketing and governance capacity – will require a reassessment of the team structure and roles. My recommendations would release significant budget for other purposes – in particular, finance that has hitherto been spent on organising events would now be released for other destination purposes.

- 8.22 The available budget would be utilised for spending priorities relating to the agreed Destination City programme. If the recommendations of this report are approved, the detailed workplan for the Destination City programme going forward will be developed in collaboration with the professionals and leaders in these relevant workstreams. Decisions on resource allocation should be taken through dialogue, mindful of the emerging evidence base alongside the need to demonstrate value for money. Although it is premature to be prescriptive about what form these actions should take, what follows could comprise the features of the initial priorities in each of these workstreams.
- 8.23 The Destination City programme is comprised of elements of various services, while the majority of these services sit outside the programme itself. For example, elements of culture overlap with the Destination City programme to drive growth, but culture is much wider in its intent and purpose than economic growth alone. Similarly, the proposed premium concierge service contributes to inward investment, but the City Corporation's inward investment teams are much broader than the Destination City programme. It is also important to acknowledge that a vast number of individuals and organisations contribute to the Destination City ambition without featuring in the programme – including in the hospitality industry, hotels, Livery companies, arts and cultural organisations, churches and many others. The purpose of Destination City is to add value to all this activity.

## **9. Culture & Sport**

- 9.1 As we have seen in the opening paragraphs of this report, the early development of Destination City has been intertwined with culture. This is entirely understandable, and culture has a significant role to play in the future of Destination City. The two overlap but are not synonymous. My terms of reference ask me to delineate between the two strategies.
- 9.2 The City of London Corporation is the 4<sup>th</sup> biggest public sector sponsor of culture in the country. This reflects the Square Mile's unique depth and range of cultural and heritage attractions. Many visitors to the Square Mile are drawn to its iconic attractions - the Museum of London, the Barbican Centre, the Guildhall School of Music & Drama, St Paul's Cathedral, Tower Bridge and the City's ancient places of worship. The Square Mile's global appeal owes much to its immeasurable cultural and heritage offer, which sets it apart from all competitor global financial districts such as Wall Street or Singapore.
- 9.3 The Corporation's continued sponsorship of culture - seen through its significant investments in the Barbican, Museum of London and elsewhere – is more than commendable. It is exemplary.



- 9.4 To what end are these investments made? Principally, it is so these priceless cultural assets can be used and enjoyed by as many people as possible – Londoners, the wider British public and international visitors throughout the world. In doing so, the Corporation burnishes its reputation as a force for civilisation and the public good on a daily basis.
- 9.5 It follows that the cultural attractions of the City of London are a principal driver of the Destination City programme. Individual attractions need to be set within a wider context of an area that values, appreciates and cherishes its heritage and culture. Without a cultural dimension, placemaking lacks authenticity and becomes sterile, anonymous and ultimately disengaging. In my view, cultural strategy is fundamentally about placemaking – a perspective that is widely shared by residents, businesses and Members more generally but does not currently find consistent articulation within the officer organisation.
- 9.6 The transformation of Smithfield market, relocation of the Museum of London, investment in the Barbican Museum, relocation of the Migration Museum amongst other initiatives means that the cultural provision in the Square Mile continues to grow and develop at a dizzying pace. If any local authority area needs a culture strategy, it is surely the City of London. The Culture, Heritage & Libraries Committee is frustrated at recent lack of progress in developing a new strategy as a consequence of a current lack of professional leadership in these services. In the absence of professional leadership for culture, Members understandably have looked to the Destination City team for support – but this is not their prime role. The situation has arisen because of a void in the officer organisation.
- 9.7 The Target Operating Model usefully introduced the notion of Heads of Profession, and there is a recognised role of Head of Profession for Culture which is currently vacant following the departure of the Barbican Centre’s Director of Arts & Learning who left to take up a new role in December 2023. The Head of Profession or equivalent is responsible for the development of the eagerly anticipated culture strategy. Up to this point, the Head of Profession is not a full time position but attached to an existing role. Following the departure of the postholder, a restructuring has taken place in the Barbican Centre which has reshaped the role with agreement that the Head of Profession for culture will rest elsewhere in the Corporation.
- 9.8 I am struck by the number of residents who have raised with me the importance of professional leadership of culture and heritage, and this informs my recommendation that culture needs a Head of Profession with capacity and resource.

**Recommendation 13: Request the Town Clerk/Chief Executive to consider options for the future Head of Profession for Culture as described and make an appropriate appointment to progress the culture strategy**

- 9.9 Whichever option is chosen (or a variation of one of these) it is plain that the Destination City programme and the culture strategy are closely linked. Members

and the Town Clerk/Chief Executive are clear that work on the culture strategy needs to commence as soon as possible. This will relieve the pressure on the Destination City team to fill what is currently a gap.

- 9.10 My terms of reference ask me to delineate the cultural strategy from the Destination City programme, and the diagram on page 26 above illustrates that in the new model the cultural strategy will contribute significantly towards the Destination City programme. The cultural strategy will have a wider and independent life of its own, reporting to the Culture, Heritage & Libraries Committee. The Destination City programme will of course have its own resource base to support cultural interventions linked to the programme. It would help if the new cultural strategy aligns clearly to the themes of the reshaped Destination City programme. The cultural strategy should incorporate events-based commitments like Sculpture in the City where these continue to be seen to offer value for money.
- 9.11 The culture strategy should also draw upon priorities which will emerge from market research conducted through the insights programme. The appetite that I have heard is for interventions based on food – like street markets – as well as light festivals, outdoor movie screenings, participation in the London Fashion Week which was very well received by those attending during my research. The culture strategy should identify and prioritise new cultural attractions for which resource will be available through the cultural planning contributions available through the new City Plan 2040.
- 9.12 My recommendation to align the new culture strategy with the Destination City vision relates to the need for a strategic and collaborative approach that is focused on ‘steering, not rowing’, in other words on achieving the outcomes that the City of Corporation wishes to achieve rather than necessarily the direct delivery of these activities. The ecosystem and capacity of cultural, heritage and visitor organisations in the Square Mile is so rich that many partners for service delivery are readily available. One practical example emerged during my work: that rather than manage the Monument directly, this visitor attraction might better be managed through a partner organisation that has already stepped forward as interested in this possibility. This should be seriously explored, and as a model of working it is worth looking at for other currently directly provided services. The benefits of third party partnerships (note, this is not outsourcing or asset transference) is that it can enable a more single minded operational focus on excellence and innovation, and liberate the CoLC to achieve a better strategic perspective. This approach could be considered as a package with other Destination City related venues, including the Roman Baths, City Information Centre and City Art Gallery, potentially linked to marketing and support for walking tours that connect together these points with the other major visitor attractions. Dublin City Council has recently announced a partnership with OpenAI to support tourism through bespoke visitor tours which open up numerous possibilities, for example the suggestion made by one Member for a walking tour on financial and professional services, taking into account the Stock Exchange, Lloyds and so forth.
- 9.13 The cultural strategy can also contribute to the activation of shop unit voids that currently feature heavily in parts of the Square Mile and reduce visitor appeal.

Working with Business Improvement Districts and companies that specialise in pop-up units and meanwhile uses, the cultural strategy can help secure shop front windows for creatives and artists in subsidised, currently empty shop units.

- 9.14 The Balloon Museum at the Old Billingsgate Fish Market provides an excellent case study in the potential of the Square Mile to be a most extraordinary global destination. The Balloon Museum is a time limited attraction in Old Billingsgate which in 78,000 square feet was visited by 200,000 people in the first 2 months of its opening. It showcases interactive installations and artworks created by 18 internationally renowned artists. The only intervention necessary on the part of the CoLC (which was critical) was regulatory permissions such as public queuing on the terrace alongside the Thames. This building has hitherto been used for corporate events and therefore not open to the general public. The approach that the Corporation of London needs to take to build on the obvious existing community and commercial appetite for destination attractions is to be facilitative, problem-solving, collaborative and – where it is necessary, as it will often be – to add in a quantity of funding to support cultural priorities. A commercial ethos with a can-do attitude.

**Recommendation 14: Align the new culture strategy with the Destination City vision in an approach that is collaborative, develops new partnerships and sets its sights on the City of London as an international cultural and heritage destination**

- 9.15 The potential for the London Metropolitan Archives (shortly to be rebranded London Archives) to relocate from its current site in Islington to purpose built accommodation within the Square Mile should also be explored to maximise the agglomerative impact of centres for excellence for internationally distinguished heritage collections, as well as mitigating a likely medium term commercial risk for the City of London Corporation. Geographic proximity between London Archives and the new London Museum would generate international research and scholastic attention. Additionally, the proposal for a City Livery Workshop at the former fish market adjacent to Smithfield Market has enormous potential. This would simultaneously provide great spaces for artisans and creatives to work; provide a boost to apprenticeships; and agglomerate the heritage/visitor attraction of Smithfield Market as the international focal point for London's heritage. These proposals merit detailed feasibility work to understand benefits and costs. Additionally, Livery companies have told me they are willing to contribute in a variety of ways such as opening up their buildings and halls to contribute to the Destination City ambition.
- 9.16 Resource availability to support the funding of the ambitions of the culture strategy will be supported by the new Destination City programme and also commercial branding partnerships; philanthropic funding; proceeds from developers' cultural contributions; and applications to the neighbourhood and strategic elements of the Community Infrastructure levy. In order to come to fruition, all of these opportunities will require the professional leadership of the Head of Profession.

- 9.17 The Head of Profession or equivalent needs to be in place to drive forward the culture strategy and ideally initiate a significant level of engagement and consultation in order to mine the very best ideas and also develop the ownership of all those with a contribution to make, which is many. The process of developing the strategy is as important as its content, and I sense a widespread keenness to contribute. The opportunities in the wider area of Smithfield, Charterhouse and Barts require a concerted effort to ensure that the undoubted excellence of the new London Museum is reflected in the neighbourhoods in which the Museum will be located. Other governance aspects of the culture strategy, including the work of the Culture, Heritage & Libraries Committee, are explored later in this report.
- 9.18 The Corporation's recently adopted strategy to become a Global City for Sport is both well timed and well judged, and as with culture is an important feature of the Destination City strategy. I am very impressed with the proposals led by the Central London Alliance working with two BIDs (Aldgate/Cheapside) and the City of London Corporation for Summer 2024 to be a Summer of Sport in the Square Mile, featuring various participative activities such as pickleball and beach volleyball. This programme is entirely funded by external and partnership finance, and is an excellent case study into what my review suggests should be a future pattern of working. These partnerships will prosper quickly if the CoLC could develop more seamless approaches to core responsibilities such as licensing which are not always digitally enabled and can become disproportionate obstacles to achieving partnership goals.

## **10. Public realm**

- 10.1 As the Chairman of the Policy & Resources Committee has written "Destination City is nothing without an outstanding built environment". It is impossible to conceive of a high quality visitor destination that does not also have a high quality public realm. The CoLC has burnished its credentials for place-making, notably with the recent relocation of New London Architecture to the London Centre adjacent to the Guildhall, and host of the world's largest architectural festival, the London Festival of Architecture which celebrates its 20<sup>th</sup> anniversary this year. Longer term, the prospect of the NLA relocating to new, purpose built accommodation within the City provides additional opportunity for the City to build on its already strong global reputation for creativity and excellence in architecture and design.
- 10.2 The CoLC is putting significant effort in to transforming the quality of public spaces and as a lifelong visitor to the City, I am confident in saying that the results are becoming evident. The importance of streets and spaces that are attractive and sociable places which provide a congenial setting workers, residents and visitors alike cannot be overstated. The City of London has legacy challenges to overcome in the public realm – sometimes narrow pavements and car dominated roads with a legibility that is undermined by the orientation constraints of tall buildings. Happily, the Transport Strategy and the draft City Plan 2040, align with the objectives of Destination City and the need to implement people-friendly policies for a high

quality urban neighbourhood. The City Plan is in effect the spatial expression of Destination City.

- 10.3 Supplementary Planning Guidance (SPG) in the form of the prospective Cultural Planning Framework will provide the policy basis for all developments to make contributions to culture. This framework will ensure significant cultural contributions to the Square Mile, not necessarily within the particular development that has generated this requirement. The framework provides the opportunity to guide the development of the Square Mile's cultural infrastructure but this will need the professional input of the Head of Profession which was explored earlier. The Cultural Planning Framework will make a crucial contribution to the new Destination City programme, including as it does detailed audits of the Square Mile's current cultural infrastructure and therefore identifying potential gaps in provision. The emerging Cultural Planning Framework takes a comprehensive approach to cultural infrastructure, identifying the opportunities that exist in the nine districts of Chancery Lane; Barbican & Smithfield; Liverpool Street; Fleet Street; St Paul's; Bank; Leadenhall; Aldgate; and Riverfront.
- 10.4 The new Destination City programme will add operational momentum to the adopted City Plan by providing guidance on the cultural and visitor uses which new developments might feature, especially in ground floor uses, meanwhile uses and funding to support these initiatives. Of course, Community Infrastructure Levy funding for cultural investments is a legitimate use of these funds. These levers can help achieve significant cultural advances, for example in the development of, for example, artistic and creative spaces, museums and galleries, and creative workspaces. Pipeline proposals for relevant capital projects (for example, the possibility of a new Monument Visitor Centre) need to be assessed alongside all other options and opportunities.
- 10.5 The City Property Association's impressive report, *Visualising Destination City*, is simultaneously an insight into the ways in which the City's public realm needs to evolve and also the extent of the 'buy-in' from business partners to the concept and ambition of Destination City. Experimental road closures (for example, of Chancery Lane and Widegate Street) are important initiatives to create the more "*attractive streetscapes, welcoming places and spaces and active travel*" that the CPA urges the CoLC to adopt. Many consultees were enthusiastic about the prospect of more weekend street closures, street markets, landscaped streets with activity spaces. The St Paul's Gyratory Transformation Project is an outstanding case study into what is possible. The improvement of the public realm to achieve better public spaces opens up a myriad of opportunities for these spaces to be used for the cultural, sporting, food-based activities advocated in the earlier section on Culture & Sport. These ideas need championing and organising, and this is an important feature of the Destination City programme.
- 10.6 The opportunities to advance liveability and visitor interest are not only through the planning and transport system. The opportunities to advance liveability and visitor interest are not only through the planning and transport system. The CoLC is a major

landowner (with corporate, operational and investment properties) in the Square Mile. The City owns directly managed properties where it can have a direct influence and freeholds subject to long leases where control is in the hands of the leaseholder. City Fund owns 81 properties in total of which 15 are directly managed – a substantial proportion of which is Leadenhall Market. City Estate owns 43 properties in total of which seven are directly managed. Except for Leadenhall the properties are not typically on the core retail streets. The strategy for these properties will obviously be primarily commercial, but within this there must be a space for wider considerations of the visitor and cultural attractions that the City seeks to achieve. In one conversation, a colleague referred to the diverting trajectories of Oxford Street and Regent Street – driven by their respective ownerships. While Oxford Street sites are primarily owned privately and work towards short term commercial objectives, Regent Street is owned by the Crown Estate. The Crown Estate applies lease conditions at both Regent Street and St James's which ensure that its occupiers enhance the quality of the visitor experience, for example through *“attracting international and UK visitors...and attracting retailers which are personal, distinctive, stimulating and eclectic”*. The Destination City programme can help support, market or curate similar moves towards quality and diversity, especially at Leadenhall Market, which is simultaneously an international visitor destination and also a poor conversion of visitors to spend because of the current retail mix. There is widespread stakeholder support for the CoLC to take a longer-term, more responsive approach to its lease requirements to build quality, diversity and visitor appeal. I have seen particular examples of CoLC commercial leaseholders who have developed tangible plans for cultural enhancements awaiting an appropriate agreement with estate management. In some of the city's most prestigious retail developments in private ownership, bespoke lease agreements are made to ensure the right quality of tenant and activated units; a similar approach should be taken by the CoLC as a commercial landowner.

**Recommendation 11: Ensure lease conditions in relevant commercial areas reflect a curated and appealing visitor experience.**

- 10.7 Smithfield Market presents a once in a lifetime opportunity for the City. It is an extraordinary site, reminiscent for me of the possibilities that were opening up for Battersea Power Station in the second decade of the 21<sup>st</sup> century. The crucial element for the Destination City programme is to add value to the plans that are already developing – across all the workstreams in the programme, including culture, public spaces, the involvement of young people and diverse communities and the opportunities for business investment. A coherent programme approach that draws together the various relevant interests and services is essential if opportunities are not to be lost. The Corporation needs an approach that complements the scale of the Museum's ambition – over 2 million visitors a year to Smithfield market, and opening hours that reflect the way Londoners live and work today – opening at 7am during the week, and until midnight on Fridays and Saturdays. This is a gamechanger.
- 10.8 I had many conversations about the contribution that the natural environment, historic heritage gardens and open spaces can play in supporting visitor appeal. It

was pointed out that 60% of responses to the corporate plan are about the natural environment. There is a sense in which Destination City has not yet embraced the quality of the historic gateways to the city and added value to their utilization and enjoyment. Public realm interventions need to focus on the historic gateways to the city with guidance to historic heritage/Shakespeare/gardens and green spaces on sites like Postman’s Park and Bunhill Fields. The proposed Destination City programme focus on the spaces between buildings and the pedestrian experience will accelerate this demand for an approach that values natural environment and open spaces. This is not a novel approach – improving walking routes beyond the main thoroughfares – but is an absolutely key feature of a liveable City that is also a destination.

- 10.9 Interviewees referred to the public realm’s *“Look and feel strategy”*, now taken up by the Culture Mile BID which has employed the services of urban design and transport consultants. While these developments are encouraging, it is essential for the CoLC to engage in their work and contribute to their thinking and potentially their implementation.
- 10.10 There is longstanding interest in improving wayfinding in the Square Mile, which has noticeably improved with the introduction of 200 Legible London signs in 2022. The LPA report makes the useful point that mobile technology is enabling visitors to find and explore lanes and alleys in a new way. Other visitor destinations have developed themed walking tour apps which guide the visitor around points of interest and provide historical and architectural/design interpretation. These are ideas that belong in the public realm workstream of Destination City – and could be linked to the City Wi-Fi landing page mentioned earlier.
- 10.11 Publica’s work on the cultural planning framework, referenced elsewhere in this report, will become a key tool to shape the cities spatial experience, very much in the way envisaged by the late Deputy Mark Bostock.

## **11. Business and investment**

- 11.1 The forthcoming SME strategy is important to Destination City. Hundreds of cultural and creative organisations are SMEs and many others provide hospitality support to visitors. The adoption of a wide-ranging and collectively owned strategy enables the City to raise its game in supporting SMEs. The Cultural Planning Framework provides the basis to provide high quality units from which SMEs could work, and the City’s Small Business Information Centre Business Advisors are ready to support this expansion of the current offer.
- 11.2 The Destination City programme should embrace the Corporation’s work with Square Mile businesses and also prospective inward investors, domestically and internationally. On the local front, the Square Mile’s business landscape has been transformed through the introduction of what are now five Business Improvement Districts. The BIDs, by their nature, are closer to many of the city’s businesses than the CoLC is able to be, and the Corporation itself sponsors the BIDs.

- 11.3 Having said that, the relationship with the BIDs continues on an evolutionary basis. In my conversations with BID chairs and chief executives, they are all clear that they want to work collaboratively with the Corporation.
- 11.4 As described earlier, this partnership working could and should involve the Corporation commissioning BIDs for specified activities like my proposed approach to the occupation of currently void shop units, to the long weekend including potentially incentives for shoppers and diners on Fridays and/or Mondays and the organisation of a regular programme of events on these days to incentivise spending on these days. The BIDs could also work with the CoLC to commission an insights programme together with the extensive data already held by CoLC departments.
- 11.5 The existence of the BIDs enables the CoLC to take a more strategic overview of its relationships with businesses in the Square Mile – and those that might relocate to the city. The team that coordinates the relationship with the BIDs sits in the Department of Environment, and it also now holds responsibility for the development of an inward investment unit. This new unit will identify and encourage new inward investment in target areas. There is every reason to believe that the scale of interest will be significant. The new London Museum could be compared to the opening of the Guggenheim museum in Bilbao – with the attendant global interest from city leaders, business people and international property investors. Destination City should be ready with the red carpet and a relationship management approach that complements the new London Museum.
- 11.6 During my review, I was directed to Station F which is a Parisian campus providing “the world’s largest startup campus” for young entrepreneurs and startups, currently occupied by 1,000 startups with over 30 programmes and services which include events, workshops, mentorship, professional services and food/beverage/housing support. The setting for Station F – a converted railway yard – provides the all important context and atmosphere for collaboration and energy. London has no current equivalent to Station F, and therefore, in the estimation of the proposers, currently lacks a comparable centre for incubation of technologies and innovation in areas like AI and cryptocurrency. The City of London certainly has the connectivity, vintage buildings and wider infrastructure to host such a centre. Such a centre would provide a national and international focal point for the development of innovation and entrepreneurship. I am not in a position to recommend this should move forward as a feasibility study at this stage, but it there is credible support from many partners of the CoLC to support initiatives like this which create space for new business incubation and this could be a model the Corporation may wish to support in future.
- 11.7 Destination City will be the cement that ensures a unified and tailored service to potential relocating businesses. The team at Mansion House which supports the Lord Mayor also has a crucial role to play in the proposed premium concierge service and my intention is that the central recommendation helps drive forward the Lord Mayor’s vision for a higher level of tailored service which engages with national and



international business visitors who have had contact with the City of London in order to build on positive relationships and potentially encourage inward investment. The vision for Destination City embraces not only tourists and leisure visitors, but also employers and workers. The end result we seek is that international business leaders see the Corporation as a 'can do' organisation with the personal touch that brings positive relationships to the table along with the many other attributes the city has to offer.

- 11.8 I find this an attractive and compelling vision. If the recommendation that the Destination City programme is more strategic and not events based is approved (Recommendation 1) this provides the possibility for a more pro-active, forward looking capacity to support the friendly relationship management service of which the Lord Mayor has spoken. I have in mind an approach to new business attraction that champions the interests of relocating businesses, 'can do', focused on trouble shooting and working across CoLC boundaries to achieve the proposed priority of a premium concierge service.

## **12. Children and young people**

- 12.1 I feel it important to highlight the relevance of children and young people to the Destination City programme for a number of reasons – first, they represent the adult workers and consumers of the near future, and inculcating an appreciation and love for the City of London is likely to make a good medium-term investment; second, families are an important target group in their own right; third, the CoLC has a strong commitment to children and young people, including through philanthropy, as does its wider eco system including the Livery companies and this must be equally relevant to Destination City.

### **Recommendation 12: Encourage relevant services working with children and young people to prioritise school visits that align with the Destination City priorities and the development of skills and employment opportunities in the hospitality industry**

- 12.2 It is difficult to identify baseline measures of the visits by young people to the City, but the data and feedback I have had is that these may not have recovered from the pandemic period. I have been told that as teachers in Greater London now often live further afield, their knowledge and awareness of the city's heritage – including ancient Rome – cannot be relied upon. Destination City needs to promote and market the city's attractions to schools, develop relationships with them and invest in making the necessary links with the curriculum. It would be helpful if the Destination City website were also a resource that teachers and educationalists could use, in addition to the generalist leisure visitor.
- 12.3 Officials and Members in the Education department are enthusiastic to work with the Destination City team, although they are currently unclear if the strategy embraces working with schools, children and young people. My hope is that this report encourages relevant officers (in the Education department and elsewhere) to redouble their efforts to encourage young people into the Square Mile. Happily,

there are resources available in the Education Department's cultural and creative grants and funds to support school transport visits.

- 12.4 Immense scope exists for the development of skills, training, apprenticeships and jobs in a section of the economy that is growing quickly and can be highly attractive to young people. The CoLC already undertakes an impressive range of programmes to support the development of young people's skills and apprenticeships. The City's Livery companies provide a unique and remarkable resource to support training needs, and the CoLCs organisation of the annual London Careers Festival (contemporaneous with the publication of this report) underlines the city's pan-London role to apprenticeships and access to good, well-paid jobs. The New London Architecture has an excellent learning programme which inspires young people about London's built environment and engages them with a variety of careers. Many other elements of the City of London's orbit have internationally leading-edge opportunities for skills development in the cultural and creative industries – notably the Guildhall School of Music & Drama.
- 12.5 The additionality that the Destination City programme can add to all of the existing excellent work undertaken by the CoLC includes the identification of ground floor and meanwhile uses that are most likely to be of appeal to young people, for example in the fashion, film, music and gaming industries. A proactive approach to developing relationships with those working in the education and training fields (especially the Livery companies) and looking for opportunities to support young people into work should be taken. The proposal for a City Livery Workshop outlined earlier in this report is a specific opportunity that should be considered. The London Museum has adopted the goal that every one of London's 3.3 million 5-24 year-olds should come to the new museum. The challenge for the rest of the Square Mile is to complement and reinforce this ambition so that 3.3 million youngsters do not simply go to the Museum and back home again, but stick around in the City to sample some of its other attractions.
- 12.6 In order to provide an example from my earlier career, during my decade at Wandsworth Council one of the most spontaneously popular and admired initiatives was a Young Chef of the Year competition run by the civic Mayor's office in Wandsworth. This initiative was enthusiastically supported by schools, young people and local hospitality companies. The food and beverage industry is essential to the success of Destination City and provides immense potential for future employment. It also meets other goals – of social inclusion and civic engagement – and will be supported by the private sector as well as within the CoLC itself.
- 12.7 I appreciate that there is a limit to the availability of staff resources but by working energetically and collaboratively across departments and with partners, much can be achieved even within limited resource. The starting point is to be clear on the priorities and work programme for Destination City – in this case, should children and young people be a priority, and if so what are the precise targets for the coming year? My conclusion is that they should be, focusing on nurturing knowledge and

understanding of the city's heritage and culture, and the skills and economic opportunities – particularly in the creative and hospitality sectors.

### **13. Governance & leadership**

- 13.1 Since its inception, Destination City has dual reported to the Policy & Resources Committee and the Culture, Heritage & Libraries Committee. The decision of the Court of Common Council was that strategic issues relevant to Destination City should report to the Policy & Resources Committee while operational issues should report to the Culture, Heritage & Libraries Committee. In practice, this delineation is difficult to achieve. It is unsatisfactory because it can create blurred responsibilities, compromises accountability and can inhibit swift and predictable decision-making.
- 13.2 In terms of internal CoLC governance, I suggest in this review that a formal programme methodology should be adopted for Destination City in line with the Corporation's recently adopted policy on project and programme governance. This will provide a level of planned and detailed rigour that the programme requires. One of the key contributors to this programme will be drawn from culture, heritage and libraries. One way forward could be for the Destination City programme to report to the Policy & Resources Committee while the wider cultural strategy reports wholly to Culture, Heritage & Libraries Committee. This would appear to be consistent with the position of other services relevant to Destination City – they report to their relevant functional Committee, although if the activities of a service are incorporated within the Destination City programme, Policy & Resources Committee will have oversight.

#### **Recommendation 3: Align accountability for the refreshed Destination City programme to the Policy & Resources Committee while aligning accountability for the culture strategy to the Culture, Heritage & Libraries Committee**

- 13.3 Currently, in addition to internal officer arrangements, a City Envoy Network convened by the Chairman of the Policy & Resources Committee provides a sounding board of external business people who help guide the Destination City team.
- 13.4 The logic of my report argues for a strategically led Destination City programme. This should reflect a partnership and governance approach that is broad and inclusive, recognising that the fundamental strengths of the Square Mile as a location for visitors and business are widely distributed across the City Corporation and outside with its numerous business and cultural partners.
- 13.5 Destination City greatly benefits from the current City Envoy network which could be built upon and enhanced. A reformed City Envoy network – a Destination City Board – would provide a public/private sector partnership that supports implementation of the entire programme and provides recommendations to the Policy & Resources Committee on its priorities and spending plans. The logic is that the Destination City approach depends upon collaboration between the CoLC, the Business Improvement Districts, cultural and heritage organisations and the wider business community. I envisage representation from all these sectoral groups on the new Board.

13.6 Potential terms of reference and membership of the new Board are set out in Appendix 2.

**Recommendation 4: Create a new Destination City Board to build on, and succeed, the current City Envoy network, with terms of reference and membership as set out in Appendix 2**

13.7 In the longer term, the Destination City Hub could spin out from CoLC as a charitable foundation trust. There are parallels elsewhere in the world for such a development (as some interviewees pointed out) and there may be attractions in this model – in particular, the greater degree of focus and potentially improved prospects of fundraising. The leadership, energy and drive to create a new organisation might come from the Destination City Board if it took an ambitious approach to its work. This is a possibility that is clearly some distance down the road and not a recommendation in this report, but I mention it as an example of how a dynamic innovation can quickly develop its own momentum. The willingness of the CoLC to consider such innovation tends to be an attractive incentive for people with impressive credentials who are not instinctively drawn to bureaucracy to join the Board.

13.8 I now move on to the most appropriate organisational location for the Destination City Hub. The logic of my findings is that Destination City is a whole organisational and collaborative programme – the City’s principal place-based programme, reporting to the Policy & Resources Committee. As is clear in this report, Innovation & Growth deserve credit for successfully establishing Destination City and having the self-awareness to recognise that two years on is the right time for a review of its operations. Going forward, the ‘fit’ with Innovation & Growth – which already leads on a major and successful corporate program in the Climate Action Strategy – needs reflection. Innovation & Growth generally has a focus more on national and international financial and professional services than the geography of the Square Mile. I have considered what other options might be plausible and conclude that the Town Clerk’s department is the optimum alternative. My thinking is that this location correlates most closely to the corporate and cross-cutting nature of the overall programme. Of course, there are other options – including staying in Innovation & Growth; Communications & External Affairs; Children & Neighbourhood Services; Environment Department; and (if a decision was made to reinstate the department) Culture, Heritage & Libraries.

13.9 Wherever the Destination City hub sits, professional leadership both for the hub itself and also for the overall programme and governance is essential.

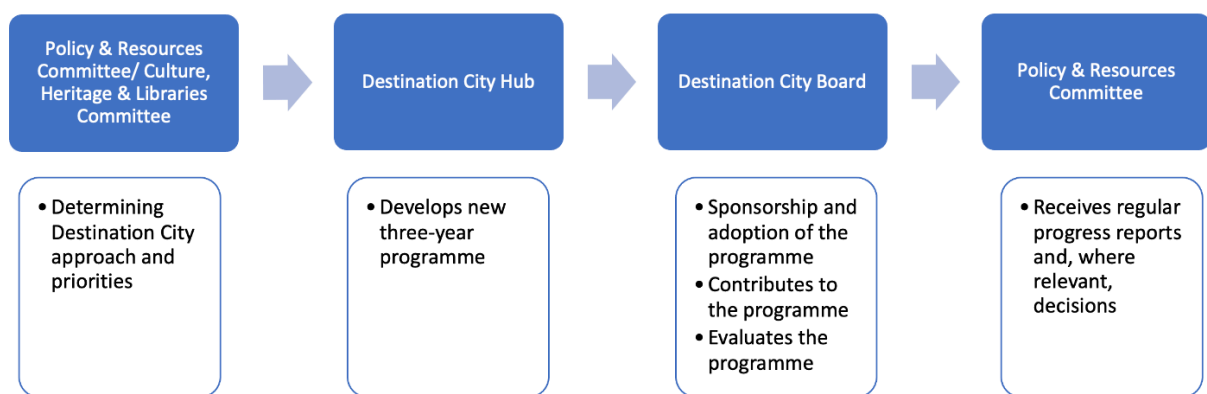
**Recommendation 6: Request the Town Clerk/Chief Executive to consider the future organisational location for the Destination City Hub, including the possibility that it should be relocated to the Town Clerk’s department to enable cross-departmental delivery.**

## 14 Conclusions

- 14.1 The ambition for Destination City has won the attention and support of Members, officers and stakeholders alike. There is reason to believe that it is becoming widely understood by residents and City workers. The Destination City team explained early in my review that they felt the programme had the potential to grow beyond its original remit because inspiration had been generated and hopes raised that the programme could deliver on a range of new objectives; they hoped that this review would look afresh at how the programme might develop to meet these hopes and expectations.
- 14.2 The post-pandemic City, developing over the last two years, has moved the business plan goalposts. The original targets for recovering spend appear achievable while the targets for recovering visitor numbers currently appear very challenging. A change in gear is recommended, moving from the organisation of one-off events to a longer term curation of the Square Mile as a place to live, work and visit; and a temporal approach to particularly increasing visits and spend on Fridays through to Mondays.
- 14.3 This report argues for an ambitious, wide-ranging and inclusive Destination City programme which focuses on people and place. All relevant CoLC services can contribute to the wider goals of Destination City, while a tightly defined programme will focus on driving the identified priorities. The programme should be supported by a Destination City Hub which facilitates the programme and supports the decision making of a collaborative public/private sector Board. If adopted, this programme represents a strategic direction over a number of years.

*A simple, specific schedule of priorities*

14.4 In order to provide clarity on the shared goals to which all participants should be working, a simple schedule of priorities should be identified. Subject to feedback, these priorities should include (a) improving pedestrian connectivity between places; (b) a consistently lively and animated ground floor experience to reduce voids, enable more food markets, sports, outdoor movie screenings, light festivals, fashion events; (c) a premium concierge service for relocating businesses; and (d) a particular focus on driving footfall between Fridays and Mondays. The detail of this programme will be developed in a sequence described below. The Destination City Hub should aim to reflect the City’s goal to be a pro-growth and business friendly team with the personal, can-do touch.



*Relevant, tailored data*

14.5 Market research and data helps avoid short-term ‘*initiatives*’ and supports longer-term, strategic development which is firmly embedded in performance and customer insights. Metrics for the Destination Programme are proposed in the report, and these should be consolidated within a City Intelligence Dashboard. The commissioning of additional data and insights should take place in partnership with Business Improvement Districts, when it is clear what additionality is needed layered on top of data already available. This should focus on market research that illuminates the perceptions of residents, workers, leisure visitors and inward investors. A particular emphasis is given to the need for regular resident’s satisfaction survey as residents are reliable ‘eyes and ears’ of daily life in the city.

*Culture Services Strategy leadership*

14.6 The culture services strategy should be owned and driven by the Culture, Heritage & Libraries Committee. This needs to be led professionally by a Head of Profession. The Town Clerk and Chief Executive has options for where this role best sits in the officer structure. Wherever the Head of Profession is located, they need to have the capacity to support the CHL Committee and provide professional leadership to the production and implementation of the culture strategy. Ideally, the Head of Profession should report to an SLT Member who is the lead officer for the overall

Destination City programme. Simultaneously, the Town Clerk/Chief Executive should consider the optimum organisational location for the Destination City programme.

#### *Governance*

- 14.7 The Destination City programme should be overseen by a Board with representation internally and externally, and a majority of Board Members coming from business and cultural organisations. This Board should oversee the Destination City programme and workplan, make recommendations for spending priorities of the approved growth budget and report to the Policy & Resources Committee. The Board should identify opportunities for financial sustainability and the potential for the Destination City Board and Hub to become an independent trust in the future.

#### *Next steps*

- 14.8 Depending on the way forward that Members endorse, it will be important for a realistic approach to the transition to implementation. This will require investment in organisational design and a careful approach to translating policy intent into practice.

#### *A shared endeavour*

- 14.9 Following the example of the climate action strategy, Destination City has the scope to become a shared endeavour of which Lord Lisvane wrote, and to which many parts of the CoLC can contribute and own. The ultimate outcome of a City that is uniquely magnetic is one which will need widespread contribution and support. In the process, it can support organisational development towards a long-term goal.

#### *Communications – core script*

- 14.10 As requested in my terms of reference, Appendix 3 provides a 1-page core script for the purposes of communications within and outside the Corporation of London.

## Appendix 1– Destination City dashboard

Target (performance indicator)	Source
Number of visits per year	BT/O2 mobility data; GLA dashboard; RJS Associates
Spend by visitors per year	Mastercard data; GLA dashboard; RJS Associates
Conversion rate (visitors to spend)	GLA dashboard; RJS Associates
Advocacy rate (net promoter score)	New requirement – market research (including resident survey benchmarked at December 2022)
Occupancy rate at hotels	RJS Associates provides & hoteliers have said they will supply
Numbers of businesses and supported by the new premium concierge service and the % of these businesses that relocate to the City	New requirement
% of total visits made between Friday and Monday (aiming to increase)	GLA dashboard
% of food/beverage outlets open over weekend	GLA dashboard
Website hits/social media followers	CoLC data
Domestic and international originating region/country (to drive marketing strategy)	London & Partners
CoL share of London restaurant spending	Mastercard data



## **Appendix 2 - Destination City Board Terms of Reference & membership**

### **Purpose**

The mission of the Destination City Board is to lead the implementation of the growth strategy for the Square Mile as a destination.

Board membership is determined by the Corporation's Policy & Resources Committee. The Board chair is the Chair of the Policy & Resources Committee. Board membership will be aligned with the 4-year electoral cycle.

It is expected that the Destination City Board would be advisory to the Policy & Resources Committee at regular intervals which are yet to be determined.

### **Objectives**

- Implement the Destination City programme in accordance with the strategic direction provided by the Policy & Resources Committee.
- Recommend strategic direction for the Destination City programme to the Policy & Resources Committee.
- Maintain awareness of key trends relating to world class placemaking.
- Guide the Director of Destination City on priorities and spending plans.
- Receive regular insight reports on performance and key metrics, and commission further work where necessary.
- Provide external advocacy for the City of London as a world class destination.
- Develop a commercial ethos to return on investment, with the goal of a buoyant income stream to fund interventions.

### **Membership**

Should the Destination City Board be confirmed to be a part of the governance model, then further work will be undertaken on how best to determine the appointment process for internal/external representation. The following is an initial view on the possible composition of the board:

4 x CoLC Members (1 each from Policy & Resources; Culture, Heritage & Libraries; Planning & Transportation; Children's & Community)

4 x business representatives

1 x BID chair/CEO

1 x cultural institution chair/CEO

1 x London & Partners representative

1 x Residents' Member representative

1 x Director of Destination City

## **Appendix 3 - DESTINATION CITY – core script**

### **What is Destination City?**

Destination City is the growth strategy for the Square Mile as a location. In the decade ahead, the City aims to be not just a global magnet for international talent and finance, but a global magnet as a place.

### **What has Destination City achieved so far?**

In the first phase of work, between launch in May 2022 and January 2024 effort has focused on the organisation of two large-scale events, held in 2022 and 2023, and on launching a Destination City website. Encouragingly, visitor footfall and spend have continued to rise during this period although footfall is now distributed very differently across the 7-day week, with weekends now busier than in 2019 but Mondays and Fridays much quieter.

### **What is next for Destination City?**

Destination City will embrace all forms of destination purpose - including business and leisure destination growth. The programme will be collaborative with partners rather than an independent and autonomous team. Future priorities are to improve pedestrian connectivity between places enabling more food markets, sports, outdoor movie screenings, light festivals, fashion events, a consistently lively and animated ground floor experience, a premium concierge service for relocating businesses and a particular focus on driving footfall between Fridays and Mondays

### **How would these Destination City priorities be taken forward?**

These priorities will be shaped into a Destination City programme into which all relevant Corporation of London services – and our partners in areas like cultural services and Business Improvement Districts – will have an opportunity to contribute. Relevant services could include those related to culture, public realm, planning, active travel, estate management, children and young people.

### **How will the next phase of Destination City be funded?**

This second phase will be funded by financial provision already approved by the Policy & Resources Committee.

### **How will the next phase of Destination City be measured?**

The plan is to keep using the metrics of numbers of visitors and spend, but also to consider further measures including market research to measure sentiment.

### **Is there a Destination City partnership?**

Yes, the programme is very much a collaborative effort. In particular, it is proposed that a new public/private sector board comprising representatives of business, tourism and Business Improvement Districts as well as Corporation of London representatives will oversee the second phase programme.

### **What about the planned culture strategy?**

A new approach to culture will contribute to the Destination City programme but will have a wider purpose and autonomy. Culture will be led by a Head of Profession reporting to the Culture, Heritage & Libraries Committee. Further detail on these decisions will follow in due course.