

<b>Committee(s)</b>	<b>Dated:</b>
Culture, Heritage and Libraries – For Information	11/11/2019
<b>Subject:</b> City Information Centre: annual performance report and survey findings 2018/19	<b>Public</b>
<b>Report of:</b> Peter Lisley, Assistant Town Clerk and Director of Major Projects	<b>For Information</b>
<b>Report author:</b> Leanne O'Boyle, Head of Cultural and Visitor Strategy	

### Summary

This report provides a review of the City Information Centre's (CIC) performance for the last financial year (2018/19).

The Centre continues to perform well with the ratings for staff satisfaction at the highest it has ever been. In this year's annual user survey, 83% of users rated the staff as excellent (an increase from 68% in 2018), and 72% rated the quality of information as excellent (an increase from 53% in 2018). In line with these findings, our Mystery Shopper evaluation returned exceptional results with "overall quality" coming in at 97% (up from 80% in 2018).

Sales significantly exceeded last year's levels (an increase of 7.9% year-on-year), though footfall was down by almost 3% (likely impacted by a late Easter in 2019 and half of the 2018 Easter weekend falling in the previous financial year).

### Recommendation(s)

Members are asked to:

- Note the report and survey findings

### Main Report

#### Background

1. Since opening, the City Information Centre (CIC) has served just under 4.4m visitors, delivering £3.5m year-on-year in economic benefit for the UK tourism industry, and welcomed over 50 national and international delegations seeking advice on visitor information provision (viewing the Centre as a model of best practice). The Centre has also won many accolades including the top in the business – as Information Provider of the Year at the VisitEngland Awards for Excellence 2015. In this time, it has also seen significant changes to its operating and business models.

2. The City Information Centre continues to provide an important role in London and national tourism, partnering with national consortia, boroughs and promotional agencies including London & Partners, London Borough of Culture and England's Historic Cities to showcase the best the country has to offer.
3. Following extensive positive reviews, the CIC was recognised in 2019 with a Trip Advisor Certificate of Excellence.

### **Current position: footfall and income**

4. Total footfall at the CIC for the financial year 2018/19 was 373,314. This shows a decrease of 2.92% on 2017/18, 3% on 2016/17 and 1.39% on 2015/16 and an increase of 13.5% on 2014/15. Footfall initially kept pace with 2017/18, enjoying slightly higher figures in the second quarter, until in the third quarter it was significantly down on previous years, only recovering by year end.
5. Sales at the Centre for 2018/19 enjoyed significant growth in the second financial quarter, unlike last year. Despite April's income being down on last financial year (likely due to half of Easter falling in the previous year), the CIC enjoyed steady growth with August delivering almost 17% growth on 2017/18. Overall, the Centre generated a total sales figure of £592,761 in 2018/19 (7.9% up on 2017/18); this generated a profit of £138,624 (an increase of 10.2% on 2017/18).
6. This year (2019/20) shows signs that the strong growth is continuing with sales to August at £365,794.07 an increase of 11% on 2018/19.
7. As well as retail sales, the CIC generates income from renting its leaflet racks, screens and counter space (foreign currency exchange), and through promotional "takeovers" that see its windows and counter covered in advertising for events and attractions from across the UK. The total collected from these activities in 2018/19 was £73,174. This year (2019/20), to date £52,000 worth of rental and takeover deals have been secured, putting the Centre on target to achieve the same.

### **Current position: user survey**

8. The Centre's annual user survey is undertaken every summer and available from the Assistant Town Clerk and Director of Major Projects on request. Particular items of note this year include:
  - a. In a reversal of the trends noted in 2017 and 2018, the age of visitors was younger this year than in previous years. In 2019, 28% of all visitors were 34 or younger, compared to 13% in 2018. The largest age group were 45-54, comprising 33% of all those interviewed. The 65+ group only accounted for 6% of all visitors, a significant drop from 30% in 2018. These results help evidence the continuing demand for a face-to-face service by all user groups, despite the rise in social media information provision;

- b. There was strong growth in overseas visitors with domestic visitors being the second largest market for the first time. Visitors from Europe formed the largest single visitor group (43% up from 32% in 2018) with domestic audiences declining to 21% from 38% in 2018. This reflects a London-wide trend of falling numbers in domestic markets;
- c. Again, bucking the 2017 and 2018 trend, the number of visitors using the Centre while on day trips to London was down from 31% to 19%, which is balanced by a significant growth in hotel stays (and likely overseas markets) from 33% to 45%.
- d. Of particular note was the rise of Airbnb, with 69% of all users staying in an apartment/house (14% of all visitors). This perhaps reflects the younger demographic indicated in the survey;
- e. Reflecting the increase in income noted above, the survey also demonstrates a significant increase in purchases at the CIC (souvenir purchases up 38% from 7% in 2018), beating “information on places elsewhere in London” (down from 47% to 34%) and “information on places in the City (36% up from 20% in 2018) to the top slot for what users did while in the Centre;
- f. The Centre’s support of the wider London visitor offer is also demonstrated by the 92% (up from 54% in 2018) of users saying that they were visiting an attraction in the City “today”. The survey indicated an increase in visits to most City attractions, most notably St Paul’s Cathedral where 74% of visitors said they would visit the Cathedral either “today” or “this week” (up from 40% in 2018);
- g. 79% of all visitors used the CIC for the first time this year, a much higher proportion than in 2018 (67%). This reflects the increase in overseas visitors referenced above, as 86% of all overseas visitors were visiting the CIC for the first time, compared to just 53% of UK visitors;
- h. Continuing the trend for the past two years in visitors using TripAdvisor more than any other type of social media when planning their holidays, 73% of those interviewed use this platform more than any other type of social media when planning holidays (up from 54% in 2018). This reflects the 2019 award by the site which, following extensive positive customer reviews, saw the CIC recognised with a Trip Advisor 2019 Certificate of Excellence;
- i. In terms of visitor satisfaction and quality of information, the CIC received the highest ratings it has ever had. There has been a strong increase in ratings for staff, with 83% of users rating the staff as excellent (up from 68% in 2018) and 98% rating them either as excellent or good (down 1% on 2018 due to “good” decreasing from 31% to 15%). In addition, 97% of users rated the quality of the information as excellent or good, the same as last year (but with an increase of 2% on the rating of “excellent” in this category);

These results are in line with the scores seen for the mystery shopper exercise described below which saw increases in overall quality of experience;

- j. Respondents gave a strong endorsement of the CIC with regards to its role in encouraging visitors to increase the length of their stay in the City. 23% said that their visit to the centre “*greatly* increased” the likelihood of them staying longer, whilst 42% said it had “*slightly* increased” the likelihood (up from 13% and 14% respectively).
- k. Despite a fall in the percentage of visitors stating that the CIC “*greatly* increased their likelihood of re-visiting the City of London” (from 38% in 2018 to 23% in 2019), overall a significant increase in the *slightly* group (from 32% in 2018 to 45% in 2019) has led to an increase in the returning index from 2.1 in 2018 to 2.2 in 2019.

### **Current position: mystery shopping**

- 9. Each summer, the quality of service provided by Centre staff is assessed by an external provider (Tourism South East) through a series of six ‘Mystery Shopper’ visits. The headlines for this year are:
  - a. The overall quality of the experience at the Centre scored an outstanding 97%, up from 80% in 2018 and 90% in 2017;
  - b. Three members of staff scored 98%, a remarkably high score (and up from the Centre’s highest score of 95%). The average score was 91%, up from 80% last year;
  - c. No aspects of the Centre’s service were considered inadequate or poor;
  - d. The highest scoring aspects were “presentation of the Centre and staff” at 97% (an increase by 30% from 2018) and “overall quality of the experience of a visit to the Centre and sense of welcome” at 97%, (80% in 2018);
  - e. There was also an increase in the score achieved for “up-selling” which saw 80% this year against 77% in 2018. This reflects significant work on this competency with CIC staff, noting the need to the focus on income generation;
  - f. 2019 saw improvement across 7 out of 8 categories of the scoring system, with the remaining category, (“enthusiasm of staff and effectiveness in promoting the City of London area”) being as good as last year, at 90%.

## **Current position: supporting London and the nation**

10. The Centre is London's only centrally-located official tourist information centre – London not being as well served in this regard as other major cities. It continues to be recognised the world over as a model of best practice in the field of visitor information provision and London product knowledge. In 2018/19, the Centre has:
- a. Worked with the London Boroughs of Waltham Forest and Brent regarding promoting their respective Mayor of London's London Borough of Culture programmes during 2019 and 2020;
  - b. Partnered with England's Historic Cities as part of the City's participation in the England Originals campaign, hosting a stand at the 2018 World Travel Market;
  - c. Taken a Platinum Pledge to support a Plastic Free City and reduce its reliance on unnecessary single-use plastic. In addition, the CIC has supported the City's drinking fountains campaign by stocking a wide range of drinking bottles and bamboo coffee cups.
  - d. Agreed a partnership to sell Great Western Railways (GWR) tickets, enabling it to develop new visitor packages for some of the most popular destinations in England.
  - e. Partnered with Foxtrail to provide a new and unique urban adventure treasure trail. The trail starts and finishes at the CIC in a circular adventure which takes in world famous sites.

## **Corporate & Strategic Implications**

11. The City Information Centre is a key delivery agent for the City's Visitor Strategy, driving footfall to City attractions and other visitor products, enhancing the welcome for City and London visitors and playing a high-profile role in London's tourism economy while deriving recognition and profile for the City Corporation the world over.
12. The work of the Centre aligns with the City Corporation's Corporate Plan under its aim to support a thriving economy, in that it delivers against action 8a to "promote the City, London and the UK as attractive and accessible places to live, learn, work and visit".

## **Implications**

13. The City Information Centre has secured a robust business model that continues to achieve its Service Based Review targets. However, London's tourism sector is fragile and the impact of Brexit, terrorism, rail issues and other external factors

may yet take their toll on footfall which, in turn, will impact on the Centre's income.

## **Conclusion**

14. The City Information Centre is a significant asset in the City's cultural and visitor portfolio and has demonstrated its value as a mechanism for delivering benefits to London and the nation in the context of tourism, while deriving reputational gains for the City Corporation as provider of the service.
15. Its staff have worked hard to achieve the savings targets set under the Service Based Review and will continue to do so under the Fundamental Review. Should visitor figures fall in any significant way, the Centre will be vulnerable as there is no additional financial resource in its local risk budget to plug any shortfall.
16. The Centre is highly regarded by all its customers, as well as by the many City, London and national stakeholders it serves. It has a truly global reach and is the welcoming face of the City (and London) across the world's tourism industry.

## **Appendices**

- None

## **Background Papers**

- None

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