



HUMANKIND
RESEARCH

London Message Testing

L&P, City of London and GLA

INTEGRATED QUAL QUANT DEBRIEF, November 2017

THE PROJECT OBJECTIVE: to evaluate and optimise potential messages to be weaved into London comms

Within this there were two key questions for research:

REACTION TO MESSAGE AREAS

- How do people react to current messages?
- Which message best convince them that London is one of the best cities in the world?
- How can these messages be optimised?

WHAT DRIVES CITY CHOICES

- What are their criteria for 'best city worldwide'?
- What do they think / know about London *now*? What makes London great for them?
- How do they perceive London vs Great Britain

Starting with a large set of messages and values derived from past communications from the GLA, City of London, L&P and Freuds

The research was conducted with 4000 people: a mix of TOURIST, STUDENT and BUSINESS targets in 5 countries



LAUNCH

45 messages & 39 values from
GLA, City and L&P

Stakeholder workshop



OPTIMISE

12 messages with 5 values
each and an image board

Focus groups & interviews



VALIDATE

8 messages & 10 values

Online quantitative survey

Research conducted in Sept 2017 in France, USA, China, India & UK

Looking broadly at the attributes people look for in a city, we can see the context for the response to the messages:



Across audiences and markets the same values were important

TOP 3 VALUES PEOPLE SOUGHT

HYGIENE FACTORS

Safe

Attractive

Welcoming

Absence of these is a reason not to visit

NEXT 3 MOST IMPORTANT VALUES

CITY DIFFERENTIATORS

Cultural

Historical

Dynamic

These are the factors that drive interest

Conveying cultural richness, history and dynamism leads to more compelling and motivating messages – reflected in our stronger messages



Perceptions of London gave us some interesting context

- ⊙ Other major cities (NY, Shanghai, Singapore, HK, Paris) all have a clear values-based narrative
- ⊙ But there is little consistency around London's story
- ⊙ Instead it was often reduced to cliches or TV based imagery

- ⊙ Respondents were not as divided by audience type as one might expect
- ⊙ Instead knowledge/experience of the city has a big influence on attitudes towards London
- ⊙ Those that know London see it as a rich, vibrant city balancing modernity and history
- ⊙ But for those less familiar, perceptions are stuck in old historical London, lacking energy and vitality

A clear need to establish a stronger narrative for London with a progressive, modern vision for the city

Of 12 qual messages, we tested 8 in quant:

CITY OF OLD AND NEW:

London is a city of amazing experiences old and new – it has been an icon of culture from Shakespeare’s time to Harry Potter’s. From the Tower of London to the London Eye, with free museums focusing on everything from ancient history to modern science, there is something for everyone.

CITY OF DISCOVERY:

London is a city that surprises at every turn. Whether it’s your first visit or you’re a longstanding Londoner, there is always more to discover: from the established sights and big-scale attractions to the diverse neighbourhoods, local restaurants and bars, emerging fashion and trends, or the huge range of theatre, art and music venues throughout the city.

CITY OF WARM WELCOMES:

London is Open. Londoners welcome everyone from all parts of the world whether you come to study, work or visit. It’s a city with an open spirit, where all people, cultures, beliefs and lifestyles are valued.

CITY OF MANY CULTURES:

Londoners don’t simply accept each other’s differences, we celebrate them. London brings the vibrancy of so many cultures, which means never-ending opportunities for new experiences and inspiration.

CITY OF CREATIVE ENERGY:

London has an exciting history as a centre for creativity and free thinking, from Shakespeare to the birth of punk and the catwalks of today. This creative energy and cultural vibrancy can be felt in every aspect of London life: food, fashion, arts, exhibitions, shops, night life as well as innovations in science and business.

CITY OF OPPORTUNITY:

Whether visiting, studying or building a business, London is a place where everyone can pursue their dreams. London’s open, dynamic culture gives everyone the chance to be who they want to be. It provides access and connections to everything you need to grow either personally or professionally.

A WORLD LEADER:

London is one of the best cities in the world in which to live, work, study, visit or invest. It has a world class culture, universities and schools, and finance. All of this makes it the beating heart of the UK and a proud financial, social and cultural capital.

A CITY WHERE YOU GET THE BEST QUALITY OF LIFE:

London is a city that uniquely combines a modern, vibrant energy and culture with a huge amount of green spaces and parks. This means that everyone, whether here as a tourist, student or resident, can benefit from London’s dynamism alongside the opportunity to take time out and achieve a great work-life balance.

The final 8 messages were evaluated against 3 KPIs



Love: Establishes emotional salience and connection



Uniqueness: Differentiation against other cities



Impact: How much it makes them want to chose London for business, travel or education

See footnotes for questions

No single message 'won' overall – but several scored well with at least some audience segments



It is only when we look at response by audience, a picture emerges as to which message performs best overall

		OLD & NEW	DISCOVERY	CREATIVE ENERGY	WARM WELCOMES	OPPORTUNITY	QUALITY OF LIFE	MANY CULTURES	WORLD LEADER
TOURISTS	Love	111↑	109↑	104	102	97	94↓	94↓	89↓
	Uniqueness	124↑	107↑	113↑	101	83↓	89↓	95↓	89↓
	Impact	111↑	114↑	106↑	100	87↓	98	92↓	92↓
BUSINESS	Love	101	103	103	95↓	105	101	99	95
	Uniqueness	105↑	91↓	105↑	96	101	105↑	101	96
	Impact	93↓	100	105	89↓	105	103	98	107↑
STUDENTS	Liking	106↑	104	106↑	102	96	100	90↓	96
	Uniqueness	115↑	102	106↑	94↓	98	94↓	94↓	98
	Impact	97	99	102	99	106↑	102	93↓	102

↓ Sig lower than avg.* Lower than avg. - Same as avg. Higher than avg. ↑ Sig higher than avg.*

Base: n=3776 total

LOVE = B1. Overall, how do you feel about this statement? (Top Box)

UNIQUENESS = B5. How different does it make London sound, compared to other major cities? (TB)

IMPACT = B7. How much does this statement make you want to choose London for... (business, tourism, studying)? (TB)

*Significance defined as 4% point deviation from average 90% CI at the mid-point (50%)

For TOURISTS the 'OLD & NEW' message was strongest

CITY OF OLD AND NEW:

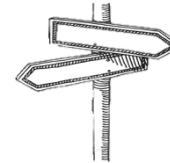
London is a city of **amazing experiences old and new** – it has been an icon of culture from Shakespeare's time to Harry Potter's. From the Tower of London to the London Eye, with free museums focusing on everything from ancient history to modern science, there is something for everyone.



Index on KPIs
Tourists – Old & New



Love
111



Unique
124



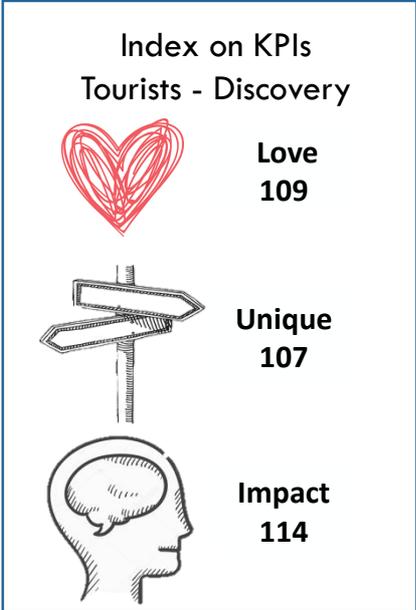
Impact
111

Very strong on all 3 KPIs, giving tourists a unique and compelling reason to visit London, and bringing a sense of modernity to the city

'DISCOVERY' has similar strengths for TOURISTS – motivating to both previous visitors and potential first-timers

CITY OF DISCOVERY:

London is a city that surprises at every turn. Whether it's your first visit or you're a longstanding Londoner, there is always more to discover: from the established sights and big-scale attractions to the diverse neighbourhoods, local restaurants and bars, emerging fashion and trends, or the huge range of theatre, art and music venues throughout the city.

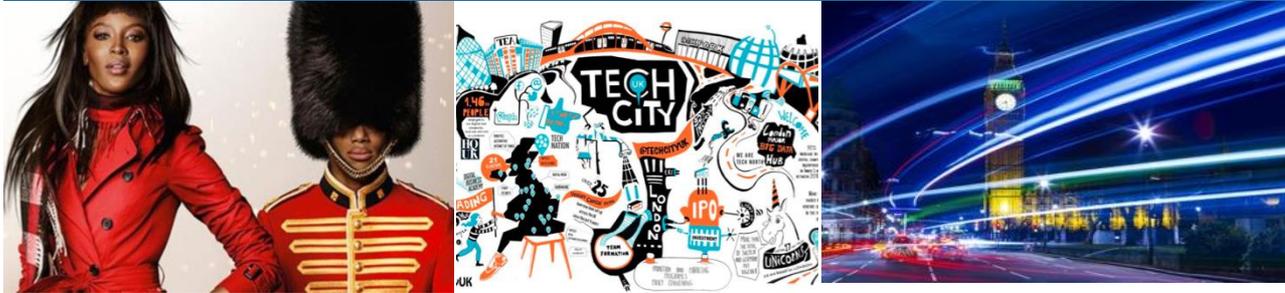


Conveys richness of experience, but lacks uniqueness to London – many cities could tell a story about getting 'under the skin' to discover more

For STUDENTS 'CREATIVE ENERGY' strongest across measures

CITY OF CREATIVE ENERGY:

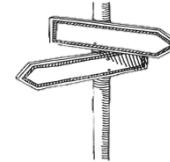
London has an exciting history as a centre for creativity and free thinking, from Shakespeare to the birth of punk and the catwalks of today. This creative energy and cultural vibrancy can be felt in every aspect of London life: food, fashion, arts, exhibitions, shops, night life as well as innovations in science and business.



Index on KPIs Students – Creative Energy



Love
106



Unique
106



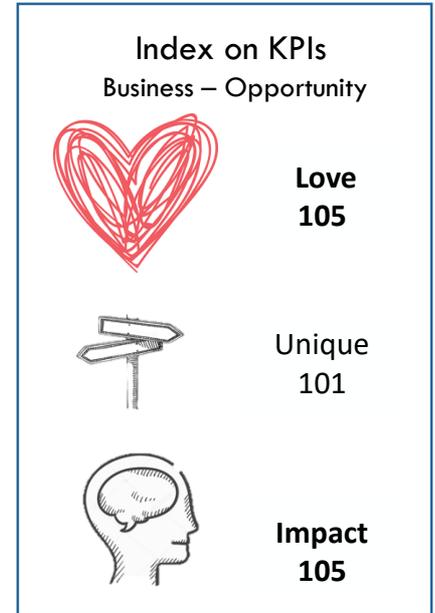
Impact
102

Creative Energy wasn't however the strongest on each individual KPI; Old & New was more appealing, and Opportunity more motivating

'OPPORTUNITY' and 'CREATIVE ENERGY' work for BUSINESS

CITY OF OPPORTUNITY:

Whether visiting, studying or building a business, London is a place where everyone can pursue their dreams. London's open, dynamic culture gives everyone the chance to be who they want to be. It provides access and connections to everything you need, to grow either personally or professionally



Less of a clear cut winner for Business audiences: Opportunity more appealing than Creative Energy, but felt less unique to London

4 of the messages stood out – albeit with different levels of appeal and impact across audiences

OLD & NEW:

The strongest message for tourists, esp first-timers; genuinely differentiates London

DISCOVERY:

Rich experiences motivate tourists; but with low impact for other audiences; and weaker on uniqueness

OPPORTUNITY:

Motivating story of personal and professional growth for business and students; but very low appeal and impact for tourists

CREATIVE ENERGY:

Vision of a dynamic, innovative city has consistent appeal and impact across all audience types; and scores well for uniqueness

Creative Energy had appeal, uniqueness and impact for all 3 audiences; but the other messages scored higher with specific audience types

'CREATIVE ENERGY' and 'OLD AND NEW' both work to update perceptions of London whilst building on its history

BEFORE: rigid, hierarchical and traditional

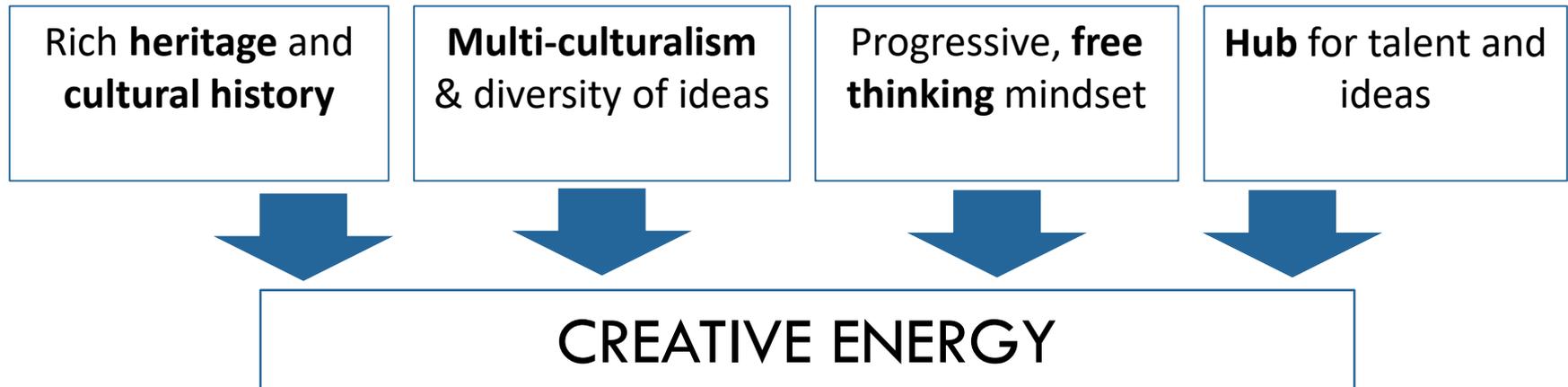


AFTER: modern, dynamic and progressive



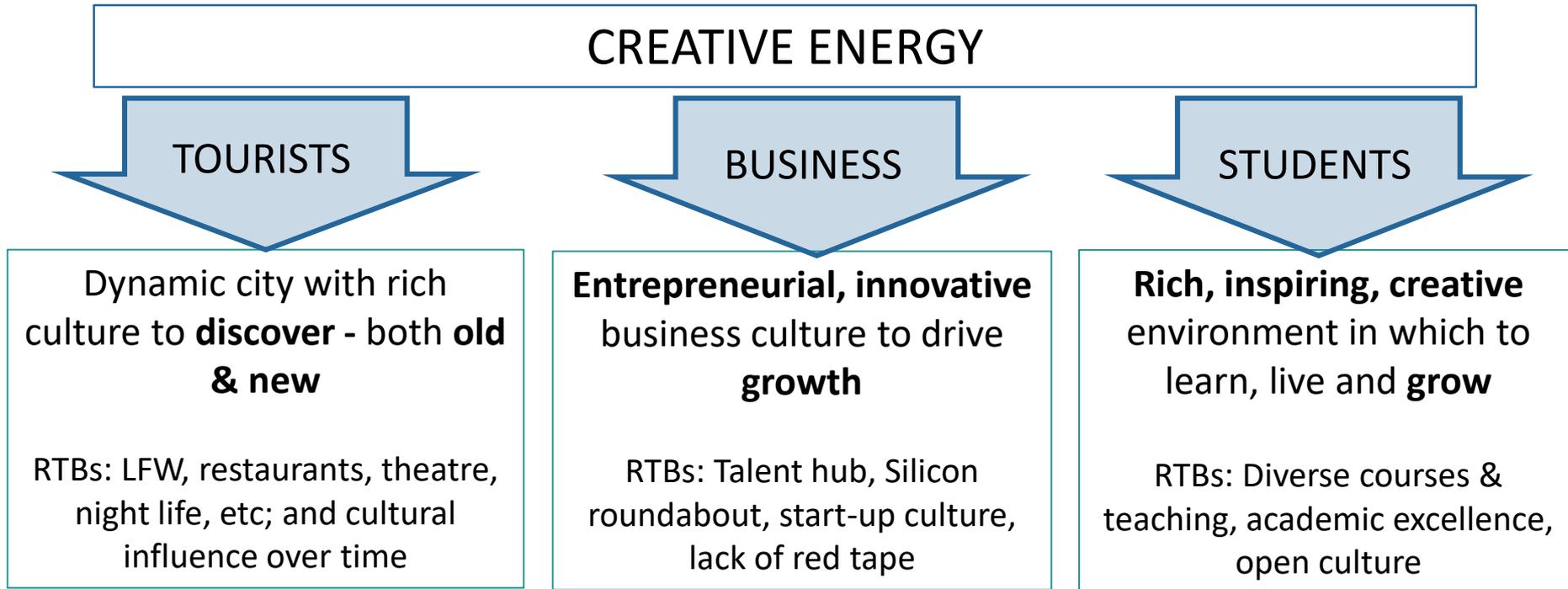
Both offer the chance to update the view of London for more distant targets – building on London's timeless values and strengths

There is overlap between many of the ideas;
'CREATIVE ENERGY' in particular is a broad territory with a range of values
and ideas that act as 'inputs'



London's Creative Energy builds on many of the attributes and values that showed strength in other messages

And the benefits of 'CREATIVE ENERGY' create a compelling story for each of our target audiences, capturing elements of the other preferred messages



There were also some messages and ideas that worked less well: care should be taken before using these explicitly as headline messaging



Claims of being NUMBER 1 provoked negative responses



How on earth can they say they are number 1?? If they want us to go back they need to be more humble about things – especially when comparing it to a country like our own. I mean, it is us Parisians who have the reputation for being arrogant!

Paris, Cool, Business

Only business audiences were somewhat motivated by a WORLD LEADER message but it needs to be carefully contextualised (e.g. best in a field)



Explicit SAFETY messages risked raising anxiety not reassurance

Less effective at communicating safety

“London is one of the safest big cities in the world”



Image ref: GLA website

More effective at communicating safety

Implied safety – worry free, relaxed, happy lives



Safety is a ‘hygiene factor’ for a city: people want to know it is *not unsafe*, but this is best conveyed through imagery of life as normal

We did not explicitly set out to test sentiment around Brexit – and although we did get some spontaneous discussion it was surprisingly less top of mind than we expected

“

I wasn't really thinking about [Brexit] but when you said 'continues to welcome' I suddenly realised that Brexit might mean that's not the case...

Leeds, Warm

Low awareness/understanding of Brexit outside Europe

In France, knowledge that London voted Remain garners sympathy

So highlighting risks of Brexit in messages can be counter-productive



Focusing on enduring, unchanging values of the city seems to be the best response to Brexit

Talking about DIVERSITY also risks being misconstrued

SAYING IT – feels top down and politicised



SHOWING IT – feels more relevant and 'open'



Multi-culturalism is an important value, but lacks impact as a standalone message – more effective as a support to a wider story

SUMMARY

Four stronger messages, though differing by audience types:

Old & New and Discovery:

- strongest for tourists
- Old & New highlights unique qualities of London, and upweights modernity
- Discovery conveys the richness of experience in a compelling but less unique way

Opportunity:

- A motivating story of personal and professional growth for business and student audiences; but does suffer from lack of differentiation vs other cities

Creative Energy:

- The message with broadest cross-audience appeal and impact
- A broader territory with potential as an overarching story that brings in elements of the other strong messages



SUMMARY

Other key take-outs from the research:

- Imply **safety** through images of everyday life; rather than messages that tackle the issue head on, and risk highlighting concerns
- **Brexit** is best addressed with enduring London values that will survive change; as with safety, explicit mentions tend to highlight the issue rather than reassure
- **'World Leader'** messaging needs to be contextualised in a specific field; simply talking about London as 'Number 1' prompts a negative response
- Show images of **diversity** but don't say it; better that it is part of a broader message than a singular, narrow focus



Appendix

In qual and quant, we saw some differences in prevailing attitudes/beliefs towards London across our 5 markets



- Low knowledge of London
- Consequently a dated, Downton Abbey vision of the city
- And some anxiety about acceptance



- London seen as *the* alternative to Paris
- A positive view of London's open, liberal attitude versus rigid Parisian culture



- Almost see London as an extension of the USA, not exotic
- Significantly more focused on safety issues than other markets



- Greater sense that London is the archetypal ideal city, most positive by far
- Quality of life was a particular focus of the discussion



- Knowledge of London can feed cynicism about 'glossy' portrayals
- But also a lot of pride about London's world-leading status

There are 'guardrails' to consider when thinking about or expressing Creative Energy:

At an overarching message level it's important to keep 'creative' and 'energy' together

- ⦿ Creative on it's own can feel too 'artsy' and niche; whilst energy is too generic

Keep explicit reference to innovation in science and business

- ⦿ Broadens the perceived relevance of this energy beyond a 'creative industries' message

Tangible examples of Creative Energy help bring this idea to life

- ⦿ As an abstract concept it can struggle to engage
- ⦿ Needs audience-relevant examples to give it credibility and immediacy

Capture the timeless nature of this quality of London

- ⦿ Giving examples over time, and capturing the interplay of history and modernity
- ⦿ Reinforces the intransience of the idea - important at a time of flux
- ⦿ Makes it distinctive to London and conveys the appealing 'old and new' nature of the city