

Committee(s)	Dated:
Public Relations and Economic Development Sub Committee – For Decision	14 December 2017
Policy and Resources Committee – For Information	18 January 2017
Finance Committee – For Information	20.02.18
Subject: Key Messaging For London: 2017 and Beyond	Public
Report of: Director of Communications	For Decision
Report author: Bob Roberts, Director of Communications	

Summary

In July 2017 we were offered the opportunity to test and develop key messages we use about London to overseas markets alongside the GLA and London & Partners.

The research involved interviewing almost 4,000 people across India, China, USA, France and the UK in three target audiences: tourists, students and business decision-makers.

It found for all three audiences the most effective message in making audiences want to visit, study or invest in the capital was one which captured the idea of London as a city of innovation, creativity and energy.

Details are in the report.

The cost of the project was £150k split three ways between the GLA, London & Partners and the City of London Corporation.

A short debrief debrief of the research project is attached as Appendix A

Recommendations

Members of the Public Relations and Economic Development Sub Committee are asked to:

- Recommend to the Policy and Resources Committee that the recommendation that City Corporation uses the strongest messages found by the research in all our communications.

Members of the Finance Committee are asked to:

- Note the report.

Main Report

Background

1. Recent events have challenged the way that we, the Mayor of London and London & Partners promote the capital.
2. For the first time in many years London can no longer take it for granted that we have a global reputation as a diverse, welcoming, safe and aspirational city.
3. Therefore it was felt by all three organisations there was a need to understand which key messages about London resonate with our key international and domestic audiences, persuading them that London is one of the best cities in the world.
4. This was also a valuable opportunity for the City of London Corporation to work closely with the GLA on a project of importance to the London Mayor.
5. Humankind Research were appointed to test top level, over-arching messages about London that cut across different geographic markets and three different audiences: tourists, students and business decision-makers.
6. They conducted a three-stage process of research:
 - Senior officers from London and Partners, GLA and City of London Corporation combined approximately 50 different messages and 40 positive values about London from across our organisations into 12 one-sentence messages.
 - These messages were explored in depth with 120 people in focus groups in New York, Shanghai, Paris, Leeds, London and Mumbai.
 - The eight strongest messages were tested in a survey with 3,776 respondents in India, China, USA, France and the UK.

Findings

7. The three most important values in an ideal city were safety, welcome and attractiveness. However these could be seen as 'hygiene factors', if a city lacks these it does not get considered but they do not actively bring people to a city.
8. London is not seen as unsafe or unwelcoming. However explicit messaging (pictures of heavily armed police or intense security measures) on either can be counter-productive. The research found safety is a message best addressed implicitly, by showing examples of everyday life being lived without worry (children in a park).
9. London was also strongly associated with the values of culture and history but for those who do not know it well that can often be seen to lack dynamism or modernity (Downton Abbey clichés).

10. Messages which portrayed London as “number one” or “the best city in the world” unsurprisingly caused resentment and a negative reaction.
11. Three messages were found to be effective with some audience types but not all audiences

a) LONDON: 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.

For a business audience, conveys the chance for growth and development in a dynamic, open-minded city, but growth happens over time – so the idea lacks impact for tourists.

b) LONDON: 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.

This differentiated London from other cities was motivating for tourists but lacks relevance for business and student audiences.

c) LONDON: 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.

This conveys the richness of London culture for visitors but lacks relevance for business and student audiences.

12. The strongest message which appealed to all audiences was the one which captured the richness, dynamism and variety of the city and brings a more progressive, modern side to London for those less familiar with the city.

This was:

LONDON: 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.

13. According to the research, it was stronger for many reasons:
 - Creative Energy has a timeless quality; it has always been a factor in London's success and growth. As such it is a value inherent in the city and true for centuries; rather than something more transient which could be threatened by Brexit.
 - It also feels credible and ownable; few cities are spontaneously seen as more aligned to this message than London; and there are a vast range of evidence/symbols that could be used to support the story.
 - It reminds people of the excitement and range of experiences available, capturing some of the strengths of the other three stronger messages.
14. For business, it captured what was seen as an entrepreneurial and innovative environment and access to ideas, inspiration and connections. Examples: the access to talent in London, silicon roundabout, the start-up culture and the lack of red tape.
 - a) The research company stressed there were caveats in using the messaging. They were:
 - It's important to keep 'creative' and 'energy' together: creative on its own can risk being too 'artsy'
 - Messaging needs to make explicit reference to innovation in science and business: to counter ideas that this is a 'creative industries' message and broaden the perceived reach of this energy.
 - Messaging should use examples of London's creative energy over time, and capturing the interplay of history and modernity to reinforce the longevity of the idea. This is what makes it distinctive to London
 - b) There were market differences in the way audiences reacted to the messages.
 - Creative Energy plays out particularly well in China, especially amongst students; and in London itself, where it felt like it captured the atmosphere of the city in a unique and appealing way.
 - The most notable difference was that audiences in India were keener to hear the Quality of Life and Warm Welcomes messages;

15. Members are asked to:

Support the recommendation that we use the strongest messages found by the research in all our communications.

Appendix: Integrated Quantative and Qualitative Debrief from Humankind Research

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