



CITY INFORMATION CENTRE



Annual Report
2012—2013

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INTRODUCTION

The City of London Corporation has served London, the nation and its international visitor communities through its City Information Centre (CIC) at St Paul's for over 50 years.

Recently becoming the only official tourist information centre in central London, the Centre has welcomed over 2 million visitors through its doors since it reopened in new, purpose-built premises in November 2007.

Throughout its existence, it has delivered a superlative, multi-lingual, face-to-face service, providing advice and information to visitors, workers and residents, promoting the Square Mile and London more widely as a vibrant and dynamic destination and, since early 2012, driving footfall to places of interest across the country through by virtue of its partnership with VisitEngland.

1. Key achievements 2012/13

Two thousand and twelve was an extraordinary year for the whole country, not least for the City of London. With the Games on our doorstep and the Diamond Jubilee celebrations across London, the City Information Centre (CIC) rose to embrace this once-in-a-lifetime opportunity to showcase the City to the world and sell London across the globe. Some of our greatest achievements during this period included:

- a **formal partnership agreement with VisitEngland** that positioned the CIC as the agency's official Tourist Information Centre (TIC) in London over the Games
- the **extension of the above agreement for three years**, securing the benefits of mutual promotion until December 2016
- the introduction of **sales and promotions around national product** as a result of the above, adding significant value to our service for all our customers
- the **delivery of a training programme for the GLA's Ambassadors** focussing on London product knowledge in the summers of 2012 and 2013; the use of CIC to do this highlighting the good regard and expertise it has in the field
- our adoption of **the London wide TIC network** following the Games and our facilitation of regular meetings and information exchange between partners, further positioning us as London's leading TIC
- the **learning of Chinese and Portuguese** as part of a programme to ensure CIC staff are able to offer the fullest welcome to the ever-burgeoning visitor audiences arriving from the BRIC countries
- the acquisition of **a mobile van to promote the City and provide visitor information** at major City events (enabling us to engage with more customers in different parts of the Square Mile) and for deployment at events outside the City (eg on Hampstead Heath)
- the introduction of an **internship programme for a London tourism graduate** to spend 6 weeks at the CIC and with the Visitor Development Team at Guildhall (to be offered twice yearly)
- the **introduction of new product lines** including hotel bookings, the Touring National Pass and Hudson Explorer as well as tickets to major new attractions
- **recognition of the CIC team at the City of London's Learning & Development Awards** which acknowledged their efforts in acquiring new knowledge for the 2012 Games

- our score and placement in the 2012 **VisitEngland National Mystery Shopper Rankings** which saw the CIC scoring 93.7% (up by 16% on 2011 results) and being positioned first in London (moving from 4th place in 2011) and 45th nationally (moving from 206th place)
- a **record-breaking year**, with footfall up 1.8% year-on-year (399,899 visitors) despite the Olympic displacement factor and sales revenue the highest since opening in 2007 (£433,420 in revenues, generating £70,706 profit equates to growth of 26.3% and 16.8% year-on-year respectively)
- the serving of our **2 millionth customer** since opening in 2007
- 70% of CIC customers scoring the information they received as excellent (up 13% on the previous year) and 66% scoring the service offered by staff as excellent (up 3%) in **the CIC Annual User Survey**¹; in addition, overall satisfaction went up from 93% to 95% and the role the CIC has played in enhancing a visit to London increased to 95% in 2012 compared to 73% over previous years

¹ RJS Associates, summer 2012

2. Footfall

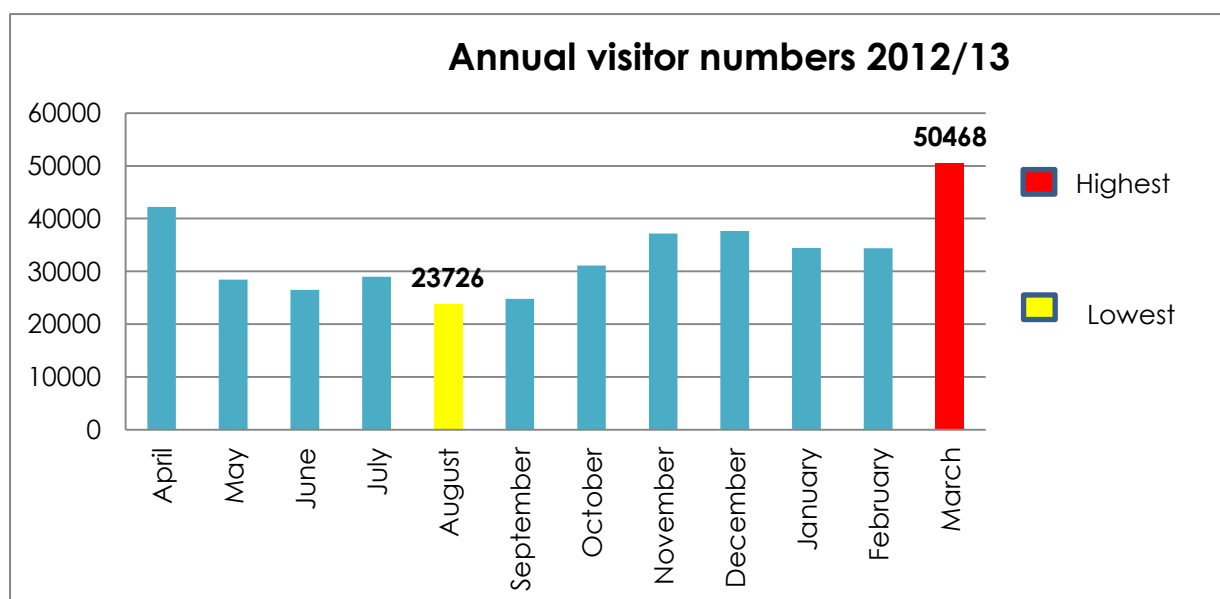
2.1 April 2012 – March 2013

2012/13 saw another very busy year for the (CIC) with 399,899 visitors coming through its doors. This was despite an unusually wet summer, the coldest March for 50 years and the Olympic displacement factor. **The total footfall figure is the highest annual figure the CIC has ever achieved.**

There were a number of events which attracted these higher visitor numbers. They are fairly similar to those that caused last year's peaks and include the half term holidays, the Lord Mayor's Show, the Easter break and the festive period between Christmas and New Year.

While 2012 will go down in history as a one-in-a-lifetime opportunity for tourism (Diamond Jubilee, Olympic and Paralympic Games), these events did not have the impact that was anticipated. Visitors tended to avoid central London during the Games, resulting in August 2012 having the lowest visitor totals since our records began. This is the case despite the Centre extending its opening hours (08:00 to 20:00) over the Olympic period. The additional 4 hours a day brought only 3743 additional visitors into the Centre in total.

As part of English Tourism Week, the CIC extended its opening hours again (until 18:30 from 18 to 22 March), with free guided walks leaving from the building at 17:45. Although the walks generated interest and footfall during the week, the extended opening hours brought only 139 visitors to the CIC over the 5-day period. This disappointing response (as well as the low footfall during the extensions at Games time) suggests that our existing hours of operation are about right and that, at the present time, there is no real need to review them.



2.2 Monthly footfall. 2011/12 and 2012/13

Month	April 2011 - March 2012	April 2012 - March 2013	Comparison %
April	25364	42203	39.9
May	23346	28414	17.8
June	28188	26479	-6.5
July	30481	28993	-5.1
August	38244	23726	-61.2
September	26395	24798	-6.4
October	36651	31137	-17.7
November	35968	37190	3.3
December	43013	37636	-14.3
January	39046	34440	-13.4
February	36633	34415	-6.4
March	29435	50468	41.7
Total	392764	399899	1.8

Visitor numbers for 2012/13 have shown similar seasonal trends to those in 2011/2012 with peaks during half term holidays, the Christmas period and the Lord Mayor's Show.

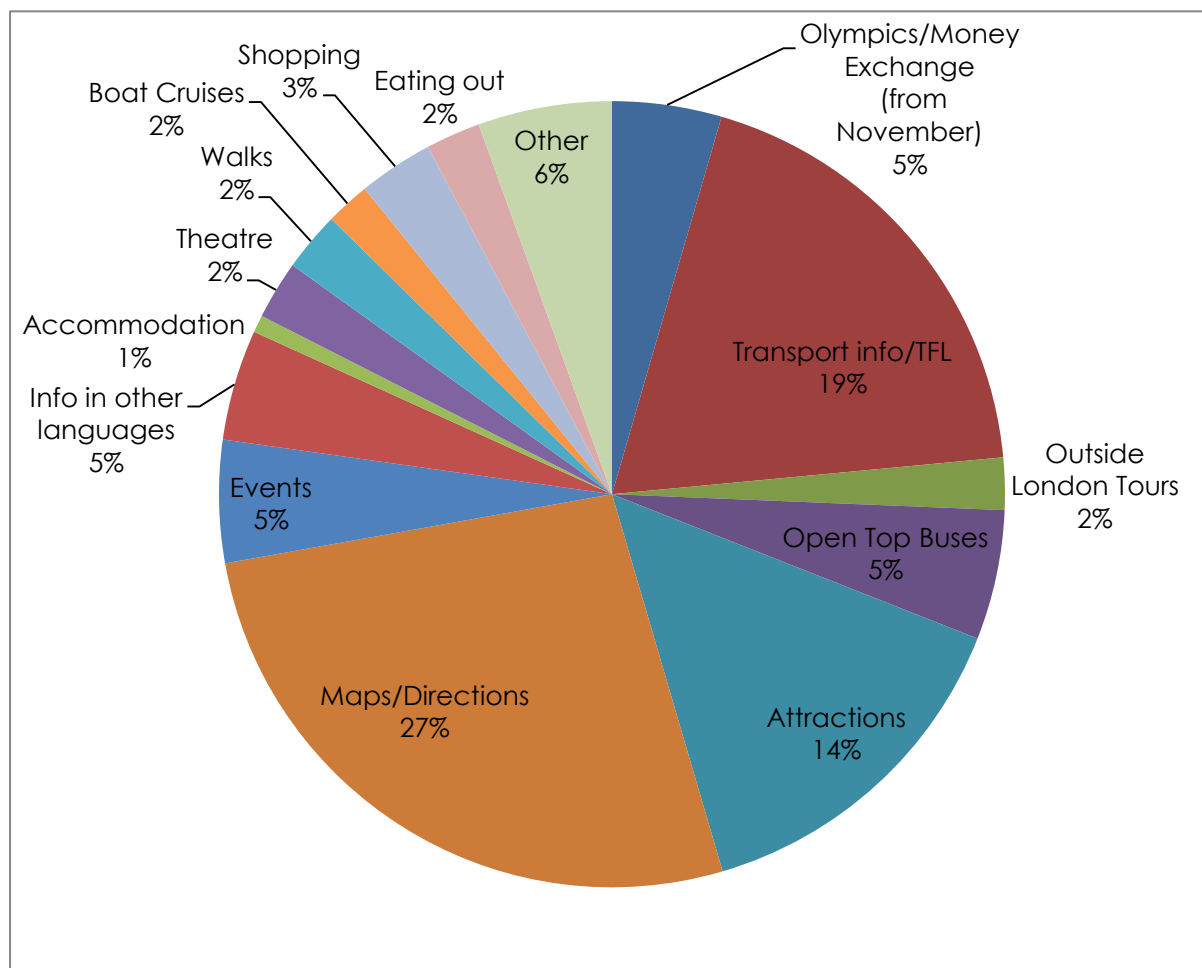
The start of the financial year was very busy with the third busiest April on record and the busiest May since 2008. From June onwards visitor totals started to decrease. This can be attributed to a summer of major events (Diamond Jubilee, Olympics and Paralympics) and the displacement they caused on London's footfall overall.

London has been quick to recover however and March 2013 saw 50,468 visitors come through the Centre's doors. This is the busiest month the Centre has ever seen by a very considerable margin.

Overall, and despite the poor figures during the summer months, footfall at the City of London Information Centre was up 1.8% compared to the previous financial year (2011/12).

3. Enquiries

The range of enquiries over the past year is shown below.



Enquiries about directions and maps were by far the most common in 2012/2013, representing nearly a third of all enquiries. This was closely followed by advice about transport and attractions. In total, these three categories accounted for 60% of the total number of enquiries in 2012/13, (12% less than 2011/12).

That these enquiries focus on getting around London and its visitor product provides some testament to the significant role the Centre plays in driving footfall across the capital and generating valuable tourism revenues. It also highlights the importance of our continued liaison with tourism stakeholders such as TfL and the City's attractions so that we can ensure that accurate and reliable information is available for our visitors.

3.1 Geographical distribution: enquiries

Enquiries	%
City	30.5
Greater London	63.2
UK	6.3
Total	100.0

Enquiries grouped by geographical distribution do not respond to seasonal variances and have remained at the proportions shown above on a monthly basis as well as for the year.

What is significant here is the proportion of London enquiries that the CIC handles, reinforcing the point made earlier regarding the value of the Centre to London's tourism economy. The lower figure for UK/national enquiries is as we would expect given that this is the first year the centre has offered information about national product.

3.2 Geographical distribution: visitors

From 1 April 2012, the CIC started recording visitors' country of origin, noting those that were Londoners (and so local to the Centre). This has improved our understanding of customers' needs – not least in their product preferences – and to respond accordingly.

The table overleaf shows the top ten CIC audiences by country of origin. Perhaps surprisingly, the UK is in first place illustrating the significant role the CIC plays in the domestic market (supporting our role in delivering services to the target audiences of our partner VisitEngland).

The UK is closely followed by France and then Spain and Germany. The USA follows in fifth place. This table is very unsurprising and reflects London's significant appeal to the short stay European market and to the US market – France, Germany and the US being the UK's largest inbound markets and its most valuable in 2012.

Of the BRIC countries, only Russia appears in the top ten; Brazil occupies 12th position with 1852, India 16th with 1284 and China 18th with 700 visitors. This is as would be expected. The BRIC countries are emerging markets and we would expect to see their numbers build in the coming years, noting cultural differences between nations in their tendency to use TICs and that the Indian market is largely focussed on Visiting Friends and Relatives (VFR).

Whilst not contributing high numbers to the annual CIC footfall, it is also worth noting that some visitors originate from countries as far as Guyana,

Cambodia, Iraq, Pakistan, Mauritius, Vietnam, Kazakhstan, Sri Lanka, Saudi Arabia and many others.

During 2012/13, the top six countries of origin remained very similar each month.

Origin	Total
UK (including Londoners)	12626
France	10248
Spain	9481
Germany	8335
USA	7865
Londoners	7421
Italy	6150
Scandinavia	3679
Russia	2434
Australia/New Zealand	1911

3.3 England: the top five enquiries

From 1 November 2012, the CIC started recording the number of enquiries about places beyond London with which it dealt. During the five months to year end, the top five remained very similar – Oxford, Stonehenge, Bath, Cambridge and Windsor. All cities are in England, while Scotland got 40 enquiries and Wales 12.

TOP FIVE	
Stonehenge	162
Oxford	155
Cambridge	98
Bath	96
Windsor	70

During the school holidays in December, the Harry Potter Tours at Warner Bros Studios became very popular, taking the fourth place in the list of enquiries for attractions outside of London that month.

3.4 Contact Centre enquiries

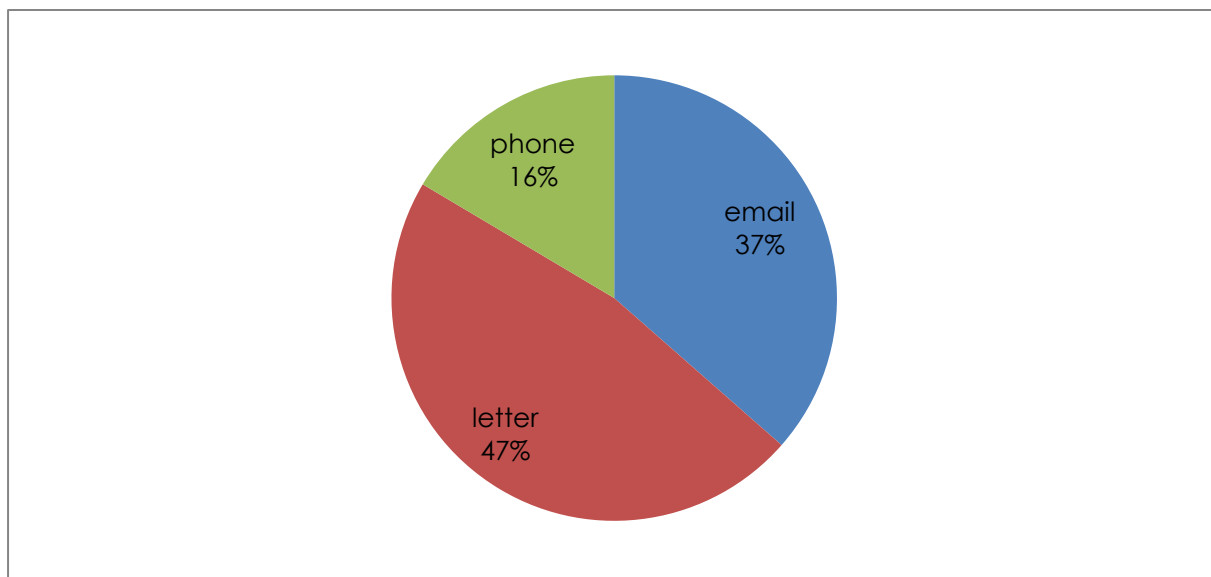
The City Corporation provides a Contact Centre to deal with phone enquiries. The Contact Centre is not a part of the Culture, Heritage and Libraries Department but, from time to time, they refer enquiries to the CIC via email or phone. These enquiries are commonly related to tickets for the Livery halls or maps and guides to be posted and can only be dealt with by the CIC

directly. On average the CIC deals with 50-70 Contact Centre queries per month.

During the 2012/13, the CIC dealt with approximately 600 Contact Centre enquiries. In reality, the true number of enquiries is likely to be slightly greater because not all queries are recorded during busy periods. Out of those 600 enquirers, 437 required maps, leaflets or brochures to be posted to them.

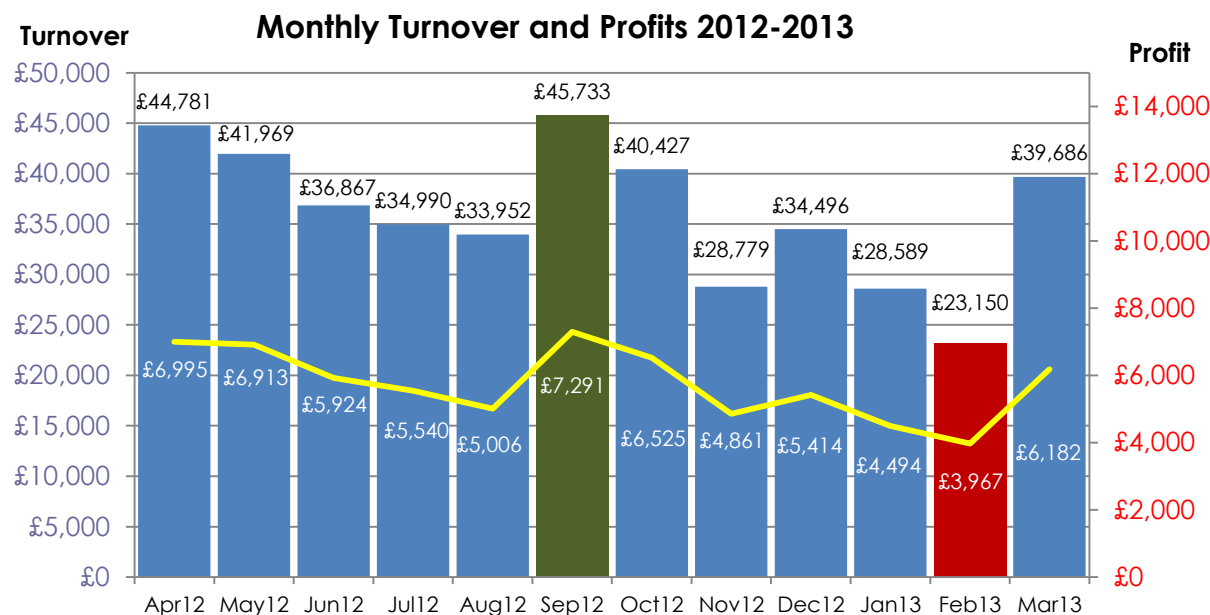
3.5 Postal, phone and email enquiries

The CIC receives many enquiries by post, email or telephone. Statistics for these are also recorded. In 2012/13, the CIC received 62 emails, 28 phone calls and 80 letters – a total of 170 enquiries. As mentioned before, the real figures are likely to be slightly higher than the recorded ones, due to the fact that some of the enquiries are not logged during busy periods. Out of 170 enquiries, 137 required information to be posted.



4. Sales and profits

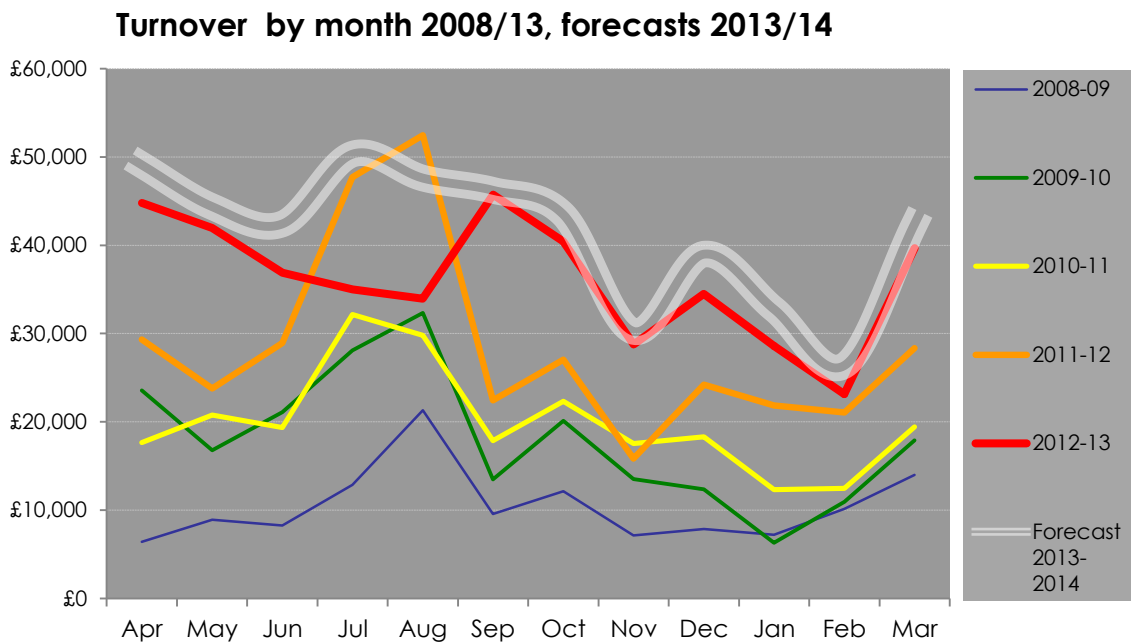
4.1 Overall sales and profits



- Sales in 2012/13 were the highest since opening; total for year = £433,420
- Profits were also the highest since opening; total for year = £69,114
- Average turnover per month = £36,118
- Average profit per month = £5,760
- In 2012/13, turnover was 26.3% higher than 2011/12 and 80.5% higher than 2010/11
- Profit was 16.6% higher than 2011/12 and 60.7% higher than 2010/11
- Unusually, the highest grossing month was September (Olympic effect June-August). This was by far the most revenue generated in any September and the 3rd highest grossing month since opening, (April 2012 was 4th highest)
- In 2012/13, the lowest sales and profits were in February

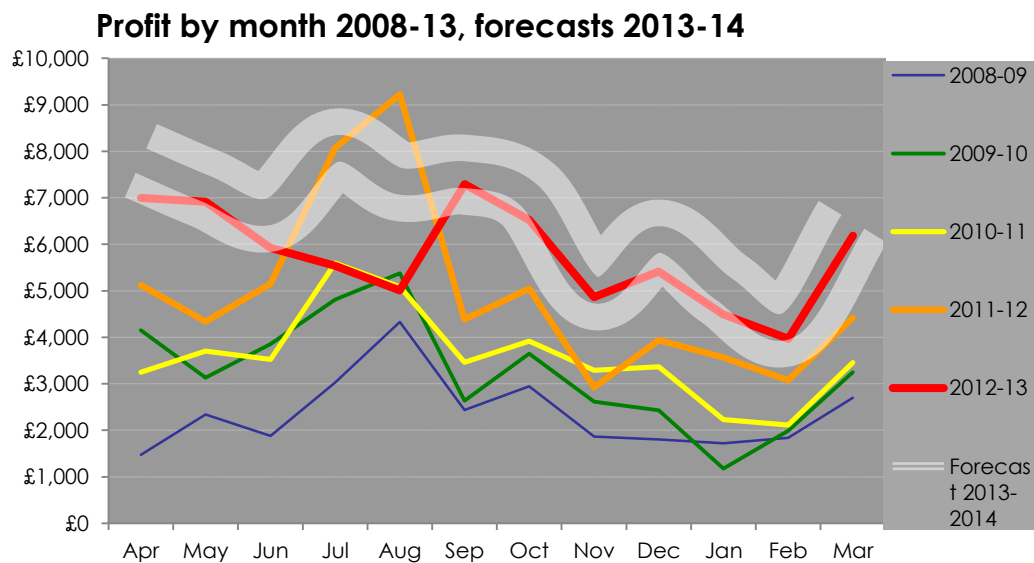
4.2 Comparisons with previous years

4.2.1 Turnover

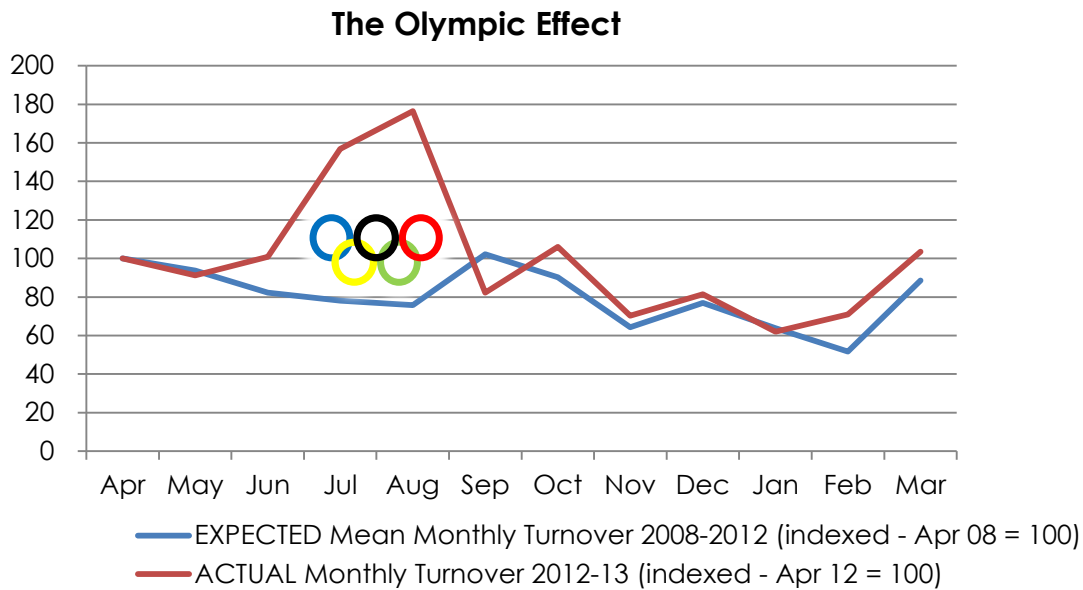


- The chart above shows clear increases in turnover over most of the year compared to previous years
 - The difference in peaks over the summer period are due to Games and Jubilee festivities taking visitors elsewhere
- The forecast for 2013/14 is based on current product lines and prices staying the same – as prices usually increase in April and there are plans for new products in 2013/14, this is a conservative estimate.

4.2.2 Profit



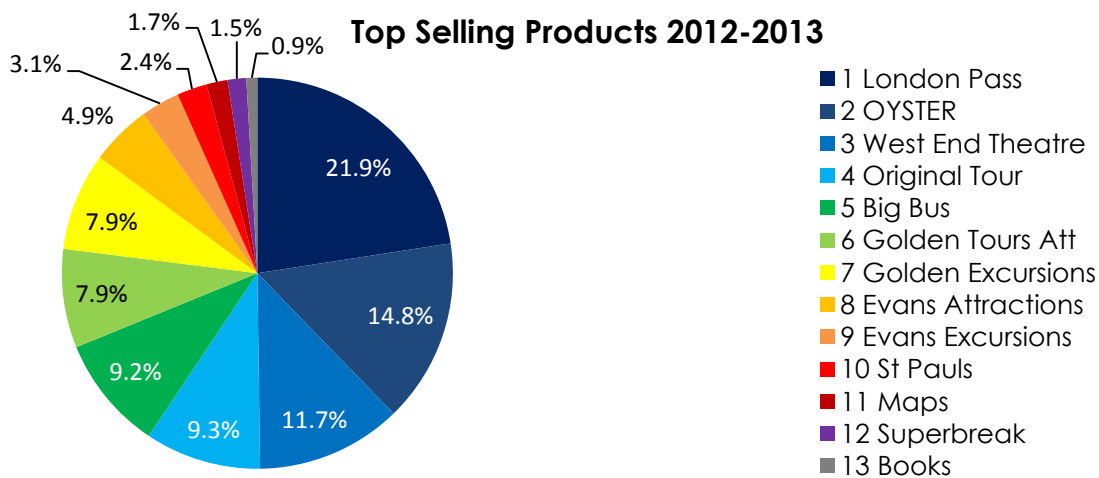
4.3 Impact of the 2012 Olympic and Paralympic Games



- The red line represents the level of expected monthly sales according to data from previous years
- The blue line represents sales achieved in 2012-2013
- Noticeable is how the lines follow one another but diverge markedly between May and September.
- This shows a decrease in sales turnover stemming from the disruption to normal activities in London caused by the 2012 Games and Diamond Jubilee.

4.4 Annual turnover and profit by product

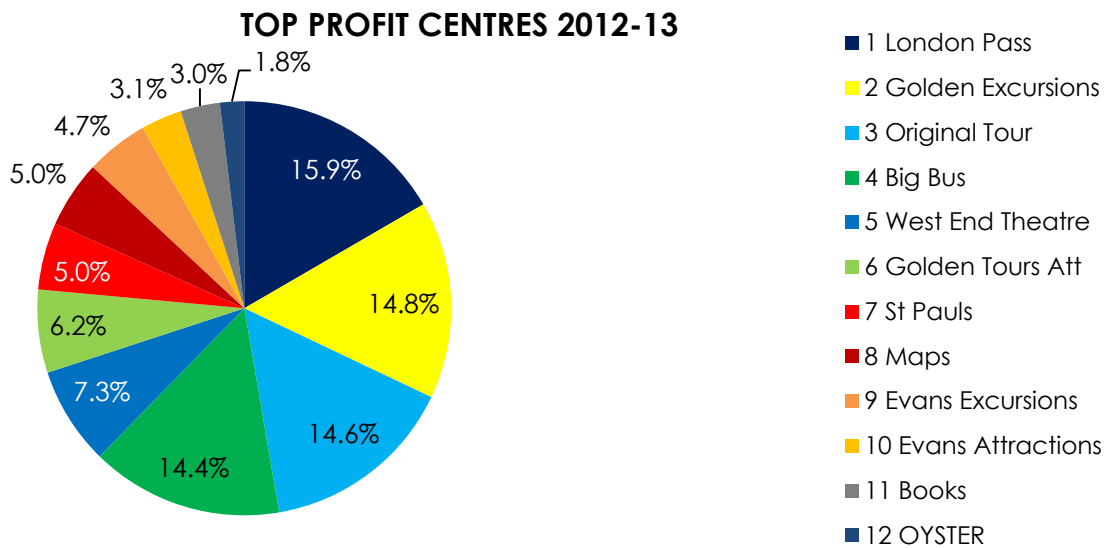
4.4.1 Highest selling products 2012-2013



- London Pass is the biggest seller, taking 21.9% of all sales.
- London Pass, together with Oyster and West End Theatre tickets account for nearly 50% of all sales over the course of the year

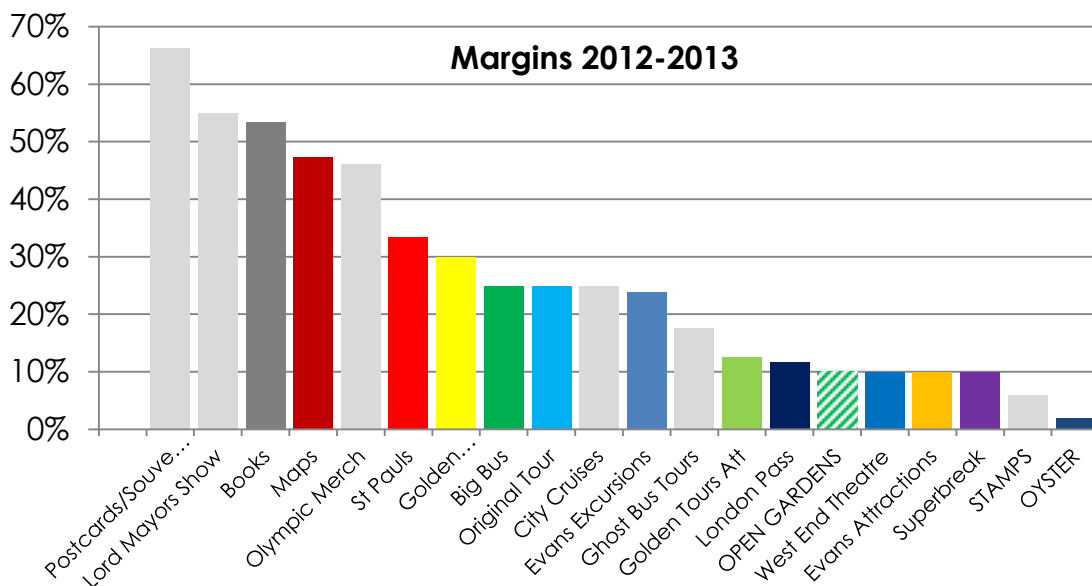
- London Bus Sightseeing tours account for 19.5% of sales
- Golden Tours account for 17% of sales, whereas Evan Evans took only 8%

4.4.2 Most profitable products 2012-2013



- London Pass accounts for highest proportion of profit overall
- London bus sightseeing tours are relatively more profitable than would be expected if margins were the same over all products
- West End Theatre's margins are somewhat less profitable than would be expected if margins were the same over all products
- Oyster profit margins are miniscule – 14.8% of sales, only 1.8% of profits
- Maps and books together have only 2.6% of sales, but 8% of profits – however per unit prices are very low (see 3.7)

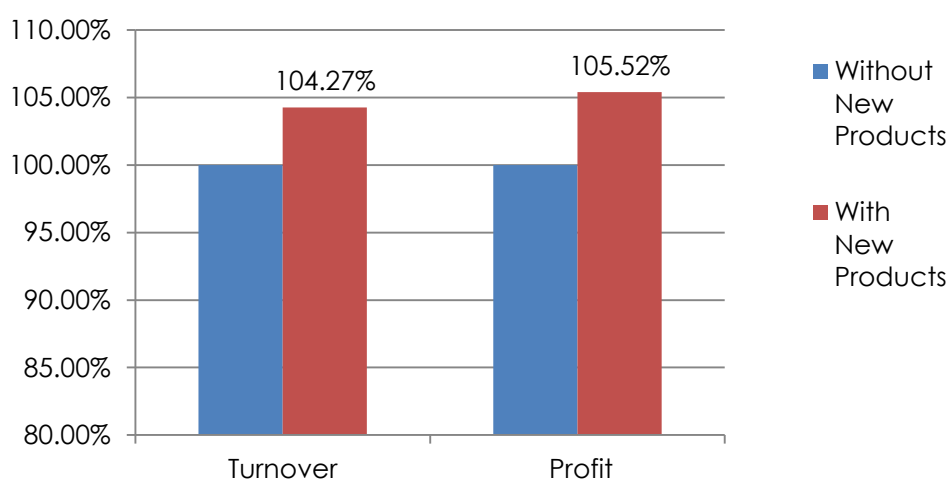
3.5 Margins 2012-2013



- This graph above compiles data from 2012/13 to show the profit margins per product group. In many cases this is set as a commission level, but in the case of books and maps it depends on the difference between the cost price and retail price
- The chart is somewhat misleading – it appears that the most profitable products per unit have been books and maps and souvenirs, but these are the lowest priced and least-sold products at CIC so do not account for such a high proportion of turnover or profit.
- Meanwhile our highest sellers (London Pass, West End Theatre, Oyster) have the lowest profit margins – with Oyster again showing why it accounts for such a small proportion of profits.

4.6 New lines

Effect of new product lines on turnover and profits



- New products introduced in 2012/13 included the Superbreak hotel booking service and an increased range of maps
- Overall, these products only increased sales by 4.3% (c.£1480 per month) but were relatively profitable, increasing profits by 5.5% (c.£300 per month)
- New lines also included Hudson's Heritage Pass and National Trust Touring Pass, with the CIC acting as sole redemption point in London for both of these products and commission paid per redemption being £1 and 20% of cost of pass respectively
- During the course of 2012/13, the CIC has begun to source products direct from suppliers and publishers, ceasing its supplier agreement with the Museum of London. This has allowed the CIC to stock a wider range of lines and product titles in line with visitor demand and interest as well as to negotiate higher commission levels
- Other new product lines introduced this financial year include: Open Gardens Squares Weekend tickets (CIC being the only sales point in London), and tickets for most of the major new attractions including the Harry Potter at Warner Bros Studios, the View from the Shard, Olympic Park tours and Climbing the O2

5. Learning & development

2012/13 has been an extremely successful year for the CIC team in all areas of learning & development and service delivery performance.

The Olympic and Paralympic Games periods and the CIC's position as the sole official tourist office in central London were pivotal in this success. All team members attended pre-Games time courses which served as a reminder of the importance of the role to be played by the CIC as an ambassador for London's cultural offer, engaging with a wide range of nationalities visiting the capital during the Games, and encouraging repeat visits in the months and years ahead.

Courses attended were **World Host Principles of Customer Service** and **Cultural Awareness: Welcoming the World**. The enthusiasm and commitment shown by the CIC team in providing a memorable Olympic and Paralympic Games visitor experience resulted in them being nominated for the City of London Corporation Team Learning & Development Award.

The past year has also seen an increase in the developing BRIC (Brazil, Russia, India, China) visitor markets to the City and the capital. Emphasis has been placed on these languages in order to ensure that the CIC adds them to its already vast array of linguistic service delivery. Russian is already spoken by one team member with basic conversation levels of **Chinese** and **Portuguese** being encouraged thanks to the facilitation of course attendance towards the latter part of 2012-13 and continuing into 2013-14.

With the closure of the Britain & London Visitor Centre in December 2011, VisitEngland recognised the gap in the promotion of the England destination product to the many visitors who wish to explore further afield. This saw the CIC and VisitEngland enter a partnership and the CIC extend its pre-existing England offer to fall in line with **VisitEngland** requirements and expectations. The team has responded extremely well in delivering this additional service through developing knowledge via team day and regular staff meeting initiatives. These have contributed to a more confident, efficient and improved experience of the CIC for its many visitors seeking England information as was recognised in the last Visitor' Survey results.

With the CIC team managing the many demands and expectations placed on it in the year, 2012/13 also saw an award of 1st place in the VisitEngland regional mystery shopper initiative. Targets for 2012/13 performance in the CIC-organised exit survey were also reached and exceeded.