



# City Information Centre User Survey 2013

Prepared for: City of London Corporation  
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# Summary and conclusions

- The user survey at the City Information Centre (CIC) has been undertaken for a number of years – generally in early summer. In 2013 interviewing took place in between 9<sup>th</sup> and 28<sup>th</sup> July.

## Visitor Characteristics

- In 2013, visitors from Europe were the largest group using the CIC – over half of visitors. The proportion of users from the short haul European market was up on previous years while the proportion of UK users was lower in 2013 - accounting for only 15% of visitors.
- The age profile of visitors was similar to previous years with visitors from all age groups. The commonest group was 25-34.
- In 2013, CIC users were most likely to be staying in an apartment or house. This was an increase on previous years possibly reflecting an increase in the availability of people letting out their homes privately via websites

## Pre-Arrival

- Most CIC users (73%) knew they were in the City of London, the proportion was lower than previous years (but higher than 2012).
- Four fifths (78%) of CIC users had planned their visit to the City in advance .

- The primary reason, among CIC users, for visiting the City was sightseeing or going to an attraction. This was similar to previous.
- The role of a tour bus and /or shopping in bringing visitors in saw an increase in 2013.
- The majority (76%) of CIC visitors had not used the centre previously. This was broadly the same as previous years.
- Typically users found out about the CIC when passing by – but this was a lower proportion than in previous years. Guidebooks and websites (including [visitthecity.co.uk](http://visitthecity.co.uk)) were more important in 2013.

## Information usage at CIC

- The proportion of users noticing the screens, both inside and outside, the centre was up significantly on previous years – nearly all users had noticed the screens inside the centre.
- The majority of visitors to CIC had got a map on London and information on places to visit in the City. These were both up on previous years.
- In 2013, 83% of users noticed information about other destinations in England. This was up on 2012 (when it was 49%).

# Summary and conclusions

- About two fifth of users who had looked at England information were using it to help make plans for either their current trip or a future trip.
- Just over half (54%) of CIC users were aware of the free wi-fi but usage was very low (about 2%).
- The majority of CIC users (63%) had picked up the leaflet on the City Visitor Trail – but none had downloaded it.
- In 2013, there was a dramatic increase in the proportion of users highlighting that their CIC visit had persuaded them to stay longer – 39% highlighting it had 'greatly' influenced them (compared to 8% in 2012)
- Satisfaction with aspects of CIC performance was generally higher among repeat visitors, and over 55 year olds.

## Satisfaction and potential influence

- Ratings of the quality of information and staff remained very high – a 100% of respondents rated them as good or excellent. The proportion of 'excellents' was up slightly on previous years.
- Overall satisfaction with CIC was also very high – in 2013, an average score of 9.4 out of 10 showed a slight increase on previous years.
- In addition, users would be very likely to recommend CIC to others - an average of 9.4 out of 10.
- The CIC had enhanced a visitor's trip to London - this continued the pattern of 2012 – i.e. a significant increase over previous years.
- The CIC is playing a role in prompting revisits to the City for 25% of users - a higher level than previous years.

## Visits to Attractions

- The top places of interest were St. Paul's, the Tower of London, Tate Modern, Tower Bridge and London Eye.
- Two thirds of CIC users were visiting an attraction in the City on the day of their visit (to the CIC).
- Approximately half (55%) of CIC users were also planning to re-visit the City over the next week to visit an attraction.

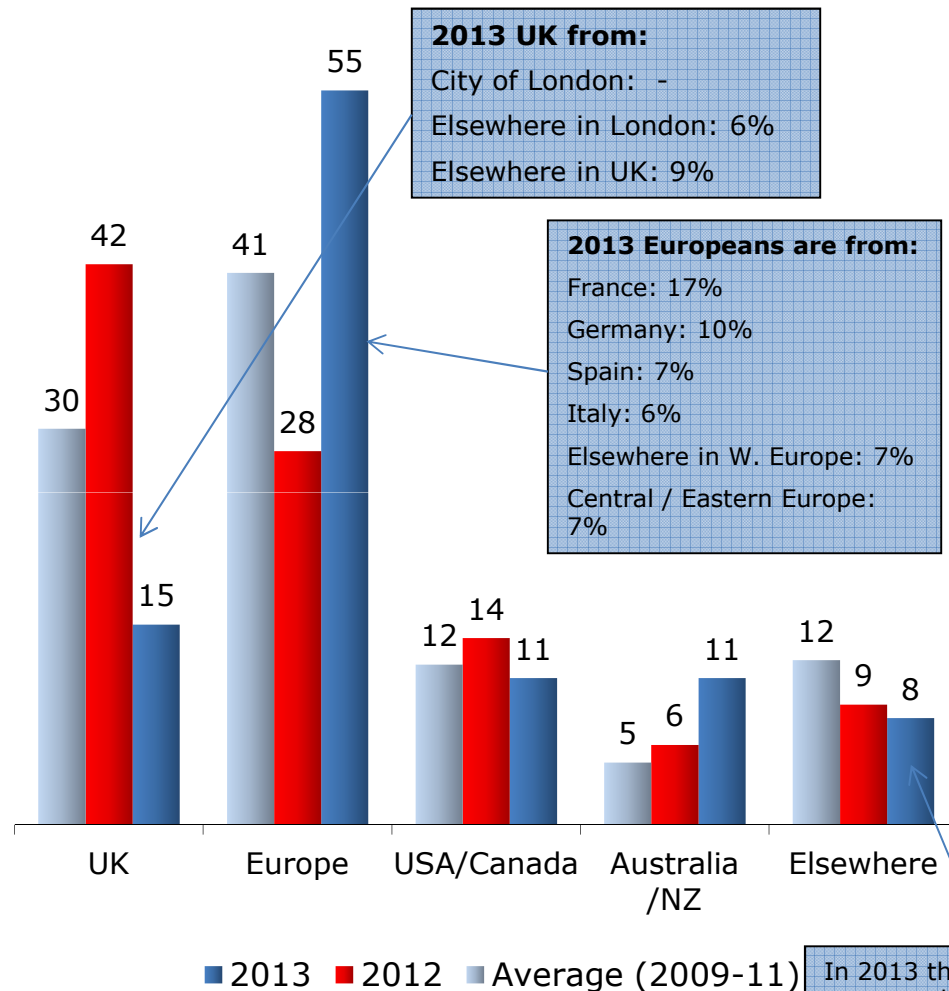
# **INTRODUCTION**

# Introduction and Methodology

- This report provides a summary of the key results of a survey of visitors to the City of London Information Centre (CIC). It was commissioned by the City of London Corporation. The survey followed a similar approach to those undertaken in previous years.
- The survey was conducted between 9<sup>th</sup> and 28<sup>th</sup> July 2013. This timing was similar to previous years.
- The total sample was 218 visitors to the CIC.
- The user survey was conducted on a face-to-face basis as visitors exited the CIC.
- Self completion questionnaires were available in French, German, Spanish and Italian – 9% of questionnaires were completed using one of these language versions.
- Interviews were split between weekdays (50%) and weekends (50%).
- Within this report comparisons are made to previous surveys where appropriate. In some cases, data from multiple survey years has been merged – this was to increase sample sizes and therefore reliability.
- Previous surveys used a similar methodology but with samples of:
  - 258 in May/June 2006
  - 381 in August/September 2008
  - 213 in June 2009
  - 222 in July 2010
  - 242 in July 2011
  - 441 in 2012 – 222 in July phase, and 219 in August (during the Olympics).

# **VISITOR CHARACTERISTICS**

# In summer 2013 visitors from Europe were the largest group using the CIC – over half of visitors.



**2013 UK from:**  
 City of London: -  
 Elsewhere in London: 6%  
 Elsewhere in UK: 9%

**2013 Europeans are from:**  
 France: 17%  
 Germany: 10%  
 Spain: 7%  
 Italy: 6%  
 Elsewhere in W. Europe: 7%  
 Central / Eastern Europe: 7%

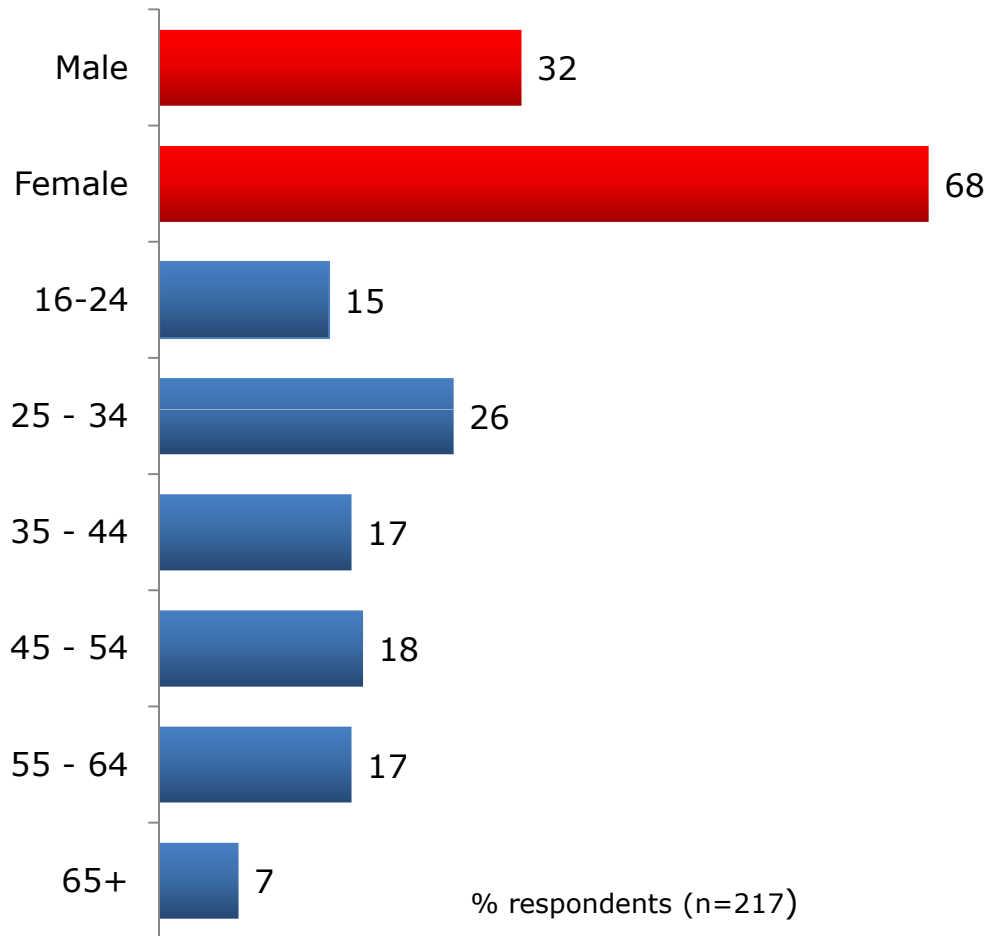
In 2013 the **BRIC** counties accounted for less than 1% of visitors.  
 Japan accounted for 6% of visitors in 2013

The overall pattern differs from the **previous few years**, particularly 2012.

- UK users were significantly lower in 2013 accounting for only 15% of visitors. This compared to 42% of visitors in 2012 (which was a significant year for UK visits) and 30% in previous years.
- There was a higher proportion of users from the short haul European market than previous years. The French market was noticeably up in 2013 – 17% of visits compared to an average of 8% (2009-11). Germany and Italy were also up.
- Other markets that were up on previous years included Australia/New Zealand, Central/Eastern Europe (7% compared to 3% in 2009-11) and Japan (6% compared to 1% in 2009-11).
- This pattern is partly reflected in IPS data (at June 2013) which highlights increases in visitor levels from a number of countries including: France (9%), Germany (8%), Australia (10%), Czech Republic (19%), Poland (11%). (figures are year to date changes). Japan was static.

Question = 'Where do you live?'  
 Sample = all respondents (in 2013 n=218)

# CIC visitors are from all age groups. The commonest in 2013 was 25 to 34 years.



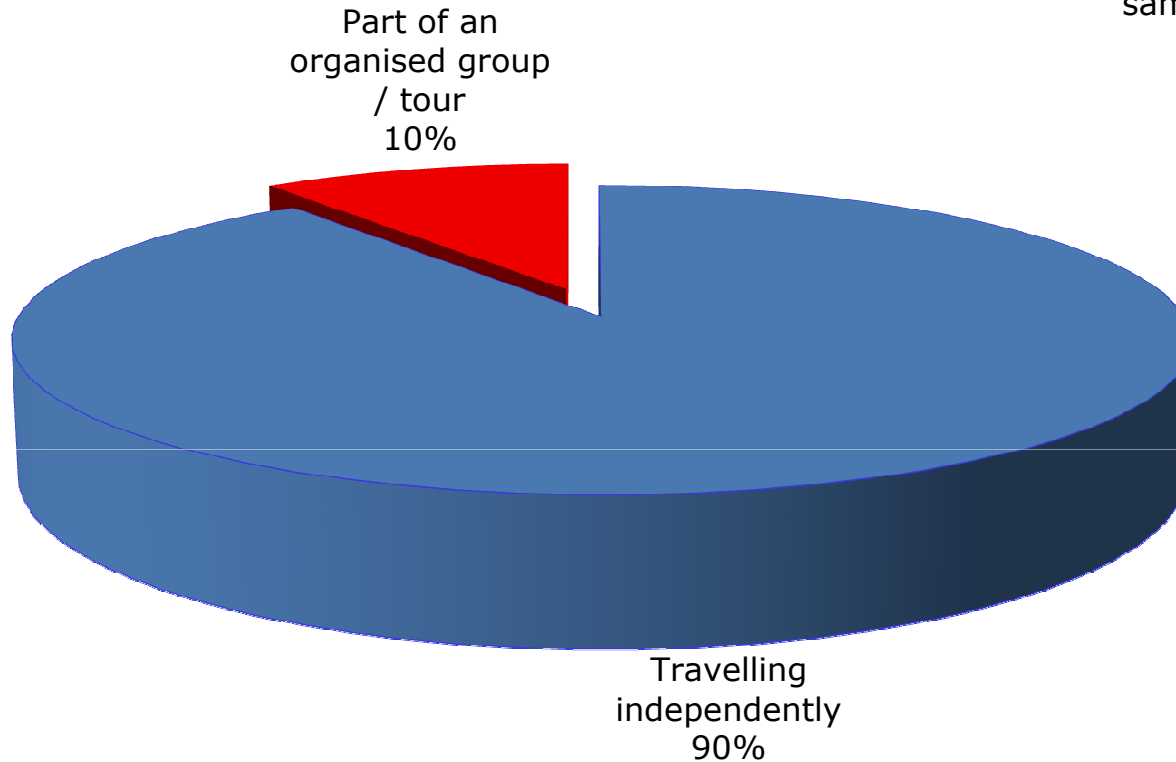
- Overall, the visitor profile, in terms of age, was broadly the same as previous years. In 2013 there was a greater bias to female visitors – 68% compared to 55% in previous years\*.

\* Based on data from 2009, 2010, 2011 and 2012 surveys.



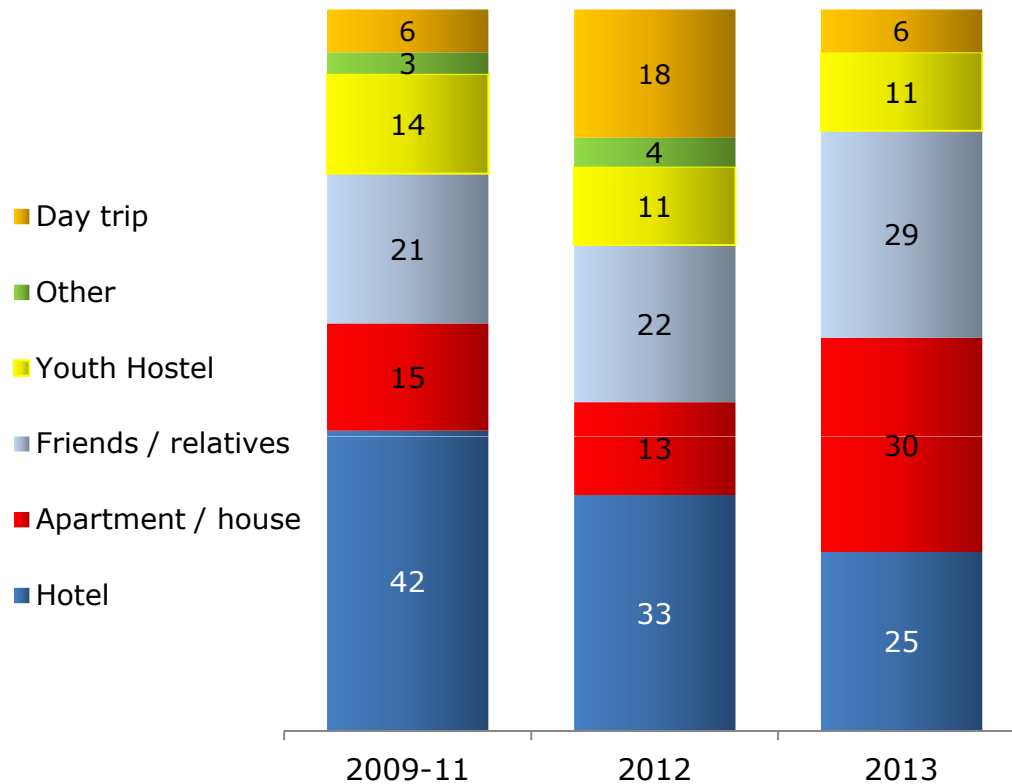
# CIC users were typically travelling independently.

- The pattern was broadly the same as previous years.



Question = 'Are you travelling independently or as part of an organised group or tour?'  
Sample: excludes residents of London (in 2013 N=202)

## In 2013, CIC users<sup>1</sup> were most likely to be staying in an apartment or house.



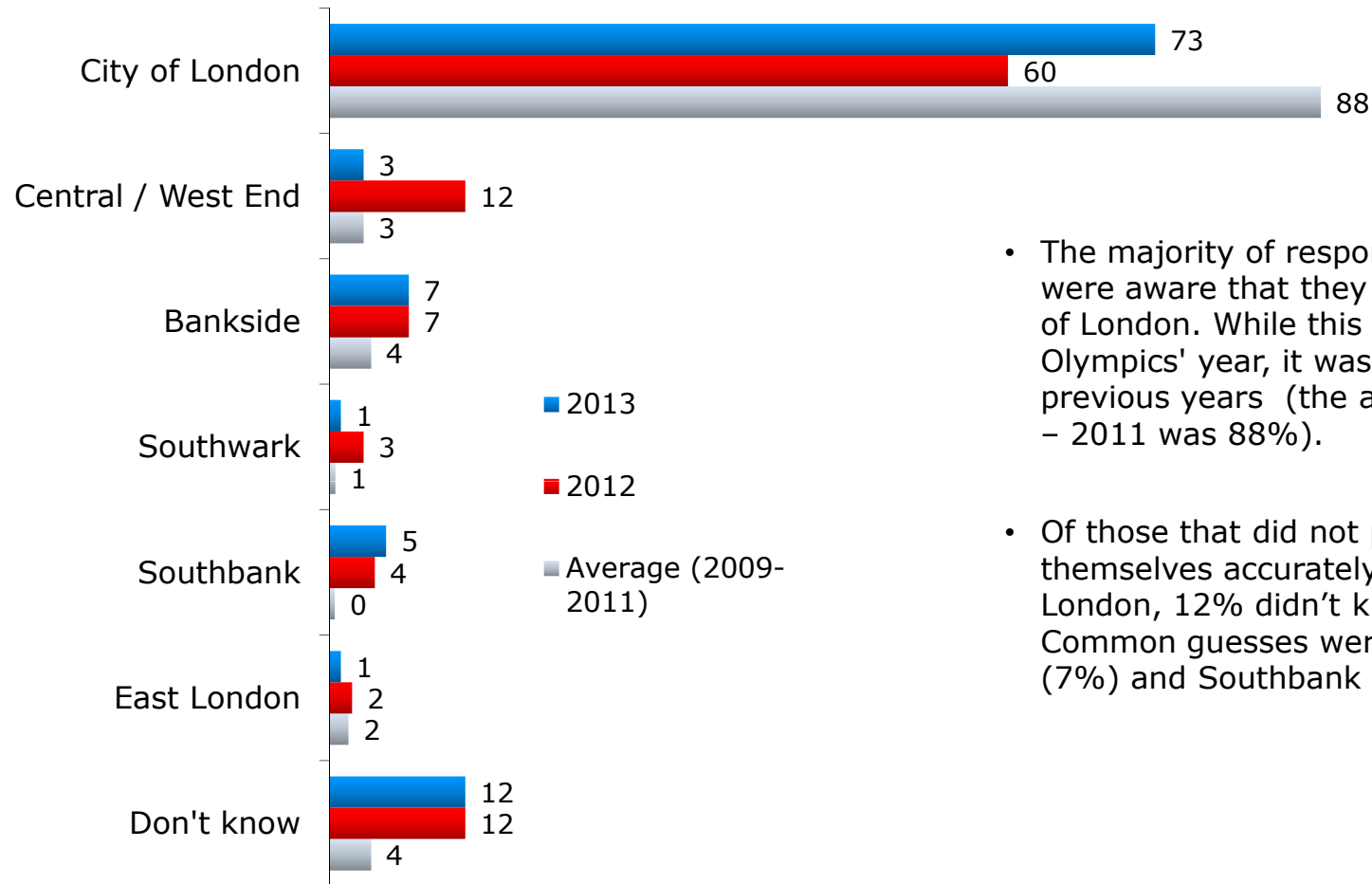
Question = 'What type of accommodation are you staying in?'  
Sample: excludes residents of London (in 2013 N=205)

- This pattern differs from previous years. Use of apartment/house was up significantly possibly reflecting an increase in the availability of people letting out their homes privately via websites (a trend that started for the Olympics).
- Levels of hotel usage were down – 25% of visitors compared to 42% in 2009-11.
- Staying with friends and relatives was also slightly up.

<sup>1</sup> Excludes residents of London.

# **PRE-ARRIVAL**

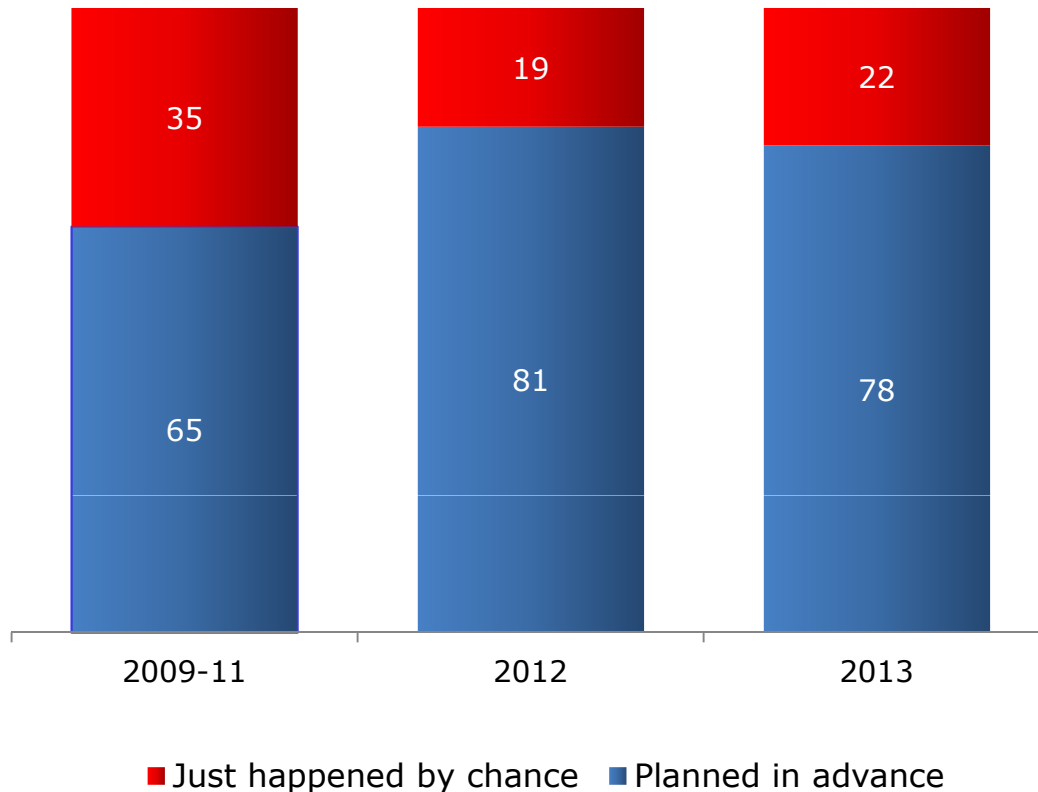
While most CIC users knew they were in the City of London, the proportion was lower than previous years but higher than 2012.



- The majority of respondents (73%) were aware that they were in the City of London. While this was up on the Olympics' year, it was lower than previous years (the average for 2009 – 2011 was 88%).
- Of those that did not place themselves accurately in the City of London, 12% didn't know in 2013. Common guesses were Bankside (7%) and Southbank (5%).

Question = 'Which of the following best describes the part of London you are in now?'  
 Sample: all respondents (in 2013 N=218)

## Four fifths (78%) of CIC users had planned their visit to the City in advance

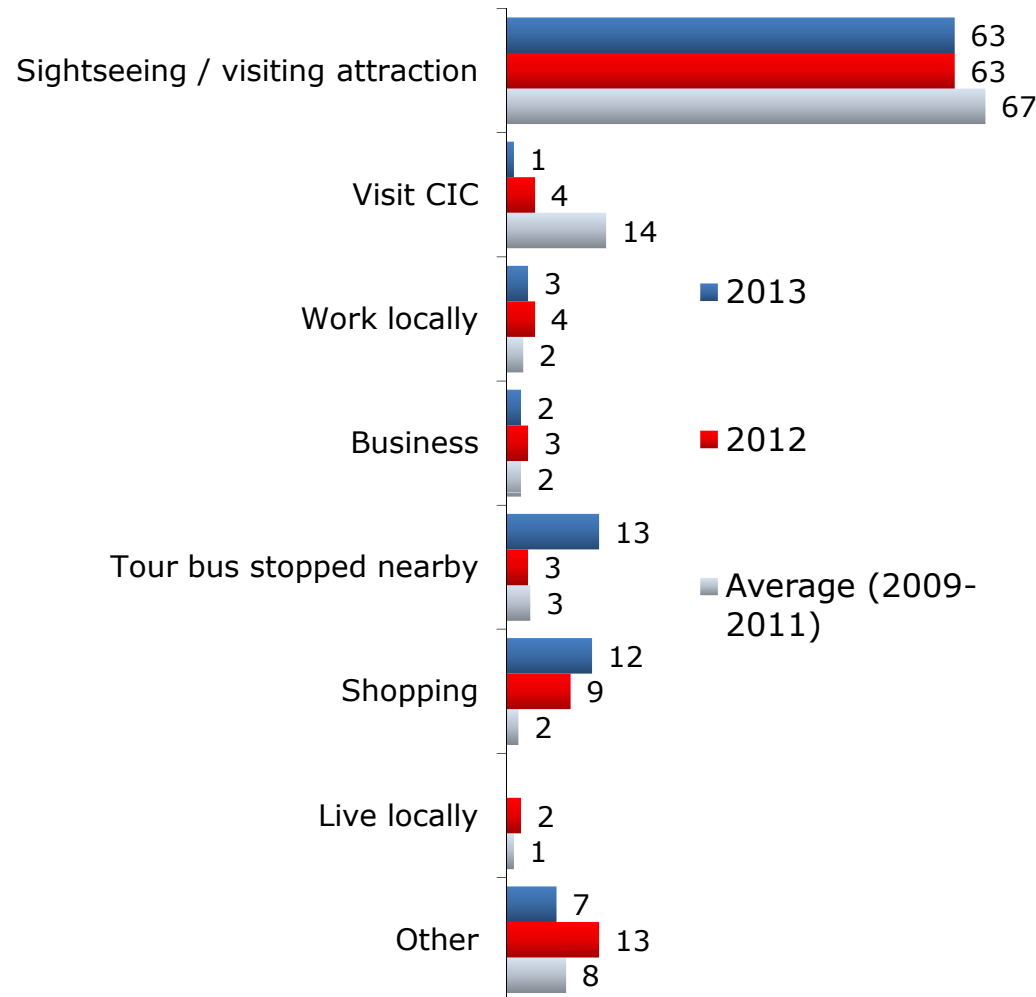


- The proportion planning their trip in advance was on a par with 2012 and significantly higher than the average for 2009 – 2011.
- Younger age groups (16-24 and 25-34) tended to be more spontaneous and were more likely to visit the City 'by chance'.

Question = 'Was your visit to this part of London today planned in advance or just happened by chance?'

Sample: all respondents (in 2013 N=217)

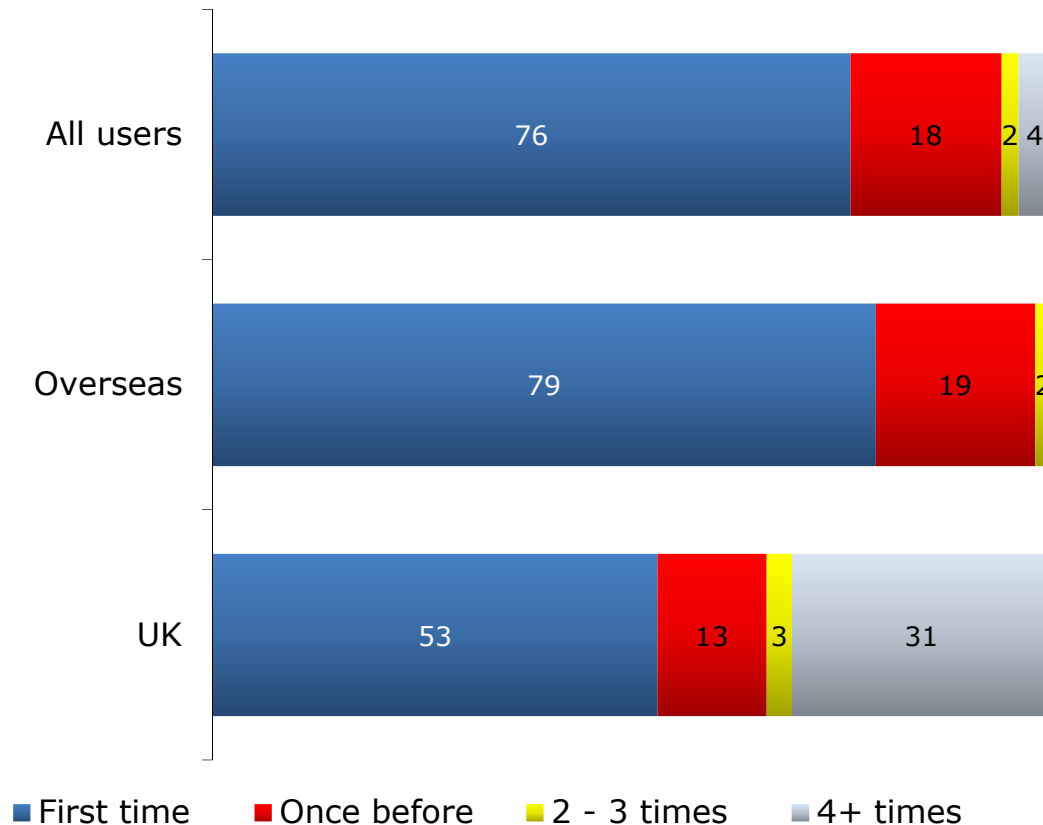
The primary reason, among CIC users, for visiting the City was sightseeing or going to an attraction.



- Sightseeing and visiting attractions, as a reason to visit the City, was similar to previous years.
- There were some changes to previous years.
  - Visitors were more likely to be in the area because they were on a tour bus – 13% compared to 3% in previous years
  - Shopping was also more important – a continuation of a pattern that started in 2012. 12% of visitors were in the area for shopping in 2013. This was similar to the 9% in 2012 but higher than previous years (2%).
- Visiting the City specifically to visit the CIC was also significantly lower than previous years – a continuation of the 2012 pattern. In 2013, 1% of visitors were in the area specifically for CIC, compared to 4% in 2012 and 14% in previous years.

Question = 'Why were you in this specific area of London today?'  
 Sample: all respondents (in 2013 N=217)

In 2013, the majority (76%) of CIC visitors had not used the centre previously. A quarter (24%) were repeat visitors.

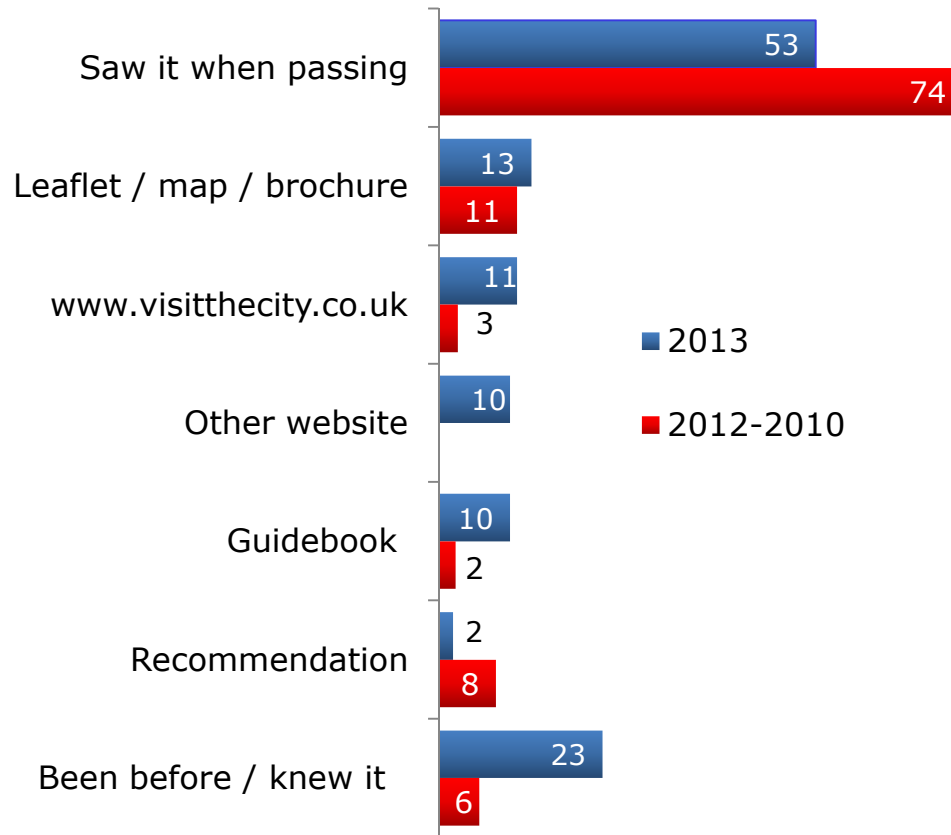


Question = 'Approximately how many times have you been to this Information Centre?'

Sample: All respondents (in 2013 N=218).

- This pattern is broadly the same as previous years. The one main difference was a decrease in the proportion of visitors that had visited two or more times (6% in 2013, compared to 13% in 2012, and 15% in 2009-11). This is probably a result of the lower proportion of high frequency UK visitors (see below).
- Overseas visitors (79%) were more likely to be first time visitors.
- UK visitors (albeit on a small sample in 2013) were more likely to have visited before– 31% had visited the CIC more than 4 times.

Typically users found out about the CIC when passing by – but this was a lower proportion than in previous years.



Question = 'How did you know about this information centre?'  
 Sample: All respondents (in 2013 N=218) Multiple choice question

- The other main sources of information about CIC were a previous visit (23%).
- The pattern did differ from previous years. The proportion finding it via visitthecity.co.uk, a guidebook, and / or knew about it increased. This will reflect guidebooks becoming up-to-date on CIC information, active promotion in the travel press and online promotion of the centre by partners like VisitEngland and London and partners.
- The proportion that saw it when it when passing had decreased.
- This will be partly a result in changes in the question in 2013. These included using a showcard as opposed to reading a list, and the inclusion of new response options - i.e. 'other website' and 'been before/ knew about it' (which had been picked in the 'other' option of the question).
- Other reasons for the changes could include:
  - The higher proportion of overseas visitors – they were more likely to use the web and guidebooks.
  - Increased use of the internet on the move (as opposed to just pre-visit).

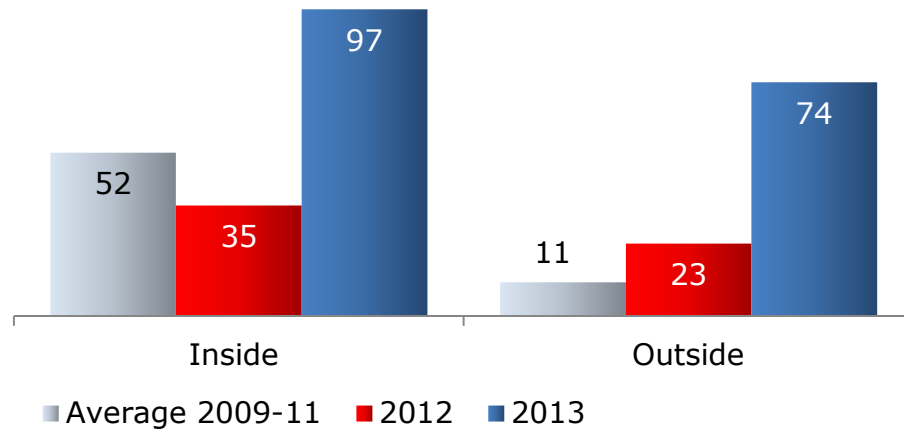




# **INFORMATION USAGE AT CIC**

The proportion of users noticing the screens, both inside and outside, the centre was up significantly on previous years

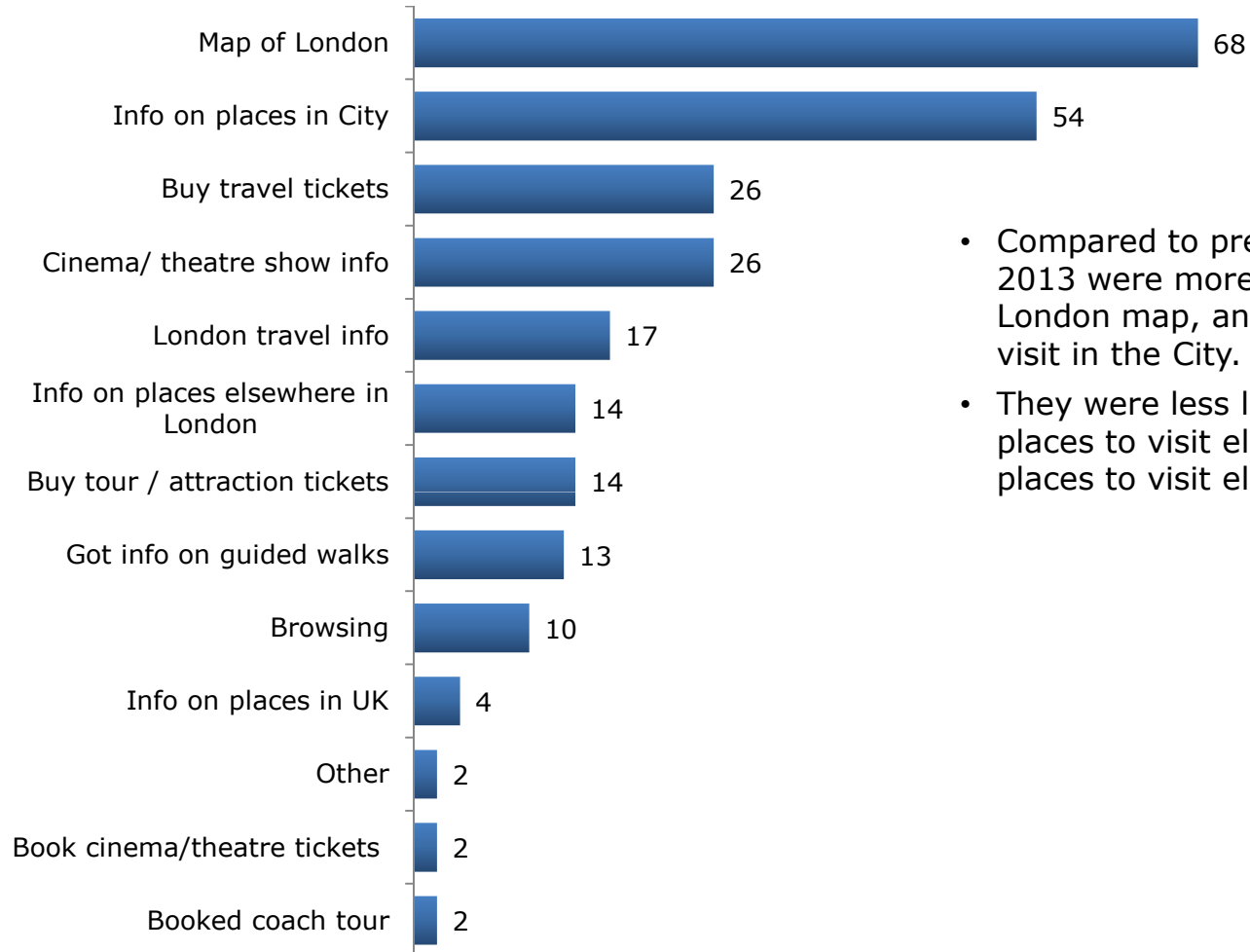
**% who noticed screens**



Question = 'Did you notice the screens outside / inside this centre?'  
Sample: all respondents (in 2013 N=218)

- In 2013, virtually all users noticed the screens inside and three quarters were aware of the outside screens.
- This was an unusual pattern and it will be interesting to see whether it is sustained in the future.
- The increase may be explained by longer queue times at the centre (and hence more time to look at the screens – both inside and out) and better weather, which led to a higher proportion of people lingering outside.

The majority of visitors to CIC had got a map on London and information on places to visit in the City.

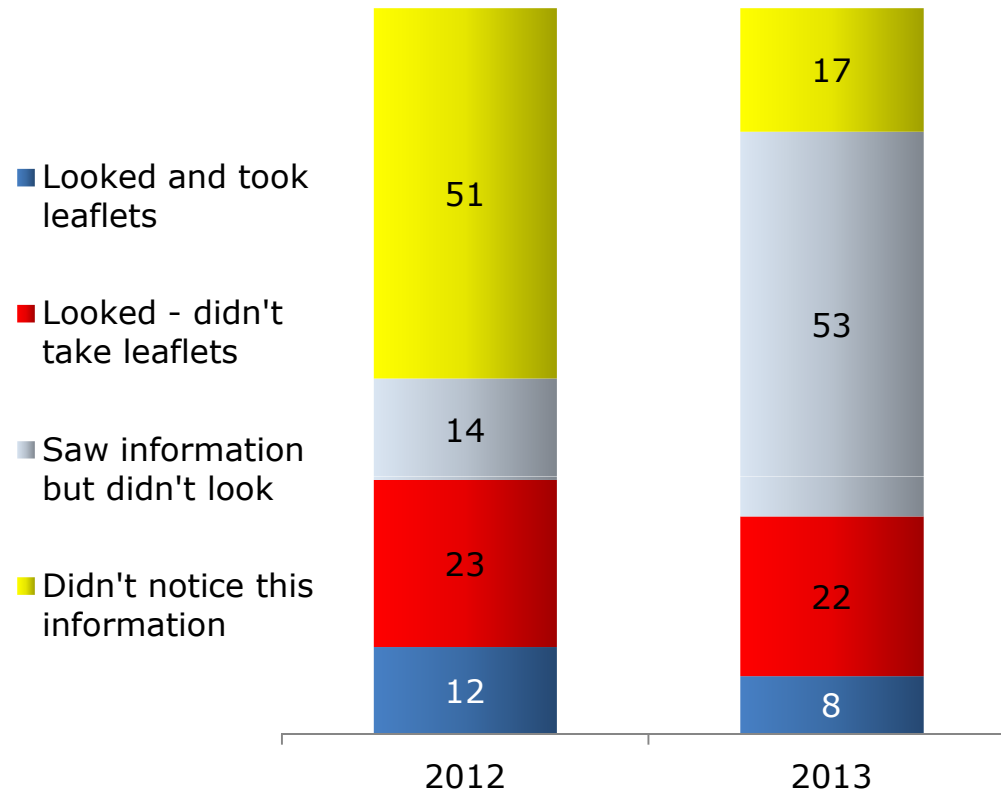


- Compared to previous years, visitors in 2013 were more likely to be looking for a London map, and information on places to visit in the City.
- They were less likely to be looking for places to visit elsewhere in London, and places to visit elsewhere in the UK.

Question = 'What did you do in the Information Centre today?

Sample: All respondents (in 2013 N=218)

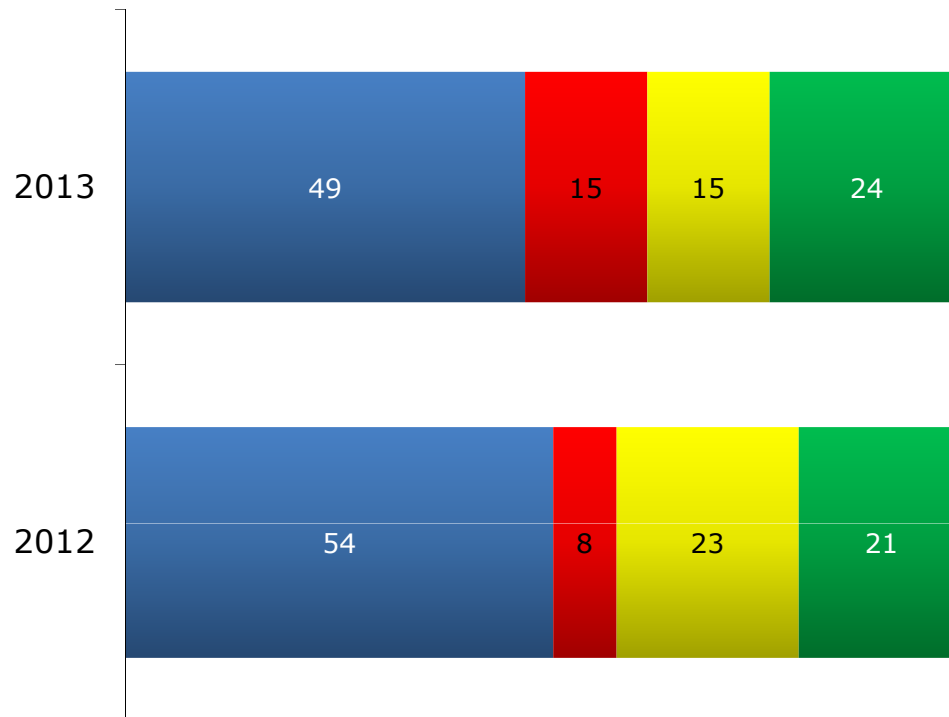
## Awareness of information on the rest of England in the CIC was up significantly in 2013.



- In 2013, 83% of users noticed information about other destinations in England. This was up on 2012 – 49%
- The proportion browsing and taking information was similar to 2012.

Question = 'As well as information about London, this centre is also displaying information about other destinations in England, outside London. Did you look at this information?'  
Sample: all respondents (in 2013 N=218)

About two fifth of users who had looked at England information were using it to help make plans for either their current trip or a future trip.



- This was similar to previous years.

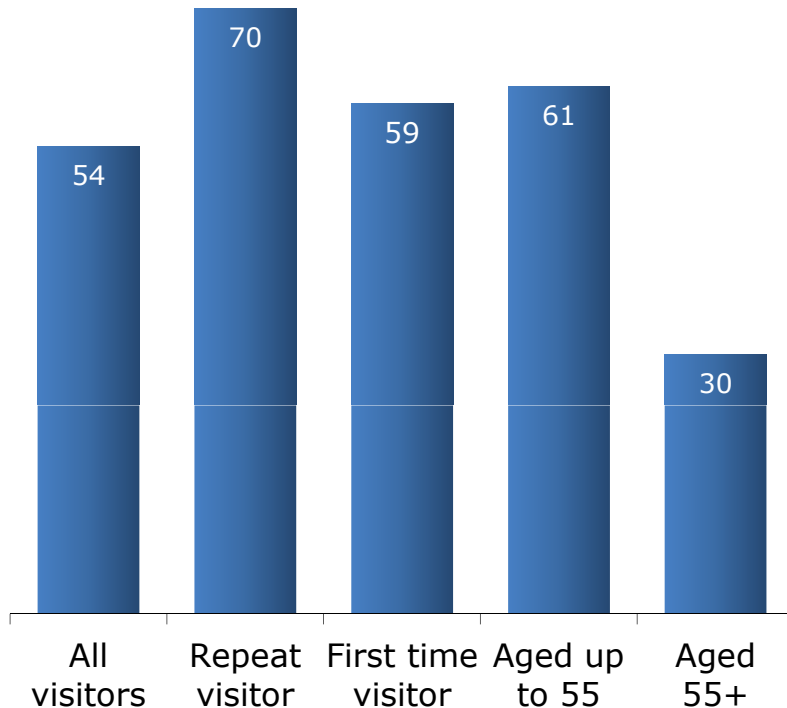
- Curiosity - not expecting to go to any places shown
- To give to someone else planning a trip in England
- Help make plans for future trip
- Help make plans for current trip

Question = 'Why did you look at the information about other destinations outside London?'

Sample: Respondents who browsed England information (in 2013 N=66).

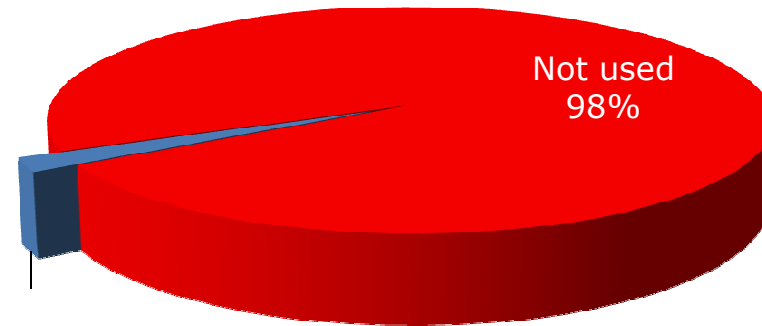
Just over half (54%) of CIC users were aware of the free wi-fi but usage was very low (about 2%).

**% aware of Wi-Fi**



Question = 'Were you aware of the free Wi-fi in the Centre?'  
Sample: All respondents (in 2013 N=218).

**Usage of Wi-Fi**

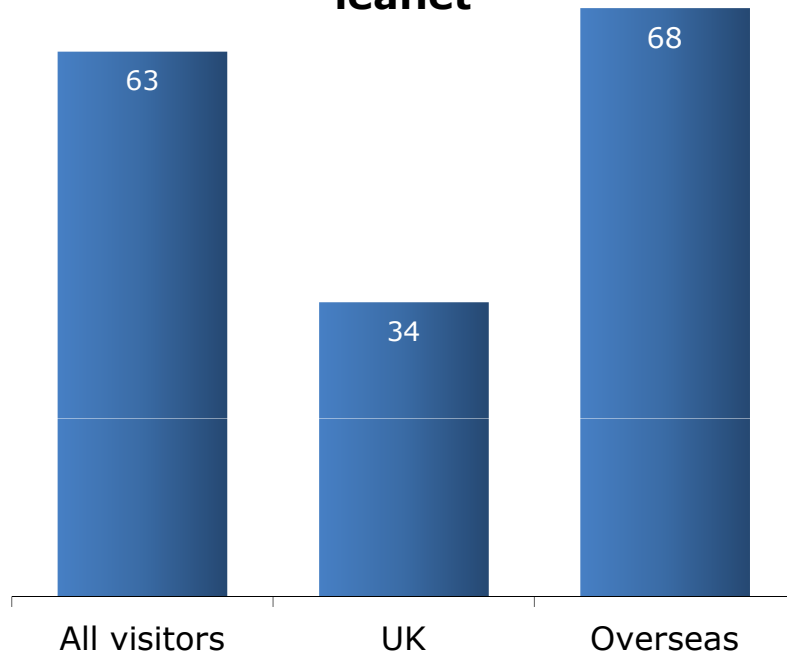


Question = 'Did you use it'  
Sample: Respondents aware of wi-fi (in 2013 N=118).

- Awareness was higher among repeat visitors and younger visitors (but lower in the over 55 age group).

The majority of CIC users (63%) had picked up the leaflet on the City Visitor Trail.

**% picking up City Visitor Trail leaflet**



- Overseas visitors were twice as likely as UK visitors to pick up the City Visitor Trail leaflet.
- None of the sample of respondents had downloaded the Visitor Trail App.

Question = 'Did you pick-up the leaflet on the City Visitor Trail'

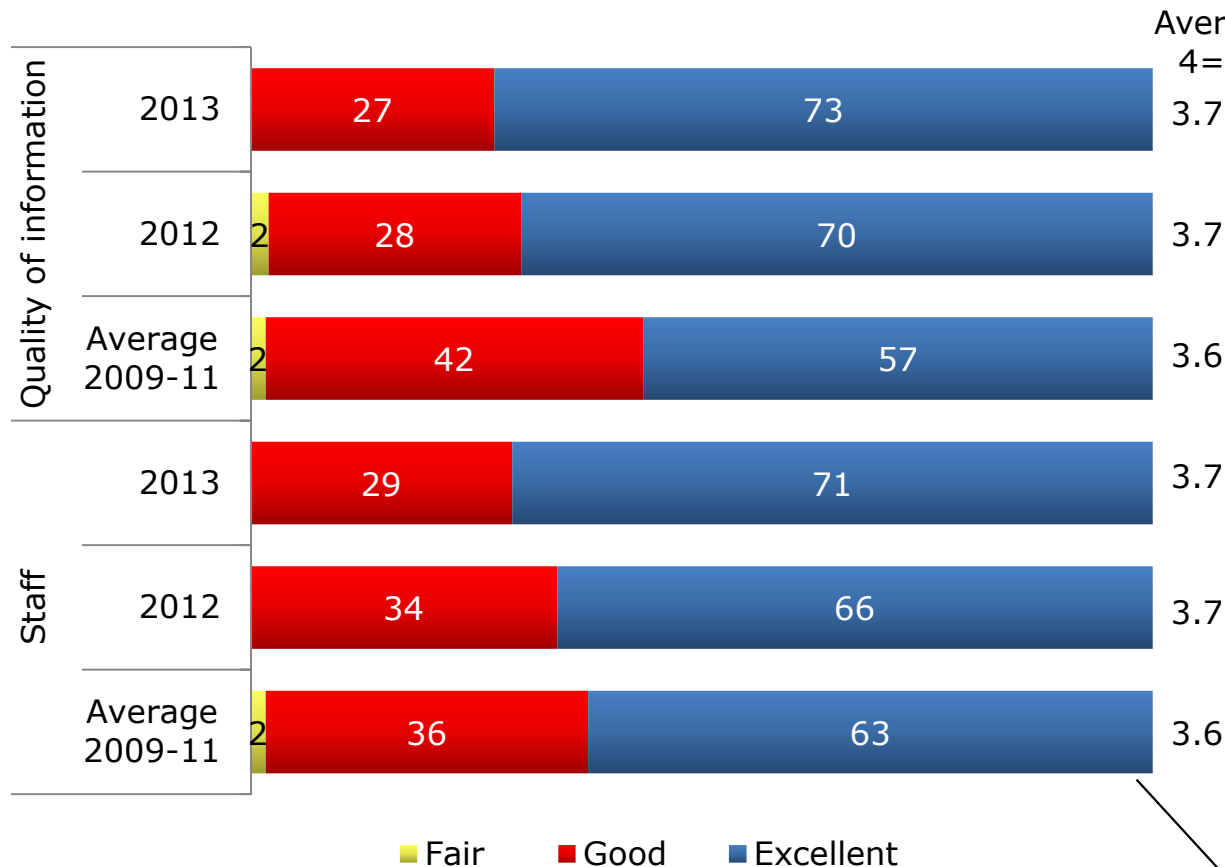
Sample: All respondents (in 2013 N=218).



# **SATISFACTION AND POTENTIAL INFLUENCE**



# User ratings of staff and quality of information were 'excellent'



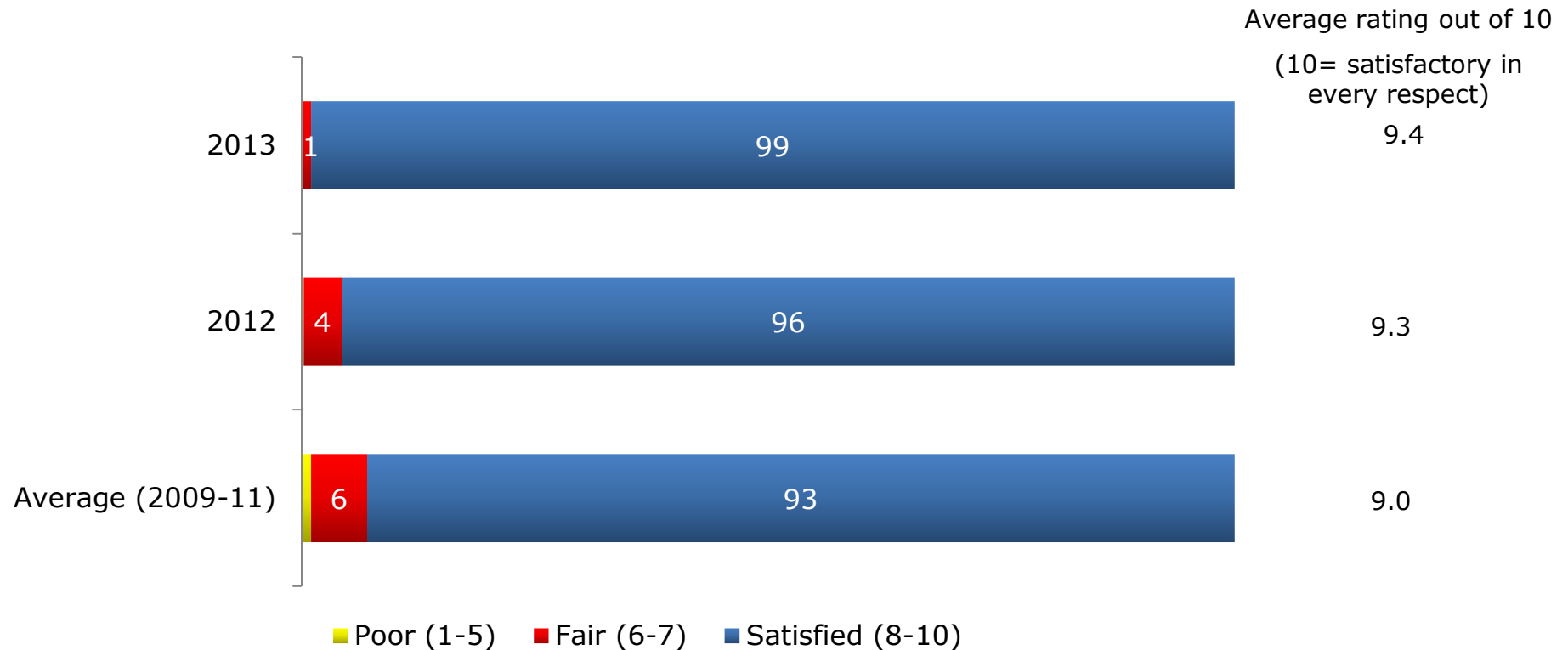
Average rating:  
4= excellent

- Satisfaction with quality of information and staff remained very high – a 100% of respondents rated them as good or excellent.
- Ratings on quality of information were higher among overseas visitors (74% rated it as excellent), older visitors (80% of 35-54 rated it as excellent, and 85% of 55+ year olds), and repeat visitors (94% excellent)
- Satisfaction with staff was higher among repeat visitors (91% rating them as excellent) and 55+ (83% excellent).

Question: How would you rate the person who served you today / quality of information at the Information Centre today?  
 Sample: % of all respondents offering an opinion (NB excludes don't knows and not applicable). Quality of information: n=215. Staff: n= 179

NB – excludes respondents that did not talk to CIC staff. In 2013, 83% of visitors talked to staff (compared to 80% in 2012).

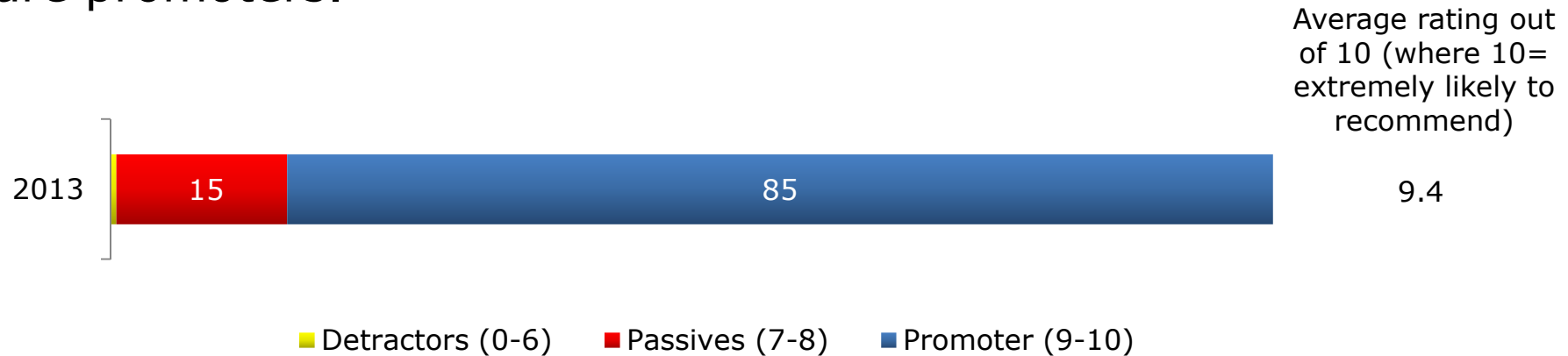
Overall satisfaction with CIC was very high – in 2013, an average of 9.4 out of 10, which was slightly higher than previous years.



Question: How would you rate your overall experience at the Information Centre today?  
Sample: % of all respondents: In 2013 n=218

- Satisfaction was higher among repeat visitors (an average rating of 9.6), and 55+ year old visitors (9.7).

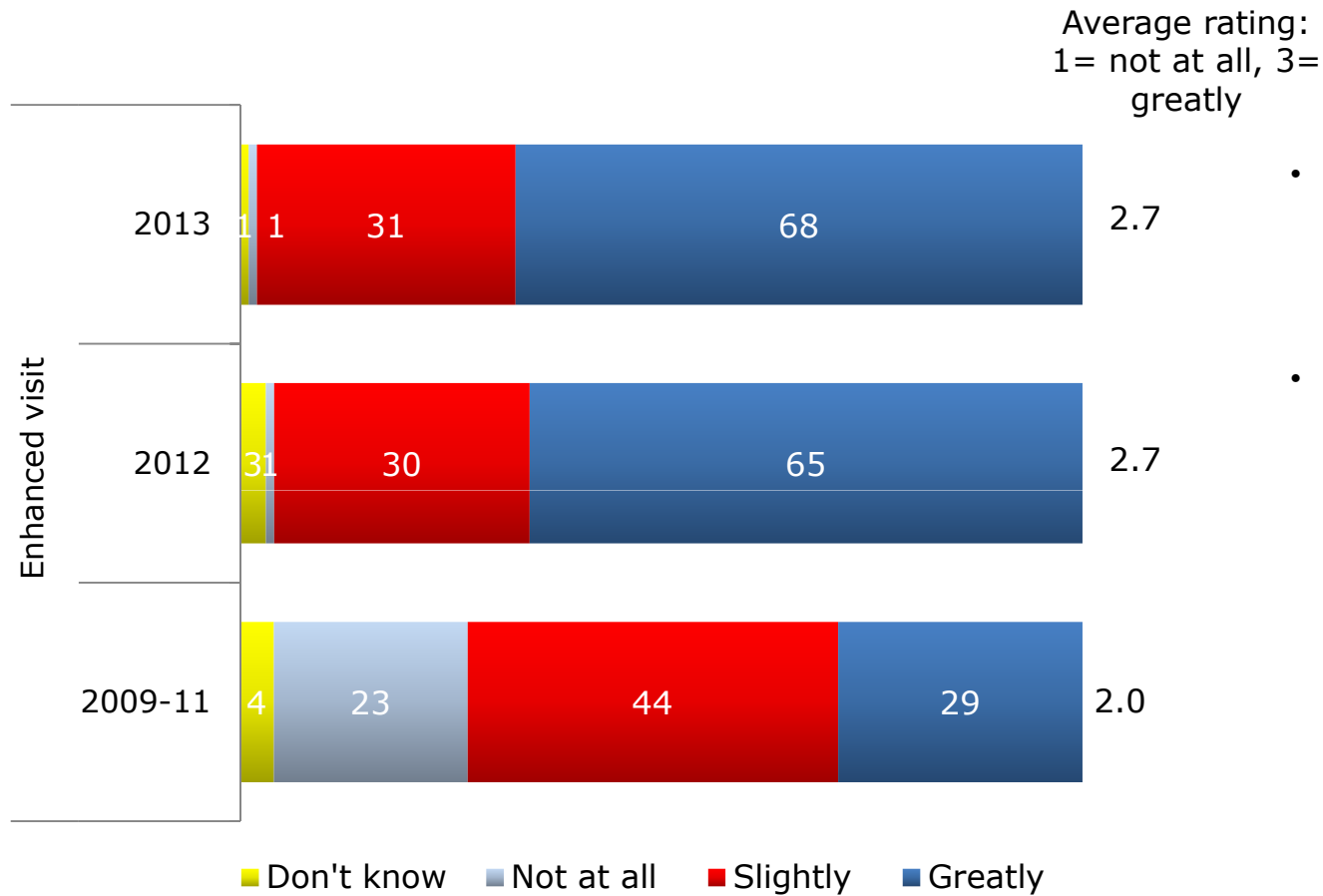
The CIC has a Net Promoter Score (NPS) of 9.4 – 85% of visitors are promoters.



Question: How likely is it you would recommend this centre to a friend or colleague, where 0 is extremely unlikely and 10 is extremely likely?  
Sample: % of all respondents: In 2013 n=217

- The 55+ age group were the most likely to recommend the centre – an average rating of 9.7.
- NB the rating scale of this question was changed in 2013 which makes direct comparisons with previous questions difficult (previous questions had been rated on a three point scale).

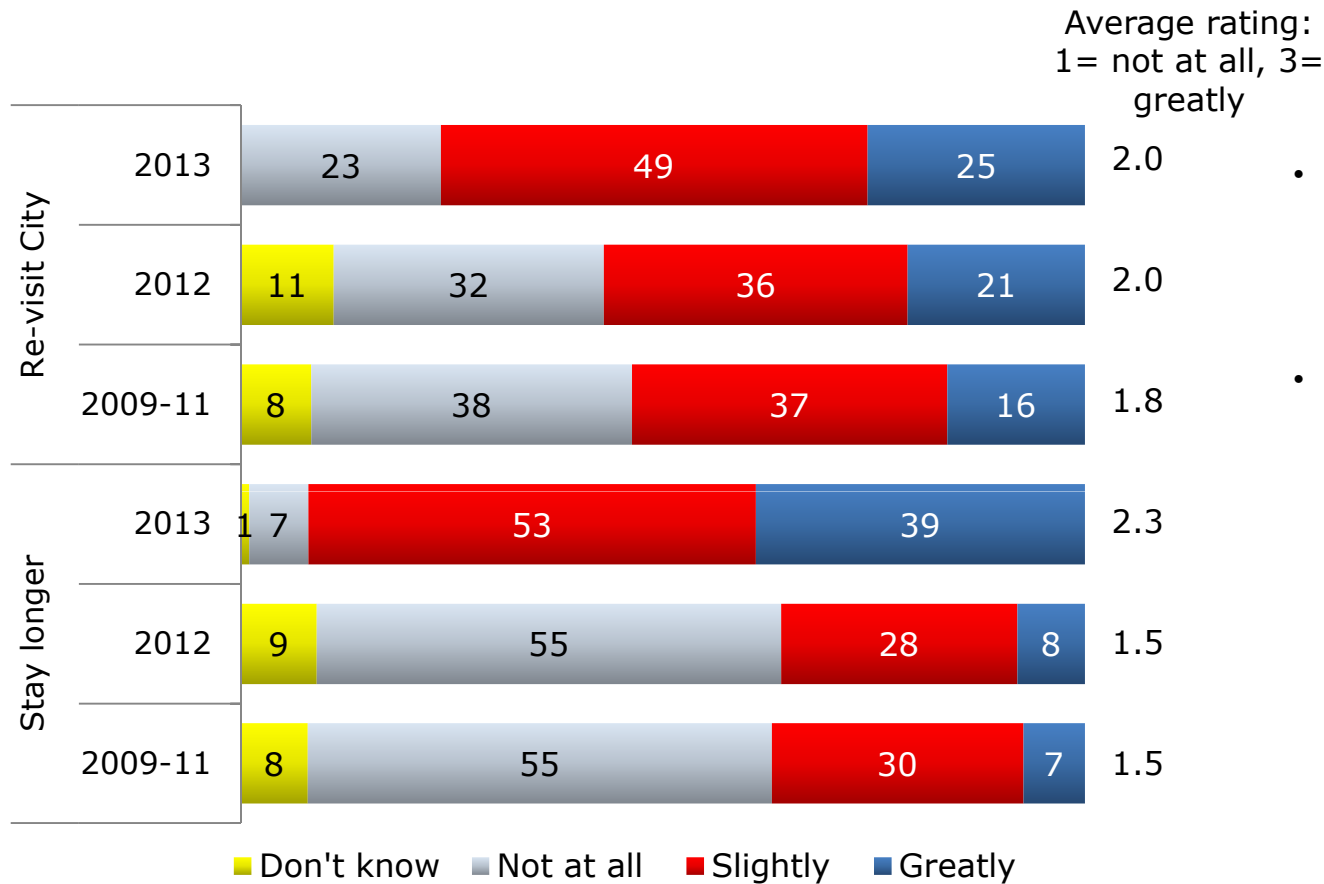
# The CIC had enhanced a visitor's trip to London.



- The role of CIC in enhancing a visit to London continued the pattern of 2012 – i.e. a significant increase over previous years.
- The average rating in 2012 and 2013 was 2.7 out of 3 (i.e. greatly enhancing a visit) compared to 2.0 for 2009-11.

Question: To what extent has the information centre enhanced your visit to London?  
 Sample: % of all respondents: In 2013 n=217.

The CIC was playing a role in prompting a re-visit to the City and, in 2013, a significantly greater role in persuading visitors to stay longer.



- The likelihood of prompting users to re-visit the City was slightly higher in 2013 than previous years and has seen a steady increase since 2009.
- The role of CIC in terms of increasing the likelihood of staying longer in the City saw a dramatic increase in 2013 – with 92% of users slightly or greatly influenced to stay longer in the City. This was an unusual pattern and there may be a number of reasons behind it – good weather, a post Olympic effect and a stronger CIC role in London.

Questions: Do you think the Information Centre visit has increased the likelihood of you....

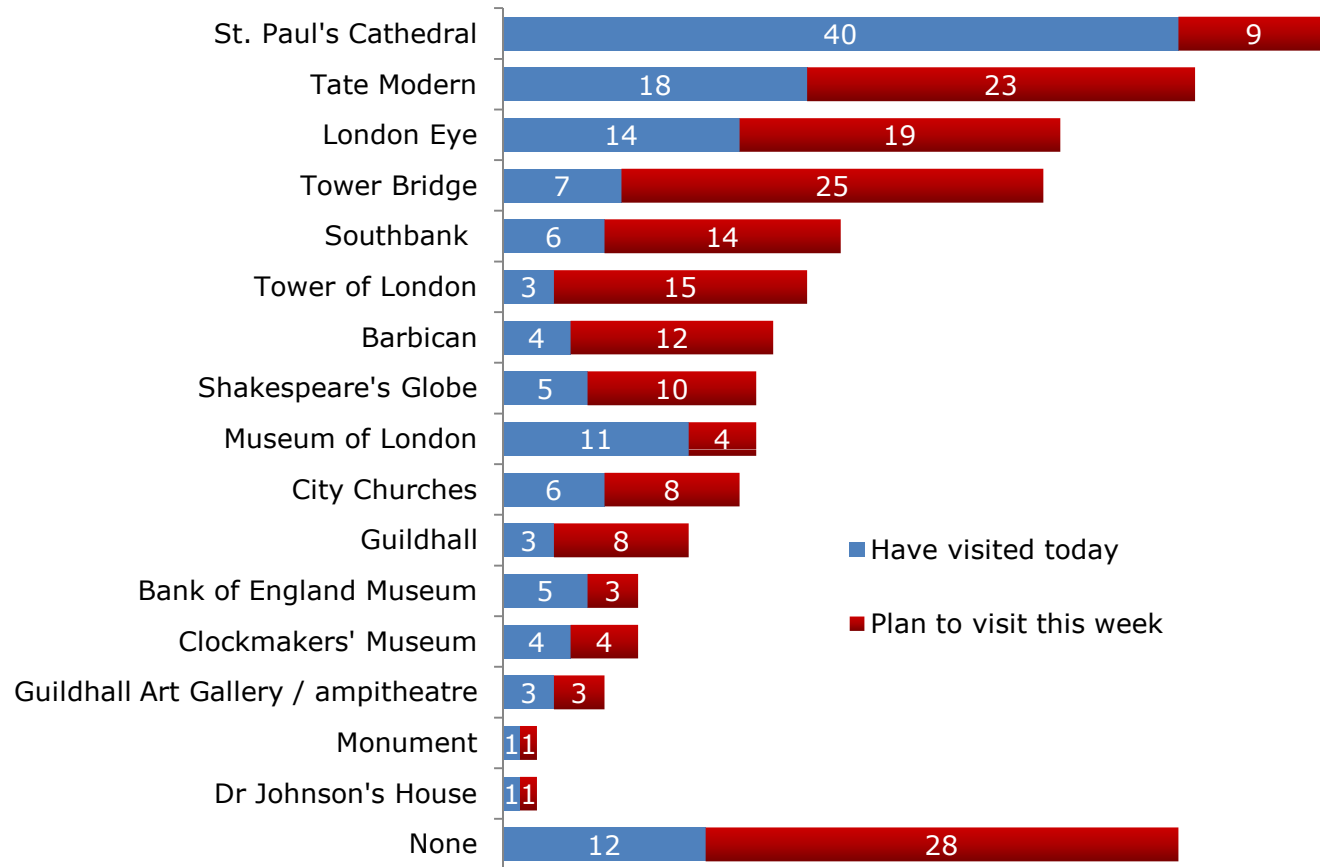
... staying longer here in the City of London this visit ?

.....re-visiting the City of London area in the future?

Sample:% of all respondents: In 2013 n=218

# **VISITS TO ATTRACTIONS**

## The top places of interest were St. Paul's, the Tower of London, Tate Modern, Tower Bridge and London Eye

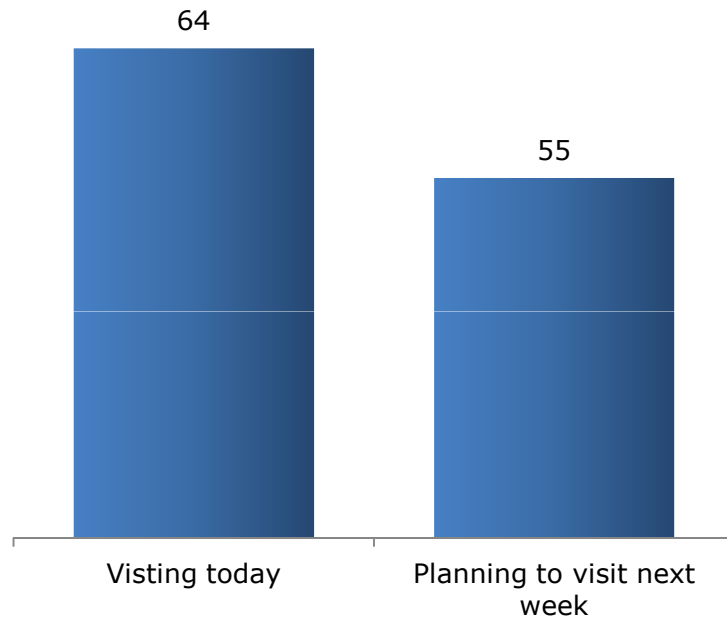


Question: Which of the following places of interest have you visited or plan to visit today? Or do you plan to visit over the next week?

Sample: % of all respondents: In 2013 n=218

Two thirds of CIC users were visiting an attraction in the City on the day of visit (to the CIC).

**% CIC users visiting City attractions**



- The majority of CIC users (albeit a slightly lower proportion) were also planning to re-visit the City over the next week to visit an attraction.
- This was higher among overseas visitors (61%), and 55+ year olds (70%).

Analysis is based on CIC users that visited and / or planned to visit an attraction in the City (This excludes attractions like the Tate Modern, Southbank, London Eye etc).  
In 2013, n=218