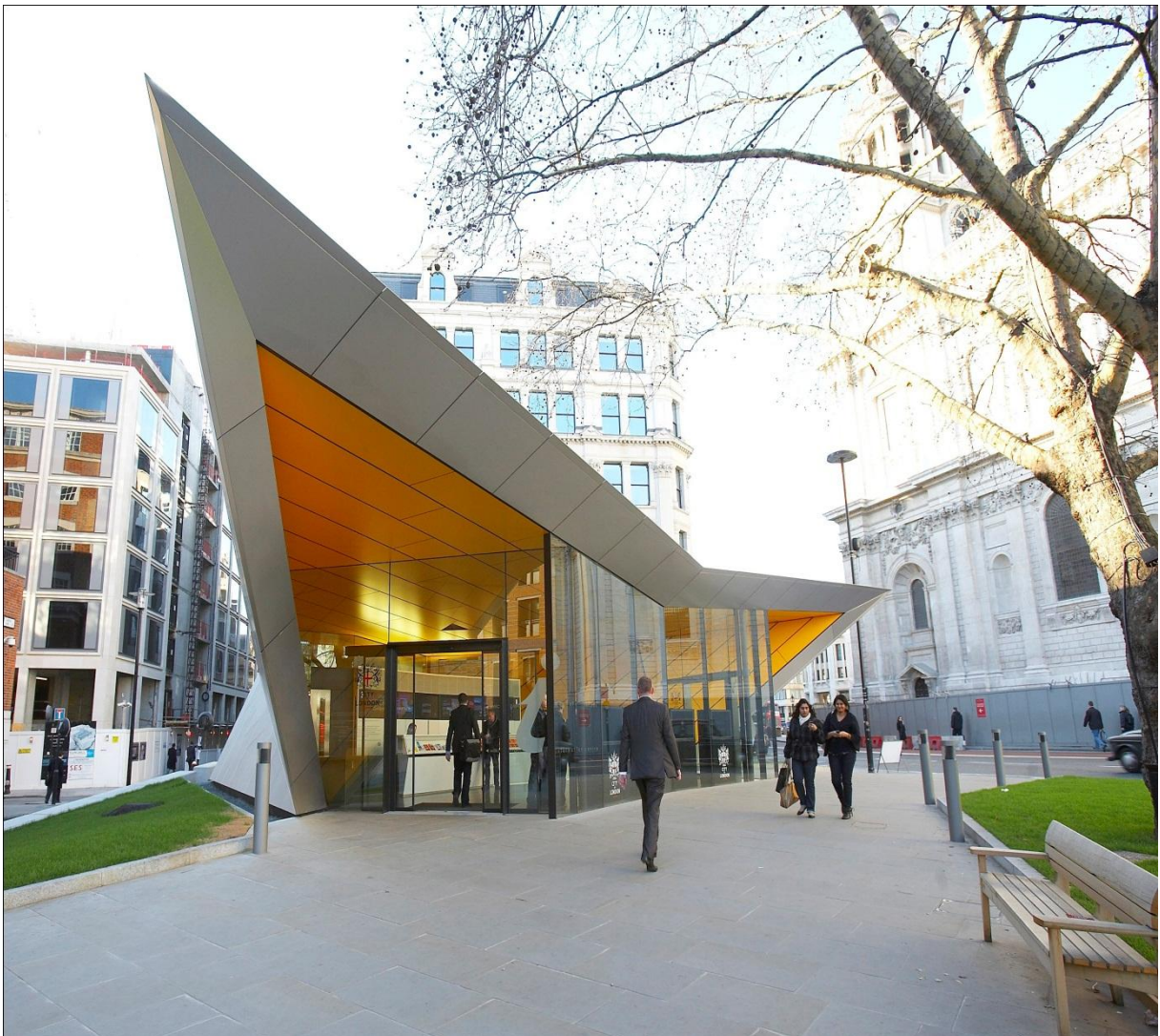




CITY INFORMATION CENTRE



Annual Report 2011—2012

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Contents

1. Executive summary	3
2. Footfall	4
• 2.1 April 2011 - March 2012	4
• 2.2 Monthly footfall comparison	5
3. Enquiries	6
• 3.1 Enquiries - Geographical distribution	7
• 3.2 Visitors - Geographical distribution	7
• 3.3 Contact Centre enquiries	8
• 3.4 Postal, Phone and Email enquiries	8
4. Sales	9
• 4.1 Monthly sales figures	9
• 4.2 Sales breakdown	10
• 4.3 Sales against footfall	11
• 4.4 Average spend per visitor	11
5. Recommendations for 2012-2013	13
6. Appendix	

1. EXECUTIVE SUMMARY

2011/2012 visitor numbers were 14.1% up on 2010/2011. In the first two months of the year visitor numbers were below to those from the previous year, but from June onwards the numbers picked up and December 2011 was the busiest month of the year and the busiest month since the reopening of the Centre. The CIC also reached a milestone with the 1.5 millionth visitor through the doors in January 2012.

There were a number of notable events in 2011 which had an impact on visitor numbers. The volcanic eruptions in Iceland during May undoubtedly had a negative impact on visitor numbers due to decreased inbound tourism, as the vast majority of overseas visitors to London arrive by air. On the positive side the Lord Mayor's show saw 2817 visitors coming through the door on 12th November, and on 30th December the Centre had 3110 visitors, the busiest day that year. The half term periods, European bank holidays, the traffic-free Christmas shopping on Cheapside (3rd December 2011) and the closure of the Britain and London Visitor Centre (BLVC) (23rd December 2011) all gave rise to higher footfall. The last of these is still having an impact.

The total sales revenue for 2011/2012 was £326,538.48, which was 22.9% higher than 2010/2011 sales (£265,710.16). This was largely due to an increase in London Pass sales and tours/attractions through Evan Evans/Golden Tours, also due to the addition of new products: Oyster Cards, City Cruises, stamps, postcards and a few new books. The greatest spend was during the summer months and even when footfall was in decline, sales revenue was largely unaffected. Although inflation was very high during 2011, it cannot account for the increase in sales revenue.

Overall year on year performance showed an increase in both footfall and sales.

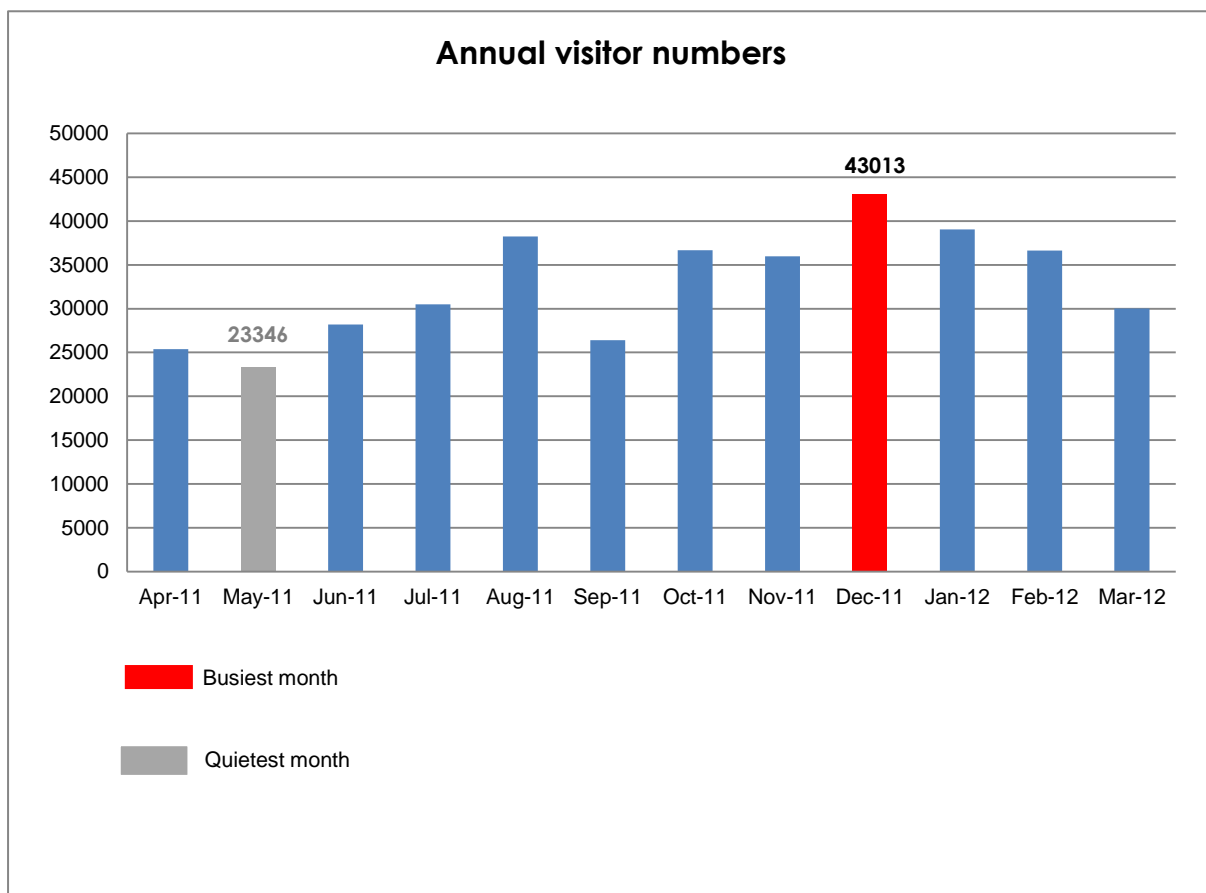
2. FOOTFALL

2.1 APRIL 2011 – MARCH 2012

2011/2012 saw yet another very busy year for the City Information Centre (CIC) with 392,764 visitors coming through the doors.

There were a number of events which attracted higher visitor numbers and they are fairly similar to last year's peak periods, including half term holidays, the Lord Mayor's Show, the Easter break and the festive period between Christmas and New Year. Some of the events were unique to this year – the Royal Wedding, St Paul's 300th anniversary, the volcanic eruption in Iceland and the closure of the BLVC.

A breakdown of monthly footfall figures correlated with specific events can be found at the end of this report in the Monthly Figures Breakdown charts (Appendix).



2.2 Monthly footfall April 2010-March 2011 and April 2011-March 2012

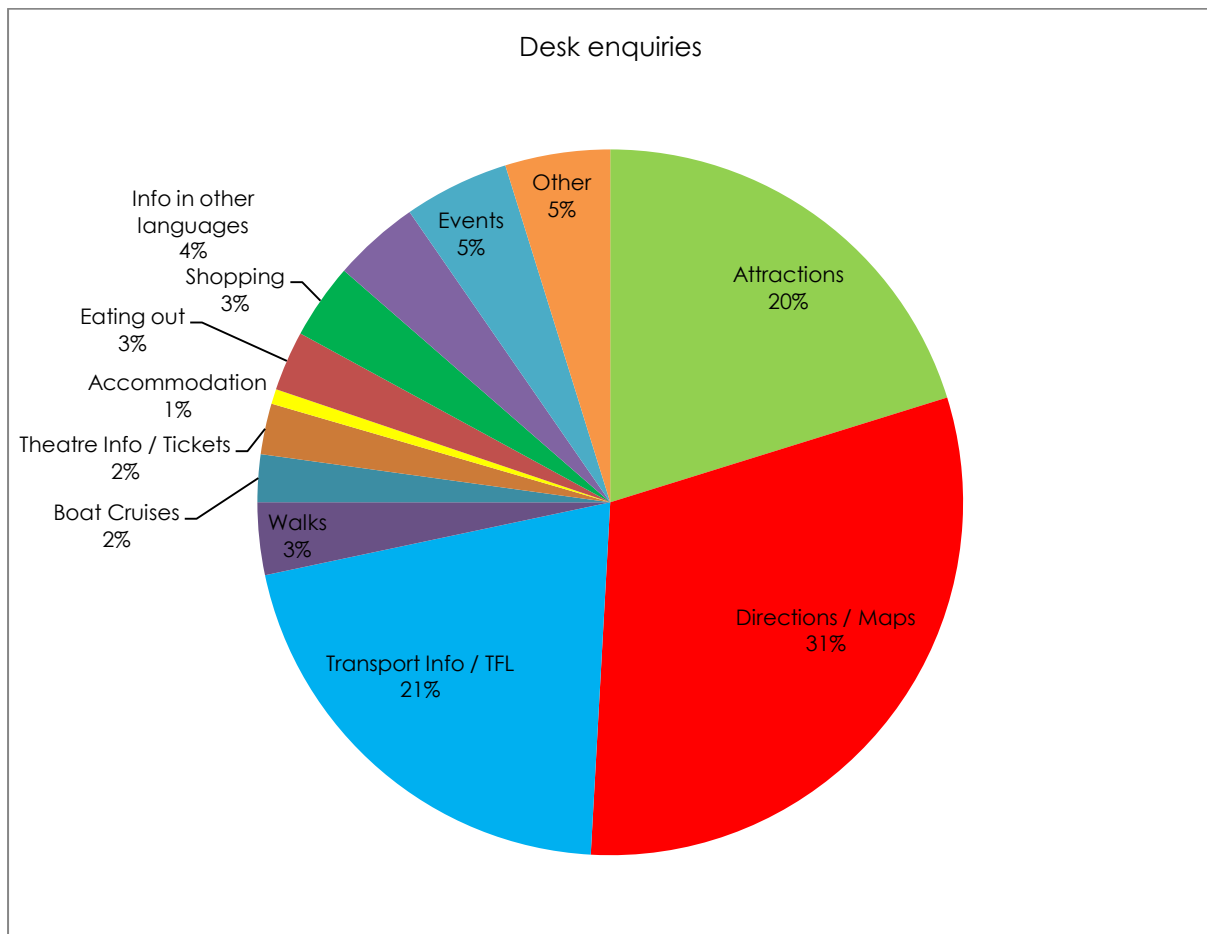
Month	April 2010-March 2011	April 2011-March 2012	Comparison %
April	28309	25364	-10.40
May	25023	23346	-6.70
June	22168	28188	27.16
July	26370	30481	15.59
August	30036	38244	27.33
September	24108	26395	9.49
October	30830	36651	18.88
November	30486	35968	17.98
December	34549	43013	24.50
January	33888	39046	15.22
February	29878	36633	22.61
March	28587	29435	2.97
Total	344231	392764	14.10

While 2011/2012 visitor numbers have shown familiar seasonal trends to 2010/2011 - busy during half term holidays, Christmas period, The Lord Mayor's Show, it is clear that the year on year visitor numbers are going up.

The year started quietly. This was due to the Royal Wedding in April taking more visitors to the Westminster area, as the wedding was held in Westminster Abbey. From the 24th May 2011 hundreds of inbound and outbound flights were affected due to the volcanic ash cloud drifting from Iceland. From June onwards visitor numbers started to outperform 2010/2011 with December being the busiest month (43,013 visitors) since the reopening of the CIC in November 2007.

3. ENQUIRIES

The range of enquiries during the last year is shown below.



Directions and maps was by far the most popular enquiry in 2011/2012 representing nearly a third of all enquiries. This was closely followed by advice on Attractions and then Transport Information. In total these three categories accounted for 72%, which is 2% more than in 2010/2011, of all queries at the Centre in 2011/2012 and underlines the important contribution of the Centre in facilitating London's tourist market.

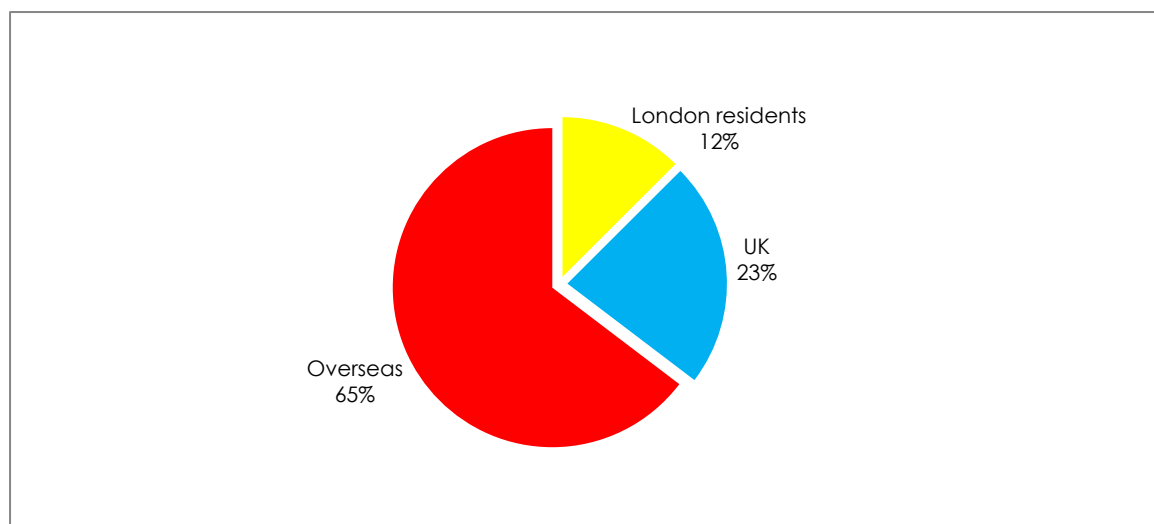
Furthermore it highlights the importance of the continued close liaison with tourism stakeholders in ensuring accurate and reliable literature is available for visitors coming into the Centre. The existing arrangements with distributors and attractions themselves, ensures we are continually stocked and able to provide full information and services.

3.1 Enquiries - Geographical distribution

Areas	Visitors	%
City	23175	35.6
Greater London	37589	57.8
UK	4303	6.6
Total	65067	100.0

Enquiries grouped by geographical distribution did not alter significantly from month to month, so the annual figures given here are indicative of the general proportions.

3.2 Visitors - Geographical distribution



These figures are approximate, as the origin of an individual visitor is often difficult to ascertain, and the definitions are somewhat fluid. However this information is helpful in identifying the increasingly important role played by the Centre to London residents in providing information and that while we continue to address our overseas visitors, there is a significant proportion of local residents requiring a different type of information and services.

From 1 April 2012 the CIC started recording visitor origin by entering their home country, which will improve our understanding of our customer's requirements.

3.3 Contact Centre enquiries

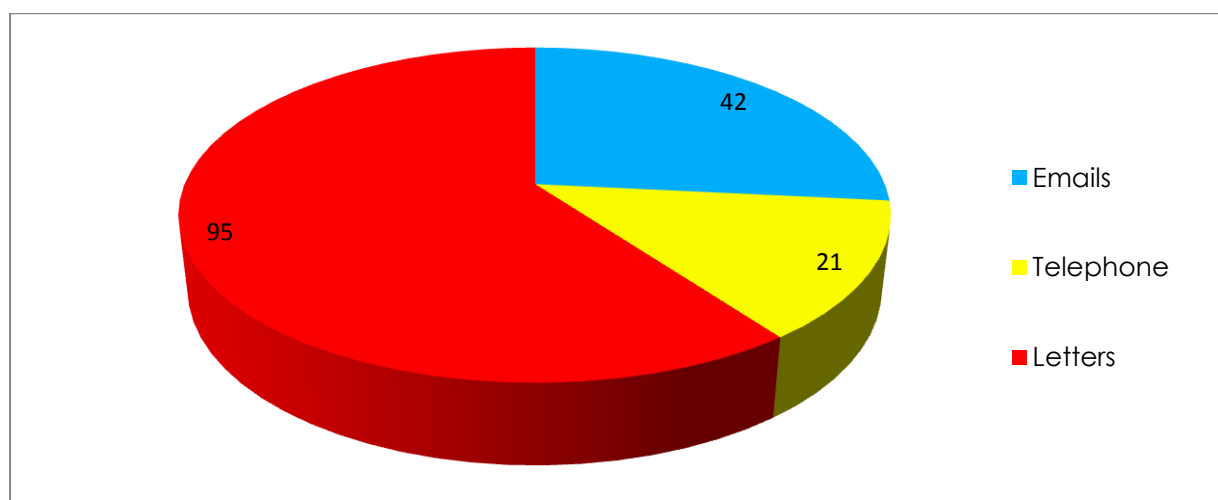
The City of London Corporation has its own Contact Centre, which deals with external and internal phone enquiries. From time to time the Contact Centre contacts the CIC via email or phone, because certain enquiries (tickets for the Livery halls, maps and guides to be posted etc.) can only be dealt with by the CIC. On average the CIC deals with 40-60 Contact Centre queries a month.

The City of London Information Centre dealt with approximately 360 Contact Centre enquiries during the 2011/2012 financial year. It is worth mentioning that the actual number of enquiries is likely to be slightly greater, because not all queries are recorded during busy periods.

The two most common enquiries were information regarding Livery Hall tickets and requests for maps/brochures to be posted. All others were mixed: changing of the guards, CIC opening time during Christmas festive period, info about City gardens, the Olympics and many others.

3.4 Postal, Phone and Email enquiries

The CIC receives some of the public enquiries by post, email or telephone. Statistics for these are also recorded. In 2011/2012 the CIC received 52 emails, 23 phone calls and 95 letters. As mentioned before, the actual figures are likely to be slightly higher than the recorded ones, due to the fact that some of the enquiries are not recorded during very busy periods.

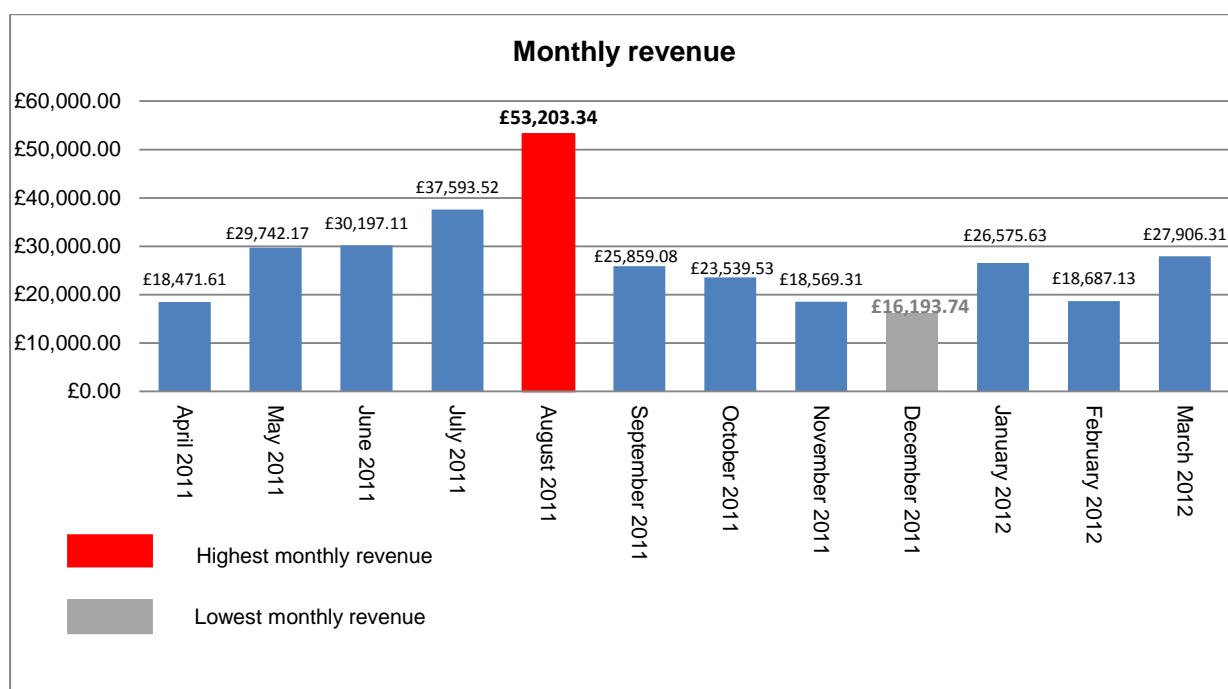


4. SALES

4.1 Monthly sales figures

The CIC generated £326,538.48 worth of sales in 2011/2012, which is 22.9% more than sales in 2010/2011 (£265,710.16). As you can see from the following graphics, this was largely due to high sales figures during the summer months; August saw the highest revenue with £53,203.34, second highest was July with £37,593.52 and June was third - £30,197.11.

There are many factors behind increased sales in the summer months. Among these is the tendency for the Centre to sell more outside London trips such as those offered by Evan Evans and Golden Tours. Also visitors tend to use sightseeing buses more during summer months. Lastly, there have been new additions to our product range that mean we can sell more products to the same size customer base Oyster cards, stamps, postcards, British Heritage Passes and river cruises.



4.2 Sales breakdown

Product	Sales total	%
Barbican	1428.95	0.4
Big Bus Tours	£31,627.51	9.7
British Heritage Passes	£4,056.24	1.2
City Cruises	£1,868.95	0.6
Encore Tickets	£32,048.13	9.8
Evan Evans Tours	£37,058.60	11.3
Golden Tours	£41,010.06	12.6
Leisure Pass Group	£101,927.37	31.2
Maps, books, postcards and Olympic badges	£8,119.77	2.5
Original Sightseeing Tours	£42,074.38	12.9
Oyster cards	£17,222.63	5.3
Royal Mail (stamps)	£504.71	0.2
St Paul's Cathedral	£7,591.18	2.3
Total	£326,538.48	100.0

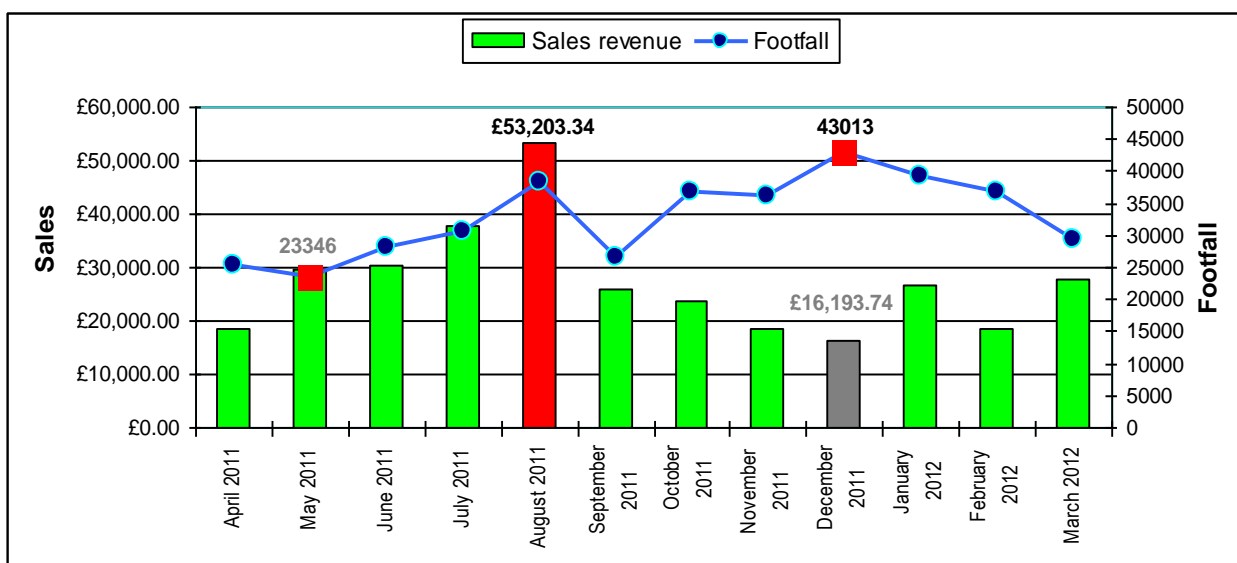
The biggest contributor to the total revenue in 2011/2012 was Leisure Pass Group (London Pass) with £101,927.37, which accounts for 31.2% of all sales. The second highest contributor to sales was The Original Sightseeing Tours with £42,074.38 and in third place was Golden Tours – £41,010.06.

Royal Mail contributed the least to the sales total, but this is due to low unit prices of the products (1st class – £0.46, EU – £0.68 and World stamps – £0.76) and the fact that the centre has only started selling stamps from November 2011. In April 2012 the price of stamps increased so next year's sales from Royal Mail should bring in more revenue.

In 2011/2012 the CIC introduced some new products: City Cruises, Oyster cards, stamps, post cards and British Heritage Passes, which contributed about £25,000 to the total revenue for 2011-2012.

The most impressive product in terms of sales revenue (although the commission level is very low) is the Oyster Card. Having been added to our product range only at the beginning of December 2011, in 4 months the CIC sold £17,222.63 worth of Oyster products which is 5.3% of all sales. Next year Oyster Card sales may well account for £45,000 and generate one of the highest sales revenue.

4.3 Sales against footfall



Highest sales revenue
 Lowest sales revenue

When comparing visitor numbers against revenue it is clear to see that a high footfall does not mean the CIC generates a lot of revenue. The graph above shows that December 2011 was the busiest month that year (and the busiest since the reopening of the centre with 43,013 visitors), but sales revenue was the smallest in the 2011/2012 Financial year (£16,193.74). The busiest month in terms of revenue and footfall was August.

4.4 Average spend per visitor

Month	Footfall	Sales	Spend per visitor
April	25364	£18,471.61	£0.73
May	23346	£29,742.17	£1.27
June	28188	£30,197.11	£1.07
July	30481	£37,593.52	£1.23
August	38244	£53,203.34	£1.39
September	26395	£25,859.08	£0.98
October	36651	£23,539.53	£0.64
November	35968	£18,569.31	£0.52
December	43013	£16,193.74	£0.38
January	39046	£26,575.63	£0.68
February	36633	£18,687.13	£0.51
March	29435	£27,906.31	£0.95
Total	392764	£326,538.48	£0.83

Calculated per visitor, the average annual spend was £0.86. Because of the discrepancy between visitors and revenue in August and December, the average revenue per visitor in August was £1.39 and December was just £0.38.

As mentioned before summer months tend to generate the most revenue, due to visitors booking more outside London trips, sightseeing tours and river cruises, but the centre receives most visitors in the period between Christmas and New Year.

5. Recommendations for 2012-2013

London and the City are facing probably one of the busiest years in their history, due to the Diamond Jubilee, Olympic and Paralympic games in London this summer

Since the closure of Visit Britain flagship TIC in December 2011 the CIC has had increased expectations in areas such as staff knowledge and expertise about Great Britain as a visitors' destination. So it is very important to train CIC staff and have more available literature on areas outside London. Working closely with Enjoy England is a very good starting point.

To provide a world class service, improving staff knowledge and expertise is essential. This will include GLA, customer service, familiarisation trips and special trainings for the Olympics.

Extended opening hours during the Olympics and Paralympics games will be implemented to meet the needs of all visitors coming to London for the Olympics period.

A review of the Centre's retail offering has begun and this will continue into 2012-2013. This is already giving results, with an accommodation booking service being introduced imminently, and the Centre being the only official outlet for Open Garden Squares Weekend 2012. With regards to literature, the review will focus on replacing the unpopular titles with others deemed more appropriate to visitors, and the addition of some souvenirs. In terms of new products there will be some business case analysis carried out on introducing new products such as National Express coaches and Hudson's heritage passes, especially given the recent demise of BLVC.