

**Date:** 24 February 2016

**Item:** Visitor Centres – Analysis of Customer Experience

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**This paper will be considered in public**

## **1 Summary**

- 1.1 A network of new Visitor Centres opened in September 2015 following a phased build process that started in October 2014. This paper sets out what the Visitor Centres offer tourists and how this benefits the new station operating model at Gateway stations. The data from the first operating periods of the Visitor Centres has been analysed and is presented here to provide an early indication of what has changed and the impact on the visitor experience. The detailed information is set out in Appendix 1.

## **2 Recommendation**

- 2.1 **The Panel is asked to note the paper.**

## **3 Background**

- 3.1 As part of the Fit for the Future - Stations Programme, an existing network of Travel Information Centres (TICs) were transformed into Visitor Centres and two additional centres built in order to ensure coverage at all the main visitor points of entry. This transformation was carried out to enhance the experience of infrequent users at Gateway stations and to support the station operations. The Visitor Centres were an enabler to ticket office closure at the Gateway stations.
- 3.2 The Visitor Centres, operated and managed by TfL Customer Experience, provide a tailored service for unfamiliar and infrequent customers at their arrival and departure points. This is the part of the journey where visitors are most vulnerable and in need of most assistance. The primary function of the Visitor Centres is to provide travel ticketing to tourists but also to offer impartial advice.

## **4 Financial Implications**

- 4.1 The transformation of the TICs to Visitor Centres has been funded from the Fit for the Future – Stations Programme. The project cost was £3.8m.

**List of appendices to this report:**

Appendix 1: Presentation on Visitor Centres – Analysis of Customer Experience

**List of Background Papers:**

None

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# Visitor Centres - Analysis of Customers' Experiences

Rail and Underground Panel

24 February 2016



# New Visitor Centre network now fully open

A network of eight Visitor Centres fully opened in September 2015

Visitor Centres are located at main Gateway points:

- Euston
- Gatwick North Terminal
- Heathrow Terminal 2 and 3
- King's Cross St Pancras
- Liverpool Street
- Paddington
- Piccadilly Circus
- Victoria



King's Cross St Pancras Visitor Centre



Victoria Visitor Centre



Heathrow Terminal 2 and 3 Visitor Centre



# Visitor Centre proposition

To provide a range of transport and tourist tickets and information to first time and infrequent visitors

1. Provide trusted and impartial information on the transport network and London
2. Offer official guidance and sales of TfL travel products that reflect specific requirements of visitors
3. Promote parts of TfL that have particular appeal to visitors - Emirates Airline, River Services, Santander Cycles and London Transport Museum
4. Provide popular and good value third party tourist tickets and services



# What has changed?

Previously a network of six Travel Information Centres (TICs) provided a more generic service to a broader customer base.

The transformation into Visitor Centres includes:

- 1. Enhanced customer and staff environment**  
Removing security glass and replacing with open counters where possible, creating a more retail feel
- 2. Improved customer service model**  
Roaming agents to assist customers, zoned information areas and coordinated customer services with LU staff
- 3. Greater value added services for customers**  
Enhanced third party tourist tickets and services.  
Promotion of TfL visitor offer
- 4. Part of an integrated visitor offer**  
Consistent visual identity and greater promotion across TfL and third party channels



# Greater integration of Visitor Centres with new Station Operating Model

- Visitor Centres provide a tailored service for unfamiliar and infrequent customers that helps to keep stations free of congestion and provides tourists with assistance when they most need support
- Coordinated customer service principles have been established locally by the Visitor Centre Managers and Area Managers to improve the customer welcome
- The Visitor Centre Meet and Greet function will help to deliver a more coordinated customer experience between the Centre and ticket hall
- London Underground Customer Service Agents (CSAs) in high visitor footfall stations without a Visitor Centre will focus on delivering the customer welcome



# Visitor Centres customer profile is starting to change and reflect its tailored tourist service

- Visitor Centres are at an embryonic stage and customer trends are still emerging
- However, first four periods since the network opened show an increase in footfall compared against previous years
- The proportion of visitors and non-visitors using the Visitor Centres compared to the Travel Information Centres has remained the same, however the proportion of overseas visitors has increased



# Visitor satisfaction levels have increased

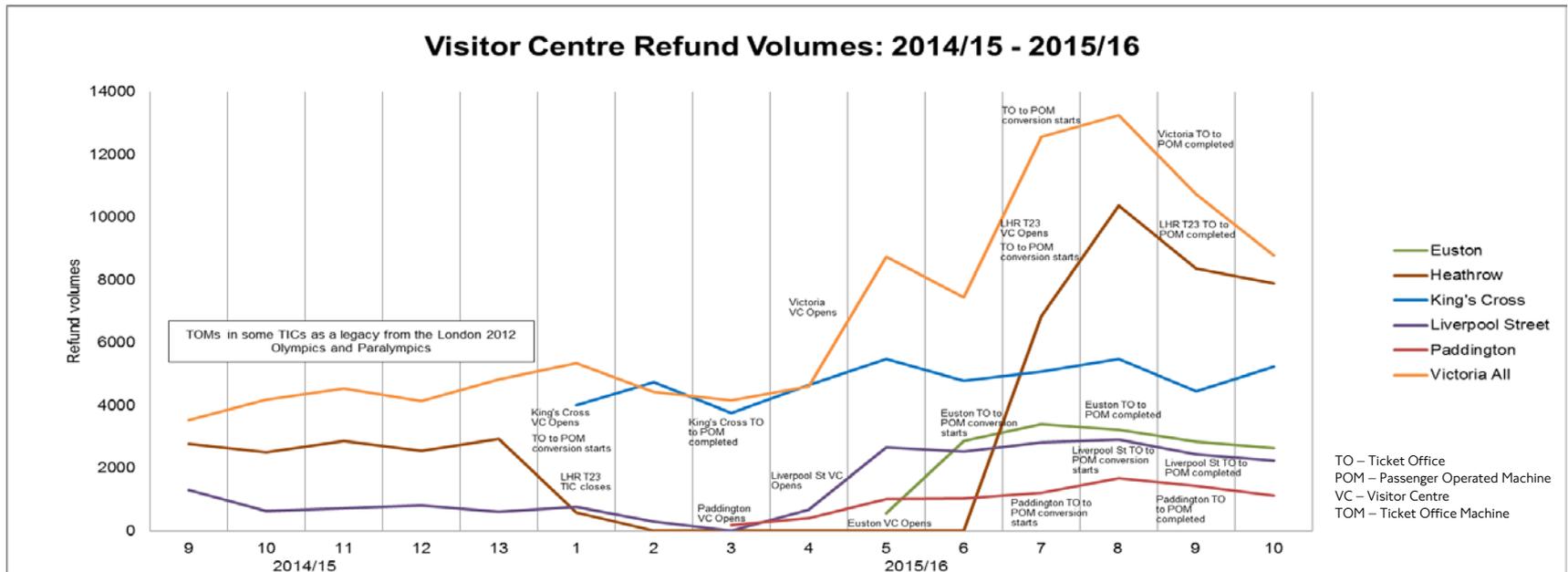
- Overall visitor satisfaction score has risen to 92, considered to be excellent service by customers
- All individual customer satisfaction measures have increased since the transformation from the TICs. These cover customer service levels, provision of information, range of products and the physical appearance of the Visitor Centres
- Visitor experience at Gateway stations is significantly improved when they use a Visitor Centre
- Improvements being made as part of Fit for the Future - Stations, such as the introduction of CSAs and creation of clearly demarcated information points, will have a positive impact on the overall visitor experience in the ticket hall



# TIC to Visitor Centre transition period reflected in customers behaviour patterns

Comparison between Visitor Centre and TIC customer transactions\*:

- Value of TfL 'tickets' sales has remained consistent except for Period 10 that saw a 62% increase at the beginning of the calendar year, indicating that some commuters are still using the Visitor Centres to renew season tickets
- For the first time all Visitor Centres can carry out refunds and therefore refund volumes have increased significantly, in particular during the ticket office to ticket machine works. However refund volumes now appear to be declining
- Initial refund volumes could be a contributing factor to lower than expected third party tourist sales



\* 2013/14 data used for TIC sales comparison due to centre closures in 2014/15 associated with the transformation building works



# Next steps: support roll out of Station Operating Model and consolidate role of the Visitor Centres

- Continue to provide coordinated customer service with London Underground staff as the Fit for the Future Station Operating Model is rolled out
- Work with London Underground to ensure ticket machine and Visitor Centres refund options are used effectively and refund volumes are manageable for the Visitor Centres
- Greater promotion of the Visitor Centre network through improvements to the TfL website and prominent inclusion in offline collateral, such as the Visiting London leaflet. Increase profile through tourism partners, such as London & Partners
- Deliver new Commercial Strategy to reduce operating costs

