

LONDON VISITOR SURVEY

Annual Report 2008
January – December

*Prepared for the London Development Agency by
TNS Travel & Tourism*

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Introduction

About the London Visitor Survey

The London Visitor Survey (LVS) is designed to improve understanding of the London visitor experience. It aims to identify the strengths and weaknesses of London as a visitor destination and to track visitor satisfaction with the capital over time. This is achieved through face to face interviews with both international and domestic visitors to the capital.

The survey began in September 2006 and has been contracted to TNS until March 2010, with approximately 5,000 interviews being conducted per calendar year. Interviewing is conducted throughout the year at various sample points around London, with slightly larger sample sizes in the summer months.

By rotating sample points around central and outer parts of London, the survey aims to capture information from a range of different types of visitors. Those on leisure trips, business trips and visits to friends and relatives are all important components of tourism in the capital.

The results for London as a whole are available in quarterly reports. Bespoke information from the survey is available on request, subject to the statistical robustness of data.

Visitor definitions used throughout this report

The London Visitor Survey is conducted among the following visitor types:

- **Overseas** visitors
- **UK staying visitors** (UK residents who live outside Greater London and are staying at least one night in the capital)
- **Day visitors** (those on trips of 3hrs+ not taken on a regular basis), including:
 - **UK day visitors** (UK residents who live outside Greater London and are not staying overnight)
 - **London residents** (live in one of the 33 London boroughs)

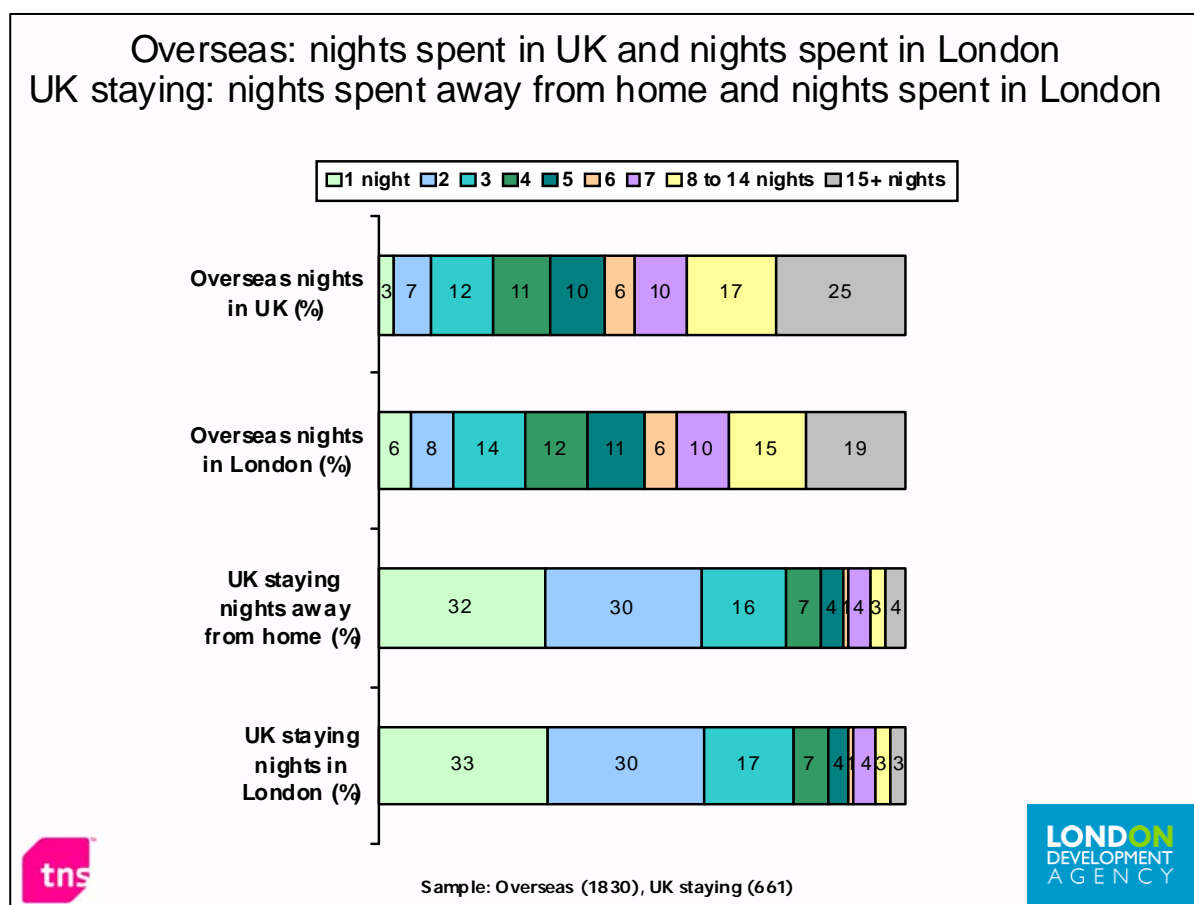
This report is based on data collected from 4587 visitors to London, which represents the total sample in 2008.

Summary of Results

- More than a third of overseas visitors stayed in London for 8 or more nights, with an additional 16% staying for 6 or 7 nights. In contrast, UK staying visitors stayed for shorter periods, with four out of five of these visitors spending 3 nights or less in London.
- As would be expected, repeat visits to London were much more likely amongst UK visitors. Almost half of UK staying visitors and nearly two thirds of UK day visitors indicated they had visited London more than 10 times in the past 5 years, whereas for almost half of overseas visitors (46%), it was their first visit.
- More than two thirds of UK day visitors (68%) and 72% of London residents were visiting the capital on a holiday/leisure trip. Similarly, this was the primary purpose of the visit for both overseas and UK staying visitors (62% and 52% respectively).
- Among overseas visitors, the most common form of accommodation was staying with a friend (23%), followed by staying with relatives (17%) and in 3* hotels (16%). Among UK staying visitors, 32% stayed with a friend while in London, ahead of staying with relatives (23%).
- The train was the most frequently used mode of transport to and from London among both UK staying visitors and UK day visitors. Once in London, the Underground/DLR was the main mode of transport, regardless of visitor type.
- History/heritage was the most influential reason for choosing to visit London among all visitor types, with the exception of London residents who were most strongly motivated by parks and gardens.
- Overall, knowledge from a previous trip was the most frequently used source of pre-trip information. Once in London, guidebooks/maps were the most commonly used source of information.
- Overall visitor satisfaction was high, with just under three quarters of all those surveyed (71%) rating London as either excellent or very good as a place to visit.
- Additionally, around 65% of visitors rated the capital as either excellent or very good in comparison with other key destinations. In terms of repeat visits, 66% indicated that they would definitely visit the capital again, while 74% said they would definitely recommend London to others.
- The average total expenditure per person (excluding accommodation) in the 24 hours prior to interviews taking place was £85 for overseas visitors, £81 for UK staying visitors, £63 for UK day visitors and £46 for London residents.

Trip information

Length of stay in the UK/Length of stay in London



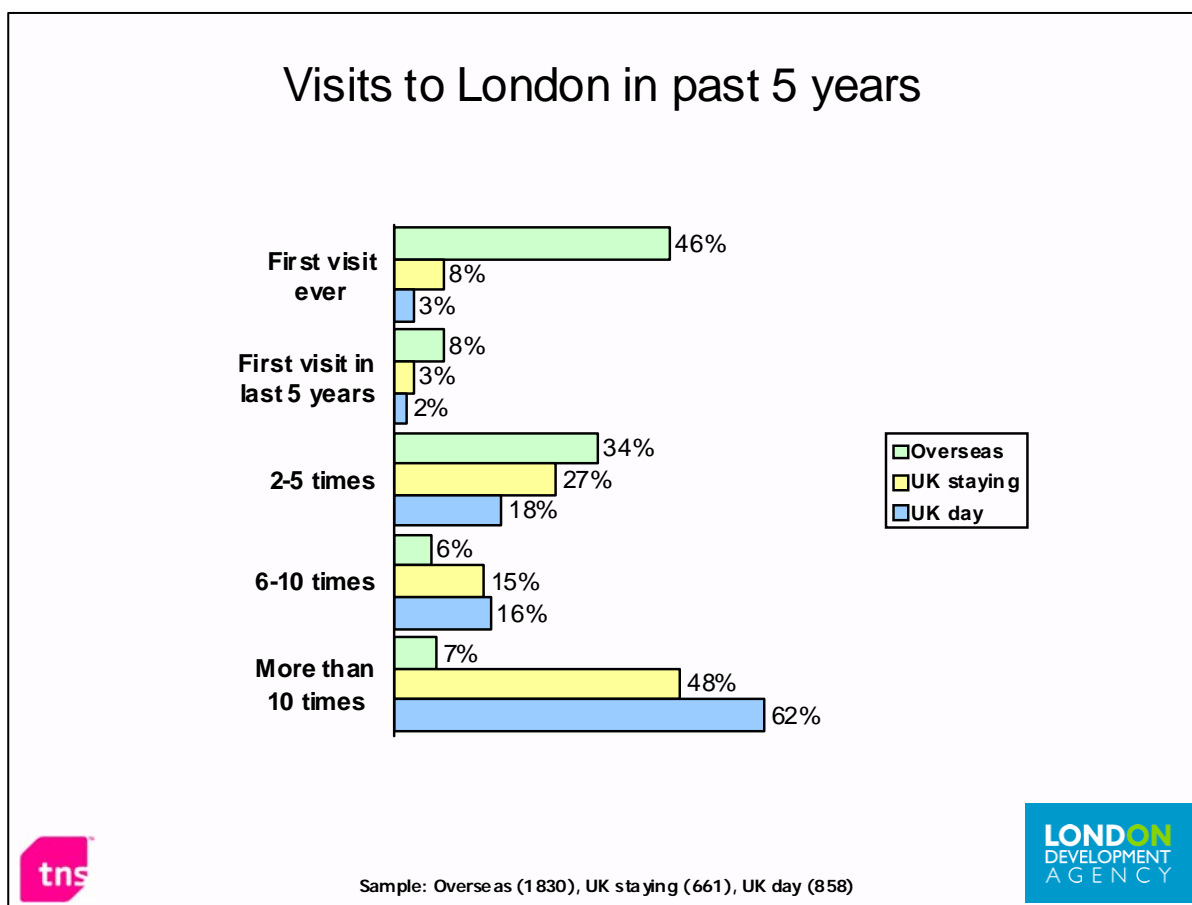
The length of stay *in the UK* among overseas visitors to London was quite variable, with around a quarter in each of the following categories – **1-3 nights**, **4-6 nights**, **7-14 nights** and **more than 14 nights**.

There was a similar pattern for the length of stay *in London* but with a higher proportion staying for **1-3 nights** (28%) and also for **4-6 nights** (29%) with around 1 in 5 (19%) staying in London for **longer than 14 nights**.

Among UK staying visitors, the trend for shorter trips was much stronger, with more than three quarters staying away from home between **1 and 3 nights** (78%).

Results for their length of stay in London were very similar, highlighting that the capital is predominantly a short break destination for the UK domestic market, with 80% of these visitors staying for **1 to 3 nights**.

Previous visits



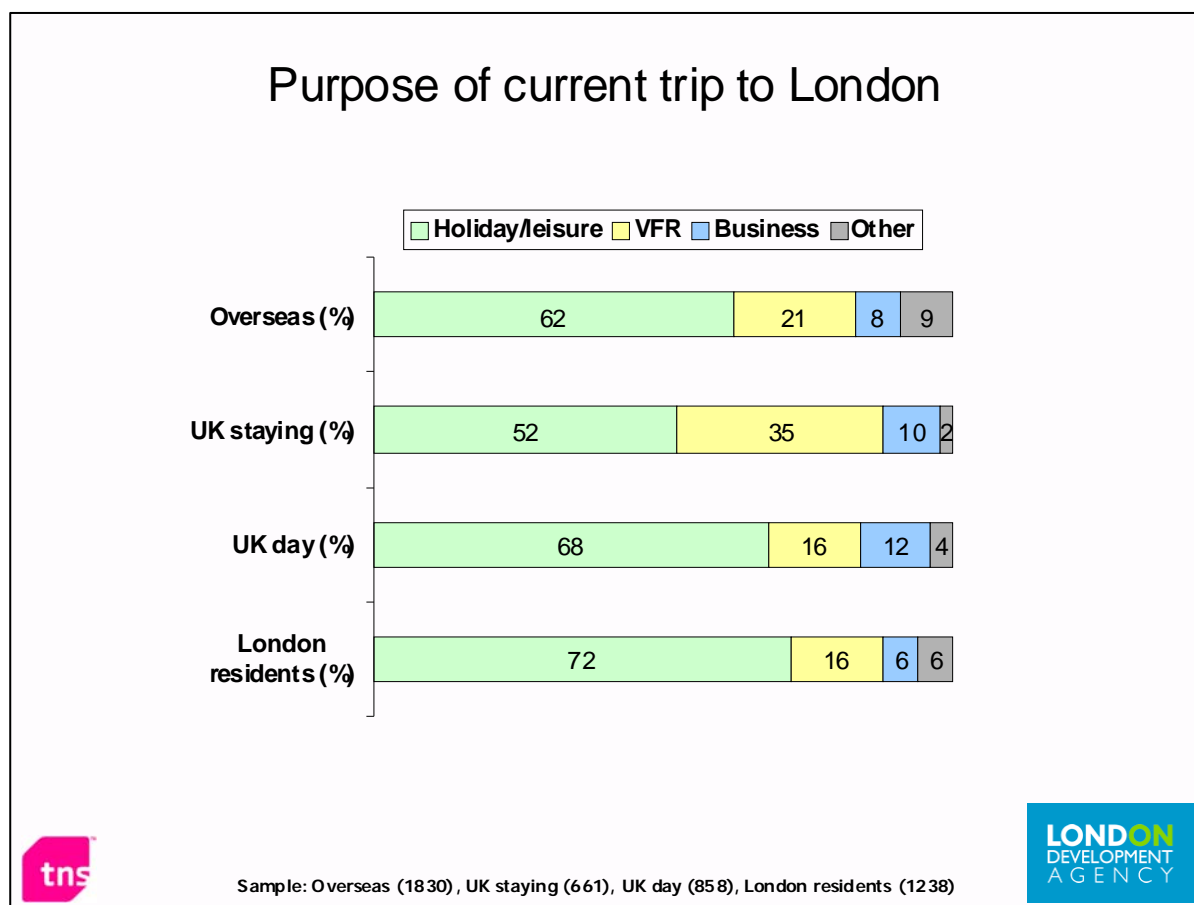
Among overseas visitors, 54% were **first-timers** (including those who had not visited in the last 5 years). **Repeat visitors**, who had made at least one previous visit in the past 5 years, accounted for 47% of the sample.

Repeat trips among UK staying visitors were high. Just under half (48%) had visited London **more than 10 times in the last 5 years**. Another 15% had stayed between **6 and 10 times in the last 5 years**, while just over a quarter (27%) had visited between **2 and 5 times in the last 5 years**.

In the UK day visitor segment, just under two thirds (62% - down from 69% a year ago) had visited London **more than 10 times in the last 5 years**. A further 16% had stayed between **6 and 10 times in the last 5 years**. Around 18% of UK day visitors had been to the capital between **2 and 5 times in the last 5 years**.

Please note: London residents were not asked this question.

Trip purpose



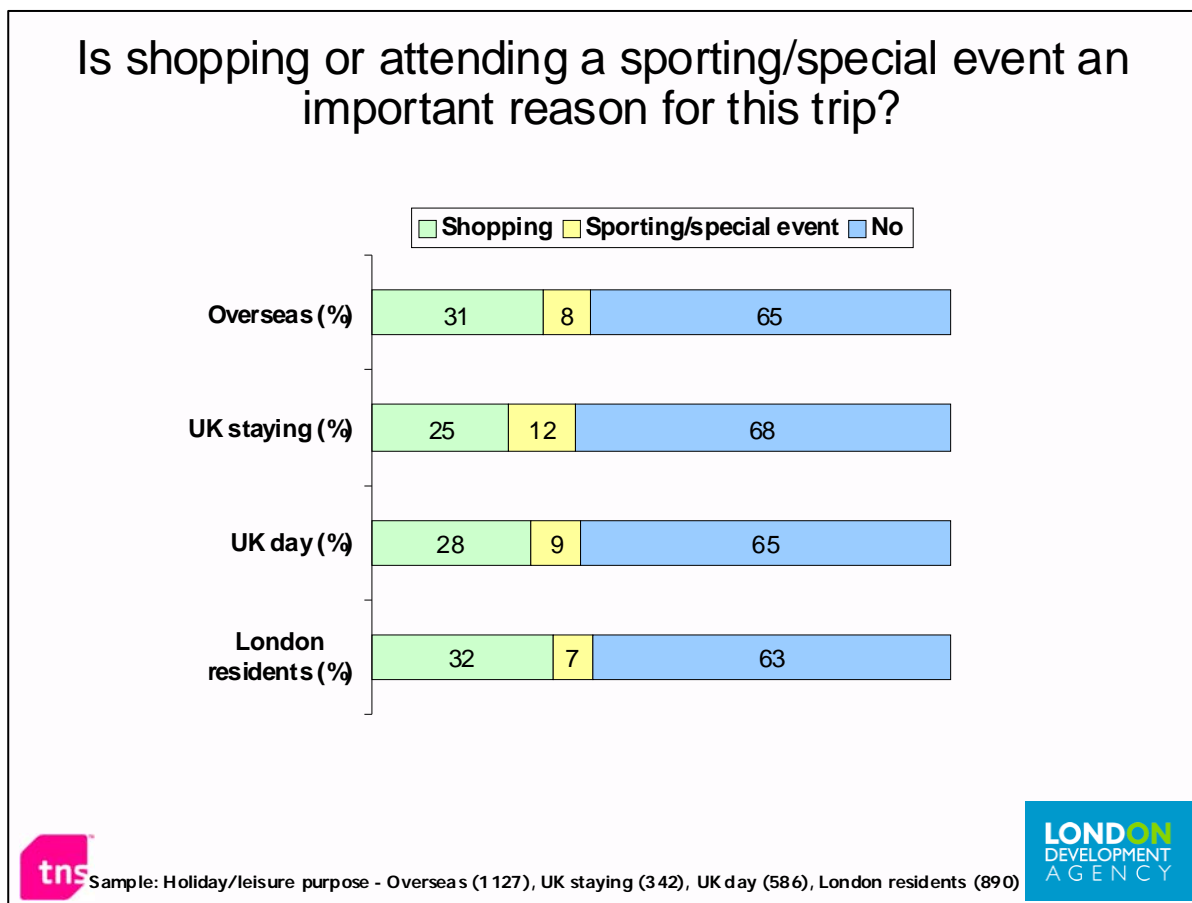
The majority of overseas visitors were in London for **holiday/leisure** reasons (62%). Just over a fifth (21%) were **visiting friends and relatives**, while 8% were in the capital on **business**.

The most common purpose of trip among UK staying visitors was **holiday/leisure** (52%), ahead of **visiting friends and relatives** (35%) and **business** (10%).

Among UK day visitors, the main purpose for their visit to London was **holiday/leisure** reasons (68%), followed by **visiting friends and relatives** (16%) and **business** (12%). London residents were predominantly visiting other parts of the capital for **leisure** (72%).

Please note: due to the methodology used in this survey and the selection of interview locations being skewed towards 'leisure' locations, it is very likely that the 'true' proportion of business visitors is under-estimated.

Holiday/leisure – shopping or sporting/special event



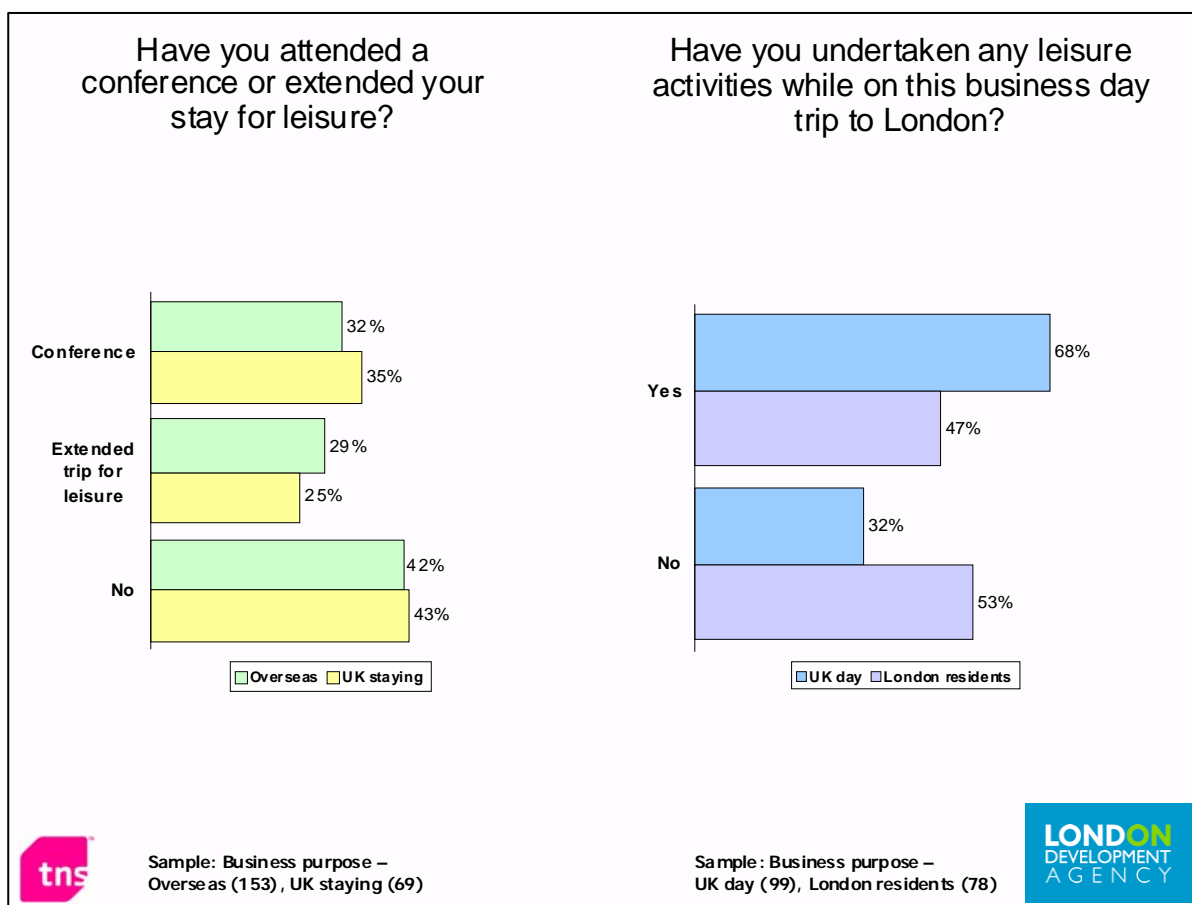
Among overseas visitors in London for **holiday/leisure** purposes, 31% indicated that **shopping** was a key reason for visiting the capital, while 8% stated that attending a **sporting or special event** was a strong motivator for their trip.

For a quarter of UK staying visitors (25%), **shopping** was an important part of their trip. Around 12% highlighted that attending a **sporting or special event** was a key driver behind their current visit to London.

Shopping was a strong reason for visiting London among 28% of UK day visitors, whereas 9% of this segment said that attending a **sporting or special event** was an important part of their trip.

Among London residents, just under a third (32%) stated that **shopping** was an important reason for their trip, while 7% mentioned that a **sporting or special event** was a key motivator.

Business purpose trip – leisure extension

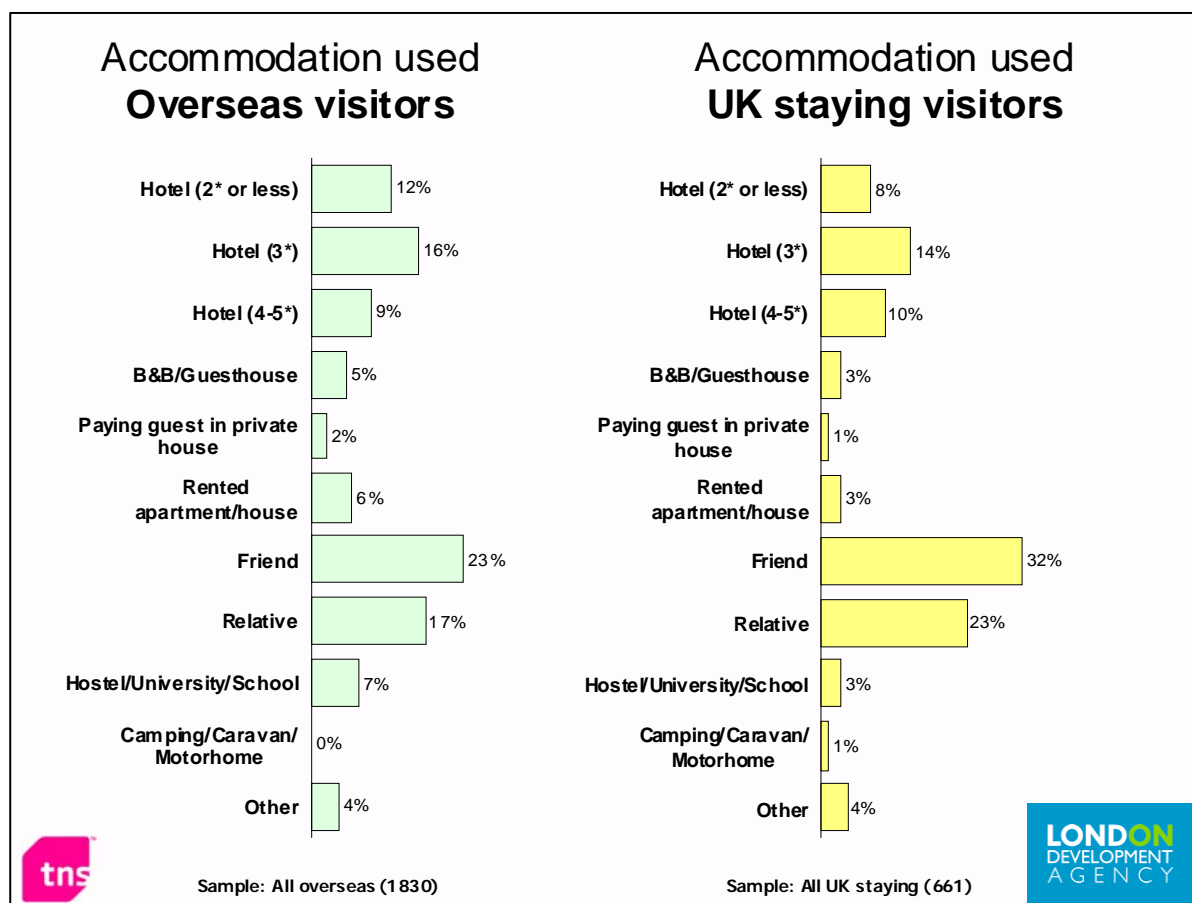


Just under a third of overseas business visitors (32%) were attending a conference during the current trip to London. The comparative figure among UK staying business visitors was 35%.

Around 29% of overseas business visitors had extended their stay in the capital for leisure purposes, while a quarter of UK staying business visitors (25%) extended their trip.

In terms of UK day visitors, more than two thirds (68%) undertook leisure activities during their business day trip. In contrast, the corresponding figure among London residents was 47%.

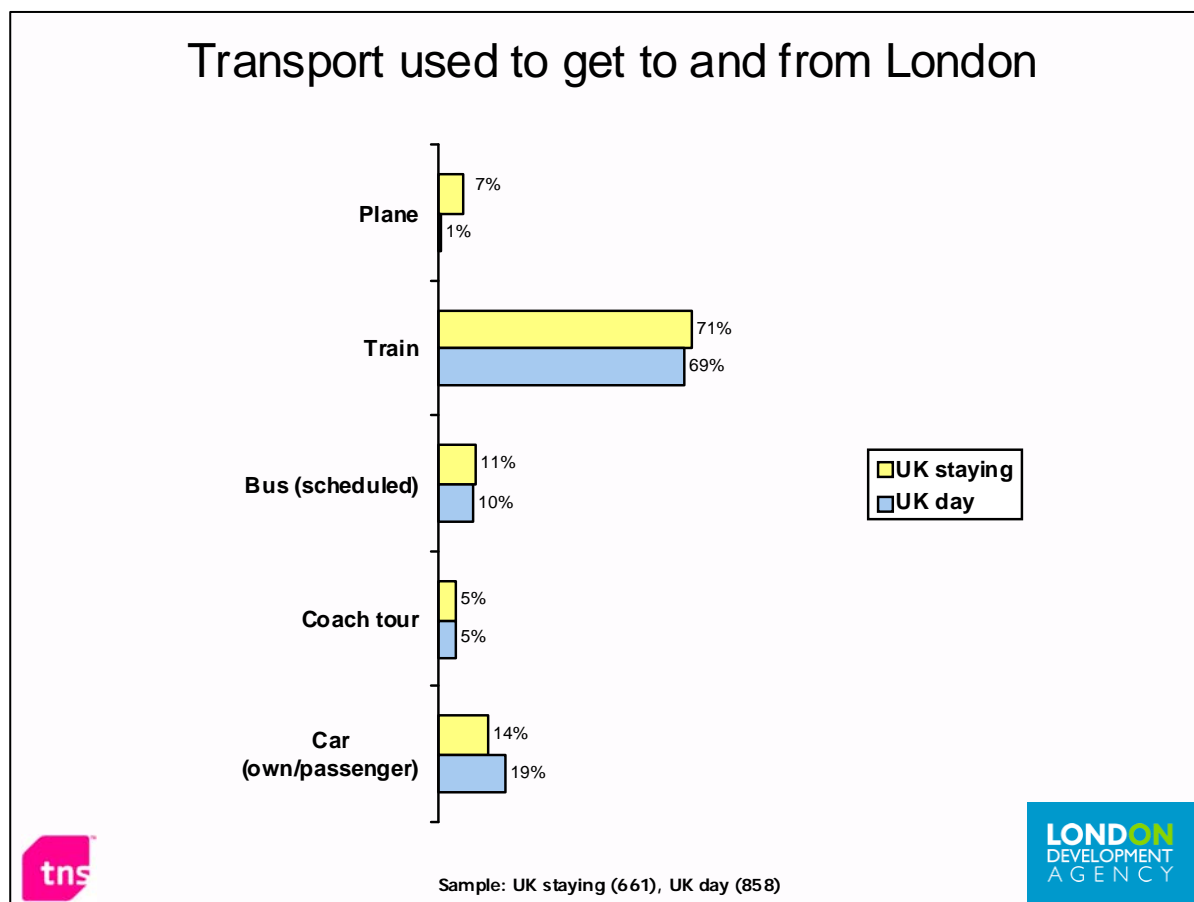
Accommodation



Among overseas visitors, just under a quarter (23%) stayed with a **friend** during their trip to London. The next most used form of accommodation was to stay with a **relative** (17%), just ahead of **3* hotels** at 16%. Around 12% of overseas visitors stayed in a **2* hotel** while in London, and a further 9% stayed in a **4-5* hotel**.

Almost a third of UK staying visitors (32%) stayed with a **friend** while visiting the capital, followed by those who stayed with a **relative** (23%). The next most frequently used forms of accommodation were **3* hotels** (14%), **4-5* hotels** (10%) and **2* hotels** (8%).

Transport – to and from London



The **train** was by far the most frequently used mode of transport to and from London among both UK staying visitors (71% - 10% higher than a year ago) and UK day visitors (69%).

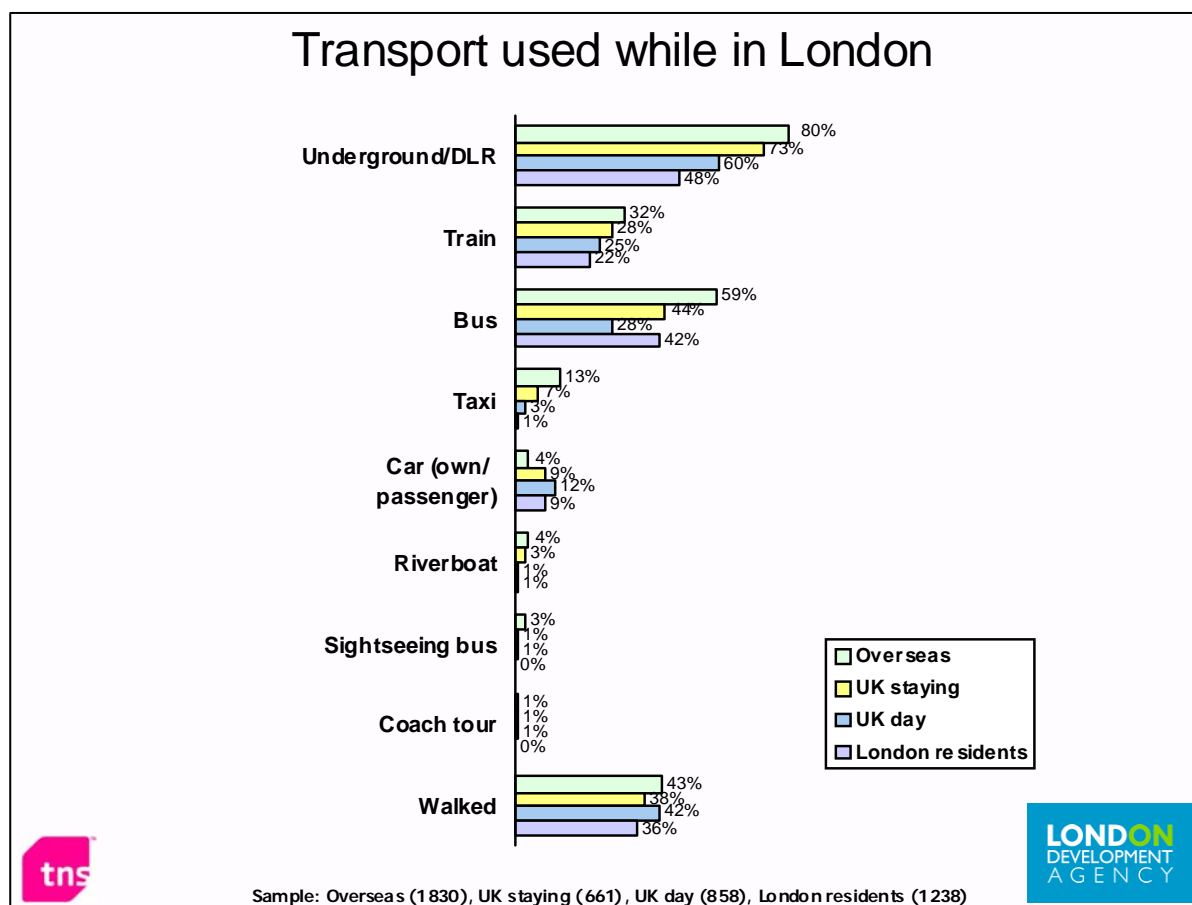
For UK staying visitors, the next most commonly used transport mode to and from the capital was by **car (their own or as a passenger)** (14%, down from 22%), followed by a **scheduled bus service** (11%), **plane** (7%) and **coach tour** (5%).

Among UK day visitors, after the train, the next most used mode of transport to and from London was by **car (their own or as a passenger - 19%)**. **Scheduled bus service** and **coach tour** were used by 10% and 5% respectively, while 1% travelled to London by plane.

Information on the arrival points of overseas visitors can be found in Appendix - Visitor Profiles.

Please note: This question was asked of all UK residents (excluding London residents).

Transport – in London



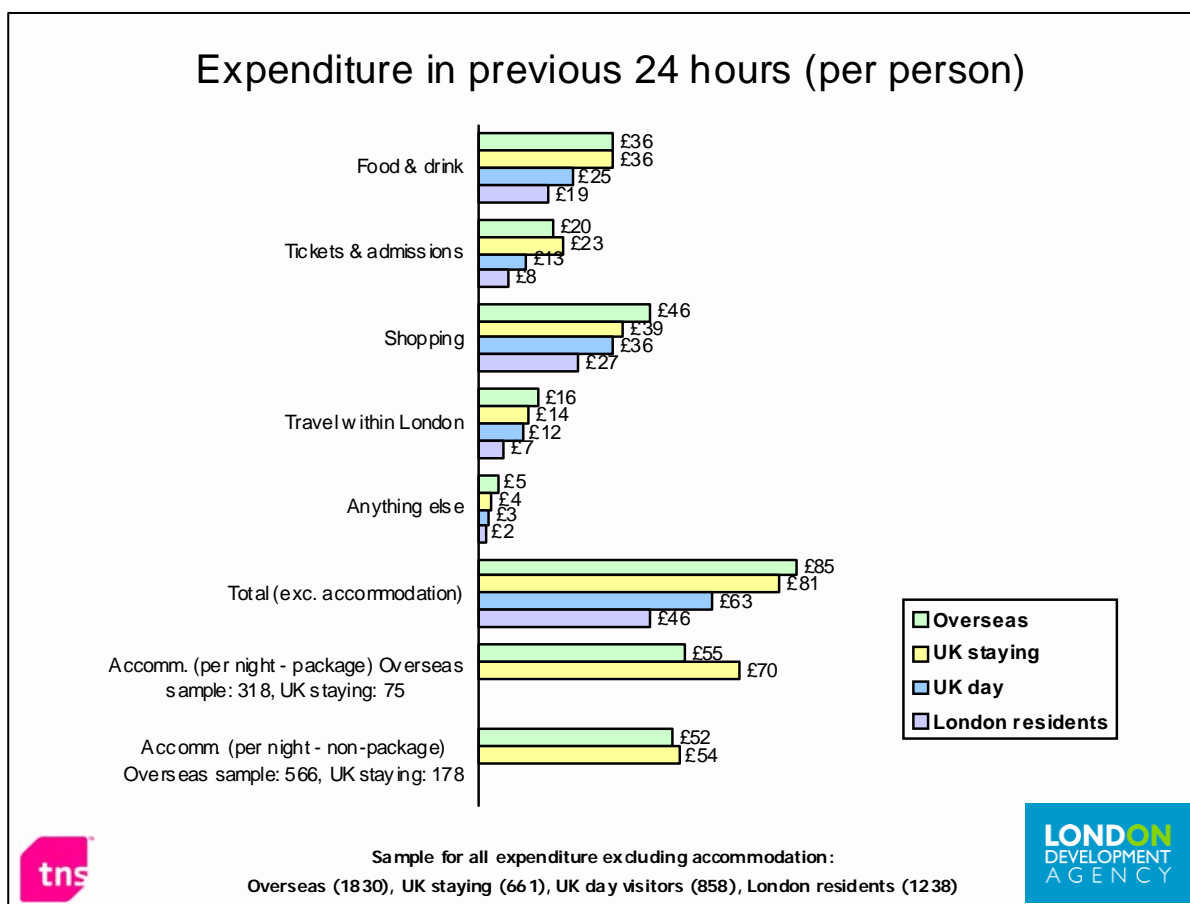
The **Underground/DLR** was the most commonly used mode of transport among all types of visitors. Overseas visitors were most likely to do so - used by 80%, followed by UK staying visitors at 73%. Around 60% of UK day visitors used this mode of transport when in London, while the comparative figure for London residents was 48%.

The next most frequently used modes of transport among overseas visitors were **bus** (59%), **walking** (43% - up from 36% in 2007), **train** (32%) and **taxi** (13%).

Among UK staying visitors, the next most used modes of transport were **bus** (44%), **walking** (38% - up from 29%), **train** (28%) and **car (their own or as a passenger)** at 9%. For UK day visitors, after the **Underground/DLR**, the next most commonly used modes of transport were **walking** (42% - a 10% increase), **bus** (28%), **train** (25%) and **car (their own or as a passenger)** at 12%.

Among London residents, the next most preferred modes of transport were **bus** (42%), **walking** (36% - up from 27%), **train** (22%) and **car (their own or as a passenger)** at 9%.

Expenditure



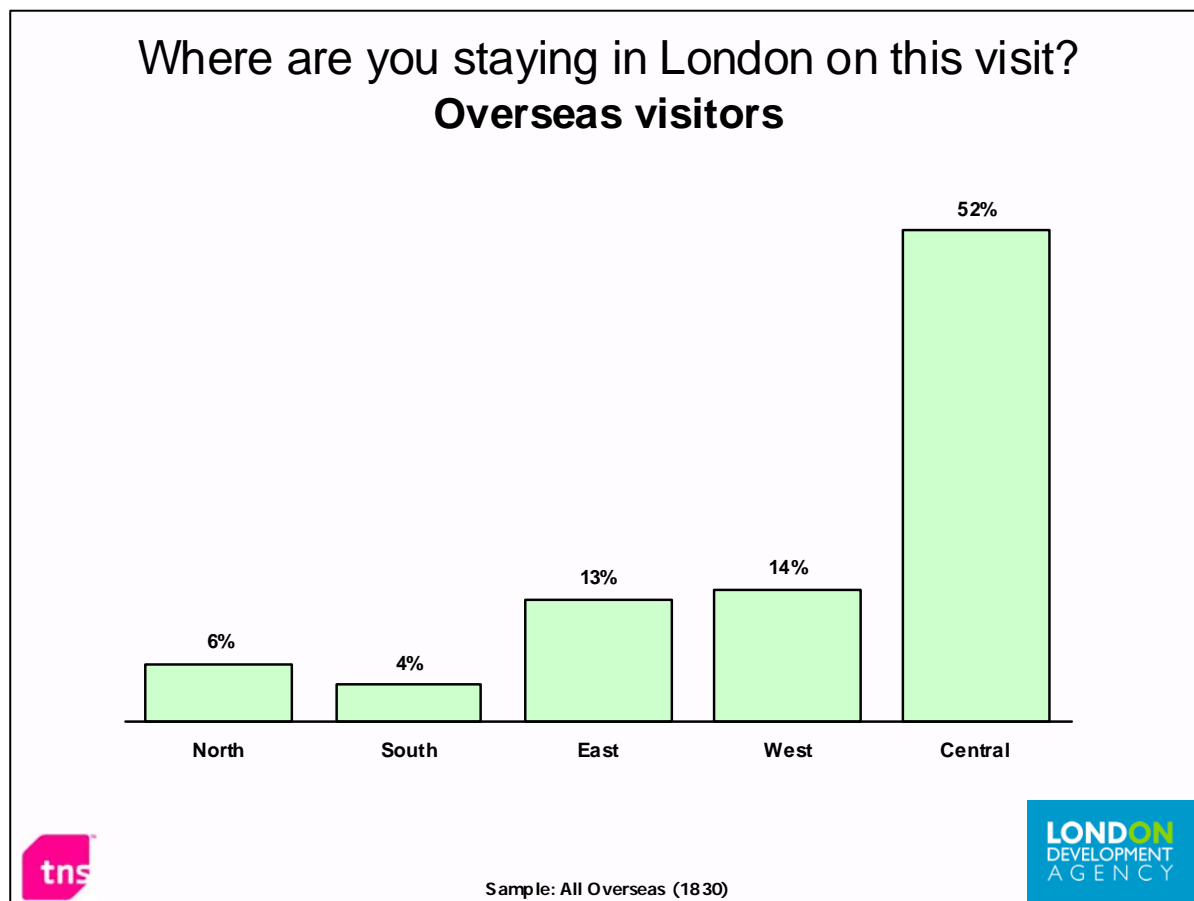
Average **total expenditure** per person (in the previous 24 hours' period and excluding accommodation) was higher for staying visitors than for day visitors. Overseas visitors spent the most (£85), ahead of UK staying visitors (£81), UK day visitors (£63) and London residents (£46).

The average daily expenditure on **food and drink** ranged from £19 for London residents to £36 for both overseas visitors and UK staying visitors. UK staying visitors spent the most on **tickets and admission to entertainment/attractions** (£23 per person on average), ahead of overseas visitors (£20), UK day visitors (£13) and London residents (£8).

In terms of **shopping**, the average daily expenditure ranged from £27 for London residents to £46 for overseas visitors. Expenditure on **travelling within London** ranged from £7 for London residents to £16 for overseas visitors.

Accommodation costs for those on package trips averaged £55 per person per night for overseas visitors and £70 for UK staying visitors. **Accommodation** costs (excluding those on package trips) averaged £52 per person per night for overseas visitors and £54 for UK staying visitors.

Where are you staying in London? (sub-region)

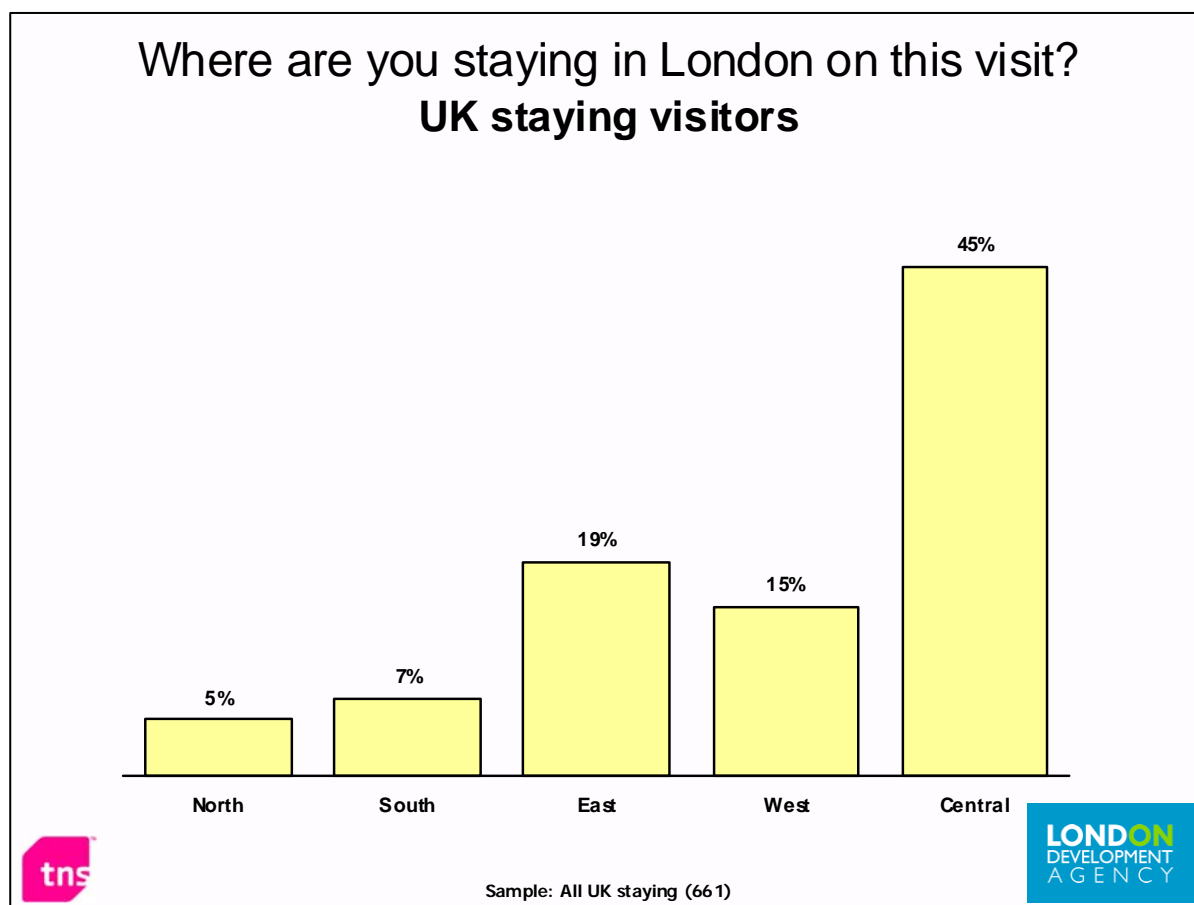


All overseas visitors were asked where they were staying in London. The results are shown for the various sub-regions.

As would be expected, there was a marked bias towards Central London, with more than half of overseas visitors (52%) staying in that area. West London accounted for 14% of overseas visitor stays, followed by East London (13%), North London (6%) and South London (4%).

Please note: A minority of responses (10%) were coded as 'Other' due to respondent providing insufficient information to allow accurate classification of the location.

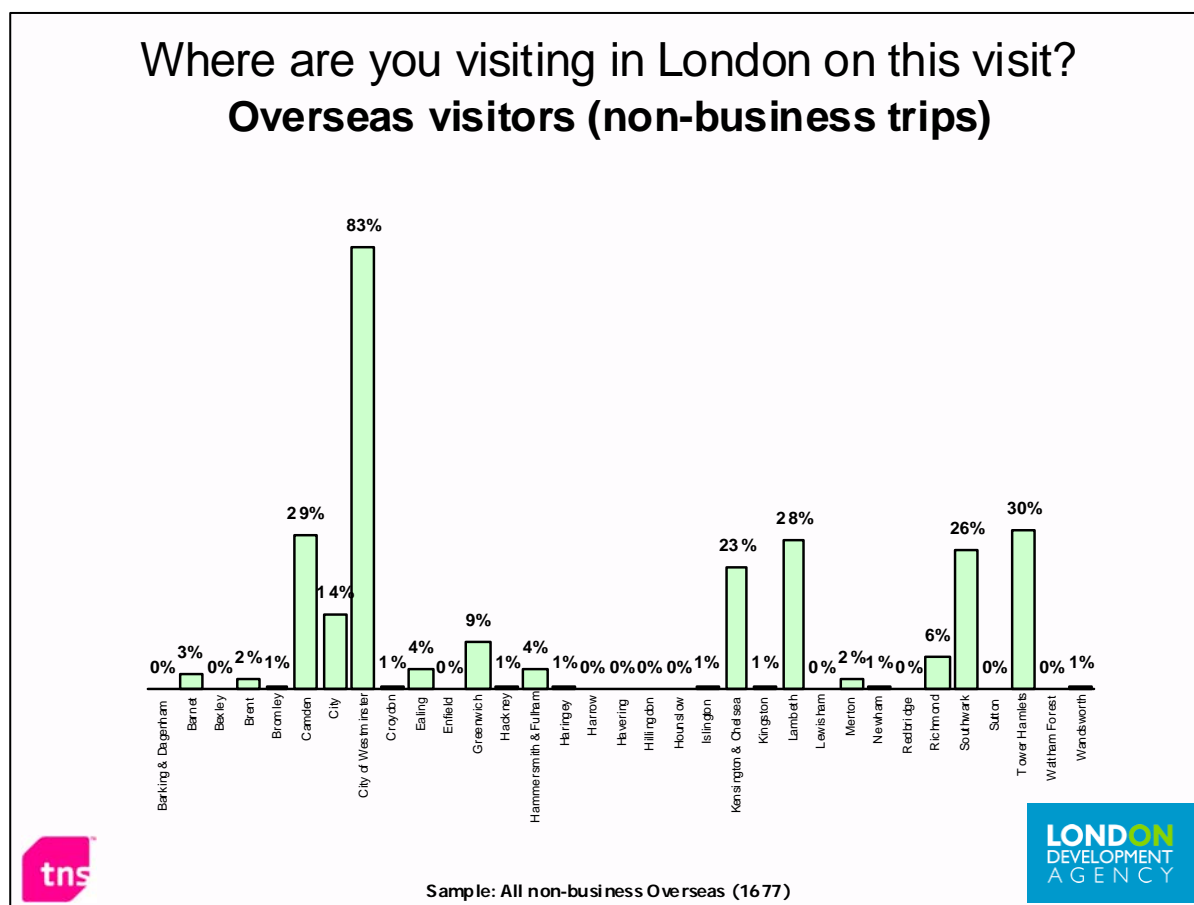
Where are you staying in London? (sub-region)



All UK staying visitors were also asked where they were staying in London. Once again, Central London was most frequently mentioned, with 45% of UK visitors staying in this area. East London was the next most commonly mentioned region (19%), followed by West, South and North London (15%, 7% and 5% respectively).

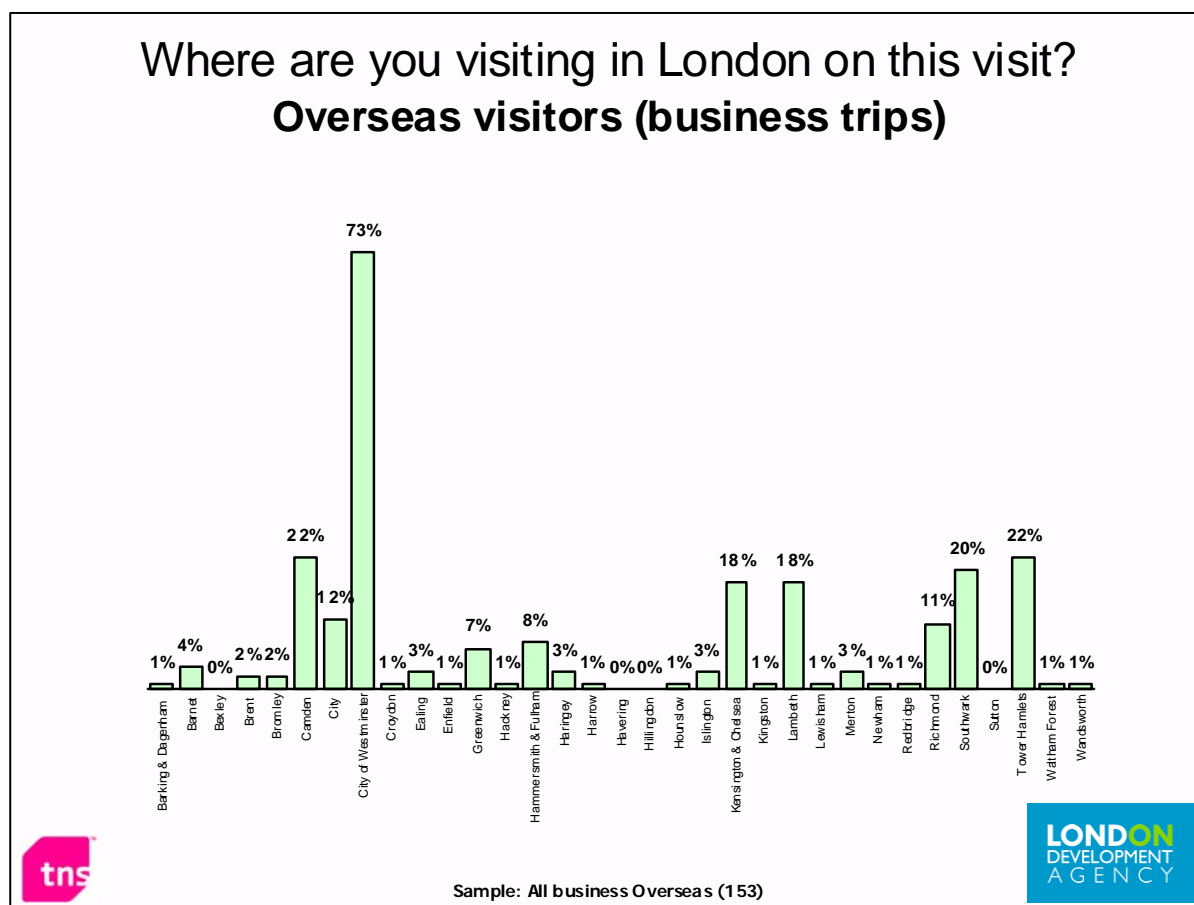
Please note: A minority of responses (8%) were coded as 'Other' due to respondent providing insufficient information to allow accurate classification of the location.

Where are you visiting in London? (borough)



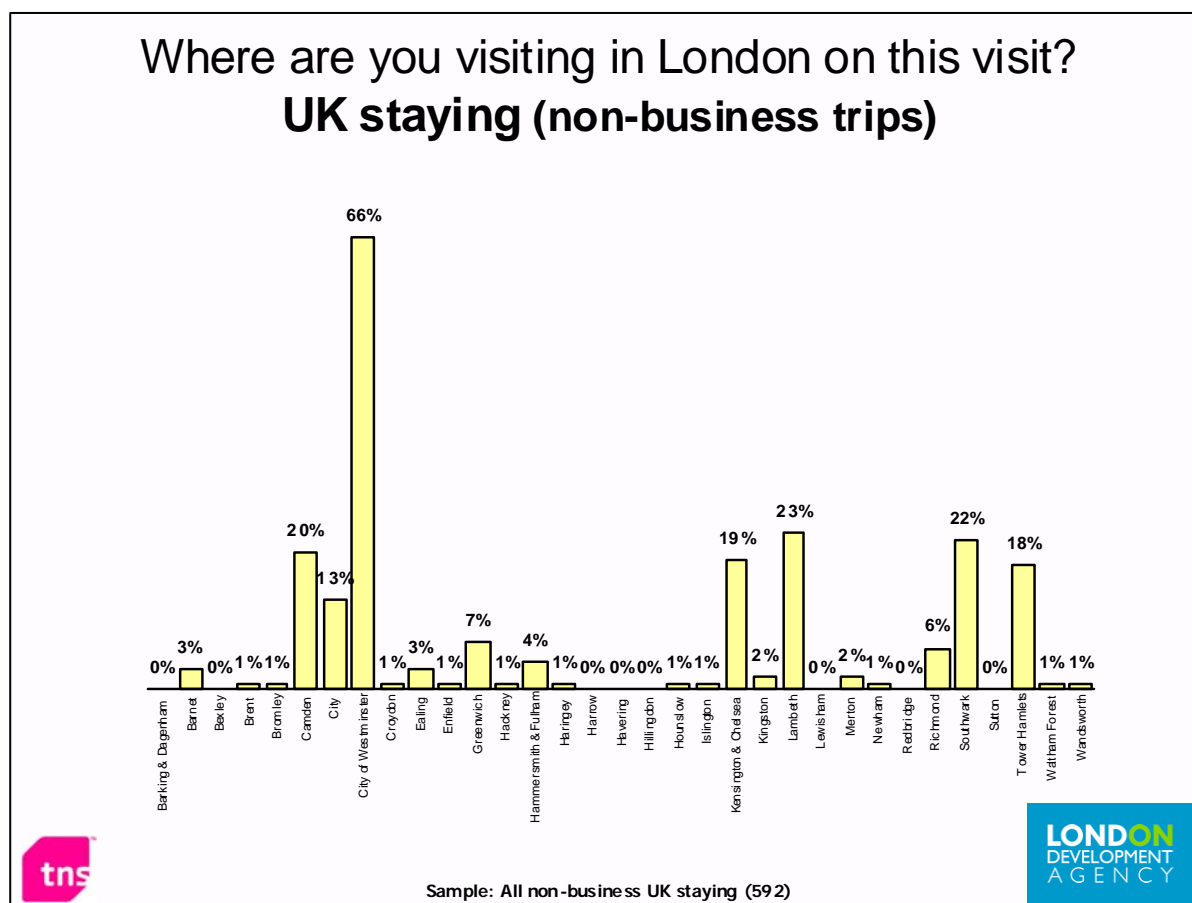
Overseas visitors (except those on business trips) were asked to name all the places they had visited and intended to visit in London during their stay. When results are examined by borough, Westminster was the most commonly mentioned, and by a large margin from all the others (83%). Other frequently mentioned boroughs were Tower Hamlets, Camden, Lambeth, Southwark and Kensington & Chelsea - all were mentioned by at least 20% of visitors. Apart from the City of London at 14%, no other borough was mentioned by more than 10% of overseas visitors.

Where are you visiting in London? (borough)



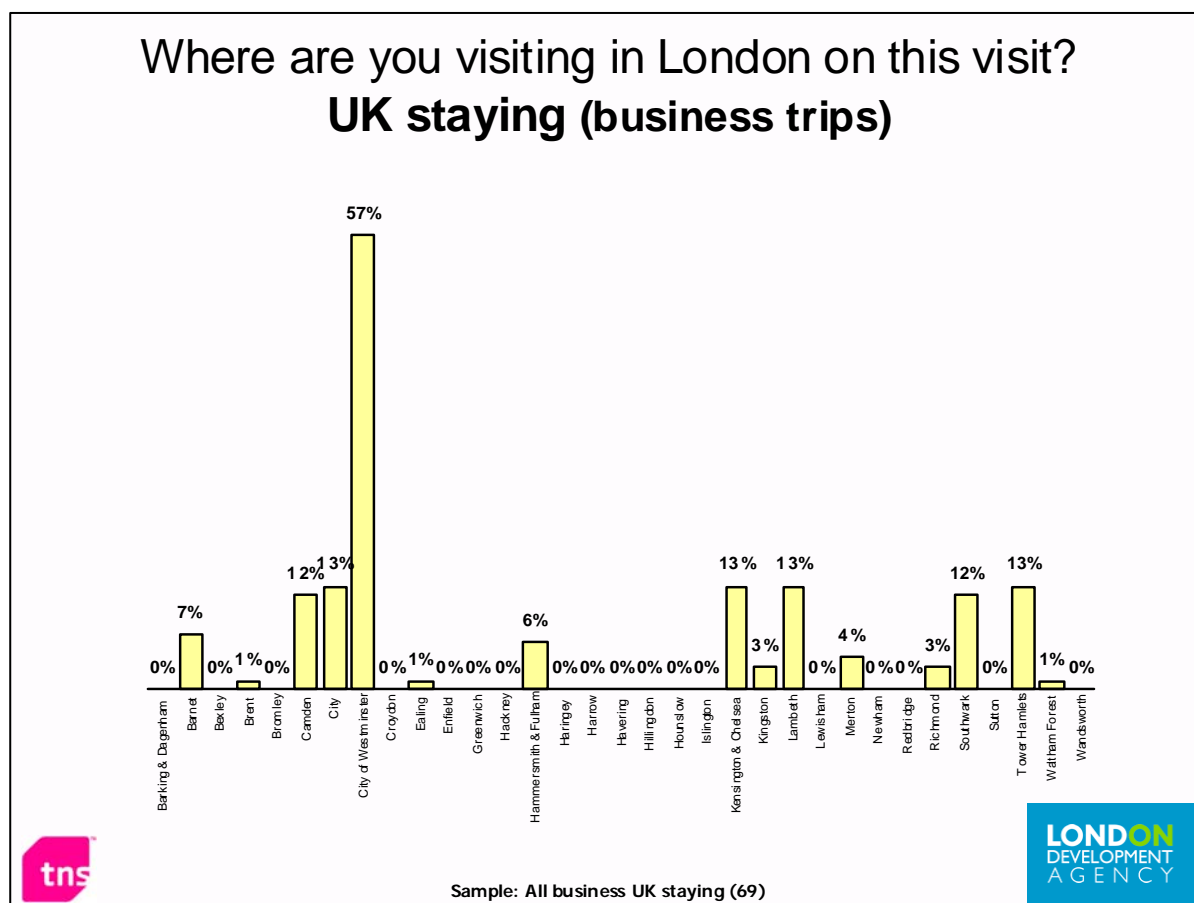
Overseas visitors on business trips were asked to name all the places they had visited and intended to visit in London during their visit. At 73%, Westminster was the predominant borough visited. Other popular boroughs were Camden (22%), Tower Hamlets (also 22%), Southwark (20%), Kensington & Chelsea and Lambeth (both 18%).

Where are you visiting in London? (borough)



UK staying visitors (except those on business trips) were asked to name all the places they had visited and intended to visit in London during their visit. The results are shown by borough, with Westminster by far the most frequently mentioned (66%). Other popular boroughs were Lambeth (23%), Southwark (22%), Camden (20%), Kensington & Chelsea (19%), Tower Hamlets (18%) and City of London (13%). All other boroughs were mentioned by less than 10% of these visitors.

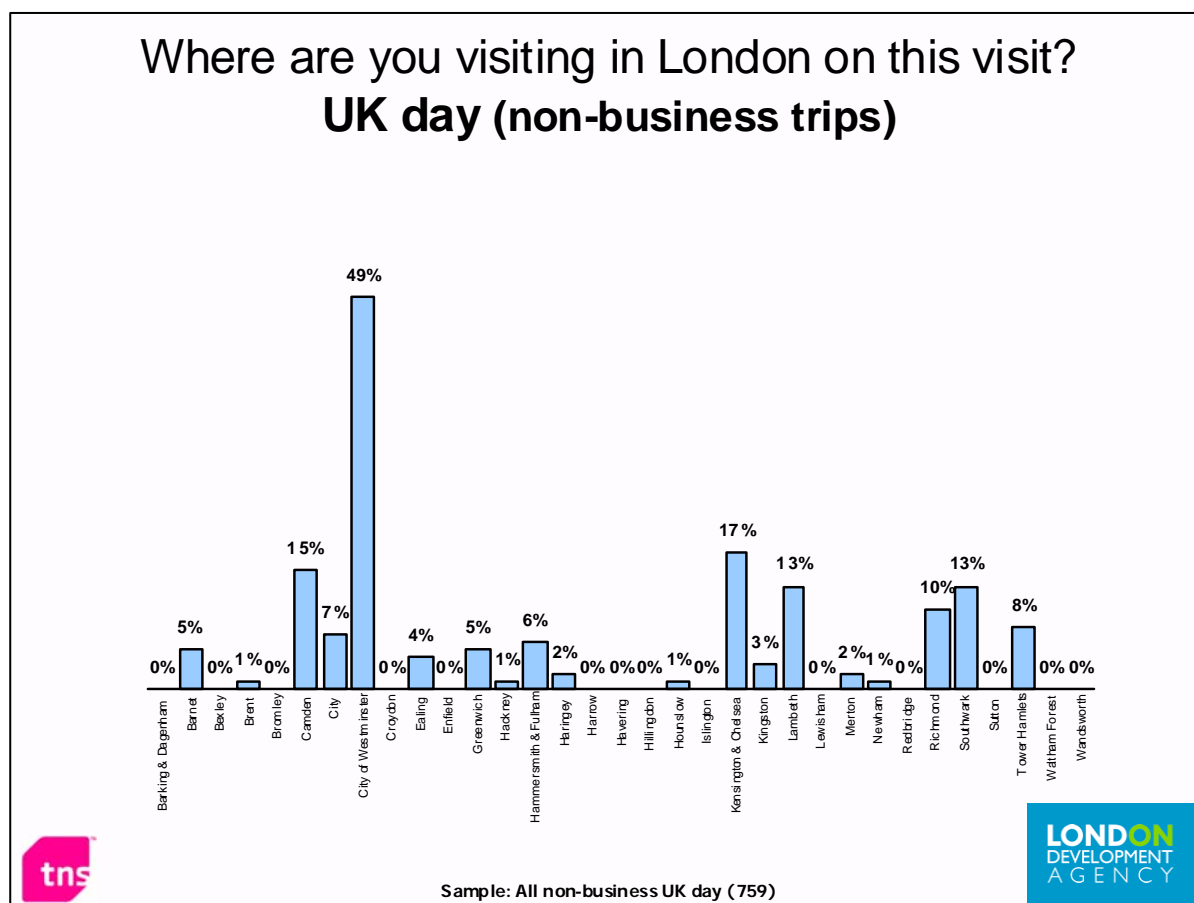
Where are you visiting in London? (borough)



UK staying visitors on business trips were asked to name all the places they had visited and intended to visit in London during their visit. The results are shown by borough. Westminster was mentioned by more than half of UK staying visitors who were in London on business (57%). The only other boroughs with mentions of more than 10% were City of London, Kensington & Chelsea, Lambeth, Tower Hamlets (all 13%) and Camden and Southwark (both 12%).

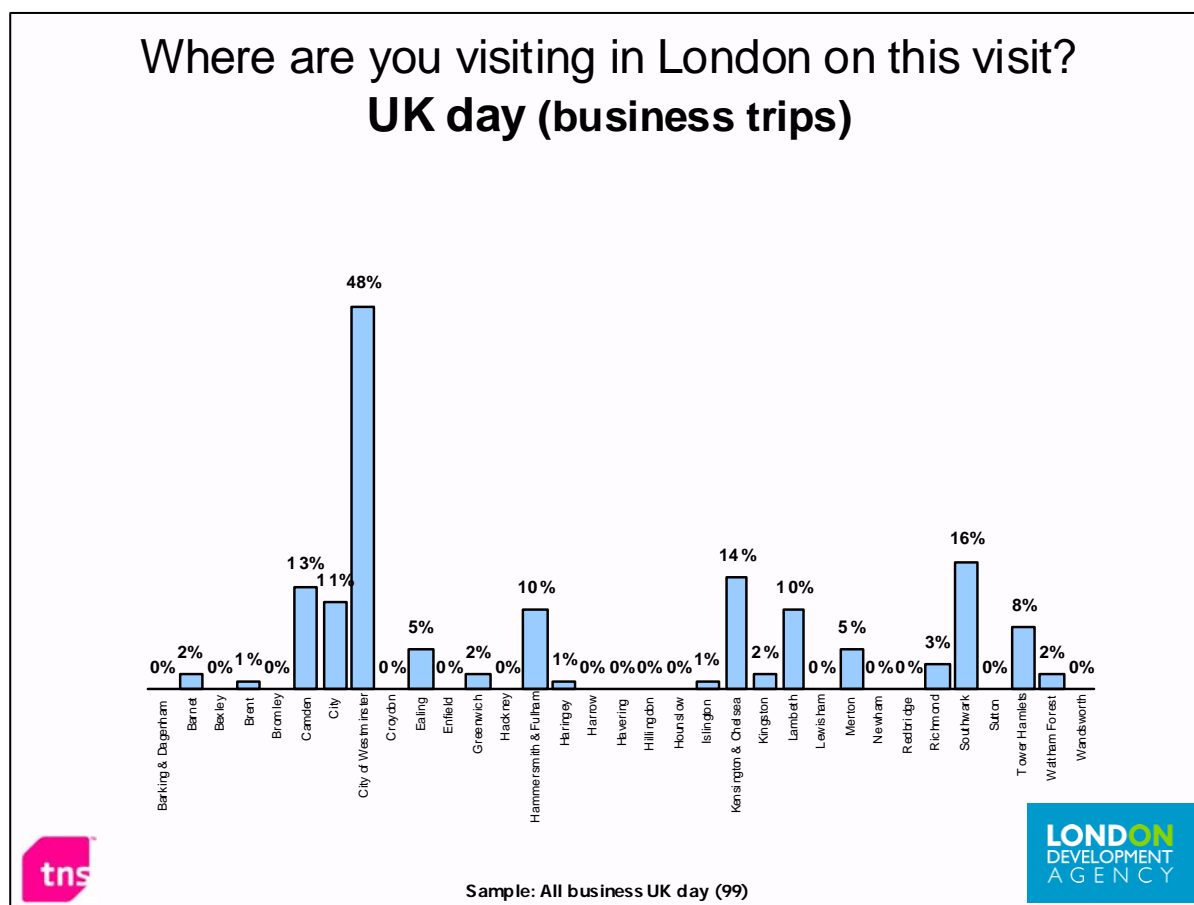
Please note: small sample size

Where are you visiting in London? (borough)



UK day visitors (except those on business trips) were asked to name all the places they had visited and intended to visit in London during their visit. The results are shown by borough. As expected, Westminster was by far the most frequently mentioned borough at 49%. Other popular boroughs mentioned by visitors were Kensington & Chelsea (17%), Camden (15%), Lambeth (13%), Southwark (also 13%) and Richmond (10%). All other boroughs were mentioned by less than 10% of visitors.

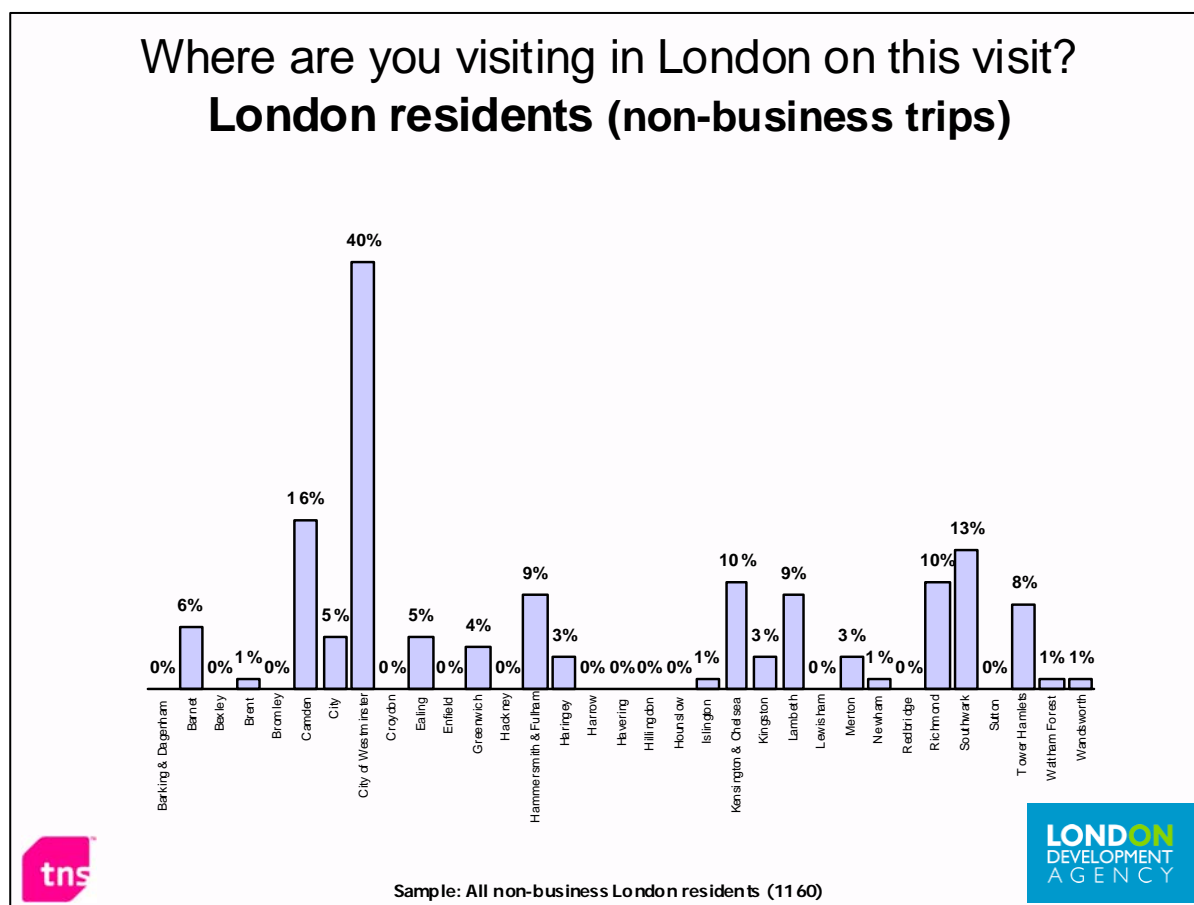
Where are you visiting in London? (borough)



UK day visitors on business trips were asked to name all the places they had visited and intended to visit in London during their visit. The results are shown by borough. At 48%, Westminster was by far the most frequently mentioned borough. Other popular boroughs mentioned by UK business day visitors were Southwark (16%), Kensington & Chelsea (14%), Camden (13%), City of London (11%), Hammersmith & Fulham and Lambeth (both 10%). All other boroughs were mentioned by less than 10% of visitors.

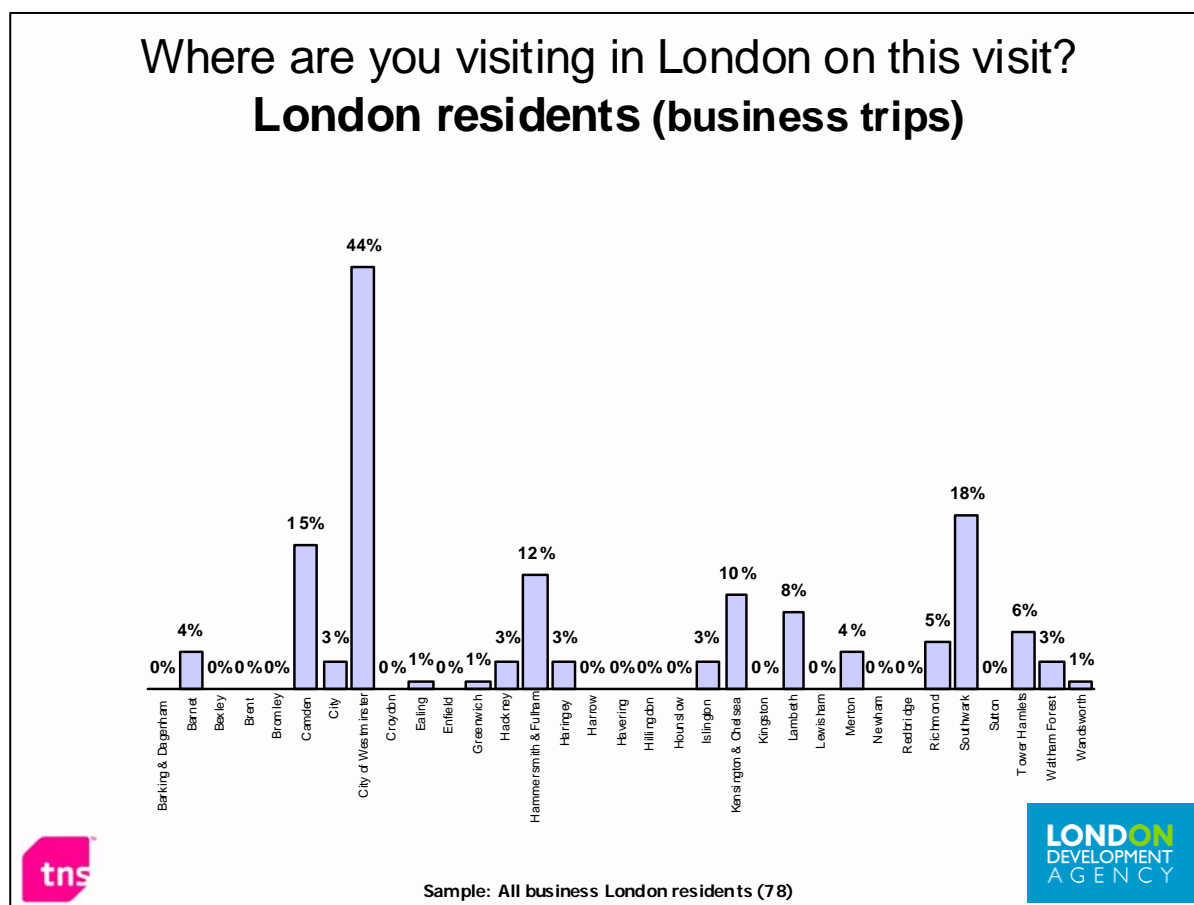
Please note: small sample size

Where are you visiting in London? (borough)



London residents (except those on business trips) were asked to name all the places they had visited and intended to visit in London during their day trip from home. The results are shown by borough. Westminster was the most commonly mentioned (40%). Other popular boroughs mentioned by visitors were Camden (16%), Southwark (13%), Kensington & Chelsea (10%) and Richmond (also 10%). While all other boroughs were mentioned by less than 10% of visitors, Hammersmith & Fulham (9%), Lambeth (9%) and Tower Hamlets (8%) were the most popular of these.

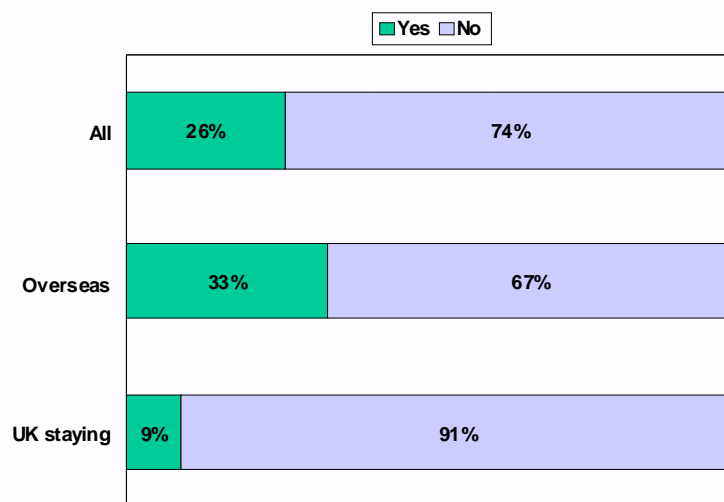
Where are you visiting in London? (borough)



London residents on business day trips were asked to name all the places they had visited and intended to visit in London during their visit. The results are shown by borough. At 44%, Westminster was by far the most frequently mentioned. Other popular boroughs mentioned by visitors were Southwark (18%), Camden (15%), Hammersmith & Fulham (12%) and Kensington & Chelsea (10%). All other boroughs were mentioned by less than 10% of visitors, with Lambeth the most popular of these (8%).

Visits to regions outside London

Have you visited or are you planning to visit anywhere outside London on this trip?



Sample: All non-business Overseas & UK staying visitors (2269), non-business Overseas (1677), non-business UK staying (592)

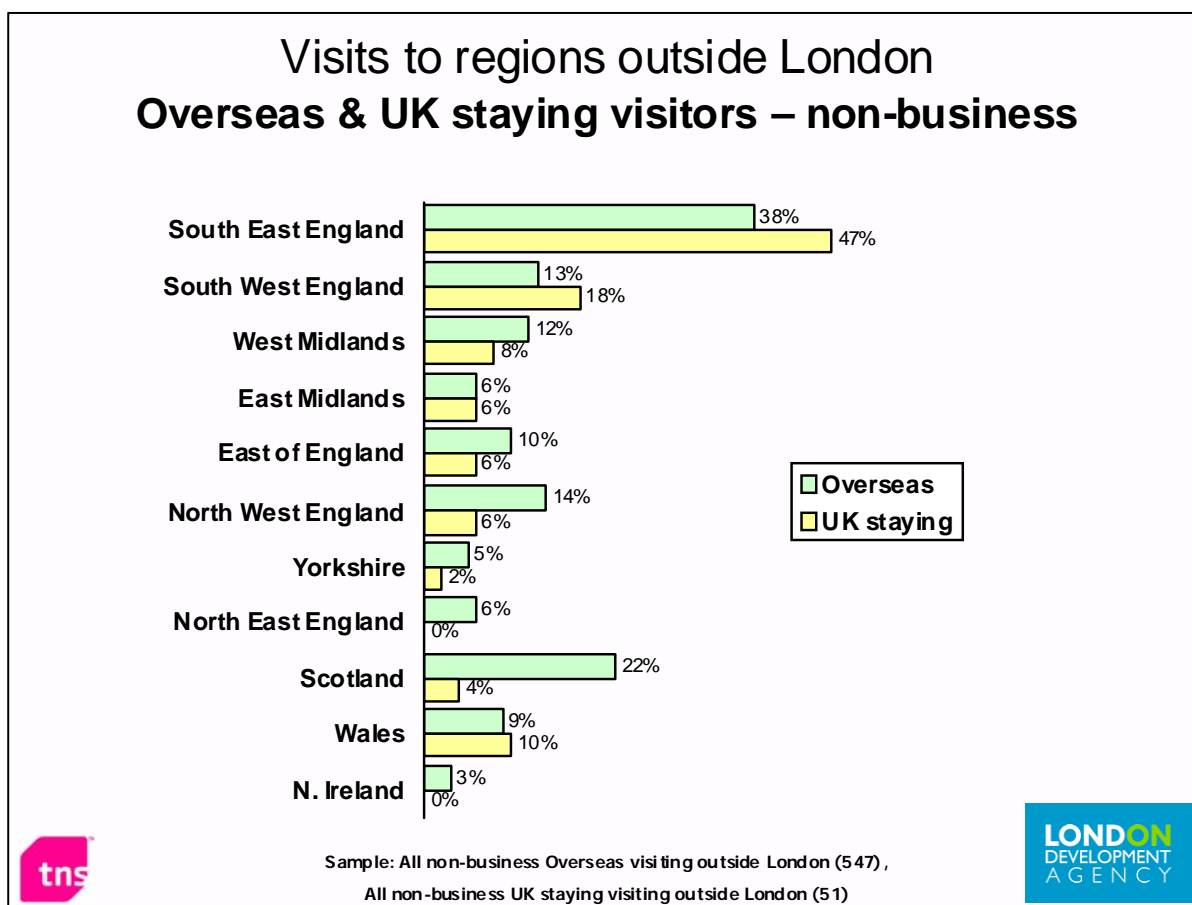


Just over a quarter (26%) of staying visitors* said they *had* visited or *planned* to visit somewhere outside of London during this trip away from home. Among overseas visitors, a third (33%) said that they had or would visit other regions, illustrating London's position as a gateway to the rest of the UK.

Among UK staying visitors to London, just 9% mentioned that they *had* visited or *planned* to visit a location outside of the capital on this trip, reflecting London's primary status as a short-break destination for the majority of UK staying visitors, with little time or intention to visit places other than London.

**Please note: Overseas/UK staying visitors on business and all Day visitors were not asked this question.*

Visits to regions outside London



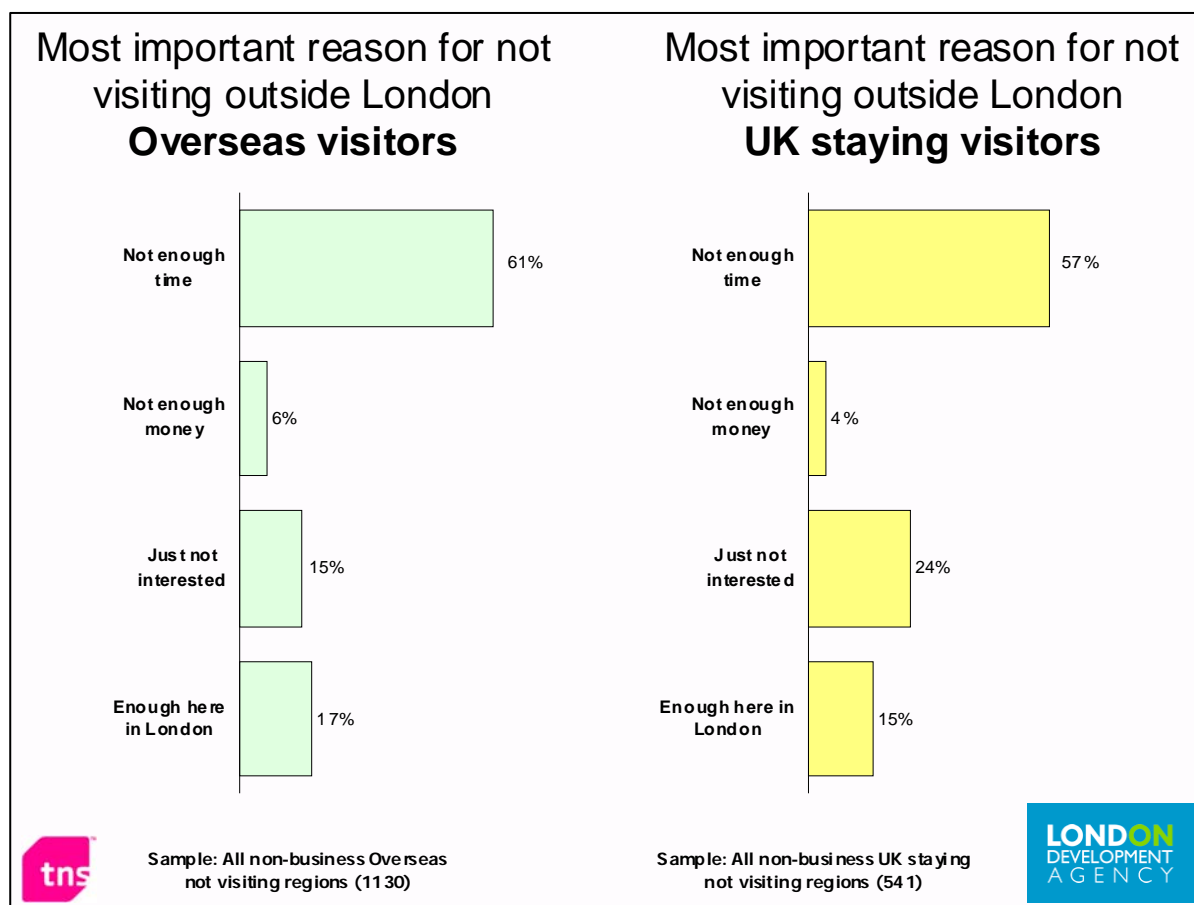
For overseas and UK staying visitors to London who had visited regions outside of London on their current trip, the South East was the most likely destination due to its proximity (38% and 47% respectively).

Among overseas visitors, the next most frequently mentioned region was Scotland (22%), ahead of North West England (14%), the South West (13%), West Midlands (12%), East of England (10%) and Wales (9%).

For UK staying visitors, South West England was the second most popular destination (18%), followed by Wales (10%), West Midlands (8%), East Midlands, East of England and the North West (all 6%).

Please note: Overseas/UK staying visitors on business and all Day visitors were not asked this question.

Visits to regions outside London



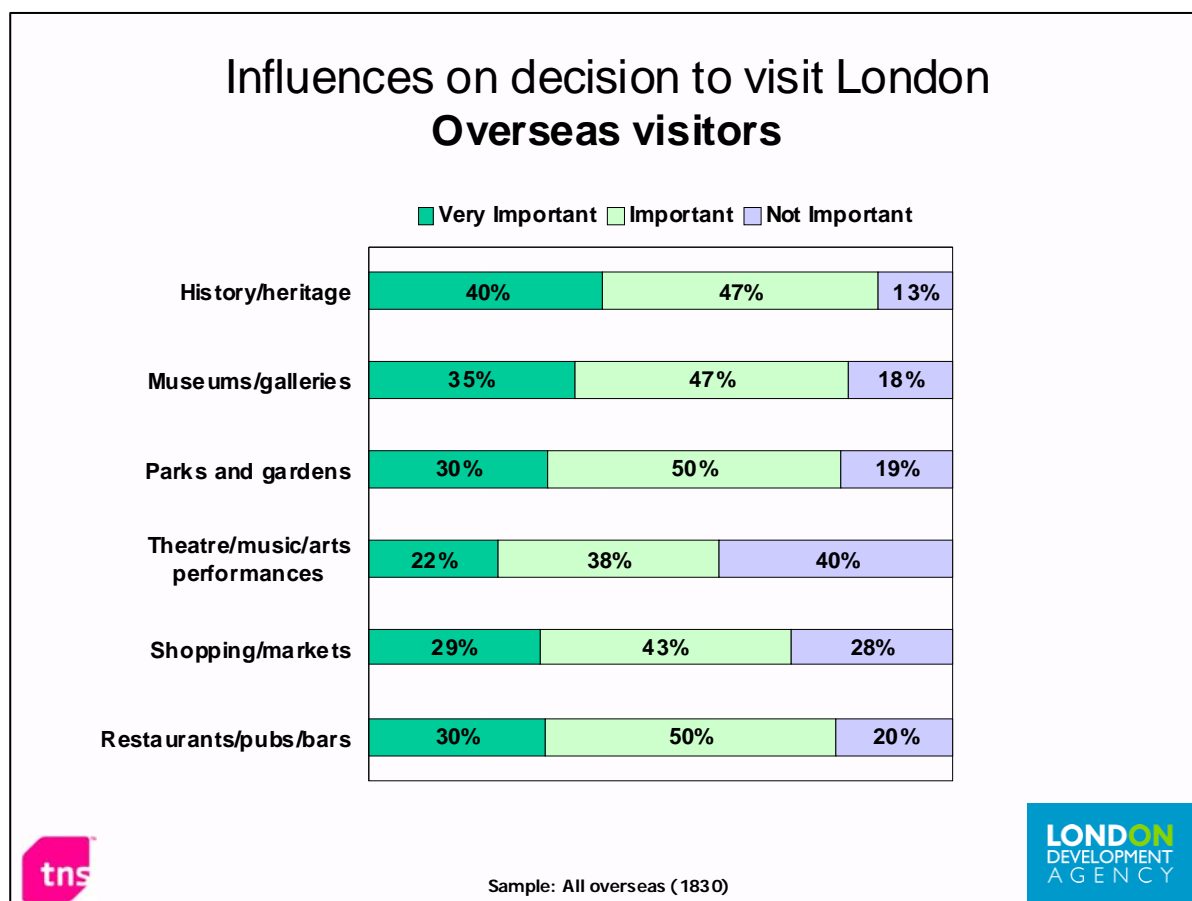
Lack of time was the main reason cited by the majority of visitors for not visiting any destinations outside London during their current visit - 61% of overseas visitors and 57% of UK staying visitors mentioned this factor.

Among overseas visitors, the next most common reason for not visiting destinations outside of London was that there was enough for them to do in the capital itself (17%), closely followed by having little interest in going elsewhere (15%). For UK staying visitors, lack of interest was the second most frequently mentioned reason (24%), ahead of there being enough to do in London (15%).

Please note: Overseas/UK staying visitors on business and all Day visitors were not asked this question.

Visitor experience and satisfaction

Influences on decision to visit

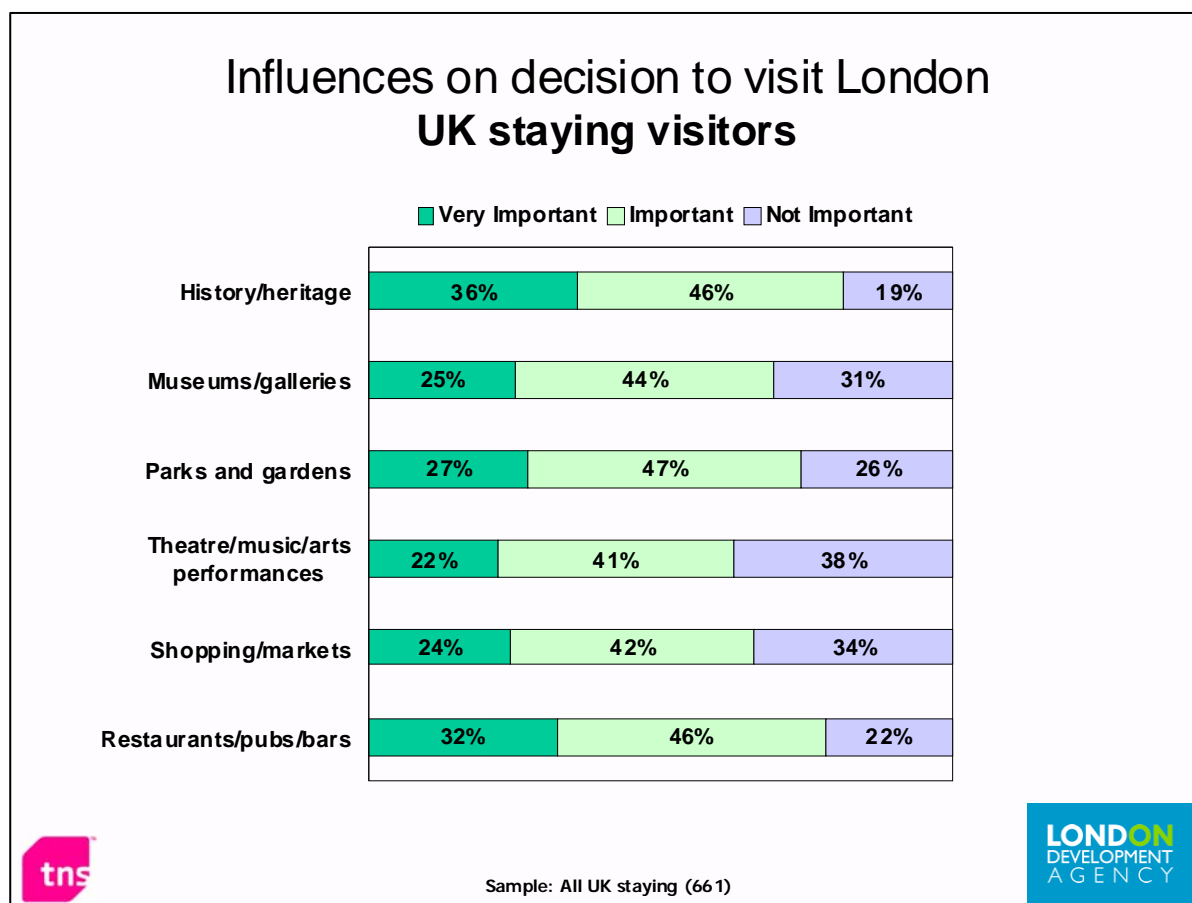


History/heritage was the strongest factor in the decision of overseas visitors to come to London, rated as very important by 40% of overseas visitors. Only 13% said that this was not important.

Museums/galleries was the next strongest driver, with 35% of this segment stating that this was very important. **Parks and gardens** and **restaurants/pubs/bars** were equally the next most influential factors, with 30% of overseas visitors rating these elements as very important, just ahead of **shopping/markets** at 29%.

Theatre/music/arts performances was the least influential factor - just over a fifth of overseas visitors (22%) said that this was very important, compared to 40% who stated that this was not an important factor in their decision to visit London.

Influences on decision to visit

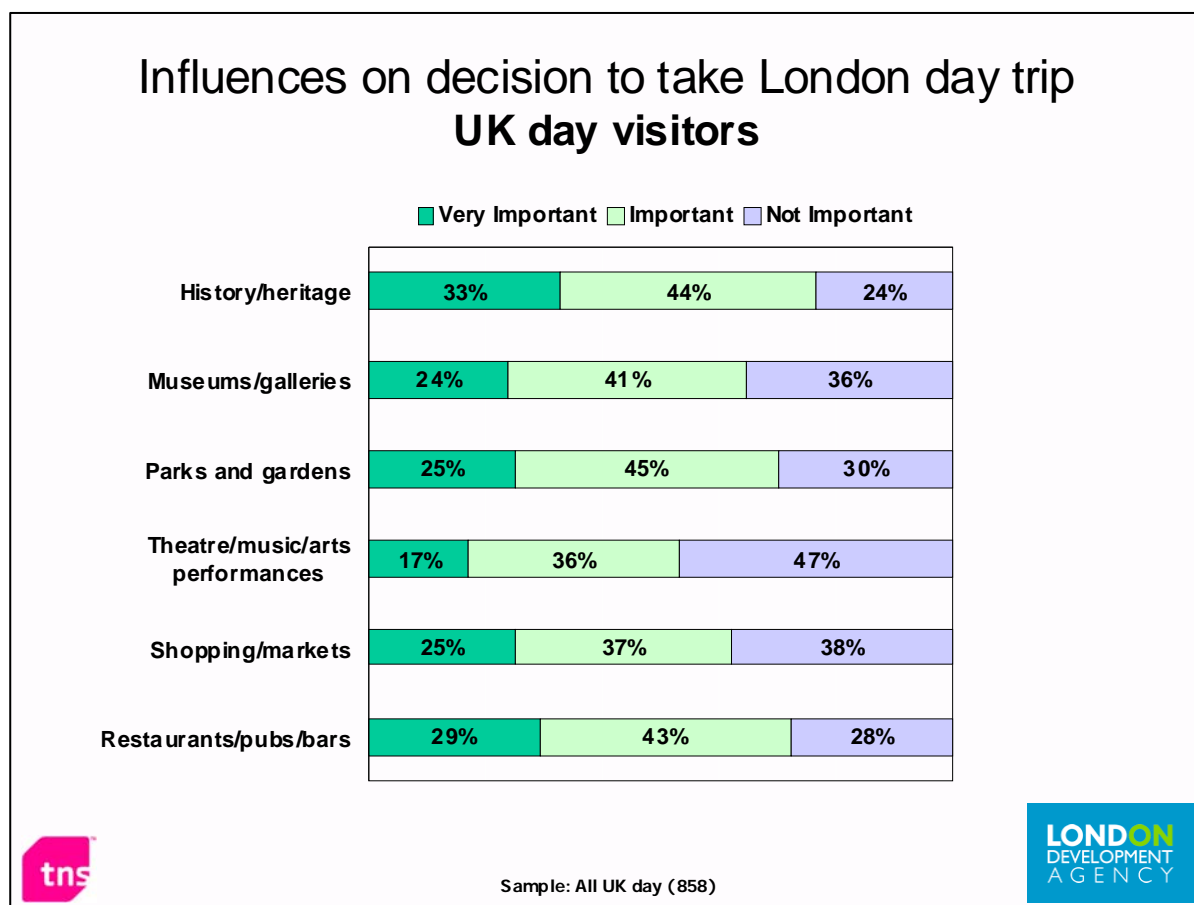


Among UK staying visitors, **history/heritage** held the most sway, with more than a third (36%) stating that this was very important. A further 46% rated this factor as important in their decision to come to London.

Restaurants/pubs/bars was the next most influential factor among this segment, with 32% saying this was very important. Just over a quarter of UK staying visitors rated **parks and gardens** as very important, ahead of **museums/galleries** (25%) and **shopping/markets** (24%).

Theatre/music/arts performances was the least influential factor, with just over a fifth of UK staying visitors (22%) stating that this was very important. In contrast, more than a third of this segment (38%) did not consider it important.

Influences on decision to visit



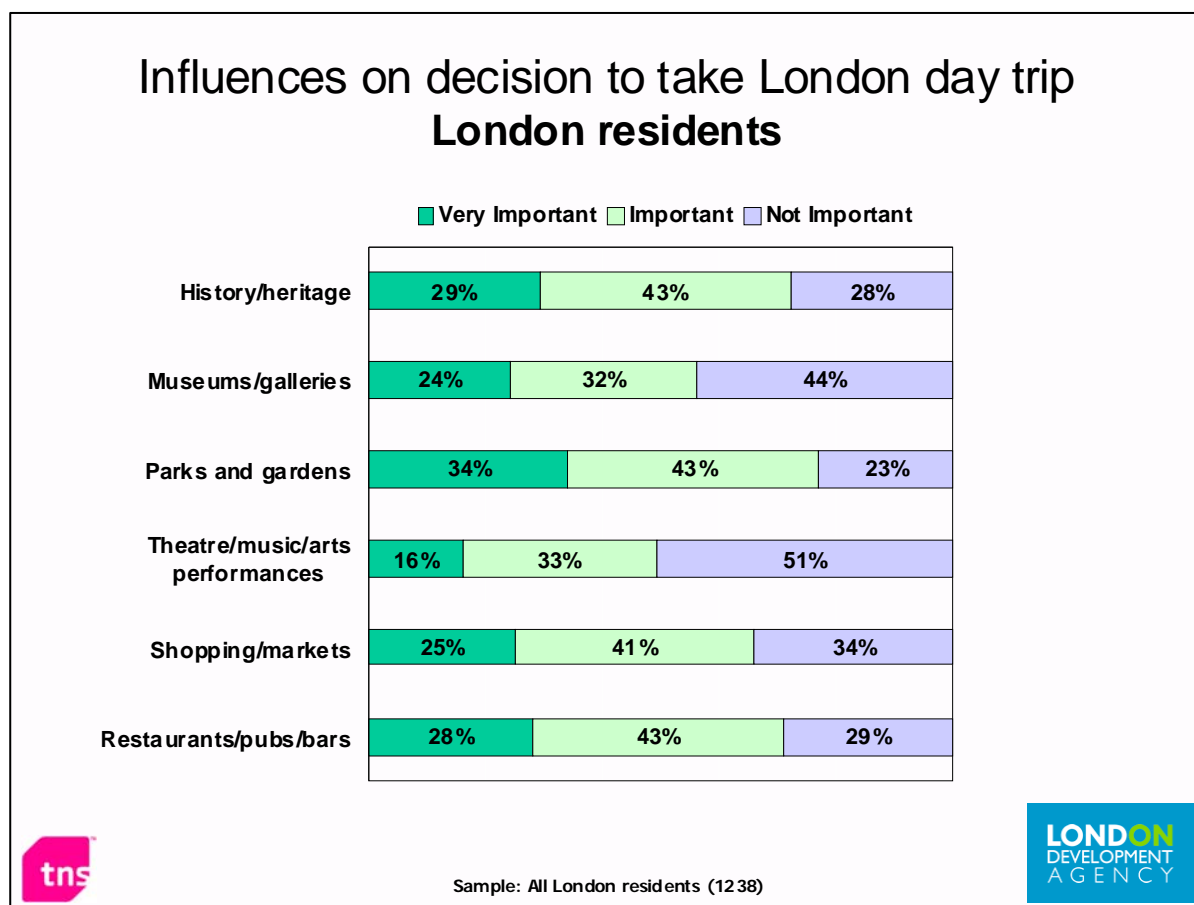
History/heritage was the strongest influence on the decision to visit London among UK day visitors, with a third (33%) rating this factor as very important.

Restaurants/pubs/bars was the next most influential factor (29% stated that this was very important), ahead of **parks and gardens** and **shopping/markets**, both of which were considered to be very important by 25% of this visitor segment.

Museums/galleries held a similar degree of influence, with 24% of UK staying visitors rating it as very important in the decision to come to London.

Theatre/music/arts performances was the least influential factor in terms of the decision to take a day trip to London - just 17% said that this was important. Almost half of the UK day visitors surveyed (47%) rated this as not important. It is worth noting that day visitors in the survey were mainly interviewed during the day and that those making trips to London to attend evening performances may have been less likely to be contacted within the survey (unless they spent the day in London prior to the event).

Influences on decision to visit

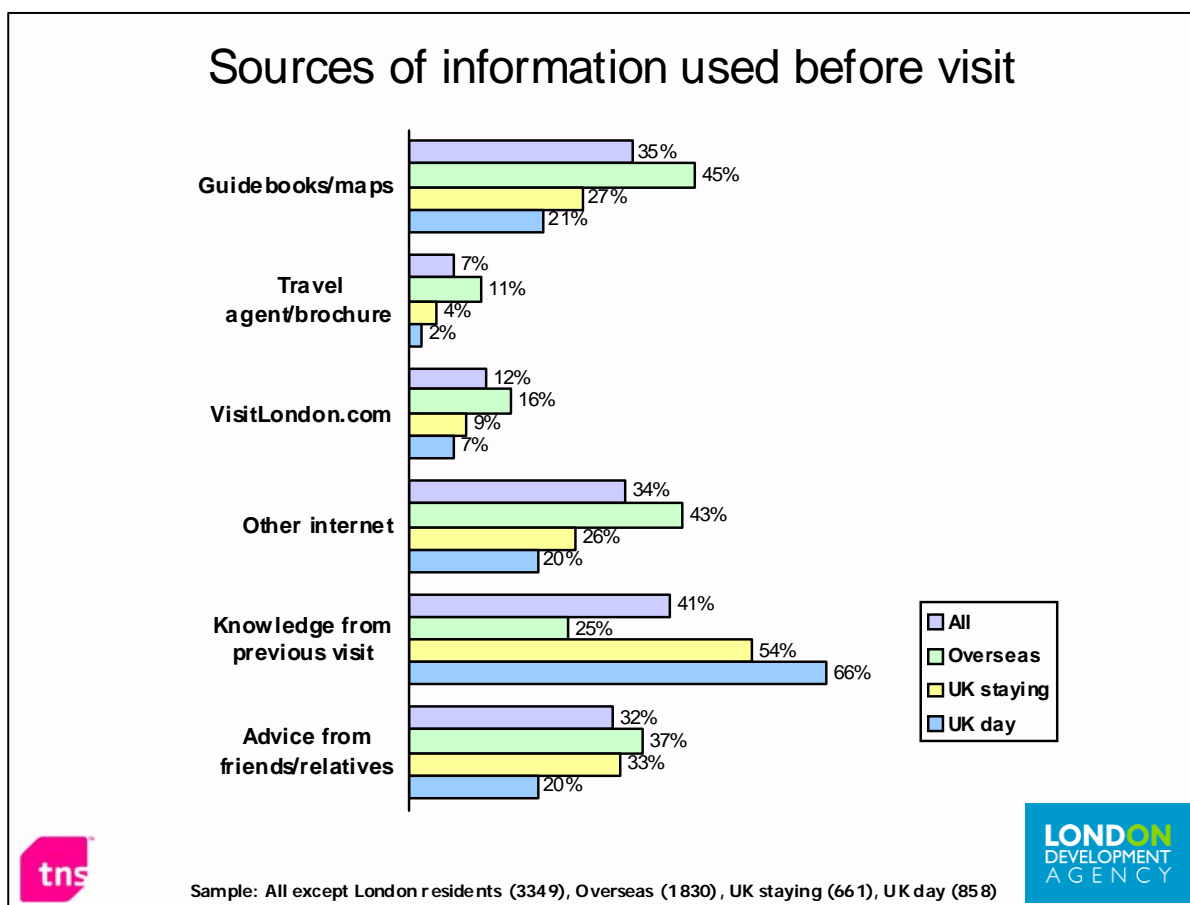


Parks and gardens was the strongest influence on the decision to have a day out in the capital, with just over a third of London residents (34%) deeming this to be very important.

The next most influential factor was **history/heritage** (29% said this was very important), closely followed by **restaurants/pubs/bars** which was very important to 28% of those surveyed. Around a quarter of London residents (25%) said that **shopping/markets** had a high degree of influence, just ahead of **museums/galleries** (24%).

Less than a fifth of London residents (16%) highlighted **theatre/music/arts performances** as very important. In contrast, more than half (51%) said that this was not important. Again, it is worth noting that day visitors in the survey were mainly interviewed during the day and that those making trips to attend evening performances may have been less likely to be contacted within the survey (unless they spent the day in London prior to the event).

Information sources – before visit (most popular)



Overall, **knowledge from a previous trip** was the most frequently used information source in advance of a visit to London, with 41% of all those interviewed mentioning this. The next most popular sources of pre-trip information were **guidebooks/maps** (35%), the **internet** (other than VisitLondon.com) at 34% and **advice from friends/relatives** (32%). Around 12% of visitors had used the **VisitLondon.com** site, while 7% had used a **travel agent**.

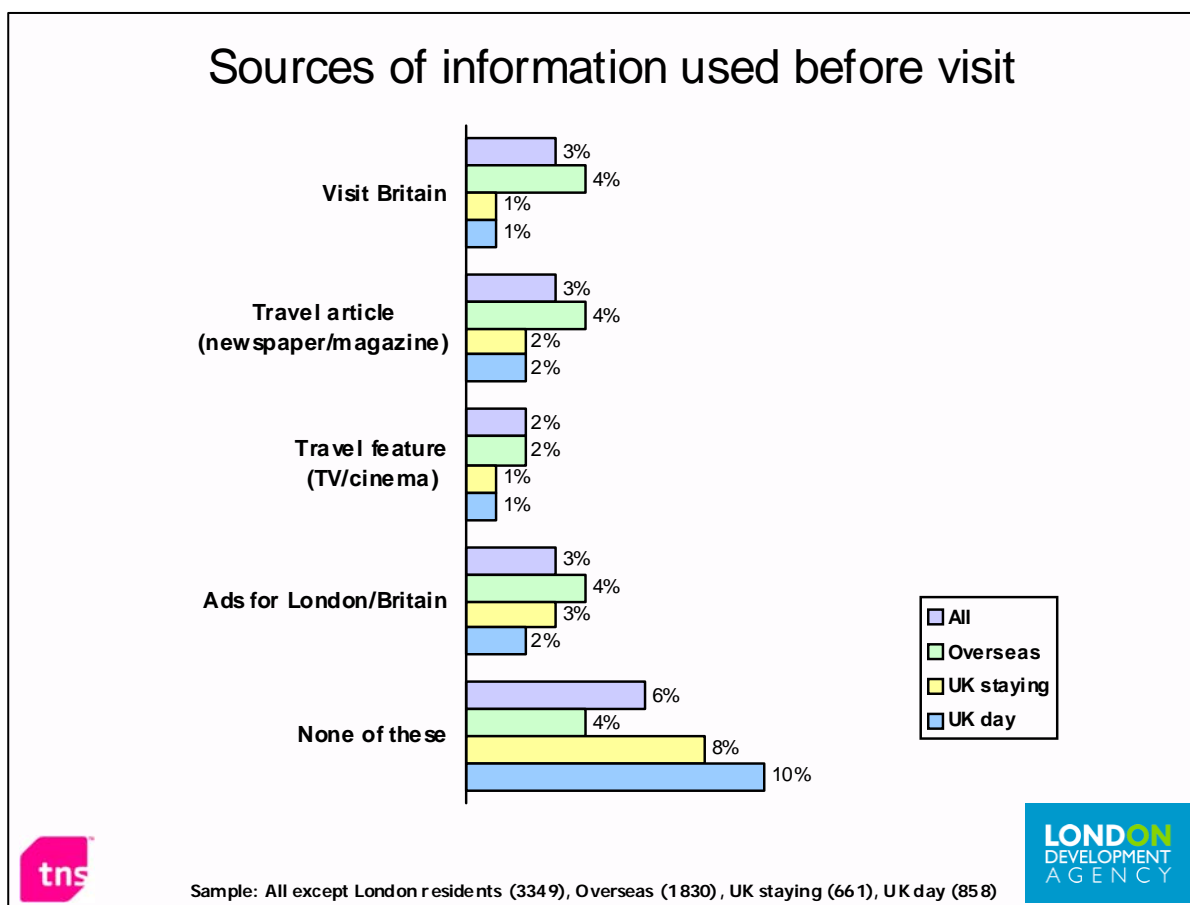
Among overseas visitors, 45% said that they had used **guidebooks/maps** before the trip to London, ahead of the **internet** (other than VisitLondon.com) at 43%. At 37%, **advice from friends/relatives** was the next most popular source, followed by **prior knowledge** (25%).

UK staying visitors mentioned **knowledge from a previous trip** (54%) as the most frequently used information source before a visit to London, ahead of **advice from friends/relatives** (33%). Just over a quarter of this segment had used **guidebooks/maps** (27%) and 26% had used the **internet** (other than VisitLondon.com).

UK day visitors were most likely to use **prior knowledge** (66%). The next most popular information sources were similar; **guidebooks/maps** (21%), the **internet** (other than VisitLondon.com) at 20% and **advice from friends and relatives** (also 20%).

Please note: London residents were not asked this question.

Information sources – before visit (other)

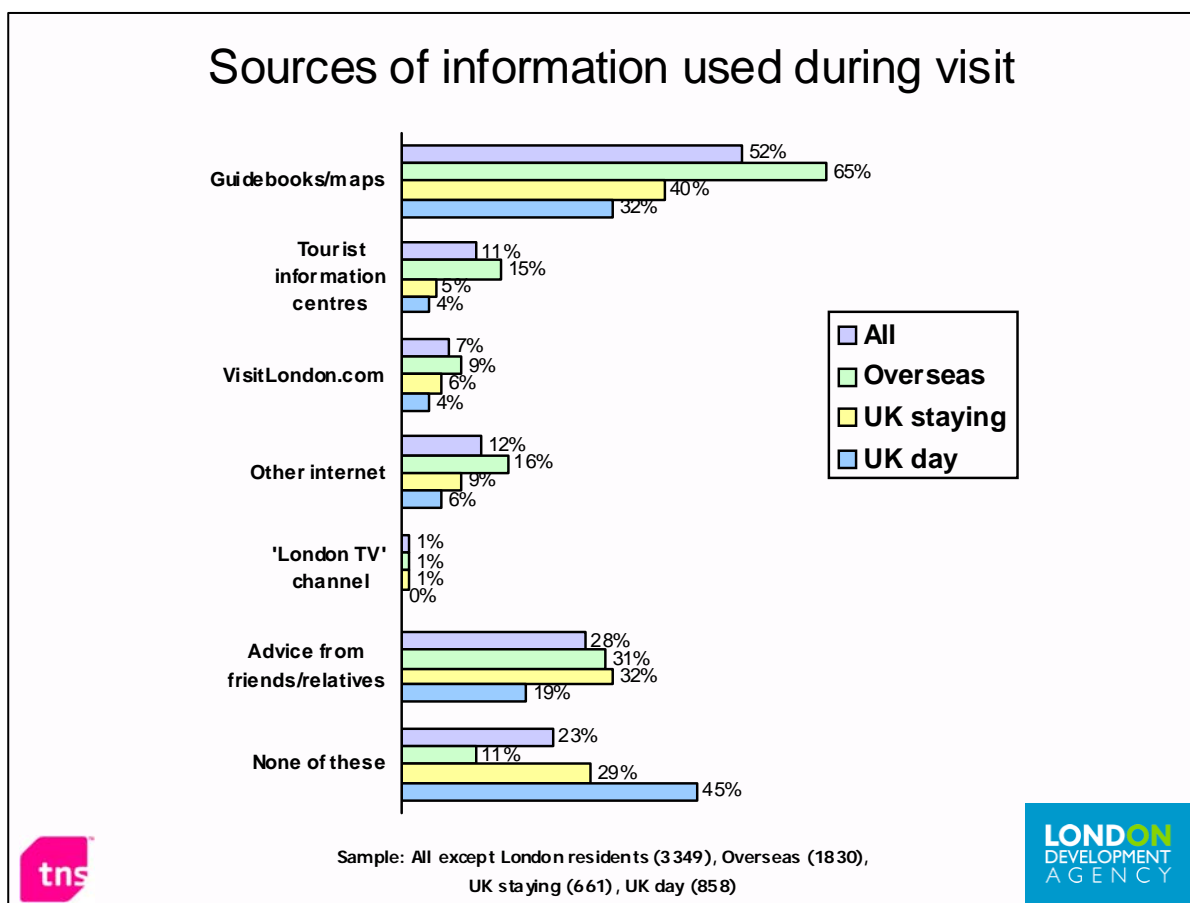


Of the less frequently used pre-trip information sources, 3% of all visitors had used information direct from **Visit Britain offices/bureaus**. A similar proportion had consulted **travel articles** or **advertisements for London/Britain** (both of which were also used by 3% of visitors). The proportion of visitors who had used information from **travel features** was 2% overall.

The overall proportion of visitors who had not used any of the noted information sources before visiting the capital was 6%; of those 10% were UK day visitors, 8% were UK staying visitors and 4% were overseas visitors.

Please note: London residents were not asked this question.

Information sources – during visit



Overall, **guidebooks/maps** was by far the most frequently used information source during visits to London, with more than half (52%) mentioning this. The next most frequently mentioned sources of information were **advice from friends and relatives** (28%), the **internet** (other than VisitLondon.com) at 12% and **tourist information centres** (11%).

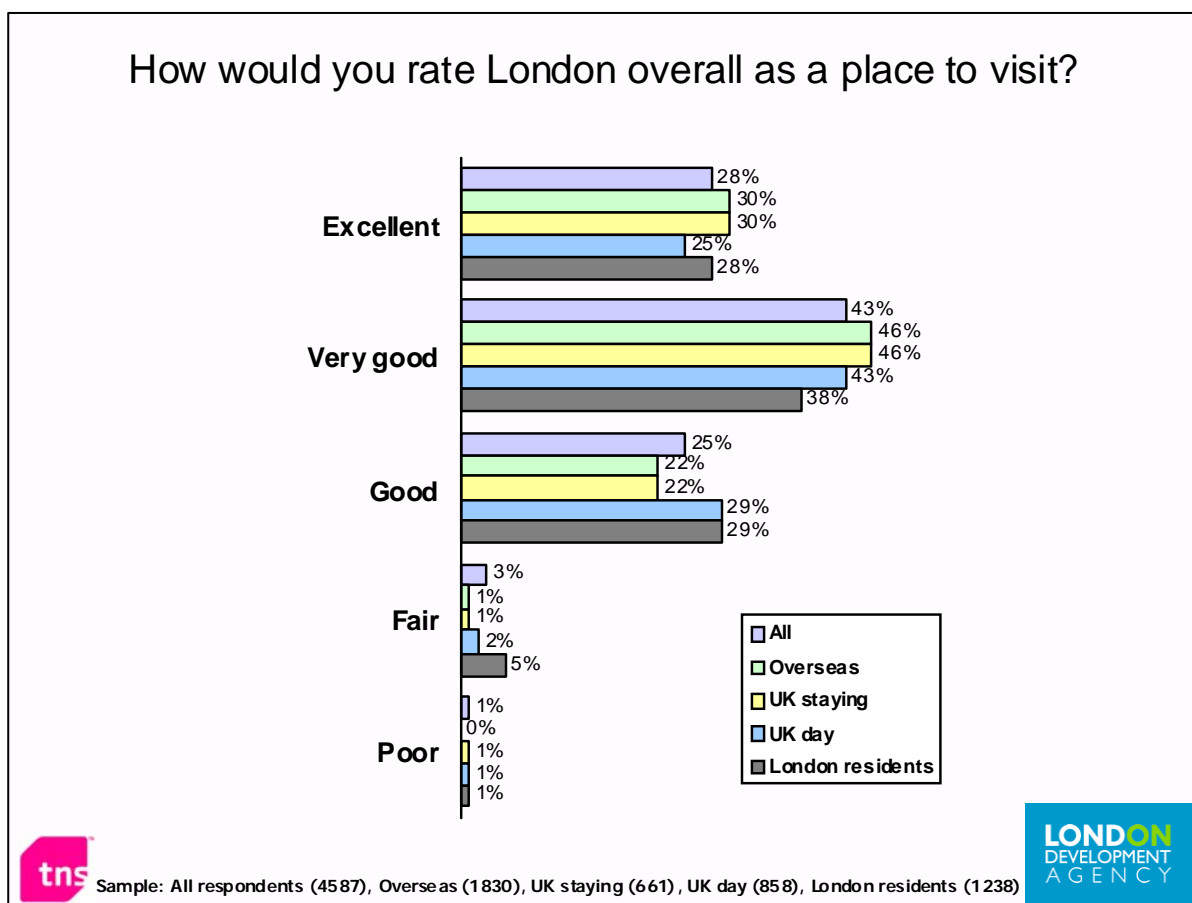
Guidebooks/maps was the dominant source among overseas visitors during their visit (65%). Other secondary information sources were **advice from friends and relatives** (31%), the **internet** (16%) and **tourist information centres** (15%).

UK staying visitors most frequently used **guidebooks/maps** (40%) and **advice from friends and relatives** (32%). Other sources were rarely used and more than quarter (29%) did not use any of the listed sources.

Among UK day visitors, just under a third (32%) had referred to **guidebooks/maps** during their visit, while 19% had used **advice from friends and relatives**. However, around 45% of this segment did not use any of the information sources.

Please note: London residents were not asked this question.

Visitor satisfaction



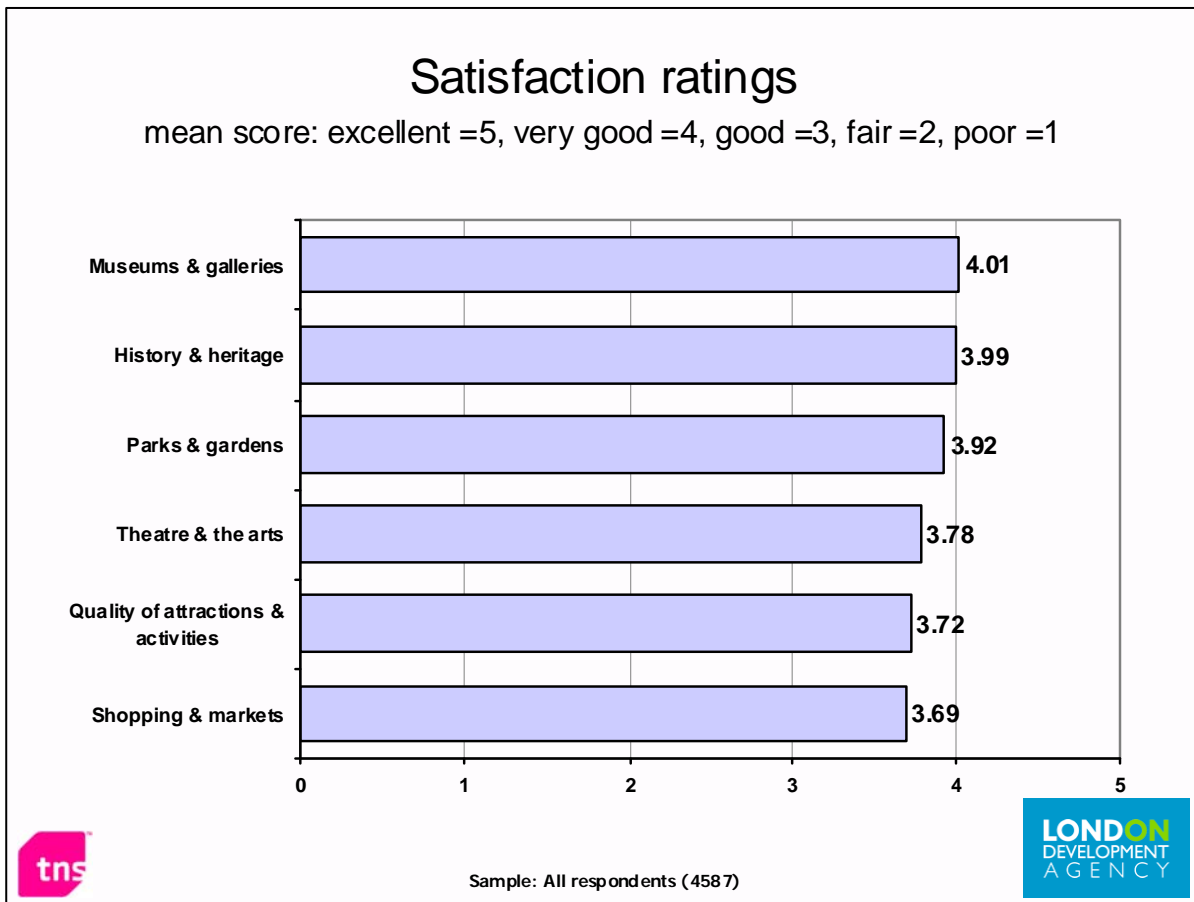
Overall visitor satisfaction with London was strong, with almost three-quarters (71%) rating London as either **excellent** (28%) or **very good** (43%) as a place to visit, with another quarter (25%) saying that it was **good**.

Overseas visitors and UK staying visitors were most likely to rate London as an **excellent** place to visit (both 30%), ahead of London residents (28%) and UK day visitors (25%).

Similarly, overseas visitors and UK staying visitors were more likely to state that the capital was **very good** as a place to visit (both 46%) compared to UK day visitors (43%) and London residents (38%).

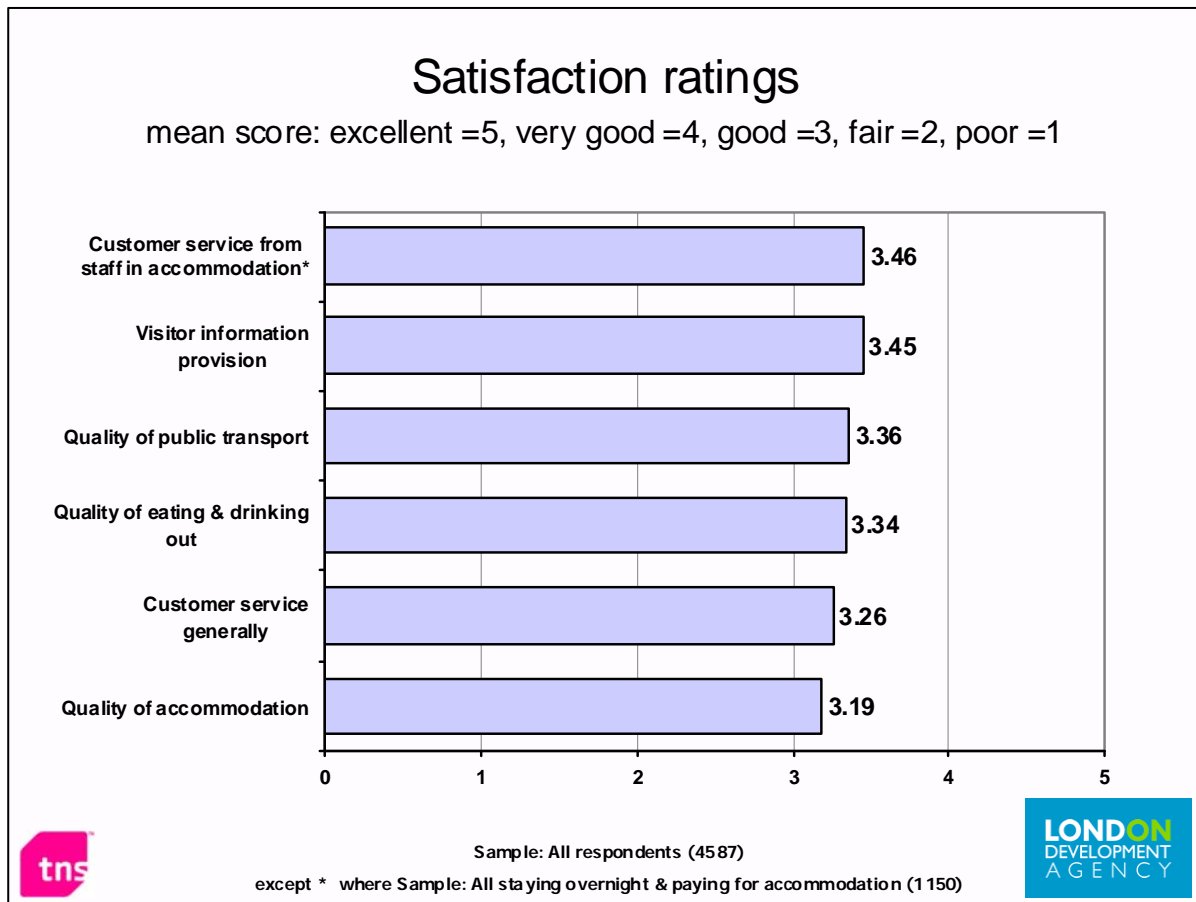
Around 29% of both UK day visitors and London residents rated London as **good**, followed by overseas visitors and UK staying visitors (both 22%).

Overall satisfaction ratings – activities



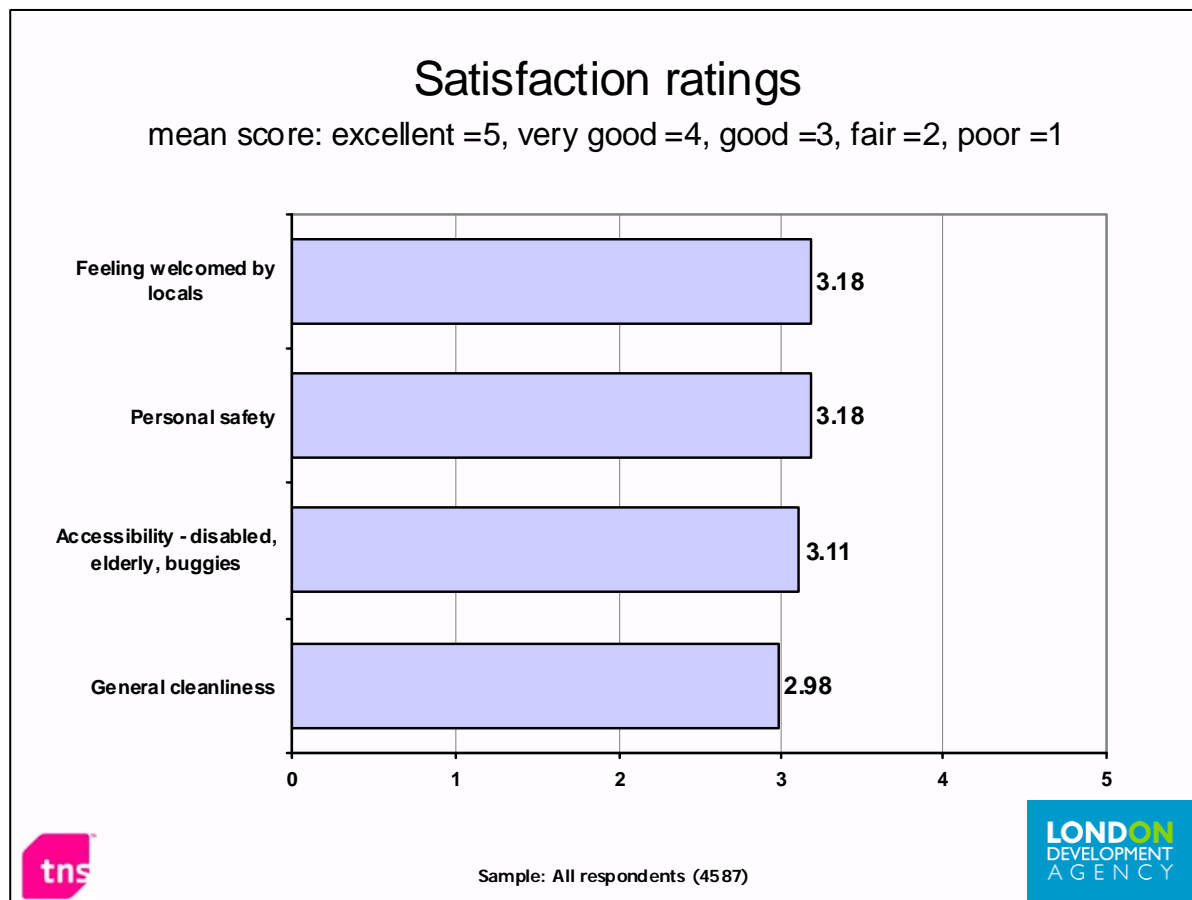
When considering overall satisfaction in relation to **activities** in London, on a scale of 1 to 5 (with 5 being the maximum score), **museums & galleries** attracted the highest level of satisfaction overall, with a mean score of 4.01. **History & heritage** received the next highest rating at 3.99, ahead of **parks & gardens** (3.92), **theatre & the arts** (3.78), **quality of attractions & activities** (3.72) and **shopping & markets** (3.69).

Overall satisfaction ratings – quality of service



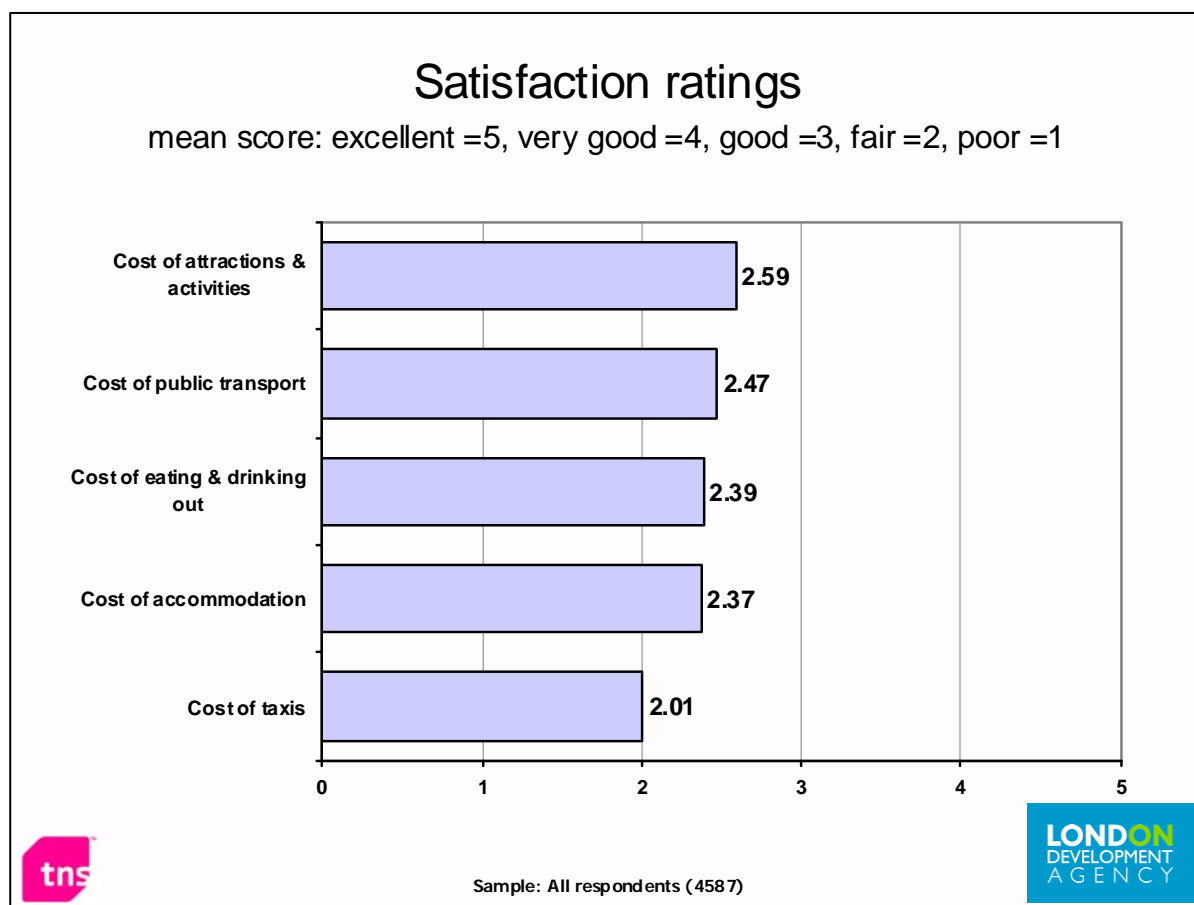
When considering overall satisfaction with aspects of **quality of service**, **customer service from staff in accommodation** attracted a mean score of 3.46 among visitors who were staying at least one night in the capital and paying for their accommodation. Asked of everyone, **visitor information provision** was rated at 3.45, followed by **quality of public transport** (3.36), **quality of eating & drinking out** (3.34), **customer service generally** (3.26) and **quality of accommodation** (3.19).

Overall satisfaction ratings – security, environment and accessibility



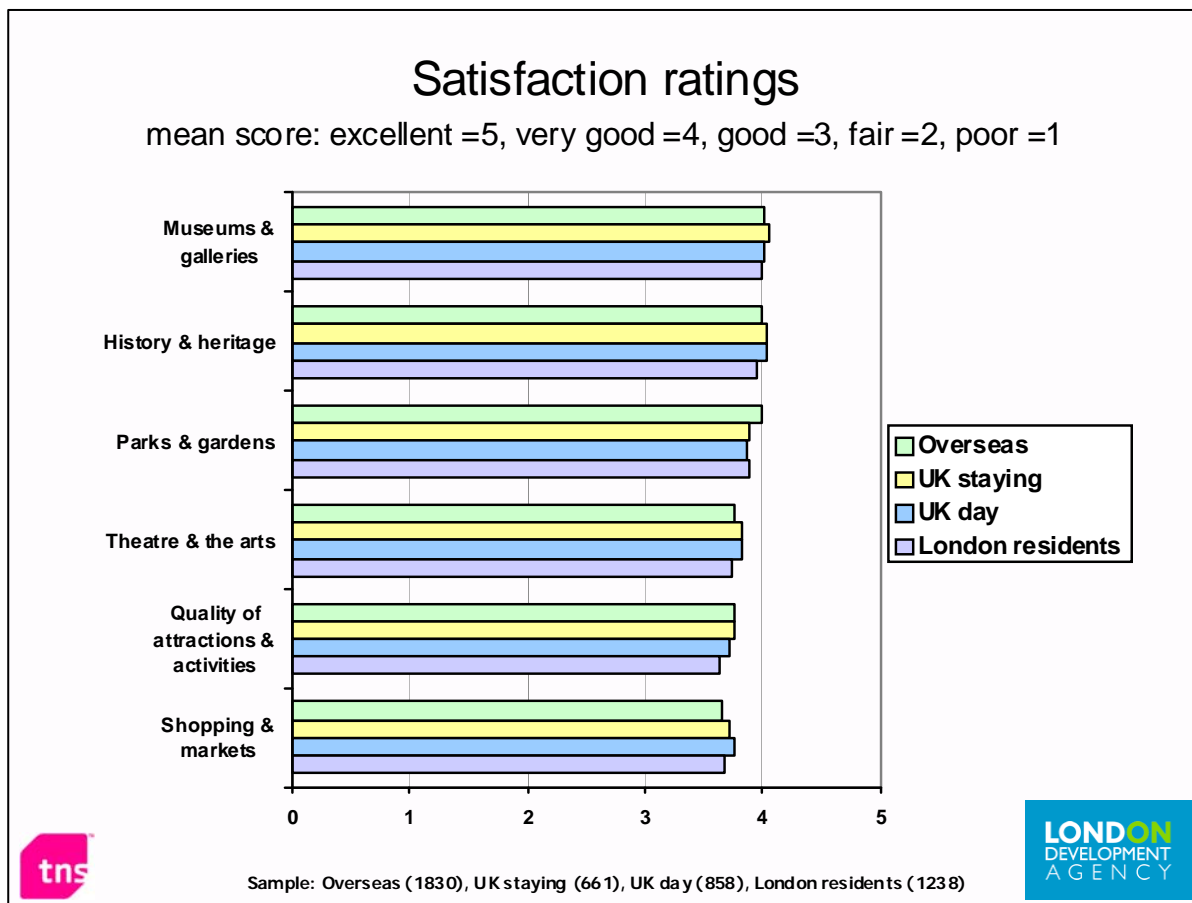
When considering overall satisfaction with aspects of **security, environment** and **accessibility, feeling welcomed by locals** received a mean score of 3.18, as did **personal safety** (also 3.18). **Accessibility for the disabled, elderly and those with buggies** achieved a mean score of 3.11, ahead of **general cleanliness** at 2.98.

Overall satisfaction ratings – costs



Factors related to pricing recorded the lowest satisfaction ratings overall. The **cost of attractions & activities** attracted a mean score of 2.59, followed by the **cost of public transport** (2.47), the **cost of eating & drinking out** (2.39), the **cost of accommodation** (2.37) and the **cost of taxis** (2.01).

Satisfaction ratings by visitor type – activities



When considering satisfaction in relation to **activities** in London, by visitor type, over the course of 2008, average visitor ratings were high (between good and very good). Of these, **museums & galleries** attracted the highest rating among each visitor type ahead of **history & heritage**, with the exception of overseas visitors who rated **history & heritage** and **parks & gardens** equally in second place, and UK day visitors who rated **history & heritage** just ahead of **museums & galleries**.

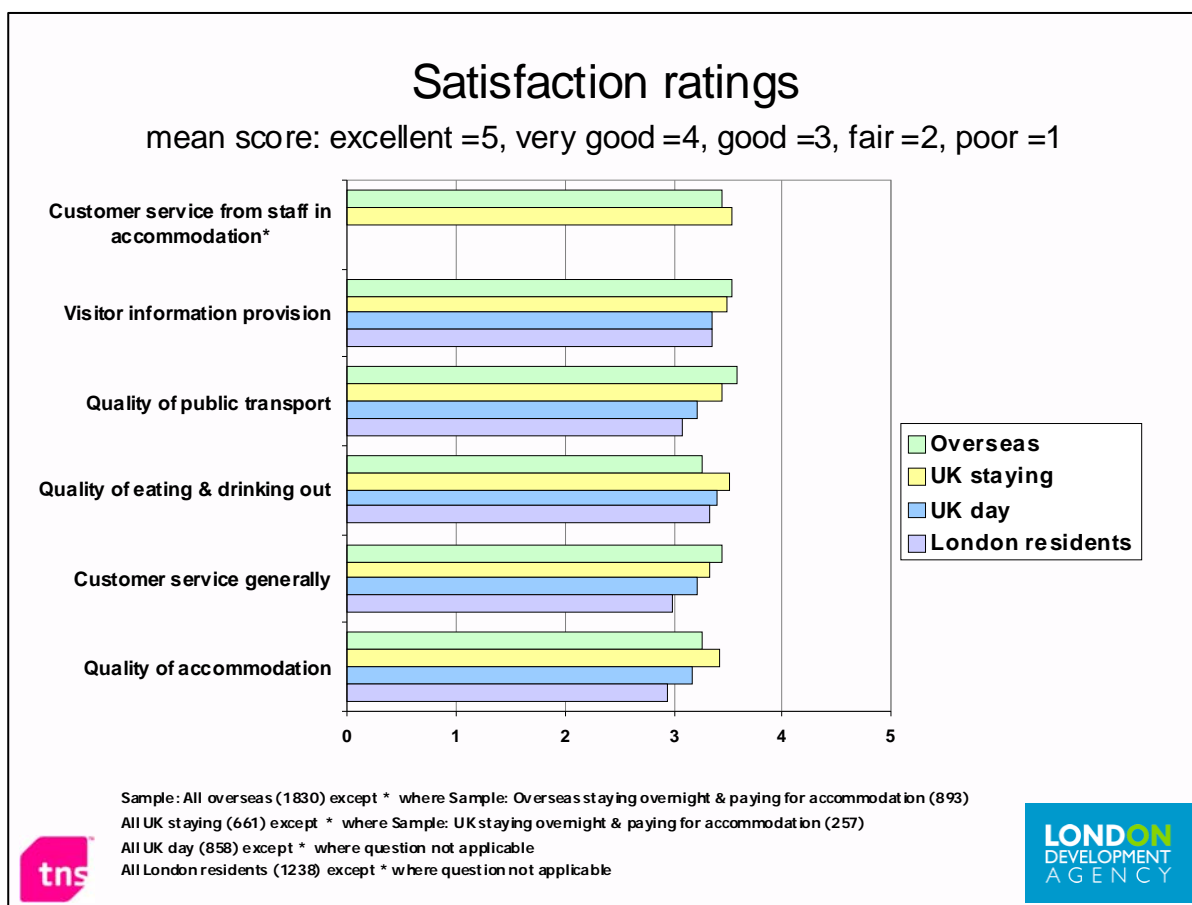
More specifically, **museums & galleries** recorded the highest mean score among overseas visitors (4.01), ahead of **history & heritage** (3.99) and **parks & gardens** (also 3.99).

UK staying visitors rated **museums & galleries** at 4.05, followed by **history & heritage** (4.03) and **parks & gardens** (3.88).

Among UK day visitors, **history & heritage** was rated slightly higher than **museums & galleries** (4.04 and 4.02 respectively), while **parks & gardens** attracted a score of 3.86.

London residents followed the overall pattern in that **museums & galleries** received the highest rating (4.00), followed by **history & heritage** (3.94) and **parks & gardens** (3.89).

Satisfaction ratings by visitor type – quality of service



When considering levels of satisfaction with aspects of **quality of service**, average ratings were also relatively high, although a little lower than the ratings for **activities**.

Visitor information provision and **quality of public transport** were rated more positively by overseas visitors (3.54 and 3.58 respectively) and UK staying visitors (3.48, 3.44) compared to UK day visitors (3.35, 3.21) and London residents (3.36, 3.08).

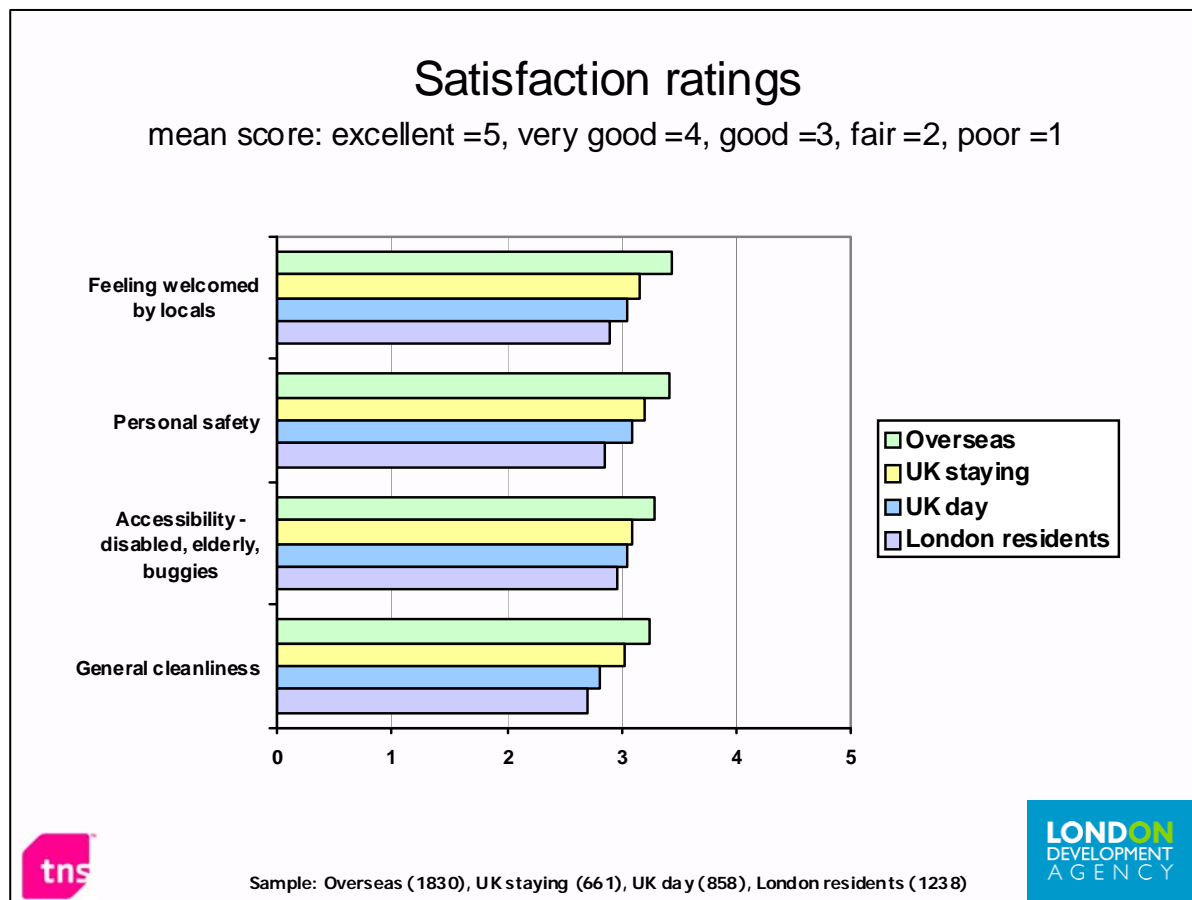
Similarly, **customer service generally** and **quality of accommodation** achieved stronger mean scores among overseas visitors (3.44 and 3.26 respectively) and UK staying visitors (3.33, 3.43), compared to UK day visitors (3.22, 3.16) and London residents (2.99, 2.95).

In contrast, UK staying visitors were the most satisfied with the **quality of eating & drinking out** (3.51), ahead of UK day visitors (3.40), London residents (3.32) and overseas visitors (3.27).

In terms of **customer service from staff in accommodation**, UK staying visitors gave this a slightly higher mean score (3.54) than overseas visitors (3.44).

Please note: day visitors were not asked to rate customer service from staff in accommodation.

Satisfaction ratings by visitor type – security, environment and accessibility



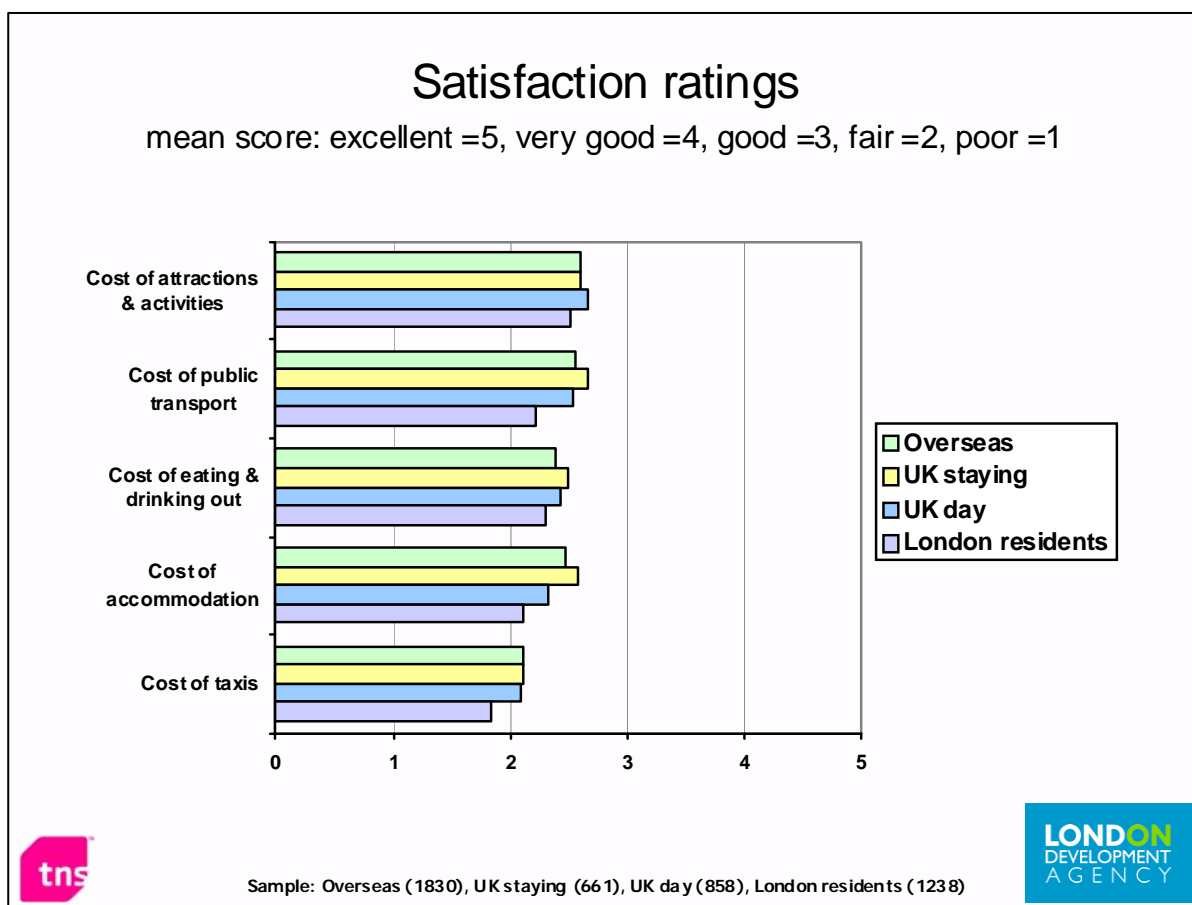
When considering levels of satisfaction with aspects of **security, environment and accessibility**, average ratings were generally lower overall when compared with those for **activities** and **quality of service**. Overseas and UK staying visitors were more positive than UK day visitors and London residents on all aspects.

Feeling welcomed by locals and **personal safety** were rated more positively by overseas visitors (3.43 and 3.42 respectively) and UK staying visitors (3.16, 3.19) compared to UK day visitors (3.04, 3.10) and London residents (2.90, 2.86).

Accessibility for the disabled, elderly and those with buggies was rated at 3.29 by overseas visitors, while the comparative figures for UK staying visitors, UK day visitors and London residents were 3.09, 3.04 and 2.97 respectively.

In terms of **general cleanliness**, overseas visitors awarded this a mean score of 3.24, while UK staying visitors (3.03), UK day visitors (2.80) and London residents (2.70) rated it less strongly.

Satisfaction ratings by visitor type – costs



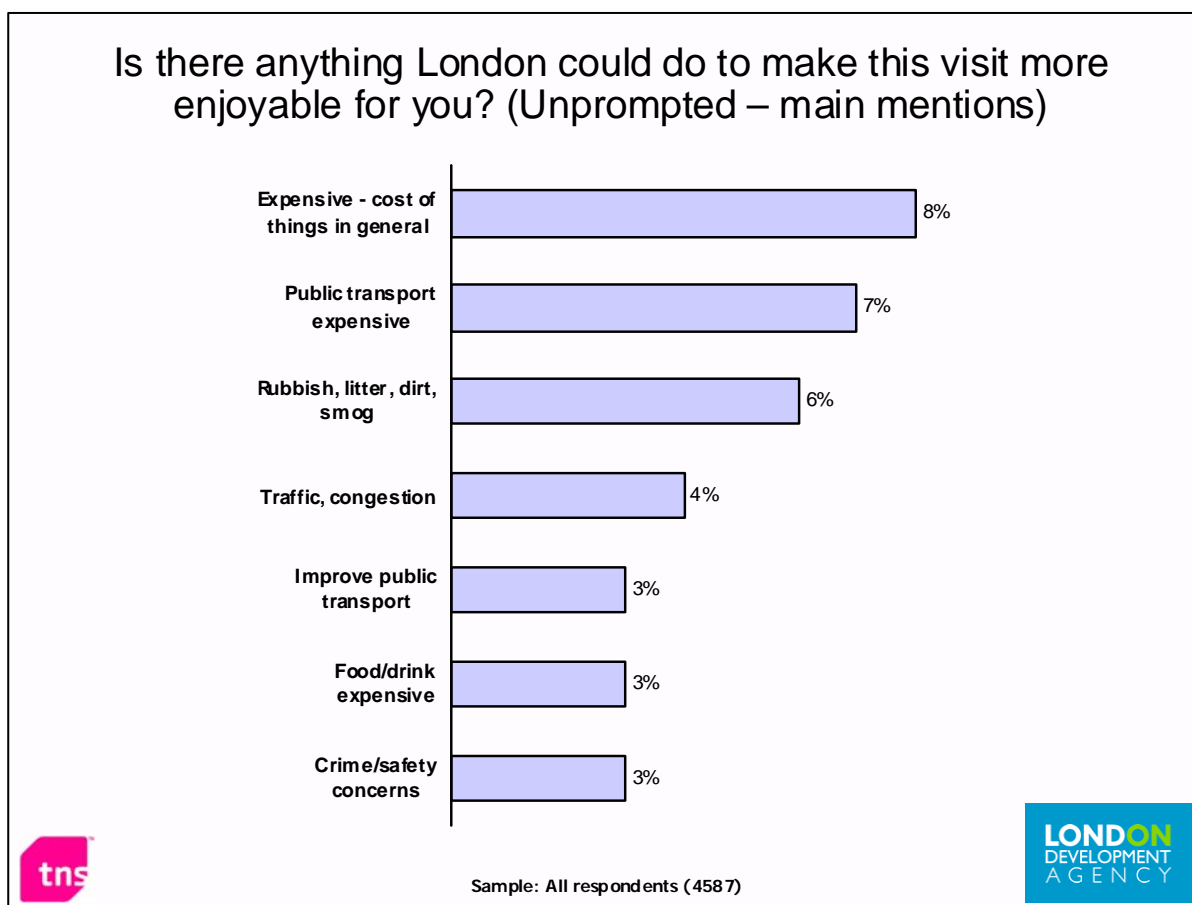
Satisfaction ratings for aspects relating to **costs** were lower than for the other aspects of the London experience (**activities, quality of service** and **security, environment & accessibility**), with the responses mostly falling in the *fair* to *good* range.

Cost of public transport, cost of accommodation and **cost of taxis** attracted higher ratings among overseas visitors (2.55, 2.48 and 2.11 respectively) and UK staying visitors (2.66, 2.59, 2.11) than among UK day visitors (2.53, 2.33, 2.08) and London residents (2.21, 2.12, 1.83).

UK day visitors were the most satisfied with the **cost of attractions & activities** (2.66), ahead of overseas visitors and UK staying visitors (both at 2.61) and London residents (the least satisfied with a mean score of 2.51).

The level of satisfaction with the **cost of eating & drinking out** in London was highest among UK staying visitors (2.49), followed by UK day visitors (2.44), overseas visitors (2.39) and London residents (2.30).

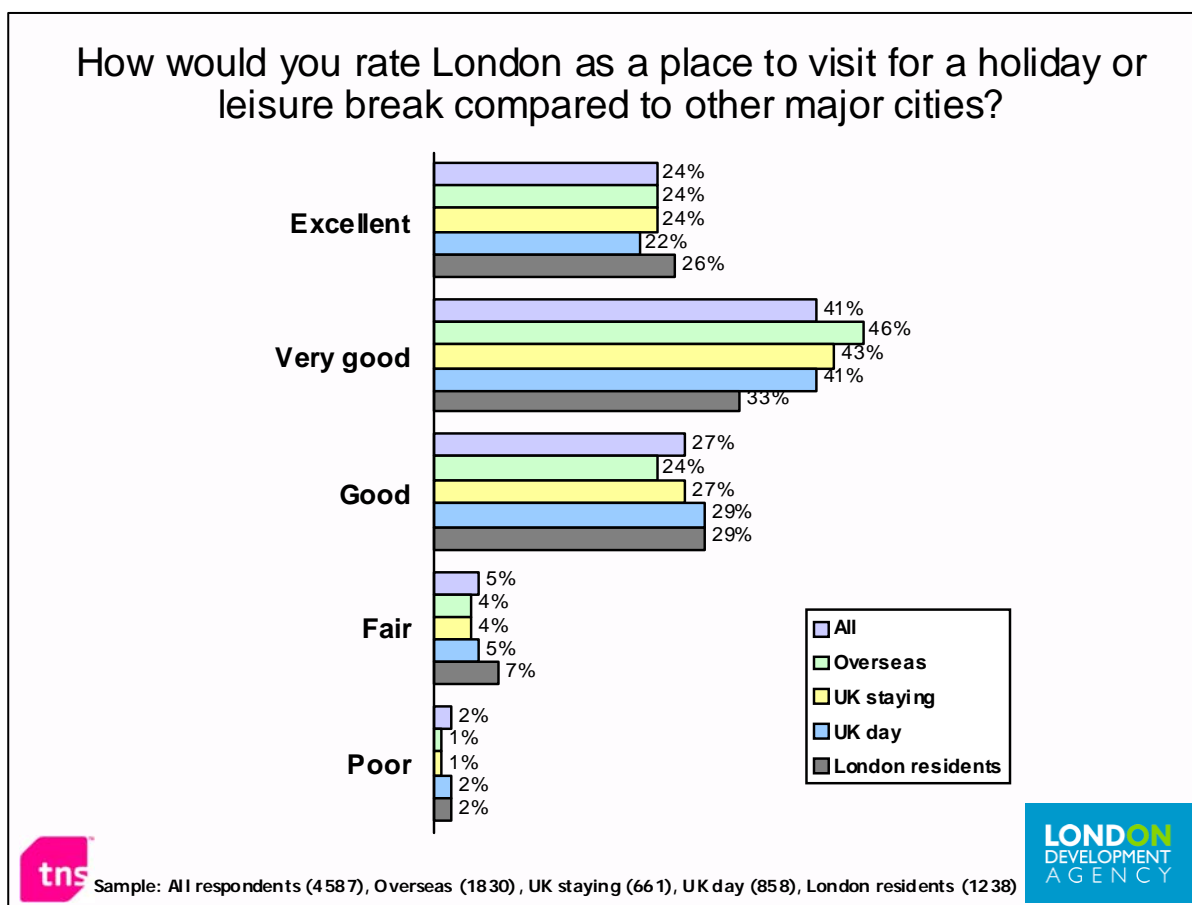
Making London more enjoyable



Overall, when visitors were asked if there was anything that London could do to make their visit more enjoyable, the most frequent response was the **cost of things in general** (8%), followed by the view that **public transport was expensive** (7%). Further to this, visitors to the capital mentioned **rubbish/litter/dirt/smog** (6%) and **traffic/congestion** (4%).

Secondary suggestions for improvements were the need to **improve public transport** (3%), **make food & drink less expensive** (3%) and **crime/safety concerns** (also 3%).

Comparative ratings to other cities

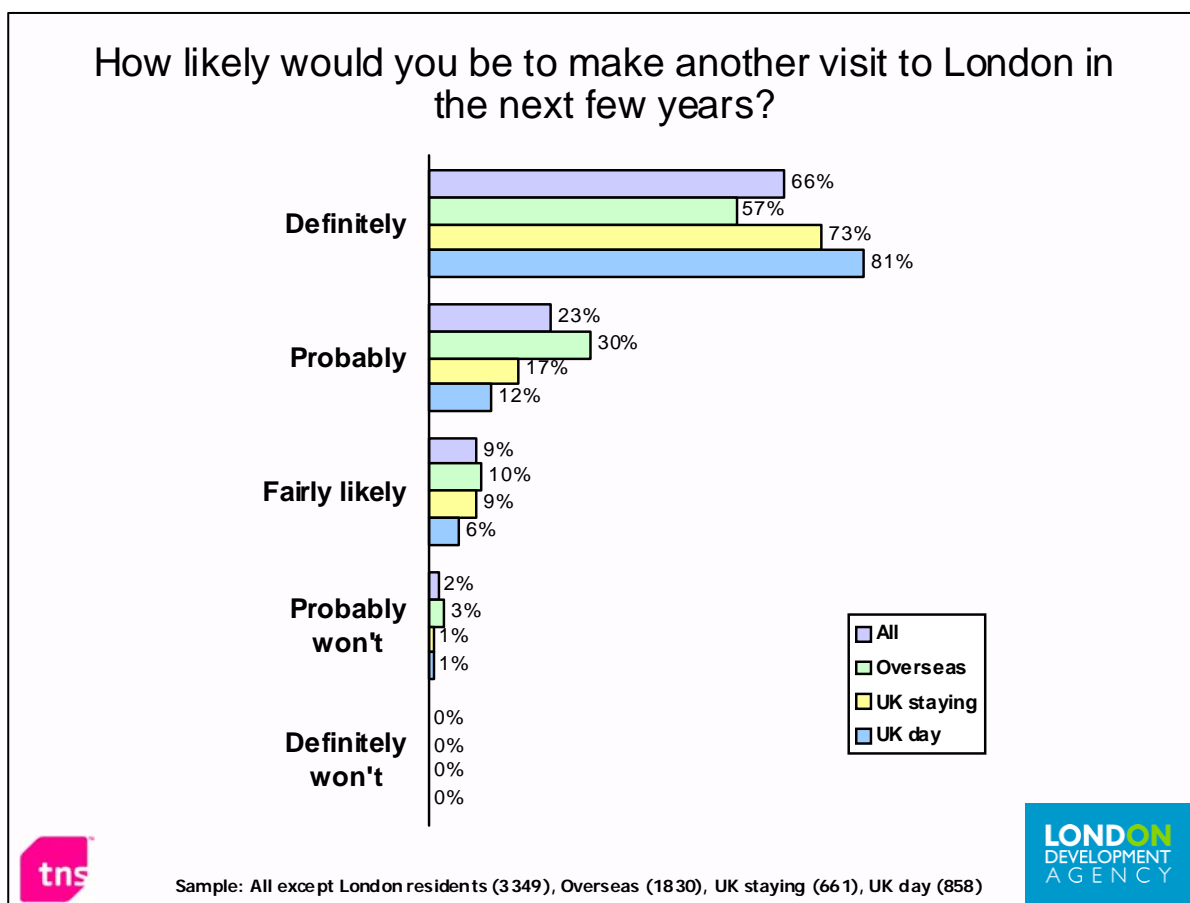


Overall, around a quarter (24%) said that London was **excellent** compared to other key destinations. A further 68% stated that the capital was **very good** (41%) or **good** (27%). Negative attitudes to London were minimal, with only 5% rating it as **fair** and 2% as **poor** when compared to other major cities as a place for a holiday or leisure break.

Overseas visitors were the most positive about London as a destination for a holiday or leisure break, with 70% rating London as either **excellent** or **very good**. The comparative figures for UK staying visitors, UK day visitors and London residents were 67%, 63% and 59% respectively.

Please note: 'Don't Know/Haven't visited any' was the response from a very small percentage of those questioned.

Likelihood of repeat visits



Around two thirds of all visitors (66%) stated that they would **definitely** visit London again in the next few years. An additional 23% indicated they would **probably** return, while 9% were **fairly likely** to do so. No one interviewed said they **definitely would not** return to London in the next few years, although 2% **probably would not**.

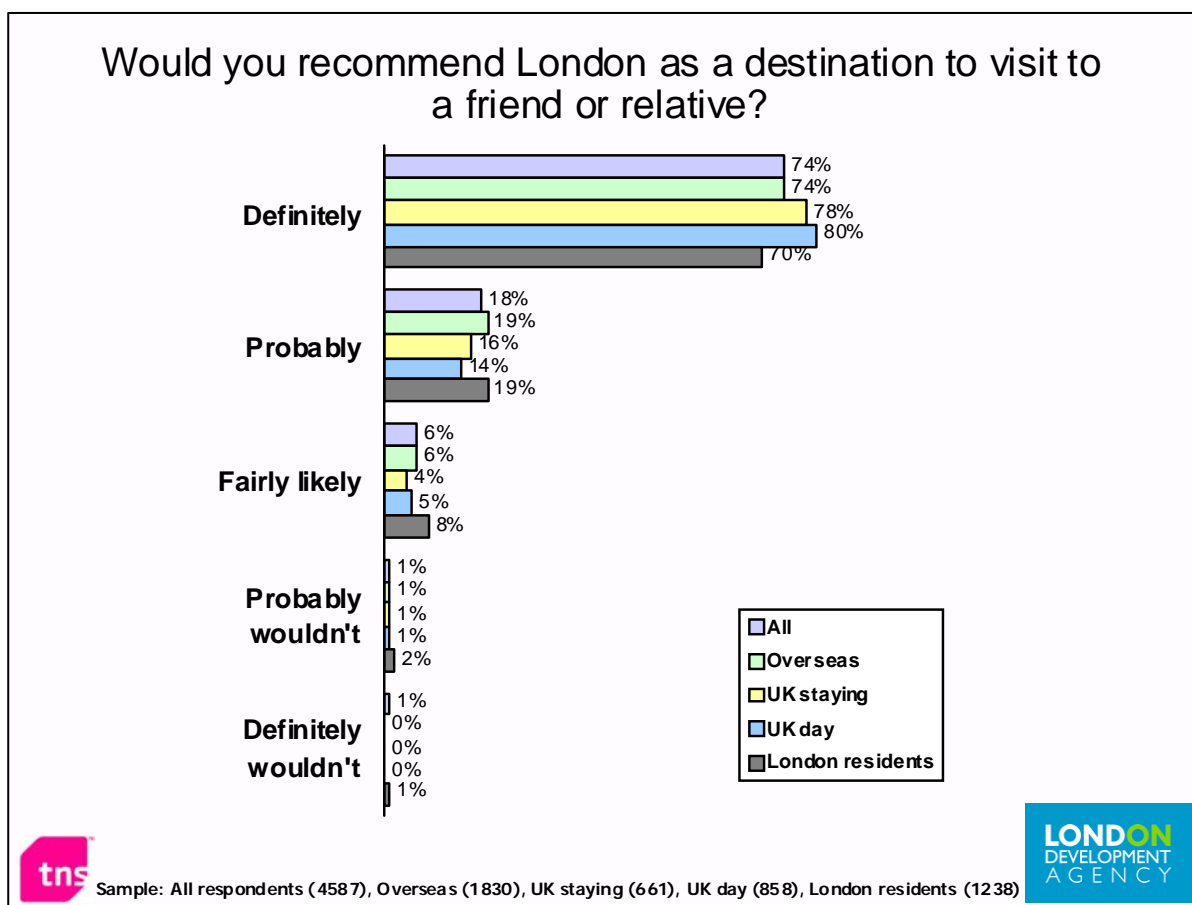
Most likely due to ease of access, more UK domestic visitors indicated that they would **definitely** return to London in the next few years - 73% of UK staying visitors and 81% of UK day visitors, compared to a little over half of overseas visitors (57%).

Just under a third of overseas visitors considered that they would **probably** return to London (30%), with the comparative figures for UK staying visitors and UK day visitors at 17% and 12% respectively.

Around 10% of overseas visitors, 9% of UK staying visitors and 6% of UK day visitors indicated that they would be **fairly likely** to return to London, with very few who **probably would not** return to the capital.

Please note: London residents were not asked this question.

Likelihood to recommend London

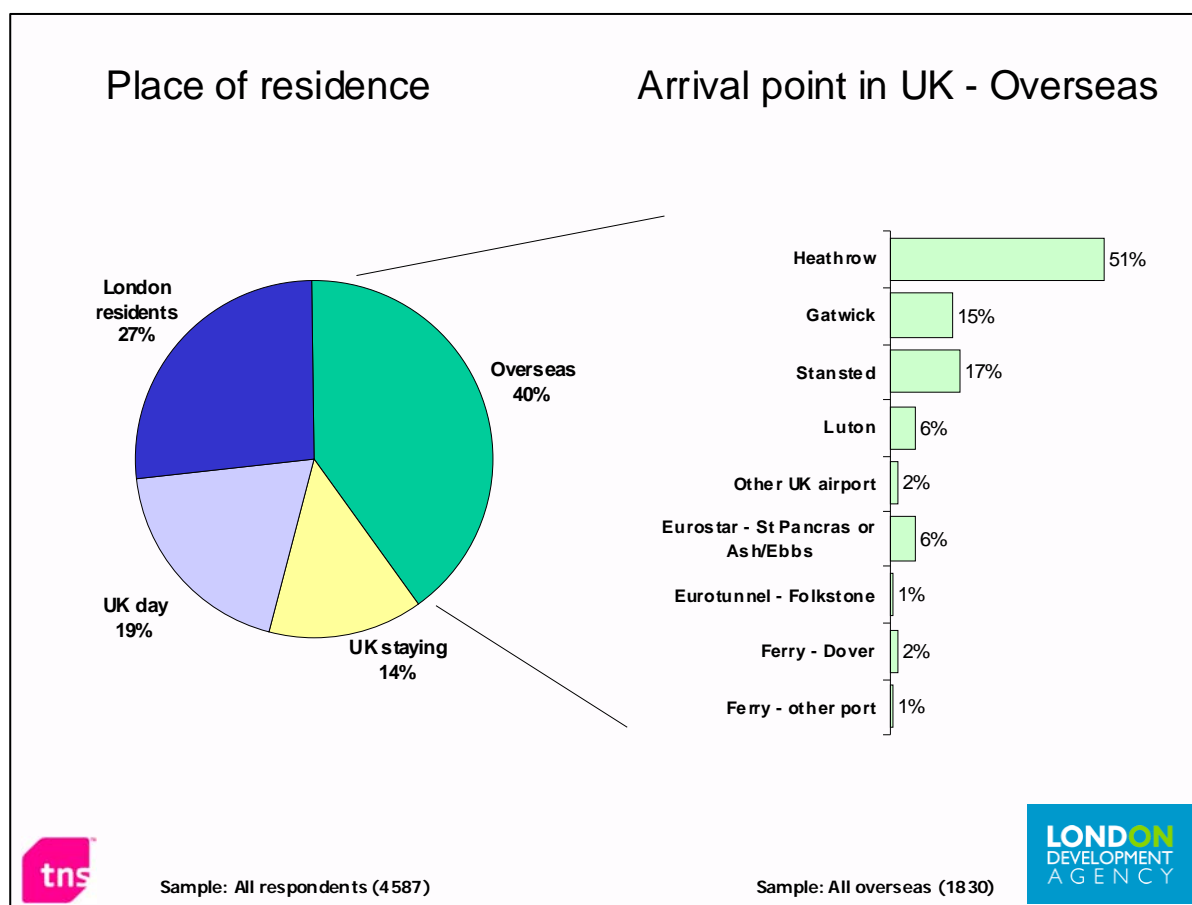


Almost three-quarters of all visitors (74%) said that they would **definitely** recommend London as a place to visit to a friend or relative, while an additional 18% indicated that they would **probably** do so.

There was a small difference in results by visitor type, with UK day visitors (80%) and UK staying visitors (78%) more likely to **definitely** recommend London as a place to visit, compared to overseas visitors and London residents (74% and 70% respectively).

Appendix – Visitor profiles

Residency/Arrival point

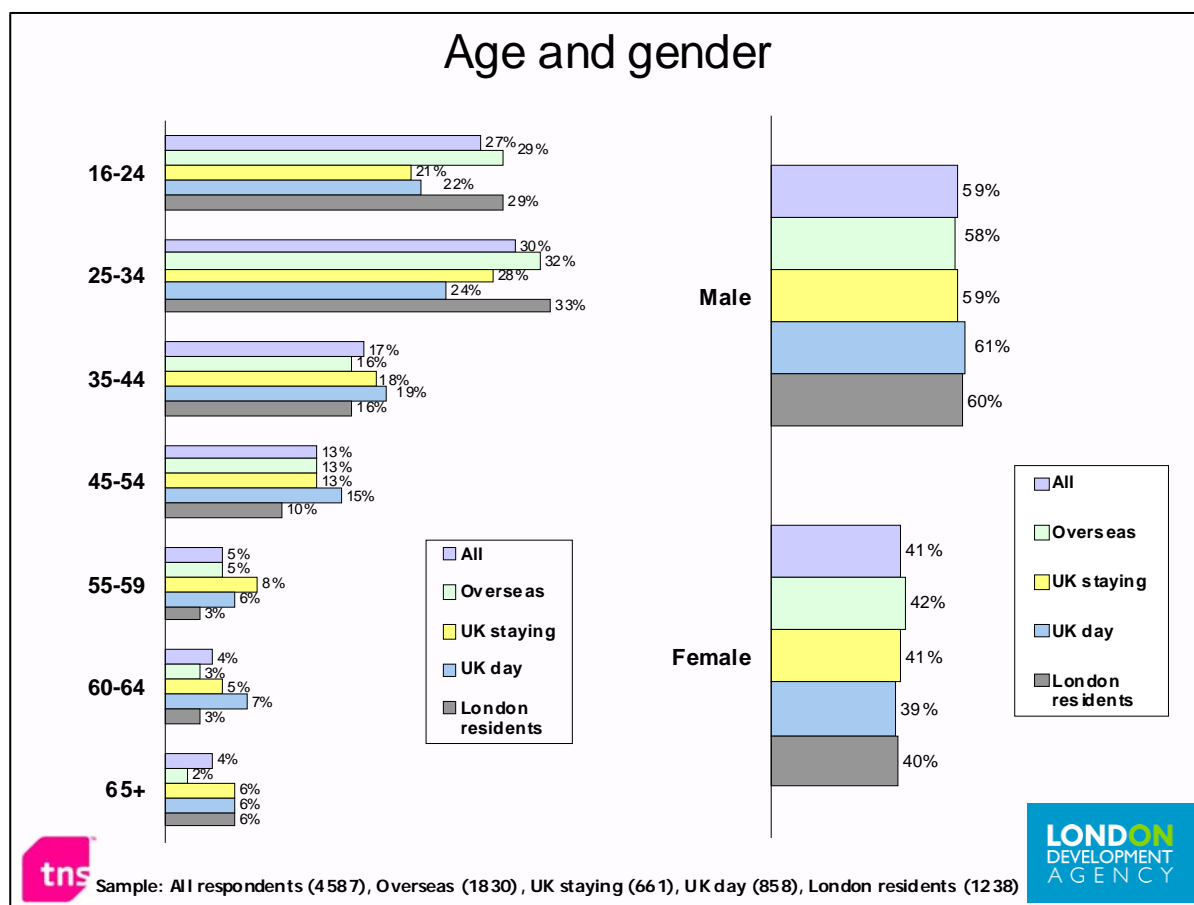


The overall sample size for London visitors in 2008 was 4587. **Overseas** visitors accounted for 40% of all those interviewed, while 14% were **UK staying** visitors. The remainder of the sample consisted of day visitors – both **London residents** (27%) and **UK day visitors** from other parts of the UK (19%).

Heathrow Airport was the most frequently used entry point into the UK among overseas visitors (51%). **Stansted** and **Gatwick** were the next most commonly used entry points at 17% and 15% respectively. Around 8% of overseas visitors flew into **Luton** and **other airports**.

A small minority arrived in London as passengers on **Eurostar** train services (6%) and a similar number used **Eurotunnel** or **ferry** services (4%).

Age and gender



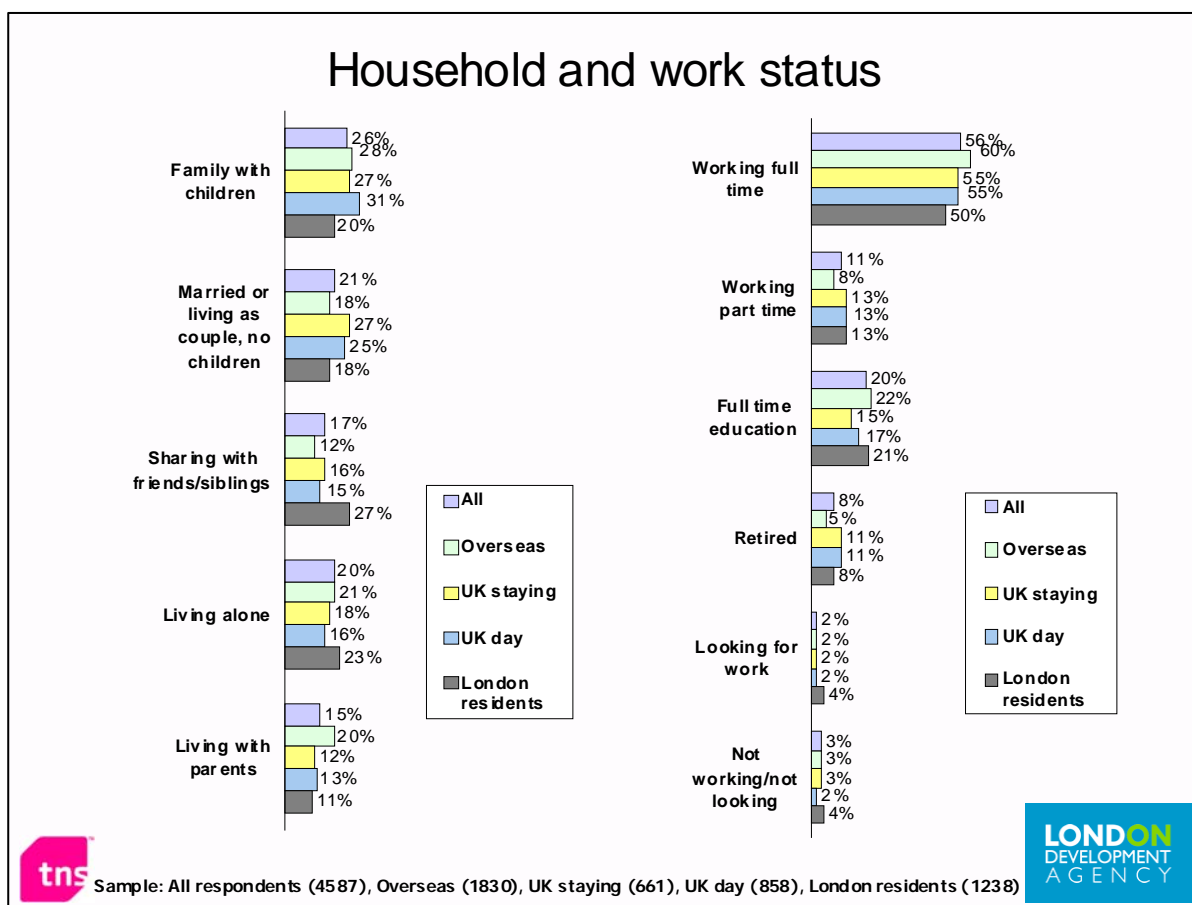
London visitors had a relatively young profile, with more than half of all those interviewed aged **under 35 years** (57%).

Overseas visitors (61%) and London residents (62%) both had a relatively young profile with more than half aged **under 35yrs**.

However, UK staying visitors and UK day visitors tended to be older, with half or more (50% and 53% respectively) aged **35yrs or over**.

Overall, **men** were more prevalent than **women**, at 59% and 41% respectively. This pattern was reflected in each of the different visitor segments.

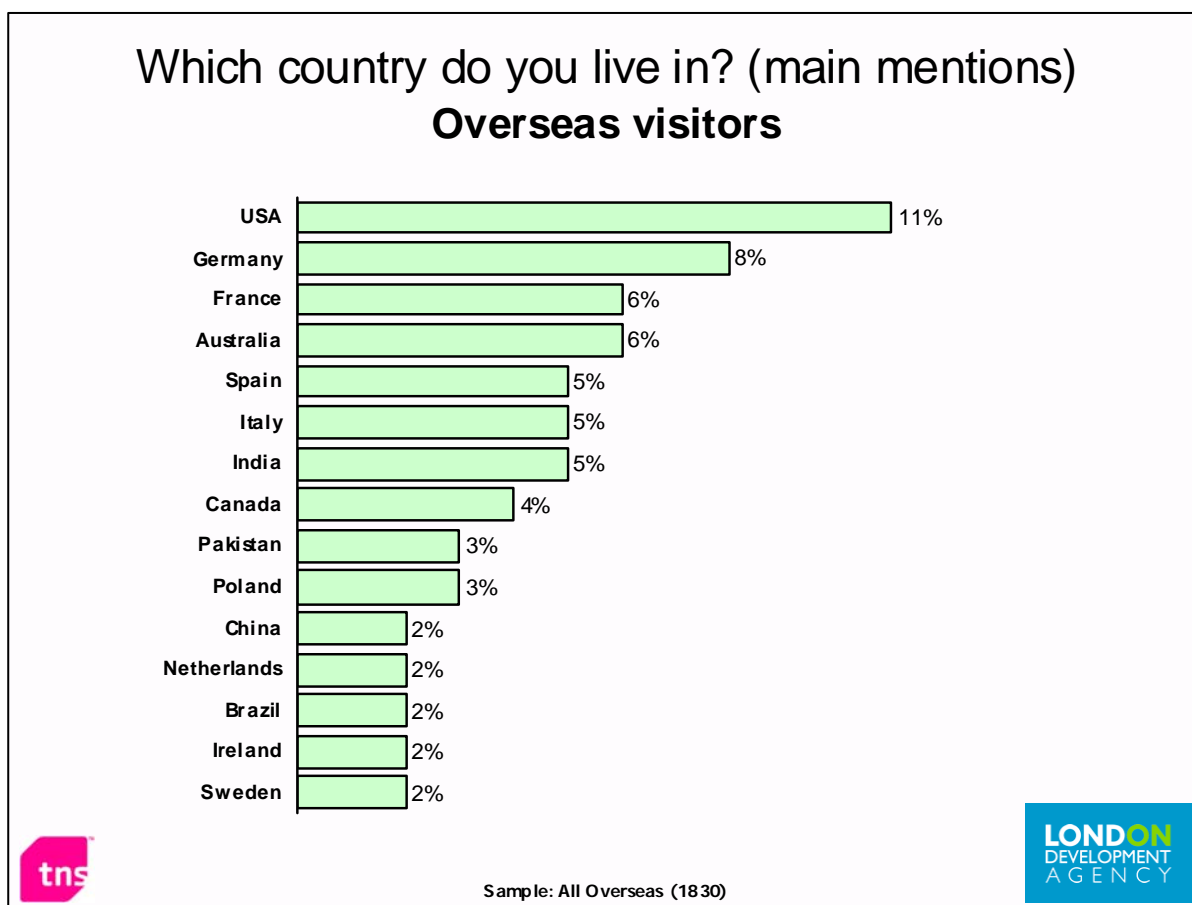
Household and work status



At 26%, **families with children** were the largest household category overall, followed by those who were **married/living as a couple but without children** (21%) and those who **lived alone** (20%). Those who **shared with friends/siblings** accounted for 17% of the sample, while 15% **lived with parents**. The different visitor segments generally reflected the overall pattern, with the exception of UK staying visitors who were equally most likely to be from **families with children** and **married/living as a couple but without children**, and London residents who were most commonly **sharing with friends/siblings**.

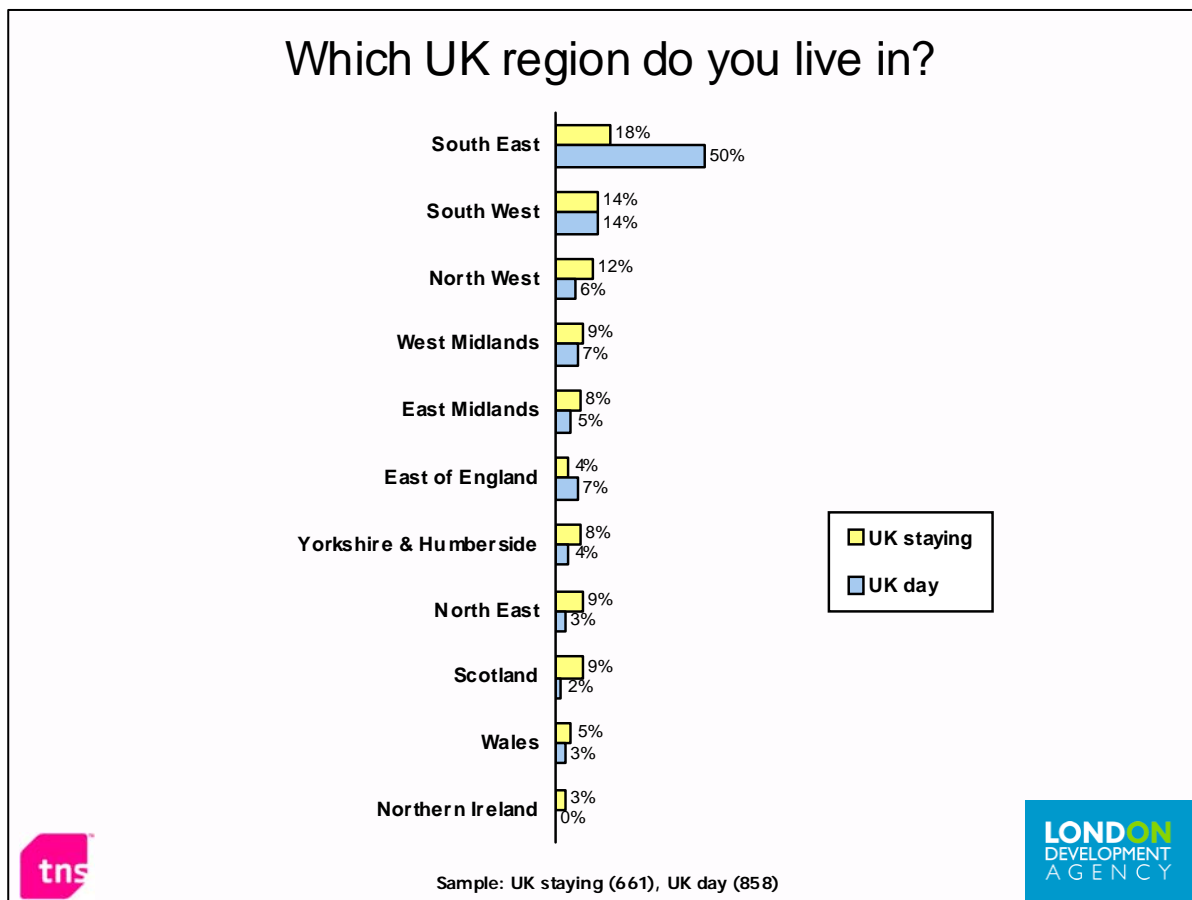
The majority of the sample were in **full time employment** (56%), ahead of those in **full time education** (20%), those **working part time** (11%) and **retirees** (8%). The same pattern was also evident among each of the different visitor segments.

Overseas visitor origins



Among the overseas visitors, 11% resided in the **USA**, followed by **Germany** (8%). The next most frequently mentioned countries of origin were **France** (6%), **Australia** (also 6%), **Spain**, **Italy**, and **India** (all 5%). **Canada** accounted for 4% of the overseas visitors surveyed, while 3% came from both **Pakistan** and **Poland**.

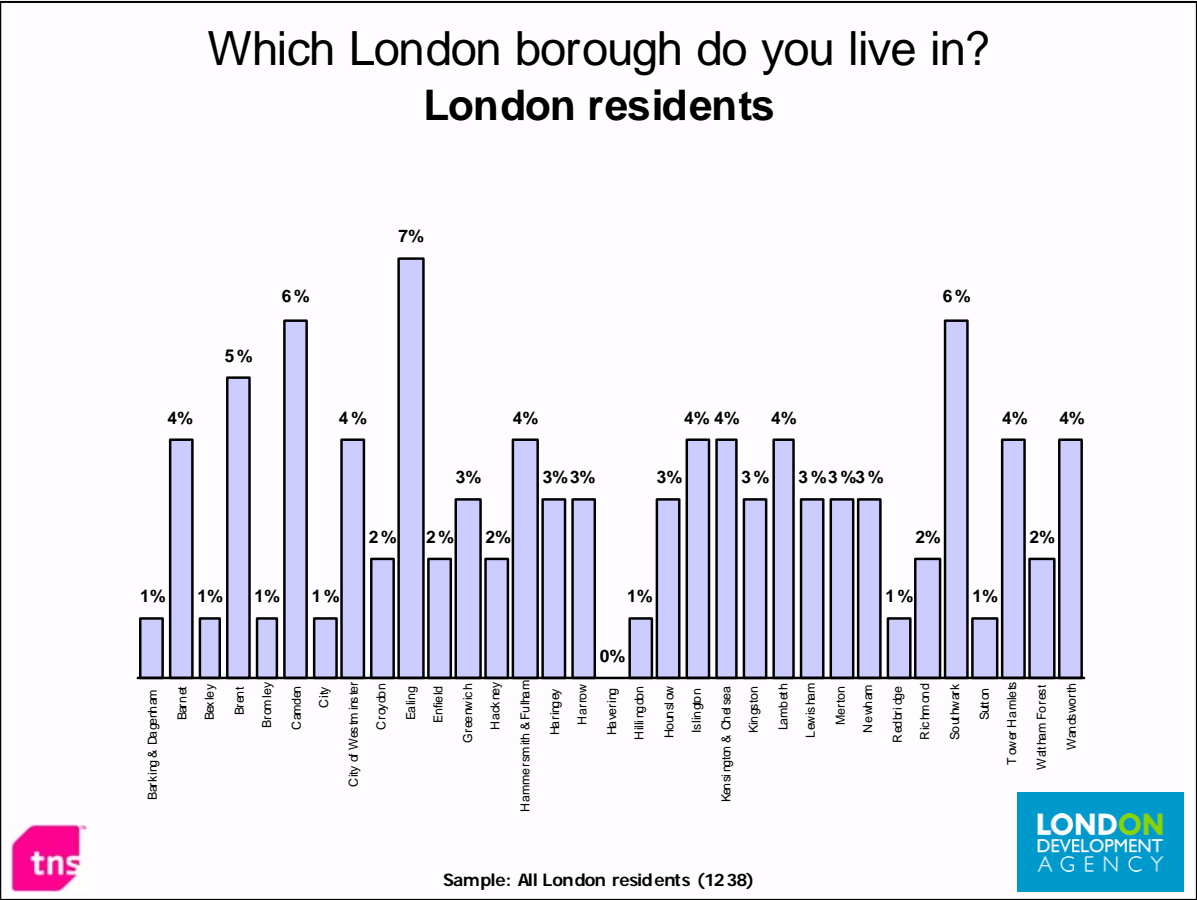
UK visitor origins



At 18%, the largest proportion of UK staying visitors resided in **South East England**. The next most frequently mentioned regions of origin were **South West England** (14%), **North West England** (12%), **West Midlands** (9%), **North East England** (9%) and **Scotland** (also 9%).

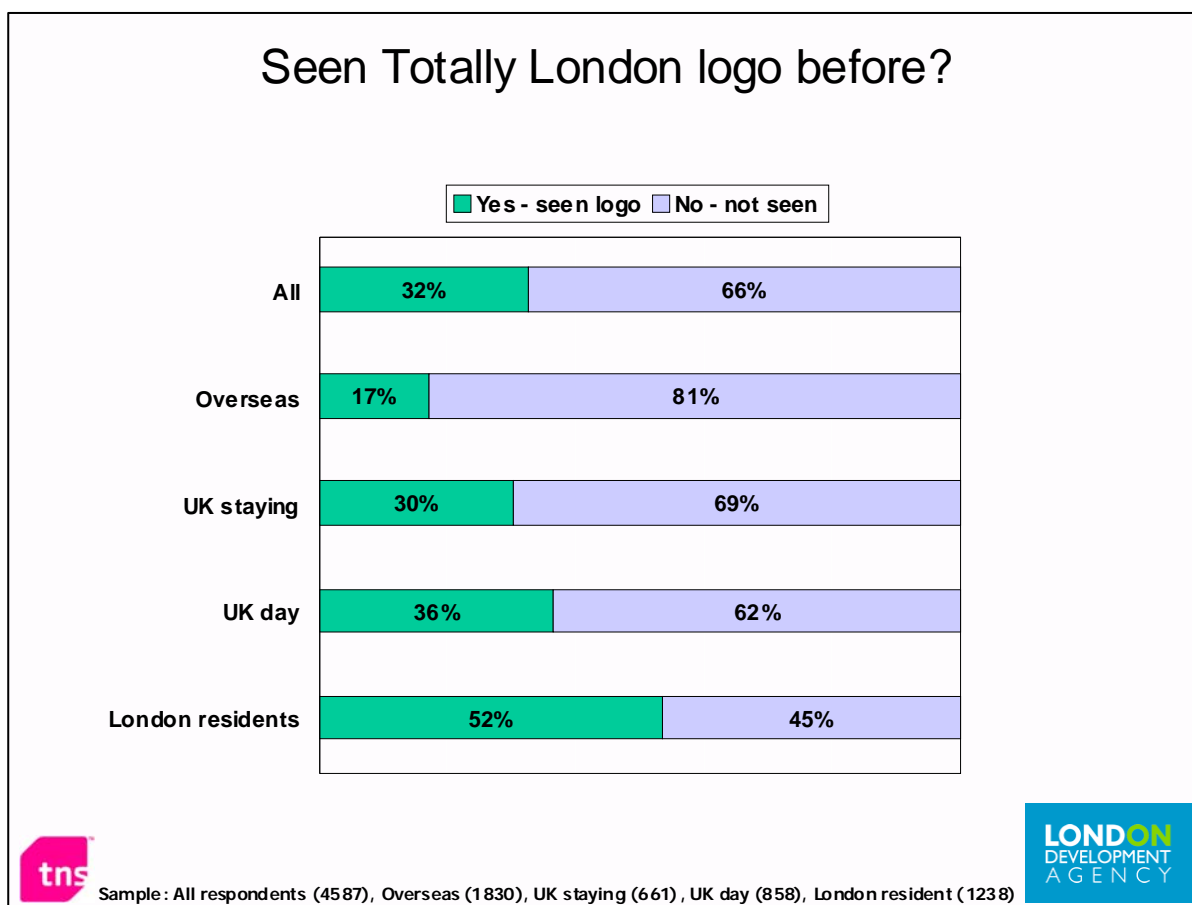
The majority of UK day visitors came from **South East England** (50%). The next most common regions of origin were **South West England** (14%), **West Midlands** (7%), **East of England** (also 7%) and **North West England** (6%).

London resident origins



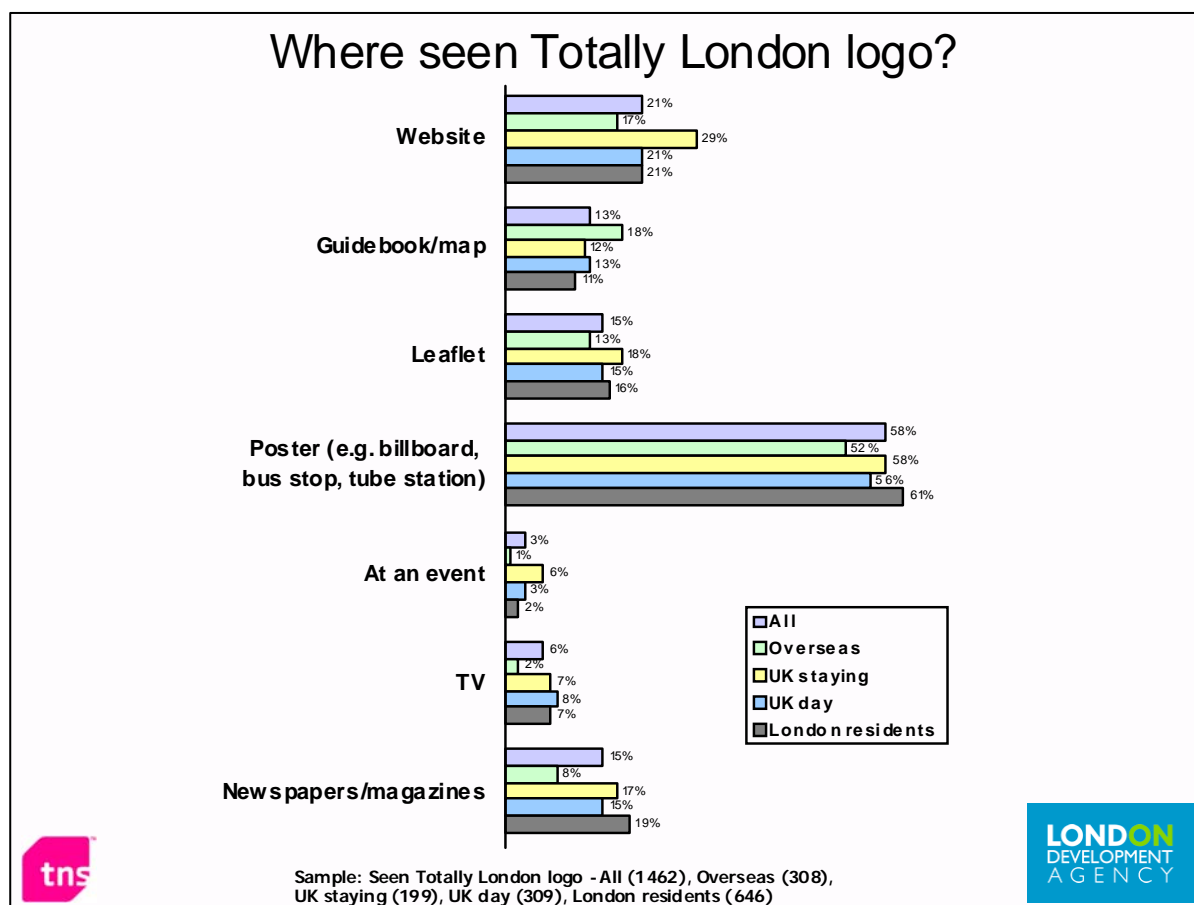
London residents were asked where they lived. The majority of London boroughs were represented, but the outer London boroughs (and City) tended to have a lower level of response. The boroughs that were home to 4% or more of this visitor segment were Barnet, Brent, Camden, City of Westminster, Ealing, Hammersmith & Fulham, Islington, Kensington & Chelsea, Lambeth, Southwark, Tower Hamlets and Wandsworth.

Totally London – advertising awareness



Almost a third of all London visitors (32%) recognised the Totally London logo. As expected, the logo was recognised most often by London residents (52%), ahead of UK day visitors (36%), UK staying visitors (30%) and overseas visitors (17%).

Totally London – advertising awareness



Among all those who had seen the Totally London logo, at 58%, the predominant source of this awareness was a **poster (e.g. billboard, bus stop, tube station)**. The next most likely sources of awareness were on a **website** (21%), **leaflets** (15%), **newspapers/magazines** (also 15%), **guidebooks/maps** (13%), **TV** (6%) and **at an event** (3%).

Among all visitor segments, **poster** was the most frequently mentioned source of awareness of the Totally London logo, followed by **websites**. The only exception to this was among overseas visitors, who mentioned **guidebooks/maps** slightly more frequently than **websites**.

Appendix – TRI*M Analysis

Further analysis of visitor satisfaction, recommendation, likelihood to visit again and rating against other destinations (TRI*M)

TRI*M is a management information system used for measuring, monitoring and managing relationships with customers or, as in the case of destinations such as London, visitors. The TRI*M analysis featured within the LVS is derived from the answers provided to four key questions, namely:

Q.A Thinking about this visit to London, how would you rate London overall as a place to visit?

Excellent, Very good, Good, Fair, Poor

Q.B How likely would you be to make another visit to London in the next few years?

Definitely, Probably, Fairly likely, Probably won't, Definitely won't

Q.C Would you recommend London as a destination to visit to a friend or relative?

Definitely, Probably, Fairly likely, Probably wouldn't, Definitely wouldn't

Q.D How would you rate London as a place to visit for a holiday or leisure break compared to other major cities?

Excellent, Very good, Good, Fair, Poor, Don't know/haven't visited any others.

Apart from producing very interesting data in their own right, the responses to these questions are processed together to produce two particular analysis outputs, namely:

- The TRI*M Index
- The TRI*M Typology

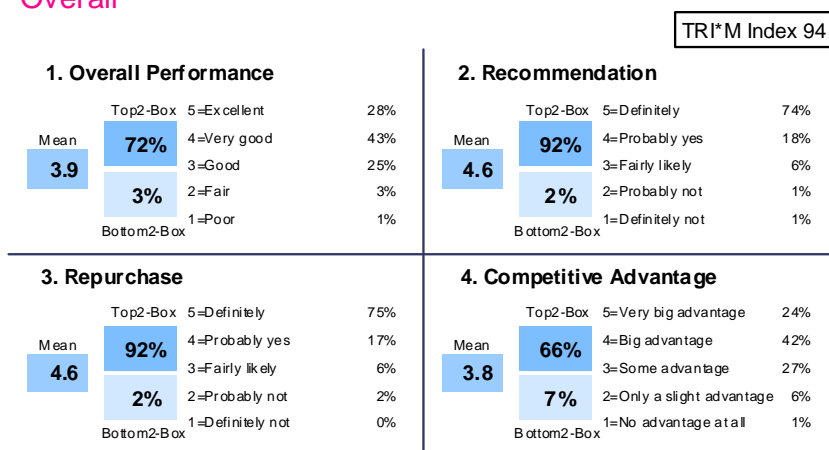
The following section summarises the TRI*M Index scores and TRI*M typology results for January to December 2008.

The TRI*M Index

The TRI*M Index is a single number score that measures the level of visitor or customer retention. It provides a very useful measurement of customer satisfaction and loyalty that can be tracked over time and compared with other destinations (where similar data is available). In January to December 2008, the overall TRI*M Index score was **94**.

TRI*M Index Questions - Annual 2008 (Jan-Dec)

Overall

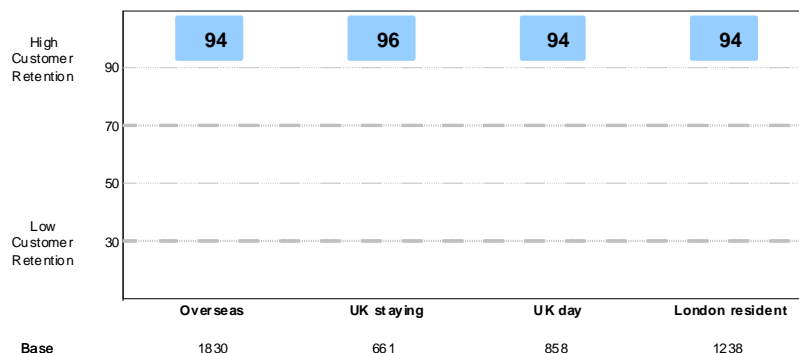


Base 4587

As the TRI*M Index score is calculated for each individual respondent, these results can be aggregated to produce scores for different market segments, as shown in the chart below. While the results for UK day visitors and London residents are stable on last year, the scores for Overseas and UK staying visitors have risen by 3% to 94% and by 2% to 96% respectively.

TRI*M Index - Annual 2008 (Jan-Dec)

Type



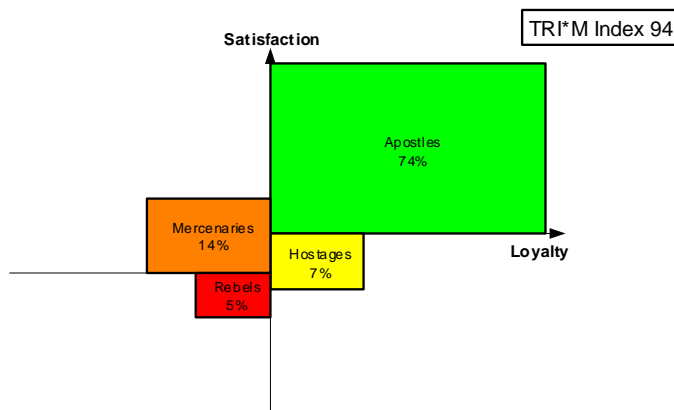
TRI*M Typology

The four questions outlined previously which are used to produce the TRI*M Index scores are also designed to produce a measurement of Satisfaction and Loyalty – A and C are considered to be Satisfaction questions and B and D as the Loyalty questions. The aggregated scores for these combinations of questions are then mapped alongside each other to produce a Typology which is used to describe four relationship types amongst visitors or customers, namely:

- Apostles – with high scores on both Satisfaction and Loyalty, they are likely to return to the destination and actively recommend it to others;
- Hostages – higher scores on Loyalty than Satisfaction, they are likely to make a return visit but often because there is a reason for them doing so, for example, for family or business reasons, but they are not particularly satisfied with the destination and what it has to offer;
- Mercenaries – they record relatively high scores in terms of Satisfaction but not to the same extent on the Loyalty measures; they may be someone who is always on the lookout for a ‘good deal’ or indeed, is the type of person who does not particularly like returning to the same destination;
- Rebels – they record relatively low scores on both Satisfaction and Loyalty and may well have had a poor visitor experience; apart from being unlikely to make a return visit themselves, there is a real danger that this type of visitor will criticise the destination to other people and dissuade them from visiting.

The percentage of visitors in the Apostles segment increased to 74% (up from 71% a year ago), with a decrease in the proportion of visitors in the Hostages segment from 9% to 7%.

TRI*M Typology - Annual 2008 (Jan-Dec)
Overall



Base 4587