

Visitor Segmentation Presentation

July 2013

TfL number: 12271

SPA number: 1513



Putting the data into perspective

Visits to London



SPA-FT
data: 1637



SPA-FT
data: 750



Putting the data into perspective

Visitors to London *

GBDVS 2011/UKTS:
TOTAL Non Londoner visitors: 32.84m visitors

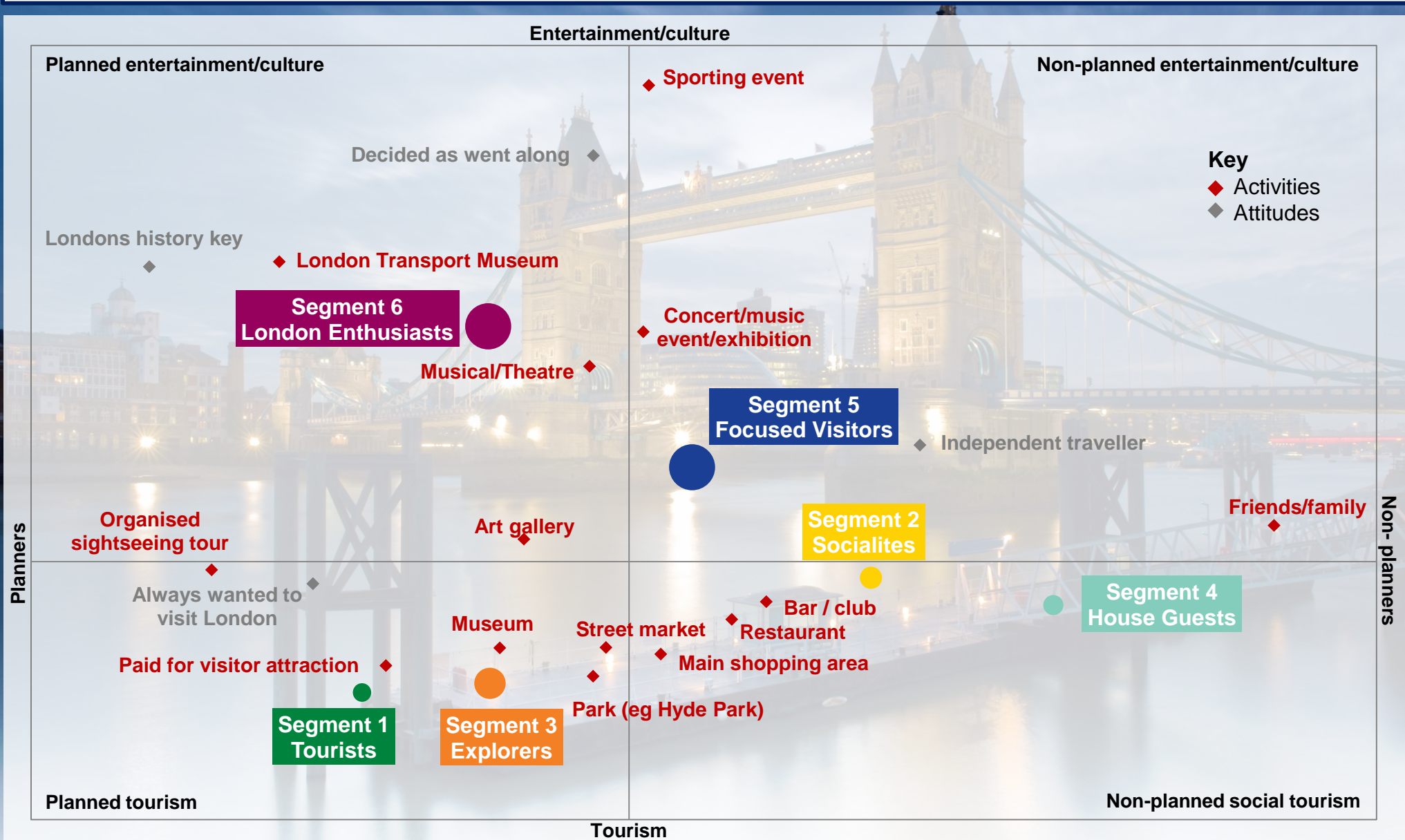


Country/Region	Average number of visits a year
UK	3.84
International	1.53
Europe Net	1.55
Poland	2.44
France	1.78
Ireland	1.70
Spain	1.44
Netherlands	1.41
Italy	1.29
Germany	1.25
Rest of the world Net	1.48
China	1.86
USA	1.40
Australia	1.38
Brazil	1.34

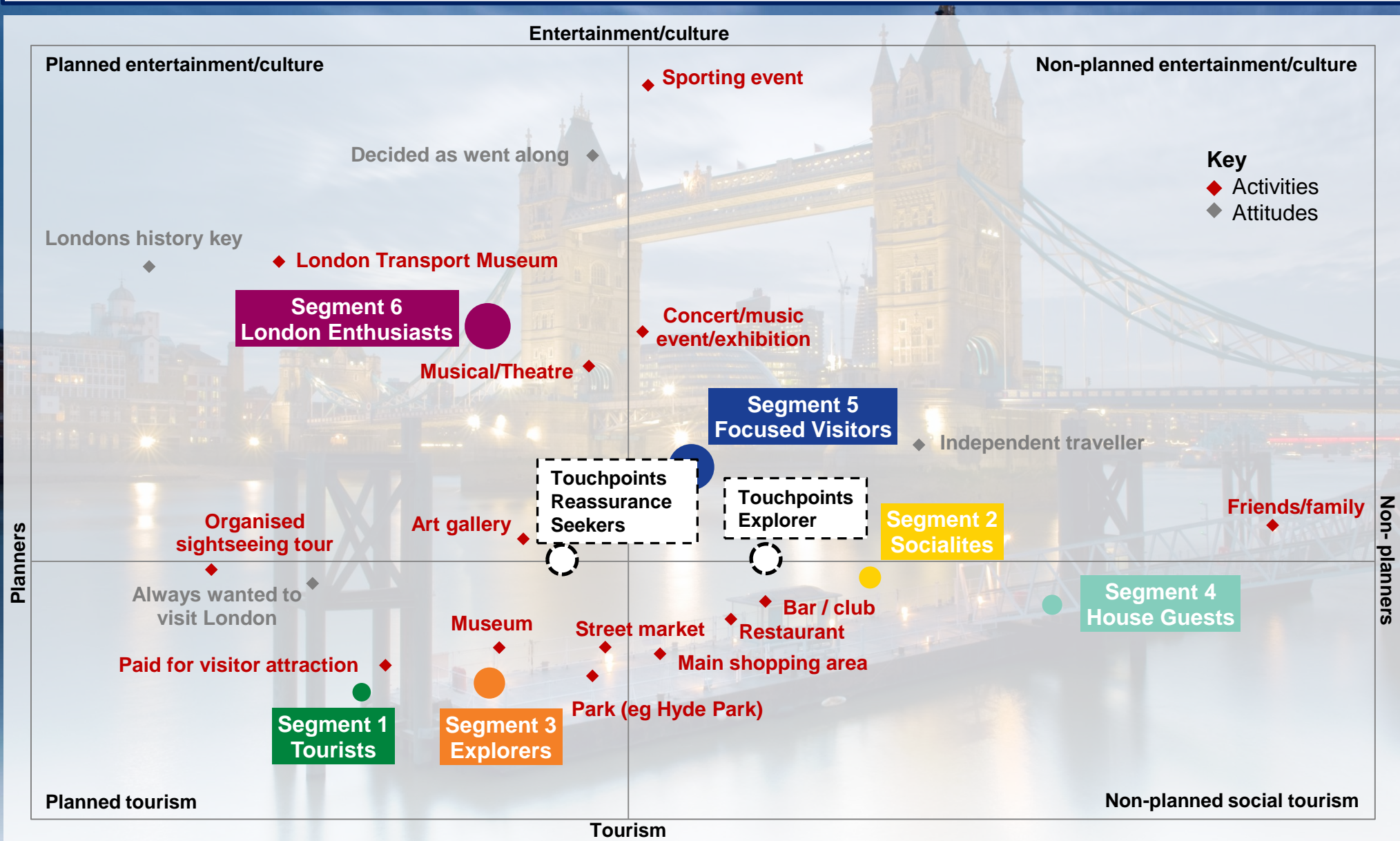
Average amongst those visiting London in the last year

*Figures were calculated using number of visits from the GBDVS 2012/GBTS 2012/IPS 2012 / avg number of visits from our survey

Introducing the visitor segmentation



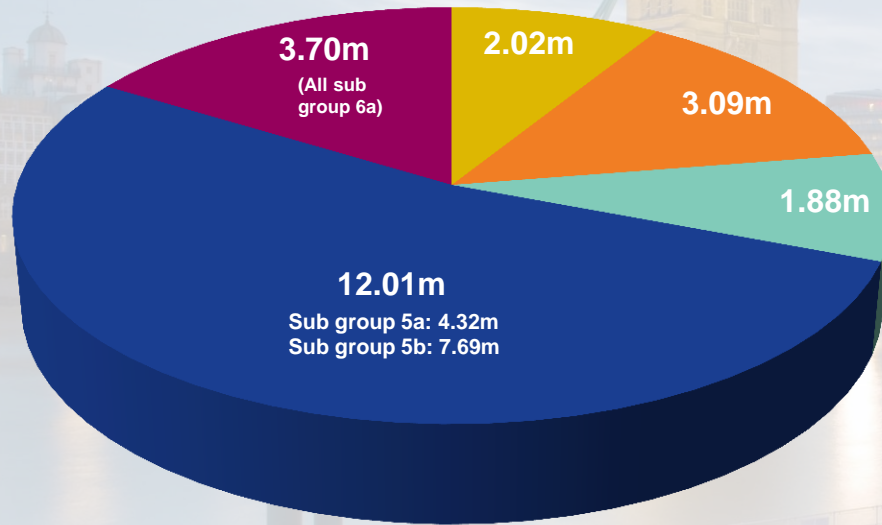
Introducing the visitor segmentation



Putting the segments into perspective

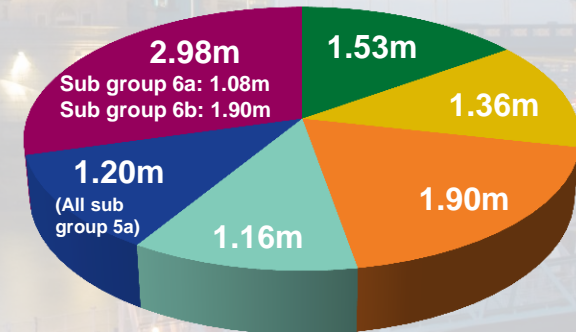
UK Visitors to London

TOTAL: 22.71m visitors



International Visitors to London

TOTAL: 10.13m visitors



Segment 1
Tourists

Segment 2
Socialites

Segment 3
Explorers

Segment 4
House Guests

Segment 5
Focused Visitors

Segment 6
London Enthusiast

Touchpoints
Reassurance
Seekers

Touchpoints
Explorer

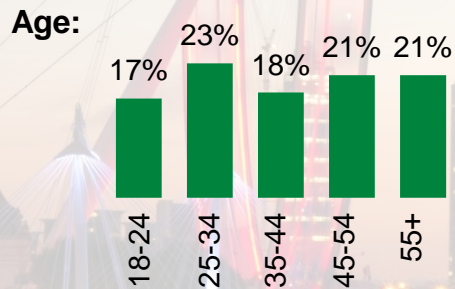
Segment 1 – Tourists

Tourists are planners who come to the Capital for holiday, in groups and do many tourist style activities while here. Have always wanted to visit, view it as a once in a lifetime trip and best city for sightseeing. Tend to stay an average 5 nights in hotels and spend large amounts while here.

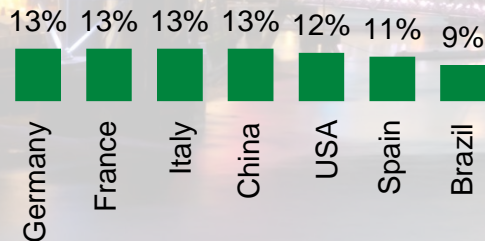
Demographics

Gender  43%  57%

Have children 38% **No children** 60%



Country visiting from:




International only segment
Country visiting from shown if 8% or above

Pre - arrival


Pre-planners

64%

Research / book various aspects:  transfers

Plan travel around London

52%

Sources used:  Tour operator

(+23% by someone else)

Arrival

Travel in groups.. ..by plane or coach..



..for holiday..



Stay avg.  **5** nights in  Hotel (3/4/5*)

At destination transport

High spend



Ave. £207 a day, £998 a trip

Ticketed activities:



Non-ticketed activities:



Plan / research ticketed and non-ticketed activities before and during trip

Tickets used:





Positive perceptions of driving in London

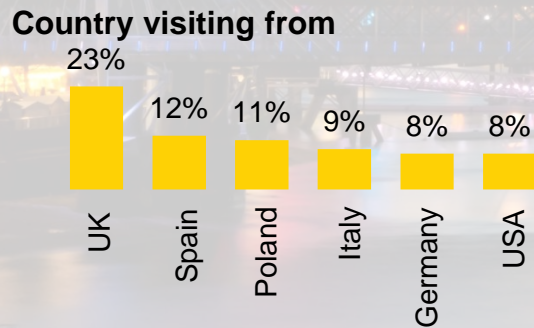
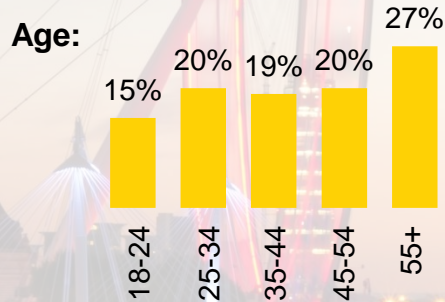
Segment 2 – Socialites

Socialites come to London alone to visit friends/family. Do many social, non-ticketed activities whilst in London. Plan things on the go rather than in advance. Stay an average 6 nights with friends/family and rely heavily on public transport.

Demographics


Gender  47%  53%

Have children 26% No children 72%



Country visiting from shown if 8% or above

Pre Arrival / Planning

Tend to plan on the go 

Use own device via wifi to research in London



Arrival

Travel alone..  ..by plane.. 




..to visit friends/family 

Stay avg.  6 nights with 


Pre Arrival / Planning

Mid spend  Average £126 a day, £556 a trip

Ticketed activities:  Concert / music event / exhibitions

Non-ticketed activities:   (Shops)   (Street market)  

Plan / research non-ticketed before and during trip

Heavy public transport user, particularly of Tube 

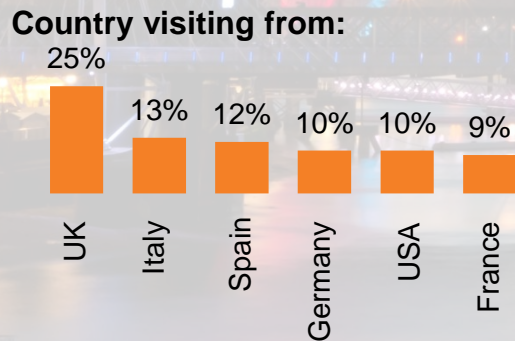
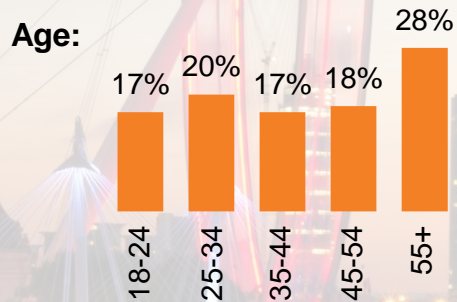
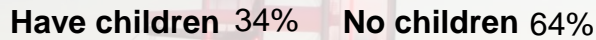
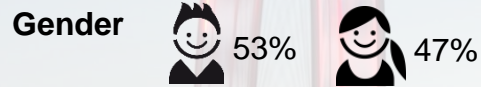
Tickets used:  PAYG Oyster card

Positive perceptions of public transport

Segment 3 – Explorers

Explorers research a lot about their trip in advance but allow themselves flexibility by not booking. They travel as a couple and get to the Capital by coach or train where they then stay in lower cost accommodation for average 5 nights. They are interested in tourist activities such as visitor attractions but also do a lot of non-ticketed/entertainment activities whilst here.

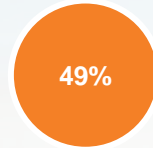
Demographics



Country visiting from shown if 8% or above

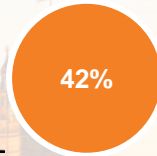
Pre Arrival / Planning

Pre-planners



Research a lot but unlikely to book (except accommodation which book)

Plan travel around London



Sources used:



Arrival

Travel as a couple.. ..by train or coach..



..for holiday



Stay avg. 5 nights in Hotel (up to 3*)

At destination

Mid spend

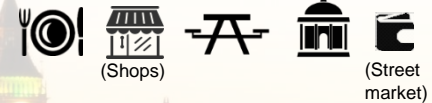


Average £167 a day, £778 a trip

Ticketed activities:



Non-ticketed activities:



Plan / research activities before and during trip – but unlikely to book before trip

Heavy public transport user, particularly of Tube



Transport tickets used:





Positive perceptions of public transport in London – particularly view it as iconic

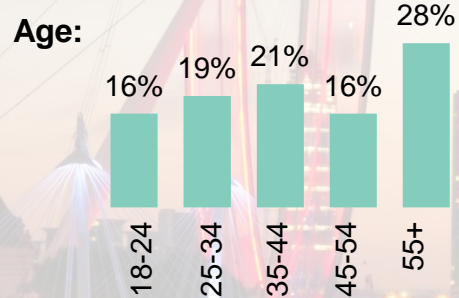
Segment 4 – House Guests

House guests don't plan their trip at all. They travel alone in their own vehicle to visit friends/family or for business and have been more than average number of times. They don't spend a lot and do few activities whilst here, staying at friends/family homes.

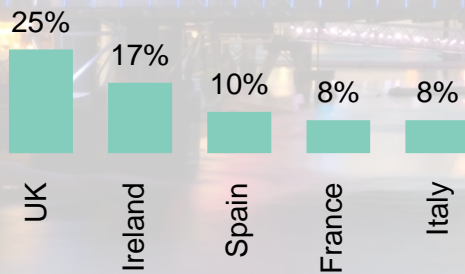
Demographics

Gender  57%  43%

Have children 33% **No children** 65%



Country visiting from:



Country visiting from shown if 8% or above

At destination

Don't plan their trip at all - in advance or on the go

Don't plan travel at all – already know what they're doing

Low spend



Average £127 a day, £467 a trip

Ticketed activities:



Non-ticketed activities:



Do not plan / research any activities

Lower public transport user, particularly of Tube

Tickets used:



PAYG Oyster card

Lower positive perceptions of public transport in London

One of most likely segments to drive in London – using **own car**



Arrival

Travel alone..



..by their own vehicle..



..to visit friends/family or for business



Stay avg. 4 nights with



More frequent visitors to London - average 8.38 visits in 5 years

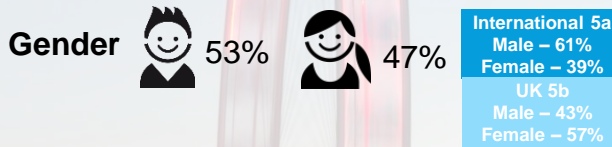
Segment 5 – Focused Visitors

International 5a

UK 5b

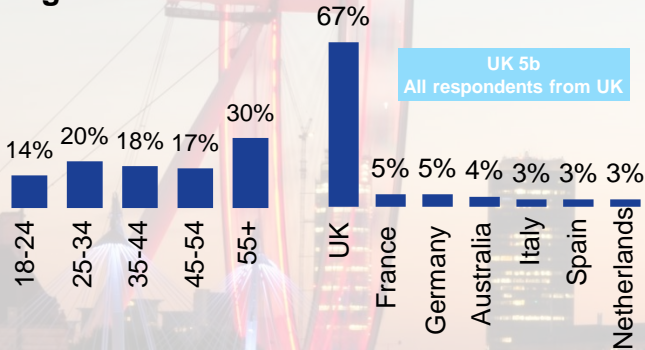
Focused visitors plan their trip in advance with one or two key things in mind. They don't plan their travel around London but do purchase their tickets in advance. They travel alone, spend least, do least and stay for the shortest time.

Demographics



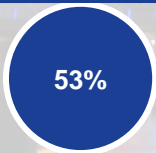
Age:

Country visiting from:



Pre Arrival / Planning

Pre-planners



Planning focused on specific thing

Do not plan travel - already know what they're doing

But do purchase transport tickets in advance

Arrival

Travel alone..



International 5a

UK 5b

..by plane ..

..by train or their own vehicle..



International 5a

UK 5b

..for business

..to visit friends / family



International 5a

UK 5b

Stay avg.



nights in

Stay avg.



night with



Hostel



Most frequent visitors to London -average 11.31 visits in 5 years

At destination

Lowest spend



Average £107 a day, £294 a trip

Come with one or two specific activities in mind (mean of 2.42 activities in London)

Least likely to use public transport in London (78%)

Least positive about public transport in London

Also least positive about driving in London



Segment 6 – London Enthusiasts

Active 6a

Relaxed 6b

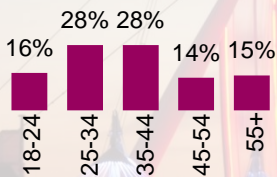
London Enthusiasts are the most positive group about London. They plan their trip both in advance and on the go using various resources. They travel in groups, stay for longest time, travel around and do a lot of activities whilst in London. Subgroup active 6a do more non-ticketed activities and stay in more up market accommodation than subgroup relaxed 6b

Demographics

Gender  55%  45%

Country visiting from:

Age:



Active 6a	Relaxed 6b
UK – 41%	France – 20%
China – 13%	USA – 20%
USA – 8%	Italy – 12%
Germany – 8%	Germany – 11%
Spain – 8%	Spain – 11%

Country visiting from shown if 8% or above

Pre Arrival / Planning

Pre-planners..

74%

..As well as on the go

72%

Using own device and shared computer

INTERNET CAFE



Don't plan travel around London but do purchase transport tickets in advance

Arrival

Travel as a group..



Active 6a

..by own car, hire car, train, coach



Relaxed 6b

..by hire car, coach



..for holiday



Stay avg.



nights in..

Active 6a

hotels of 4-5*



Relaxed 6b

hostel or B&B



At destination

Highest spend



Average £246 a day, £1,222 a trip

Active 6a

£1, 379 trip

Relaxed 6b

£1, 062 trip

Ticketed activities:

- **Everything**, particularly Active 6a

Active 6a

Relaxed 6b

Non-ticketed activities:

- **Active 6a** – everything
- Relaxed 6b - not so involved

Active 6a

Heavy public transport users and try different modes

(e.g. river boat, tram and Emirates Air Line)

Oyster more than others

(particularly **Visitor Oyster cards**)



Most likely to hire a car



Positive perceptions of driving in London

Touchpoints Reassurance Seekers

Overview of Reassurance Seekers


































- Can find Public Transport daunting
- Seek reassurance and advice en route
- Can find maps difficult to understand
- Try to stick to familiar routes and modes

Touchpoints Explorer




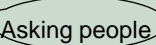


Overview of Touchpoints Explorer

- Plan on the go – little planning in advance
- Do not buy tickets in advance – discover different ticket types along the way
- Independent traveller – confidence fairly high
- Itinerary loose – not time pressured and adapts as they go

Segmentation overview - Arrival

	Segment 1 Tourists	Segment 2 Socialites	Segment 3 Explorers	Segment 4 House Guests	Segment 5 Focused Visitors	Segment 6 London Enthusiast
Travelling as...	 Group	 Alone	 Couple	 Alone	 Alone	 Group
Getting to London	  Plane Coach	 Plane	  Train Coach	 Own car	^A  ^B  Plane Train	^A   ^A Car Coach
Attitudes to London	Weekend destination Best for sightseeing Once in a lifetime trip		Best for sightseeing Once in a lifetime trip	Weekend destination		Weekend destination Best for sightseeing Once in a lifetime trip
Reasons for visiting	 Holiday/Leisure	 Friends/Family	 Holiday/Leisure	 Friends/Family  Business	^A  Business ^B  Friends/Fam	 Holiday/Leisure
Mean number of nights	5	6	5	4	^A 4 ^B 1	7
Accommodation	 Hotel (3/4/5*)	 Friends/Family	  B&B Hotel (up to 3*)	 Friends/Family	^A  Hostel B&B ^B  Friends/Fam	^A  Hotel (4/5*) ^B  Hostel B&B




























Segment overview – Pre-arrival / Planning

	Segment 1 Tourists	Segment 2 Socialites	Segment 3 Explorers	Segment 4 House Guests	Segment 5 Focused Visitors	Segment 6 London Enthusiast
Pre-planners (plan before they arrive)	✓		✓		✓	✓
Pre-planners book in advance	✗		✗			✓
	 Airport transfers		 Accommodation			Everything
Planners on the go (plan once they arrive)		✓				✓
Plan on the go, research online on the go		✓				✓
		Smartphone via wifi				All mobile devices and shared computer via wifi and mbl connection
Plan travel around London	 Tour operator  Asking people ✓		 Maps  Hotel staff ✓			
Advance Public Transport ticket purchasers					A Multiple travel card on Oyster, Visitor Oyster card	B Oyster card, single /return tickets, One day travel card
					✓	✓

Segmentation overview - At destination activities

	Segment 1 Tourists	Segment 2 Socialites	Segment 3 Explorers	Segment 4 House Guests	Segment 5 Focused Visitors	Segment 6 London Enthusiast
Highest average spend per trip						A B £1,379 £1,062
Ticketed activities	 Paid for visitor attraction / organised sightseeing tour	 Concert / music event / exhibition	 Paid for visitor attraction			 A Everything
Planning / researching ticketed activities	 Before and during trip		 Before and during trip			A Before and during trip
Non ticketed activities	 Restaurants, shops, park, street market, museum	 Restaurants, shops, park, street market, bar / club, visit friends / family	 Restaurant, shops, park, street market, museum	 Restaurant, visit friends / family		A B Everything Art gallery London Transport Museum
Planning / researching non-ticketed activities	 Before and during trip	 Before and during trip	 Before and during trip			A Before and during trip

Segmentation overview - At destination transport

	Segment 1 Tourists	Segment 2 Socialites	Segment 3 Explorers	Segment 4 House Guests	Segment 5 Focused Visitors	Segment 6 London Enthusiast
Heavy public transport users		 	 			    
Tickets used						
Perceptions of public transport			Iconic 		Frustrating 	
Drive in London		 Own car 		 Own car 		 Hire car. Most likely to research and book hire car 
Perceptions of driving in London					 Frustrating / Dangerous / Unreliable	

Pre Arrival - Marketing / Commercial summary

Marketing

Research findings

Plan travel in advance:



Purchase tickets in advance:



Plan trip on the go:



Opportunities

- Highlight ticket options in research sources - maps, guidebooks, TfL website, tour operators and hotels
- Oyster cards to London Enthusiasts, who book tickets in advance and stay longer
- The TfL website and wifi options within stations could be further promoted

Commercial

Research findings

Plan trip before getting to London:



Plan trip on the go:



Opportunities

- TfL association with accommodation and attraction websites as well as airport transfer companies



- Attraction websites and sites related to restaurant searches



Arrival and Destination - Marketing summary

Marketing

Research findings

Travel in larger groups:	Segment 1 Tourists	Segment 6 London Enthusiast		
Stay longest time in London:	Segment 2 Socialites	Segment 6 London Enthusiast		
View London as weekend destination:	Segment 1 Tourists	Segment 4 House Guests	Segment 6 London Enthusiast	
Heavy public transport users:	Segment 2 Socialites	Segment 3 Explorers	Segment 6 London Enthusiast	
Low public transport users: (also most negative about transport in the Capital)		Segment 5 Focused Visitors		
Do most activities in London:	Segment 1 Tourists	Segment 2 Socialites	Segment 3 Explorers	Active 6a
Drive hire car to London:		Segment 6 London Enthusiast		
Drive own car to London:	Segment 4 House Guests	UK 5b	Active 6a	

Marketing opportunities

- Group/family multiple day travel cards
- Multiple days on Oyster
- Weekend travel tickets
- Oyster cards and different transport mode options
- Highlight benefits of public transport
- Example public transport routes to take in top tourist and entertainment activities could be shown on the TfL website
- Car clubs
- Congestion charges and alternative forms of transport could be advertised to all driver segments

Arrival and Destination - Commercial summary

Commercial

Research findings

To London by plane:



by train:



by coach:



Most likely to go to ticketed activities in London:



Most likely to go to non-ticketed activities:



Coach users in the Capital:



Black cab/taxi users:



Hire car users:



Commercial opportunities

- Relationships with airlines, train companies and coach companies
- Connections with paid for visitor attractions and organised sight seeing tours
- Associations with restaurants, shops, parks and museums
- Connections with coach companies in London
- Associations with black cab/ taxis
- Car hire companies

Opportunity segments

Least opportunity

Most opportunity

Segment 4
House Guests

Segment 5
Focused Visitors

Segment 2
Socialites

Segment 1
Tourists

Segment 3
Explorers

Segment 6
London Enthusiast

- Highlight tickets in research sources
- Group/family travel
- Weekend travel ticket
- Eg public transport routes of tourist activities on TfL website
- Associations with accommodation, attractions, sightseeing tours, airport transfer companies and restaurant search websites
- Connections with airports and coach companies

- Highlight tickets in research sources
- Promote Oyster cards and transport mode options
- Eg public transport routes of tourist activities on TfL website
- Associations with accommodation, attractions, airport transfer companies and restaurant search sites
- Connections with train companies, coach companies, black cabs

- Advance tickets purchases
- Group/family travel
- Multiple day travel
- TfL website and in station wifi access
- Associations with accommodation, attractions, sightseeing tours, airport transfer companies and restaurant search websites
- Connections with car clubs, coach companies and black cabs

Thank you



APPENDIX - Pre-arrival / Planning



Planning of visit

The majority of visitors plan their visit at some point, however some are more likely to plan before they reach the Capital (Tourists, Focused Visitors and Explorers) whereas Socialites are happier to plan on the go. The keenness of London Enthusiasts is obvious here as they both pre-plan and plan on the go.

Region

NET Agree



Pre - planners

(I planned everything about my trip to London before leaving home)

54%

52%

66%

Plan as they go

(I decided what to do as I went along and did not plan much in advance)

29%

50%

46%

Question: C1: Still thinking of your (most recent) visit to London, how much do you agree with the following statements? Base: All

Segment

Less likely to plan trip in advance

More likely to plan in advance

Segment 3
Explorers

Segment 5
Focused Visitors

Segment 1
Tourists

Segment 6
London Enthusiast

49%

53%

64%

Active 6a

69%

Relaxed 6b

74%

79%

Less likely to plan on the go

More likely to plan on the go

Segment 2
Socialites

Segment 6
London Enthusiast

55%

Active 6a

60%

Relaxed 6b

72%

83%

Segment 4
House Guests

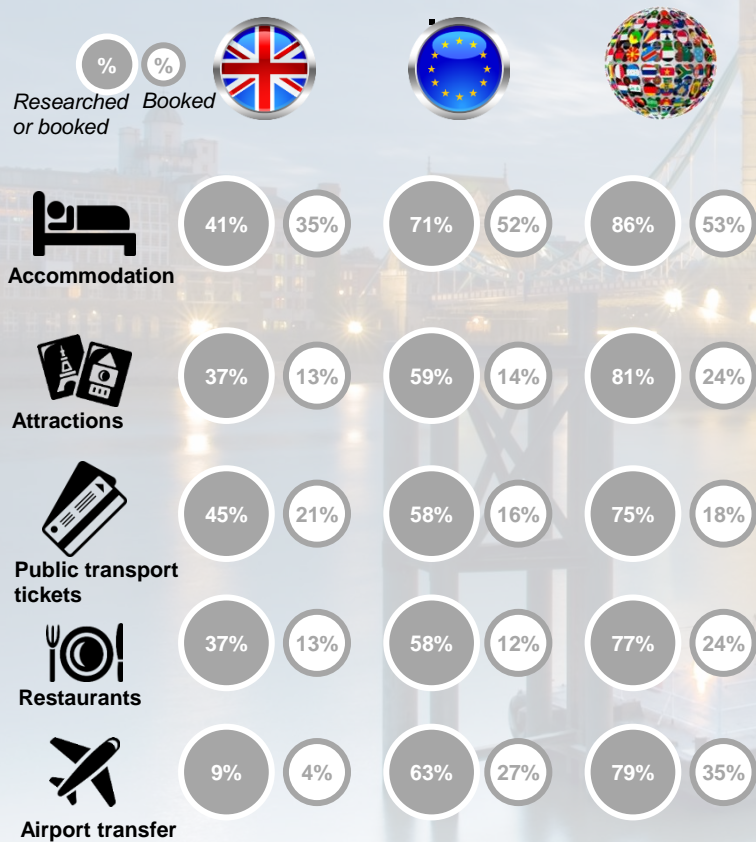
Non planners

(neither pre-plan nor on the go)

Pre-planners – aspects of trip planned

Those travelling to London from further afield are the most likely to plan and book all aspects of their trip in advance. While the below segments are the most likely to plan in advance, Explorers are unlikely to go ahead and book, particularly compared to London Enthusiasts.

Region



Question: B9: When planning for your last trip to London, which of the following did you research or book before leaving home? Base: All

Pre-planner segments

← Less likely to plan in advance

→ More likely to plan in advance

Segment 3
Explorers

Segment 5
Focused Visitors

Segment 1
Tourists

Segment 6
London Enthusiast

80%

65%

Segment 5 do not appear to be pre-planning or booking many aspects of their visit, most likely due to the fact that they are coming to London for a specific reason and for the day and that is where their planning is focused

82%

59%

84%

54%

81%

70%

13%

74%

20%

77%

25%

73%

60%

11%

44%

20%

64%

15%

75%

25%

International 5a

More likely to research/book accommodation and airport transfers

59%

11%

66%

16%

77%

24%

75%

55%

22%

68%

33%

69%

29%

63%

Active 6a

Relaxed 6b

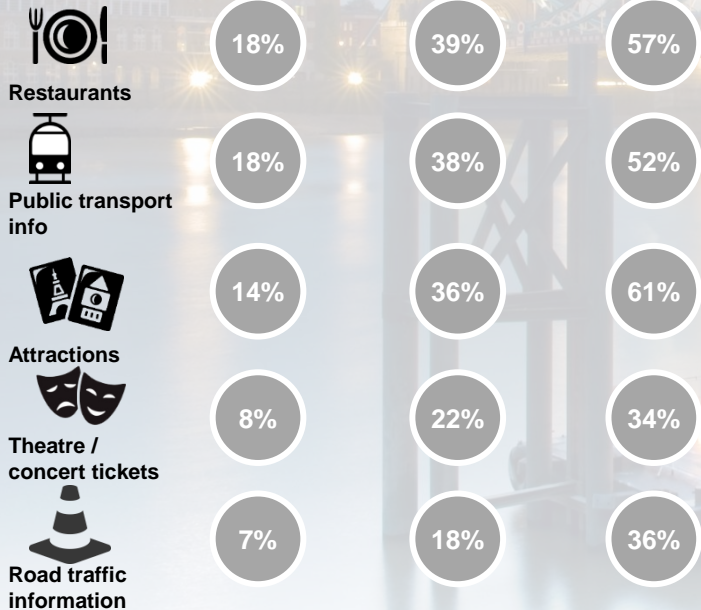
On the go planners – aspects of trip planned

When visitors did plan on the go, they were most likely to be looking at restaurants, attractions and public transport.

Region



Aspects of trip researched on the go



Question: B11: Did you use the internet to research any of the following while in London?
Base: All

Planners on the go segments

← Less likely to plan on the go

More likely to plan on the go →

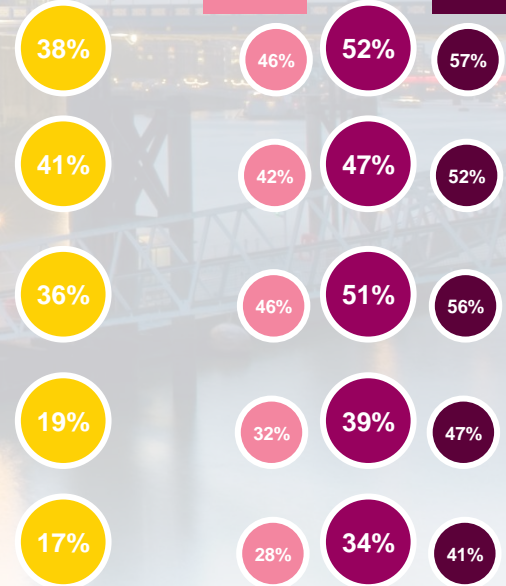
Segment 2
Socialites

Segment 6
London Enthusiast

Relaxed 6b

Active 6a

Socialites are no more likely than other segments to research any of these aspects of their trip while in London



57%

52%

56%

47%

41%

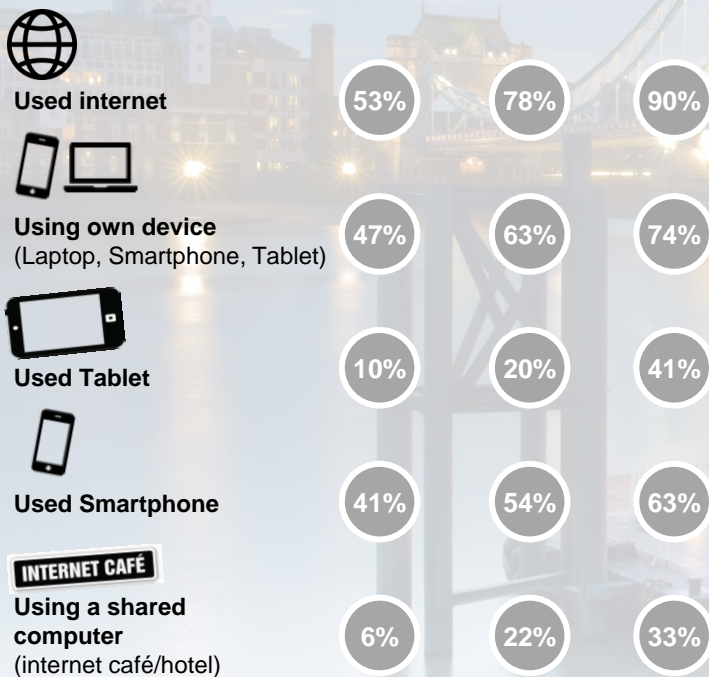
On the go planners – internet access

The majority of visitors used the internet to plan on the go when visiting London, particularly Socialites and London Enthusiasts. Mobile devices were a popular way to access the internet on the go, with London Enthusiasts the most likely to use a shared computer and the internet connection on their mobile.

Region



Sources used to plan on the go

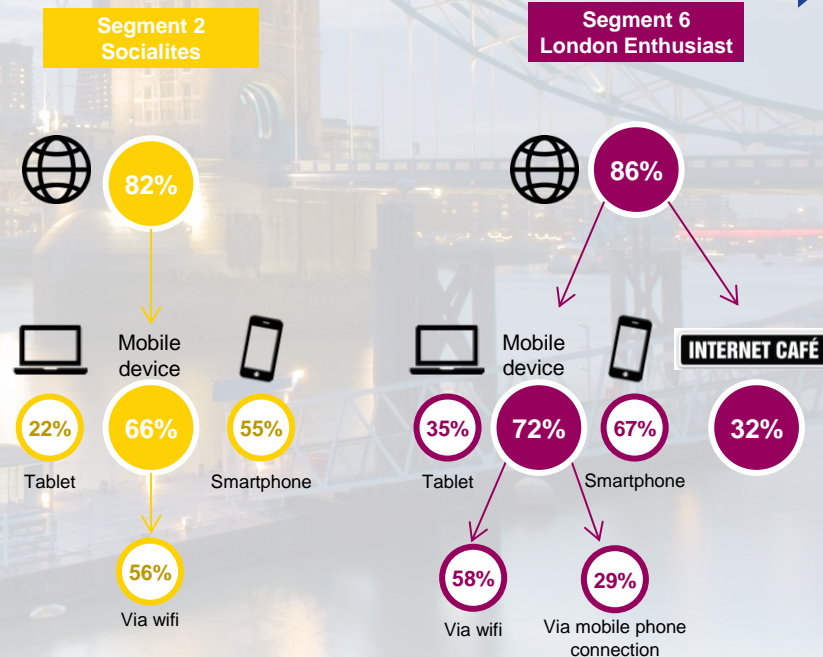


Question: B10: Did you use the internet while you were in London? / B14: Did you use your smartphone or tablet to access the internet or by using apps while in London? Base All

Planning on the go segments

← Less likely to plan on the go

More likely to plan on the go →



Active 6a

More likely to use mobile device (79% vs 70%)

Also most likely group to write about their experiences while travelling on social media (65%)

Planning travel around London

Familiarity with the transport network among Focused Visitors and London Enthusiasts means they don't need to plan their travel around London and are comfortable purchasing tickets before arriving without doing so. Likewise, Explorers and Tourists plan their travel but appear reluctant to purchase their tickets.

Region



Planned travel around London

28%

30%

54%



Purchased London public transport tickets before arriving

36%

19%

27%

Question B7: Which of the following best describes how you planned your travel around London either before you arrived or while you were in London? Base: All
Question B6: Did you buy any of these tickets before arriving in London? Base: All

Segments

← Less likely to plan travel

More likely to plan →

**Segment 5
Focused Visitors**

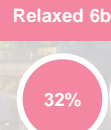
**Segment 6
London Enthusiast**

**Segment 3
Explorers**

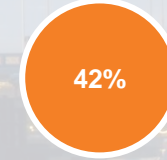
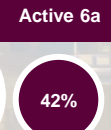
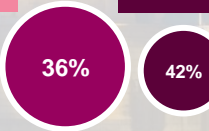
**Segment 1
Tourists**



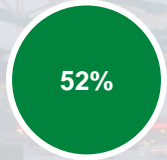
Most don't plan as already know what they are doing



Most already know what they are doing or worked things out as they went



Planned to make it simple/ efficient



A further 23% had their travel planned but by someone else

← Less likely to purchase tickets

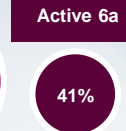
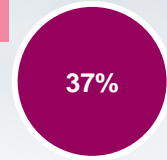
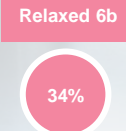
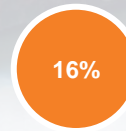
More likely to purchase →

**Segment 3
Explorers**

**Segment 1
Tourists**

**Segment 5
Focused Visitors**

**Segment 6
London Enthusiast**



Travel planners – sources used to plan

While online services are a popular source for planning travel around London, more traditional sources such as paper and other people continue to be used and are important. Explorers are more likely to speak to hotel staff and use maps while Tourists are more likely to ask an operator.

Planners of travel segments

Planned travel around London

Segment 1 Tourists

52%



88%

Paper (net)



63%

maps



59%

guidebooks



66%

Ask people (net)



31%

friends/family



31%

tour operator



57%

Online sources (net)



43%

TfL website

Segment 3 Explorers

42%



86%

Paper (net)



71%

maps



54%

guidebooks



62%

Online sources (net)



41%

TfL website



58%

Ask people (net)



34%

friends/family



30%

hotel staff

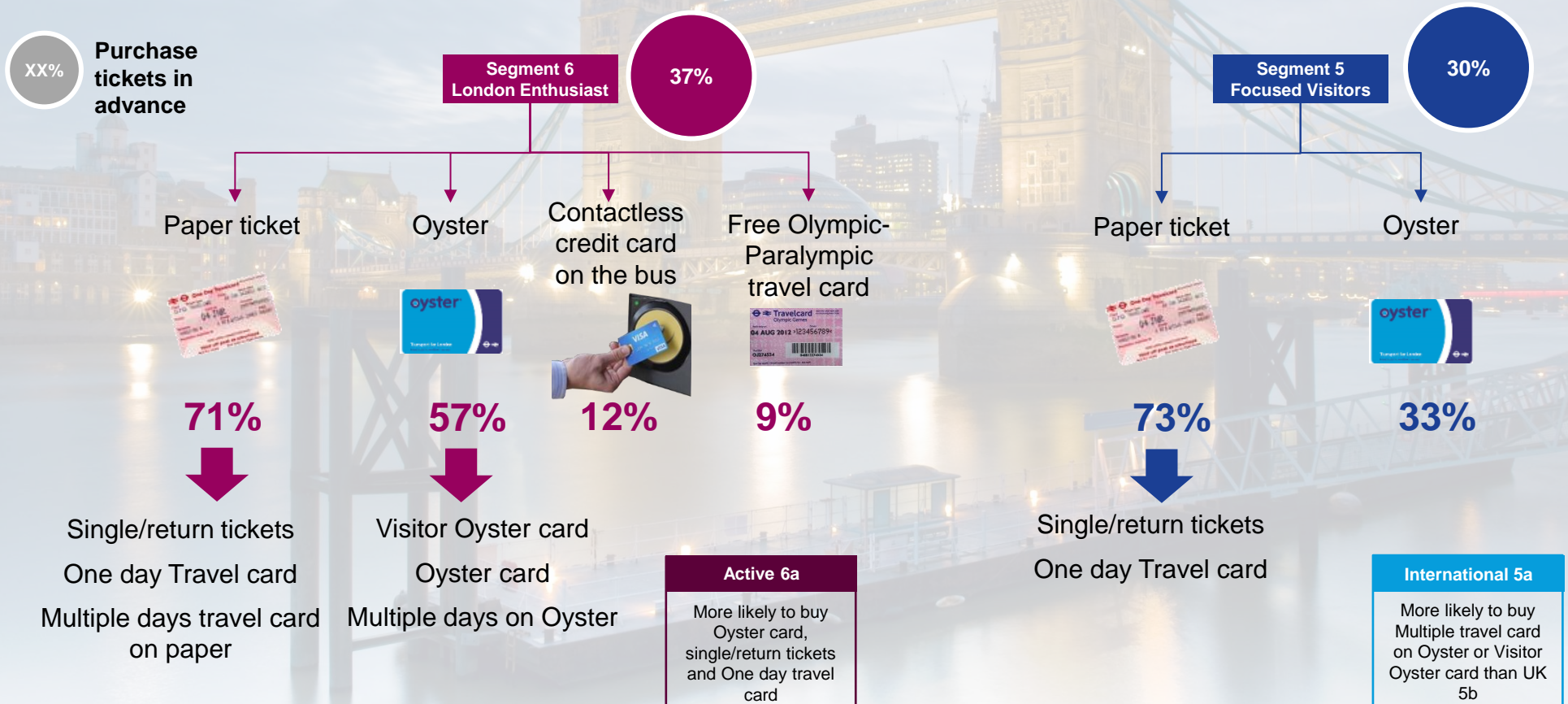
Question: B7: Which of the following best describes how you planned your travel around London either before you arrived or while you were in London? Base: All

Question: B8: Which of the following did you use to plan your travel around London? Base: All who planned journeys

Advance ticket purchasers

When booking transport tickets for the Capital London Enthusiasts are the most likely to purchase an Oyster card, however paper tickets are still the preferred option among visitors.

Advance ticket purchase segments



Question: B5: What types of tickets did you use when travelling on public transport on your most recent visit to London?

Base: All who used public transport on most recent visit to London

APPENDIX - Arrival



Opinions of London

Generally visitors are very positive about London, with the majority of long-haul visitors claiming it is the best sightseeing city in the world. The difference between House Guests and Explorers is evident here, House Guests are happy to come to London for the weekend, whereas Explorers look at it as a once in a life time opportunity and they want to do as much as they can in the time they are here.

Region

NET Agree



Travelling to London was a once in a lifetime trip

8% 45% 40%

London has the best sightseeing of any city in the world

37% 41% 58%



You can do London in a weekend

30% 40% 44%

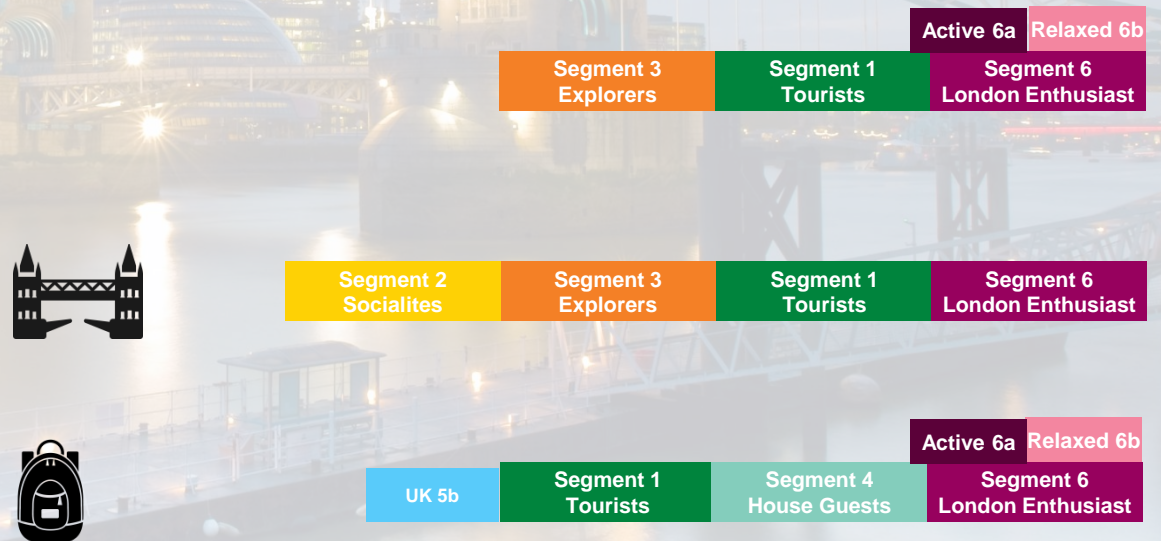


Question: C1: Still thinking of your (most recent) visit to London, how much do you agree with the following statements? Base: All

Segment

Less likely to agree

More likely to agree



Travelled with

Tourists are our most likely segment to travel with an organised tour and as such they tend to travel in larger groups. Focused Visitors, Socialites and House Guests are the most likely to travel to the Capital on their own.

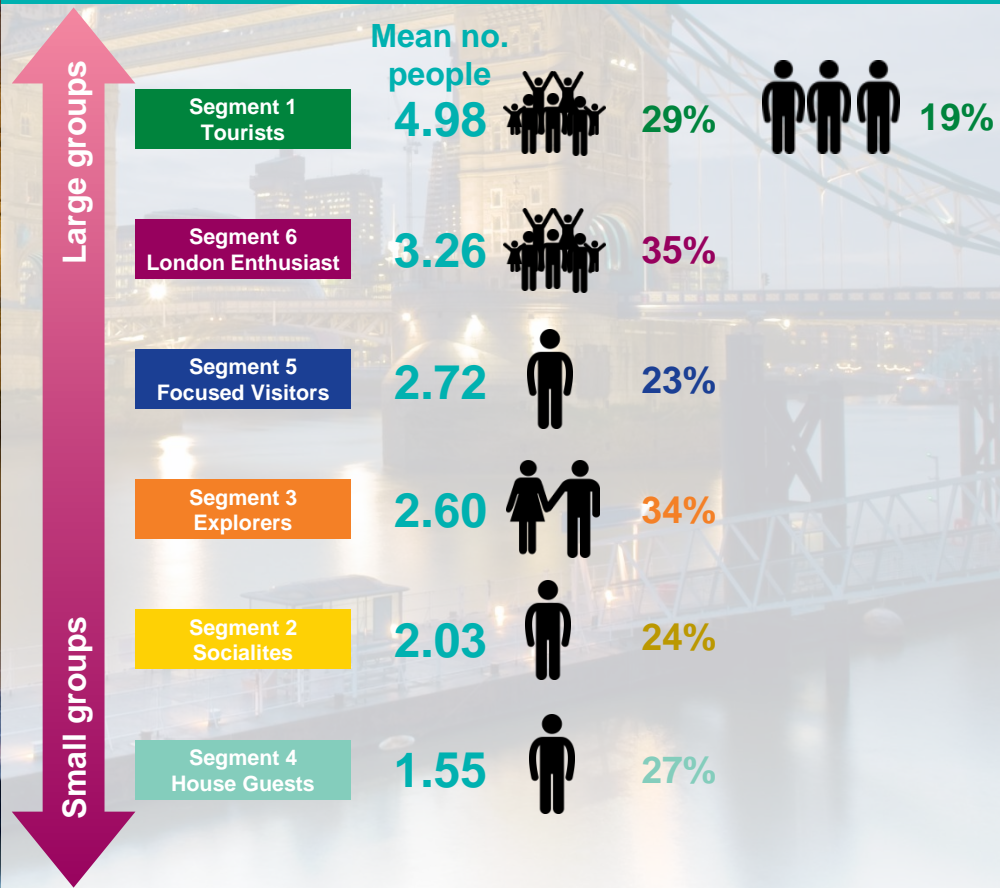
Region



Mean no. people **2.53** **3.10** **2.85**

Travelled as a couple		27%	26%	21%
Travelled with family and others		20%	23%	33%
Travelled alone		21%	13%	18%
Travelled with friends		14%	16%	13%
Travelled as family		15%	14%	8%
Travelled with colleague		3%	4%	5%
Other		1%	2%	1%

Segment



Question: A12: How many people did you travel to London with?
Base: All

Modes used to get to London

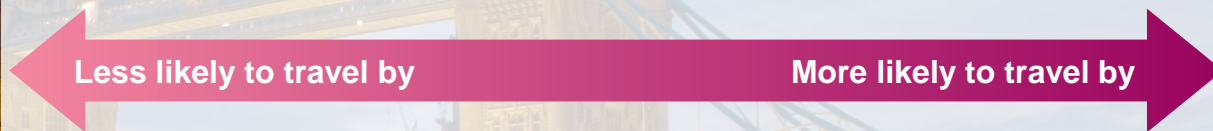
Those visiting London to stay with friends or family (House Guests) or with a specific objective (Focused Visitors) are the most likely to drive to London in their own car. Tourists and Socialites tend to travel by plane to get to London. Hire care is the least likely means of transport used among visitors to the Capital.

Region



	UK	EU	International
Plane	5%	67%	70%
Train	63%	24%	29%
Own vehicle	28%	11%	9%
Coach	13%	13%	17%
Hired vehicle	3%	10%	25%

Segment



Segment 2 Socialites
Segment 1 Tourists



Active 6a International 5a UK 5b
Segment 3 Explorers
Segment 6 London Enthusiast
Segment 5 Focused Visitors



Active 6a International 5a UK 5b
Segment 4 House Guests
Segment 6 London Enthusiast
Segment 5 Focused Visitors



Segment 1 Tourists
Segment 3 Explorers
Segment 6 London Enthusiast



Active 6a Relaxed 6b
(56% researched or booked a hire vehicle in advance)
Segment 6 London Enthusiast

International 5a
More likely than 5b to travel by hire car or plane

Question: A9: What modes of transport did you use to get to London? Base: All

Main reason for visiting London


Most visitors are coming to London for leisure purposes, however Focused Visitors and House Guests are the most likely to be here for business, House Guests are obviously killing two birds with one stone and staying with friends and family at the same time.

Region



	UK	EU	World
Holiday / leisure	61%	68%	71%
Visiting friends / family	23%	18%	11%
Business	11%	11%	14%
Personal business	5%	1%	3%

Segment

Think London has the best sightseeing of any city in the world 



Question: A8: What was the main purpose of your visit to London?
Base: All

Staying in London

Those who have travelled long haul to visit London, are more likely to spend their money on a 4/5 star hotel, for reassurance or because they can afford to. London Enthusiasts and Socialists tend to stay for longer periods of time, while Socialites stay with Friends and Family, London Enthusiasts opt for hotels or B&Bs.

Region



Mean no. of nights



1.91

5.91

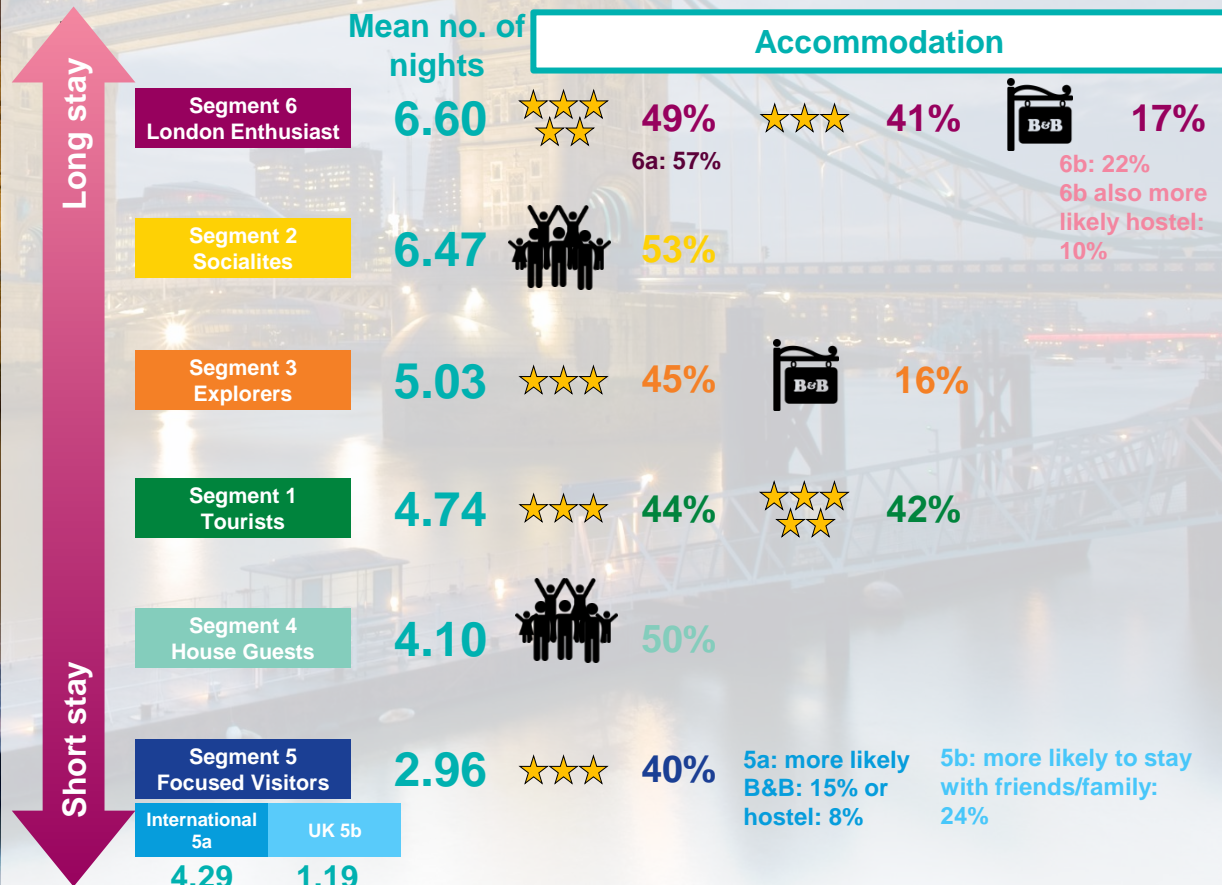
7.34

Accommodation

Hotel (up to 3*)	★★★★	38%	38%	36%
Hotel (4* or 5*)	★★★★★	30%	29%	55%
Friends/Family	👥	29%	22%	14%
B&B	🏠	8%	15%	15%
Hostel/campus	🛏️	3%	7%	6%
Serviced Accommodation	🏡	2%	5%	8%

Question: A5: How many nights did you stay in London? Base: All
A11: Where did you stay overnight? Base: All who stayed at least one night

Segment



Visiting other parts of the UK

London Enthusiasts are the most likely to make day trips or overnight trips outside of London. Explorers are also likely to make day trips outside of London. House guests are the least likely to make trips elsewhere

Region



I made day trips outside London

26%

31%

I stayed at least one night outside London

24%

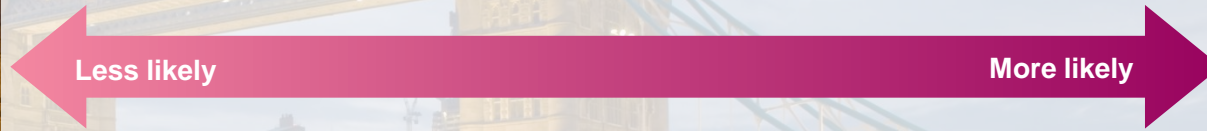
44%

I only visited London

49%

24%

Segment



Segment 3
Explorers

Segment 6
London Enthusiast

Segment 5
Focused Visitors

Segment 6
London Enthusiast

Segment 1
Tourists

Segment 2
Socialites

Segment 3
Explorers

Segment 5
Focused Visitors

Segment 4
House Guests

Question: A6. Did you visit anywhere else in the UK on this visit?

Base: All

Please note: this question was asked of Europe and rest of world respondents only

APPENDIX - At destination activities



Spend in London

There are ways to save money in London, for example those who tend to stay with friends (Socialites and House Guests) spend less. London Enthusiasts tend to stay for longer and travel in bigger groups, hence they spend the most when visiting London.

Region



Average spend per day

£98

£137

£342



Average spend per trip

£217

£608

£1, 816

Segment



Average spend per day



Average spend per trip

Segment 6
London Enthusiast

£246

£1,222

6a: £1,379
6b: £1,062

Segment 1
Tourists

£207

£998

Segment 3
Explorers

£167

£778

Segment 2
Socialites

£126

£556

Segment 4
House Guests

£127

£467

Segment 5
Focused Visitors

£107

£294

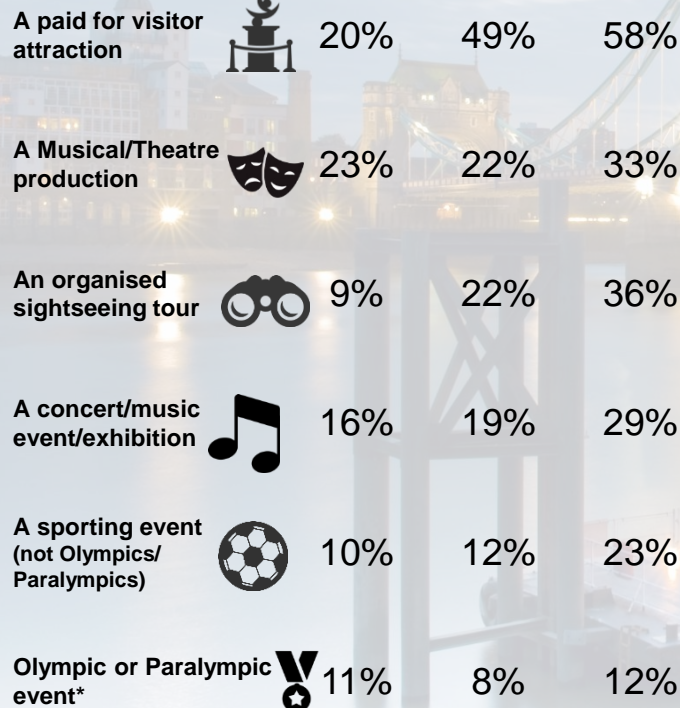
5a: £390
5b: £171

Question: A14: How much do you think you spent while in London? Please give a figure for your own spending excluding any accommodation or transport costs to get to London. Base: All

Doing ticketed activities in London

As most people are visiting London for holiday/leisure, paid for visitor attractions are fairly popular. As Tourists plan most of their travel before hand and are the most likely to travel with an organised tour they are visiting paid for attractions and going on organised tours of the city. Socialites are more interested in more entertainment activities such as exhibitions, concerts and music events.

Region

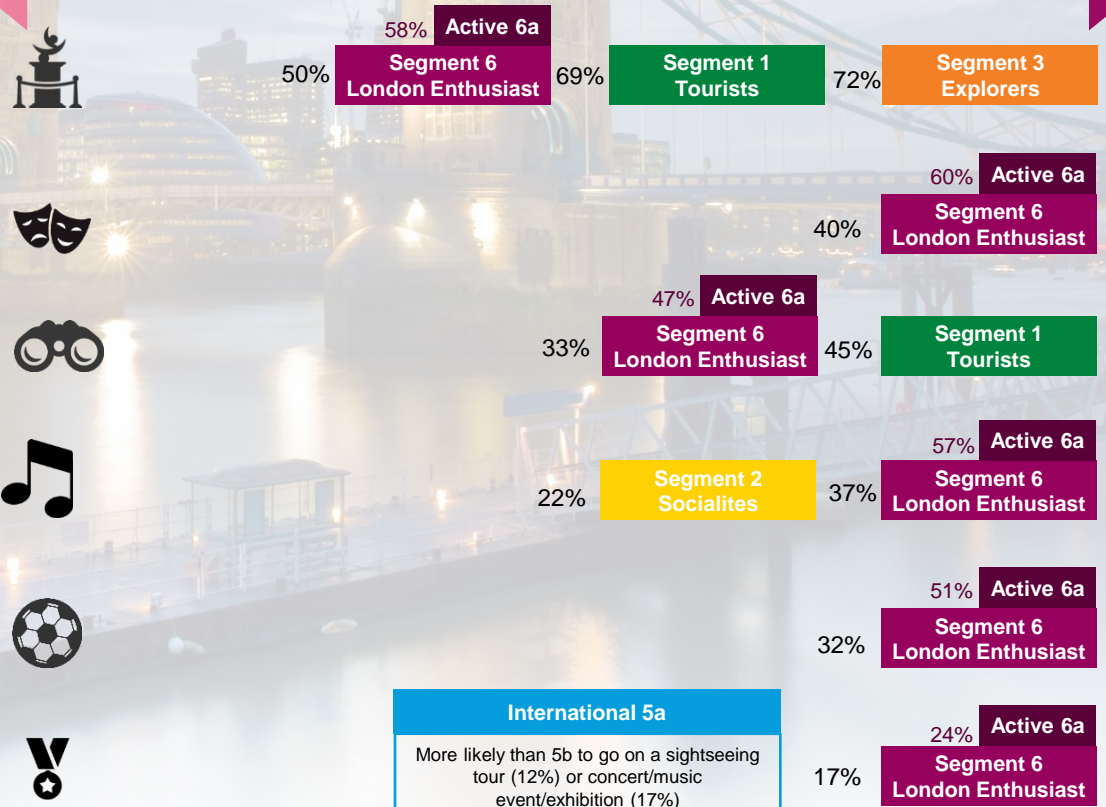


Question: A13: Which of the following activities did you do while in London?
Base: All

Segment

← Less likely to

→ Most likely to

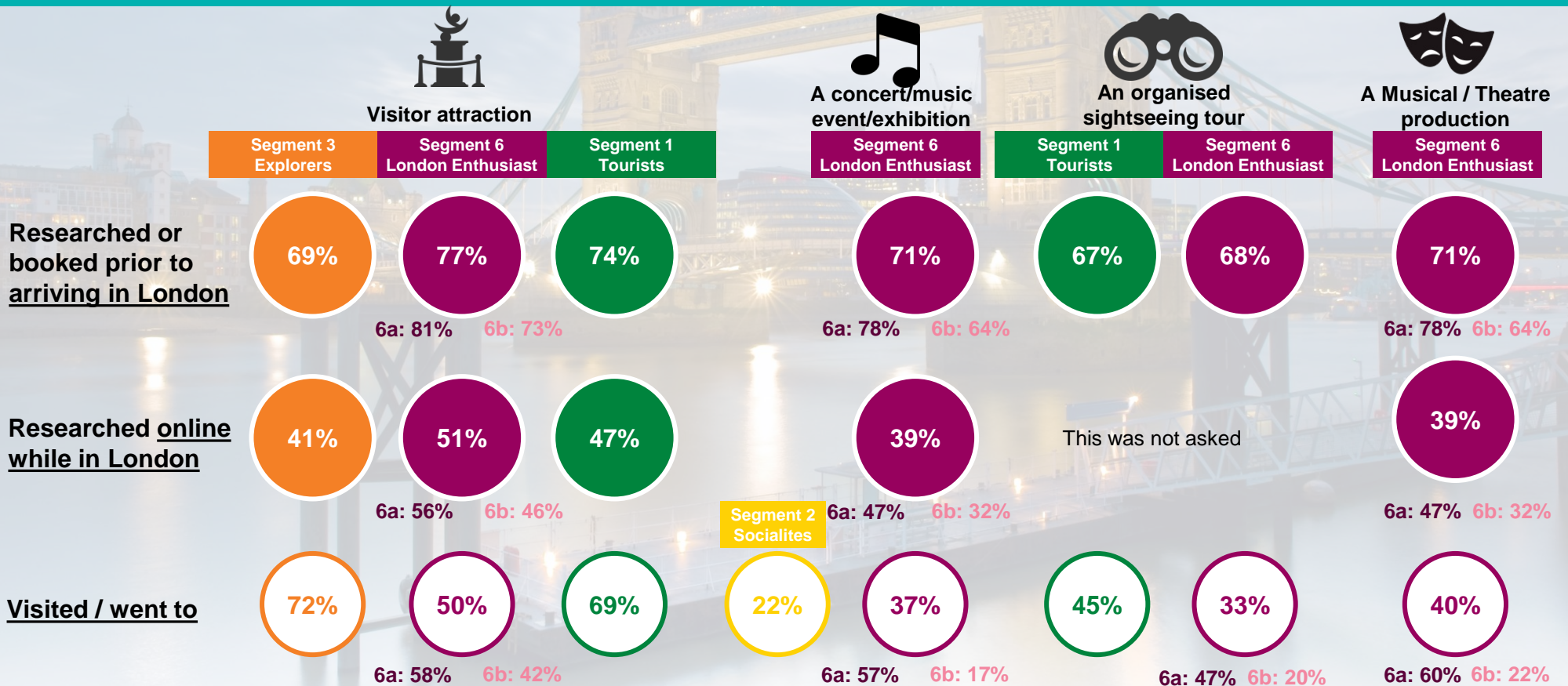


International 5a
More likely than 5b to go on a sightseeing tour (12%) or concert/music event/exhibition (17%)

Ticketed activities researched / visited

As with most things on their trip to London, Tourists and London Enthusiasts are the most likely to research and book their activities in advance and are also the most likely to use the internet to research these activities while in the Capital. While Socialites are likely to attend concert/music events/exhibitions this is neither researched in advance nor on the go.

Segments who visited below activities



Question: A13: Which of the following activities did you do while in London?/ B9: When planning for your last trip to London, which of the following did you research or book before leaving?/ B11: Did you use the internet to research any of the following while in London?/ Base: All

Doing non-ticketed activities in London

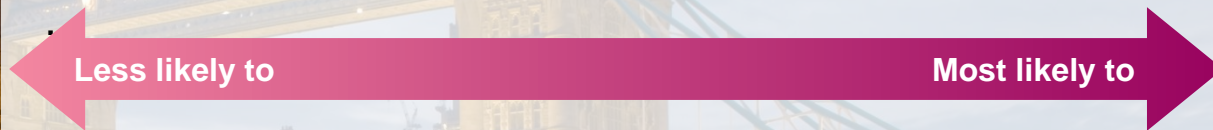
While people are away from home they are naturally more likely to dine out and shopping appears to be more of an attraction to those that do not live in the UK due to the variety it offers from home. Meanwhile, Explorers, Socialites and Tourists are very keen on a variety of activities in London.

Region



Activity	UK (%)	EU (%)	International (%)
A restaurant	56%	76%	76%
One of the main shopping areas	35%	65%	61%
A park	27%	62%	61%
A museum	26%	56%	60%
A bar or club in the evening	27%	56%	56%
A street market	18%	48%	53%
Friends/family	30%	34%	33%
An art gallery	14%	33%	50%
London Transport Museum	5%	17%	29%

Segment



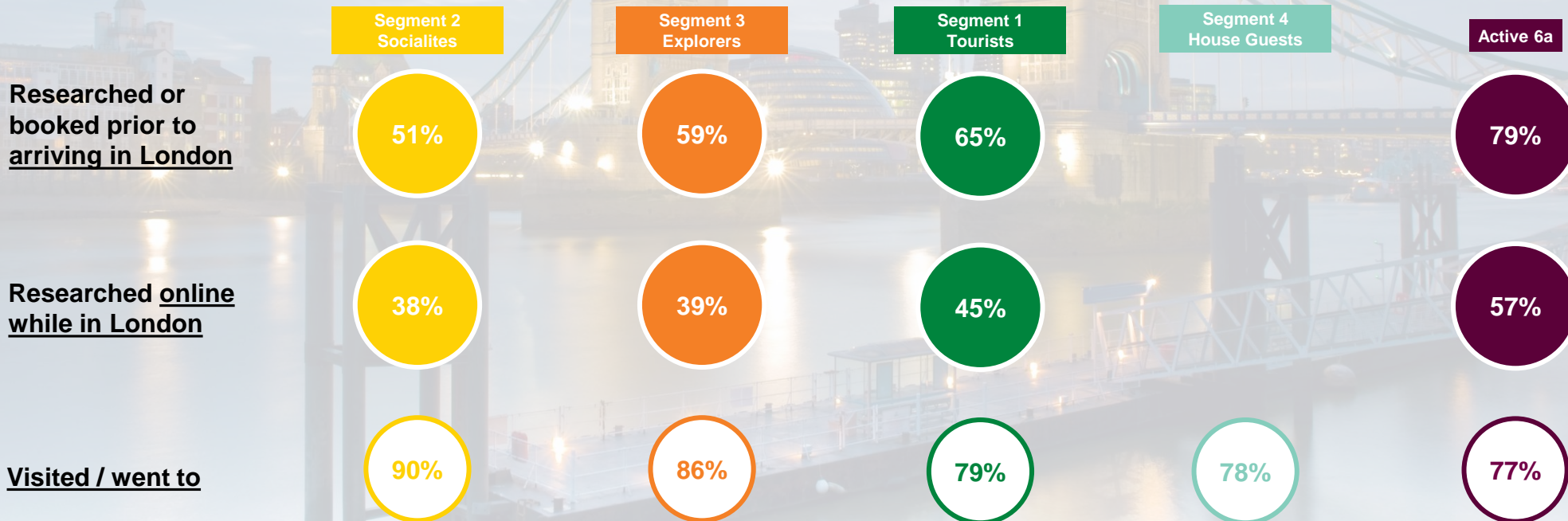
Question: A13: Which of the following activities did you do while in London?
Base: All

Most popular non ticketed activity visited

While House Guests eat out they are less likely to research and book restaurants in advance as they are staying with friends and family who know where to go. Tourists continue to be the most organised.

Segments who went to a restaurant

Restaurants



Question: A13: Which of the following activities did you do while in London?/ B9: When planning for your last trip to London, which of the following did you research or book before leaving ?/ B11: Did you use the internet to research any of the following while in London?/ Base: All











APPENDIX - At destination transport



Use of public transport

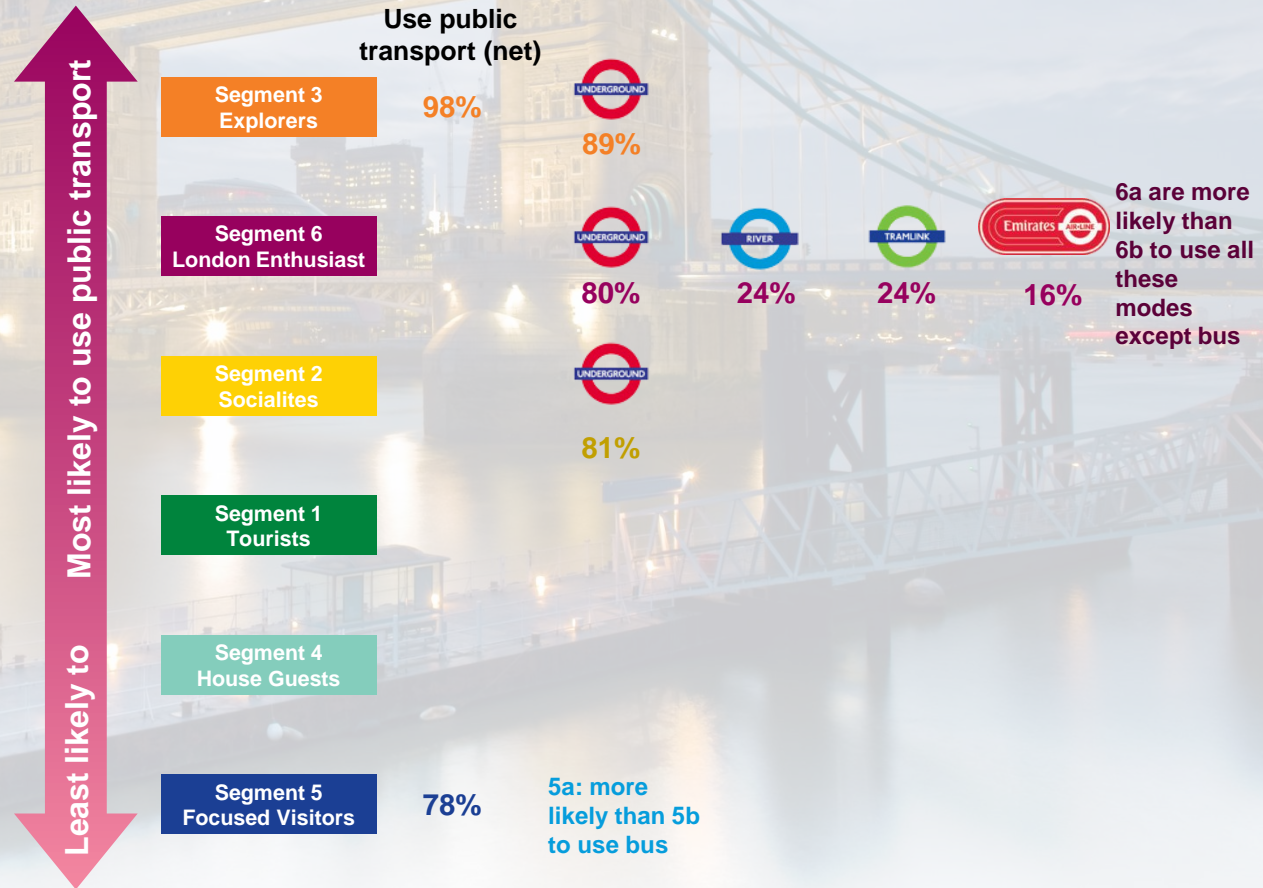
The Tube is the most popular mode of transport when visiting London, however those modes that can also provide a tourist perspective such as the Emirates Airline and the River Boat are most popular among long haul visitors. Note: private transport modes shown on slide 48

Region

			
Public transport:	83%	93%	93%
Tube / Underground 	74%	79%	75%
Bus 	30%	70%	70%
Train 	29%	31%	40%
River boat 	7%	17%	26%
DLR 	7%	14%	16%
Tram 	3%	14%	26%
Emirates Air Line 	2%	7%	15%

Question: B1: Which of the following types of transport did you use while in London? Base: All

Segment



Tickets used

Paper tickets continue to be more popular than Oyster cards among visitors to London and Visitor Oyster cards are more popular among international visitors than UK visitors to the Capital. London Enthusiasts are the most likely to use contactless credit card on bus. London Enthusiasts are the most likely to use contactless credit card on bus.

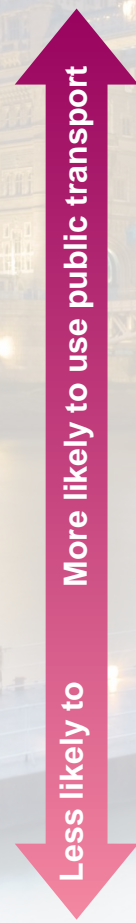
Region



	UK	EU	International
Public transport users:	83%	93%	93%
Net: Paper ticket	74%	72%	69%
Single/return ticket	41%	43%	45%
One day travel card	46%	35%	34%
Multiple days travel card on paper	2%	15%	16%
Net: Oyster	33%	39%	61%
Oyster card	27%	20%	24%
Visitor Oyster card	6%	17%	35%
Multiple days on Oyster	3%	12%	19%
Contactless credit card on bus	1%	5%	12%
Free Olympic/Paralympic card	4%	4%	6%

Question: B5: What types of tickets did you use when travelling on public transport on your most recent visit to London?
 Base: All who used public transport on most recent visit to London

Segment






Segment 3 Explorers	One day travel card Visitor Oyster card
Segment 6 London Enthusiast	Visitor Oyster card Oyster card Multiple days on Oyster Multiple days travel card on paper Contactless credit card on bus Free Olympic / Paralympic card
Segment 2 Socialites	Oyster card
Segment 1 Tourists	Single / return ticket Visitor Oyster card Multiple days travel card on paper
Segment 4 House Guests	Oyster card
Segment 5 Focused Visitors	<p>Do not over index on any type of ticket</p>

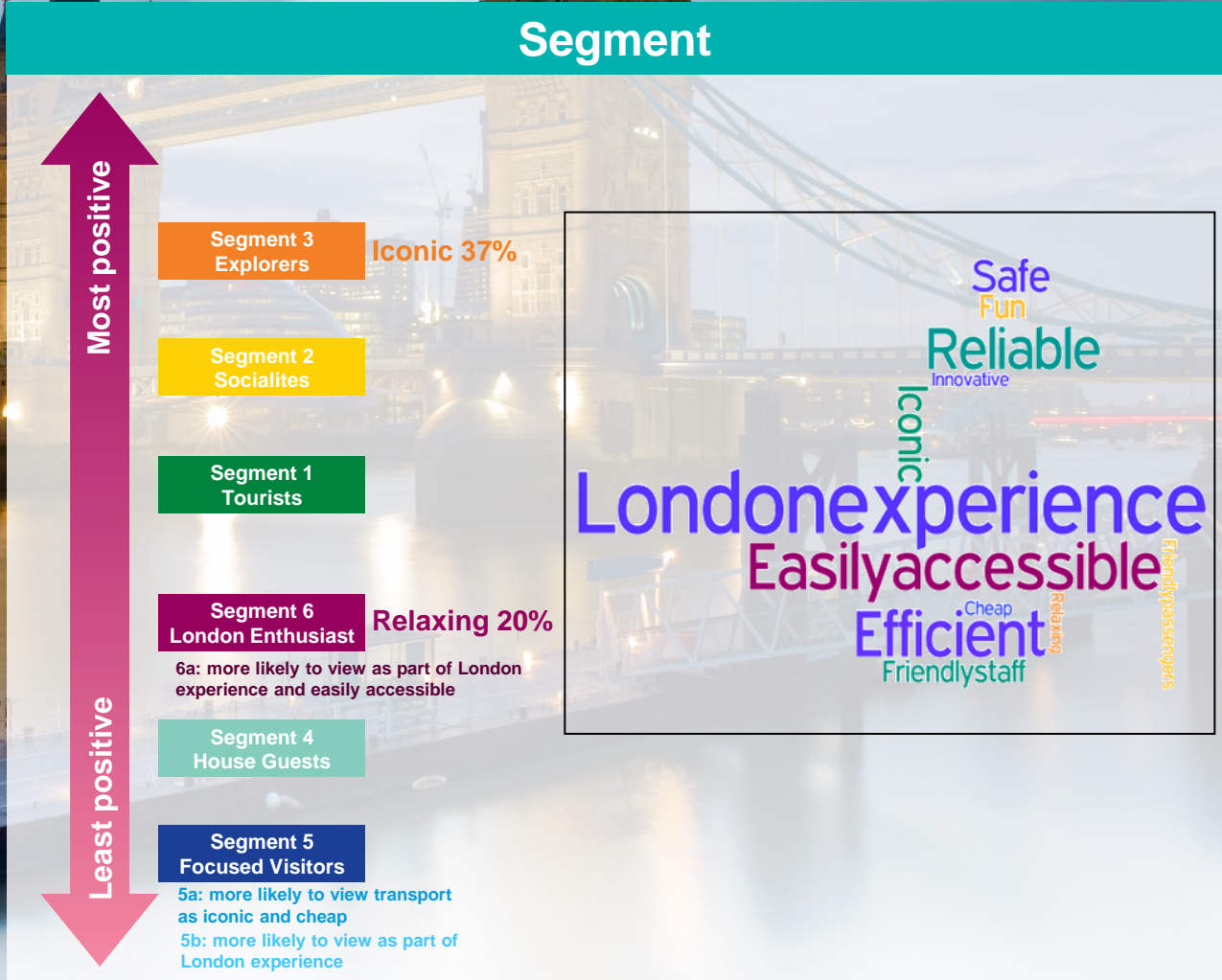
Active 6a	International 5a
More likely to buy Oyster card, single/return tickets and One day travel card	More likely to buy Multiple travel card on Oyster or Visitor Oyster card than UK 5b

Positive perceptions of public transport

Thoughts on London transport were fairly positive, it was thought to be part of the London experience, accessible to all and efficient. Explorers thought it to be an iconic part of London while London Enthusiasts found it relaxing.

	Region		
			
Net: Positive	90%	95%	97%
Part of London experience	64%	51%	47%
Easily accessible for everyone	44%	40%	39%
Efficient	37%	39%	48%
Reliable	32%	34%	45%
Safe	21%	29%	38%
Iconic	27%	29%	22%
Fun	13%	23%	30%
Friendly staff	13%	20%	25%
Cheap	9%	12%	16%
Innovative	7%	12%	21%
Friendly passengers	3%	13%	19%
Relaxing	4%	10%	22%

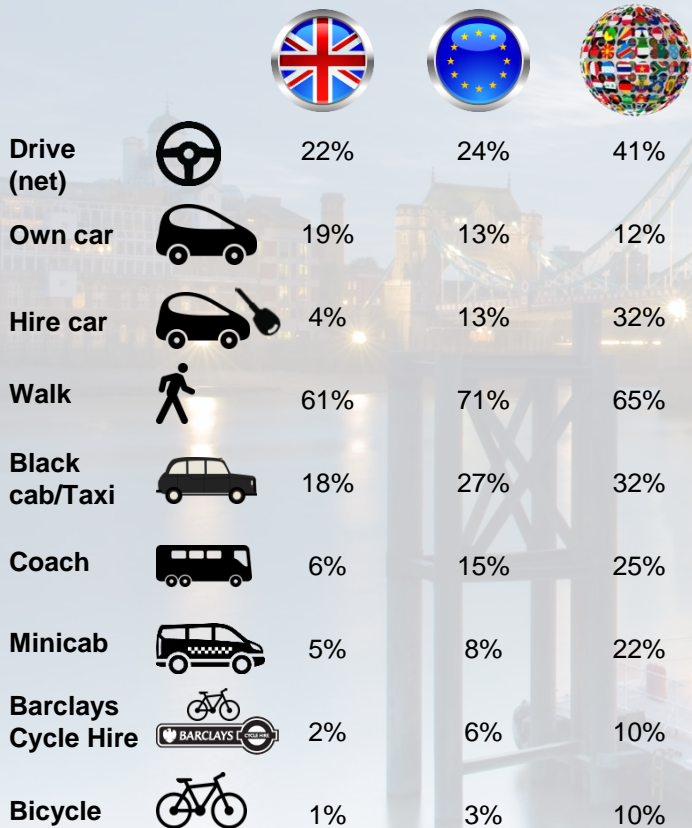
Question: B4: London has a range of public transport options. Which of the following words or phrases do you associate with public transport in London?
Base: All



Use of other transport modes

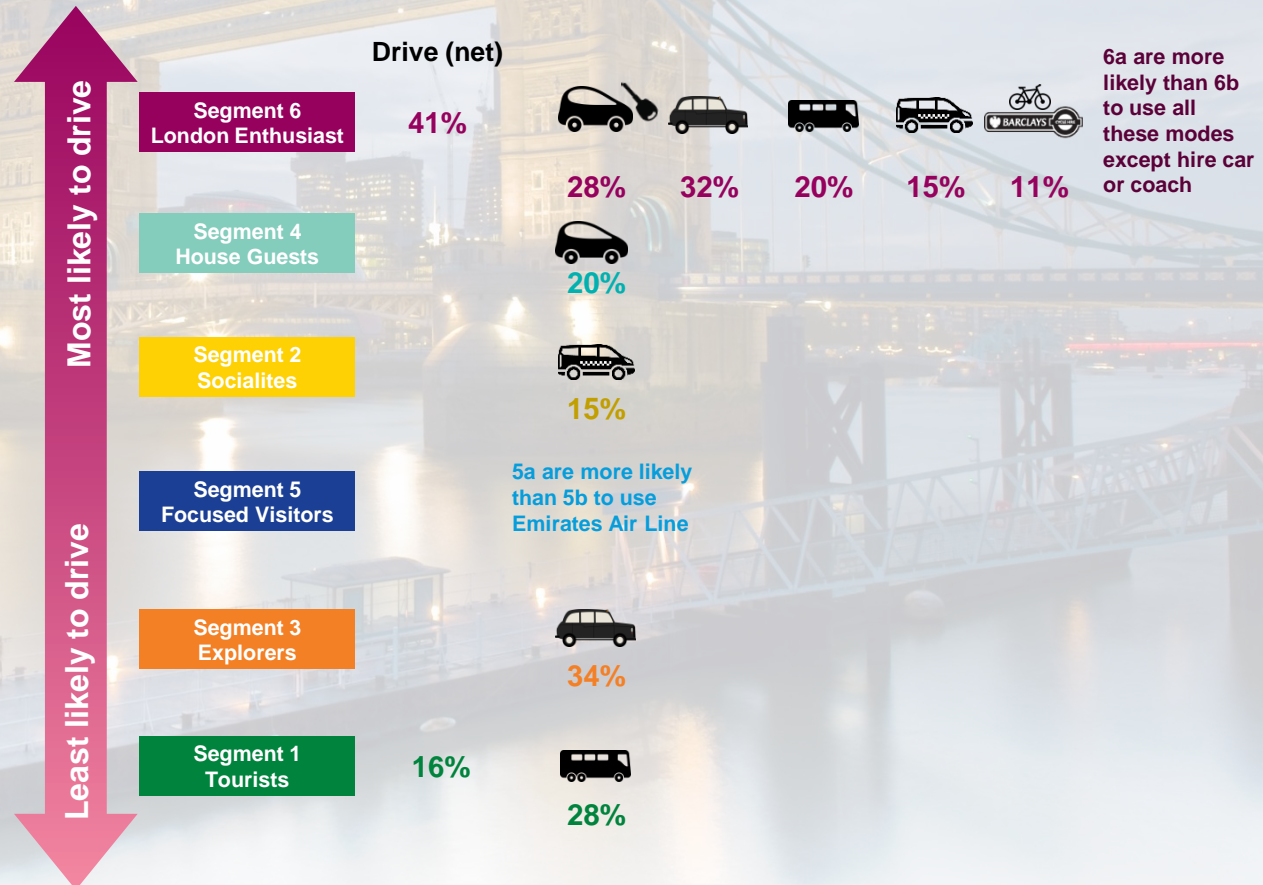
International visitors are walking more than those from the rest of the UK. Explorers and London Enthusiasts are the most likely to travel by Black cab while Tourists who are more likely to be with an organised tour are most likely to use coaches.

Region



Question: B1: Which of the following types of transport did you use while in London? Base: All

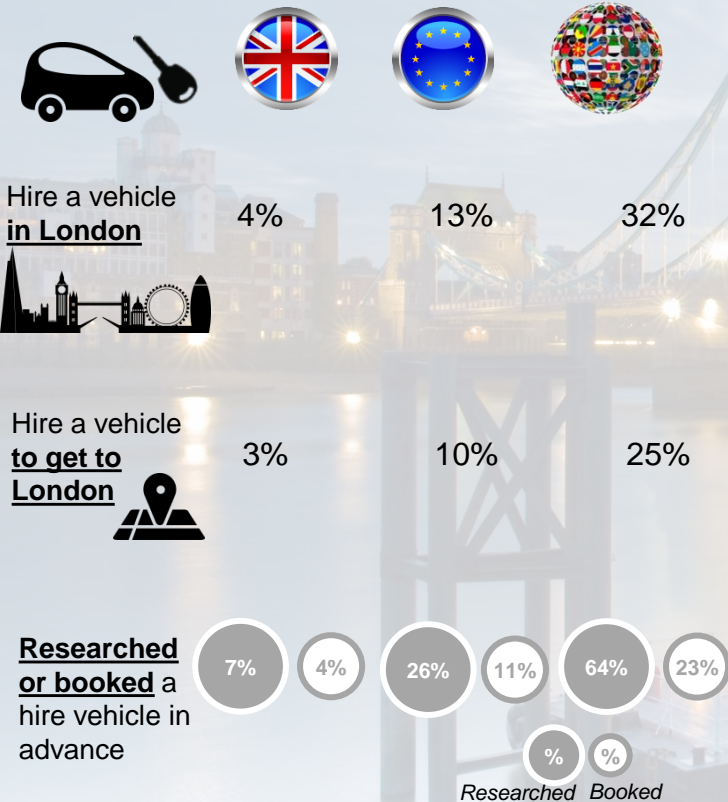
Segment



Vehicle hire

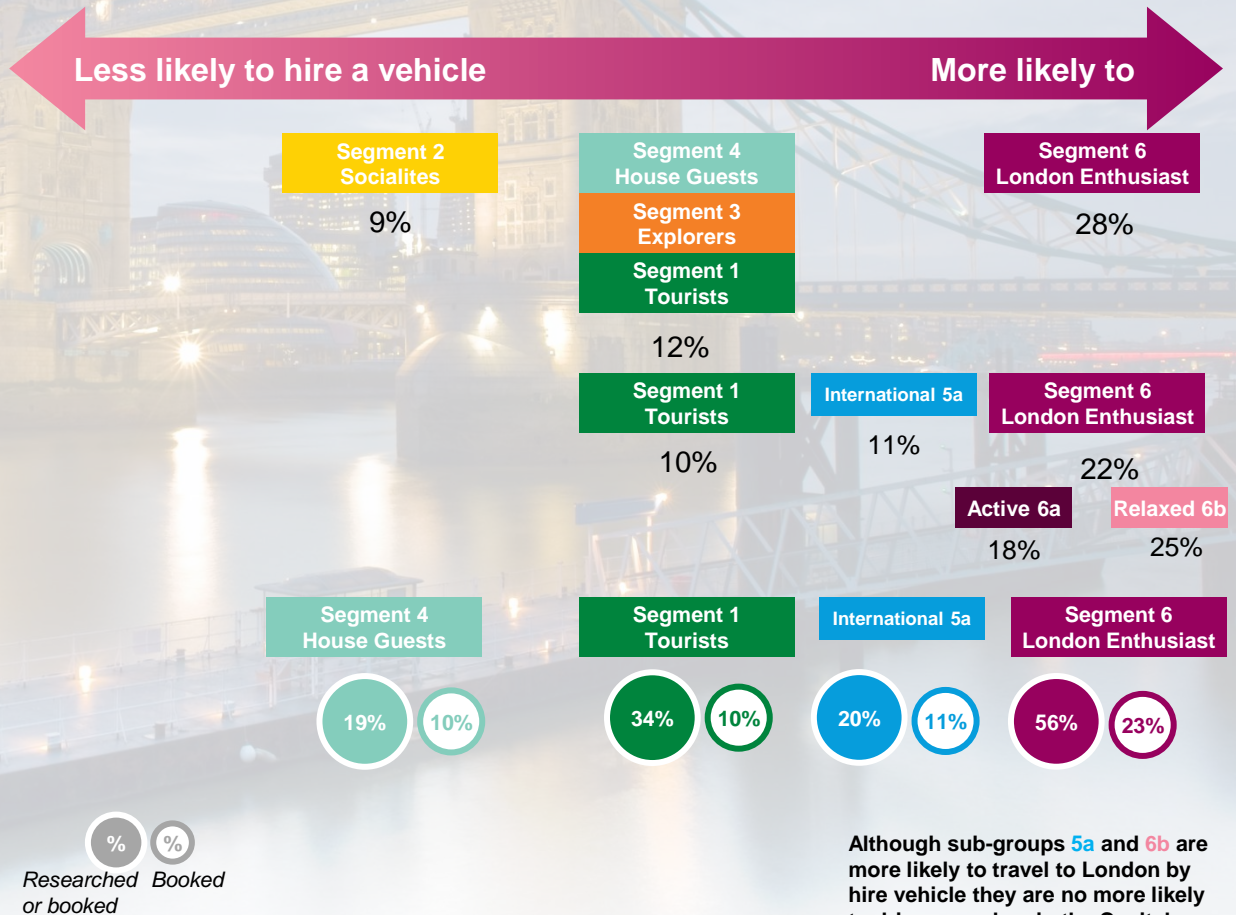
Visitors are more likely to hire a car to travel around London, rather than hire a car to travel to the Capital, this tends to be researched but not necessarily booked in advanced.

Region



Question: B1: Which of the following types of transport did you use while in London? Base: All / Question: A9: What modes of transport did you use to get to London? Base: All / Question: B9: Which of the following did you research or book before leaving home? Base: All

Segment



Although sub-groups 5a and 6b are more likely to travel to London by hire vehicle they are no more likely to drive one when in the Capital

Positive perceptions of driving

International visitors were also positive about driving in London, more so than those visiting from the rest of the UK. Those travelling from further afield thought it was fun and safe considerably more than the rest.

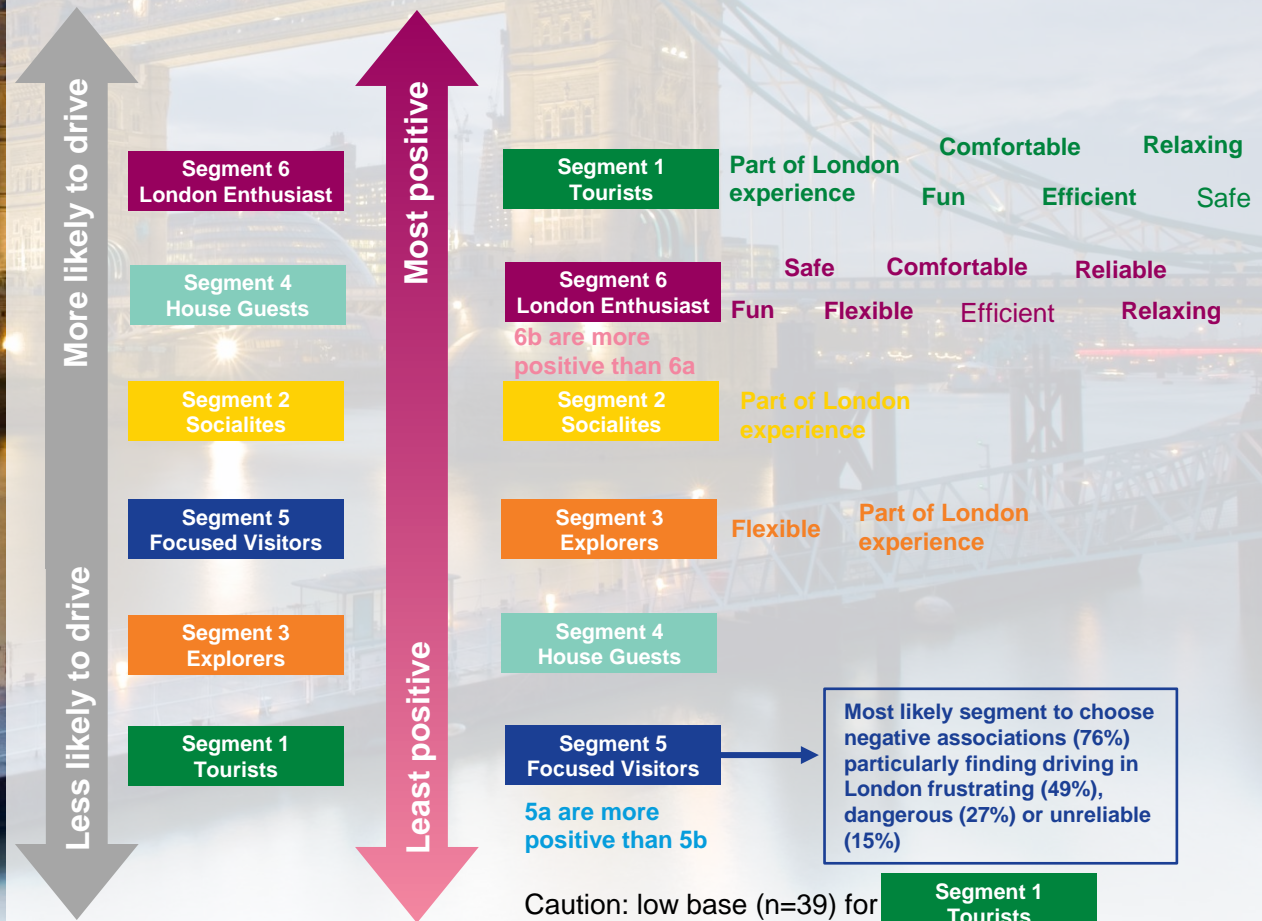
Region



	UK	EU	Rest of World
Net: positive	55%	85%	93%
Part of London experience	30%	45%	39%
Fun	15%	28%	45%
Flexible	13%	18%	25%
Cheaper than alternatives	13%	10%	12%
Comfortable	13%	27%	37%
Safe	12%	23%	43%
Reliable	11%	22%	34%
Efficient	10%	23%	28%
Relaxing	5%	17%	31%

Question: B3: Which of the following words or phrases do you associate with driving around London?
 Base: All that drive a car while in London

Segment



APPENDIX - Demographics

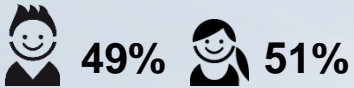


Demographics of UK, short haul, long haul visitors

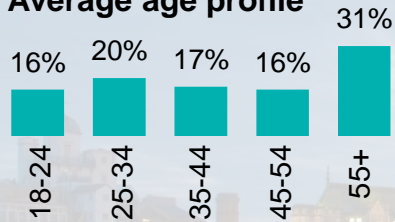
UK



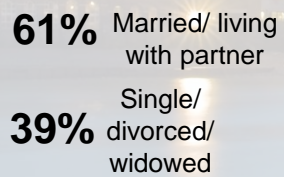
Gender



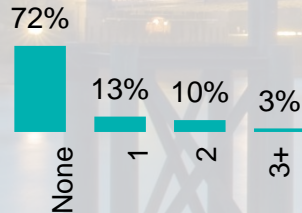
Average age profile



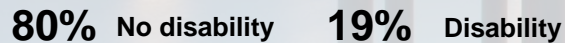
Marital status



Number of children



Disability



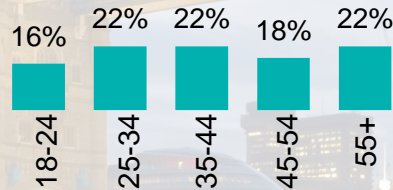
Short haul



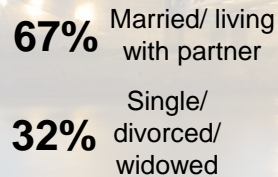
Gender



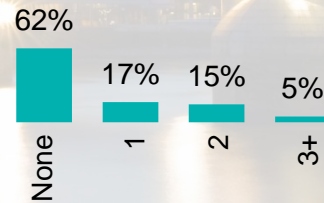
Average age profile



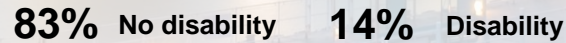
Marital status



Number of children



Disability



France, Germany, Spain and Italy – 18% each



Ireland, Netherlands and Poland – 9% each

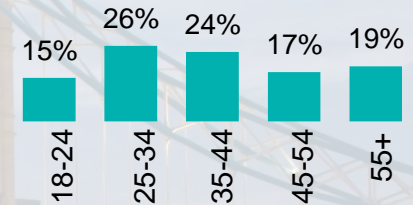
Long haul



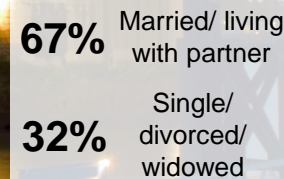
Gender



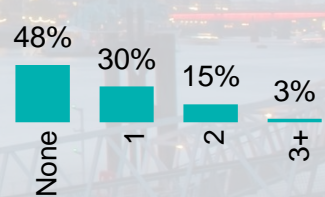
Average age profile



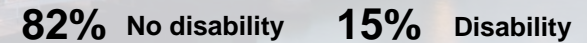
Marital status



Number of children



Disability



USA 40%



Australia, China and Brazil – 20% each

Segment 1- Tourists

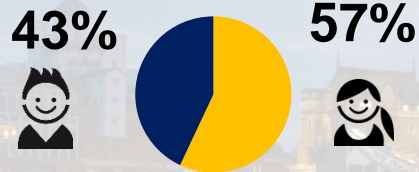
Segment 1 – Tourists

Tourists include visitors from a mix of countries and of a range of ages. They are more likely to be married / living with partner but with no children

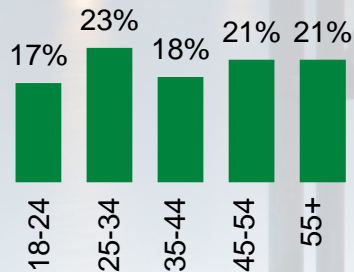
Visiting London

Demographics

Gender

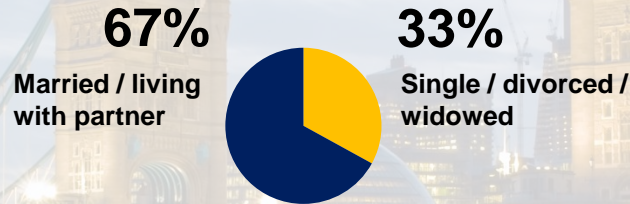


Average age profile

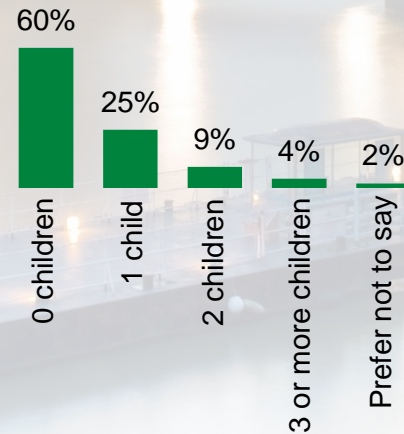


Marital status / children

Marital status

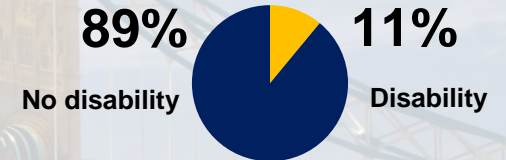


Number of children



Disability

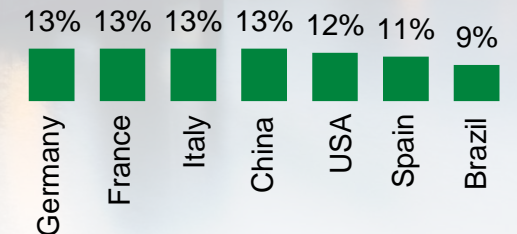
Disability



- Visual impairment – 3%
- Hearing impairment – 2%
- Asthma – 2%

Country

Country visiting from



Country visiting from shown if 8% or above

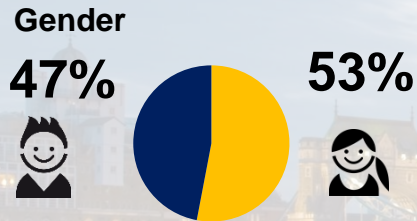
Segment 2 - Socialites

Segment 2 – Socialites

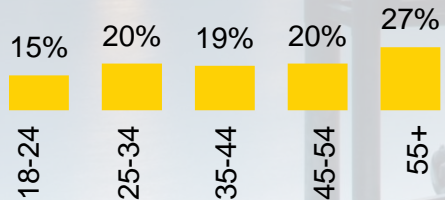
Socialites are more likely to be visiting from within the UK or Europe. They don't have any children but range in age

Visiting London

Demographics

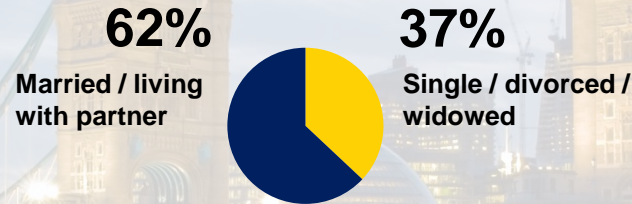


Average age profile



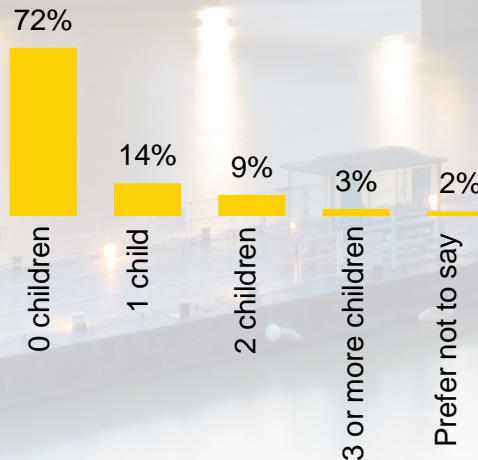
Marital status / children

Marital status



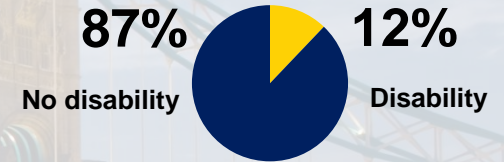
- Prefer not to say – 1%

Number of children



Disability

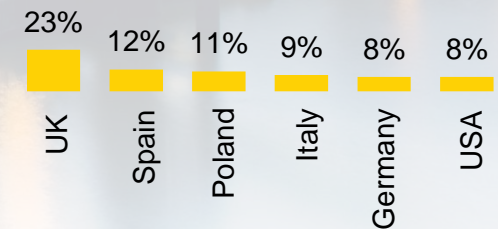
Disability



- Asthma, hearing impairment – 3% each
- Arthritis, mobility impairment, visual impairment – 2% each
- Prefer not to say – 1%

Country

Country visiting from



Country visiting from shown if 8% or above

Segment 3 - Explorers

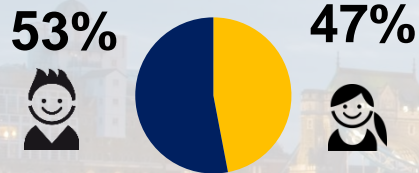
Segment 3 – Explorers

Explorers are more likely to be from within the UK or Europe. The majority do not have any children

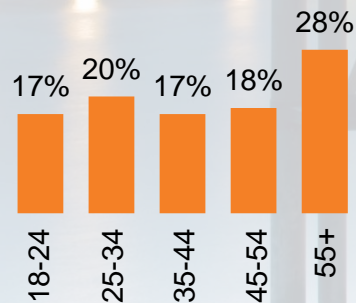
Visiting London

Demographics

Gender

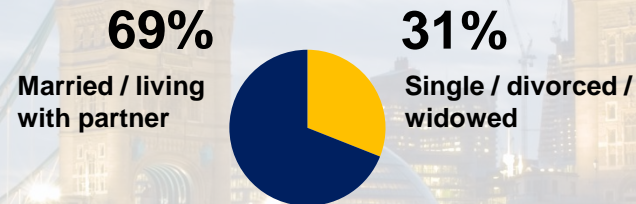


Average age profile

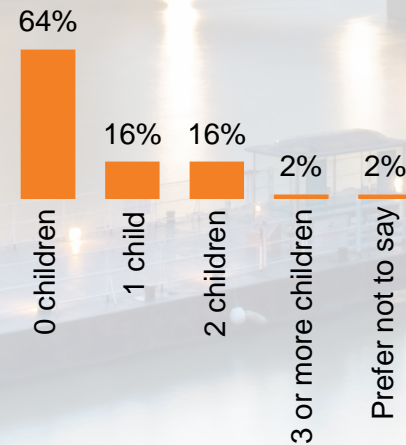


Marital status / children

Marital status

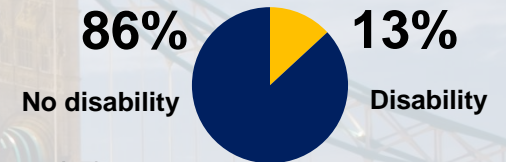


Number of children



Disability

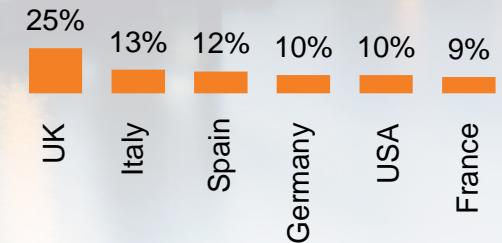
Disability



- Asthma – 4%
- Mobility impairment, arthritis – 3% each
- Serious long term illness, visual impairment – 2% each
- Prefer not to say

Country

Country visiting from



Country visiting from shown if 8% or above

Segment 4 – House Guests

Segment 4 – House Guests

House Guests are again likely to be visiting from the UK or Europe, range in age and most do not have children

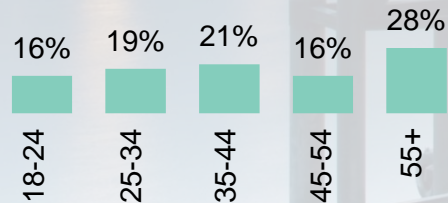
Visiting London

Demographics

Gender

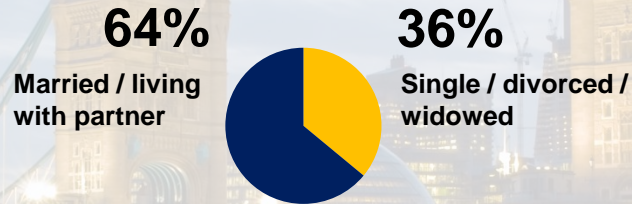


Average age profile

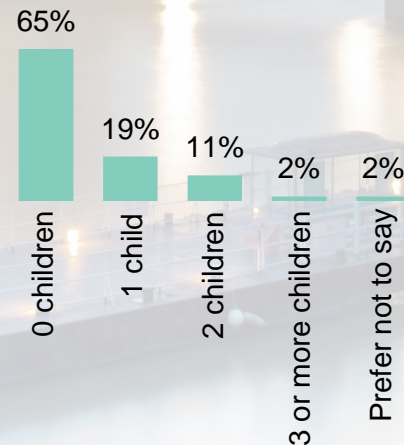


Marital status / children

Marital status

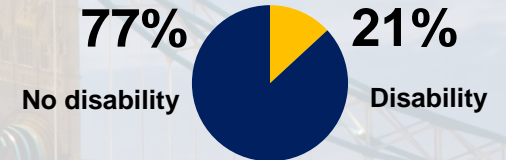


Number of children



Disability

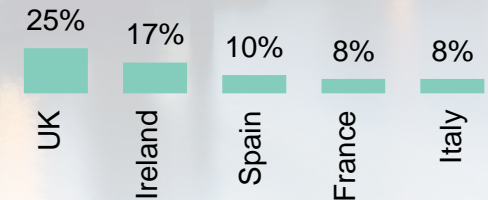
Disability



- Mobility impairment – 6%
- Asthma – 5%
- Arthritis, serious long term illness – 4% each
- Prefer not to say – 2%

Country

Country visiting from



Country visiting from shown if 8% or above

Segment 5 – Focused Visitors

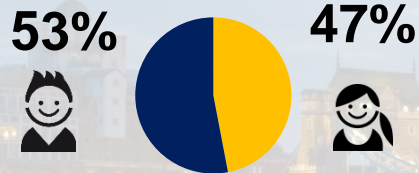
Segment 5 – Focused Visitors

The vast majority of Focused Visitors are visiting from within the UK. They tend not to have any children under 18 and range in age

Visiting London

Demographics

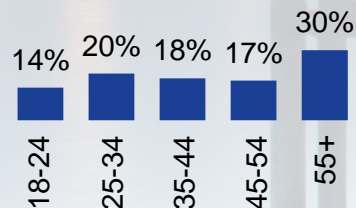
Gender



International 5a
Male – 61%
Female – 39%

UK 5b
Male – 43%
Female – 57%

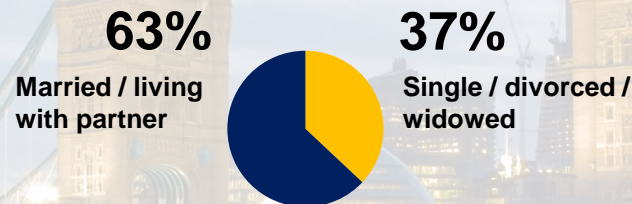
Average age profile



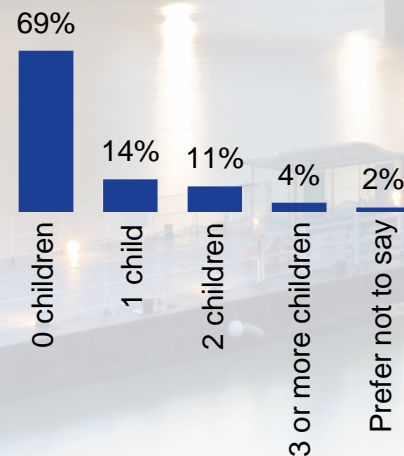
• Prefer not to say – 1%

Marital status / children

Marital status

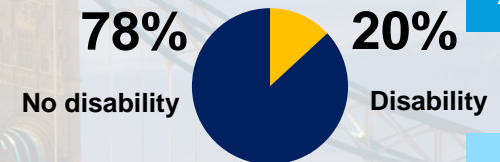


Number of children



Disability

Disability



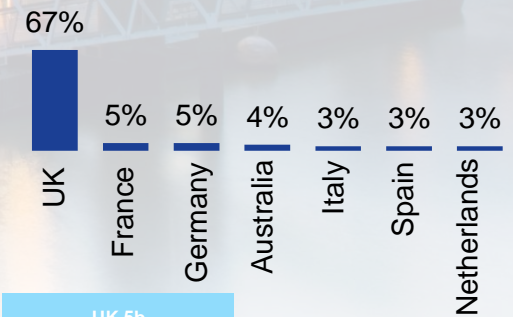
International 5a
23% have a disability

UK 5b
15% have a disability

- Arthritis – 6%
- Mobility impairment – 5%
- Serious long term illness, asthma, visual impairment, hearing impairment - 3% each
- Prefer not to say – 2%

Country

Country visiting from



UK 5b
All respondents from UK

Segment 6 – London Enthusiasts

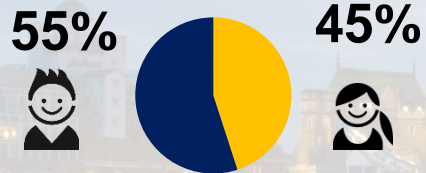
Segment 6 – London Enthusiasts

London Enthusiasts tend to travel from a range of countries. They are more likely than other segments to have at least one child and tend to be aged between 25-44

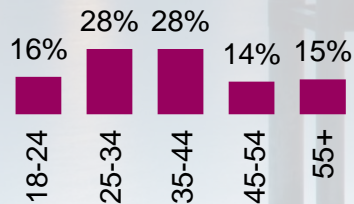
Visiting London

Demographics

Gender

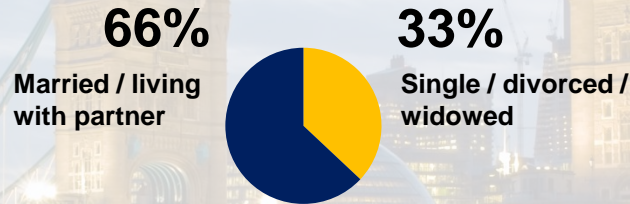


Average age profile



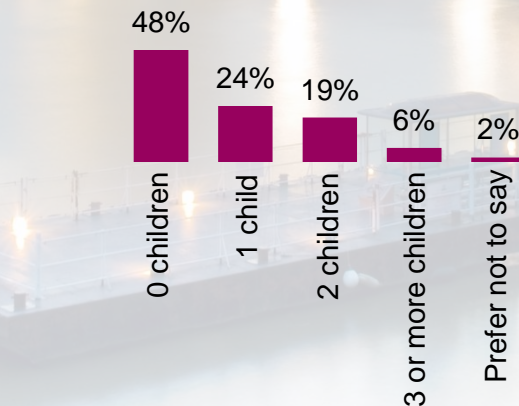
Marital status / children

Marital status



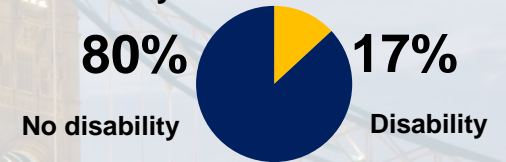
- Prefer not to say – 1%

Number of children



Disability

Disability



- Arthritis, asthma – 4% each
- Hearing impairment, visual impairment, age related mobility difficulties, mental health condition – 3% each
- Prefer not to say – 3%

Country

Country visiting from

Active 6a

UK – 41%
China – 13%
USA – 8%
Germany – 8%
Spain – 8%

Relaxed 6b

France – 20%
USA – 20%
Italy – 12%
Germany – 11%
Spain – 11%

Country visiting from shown if 8% or above