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.
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.
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.
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.
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%.
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%).
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.
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.*
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)

Where are you visiting in London on this visit?
Overseas visitors (non-business trips)

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.
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.
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
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.
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*
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%).
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.
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.
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

### Influences on decision to visit London Overseas visitors

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Sample: All overseas (1830)

**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

### Influences on decision to visit London

#### UK staying visitors

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Sample: All UK staying (661)

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

Influences on decision to take London day trip
UK day visitors

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Sample: All UK day (858)

**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

Influences on decision to take London day trip

London residents

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Sample: All London residents (1238)

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).
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.
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.*
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

How would you rate London overall as a place to visit?

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%).
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).
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.
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.
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 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

Is there anything London could do to make this visit more enjoyable for you? (Unprompted – main mentions)

<table>
<thead>
<tr>
<th>Suggestion</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Expensive - cost of things in general</td>
<td>8%</td>
</tr>
<tr>
<td>Public transport expensive</td>
<td>7%</td>
</tr>
<tr>
<td>Rubbish, litter, dirt, smog</td>
<td>6%</td>
</tr>
<tr>
<td>Traffic, congestion</td>
<td>4%</td>
</tr>
<tr>
<td>Improve public transport</td>
<td>3%</td>
</tr>
<tr>
<td>Food/drink expensive</td>
<td>3%</td>
</tr>
<tr>
<td>Crime/safety concerns</td>
<td>3%</td>
</tr>
</tbody>
</table>

Sample: All respondents (4587)

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

<table>
<thead>
<tr>
<th>Rating</th>
<th>All</th>
<th>Overseas</th>
<th>UK staying</th>
<th>UK day</th>
<th>London residents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Excellent</td>
<td>24%</td>
<td>24%</td>
<td>24%</td>
<td>26%</td>
<td>22%</td>
</tr>
<tr>
<td>Good</td>
<td>27%</td>
<td>27%</td>
<td>24%</td>
<td>27%</td>
<td>29%</td>
</tr>
<tr>
<td>Fair</td>
<td>5%</td>
<td>4%</td>
<td>5%</td>
<td>5%</td>
<td>7%</td>
</tr>
<tr>
<td>Poor</td>
<td>1%</td>
<td>2%</td>
<td>1%</td>
<td>2%</td>
<td>2%</td>
</tr>
</tbody>
</table>

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

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

- **Definitely**
  - All: 81%
  - Overseas: 68%
  - UK staying: 73%
  - UK day: 57%

- **Probably**
  - All: 30%
  - Overseas: 23%
  - UK staying: 17%
  - UK day: 12%

- **Fairly likely**
  - All: 9%
  - Overseas: 10%
  - UK staying: 9%
  - UK day: 6%

- **Probably won’t**
  - All: 3%
  - Overseas: 7%
  - UK staying: 1%
  - UK day: 1%

- **Definitely won’t**
  - All: 0%
  - Overseas: 0%
  - UK staying: 0%
  - UK day: 0%

Sample: All except London residents (3349), Overseas (1830), UK staying (661), UK day (858)

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.
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

<table>
<thead>
<tr>
<th>Place of residence</th>
<th>Arrival point in UK - Overseas</th>
</tr>
</thead>
<tbody>
<tr>
<td>London residents 27%</td>
<td>Heathrow</td>
</tr>
<tr>
<td>Overseas 40%</td>
<td>Gatwick 15%</td>
</tr>
<tr>
<td>UK day 19%</td>
<td>Stansted 17%</td>
</tr>
<tr>
<td>UK staying 14%</td>
<td>Luton 6%</td>
</tr>
<tr>
<td></td>
<td>Other UK airport 2%</td>
</tr>
<tr>
<td></td>
<td>Eurostar - St Pancras or AslEbb 6%</td>
</tr>
<tr>
<td></td>
<td>Eurotunnel - Folkstone 1%</td>
</tr>
<tr>
<td></td>
<td>Ferry - Dover 2%</td>
</tr>
<tr>
<td></td>
<td>Ferry - other port 1%</td>
</tr>
</tbody>
</table>

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%).
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.
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.
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

Which London borough do you live in?
London residents

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.
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%).
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** (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

1. Overall Performance

<table>
<thead>
<tr>
<th>Mean</th>
<th>Top2-Box</th>
<th>Bottom2-Box</th>
</tr>
</thead>
<tbody>
<tr>
<td>3.9</td>
<td>72%</td>
<td>3%</td>
</tr>
</tbody>
</table>

2. Recommendation

<table>
<thead>
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<th>Mean</th>
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<th>Bottom2-Box</th>
</tr>
</thead>
<tbody>
<tr>
<td>4.6</td>
<td>92%</td>
<td>2%</td>
</tr>
</tbody>
</table>

3. Repurchase

<table>
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<tr>
<th>Mean</th>
<th>Top2-Box</th>
<th>Bottom2-Box</th>
</tr>
</thead>
<tbody>
<tr>
<td>4.6</td>
<td>92%</td>
<td>2%</td>
</tr>
</tbody>
</table>

4. Competitive Advantage

<table>
<thead>
<tr>
<th>Mean</th>
<th>Top2-Box</th>
<th>Bottom2-Box</th>
</tr>
</thead>
<tbody>
<tr>
<td>3.8</td>
<td>66%</td>
<td>7%</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Base</th>
<th>Overall</th>
<th>High Customer Retention</th>
<th>Low Customer Retention</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overseas</td>
<td>1830</td>
<td></td>
<td></td>
</tr>
<tr>
<td>UK staying</td>
<td>661</td>
<td></td>
<td></td>
</tr>
<tr>
<td>UK day</td>
<td>858</td>
<td></td>
<td></td>
</tr>
<tr>
<td>London resident</td>
<td>1238</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
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%.