Visitor Segmentation Presentation

July 2013
TfL number: 12271
SPA number: 1513
Putting the data into perspective

Visits to London

15.5m Overseas Visits
SPA-FT data: 1637

87.2m Domestic Visits
(Day trips: 75m, Overnight trips: 12.2m)
SPA-FT data: 750

240m London day trips
(made by Londoners)

Great Britain Day Visits Survey (GBDVS) 2012 / Great Britain Tourism Survey (GBTS) 2012 / International Passenger Survey (IPS) 2012
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

- **Segment 1**: Tourists
- **Segment 2**: Socialites
- **Segment 3**: Explorers
- **Segment 4**: House Guests
- **Segment 5**: Focused Visitors
- **Segment 6**: London Enthusiasts

Key activities:
- **Entertainment/culture**
  - London Transport Museum
  - Art gallery
  - Musical/Theatre
- **Non-planned entertainment/culture**
  - Sporting event
  - Concert/music event/exhibition
  - Bar / club
  - Restaurant

Key attitudes:
- Planners
  - Planned entertainment/culture
  - Planned tourism
- Non-planners
  - Non-planned entertainment/culture
  - Non-planned social tourism

Key locations:
- London's history key
- Organised sightseeing tour
- Always wanted to visit London
- Paid for visitor attraction
- Street market
- Main shopping area
- Park (e.g., Hyde Park)
- Museum

Londons history key

**Non-planners**
Introducing the visitor segmentation

Segment 1: Tourists
- Always wanted to visit London
- Paid for visitor attraction

Segment 2: Socialites
- Friends/family

Segment 3: Explorers
- London Transport Museum
- Art gallery

Segment 4: House Guests
- Musical/Theatre
- Park (eg Hyde Park)

Segment 5: Focused Visitors

Segment 6: London Enthusiasts
- Organised sightseeing tour
- Planned tourism

Touchpoints:
- Reassurance Seekers
- Explorer

Key:
- Activities
- Attitudes

Planners
- Planned entertainment/culture
- London's history key

Non-planners
- Non-planned entertainment/culture
- Non-planned social tourism

Tourism
- Main shopping area
- Street market
- Bar / club
- Restaurant
Putting the segments into perspective

**UK Visitors to London**

- Segment 1: Tourists - 12.01m
- Segment 2: Socialites - 3.70m (All sub group 6a)
- Segment 3: Explorers - 2.02m
- Segment 4: House Guests - 3.09m
- Segment 5: Focused Visitors - 1.88m
- Segment 6: London Enthusiast - 1.16m

**International Visitors to London**

- Segment 5: Focused Visitors - 1.20m
- Segment 6: London Enthusiast - 2.98m
- Segment 6: London Enthusiast - 1.53m
- Sub group 5a: 1.08m
- Sub group 5b: 7.69m
- Sub group 6a: 1.08m
- Sub group 6b: 1.90m

**TOTAL:**

- UK: 22.71m visitors
- International: 10.13m visitors

**Touchpoints**

- Seekers
- Explorer
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% Male, 57% Female
- **Have children**: 38% Have children, 60% No children
- **Age**:
  - 17% 18-24
  - 23% 25-34
  - 18% 35-44
  - 21% 45-54
  - 21% 55+
- **Country visiting from**:
  - 13% Germany
  - 13% France
  - 13% Italy
  - 13% China
  - 12% USA
  - 11% Spain
  - 9% Brazil

### Pre - arrival

- **Pre-planners**: 64%
- **Research / book various aspects**: (+23% by someone else)
- **Plan travel around London**: 52%
  - Sources used:
    - Tour operator
    - (*Street market*)
    - (+23% by someone else)
- **Plan / research ticketed and non-ticketed activities**:
  - Ticketed activities:
  - Non-ticketed activities:

### 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
- **Tickets used**:
  - Single/return tickets
  - Visitor Oyster card
  - Multiple days travel card on paper
- **Positive perceptions of driving in London**
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% Male
  - 53% Female

- **Have children**
  - 26% Have children
  - 74% No children

- **Age**
  - 15% 18-24
  - 20% 25-34
  - 19% 35-44
  - 20% 45-54
  - 27% 55+

- **Country visiting from**
  - 23% UK
  - 12% Spain
  - 11% Poland
  - 9% Italy
  - 8% Germany
  - 8% USA

Country visiting from shown if 8% or above

### Pre Arrival / Planning

- **Tend to plan on the go**
  - 55%

- **Use own device via wifi to research in London**

### Arrival

- **Travel alone..**
- **..by plane..**
- **..to visit friends/family**

- **Stay avg. 6 nights with friends/family**

### 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**
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

- **Gender**: 53% Male, 47% Female
- **Have children**: 34% Yes, 64% No
- **Age**:
  - 17% 18-24
  - 20% 25-34
  - 17% 35-44
  - 18% 45-54
  - 28% 55+
- **Country visiting from**:
  - 25% UK
  - 13% Italy
  - 12% Spain
  - 10% Germany
  - 10% USA
  - 9% France

### Pre Arrival / Planning

- **Pre-planners**: 49%
- **Research a lot but unlikely to book (except accommodation which book)**
- **Plan travel around London**: 42%
- **Sources used**:
  - Maps
  - Hotel staff

### At destination

- **Mid spend**: Average £167 a day, £778 a trip
- **Ticketed activities**:
- **Non-ticketed activities**:
  - **Transport tickets used**:
    - One day travel card
    - Visitor Oyster card
  - 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

<table>
<thead>
<tr>
<th>Gender</th>
<th>Male</th>
<th>Female</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Have children</strong></td>
<td>33%</td>
<td>65%</td>
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<tr>
<td><strong>Age:</strong></td>
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<tr>
<td>18-24</td>
<td>16%</td>
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<td>25-34</td>
<td>19%</td>
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<td>35-44</td>
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<td>45-54</td>
<td>16%</td>
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<tr>
<td>55+</td>
<td>28%</td>
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</tr>
</tbody>
</table>

### At destination

- **Low spend**: Average £127 a day, £467 a trip

- **Ticketed activities**: Do not plan / research any activities

- **Non-ticketed activities**:

- **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

- **Country visiting from**

<table>
<thead>
<tr>
<th>Country visiting from</th>
<th>25%</th>
<th>17%</th>
<th>10%</th>
<th>8%</th>
<th>8%</th>
</tr>
</thead>
<tbody>
<tr>
<td>UK</td>
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<td>Ireland</td>
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<td>France</td>
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<td>Italy</td>
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</tr>
</tbody>
</table>

Country visiting from shown if 8% or above
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

#### Gender
- Male: 53%
- Female: 47%

#### Age
<table>
<thead>
<tr>
<th>Group</th>
<th>International 5a</th>
<th>UK 5b</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-24</td>
<td>14%</td>
<td>20%</td>
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<tr>
<td>25-34</td>
<td>20%</td>
<td>18%</td>
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<tr>
<td>35-44</td>
<td>18%</td>
<td>17%</td>
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<tr>
<td>45-54</td>
<td>30%</td>
<td>5%</td>
</tr>
<tr>
<td>55+</td>
<td>30%</td>
<td>5%</td>
</tr>
</tbody>
</table>

**International 5a**: Male – 61%, Female – 39%
**UK 5b**: Male – 43%, Female – 57%

**International 5a**
Country visiting from:
- UK: 67%
- France: 5%
- Germany: 5%
- Australia: 4%
- Italy: 3%
- Spain: 3%
- Netherlands: 3%

**UK 5b**
- All respondents from UK
- France: 14%
- Germany: 20%
- Australia: 18%
- Italy: 17%
- Spain: 14%
- Netherlands: 5%

### Arrival

#### Travel alone..
- **International 5a**
  - by plane...
- **UK 5b**
  - by train or their own vehicle..

#### for business
- **International 5a**
  - for business
- **UK 5b**
  - to visit friends / family

### 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

**Pre Arrival / Planning**

#### Pre-planners
- 53%
  - Planning focused on specific thing

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

#### But do purchase transport tickets in advance

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

18-24 25-34 35-44 45-54 55+

28% 28% 14% 15% 15%

Pre Arrival / Planning

Pre-planners.. 74%

..As well as on the go

72%

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

Arrival

Travel as a group..

Active 6a

Relaxed 6b

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

..by hire car, coach

Stay avg. 7 nights in..

Active 6a

Relaxed 6b

hotels of 4-5*

hostel or B&B

At destination

Highest spend

Average £246 a day, £1,222 a trip

Active 6a

Relaxed 6b

£1, 379 trip

£1, 062 trip

Ticketed activities:

• Everything, particularly Active 6a

Non-ticketed activities:

• Active 6a – everything

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

<table>
<thead>
<tr>
<th>Segment 1</th>
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<th>Segment 5</th>
<th>Segment 6</th>
</tr>
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<tbody>
<tr>
<td><strong>Tourists</strong></td>
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<td><strong>Focused Visitors</strong></td>
<td><strong>London Enthusiast</strong></td>
</tr>
<tr>
<td>Travelling as…</td>
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<tr>
<td>Group</td>
<td>Alone</td>
<td>Couple</td>
<td>Alone</td>
<td></td>
<td>Group</td>
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<tr>
<td>Getting to London</td>
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<tr>
<td>Plane</td>
<td>Bus</td>
<td>Train</td>
<td>Coach</td>
<td>A</td>
<td>A</td>
</tr>
<tr>
<td>Coach</td>
<td>Plane</td>
<td>Coach</td>
<td>Own car</td>
<td>B</td>
<td>B</td>
</tr>
<tr>
<td>Attitudes to London</td>
<td>Weekend destination</td>
<td>Best for sightseeing</td>
<td>Weekend destination</td>
<td>Weekend destination</td>
<td>Weekend destination</td>
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<tr>
<td>Best for sightseeing</td>
<td>Once in a lifetime trip</td>
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<tr>
<td>Reasons for visiting</td>
<td></td>
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<tr>
<td>Holiday/Leisure</td>
<td>Friends/Family</td>
<td>Holiday/Leisure</td>
<td>Business</td>
<td>A</td>
<td>A</td>
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<tr>
<td>Friends/Family</td>
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<td>Friends/Family</td>
<td>B</td>
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<tr>
<td>Holiday/Leisure</td>
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<td>Holiday/Leisure</td>
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<tr>
<td>Mean number of nights</td>
<td>5</td>
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<td>Accommodation</td>
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<td>Hotel (3/4/5*)</td>
<td>Friends/Family</td>
<td>Hotel (up to 3*)</td>
<td>Friends/Family</td>
<td>Hostel B&amp;B</td>
<td>Hotel (4/5*)</td>
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<tr>
<td>Friends/Family</td>
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<td>Friends/Family</td>
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<tr>
<td>Hostel B&amp;B</td>
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</tbody>
</table>
### Segment overview – Pre-arrival / Planning

<table>
<thead>
<tr>
<th>Segment 1</th>
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<th>Segment 4</th>
<th>Segment 5</th>
<th>Segment 6</th>
</tr>
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<tbody>
<tr>
<td><strong>Tourists</strong></td>
<td><strong>Socialites</strong></td>
<td><strong>Explorers</strong></td>
<td><strong>House Guests</strong></td>
<td><strong>Focused Visitors</strong></td>
<td><strong>London Enthusiast</strong></td>
</tr>
<tr>
<td>Pre-planners (plan before they arrive)</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Pre-planners book in advance</td>
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<td>Airport transfers</td>
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<td>✔️</td>
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<tr>
<td>Accommodation</td>
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<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
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<tr>
<td>Planners on the go (plan once they arrive)</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Plan on the go, research online on the go</td>
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<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
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<tr>
<td>Smartphone via wifi</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
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<tr>
<td>Plan travel around London</td>
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<tr>
<td>Asking people</td>
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<tr>
<td>Hotel staff</td>
<td>✔️</td>
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<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Advance Public Transport ticket purchasers</td>
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<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Multiple travel card on Oyster, Visitor Oyster card</td>
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<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
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<tr>
<td>Oyster card, single /return tickets, One day travel card</td>
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<td>✔️</td>
<td>✔️</td>
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</tbody>
</table>
## Segmentation overview - At destination activities

<table>
<thead>
<tr>
<th>Segment 1</th>
<th>Segment 2</th>
<th>Segment 3</th>
<th>Segment 4</th>
<th>Segment 5</th>
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<td><strong>London Enthusiast</strong></td>
</tr>
</tbody>
</table>

| **Highest average spend per trip** | | | | | | **£1,379** | **£1,062** |
| **Ticketed activities** | | | | | | | |
| Paid for visitor attraction / organised sightseeing tour | Concert / music event / exhibition | Paid for visitor attraction | | | | |
| **Planning / researching ticketed activities** | | | | | | | |
| Before and during trip | Before and during trip | Before and during trip | Before and during trip | Before and during trip | 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 | | | |
| **Planning / researching non-ticketed activities** | | | | | | | |
| Before and during trip | Before and during trip | Before and during trip | Before and during trip | | | |
# Segmentation overview - At destination transport

<table>
<thead>
<tr>
<th>Segment 1 Tourists</th>
<th>Segment 2 Socialites</th>
<th>Segment 3 Explorers</th>
<th>Segment 4 House Guests</th>
<th>Segment 5 Focused Visitors</th>
<th>Segment 6 London Enthusiast</th>
</tr>
</thead>
<tbody>
<tr>
<td>Heavy public transport users</td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Tickets used</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Perceptions of public transport</td>
<td></td>
<td>Iconic</td>
<td></td>
<td>Frustrating</td>
<td></td>
</tr>
<tr>
<td>Drive in London</td>
<td></td>
<td>Own car</td>
<td></td>
<td>Own car</td>
<td></td>
</tr>
<tr>
<td>Perceptions of driving in London</td>
<td></td>
<td></td>
<td></td>
<td>Frustrating / Dangerous / Unreliable</td>
<td></td>
</tr>
</tbody>
</table>

1. **Segment 1 Tourists**
   - Heavy public transport users
   - Tickets used
   - Drive in London (Own car)
   - Perceptions of driving in London

2. **Segment 2 Socialites**
   - Heavy public transport users
   - Tickets used
   - Drive in London (Own car)
   - Perceptions of driving in London

3. **Segment 3 Explorers**
   - Heavy public transport users
   - Tickets used
   - Drive in London (Own car)
   - Perceptions of driving in London

4. **Segment 4 House Guests**
   - Heavy public transport users
   - Tickets used
   - Drive in London (Own car)
   - Perceptions of driving in London

5. **Segment 5 Focused Visitors**
   - Heavy public transport users
   - Tickets used
   - Drive in London (Hire car. Most likely to research and book hire car)
   - Perceptions of driving in London (Frustrating)

6. **Segment 6 London Enthusiast**
   - Heavy public transport users
   - Tickets used
   - Drive in London (Own car)
   - Perceptions of driving in London (Iconic)
Pre Arrival - Marketing / Commercial summary

**Marketing**

**Research findings**
- Plan travel in advance:
  - Segment 1 Tourists
  - Segment 3 Explorers
- Purchase tickets in advance:
  - Segment 5 Focused Visitors
  - Segment 6 London Enthusiast
- Plan trip on the go:
  - Segment 2 Socialites
  - Segment 6 London Enthusiast

**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:
  - Segment 1 Tourists
  - Segment 3 Explorers
  - Segment 6 London Enthusiast
- Plan trip on the go:
  - Segment 2 Socialites
  - Segment 6 London Enthusiast

**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

**Research findings**

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

**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

#### Research findings

<table>
<thead>
<tr>
<th>To London by plane:</th>
<th>by train:</th>
<th>by coach:</th>
</tr>
</thead>
<tbody>
<tr>
<td>International 5a</td>
<td>Segment 1 Tourists</td>
<td>Segment 2 Socialites</td>
</tr>
<tr>
<td></td>
<td>Segment 3 Explorers</td>
<td>UK 5b</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Active 6a</td>
</tr>
</tbody>
</table>

Most likely to go to ticketed activities in London:

<table>
<thead>
<tr>
<th>Segment 1 Tourists</th>
<th>Segment 6 London Enthusiast</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Active 6a</td>
</tr>
</tbody>
</table>

Most likely to go to non-ticketed activities:

<table>
<thead>
<tr>
<th>Segment 1 Tourists</th>
<th>Segment 2 Socialites</th>
</tr>
</thead>
<tbody>
<tr>
<td>Segment 3 Explorers</td>
<td>Active 6a</td>
</tr>
</tbody>
</table>

Coach users in the Capital:

<table>
<thead>
<tr>
<th>Segment 1 Tourists</th>
<th>Segment 6 London Enthusiast</th>
</tr>
</thead>
</table>

Black cab/taxi users:

| Segment 3 Explorers | Segment 6 London Enthusiast |

Hire car users:

| Segment 6 London Enthusiast |

#### Commercial opportunities

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

Segment 4 House Guests

Segment 5 Focused Visitors

Segment 2 Socialites

Segment 1 Tourists

Segment 3 Explorers

Segment 6 London Enthusiast

Least opportunity

Most opportunity

21

Numbers shown in brackets refer to total sample.

- 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 airports and coach companies

- 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 websites
- Connections with train companies, coach companies, black cabs

- Advance tickets purchases
- 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 car clubs, coach companies and black cabs
Thank you
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.

**Segment 1 Tourists**
- Less likely to plan trip in advance: 54%
- More likely to plan trip in advance: 46%
- Less likely to plan on the go: 29%
- More likely to plan on the go: 71%

**Segment 2 Socialites**
- Less likely to plan trip in advance: 31%
- More likely to plan trip in advance: 69%
- Less likely to plan on the go: 25%
- More likely to plan on the go: 75%

**Segment 3 Explorers**
- Less likely to plan trip in advance: 53%
- More likely to plan trip in advance: 47%
- Less likely to plan on the go: 50%
- More likely to plan on the go: 50%

**Segment 4 House Guests**
- Less likely to plan trip in advance: 29%
- More likely to plan trip in advance: 71%
- Less likely to plan on the go: 25%
- More likely to plan on the go: 75%

**Segment 5 Focused Visitors**
- Less likely to plan trip in advance: 49%
- More likely to plan trip in advance: 51%
- Less likely to plan on the go: 46%
- More likely to plan on the go: 54%

**Segment 6 London Enthusiast**
- Less likely to plan trip in advance: 52%
- More likely to plan trip in advance: 48%
- Less likely to plan on the go: 29%
- More likely to plan on the go: 71%

**Non planners**
- (neither pre-plan nor on the go)

**Pre-planners**
- (I planned everything about my trip to London before leaving home)
- NET Agree: 66%

**Plan as they go**
- (I decided what to do as I went along and did not plan much in advance)
- NET Agree: 46%

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

<table>
<thead>
<tr>
<th>Region</th>
<th>Less likely to plan in advance</th>
<th>More likely to plan in advance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accommodation</td>
<td>41% 65%</td>
<td>86% 53%</td>
</tr>
<tr>
<td>Attractions</td>
<td>37% 13%</td>
<td>80% 71%</td>
</tr>
<tr>
<td>Public transport</td>
<td>45% 14%</td>
<td>68% 71%</td>
</tr>
<tr>
<td>Restaurants</td>
<td>37% 12%</td>
<td>70% 71%</td>
</tr>
<tr>
<td>Airport transfer</td>
<td>9% 27%</td>
<td>60% 79%</td>
</tr>
</tbody>
</table>

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.

International 5a

More likely to research/book accommodation and airport transfers

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

<table>
<thead>
<tr>
<th>Aspects of trip researched on the go</th>
<th>Restaurants</th>
<th>Public transport info</th>
<th>Attractions</th>
<th>Theatre / concert tickets</th>
<th>Road traffic information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre-planners</td>
<td>18%</td>
<td>18%</td>
<td>14%</td>
<td>8%</td>
<td>7%</td>
</tr>
<tr>
<td>On the go planners</td>
<td>39%</td>
<td>38%</td>
<td>36%</td>
<td>22%</td>
<td>18%</td>
</tr>
<tr>
<td>More likely to plan on the go</td>
<td>57%</td>
<td>52%</td>
<td>61%</td>
<td>34%</td>
<td>36%</td>
</tr>
</tbody>
</table>

Planners on the go segments

<table>
<thead>
<tr>
<th>Less likely to plan on the go</th>
<th>More likely to plan on the go</th>
</tr>
</thead>
<tbody>
<tr>
<td>Segment 2 Socialites</td>
<td>Segment 6 London Enthusiast</td>
</tr>
<tr>
<td>Relaxed 6b</td>
<td>Active 6a</td>
</tr>
<tr>
<td>Restaurants</td>
<td>38%</td>
</tr>
<tr>
<td>Public transport info</td>
<td>41%</td>
</tr>
<tr>
<td>Attractions</td>
<td>36%</td>
</tr>
<tr>
<td>Theatre / concert tickets</td>
<td>19%</td>
</tr>
<tr>
<td>Road traffic information</td>
<td>17%</td>
</tr>
</tbody>
</table>

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

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

- Used internet: 53%, 78%, 90%
- Using own device (Laptop, Smartphone, Tablet): 47%, 63%, 74%
- Used Tablet: 10%, 20%, 41%
- Used Smartphone: 41%, 54%, 63%
- Using a shared computer (internet café/hotel): 6%, 22%, 33%

*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

<table>
<thead>
<tr>
<th>Less likely to plan on the go</th>
<th>More likely to plan on the go</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Segment 2 Socialites</strong></td>
<td><strong>Segment 6 London Enthusiast</strong></td>
</tr>
<tr>
<td>82%</td>
<td>86%</td>
</tr>
</tbody>
</table>

- **Mobile device**
  - 22% Tablet
  - 66% Smartphone
- **Via wifi**
  - 56%
- **Via mobile phone connection**
  - 29%
- **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%)
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.

**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**

<table>
<thead>
<tr>
<th>Region</th>
<th>Segments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Planned travel around London</td>
<td>Less likely to plan travel</td>
</tr>
<tr>
<td>28%</td>
<td>Segment 5 Focused Visitors</td>
</tr>
<tr>
<td>30%</td>
<td>Most don’t plan as already know what they are doing</td>
</tr>
<tr>
<td>54%</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Segment 6 London Enthusiast</td>
</tr>
<tr>
<td></td>
<td>Most already know what they are doing or worked things out as they went</td>
</tr>
<tr>
<td></td>
<td>Planned to make it simple/efficient</td>
</tr>
<tr>
<td></td>
<td>A further 23% had their travel planned but by someone else</td>
</tr>
</tbody>
</table>

| | Less likely to purchase tickets | More likely to purchase |
| | Segment 3 Explorers | 16% |
| | Segment 1 Tourists | 19% |
| | Segment 5 Focused Visitors | 30% |
| | Segment 6 London Enthusiast | 37% |
| | Relaxed 6b | 34% |
| | Active 6a | 41% |
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.

**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

**Travel planners – sources used to plan**

### Planners of travel segments

**Segment 1: Tourists**
- **88%** Paper (net)  
- **63%** maps  
- **62%** guidebooks  
- **86%** Online sources (net)  
- **57%** TfL website  
- **52%** friends/family  
- **66%** tour operator  
- **31%** Ask people (net)

**Segment 3: Explorers**
- **86%** Paper (net)  
- **71%** maps  
- **54%** guidebooks  
- **62%** Online sources (net)  
- **34%** TfL website  
- **41%** friends/family  
- **31%** tour operator  
- **58%** Ask people (net)  
- **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*
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

<table>
<thead>
<tr>
<th>Segment 6</th>
<th>37%</th>
</tr>
</thead>
<tbody>
<tr>
<td>London Enthusiast</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Segment 5</th>
<th>30%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Focused Visitors</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>71%</th>
<th>57%</th>
<th>12%</th>
<th>9%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Paper ticket</td>
<td>Oyster</td>
<td>Contactless credit card on the bus</td>
<td>Free Olympic-Paralympic travel card</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>73%</th>
<th>33%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Paper ticket</td>
<td>Oyster</td>
</tr>
</tbody>
</table>

**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

<table>
<thead>
<tr>
<th>Active 6a</th>
</tr>
</thead>
<tbody>
<tr>
<td>More likely to buy Oyster card, single/return tickets and One day travel card</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>International 5a</th>
</tr>
</thead>
<tbody>
<tr>
<td>More likely to buy Multiple travel card on Oyster or Visitor Oyster card than UK 5b</td>
</tr>
</tbody>
</table>
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.

<table>
<thead>
<tr>
<th>Question: C1: Still thinking of your (most recent) visit to London, how much do you agree with the following statements? Base: All</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>NET Agree</strong></td>
</tr>
<tr>
<td>Travelling to London was a once in a lifetime trip</td>
</tr>
<tr>
<td>London has the best sightseeing of any city in the world</td>
</tr>
<tr>
<td>You can do London in a weekend</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Region</th>
<th>Segment</th>
</tr>
</thead>
<tbody>
<tr>
<td>NET Agree</td>
<td>Explorer</td>
</tr>
<tr>
<td>Travelling to London was a once in a lifetime trip</td>
<td>More likely to agree</td>
</tr>
<tr>
<td>London has the best sightseeing of any city in the world</td>
<td>Segment 3 Explorers</td>
</tr>
<tr>
<td>You can do London in a weekend</td>
<td>Segment 2 Socialites</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Segment</th>
<th>Less likely to agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tourists</td>
<td>Segment 4 House Guests</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Segment</th>
<th>More likely to agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Explorers</td>
<td>Segment 3 Explorers</td>
</tr>
<tr>
<td>London Enthusiast</td>
<td>Segment 2 Socialites</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Segment</th>
<th>Less likely to agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>House Guests</td>
<td>Segment 4 House Guests</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Segment</th>
<th>More likely to agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tourists</td>
<td>Segment 4 House Guests</td>
</tr>
<tr>
<td>Explorers</td>
<td>Segment 3 Explorers</td>
</tr>
<tr>
<td>London Enthusiast</td>
<td>Segment 2 Socialites</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Segment</th>
<th>Less likely to agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>House Guests</td>
<td>Segment 4 House Guests</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Segment</th>
<th>More likely to agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tourists</td>
<td>Segment 4 House Guests</td>
</tr>
<tr>
<td>Explorers</td>
<td>Segment 3 Explorers</td>
</tr>
<tr>
<td>London Enthusiast</td>
<td>Segment 2 Socialites</td>
</tr>
</tbody>
</table>
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.

### Mean no. people

<table>
<thead>
<tr>
<th>Region</th>
<th>Tourists</th>
<th>Socialites</th>
<th>House Guests</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.53</td>
<td>3.10</td>
<td>2.85</td>
<td></td>
</tr>
</tbody>
</table>

### Segment

<table>
<thead>
<tr>
<th>Segment</th>
<th>Mean no. people</th>
<th>Large groups</th>
<th>Small groups</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tourists</td>
<td>4.98</td>
<td>29%</td>
<td>19%</td>
</tr>
<tr>
<td>Socialites</td>
<td>3.26</td>
<td>35%</td>
<td></td>
</tr>
<tr>
<td>Focused Visitors</td>
<td>2.72</td>
<td>23%</td>
<td></td>
</tr>
<tr>
<td>Explorers</td>
<td>2.60</td>
<td>34%</td>
<td></td>
</tr>
<tr>
<td>House Guests</td>
<td>2.03</td>
<td>24%</td>
<td></td>
</tr>
<tr>
<td>London Enthusiast</td>
<td>1.55</td>
<td>27%</td>
<td></td>
</tr>
</tbody>
</table>

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

*Base: All*
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.

<table>
<thead>
<tr>
<th>Region</th>
<th>Less likely to travel by</th>
<th>More likely to travel by</th>
</tr>
</thead>
<tbody>
<tr>
<td>Plane</td>
<td>5%</td>
<td>67%</td>
</tr>
<tr>
<td>Train</td>
<td>63%</td>
<td>24%</td>
</tr>
<tr>
<td>Own vehicle</td>
<td>28%</td>
<td>11%</td>
</tr>
<tr>
<td>Coach</td>
<td>13%</td>
<td>13%</td>
</tr>
<tr>
<td>Hired vehicle</td>
<td>3%</td>
<td>10%</td>
</tr>
</tbody>
</table>

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.

<table>
<thead>
<tr>
<th>Region</th>
<th>Segment</th>
<th>Holiday</th>
<th>Visit friends/family</th>
</tr>
</thead>
<tbody>
<tr>
<td>Holiday / leisure</td>
<td>Segment 1 Tours</td>
<td>83%</td>
<td>83%</td>
</tr>
<tr>
<td>Visiting friends / family</td>
<td>Segment 3 Explorers</td>
<td>85%</td>
<td>85%</td>
</tr>
<tr>
<td>Business</td>
<td>Segment 4 House Guests</td>
<td>46%</td>
<td>46%</td>
</tr>
<tr>
<td>Personal business</td>
<td>Segment 2 Socialites</td>
<td>49%</td>
<td>49%</td>
</tr>
<tr>
<td>Segment 5 Focused Visitors</td>
<td>Segment 6 London Enthusiast</td>
<td>78%</td>
<td>78%</td>
</tr>
</tbody>
</table>

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
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.

<table>
<thead>
<tr>
<th>Region</th>
<th>Mean no. of nights</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotel (up to 3*)</td>
<td>1.91</td>
</tr>
<tr>
<td>Hotel (4* or 5*)</td>
<td>5.91</td>
</tr>
<tr>
<td>Friends/Family</td>
<td>7.34</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Segment</th>
<th>Mean no. of nights</th>
</tr>
</thead>
<tbody>
<tr>
<td>Segment 1 Tourists</td>
<td>4.74</td>
</tr>
<tr>
<td>Segment 2 Socialities</td>
<td>6.47</td>
</tr>
<tr>
<td>Segment 3 Explorers</td>
<td>5.03</td>
</tr>
<tr>
<td>Segment 4 House Guests</td>
<td>4.10</td>
</tr>
<tr>
<td>Segment 5 Focused Visitors</td>
<td>2.96</td>
</tr>
<tr>
<td>Segment 6 London Enthusiast</td>
<td>6.60</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Accommodation</th>
<th>Mean no. of nights</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotel (up to 3*)</td>
<td>38% 38% 36%</td>
</tr>
<tr>
<td>Hotel (4* or 5*)</td>
<td>30% 29% 55%</td>
</tr>
<tr>
<td>Friends/Family</td>
<td>29% 22% 14%</td>
</tr>
<tr>
<td>B&amp;B</td>
<td>8% 15% 15%</td>
</tr>
<tr>
<td>Hostel/campus</td>
<td>3% 7% 6%</td>
</tr>
<tr>
<td>Serviced Accommodation</td>
<td>2% 5% 8%</td>
</tr>
</tbody>
</table>

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
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.

<table>
<thead>
<tr>
<th>Region</th>
<th>Segment</th>
<th>Less likely</th>
<th>More likely</th>
</tr>
</thead>
<tbody>
<tr>
<td>I made day trips outside London</td>
<td>Segment 3 Explorers</td>
<td>26%</td>
<td>31%</td>
</tr>
<tr>
<td></td>
<td>Segment 6 London Enthusiast</td>
<td>24%</td>
<td>44%</td>
</tr>
<tr>
<td>I stayed at least one night outside London</td>
<td>Segment 5 Focused Visitors</td>
<td>24%</td>
<td>44%</td>
</tr>
<tr>
<td>I only visited London</td>
<td>Segment 6 London Enthusiast</td>
<td>49%</td>
<td>24%</td>
</tr>
</tbody>
</table>

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
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.

<table>
<thead>
<tr>
<th>Region</th>
<th>Segment</th>
<th>Average spend per day</th>
<th>Average spend per trip</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Segment 1 Tourists</td>
<td>£207</td>
<td>£998</td>
</tr>
<tr>
<td></td>
<td>Segment 2 Socialites</td>
<td>£167</td>
<td>£778</td>
</tr>
<tr>
<td></td>
<td>Segment 3 Explorers</td>
<td>£126</td>
<td>£556</td>
</tr>
<tr>
<td></td>
<td>Segment 4 House Guests</td>
<td>£127</td>
<td>£467</td>
</tr>
<tr>
<td></td>
<td>Segment 5 Focused Visitors</td>
<td>£107</td>
<td>£294</td>
</tr>
<tr>
<td></td>
<td>Segment 6 London Enthusiast</td>
<td>£246</td>
<td>£1,222</td>
</tr>
</tbody>
</table>

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

5a: £390 6a: £1,379 5b: £171 6b: £1,062
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.

<table>
<thead>
<tr>
<th>Activity</th>
<th>Region</th>
<th>Segment 1 Tourists</th>
<th>Segment 2 Socialites</th>
<th>Segment 3 Explorers</th>
<th>Segment 4</th>
<th>Segment 5a International</th>
<th>Segment 6 London Enthusiast</th>
</tr>
</thead>
<tbody>
<tr>
<td>A paid for visitor attraction</td>
<td>20%</td>
<td>58%</td>
<td>50%</td>
<td>72%</td>
<td></td>
<td>47%</td>
<td>58%</td>
</tr>
<tr>
<td>A Musical/Theatre production</td>
<td>23%</td>
<td>22%</td>
<td>40%</td>
<td>45%</td>
<td></td>
<td>22%</td>
<td>40%</td>
</tr>
<tr>
<td>An organised sightseeing tour</td>
<td>9%</td>
<td>22%</td>
<td>33%</td>
<td>47%</td>
<td></td>
<td>47%</td>
<td>33%</td>
</tr>
<tr>
<td>A concert/music event/exhibition</td>
<td>16%</td>
<td>19%</td>
<td>22%</td>
<td>37%</td>
<td></td>
<td>22%</td>
<td>22%</td>
</tr>
<tr>
<td>A sporting event (not Olympics/Paralympics)</td>
<td>10%</td>
<td>12%</td>
<td>23%</td>
<td>37%</td>
<td></td>
<td>23%</td>
<td>23%</td>
</tr>
<tr>
<td>Olympic or Paralympic event*</td>
<td>11%</td>
<td>8%</td>
<td>12%</td>
<td>24%</td>
<td></td>
<td>12%</td>
<td>12%</td>
</tr>
</tbody>
</table>

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

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
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.

<table>
<thead>
<tr>
<th>Region</th>
<th>Segment 1 Tourists</th>
<th>Segment 2 Socialites</th>
<th>Segment 3 Explorers</th>
<th>Segment 4 House Guests</th>
</tr>
</thead>
<tbody>
<tr>
<td>A restaurant</td>
<td>Active 6a</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>One of the main shopping areas</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>A park</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>A museum</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>A bar or club in the evening</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>A street market</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Friends/family</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>An art gallery</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>London Transport Museum</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

- **Segment 2 Socialites**: 51% researched or booked prior to arriving in London, 38% researched online while in London, and 90% visited/went to.
- **Segment 3 Explorers**: 59% researched or booked prior to arriving in London, 39% researched online while in London, and 86% visited/went to.
- **Segment 1 Tourists**: 65% researched or booked prior to arriving in London, 45% researched online while in London, and 79% visited/went to.
- **Segment 4 House Guests**: 79% researched or booked prior to arriving in London, 57% researched online while in London, and 77% visited/went to.

**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
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.

## Use of public transport

<table>
<thead>
<tr>
<th>Region</th>
<th>Segment 1 Toursits</th>
<th>Segment 2 Socialites</th>
<th>Segment 3 Explorers</th>
<th>Segment 4 House Guests</th>
<th>Segment 5 Focused Visitors</th>
<th>Segment 6 London Enthusiast</th>
</tr>
</thead>
<tbody>
<tr>
<td>Public transport:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tube / Underground</td>
<td>74%</td>
<td>79%</td>
<td>89%</td>
<td>80%</td>
<td>81%</td>
<td>80%</td>
</tr>
<tr>
<td>Bus</td>
<td>30%</td>
<td>70%</td>
<td>74%</td>
<td>6%</td>
<td>70%</td>
<td>74%</td>
</tr>
<tr>
<td>Train</td>
<td>29%</td>
<td>31%</td>
<td>74%</td>
<td>29%</td>
<td>70%</td>
<td>75%</td>
</tr>
<tr>
<td>River boat</td>
<td>7%</td>
<td>17%</td>
<td>17%</td>
<td>7%</td>
<td>7%</td>
<td>7%</td>
</tr>
<tr>
<td>DLR</td>
<td>7%</td>
<td>14%</td>
<td>7%</td>
<td>7%</td>
<td>7%</td>
<td>7%</td>
</tr>
<tr>
<td>Tram</td>
<td>3%</td>
<td>14%</td>
<td>3%</td>
<td>3%</td>
<td>14%</td>
<td>2%</td>
</tr>
<tr>
<td>Emirates Air Line</td>
<td>2%</td>
<td>7%</td>
<td>2%</td>
<td>2%</td>
<td>2%</td>
<td>2%</td>
</tr>
</tbody>
</table>

6a are more likely than 6b to use all these modes except bus.

5a: more likely than 5b to use bus.

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

### Region

<table>
<thead>
<tr>
<th>Public transport users:</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>83%</td>
<td>93%</td>
<td>93%</td>
</tr>
<tr>
<td>Net: Paper ticket</td>
<td>74%</td>
<td>72%</td>
</tr>
<tr>
<td>Single/return ticket</td>
<td>41%</td>
<td>43%</td>
</tr>
<tr>
<td>One day travel card</td>
<td>46%</td>
<td>35%</td>
</tr>
<tr>
<td>Multiple days travel</td>
<td>2%</td>
<td>15%</td>
</tr>
<tr>
<td>card on paper</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Net: Oyster</td>
<td>33%</td>
<td>39%</td>
</tr>
<tr>
<td>Oyster card</td>
<td>27%</td>
<td>20%</td>
</tr>
<tr>
<td>Visitor Oyster card</td>
<td>6%</td>
<td>17%</td>
</tr>
<tr>
<td>Multiple days on Oyster</td>
<td>3%</td>
<td>12%</td>
</tr>
<tr>
<td>Contactless credit card on bus</td>
<td>1%</td>
<td>5%</td>
</tr>
<tr>
<td>Free Olympic/Paralympic card</td>
<td>4%</td>
<td>4%</td>
</tr>
</tbody>
</table>

### Segment

<table>
<thead>
<tr>
<th>Segment 1 Tourists</th>
<th>Segment 2 Socialites</th>
<th>Segment 3 Explorers</th>
<th>Segment 4 House Guests</th>
<th>Segment 5 Focused Visitors</th>
<th>Segment 6 London Enthusiast</th>
</tr>
</thead>
<tbody>
<tr>
<td>Single / return ticket</td>
<td>Oyster card</td>
<td>Visitor Oyster card</td>
<td>Oyster card</td>
<td>Multiple days on Oyster</td>
<td>Oyster card</td>
</tr>
<tr>
<td>Visitor Oyster card</td>
<td>Multiple days travel card on paper</td>
<td>Contactless credit card on bus</td>
<td>Free Olympic / Paralympic card</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**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.

...
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.

<table>
<thead>
<tr>
<th>Region</th>
<th>Segment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Net: Positive</td>
<td>90%</td>
</tr>
<tr>
<td>Part of London</td>
<td>64%</td>
</tr>
<tr>
<td>experience</td>
<td></td>
</tr>
<tr>
<td>Easily accessible</td>
<td>44%</td>
</tr>
<tr>
<td>for everyone</td>
<td></td>
</tr>
<tr>
<td>Efficient</td>
<td>37%</td>
</tr>
<tr>
<td>Reliable</td>
<td>32%</td>
</tr>
<tr>
<td>Safe</td>
<td>21%</td>
</tr>
<tr>
<td>Iconic</td>
<td>27%</td>
</tr>
<tr>
<td>Fun</td>
<td>13%</td>
</tr>
<tr>
<td>Friendly staff</td>
<td>13%</td>
</tr>
<tr>
<td>Cheap</td>
<td>9%</td>
</tr>
<tr>
<td>Innovative</td>
<td>7%</td>
</tr>
<tr>
<td>Friendly passengers</td>
<td>3%</td>
</tr>
<tr>
<td>Relaxing</td>
<td>4%</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Region</th>
<th>Segment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Net: Positive</td>
<td>95%</td>
</tr>
<tr>
<td>Part of London</td>
<td>51%</td>
</tr>
<tr>
<td>experience</td>
<td></td>
</tr>
<tr>
<td>Easily accessible</td>
<td>40%</td>
</tr>
<tr>
<td>for everyone</td>
<td></td>
</tr>
<tr>
<td>Efficient</td>
<td>39%</td>
</tr>
<tr>
<td>Reliable</td>
<td>34%</td>
</tr>
<tr>
<td>Safe</td>
<td>29%</td>
</tr>
<tr>
<td>Iconic</td>
<td>29%</td>
</tr>
<tr>
<td>Fun</td>
<td>23%</td>
</tr>
<tr>
<td>Friendly staff</td>
<td>20%</td>
</tr>
<tr>
<td>Cheap</td>
<td>12%</td>
</tr>
<tr>
<td>Innovative</td>
<td>12%</td>
</tr>
<tr>
<td>Friendly passengers</td>
<td>13%</td>
</tr>
<tr>
<td>Relaxing</td>
<td>10%</td>
</tr>
</tbody>
</table>

Net: Positive
Part of London experience
Easily accessible for everyone
Efficient
Reliable
Safe
Iconic
Fun
Friendly staff
Cheap
Innovative
Friendly passengers
Relaxing

Most positive
Segment 3 Explorers
Iconic 37%
Segment 2 Socialites
Segment 1 Tourists
Segment 6 London Enthusiast
Relaxing 20%
Segment 4 House Guests
Segment 5 Focused Visitors

5a: more likely to view transport as iconic and cheap
5b: more likely to view as part of London experience
6a: more likely to view as part of London experience and easily accessible

Net: Positive
Part of London experience
Easily accessible for everyone
Efficient
Reliable
Safe
Iconic
Fun
Friendly staff
Cheap
Innovative
Friendly passengers
Relaxing

Least positive
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.

<table>
<thead>
<tr>
<th>Region</th>
<th>Drive (net)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Drive (net)</td>
<td>22%</td>
</tr>
<tr>
<td>Own car</td>
<td>19%</td>
</tr>
<tr>
<td>Hire car</td>
<td>4%</td>
</tr>
<tr>
<td>Walk</td>
<td>61%</td>
</tr>
<tr>
<td>Black cab/Taxi</td>
<td>18%</td>
</tr>
<tr>
<td>Coach</td>
<td>6%</td>
</tr>
<tr>
<td>Minicab</td>
<td>5%</td>
</tr>
<tr>
<td>Barclays Cycle Hire</td>
<td>2%</td>
</tr>
<tr>
<td>Bicycle</td>
<td>1%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Segment</th>
<th>Drive (net)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Segment 1 Tourists</td>
<td>16%</td>
</tr>
<tr>
<td>Segment 2 Socialites</td>
<td>15%</td>
</tr>
<tr>
<td>Segment 3 Explorers</td>
<td>34%</td>
</tr>
<tr>
<td>Segment 4 House Guests</td>
<td>20%</td>
</tr>
<tr>
<td>Segment 5 Focused Visitors</td>
<td>15%</td>
</tr>
<tr>
<td>Segment 6 London Enthusiast</td>
<td>41%</td>
</tr>
</tbody>
</table>

6a are more likely than 6b to use all these modes except hire car or coach.

5a are more likely than 5b to use Emirates Air Line.

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


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.
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.

**Net: positive**
- 55% for Net: positive
- 85% for Part of London experience
- 93% for Fun
- 30% for Flexible
- 13% for Cheaper than alternatives
- 13% for Comfortable
- 12% for Safe
- 11% for Reliable
- 10% for Efficient
- 5% for Relaxing

**Part of London experience**
- 85% for Net: positive
- 45% for Part of London experience
- 28% for Fun
- 18% for Flexible
- 10% for Cheaper than alternatives
- 27% for Comfortable
- 23% for Safe
- 22% for Reliable
- 23% for Efficient
- 17% for Relaxing

**Fun**
- 93% for Net: positive
- 45% for Part of London experience
- 45% for Fun
- 25% for Flexible
- 12% for Cheaper than alternatives
- 37% for Comfortable
- 43% for Safe
- 34% for Reliable
- 28% for Efficient
- 31% for Relaxing

**Flexible**
- 93% for Net: positive
- 39% for Part of London experience
- 45% for Fun
- 39% for Flexible
- 12% for Cheaper than alternatives
- 37% for Comfortable
- 43% for Safe
- 34% for Reliable
- 28% for Efficient
- 31% for Relaxing

**Cheaper than alternatives**
- 93% for Net: positive
- 39% for Part of London experience
- 45% for Fun
- 39% for Flexible
- 12% for Cheaper than alternatives
- 37% for Comfortable
- 43% for Safe
- 34% for Reliable
- 28% for Efficient
- 31% for Relaxing

**Comfortable**
- 93% for Net: positive
- 39% for Part of London experience
- 45% for Fun
- 39% for Flexible
- 12% for Cheaper than alternatives
- 37% for Comfortable
- 43% for Safe
- 34% for Reliable
- 28% for Efficient
- 31% for Relaxing

**Safe**
- 93% for Net: positive
- 39% for Part of London experience
- 45% for Fun
- 39% for Flexible
- 12% for Cheaper than alternatives
- 37% for Comfortable
- 43% for Safe
- 34% for Reliable
- 28% for Efficient
- 31% for Relaxing

**Reliable**
- 93% for Net: positive
- 39% for Part of London experience
- 45% for Fun
- 39% for Flexible
- 12% for Cheaper than alternatives
- 37% for Comfortable
- 43% for Safe
- 34% for Reliable
- 28% for Efficient
- 31% for Relaxing

**Efficient**
- 93% for Net: positive
- 39% for Part of London experience
- 45% for Fun
- 39% for Flexible
- 12% for Cheaper than alternatives
- 37% for Comfortable
- 43% for Safe
- 34% for Reliable
- 28% for Efficient
- 31% for Relaxing

**Relaxing**
- 93% for Net: positive
- 39% for Part of London experience
- 45% for Fun
- 39% for Flexible
- 12% for Cheaper than alternatives
- 37% for Comfortable
- 43% for Safe
- 34% for Reliable
- 28% for Efficient
- 31% for Relaxing

**Segmentation**

**Segment 1 Tourists**
- More likely to drive
- Less likely to drive
- Net: positive
- Part of London experience
- Fun
- Flexible
- Safe
- Reliable
- Efficient
- Relaxing

**Segment 2 Socialites**
- More likely to drive
- Less likely to drive
- Net: positive
- Part of London experience
- Fun
- Flexible
- Safe
- Reliable
- Efficient
- Relaxing

**Segment 3 Explorers**
- More likely to drive
- Less likely to drive
- Net: positive
- Part of London experience
- Fun
- Flexible
- Safe
- Reliable
- Efficient
- Relaxing

**Segment 4 House Guests**
- More likely to drive
- Less likely to drive
- Net: positive
- Part of London experience
- Fun
- Flexible
- Safe
- Reliable
- Efficient
- Relaxing

**Segment 5 Focused Visitors**
- More likely to drive
- Less likely to drive
- Net: positive
- Part of London experience
- Fun
- Flexible
- Safe
- Reliable
- Efficient
- Relaxing

**Segment 6 London Enthusiast**
- Most likely segment to choose
- Negative associations (76%)
- Particularly finding driving in London frustrating (49%), dangerous (27%) or unreliable (15%)

**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

**Caution:** low base (n=39) for Segment 1 Tourists
APPENDIX - Demographics
Demographics of UK, short haul, long haul visitors

UK

Gender

49%  Women  51%  Men

Average age profile

16%  18-24  20%  25-34  17%  35-44  16%  45-54  31%  55+

Marital status

61%  Married/ living with partner  39%  Single/ divorced/ widowed

Number of children

72%  None  13%  1  10%  2  3%  3+

Disability

80%  No disability  19%  Disability

Short haul

Gender

52%  Women  48%  Men

Average age profile

16%  18-24  22%  25-34  22%  35-44  18%  45-54  22%  55+

Marital status

67%  Married/ living with partner  32%  Single/ divorced/ widowed

Number of children

62%  None  17%  1  15%  2  5%  3+

Disability

83%  No disability  14%  Disability

Long haul

Gender

58%  Women  42%  Men

Average age profile

15%  18-24  26%  25-34  24%  35-44  17%  45-54  19%  55+

Marital status

67%  Married/ living with partner  32%  Single/ divorced/ widowed

Number of children

48%  None  30%  1  15%  2  3%  3+

Disability

82%  No disability  15%  Disability

France, Germany, Spain and Italy — 18% each

Ireland, Netherlands and Poland — 9% each

Australia, China and Brazil — 20% each
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.

### Demographics
- **Gender**
  - 43% Female
  - 57% Male

- **Average age profile**
  - 18-24: 17%
  - 25-34: 23%
  - 35-44: 18%
  - 45-54: 21%
  - 55+: 21%

### Marital status / children
- **Marital status**
  - Married / living with partner: 67%
  - Single / divorced / widowed: 33%

- **Number of children**
  - 0 children: 60%
  - 1 child: 25%
  - 2 children: 9%
  - 3 or more children: 4%
  - Prefer not to say: 2%

### Disability
- **Disability**
  - No disability: 89%
  - Disability: 11%

- **Types of disability**
  - Visual impairment – 3%
  - Hearing impairment – 2%
  - Asthma – 2%

### Country visiting from
- **Country visiting from**
  - Germany: 13%
  - France: 13%
  - Italy: 13%
  - China: 13%
  - USA: 12%
  - Spain: 11%
  - Brazil: 9%

*Country visiting from shown if 8% or above*
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.
Segment 3 - Explorers

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

### Demographics

**Gender**
- 53% Male
- 47% Female

**Average age profile**
- 18-24: 17%
- 25-34: 20%
- 35-44: 17%
- 45-54: 18%
- 55+: 28%

### Marital status / children

**Marital status**
- Married / living with partner: 69%
- Single / divorced / widowed: 31%

**Number of children**
- 0 children: 64%
- 1 child: 16%
- 2 children: 16%
- 3 or more children: 2%
- Prefer not to say: 2%

### Disability

- No disability: 86%
- Disability: 13%
  - Asthma – 4%
  - Mobility impairment, arthritis – 3% each
  - Serious long term illness, visual impairment – 2% each
  - Prefer not to say

### Country

**Country visiting from**
- UK: 25%
- Italy: 13%
- Spain: 12%
- Germany: 10%
- USA: 10%
- France: 9%

Country visiting from shown if 8% or above.
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
  - Male: 57%
  - Female: 43%

Average age profile

- 18-24: 16%
- 25-34: 19%
- 35-44: 21%
- 45-54: 16%
- 55+: 28%

Marital status / children

- Marital status
  - Married / living with partner: 64%
  - Single / divorced / widowed: 36%

- Number of children
  - 0 children: 65%
  - 1 child: 19%
  - 2 children: 11%
  - 3 or more children: 2%
  - Prefer not to say: 2%

Disability

- No disability: 77%
- Disability: 21%
  - Mobility impairment – 6%
  - Asthma – 5%
  - Arthritis, serious long term illness – 4% each
  - Prefer not to say – 2%

Country visiting from

- Country visiting from shown if 8% or above
  - UK: 25%
  - Ireland: 17%
  - Spain: 10%
  - France: 8%
  - Italy: 8%
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.

### Demographics

**Gender**
- Male – 53%
- Female – 47%

**Average age profile**
- 18-24: 14%
- 25-34: 20%
- 35-44: 18%
- 45-54: 17%
- 55+: 30%

- Prefer not to say – 1%

### Marital status / children

**Marital status**
- Married / living with partner: 63%
- Single / divorced / widowed: 37%

**Number of children**
- 0 children: 69%
- 1 child: 14%
- 2 children: 11%
- 3 or more children: 4%
- Prefer not to say: 2%

### Disability

- No disability: 78%
- Disability: 20%
  - 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: 67%
- France: 5%
- Germany: 5%
- Australia: 4%
- Italy: 3%
- Spain: 3%
- Netherlands: 3%

**All respondents from UK**
- UK 5b: 15% have a disability
- International 5a: 23% have a disability
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**

- Gender: 55% female, 45% male
- Average age profile:
  - 16% 18-24
  - 28% 25-34
  - 28% 35-44
  - 14% 45-54
  - 15% 55+

**Marital status / children**

- Marital status:
  - 66% Married / living with partner
  - 33% Single / divorced / widowed
  - Prefer not to say: 1%

- Number of children:
  - 48% 0 children
  - 24% 1 child
  - 19% 2 children
  - 6% 3 or more children
  - Prefer not to say: 2%

**Disability**

- 80% No disability
- 17% Disability
  - Arthritis, asthma – 4% each
  - Hearing impairment, visual impairment, age related mobility difficulties, mental health condition – 3% each
  - Prefer not to say – 3%

**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%