

RESEARCH SUMMARY

Title	Understanding visitor ticketing
Objective	Understand visitors' awareness, usage and attitudes towards ticketing products and purchase channels
Date	May 2010
Methodology	356 face to face interviews with leisure visitors (219 UK, 137 overseas), 209 interviews with business visitors (105 UK, 104 overseas). 17 in-depth intercept interviews. Comparisons made against 2006 visitor ticketing study.

Key findings

- Overall, visitors' ticket choices are driven by convenience of purchase and peace of mind provided by the product. They are also less sensitive to cost.
- One Day Travelcard (ODTC) remains the single most used ticket for all visitor types. It is well established, with high awareness. It meets visitor needs well: simple to understand; easy to buy; once bought they can travel without thinking about payment (peace of mind). ODTC linked with National Rail ticket is simple and convenient for UK visitors.
- Oyster Pay As You Go (PAYG) is now strongly established among visitors. Awareness and use are significantly higher than in 2006, and share is mostly gained from ODTC. Satisfaction with use of Oyster PAYG is high.
- The PAYG proposition is appealing among non-users. However, many have less confidence in PAYG compared to ODTC: they don't know when PAYG will run out, and aren't confident in what to do when it does. These concerns limit PAYG take-up, especially for established (and satisfied) users of ODTC.
- On-system sales – particularly from ticket office – still dominate for visitors. Buying on-system is convenient. Many visitors also want advice / reassurance from staff, and are prepared to queue if necessary to get this.
- Visitors have low willingness to think about tickets before travelling, see little benefit in pre-purchasing, and have lower confidence in doing so. Pre-purchase on entry modes to London (e.g. air, rail) has better 'fit' with visitor needs than online purchase before travelling.
- Visitor Oyster card is gaining a foothold among visitors. However, its appeal and take up is limited mainly by the lower willingness to pre-purchase.

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