



Heart of London Business Alliance
The Business Improvement District

Heart of London 2009 Perception Survey

Introduction

Welcome to the third Heart of London Business Alliance Perception Survey.

Our biennial research provides vital feedback from those who visit the area and a baseline of data indicating where there has been improvement and where we need to realign resources.

The key priorities identified in the survey will be used in planning for 2010/11 to ensure we are prepared for the arrival of the 2012 Olympics, making the most of the opportunities the Games bring.

As well as providing an overview of why and when people visit the area, our main objective is to assess current opinion of the Heart of London.

Despite the economic downturn, the survey shows that not only are more people visiting the area with partners and families but that those visitors are now viewing the area as a destination. This may be a result of West End London's marketing campaign - 'shopping and entertainment, like nowhere else'.

The increased appeal of the area as a destination may also be a result of the continued improvements achieved, including Leicester Square's recent Purple Flag accolade, which demonstrates to visitors that the area is clean, safe, enjoyable and more accessible, particularly at night.

It is significant that visitors feel very safe here during the day, however, more police and better street lighting were rated as the most important safety improvements needed for the area at night. We will continue to target operations to deal with illegal street trading and anti-social behaviour.

The survey has identified that visitors think improved access, signage and directions would enhance the physical environment. We are confident that our work to ensure the Heart of London is included in the new Legible London Wayfinding Scheme will improve pedestrian navigation in the area in the future.

If you would like to discuss this Perception Survey in more detail or are interested in any areas not reported here, please contact me on 020 7839 3409 or by email at info@heartoflondonbid.co.uk



Sarah Porter
Chief Executive
Heart of London Business Alliance

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Key Findings

Heart of London Business Alliance has undertaken a survey of visitors to the area every two years since 2005. The results provide a vital benchmark as to how the area is being used and how it is being perceived.

A number of interesting trends have emerged from the 2009 data. These particularly reflect the changing economic climate and the positive developments that have been made in the area in recent years.

Of those surveyed the key findings were:

Visitor profile and usage

The majority of visitors to the Heart of London live in the UK and are under 40, although the number of visitors under 40 has decreased by 12% since 2007. The number of visitors aged between 40 and 59 has increased by 13%.

Of these visitors, almost half come to the area daily or weekly and are most likely to visit with a friend. The majority of visitors are domestic, which is a 20% increase on 2007. Half of overseas visitors are from Europe.

Shopping and sightseeing are the most popular reasons to visit the area, closely followed by business. The daytime and night-time attractions are equally strong with many visitors coming to enjoy both; this reflects the family appeal the area has, which was also identified in the 2005 and 2007 surveys. For international visitors, sightseeing is the main reason for visiting the area; for domestic visitors, the main attraction is entertainment.

Less people are just 'passing through', suggesting the area is now seen as more of a 'destination'. Almost one third of visitors have seen marketing campaigns for the West End.



Area perception

A high proportion of visitors rate their experience of the area as the same or better than other areas of London.

Transport

There has been an increase in the number of people using private hire vehicles to get home in the evening.

Visitor spend

There has been almost no change in the profile of spending since 2007. A third of visitors spend less than £20 when visiting the area and 40% spend between £20 and £50.

Overseas visitors spend more than domestic visitors, which may be due to the current exchange rates. 40-59 year olds spend the most money on their visit and the least money is spent in the area's nightclubs.

Street environment

Two issues were highlighted as having the worst impact on the area: street cleansing, which includes litter, rubbish, dirt, chewing gum and street urination and harassment from beggars, street traders and charity collectors.

Visitors think better street lighting, signage and pedestrian access would most improve the public realm.

Safety

The majority of visitors feel very safe during the day. Overseas visitors are more concerned with safety during the evening, domestic visitors are more concerned with safety at night. More than half of visitors said that the threat of terrorism had no effect on how often they visited the Heart of London. Greater police presence, better street lighting and more CCTV were rated as the most important safety improvements needed for the area. The visibility of City Guardians has decreased but overseas visitors feel they still make a positive contribution. More than half of visitors felt the police were doing a good job in the area.

A third of visitors felt anti-social behaviour was being dealt with.

The Feel

Piccadilly Circus and Leicester Square are major entertainment destinations within the West End. With their iconic statues, wealth of theatres and cinemas hosting high profile premieres, they have become busy meeting places and attractions in their own right.

The Heart of London attracts a diverse range of people, cultures and religions. More than 125 million people use the area every year, including a high volume of domestic and international visitors.

Visitor background and usage

Who visits the Heart of London area?

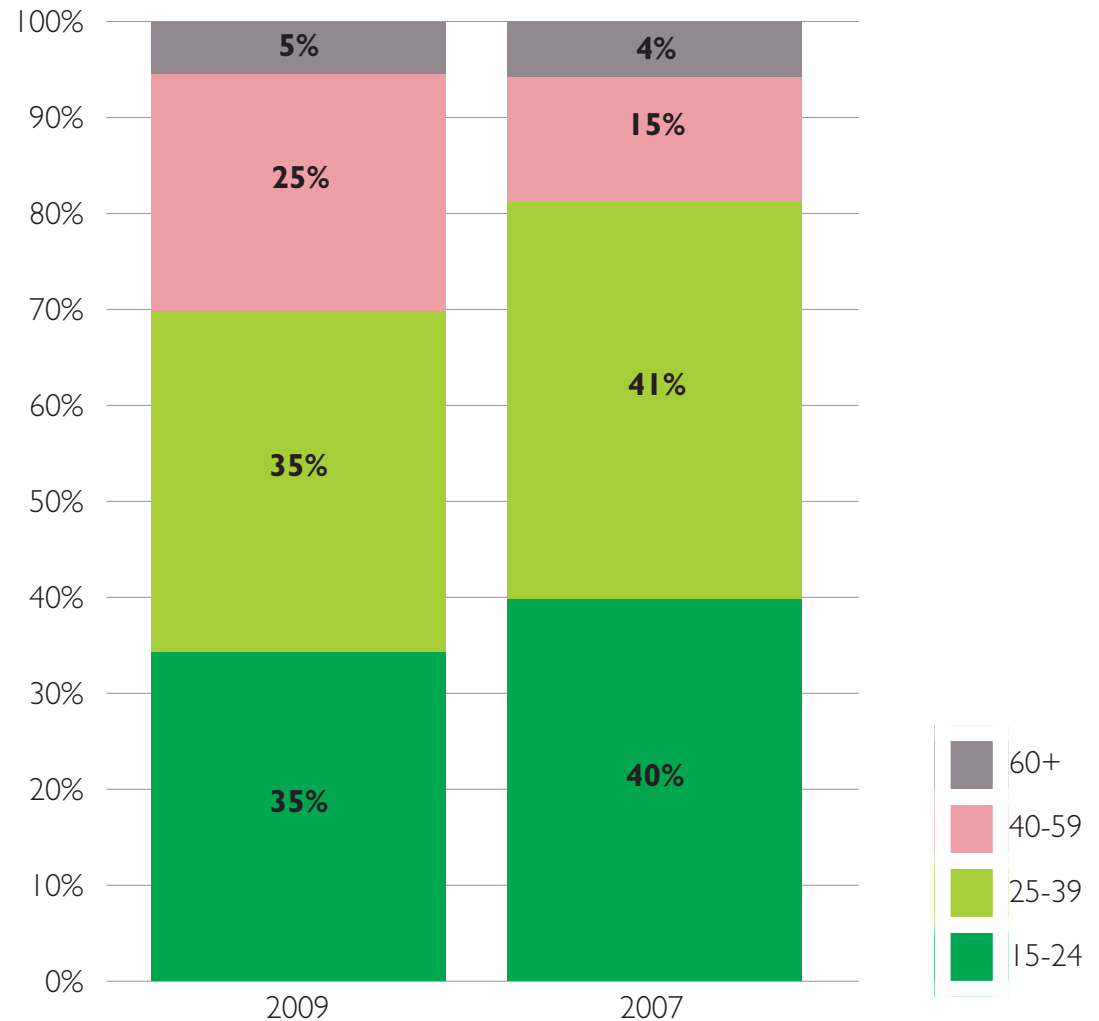
A high proportion of visitors to the Heart of London are under 40 (71%) and live in the UK (83%).

Changes in the age demographic of visitors between 2007 and 2009

The survey shows that the age profile of visitors to the Heart of London has changed significantly since 2007. The proportion of visitors aged under 40 has fallen from 83% in 2007 to 71% in 2009.

At the same time there has been an increase in older visitors: almost a quarter of visitors (24%) are now in the 40-59 age group, which is up from 13% in 2007. However, the proportion of visitors in the 60+ demographic has remained static at 5%, the same as in 2007.

The majority of visitors are still under 40 years old, but there has been a decrease in this age group since 2007. The 40-59 age group is up 13%



Visitor background and usage

Changes in balance between domestic vs. overseas visitors between 2005 and 2009

There have also been changes in the balance between domestic and overseas visitors. In 2007, 63% of those surveyed were UK residents whilst the remaining 37% were from overseas.

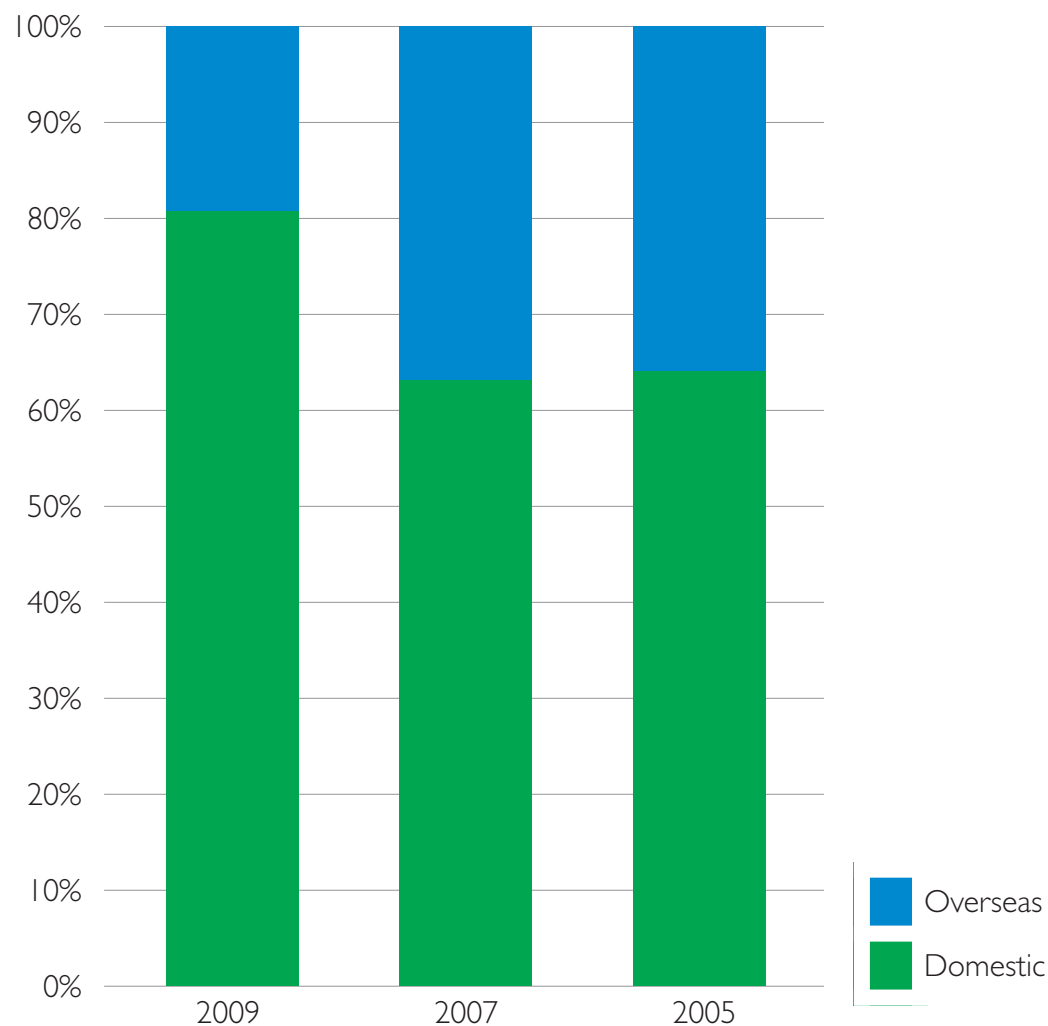
In 2009, there were fewer overseas visitors (just 17%) and more domestic visitors (83%) as a proportion. North and south London were particularly strongly represented in the group interviewed for this survey.

Half of overseas visitors are from Europe

Origin of visitors

Looking in more detail at the origin of visitors to the Heart of London in 2009, it is clear that of domestic visitors, Londoners – and in particular north and south Londoners – are in the majority. Outside of the UK the largest proportion of overseas visitors are from Europe or English speaking countries, only 8% of visitors interviewed were from the rest of the world (though this may reflect barriers to participation amongst non-English speakers.)

The majority of visitors are domestic, which is a 20% increase on 2007

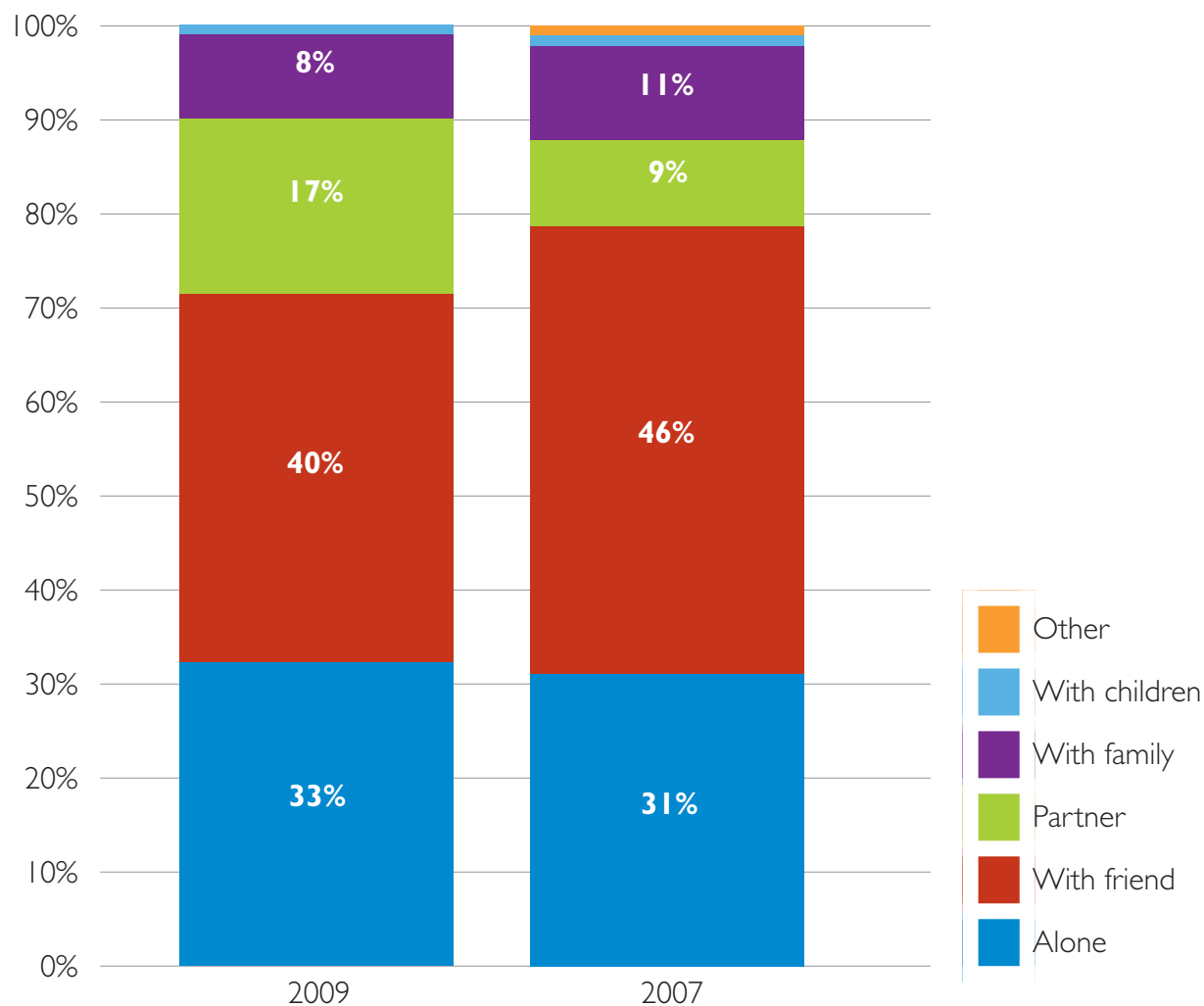


Visitor background and usage

Visitor cluster analysis. Changes between 2007 and 2009

Visitors to the area are most likely to visit the area with a friend (40%) or alone (33%). Overseas visitors are slightly more likely to be visiting with someone compared to domestic visitors. Comparing 2009 with 2007, there is a small increase (5%) in the number of people visiting with partners and families.

Visitors are most likely to visit with a friend

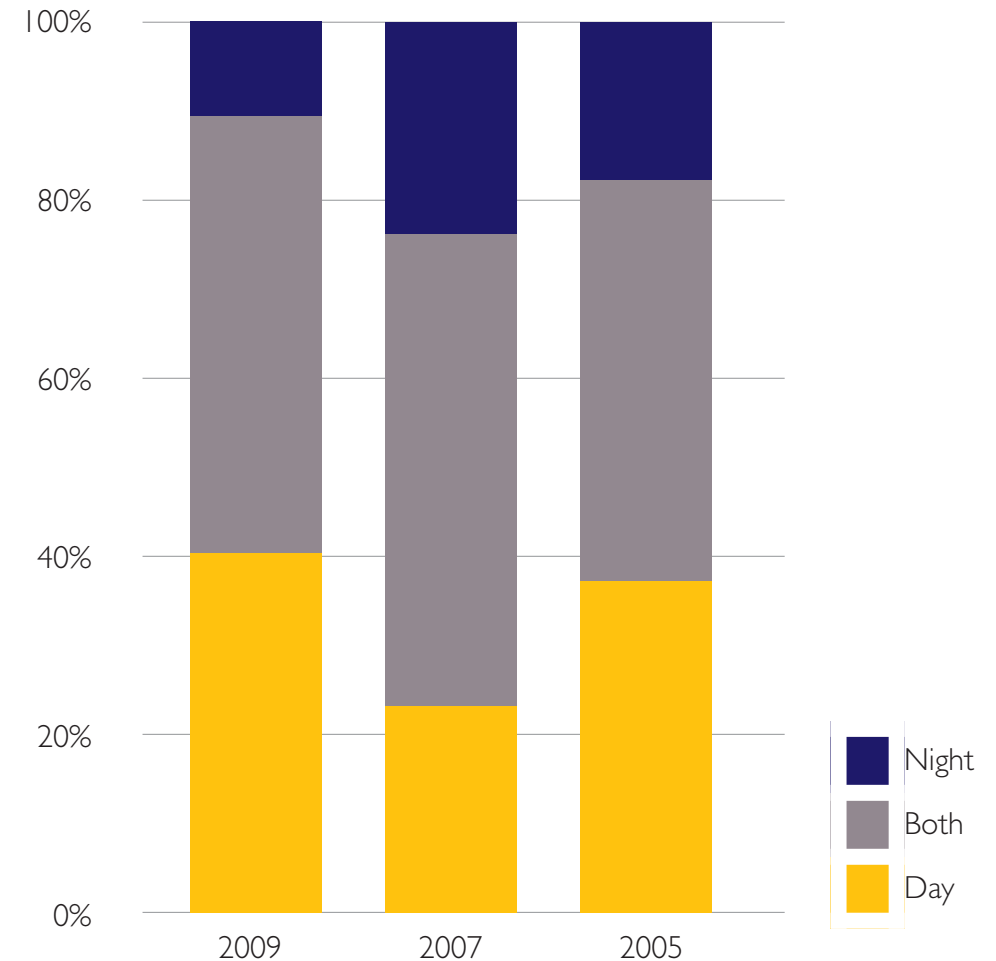
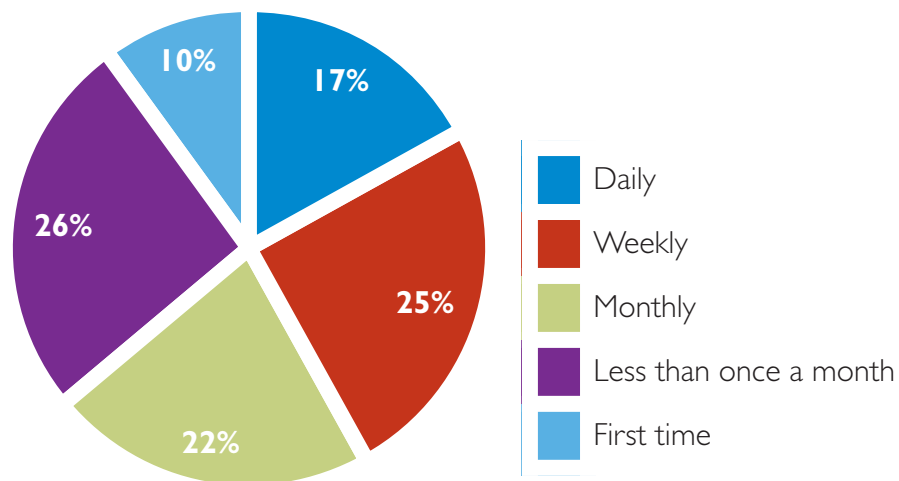


Visitor background and usage

Frequency and time of day of visits (2009)

Two in five of those interviewed were frequent visitors to the area (42% visit daily or weekly).

Unsurprisingly, domestic visitors visit more frequently (49% visit weekly or more often) than overseas visitors (just 12%). Interestingly, in the last year there has been a shift towards more daytime visits.

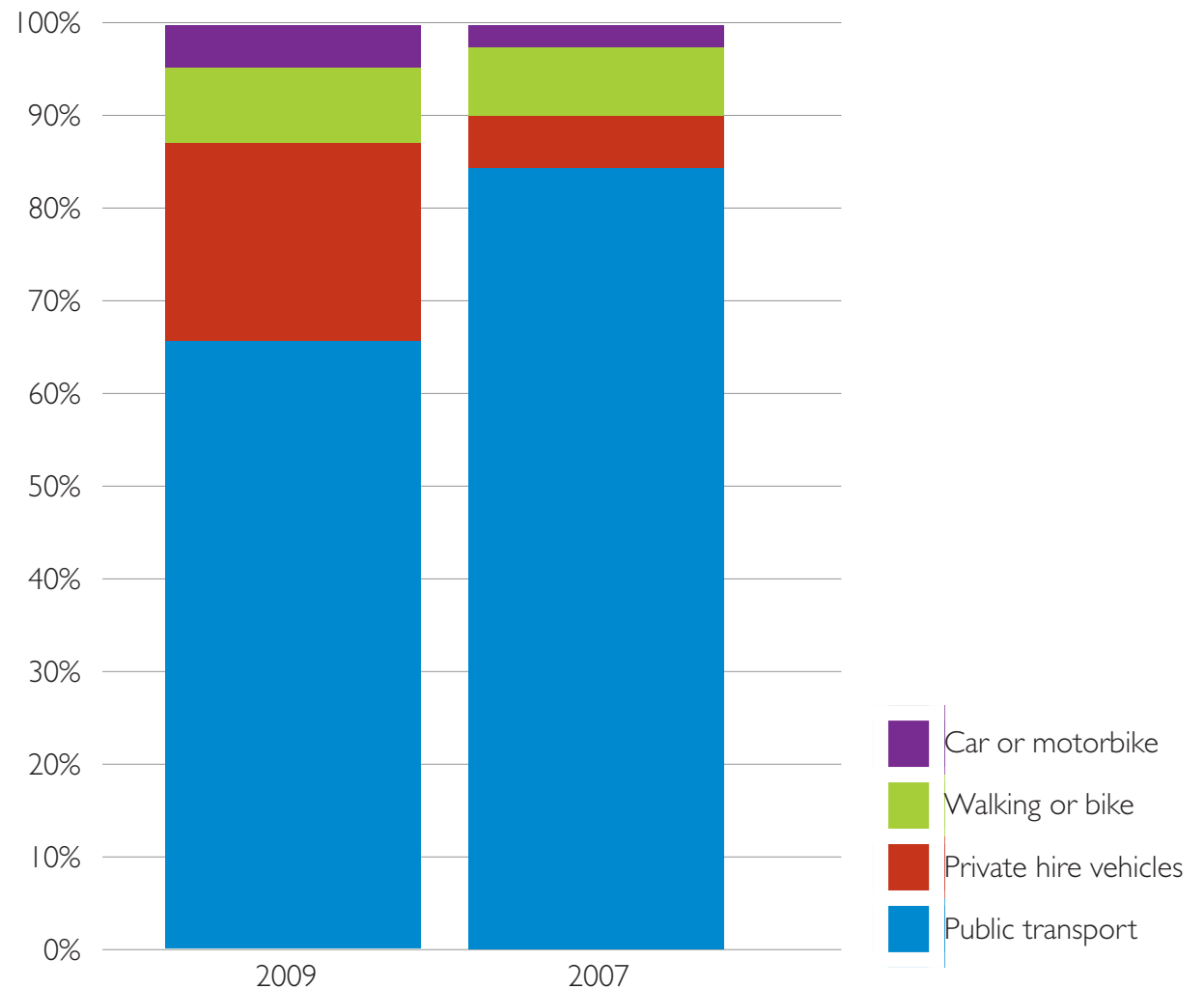


The Feel – visitor background and usage

How visitors get home from the Heart of London at the end of an evening

There has been an interesting shift in how people get home at the end of their night out since 2007. Whilst the number of people going home by private transport, by foot or bicycle has remained pretty much static there has been a big decrease in public transport usage (19%), and a very similar increase (16%) in the use of private hire vehicles (minicabs and taxis).

The use of public transport has decreased and the use of private hire vehicles has increased



The Experience

With iconic cinemas and theatres and more than 75 bars, cafés, restaurants and nightclubs, the Heart of London attracts sightseers, film enthusiasts and those looking to meet with friends for drinks.

The Heart of London experiences high footfall, with a large number of people visiting the area, working in the area and using the area as a thoroughfare. The main draw for overseas and short break visitors is sightseeing, shopping and entertainment.

Marketing initiatives and campaigns are used to attract visitors to the Heart of London area. These are delivered by the Heart of London Business Alliance through the West End Marketing Alliance. Why people visit and how they spend in the area is key data to drive the area marketing strategy.

Attractions, entertainment and marketing campaigns

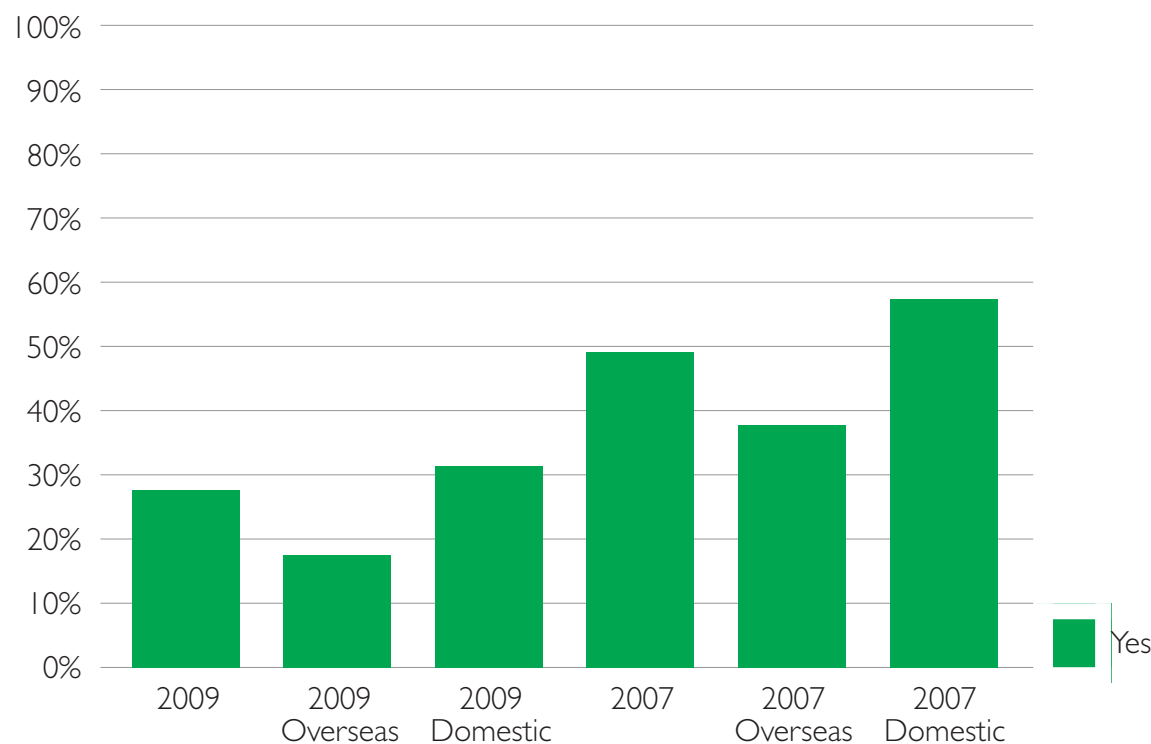
Changes in awareness of Heart of London promotions over time for domestic and overseas visitors

Why do they visit?

For international visitors, sightseeing is still the main reason they visit the area (37%), whilst for the domestic visitor the main attraction is entertainment (54%).

Promotional material plays a part in attracting visitors to the Heart of London. The 2009 survey showed under a third (28%) of visitors said they had seen marketing or promotional material originated by the West End, compared to half (50%) in 2007.

16% of overseas visitors said they had seen promotional material in 2009 compared to 31% of their UK counterparts. This same pattern was seen in 2007.



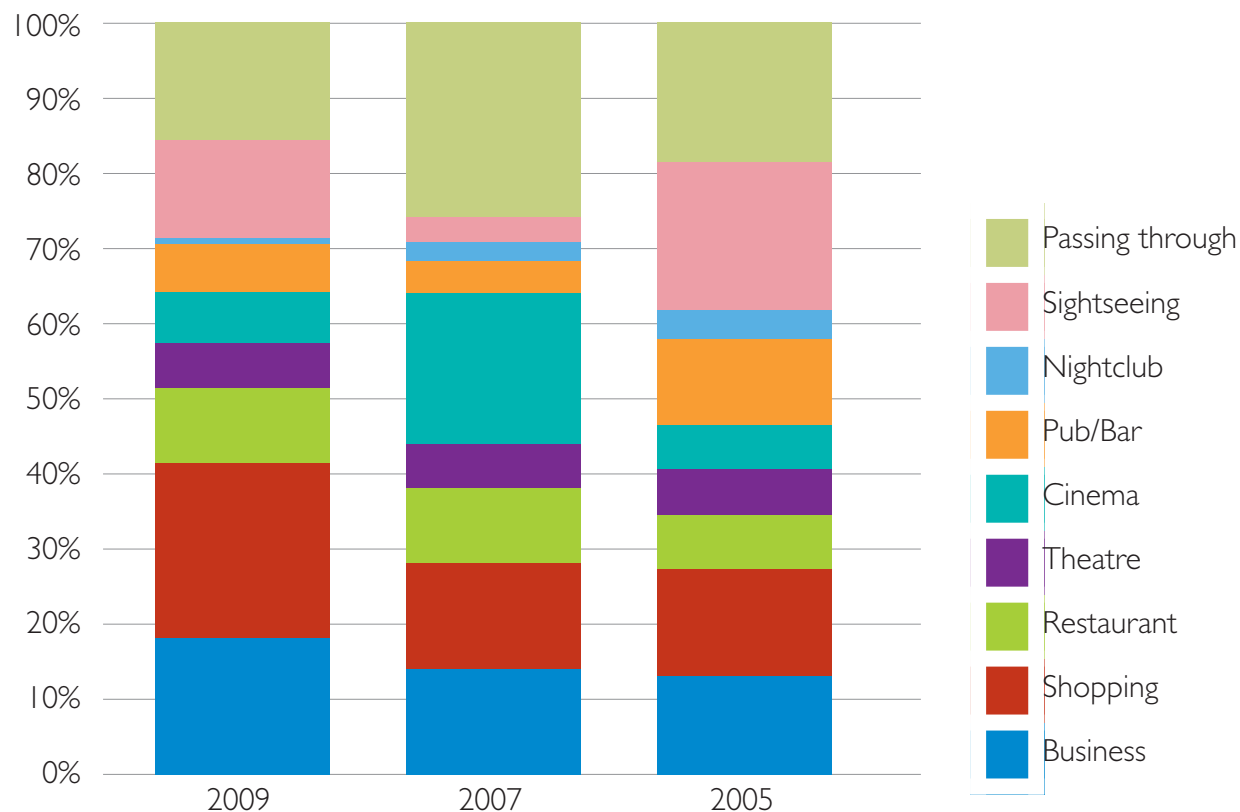
International visitors come to the area for sightseeing, domestic visitors for entertainment

Attractions, entertainment and marketing campaigns

Reason for visit, changes from 2005 to 2009

Another important question is why people are visiting the area. The main draws are sightseeing, shopping and business, with others just passing through. Overseas visitors tend to visit the area for sightseeing and shopping.

Reasons for visiting the Heart of London have changed since 2007. Most noticeably more people are sightseeing or shopping (together up 10%) and many fewer are visiting the cinemas (13% down). Interestingly, there are also fewer people just 'passing through' the area (down 11%), suggesting it is now more of a destination.



Fewer visitors are just passing through, seeing our area as the destination we position ourselves as

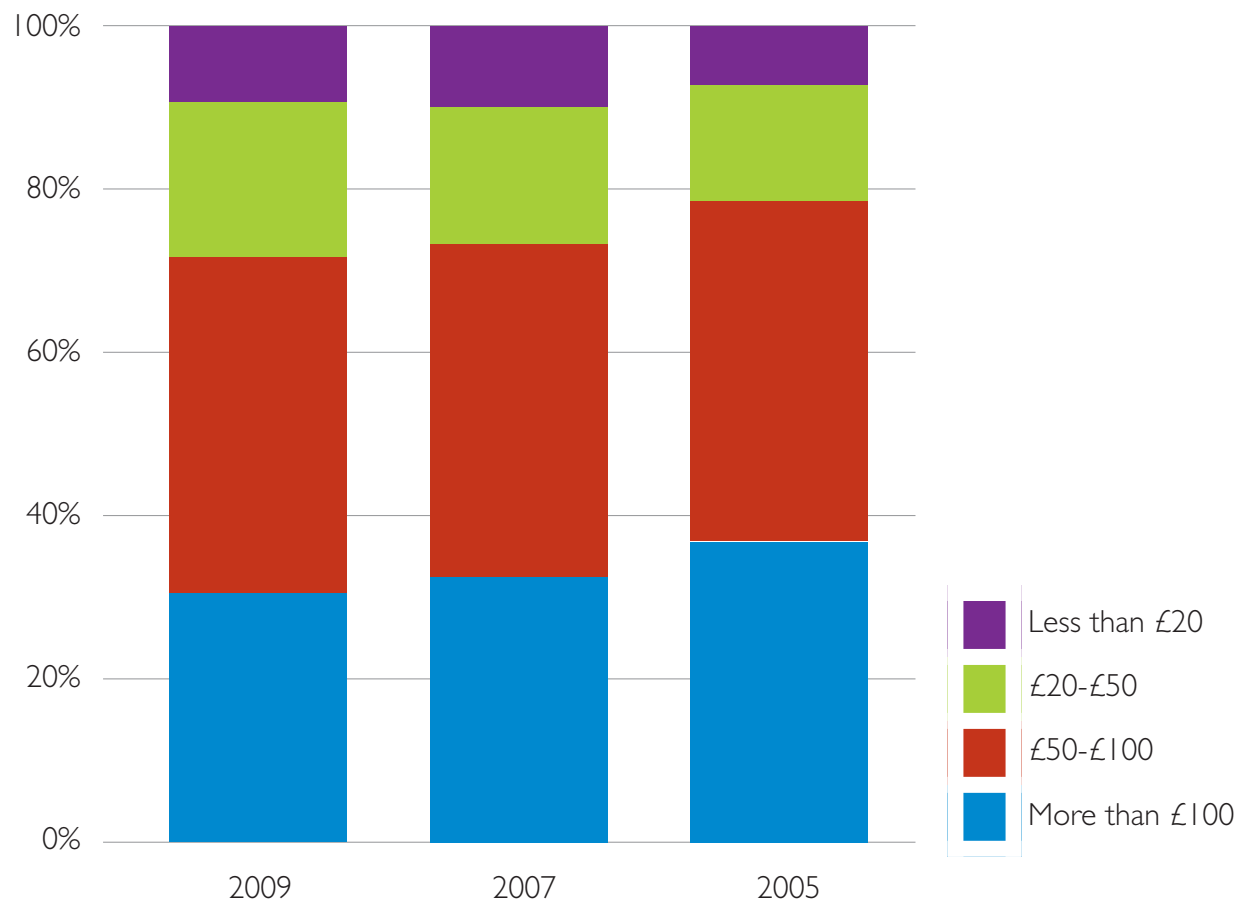
Attractions, entertainment and marketing campaigns

Changes in visitor spend

There has been almost no change in the profile of spending since 2007: in 2009 three quarters of visitors spent less than £50 and less than one in 10 spent more than £100.

Spend per visit from

Overseas visitors consistently spend more than domestic visitors (41% spend over £50 compared to just 19% of domestic visitors). Whilst the spending profile of domestic visitors has stayed fairly constant, overseas visitors spent more in 2009 than they did in 2007 (when only 31% spent over £50). This can be explained to some extent by changing exchange rates: in 2007 the pound was much stronger (worth about \$2 or €1.5 compared to about \$1.5 and €1.1 in 2009).



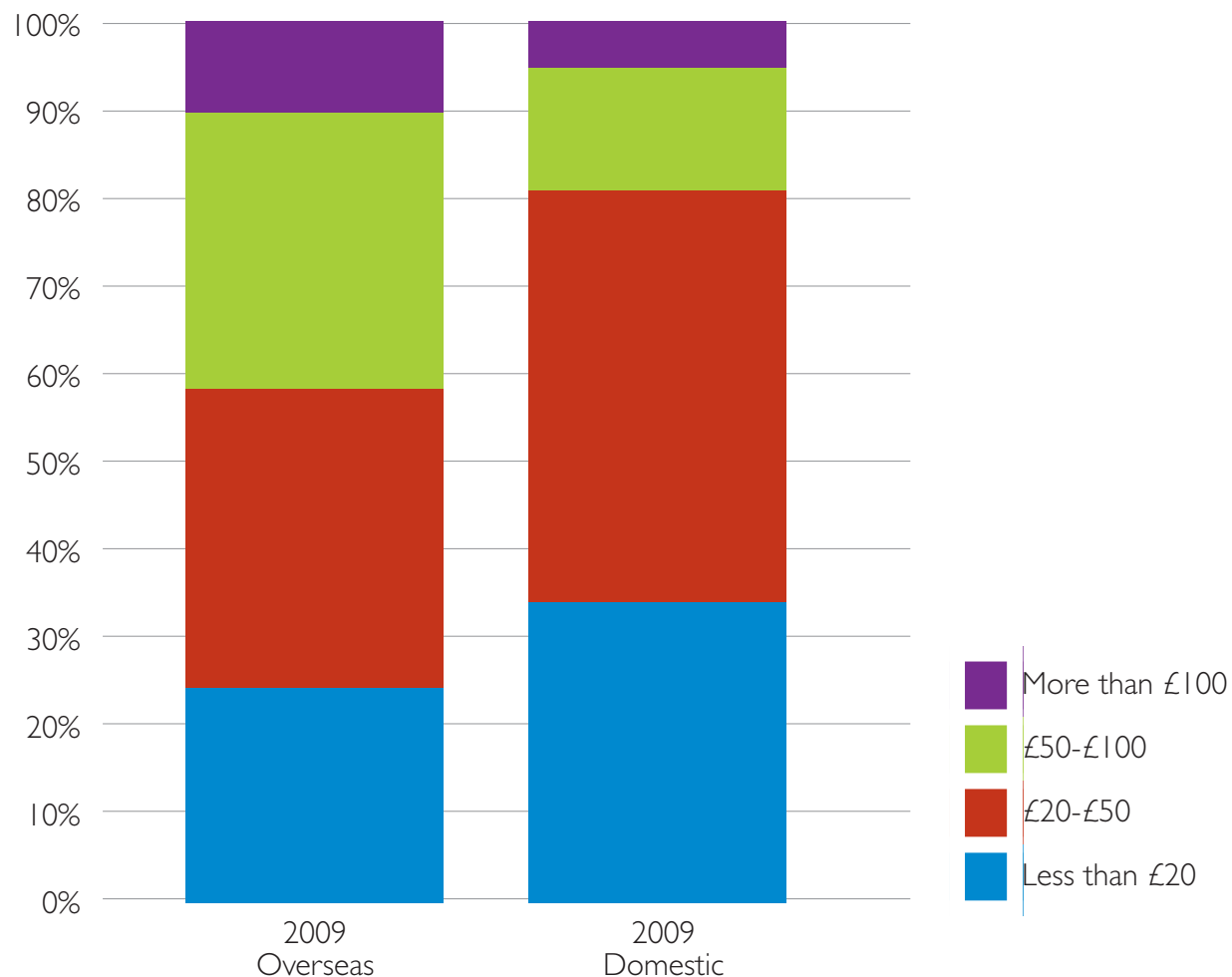
There is no real change in spending

Attractions, entertainment and marketing campaigns

Differences in spend between domestic and overseas visitors, 2009

Given the high proportion of people visiting the area for shopping or on business, it is in this area that the most money is being spent overall. Sightseers, theatre, restaurant, pub and bar goers are also significant spenders. This could be attributed to the restaurants, pubs and bars in the area now offering discounts through the WOW Privilege Card and other promotional activity to attract customers in the face of the recession. Additionally, with more people opting to spend their holidays at home rather than abroad, visitors are attracted to the assortment of entertainment activities on offer.

Overseas visitors spend more than domestic visitors

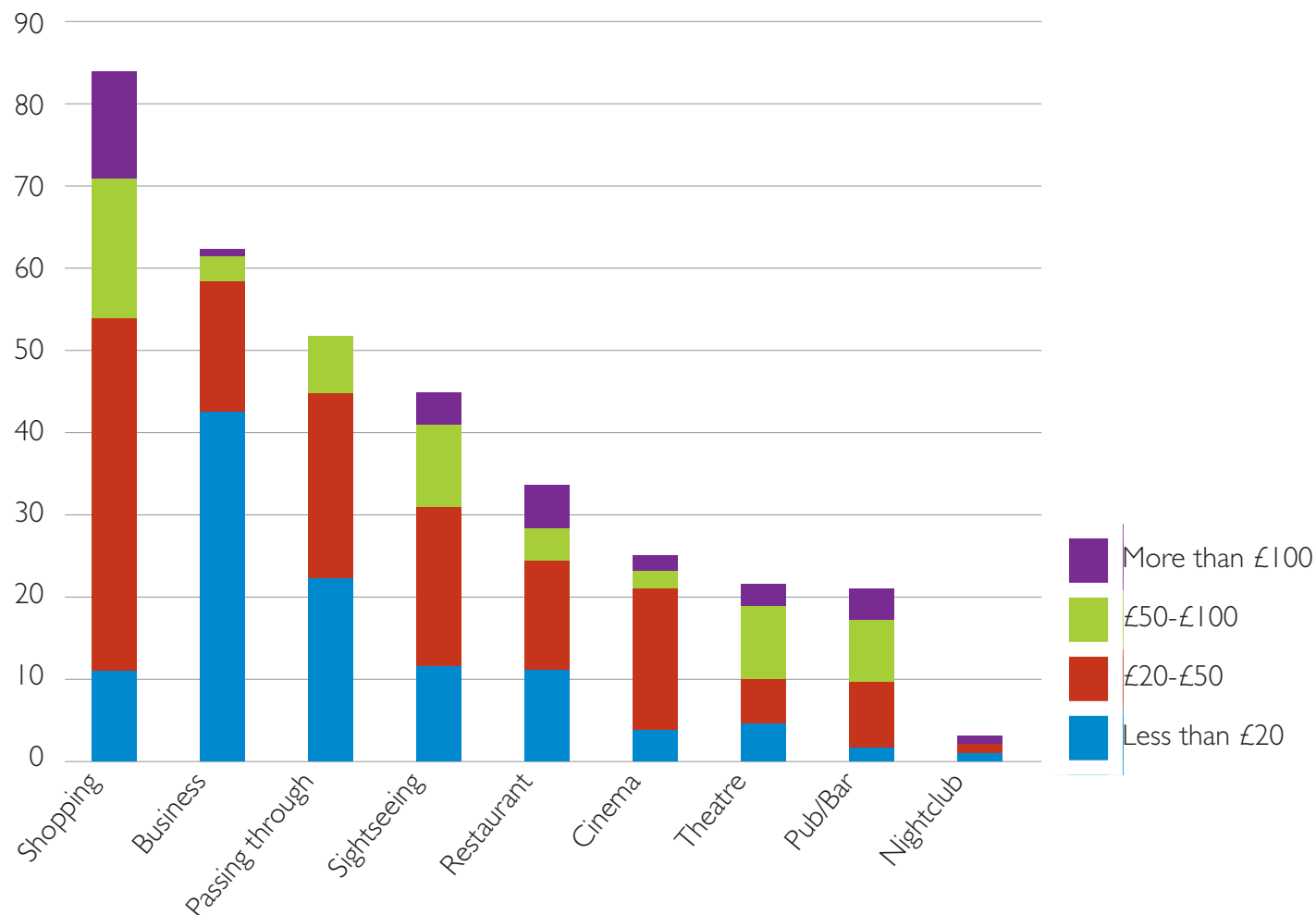


Attractions, entertainment and marketing campaigns

Spend by reason for visit (2009)

The 40-59 age group spend the most money, closely followed by the 25-39 year olds (10% of whom spend over £100). Visitors to the night time economy are more likely to spend over £50 (27%) than those who visit during the day (20%).

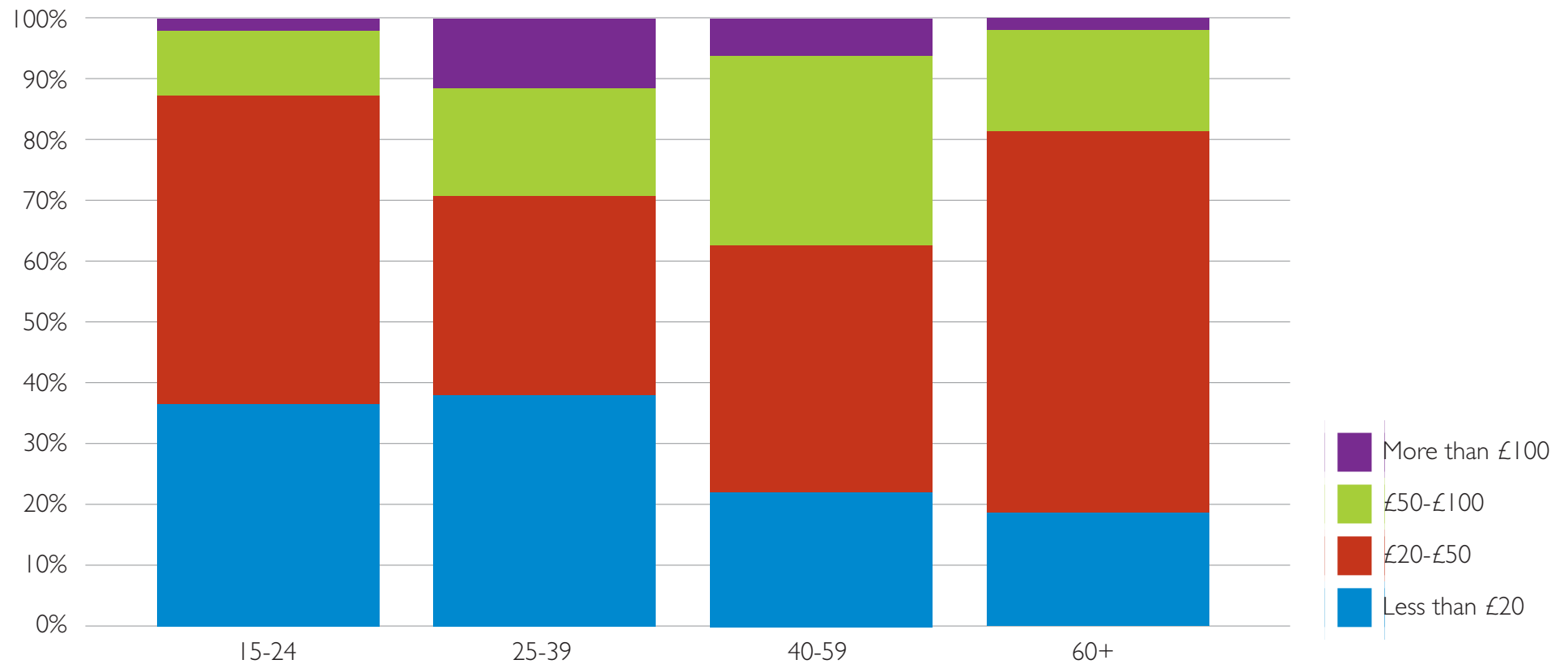
Night time visitors spend more than day time visitors



The Experience – attractions, entertainment and marketing campaigns

Spend by age group (2009)

40-59 year olds spend the most



The Look and Feel

Heart of London Business Alliance deliver services which keep the area clean, safe and welcoming and work in partnership on initiatives to reduce anti-social behaviour.

Almost all visitors to the area feel very safe during the day (98%) but this sense of security lessens as it gets dark. The majority of visitors (58%) felt the police were doing a good job in the area, with just 4% unsatisfied.

Following the reallocation of funding and reduced number of City Guardians on the streets since 2007, there was a decrease in the number of sightings of City Guardians. Visitors still say they would like to see more City Guardians, as well as more police.

The visibility of City Guardians has decreased

There is a level of uncertainty concerning visitors' perception of the police and the local Council's ability to deal with crime and anti-social behavioural issues.

The majority of visitors (85%) said that the threat of terrorism had no effect on how often they visited the Heart of London.

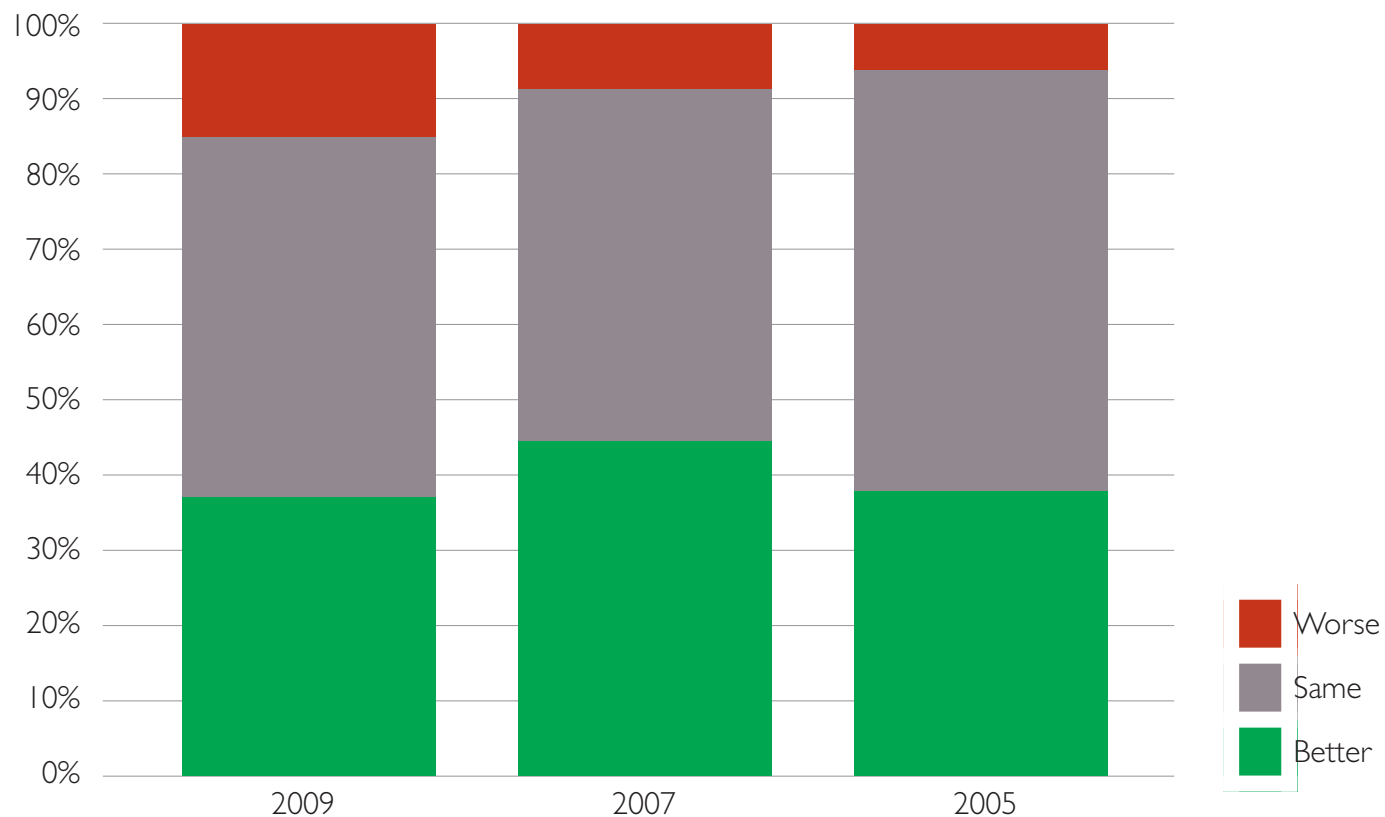
*Almost all day visitors feel very safe.
The majority of visitors feel the police
are doing a good job*

Area appearance and safety

Changes in perceptions of the area, 2005 to 2009

When asked to compare Piccadilly Circus and Leicester Square to other parts of London, the majority of visitors said that the Heart of London was the same or better in terms of quality. Although clearly positive, comparisons in 2007 were very slightly more favourable (about 6% more said it was the same or better than other areas).

The threat of terrorism has no effect on how often people visit

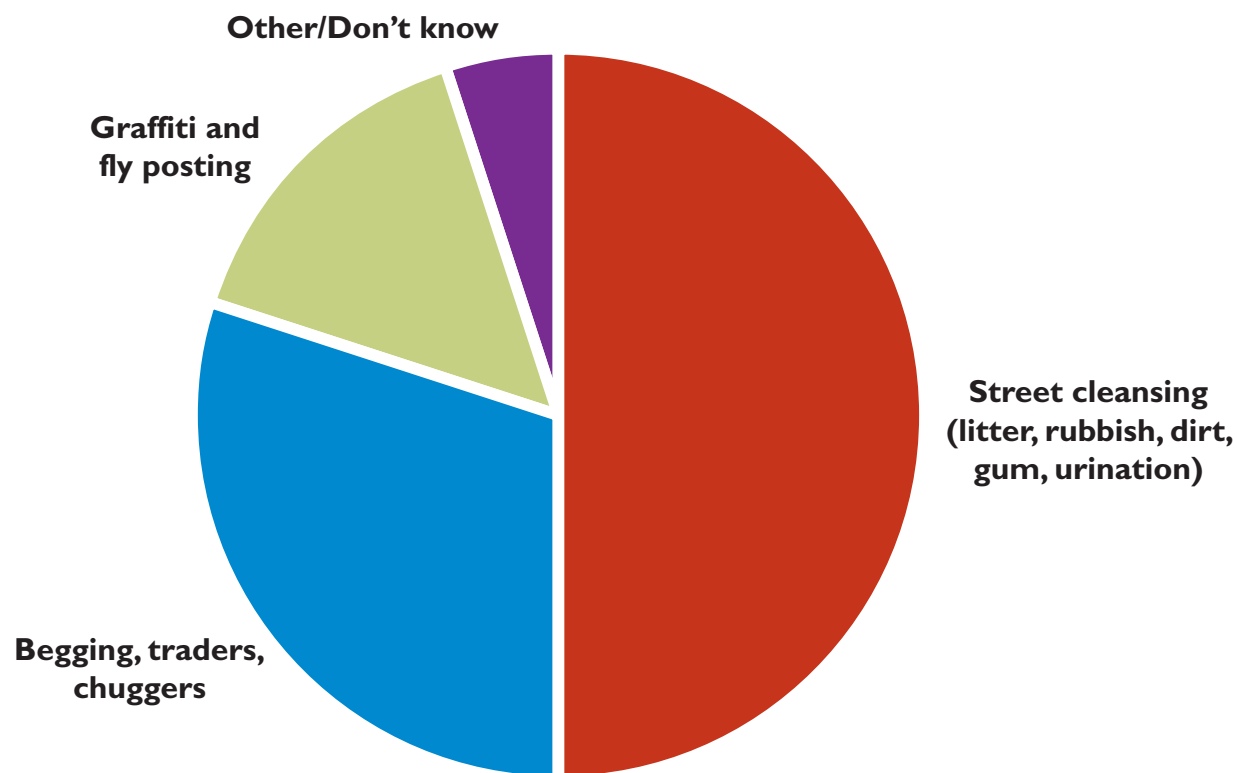


Area appearance and safety

Area issues (2009)

Visitors surveyed were asked which issues had a negative impact on their perceptions of the area. Two issues came out strongly: street cleaning (which includes litter, rubbish, dirt, gum and street urination) and harassment from beggars, traders and charity collectors.

The majority of visitors feel the area is the same or better than other areas in terms of quality



Area appearance and safety

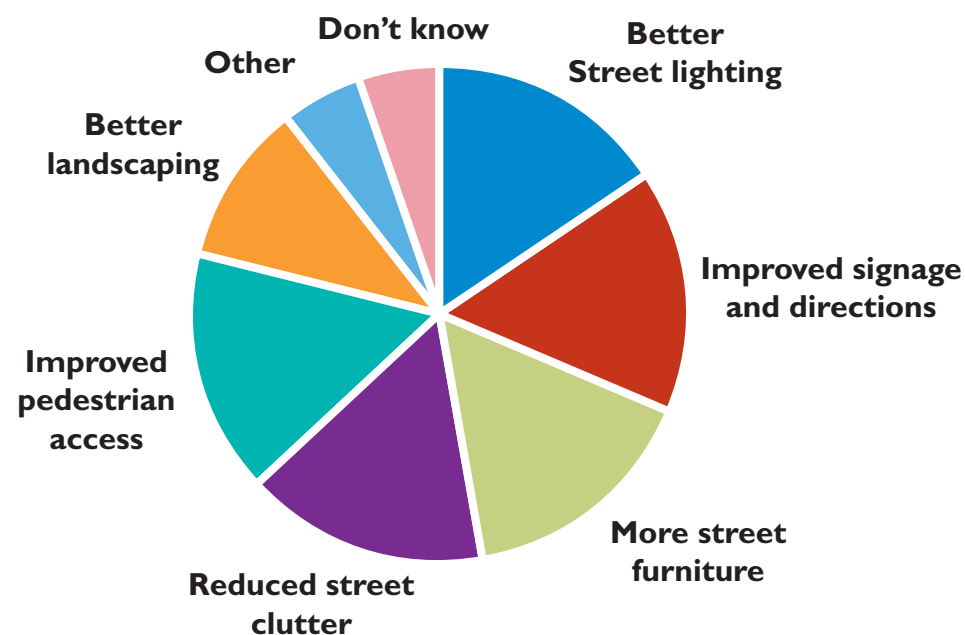
How the area could be improved

Maintaining the quality of the physical environment and stopping visitors from being 'harassed' are areas identified for improvement. In the long term, it is also interesting to note the improvements and investments visitors are expecting. Here the survey is not conclusive, with no single issue dominant.

Analysing the results, the same number of people said they would like to see more street furniture, as would like to see street clutter reduced. These two polarised opinions are mutually exclusive, so one conclusion would be that the amount of street furniture is approximately correct. This would then leave street lighting, signage and access as the main areas for improvement.

Improvements that would most enhance the Heart of London area

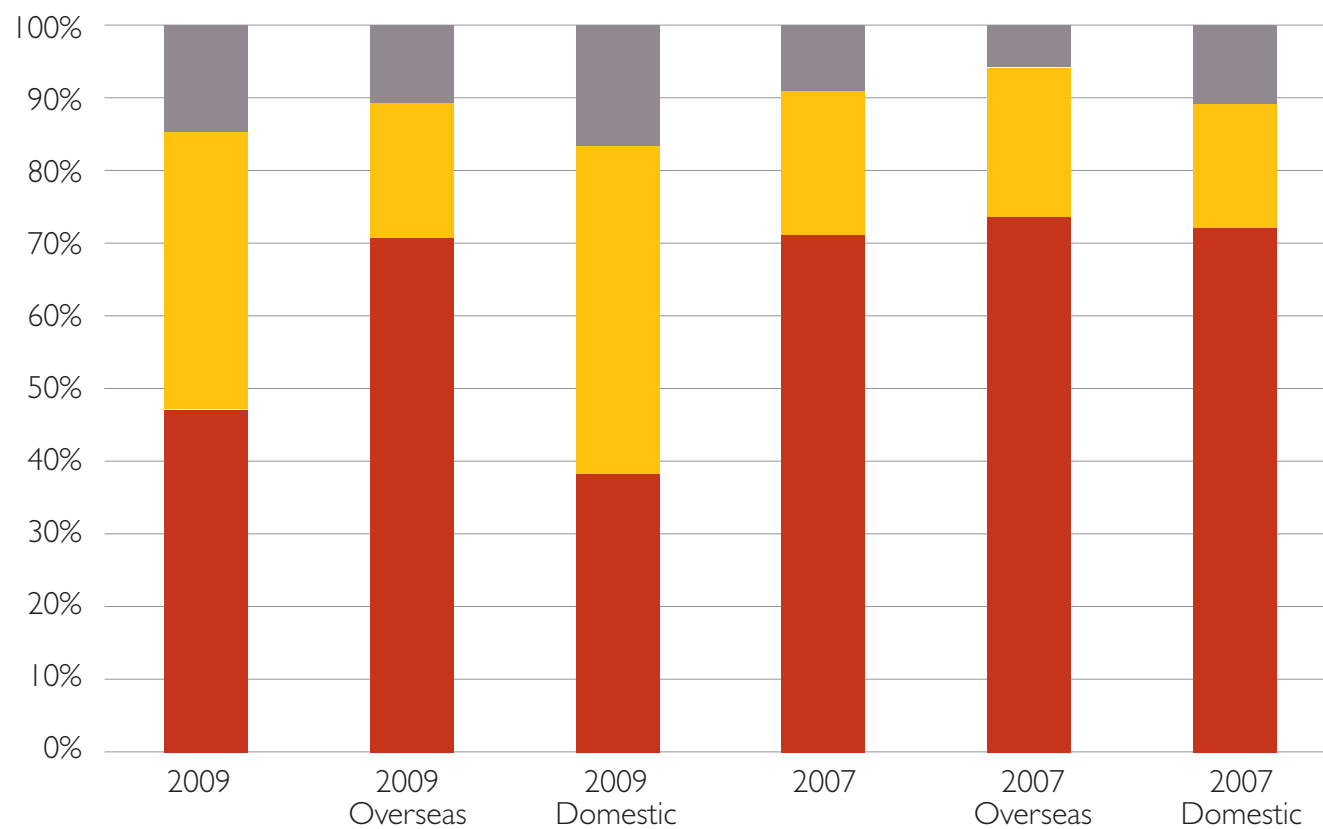
The survey indicates an overall decrease in how important visitors to the area think recycling facilities are. This is mostly due to a change in perception amongst domestic visitors: 72% said recycling facilities were very important in 2007 compared to just 39% in 2009. Overseas visitors remain just as concerned as they did in 2007.



Street cleaning and harassment are the two main issues. Street lighting, signage and improved pedestrian access are areas for improvement

Area appearance and safety

Changing views on the importance of on street recycling bins to domestic and overseas visitors between 2007 and 2009



Domestic visitors in 2009 significantly downgraded the priority of on street recycling



Area appearance and safety

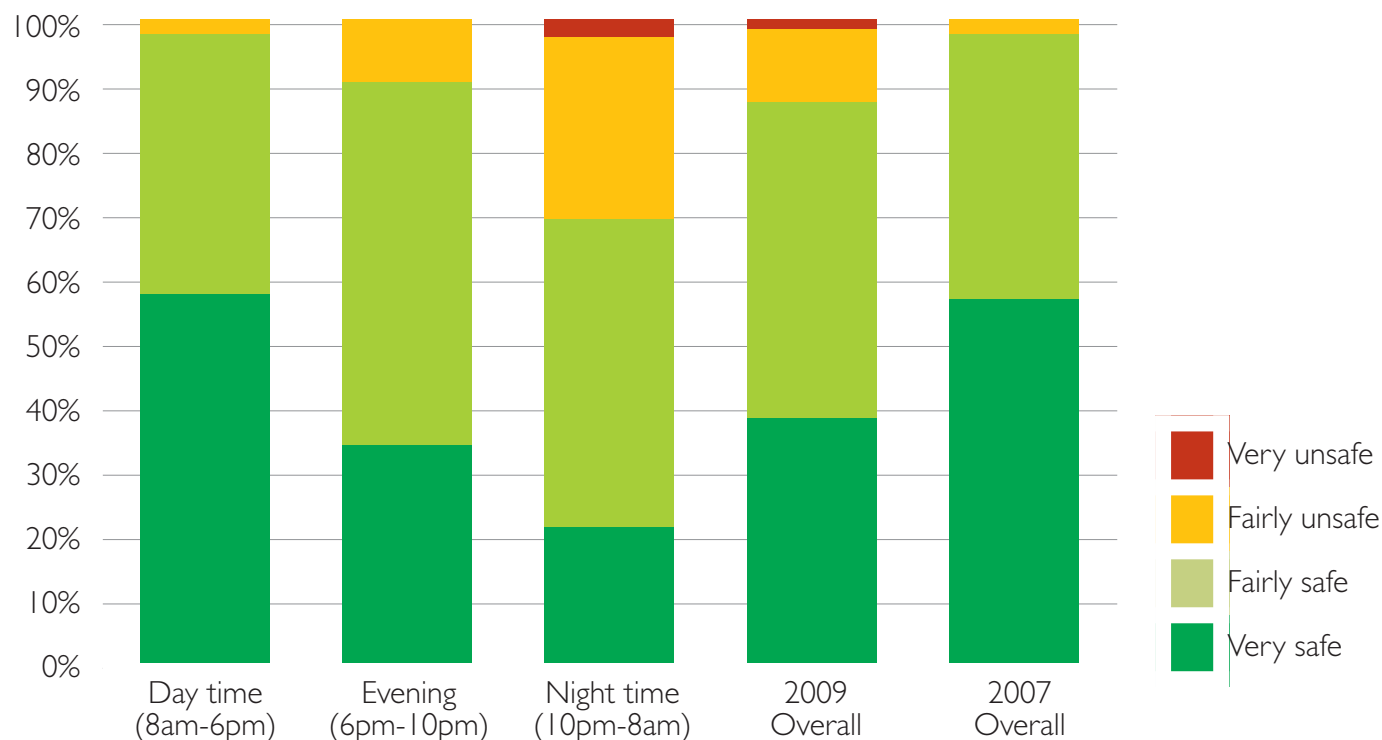
Visitors' perceptions of safety

Visitors' perceptions of safety alter at different times of the day. Both UK and overseas visitors feel safe during the daytime (98%). Whilst both groups feel less safe as it grows dark, there is an interesting difference: domestic visitors are much less worried about safety in the evening than overseas visitors, but this reverses at night. This may be associated with a higher awareness of potential night-time safety issues amongst domestic visitors.

Differences in the questionnaire methodology in 2007 means that a direct comparison with 2009 is not easy; however the diagram to the right provides a rough analysis. The figures suggest that in 2009 people did feel slightly less safe than they did in 2007.

Differences in perception of safety at different times of day 2007 to 2009

Significantly, fears over the threat of terrorism remains unchanged from 2007 with only 7% of respondents claiming that it had effect on them.



The overwhelming majority of visitors feel safe during the day

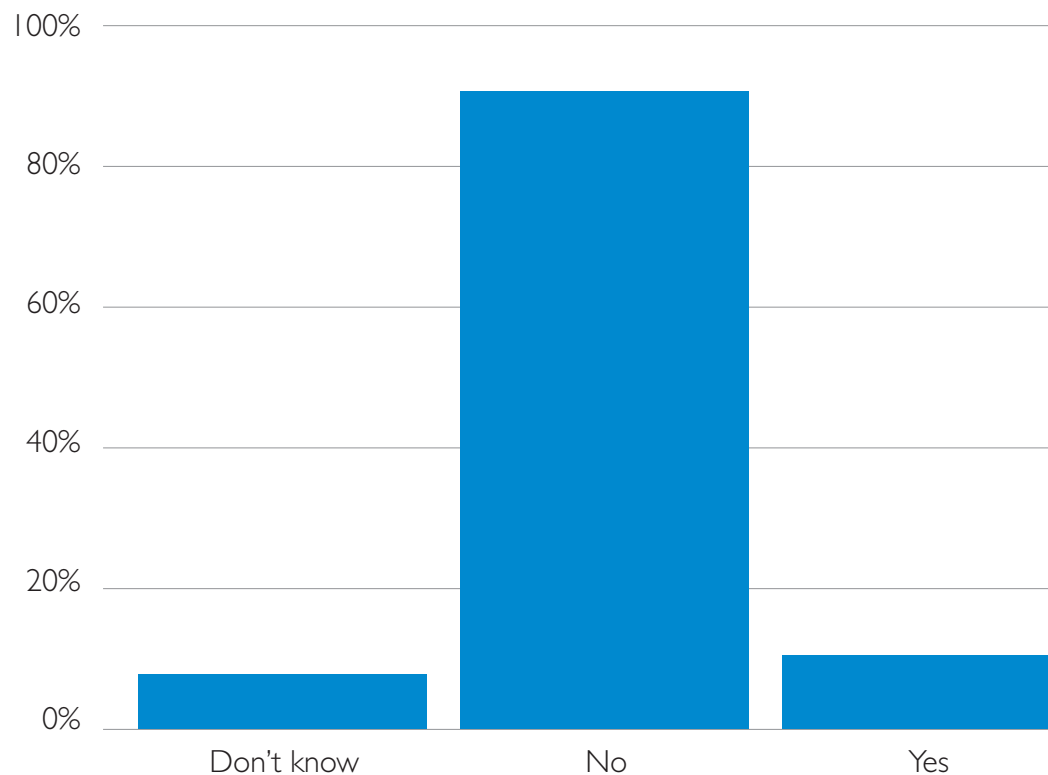
Area appearance and safety

The impact of the threat of terrorism on how often visitors come to the Heart of London area (2009)

Most people are happy with the job that the police are doing with just 4% of people unsatisfied. Overseas visitors are more likely to think that the police are doing a good job than domestic visitors.

Visitors were also asked about the specific issue of how well the police and the Council were tackling anti-social behaviour. On this specific issue about a third of visitors (36%) thought that the police were 'dealing with the crime and anti-social behaviour issues that matter in this local area' – compared to 21% saying they were not.

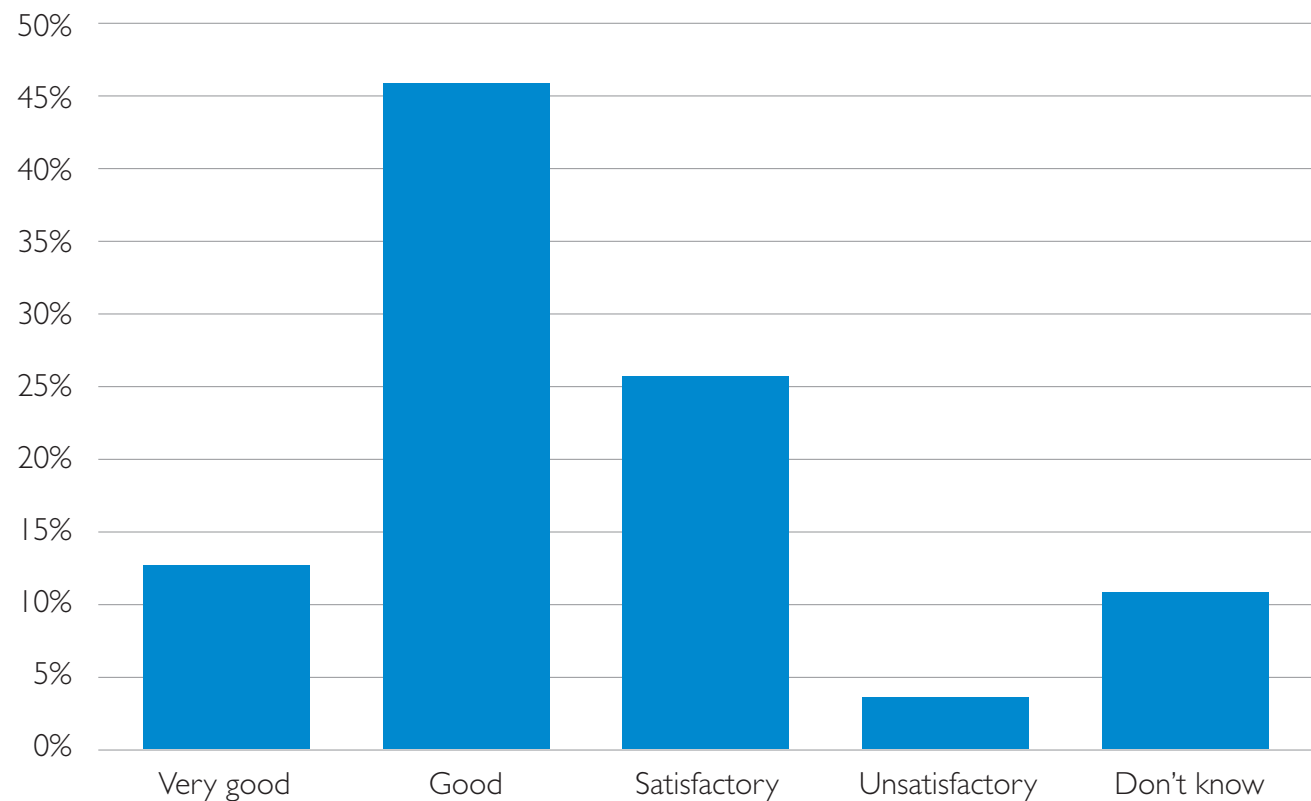
It is worth noting that 43% say they 'don't know' – this is not surprising and perhaps reflects the number of people who are tourists or are 'passing through'.



Most people are happy with the job that the police are doing

Area appearance and safety

Police satisfaction levels in 2009



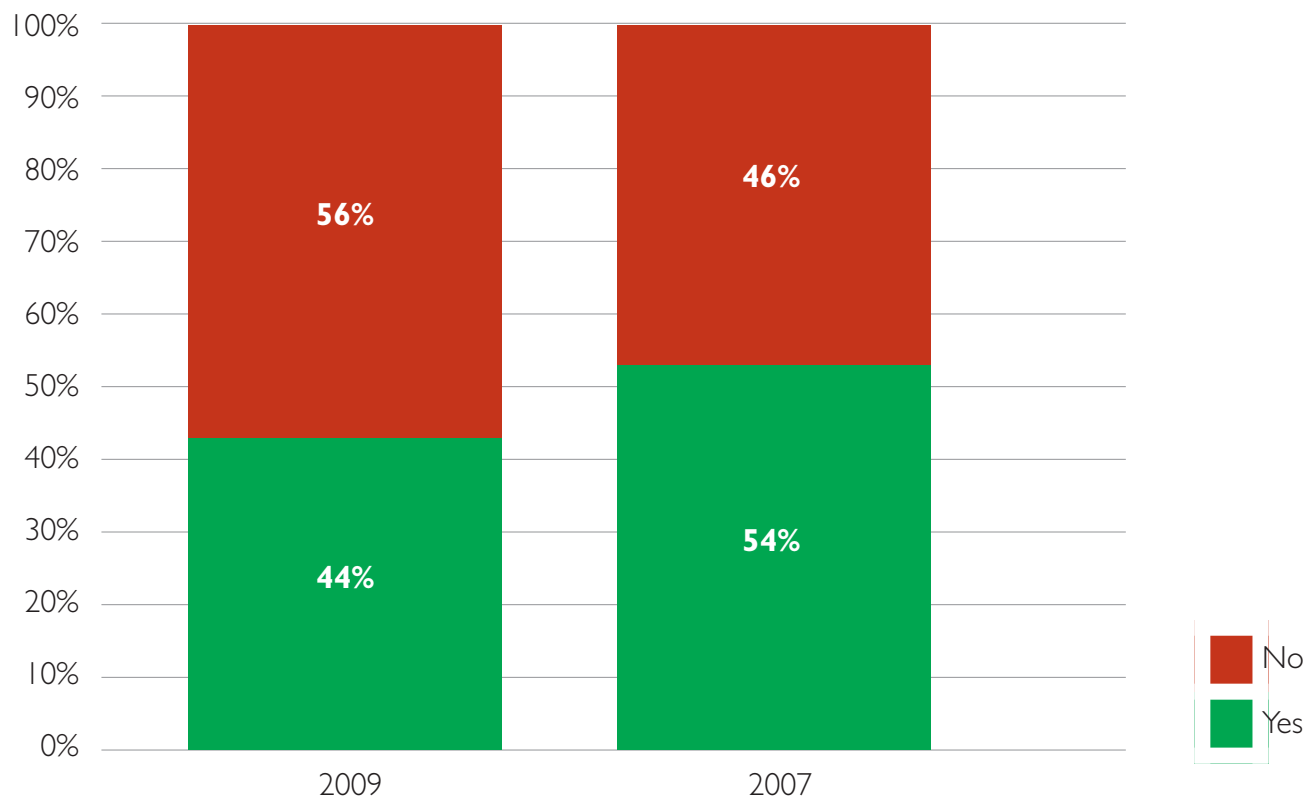
Area appearance and safety

Sightings of City Guardians, 2007 to 2009

Overseas visitors are more likely to think that City Guardians make a positive contribution to the area than domestic visitors

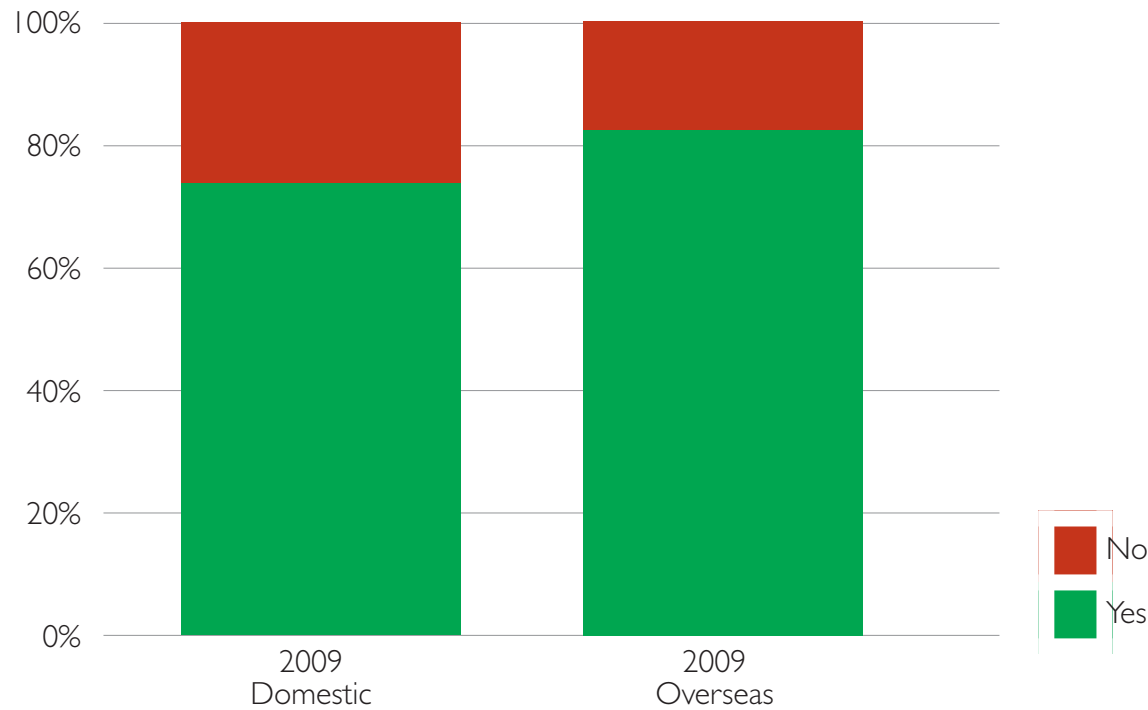
At the same time, however, there has been a drop in awareness of City Guardians since 2007: 10% fewer people saw them in 2009.

There is a reduced awareness of City Guardians. Overseas visitors feel City Guardians make a positive contribution



Area appearance and safety

**Do City Guardian's make a positive addition to the area?
Domestic vs. Overseas visitors.**



*Overseas visitors feel
City Guardians make
a positive contribution*

The Look and Feel – area appearance and safety

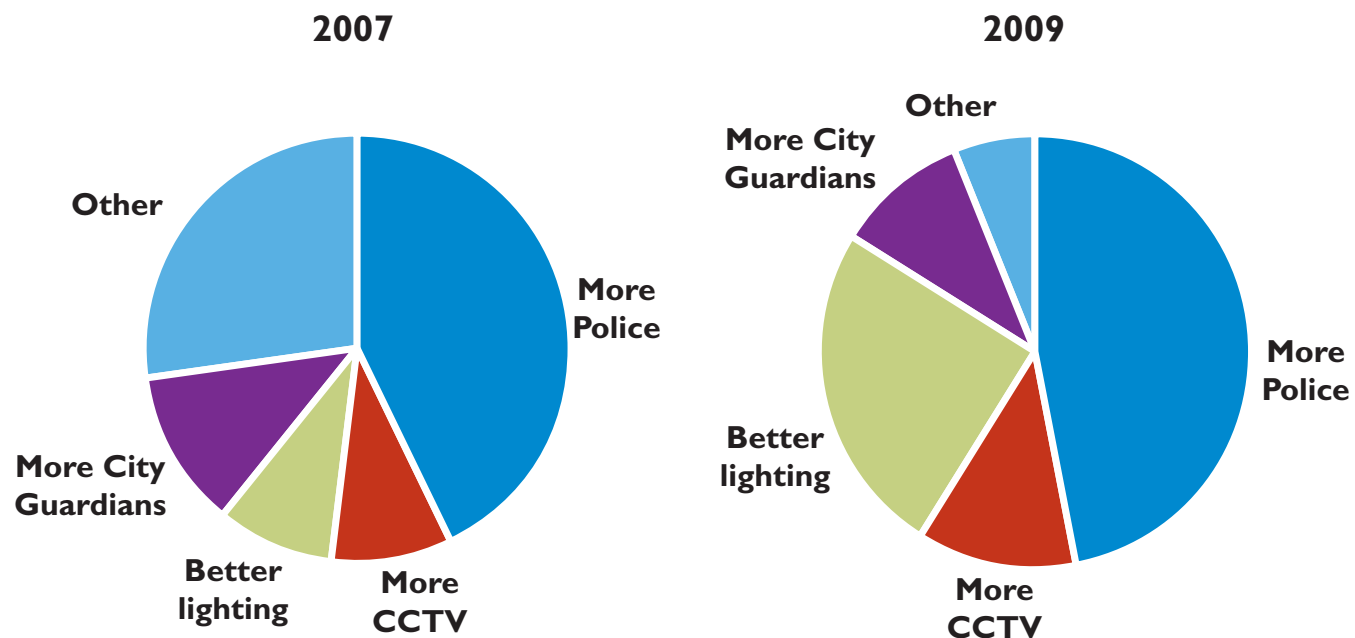
Recommended safety improvements

Visitors were asked what kind of improvements would make the area feel safer. Given that they had just been asked about how safe they felt at different times of day and tended to feel less safe at night, it is probably a fair assumption these answers were particularly relevant to the night-time environment.

The response was that 'more police' would make the greatest difference, closely followed by better lighting and CCTV. This is in line with the evidence that overall visitors feel less safe in 2009 than they did two years ago.

Change in perceptions of what would make the area feel safer, 2007 to 2009

It is believed greater police presence, better lighting and increased CCTV at night would assist safety improvements



Methodology

The data collection was conducted by an independent research team from the Geography Department of College London University, ranked in the top five in the world. A total of 300 interviews were conducted with visitors to the Heart of London area. The interviews took place on 19th October 2009. 60 surveyors interviewed people at 17 sampling points across the area.

Respondents were randomly selected with no bias toward race, age, ethnicity or country of origin.