

Heart of London Business Alliance

# Perception Survey 2005

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Heart of London Business Improvement District



FROM CIRCUS TO SQUARE  
A WORLD CLASS DESTINATION



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Dear Colleague,

Welcome to the first Heart of London visitor and user perception survey. As the Heart of London Business Alliance we agreed to establish clear criteria by which the Business Improvement District's (BID) successes could be measured. Such criteria must be relevant, meaningful, measurable and replicable – creating a strong benchmark for our future activity.

Clearly a key indicator is impact of specific initiatives and visitor and user perception of the BID area. We designed, developed and commissioned this important piece of research to meet this need. Over the following pages we outline the outcomes of this research which we hope will help us to understand better the opinions, needs and views of users of the Heart of London area.

The survey itself took place over 10 days in July and August. Our independent research team of five surveyors took 542 random interviews over that period with a mix of local users and tourists visiting the area during both the daytime and evening. This has delivered for us some of the most comprehensive data on local views to date.

We sought to understand why and when people visit the area; how much they spend; how they perceive safety and cleanliness; how they travel home late at night; and what they think of the offer to customers in the area. Specifically we looked at whether people recognise the Heart of London Clean Team and City Guardians, established during the first term of the BID, and what they think of them.

Leicester Square and the wider BID area are key visitor attractions in central London. As well as delivering improvements for the area and tackling key issues, the Alliance's remit is to promote the area more widely. Heart of London is the key umbrella brand, and understanding of the brand and its wider penetration into the user and visitor market was also assessed by the survey.

If you would like to discuss this report in more detail or are interested in any specific comparisons not reported here, please contact me by phone on 020 7434 9396, or by e-mail at [info@heartoflondon.info](mailto:info@heartoflondon.info)

Yours sincerely,

A handwritten signature in blue ink, appearing to be 'S. Porter', with a small blue dot to the right of the signature.

Sarah Porter  
Chief Executive

The Heart of London is a busy place. Coventry Street, with over half a million visitors every week, is the busiest street in the UK, whilst approximately 245,000 people visit Leicester Square every day. The research indicates that 38 per cent of these visitors rated the Heart of London as better than other areas that they had visited.

Most visitors were either young people (38 per cent aged 15 to 24) or 'middle youth' (44 per cent are 25 to 39) and nearly half visit the area either weekly or daily (49 per cent).

For overseas visitors the single biggest reason for visiting the area is sightseeing (35 per cent) whilst domestic visitors were most likely to be meeting someone (30 per cent). Leisure was also a major attraction with visits to cinemas, nightclubs, bars, restaurants and theatres adding up to four in ten visits to the area (39 per cent).

When people visit the area they also tend to spend money there. Whilst roughly four in ten visitors (38 per cent) will be spending less than £20, the majority spend more. Most are spending between £20 and £50 (41 per cent) during their visit and a significant number contribute considerably more to the local economy.

Despite the terrorist attacks on 7/7, 58% of those surveyed claimed to feel 'fairly safe' and 38% feel 'very safe'. The City Guardians no doubt contribute to this – those who did feel unsafe said that next to extra police, more City Guardians would have the greatest impact on their sense of security. One in five said they had seen one during their visit and, of those who had talked to them, 80 per cent found them helpful. The terrorist attacks have however caused people to be more careful in London (40 per cent), to take the tube and public transport less (45 per cent) and feel more afraid (13 per cent), only a very small minority said that it had affected how frequently they visited the area (2 per cent) – a reassuring sign that the medium-term impact on visits and the local economy is limited.

Cleanliness was generally regarded as acceptable (77 per cent) and 37 per cent had seen a member of the Clean Team when they visited. But although overall people were happy with the quality of the area and rated it better than others they had visited, there were however concerns with street urination perceived to be by far the biggest street issue. Other issues were chewing gum, begging and the quality of street furniture – particularly in the Piccadilly Circus area.

The Heart of London brand is also starting to achieve recognition – nearly a fifth of those interviewed had heard it (18 per cent). The logo and website achieved much lower levels of recognition (11 per cent and 3 per cent respectively) – but of those who did find [www.heartoflondon.info](http://www.heartoflondon.info), 50 per cent found it useful.

The overriding outcomes of the report are that the Heart of London area is regarded positively by visitors and Londoners alike. The report also highlights some clear areas for action where increased focus and investment may yield higher satisfaction, more visits and a greater economic contribution to the Heart of London.

# THREE

## Background Details

### 3.1 Methodology

Five students of the British Study Centre spent altogether 100 hours interviewing visitors to the Heart of London area at two key sampling points – Piccadilly Circus and Leicester Square. Table 1 below lists the sample points and the number of interviews completed at each location. A further breakdown of sample points, time of interviews and number completed can be found at appendix 2. The total percentage for some questions is not always 100%. If it is more than 100%, it means that several answers were possible. If it is less than 100%, it means that for some reasons interviewees didn't want to answer that question. It is part of the margin of error.

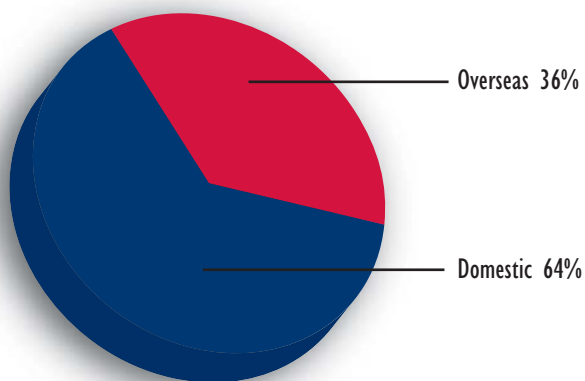
TABLE 1

Location	No Interviews	Percent
Piccadilly Circus	195	36%
Leicester Square	348	64%
<b>Total</b>	<b>543</b>	<b>100%</b>

The survey randomly sampled domestic and overseas visitors. A 64% domestic, 36% overseas user split was achieved (figure 1).

FIGURE 1

Number of domestic / overseas visitors-users



### 3.2 Survey analysis

The results of the survey were analysed to include analysis by place of usual residence, sampling point, age and gender to see whether variations occur. Where differences are significant they have been included within this report.

# FOUR

## Reasons for visiting the Heart of London area

The main reason for visiting the Heart of London area is meeting someone (28%) followed by seeing the sights (20%) and walking through (19%). A smaller number of users stated their main reason to be shopping (14%) or business/work (14%) or going to pubs and bars (13%). Note that for this question several answers were possible.

Few users to the Heart of London specified visiting restaurants (9%), going to the theatre and to the cinema (both 6%), and visiting nightclubs (5%).

FIGURE 2

Purposes for visiting the Heart of London area

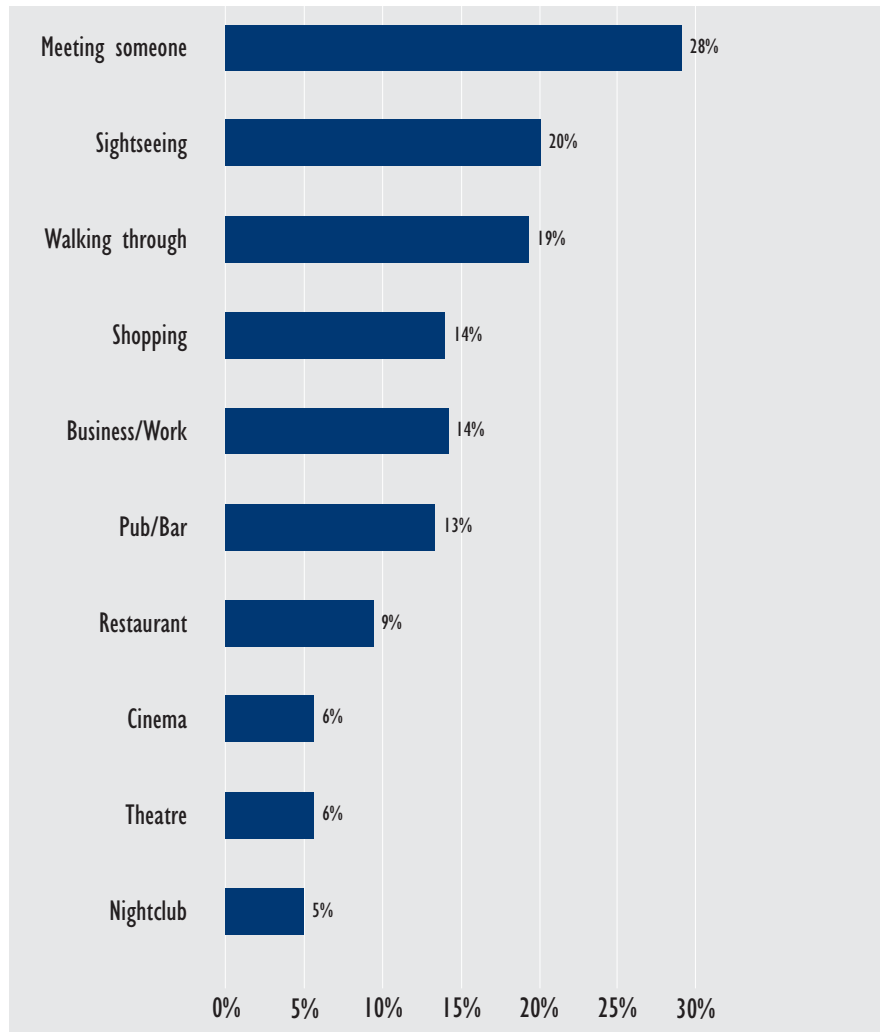
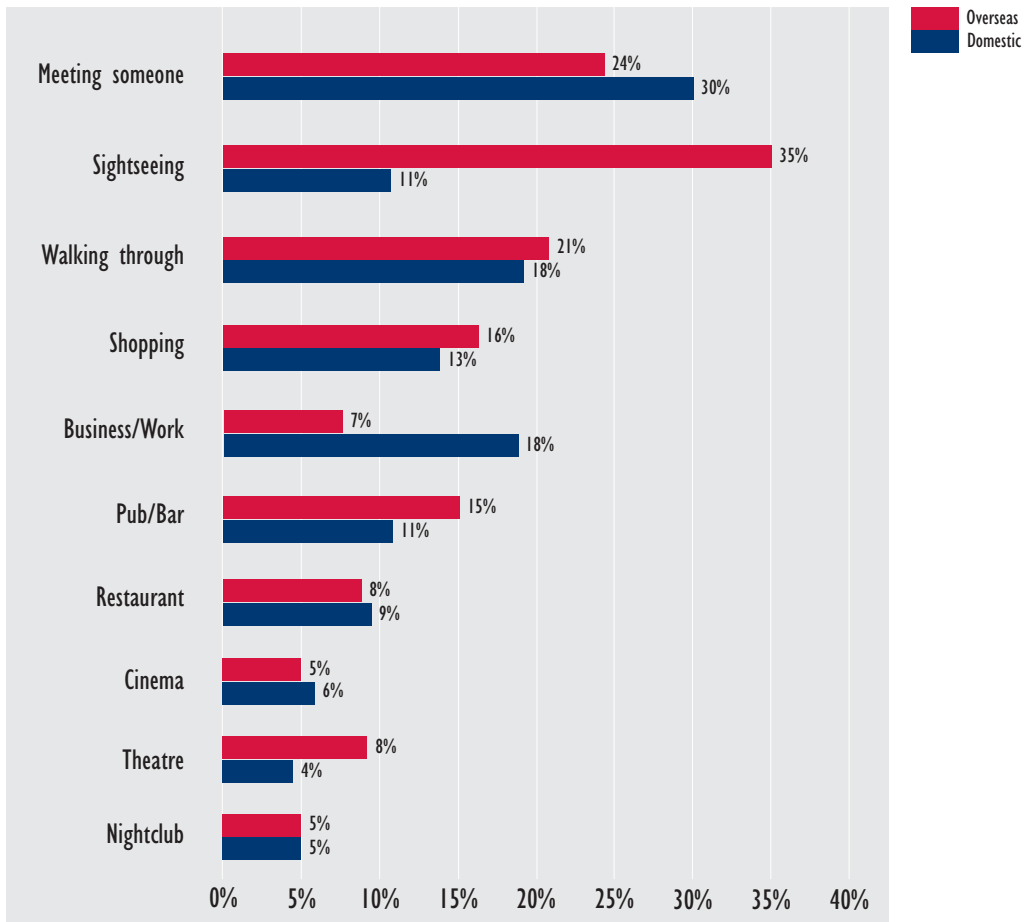


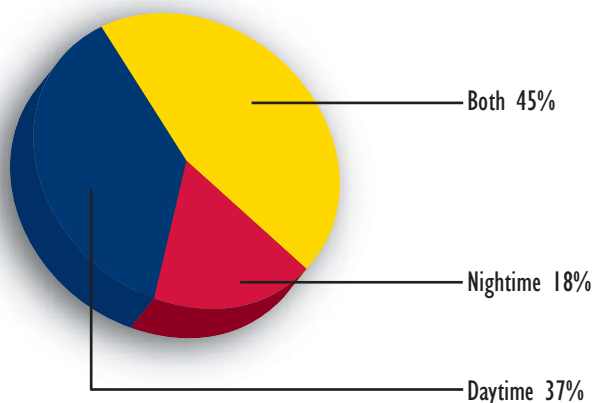
Figure 3 shows that 35% of overseas users' main reason for visiting is to see the sights compared to 11% of domestic. 30% of domestic users' main reason for being there is to meet someone (24% of overseas). Business/Work was the purpose of visit for 7% of overseas and 18% of domestic. Similar percentages stated their main reason to be walking through, shopping, visiting restaurants, theatres, cinemas, pubs and bars, nightclubs.

**FIGURE 3**  
Purposes for visiting the Heart of London area - Domestic / Overseas



## FIVE Time for Visiting the Heart of London area

**FIGURE 4**  
At what time do you visit the area mostly?

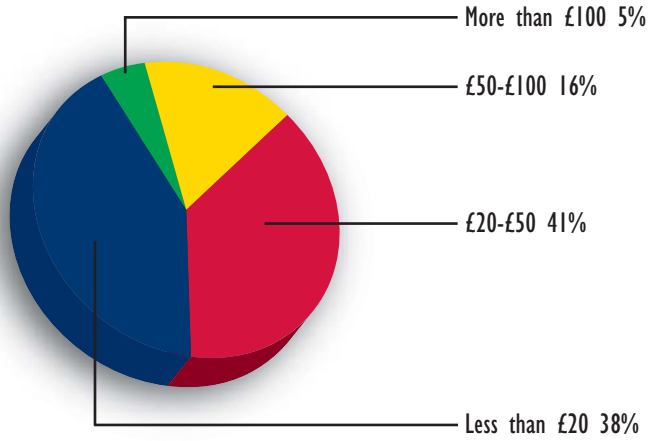


# SIX

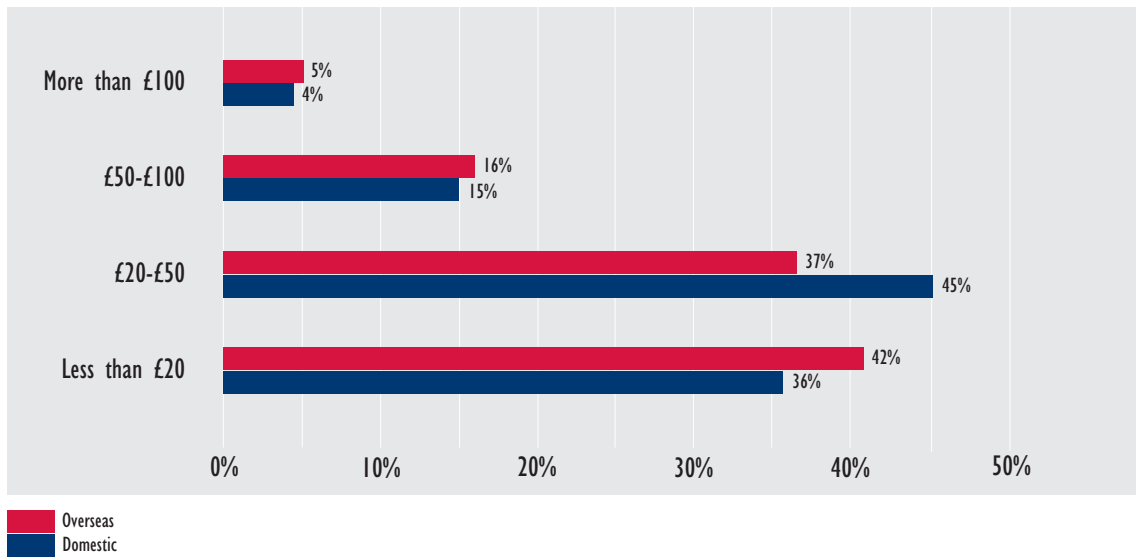
## Money spent

The average amount of money spent per visit is less than £50 for 79% of consumers (figure 5). More than 40% of overseas visitors spend less than £20 per visit in the area (figure 6).

**FIGURE 5**  
Average spend per visit



**FIGURE 6**  
Average spend per visit - Domestic / Overseas

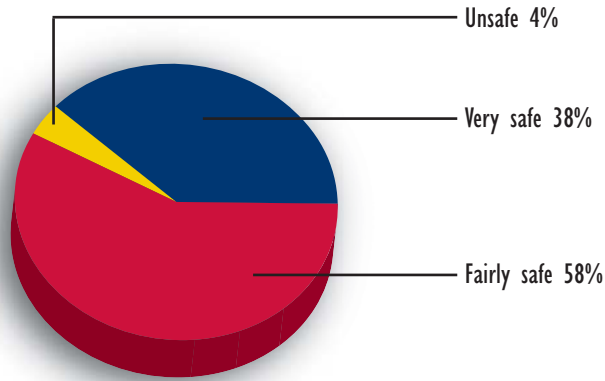


# SEVEN

## Community Safety Issues

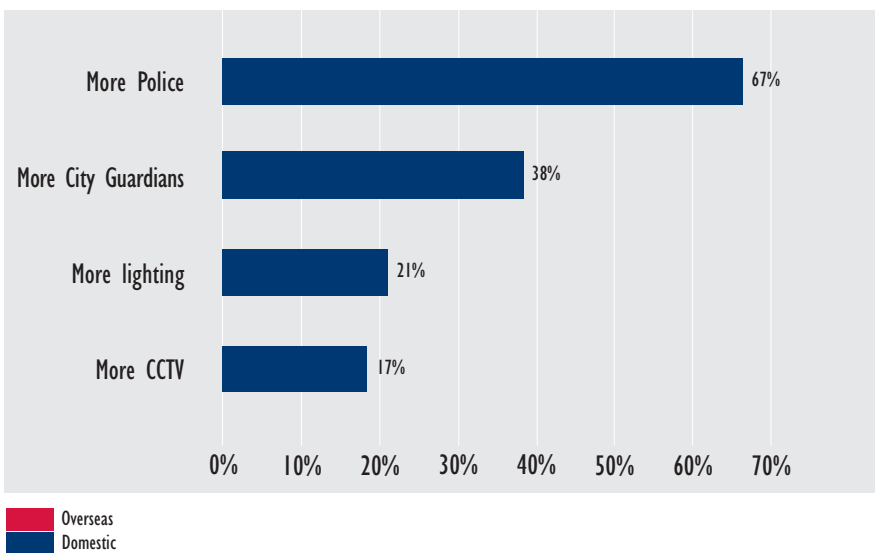
The vast majority of users stated that they felt very safe (38%) or fairly safe (58%) (figure 7). There was no significant difference between the sentiments of men (96%) and women (95%).

**FIGURE 7**  
Safety feeling



Those who felt unsafe in the area (not one user said they felt very unsafe) said they would feel safer if there were more police (67%), more City Guardians (38%), more lighting (21%) and more CCTV (17%) (figure 8). For this question, several answers were possible.

**FIGURE 8**  
What would make you feel safer?

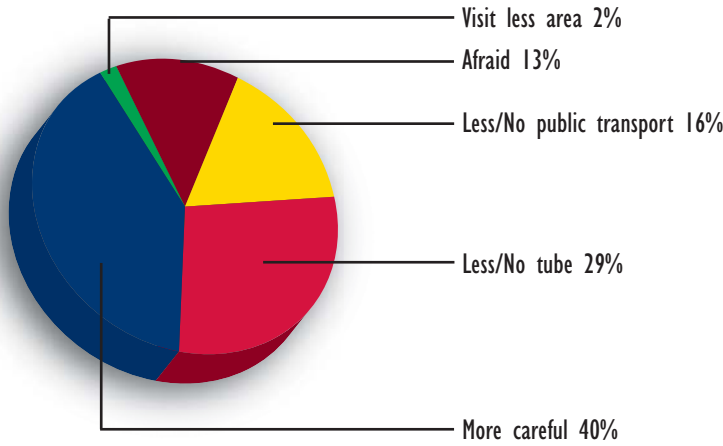


22% of consumers had seen the City Guardians the day they were interviewed. 13% had conversed with them and 80% of these found them useful.

7% of those interviewed had witnessed an anti-social behaviour. For 34% of them, it was related to violence, 24% to verbal insults, 24% to public disorder, 10% to robberies and 7% to alcohol and its consequences.

One quarter of consumers have changed their behaviour since the 7th July. They are more careful (40% of them), they take the tube less or not at all (29%), they use the public transports less or not at all (16%). Only 2% of them visit the area less often and 13% feel afraid or nervous.

**FIGURE 9**  
Different behaviour since 7th July 2005

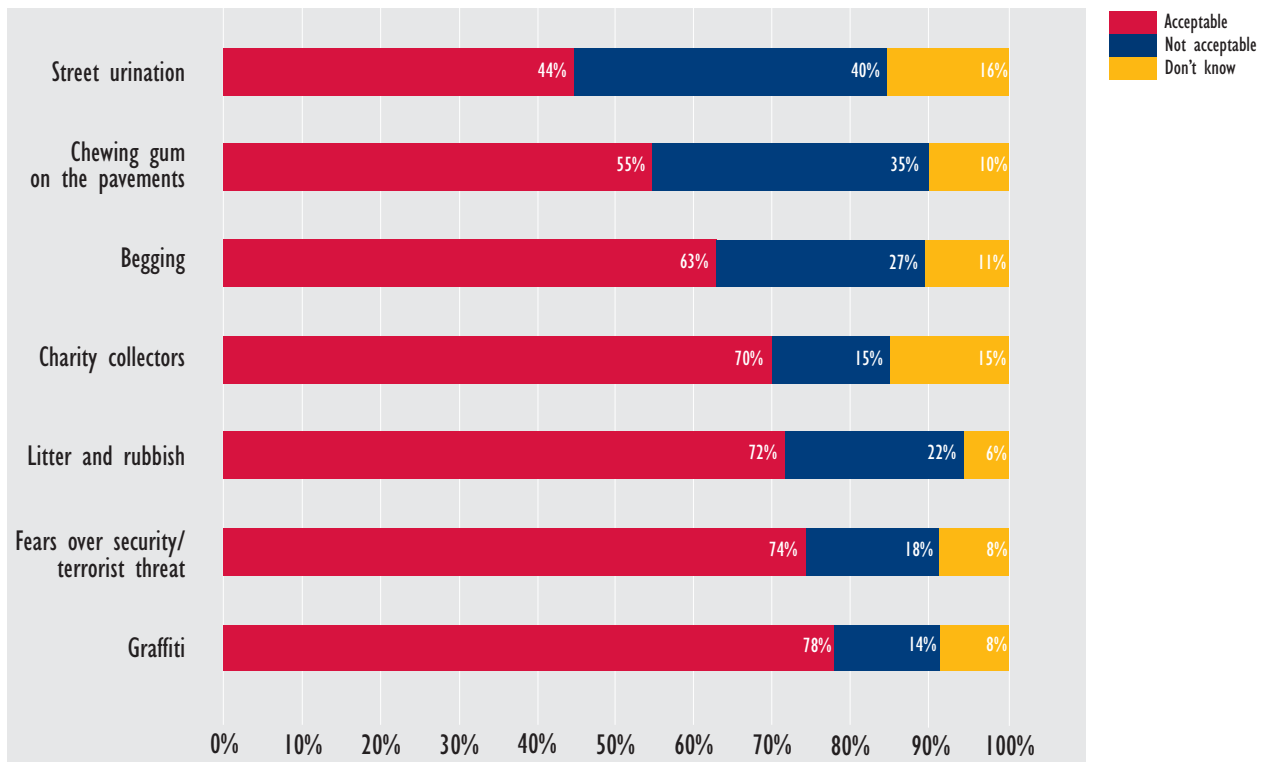


## EIGHT Environment / Streetscene Issues

The questionnaire also examined issues that were perceived to be a “problem”. Consumers were asked to rate how much of a problem they thought issues were as; “acceptable”, “not acceptable” or “don’t know”.

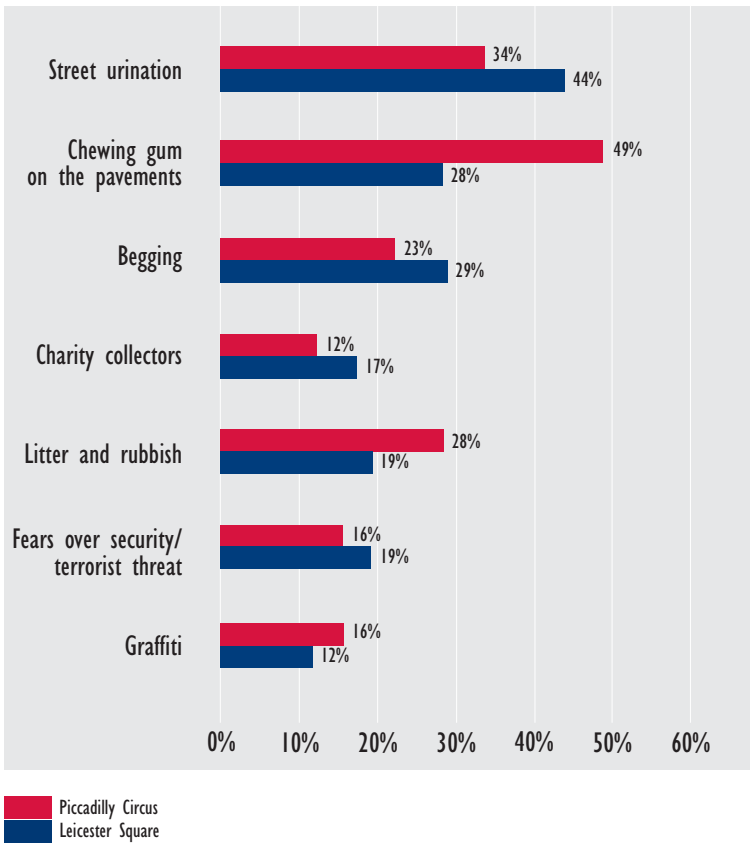
Consumers showed greater awareness of environmental/streetscene issues than community safety (figure 10). Street urination (40%) is perceived to be our biggest street issue following by chewing gum on the pavements (35%), begging (27%) and litter and rubbish (22%). In all street issues, there was no case where the majority of interviewed people found it not acceptable.

**FIGURE 10**  
Main issues in the Heart of London area



Environmental / streetscene issues were again further analysed by sample point to examine any significant differences in opinion. Street urination is seen as being more of a problem by those interviewed in Leicester Square (44%). Chewing gum on the pavements and litter and rubbish are more a concern in Piccadilly Circus (respectively 49% and 28%) than in Leicester Square (respectively 28% and 19%).

**FIGURE 11**  
**Main environmental/streetscene issues in the Heart of London area**  
**Not acceptable rates by sample points**



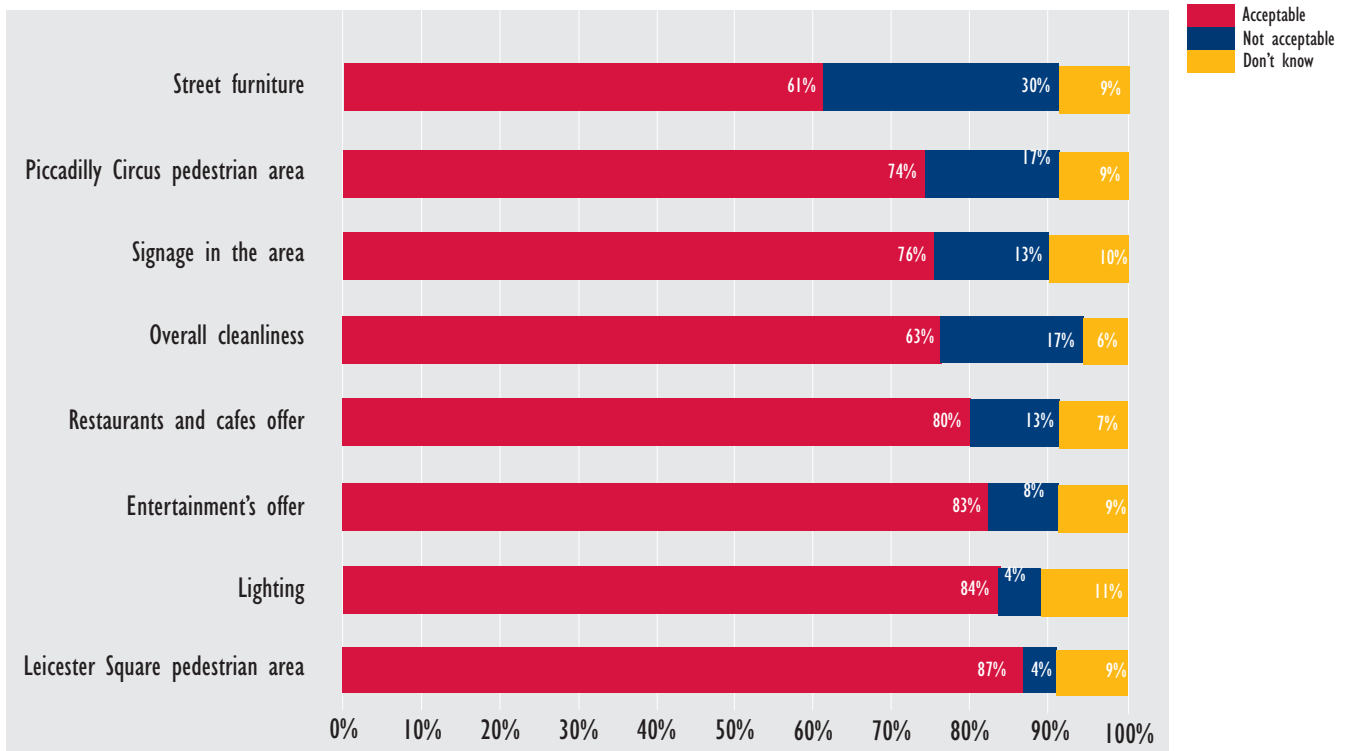
The overall cleanliness was rated by 77% of interviewed users as acceptable. 37% of users had seen one of the Clean Team the day they were interviewed.

# NINE

## Quality of the area

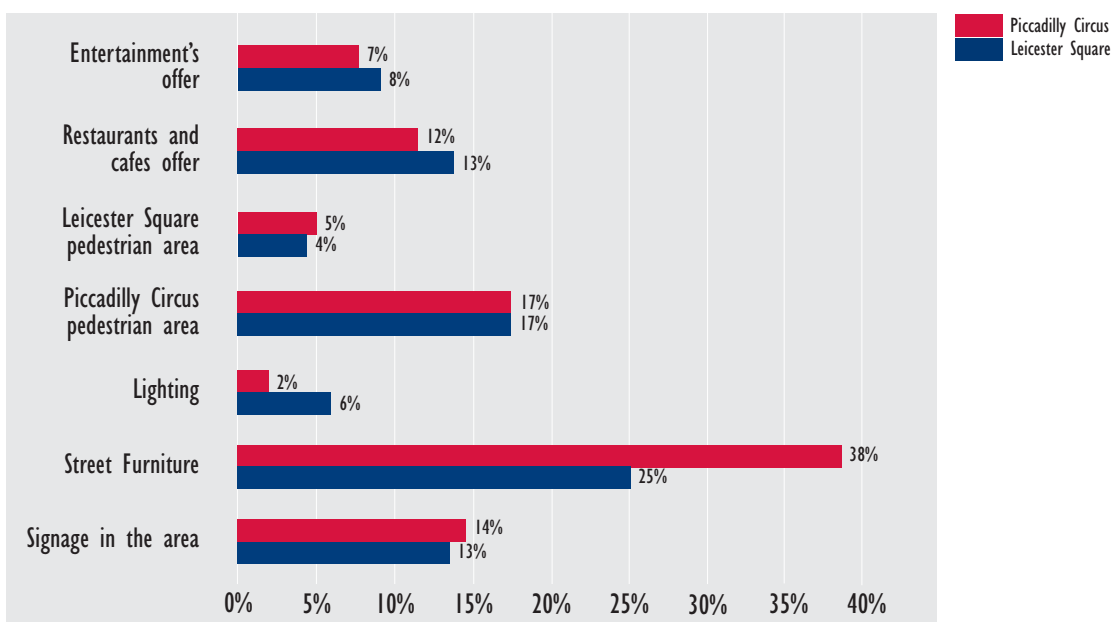
One third of interviewed users rated the street furniture as “not acceptable”. Leicester Square and Piccadilly Circus areas are rated differently (figure 12). Overall, users are quite satisfied with the overall quality of the area.

**FIGURE 12**  
Quality of the Heart of London area



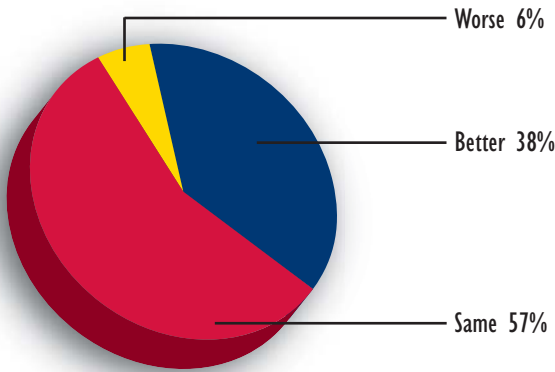
As shown in figure 13 street furniture is rated lower at Piccadilly Circus (38%) than at Leicester Square (25%).

**FIGURE 13**  
Quality of the Heart of London area - Not acceptable rates by sample points



Users seem to be globally satisfied with the area. 38% of those interviewed rated it better than other areas they have visited in London and only 6% found it worse than other areas.

**FIGURE 14**  
**Experience in the Heart of London compared to other areas in London you have visited**

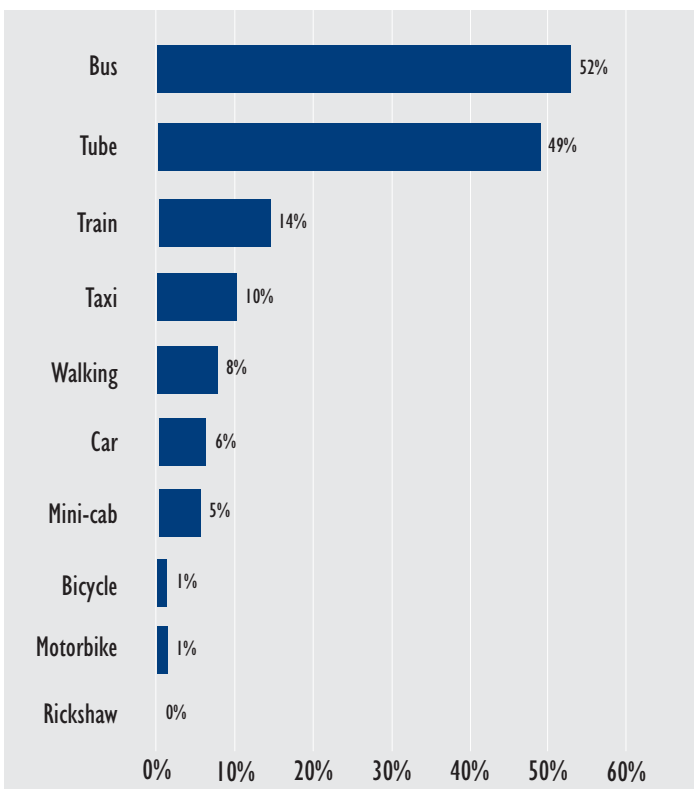


At the end of the questionnaire, users were asked to comment on the area. 59% of comments were positive, 20% communicated something negative and 29% suggested something to improve the area. All comments are available on request.

## TEN Traffic / Transport Issues

Results show that visitors to the area at night use more than one mode of transport to return home. 52% of visitors use the bus, 49% use the tube, 14% of night time users return home by train and 10% by taxi.

**FIGURE 10**  
**Modes of travel used late at night**



## ELEVEN Marketing

18% of those interviewed claimed to know or recognise the name "Heart of London". 21% claimed to have heard of it mostly in advertisements, 21% on TV/radio, 16% in the newspaper and 15% could not remember how they had heard of it.

The Heart of London logo was recognised by 11% of people interviewed. 23% claim they had seen it before mostly in advertisements and 28% of those interviewed did not remember where they saw it.

3% of interviewed people knew the Heart of London website and 50% found it useful.

## TWELVE Response profile

### 12.1 Age and Gender

A total of 542 surveys were completed achieving a good mix of age ranges (see figure 14) relating to the real age structure of western countries.

FIGURE 16  
How old are you?

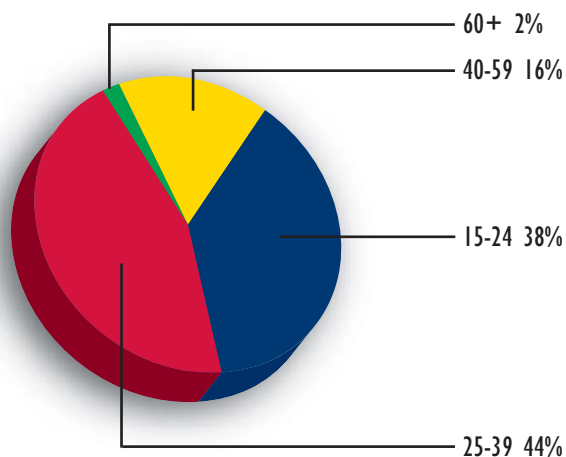
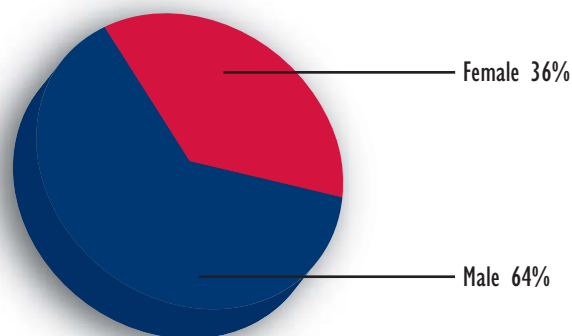


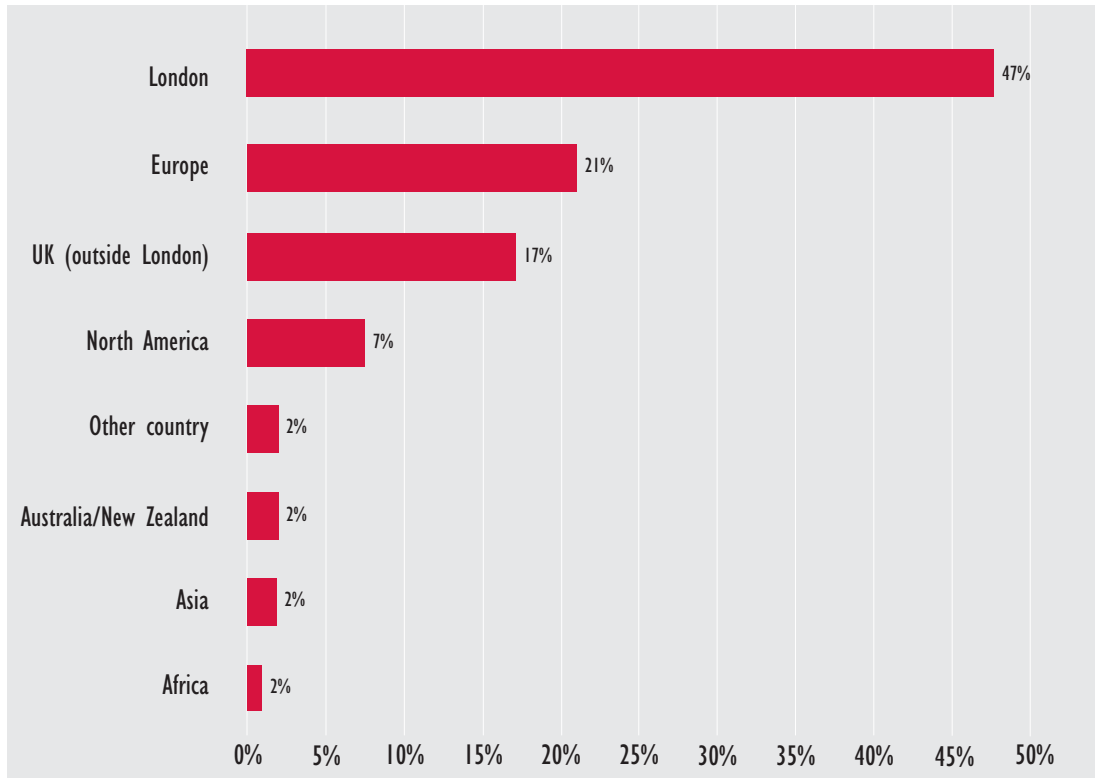
FIGURE 17  
Gender



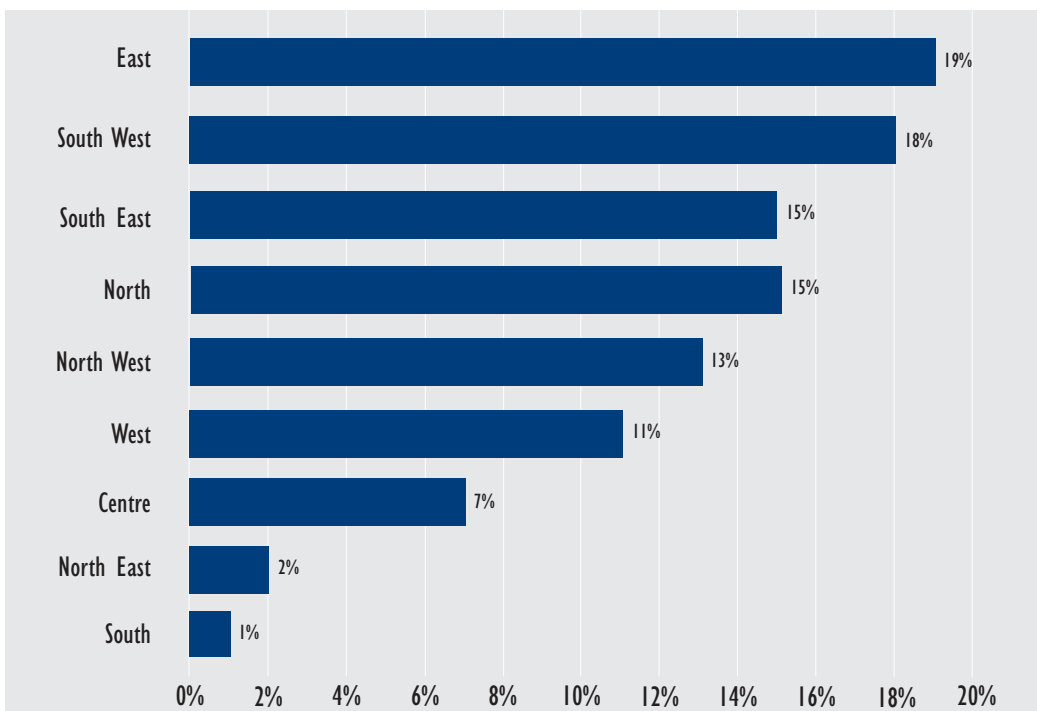
## 12.2 Usual Place of Residence

Overall, 36% of those interviewed were from overseas and 64% of them were domestic. Almost half were from London (Greater London) and 17% from elsewhere in the UK. Europe was the highest overseas origin of visitors at 21% followed by North America at 7%.

**FIGURE 18**  
Where do you usually live?

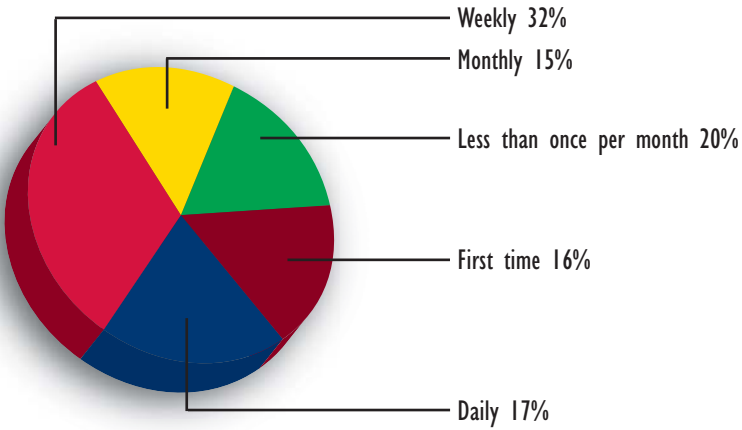


**FIGURE 19**  
Where do you live in London?

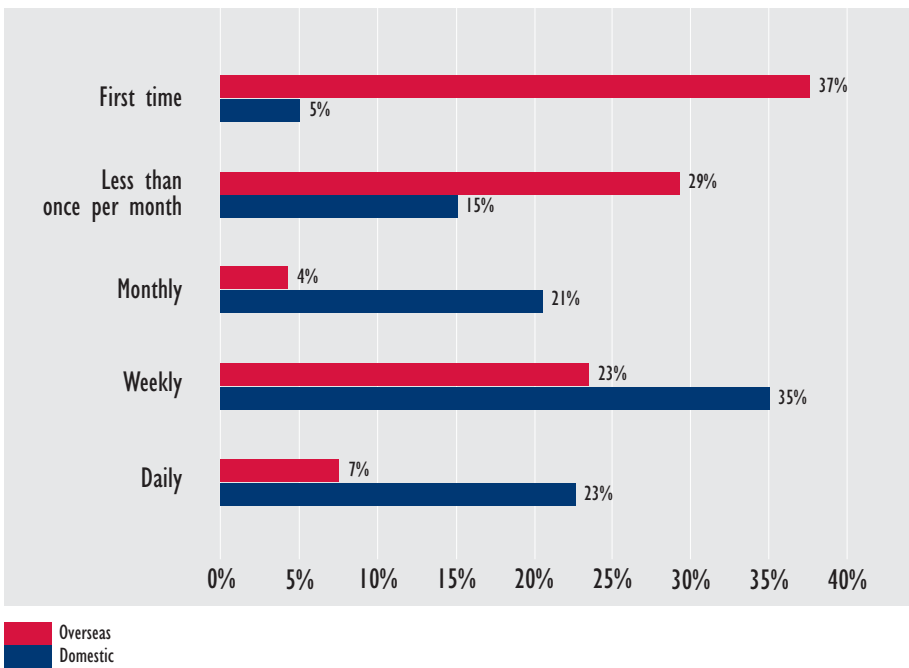


### 12.3 Frequency of visit

**FIGURE 20**  
How often do you visit the Heart of London area?



**FIGURE 21**  
How often do you visit the Heart of London area? Domestic / Overseas





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The Business Improvement District

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