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Heart of London Business Alliance

PERCEPTION SURVEY

07

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Introduction

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

The perceptions of those who use the Heart of London area are key indicators of both successes and areas where there is need for improvement, change of policy or reallocation of resources. User perceptions on issues ranging from cleanliness to promotional activity to security have been measured and analysed. This will, we believe, help us to better understand the needs, views and opinions of those who use the Heart of London area.

We sought to understand who comes to the Heart of London, why and when. We also looked at new issues which did not appear as relevant in the original survey, including the future impact of the Olympics and the ongoing terrorist threat on peoples' perceptions of the area.

The results of the survey clearly show the positive changes which have occurred in the area in the last two years. The Heart of London has become considerably more family friendly, with families visiting for a number of entertainment purposes, both day and night.

The increased family appeal of the area may be because a number of previous concerns have been assuaged. Perceptions of cleanliness have notably improved since 2005 with litter, graffiti, street urination and lighting regarded as less of a concern amongst visitors in 2007.

The results of the research show that tackling the concerns and issues identified in the 2005 Perception Survey has been a valuable and worthwhile task. The study clearly highlights significant improvements in the way visitors to the area perceive their experience of the Heart of London.

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 telephone on 0207 839 3409 or by email at info@heartoflondonbid.co.uk

Sarah Porter
Chief Executive
Heart of London Business Alliance

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Executive Summary

The results of the 2007 perception survey show a great deal has improved in the Heart of London since 2005. Working together with our partners on initiatives has had extremely positive results and has added real value to improving the visitor experience. However, we recognise that this is not a reason to rest on our laurels and that this survey, along with the business survey carried out at the end of last year, gives us an opportunity to plan for the future.

These results provide a useful benchmark against the results of 2005 as to how the area is being used and how it is being perceived.

- Our successes in partnership cleaning operations are reflected by increased "acceptable" responses to questions on litter, graffiti, street urination, lighting and cleanliness. However, chewing gum on the pavements, street furniture, signage and street collections are regarded increasingly negatively by visitors to the area and are issues we must continue to tackle. The success of our work on levels of street urination shows that such intervention is highly worthwhile to tackle concerns.

- Whilst the family appeal of the area is definitely increasing, the average visitor to the Heart of London is aged 24-39 (42%)

- Large numbers of people still say they are in the area "passing through". Although some passing through is inevitable as both Leicester Square and Piccadilly Circus act as transport and walking hubs, we would like to see this number reduced, as more people stop to do something in the area before moving on. As the survey shows, half of all visitors reported being influenced by marketing materials (a 32% increase from 2005). This may encourage more people to remain in the area to enjoy what is on offer rather than simply using it as a thoroughfare.

- Although entertainment venues are rated as acceptable by the vast majority of visitors to the area, compared to 2005, fewer respondents stated that they were their principal reason for visiting the area. Therefore, we recognise that the improved quality of entertainment venues in the area would benefit from further promotion.

- The survey shows that there is a large and growing luxury product market in the Heart of London. We plan to develop the promotion of the luxury sector alongside promoting the area's appeal to families.

- The Heart of London City Guardians have become increasingly popular since 2005 and this has contributed to the increasingly positive responses regarding safety. In 2007 over twice as many respondents had seen the Guardians, compared to 2005. 84% of those who spoke to the Guardians found them useful.

- Visitors generally feel very safe in the Heart of London area and this is increasing over time. In 2005, 38% of respondents felt very safe in the Heart of London, whereas in 2007, 46% reported feeling very safe.

Methodology

1) The Survey

This survey took place over fourteen days in November. Our independent research team of 12 surveyors took 795 random interviews over 205 hours interviewing people in the Heart of London area at two sampling points: Leicester Square and Piccadilly Circus. The surveys took place between 11:30am and 10:00pm in 3, two and a half hour shifts.

Location	No. Interviews	Percentage
Piccadilly Circus	400	50%
Leicester Square	395	50%
Total	**795**	**100%**

Respondents were randomly selected with no bias toward race, age, ethnicity or country of origin. However, surveyors were told to carry out approximately 50% of interviews in Leicester Square and 50% in Piccadilly Circus and to ensure those surveyed were an even balance of males and females.

It should be noted that the 2005 survey was taken in mid summer, whilst the 2007 survey was taken in mid winter. Invariably visitors will partake in different activities and have different concerns at different times of year.

2) The Report

In so far as it is possible, the 2007 report has used the 2005 report as its benchmark. However, in there are two exceptions to this rule.

- In the 2005 survey a number of questions were presented as multiple choice. This skewed results, as preferences were not prioritised and overall percentages aggregated to more than 100%. In situations where these results were used as a benchmark or point of comparison in the 2007 report, ratios of the 2005 percentages have been used, to allow 2005 figures to serve as an effective point of comparison for 2007.

- After the 2005 survey had taken place, two significant events altered the list of key issues in the Heart of London. Firstly, London was chosen to be the host city for the 2012 Olympics. Also, planned bombings in Haymarket, although unsuccessful, were widely publicised. Questions on these issues were included in the 2007 survey, despite having no 2005 figures to benchmark them against. Therefore, in these two cases, 2007 statistics will serve as benchmarks for future surveys.

3) Analysis

All results have been thoroughly analysed and are available both online and as an appendix to this report.

However, to make this study both interesting and accessible, only a proportion of those figures are represented in the report. Those selected have been chosen due to their differences from the benchmarks, and the interesting story they tell. As will become apparent, as you go on to read the report, both "good" and "bad" news stories are presented in visual and verbal form.

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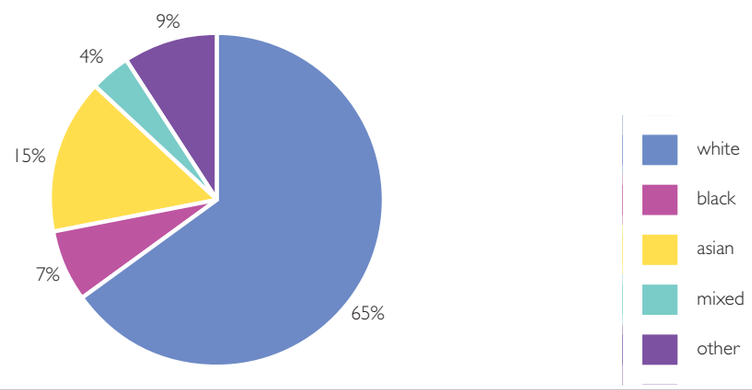
Who comes to the Heart of London?

Nearly 2 million people come to the Heart of London every week. 795 of those people were surveyed over a 14 day period; this is an average of 57 people per day.

Visitor age in 2007 was similar to 2005. In 2005, 82% of visitors to the area were aged between 15 and 39; in 2007 this was 83%. The only slight change shown was in appeal to the 60+ demographic, representing 2% of respondents in 2005 and 5% in 2007.

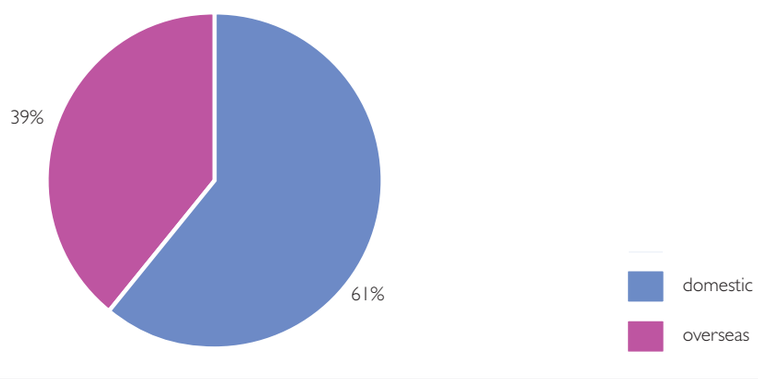
The ethnic breakdown of visitors to the Heart of London is close to the general ethnic makeup of London. In London overall, 71% of residents are white, whilst 29% are of other ethnicities. In the Heart of London, 65% of visitors are white, whilst the remaining 35% are of other ethnicities. The greater diversity of the Heart of London reflects its status as an international visitor attraction and a hub for Londoners of all backgrounds.

Ethnicity of respondents



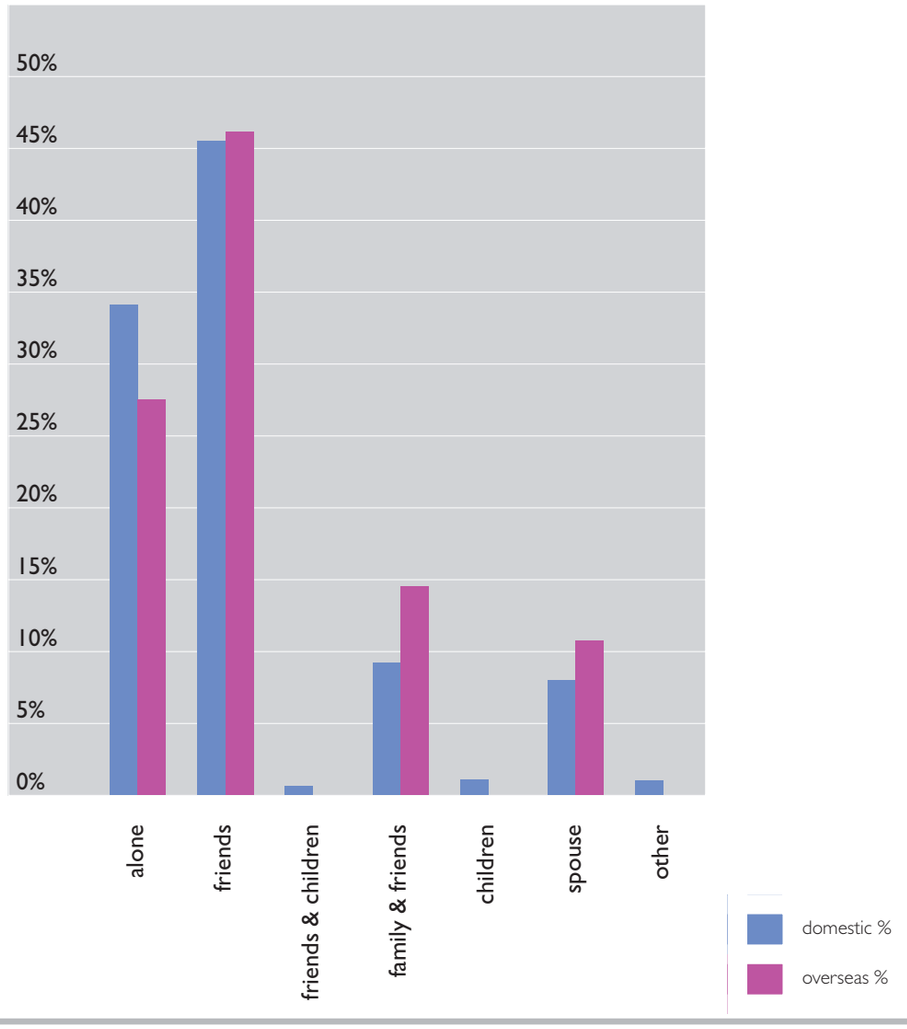
Compared to 2005, an almost identical percentage of respondents were from the UK (63%) or overseas (37%).

Percentage of domestic / overseas visitors



There is a marked difference in who respondents travel to the Heart of London with. British people are 6% more likely than those from abroad to be in the area alone. This, as will be shown in more detail later, relates to the fact that the British use the area for more solitary pursuits: where 38% of the British are passing through the Heart of London or in the area on business, only 24% of overseas visitors are in the area for those reasons. At the same time, international visitors are more likely to be in the area with friends or family, reflecting the more social activities for which they use the Heart of London.

Individual or group status of respondents' visits to the area



In general, people are visiting the Heart of London more frequently than in 2005. 49% of respondents visit the area on a daily or weekly basis. In 2005, this number was 41%. The percentage (17%) of daily visitors has remained the same – reflecting the fairly static size of the workforce in the area.

The number of overseas return visitors has increased significantly since 2005. In 2005, 37% of international respondents had never visited the area before. This may reflect the area's increased popularity as a sightseeing and family destination and also shows that very few people fear terrorism in the area (discussed further later).

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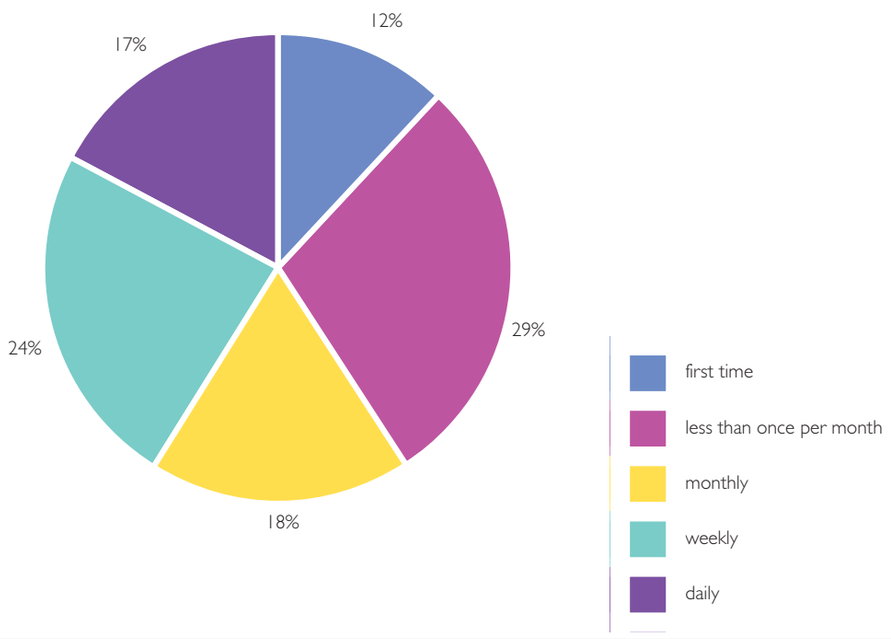
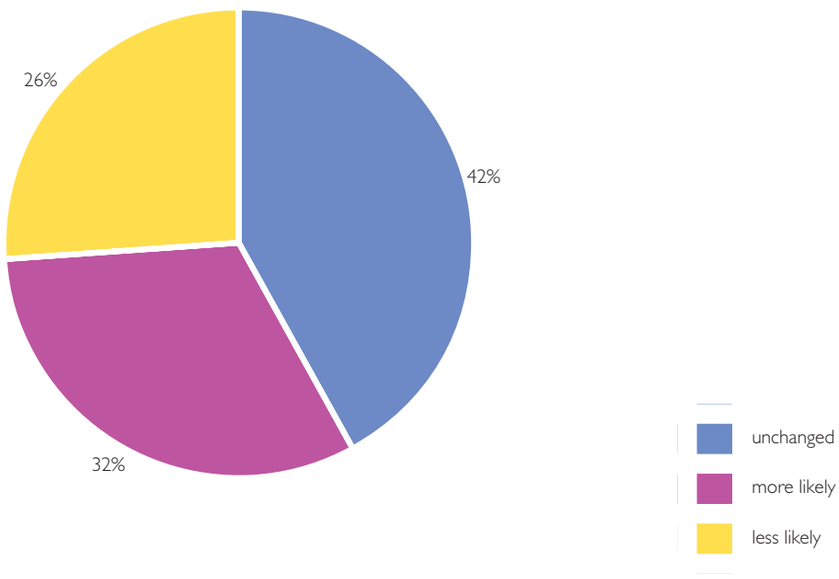
Visitor frequency to the Heart of London



Although for many the Olympics is a major draw to London, for others it has been a cause of concern. Businesses in the West End have worried that visitors will not be interested in their area and that some will avoid London altogether as they expect the city to be overcrowded. However, the Olympics appear to have a negligible impact on the likelihood of people visiting the Heart of London. Marginally more people (6%) regard the Olympics as a draw rather than a deterrent.

Impact of the Olympics on visitor likelihood

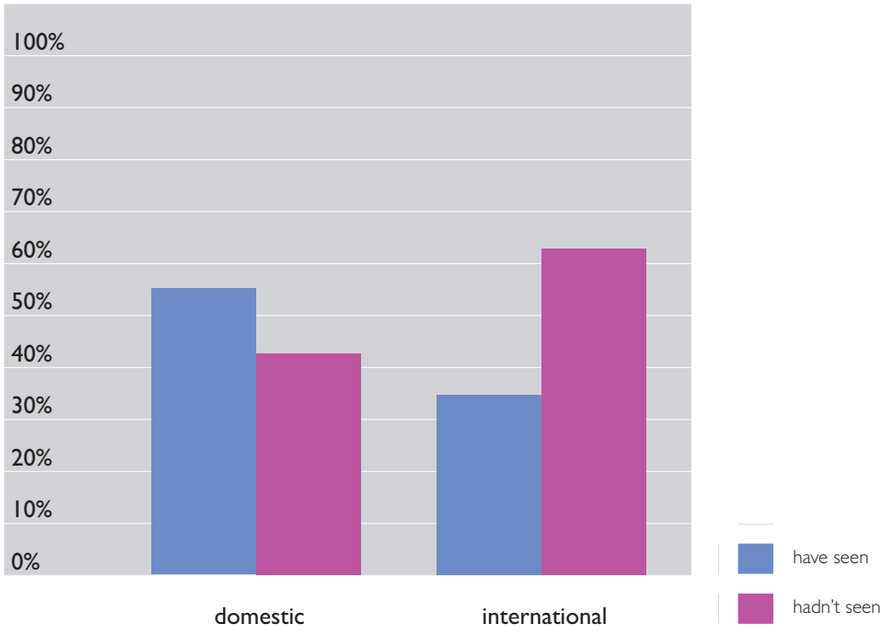


Why do they visit?

As with any area, a number of people are attracted to the Heart of London by marketing collateral they have seen. In 2005, only 18% of visitors to the Heart of London had seen marketing for "the West End" in advance of this visit. In 2007, 50% of respondents had seen marketing.

It is interesting to note that marketing in the UK has been more successful than international marketing. 57% of UK respondents had seen West End marketing, whilst this figure was 37% for internationals. However, the fact that 37% of visitors from a wide array of countries have seen marketing collateral for the West End remains remarkable.

Whether respondents had seen any type of marketing or promotional activity for 'The West End'



People's reasons for visiting the Heart of London have changed considerably since 2005. Family activities, such as sightseeing, shopping and restaurant visits have increased 9% overall, whilst activities solely appealing to adults, such as visiting pubs, bars and nightclubs have decreased 10%. These activities account for 58% of family activity in the area, but only 49% of overall activity.

However, although the area has obviously become more attractive to families in the area, they remain 5% more likely than average to describe themselves as passing through the area (25%).

Contrary to common conceptions, the Heart of London's reputation as both a day and night destination encourages, rather then discourages, family visits. Families are more likely than average to visit the area at night. Where 74% of respondents visit the area at night or both day and night, 83% of families visit at those times.

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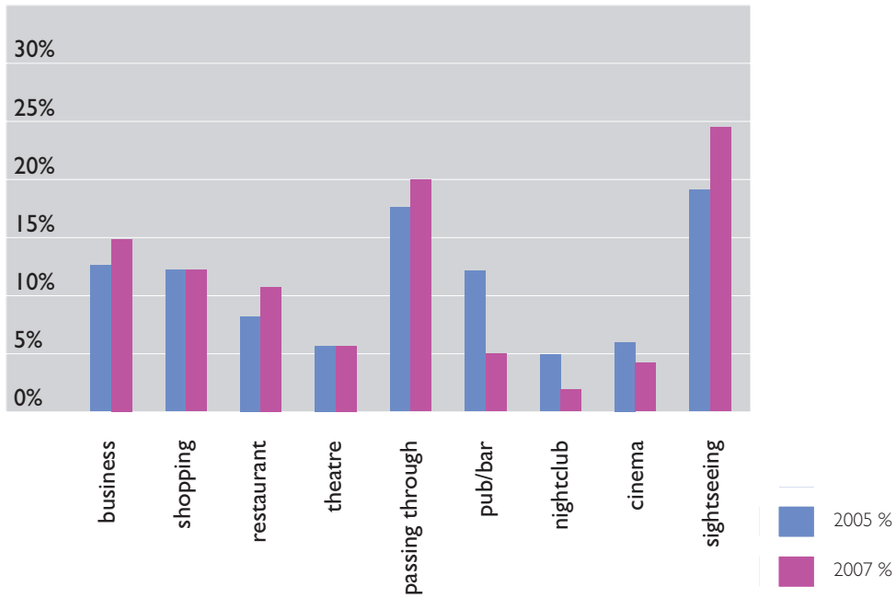
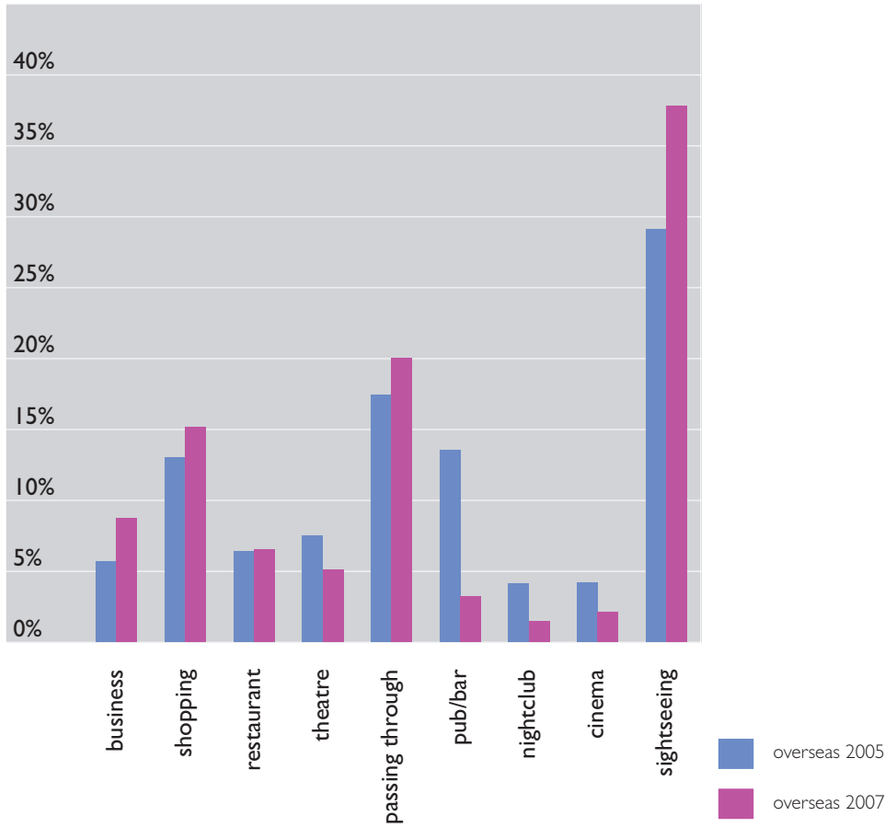
Purpose for visiting the area 2005/2007 comparison



The area's increased appeal to sightseers is even more obvious when 2005 and 2007 data from overseas visitors – most likely to be tourists – is compared.

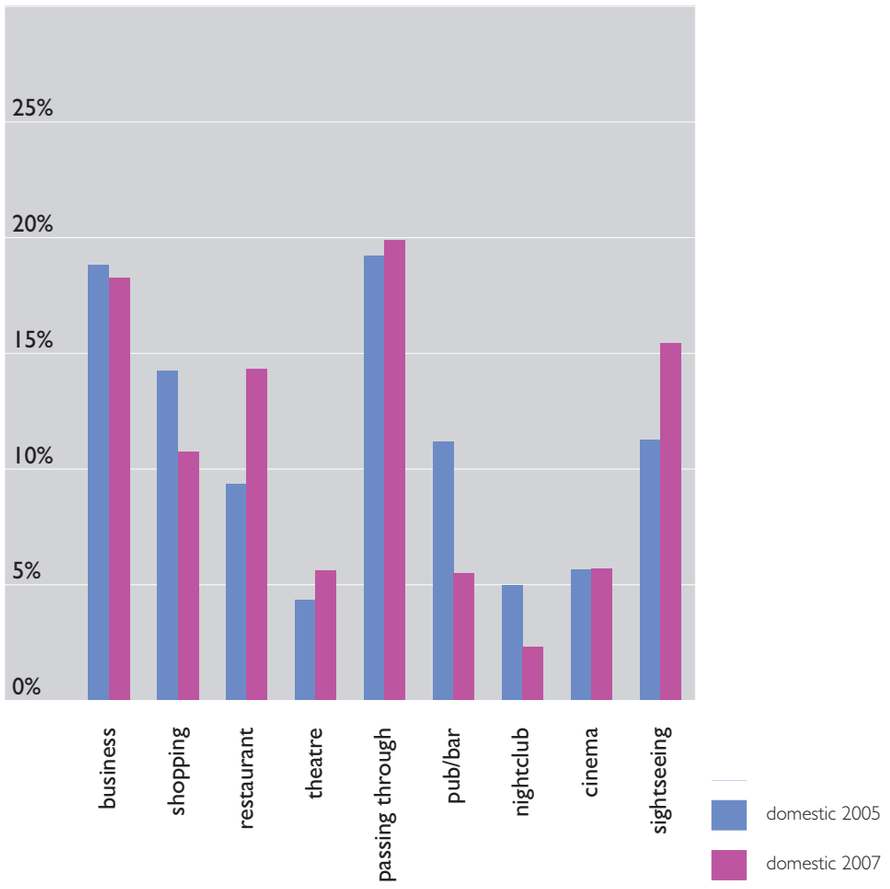
Overseas' user purpose for visiting the area



It is interesting to note that among the British, as well as internationals, the Heart of London is an increasingly popular sightseeing destination.

However, for the British the area is increasingly regarded as an entertainment hub: although bar visits have declined, cinema, restaurant and theatre visits have increased.

Domestic user purpose for visiting the area



At the same time as the area's increased appeal to tourists and families should be noted, it should also be recognised that other activities have become less popular. Across all demographics, the popularity of pubs and bars and nightclubs has declined since 2005. The decline in pub visits could be accounted for by the fact that the 2005 survey was taken in summer, when a number of people are willing to sit outside and drink, whilst the 2007 survey was taken in mid winter. In addition, the smoking ban introduced since the benchmark survey in 2005 could have an impact on people's decisions whether to visit pubs and bars.

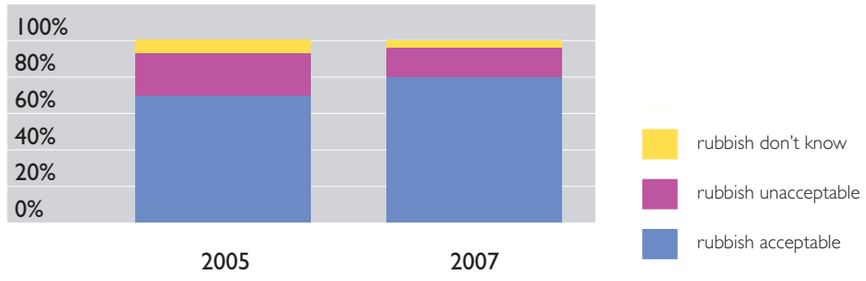
The majority of visitors enjoy the experience of the Heart of London: 92% rate it the same as, or better than, other parts of the city they have visited.

However, an altered demographic and changed reasons for visiting the area have also impacted on visitors concerns regarding the Heart of London.

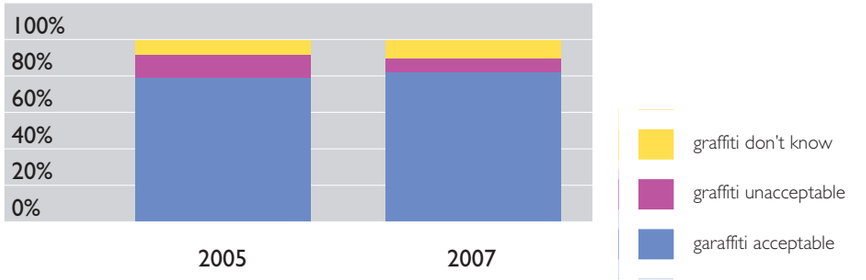
What do people regard as the positives and negatives about the Heart of London?

In 2007 more visitors rated levels of litter, graffiti, street urination, lighting and cleanliness as acceptable than their counterparts had in 2005. Fears over security and the terrorist threat have also improved since 2005. The improvement has been particularly marked in the case of street urination (22%) and overall cleanliness (13%).

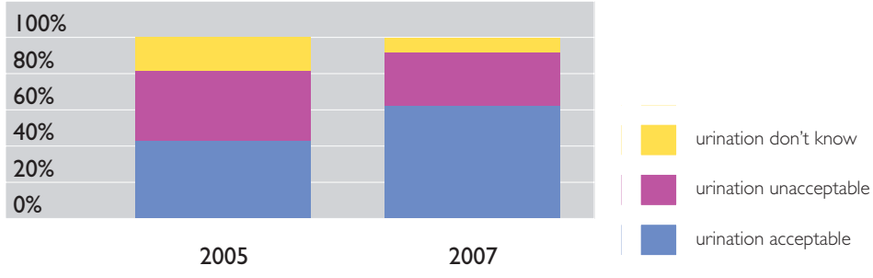
Level of acceptability for rubbish



Level of acceptability for graffiti

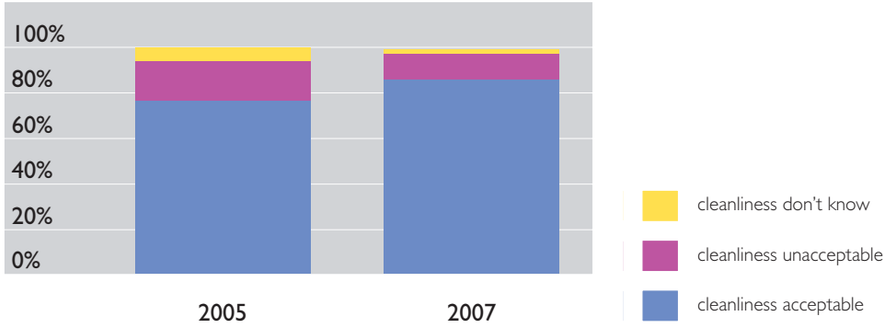


Level of acceptability for street urination

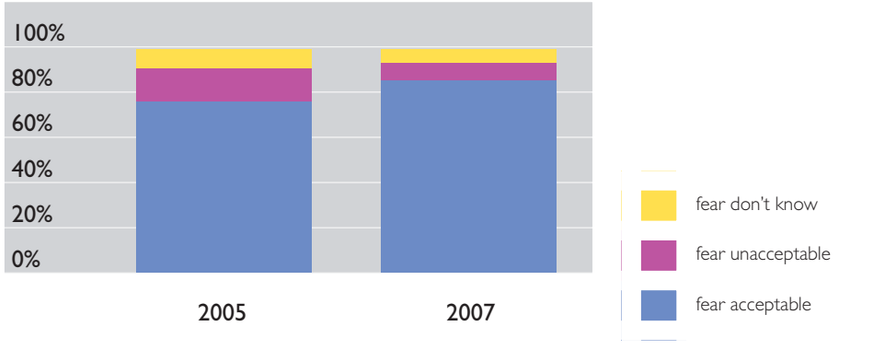


Level of acceptability for lighting

Level of acceptability for cleanliness



Level of acceptability for fear



The incidence of "acceptable" categorisation in regard to entertainment and food and drink venues also increased between 2005 and 2007.

In the case of restaurants, this is reflected by more visitors stating that this is the reason they come to the area.

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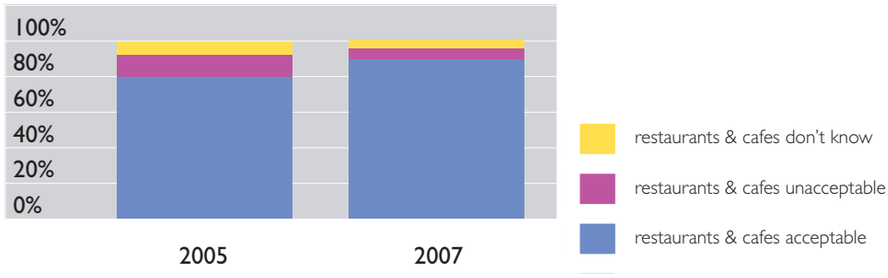
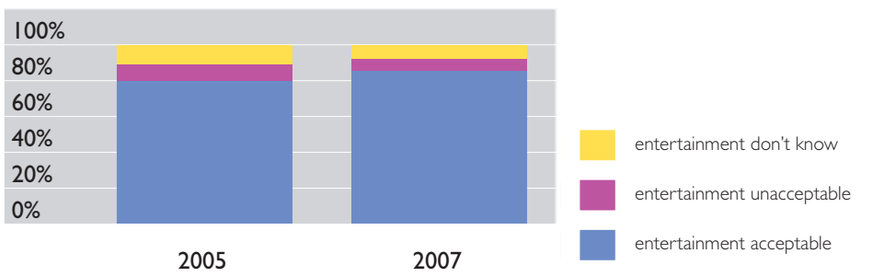
Quality of restaurants and cafes in the Heart of London area



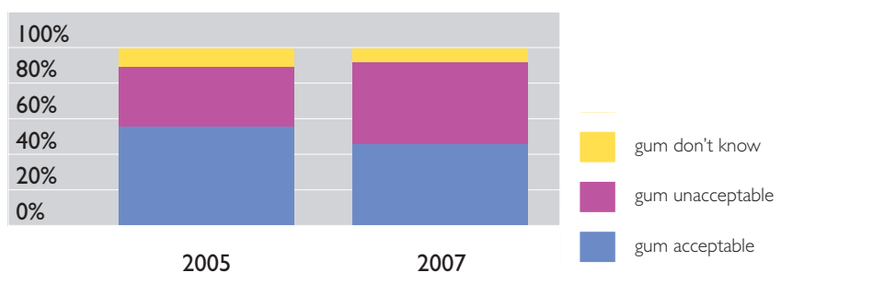
However, in the case of entertainment – theatres, cinemas and nightclubs – there is incongruence: they have improved, yet a smaller percentage of respondents say they are the reason they have come to the area. This may be because the area is attracting more visitors, and therefore the numbers visiting entertainment venues may have remained the same or increased, whilst the percentage visiting for these reasons diminished. People may also be visiting the area for a number of reasons and when asked, have chosen to highlight a different purpose. This result also implies the improved quality of entertainment venues in the area would benefit from further promotion.

Quality of entertainment in the Heart of London area

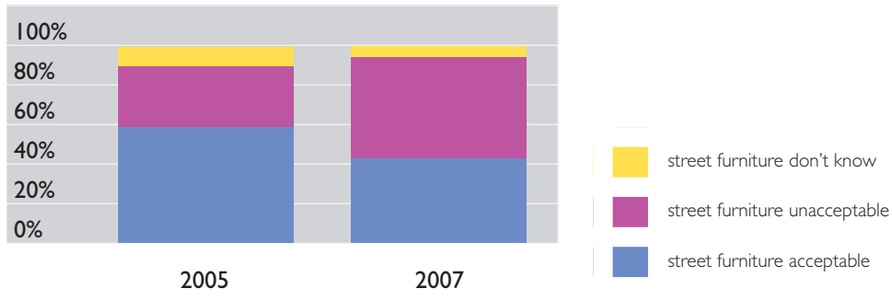


At the same time as concerns over the above issues have receded, other concerns have come to the fore. Chewing gum on the pavements, street furniture, signage and street collection were regarded more negatively than in 2005. In responses to chewing gum and street furniture, the increase in negativity has been marked.

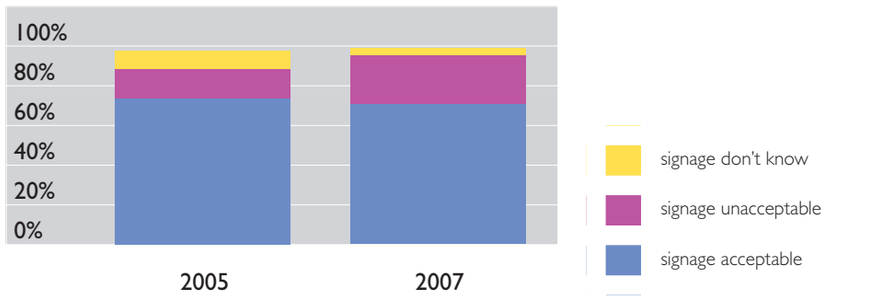
Level of acceptability for gum



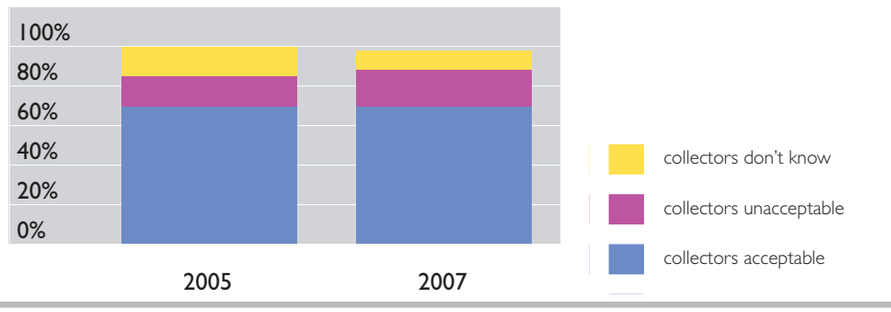
Level of acceptability for street furniture



Level of acceptability for signage



Level of acceptability for collectors

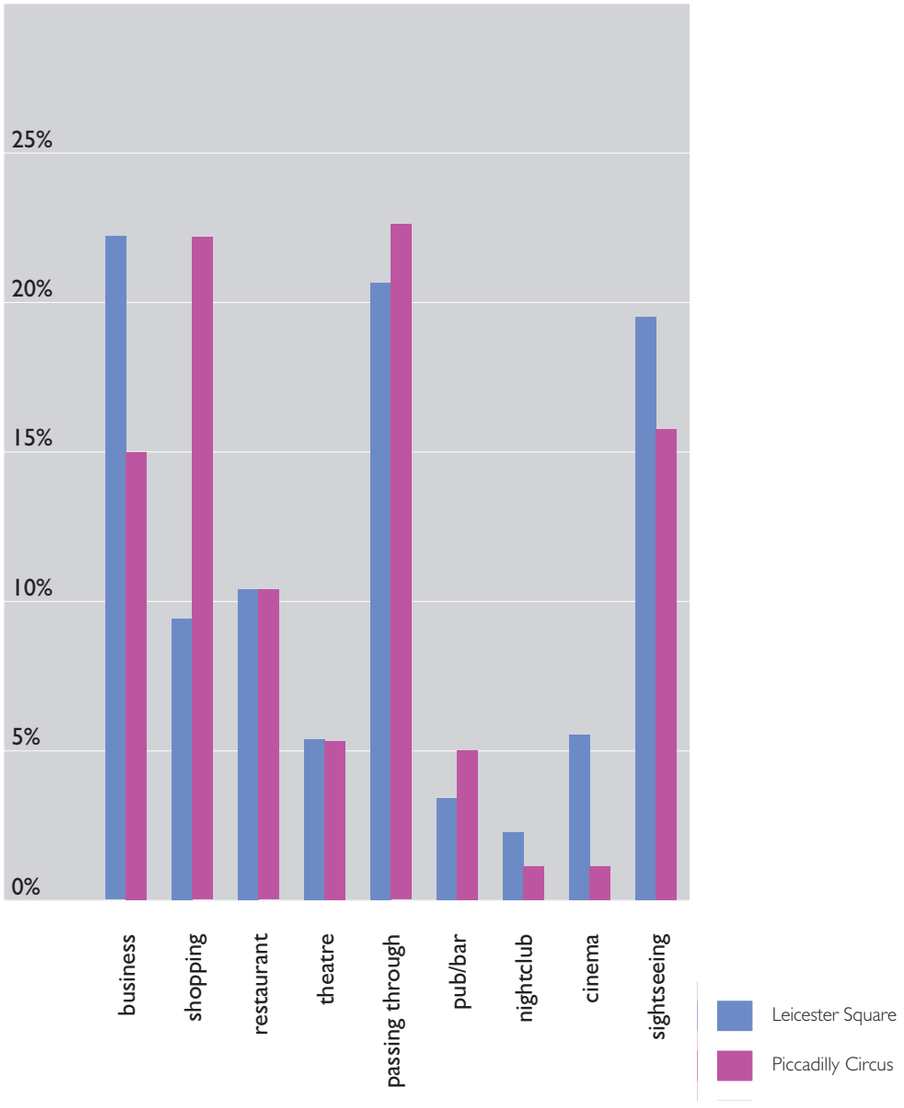


It is interesting to note that respondents in 2007 were more opinionated than those in 2005 regarding street scene issues. A mean of 9.9% of respondents in 2005 responded "don't know" to questions on the streetscene, where in 2007 only 6.1% did not have an opinion.

Although adjacent landmarks, Leicester Square and Piccadilly Circus attract different users for different reasons.

Piccadilly Circus serves as a transport, shopping and eating hub, with the majority passing through, shopping and going to restaurants. Visitors to Leicester Square are more likely to be sightseeing, working or going to the cinema. These findings reflect the different uses of the two locations.

Respondents' purpose for visiting the area Leicester Square / Piccadilly Circus



Concerns also differ between the two locations. In Leicester Square, both chewing gum and street furniture were rated lowest, with 41% of respondents regarding them as unacceptable. Although rated as improved, street urination (26%) and signage (25%) were the only other issues which more than a quarter of respondents in the Leicester Square area rated as unacceptable.

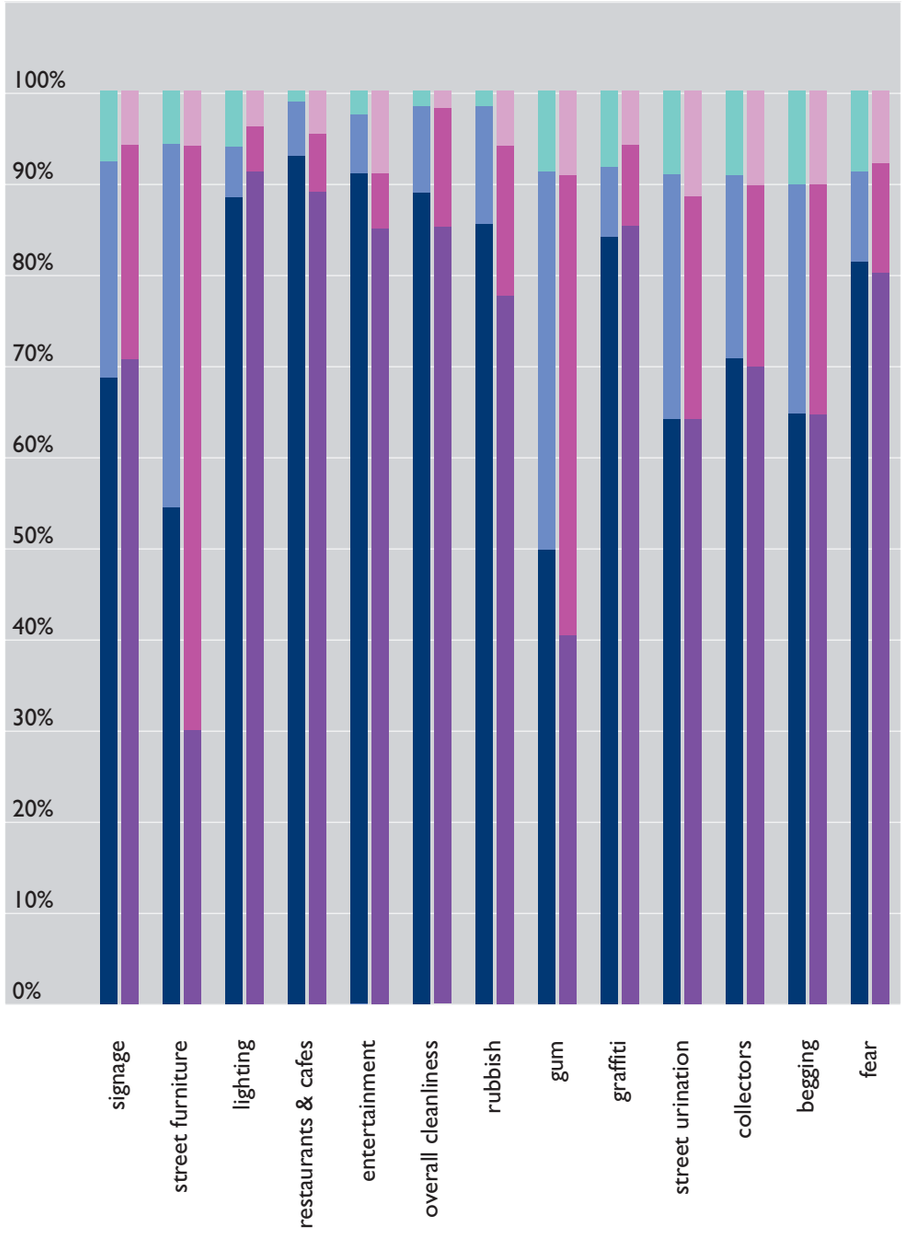
In Piccadilly Circus, 64% of those surveyed regarded levels of street furniture as unacceptable. This reflects the conflicting status of the area which is both a cross-roads and major throughway which needs to be clear and controlled, and a central meeting point. 53% of Piccadilly Circus respondents also regarded chewing gum as a major issue. No other issues were raised by more than a quarter of respondents at this location.

It is interesting to note the high proportion (22%) of people who visit Leicester Square for business purposes, compared with for other reasons. This figure reflects the large office community within the Square.

It is interesting to note that a roughly equal number (c.20%) of people expressed concerns in both locations. However, in Leicester Square these concerns were more evenly spread over a variety of issues, possibly reflecting the fact that individuals tend to spend a greater length of time outside in the Square, whereas in Piccadilly Circus, the majority of attractions are located inside.

	Acceptable	Unacceptable	Don't know
Leicester Square			
Piccadilly Circus			

Concerns of respondents - location comparison



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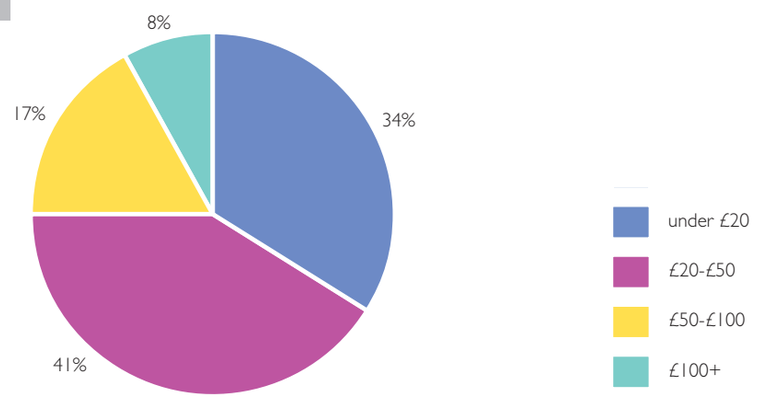
How do visitors spend their money?

The majority of respondents spent between £20 and £50 per visit to the Heart of London. The average spend in the area has increased slightly since 2005. In 2005, 79% of those surveyed spent under £50 per trip to the Heart of London. In 2007, 75% spent that amount.

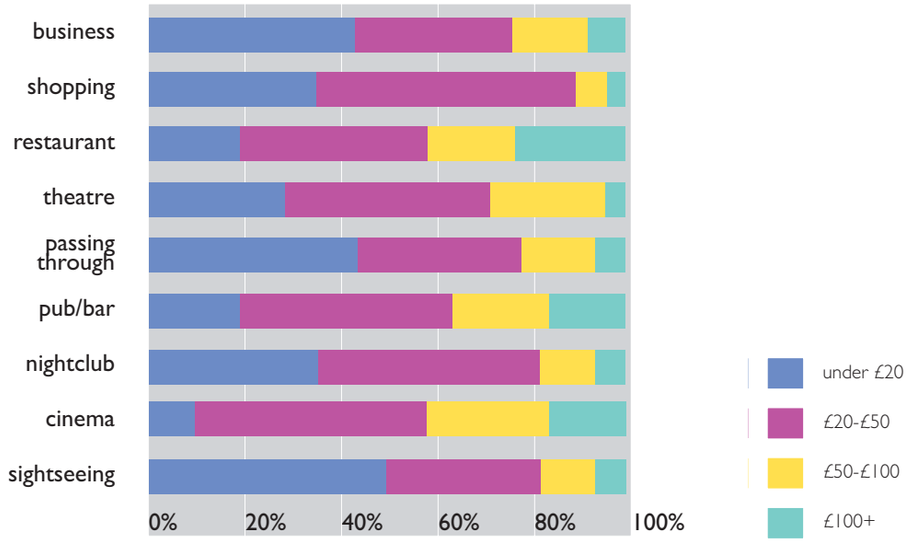
Spend per visit



Different demographics have very different spending patterns.

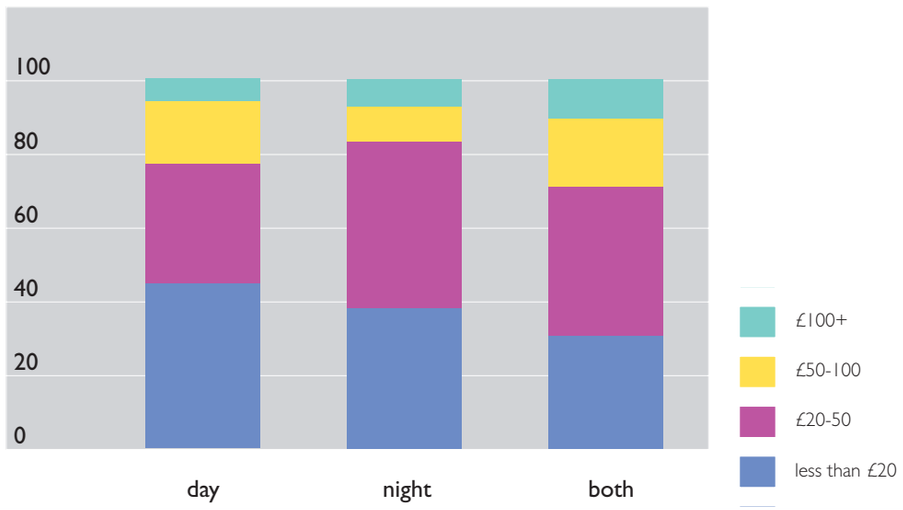
Visitors who spend the most in the area are those who are attending nightclubs (24% spend over £100), theatre (15% spend over £100) and shopping (14% spend over £100). This shows that there is a fairly large luxury product market among visitors to the Heart of London, as all these activities can be experienced for a considerably lower price elsewhere. Those who spend the least are partaking in free activities: passing through, sightseeing and business.

Purpose of visit / spend per visit



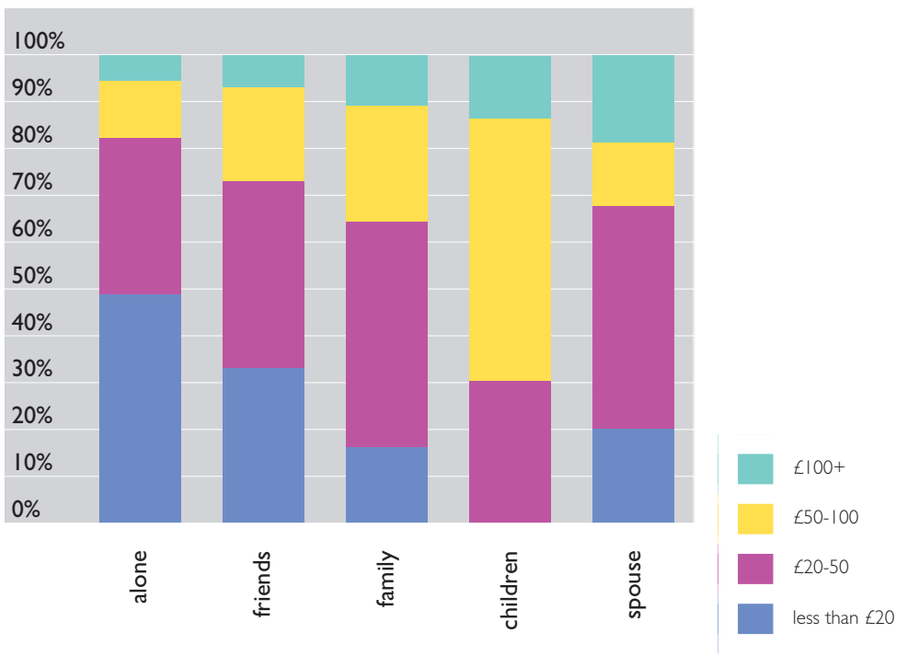
Those who visit the Heart of London during both the day and night are likely to spend the most money in the area. This may be because they are in the vicinity for a more extended period of time or they work there and therefore carry out day-to-day tasks and shopping in the area. Those who visit solely at night spend more than those who visit solely during the day. This is probably due to the fact that most night-time entertainment is inside and involves costs for food, drink and tickets.

Time of visit / spend per visit



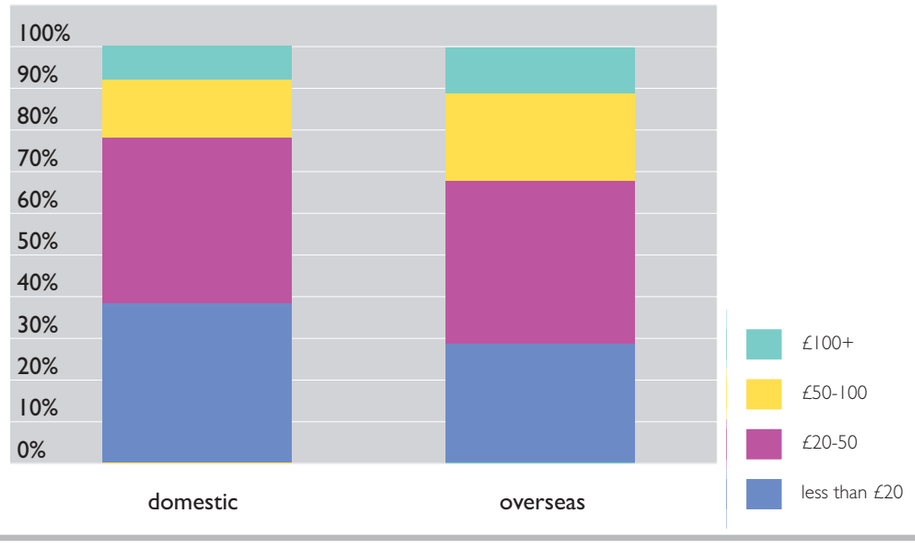
Those visiting the Heart of London alone are likely to spend the least, with 48% spending under £20. The biggest spenders are those visiting with a partner, 18% of whom spend over £100 per visit.

Visitor group status / spend per visit



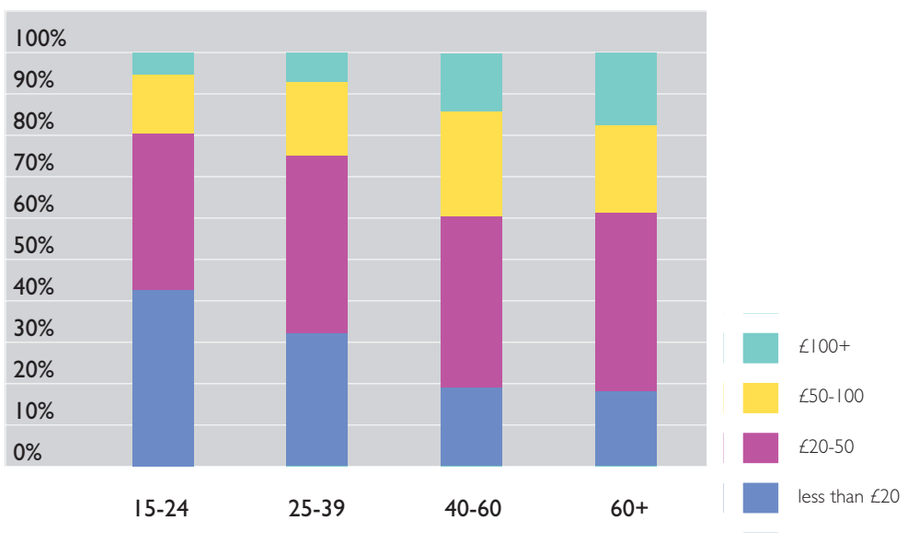
International visitors to the UK are likely to spend more than their British counterparts on a visit to the Heart of London. 29% of international and 38% of British respondents said they would spend under £20 in a visit to the area. At the same time 7% of people from the UK and 11% of internationals say they would spend over £100. There is no obvious reason for this in terms of activities both groups do in the area. However, as the majority of international visitors questioned were on holiday, it seems likely they were willing to spend more in the area due to holiday bonhomie.

Overseas / Domestic spend per visit



Unsurprisingly, 15-24 year olds spend the least of any age group, with 43% spending under £20. 18% of 60+ year olds spend over £100 per visit, whilst 38% spend more than £50. Although the oldest age group is the most likely to spend in the highest category, 40% of those aged 40-59 would spend in the top two categories, over £50. This may be because they are likely to be visiting with their families and therefore have a larger number of people to feed and pay entrance costs for.

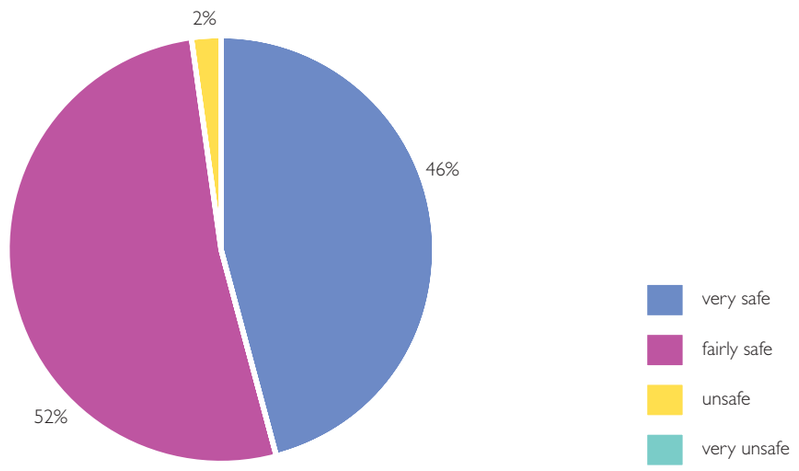
Age group / spend per visit



How safe do visitors feel?

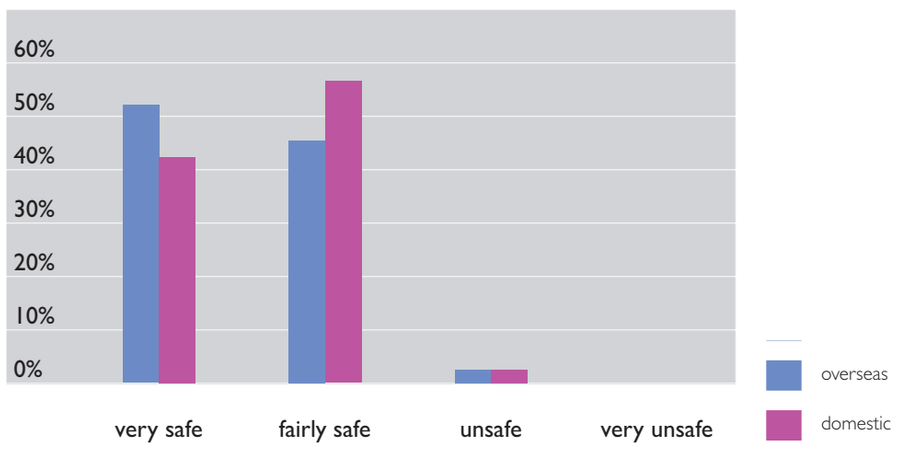
In general, people feel very safe in the Heart of London, and, over time, are feeling safer. In 2005, 38% of respondents felt very safe in the Heart of London, whereas in 2007 46% said they felt very safe. The number who feel unsafe has diminished from 4% to 2% over this period. On both occasions no respondents said they felt very unsafe, a rational outcome, as those who feel very unsafe are unlikely to visit the area.

Feeling of safety



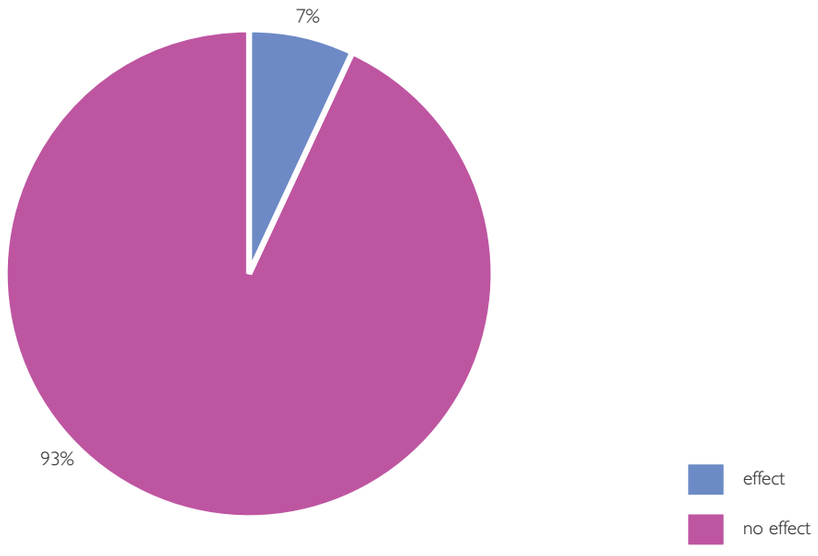
Interestingly, overseas visitors are more likely to say they feel very safe in the Heart of London, whereas the British are more likely to say they feel fairly safe. A number of things could account for this, including stereotypical British understatement, the greater likelihood that British visitors have seen stories in the news about the terrorist threat or crime levels, or the fact that a number of nationals are forced to use the area whether they feel safe or not, whilst international visitors have generally chosen to visit.

Overseas / Domestic feeling of safety



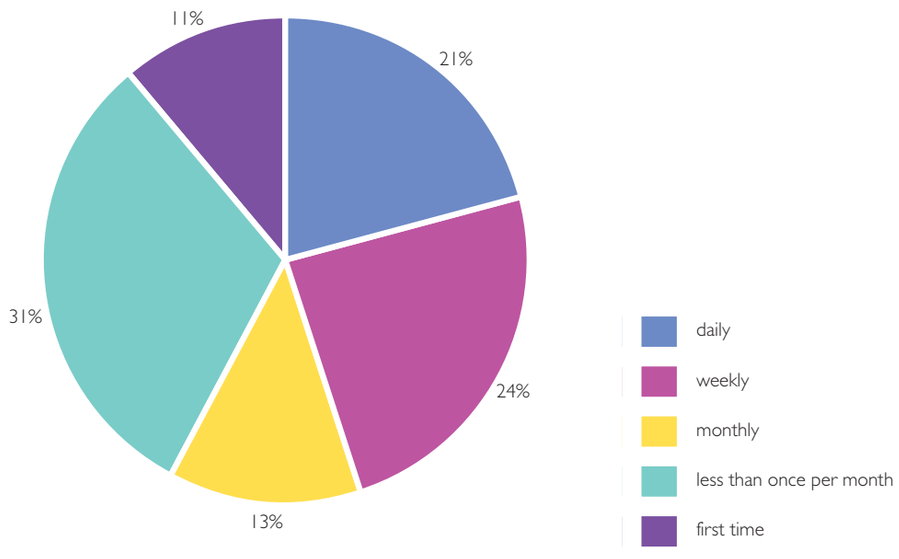
A very small number of respondents expressed any concerns over the ongoing threat of terrorism. 93% of respondents said the threat had no effect on the frequency of their visits to the Heart of London.

Current terrorism threat and its impact on frequency of visits



The 7% of respondents who expressed concerns about terrorism visit marginally more often than average. 45% visit daily or weekly, as opposed to 41% on average. Although this may seem surprising, this may be based on the fact that, as discussed above, many regular visitors do so for reasons of work and then have little choice, regardless of their concerns.

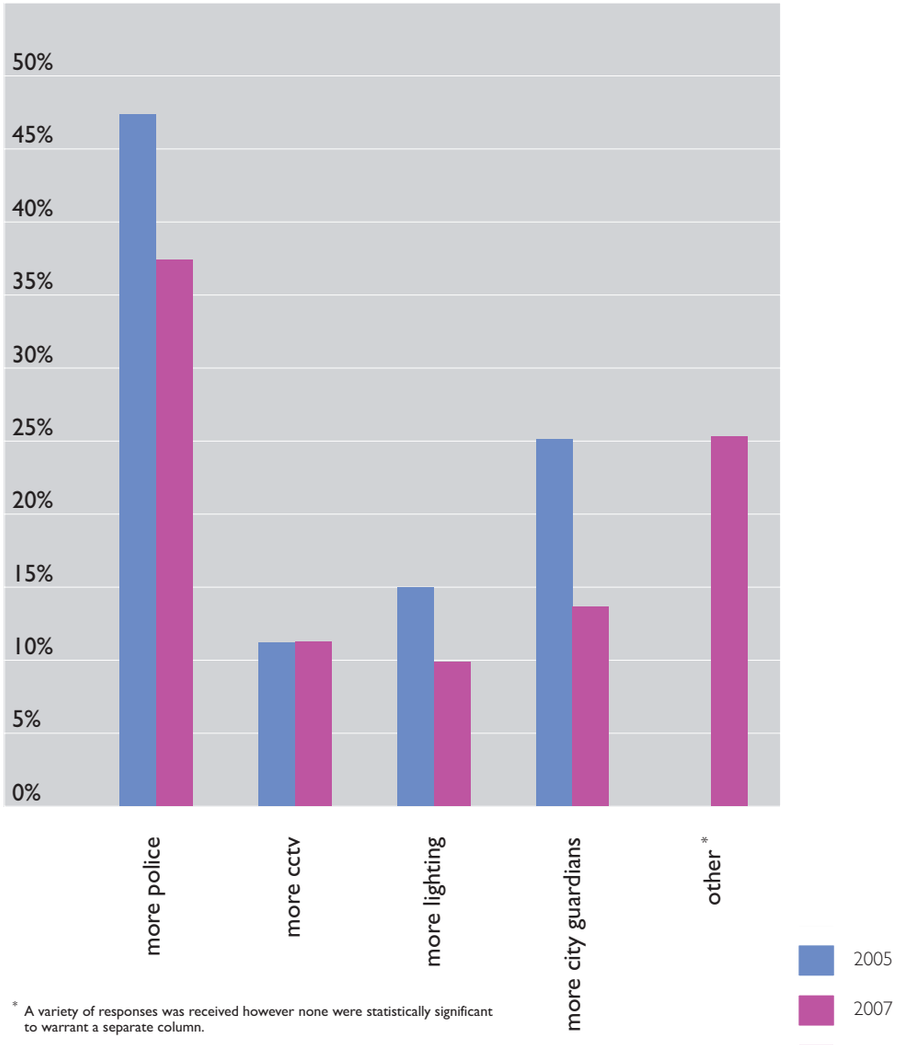
Visitor frequency



What would make visitors feel safer?

Comparing 2005 and 2007 data, there are differences in the changes which people believe would make them feel safer. Although more police remains the most popular change, numbers requesting this have diminished 9%. Similarly, numbers requesting more City Guardians and more lighting have also diminished. However, the introduction of the other category in the 2007 survey may have skewed these results, as demand for changes aside from other in 2007 was 26% lower than in 2005, whilst 26% of people selected other as their response to this question.

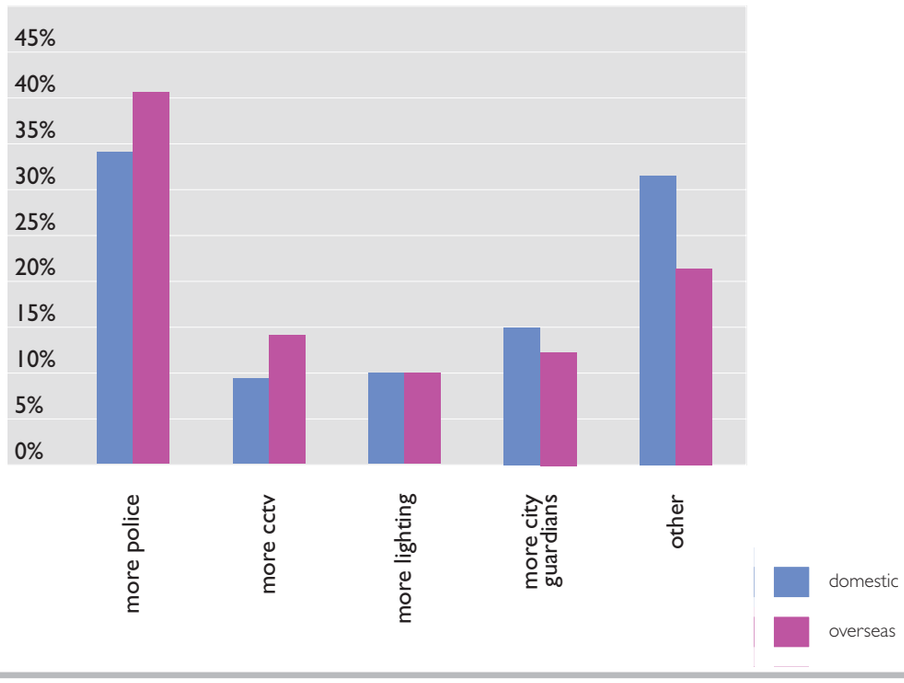
What would make respondents feel safer 2005 / 2007 comparison



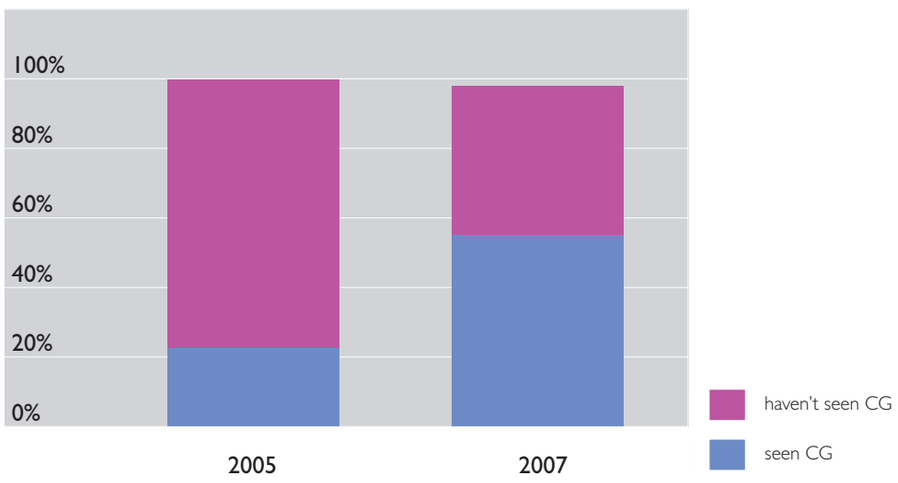
* A variety of responses was received however none were statistically significant to warrant a separate column.

International visitors are more likely than the British to request more police and CCTV to make them feel safer. There could be a number of reasons for this, including the political issue of the "surveillance state" in the UK or because police are more visible in other countries.

What would make respondents feel safer - Domestic / Overseas visitor comparison

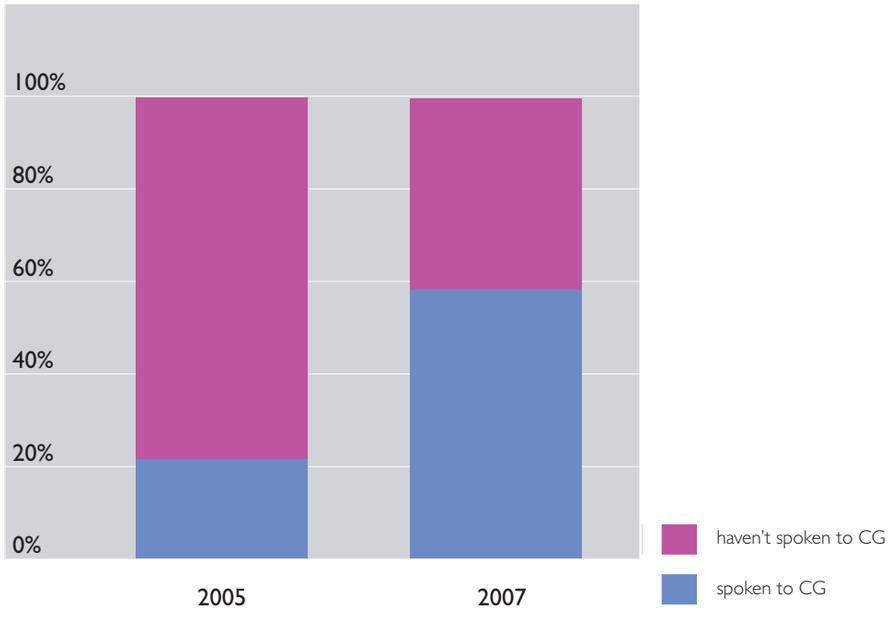


Whether the respondent had seen a City Guardian



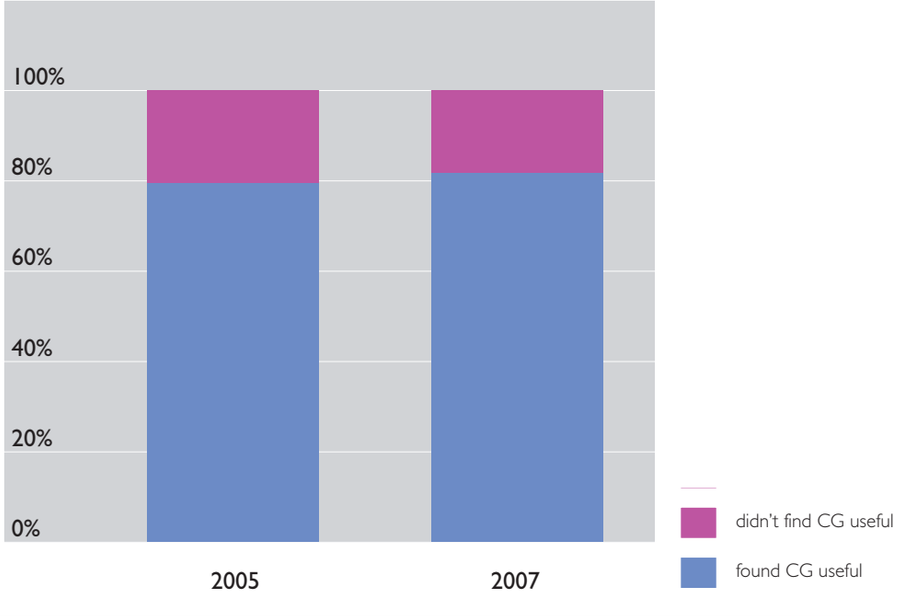
Increasing numbers of people have also spoken to City Guardians. In 2005 13% of respondents had spoken to City Guardians, whereas in 2007 22% had. However, it should be noted that the increase in numbers who had seen City Guardians between 2005 and 2007 is 245%, whilst the increase in numbers who have spoken to them is 169%. This shows that City Guardians, although more visible, may need to become more approachable, or their role may need to be better advertised to visitors.

Whether the respondent had spoken to a City Guardian



City Guardians may be more popular with the British people because they are accustomed to a more "low key" style of policing than some other nationalities, or because language issues may occur with people of other nationalities. However, this may not be the case as 92% of international visitors who have spoken to City Guardians claim to find them useful, whilst only 78% of respondents from the UK agreed. It is more likely that international visitors find City Guardians a useful source of information, but do not regard them as substitute police or security guards.

How useful the respondents found the City Guardians



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