

## RESEARCH SUMMARY

<b>Title</b>	London Visitor Segmentation
<b>Objective</b>	Identify key London visitor segments to assist in the development of the TfL Visitor Strategy
<b>Date</b>	July 2013
<b>Methodology</b>	An online survey was conducted with 2,387 visitors to London from the UK and Overseas. All visitors had been to the Capital within the past year. (Overseas included USA, France, Germany, Spain, Italy, Ireland, Netherlands, Australia, Poland, China, Brazil)

### Abstract

Six visitor segments have been identified, defined by their attitudes and behaviours when planning their trip in advance and once they have arrived in London. The segments are Tourists, Socialites, Explorers, House Guests, Focused Visitors (including 2 sub-groups) and London Enthusiasts (including 2 sub-groups). These segments were explored in terms of their marketing and commercial opportunities. Three segments were identified as having greater marketing / commercial potential: London Enthusiasts, Explorers and Tourists.

### Key findings

The three segments identified as having the most commercial/marketing potential are described below:

**London Enthusiasts** are the group most positive about London. They plan their trip both in advance and on the go using various resources. They travel in groups, stay the longest, travel around and do a lot of activities whilst in London. Active subgroup 6a do more non-ticketed activities and stay in more up market accommodation than Relaxed subgroup 6b.

**Explorers** do a lot of research 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, staying in lower cost accommodation for, on 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 such as shopping, dining out.

**Tourists** are planners who come to the Capital from overseas for a holiday, in groups and do many tourist style activities while here. They've always wanted to visit London and view it as a once in a lifetime trip and the best city for sightseeing. They tend to stay in hotels for 5 nights on average and spend large amounts while here.

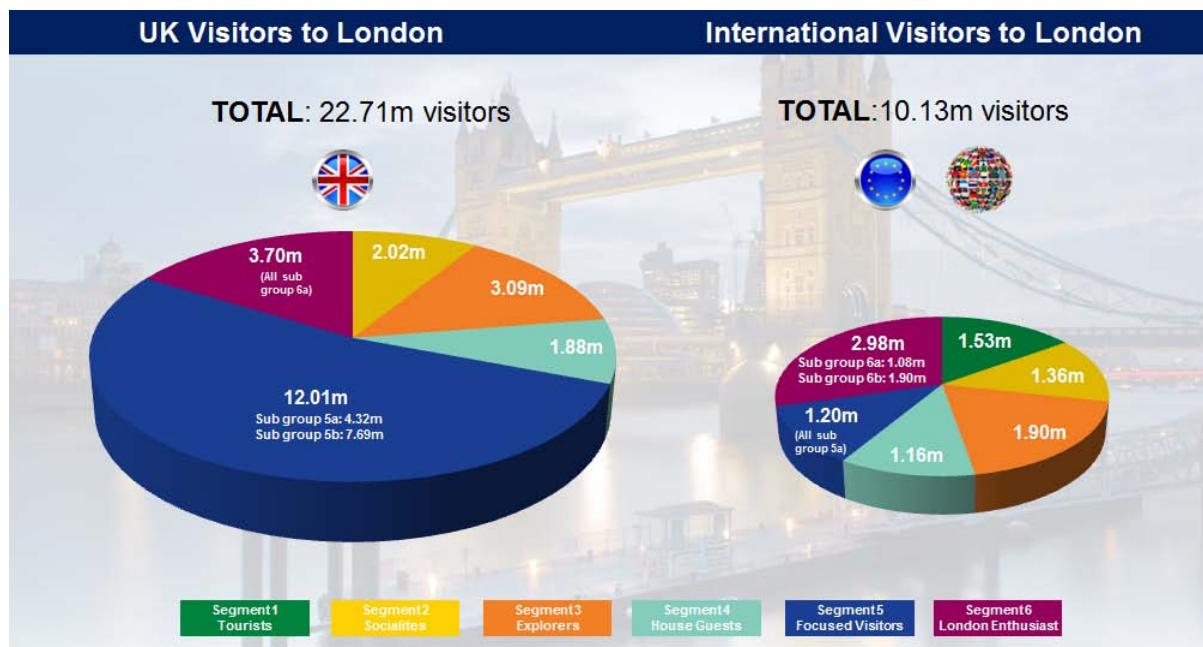
The three segments identified as having less commercial/marketing potential are described below:

**House Guests** don't plan their trip at all. They travel alone in their own vehicle to visit friends/family or for business and are frequent visitors to London. They don't spend a lot and do few activities whilst in London, staying at friends/family homes.

**Focused Visitors** plan their trip in advance, with one or two key activities 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.

**Socialites** come to London alone to visit friends/family. They do many social, non-ticketed activities whilst in London, planning on the go rather than in advance. They stay an average of six nights with friends/family and rely heavily on public transport.

An estimated breakdown of each of the segments in the UK and international visitors markets is shown below. These numbers have been estimated using a combination of the Great Britain Day Visits Survey (GBDVS) 2012, Great Britain Tourism Survey (GBTS) 2012 and the International Passenger Survey (IPS) 2012.



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