LET'S LONDON

Performance report #1 [21 June 2021]

LONDON & PARTNERS

Let’s Do London performance report

About Let’s Do London

We’re helping London to get back on its feet with a £6m recovery campaign targeting Londoners and domestic visitors. The primary objective is to increase consumer spend in central London across the leisure, retail and cultural sectors. Find out more

About this report

This report provides a summary of the visitor campaign performance plus wider London recovery trends. **The report will be fortnightly until the end of September.**

LET’S
LONDON

Performance summary

Campaign performance

- Audiences who recall the campaign **are almost 3 times as likely to have visited London** than those who did not recall the campaign
- **Intent to visit London is 17% higher** amongst those who recall the campaign, than those who did not recall the campaign
- **Confidence in visiting London is 13% higher** for those who recall the campaign compared to those who could not

London recovery trends

- **55% increase in weekday visitors** from w/c 10 May to w/c 07 June
- **Weekend visitor numbers are recovering quicker than weekdays** - 75% of 2019 compared to 54% for weekdays
- Wide variation across Central London, some areas only recovered to 30 - 40% of 2019, whereas **areas with green space or local residents had 85% or more of 2019** numbers

LET'S LONDON

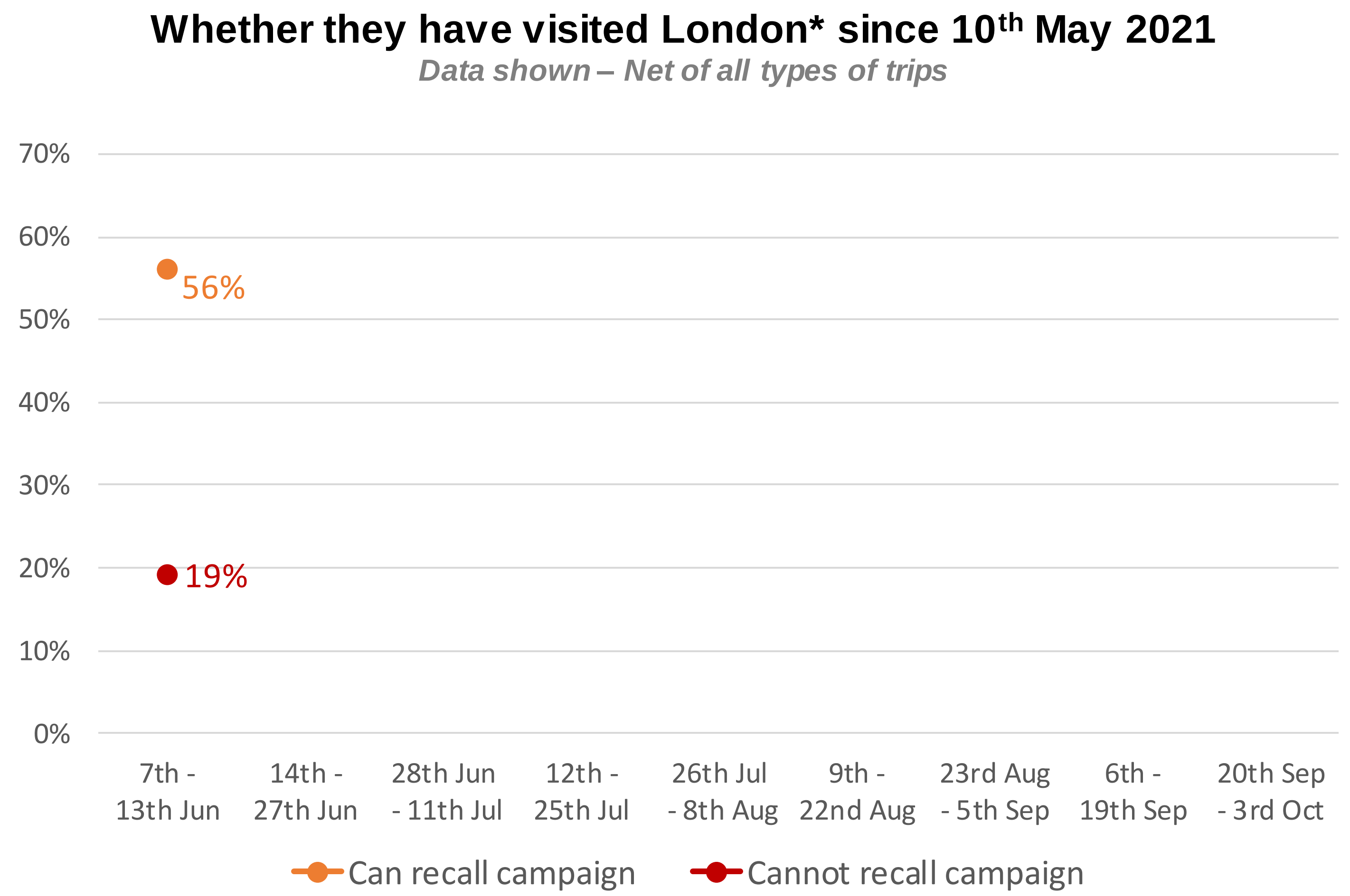
Campaign performance

Recent visits to London

A strong start to the campaign

London and domestic audiences who recall the campaign **are almost 3 times as likely to have visited London** than those who did not recall the campaign.

LET'S LONDON



For those living in Greater London, we asked whether they had taken a day out in Central London specifically and only asked for a day out rather than other types of trips.

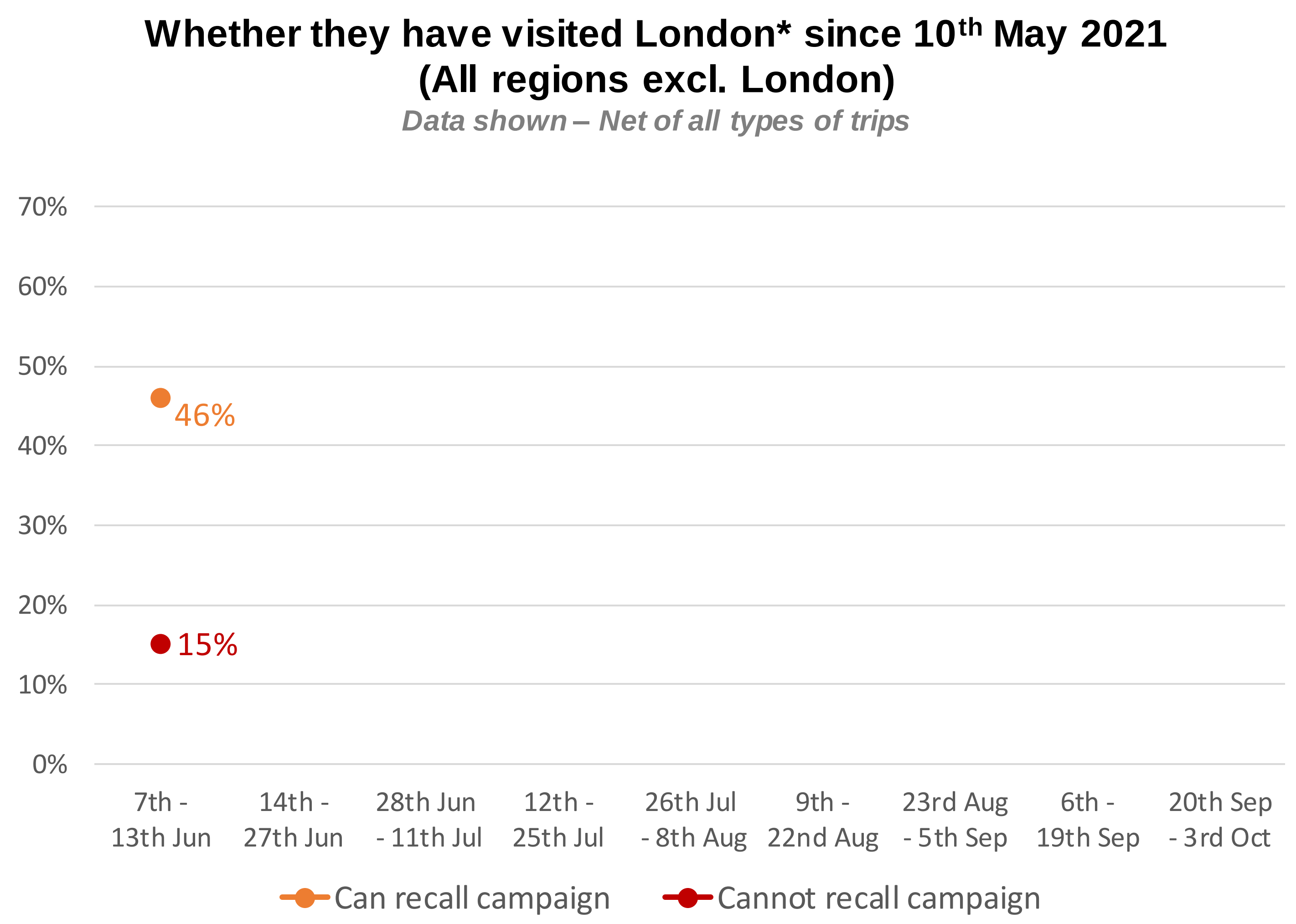
Q8. Since the 10th May 2021, how many (if any) of the following types of trips to London have you made? Data shown is net of day trip, short trip, mid-length trip or longer trip. / Q8 [Greater London only]. Since the 10th May 2021, how many (if any) of the following types of trips to Central London have you made? Londoners were only asked about days out, rather than other types of trips.
Base: All who can recall the campaign (n=178) / All who cannot recall the campaign (n=847).

Domestic visits
(excluding Londoners)

It is a similar picture when only looking at audiences outside of London.

Audiences outside of London who recall the campaign **are 3 times as likely to have visited London** than those who did not recall the campaign.

LET'S LONDON



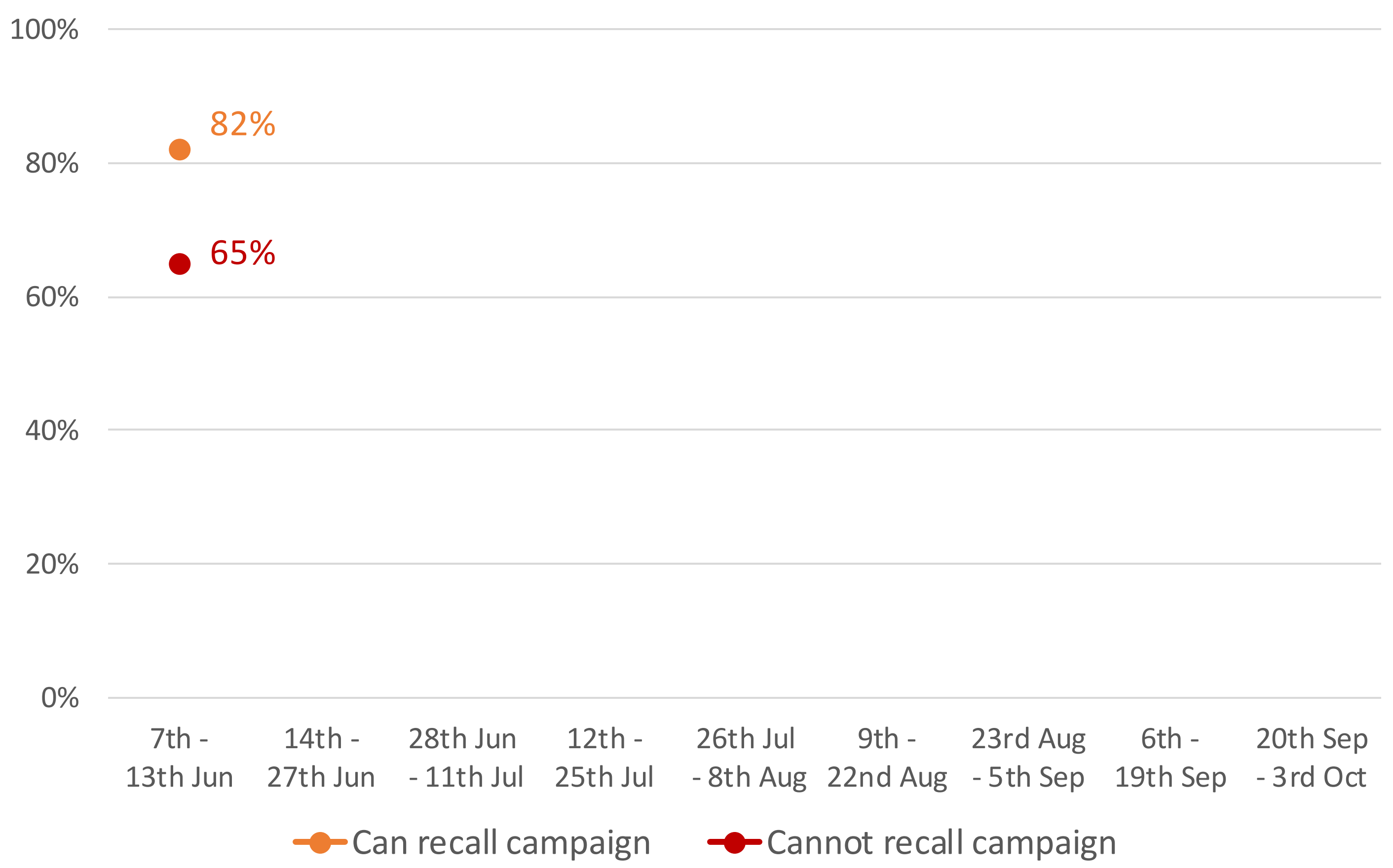
Q8. Since the 10th May 2021, how many (if any) of the following types of trips to London have you made? Data shown is net of day trip, short trip, mid-length trip or longer trip.
Base: All regions excl. London – those who can recall the campaign (n=119) / those who cannot recall the campaign (n=703).

Intentions to visit London

Intent to visit London in the next year amongst all audiences **is 17% higher** amongst those who recall the campaign than those who did not recall the campaign

LET'S LONDON

Whether they intend to visit* in the next year

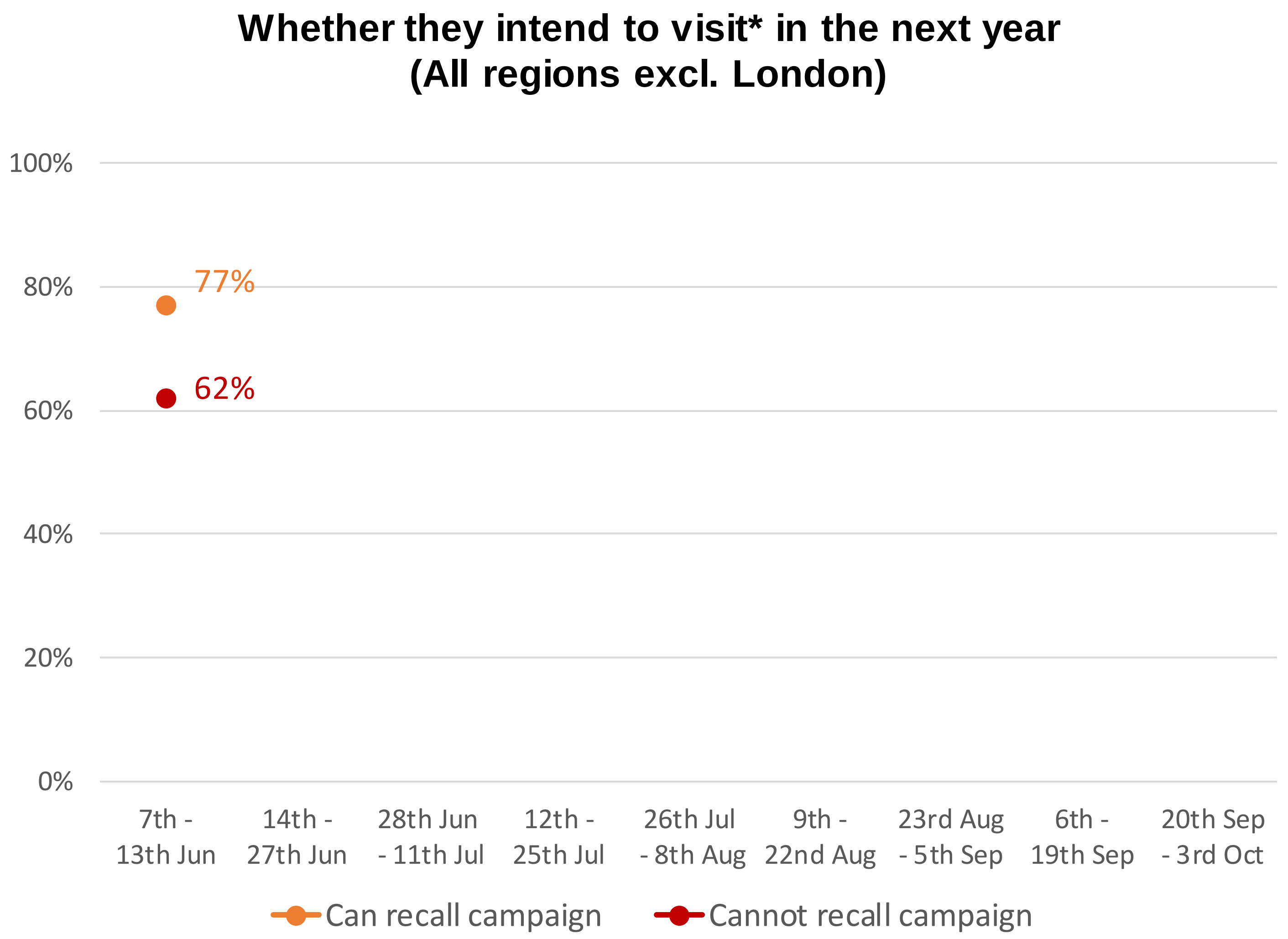


For those living in Greater London, we asked if they intend to take a day out in Central London specifically and only asked for a day out rather than other types of trips.

Q9. Within the next year, do you intend to take any of the following types of trips to London? Data shown is net of day trip, short trip, mid-length trip or longer trip. / Q9 [Greater London only]. Within the next year, do you intend to take any of the following types of trips to Central London? Londoners were only asked about days out, rather than other types of trips.
Base: All who can recall the campaign (n=178) / All who cannot recall the campaign (n=847).

Domestic intent
(excluding Londoners)

Amongst those living outside of London, **intent to visit is 15% higher** amongst those who recall the campaign than those who did not recall the campaign



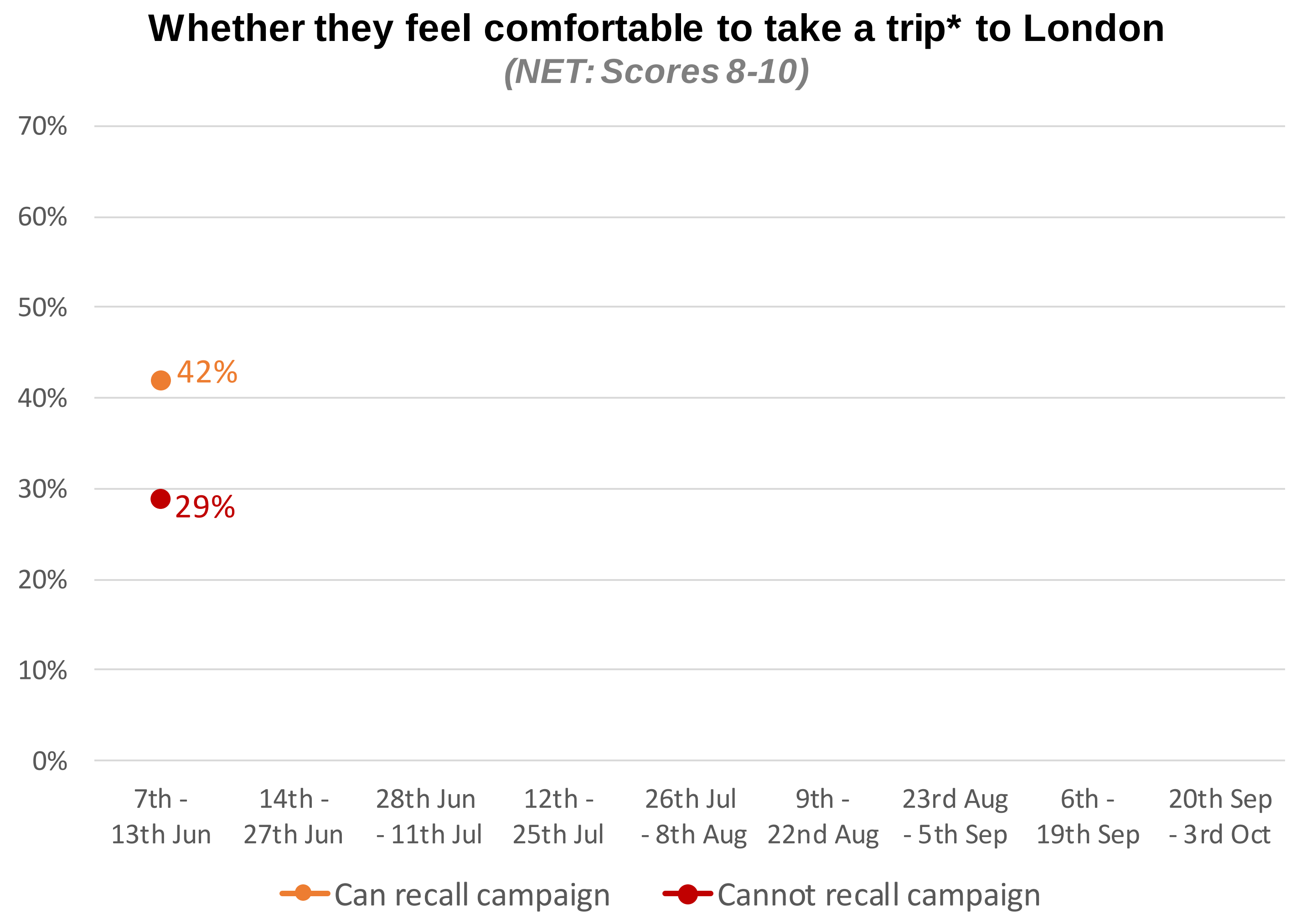
LET'S LONDON

Q9. Within the next year, do you intend to take any of the following types of trips to London? Data shown is net of day trip, short trip, mid-length trip or longer trip.
Base: All regions excl. London – those who can recall the campaign (n=119) / those who cannot recall the campaign (n=703).

Confidence to visit London

Confidence in visiting London is 13% higher for those who recall the campaign compared to those who could not

LET'S LONDON

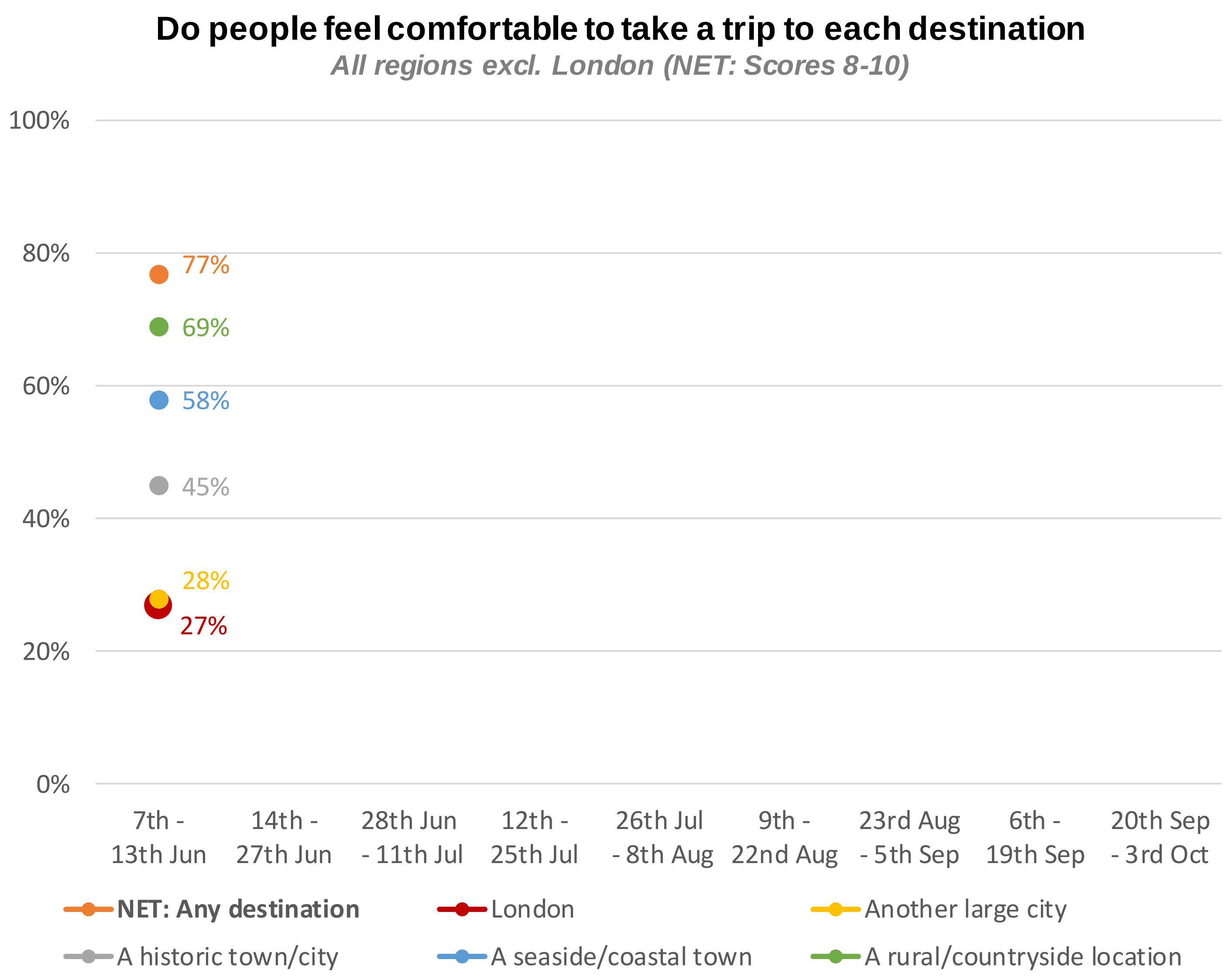


**For those living in Greater London, we asked how comfortable they felt to take a day out in Central London specifically.*

Q7. On a scale of 1 to 10, how comfortable do you feel about taking a trip or short break in the next 2 months to each of the following? – London [data shown = net of scores 8-10]? / Q7 [Greater London only]. On a scale of 1 to 10, how comfortable do you feel about taking a day out in the next 2 months to each of the following? – London [data shown = net of scores 8-10]?
Base: All who can recall the campaign (n=178) / All who cannot recall the campaign (n=847) / All regions excl. Greater London (n=822) / Greater London (n=203).

Domestic travel confidence

- **High confidence to take a domestic trip to any location** (77%). This will be a key measure we monitor to understand any impact of the recent delay to the lockdown roadmap
- **Less confidence in visiting London** compared to other destination types



LET'S LONDON

Q7. On a scale of 1 to 10, how comfortable do you feel about taking a trip or short break in the next 2 months to each of the following? Data shown = net of scores 8-10? / Q7 [Greater London only]. On a scale of 1 to 10, how comfortable do you feel about taking a day out in the next 2 months to each of the following? Data shown = net of scores 8-10
Base: All regions excl. Greater London (n=822) / Greater London (n=203).

Campaign recall

Campaign recall levels are higher for those living in London than those who do not.

Non-London recall is expected to increase once the national TV campaign begins w/c 21 June.

LET'S DO LONDON

Q13. Have you seen or heard any advertising or other communications about visiting London? / Q14. Where (if at all) have you seen or heard any of these adverts, or anything related to 'Let's Do London'? – Data shown is a net of any campaign channel selected. Base: All regions excl. Greater London (n=822) / Greater London (n=203).

Channel performance

Early indicators on social media channels show stronger performance with audiences:

- Without children
- Specific regions: W. Midlands, N. West, S. West, Scotland & Yorkshire
- 35 - 45 year-olds

This aligns with the profile of pre-pandemic overnight visitors to London.

LET'S LONDON

Total campaign reach of 36% with a frequency of 4*

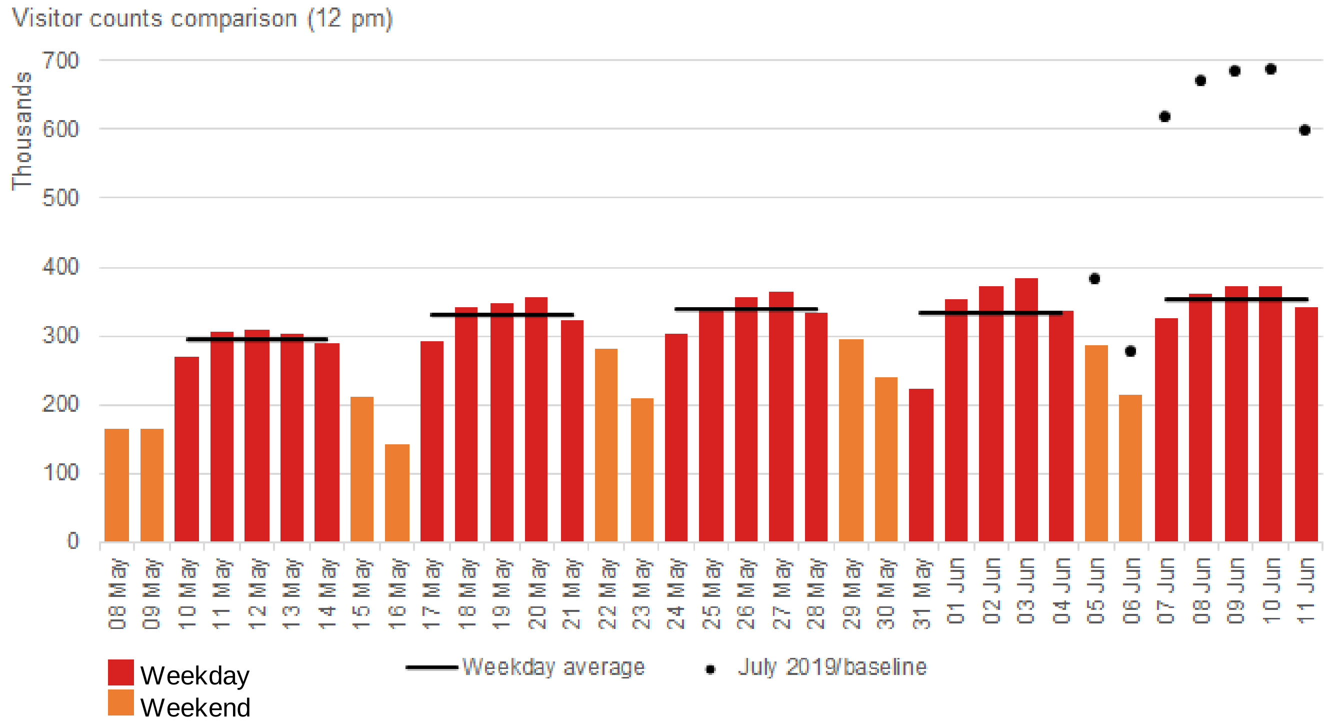
- **PR: 1,000** domestic articles
- **Radio:** 37,000 plays nationwide, with 10m engagements**
- **Digital and social media channels**: 10 million reach
- **#LetsDoLondon hashtag:** 1.5 million engagements
- **Engaging content - completed video views:** 43% vs benchmark of 32%
- **TV campaign** begins w/c 21 June.

*Estimation based on activity delivered to date, tracking against planned R&F
** Engagements = estimated number of people who heard 100% of the ad

London recovery trends

Day time visits

- **55% increase in weekday visitors** from w/c 10 May to w/c 07 June
- **Weekend visitors recovering quickest** at around 75% of 2019 baseline
- **Weekday visitors recovering more slowly** at around 54%

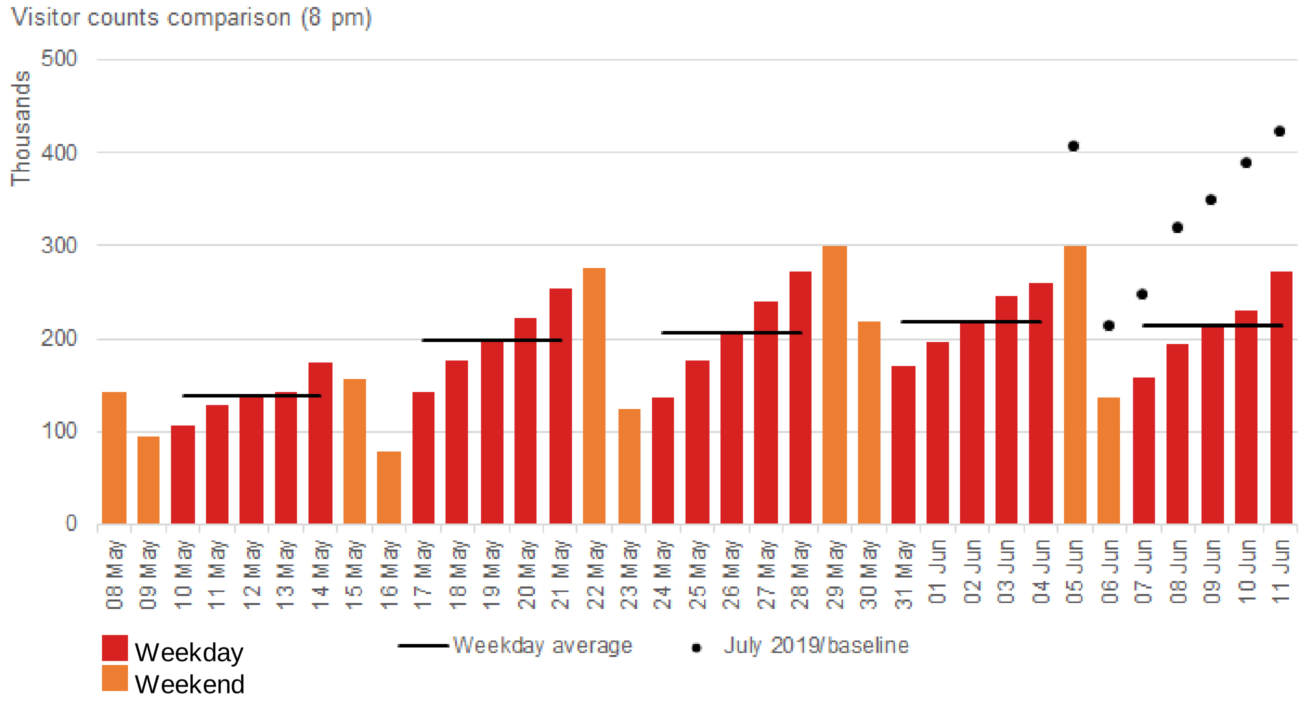


LET'S LONDON

Anonymised and Aggregated data from O2. Data shown is based on O2 customers, expanded for UK residential population

Evening visits

- Evening visits grow from Monday through to Saturday
- **20% increase in weekday evening average visitors** from w/c 10 May to w/c 07 June - growth has since plateaued
- **Saturday evenings have the strongest recovery** (around 73%); rest of week average 62% of usual visitor numbers

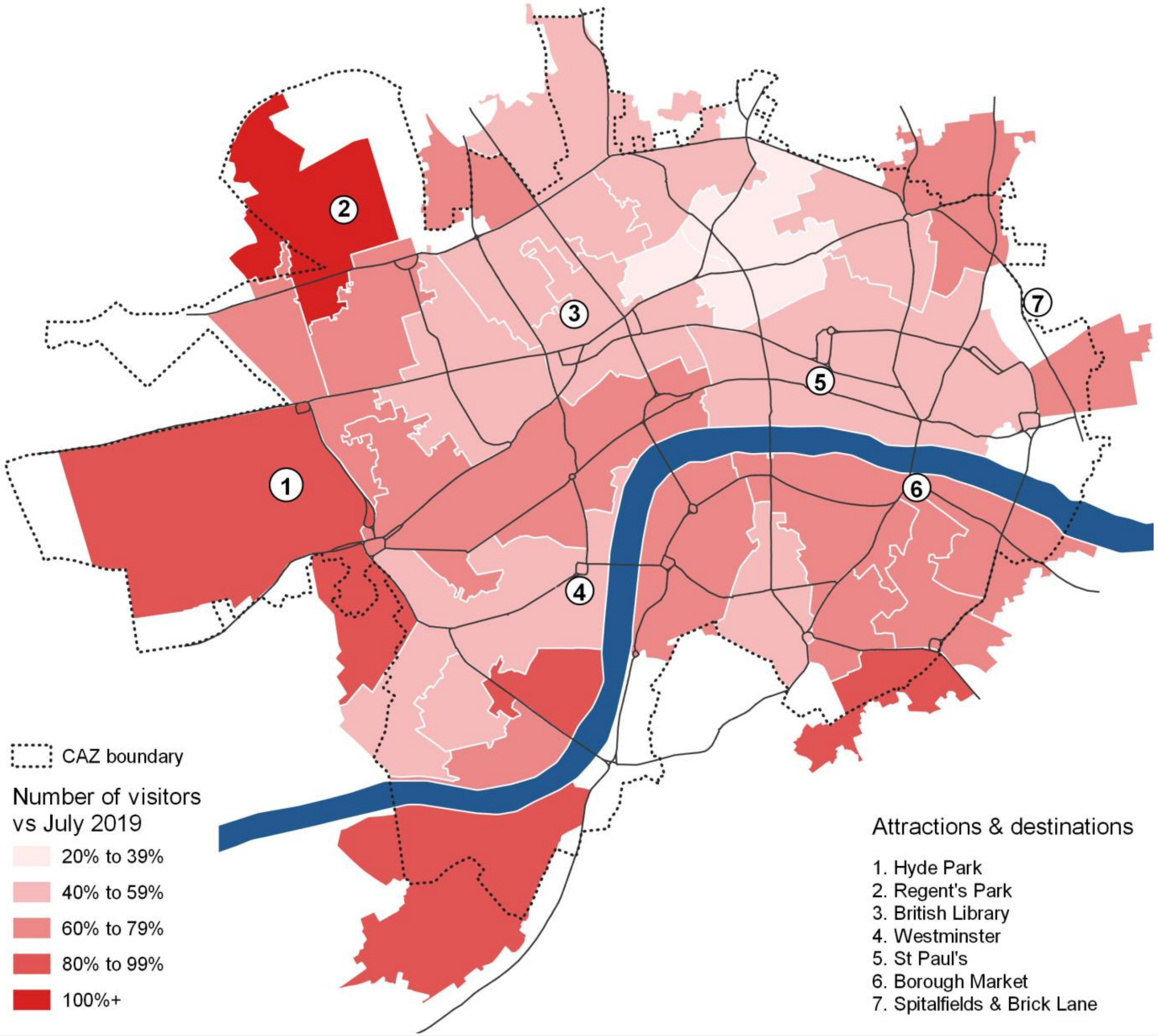


LET'S LONDON

Anonymised and Aggregated data from O2. Data shown is based on O2 customers, expanded for UK residential population

Day time visits

- **Areas with green space are recovering the fastest**, as well as areas with perhaps more of a residential leaning
- Lowest recovery areas are around Clerkenwell

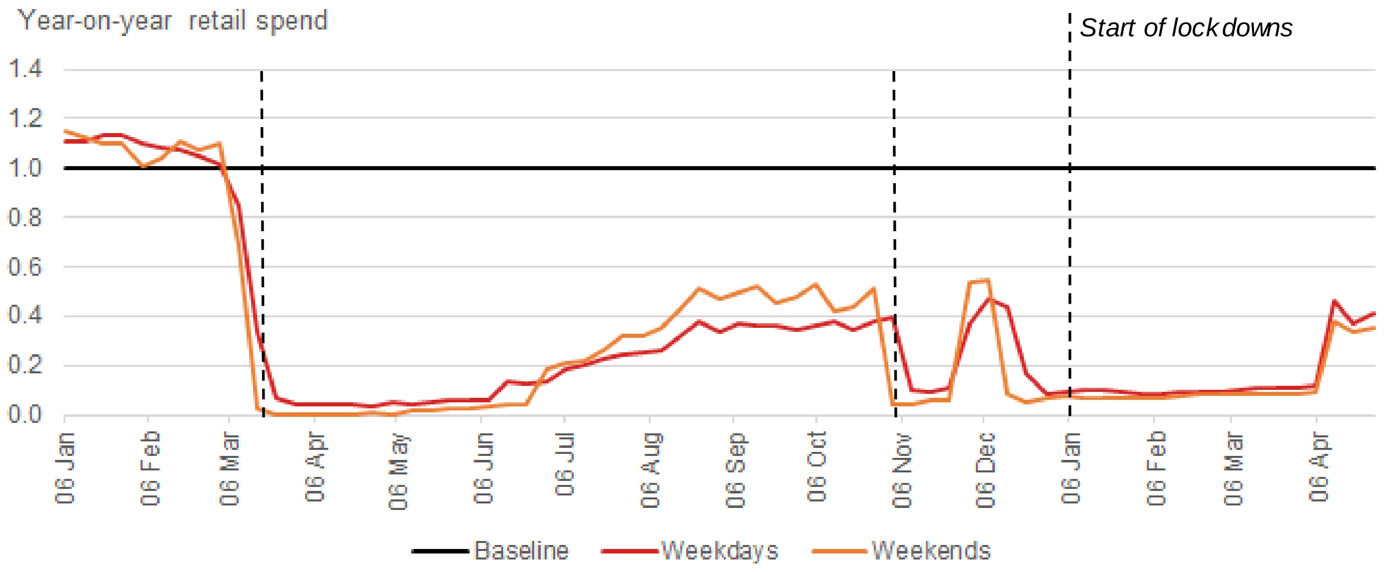


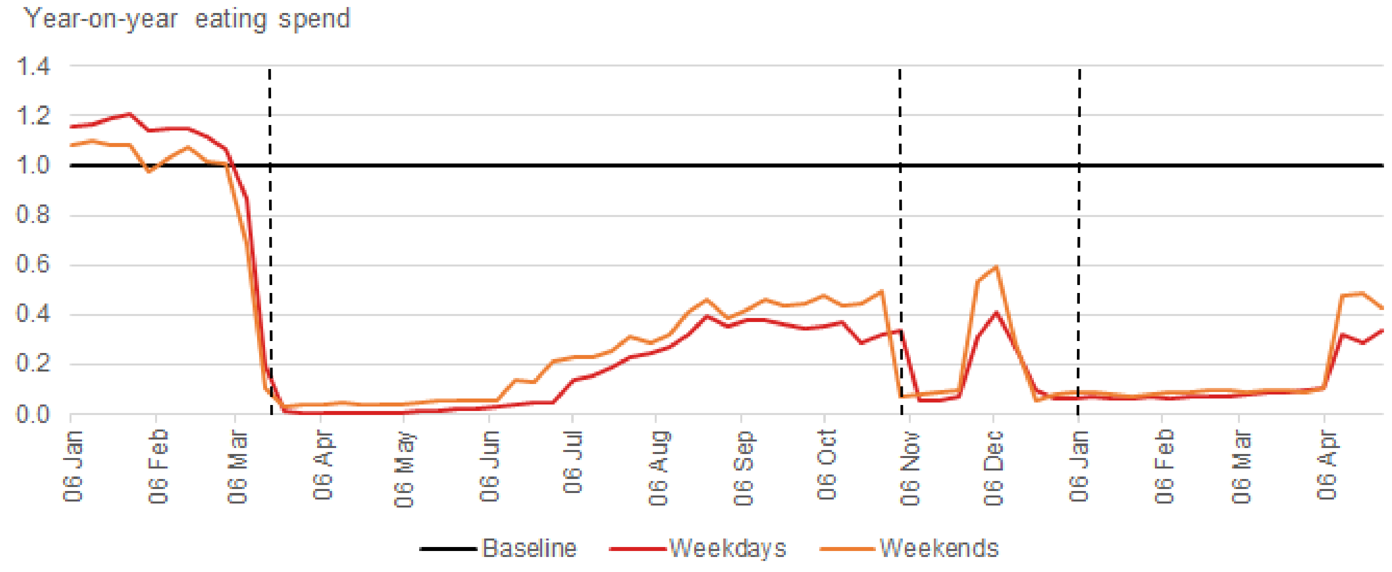
LET'S LONDON

Visitors w/c 29 May vs July 2019. Anonymised and Aggregated data from O2. Data shown is based on O2 customers, expanded for UK residential population

Spend

- **Spend in central London is down c.60%** compared to 2019
- During the first few weeks after the 12 April reopening, spend reached similar levels to the pandemic peaks in late summer and early winter 2020



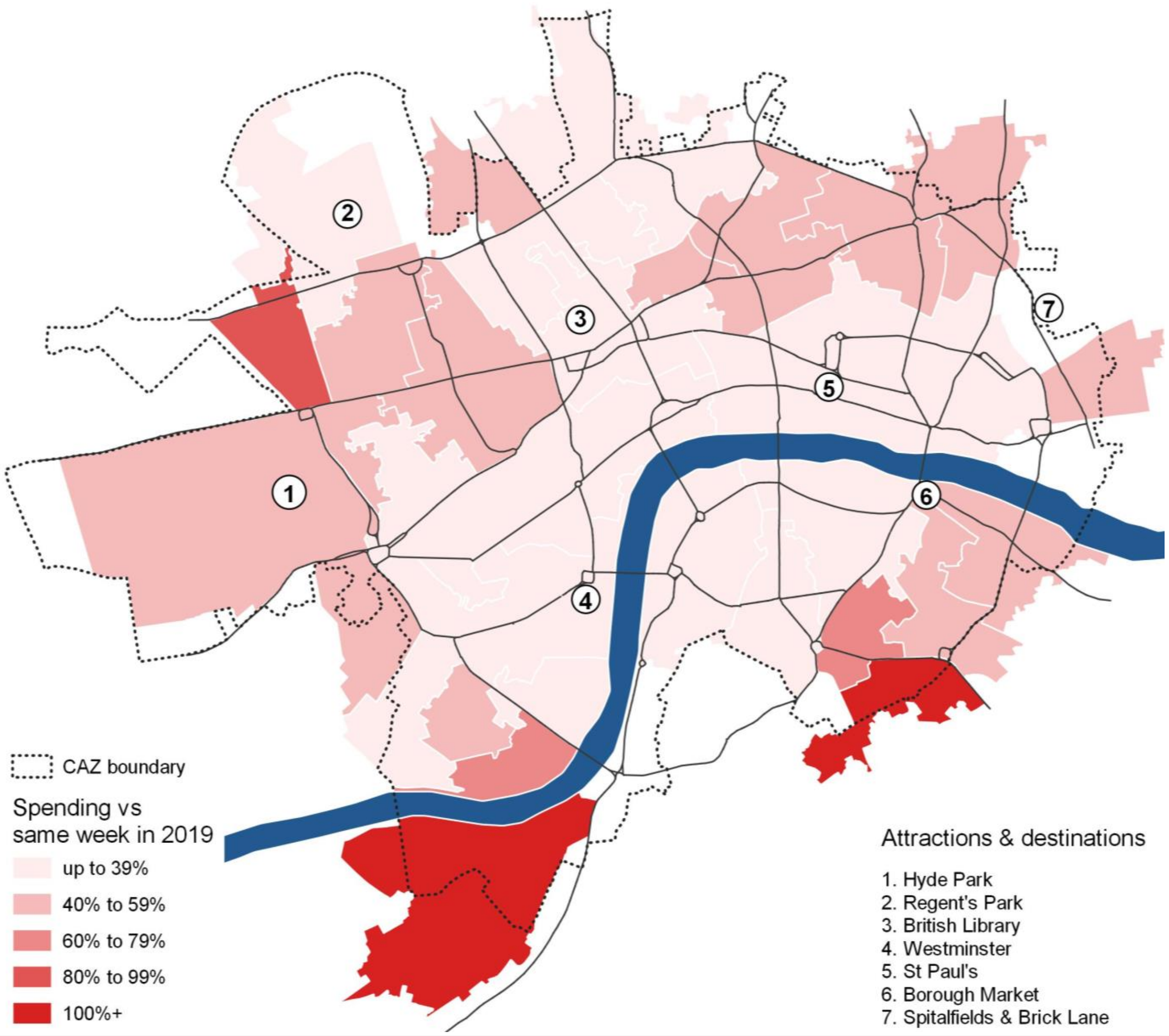


LET'S LONDON

Anonymised and Aggregated data from Mastercard. Data captures card spend in 'bricks and mortar' establishments, rather than online.

Spending

Areas with the highest spending recovery coincide with major development sites at Nine Elms and Elephant & Castle. New residents may be responsible for high spend relative to 2019.

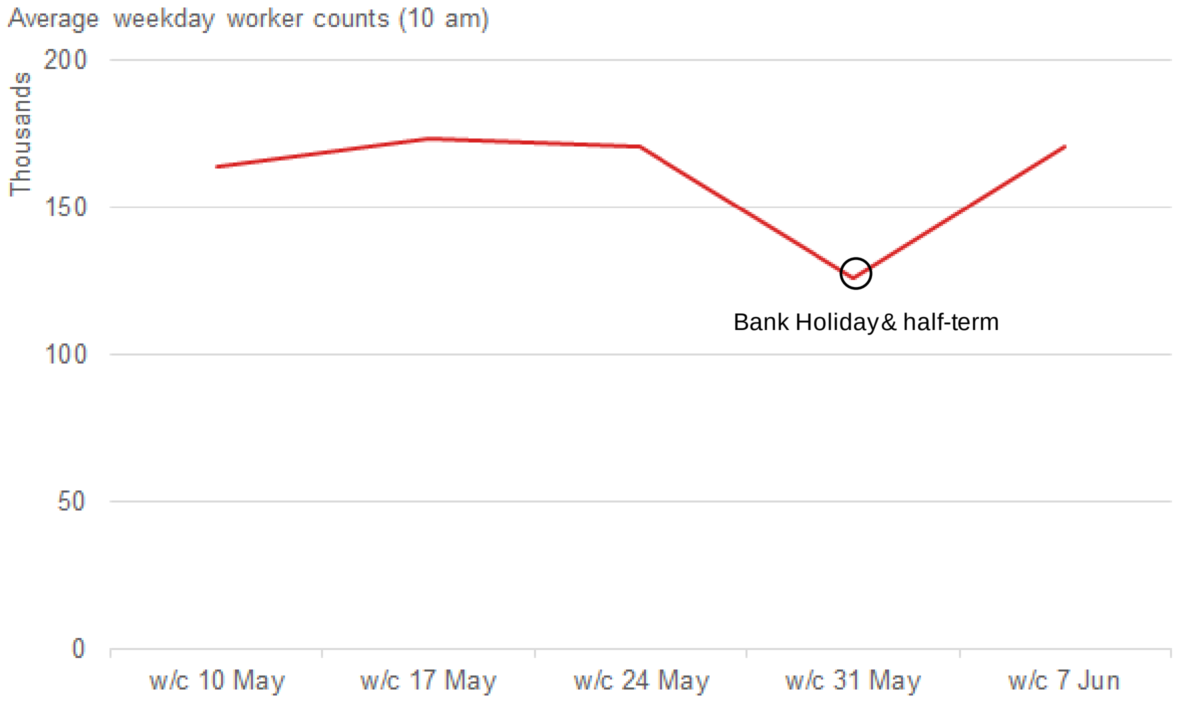


LET'S LONDON

Anonymised and Aggregated data from Mastercard. Data captures card spend in 'bricks and mortar' establishments, rather than online.

Daytime workers

- **Weekend workers** have returned at around 75% of their baseline numbers
- **Weekday workers are at 30% of usual** and are not increasing week on week as restrictions require people ‘to work from home where they can’

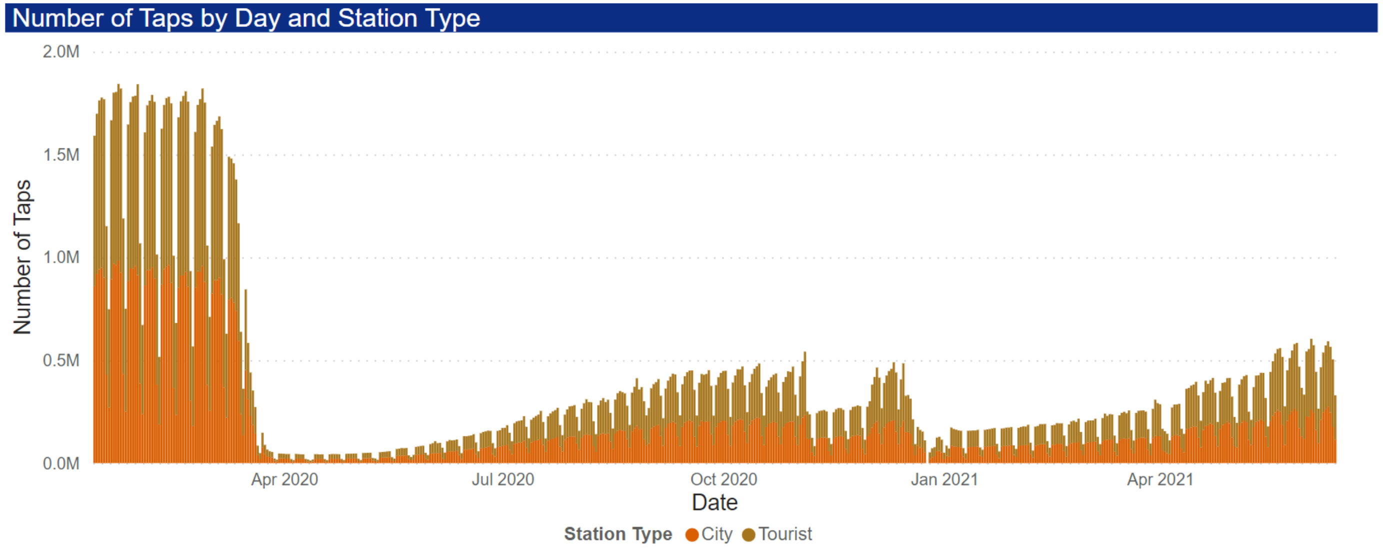


LET’S LONDON

Anonymised and Aggregated data from O2. Data shown is based on O2 customers, expanded for UK residential population.

TfL tube ridership

- **Central London Tube travel c.33%** of pre-pandemic levels
- Tube journeys confirm a similar pattern to the mobile phone footfall data



LET'S LONDON

TfL is able to take data from its ticketing system (Oyster & Contactless Payment Card taps) to provide an indication of how customers are travelling. The overall numbers are filtered just to the 32 stations defined as 'City' and as 'Tourist'. These counts won't include paper tickets or times when the barriers are kept open.

Find out more and get involved

Sign up for email alerts and discover more about Let’s Do London:

www.londonandpartners.com/letsdolondon

This report is fortnightly

LET’S LONDON

Appendix: methodology & data sources

Campaign evaluation

- Exposed and control group survey
- Exposed based on campaign recall
- Sample size of 500 every week from key UK regions

O2 Person Counts

- O2 customers (~35% multiplied up to UK population)
- Workers and Residents defined using patterns of behaviour, visitors are people at neither
- Anonymised and aggregated

Mastercard Retail Index

- On-premises card transactions
- Weekly values (split weekdays / weekends)
- Anonymised and aggregated

Tube demand

- TfL network demand dashboard

LET'S LONDON

Leading London's recovery

The Mayor of London and London & Partners are working with the city's tourism industry to deliver Let's Do London

LONDON & PARTNERS

MAYOR OF LONDON

Transport for London

GREATER LONDON AUTHORITY

London Tourism Recovery Board

London Workplace Recovery Board

Central London Forward

Working closely with industry

And many, many more: Barbican, British Library, Design Museum, Imperial War Museums, Heathrow Airport, London Tourism Cooperative, Park Plaza Hotels & Resorts, Royal Academy of Arts, Somerset House, Whitbread… and many more!

FIND OUT MORE

www.londonandpartners.com/letsdolondon

LONDON
& PARTNERS