GREATER**LONDON**AUTHORITY

(by email)

Our reference: MGLA070725-9507

4 August 2025

Dear

Thank you for your request for information which the Greater London Authority (GLA) received on 7 July 2025. Your request has been considered under the Freedom of Information Act (FOI) 2000.

You requested:

> Under the Freedom of Information Act 2000, I am requesting the following information regarding the Let's Do London promotional campaign:
>
> 1. The total amount spent on the campaign each year, including both budgeted and actual spend.
> 2. Any post-campaign evaluation or impact assessment reports, including metrics used and whether targets were met.

Our response to your request is as follows:

1. The total Let's Do London campaign funding for each of the financial years listed:

    - 2021-2022 Campaign Funding = £4,169,000
    - 2022-2023 Campaign Funding = £10,541,666
    - 2023-2024 Campaign Funding = £2,860,000

2. Please find attached:

    - Economic impact evaluation methodology for the "Let's do London" domestic tourism campaign (2021)
    - Performance report #8 (27 September 2021)
    - Campaign performance to date (20 October 2022)
    - France & Germany Campaign Report (2023)
    - Let's Do London campaign - 2022 final results (Email chain to Senior Management team dated 10 January 2023)

If you have any further questions relating to this matter, please contact me, quoting the reference MGLA070725-9507

Yours sincerely

Information Governance Officer

If you are unhappy with the way the GLA has handled your request, you may complain using the GLA's FOI complaints and internal review procedure, available at:
https://www.london.gov.uk/about-us/governance-and-spending/sharing-our-information/freedom-information

Economic impact evaluation methodology for the "Let's do London" domestic tourism campaign

1. Background

The "Let's do London" paid media campaign ran from 10 May 2021 to 30 September 2021 with the purpose of attracting domestic, British leisure tourists to London. The campaign was targeted 18-65 year old people from Scotland and England excluding the South-West. The campaign was launched through radio, online, physical posters, TV, and PR. The purpose of the economic impact evaluation is to understand any additional tourism spend that can be attributed to the campaign.

2. Evaluation methodology

The economic impact evaluation is based on a survey amongst people in the targeted demographical group with 10,160 responses. The survey results are generalised to the targeted population. The survey data has been supplemented by data from VisitBritain's "Great Britain Tourism Survey". Table 1 shows each factor in the model and its data source.

Table 1. Model input			
	Model factor	**Level**	**Source**
A	Targeted population	29m	ONS
B	Share seen campaign and booked	1.5%	Survey
C	Additionality	15%	London & Partners survey benchmark
D	Ave. length of stay	2.3	Great Britain Tourism Survey, VisitBritain
E	Ave. spend per day	£107	Survey
F	Ave. party size	3.1	Great Britain Tourism Survey, VisitBritain
G	Share seen and intending a visit	2.7%	Survey
F	Likelihood the trip will happen	21%	London & Partners survey benchmark
H	Campaign costs	£3.865m	London & Partners

3. Provisional results[1]

The calculation of additional spend in London is done as follows:

Additional spend = A*B*C*D*E*F + A*(1-B)*C*D*E*F*G*F = **£70m**

ROI = £70m/£3.865m = **18**

ROI includes return on total funding (GLA and industry contributions).

4. CAZ results

Additional spend in the CAZ is calculated as 60% of the estimated additional spend by non-Londoners'[2] plus an estimate of additional spend in the CAZ by Londoners who don't live in the CAZ, which follows the steps in section 3 but only for Londoners.

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[1] Numbers in this note are provisional as not all data has been reported back at the time of writing.

[2] "Lost worker vs. tourism expenditure in the Central Activities Zone (CAZ)", GLA Economics (2020): https://airdrive-secure.s3-eu-west-1.amazonaws.com/london/dataset/lost-worker-tourism-expenditure-caz/2020-10-23T09%3A37%3A14/CAZ%20Analysis%20Briefing%20Note-final.pdf?X-Amz-Algorithm=AWS4-HMAC-SHA256&X-Amz-Credential=AKIAJJDIMAIVZJDICKHA%2F20210930%2Feu-west-1%2Fs3%2Faws4_request&X-Amz-Date=20210930T144547Z&X-Amz-Expires=300&X-Amz-Signature=d43ee83ac911cec059b34c71c80fa0aa36e2bc3c4fbcfd78be50bf565304ff0f&X-Amz-SignedHeaders=host

Additional spend in the CAZ = £58m

ROI based on CAZ only = 15

CAZ total	**£**	**58,400,978**
CAZ spend excl. Londoners	£	41,727,513
CAZ spend by Londoners	£	16,673,464

LET'S LONDON

Performance report #8 27 September 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.**

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Performance summary

Campaign performance

- Amongst those who recall the campaign, **two-thirds have visited London** since the 10 May 2021, **the highest since reporting began.**
- **Domestic audiences** are **2.5 times more likely to have visited London** than those that cannot recall the campaign
- **Intention to visit London in the short term remains high at three-fifths intending to visit** for those recalling the campaign.
- **Confidence in visiting London has increased to the highest level since reporting began** for those recalling the campaign.
- Recall continues to strengthen **in Greater London, almost half recall the campaign.** Out of Home advertising is driving recall.

London recovery trends

- **Daytime visits continue to climb during the week** with numbers nearing 500k or 75% of pre-pandemic levels . This is 19% higher than w/c 23 Aug.
- **Weekend visits are increasing and now at around 92% of pre-pandemic levels.**
- **Evening footfall has more than doubled** since early May (111% increase), with **the most recent week the busiest yet** (83% pre-pandemic).
- **Evening visits grow from Monday through to Saturday**
- **Spend in central London is at 80% or higher** compared to 2019. It is **led by weekend eating and** has **climbed steadily throughout the school holidays.**

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Campaign performance

Recent visits to London

Amongst those who can recall the campaign, two-thirds have visited London since the 10th May 2021, the highest since reporting began.

They are more than twice as likely to have visited than those who cannot recall the campaign.

Amongst those who cannot recall the campaign, the proportion who have visited London sees a continued directional increase since the 9th August.

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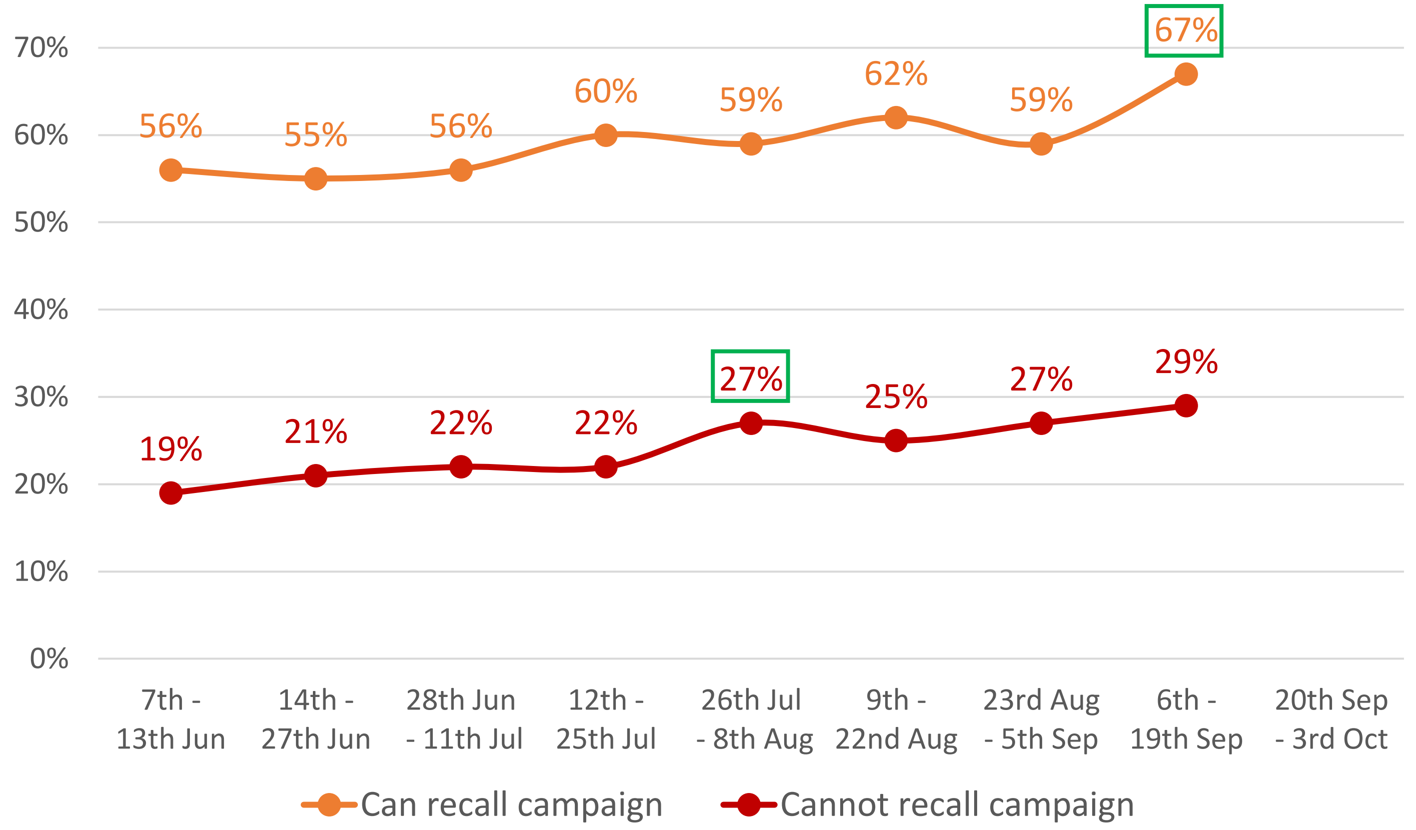
Whether they have visited London* since 10th May 2021

Data shown – Net of all types of trips



**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=171+ each fortnight) / All who cannot recall the campaign (n=822+ each fortnight).

Statistically significant increase since the previous fortnight.

Domestic visits

(excluding Londoners)

Amongst those who can recall the campaign, three-fifths have visited London since 10th May. This is a significant increase, and higher than any previous fortnight.

They continue to be **2.5 times more likely to have visited London than those who cannot recall the campaign.**

Amongst those who cannot recall the campaign, there has been a small increase, with one-quarter visiting London since the 10th May.

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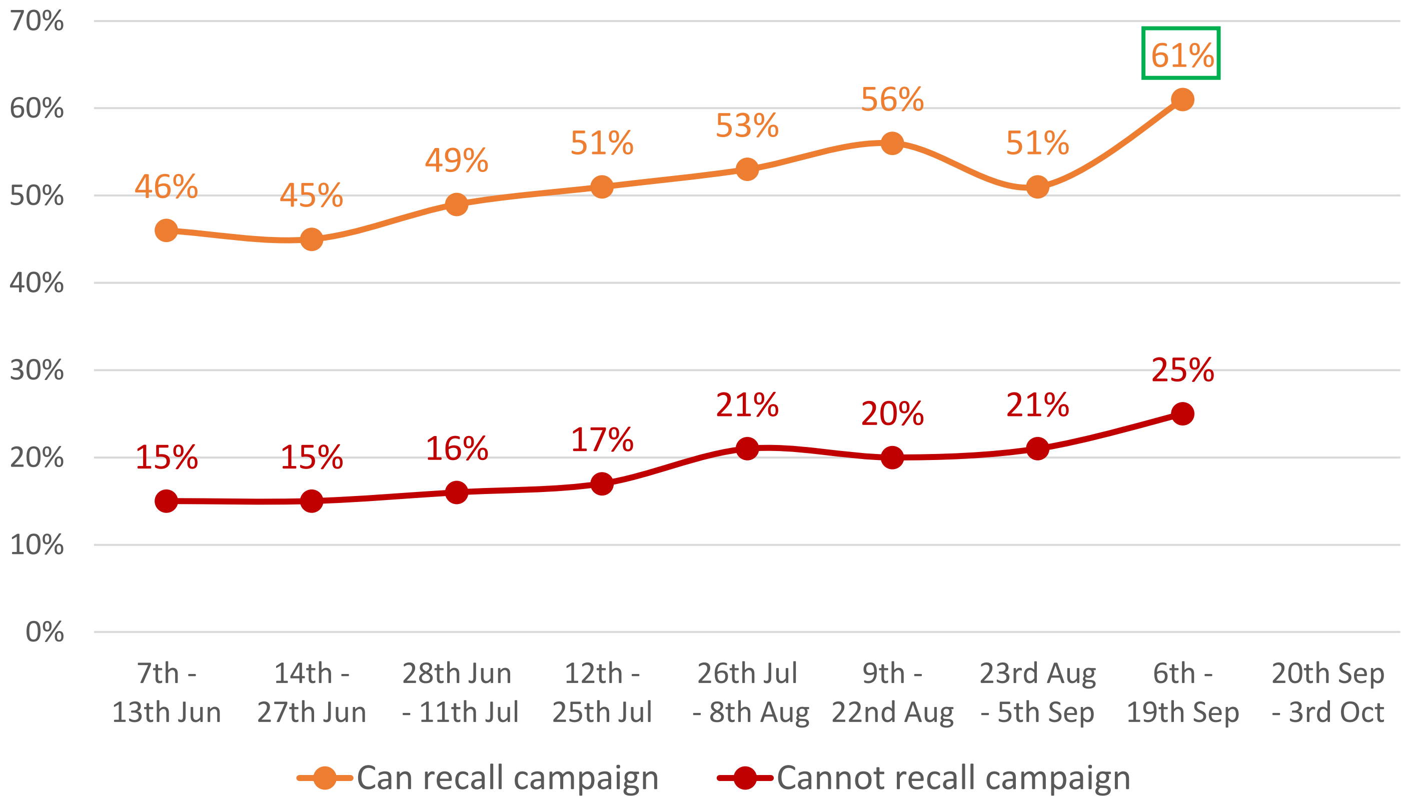
Whether they have visited London* since 10th May 2021 (All regions excl. London)

Data shown – Net of all types of trips



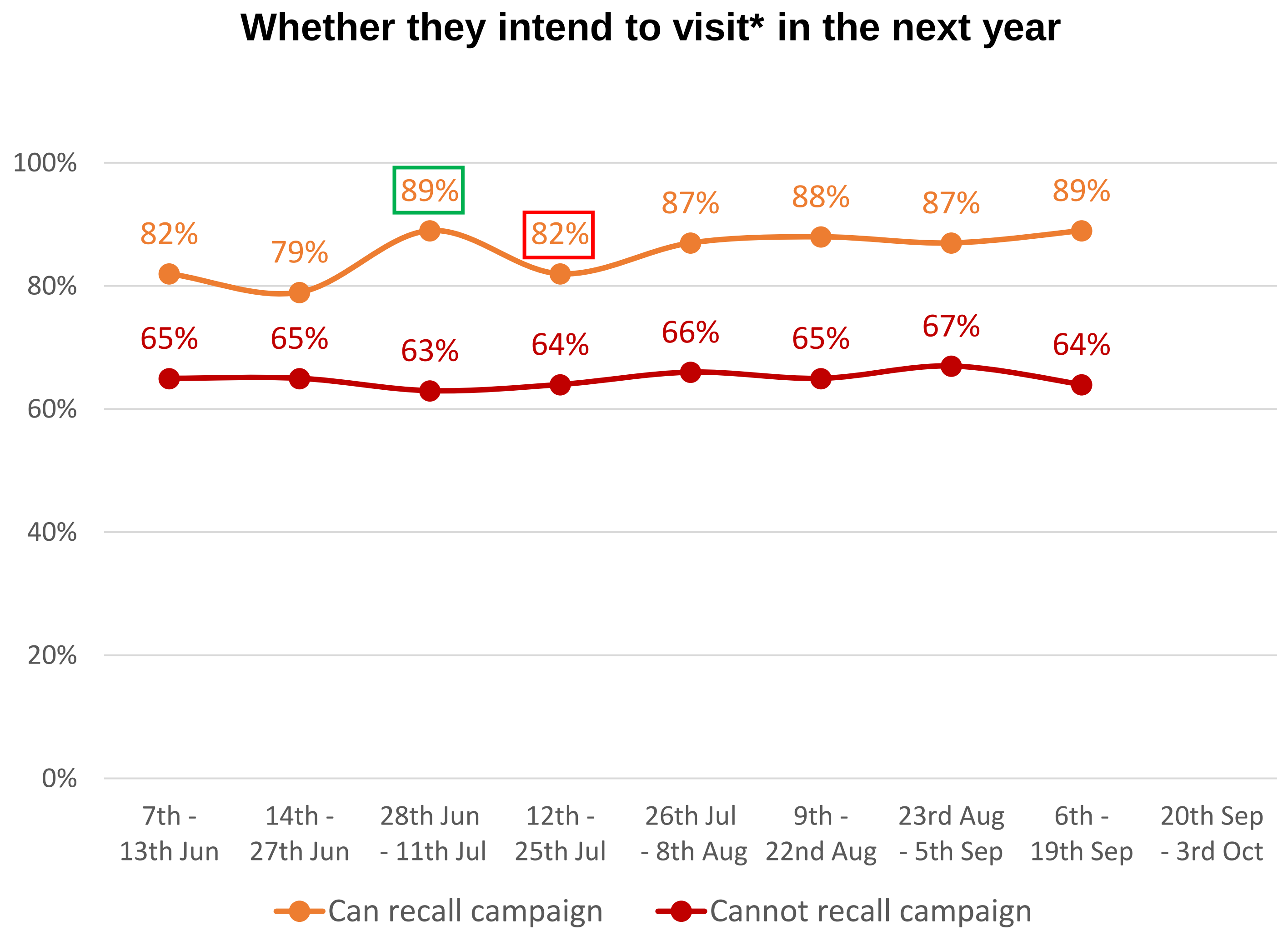
Q8. Since the 10th May 2021, how many (if any) of the following types of trips to London have you made? Data shown is net of day trip, short trip, mid-length trip or longer trip.
Base: All regions excl. London – those who can recall the campaign (n=119+ each fortnight) / those who cannot recall the campaign (n=669+ each fortnight).

Intentions to visit London

Intent to visit London in the next year remains stable.

9 in 10 of those who can recall the campaign intend to visit within the next year.

They are 25% points more likely to intend to visit London within the next year than those who cannot recall the campaign.



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.

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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=171+ each fortnight) / All who cannot recall the campaign (n=822+ each fortnight).
Statistically significant increase since the previous fortnight. Statistically significant decrease since the previous fortnight.

Domestic intent

(excluding Londoners)

When looking at those living outside of London only, it is a similar picture.

Intent remains stable, with **nearly 9 in 10 of those who can recall the campaign intending to visit in the next year.**

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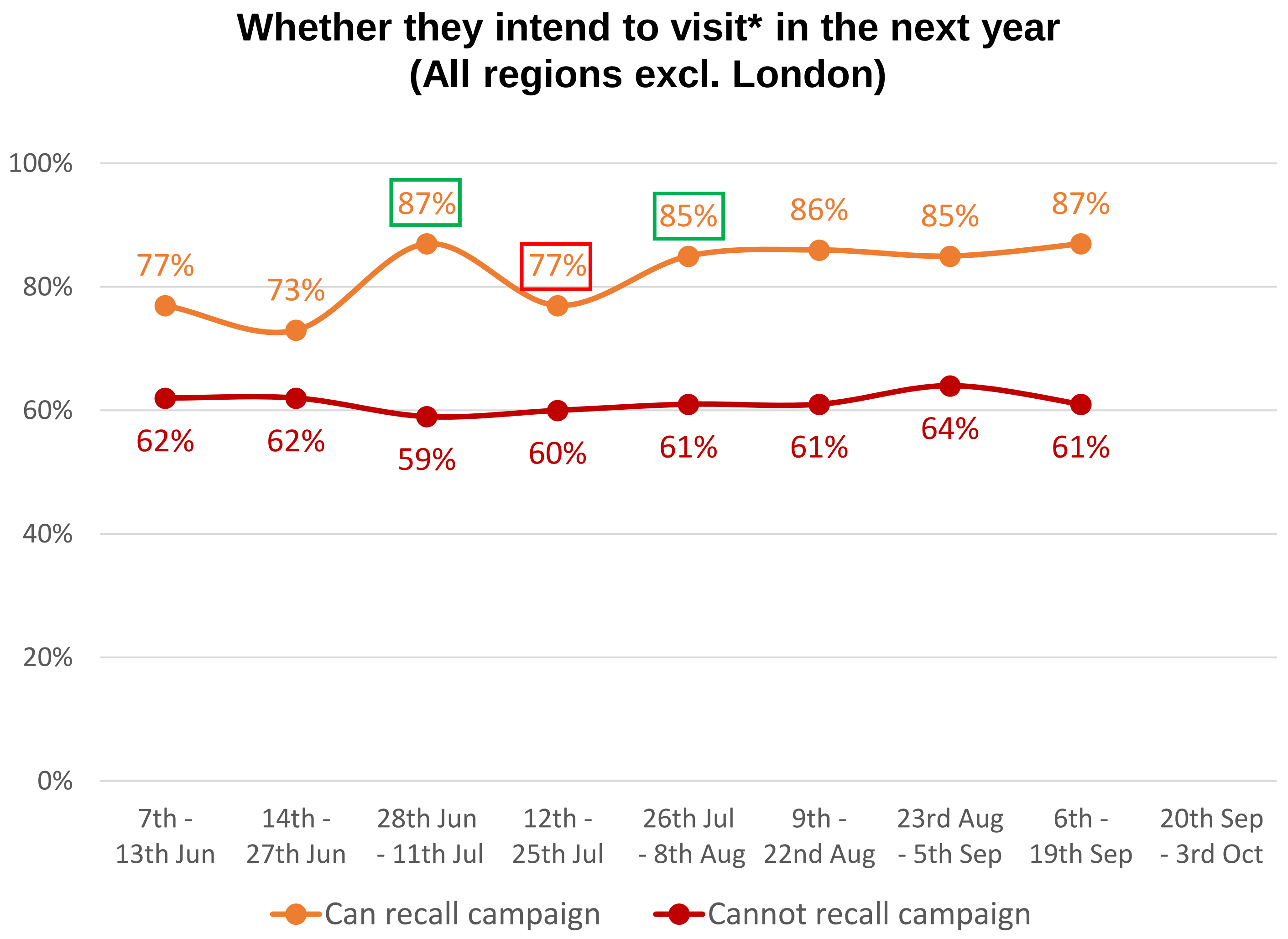

Q9. Within the next year, do you intend to take any of the following types of trips to London? Data shown is net of day trip, short trip, mid-length trip or longer trip.
Base: All regions excl. London – those who can recall the campaign (n=119+ each fortnight) / those who cannot recall the campaign (n=669+ each fortnight).
Statistically significant increase since the previous fortnight. Statistically significant decrease since the previous fortnight.

Intentions to visit London in the short-term

Intent to visit London in the next 3 months has seen a small increase amongst those who can recall the campaign.

Intention amongst those who can recall the campaign remains high at three-fifths intending to do so.

Amongst those who cannot recall the campaign, intent remains stable at a third.

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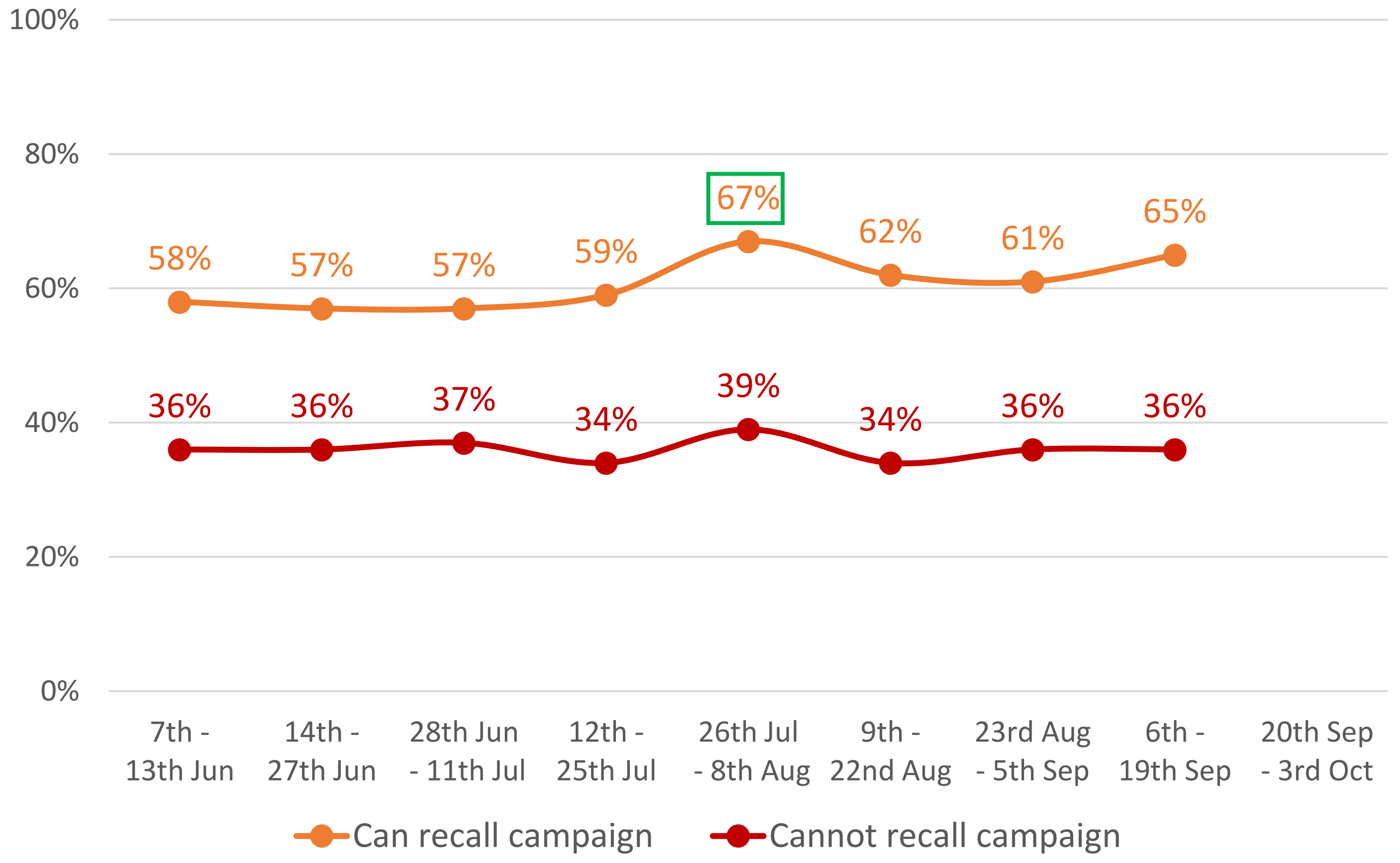
Whether they intend to visit* in the next 3 months



**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=171+ each fortnight) / All who cannot recall the campaign (n=822+ each fortnight).

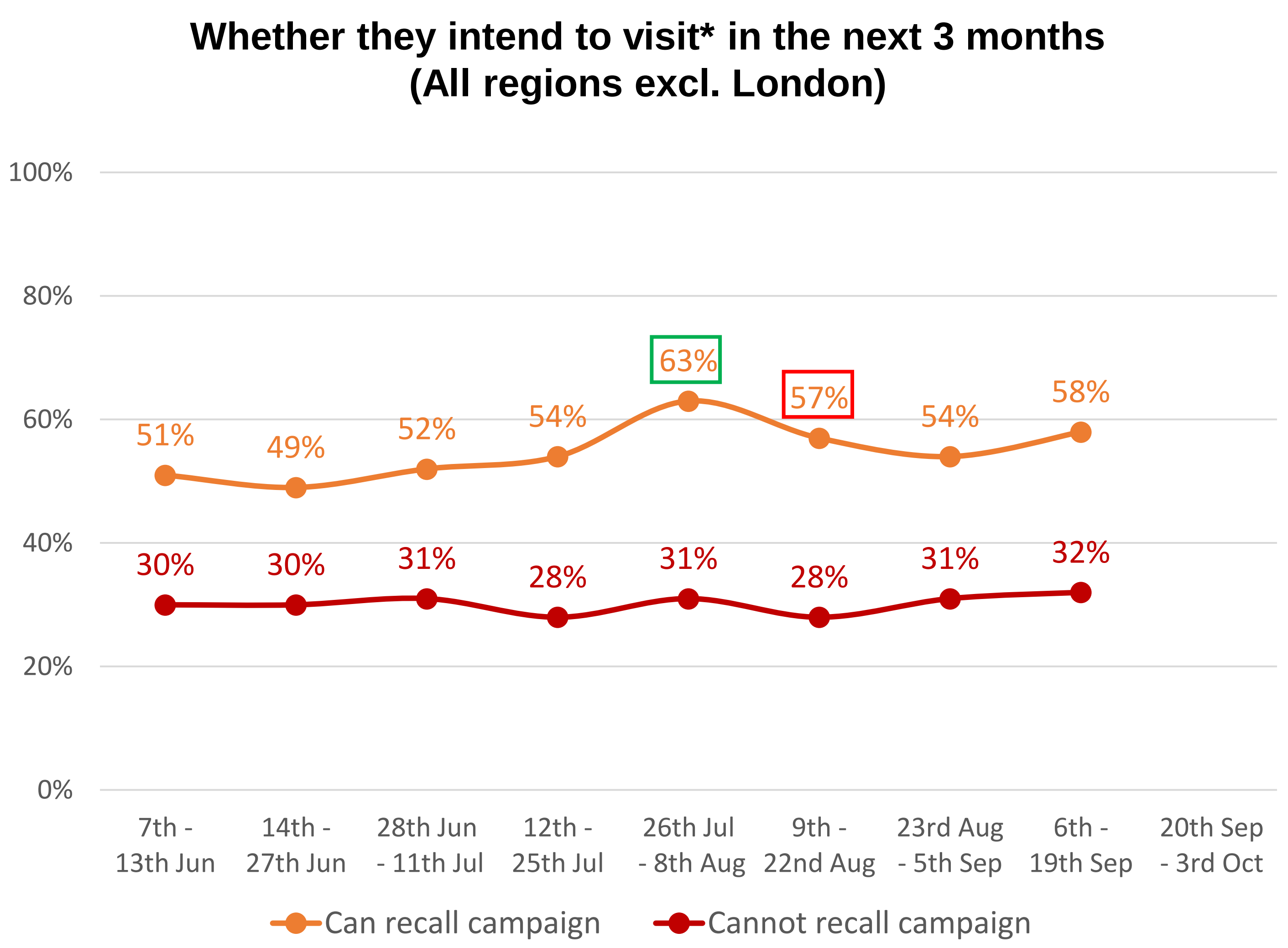
Statistically significant increase since the previous fortnight.

Intentions to visit London in the short-term
(excluding Londoners)

Intent to visit London in the short-term has increased again following a dip in the last fortnight.

Almost three-fifths of those who can recall the campaign intend to visit London in the next three months.

Intent amongst those who cannot recall the campaign has remained consistent since the start of the campaign, at a third.



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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+ each fortnight) / those who cannot recall the campaign (n=669+ each fortnight).

Statistically significant increase since the previous fortnight.
Statistically significant decrease since the previous fortnight

Confidence to visit London

Amongst those who can recall the campaign, confidence in visiting London has increased, to the highest level since reporting began, following a dip on 23rd August.

Amongst those who cannot recall the campaign, confidence remains stable, with almost one-third feeling comfortable to visit London.

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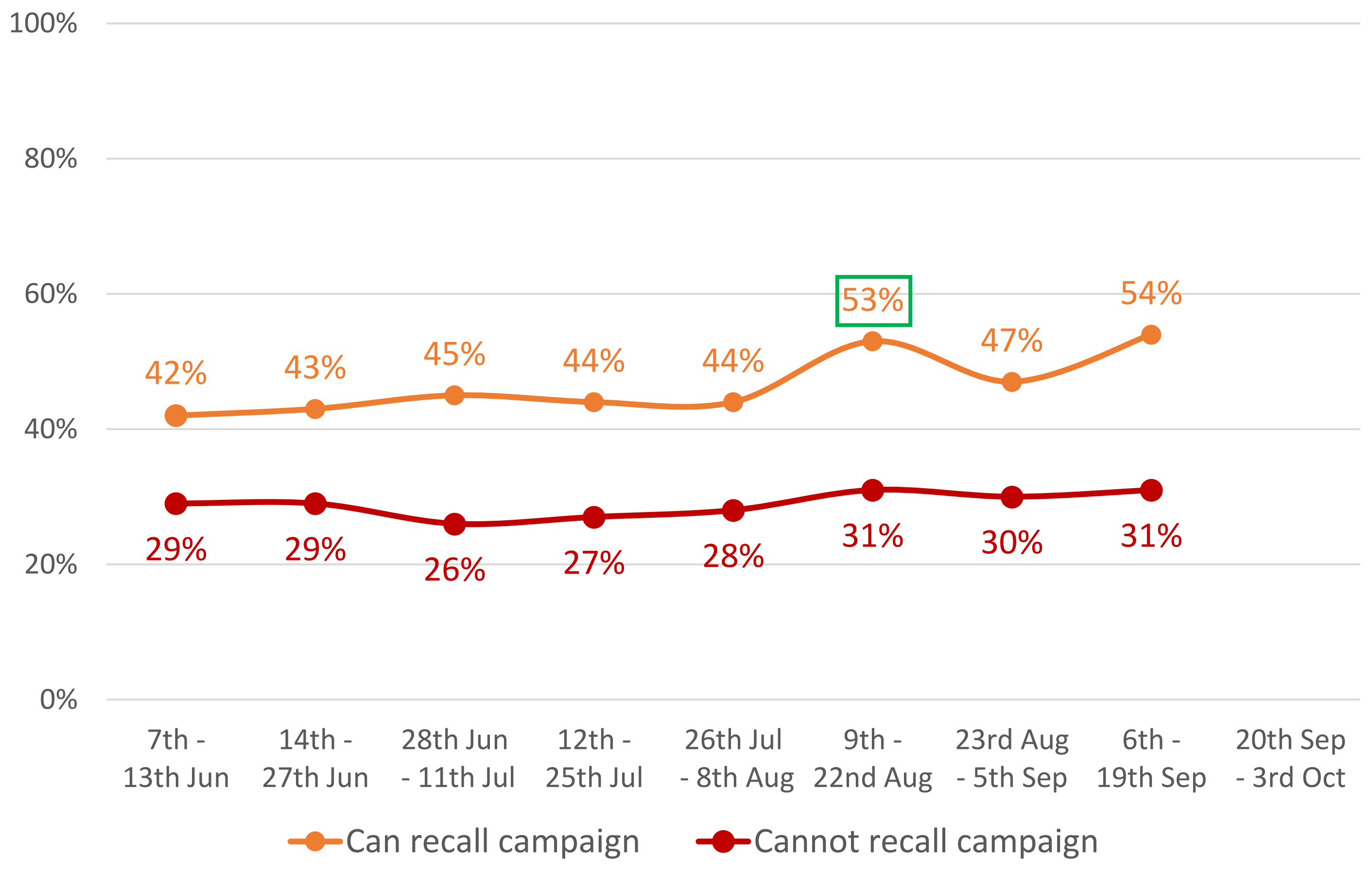
Whether they feel comfortable to take a trip* to London

(NET: Scores 8-10)



**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=171+ each fortnight) / All who cannot recall the campaign (n=822+ each fortnight). Statistically significant increase since the previous fortnight.

Domestic travel confidence
(excluding Londoners)

Amongst those living outside of London, there has been no change in levels of confidence in visiting London – it remains at one-third. London remains the destination that people feel least comfortable visiting.

Confidence in visiting most other destinations has fallen.

People have less confidence in visiting cities and towns compared to visiting the seaside and rural locations.

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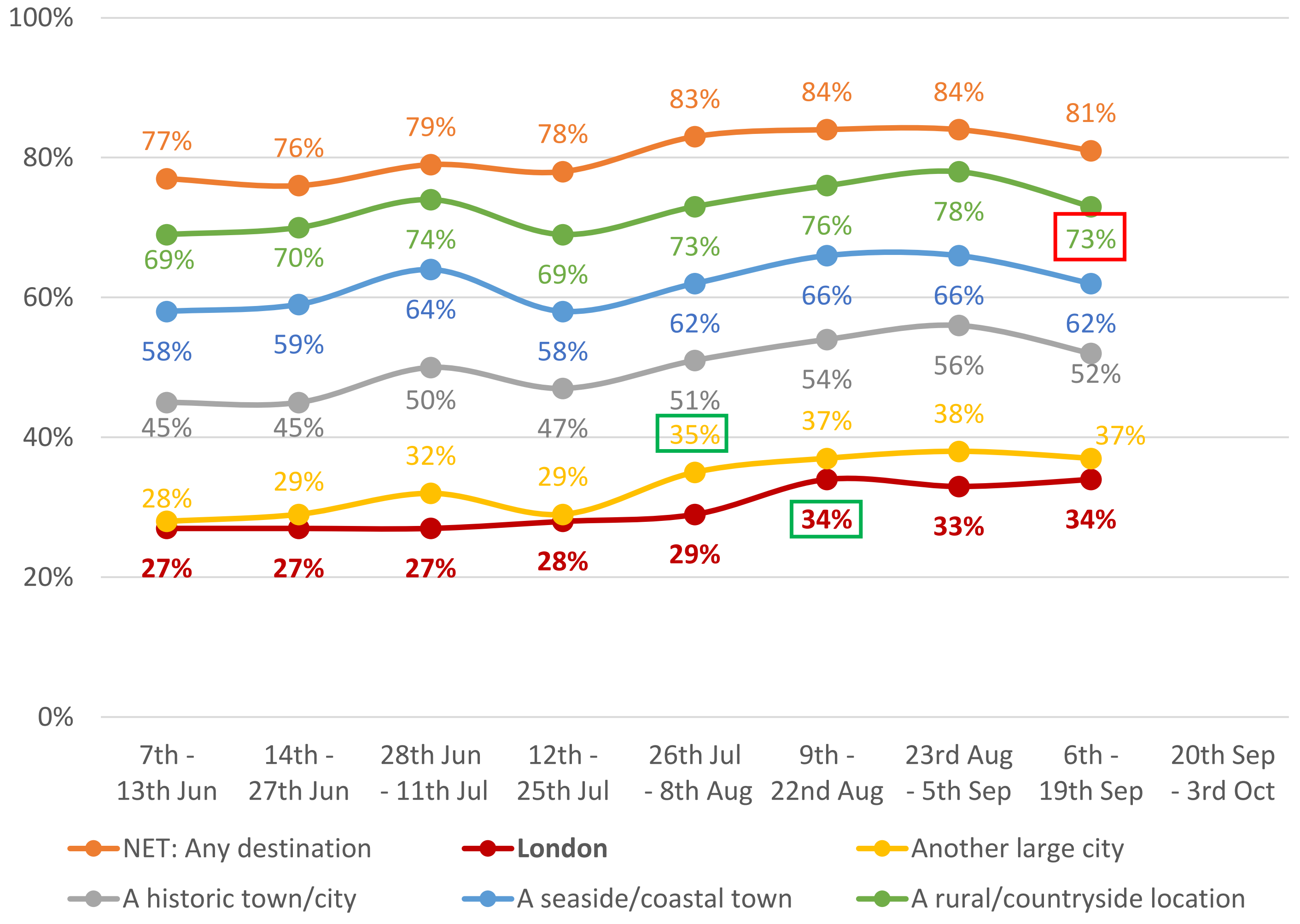
Whether people feel comfortable to take a trip to each destination

All regions excl. London (NET: Scores 8-10)



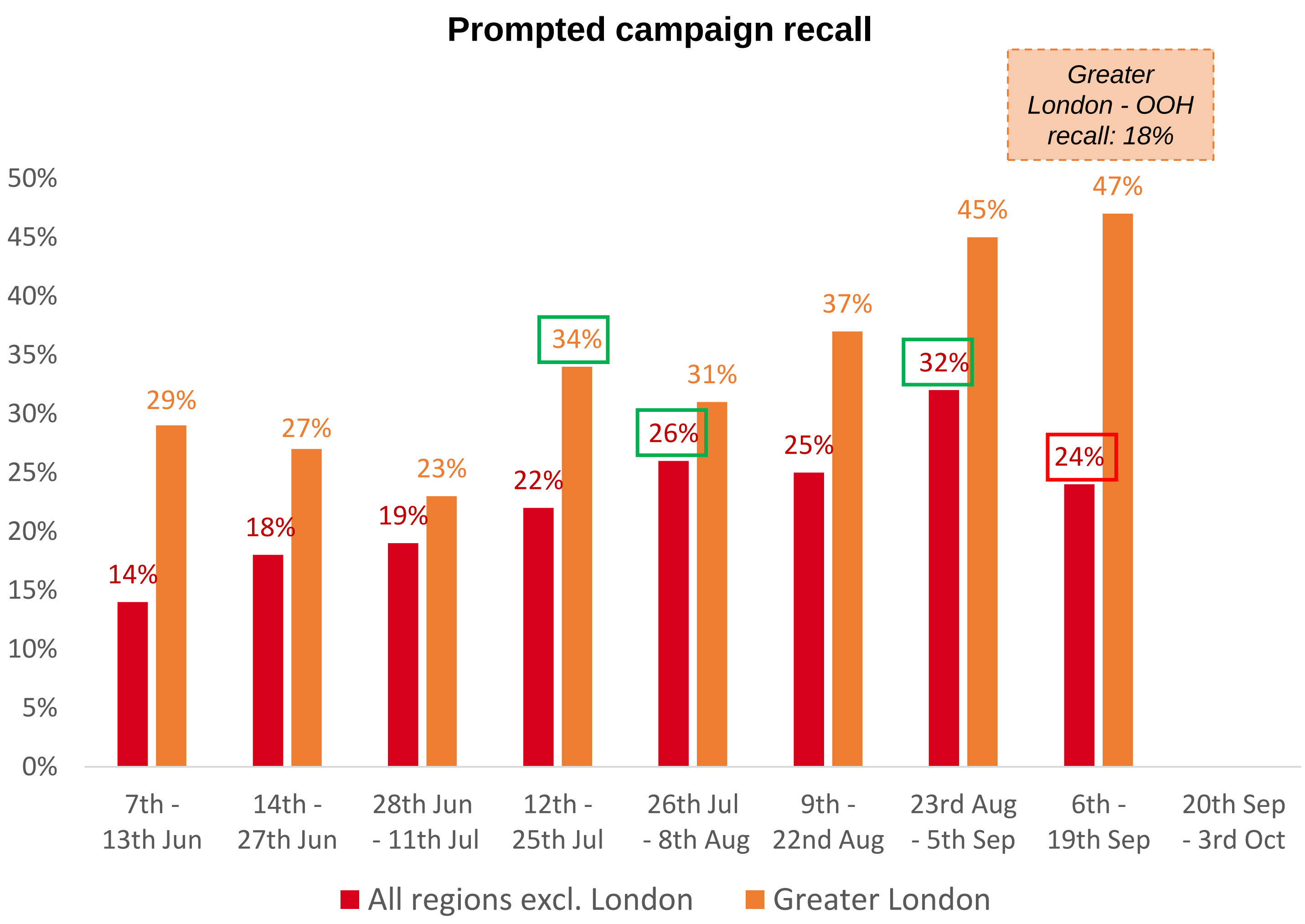
Q7. On a scale of 1 to 10, how comfortable do you feel about taking a trip or short break in the next 2 months to each of the following? Data shown = net of scores 8-10.
Base: All regions excl. Greater London (n=822+ each fortnight). Statistically significant increase since the previous fortnight.

Campaign recall

Recall continues to strengthen in Greater London, with almost half recalling the campaign.

The OOH campaign launched on 4th August continues to be driving this recall, with almost one-fifth seeing the campaign when out and about.

Amongst those living outside of London, recall returns to levels seen prior to last fortnight's peak following the end of the TV ad run.



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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+ each fortnight) / Greater London (n=203+ each fortnight).

Statistically significant increase since the previous fortnight.

Channel performance

PR
- Over 1,150 domestic articles

Radio
- 14.2m reach
- Second burst live

#LetsDoLondon hashtag
- 4.59 million engagements

Social Media (live)
- Strongest performance continues amongst 25-45s, an audience we are optimising.
- Adults continue to deliver strong volume, with similar engagement rates for both parents and adults.
- 6s format has strongest delivery performance.

Digital (live)
- Display partners continue to deliver strong viewability and out-perform industry benchmarks.
- Parents are continuing to drive a higher rate of engagement and views.
- Optimising video content in final weeks due to strong performance.
- YouTube - 30s video continues to drive the strongest view through rates however 6s delivers the greater volume.

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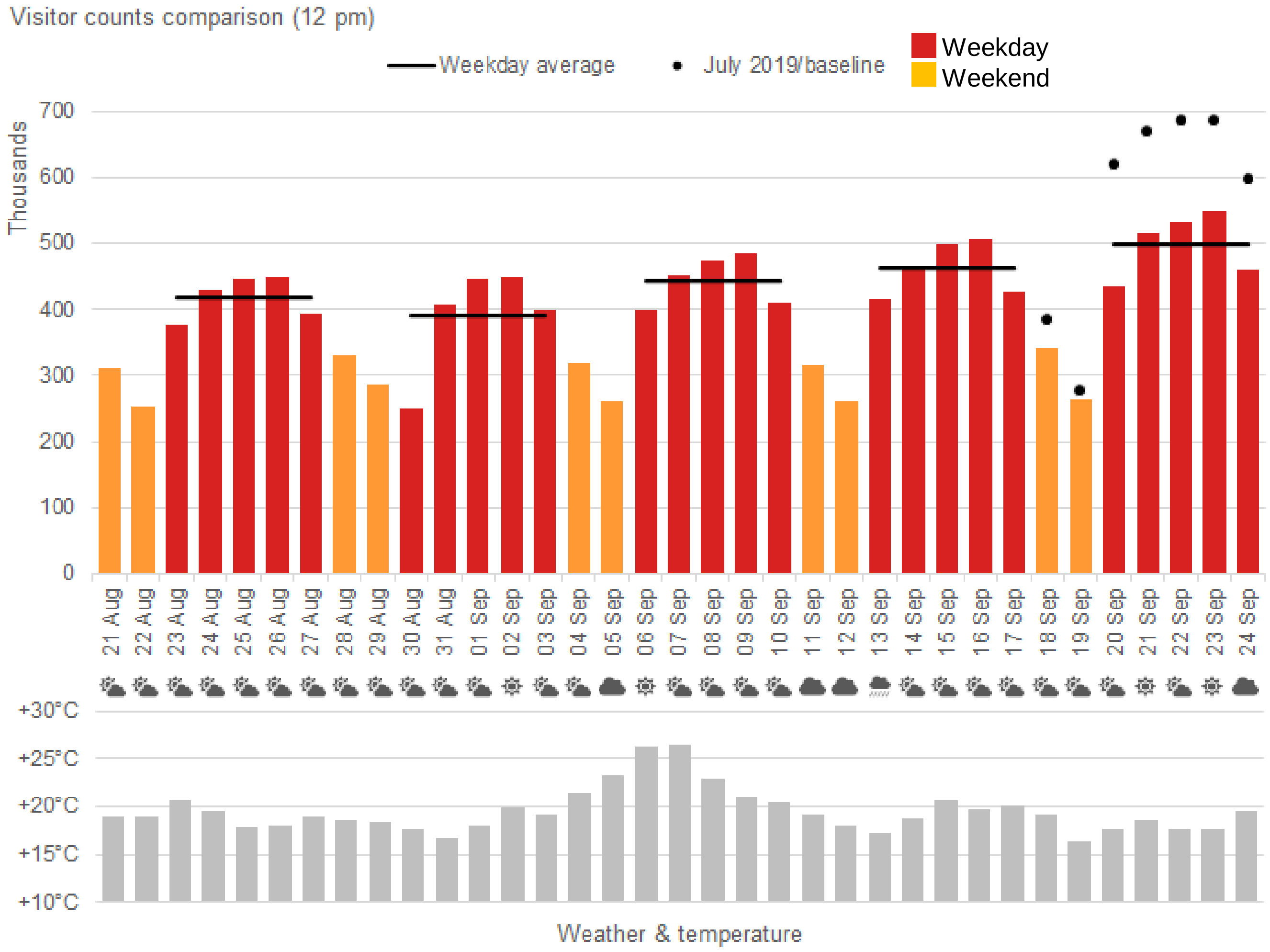
*Estimation based on activity delivered to date, tracking against planned R&F
** Engagements = estimated number of people who heard 100% of the ad

London recovery trends

Daytime visits

- Visitor numbers continue to climb, nearly cracking 500k on average during the week, or 75% of pre-pandemic levels
- Latest weekday visitor average number is 19% higher than w/c 23 Aug
- Weekend visitor numbers are also increasing, now at around 92% of pre-pandemic levels



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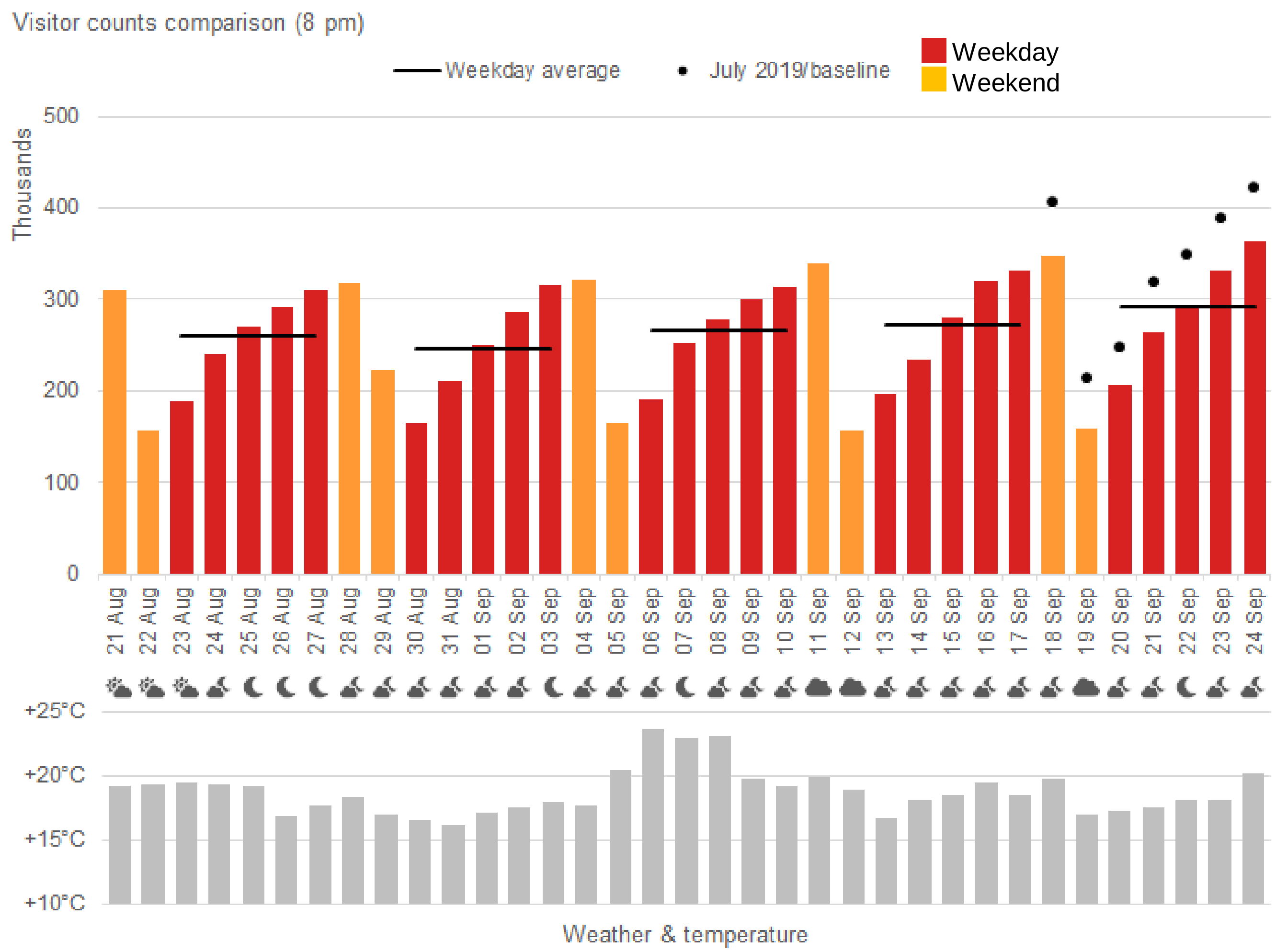
Anonymised and aggregated population movement data from O2 Motion. Data insights shared operate within strict privacy guidelines and never allow identification or mapping of individuals.
Data shown is based on O2 customers, expanded for UK residential population

Evening visits

- As with daytime visits, most recent week is busiest yet for evening visitors, now at around 83% of pre-pandemic levels throughout the week
- Evening footfall has now more than doubled since early May (111% increase)
- Evening visits grow from Monday through to Saturday

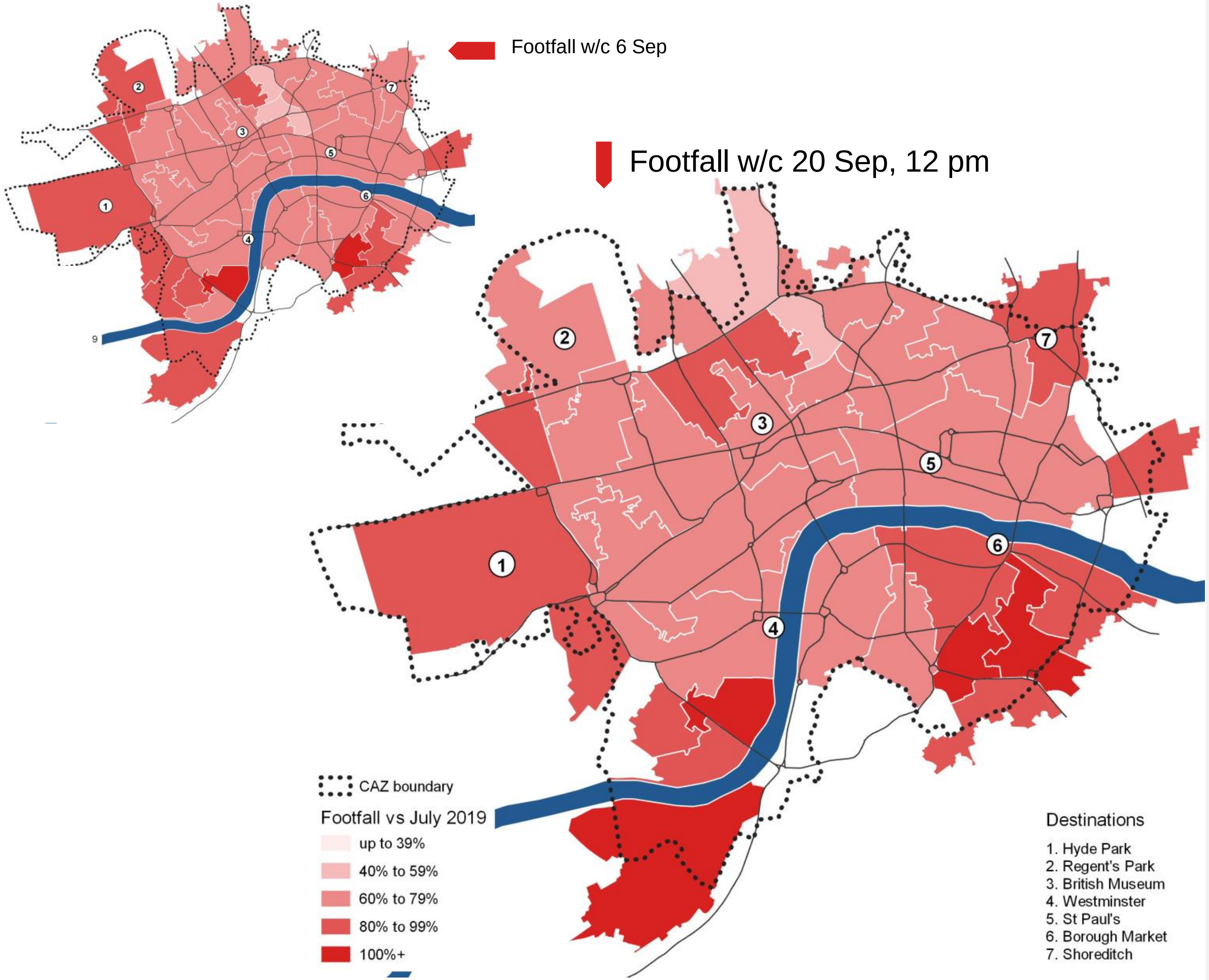


LET'S LONDON

Anonymised and aggregated population movement data from O2 Motion. Data insights shared operate within strict privacy guidelines and never allow identification or mapping of individuals.
Data shown is based on O2 customers, expanded for UK residential population

Daytime visits

- East-central London visitor footfall caught up to west-central in the last report and appears to have maintained those levels in recent weeks
- The area around Kings Cross/St Pancras has the weakest recovery, possibly due to lack of international passengers



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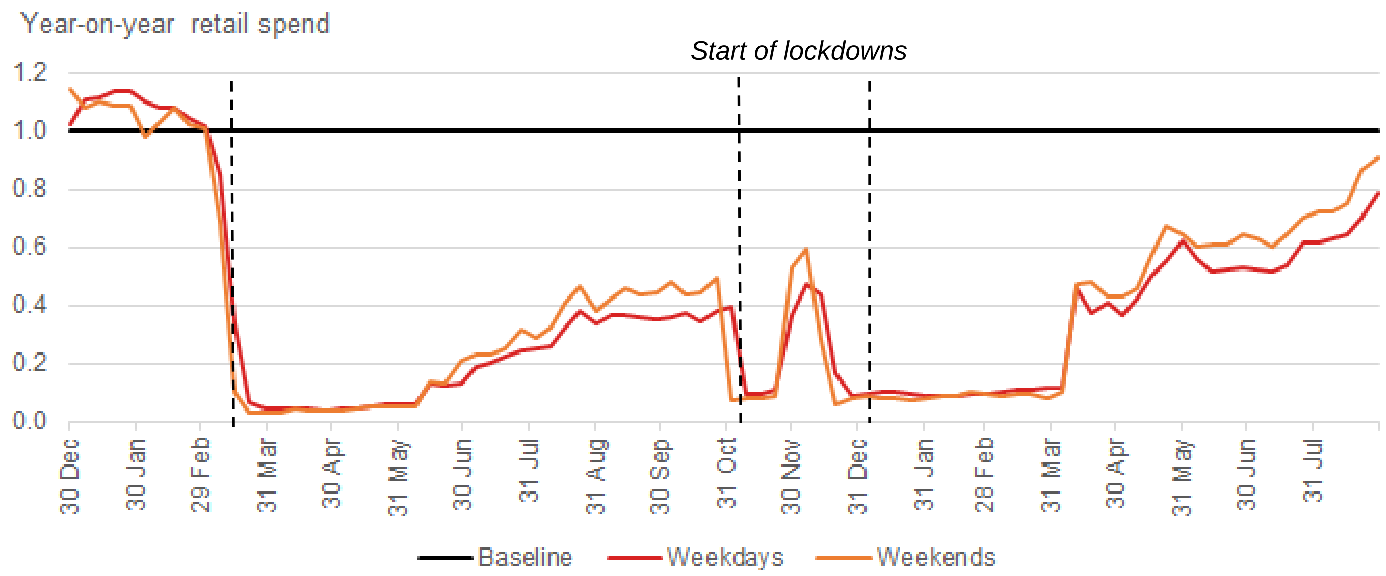
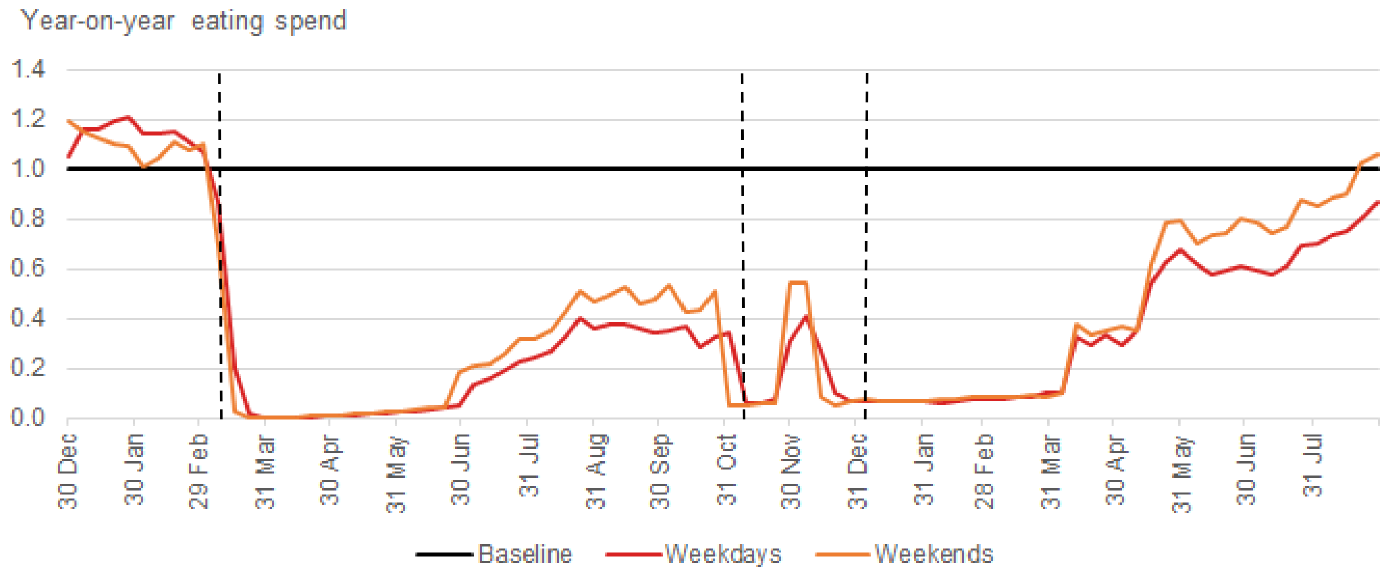
Visitors w/c 12 July vs July 2019. Anonymised and aggregated population movement data from O2 Motion. Data insights shared operate within strict privacy guidelines and never allow identification or mapping of individuals. Data shown is based on O2 customers, expanded for UK residential population

Spending

- **Spend in central London is at 80% or higher** compared to 2019, led by weekend eating
- Spending appears to have climbed steadily throughout school holidays across both categories and weekdays/ weekends





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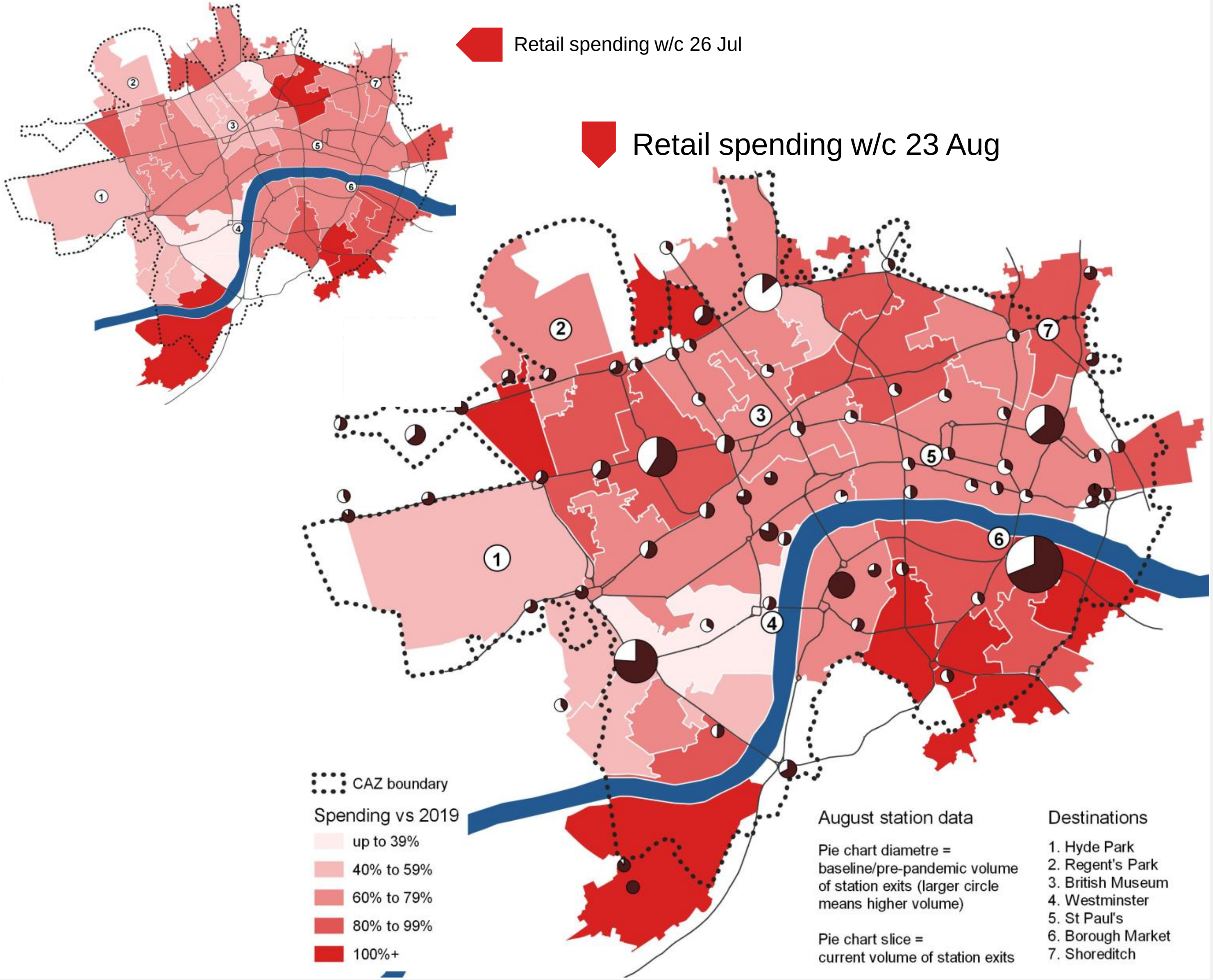
Anonymised and Aggregated data from Mastercard. Data captures card spend in 'bricks and mortar' establishments, rather than online.

Spending

- Spending appears to be increasing throughout the CAZ, with growing residential areas having the highest spend compared to 2019
- The area between Westminster and Victoria has had the lowest recovery (around 36% of usual spending), similar to previous months



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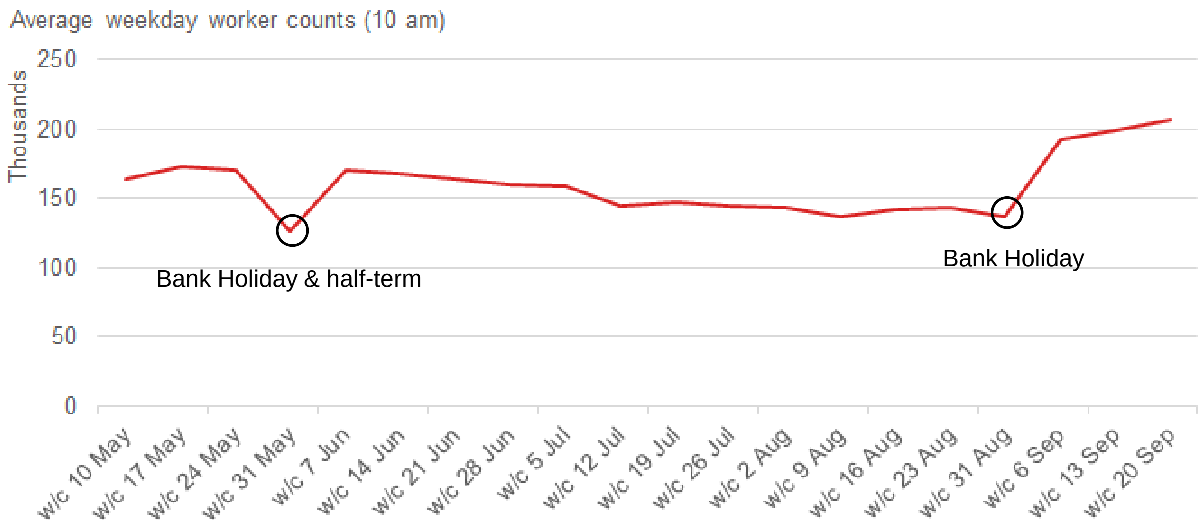
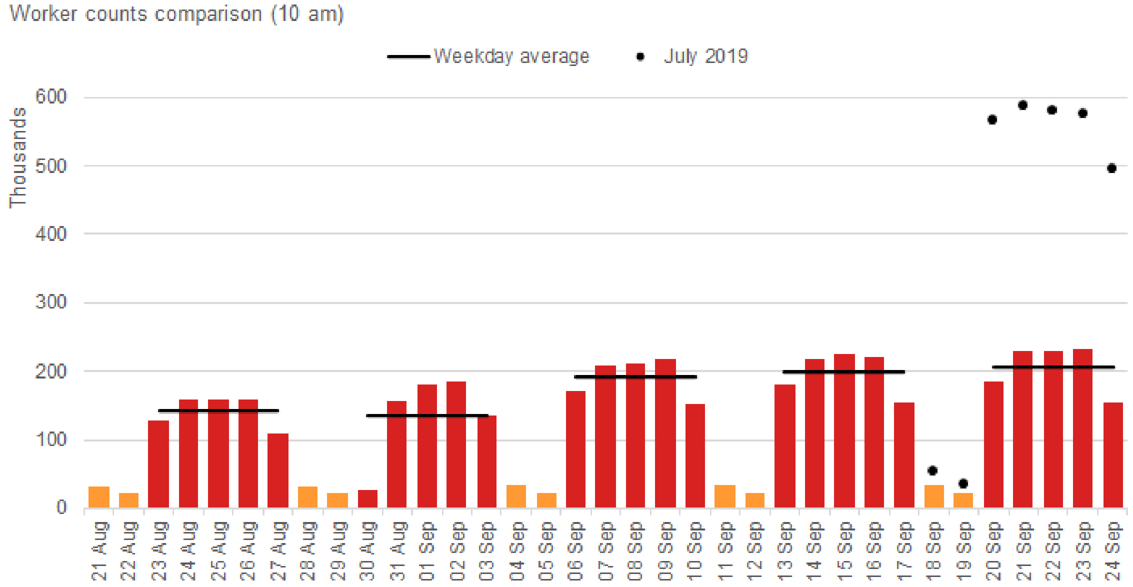
Anonymised and Aggregated data from Mastercard. Data captures card spend in 'bricks and mortar' establishments, rather than online.

Daytime workers

- **Weekday worker** numbers continue to climb, breaking 200k for the first time; now at around 37% of pre-pandemic levels
- Weekday worker numbers are 30k-45k lower on Mondays and Fridays
- **Weekend worker** numbers in recent weeks have been around 65% of usual, similar to figures in previous months





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Anonymised and aggregated population movement data from O2 Motion. Data insights shared operate within strict privacy guidelines and never allow identification or mapping of individuals.
Data shown is based on O2 customers, expanded for UK residential population.

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

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Appendix: methodology & data sources

Campaign evaluation data

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

Tube demand data

- TfL network demand dashboard

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 population movement data from O2 Motion. Data insights shared operate within strict privacy guidelines and never allow identification or mapping of individuals.

Mastercard Retail Index

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

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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

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LET'S DO LONDON

Campaign performance to date
20.10.22

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UK domestic campaign

For Internal Use Only – Not For Distribution

Levels of campaign recall
(Aggregated data)

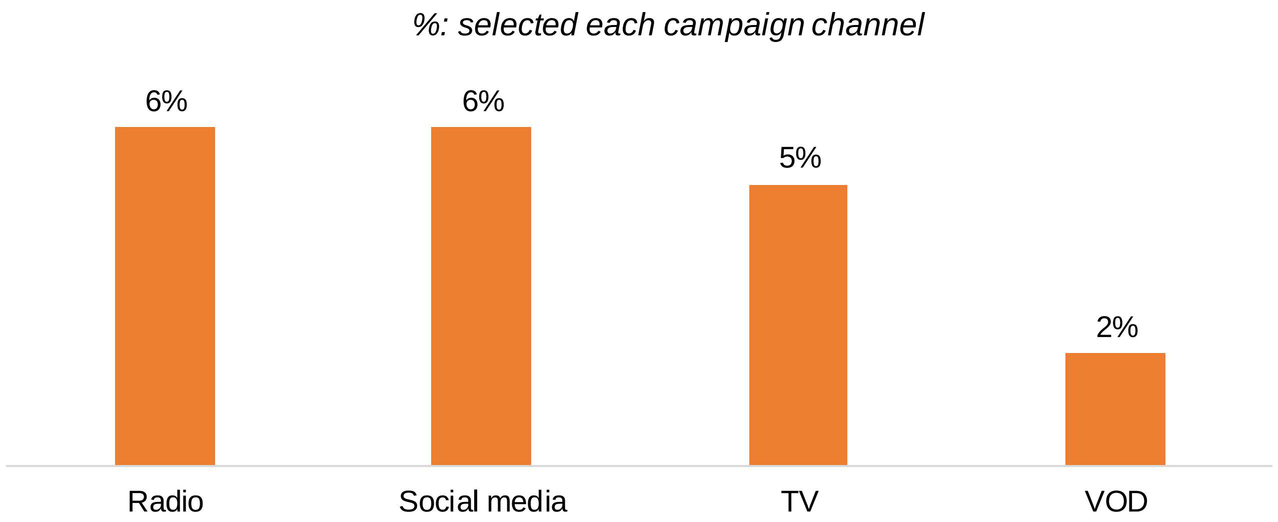
- On average across the two waves, **a fifth** could recall the campaign (across any channel).
- **Recall was primarily being driven by radio and social media**, with a similar proportion recalling seeing or hearing the campaign on these channels.

Whether they could recall seeing or hearing the campaign since 4th July*

Data shown: Wave 1: % selected any channel
Data shown: Wave 2 and 3: % selected 'Yes'

19%

could recall seeing the campaign (across any channel)



Wave 1: Where, if anywhere, do you remember seeing or hearing this advertising for this campaign since the 4th July 2022? Wave 2: Have you seen or heard this advertising or this campaign since the 4th July 2022? Where, if anywhere, do you remember seeing or hearing this since the 4th July 2022?

Base: All respondents (n=2585).

Intent to visit London in the next 12 months
(Aggregated data)

- On average across the two waves, **two-thirds** intend to take a trip to London within the next year.
- **Intent was higher amongst those who could recall the campaign** than those who could not. Three-quarters of those who could recall were intending to do so, compared to two-thirds of those who could not.

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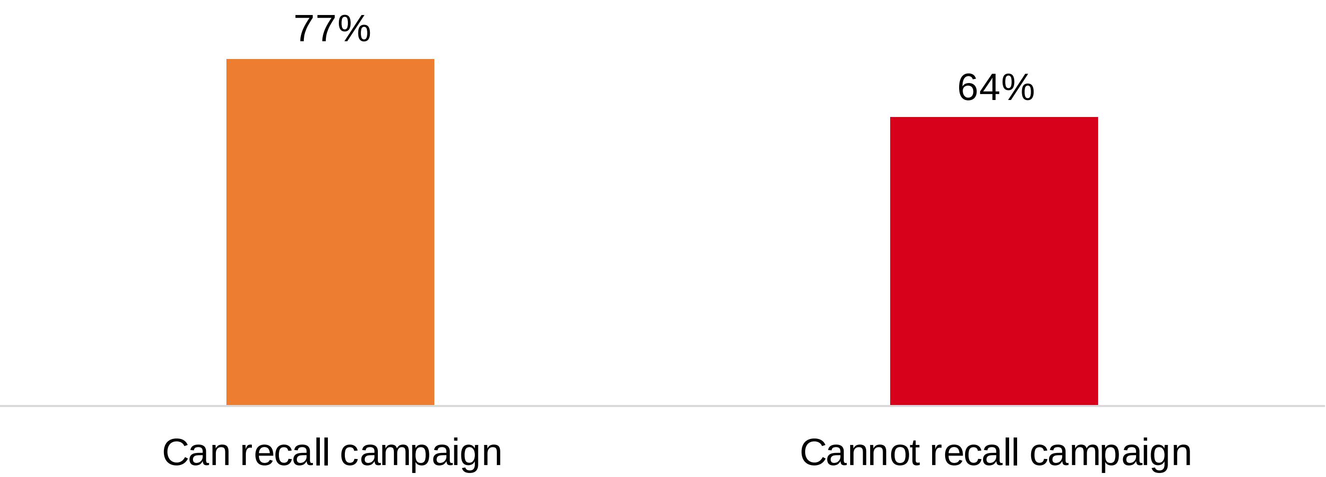
Whether they intend to take a trip to London in the next year
Data shown - % Yes

66%
intend to take a trip to London in the next year



Q. Within the next 12 months, do you intend to take a trip to London?
Base: All respondents (n=2585) – those who could recall the campaign (n=474) / those who could not recall the campaign (n=2111).

Intent to visit London in the next 3 months
(Aggregated data)

- **A third intend to take a trip to London in the next three months.**
- Intent in the short-term is 13% pts. higher amongst those who can recall the campaign than those who cannot.

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Whether they intend to take a trip to London in the 3 months

Data shown - % selected 'Within the next month' or 'Within the next 2-3 months'.

32%

intend to take a trip to London in the 3 months

Q. You said you intend to visit London in the next 12 months. When do you intend to visit London for your next trip in the next 12 months? Rebased to all respondents.
Base: All respondents (n=2585) – those who could recall the campaign (n=474) / those who could not recall the campaign (n=2111).

Campaign impact on intended visits

- Amongst those who could recall the campaign and plan to visit London in the next year, **11% agreed that the campaign had influenced them to plan their trip.** This is consistent with the first wave.
- A fifth said that they were already planning to book a trip, but that it influenced them to extend their stay – down slightly compared to the first wave.

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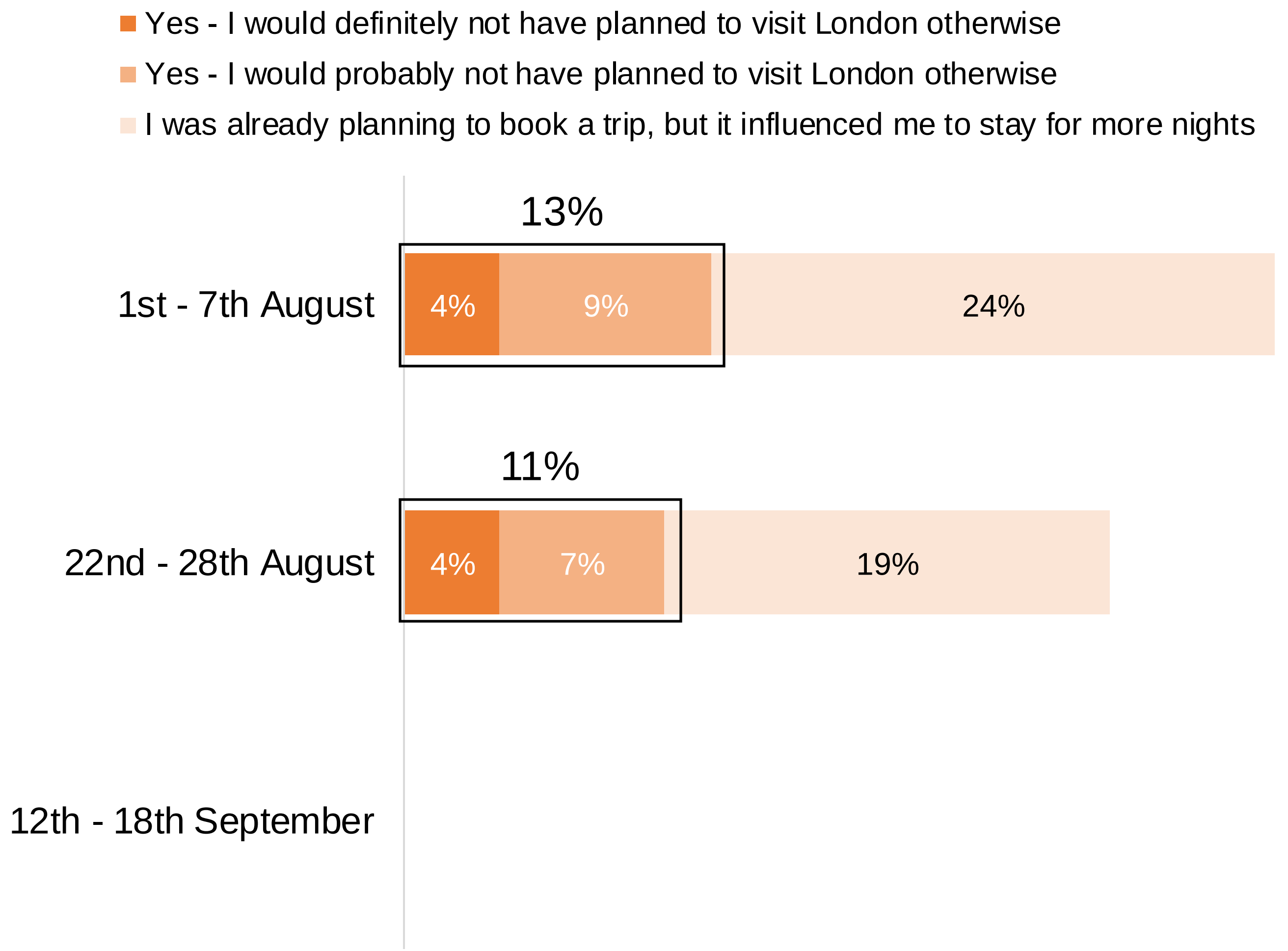
Whether the campaign had influenced their plan to visit London

Amongst those who could recall the campaign and intend to take a trip in the next 12 months



Q. You said that you had seen the advertising before today. You also told us that you plan to visit London in the next 12 months. Has this campaign influenced your plans to visit London?
Base: Those who said they intend to visit London in the next 12 months and could recall the campaign (1st – 7th Aug 2022: n=199; 22nd-28th August: n=155).

Campaign Metrics

UK domestic total
Reach: 38.2m
Frequency: 16.1

% of target audience that have visited London
29%

Date: 21 October 2022

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International campaign

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Levels of campaign recall
(Aggregated data)

- Campaign recall across all markets is strong, particularly in the USA and France.
- Recall is double that of the domestic 2021 campaign, demonstrating the impact of the bold creative.

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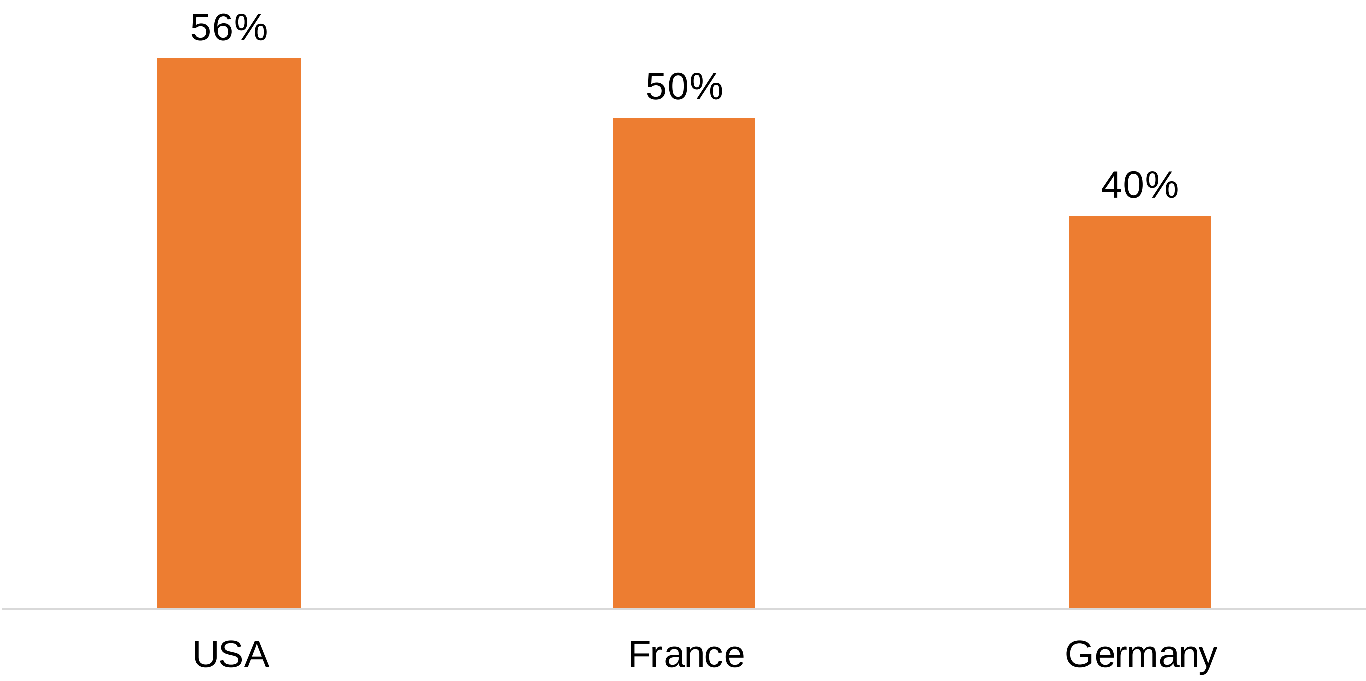
Where (if at all) have you seen or heard any of these adverts, or anything related to this 'Let's Do London' campaign?

Data shown – % selected any channel



Q. Where, if anywhere, do you remember seeing this advertising or this campaign before today?
USA base: 25-55 year olds who travelled to Europe at least once a year pre-Covid pandemic (n=2019).
France base: 18-45 year olds who travelled to other countries in Europe at least once a year pre-Covid pandemic (n=1547).
Germany base: 18-45 year olds who travelled to other countries in Europe at least once a year pre-Covid pandemic (n=1551).

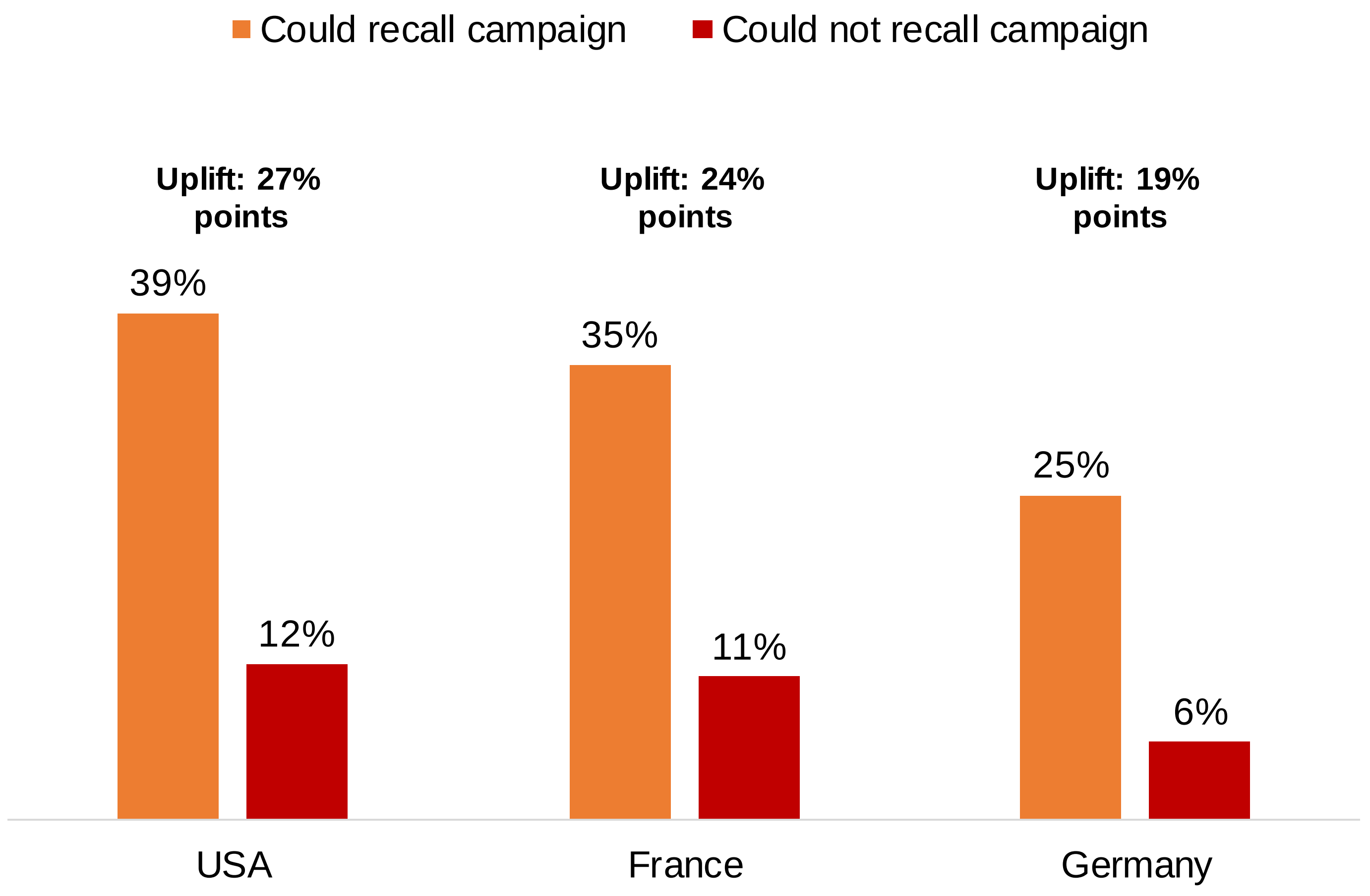
Recent visits to London

(Aggregated data)

- Impact is particularly strong in the USA and France. In both markets, those who could recall the campaign are around three times more likely to have visited.

Whether they have taken a trip to London since the 9th May 2022

Data shown – Net Yes: 'Yes, I took my first trip ever to London' or 'Yes, and I have also visited London before'



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Q. Have you taken a trip to London, England since 9th May 2022?

USA base: 25-55 year olds who travelled to Europe at least once a year pre-Covid pandemic (n=2019) – those who could recall the campaign (n=1122) / those who could not recall the campaign (n=897).
France base: 18-45 year olds who travelled to other countries in Europe at least once a year pre-Covid pandemic (n=1547) – those who could recall the campaign (n=769) / those who could not recall the campaign (n=778).
Germany base: 18-45 year olds who travelled to other countries in Europe at least once a year pre-Covid pandemic (n=1551) – those who could recall the campaign (n=611) / those who could not recall the campaign (n=940).

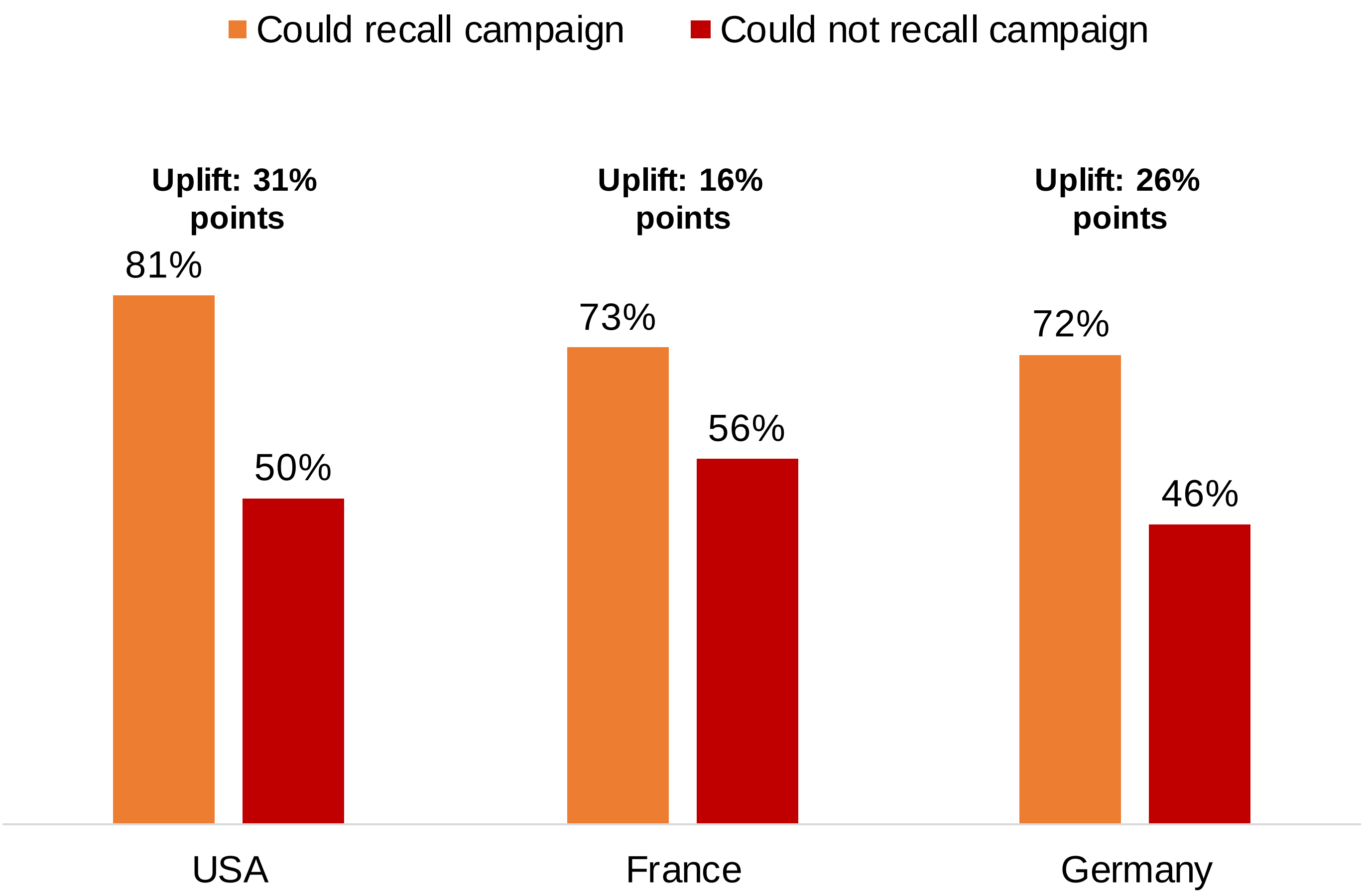
Intent to visit London in the next 12 months

(Aggregated data)

- Impact of the campaign on future intent to visit London is also strong – particularly in the USA.

Whether they intend to take a trip to London in the next year

Data shown - % Yes



LET'S LONDON

Q. Within the next 12 months, do you intend to take a trip to London, England?

USA base: 25-55 year olds who travelled to Europe at least once a year pre-Covid pandemic (n=2019) – those who could recall the campaign (n=1122) / those who could not recall the campaign (n=897).
France base: 18-45 year olds who travelled to other countries in Europe at least once a year pre-Covid pandemic (n=1547) – those who could recall the campaign (n=769) / those who could not recall the campaign (n=778).
Germany base: 18-45 year olds who travelled to other countries in Europe at least once a year pre-Covid pandemic (n=1551) – those who could recall the campaign (n=611) / those who could not recall the campaign (n=940).

All markets

Campaign impact on intended visits

- The impact of the campaign on intent to visit London is further demonstrated by large proportions of those who could recall the campaign saying that it influenced their plans to visit.

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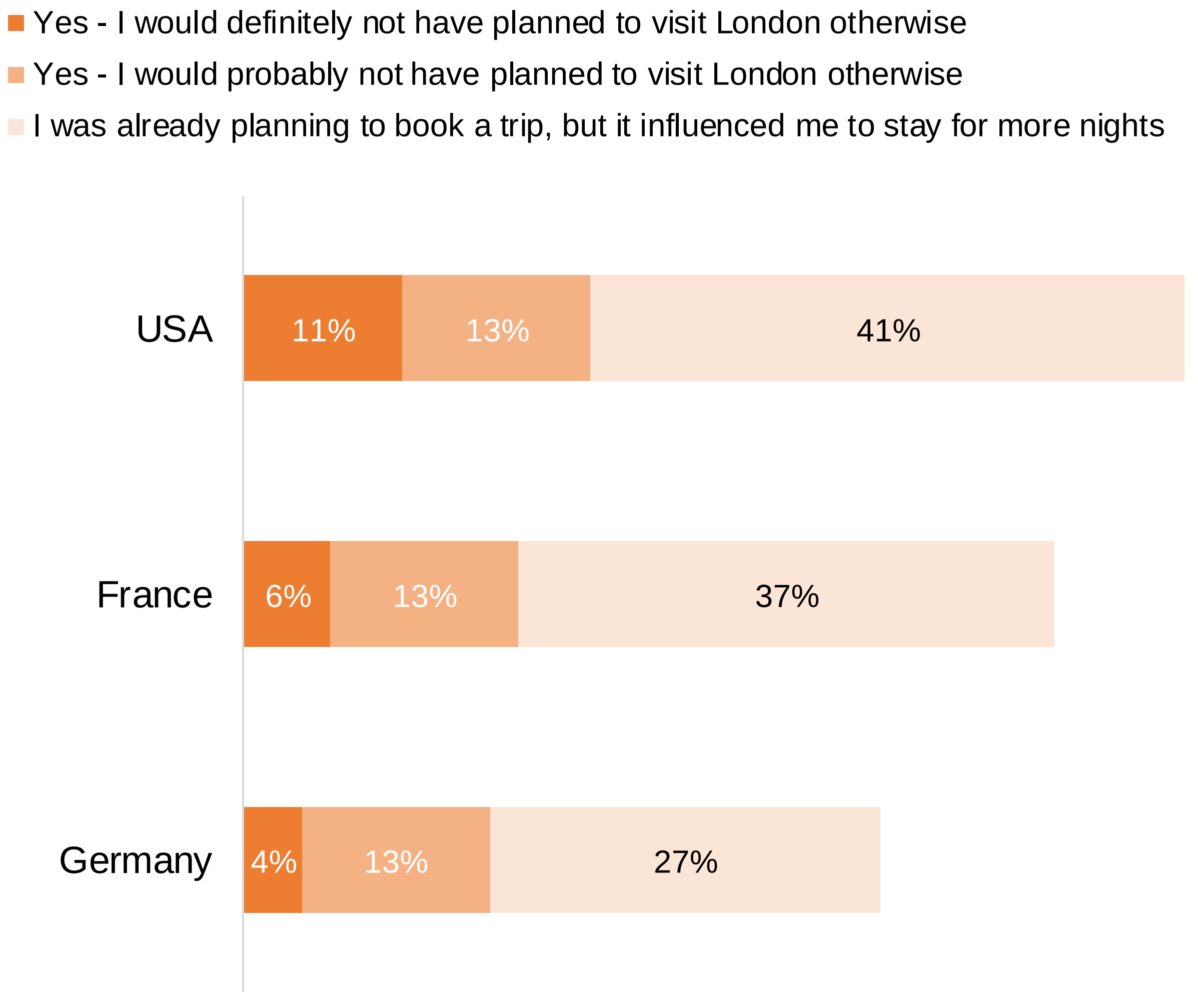
Whether the campaign had influenced their plan to visit London

Amongst those who could recall the campaign and intend to take a trip in the next 12 months



Q. You said that you had seen the advertising before today. You also told us that you plan to visit London in the next 12 months. Has this campaign influenced your plans to visit London?

USA base: 25-55 year olds who travelled to Europe at least once a year pre-Covid pandemic, who said they intend to take a trip to London in the next year, and could recall the campaign (n=906).

France base: 18-45 year olds who travelled to other countries in Europe at least once a year pre-Covid pandemic, who said they intend to take a trip to London in the next year, and could recall the campaign (n=565).

German base: 18-45 year olds who travelled to other countries in Europe at least once a year pre-Covid pandemic, who said they intend to take a trip to London in the next year, and could recall the campaign (n=213).

Campaign Metrics

International total
Reach: 168.1m
Frequency: 3.41

USA
Reach: 97.1m
Frequency: 3.1

France
Reach: 42.7m
Frequency: 4.13

Germany
Reach: 28.2m
Frequency: 3.33

% of target audience that have visited London

USA	France	Germany
17%	19%	11%

Date: 20 October 2022 (excludes D/OOH as based on impressions only)

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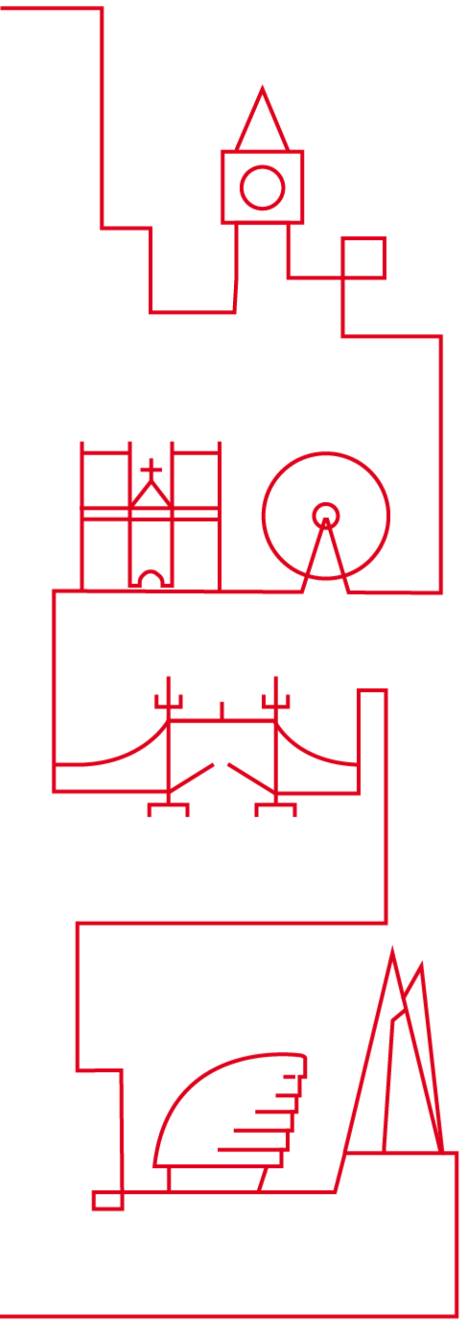
LET'S DO LONDON 2023

France & Germany Campaign Report



Let’s Do London 2023 Grant claim

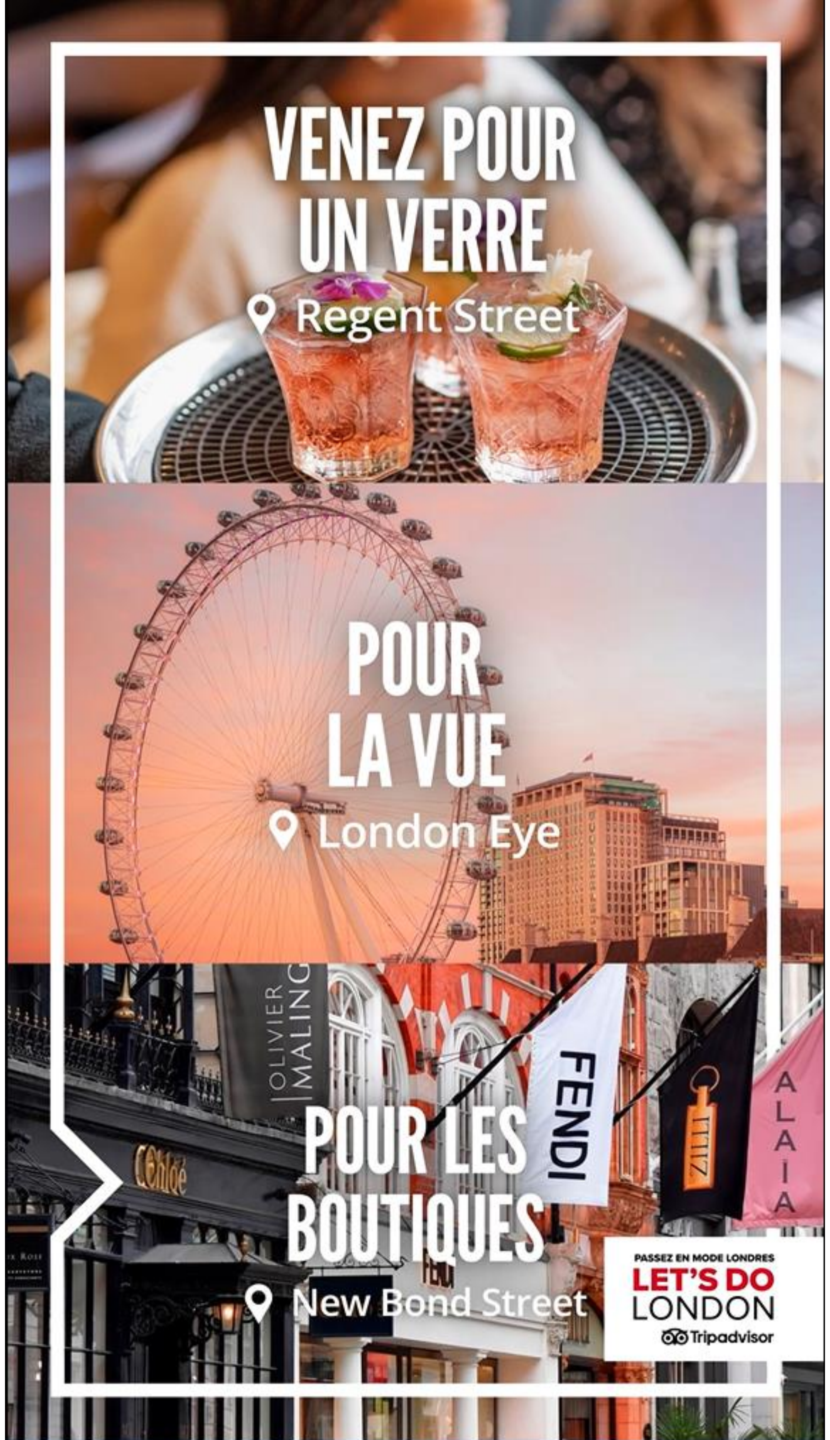
Requirement	Results	
Target market recall	11%	
Intent and consideration visit	Visited DE: 12% FR: 17%	Intend to visit DE: 35% FR: 40%
Total campaign reach (est. unique)	Germany 23,952,362	France 21,948,336
Frequency (overall)	Germany 9.4	France 11
Percentage of audience who visited London	11%	

Campaign Headlines
Let’s Do London 2023

This is our best-ever performing campaign, with improved campaign recall and influence compared to Let’s Do London 2022.

- **£162 million additional visitor spend**
- **308,000 additional visitors**
- **52:1 return on investment**

  (Let’s Do London 2022 achieved a 41:1 ROI in France and Germany)



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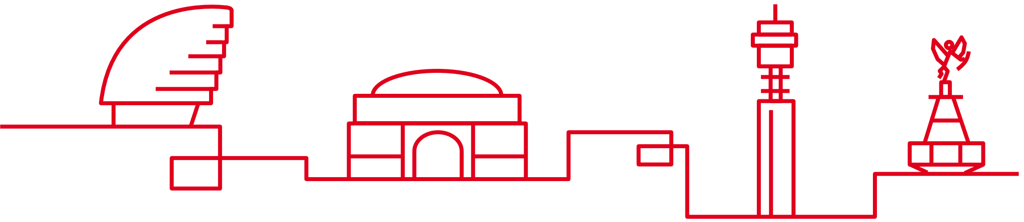
Summary of impact

The 2023 Let’s do London campaign attracted an additional 308,000 visitors to London, of which 38% were recent visitors and 62% were planners. In total, they will spend £162m in the capital. This corresponds to an additional £52 tourism money for each £1 spent on the campaign.

58% of the spend induced by the 2023 campaign came from German visitors and 42% of the spend came from French visitors.

ROI was marginally higher in Germany.



	Market	Additional tourism spend, £m	Additional visitors, 000	Campaign costs, £m	Spend ROI	Travel CO2, 000 tons	Carbon intensity, Kg CO2/£
2023	France	68	135	1.4	50:1	13.3	0.20
	Germany	94	173	1.7	54:1	32.2	0.34
	Total	**162**	**308**	**3.1**	**52:1**	**45.5**	**0.28**

	Market	Additional tourism spend, £m	Additional visitors, 000	Campaign costs, £m	Spend ROI	Travel CO2, 000 tons	Carbon intensity, Kg CO2/£
2022	France	72	154	1.8	40:1	15.2	0.21
	Germany	61	127	1.5	42:1	25.2	0.41
	Total	**133**	**281**	**3.3**	**41:1**	**40.4**	**0.30**

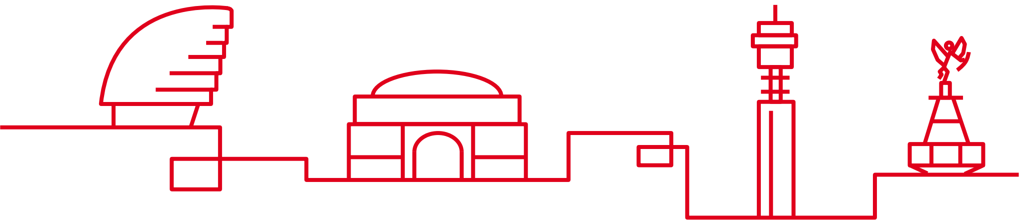
Impact context: 11% of French and German visitors to London in 2022

Visitors to London from France and Germany are yet to reach pre-Covid 2019 levels

The 308,000 international visitors that visited London as a result of the 2023 Let's Do London campaign is equivalent to 11% of all French and German visitors into London in 2022.

This is almost equivalent to 1 in 9 French and German tourists from 2022 visiting London because of the campaign.

Country	Visitors to London in 2019, m	Visitors to London in 2022, m
France	1.8	1.5
Germany	1.5	1.2
Total	3.3	2.7



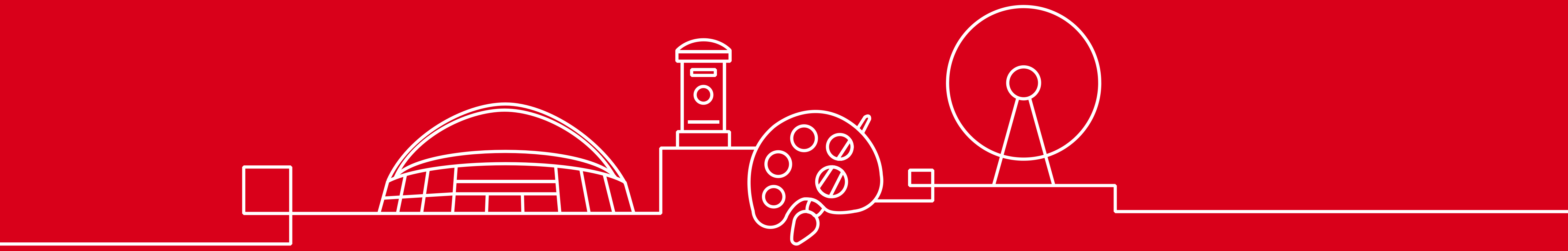
Impact context: Drivers of impact

2023	France	Germany
Budget*	£1,356,408	£1,745,652
Segment**	6,155,646	11,165,208
Spend per person	£0.22	£0.16
Recall	**11%**	**11%**
Campaign influence***	**22%**	**21%**
ROI	50	54

2022	France	Germany
Budget*	£1,500,000	£1,100,000
Segment**	6,400,000	13,300,000
Spend per person	£0.23	£0.08
Recall	**10%**	**7%**
Campaign influence***	**17%**	**13%**
ROI	40	42

*Media spend and PR only.
**18-45 year old French and German population travelling at least one short haul trip a year.
**The weighted campaign influence for planned visitors and those that have already visited

Thank you



From:	Alex Conway
To:	[redacted]; EDMT; [redacted]; [redacted]; Shonagh Manson; [redacted]
Cc:	Philip Graham; Mary Harpley
Subject:	FW: Let"s Do London campaign - 2022 final results
Date:	10 January 2023 15:53:19
Attachments:	image001.jpg

Fyi – a great outcome!

Alex

Alex Conway
Assistant Director, Economic Development and Programmes
GREATER**LONDON**AUTHORITY
[redacted]

[redacted]@london.gov.uk

From: Laura Citron <[redacted]@londonandpartners.com>
Sent: 10 January 2023 15:49
To: Mayor [redacted] [redacted]@london.gov.uk>
Cc: Rajesh Agrawal [redacted]@london.gov.uk>; Justine Simons [redacted]@london.gov.uk>; [redacted]@london.gov.uk>; Richard Watts [redacted]@london.gov.uk>; Philip Graham [redacted]@london.gov.uk>; Alex Conway [redacted]@london.gov.uk>; [redacted]@londonandpartners.com>; [redacted]@londonandpartners.com>; Niran Mothada <[redacted]@london.gov.uk>; [redacted]@london.gov.uk>; [redacted]@london.gov.uk>; Ali Picton [redacted]@london.gov.uk>; [redacted]@londonandpartners.com; Sarah Brown [redacted]@london.gov.uk>
Subject: Let's Do London campaign - 2022 final results

CAUTION: This email originated from outside this organisation. Do not click links or open attachments unless you recognise the sender and know the content is safe.

Dear Sadiq,

We've now got the final results from the *Let's Do London* campaign in 2022 (feels a long time ago that we were on Times Square with SIX!).

The campaign was one part of your unprecedented package of support to bring visitors back to London. We've also been winning events, building capability in the industry, creating support networks, sharing insights, and running our VisitLondon channels. All of this has built real confidence in our visitor economy, and in your support for the sector.

The *Let's Do London* campaign generated an additional **£289 million in spend** and an additional **585,000 visitors** to London, with an **ROI of 28:1.** The details are in the table below.

We need to keep up the momentum. Here's the plan:

As you know, the industry came together around a shared **Tourism Vision for 2030**. It's all about making London a brilliant experience for visitors and Londoners alike. Our focus this year is on turning that into a practical strategy that we can deliver, in partnership with industry.

We'll also keep bringing visitors into London through ***Let's Do London 2023*** and winning more events**.**

Thank you for your leadership on this and for your confidence in us. And thank you to all the GLA colleagues whose support made this possible.

Looking forward to 2023,

Laura

Let's Do London Summary Impact Final Results

Market	Additional tourism spend, £m	Additional visitors, 000	Campaign costs, £m	ROAS (Spend ROI)	Add. travel CO2, 000 tons	Carbon intensity, Kg CO2/£
USA	126	155	5.2	24:1	204	1.63
France	72	154	1.8	40:1	8	0.11
Germany	61	127	1.5	42:1	13	0.21
UK	29	149	2.0	15:1	2	0.06
Total	**289**	**585**	**10.5**	**28:1**	**227**	**0.78**

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