

An aerial photograph of London, England, taken during the golden hour of sunset. The sun is low on the horizon, casting a warm, golden glow over the city. The River Thames flows through the foreground, with several boats visible. The London Eye is prominent in the middle ground, and the dense urban landscape of London extends to the horizon, with the Shard skyscraper being a notable landmark in the background.

LET'S LONDON

Performance report #8 27 September 2021

LONDON
& PARTNERS



Let's Do London performance report

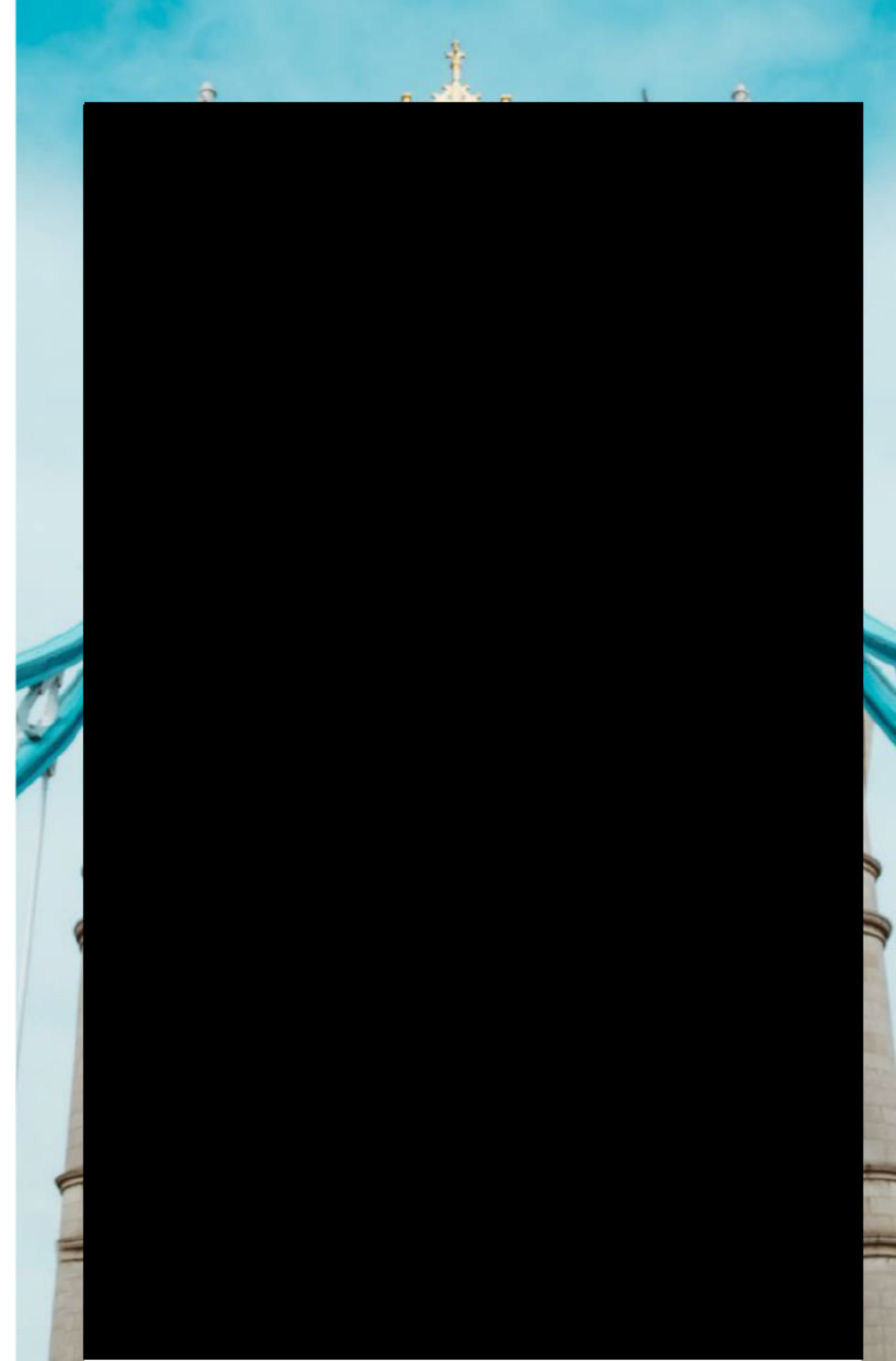
About Let's Do London

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.

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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.**

The background is a collage of images. At the top, there are strings of warm white lights against a dark sky. On the right side, there are green plants with bright pink flowers. At the bottom, there are blurry images of people sitting at tables, possibly in an outdoor cafe or restaurant setting. A large, solid green rectangular box is positioned on the left side of the image, containing the text 'Campaign performance' in white.

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.

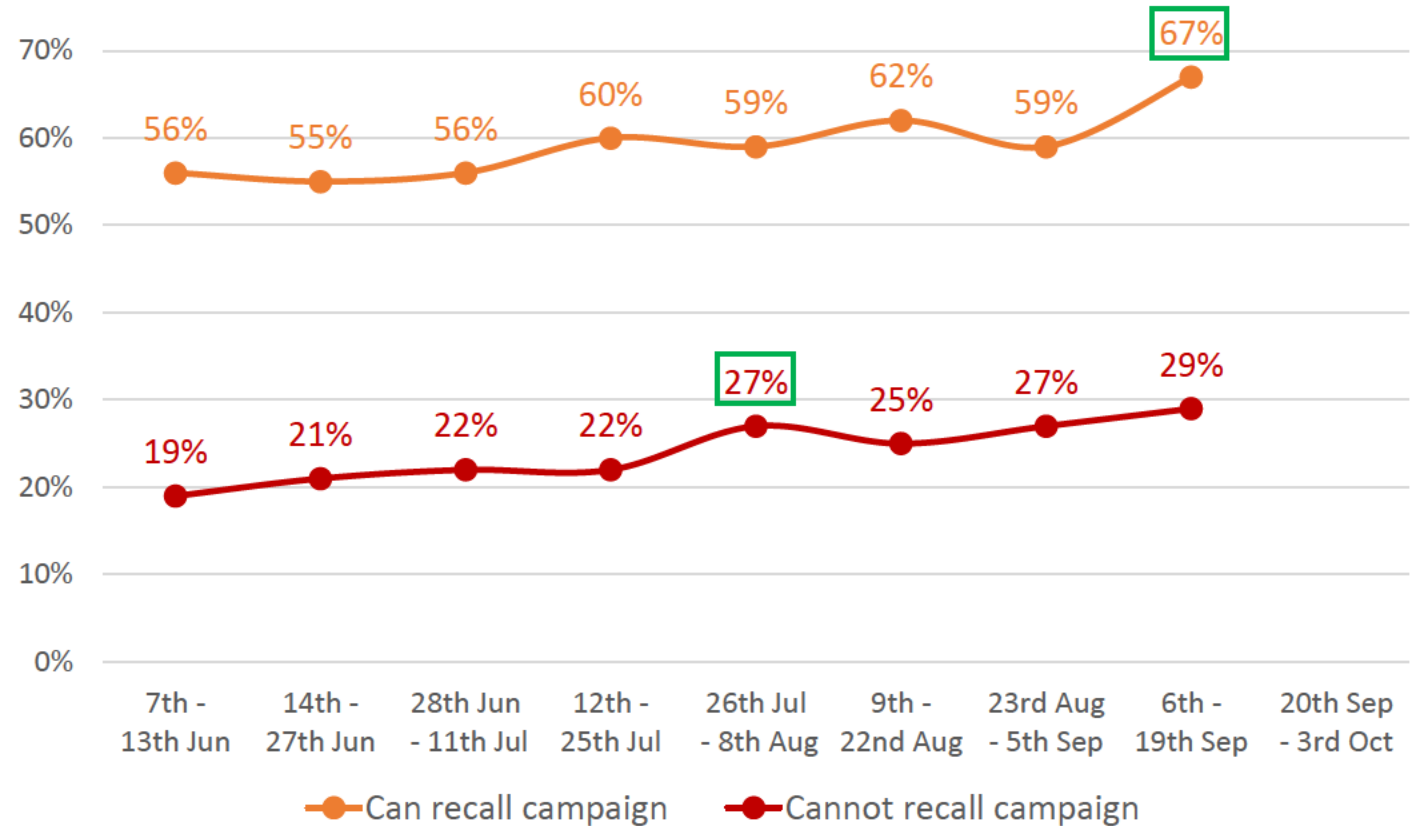
They are more than twice as likely to have visited than those who cannot recall the campaign.

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



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.

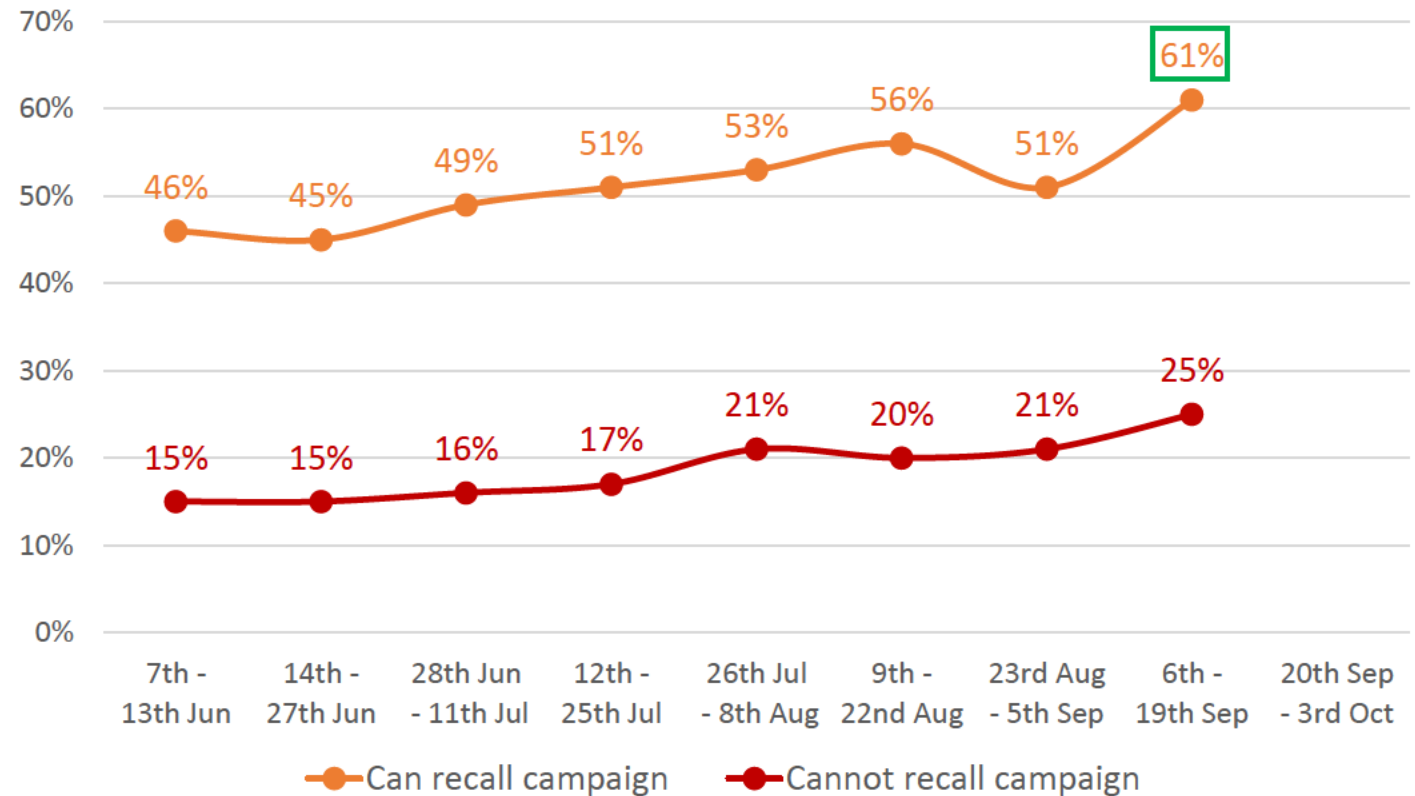
They continue to be **2.5 times more likely to have visited London than those who cannot recall the campaign.**

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



Intentions to visit London

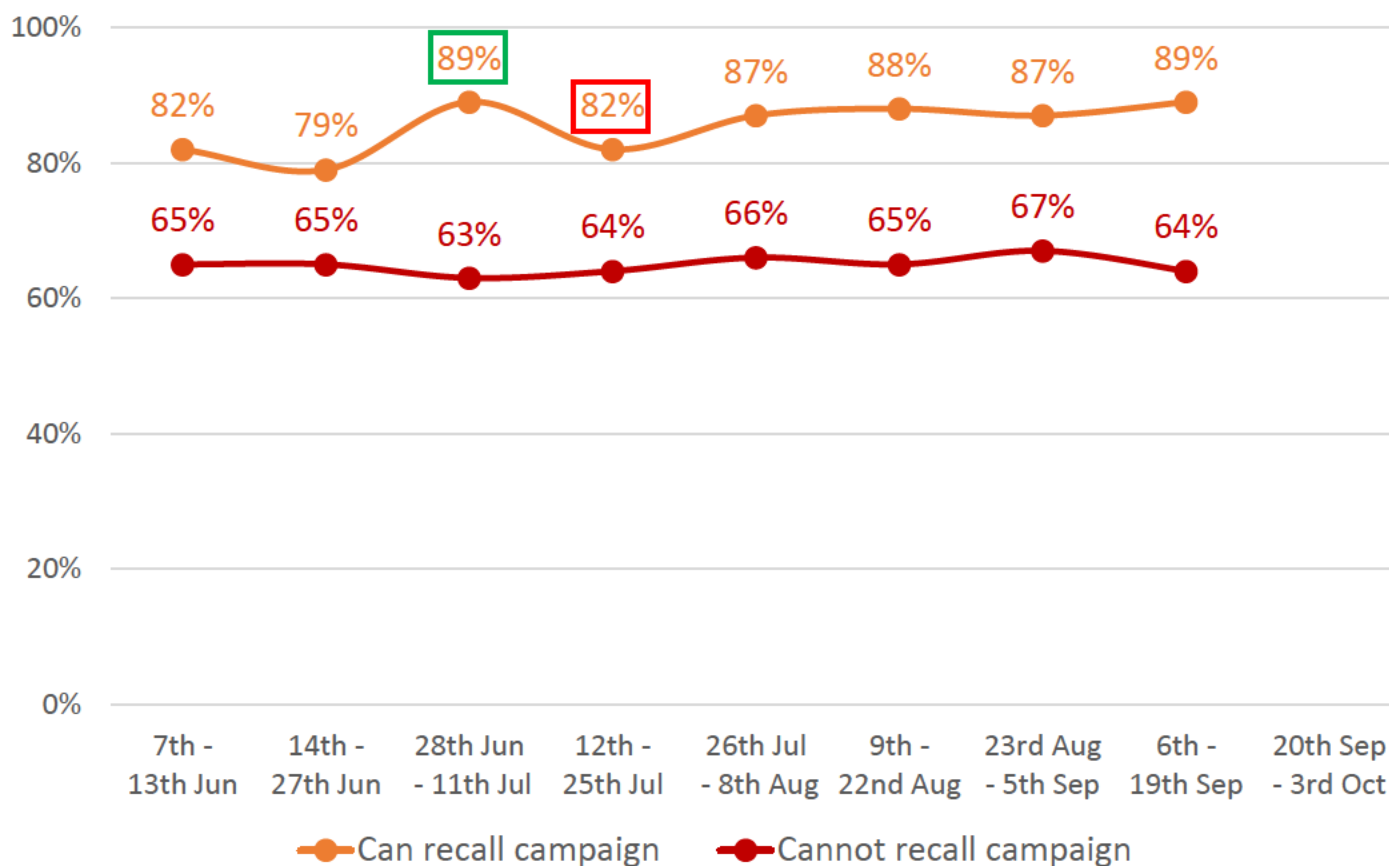
Intent to visit London in the next year remains stable.

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.



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=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.

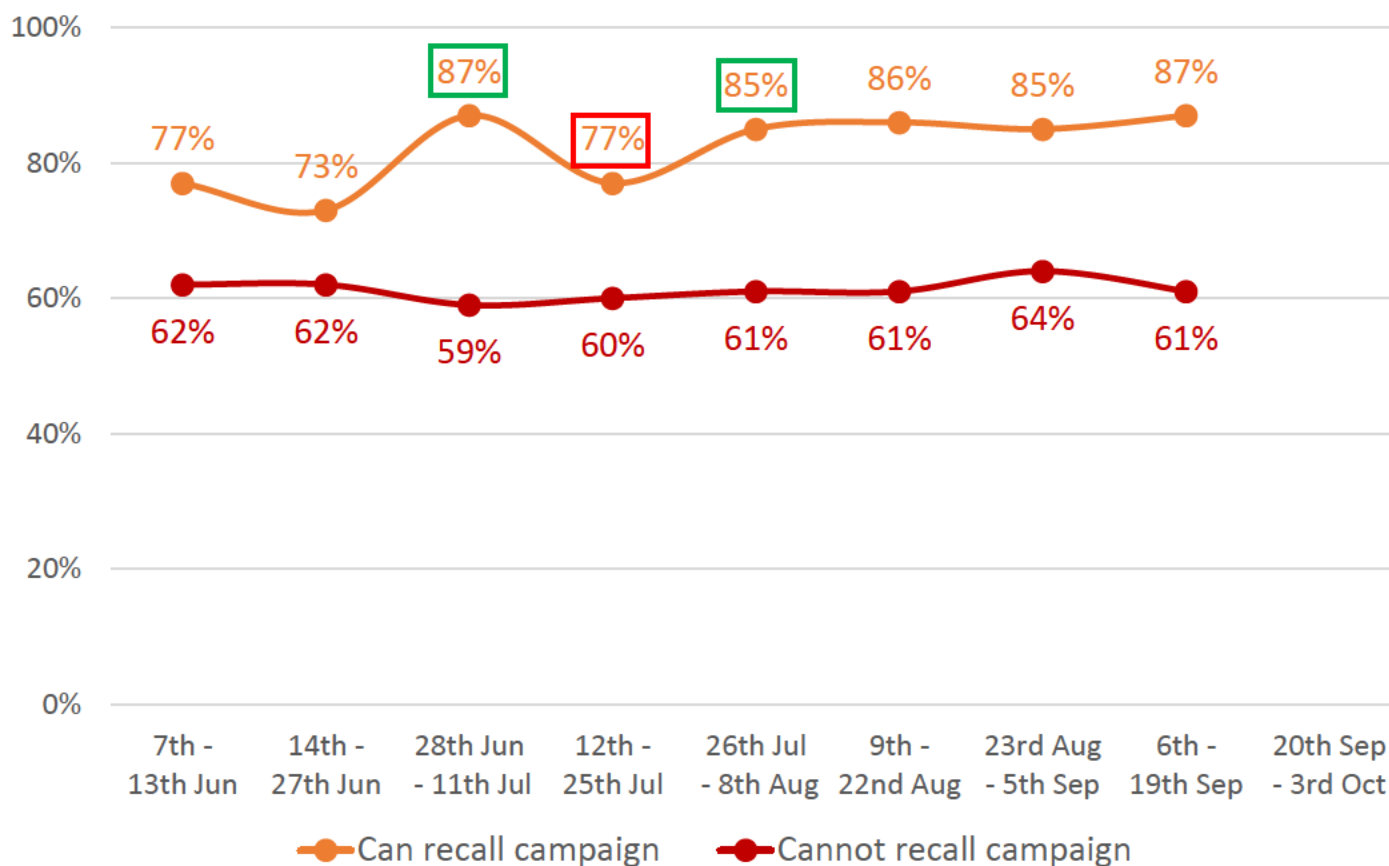
Domestic intent (excluding Londoners)

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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Whether they intend to visit* in the next year (All regions excl. 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+ 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

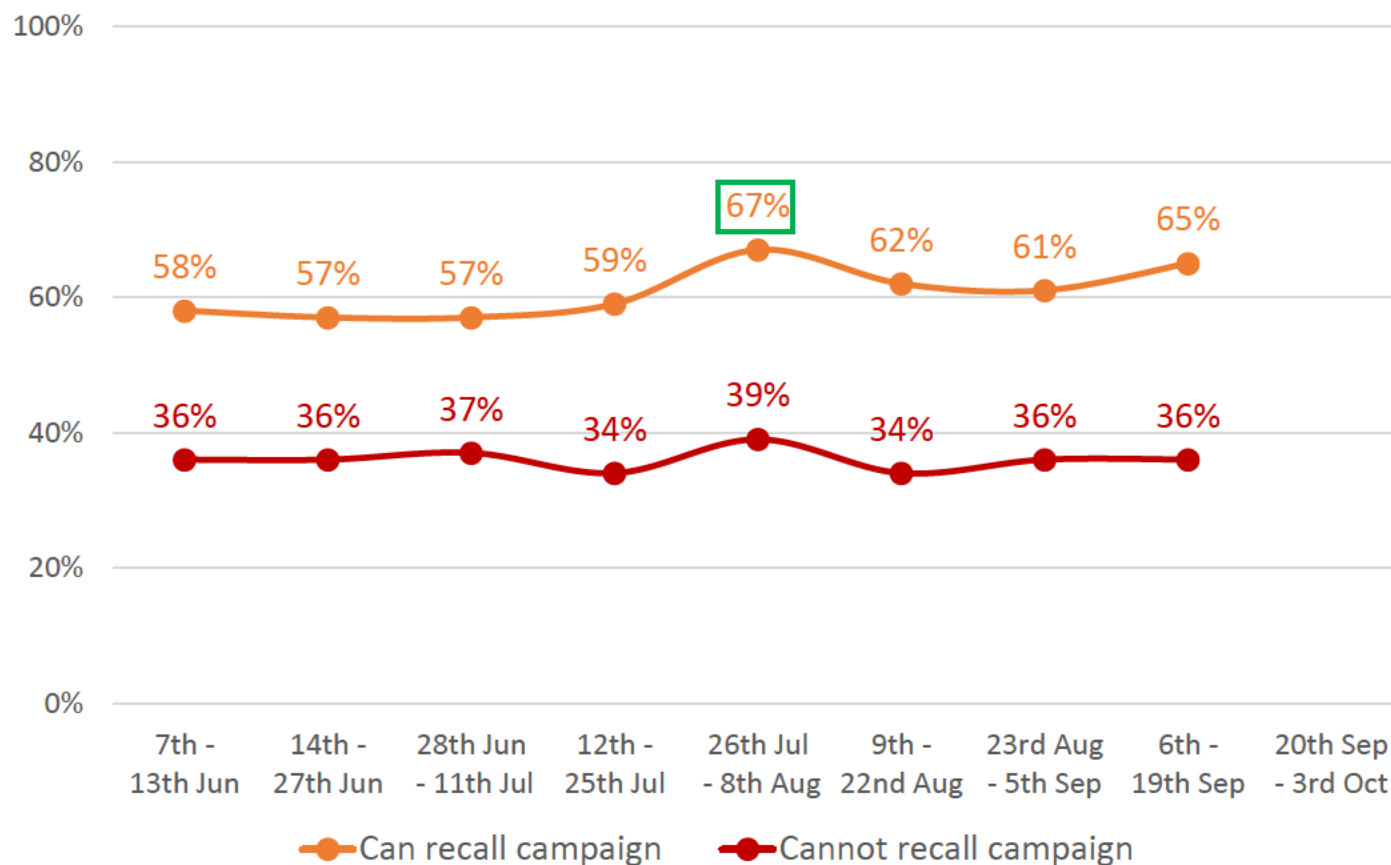
Intent to visit London in the next 3 months has seen a small increase amongst those who can recall the campaign.

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)

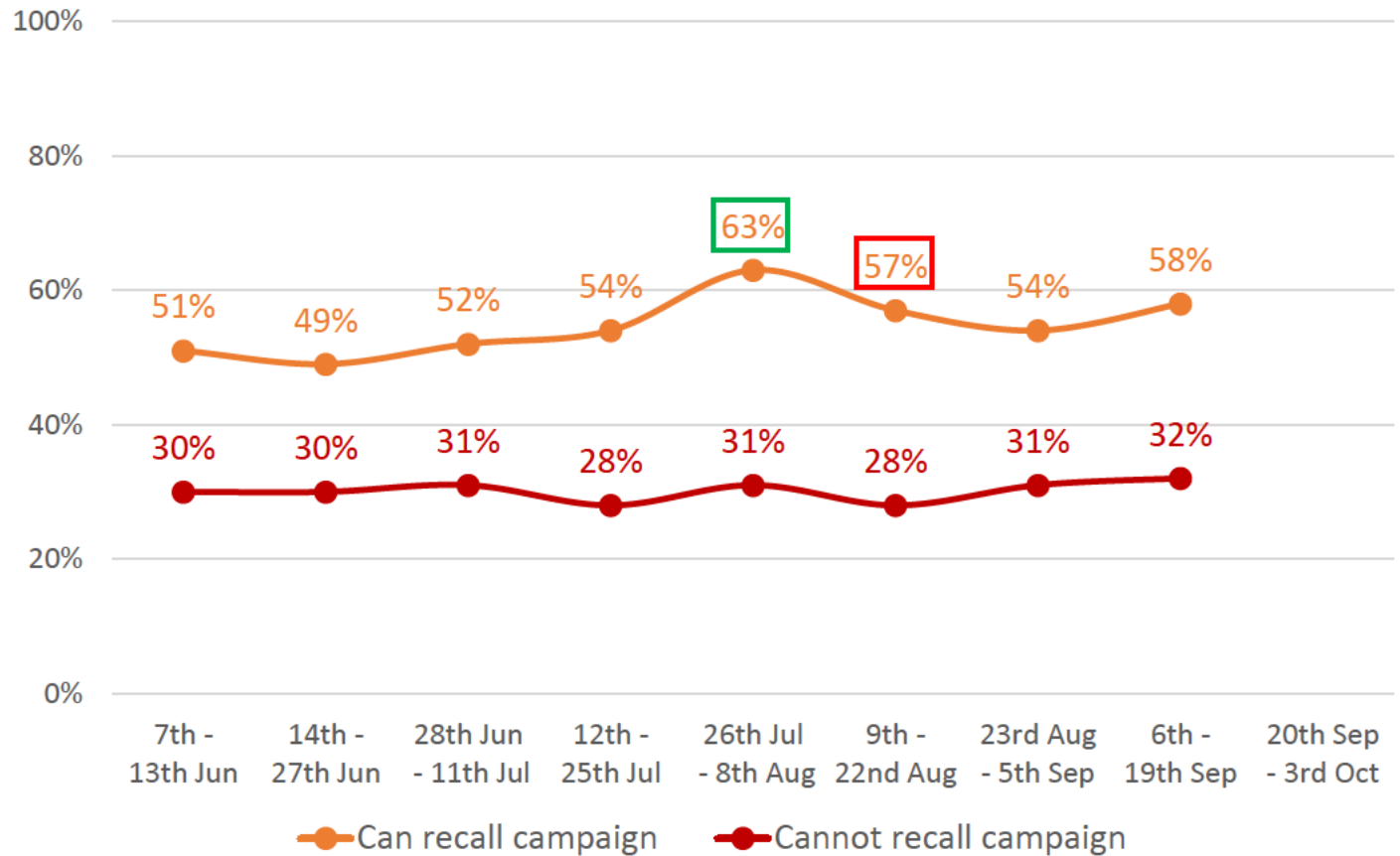
Intent to visit London in the short-term has increased again following a dip in the last fortnight.

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.



Whether they intend to visit* in the next 3 months (All regions excl. 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+ 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.

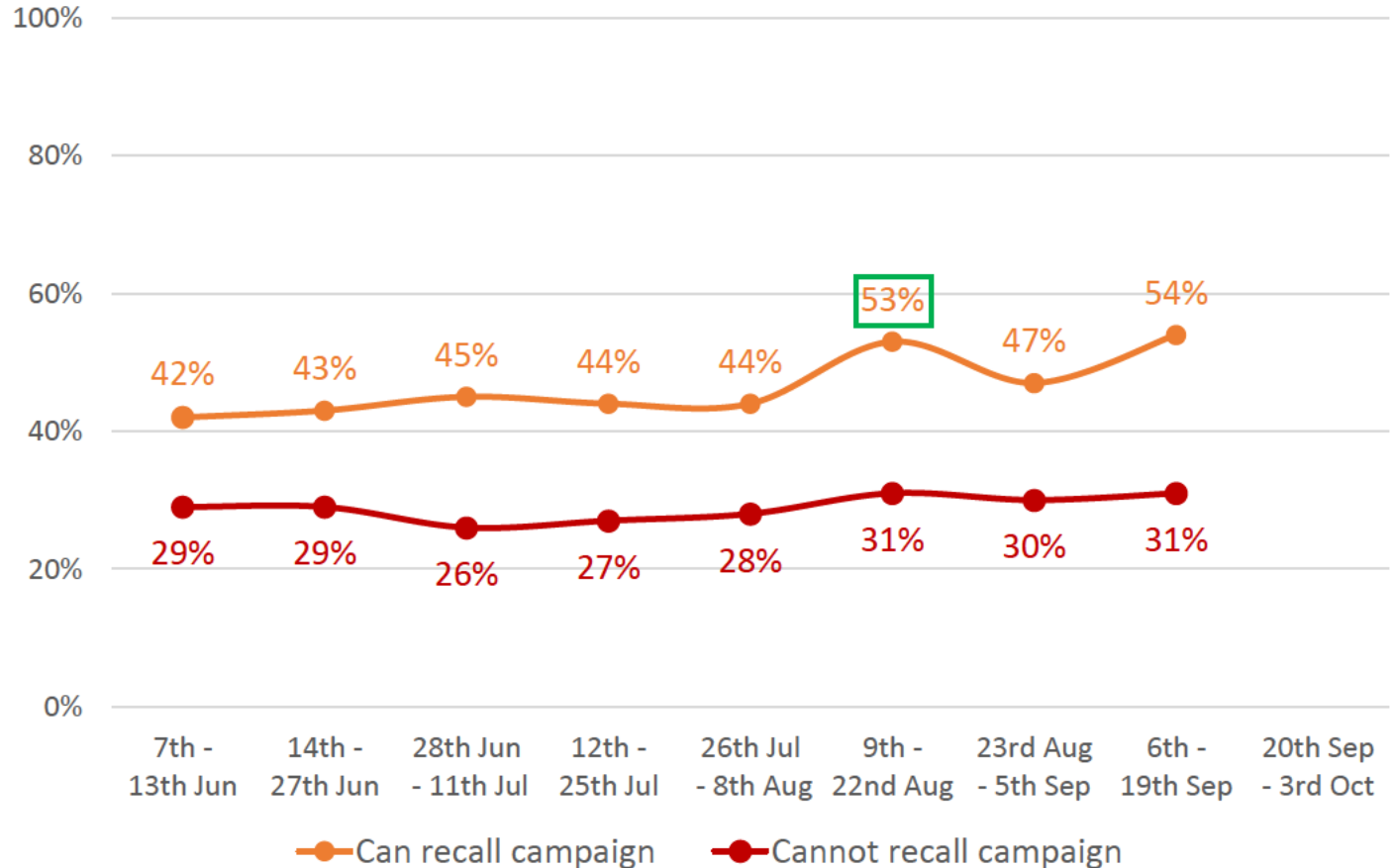
Confidence to visit London

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.



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)

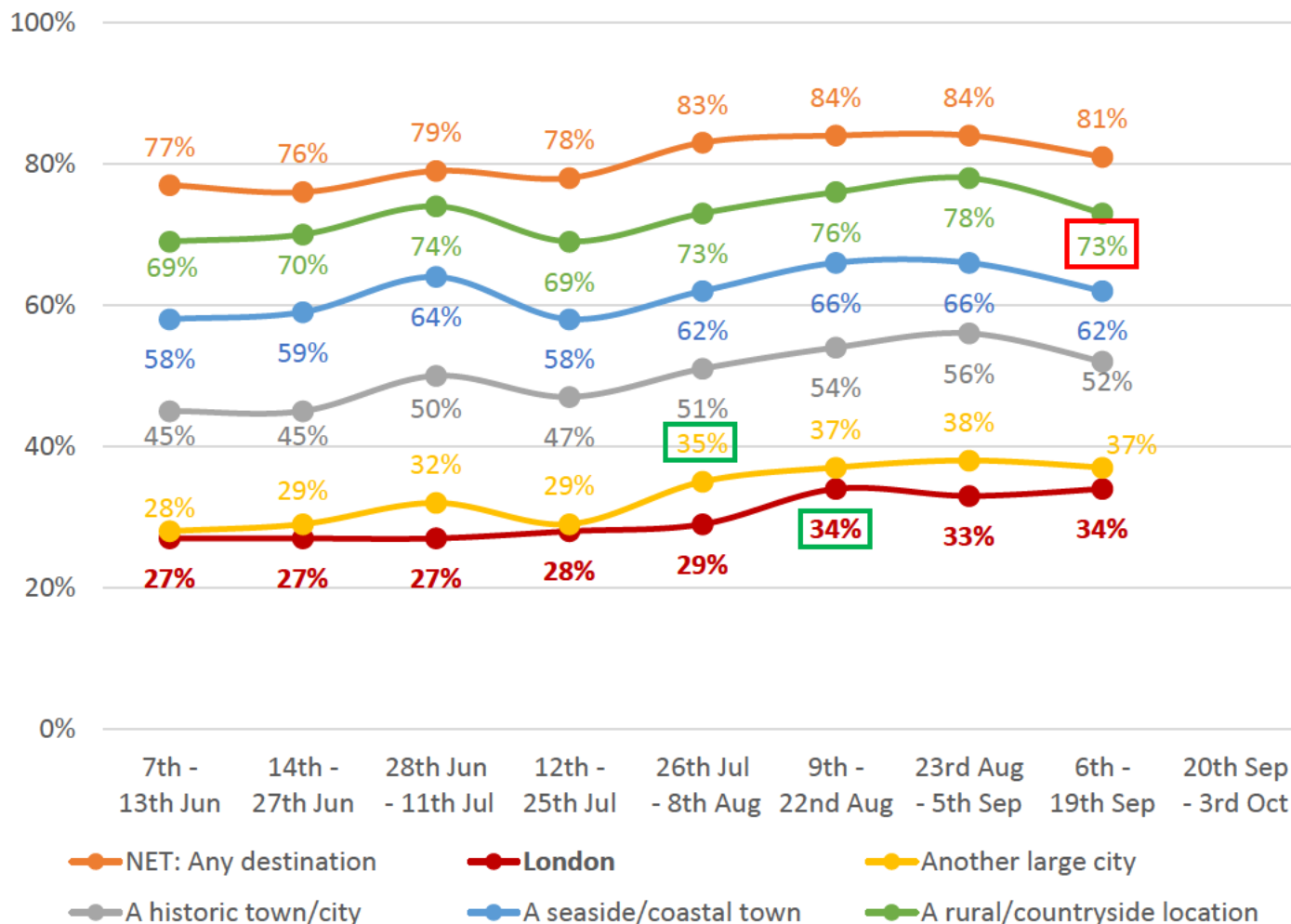
Amongst those living outside of London, there has been no change in levels of confidence in visiting London – it remains at one-third. London remains the destination that people feel least comfortable visiting.

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.



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.

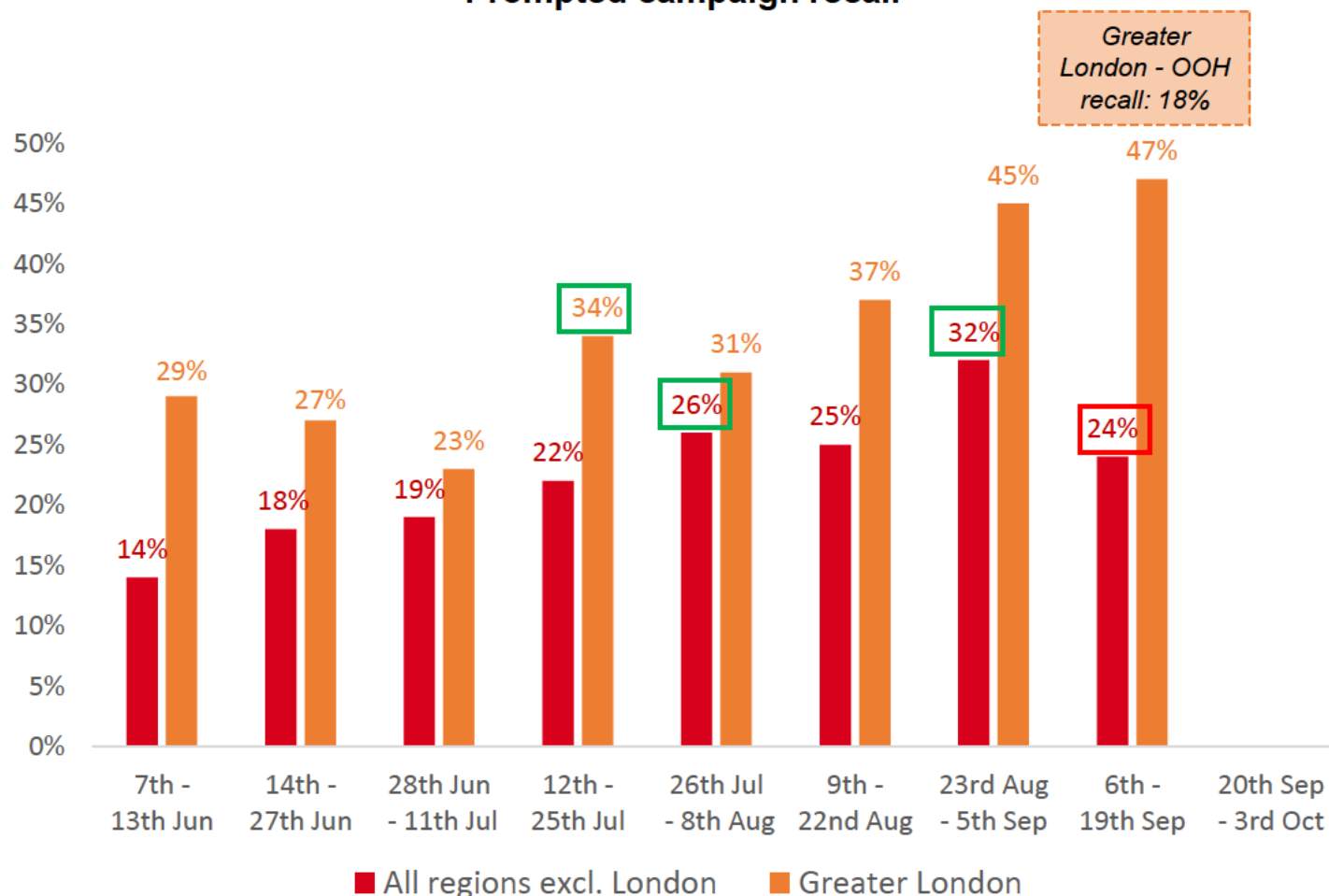
Campaign recall

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.

Prompted campaign recall



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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

An aerial photograph of London at sunset. The sky is filled with orange and yellow clouds, and the city lights are beginning to glow. The River Thames flows through the center, with several bridges visible. St. Paul's Cathedral is a prominent landmark in the middle ground. A blue rectangular box is overlaid on the left side of the image, containing white text.

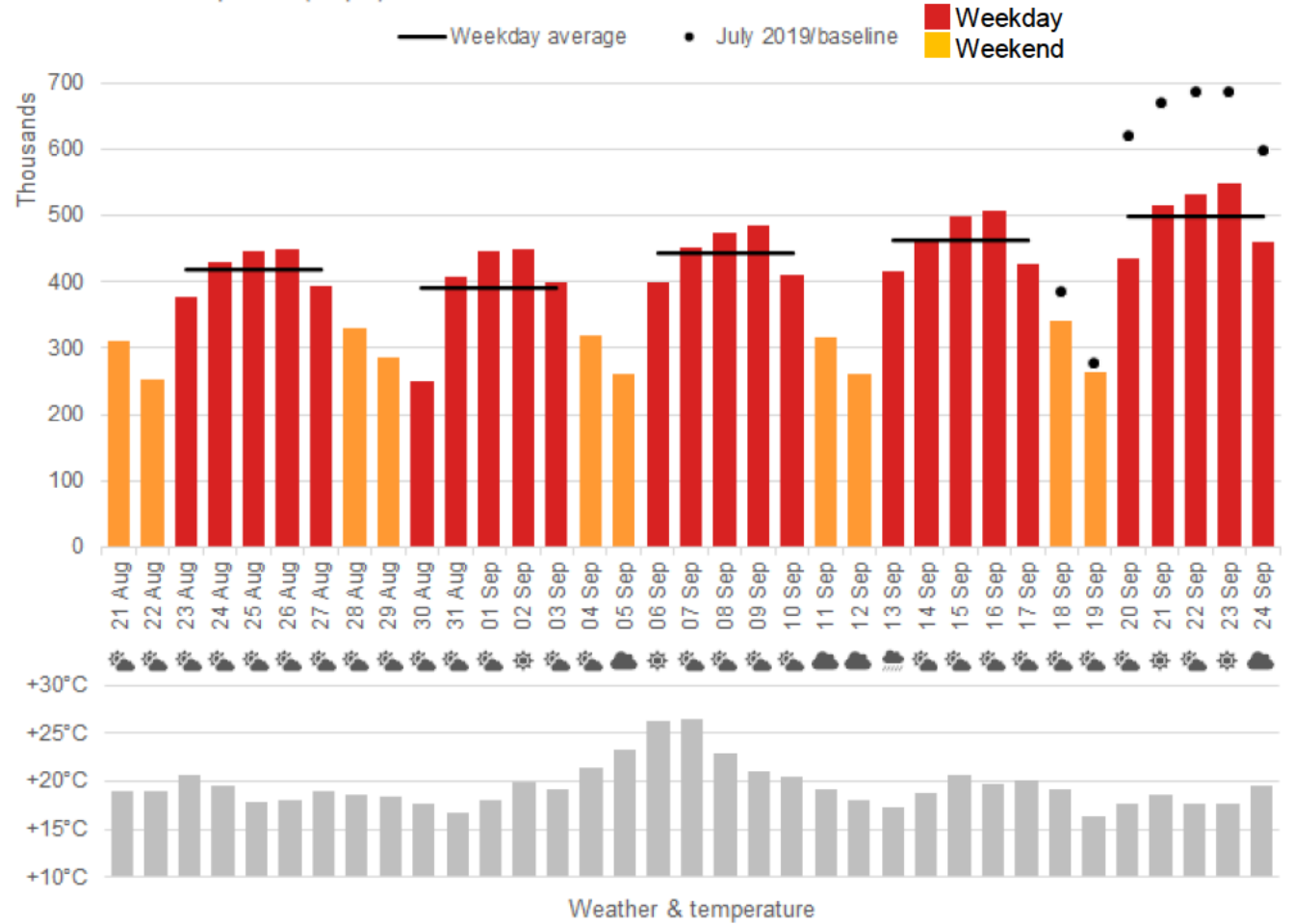
London recovery trends

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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Visitor counts comparison (12 pm)

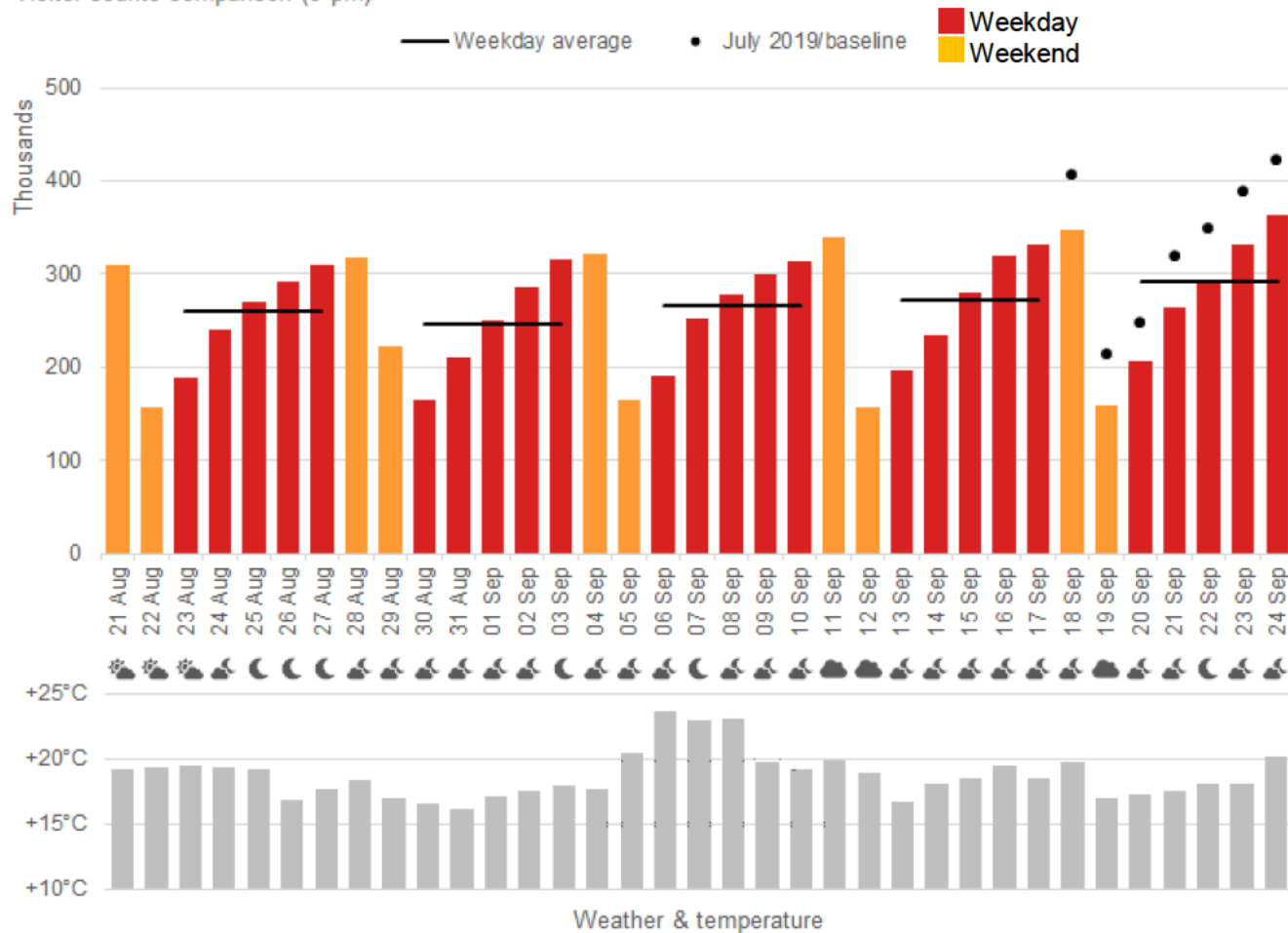


Evening visits

- 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

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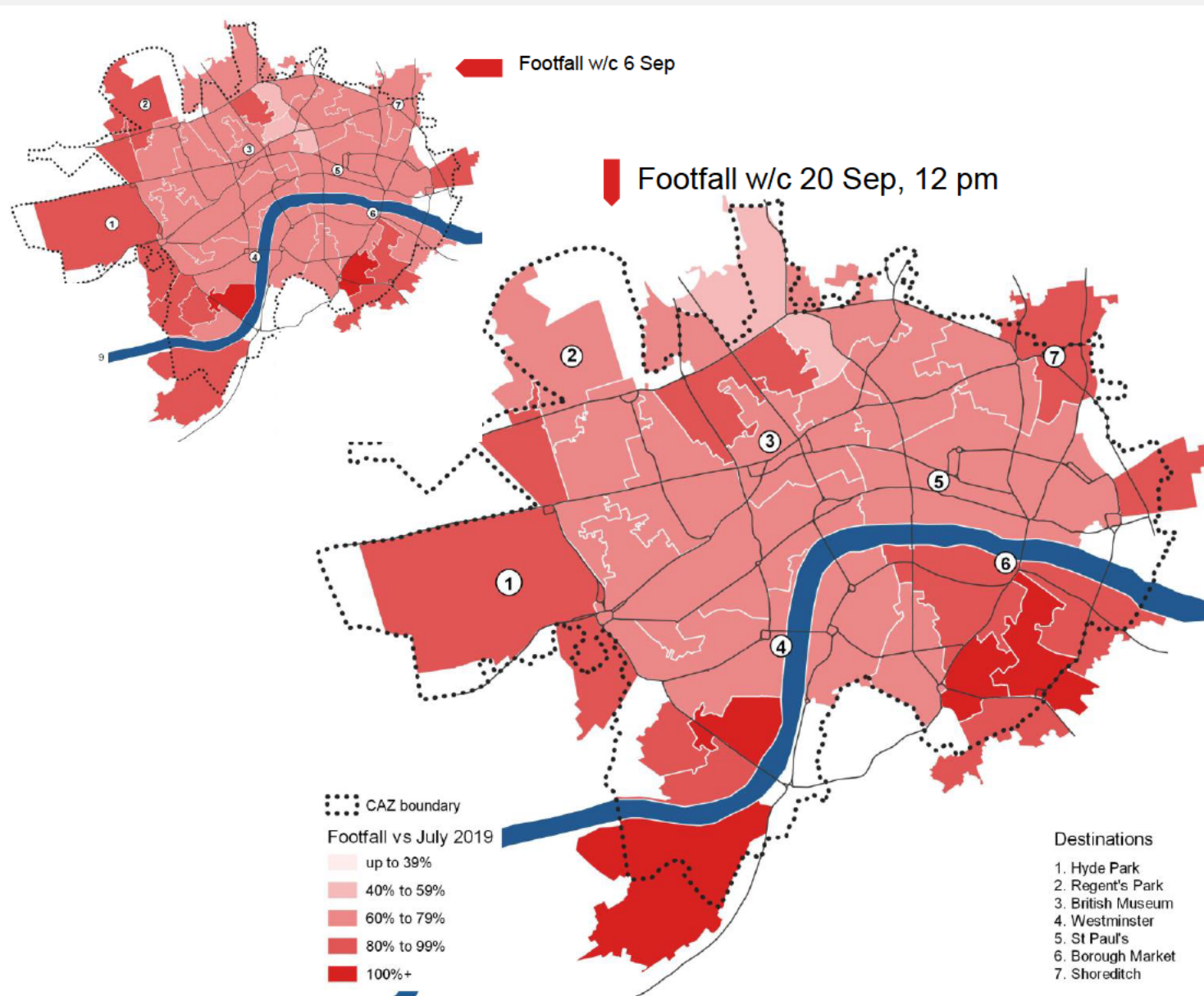
Visitor counts comparison (8 pm)



Daytime visits

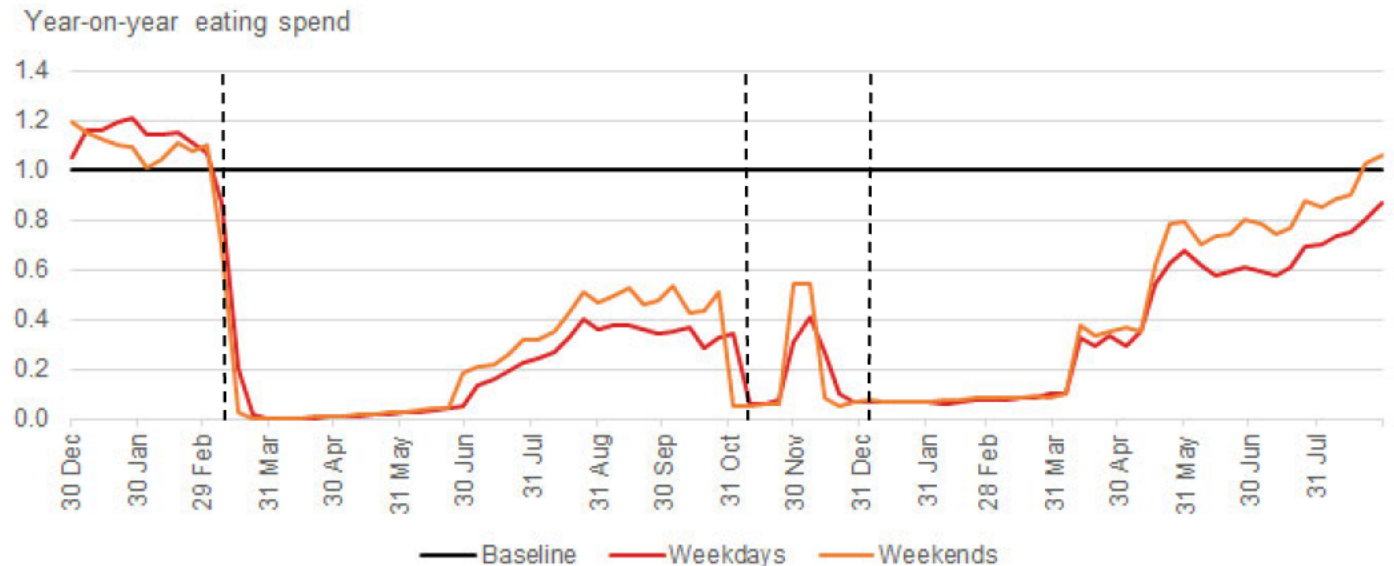
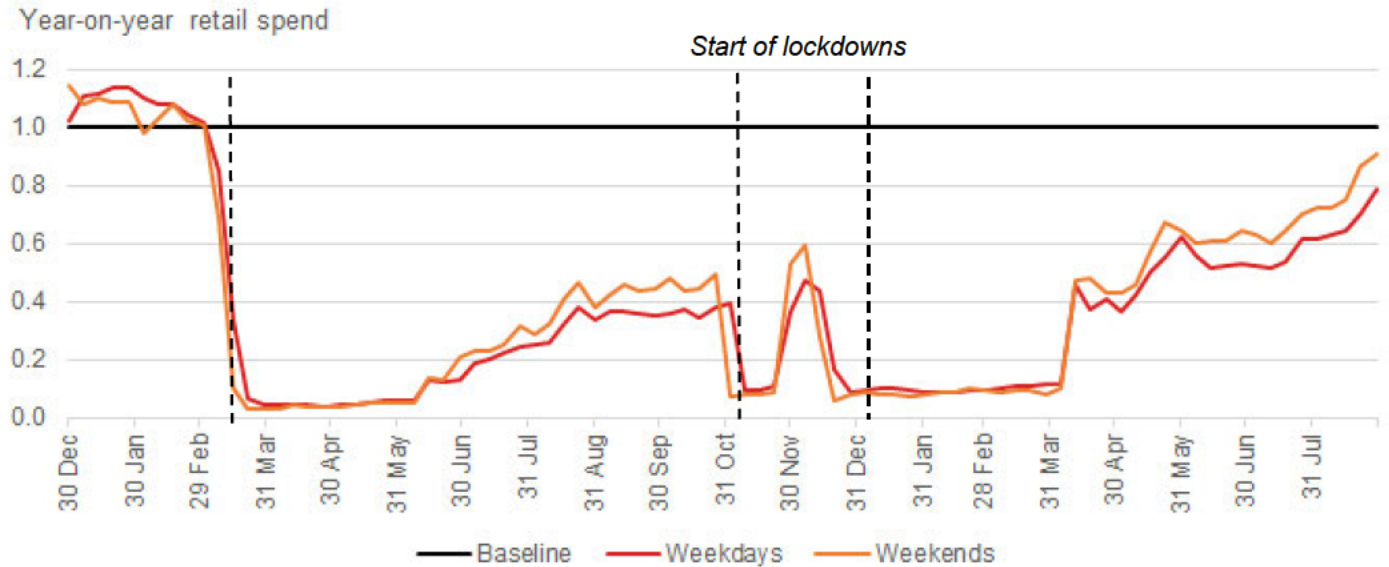
- East-central London visitor footfall caught up to west-central in the last report and appears to have maintained those levels in recent weeks
- The area around Kings Cross/St Pancras has the weakest recovery, possibly due to lack of international passengers

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Spending

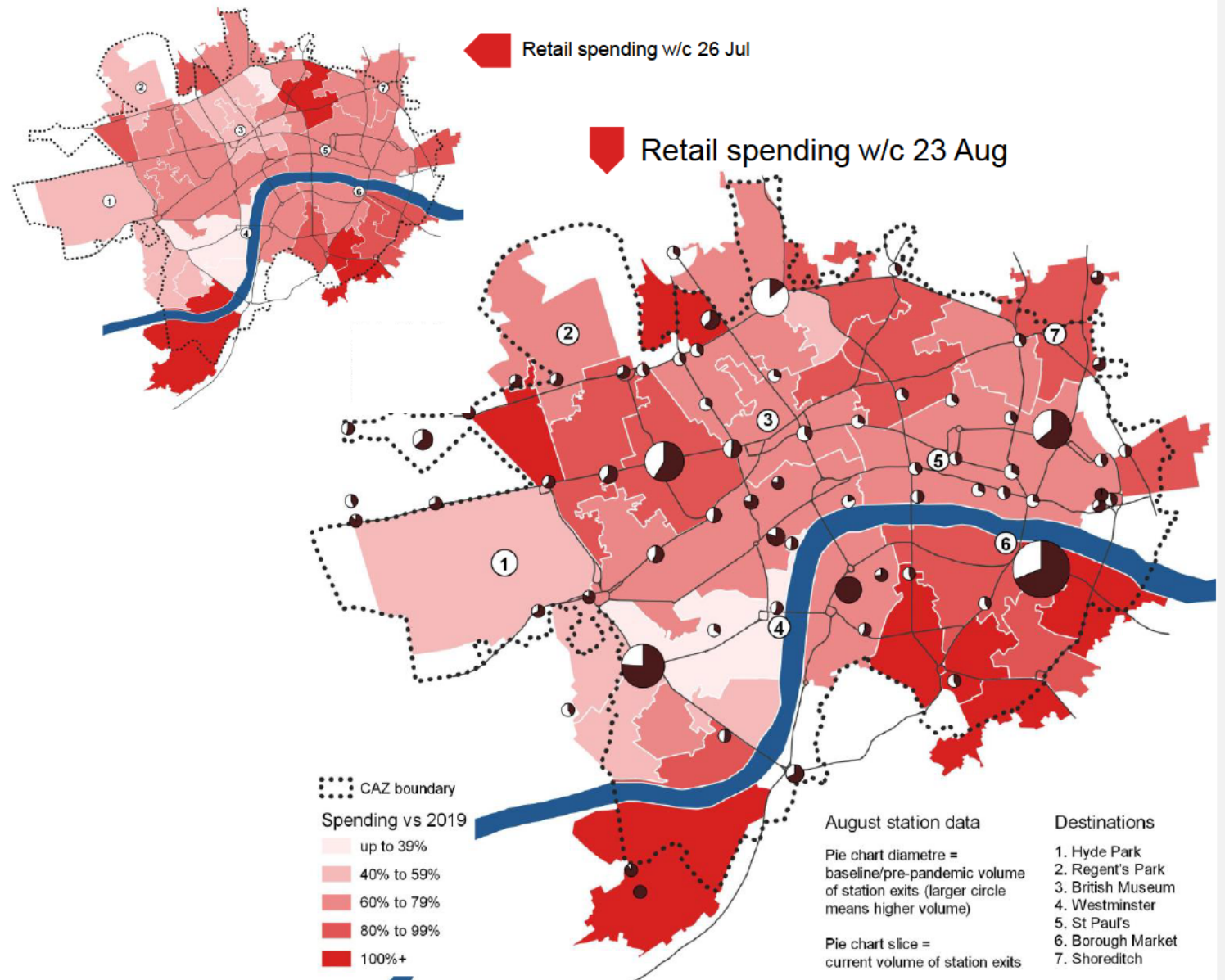
- Spend in central London is at 80% or higher compared to 2019, led by weekend eating
- Spending appears to have climbed steadily throughout school holidays across both categories and weekdays/weekends



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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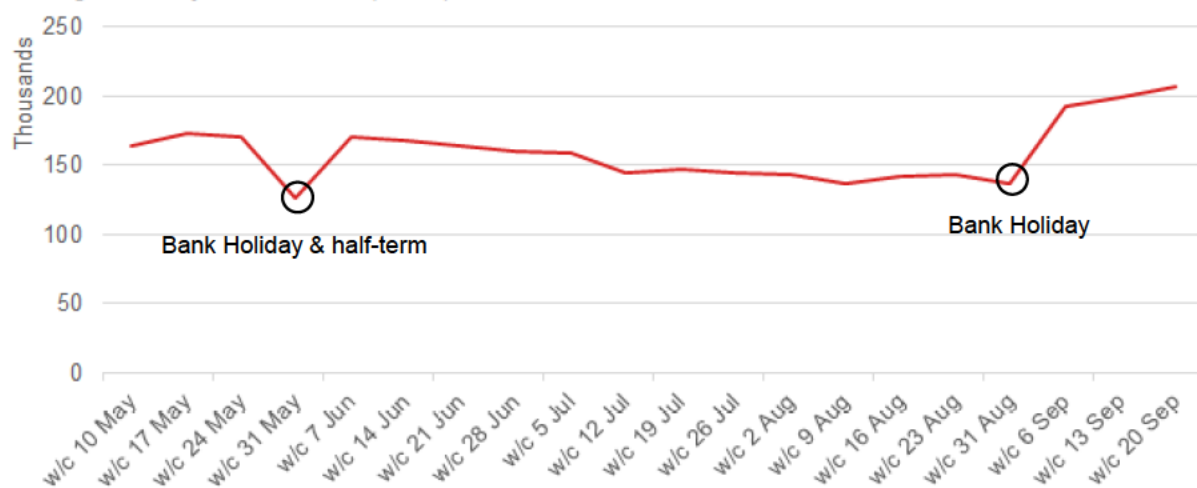


Daytime workers

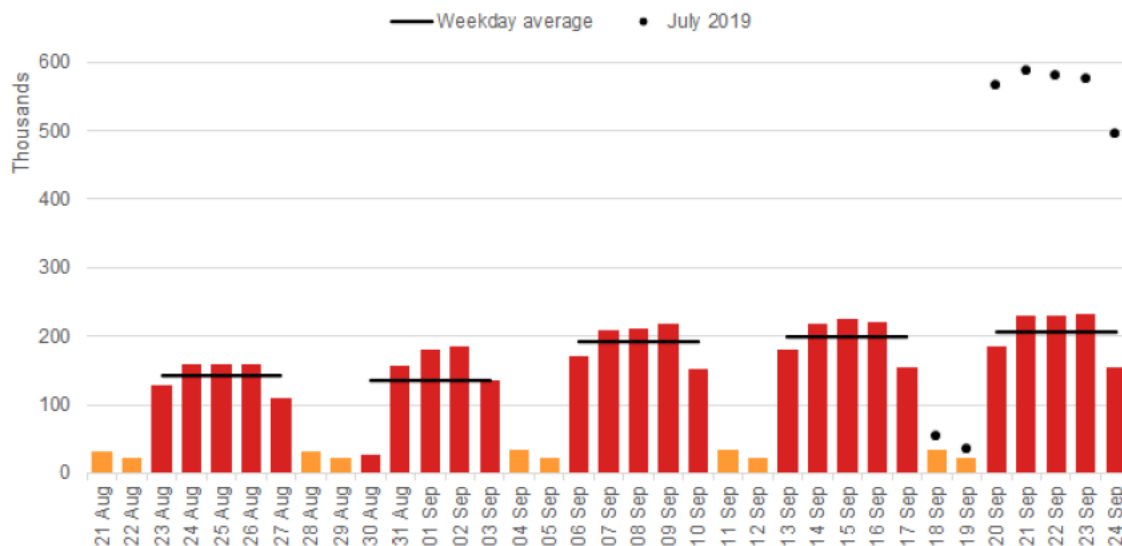
- **Weekday worker** numbers continue to climb, breaking 200k for the first time; now at around 37% of pre-pandemic levels
- Weekday worker numbers are 30k-45k lower on Mondays and Fridays
- **Weekend worker** numbers in recent weeks have been around 65% of usual, similar to figures in previous months

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Average weekday worker counts (10 am)



Worker counts comparison (10 am)





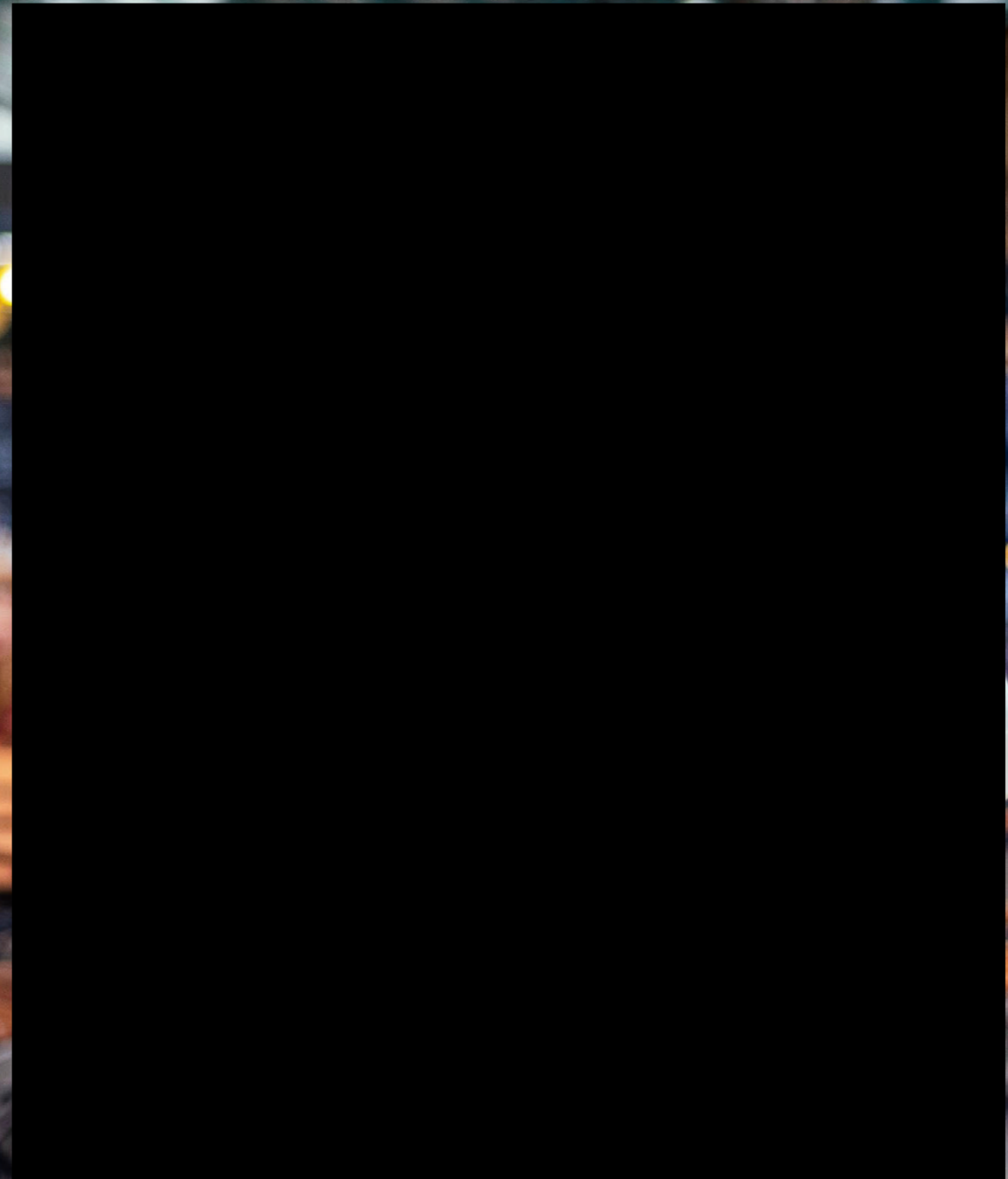
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about Let's Do London:

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

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

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& PARTNERS

MAYOR OF 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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