



London destination report



VisitEngland Destination tracker:

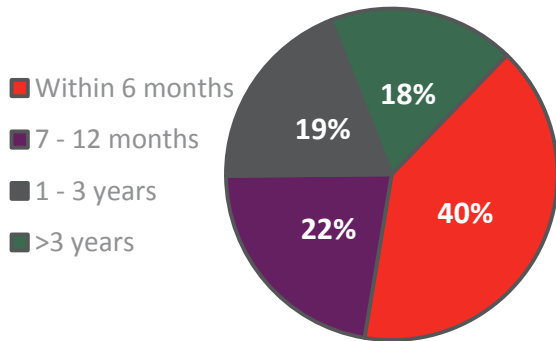
- Since April 2015, the national tourist boards of VisitEngland, VisitScotland and VisitWales have been tracking visitor perceptions of holiday destinations across GB in a single research vehicle.
- Data in this report is from April 2015 – September 2016
- This study explores **behavioural and experience measures** such as, visitation, spend, stay length, satisfaction and advocacy within individual destinations. As well as the **imagery perceptions** of each destination.
- In the report there are 3 samples for comparison; those from whom this destination was the most recently visited, those who claim to visit a city destinations at C52 and finally a GB average.
- All respondents are GB holiday takers, having taken a GB break in the past 12 months or are expecting to in the next 12 months. This accounts for approx. 49% of the population.
- Significant differences will be indicated by a **black**↑/**orange**↓ arrow against city destinations and a **blue**↑/**red**↓ against GB.
- This report provides a snapshot of:
 1. A demographic split of destination visitors
 2. The behaviours exhibited at the destination: How loyal are they to the destination and how satisfied were they with their trip?
 3. How GB holiday makers perceive this destination and how does it compare with others?
- Finally there is a summary of findings.

Who is visiting?

Ever Visited London :

84%

Time since last visit



*Please note respondents can have visited more than one destination in the last 3 years

Visited destination in the last 3 years

Gender	London	Cities	Great Britain
Male	51%	51%	49%
Female	49%	49%	51%

Age	London	Cities	Great Britain
18-24	14%	16%	14%
25-34	18%	18%	16%
35-44	17%	17%	17%
45-54	18%	18%	18%
55-64	16%	15%	15%
65+	16%	16%	20%

Region of origin	London	Cities	Great Britain
Wales	7%↑↑	5%	5%
Scotland	8%	10%	9%
North East	3%	5%	4%
North West	12%	12%	11%
Yorkshire/ Humberside	8%	8%	9%
East Midlands	8%	7%	7%
West Midlands	12%↑	8%	9%
East Anglia / East of England	7%↓↓	10%	10%
Greater London	12%	13%	13%
South East	15%↑	12%	14%
South West	8%	9%	9%

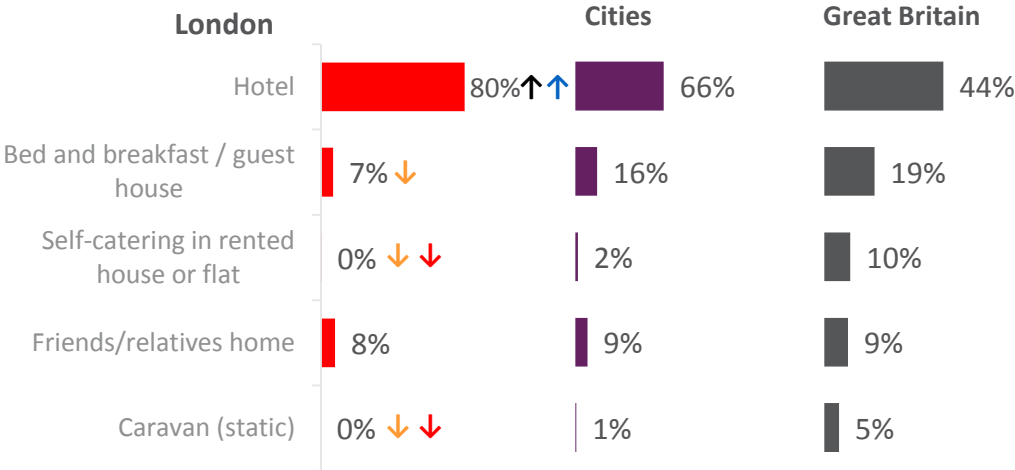
OVERALL LONDON HAS A HIGH LEVEL OF DOMESTIC VISITORS. CITY DESTINATIONS GENERALLY SEE A SKEW TOWARD YOUNGER VISITORS, HOWEVER, LONDON ATTRACTS A LEVEL OF 18-24 VISITORS IN LINE GREAT BRITAIN, WHEREAS OTHER CITIES HAVE A HIGHER SKEW TO THIS YOUNGEST AGE GROUP.

Base: London reduced destination list n=549 London last 3 years reduced destination list n=450 City destination n= 4115 total base n=12771

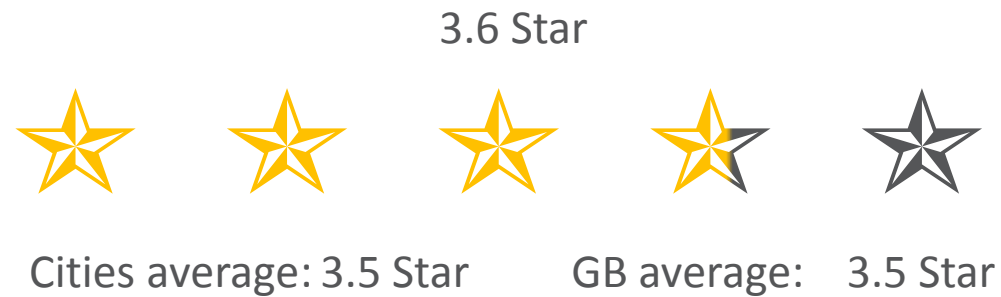
Significant differences will be indicated by a black↑/orange↓ arrow against city destinations and a blue↑/red↓ against GB

Where are they staying? – among most recent visitors

Accommodation type (Top 5)



Accommodation Quality Average (claimed)



Accommodation Quality	London	Cities	Great Britain
1 star	1%	1%	1%
2 star	5%	6%	6%
3 star	30% ↓↓	36%	36%
4 star	42% ↑↑	36%	33%
5 star	10% ↑	8%	7%
Don't know/ Can't Remember	12%	13%	17%

OVERWHELMINGLY THOSE WHO STAY IN LONDON ARE STAYING IN HOTELS COMPARED TO OTHER KINDS OF ACCOMMODATION. LONDON VISITS ARE TWICE AS LIKELY TO INVOLVE A HOTEL STAY THAN THE GB AVERAGE.

Base: Most recently visited destination n=887 City destination n= 4115 total base n=12179
Question name: In tables

Significant differences will be indicated by a black ↑/orange ↓ arrow against city destinations and a blue ↑/red ↓ against GB

Consideration, satisfaction & intention to visit

Loyalty Ladder	London destination average	Cities destination average*	Great Britain destination average*
Loyal (I often/sometimes take holidays there and intended to in the next year/couple of years)	65%	17%	17%
Considerers (I have been/never been to this destination before but would like to in the future)	21%	49%	48%
Rejecters (I have been/never been to this destination before and am not likely to do so in the future)	10%	24%	26%
Satisfaction	52%	46%	48%
Likelihood to revisit	9.2	8.6	8.4
Base n=	549/887	4115	12179

HIGH LEVELS OF LOYALTY AND LIKELIHOOD TO REVISIT CONTRIBUTE TO THE HIGH LEVELS OF VISITATION TO LONDON. THE CAPITAL HAS BEEN VISITED BY 9 OUT OF EVERY TEN PEOPLE AT ONE TIME OR ANOTHER, WITH HALF SATISFIED WITH THEIR LAST VISITED AND NEARLY ALL CLAIMING THAT THEY WILL RETURN.

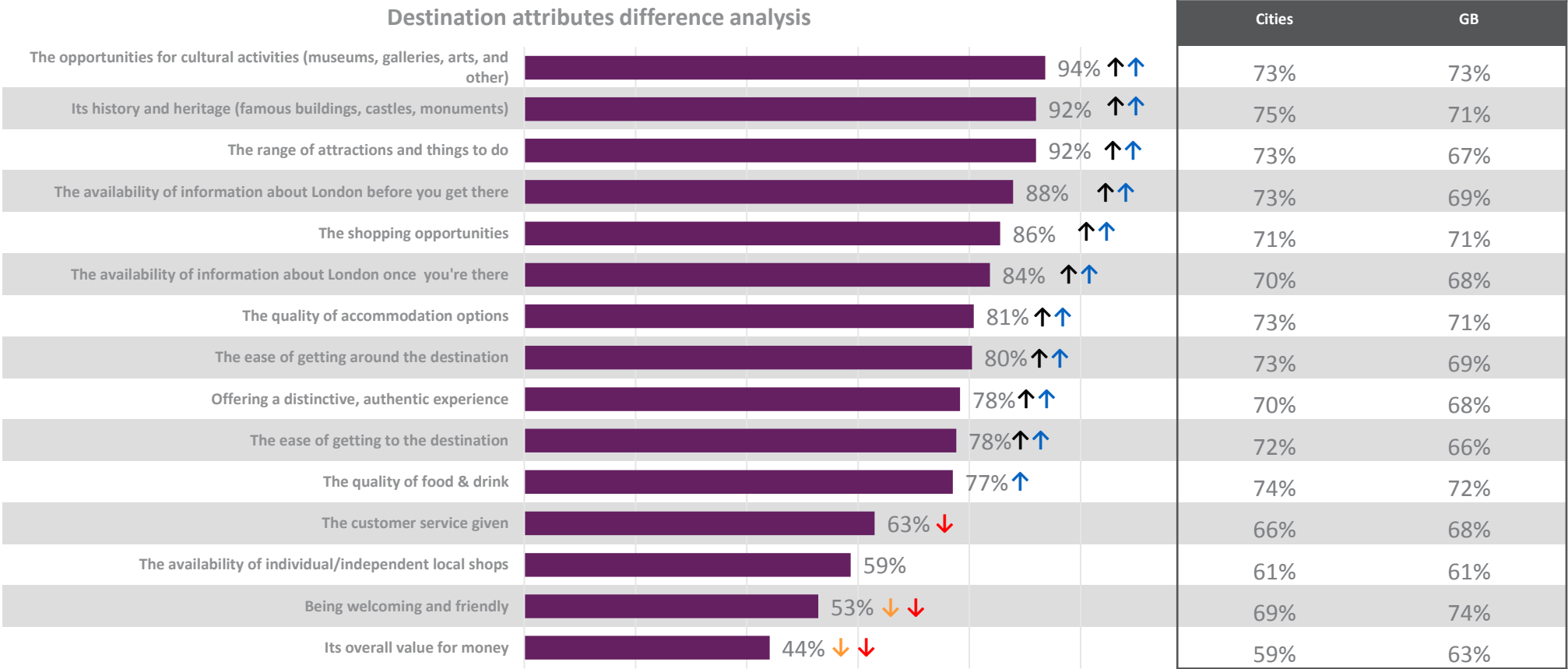
Base: In table Asked of all London shown on rotation from reduced destination list / Most recently visited destination

Question name: In tables

* Averages taken manually from averaging each destination, not via nett.

Destination attribute satisfaction – among visitors to London

Destination attributes difference analysis



LONDON IS RATED HIGHLY FOR ITS WEALTH OF VARIED ACTIVITIES ATTRACTIONS. HOWEVER, LONDONERS STILL SUFFER FROM PERCEPTIONS OF BEING LESS FRIENDLY THAN THE LOCALS IN OTHER AREAS OF GB. MOREOVER, THE PREMIUM PRICE COMMANDED IN THE CAPITAL MAKES TRIPS TO LONDON TOO EXPENSIVE TO BE CONSIDERED GOOD VALUE FOR MONEY COMPARED TO OTHER CITIES.

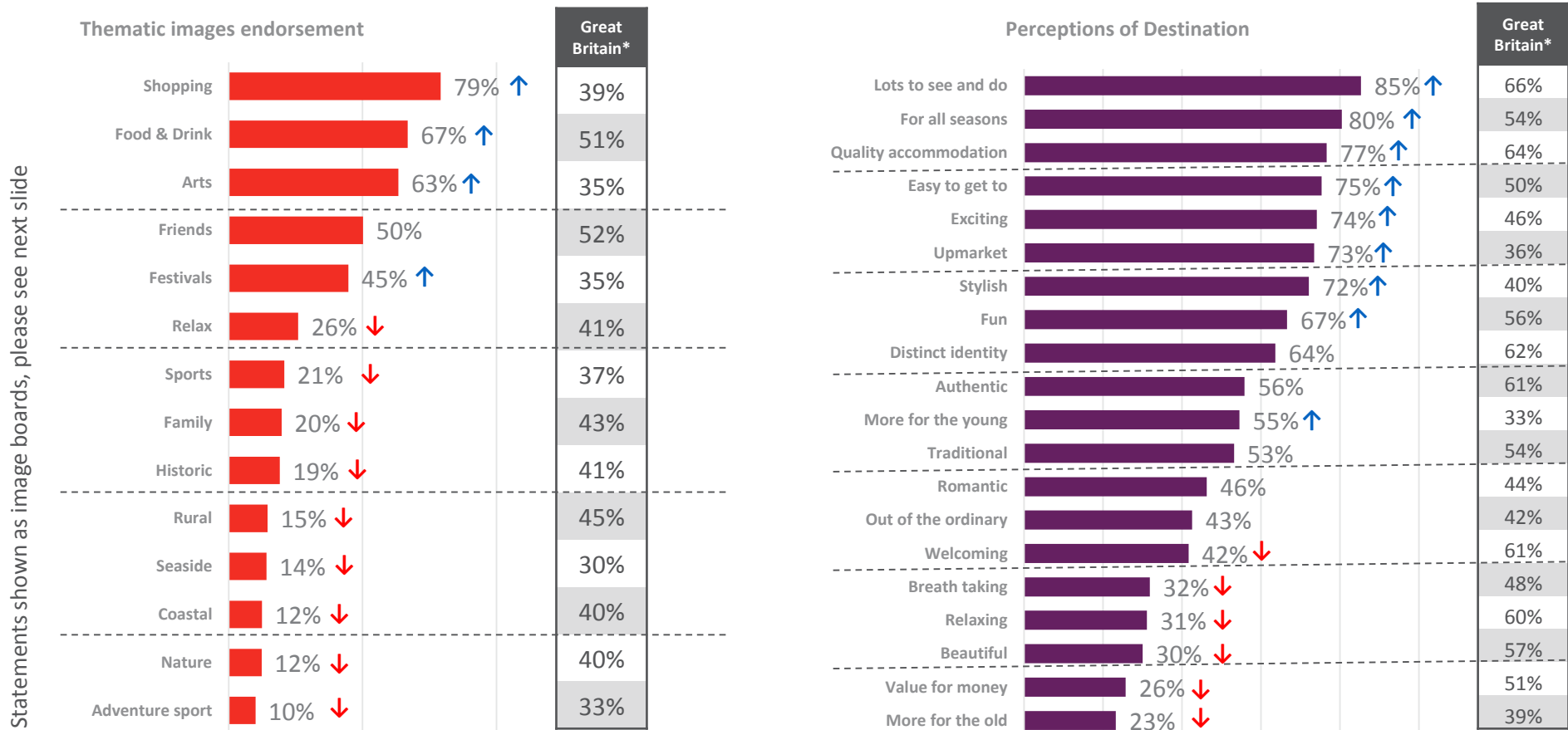
Base: London n=871, Cities =4117 total n=12179
Question name: C90 Destination attributes

Significant differences will be indicated by a black ↑/orange ↓ arrow against city destinations and a blue ↑/red ↓ against GB



Destination attribute perception - among GB holiday makers

These questions ask how destinations are perceived generally, not how each was rated on a recent trip. The question is asked of visitors and non-visitors.



WITH HUNDREDS OF STORES ACROSS THE CAPITAL, SHOPPING IS LONDON'S STAND OUT PERCEPTION, WHEN COMPARED TO GREAT BRITAIN BROADLY. LONDON IS RECOGNISED FOR ITS WEALTH OF DIVERSE ACTIVITIES AVAILABLE ALL YEAR ROUND. GB HOLIDAY MAKERS GENERALLY THINK THAT COMPARED TO GB, LONDON IS A DESTINATION MORE FOR THE YOUNG – DESPITE HAVING LESS VISITORS FROM THE YOUNGEST DEMOGRAPHIC WHEN COMPARED TO OTHER CITIES.

Base: London n=362, Total n=12179
Question name: C90 Destination attributes

Significant differences will be indicated by a black ↑/orange ↓ arrow against city destinations and a blue ↑/red ↓ against GB

* Averages taken manually from summing each destination, not via nett.

The theme boards

Image boards (E30/35)

Shopping



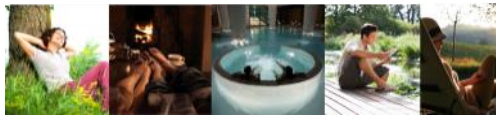
Seaside



Rural



Relax



Nature



Historic



Adventure



Friends



Food & drink



Festivals



Family



Coastal



Arts



Sports



Word associations (E40/45)

- Beautiful
- Breath-taking
- Distinct culture
- Traditional
- Authentic
- Relaxing
- Quality accommodation
- Fun
- Friendly
- Romantic
- Surprising
- Exciting
- Out of the ordinary
- Value for money
- For all seasons
- Stylish
- More for the old
- Easy to get to
- Upmarket
- More for the young

Summary: London

- London is a very popular destination among domestic travellers – 9 out of 10 people have visited before at some time with 8 out of 10 visiting in the last 3 years.
 - Half of those who visited did so in the last 6 months.
- Compared to the average destination in GB, London is seen as a destination “for the young”. Despite this, when compared with other city destinations, London attracts a demographic with less 18-24 year olds visitors.
- Trips to London almost always involve a stay in a hotel. Double the proportion of visitors staying in London choose to stay in hotels, when compared to other destinations in Britain.
- London’s popularity is evidenced by a high rate of loyalty, which is over 3 times other cities, and a high intention to revisit.
- London scores highly on satisfaction for “The range of attractions and things to do” and “The opportunities for cultural activities”.
- **A watch out:** London scores lower for “value for money” and “welcoming”.