

UNDERSTANDING THE
LONDON +
VISITOR

LONDON  **N**[®]
& PARTNERS



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EXECUTIVE SUMMARY

According to our research 15% of London visitors came to London as part of a wider trip to the UK (London+). In terms of the nations visited by these London+ visitors, 80% went to an English location outside of London, 30% to Scotland, 21% to Wales and 9% to Northern Ireland. A fairly high number of London respondents (27%) visited multiple locations outside London, with England and Scotland being the most popular combination.

Looking at holiday visitors to London from overseas, these are predominantly from long-haul destinations, and spend between 24% and 64% more nights in the UK (including London) compared to international holiday visitors to individual nations. London+ visitors are estimated to generate 1.6m international visits a year and to spend just over £641m a year in the UK nations' economies.

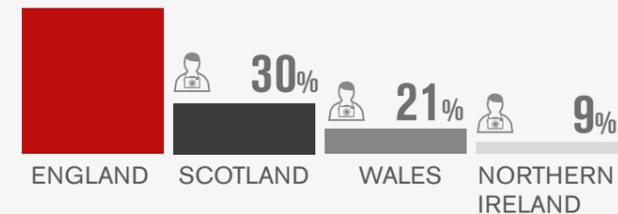
LONDON attracts **16.8M** Overseas Visits

51% of the UK's international visits (2013)

LONDON has **X12** more visits than the next city in the UK



80% of LONDON+ visitors went to an English location outside of London

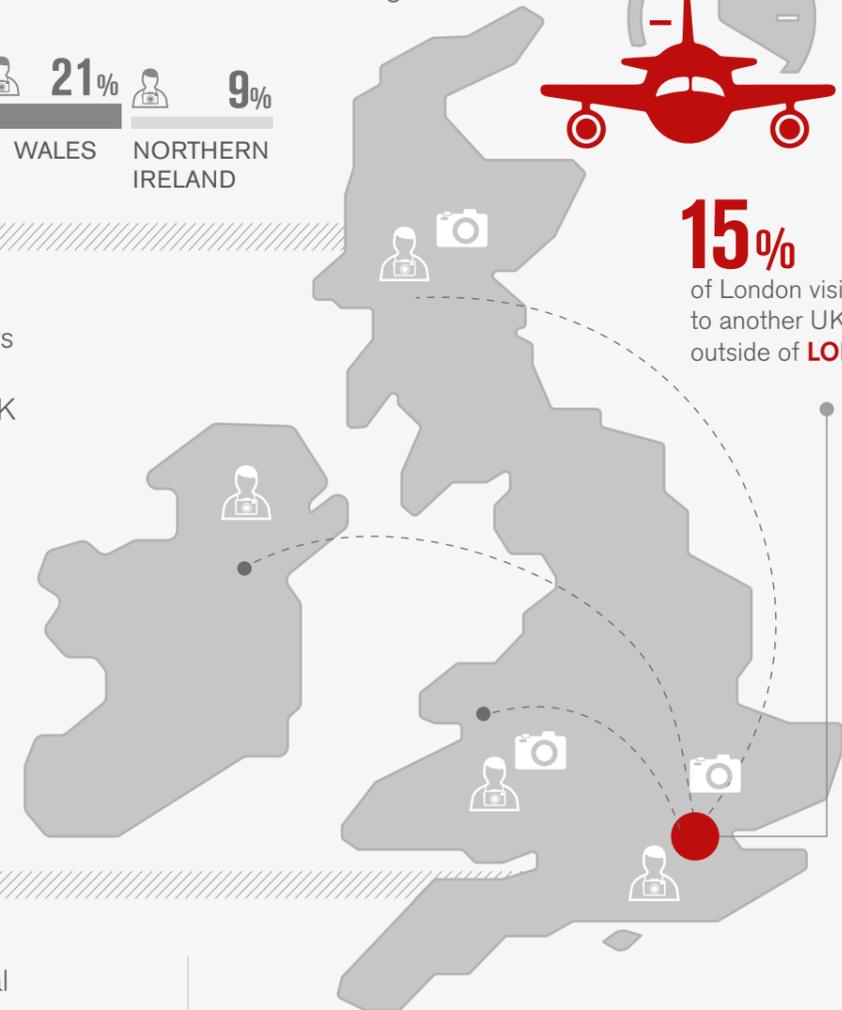
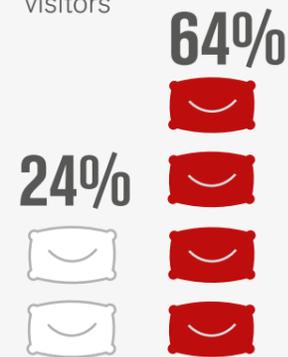


LONDON+ visitors are much more likely to be long-haul travellers



15% of London visitors go to another UK nation outside of LONDON

On average LONDON+ international holiday visitors spend between 24% and 64% more nights in the UK compared to single nation visitors



The estimated economic contribution of international LONDON+ is



Of the international visits to each nation LONDON+ represents



SECTION 1

ABOUT THIS RESEARCH

Research focus: understanding the London+ visitor, defined as someone who visits London as part of a wider trip to the UK; and quantifying the potential size of the London+ market and its economic contribution to the UK.

Research aims

- Track where London visitors travel within the UK
- Capture London+ visitors' countries of origin and destinations
- Compare London+ visitor behaviour with non-London+ behaviour
- Estimate potential size and economic contribution of London+ visitors



ABOUT THIS RESEARCH

This London & Partners research aimed to get under the skin of the London+ visitor, and estimate their contribution to the economies of nations across the UK.

London has long been recognised as a magnet that draws people into the UK. Once here, many visitors seize the opportunity to explore other destinations across England, and also to visit Scotland, Wales and Northern Ireland. Similarly, there is much evidence to suggest that a significant number of visitors head directly to locations around the UK and then stop off in the capital on their return home.

Visit Britain touched upon this so-called 'London+' effect in its piece of 2013 qualitative research, Foresight Number 117.¹ The national tourism agency ran focus groups to find out why overseas visitors came to London in such numbers, and explored barriers to travel further. However, this research did not attempt to quantify the number of people who might be classed as London+ visitors, nor did it calculate their likely contribution to tourist economies across the UK.

This research paper seeks to explore these very topics and extend the scope of previous analyses by looking at both overseas and domestic visitors.

We surveyed thousands of people from more than 80 countries in our bid to find out more about the London+ visitor.

For the first time, we have quantified who visits London as part of a broader UK trip, where beyond London they visit, how long they stay, and how much they spend while they are here. Our research has identified numerous opportunities and, of course, posed further questions. How can we encourage the London+ visitor to spend more time in London and beyond? How can regional tourism bodies tap into this phenomenon, and inspire the visitor to extend their stay? What sort of collaborative 'in-market' promotional activity is most likely to succeed?

We are now planning follow-up tranches of research in order to answer some of these questions.

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This analysis is the first attempt to develop a fact-based examination of the London+ effect, with a particular focus on overseas visitors.

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¹ www.visitbritain.org/Images/Foresight%20-%20issue%20117_tcm29-38190.pdf



SECTION 2

INTRODUCING THE LONDON+ VISITOR

LONDON+

IS SOMEONE WHO VISITS LONDON AS PART OF A WIDER TRIP TO THE UK.

£641 MILLION

spending in the UK nations' economies

1.6 MILLION

London+ visits are estimated to be made to the UK every year

THE LONDON+ VISITOR:

...makes up 15% of London's Visitors

...is usually a long-haul traveller

...tends to visit just one nation beyond London

...is drawn by history and heritage

This piece of research was undertaken by London & Partners' Strategy and Insight team.

London & Partners is London's official promotional organisation. Our job is to promote London and attract visitors, businesses, students, events and congresses to this remarkable world city. As part of our work, we try to understand why individuals choose to visit and stay here, and also attempt to quantify the economic contribution they make.

This report is the first in-depth analysis of an important breed of visitor: 'London+', who we define as someone who visits London as part of a broader UK trip, taking in at least one other location in England, Scotland, Wales or Northern Ireland. We wanted to understand the size and value of the London+ market. We also wanted to gain some insight into how this market could grow for the benefit of the entire nation. The findings in this report provide a framework for discussion and, most importantly, a starting point for action.

SECTION 3

LONDON IN THE UK CONTEXT

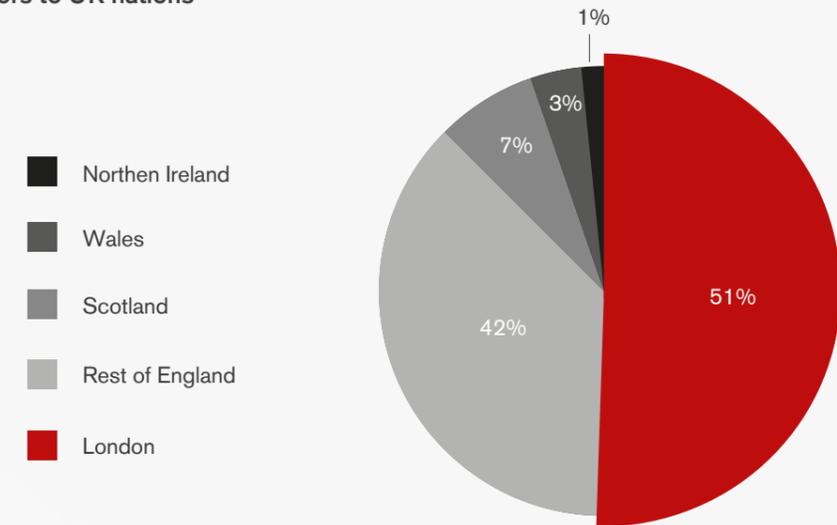
- London attracts 16.8M overseas visits
- 51% of the UK's international visits (2013)
- London has 12 times more visits than the next city in the UK

London's pulling power and strong brand means the Capital has a vital role to play as a gateway to the rest of the UK. 77% of international visitors to the UK come by air, with London Heathrow and London Gatwick operating as the major hubs of overseas arrivals. 71% of first time holiday visitors to the UK will come to London.

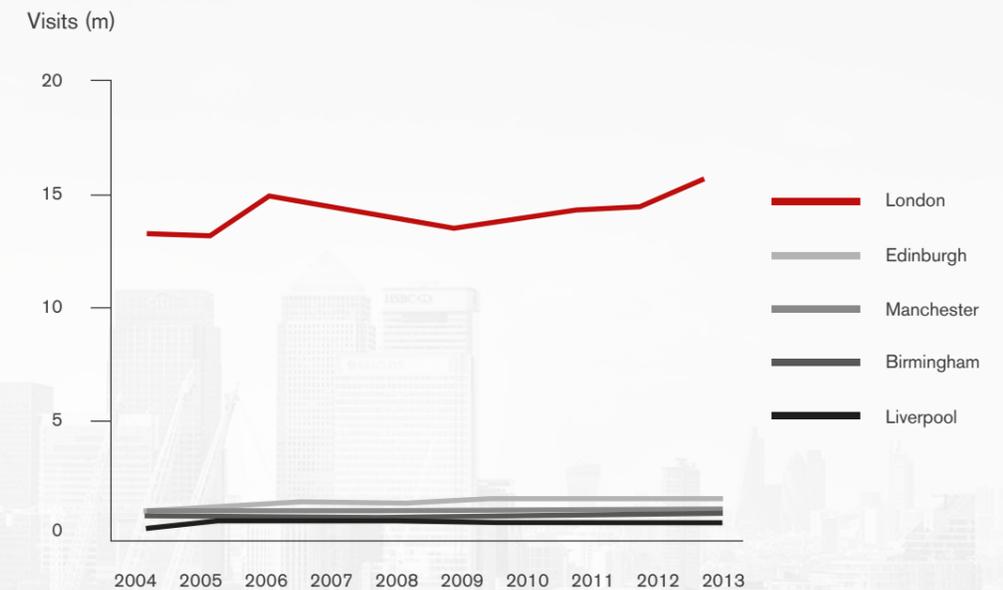
International visits to UK destinations in 2013 totalled 32.8m, up by 5.8% on 2012. London attracts 16.8 million international visits - 51% of all the UK's overseas tourists. England (excluding London) accounts for 42% of visits, followed by Scotland (7%), Wales (3%) and NI (1%). London receives 12 times as many visits as Edinburgh, the second most visited city, making it by far the most popular city.²

² International Passenger Survey, ONS

Proportion of International visitors to UK nations



Top 5 UK cities - Overseas staying visits, 2004 - 2013



SECTION 4

METHODOLOGY

Sample: more than 13,000 people interviewed across 80 countries world-wide.

Approach

- Online survey administered to VisitLondon.com registered users in autumn 2014
- Questions translated into multiple languages
- Respondents living in London excluded
- Respondents had to have made at least one trip to London in the 12 months prior to survey launch
- Final sample: 6,218 respondents
- Bespoke London data from 2013 International Passenger Survey used to estimate size and value of international London+

COUNTRY	LONDON VISITORS	OF WHICH, TOOK A WIDER TRIP TO THE UK (LONDON+)
Australia	194	77
USA	910	299
Rest of the world	1,172	279
Italy	402	80
Germany	282	47
France	355	30
Spain	219	18
UK	2,684	97
Total answers	6,218	927

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This is a quantitative analysis designed to prove or disprove the London+ theory

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³ <http://www.visitbritain.org/insightsandstatistics/inboundvisitorstatistics>

⁴ http://www.visitengland.org/insight-statistics/major-tourism-surveys/overnightvisitors/GBTS_2013/GBTS2013.aspx





METHODOLOGY

This report and analysis is based on a London & Partners consumer survey with VisitLondon.com users.

The survey was sent in September 2014 to all users who had registered on the VisitLondon.com website between July 2013 and August 2014. The main objective of the survey was to understand the profile of the website users and evaluate the site's effectiveness in encouraging additional tourists to visit London.

However, the survey also included a set of questions aimed at exploring actual visitors' experience and travel behaviour. The ten-minute survey was translated from English into French, German, Italian and Spanish and was completed by 13,829 respondents from more than 80 countries. A prize was offered to incentivise respondents.

Only respondents who lived outside London and had made at least one trip to London in the 12 months prior to the survey launch were considered for London+ analysis. This amounted to 6,218 people, representing 45% of all respondents. More than half of the responses were received from the US and UK, followed by 'rest of the world'⁵, France and Italy.

Quantifying London+ size and economic impact

To quantify the economic impact of London+ international visitors, London & Partners used bespoke data on London visitors from the International Passenger Survey (IPS 2013). This data included information on the proportion of London visitors who stayed in more than one region within the UK.

⁵ Countries outside Australia, US, Italy, Germany, France, Spain and the UK.

SECTION 5

QUANTIFYING LONDON+

Key finding: 15% of London visitors venture outside the capital to take in another UK location.

- 73% of London visitors stay only in the capital
- 1.6m estimated international visits to London and at least another UK location a year
- London + international visitors comprise 10% of nation's international visitors

This part of our research sought to quantify what percentage of all visits to the UK were 'London+' excursions – namely visits that took in a UK location outside London. We also wanted to know what proportion of London visitors ventured outside the capital to explore other UK nations.

Where do UK visitors spend their time?

The majority of visitors to London choose to stay in the capital, with nearly three quarters of visitors to London preferring to devote their trip to the city alone. That said, 27% of London visitors have broader horizons. Just over one in ten visits combine a trip to London with taking in a destination outside the UK to Europe.

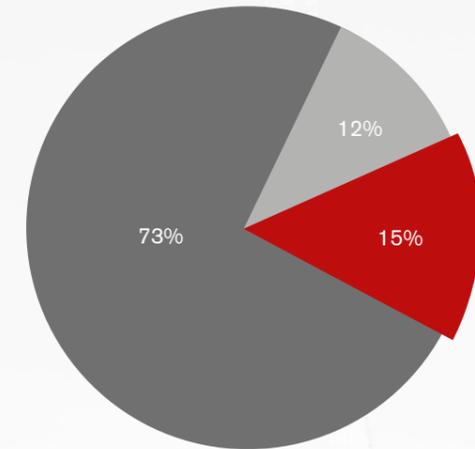
The key figure is the number of people who combine a trip to London with another UK location – the definition of the London+ visitor. Around one in every six London visitors (15%) call in to at least one other UK destination as part of their trip.

We also estimated that 1.6m London+ trips were made by international visitors. This corresponds to 10% of all the international visits to the UK (excluding London).

So over 12 months, visitors go on one and a half million trips that combine London with a visit to another UK location. London & Partners is now exploring ways to work with other tourism bodies across the UK to encourage these people to extend their stay with excursions to other destinations in England and to Wales, Scotland and Northern Ireland.

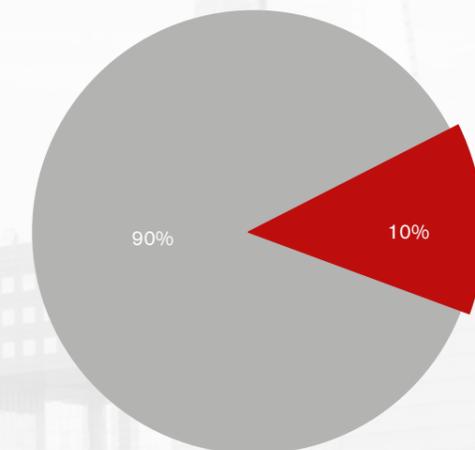
Where else do visitors to London go?

- Europe
- The UK
- London only



London+ visits as a proportion of international visits to nations outside of London

- UK international visits (ex-London)
- UK international London+ visits



SECTION 6

COUNTRIES OF ORIGIN

Key finding: long-haul travellers are most likely to be London+ visitors, hailing from Australia, the US and elsewhere outside Europe.

- **Australians and Americans most likely to head beyond London**
- **Brits least likely to be London+ visitors**
- **Scope to extend stays of Europeans**

We wanted to know whether certain nationalities were more predisposed to exploring the UK with London than others. We sought to discover whether London+ visitors were more likely to be travelling from close to home, or from further afield. And we were also intrigued to find out whether nations would switch 'rankings' when comparing London+ with 'London only' visitors.

Which nations dominate?

The tables on the next page display the relative proportions of visitors by nation in our sample, comparing London+ visitors with 'non-London+' visitors. Long-haul travellers dominate the London+ league. Those who travel from further afield understandably want to exploit their trip to the full, stopping off at locations they might never have the chance to see again.

Americans are the dominant group, topping the league at nearly a third of the total. Putting the 'rest of the world' category to one side, the next largest group is from the UK, followed by Italy, Australia, Germany and France. Spain has the smallest national representation at just 2%. By

contrast, UK visitors top the 'London only' visitor league⁶. Again discounting the 'rest of the world',⁷ the next largest group is the US, followed by Italy, France, Germany, Spain and Australia.

Comparing the two league tables, the non-London+ visitor is therefore more likely to be a domestic traveller, while London+ visitors are most likely to be long-haul travellers. The other notable differences are the significant positional and proportional shifts by Australian and American visitors. Both nations dominate the London+ market, but are far less likely to be 'London only' visitors.

“
Only 8% of French and Spanish visitors to London leave the Capital to explore another location across the UK.
 ”

PROPORTION OF LONDON+ VISITORS BY NATIONALITY	
1.	US 32%
2.	Rest of the world 30%
3.	UK 10%
4.	Italy 9%
5.	Australia 8%
6.	Germany 5%
7.	France 3%
8.	Spain 2%

PROPORTION OF NON-LONDON+ VISITORS BY NATIONALITY	
1.	UK 49%
2.	Rest of the world 17%
3.	US 12%
4.	Italy 6%
5.	France 6%
6.	Germany 4%
7.	Spain 4%
8.	Australia 2%

Nationalities more likely to be London+ visitors

We wanted to find out which nationalities were most predisposed towards being London+ visitors, and which were content to stay within London for the duration of their stay. Australians are the most likely nationality to explore another UK location as part of their trip, followed by Americans as the second most adventurous group. UK visitors are the least likely to combine a trip to London with another UK location. What is striking though is the high proportion of European visitors who choose not to venture beyond London's limits. Only one in five Italians – and fewer than one in ten French and Spanish visitors – leave London to explore the rest of the UK.

Does it make a difference where you're from? Proportions of visitors type by market

COUNTRY	LONDON+	NON-LONDON+
Australia	40%	60%
US	32%	68%
Rest of the world	30%	70%
Italy	20%	80%
Germany	17%	83%
France	8%	92%
Spain	8%	92%
UK	4%	96%

⁶ Defined as London visitors who don't take in another UK location as part of their trip, i.e. only visit London or visit London as part of a wider trip to Europe.

⁷ Comprises countries outside the US, UK, Australia, Italy, Germany, France and Spain.

SECTION 7

DESTINATIONS

Key finding: England is the most popular draw for London+ visitors, with Scotland, Wales and Northern Ireland following in order of popularity.

- Majority of London+ visitors visit one location outside London
- England and Scotland is the most popular multi-nation combination
- London+ international holiday visitors spend more nights than single nation visitors

We sought to find out where London+ visitors spent their time outside the UK Capital. Do they spread their stay equally across UK countries, or are some areas and nations more popular than others? We also wanted to investigate how long they typically stay in each location, and whether there was any difference in the duration of stay between London+ visitors and those heading to single nations.

The majority head for one stop in England

The overwhelming majority of London+ visitors choose to head for just one location outside of the Capital, and for four out of five people, that location is in England. The popularity of England is clear, and unsurprising considering London's excellent transport links and plethora of prime attractions. That said, Scotland exerts a strong pull, with nearly one in three London+ visitors choosing to take in a destination in this country of cultural cities, mountains and spectacular coastlines.

Wales drew just over one in five London+ visitors, while Northern Ireland – the Irish Sea necessitating a flight or ferry trip – is the destination of choice for nearly one in ten trippers. When looking at multi-stop trips, those linking several locations together across the UK are a rare breed.

Only 3% of London+ visitors make a beeline for all four nations but around one in six (17%) are keen on visiting two locations beyond London.

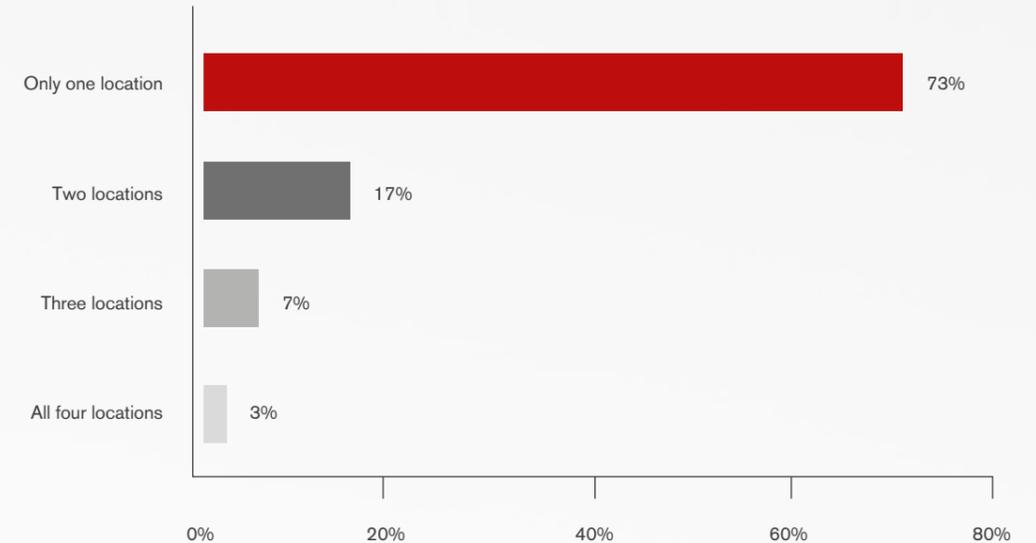
Where next? The most popular multi-nation visits

Which combinations of countries are the most favoured by London+ visitors? This is the running order of popularity:

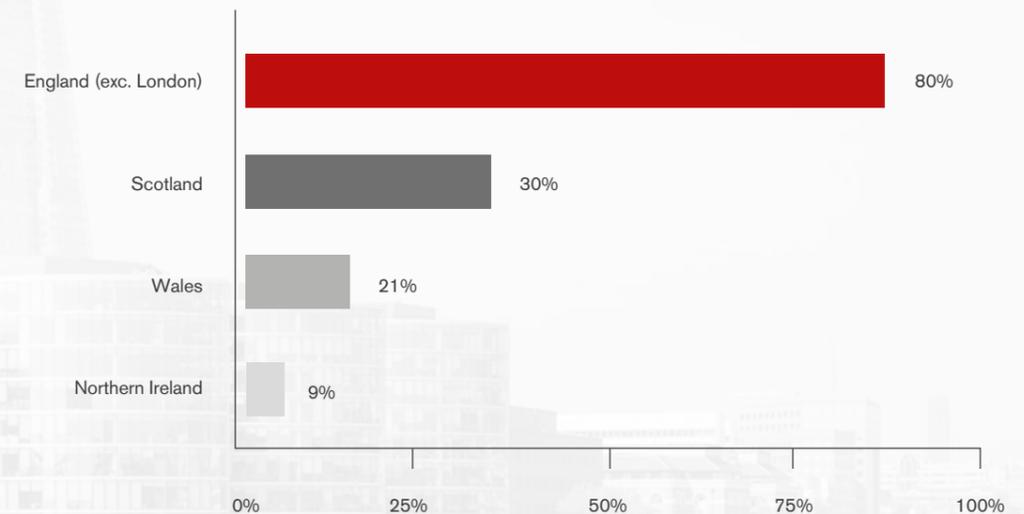
1. England and Scotland
2. England and Wales
3. Scotland and Wales
4. England, Scotland and Wales
5. England and Northern Ireland

“
73% of London+ visitors visited only one nation outside London.
”

Number of UK nations visited in tandem with London



Where else did you stay within the UK? ⁸



⁸ Percentages do not add up to 100% as some trips took in multiple nations.

DESTINATIONS

London+ international holiday visitors stay longer

The data shows that those who combine a trip to London with another UK location are investing time and effort in all destinations visited. What benefits London is clearly also of benefit to locations right across the UK.

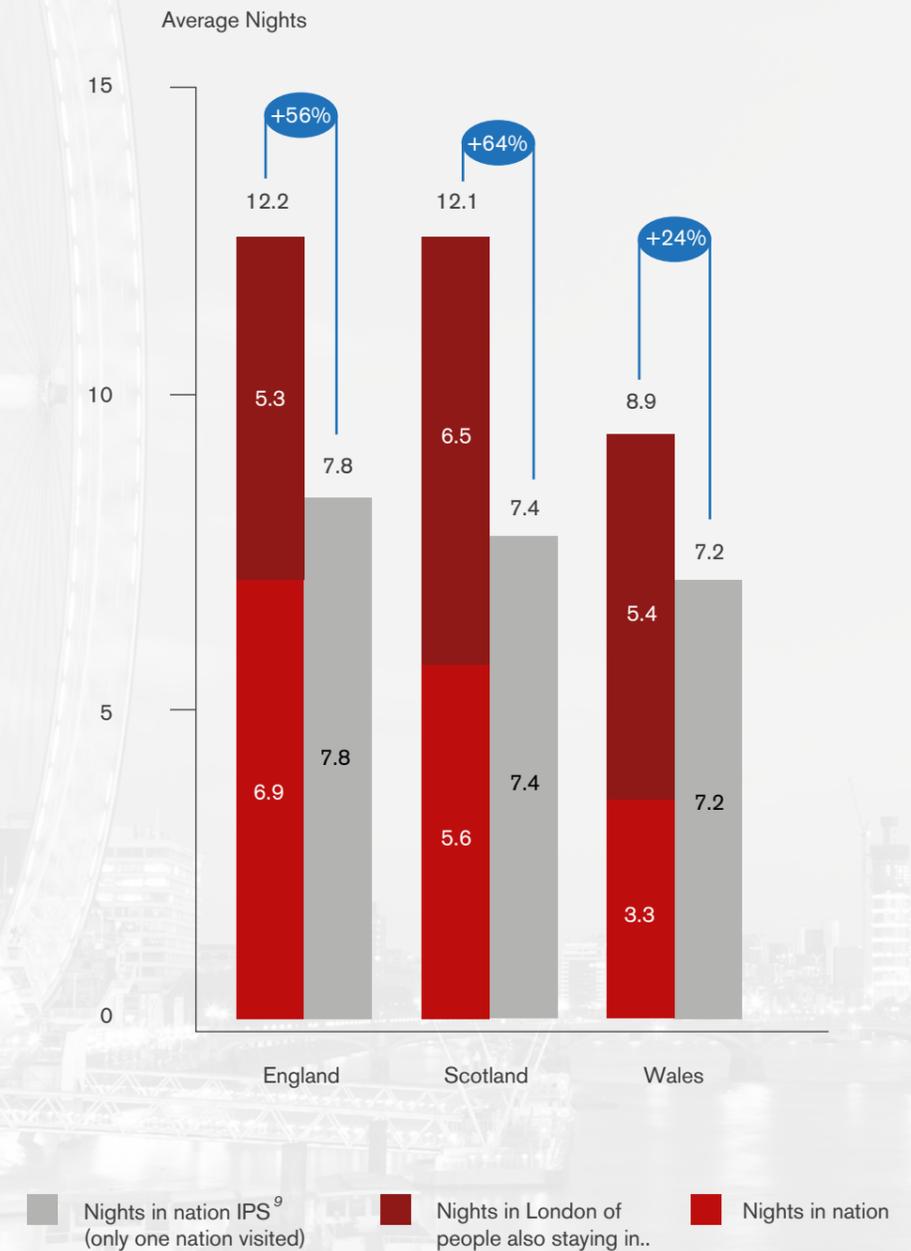
When comparing the total number of nights stayed by London+ international holiday visitors with nights stayed by visitors to countries across the UK, we see the average London+ trip lasts considerably longer. In England, London+ visitors stay for 4.4 nights longer than individual nation visitors, averaging 12.2 nights over their total trip.

In Scotland, the difference between the two groups is even more marked: London+ visitors stay on average for 12.1 nights, 4.7 nights longer than visitors to Scotland alone. Wales also shows a sizeable uplift, with London+ visitors spending 1.7 nights more than visitors who just visit the nation alone.

London+ visitors are also even-handed when planning their trips, spending roughly half their time in the capital and half of it in the region. And in the case of English locations, the number of nights spent outside London is greater than the number of nights spent in the Capital.

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London+ international holiday visitors spend between 24-64% more nights in the UK compared to single nation visitors.
 ”

International holiday: Nights spent by London+ visitors compared to nations' visitors



⁹NI data were not available

IPS: International Passenger Survey is an official annual Government survey that measures the number of international visitors to the UK.

SECTION 8

MOTIVATION & BEHAVIOUR

Key findings: taking a holiday is the most popular reason for visiting London and the UK. London is the first stop for most visitors.

- London+ visitors are attracted to history and heritage
- Non-London+ visitors are more drawn by shopping
- 68% of London+ respondents visited London first

The better tourism agencies understand their target audiences, the more chance they have to engage and inspire them. We wanted to find out what motivated the London+ visitor to come to the UK in the first place. Do visitors head straight for the capital or to another UK location first? This section of the research answers these key questions.

A holiday is the main draw

Well over half of London+ visitors come to the UK on holiday, with nearly one in ten attracted by a specific cultural or sporting event. The next most common reason to make the journey is to visit friends or relatives, with just over one in five trips motivated by personal relationships. Education and commerce are neck and neck, with around one in sixteen people visiting for study or business. Exactly 2% of London+ visitors embark for a specific conference or event. More than two thirds of London+ visitors choose to make London their first stop, before they go on to other UK destinations.

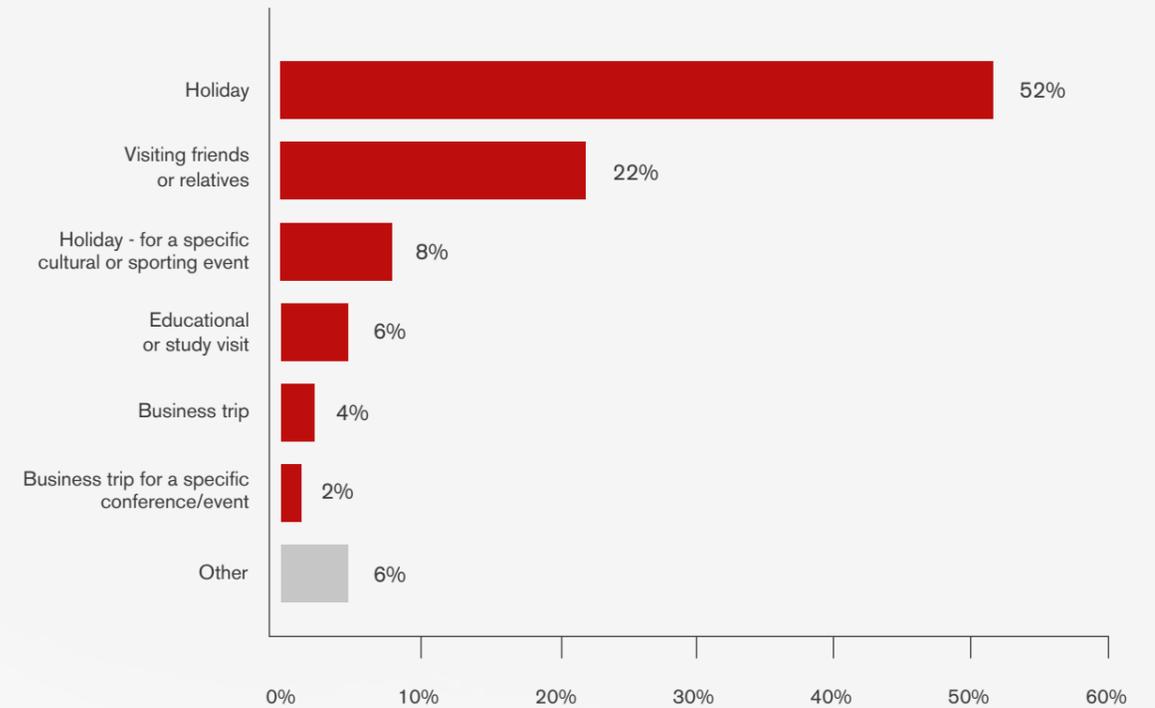
Heritage and shopping divide opinion

We wanted to find out whether there were any differences in interests when comparing London+ with non-London+ visitors.

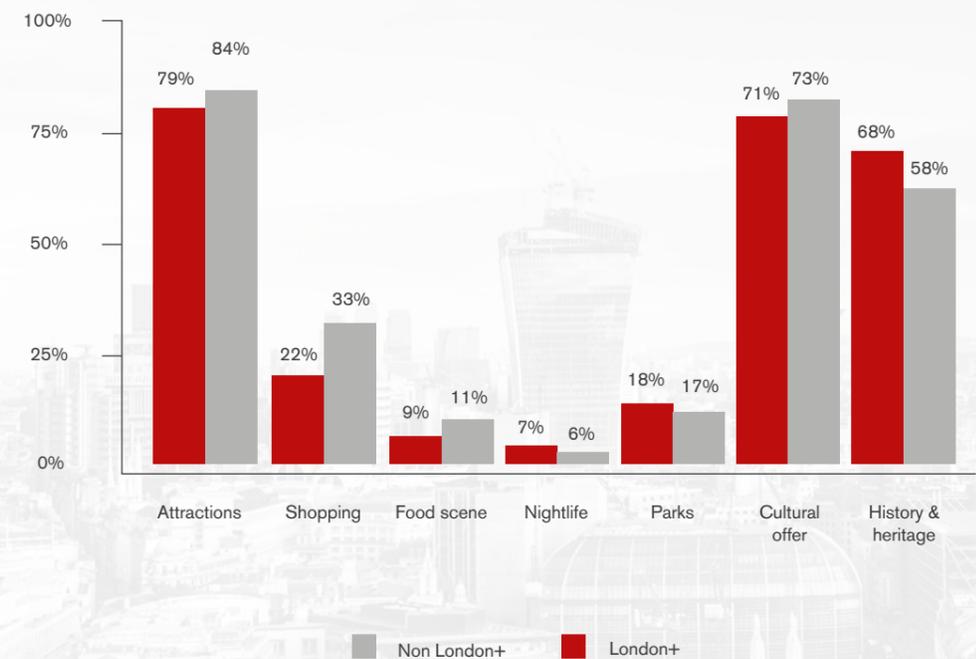
In the main, London+ visitors and non-London+ visitors are drawn to the UK for the same reasons. Both groups rate 'attractions' as the primary draw, closely followed by the UK's cultural offer. The allure of parks, culinary delights and nightlife is closely aligned for both camps. However, there are two areas where the groups express markedly different preferences: non-London+ visitors are more interested in shopping compared to London+ counterparts, who in turn are more attracted to history and heritage. Nightlife comes last on the list for both groups, attracting just one in 14 people to the UK. Compared to non-London+ visitors, the average London+ visitor is more likely to:

- organise trips 4-12 months in advance
- rent apartments or stay in B&Bs
- have visited London less frequently

Reasons for visiting for London+ visitors



Drivers: London+ compared to non-London+ visitors



SECTION 9

ECONOMIC IMPACT

Key finding: London+ international visitors are estimated to inject more than £641million into UK nations' economies each year.¹⁰

- England benefits most with a £529m contribution¹¹
- 6% of Scotland's tourism spend is from London+ visitors
- London+ visitors book 8% of all stays in Wales and Scotland

We have always known that visitors who combine trips to London with forays to other nations around the UK make a significant economic contribution to regional economies. We were keen to find out how much these visitors spend and where they spend it. We also sought to quantify the proportion of each nation's respective tourist economy they make up.

Far-reaching economic impact

London+ international visitors make significant contributions to the tourist economies of Scotland, Wales and England. England, as the most popular destination, takes the lion's share, benefiting from almost 1.3m visits by travellers also staying in London. The economic contribution

is impressive at more than £529m a year. Scotland is the second biggest benefactor, receiving 1.1m nights and an estimated economic injection of £96m a year, 6 per cent of the nation's tourist's spending.

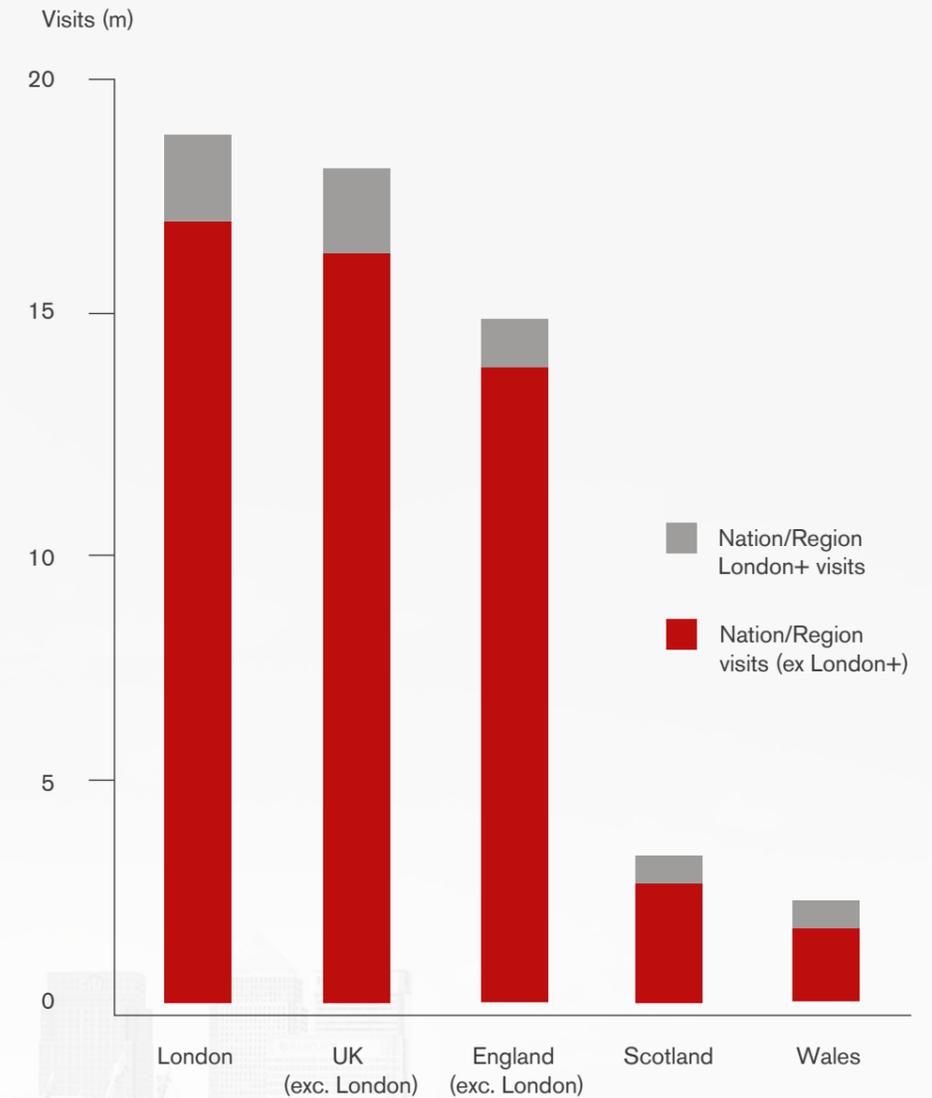
Although in third place, Wales' economic take-out is £16m spent over 264,000 nights stays a year. Samples were too small for Northern Ireland to draw any significant conclusions.

Country visited	regional int'l visits (m)	London+ visits per country (m)	London+ as % of Region's visits (all reasons)	Total nights (m)	Overall economic impact (£ m)	London+ as proportion of international tourism economies (IPS)
England	13.63	1.28	9%	8.86	£529	7%
Scotland	2.44	0.21	8%	1.11	£96	6%
Wales	0.88	0.07	8%	0.26	£16	5%

¹⁰ IPS (2013) nights and spending data used to estimate economic impact in terms of visitors expenditures outside London. Data for NI was not available.

¹¹ England in line with the previous sections does not include London.

London+ visits as a proportion of International visits to London and UK nations



London+ as a proportion of Nations visits	15%	10%	9%	8%	8%

SECTION 10

CONCLUSION

For the first time, we have quantified the contribution made to the UK economy by the London+ visitor.

We now know that:

- 15% of London visitors go to another UK location outside London
- Of these visitors, 80% go to an English location outside of London, 30% to Scotland, 21% to Wales and 9% to Northern Ireland
- London+ international visitors contribute just over £641m a year to the UK tourism economy
- London+ international holiday visitors spend between 24% and 64% more nights in the UK (including London) compared to international visitors to individual nations
- Long-haul travellers are significantly more likely to travel to another UK destination outside London compared to EU and GB visitors

This research has also generated some intriguing facts about the motivation and mindset of the London+ visitor. We now know that London+ visitors are primarily attracted to history and heritage and that the majority visit London first before going on to another destination. However, London & Partners is very much at the beginning of its investigations. We need to find out much more about the appeal of 'beyond London', and explore the barriers to booking extended trips.

Ultimately we need to ask: what if we managed to extend the ambitions and itineraries of UK visitors and substantially increase the size of this segment? The results could be significant, adding millions of pounds to both London and regional economies.

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We hope that this piece of research has shed light on a very much debated topic, and will eventually lead to a more concerted approach between national and regional tourism boards and London.

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Thank you

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