

LONDON'S CULTURAL TOURISTS



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OVERVIEW

Nine out of ten leisure tourists visited at least one attraction during their visit to London.

Influencing factors

Word of mouth and internet searches have most overall influence on attractions cultural tourists visit, although guide books shape more visits for overseas trip-takers.

Number of attractions visited

Nine out of ten cultural tourists visited at least one attraction while in London. Overseas and younger visitors went to the most attractions.

Popular attractions

West End shows hold particular appeal for domestic tourists and older visitors, while London's historic attractions are most sought after by overseas tourists.

Booking trends

Almost a third of visitors surveyed had not purchased any attraction tickets during their visit, although UK visitors are more likely to purchase tickets than those visiting London from overseas.



ABOUT THIS RESEARCH

Aims of the research

- Establishing what attracts the cultural tourist to London
- Understanding the cultural tourist's experience
- Identifying the types of attractions that appeal to different demographic groups

The cultural tourist's contribution to London's economy is significant. Since the financial crisis, tourism has been the third largest source of jobs and growth for the capital¹, with cultural tourism contributing an estimated £3.2 billion GVA to London in 2013 and supporting 80,000 jobs². London receives nearly three times more holiday visits than business trips, with a record 8.9 million overseas tourists taking a leisure trip to the city in 2014³.

It is London's attractions, culture, history and heritage that leisure visitors report as the main drivers motivating them to come to the city⁴. However, as the capital faces increasing competition from other destinations, a greater understanding of the cultural tourist is required if London is to continue to attract this sightseer.

With the value of the cultural tourist in mind, this report seeks to understand how such individuals experience London. It identifies what motivates and influences cultural tourists to select the capital as a holiday destination and examines how they choose which attractions to visit during their trip. Moreover, the research uncovers details about tourists' behaviour when planning their itinerary and booking tickets to enrich their cultural experience, as well as key demographic trends.

1. London Enterprise Panel, 2015. London 2036: An Agenda for Jobs and Growth.
2. Greater London Authority, 2015. The Value of Cultural Tourism to London.
3. Office for National Statistics, 2015. International Passenger Survey 2014.
4. London & Partners, 2014. VL.com survey.

Methodology and sample

The report is based on data collected by London & Partners through the London's Autumn Season Survey. In February 2015, the survey was sent to individuals who had viewed the London's Autumn Season video, part of an international campaign to promote the capital's exceptional cultural events and exhibitions taking place throughout autumn 2014.

The survey's main objective was to understand the campaign's impact on the tourism choices made by visitors to London during the second half of 2014. It included questions exploring their experience of the city's cultural offerings and attractions, which is the focus of this report.

We are classifying these individuals as "cultural tourists" due to their interaction with the campaign.

Comprising 30 questions, the survey was completed by 11,228 respondents from across the world. Feedback from those living in London (561) was excluded, while only respondents who had visited London during the previous five months were considered in this analysis (24%). The report is, therefore, based on a sample of 2,564 responses.

39% of leisure visitors identified London's cultural experience as the main driver for their visit to the capital





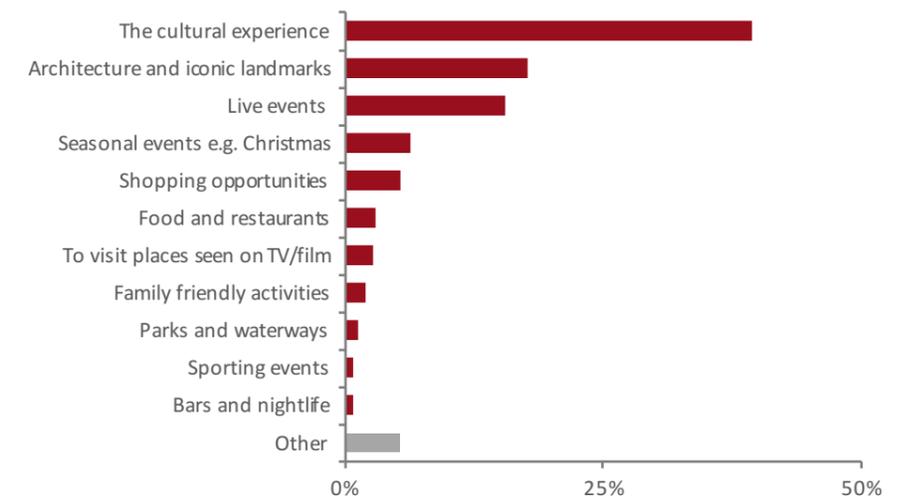
VISITS TO LONDON

Key drivers

- London's cultural experience was the main driver for leisure visits
- Culture attracted more than double the proportion of leisure visitors to the city than any other driver
- Regardless of age or nationality, culture remains by far the most popular reason for holiday visits to the city

The predominant reason for leisure visits to London is the city's cultural experience. Its considerable offering of museums, galleries, exhibitions and attractions represented a significant draw for 39% of leisure visitors surveyed. This is more than double that of the second most popular driver, London's architecture and iconic landmarks, which were attractive to almost a fifth of leisure visitors.

Key drivers for leisure visits to London



Trends by nationality

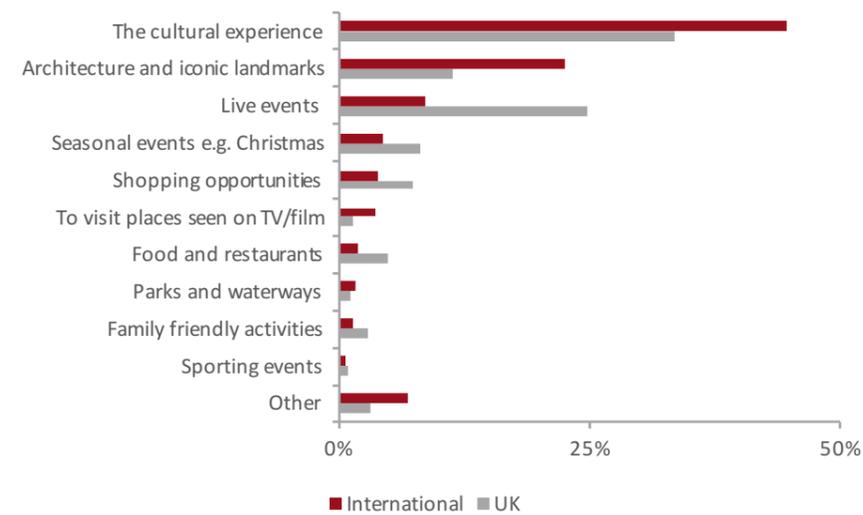
Both international and domestic visitors predominantly came to London for the cultural experience, highlighting the city's renowned status as a cultural metropolis. This was the case for 45% of overseas visitors to the capital and one third of those making the trip from elsewhere in the UK.

Further motivations for visiting London differ between UK and overseas visitors. International tourists are twice as likely to visit the city for its architecture and iconic landmarks - almost a quarter (23%) favoured these, compared to 11% of UK visitors.

On the other hand, live events were three times more popular amongst domestic visitors than overseas tourists, with a quarter of UK tourists reporting these as a key motivator for visiting London.

Domestic visitors were also around twice as likely to be driven by seasonal events (8% of domestic respondents, compared with 4% of international visitors), the city's food offerings (5% domestic, 2% international), as well as the shopping opportunities (7% domestic, 4% international).

Key drivers for leisure visits to London: international vs. domestic visitors

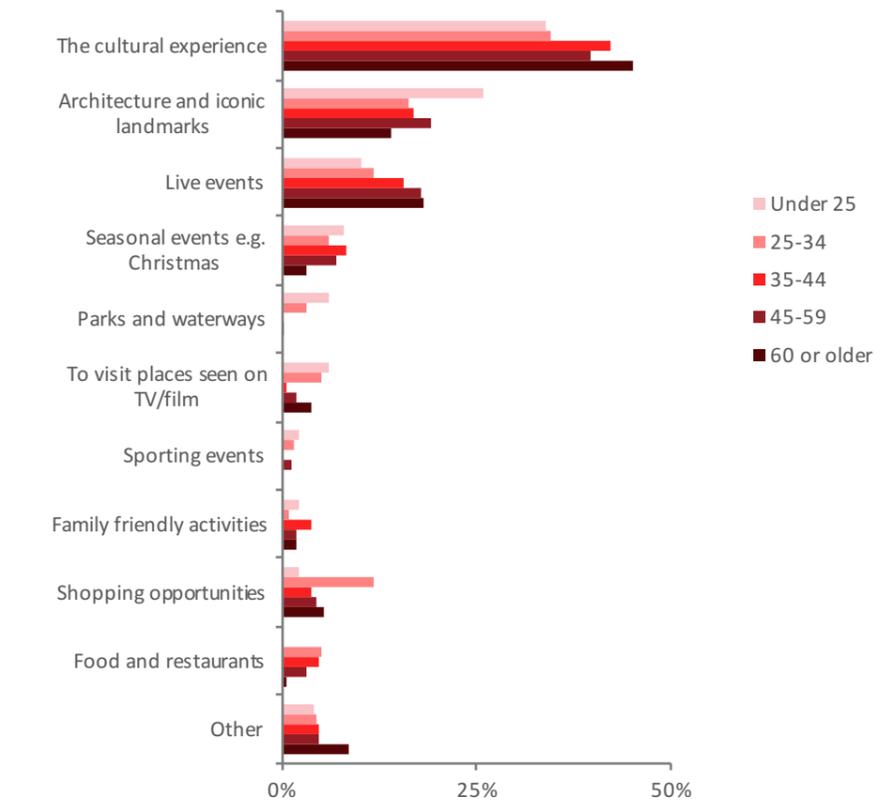


Trends by age

London's cultural experience has broad appeal across all age groups, with young and old rating this their number one driver for visiting. This was the main motivation for at least a third of leisure tourists in each age category—plus more than 40% of 35-44 year olds and 45% of those aged over 60.

There is also strong demand for the city's architecture and iconic landmarks across most age groups. This was the second most popular driver for tourists of all ages except the over 60s. Younger visitors in particular noted the appeal of London's landmarks, with more than a quarter of under 25s citing this as a reason for visiting.

Key drivers for leisure visits to London: by age





FACTORS OF INFLUENCE

Influencing factors

- Word of mouth and online resources have greatest overall influence on where London's cultural tourists visit
- Word of mouth has the greatest impact on domestic visitors' decisions
- International visitors are more likely to be influenced by guide books

Word of mouth has most overall influence on attractions visited. This influenced such decisions for more than a third of those surveyed. This was followed by information sought online, a key factor shaping visits for 30% of London's cultural tourists⁵.

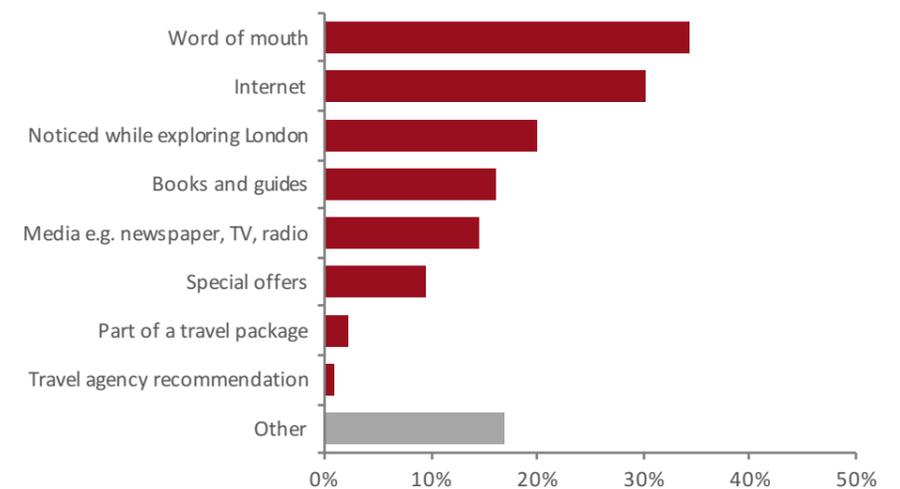
The capital's shopping opportunities were most popular with 25-34 year olds. Double the proportion of such visitors indicated the significance of shopping in their decision to visit London, compared to the second highest group for whom this held appeal—the over 60s.

Most interest was shown in seasonal events such as Christmas by the under 25s and 35-44 year olds, while younger visitors (both under 25s and 25-34 year olds) were keen to visit places they had seen on TV or in films.

The popularity of live events, such as theatres and concerts, increases with the age of the visitor, with the over 60s expressing most interest in such offerings (18%).

London's cultural experience has broad appeal across all age groups, with young and old leisure visitors rating this their number one driver for visiting the capital

Main factors influencing the leisure tourist's decision to visit London



⁵ Percentages add up to more than 100%, as respondents were able to select more than one option.

A fifth of leisure visitors opted for a more spontaneous approach, visiting a cultural offering after coming across it once in the capital. For a smaller proportion, more traditional methods influenced their itinerary, with 16% using books and guides as a driver and 15% having been inspired by the media. Packages and recommendations from travel agents, however, appear to have minimal influence in shaping cultural tourists' trips to London.

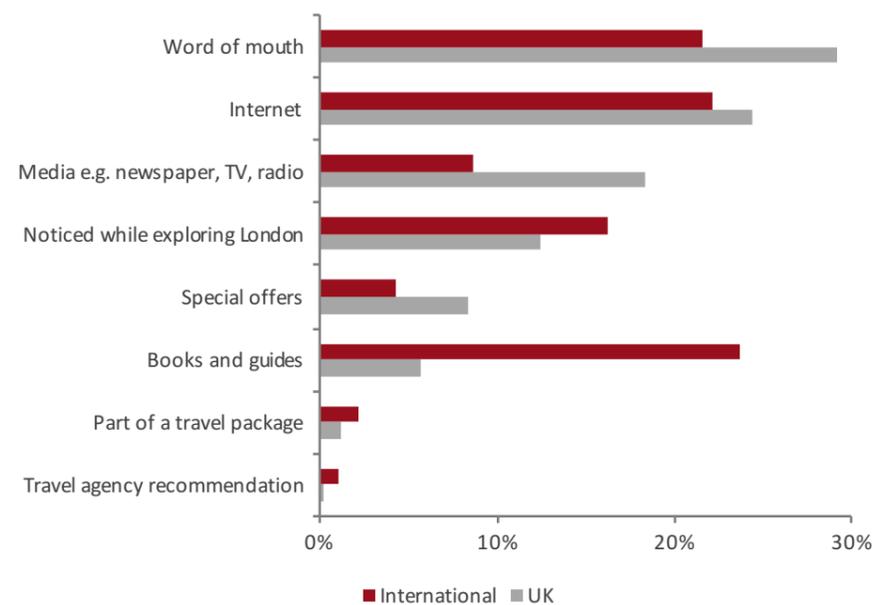
Trends by nationality

Trends in the leading factors influencing domestic tourists' visits to London are similar to those seen overall. Word of mouth and online sources are influential drivers.

Books and guides were the main source of information for the highest proportion of overseas trip-takers. Such resources influenced 24% of visits from overseas—four times the proportion of UK visitors who used these to inform their trip. As with domestic leisure tourists, word of mouth (22%) and the internet (22%) were also key influencers for international visitors.

Domestic tourists were twice as susceptible to be influenced by the media (18%) as overseas visitors (9%). This is likely to be an outcome of the British media's interest in domestic tourism, generating more exposure to such information for those based in the UK.

Main factors influencing the leisure tourist's visit to London: international vs. domestic visitors



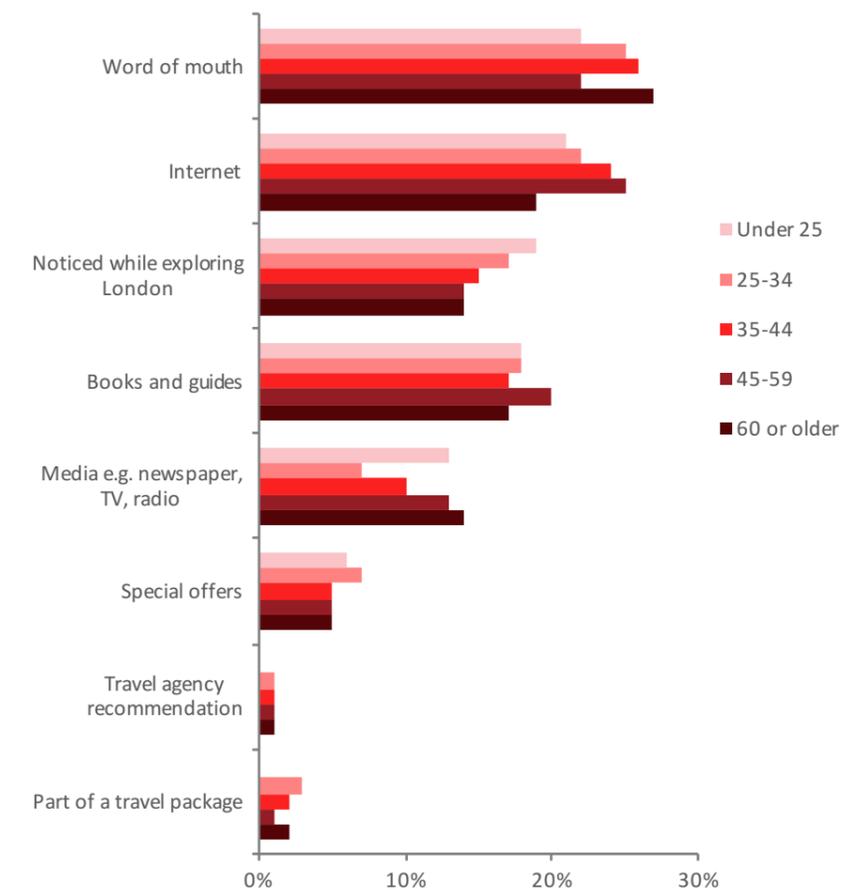
Trends by age

Word of mouth was the most influential factor driving attractions visited across all age groups. At least a quarter of respondents from each age category indicated that this had motivated them to visit a particular attraction during their trip.

Similar trends in the internet's influence were seen across each age category, with between 22% and 25% of visitors from each age group indicating the impact of online resources on where they had chosen to visit.

Special offers were most attractive to 25-34 and 45-59 year olds, with 9% of each group acknowledging them as a driver. The media's influence increased with the visitor's age, and was noted by 12% of 45-59 year olds and 14% of over 60s.

Main factors influencing the leisure tourist's visit to London: by age



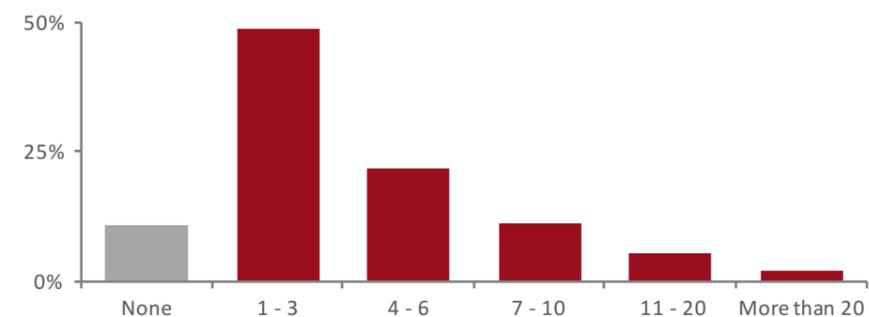
CULTURAL ITINERARIES

Number of attractions visited

- Almost 90% of leisure tourists will visit at least one attraction when in London
- International visitors go to more attractions than domestic tourists
- Under 25s venture to a greater number of attractions than older visitors

A typical holiday trip to London will involve a visit to at least one attraction. This was the case for almost nine out of ten leisure tourists surveyed. Nearly half went to between one and three attractions during their trip to the capital, while just over a fifth experienced four to six.

Number of attractions visited during leisure trip to London





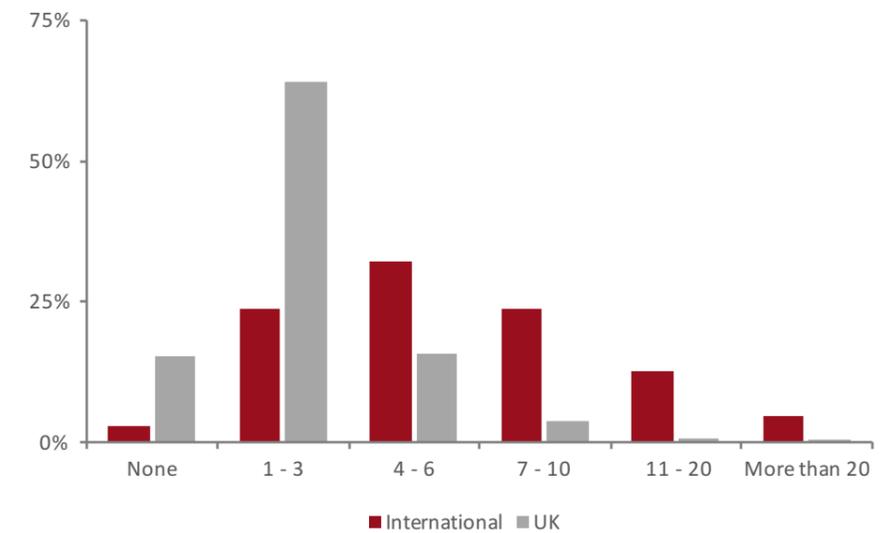
Trends by nationality

Those travelling to London from overseas capitalise most on the city's rich cultural offerings, visiting a number of attractions during their stay.

While nearly a quarter of travellers from abroad had visited between one and three attractions during their trip to London, almost one third (32%) had visited four to six—double the proportion of UK visitors to this many attractions. A further 24% of overseas tourists reported visiting seven to ten London attractions. This was six times the proportion of domestic tourists who had been to such a large quantity of attractions during a single visit.

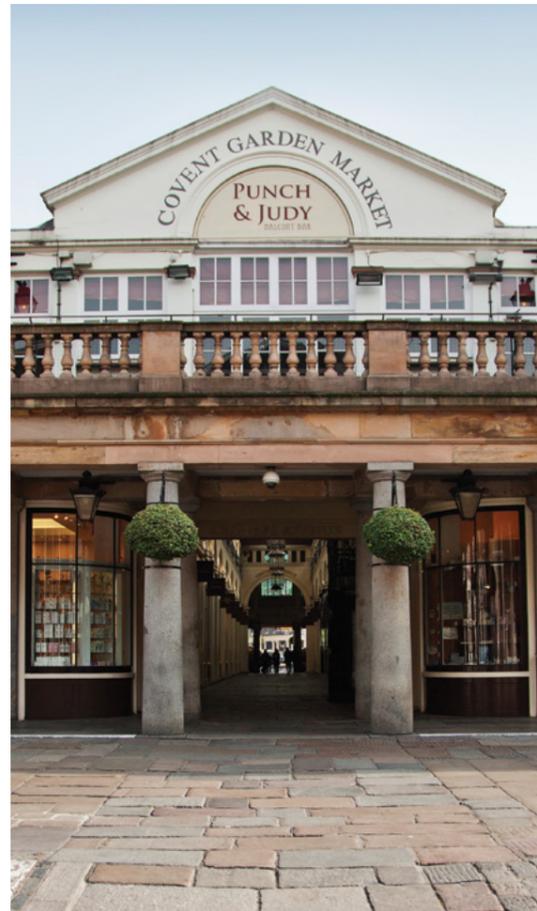
It can be inferred that this may be a consequence of overseas visitors' longer stays in the city. The international cultural tourist is also perhaps attempting to make the most of visits involving higher travel costs and more complicated planning than is likely to be required by domestic visitors.

Number of attractions visited during leisure trip to London: international vs. domestic visitors



The distribution for UK visitors is skewed to the lower end of the scale, with almost two thirds visiting between one and three attractions, while 15% visited none at all. Just 1% visited more than ten attractions during their visit to London, compared to almost one fifth of overseas visitors.

16% of domestic visitors, however, reported going to between four and six attractions during their trip, highlighting that a significant proportion of UK travellers do experience a variety of London's cultural offerings during their stay in the capital.



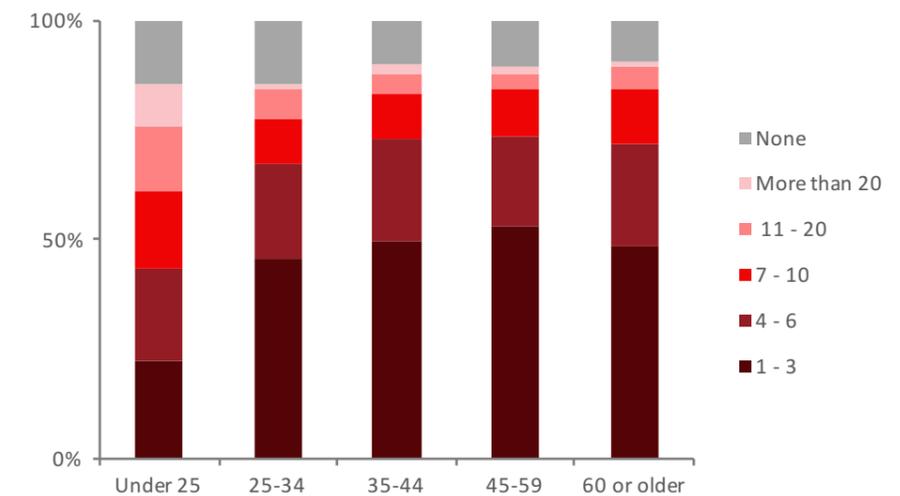
“
**Two out of three
 under 25s visited
 at least four
 attractions during
 their visit to
 London.**
 ”

Trends by age

Younger visitors to London are more likely to visit a greater number of attractions than their older counterparts.

This is particularly true of those under the age of 25; almost two thirds (63%) of these younger visitors went to four or more attractions during their trip to the capital. Moreover, the proportion of under 25s visiting more than twenty attractions was 10%—much higher than the 1 to 2% within each of the other age groups who visited this higher quantity of attractions.

Number of attractions visited during leisure trip to London: by age



Visitors aged twenty five or more typically went to between one and three attractions whilst in London; the case for around half of those within each age category except the under 25s. In comparison, a relatively small proportion (22%) of those under 25 visited just one to three attractions.

Around seven out of ten visitors in each age category—again excluding the under 25s—visited between one and six attractions during their trip to the capital. This figure is again much lower for the under 25s (44%), as 42% of these younger visitors took a trip to more than six attractions as part of their visit to London.



POPULAR ATTRACTIONS

International visitors were twice as likely as UK tourists to have visited London's top attractions.



Most visited attractions

- The Tower of London was the most visited attraction
- West End shows appeal most to domestic and older visitors
- London's historic attractions are most sought after by overseas tourists

Those surveyed were given a list of top London attractions and asked to highlight all those they had visited during their trip. The Tower of London proved most popular, visited by more than a third (36%) of respondents.

Almost 30% of those surveyed visited the London Eye during their visit to the capital, with similar proportions also paying visits to a West End show, Buckingham Palace, the British Museum, or the Houses of Parliament and Big Ben.

Galleries and museums also proved popular with cultural tourists, including attractions such as the National Gallery, the Natural History Museum, the V&A and Tate Modern.

Almost a third of respondents also indicated that they had visited places of interest not listed as an option. While these were spread thinly across responses, the most popular "other" attractions included historic churches like St. Paul's Cathedral, Royal Palaces such as Kensington and Hampton Court, live entertainment venues and theatres outside of the West End, and family attractions such as Warner Bros. Studio Tour London and London Zoo.

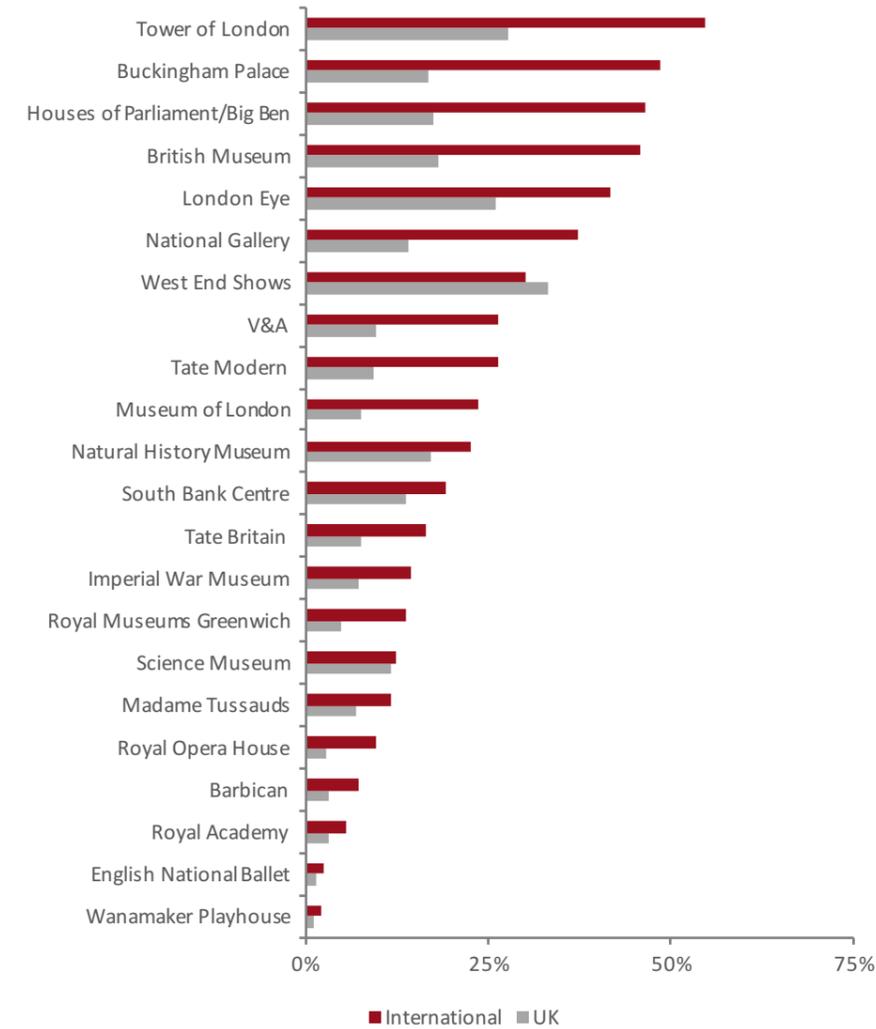
Whilst it is central London's offerings that still attract the bulk of visitors, this highlights that many of the city's tourists are venturing to attractions other than those that are typically sought after.

Trends by nationality

International visitors are, in almost every case, at least twice as likely as UK tourists to visit London's top attractions. This is in part due to overseas tourists visiting a higher number of attractions during their trip to London. The trend is also supported by recent research commissioned by L&P, which indicates that across London's top museums and galleries, overseas visitors represented 74% of all visits in 2014/15⁶ excluding visits from Londoners.

For these overseas visitors, London's historic Royal and political attractions hold most appeal. More than half of overseas respondents had visited the Tower of London during their trip to the city (55%), 49% had visited Buckingham Palace, while 47% had sought enjoyment from the Houses of Parliament and Big Ben.

London attractions visited: international vs. domestic visitors



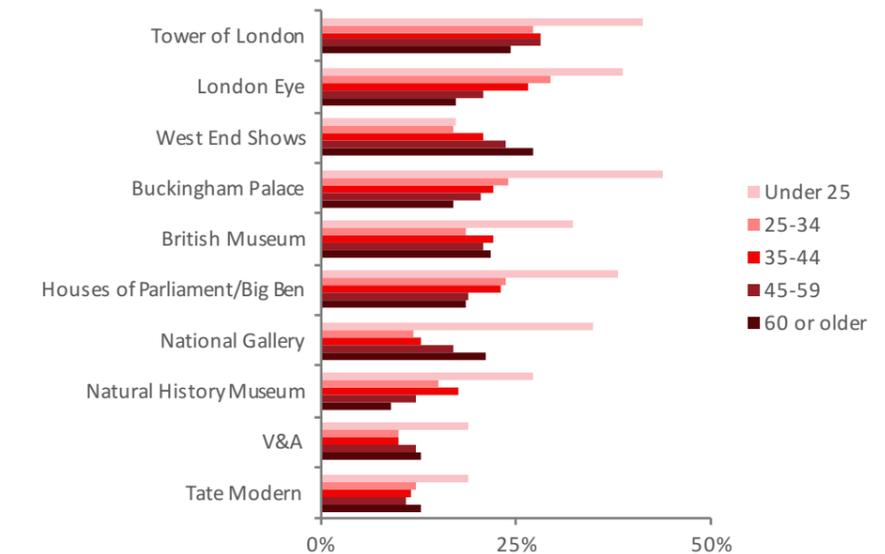
6. Research conducted by Morris Hargreaves McIntyre for L&P, 2015. Data for 1st April 2014-31st March 2015, based on museums and galleries that are part of MHM's London benchmarking group.

The most popular attractions for domestic visitors to the capital are West End shows, with a third of UK-based respondents paying a visit to the world's largest theatre district during their time in the city. While West End theatre also proved popular with 30% of international visitors, this was only the seventh most visited attraction amongst overseas tourists. The West End is far more popular, in relative terms, amongst domestic visitors.

Trends by age

London's top attractions⁷ were most popular with the under 25s. In our sample, the highest proportion of visitors to nine of the most popular ten attractions were from this age group. Only West End shows bucked this trend, with a higher proportion of over 60s visiting the theatre during their stay in the capital (27% of over 60s, compared to 17% of under 25s). More than 40% of those aged under 25 had visited Buckingham Palace, and a similar proportion the Tower of London, during their trip. The London Eye, the Houses of Parliament and Big Ben, and the National Gallery also proved particularly popular with this group.

Top 10 most visited London attractions: trends by age group



For both 25-34 and the 35-44 year olds, the Tower of London and the London Eye were the top two visited attractions, with the former group more likely to visit the London Eye (29%), and a higher proportion of the latter visiting the Tower of London (28%).

Whilst these two attractions were also popular amongst 45-59 year olds, West End Shows were their second most visited attraction (24%), ahead of the London Eye (21%). The West End also held most appeal amongst the 60+ age group (27%), illustrating the popularity of the theatre district with the more mature London visitor.

7. The top 10 attractions are based on those most visited by respondents to the survey.

PURCHASING TICKETS

Purchasing tickets and advance bookings

- **UK tourists are more likely to purchase attraction tickets than overseas visitors**
- **Domestic visitors are more likely to book tickets in advance**
- **30% of leisure tourists did not book any attraction tickets during their trip to the capital**

Respondents were asked which of London's attractions, if any, they had purchased tickets for. Tickets were most likely to have been purchased for attractions with restricted capacity, particularly where these were for live shows with limited performances. However, while a significant proportion of those surveyed indicated that they had visited attractions such as the Tower of London, the London Eye and Buckingham Palace, many of these same respondents stated that they had not bought tickets. This suggests that many tourists will class a "visit" as having occurred when they have seen the attraction, but not necessarily been inside it.

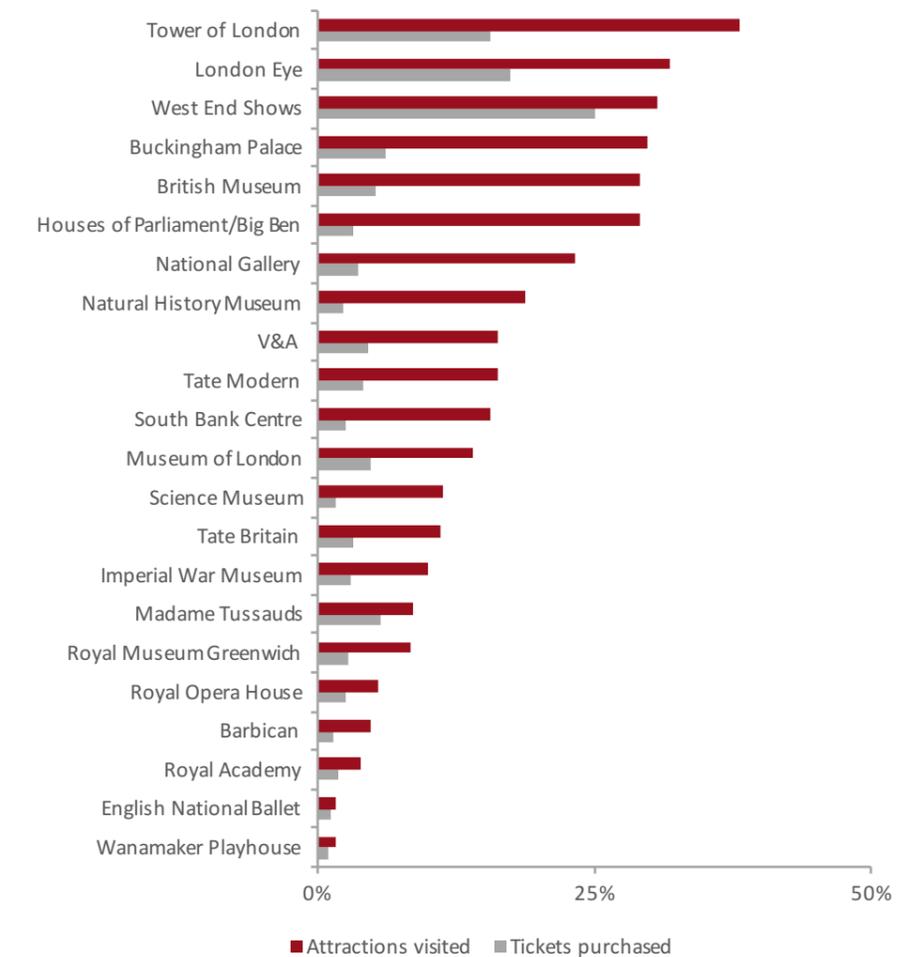
For example, while 36% of respondents reported visiting the Tower of London, less than half of these individuals (41%) bought a ticket. They may have wandered to the Tower and taken a photo outside of it—perhaps admiring the poppies commemorating World War I which will have been in place during many of these trips—without paying to go inside.

Interestingly, almost a third of respondents (30%) indicated that they had not purchased any attraction tickets during their trip to London, suggesting that many of the city's cultural tourists choose this approach⁸.

8. It is possible in some cases that those who stated that they went to an attraction but did not purchase a ticket may have visited as part of a package, and therefore did not buy a ticket themselves. Additionally, some visitors to West End shows may have been carers, who are not required to purchase a ticket.

Additionally, tickets for museums were least likely to have been purchased, with many visitors presumably opting to concentrate their visit on the free exhibitions. In all cases other than the Museum of London, for which 34% of attendees bought tickets⁹, less than a third of visitors to London's museums reported purchasing tickets. Therefore, it is apparent that the attractions themselves do not always benefit financially from cultural tourists' "visits".

Attractions visited and tickets purchased by leisure visitors

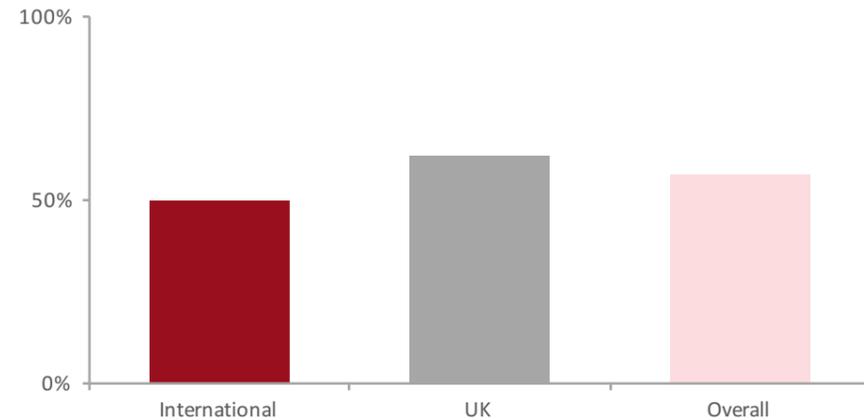


9. The Sherlock Holmes exhibition was on at the Museum of London during this period, which may explain this slightly higher purchase rate of tickets.

Trends by nationality

More than half of overall visitors who purchased a ticket to a London attraction did so in advance. UK visitors to London were more likely to have booked tickets in advance, with 62% having done so, compared to half of international visitors. This is largely driven by the popularity of live events and the West End among domestic tourists.

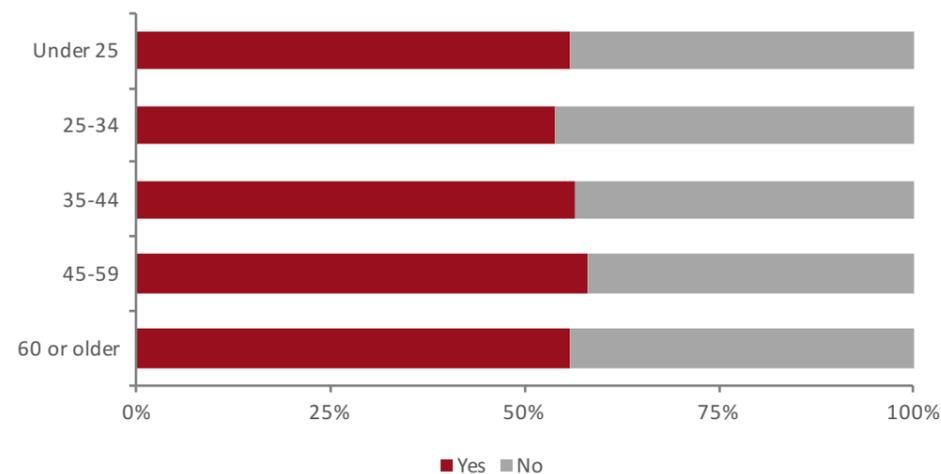
Attractions visited and tickets purchased in advance by leisure visitors: international vs. domestic



Trends by age

There were only subtle differences in trends for booking in advance by age. The 45-49 age group were marginally more likely to purchase attraction tickets ahead of their visit, with 58% reporting that they had done so. Those least likely to have booked in advance were 25-34 year olds (54%).

Attraction tickets booked in advance by leisure visitors: by age



CONCLUSION

Bearing in mind the value of cultural tourism to London's economy, this piece of research sought to gain a more detailed view of such trips to the capital, from the planning stage through to the holiday itself.

It uncovered that:

- The key driver for visiting London for 39% of leisure tourists is the cultural experiences offered by the capital.
- Of the sources of information available to visitors when planning their trip to London, recommendations by word of mouth have greatest currency, followed by the internet, while overseas visitors are particularly reliant on books and guides.
- Almost 9 out of 10 leisure visitors will experience at least one attraction during their trip to London.
- West End theatre is particularly popular with UK visitors, while international tourists are most likely to venture to London's historical attractions.
- 30% of London's cultural tourists do not purchase a ticket to the attractions they visit.

This research uncovers interesting trends about the factors influencing the cultural tourist's itinerary when in London and the number of attractions typically experienced during a leisure break. It also reveals the most popular attractions with such visitors, and the extent to which tickets for these were purchased in advance. In doing so, it has established how such visits to London—and priorities around these—differ depending on the age and nationality of the cultural tourist.

As this work sheds light on the phenomenon of cultural tourism in London, we hope that it will contribute to effective strategic approaches to both retain and increase future numbers of these valuable visitors to the capital.

Contacts

This research was undertaken by London & Partners' Strategy and Insights 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.

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