

London Attractions Monitor

Q4 2017 and Annual Review 2017



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01

Attractions Monitor Q4 2017

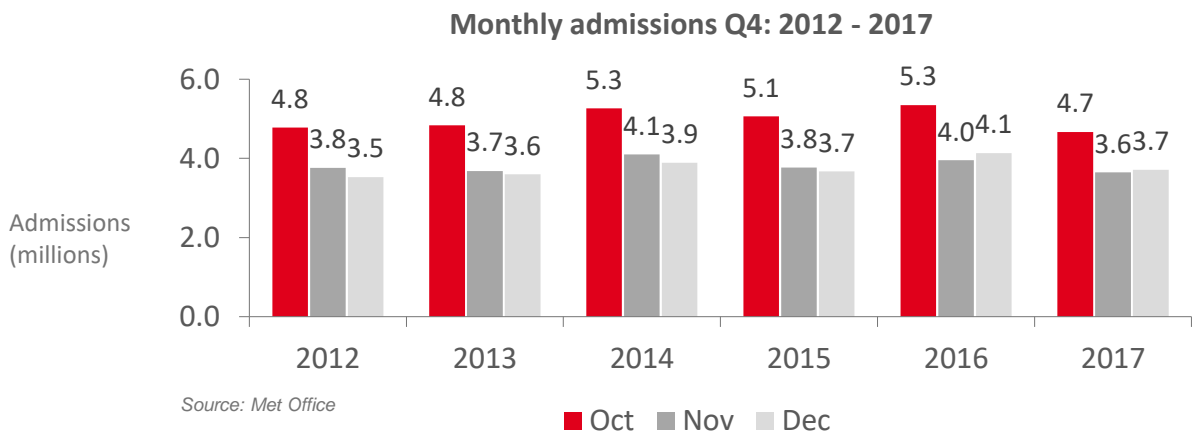
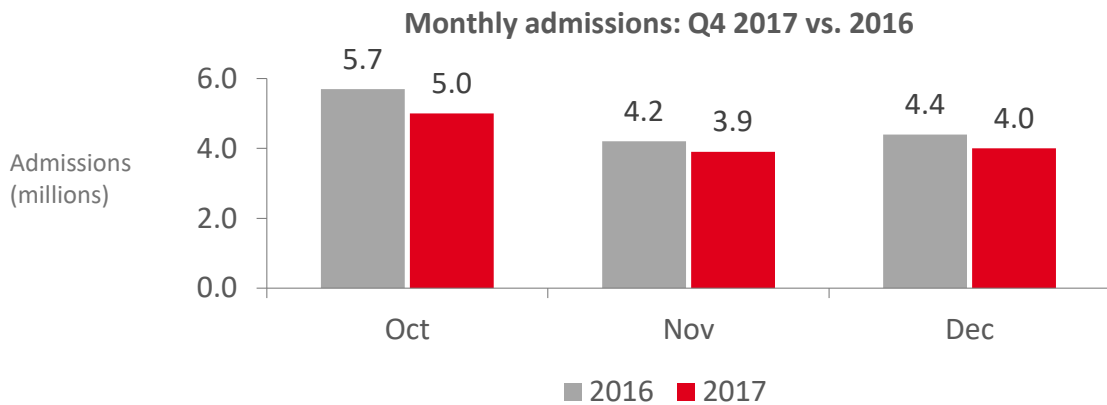
Attraction admissions at a five year low for Q4 -9 per cent reduction in admissions witnessed during the last three months of 2017

- There were 12.9 million admissions to London attractions during Q4 (Oct-Dec) 2017, a fall of 9 per cent against Q4 2016.
- The fall in admissions during Q4 2017 makes it the poorest performing final quarter since 2011.
- Free and charging attractions both experienced year-on-year decreases against Q4 2016.
- The largest fall in visits were seen in Zone 1, as admissions to attractions in central London fell by –10.2 per cent. Attractions outside of central London witnessed a decrease in admissions of only -3.6 per cent.
- Small and medium-sized attractions recorded increases in admissions of 8.3 per cent and 1.9 per cent respectively. Large attractions had a less positive year, recording a -10.7 per cent fall in visits.
- Entertainment and Gallery attractions both experienced decreases of more than -10 per cent in admissions.

Q4 2017 admissions decreased by -9 per cent compared to Q4 2016

Attraction admissions at a five year low for Q4

- There were 12.9 million admissions to London attractions during Q4 (Oct-Dec) 2017, a reduction of -9 per cent against Q4 2016.
- Comparisons are made against a strong Q4 2016, when there was an 8 per cent increase in admissions to attractions. The reduction in Q4 2017 sees attractions receive fewer admissions than two years ago.
- The fall in attraction admissions during Q4 2017 places Q4 admissions marginally below levels five years ago in Q4 2012, with a -0.4 per cent fall over the past five years.

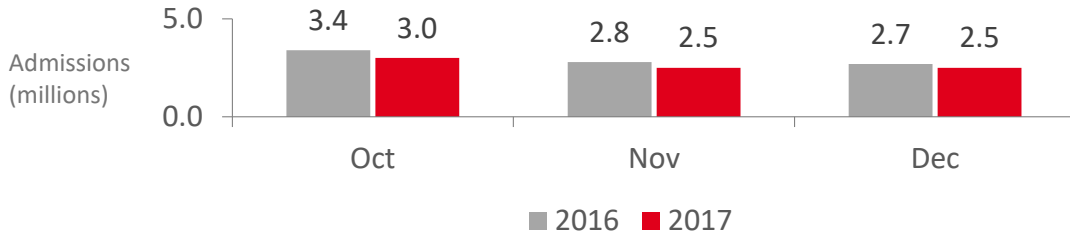


Figures based on data received from 55 London attractions for 2017 year-on-year comparison. Five year data is based on 38 attractions. Further attractions were excluded from the analysis where full data was unavailable for the duration of each analysis.

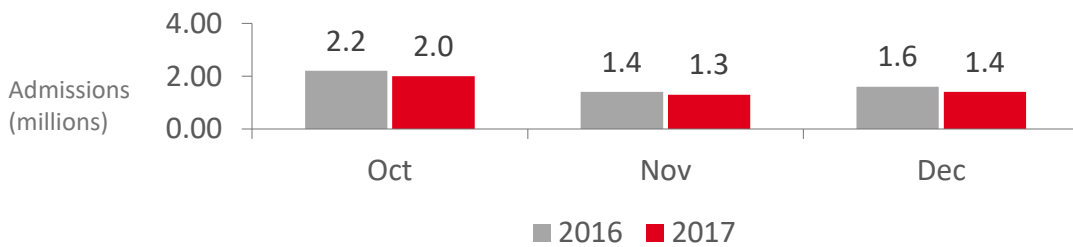
Admissions to free and charging attractions both decreased against Q4 2016

- There were reductions in admissions to both free and charging in admissions during Q4 2017.
- There was little difference between charging and free attractions. 69 per cent of charging attractions in the sample witnessed a year-on-year decrease, compared to 63 per cent of free attractions.
- Charging attractions recorded a -8.7 per cent overall decrease in admissions during the quarter, with fewer admissions in each month versus 2016.
- Admissions to free attractions fell by -9.8 per cent against Q4 2016, with reductions in every month of the quarter.

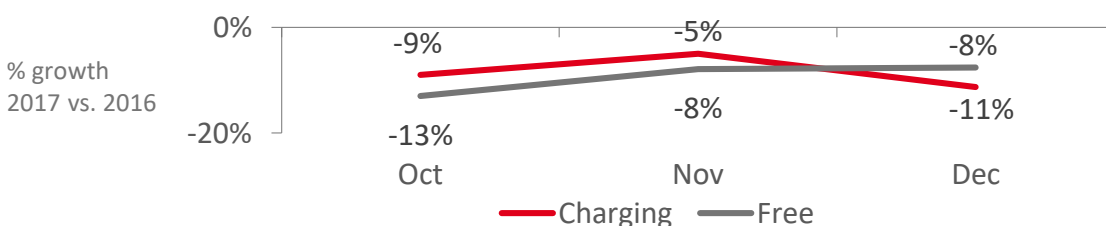
Monthly admissions to free attractions



Monthly admissions to charging attractions



Change in admissions: free vs. charging

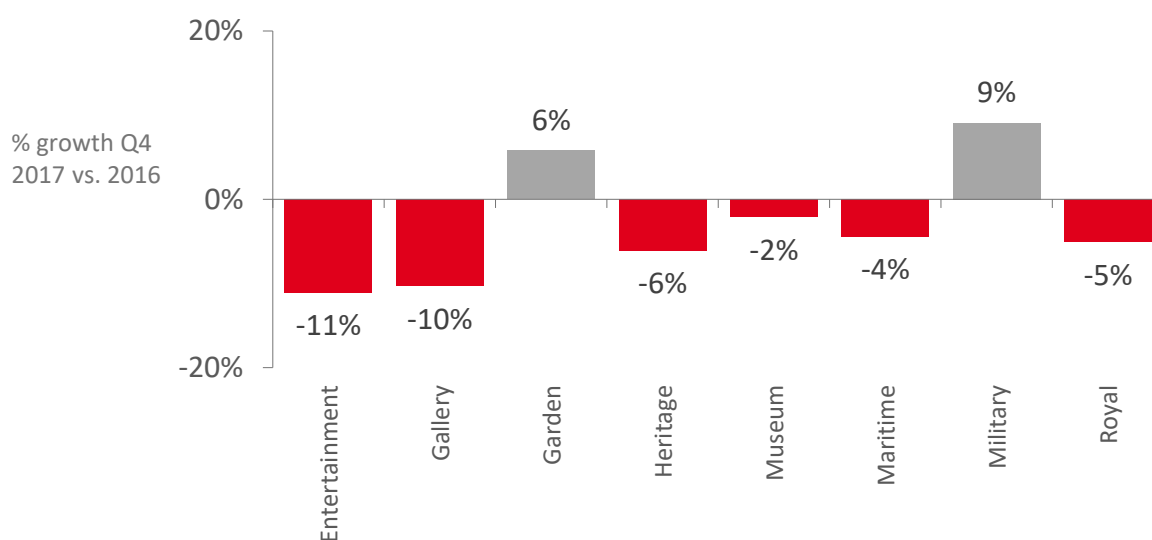


Most types of attractions recorded a year-on-year fall in admissions during Q4 2016

However it was a strong period for military and garden attractions

- Military and garden attractions were the only categories of attractions to see visitor growth in Q4 2017.
- Entertainment attractions and galleries witnessed the largest falls in admissions, at -11 per cent and -10 per cent respectively.
- Despite seeing a 7 per cent growth rate across the full year 2017, Admissions to royal attractions fell by -5 per cent year-on-year reduction in admissions during the last quarter of 2017.

Change in admission levels by attraction type:
Q4 2017 vs. 2016



Categories are not mutually exclusive. Some attractions appear in more than one category.
Sports attractions are without sufficient data for inclusion.

02

Annual Review 2017

London attractions received 59 million admissions in 2017

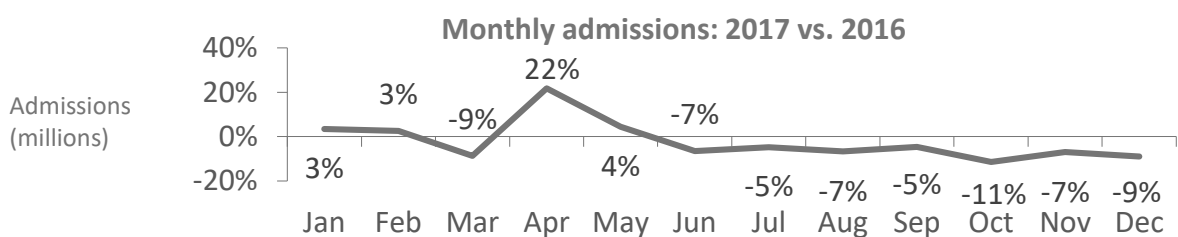
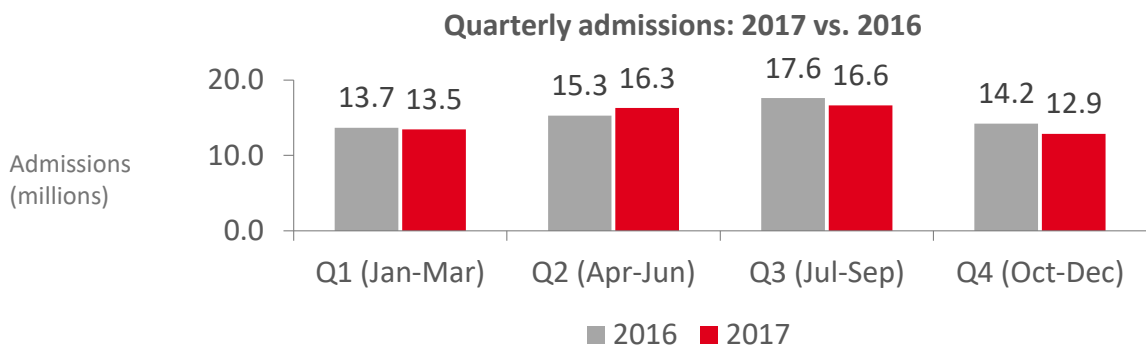
-2 per cent decrease overall on 2016

- Total admissions to London attractions during 2017 reduced by -2 per cent year-on-year.
- Q2 2017 saw strong growth in admissions of 6.5 per cent, but attractions recorded fewer admissions in all other quarters.
- Q4 was the poorest performing quarter of the year, with -9.4 per cent fewer visitors compared to 2016.
- Admissions to free attractions fell by -3 per cent over the year. Charging attractions witnessed a smaller reduction of -1 per cent.
- Attractions based outside of Zone 1 remained resilient during the year as admissions were steady compared to 2016. By contrast admissions to attractions in central London fell by -3 per cent.
- Admissions to large and small attractions both fell, but there was strong growth in admissions to medium-sized attractions over the year.
- Garden and royal attractions saw growth in visitors, but there were reductions in admissions to all other categories of attraction over the year.
- Admission figures in 2017 were 8% greater than in 2012, with 55.4 million admissions recorded from 36 attractions. Although figures are up on the five year trend, 2017 is the third consecutive year in which attraction admissions have reduced.

London attractions received 59m admissions in 2017

-2 per cent reduction from 2016

- London attractions received 59 million admissions in 2017, a -2 per cent reduction from 2016, when 60.7m admissions were recorded.
- The year began with a slight reduction in the admissions of -1 per cent during the first three months of the year.
- Q2 was the strongest period of year-on-year growth for London attractions in 2017, with an 7 per cent increase in admissions compared to Q2 2016.
- However, significant year-on-year falls in admissions were seen in the second half of the year, with a -5 per cent reduction in admissions during Q3 and a -9 per cent fall in Q4 2017, the worst performing quarter of the year.



Average weather for South East England 2017 (change compared to 2016 in brackets)												
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Mean temp °C	3.7 (-2.0)	6.4 (+1.0)	9.2 (+3.1)	9.4 (+1.3)	13.5 (+0.5)	16.9 (+1.4)	17.8 (+0.3)	16.4 (-1.5)	14 (-2.7)	12.7 (+1.5)	7.1 (+0.7)	5.2 (-0.9)
Hours of sunshine	77.6 (+17.9)	53.8 (-35.6)	131.8 (-5.2)	205.3 (+29.4)	199.3 (-14.7)	244.4 (+117.3)	207.4 (-5.6)	201.4 (-33.1)	138.1 (-1.3)	95.9 (-47.7)	84.2 (+0.3)	53.3 (-10.8)
Rainfall (mm)	83.3 (-48.5)	53.6 (-3.1)	43.9 (-42.9)	9.8 (-41.4)	69.2 (+5.1)	58.2 (+33.1)	103.6 (+86.2)	73 (+34.2)	71.6 (+20.7)	31.7 (+1.6)	50.4 (-52.7)	107.3 (+88.5)

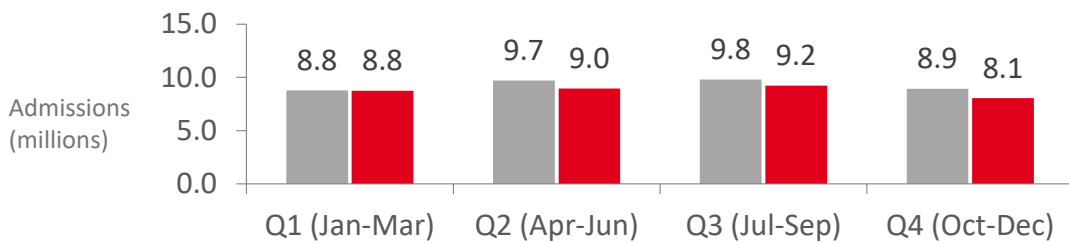
Source: Met Office

Charging attractions recorded a -1 per cent overall reduction in admissions

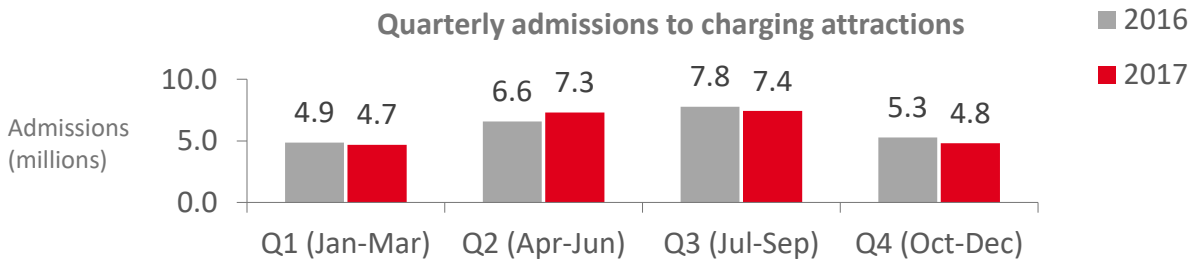
Free attractions saw a -3 per cent overall decline

- Q2 was the strongest growth period for both charging and free attractions – with 11 per cent and 3 per cent year-on-year increases in admissions respectively against Q2 2016.
- Both free and charging attractions experienced a reduction in admissions in all other quarters of the year.
- Q1 was the only quarter of 2017 in which free attractions had better year-on-year admission figures than charging attractions.
- The strongest month for growth in admissions to both free and charging attractions was April 2017, as attractions benefited from a strong Easter period.

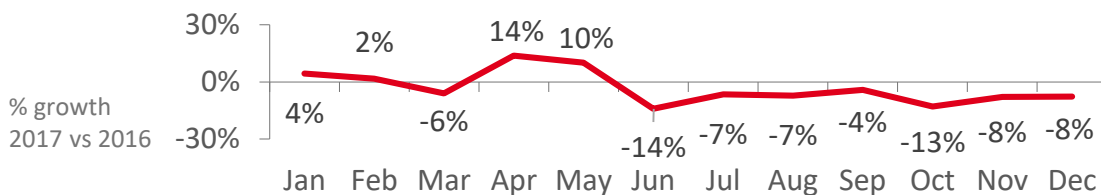
Quarterly admissions to free attractions



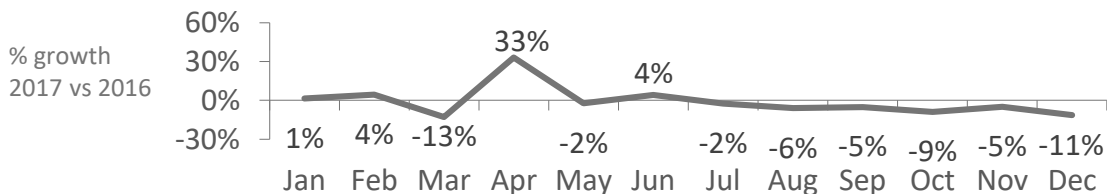
Quarterly admissions to charging attractions



Change in monthly admissions to free attractions



Change in monthly admissions to charging attractions

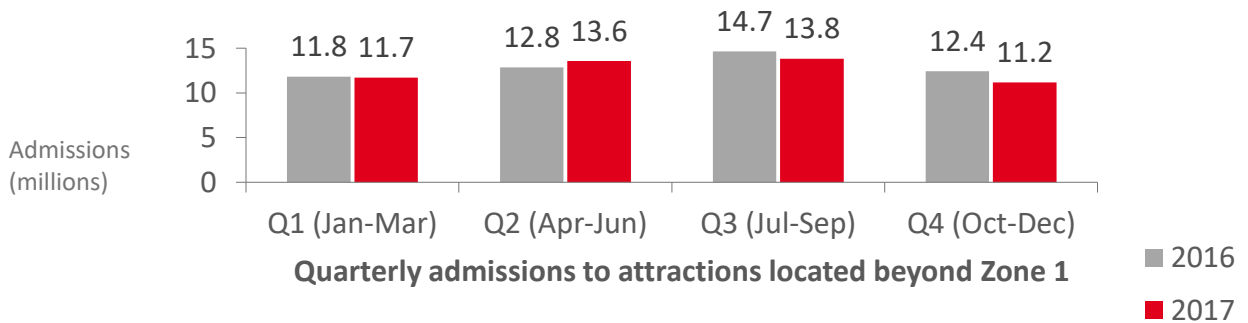


Zone 1 attractions recorded a -3 per cent decline in 2017

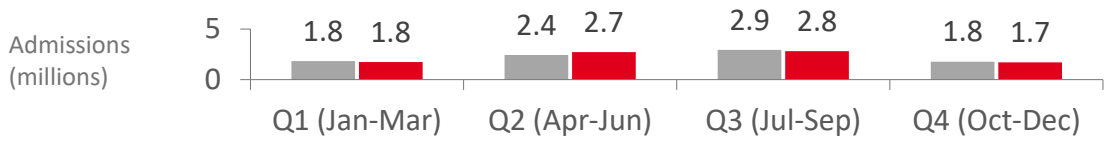
Attractions in outer London had steady admission numbers during the year

- Zone 1 attractions, which represent two thirds of the sample and 85 per cent of admissions, saw overall admissions decline by -3 per cent compared to 2016, with 1.5 million fewer admissions overall.
- For attractions both within and outside of Zone 1, Q2 was the only quarter of growth in admissions. 12 per cent growth for attractions in Zones 2-6 during this period allowed annual figures to remain stable despite recording fewer admissions in the all other quarters.
- Q1 was the only quarter in which Zone 1 attractions performed better than those outside central London, with a -1 per cent reduction in visitors compared to a -5 per cent reduction in attractions outside Zone 1.

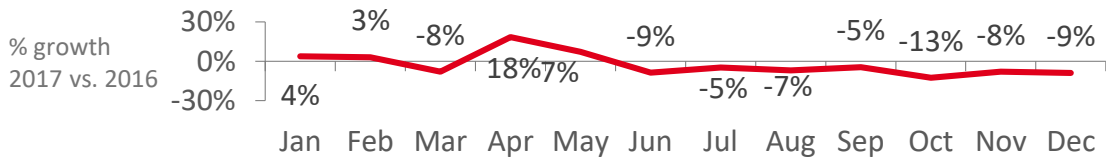
Quarterly admissions to attractions located in Zone 1



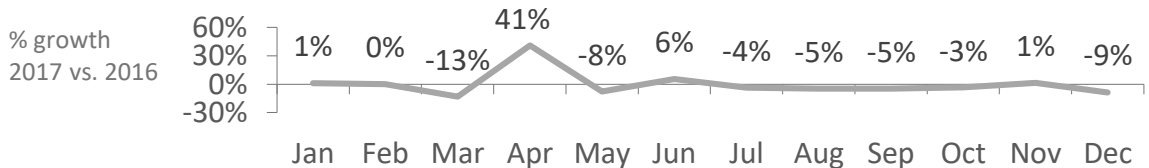
Quarterly admissions to attractions located beyond Zone 1



Change in monthly admissions to Zone 1 attractions:



Change in monthly admissions to attractions located beyond Zone 1

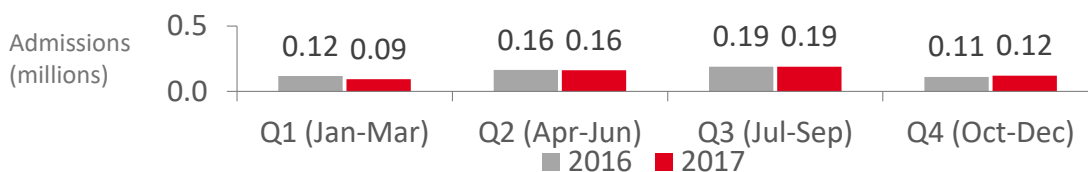


Admissions to large attractions reduced in 2017

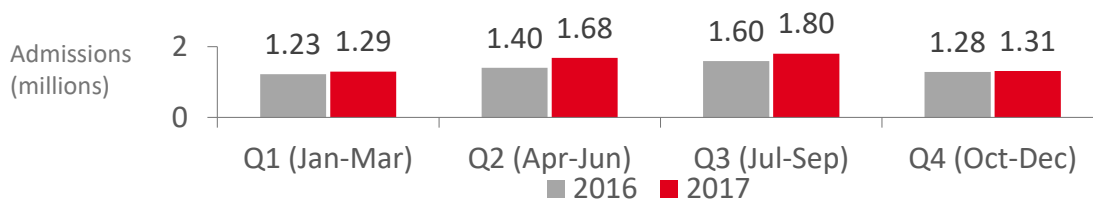
However, medium sites recorded overall increases

- Overall admission levels to London's largest attractions fell in 2017 by -4 per cent, with 2 million fewer admissions over the year.
- Admissions to large attractions increased by 5 percent in Q2, but declined in all other quarters.
- Admissions to medium-sized attractions increased in all quarters of 2017, including 20 per cent growth in Q2. There was a 10 per cent overall increase in admissions to medium-sized attractions over the full year.
- Small attractions witnessed a -21 per cent reduction in admissions during Q1 2017, but stable admissions in the rest of the year and growth in Q4 led to overall admissions recording a reduction of only -3 per cent over the year.

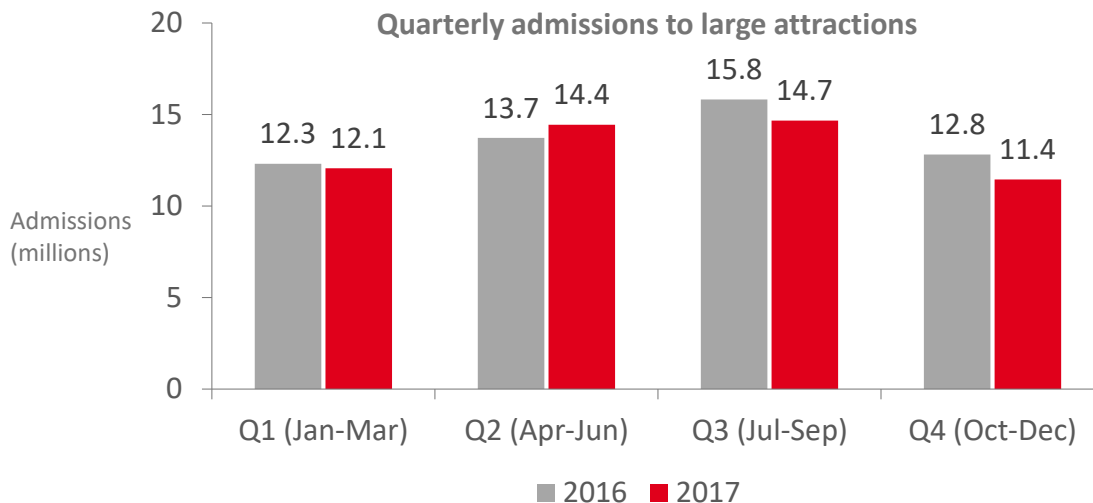
Quarterly admissions to small attractions



Quarterly admissions to medium attractions



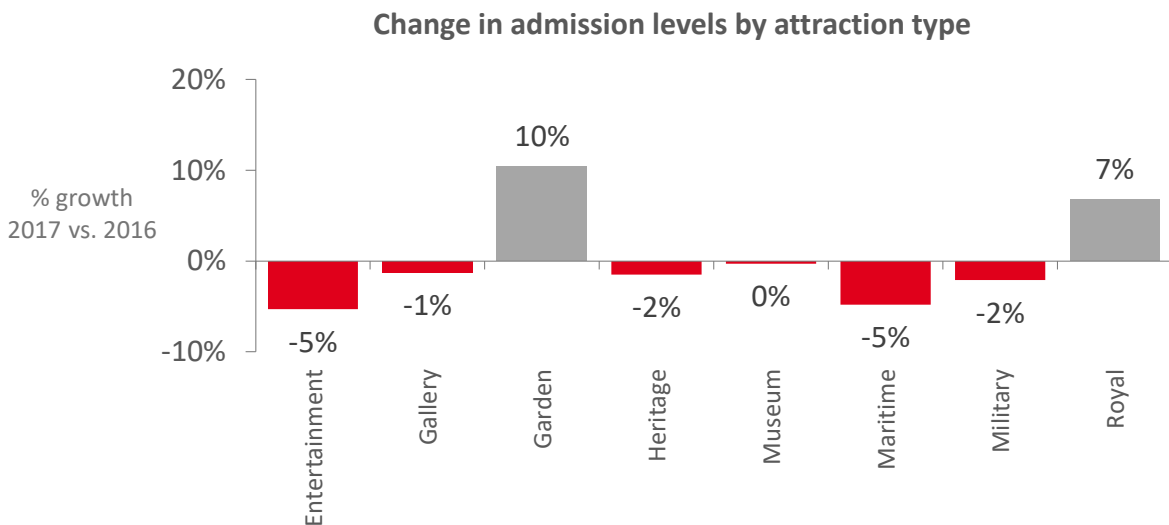
Quarterly admissions to large attractions



Attraction size based on overall admissions for 2017:
 Small: fewer than 200,000 admissions per annum
 Medium: 200,000 to 999,999 admissions per annum
 Large: One million+ admissions per annum

Admissions to garden and royal attractions grow while other categories see fewer admissions

- Royal attractions and gardens witnessed year-on-year increases, while admissions fell for all other categories in 2017.
- Garden attractions witnessed growth in admissions of 10 per cent, the highest percentage increase across the different types of attractions.
- Royal attractions recorded an overall 7 per cent increase in admissions compared to 2016.
- The biggest decline came from entertainment attractions, which had 710,000 fewer admissions compared to 2016, a -5 per cent reduction on 2016.
- London's largest categories of attractions - museums, heritage and galleries - each saw small to marginal reductions in admissions during 2017.

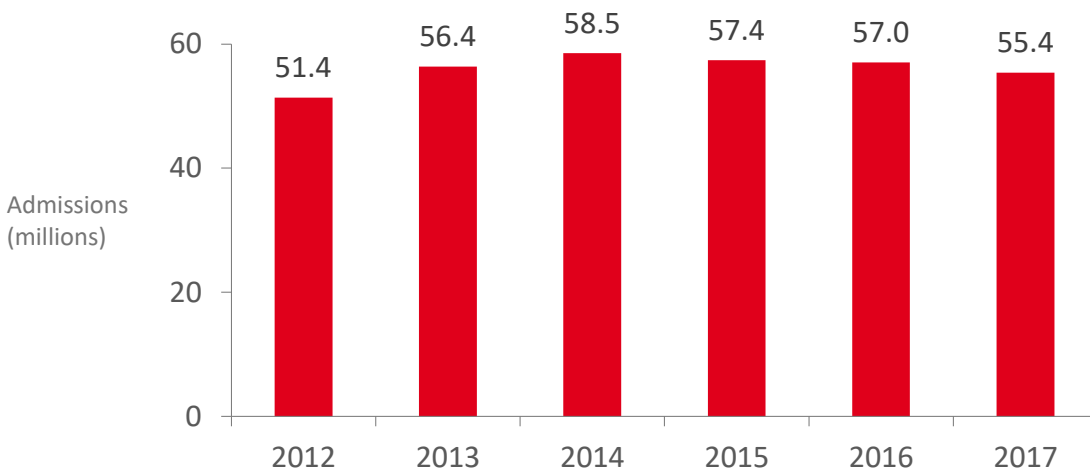


Categories are not mutually exclusive. Some attractions appear in more than one category. Sports attractions are without sufficient data for inclusion.

There has been an 8 per cent increase in admissions to London attractions over the past five years

- Admission figures in London during 2017 were at the lowest level since 2013. Admissions remain 8 per cent above those seen in 2012.
- 2017 is the third consecutive year in which admissions have fallen year-on-year.

Annual admissions 2012 - 2017



Five year data based on 36 attractions. Additional attractions excluded from this analysis where five year data was unavailable, to allow like-for-like comparison.

Participating Attractions

Apsley House	Museum of Docklands
ArcelorMittal Orbit	Museum of Freemasonry
Bank of England	Museum of London
Barbican	Museum of Rugby
Billingsgate Bathhouse	National Army Museum
British Museum	National Gallery
Chelsea FC	National Maritime Museum
Chiswick House	National Portrait Gallery
Churchill War Rooms	Natural History Museum
Courtauld Gallery	Old Royal Naval College
Cutty Sark	Queen's House
Down House	RAF Museum
Dr Johnson's House	Ranger's House
Eltham Palace	Royal Observatory, Greenwich
Geffrye Museum	Science Museum
Guildhall Art Gallery	Sea Life London Aquarium
Hampton Court Palace	Shakespeare's Globe Theatre
HMS Belfast	Shrek's Adventure
Horniman Museum and Gardens	Sir John Soane's Museum
House of Parliament Tours	St Paul's Cathedral
Household Cavalry Museum	Tate Britain
Imperial War Museum	Tate Modern
Jewel Tower	Tower Bridge
Kensington Palace	Tower of London
Kenwood House	V&A Blythe House
Kew Gardens	V&A Museum
London Dungeon	V&A Museum of Childhood
London Eye	Wallace Collection
London Transport Museum	Wellington Arch
Madame Tussauds	Wembley Stadium
Marble Hill House	Wimbledon Lawn Tennis Museum
Monument	

We're very grateful to all of the above attractions for supplying us with the monthly data that allows us to compile this report. To discuss how you can also become involved in the London Attractions Monitor, please contact:

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