THE LONDON ATTRACTIONS MONITOR

Q4 + Annual Report 2023

(Oct – Dec)

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Introduction

The London Attractions Monitor is a report based on admission figures from many top attractions within the city.

This Q4 report is based on data from 37 attractions across a range of London's museums, galleries, gardens, and visitor experiences.

Annual analysis features data from 32, from those attractions participating all year round.

Data from participating attractions is included where there is complete data across the reporting period. Where a venue closed for a significant period, data will be excluded to ensure comparability.
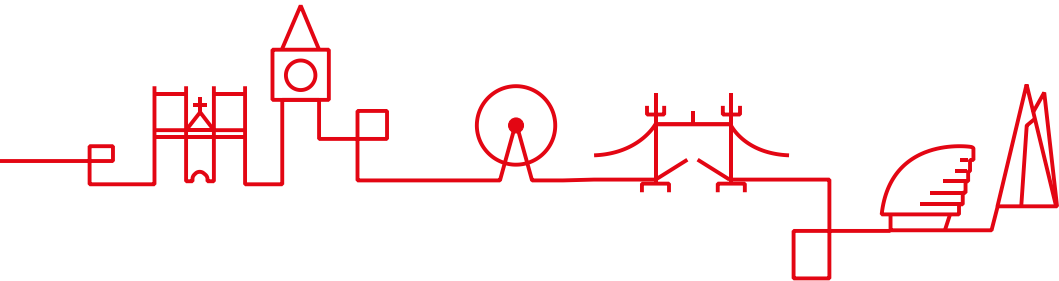
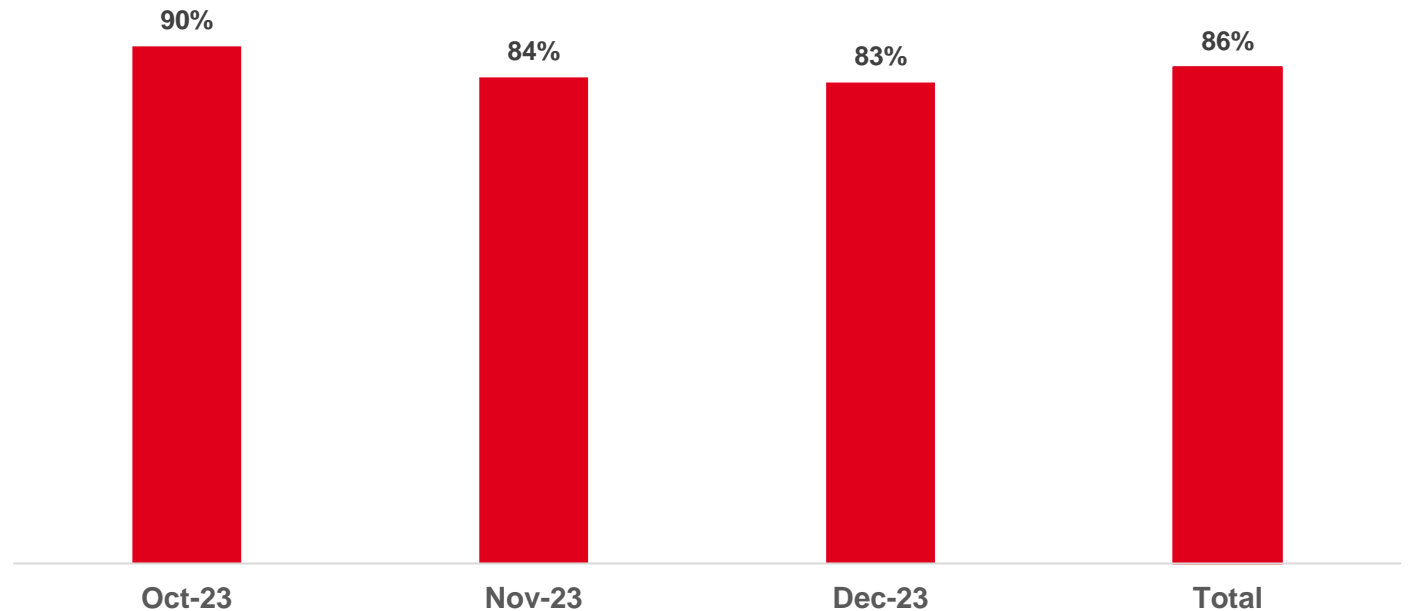# Q4 - 2019 QUARTERLY BENCHMARK

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Admissions drop off at the end of the year

Following a strong October, admissions to London's attractions waned over November and December.

The end of quarter figures stand at 14% below that of 2019.

Total admissions as a percentage of 2019, Q4 2023

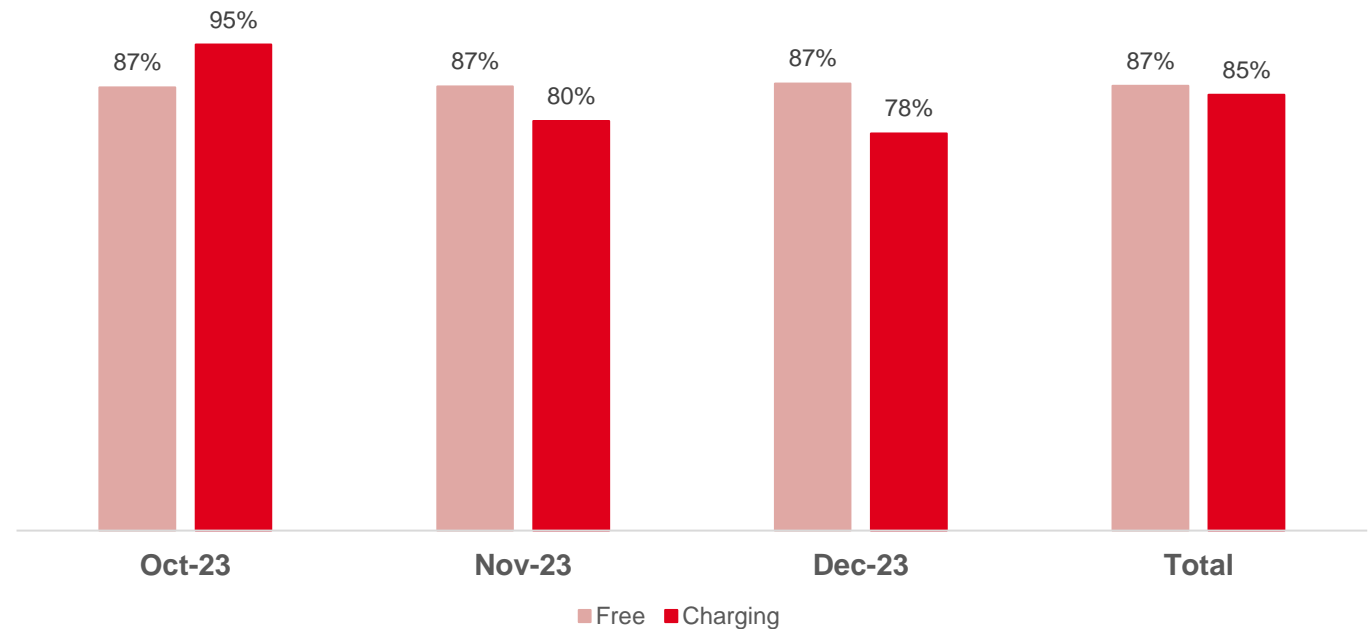|			
90%	84%	83%	86%
Oct-23	Nov-23	Dec-23	Total

Source: London Attractions Monitor, London & Partners, based on the total visitor numbers of the 37 reporting attractions

Overall, there was minimal difference between free and charging attractions

By the end of the quarter, free attractions performed only slightly better than charging attractions.

This is perhaps due to a high performing month for charging attractions in October.
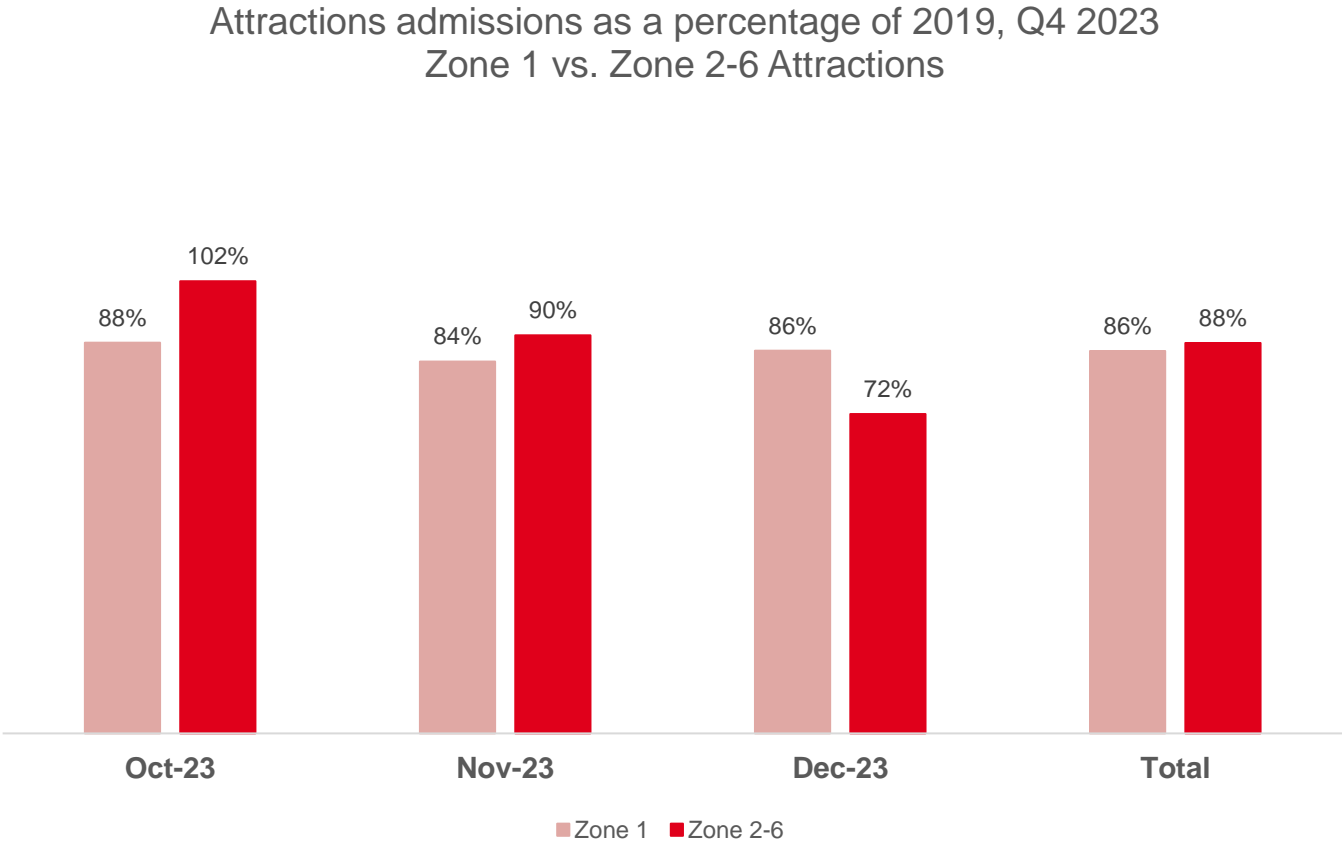
Attractions admissions as a percentage of 2019, Q4 2023
Free vs. Charging Attractions

	Oct-23	Nov-23	Dec-23	Total
Free	87%	87%	87%	87%
Charging	95%	80%	78%	85%

■ Free ■ Charging

Source: London Attractions Monitor, London & Partners, based on the total visitor numbers of the 37 reporting attractions

Zone 1 overtakes admissions in outer London in December

As the capital experiences an increasing number of arrivals for the Christmas period, admissions in zone 1 enjoyed a stronger December than those in zones 2-6.

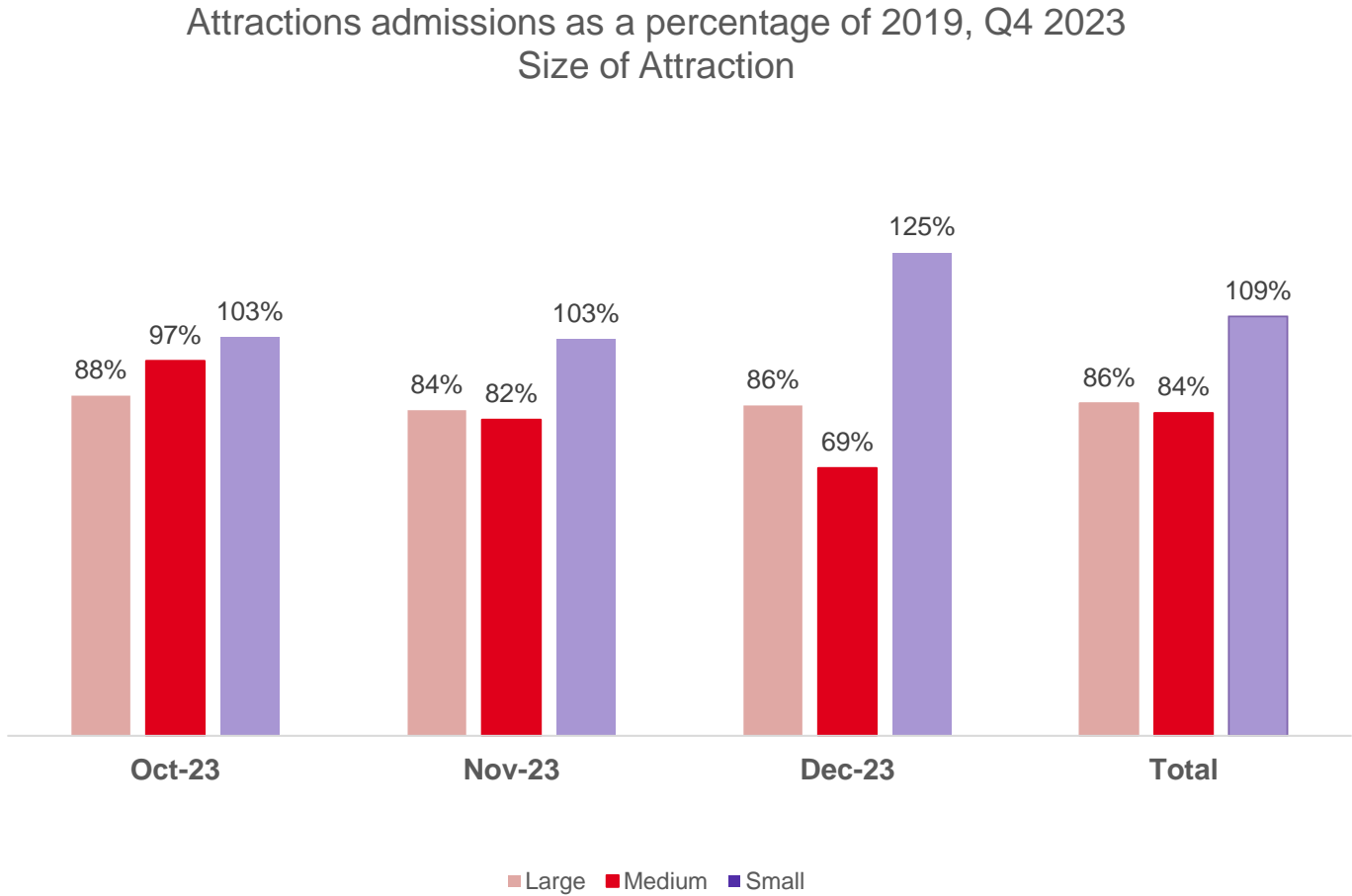Overall, there were marginal difference between inner and outer London attractions in Q4.

Attractions admissions as a percentage of 2019, Q4 2023
Zone 1 vs. Zone 2-6 Attractions

	Oct-23	Nov-23	Dec-23	Total
Zone 1	88%	84%	86%	86%
Zone 2-6	102%	90%	72%	88%

■ Zone 1 ■ Zone 2-6

Smaller venues consistently outperform 2019 levels in Q4

Overall figures show admissions to smaller venues were 9% up on 2019 levels in Q4.

Whilst all sizes of venues experienced high performance in October, medium attractions tailed off in December when compared to small and larger venues.
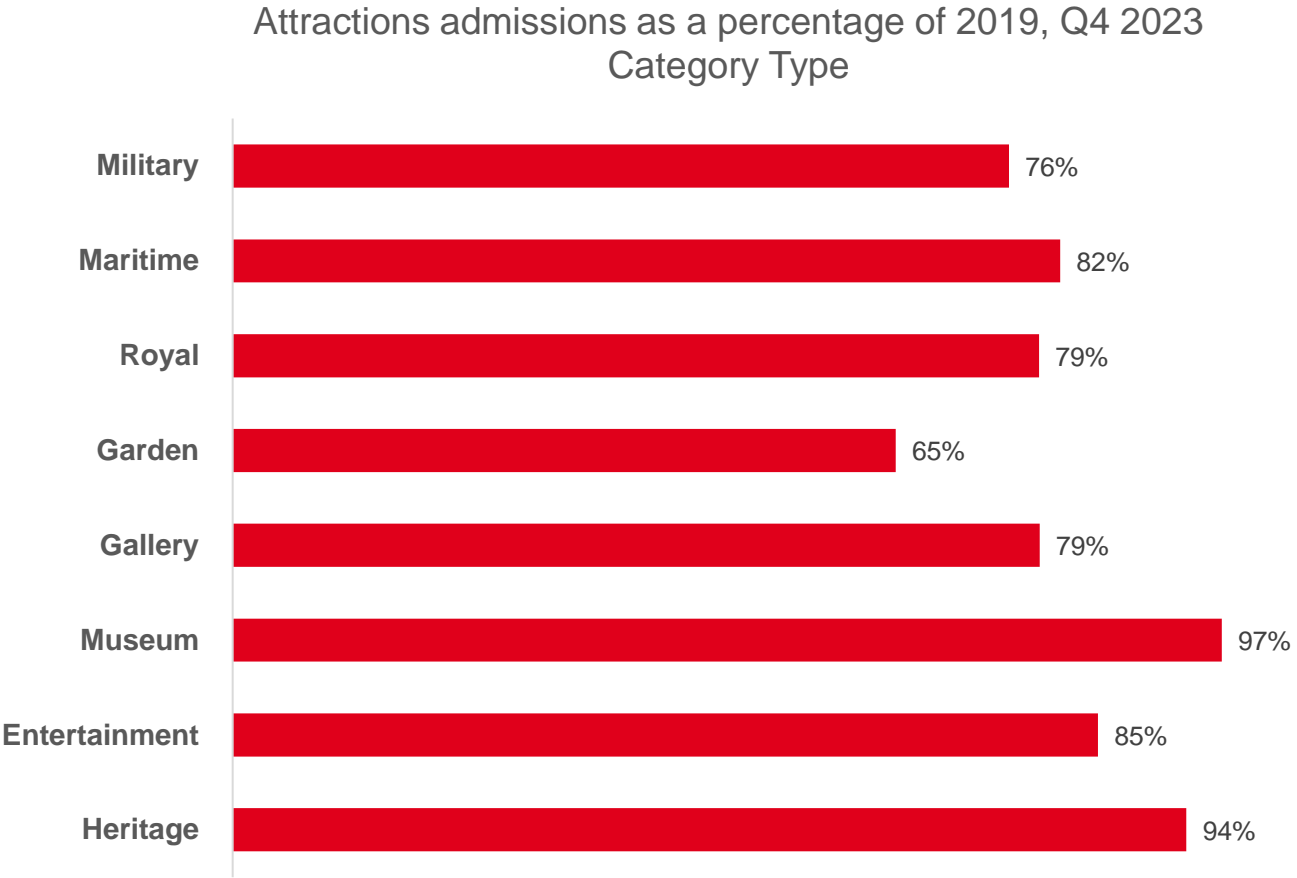
Attractions admissions as a percentage of 2019, Q4 2023
Size of Attraction

Legend: Large, Medium, Small

Oct-23: 88%, 97%, 103%
Nov-23: 84%, 82%, 103%
Dec-23: 86%, 69%, 125%
Total: 86%, 84%, 109%

Source: London Attractions Monitor, London & Partners, based on the total visitor numbers of the 37 reporting attractions

Museums & heritage venues were close to reaching 2019 levels in Q4

Museums and heritage have shown consistency throughout 2023 for high performance against 2019.

Garden venues fall short in Q4, perhaps owing to the harsh winter.

Attractions admissions as a percentage of 2019, Q4 2023
Category Type

Category	Percentage
Military	76%
Maritime	82%
Royal	79%
Garden	65%
Gallery	79%
Museum	97%
Entertainment	85%
Heritage	94%

Source: London Attractions Monitor, London & Partners, based on the total visitor numbers of the 37 reporting attractions

NB. some attractions fall into more than one category type
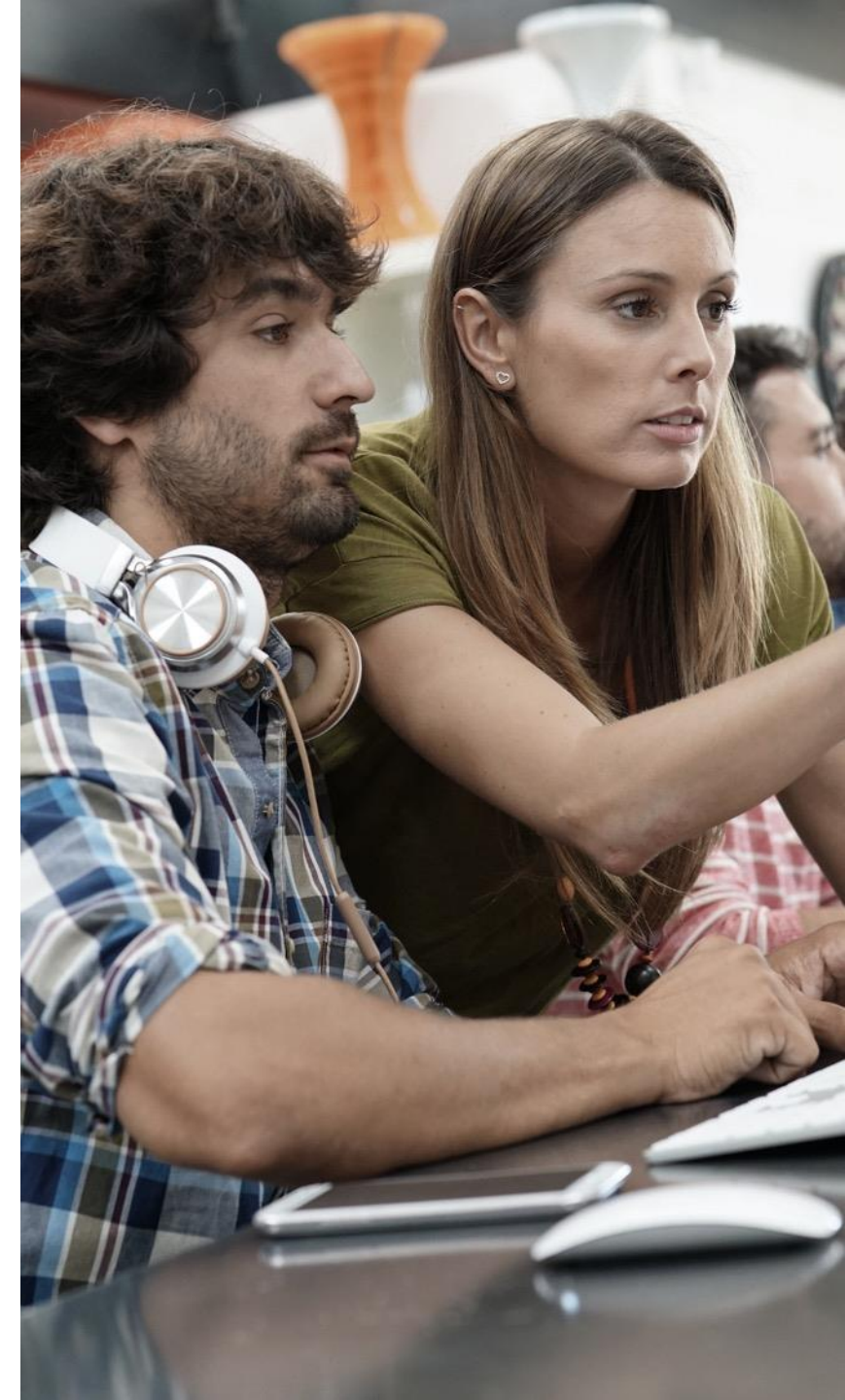
Data appendix

	Oct-19	Nov-19	Dec-19		Oct-23	Nov-23	Dec-23		Oct-23	Nov-23	Dec-23	TOTAL
Total	5,331,863	4,149,886	4,376,585		4,787,244	3,501,423	3,653,728		-10.2%	-15.6%	-16.5%	-13.8%
Zone 1	4,538,456	3,561,863	3,626,668		3,979,576	2,974,270	3,114,100		-12.3%	-16.5%	-14.1%	-14.1%
Zone 2-6	793,407	588,023	749,917		807,668	527,153	539,628		1.8%	-10.4%	-28.0%	-12.1%
Free	3,247,503	2,721,021	2,666,552		2,809,554	2,359,082	2,327,921		-13.5%	-13.3%	-12.7%	-13.2%
Charging	2,084,360	1,428,865	1,710,033		1,977,690	1,142,341	1,325,807		-5.1%	-20.1%	-22.5%	-14.9%
Large	4,473,336	3,552,143	3,654,322		3,948,528	3,001,127	3,130,694		-11.7%	-15.5%	-14.3%	-13.7%
Medium	797,086	549,215	684,478		775,247	450,350	475,689		-2.7%	-18.0%	-30.5%	-16.2%
Small	61,441	48,528	37,785		63,469	49,946	47,345		3.3%	2.9%	25.3%	8.8%
Heritage	1,990,649	1,488,993	1,568,449		1,880,247	1,365,404	1,496,165		-5.5%	-8.3%	-4.6%	-6.1%
Entertainment	1,202,596	875,003	955,265		1,131,683	649,624	803,741		-5.9%	-25.8%	-15.9%	-14.8%
Museum	2,388,400	1,893,988	1,966,041		2,373,817	1,831,006	1,882,346		-0.6%	-3.3%	-4.3%	-2.6%
Gallery	1,744,367	1,489,942	1,453,545		1,367,507	1,224,164	1,135,146		-21.6%	-17.8%	-21.9%	-20.5%
Garden	327,252	221,726	340,144		279,465	150,823	150,380		-14.6%	-32.0%	-55.8%	-34.7%
Royal	733,930	486,545	679,876		676,367	401,051	431,753		-7.8%	-17.6%	-36.5%	-20.6%
Maritime	343,333	236,833	301,419		310,780	201,551	206,207		-9.5%	-14.9%	-31.6%	-18.5%
Military	269,175	203,871	184,472		217,854	147,107	137,892		-19.1%	-27.8%	-25.3%	-23.5%

Participating attractions

British Museum
Churchill War Rooms
Dr Johnson's House
Emirates Air Line
Guildhall Art Gallery
Hampton Court
HMS Belfast
Horniman
Imperial War Museum
Kew Gardens
London Dungeon
London Eye
Madame Tussauds
Monument
Museum of Docklands
Museum of Freemasonry
Museum of Rugby
Museum of the Home

National Gallery
National Portrait Gallery
Natural History Museum
Old Royal Naval College
Royal Museums Greenwich
Science Museum
Sea Life London Aquarium
Shrek's Adventure
Sir John Soane's Museum
St Paul's Cathedral
Tate Britain
Tate Modern
Tower Bridge
Tower of London
Up at the O2
V&A Museum
V&A Museum of Childhood
Wallace Collection
ZSL London Zoo

Annual Report

Annual volume of admissions for participating attractions

Annual figures show a 26% y-o-y increase in admissions to London's attractions.

Q3 is typically the strongest month for visitors to London's attractions.

Rank	2019	2020	2021	2022	2023
Number of visits	60,000,000	14,000,000	16,300,000	39,800,000	50,400,000
Annual % change		-77%	16%	144%	26%
Compared to 2019			-73%	-34%	-16%

Admissions by quarter, by year

Monthly trends comparison 2019 – 2023

Seasonal trends for 2023 show a similarity with 2019.

There was slower growth than is typical between July and August in 2023, as the attractions trends flatten over the summer period.

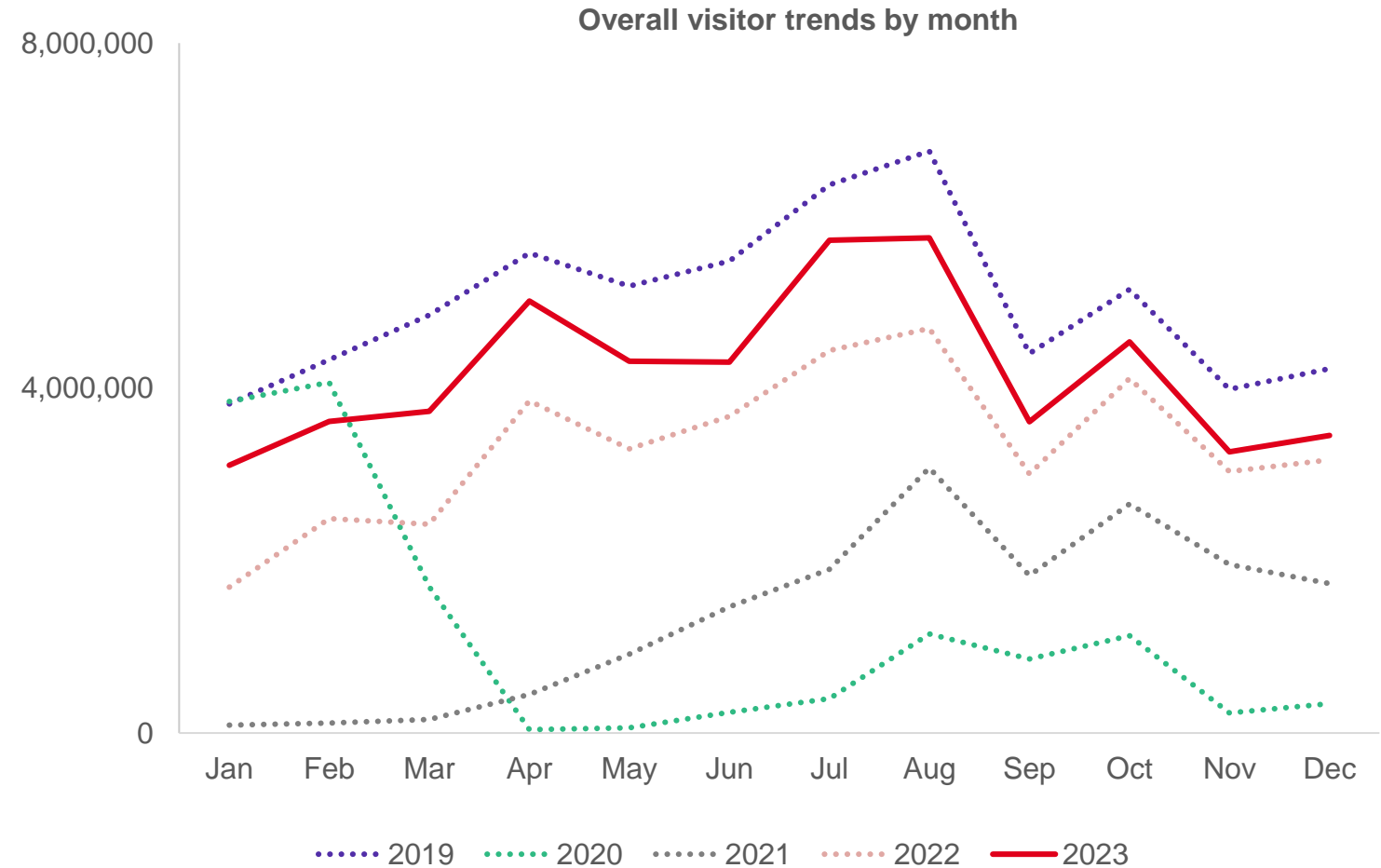**Overall visitor trends by month**
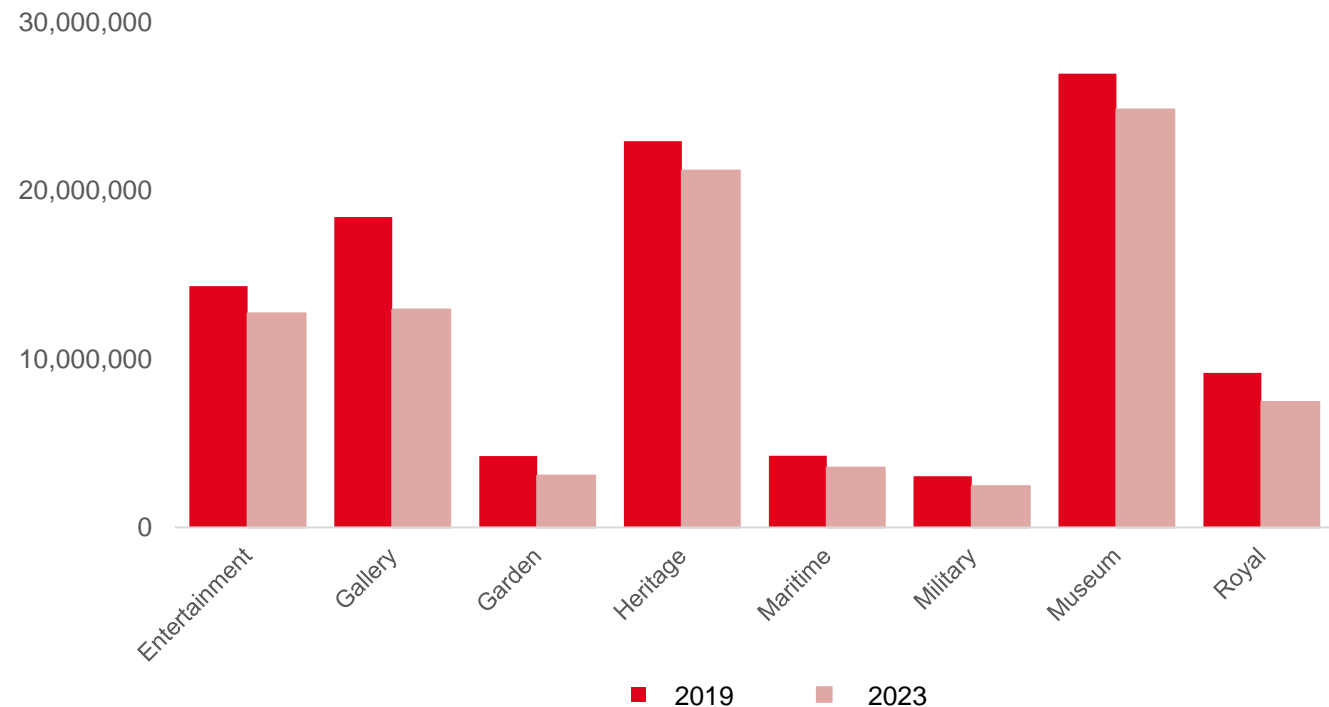

Legend: 2019, 2020, 2021, 2022, 2023

Source: London Attractions Monitor, London & Partners, based on the total visitor numbers of the 32 reporting attractions

Annual admissions by attraction type

Heritage and museums ended the year in the strongest position against 2019 comparison figures, just 8% below admissions seen pre-Pandemic. This is followed by entertainment venues, which were just 11% below 2019.

Slower growth in admissions was seen in data from Galleries and Gardens, when compared to 2019.
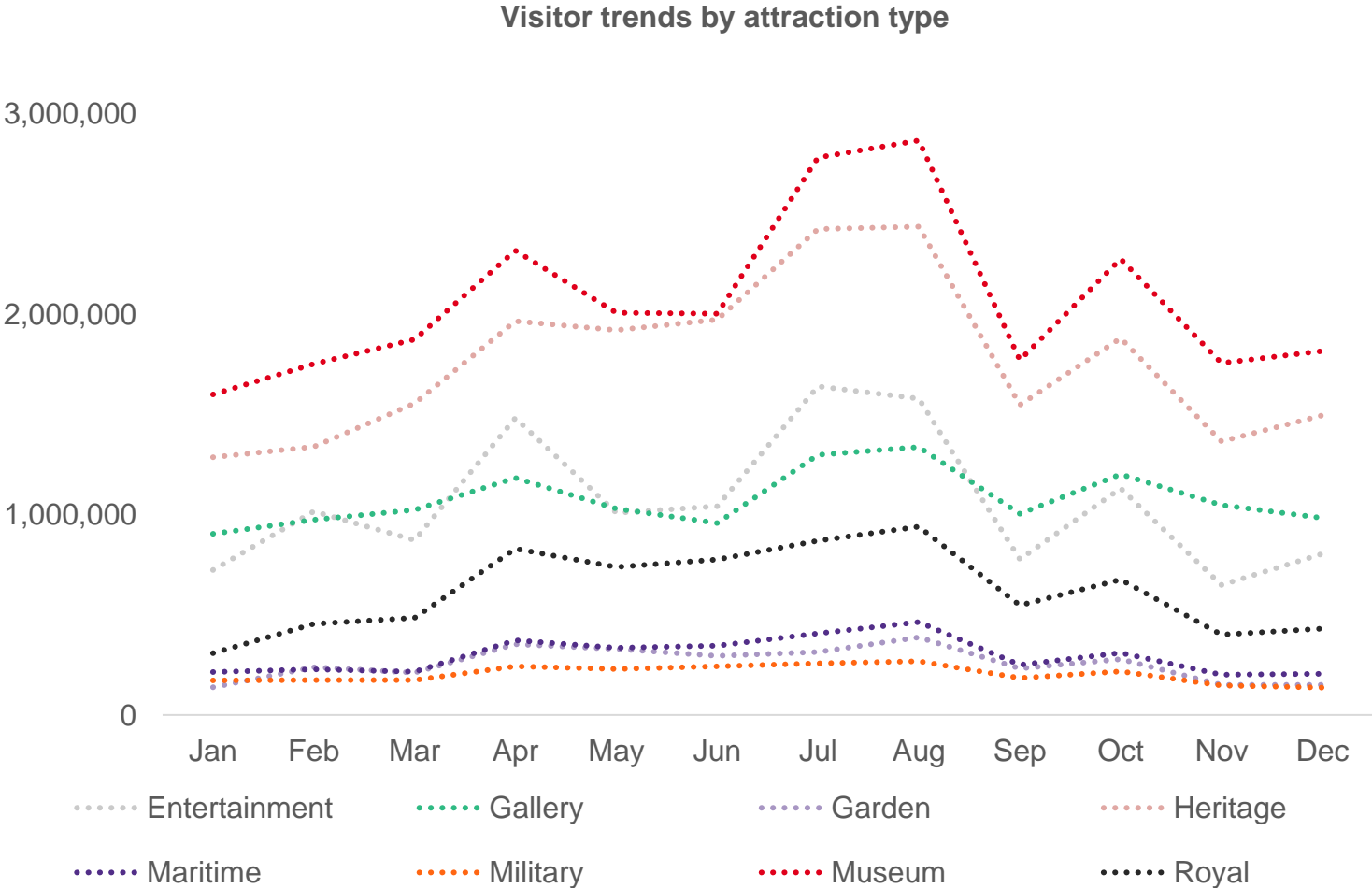

Visitor numbers by attraction category, 2019 vs 2023

30,000,000

20,000,000

10,000,000

0

Entertainment · Gallery · Garden · Heritage · Maritime · Military · Museum · Royal

■ 2019   ■ 2023

Source: London Attractions Monitor, London & Partners, based on the total visitor numbers of the 32 reporting attractions

Seasonality by attraction type

Between the months of July and August all attractions types receive a higher number of admissions.

Some attraction types will see multiple peak points e.g., Entertainment venues see higher admissions in April as well as October, coinciding perhaps with school holidays.

Some attraction types see more stability across the year e.g., military, gardens, and maritime.

Visitor trends by attraction type

Legend: Entertainment, Gallery, Garden, Heritage, Maritime, Military, Museum, Royal

Source: London Attractions Monitor, London & Partners, based on the total visitor numbers of the 32 reporting attractions
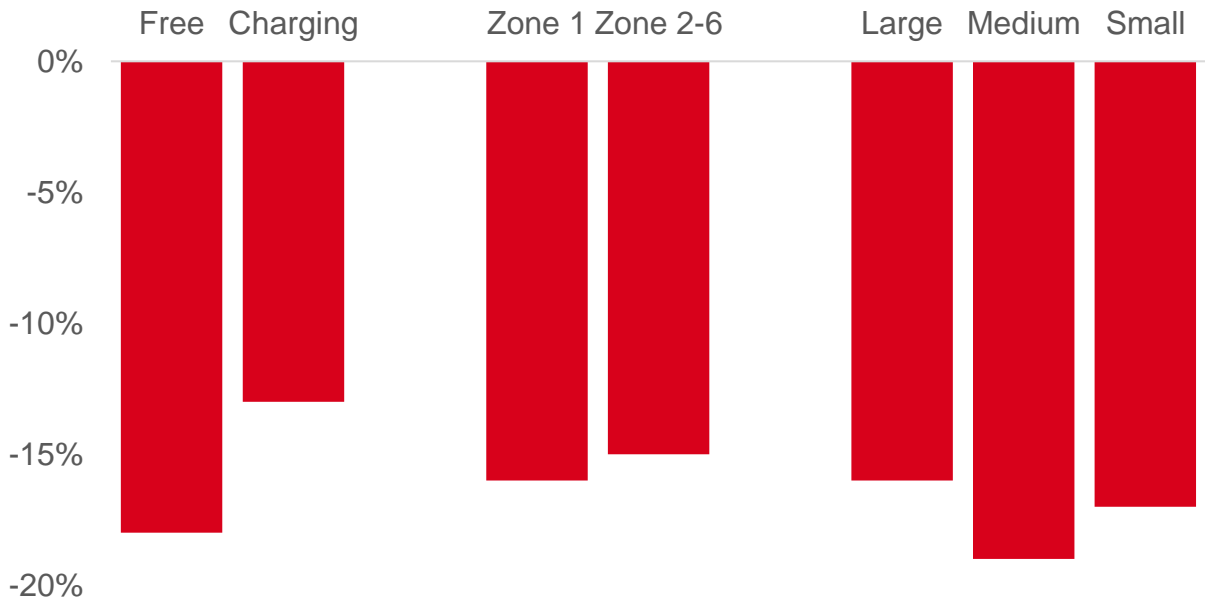
Annual performance by attraction categories

Charging attractions performed slightly better in 2023 than free attractions, as did outer London venues.
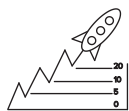
In terms of size, large attractions performed marginally better than small whilst medium venues lagged slightly behind large and small.

Attraction admissions as a percentage of 2019, by category

Summary Points

2019 was a particularly good year for London's attractions and so comparatively ending 2023 at 84% is a solid achievement and something to be celebrated.

Whilst we have seen growth from all types of attractions in 2023, museums and heritage venues ended the year comparatively closest to 2019 levels.

The UK faced a year of disrupted travel, as unions announced train strikes throughout the year. This may have deterred many from making plans or overturned pre-planned routes to get London.

Extreme weather conditions presented challenges for visitors. Protests happening across London also deterred people from using public transport or entering affected zones.

For some sites, 2023 saw periods of closure and refurbishment so whilst they may have ended the year on an overall high, for comparative reasons we are unable to compare their data to other years.

Whilst annual data shows that domestic day visits were up compared to domestic overnight visits, we know that people were being more selective with their activities due to the cost of living which may have impacted how many attractions they visited or the type.

Participating attractions

British Museum
Churchill War Rooms
Emirates Air Line
Guildhall Art Gallery
Hampton Court
HMS Belfast
Horniman
Imperial War Museum
Kew Gardens
London Dungeon
London Eye
Madame Tussauds
Monument
Museum of Docklands
Museum of Freemasonry
National Gallery
Natural History Museum
Old Royal Naval College

Royal Museums Greenwich
Science Museum
Sea Life London Aquarium
Shrek's Adventure
Sir John Soane's Museum
St Paul's Cathedral
Tate Britain
Tate Modern
Tower Bridge
Tower of London
Up at the O2
V&A Museum
Wallace Collection
ZSL London Zoo
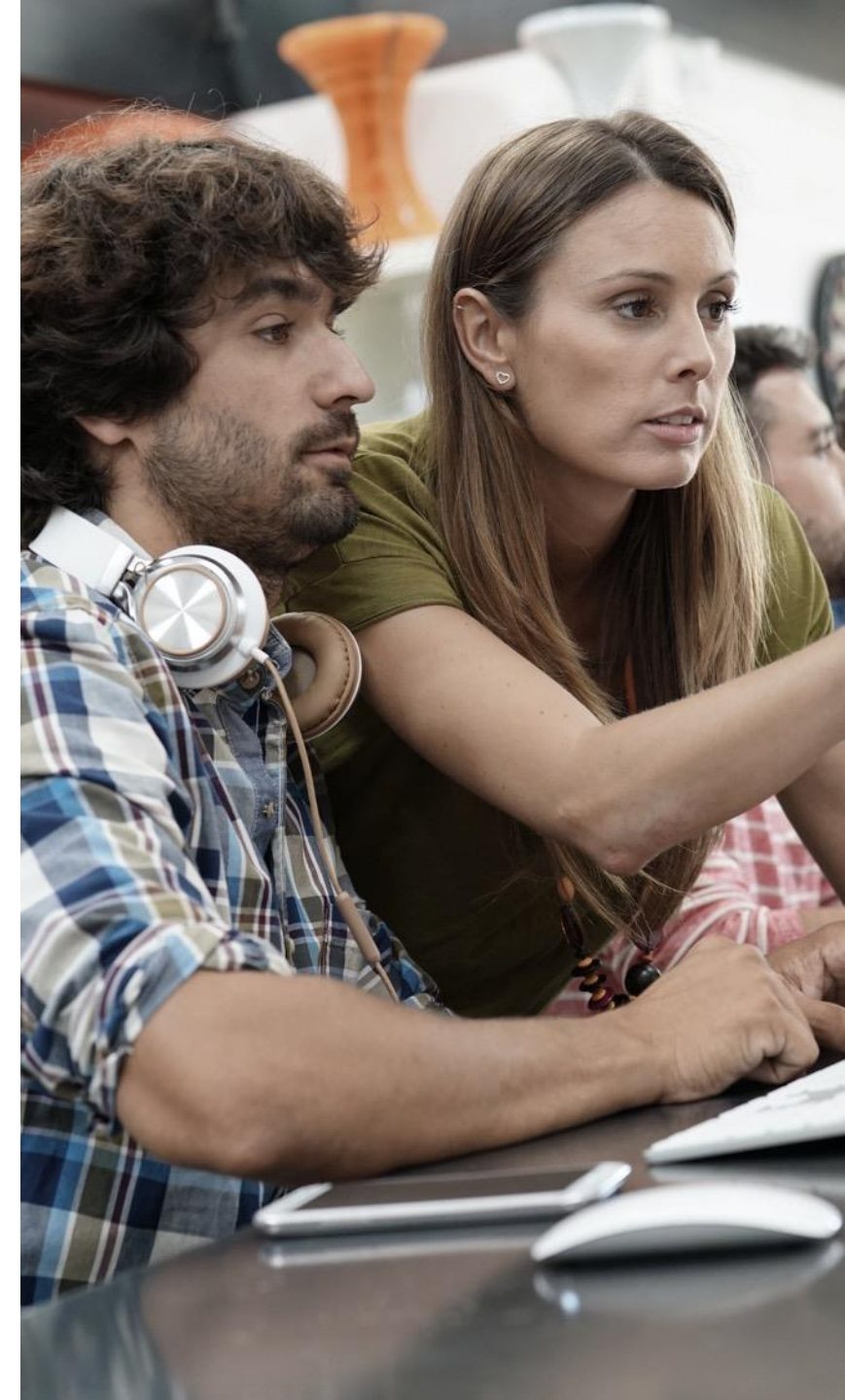
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CONTACT

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NB: quarterly analysis is dependent on the data we receive from the participating attractions per report

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