

Data Bank

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Image courtesy of Britain On View



The Results of the Household Cavalry Survey

I can still remember the day I read in the paper that the Household Cavalry guards were, for the first time ever, going to be allowed to move their eyes while at their post. I remember thinking, how nice for the guards. It must be awful to have to stare straight ahead for hours on end. And what a good idea from a security point of view. Now they can spot a threat to the Queen coming from either side, as well as from right in front. It was amazing that they didn't think of it sooner!

But having been there many times since then, I have to confess that I find it a little disconcerting as a tourist. Before, the Guard was so still and stone-faced that he didn't seem like a real person. Now you can see those little eyes swimming around and you can't help noticing that there is a living, breathing human being in there. It's a little disturbing.

Nevertheless, the Horse Guard remains an iconic part of the London visitor experience. He is continuously surrounded by mobs of tourists lining up to take his picture. With his new visual freedom, I sometimes wonder what he makes of them? Does he size them up?

Does he wonder who they are, where they come from, what they're doing, why they're here?

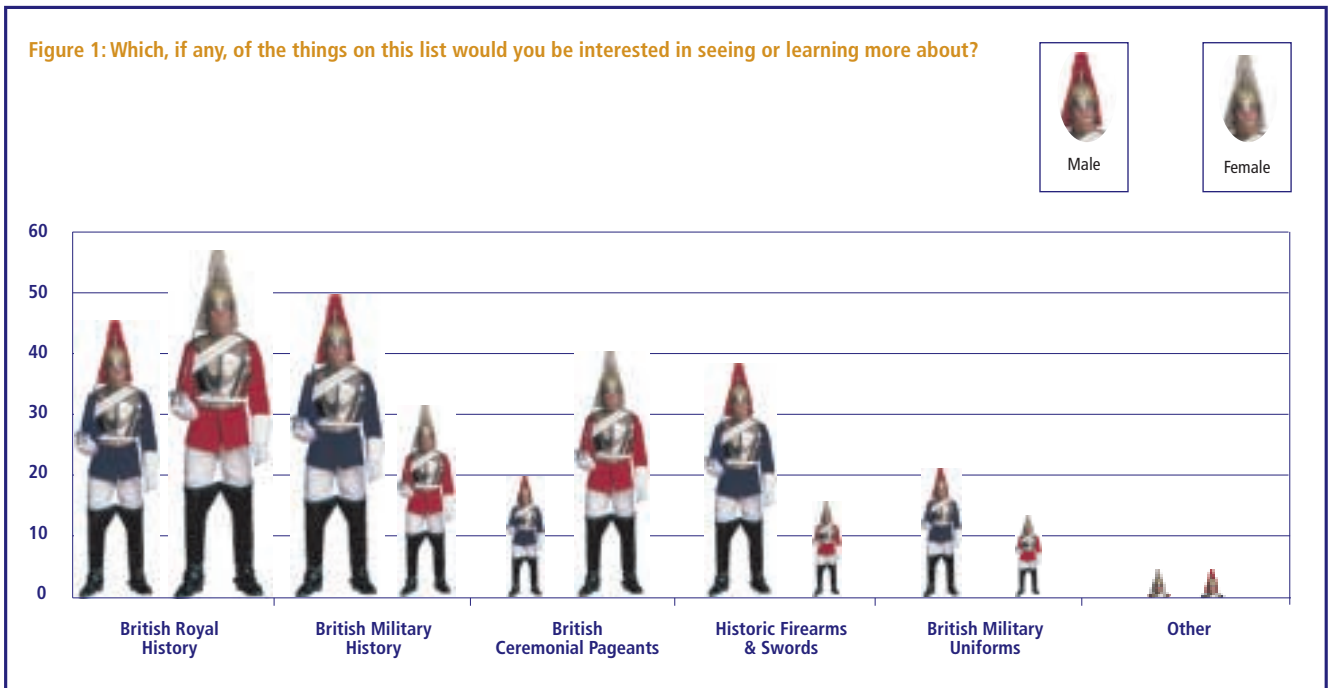
If he hasn't, you can be sure that a platoon's worth of marketing managers is desperate to know just that.

Consider the attractions that sit within one square mile: Buckingham Palace, the Queen's Gallery and Royal Mews, the National Gallery, the National Portrait Gallery, the Guards Museum, the ICA, the Cabinet War Rooms. Just over the river, the new Saatchi and Dali Galleries, the London Aquarium, the London Eye. Not to mention the public domain and historic monuments, such as Big Ben, Parliament, St James's Park, the Mall, Trafalgar Square and 10 Downing Street. It's the Golden Triangle of London tourist attractions, but there is no comprehensive and ongoing survey of visitors in the area.

The Household Cavalry to the rescue. In the fall of 2001, the regiment – in anticipation of opening a branch of its museum at Horse Guards – commissioned MORI to undertake an on-street survey of pedestrians on Whitehall, in Trafalgar Square and at Buckingham Palace. With their permission, we highlight below some of the main results.



Figure 1: Which, if any, of the things on this list would you be interested in seeing or learning more about?



Market Profile

Over 400 pedestrians in the three locations were surveyed. Of these, about 40 per cent were resident in the UK, including just 14 per cent from Greater London. They were considerably outnumbered by overseas visitors, including 15 per cent from North America. Of those domestic visitors coming from outside the South East, 60 per cent were on repeat visits. It is important to note that the survey period was immediately after 9/11 and with the effects of Foot & Mouth still prevalent. As result, it is likely that overseas visits were well below average (with North American tourists still jittery about flying) and domestic visits were above average (with tourism displaced from the countryside to the cities).

Information and Planning

Guidebooks are used by half of all visitors to obtain information on what to see and do in London, although the Internet (34 per cent) is also important, especially for overseas visitors. UK visitors get most

of their information via word of mouth, from newspapers and magazines, and through previous visits to the Capital.

Few people plan to visit this part of London in advance. More than half (60 per cent) decided to visit on the day or on the day before. The Internet is the most frequently used source of information (50 per cent) for those people who plan their visit more than two days in advance.

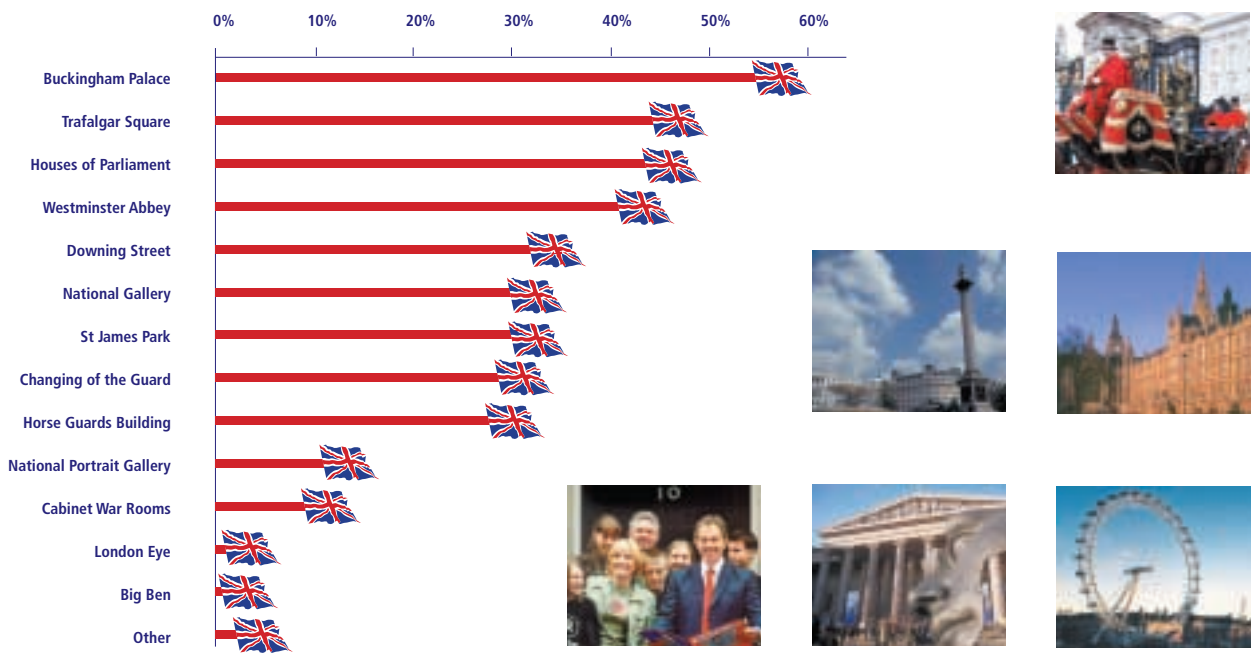


Interest in London Attractions

Of greatest interest to most people in the area (see Figure 2) is Buckingham Palace (61 per cent), followed by Trafalgar Square (50 per cent) and the Houses of Parliament (49 per cent). Both Buckingham Palace and the Changing of the Guard were especially popular with North American tourists (79 per cent and 46 per cent respectively).

Almost 20 per cent have already seen the Changing of the Guards in the past year. Overseas visitors from outside Europe seem more interested than others

Figure 2: What, if any, were the particular things that you wanted to see in this part of London?



in British ceremonies, with one-third having watched the Changing of the Guards ceremony at Buckingham Palace compared to only 9 per cent of UK visitors.

Areas of Interest

There is a marked discrepancy between those people who are predominantly interested in royal history and pageantry and those interested in the military aspects of the product.

Half of the sample wanted to learn more about British Royal history, with 56 per cent of women interested in this dimension, compared to 45 per cent of men (see Figure 1). By contrast, British military history was considerably more popular amongst men (50 per cent of whom wanted to see or learn more about this aspect) than women (28 per cent). This trend is reinforced by the fact that men are far more likely to be interested in the associated 'hardware' – guns, swords, uniforms, medals – than women. Women, on the other hand, are far more interested in the pomp and ceremony (37 per cent of women versus 20 per cent of men).

When broken down by nationality, UK residents appear equally interested in the Royal and military angles (about 44 per cent each), whereas North Americans are far more interested in Royal history (67 per cent) than military history (47 per cent).

There is a marked age discrepancy as well. People aged 55+ are far more likely to be interested in Royal history (53 per cent) and pageantry (41 per cent) than any of the other areas. By

contrast, people aged 16-24 are more likely to be interested in military history (51 per cent) and less likely to have an interest in the ceremonial aspects of the monarchy (21 per cent).

All of this has some key implications for attractions in the area and, more generally, for UK attractions with a royal or military bent. Critically, all of the demographics that have a higher propensity to visit attractions – tourists, empty nesters, families with children (where the mother's opinion tends to sway more visits than the father's) – show a clear inclination towards the more ceremonial aspects of British history rather than the military ones. Military museums and historic castles especially need to avoid the common 'boys' toys' perception. In short, they should play up the pageantry and downplay the warfare in all of their marketing and promotion.

Fortunately, this is precisely the approach being adopted by the Household Cavalry for their new museum at Horse Guards. They are in an even better position than most. In addition to a great location and an iconic image of London

standing guard at the gate, they have another key attraction in their favour. Nearly all visitors have a soft spot for horses. A full 60 per cent of those surveyed were primarily interested in the horses, compared to 30 per cent who were interested in uniforms and medals and only 19 per cent interested in firearms and swords.

