



Association of Leading
Visitor Attractions



Bernard Donoghue,
Director, ALVA.

2nd November 2022

Mayor of London's Cultural Tourism Ambassador

MAYOR OF LONDON

Co-Chair, London Tourism Recovery Board



Chair, Bristol Old Vic Theatre.

**BRISTOL
OLD VIC**

Chair, National Trust London and South East Advisory Board



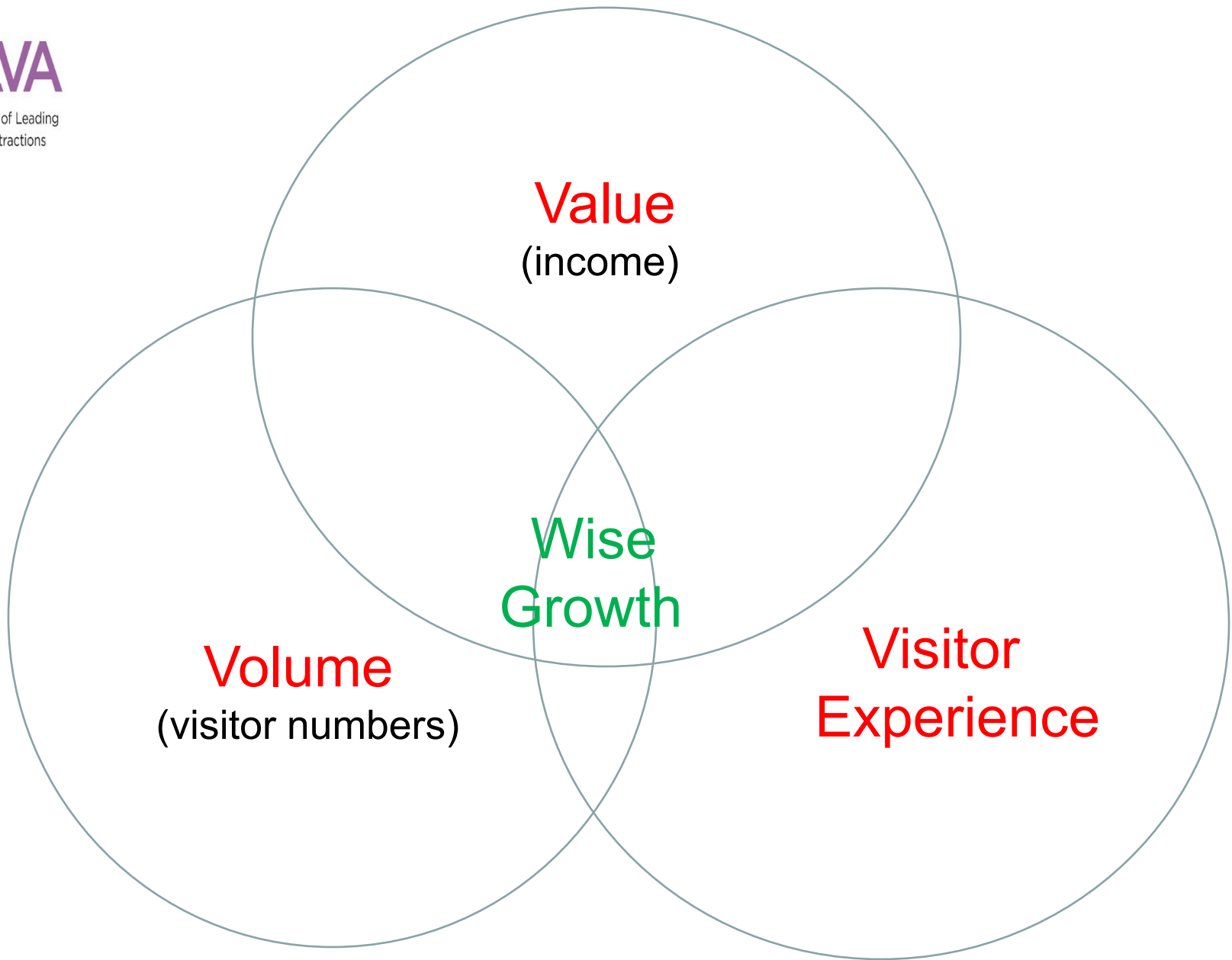
Chair, People's History Museum





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- 10 things we learned over the last 2 years.
- What visitors are doing now.
- Reopening, renewal and repair.
- Prospects for domestic and inbound markets.



Visitor Attraction Trilemma – balancing the three objectives in order to achieve wise, sustainable growth; this will hold true in the future.

- UK attractions which have successfully and sustainably increased their visitor numbers over the last 10 years share these behavioural characteristics:
 - Provocative
 - Disruptive
 - Risk-taking
 - Brand-stretching
 - Foster creative partnership with unusual suspects
 - Audience-developing

1. Greater political appreciation of the size, value and importance of tourism and the cultural sector to our health, lives and economies. CRF was won with data. But we must continue to lobby. Data, including spend, is key.



2. An inspiring explosion of sharing and collaboration within the sector and beyond, including internationally.



3. The absolute importance of Front of House staff.

To welcome, to reassure, to explain, to
manage and to protect.

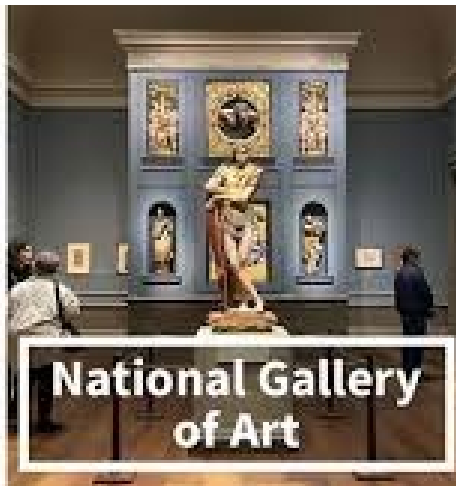


Biggest difference between a 4 star Tripadvisor review (very good) and a 5 star review (excellent) is that a 5 star review is 4 times more likely to mention a staff member's name.



4. The importance of digital as a tool to complement, to entice, excite, entertain and invite, but not to replace the visitor experience.

People have been encouraged to cross the digital threshold and in doing so have more confidence to cross the physical threshold, but visible diversity in the museums is the key.



5. An acceptance that what we did in the past wasn't perfect, and we should not try and replicate it. We must recover better.

- Be open to innovation and risk-taking, including co-curation and community programming
- Try new things, be open to new partnerships with unusual partners especially performance companies and artists

6. This is an opportunity to open our doors to people who are different from those we closed them to in 2020.



7. People yearned to return to their favourite attractions. They are part of their lives.

We need to reciprocate that love and loyalty.

- Significant growth in memberships during lockdown
- 82% average membership retention rate amongst ALVA members in 2020, 86% in 2021.
- Family memberships big growth in 2021 and early 2022 as families chose value for money daytrips because of inflationary pressures (National Trust, English Heritage, Historic Royal Palaces).
- Significant increase in secondary spend in Retail and especially in F&B until August

9. Sanitise your site, not the visitor experience.



10. You create the backdrop for people's happiest memories.



- Attractions are being recognised, and used, as social spaces where you can breathe, heal, and reunite with friends and family. Deliberate memory-making.
- On average 20% of 2019 audiences of performance spaces (especially for classical music / orchestras) have not yet returned, some never will, and some are disinclined to return. Forward bookings have reduced considerably, at some places by up to 50%. Very short lead times for bookings now, days rather than weeks.
- But many indoor venues are still operating at less than 80% of 2019 visitor numbers.



- Outdoor attractions were the first to reopen and recover (now up to 90% + of pre-pandemic levels), helped by initiatives like Winter Lights etc. Outdoor attractions, and indoor attractions with outdoor spaces for programming, are recovering most quickly.
- Christmas events are selling well – fits with the need to ‘purchase memories.’

UK international recovery.

- Overseas visitors won't be back in any real numbers until 2023 and not fully back to pre-pandemic levels until 2024 / 2025. USA, French, Germans, Irish, Dutch, Italians have been the quickest to return.
- International visitors to UK currently -28% against same period in 2019 (last 3 weeks). Spend -9%.
- Visitors from North America currently -5% against 2019.
- Chinese visitors currently -99% against 2019.
- Heritage and culture still No 1 reason for leisure visitors to visit the UK. The last 2 months and the next 7 months will remind people of the UK as a 'must visit' destination.



- Weak £ means expensive overseas holidays for UK population, and the UK more attractive for inbound visitors, but the 'cost of living' crisis means that the domestic market is more cautious about spending commitments.
- UK visitor attraction-going population are making very tactical leisure spending decisions, already sacrificing Netflix and Disney subscriptions, having fewer meals delivered, cutting down on date nights. (Though Netflix now resurging).
- Only in the last month have day trips started to be sacrificed.

ALVA / Decision House research, October 2022

- This slowing of the recovery is being driven by the increasing financial concerns of audiences, especially families and those on lower incomes.
- 24% of the public now spontaneously mention financial concerns when asked how they feel about visiting attractions compared with 16% back in June.
- The positive impact on attraction visiting generated by Government energy bill support is negated by those who feel that the absolute increases in their bills will still prevent them from visiting (as frequently) .

ALVA / Decision House research, October 2022

- For some, there appears to be an assumption that the cost of visiting attractions will rise in line with inflation - now 10.1%
- Perhaps a need for communications here to reassure and promoting a 'value' message?
- Many are simply cutting down or removing the relative 'luxury' of visiting attractions, although there is strong evidence that free attractions will benefit at the expense of paid attractions, especially among the 50% of the public who are now feeling worse off than a year ago.

Big Questions.

- What did we do, pre-pandemic which, looking back, was bureaucratic, did not work, was inefficient, was overly risk-averse and was too inward-looking?
- Which of these things can we dump now that we're in a different place? Which do we want to keep?
- What have the last 2 years taught us about our appetite for risk and to just 'try' things? Can we maintain that flexibility and responsiveness as we move out of crisis management?



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- Our visitors, supporters and members showed us that they loved us, how do we reciprocate that?
- Let's be critically honest about who our visitors are, who doesn't visit us, why they don't visit, and how we must be better at explicitly inviting them and making them welcome?



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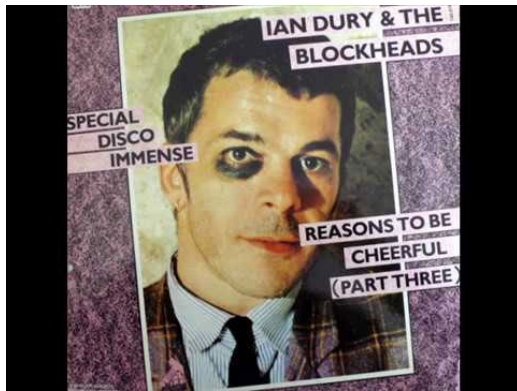
- How do we better monetise what we already have?
- Are we providing memory-making experiences? That's what the public are telling us they are prioritising in their leisure hours and in their leisure spend - special time with special people.



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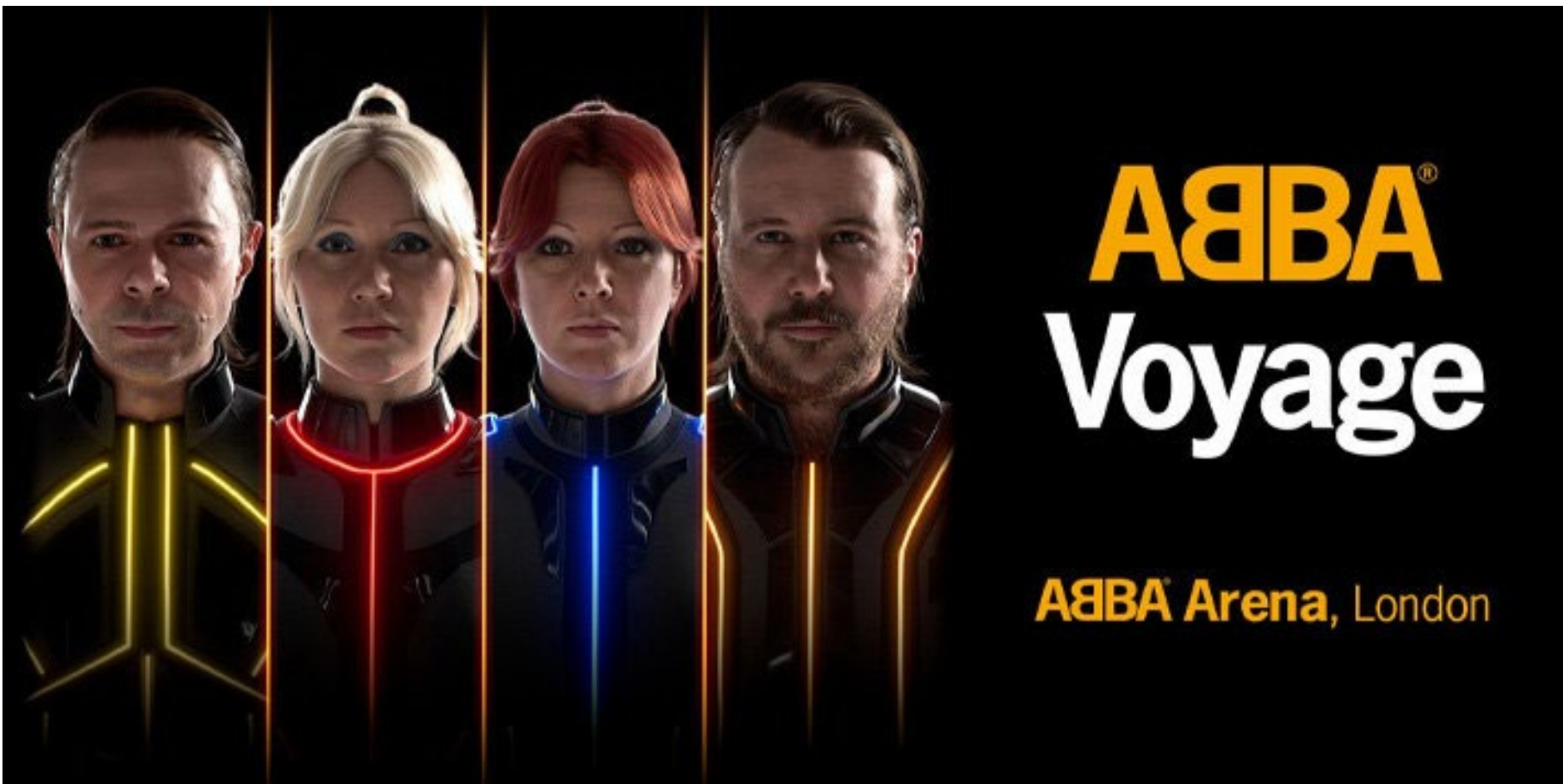
- How are we communicating and engaging with our visitors and audiences on site, online and in the community in authentic ways?
- Are we conversing with them or broadcasting to them?
- How are we reducing our environmental footprint and impact and how do we help our visitors do that too?

- How do we listen more attentively to our staff? How do we benefit from their creativity, wisdom, savviness, appetite for risk, passion, diverse experiences and perspectives?
- How do we recognise and reward them for being the principal reasons that our visitors love their visit and why they return?



Reasons to be cheerful

- Most expensive theatre seats are still selling best – Elf, Frozen, Sister Act all selling very well / sold out.
- People are still paying for high quality and high value experiences (St James's Palace tour sold in 10 minutes).
- Exclusive and limited experiences are selling well.
- People still want memorable, special experiences, with special people, in special places.



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ABBA[®] Arena, London





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