

ALVA

Association of Leading
Visitor Attractions



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CEO, ALVA

14th November 2024

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Well Done Nellie Bly.



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For many ALVA members last year and this year have been financially challenging as they seek to build up their reserves, repair their balance sheets, invest in new products or experiences, maintain their membership base and recruit new members, and pay off COVID loans whilst, at the same time, consumers are spending less and making fewer visits because of the cost-of-living crisis.

Business update, November 2024.

- On average ALVA members are currently hosting 92% of their 2019 visitor numbers (up from 83% in September 2023).
- People are still seeking deliberate memory-making experiences.
- Programming is key.

Business update November 2024.

- For the first five months of this year **annual growth was 8.3%.**
- Taking May, June, July, August and September together – **average 6% fall in visitor numbers this Summer compared to 2023.**
- For very many sites **2024 continues to deliver admissions that are only marginally ahead of last year.**



Business update, November 2024.

- There was a further strengthening in the value of sterling in August and September against both the US dollar and Euro, meaning it was marginally more expensive for overseas visitors to purchase goods and services in the UK than was the case a year ago.



Business update, November 2024.

Principal causes:

- Cost of living - people going to fewer properties (even when they are members) and spending less in retail and F&B.
- Members of attractions visiting places 15% less frequently than pre-pandemic, on average.



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Business update, November 2024.

- Greater outbound tourism numbers this year compared to the last 4 years because of a year's worth of poor weather - we already predicted that this year's staycation would be hit because we saw record outbound bookings made after the very wet Summer 2023, Winter and Easter 2024.
- Impact of Euros and Olympics: attending the Euros reduced UK leisure spending and the Olympics saw significant stay-at-home UK viewership.

Business update, November 2024.



Free attractions had a better start to the year, with performance showing a 12% increase in the first 6 months of 2024 vs the same period in 2023.

- 82% average membership retention rate amongst ALVA members in 2019. Now down to 79%.
- But families are not using their memberships as frequently as pre-pandemic (15% less). Visits are no longer viewed as a 'free day out'. Visitors are also factoring-in travel costs etc. Clear evidence that, though spending on retail and F&B, families have a 'day out budget'.
- Attractions need to look at providing more affordable experiences for families on a budget.

Post-lockdown reflections.

- Take more (considered) risks with reserves; invest in capital projects and infrastructure rather than shore-up reserve accounts.
- Invest in programming, and partner with 'unusual suspects' to tell your stories.
- Invest in greater commerciality and entrepreneurship in the light of diminishing Government investment.

Post-lockdown reflections.

- Existential questions.
 - Who visits?
 - Who doesn't?
 - Why don't they?
 - What are we going to do about it?
- Relevance to audiences and our communities.
- Social and political mandate for existing.

Reasons to be cheerful.

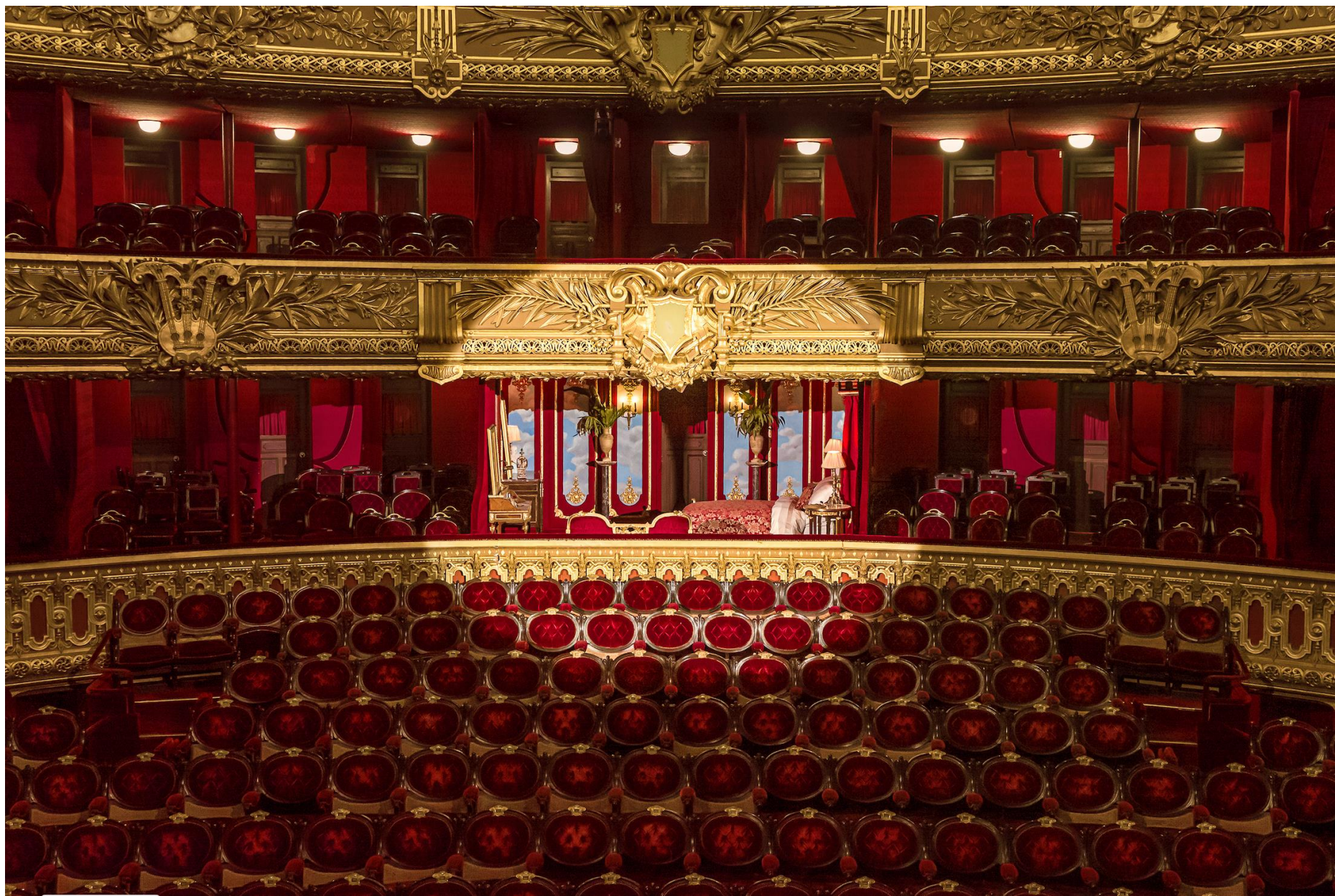
- Most expensive theatre seats are still selling most quickly.
- Exclusive and limited experiences, including temporary exhibitions, are selling very well.
- People still want **memorable special experiences, with special people, in special places.**



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.









Palais Garnier, home of The Phantom of the Opera, is now on Airbnb

By [Airbnb](#) · February 12, 2023 · [Stays](#)

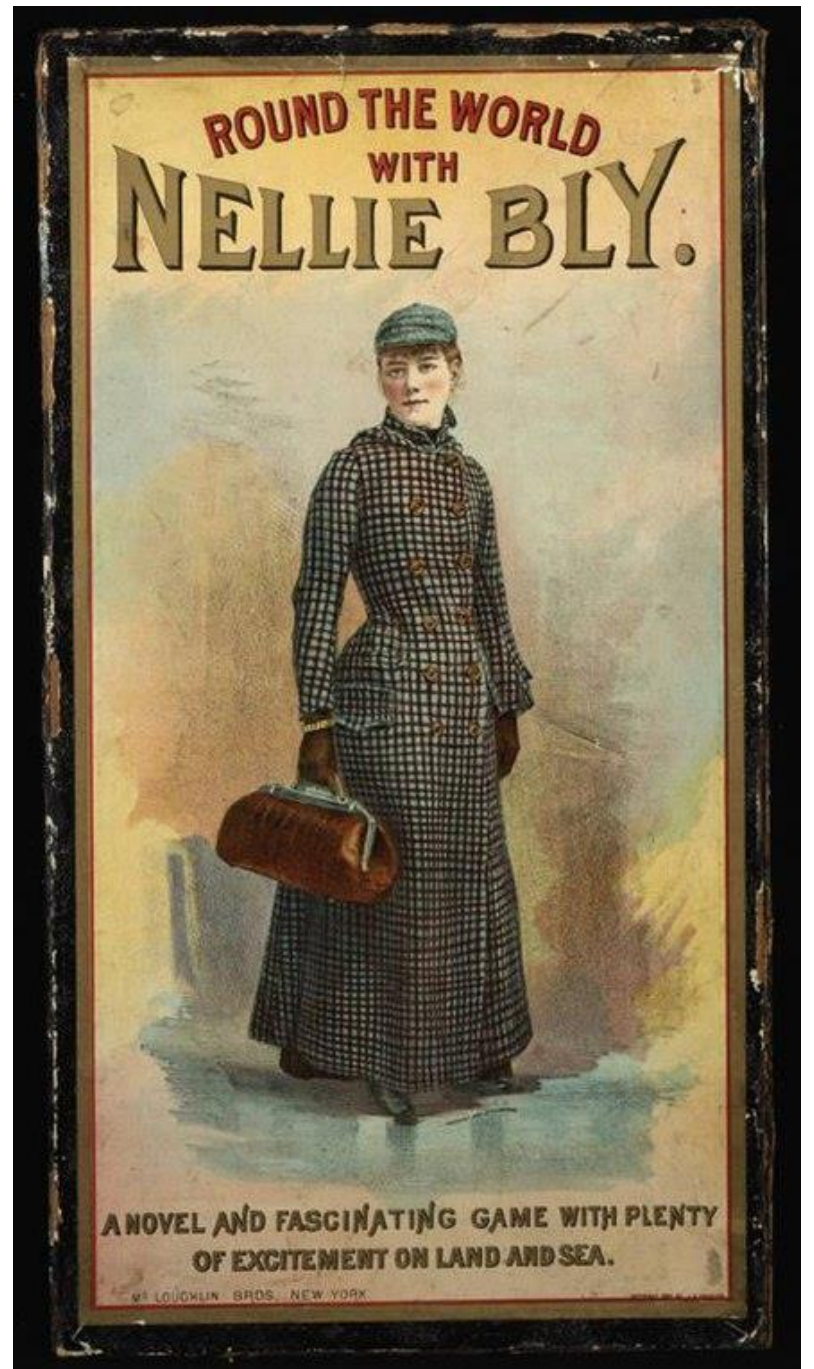


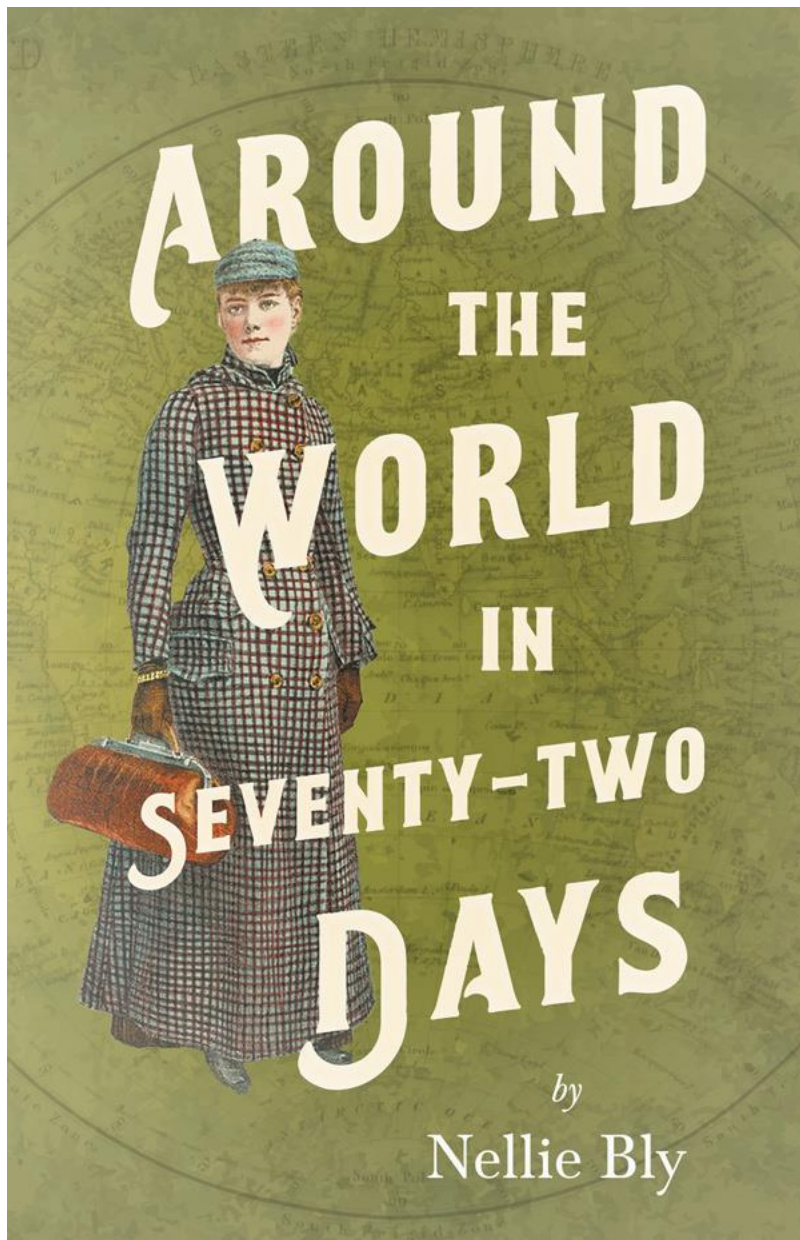
Key Takeaways

- For the very first time, guests can spend the night in the Parisian opera house that inspired the record-breaking musical, The Phantom of the Opera
- To celebrate the global success of The Phantom of the Opera, the Palais Garnier will open its doors for a majestic stay in the lavishly transformed Box of Honour

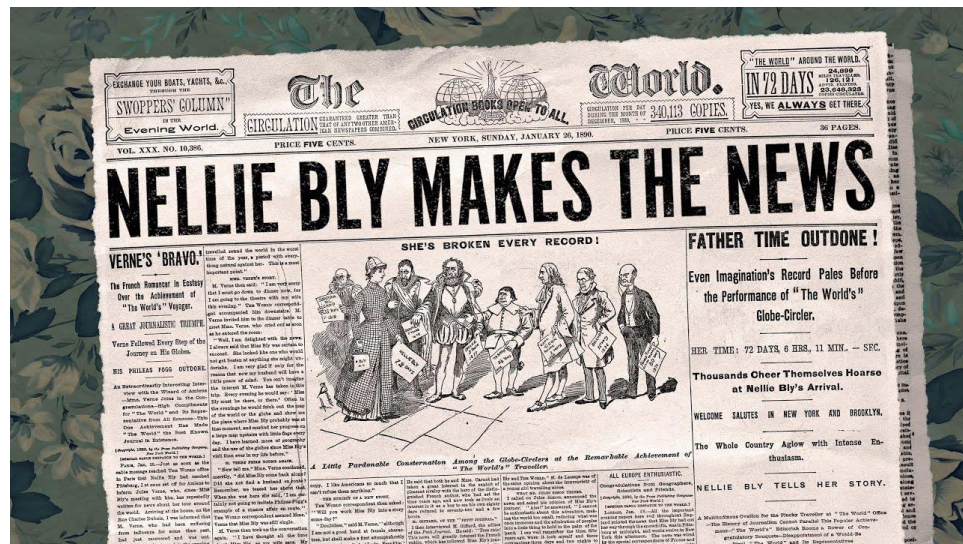
How to book:

Phans may request to book the overnight stay on Wednesday, March 1, 2023 from 6:00 PM CET at airbnb.com/opera. The stay will take place on Sunday, July 16, 2023. This one night stay will cost **37 euros***, in honour of the Box of Honour's number. Let the dream begin.





Source: Wikimedia Commons





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“I thought I could, so I did.”

- @bernarddonoghue
- @alva_uk