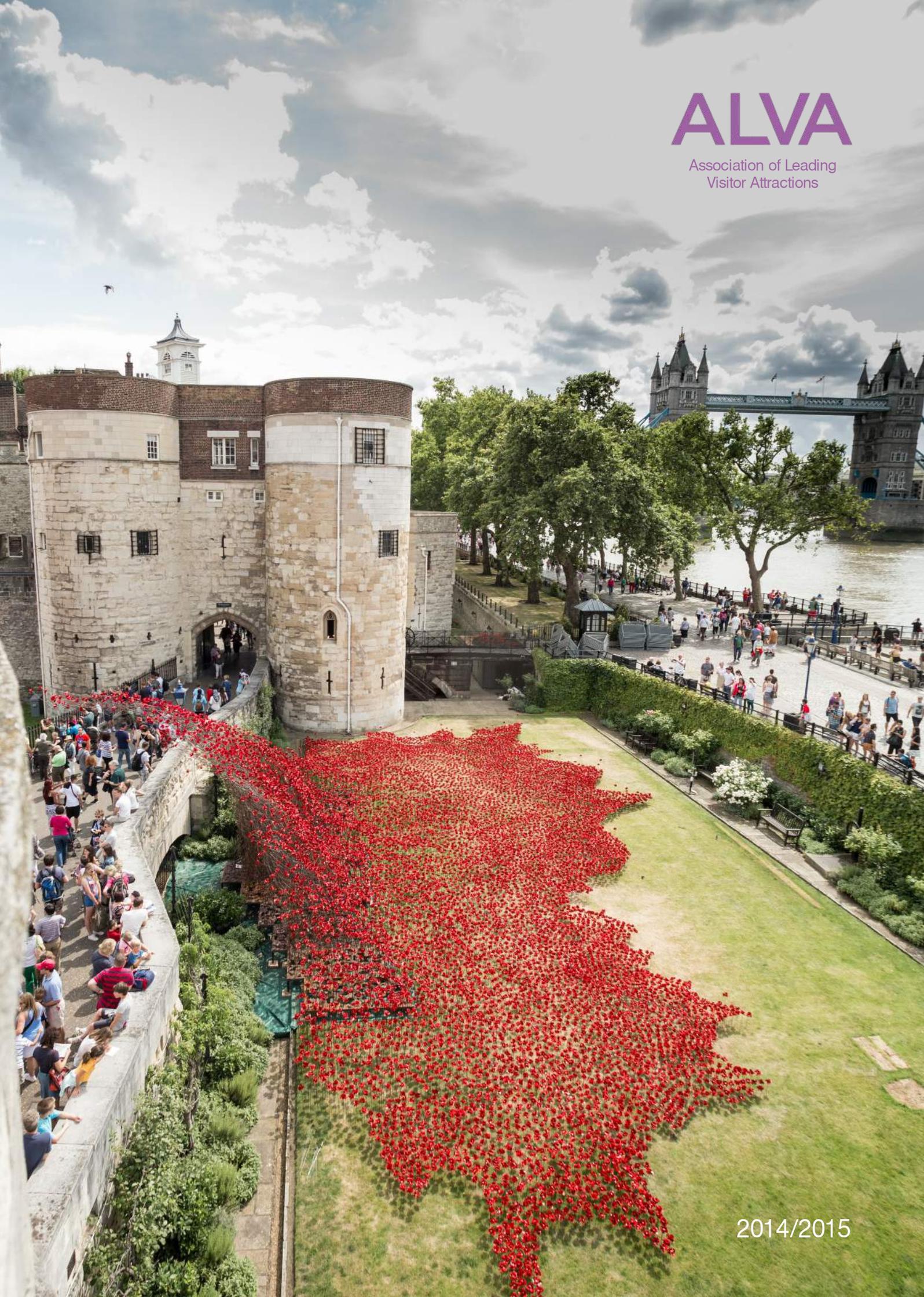


ALVA

Association of Leading
Visitor Attractions



2014/2015



RHS Garden Harlow Carr, North Yorkshire
Front cover: Tower of London and Tower Bridge

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World Museum, Liverpool



National Railway Museum, York

About ALVA

The Association of Leading Visitor Attractions' members are the UK's most popular, iconic and important museums, galleries, palaces, castles, cathedrals, zoos, historic houses, heritage sites, gardens and leisure attractions.

They comprise over 2100 tourist sites, hosting over 110 million domestic and overseas visitors each year - around 28% of the visits made annually in the UK.

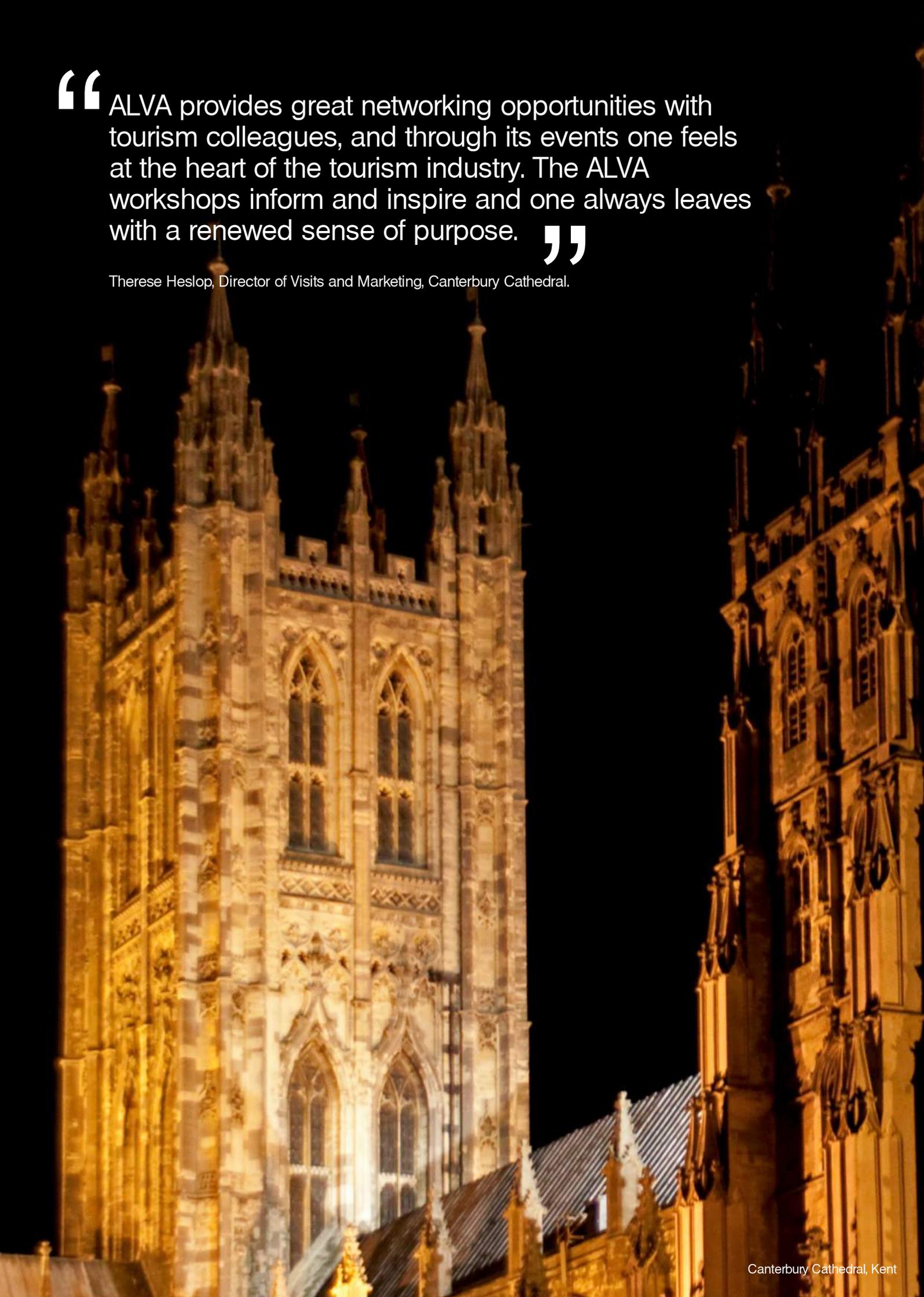
We represent our members to Government, media and business, and lobby for much-needed support for the sector. We provide training, benchmarking and advocacy initiatives and assist our members to continually improve the visitor experience.



Somerset House, London

“ALVA provides great networking opportunities with tourism colleagues, and through its events one feels at the heart of the tourism industry. The ALVA workshops inform and inspire and one always leaves with a renewed sense of purpose.”

Therese Heslop, Director of Visits and Marketing, Canterbury Cathedral.



Lord Lee of Trafford DL

Chairman of **ALVA**



Welcome to The Association of Leading Visitor Attractions. As Chairman, it is my great pleasure to introduce you to the work that we do for the UK tourism industry and to the people who work so hard to make sure its voice is heard at the highest levels.

As we approach the quarter century mark, ALVA has grown to become the high profile, influential and inclusive organisation that was envisaged at our inception in 1990. ALVA membership now numbers 57 and includes the leading visitor attractions in the UK, spanning from neolithic Stonehenge to our latest member The View from the Shard.

I should like to thank all our Board members, past and present for their work, advocacy and advice and to welcome our most recent members Tim Husbands MBE, Sarah Roots, Loyd Grossman OBE and Stephen Duncan. I know that their experience and passion will prove invaluable to ALVA's continuing work.

I would especially like to thank our excellent, hard-working staff, led by Bernard Donoghue who joined us as Director in September 2011. Building on the excellent and strong foundations created by our previous director Robin Broke, ALVA has grown dramatically, broadened and thrived under Bernard's leadership. Our media and political profile in particular has significantly increased as ALVA has taken a leading advocacy role in persuading all parties, all politicians and policy makers to "Take Tourism Seriously" in the run-up to the General Election and when in government.



HRH The Duke of York KG

President of **ALVA**



His Royal Highness undertakes a number of engagements every year in support of ALVA; from visiting and meeting members, attending events and conferences, to hosting meetings at Buckingham Palace and initiating discussions on issues relevant to ALVA members and the wider tourism, heritage and attractions economy.

ALVA Board



Lord Lee of Trafford DL is the Chairman of The Association of Leading Visitor Attractions, a role he has held since 1990. In March 2012 he was elected as Chairman of the All-Party Parliamentary Group on Tourism in The Houses of Parliament.



Pim Baxter is the Director of Communications and Development and Deputy Director of The National Portrait Gallery. In 2010 she was named as one of the Cultural Leadership Programme 50 Women to Watch within the creative and cultural sector.



Bernard Donoghue has been the Director of ALVA since September 2011 following a career in advocacy, communications and lobbying, latterly at a senior level in the tourism and heritage sector.



Stephen Duncan is the Director of Commercial and Tourism for Historic Scotland. He has also served as a Director for the Association of Scottish Visitor Attractions.



Loyd Grossman OBE FSA is Chairman of The Churches Conservation Trust - a member of ALVA - and Chairman of The Heritage Alliance, of which ALVA is a member and has a board position.



The Hon. Simon Howard is the owner of Castle Howard, Yorkshire's finest house and estate, and a member of the Treasure Houses of England. Castle Howard has been home to the Howard family for more than 300 years.



Tim Husbands MBE is the CEO of Titanic Belfast, the world's largest Titanic visitor experience. He was recently honoured by the Queen for services to Economic Development and Tourism.



John Meardon is the Receiver General of Canterbury Cathedral and the senior lay member of the Cathedral staff. He joined the Cathedral in 1998 after 34 years of service with The Royal Marines.



Sarah Roots is the Vice President of Warner Bros. Studio Tour London - The Making of Harry Potter. She joined the ALVA board in July 2014.



Baroness Patience Wheatcroft was Editor in Chief, Europe, of the Wall Street Journal until February 2011. In December 2010 she was created a life peer as Baroness Wheatcroft of Blackheath. She is a Trustee of the British Museum and was appointed Deputy Chairman in 2013.



Sue Wilkinson is Director of Support Development at The National Trust and is also a Trustee of The Old Royal Naval College, Greenwich, which is an ALVA member.

Bernard Donoghue

Director of **ALVA**



Why is ALVA important?

ALVA brings together the most important iconic and popular visitor attractions across the UK. Their collective voice is crucial in conveying to and impressing upon government the contribution and concerns of the attractions sector. Government really needs to hear that voice - not only of the commercial but also of the public sector - because we are one of the main reasons that overseas visitors say that they come to the UK, and collectively, our members host more than one quarter of all day visits made in the UK. Therefore the things that affect the attractions sector affect the whole of the tourism economy too. That's why ALVA is, and always will be needed, and why governments across the UK solicit our views.

“The things that affect the attractions sector affect the whole of the tourism economy.”

What changes has ALVA undergone in the last two years?

We've put much more emphasis on providing opportunities for our members to network, to share information with each other and to learn from trends and insights provided by people from within the attractions sector - but also outside of the tourism sector too. We now provide five times more events and initiatives for our members than we did just three years ago. Most importantly we've widened our scope to include people beyond our traditional audience of marketing and communications. So we're now providing opportunities for people who work in HR, fundraising, finance, education and membership to meet together under the auspices of ALVA.

What challenges do ALVA members face in the coming years?

Firstly, increasing cuts from public funds to the publicly funded museums and galleries, alongside an unwillingness from central or local government to allow museums and galleries in particular to become much more entrepreneurial and commercial in their own right - thus offsetting some of the cuts that are being visited upon them.

Secondly, the UK - no matter how attractive it is in the world tourism market - still needs to compete for every visitor and every pound that they spend. Therefore we need to understand why people want to come to the UK and make the UK more competitive, especially in relation to the tax burden and the ease of obtaining visas. We must also make ourselves more attractive to the domestic consumer.

Thirdly, we have a leadership responsibility within the broader tourism sector to ensure that government better supports the tourism industry, particularly given our job creation potential and ability to bring in new investment from around the world.

Lastly, the challenge for all ALVA members is to improve the visitor experience they provide, so guests have a great time, at great value and choose to come again.



Corn Du, Brecon Beacons, Wales



Kew Gardens, London

What ALVA achievements are you most proud of?

I'm delighted that we have more members sharing more information, with more people in each member organisation getting more involved in ALVA - so it feels like we're able to share more of what we do with a greater audience. We are an increasingly collaborative organisation, working hard and supporting excellent attractions who are outside our membership too. We have an obligation to support them when we can; an example is our great partnership with the Association of Independent Museums, where they and we successfully applied for Arts Council funding to extend our benchmarking work to smaller visitor attractions not included in membership of ALVA. This has helped to raise the standards of the visitor experience and quality throughout the sector.

I'm really delighted our direction of travel has been supported and encouraged by the Board; we have a great team of Board members who are incredibly supportive and helpful, between meetings as well as at them. I'm thrilled that our achievements have also been recognised by our new commercial partners and sponsors who are not just passively involved with ALVA but are real enthusiasts for everything we do and increasingly come along to as many of our events as they can.

It's immensely rewarding that so many of our members see and appreciate the diversity of what we do - the average evaluation rate for all of our activities by those attending our events is 97% excellent or very good. I believe in evaluation and that is truly a great testament to what we and our members can achieve together.

“

Continuum has been an active member of ALVA for over 24 years. The membership has allowed our team to share and learn amongst our peer group, to expand knowledge and to develop skills to grow our business. ALVA continues to raise the profile of our industry on our behalf in ways we are not able to. In particular, the recent developments of seminars, workshops and wider events have broadened the value of shared learning across the ALVA family.

”

Juliana Delaney, Managing Director, Continuum Group.



ALVA Advocacy

The main focus of ALVA's work is representing our members and their views to politicians, policymakers, the broader tourism industry, business and the media. Having been one of the founders of the Tourism Alliance in 2001 we continue to ensure that Ministers across the Governments of the UK, Scotland, Wales and Northern Ireland fully appreciate the economic significance of tourism, its ability to create jobs at all skill levels, sustain communities and attract inward investment.



Tourism is the UK's fifth largest export industry and research undertaken into overseas visitors' motivations show that our attractions, history, heritage and culture are the principal reasons for most decisions to visit the UK.

In the last year we have met with and briefed Ministers and other policy-makers on a variety of issues, including:

- Meeting with the Prime Minister, the Rt Hon. David Cameron MP to discuss visas and taxes
- Meeting with the Scottish Deputy First Minister, Nicola Sturgeon MSP to discuss culture and heritage

Labour Deputy Leader, the Rt Hon. Harriet Harman QC MP attended our Marketing Seminar.

Regular briefings and meetings with Parliamentarians on UK tourism structures, our international competitiveness, the tax burden on businesses and visitors, Gift Aid changes, visas and other issues.

ALVA Benchmarking

ALVA has long been a pioneer of benchmarking in tourism and we now offer specific initiatives that together set a new gold standard for the industry.

1. Benchmarking and the Visitor Experience

BDRC Continental manages and delivers our visitor experience benchmarking scheme which evaluates visitors' motivations to visit, what they like, what they experience, their propensity to recommend and measures these against other scheme participants. This enables us to determine which of our members are particularly successful in key performance areas and, in doing so, we can encourage the sharing of best practice.

In the last two years we have taken the opportunity to improve and extend our visitor experience benchmarking service. We now have 79 participants, up from 50 just two

Visitor Motivations

Understanding why people visit a tourist attraction is a key factor in delivering a great experience. BDRC has identified the seven key motivations for visitors, and our 79 participants are reaping the benefits of our in-depth analysis of these groups.

- Social Mindset
- Child Engagement
- Big Kids
- Tick Box
- **Special Focus***
- Topic Interest
- Broadening Horizons

* **80%**

of UK visitors are motivated by a specific exhibition, event, performance or activity. 46% check out the attraction's website before their visit.

2. Financial Benchmarking

Delivered by Lesley Morisetti Associates, our financial benchmarking service measures such data as average spend per visitor in membership, retail and catering across different attractions sectors.

ALVA's Financial Benchmarking Survey has been running for 19 years and now encompasses 85 attractions whose visitors number over 100,000 per annum.

- Participants submit responses each May via an online questionnaire, covering areas such as admissions, visitor income and operating costs
- Morisetti Associates reviews and checks the raw data and the benchmark analysis to produce a report setting out the findings, providing interpretation and context
- As well as full year results, the report also provides a three-year trend analysis
- New benchmarks for 2013/14 - Twitter followers and Facebook "likes"



Imperial War Museum, London



Canterbury Tales Museum gift shop

Admissions income has grown by 6% over the last three years.

Participants in the survey benefit from being able to compare their financial performance with others in the same sector, enabling them to identify areas of outstanding achievement and those that present a challenge for the future.

3. Mystery Guest Scheme

ALVA is a firm believer in seeing yourself through the eyes of another, and our in-house Mystery Guest scheme gives our members the opportunity to do just that.

It provides hugely valuable insights by allowing visitor experience managers from across our membership to visit each other and critically assess the visitor experience. In the past year we've overhauled the process to allow for a greater level of detail, as well as putting our members in direct control of giving feedback to their chosen attraction.

How the scheme works:

Guests taking part are issued with a comprehensive questionnaire to complete, which rates the attraction based on a number of criteria. These include:

- Planning the visit
- Car Parking
- Welcome
- Catering and retailing
- Lavatories
- Visitor care and safety
- Comprehensive questions on accessibility for groups with special or particular needs

They are also asked to give their overall impression of the welcome they received while visiting, and their lasting impression. Their feedback gives a genuine snapshot of the true guest experience and has proved invaluable to many of our members in

“

I felt very welcome and I was surprised by the whole experience of my visit from the beginning to the end, with plenty of exhibits, being greeted by friendly staff and actors guiding in costume.

Mystery Guest Scheme
feedback on Shakespeare's
Birthplace Trust.

”

ALVA Member events

ALVA has initiated specialised forums relating to key areas common to our membership: HR, Finance, Fundraising & Marketing and Education. Held on a six-monthly basis, they provide the opportunity for peers to share best practice and feature invited experts and guest speakers from within our membership.

HR Directors' Forum

Speakers have included:

Jane Rosier, Head of Marketing, V&A, on transforming the V&A brand.

David Hunt, Partner, Farrer & Co, with an update on Unfair Dismissal, Employment Tribunal fees, changes to TUPE regulations, changes to Fair Deal and ACAS Early Conciliation.

100% of respondents rated our most recent forum event as being very good or excellent.

Finance Directors' Forum

Speakers have included:

Barclays Bank on Trends and Financing Commercial Projects, and Tourism VAT.

Vernon Hunte, Cut Tourism VAT, Campaign Manager on the background to campaign, progress to date and plans for 2015.

David Hunt, Partner, Farrer & Co on Zero Hours Contracts.

85% of respondents rated our most recent event as being very good or excellent.



Tiger cub, Chester Zoo

Fundraising & Development Directors' Forum

Speakers have included:

National Funding Scheme on their new "Donate" product.

Christopher Goodhart from Blackbaud on the psychology of online giving.

Roland Pearce, Adam Birchall and Keli Sandeman from Barclays on giving through technology.

89% of respondents rated our most recent event as being very good or excellent.

Education Managers' Forum

Speakers have included:

Edge Watchorn, Head of Education, Houses of Parliament, on supporting young people, teachers and education professionals.

Warner Bros. Studio Tour London - The Making of Harry Potter.

Hampton Court Palace, Historic Royal Palaces.

100% of respondents rated our most recent event as being very good or excellent.



Eden Project, Cornwall



Blackpool Pleasure Beach

Membership & Friends Scheme Managers' Forum

Speakers have included:

Caroline Sanger-Davies, Chester Zoo.

Carolyn Young, Art Fund.

Elizabeth Jones, Farrer & Co.

Ian Oxley, National Trust.

Reema Khan, Royal Academy.

Robert Halkyard, Tate.

Sarah King, English Cathedrals.

98% of respondents rated our most recent event as being very good or excellent.

Marketing Seminars

We hold two seminars a year, one focusing on inbound tourism in partnership with VisitBritain; the other is focused on the UK domestic market.

Speakers have included:

China Union Pay.

Bicester Village.

Westfield.

European Tour Operators Association.

Farrer & Co.

Time Out.

Society of London Theatres.

Senior politicians.

“

New knowledge is power!

Danielle Dunbar, Titanic Belfast - feedback on ALVA Domestic Marketing Seminar, June 2014.

”



ALVA Meetings

ALVA's regular meetings are always hosted by a member of the Association, and in the last two years we have been welcomed at the Assembly Rooms in Bath, the Ashmolean Museum in Oxford, the National Museum of the Royal Navy in Portsmouth, the Kelvingrove Art Gallery and Museum in Glasgow and most recently at Stirling Castle. Our special thanks go to the teams in each location for their generous and superb hospitality.

Our three council meetings per year are an opportunity to discuss the common issues facing our members, share experience, identify best practice and build relationships.

Guest speakers

- Tourism Ministers from across the governments of the UK
- V&A
- British Museum
- Glasgow Life
- Roman Baths & Pump Room
- Arts Marketing Association
- Atlantic Productions
- VisitScotland
- Blue Sail Consulting
- TNS UK
- VisitBritain
- Culture 24
- Trajectory Partnership
- Glasgow Commonwealth Games



Mary Rose Museum, Portsmouth

Issues

- Mobile donation
- Friday "lates"
- Digital marketing
- The "staycation" effect
- Membership schemes
- Crisis Management
- The Olympic displacement effect
- Characteristics of the "boomer" generation



Ashmolean Museum, Oxford



Kelvingrove Museum and Art Gallery, Glasgow

Key lobbying priorities 2014/15

- Reduction in VAT on accommodation and attractions
- Improved process for securing visas, especially from China and India
- Reduction in Air Passenger Duty
- Greater Government support for VisitBritain, VisitEngland, VisitScotland, VisitWales
- Comprehensive broadband coverage
- Better integrated transport infrastructure, especially in rural areas
- Establish a comprehensive cross-Whitehall Ministerial Council on Tourism



Stirling Castle

Campaign for Tourism

- ALVA led and initiated
- Launched Oct 2013 by ALVA's Chairman
- To raise the profile and support for tourism by all political parties in the run-up to the UK General Election

Monthly Market Conditions

This survey is a snapshot of how the attractions industry is performing against last year.

It is organised by members of ALVA between themselves and for many years was generously compiled by the Roman Baths and Pump Room, Bath. The purpose of the survey is to give participating attractions information on market conditions as quickly as possible. It is circulated within six weeks by the ALVA team to all participants, and overall trends are shared at ALVA Council meetings.



“

Being involved with ALVA has been incredibly rewarding, both on an organisational and personal level. It's the only forum which brings together visitor attractions from across the commercial and public sectors to discuss issues that are relevant to all of us. To have access to a network of trusted colleagues who are willing to share their experiences, both good and bad, and to see first-hand how other attractions manage their business, has proved invaluable to me and the V&A.

Jane Rosier, Head of Marketing, V&A.

”

ALVA Media

Over the last two years ALVA has seen its media profile rise dramatically, with Director Bernard Donoghue fast becoming news outlets' "go-to" man for insights and comments relating to the UK tourism industry.

ALVA was instrumental in changing mayoral policy during the London 2012 Olympic and Paralympic games, following our campaign to change travel advice for tourists and visitors to encourage UK residents to visit the capital's attractions during the Games.

ALVA has enjoyed extensive nationwide coverage since 2012, and our annual release of visitor figures to our member sites has become a highly anticipated media event. Coverage in the following news reporting services has seen our profile raised dramatically, increasing our influence and boosting our membership.

- The Times
- The Guardian
- The Independent
- The Herald
- The Scotsman
- Evening Standard
- The Times Scotland
- BBC News
- ITV News
- Sky News
- CNN
- The Economist
- New York Times
- Channel 4 News
- Daily Mail
- Sunday Times
- Time Out
- Daily Express
- Le Figaro
- Washington Post
- Financial Times



“ We are working with the local and national tourist boards and others to turn the millions of Olympic TV viewers who loved how Britain looked into visitors who will come here in the next months and years. ”

ALVA press release, Oct 2012, reported across the media.



@alva_uk

Twitter reach: **102,000** by Sept 2014 from zero in 2012.
14,000 tweets since launch.

ALVA Scotland

The UK tourism industry is as diverse as the country itself, which is why we hold meetings and workshops tailored to our Scottish members. We address particular Scottish issues and trends and act as a forum to liaise with the Scottish Government, VisitScotland and other agencies.

Scottish tourism is a booming industry, and the trend looks set to continue following Glasgow's hugely successful hosting of the Commonwealth Games in summer 2014 which brought the city and Scotland as a whole to a massive global audience. The Ryder Cup in September 2014 brought one of the world's most-watched sporting events back to Gleneagles and put Scotland firmly in the spotlight once again.

12%

increase year to date in visitor numbers vs 2013

ALVA Scotland meetings are held on a six-monthly basis, and hosts have included Edinburgh Zoo, The Scottish National Portrait Gallery, The Royal Botanic Garden Edinburgh and Historic Scotland.

Speakers have included VisitScotland, The British Hospitality Association Scotland, Scotland Food and Drink and VisitBritain.

Scotland is currently outperforming the UK market by 6%

73% of visitors to Scotland visit a famous monument or building - the highest figure in the UK

ALVA Scotland membership covers 30 visitor attractions from the following organisations:

Continuum Group, Glasgow Museums, Historic Scotland, National Galleries of Scotland, National Museums Scotland, National Trust for Scotland, Royal Botanic Gardens Edinburgh, Royal Collection, Wildfowl and Wetlands Trust.

ALVA London

London. The most popular tourist city in the world.

16.8 million visitors in 2013.

For many visitors to the UK, London - a vibrant blend of the modern and contemporary, history and heritage - is their natural starting point.

As our Visitor Figures for 2013 show*, London is home to many of the country's most popular tourist attractions - among them The British Museum, ZSL London Zoo, National Gallery, Natural History Museum, Tate Modern, Science Museum South Kensington and the V&A.

Here at ALVA we recognise the issues and challenges that are particular to London, and hold regular meetings and workshops for our London members.

*Visitor figures available at www.alva.org.uk

ALVA London meetings are held on a six-monthly basis and hosts have included Shakespeare's Globe, Kenwood Houses and The Houses of Parliament.

Speakers have included KidRated, The Society of London Theatres, The Mayor's Office, London & Partners, Made and Time Out.



Natural History Museum, London

ALVA London membership covers 50 visitor attractions from the following organisations:

British Library, British Museum, City of London Attractions, English Heritage, Historic Royal Palaces, Houses of Parliament, Imperial War Museums, National Gallery, National Museum of Science & Industry, National Portrait Gallery, Natural History Museum, Old Royal Naval College, RAF Museums, Royal Academy, Royal Collection, Science Museum Group, Shakespeare's Globe, Somerset House, South Bank Centre, St Paul's Cathedral, Tate Gallery, The Churches Conservation Trust, The Royal Museums Greenwich, The View From the Shard, Victoria and Albert Museum, Warner Bros. Studio Tour London -The Making of Harry Potter, Westminster Abbey, Wildfowl and Wetlands Trust, Zoological Society of London.

ALVA Partners

ALVA strongly believes in the importance of sharing experience and best practice, and enjoys fruitful relationships with many leading industry organisations, including:

- **VisitBritain**
- **VisitEngland**
- **VisitScotland**
- **VisitWales**
- **Tourism Ireland**
- **Association of Independent Museums**
- **Tourism Alliance**
- **Historic Houses Association**
- **British Hospitality Association**
- **Merlin**
- **Scottish Tourism Alliance**
- **Association of English Cathedrals**
- **National Museum Directors' Conference**
- **Association of Scottish Visitor Attractions**
- **Heritage Alliance**
- **Kids in Museums**

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Our sincere thanks go to all our partners and sponsors.



Leeds Castle, Kent



“

It was only after joining ALVA in 1999 that we realised just how much we were flying blind as a major visitor attraction. Membership of ALVA gave us the opportunity to network with people facing similar challenges to ourselves and to benchmark our visitor experience and financial performance against others in the business. Every year from 2000 onwards has brought unpredictable challenges in the form of geo-political uncertainties, economic fluctuations, leisure-time competition and environmental scares, and the understanding of our place in the attractions landscape that ALVA membership has given us has enabled us to plan in a way that would not otherwise have been possible.

”

Stephen Bird, Head of Heritage Services, Bath & North East Somerset Council.

Contact ALVA

Association of Leading Visitor Attractions

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Facebook: www.facebook.com/alva.uk Twitter: [@alva_uk](https://twitter.com/alva_uk)

ALVA membership criteria:

As part of ALVA's evolution, the Board has broadened the membership criteria; this will ensure that ALVA continues to attract, unite, inspire and influence.

ALVA now welcomes visitor attractions which:

- Educate, entertain and inspire visitors through their place, permanent collections, temporary exhibitions, events, management, preservation work, preservation of heritage, education work and site-specific performances which reflect the organisation's purpose and mission
- Receive more than 1 million visits in a calendar year to their sites (either single sites or collectively as a corporately managed multi-site organisation or as members of a marketing association or entity) and to attraction-specific events based at their sites
- Are permanently established
- Are of national significance
- Are open to the general public, either paying or free
- Which are committed to continually improving their visitor experience and welcome
- Which have catering and retail provision



Housesteads Roman Fort, Northumberland



Packwood House, Warwickshire



