

# 2019 Membership Survey

June 2020

# AVEA

## ASSOCIATION OF VISITOR EXPERIENCES & ATTRACTIONS

*Representing the Irish Visitor Experience & Attractions Sector*

Visitor Attractions and Experiences are a key component of Irish Tourism, providing visitors with compelling reasons to choose Ireland as a holiday destination. AVEA conducts an annual survey of its members to gather core information on the nature, scale and scope of their business operations, and on key issues affecting performance.

### 1 In 2019, AVEA members received 25.3 million visitors

AVEA's members received an estimated 25.3 million visitors in 2019: 22.6 million in the Republic of Ireland, and 2.7 million in Northern Ireland. This represented 57% of visitors to all attractions in the Republic, and 24% of all visits to attractions in Northern Ireland.



### 2 Generating 4,500+ jobs nationally

AVEA members are significant employers, with our respondents reporting an average of 53 staff members. It is estimated that our total membership employs 4,500 - 4,750 nationally.



### 3 Combined revenue of €501 million

AVEA's members generate an estimated €501 million in revenue, a very high proportion of which flows into local economies in wages and purchasing of goods and services. Some AVEA members do not charge an entrance fee.

### 4 Where did they come from?

Dublin's share of GB, USA and European visitors was higher than the rest of Ireland, whereas domestic visitors in the rest of Ireland were far higher than Dublin's share. Dublin sites attract on average 79% international visitors, while sites outside Dublin are much more dependent on the domestic market, with 57% originating in Ireland/Northern Ireland.



Ireland/NI 45%



America 20%



Europe 17%



Other 10%



Britain 8%



### 5 When do they visit?

For Dublin attractions, 55% arrive May to September. Outside Dublin, 59% arrive May to September, i.e. the peak season is more pronounced outside Dublin.

## 6 Categories of Visitors by ticket type



Individual **68%**



Groups **19%**



Education Groups **7%**



Other **6%**



Individual tickets include adult, children, family and concessions. 'Other' visitors includes those attending events, festivals and memberships, represent 6%.



## 7 Visitor spend in attractions

	Dublin	Rest of Country
Admission fee	53%	53%
Giftshop/Retail	25%	20%
Café/Restaurant	3%	13%
Private Hire, Events, Other	19%	14%

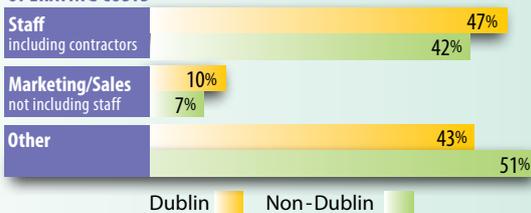
## 8 Average spend by visitors in attractions

	Ticket Price	Retail Spend	F&B Spend
All Island Average	€9.51	€5.23	€5.15
Dublin Average	€10.60	€5.30	€4.92
Outside Dublin Average	€8.74	€5.17	€5.25



Note: Extreme values are excluded. F&B spend results are based on those members who specifically have retail and/or an F&B outlet. Variation also exists depending on attraction size. Spend at Northern Irish attractions has been converted to euro.

### OPERATING COSTS



## 9 Operating costs

Staff costs are the largest single item, given that multiple different costs are included under 'Other Costs'. Dublin sites allocate a greater share of their operating budgets to marketing and sales (excluding staff).

## 10 Staff

Of the 4,045 staff employed all over the island, 43% are full-time, 29% part-time and 28% seasonal. However, for non-Dublin attractions, only 35% are full-time, compared with 58% in Dublin. The key areas where respondents reported difficulties in recruiting staff were: guides, kitchen staff, middle management, and sales/marketing.

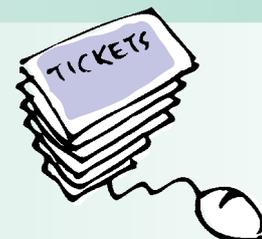


## 11 Staff skills shortages

Respondents identified a number of areas where they felt there was a skills deficit: Languages 65%; Communications 30%; and Customer Service 40%.

## 12 System & On-Line Ticket Purchase

77% of respondents have integrated systems. 85% offer admission tickets on-line. Two-thirds of respondents who offer admission tickets on-line reported that this distribution channel represented less than 16% of total ticket sales. This is unchanged relative to previous year.



**Looking Ahead** Almost all responses to this survey of business performance were completed prior to the arrival of the Covid-19 pandemic in Ireland. At that time, respondents were expecting visitor numbers to fall by 10% in 2020. However, the outlook has changed dramatically since then, and AVEA Covid-19 surveys carried out in April and May of this year found that members now anticipate a drop of as much as 70% in visitor numbers in 2020.

These statistics are drawn from a survey conducted by CHL Consulting, drawing on a sample of 76% of AVEA members and are indicative of trends in sectoral performance.