

AVEA

ASSOCIATION OF VISITOR
EXPERIENCES & ATTRACTIONS

SURVEY OF MEMBERS

2022

PERFORMANCE REPORT



*Representing the Irish
Visitor Experience &
Attractions Sector*



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**SURVEY OF
BUSINESS PERFORMANCE 2022**




**ASSOCIATION OF VISITOR
EXPERIENCES & ATTRACTIONS**

- Detailed Results -

August, 2023

CHL

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FOREWORD

Geraldine Enright, AVEA Chair, August 2023



Dear members

When AVEA was founded in 2017, one of our core objectives was to fill the data gap that existed around the value of the visitor experience and attractions (VEA) sector in Ireland. As a fledgling representative association, our Board knew that the most powerful case-making tool for our advocacy would be the collection of robust information, independently collected and impartially reported. AVEA commissioned CHL Consulting to undertake the Annual Survey of Membership Business, and this, our sixth version, reveals to you now the true picture of the post-Covid business performance of the 2022 season.

It is clear from the Survey Report that the recovery of the VEA sector commenced almost as soon as COVID-19 restrictions were lifted on 22nd January 2022. We all remember the immense challenges that were presented to our businesses during lockdown, and during the period when social distancing measures applied, but we experienced a universal sense of optimism and joy when we were permitted to re-open our doors and welcome our visitors. We will never forget how important our core teams were during the difficult years, and how resilient and good-humoured our staff were in the face of ever-changing protocols and upheavals to our business practices. Of course, it took time for international visitors to return, first with the restoration of international connectivity, and then, over the following months, the lifting of travel restrictions, but our businesses were glad to see that the much-reported pent-up demand for travel seemed, on first glance, to be materialising. 🗺️ While the initial optimism greatly lifted our spirits, other external factors soon loomed to challenge the recovery of tourism. The invasion of Ukraine on 24th February 2022 sent shock waves throughout Europe, resulting in the displacement of hundreds of thousands of Ukrainian citizens. 🗣️

Energy insecurity and rising costs damaged travel confidence, and inflation had a dampening effect on our key European markets. Meanwhile, the strong dollar boosted US interest in visiting Ireland, and strong overseas marketing campaigns by Tourism Ireland firmly put Ireland on the holiday wish-list. While the overall picture broadly aligned with the recovery trajectory that had been forecast by tourism observers, it is fair to say that not all businesses have experienced the same pace of recovery.

I am delighted that our member consultation workshop in February 2023 has resulted in a surge in response rate, to 73%. I would like to thank all our members who continue to engage and provide responses, to empower Catherine with the facts and figures to work on your behalf. As the Association continues to grow, the Survey will provide a consistent annual set of rich and meaningful data for your benefit. It will also assist other sectors and stakeholders in Irish tourism to truly understand the nature and value of the VEA sector, and the vital role it plays in both urban and rural

settings in driving economic activity and social sustainability. In 2024, we intend to go out to our membership with our survey in Q1, and we once again will be requesting that all members participate as fully as they can to provide us with an accurate, complete and representative picture to galvanise our advocacy efforts.

In addition to research, AVEA continues to pursue its other core objectives of member networking and knowledge exchange, advocacy, education and career development, and best sustainability practices. Fáilte Ireland provides ongoing support by consulting with us regularly to ensure business supports, learning opportunities, insights and programmes, to enable VEAs to innovate and grow. Our Platinum Partners provide valuable financial assistance which enables the Association to deliver a comprehensive programme of in-person events such as our Member Fora and our Annual Conference. AVEA engages with, and contributes to, the wider tourism sector by participating in stakeholder groups such as Fáilte Ireland's Industry Advisory Group, the Tourism and Hospitality Forum, and the Irish Tourism Industry Confederation (ITIC.) AVEA will not be found wanting in seeking an audience with the most senior decision-makers to ensure our members can achieve their full tourism potential.

It is clear, from conversations with members in 2023, that we continue to experience mixed fortunes, with external factors impacting on our recovery. The cost of doing business has never been higher, and we are acutely aware that delivering outstanding, memorable experiences in an innovative and authentic way is not easily done as costs rise. To navigate the path to recovery, our collective voice will rely even more on the data and insights that our members provide, so your Association can continue to deliver meaningful, evidence-based advocacy. Please be assured that you have the unwavering support of your board and executive in representing your business interests.

Geraldine Enright



1. SURVEY INTRODUCTION AND EXECUTIVE SUMMARY

1.1 Introduction

This report presents the findings of the sixth annual survey of AVEA's members with regard to their business performance over the previous year. This iteration of the survey covers 2022, as members exited from Covid-19 restrictions and returned to normal business.

The survey questionnaire was issued to 106 AVEA members in April 2023. Responses were received from 78, representing a response rate of 74%. 32 of the respondent sites (41%) are in Dublin and 46 are spread throughout the rest of Ireland. 20 of the respondent sites are operated directly by State bodies and local authorities; the remainder are run by private entities, 25 of which are not-for-profit.

One of the criteria for membership of AVEA is agreement to participate in the Association's annual survey of business performance. The purpose of this survey is to gather core information on the nature, scale and scope of the business operations of AVEA members and on key issues affecting performance. The findings of the survey enable members to benchmark their performance against industry standards. They also enable AVEA to represent and promote the interests of its members more effectively and to communicate the value of the sector's contribution to Irish tourism to relevant industry stakeholders and State agencies.

1.2 Executive Summary

- 1) Following two years of severe restrictions imposed under the Covid-19 pandemic, visitor attractions and experiences returned to a more normal operating season in 2022. Survey respondents were open for an average of 45 weeks in 2022, a substantial increase on the average of 29 weeks recorded in 2021 and a return almost to the 2019 average of 49 weeks.
- 2) The 78 survey respondents received a total of 13.3 million visitors in 2022, significantly more than in 2021 but still well below the 22.9 million received by respondents to the 2019 survey. Some 54 sites responded to both the 2019 and 2022 surveys, and their combined admissions in 2022 were 22% below their total in 2019. This figure is a little better than the overall performance of tourism in Ireland in 2022 which ITIC have estimated was 27% below the 2019 level.

- 3) The rank order of source markets in terms of admissions is essentially the same as in previous years. However, the share accounted for by the domestic market (including Northern Ireland) has fallen from 47% in 2019 to 43% in 2022 despite the fact that overall visitor numbers are much lower. Thus, there appears to have been a drop in domestic market demand for visitor attractions.
- 4) The shares of demand accounted for by overseas markets have arisen for all major markets except Britain. North America continued to be the second most important source of admissions after the domestic market. The distribution of demand by source market is broadly consistent across the main categories of attraction with the exception of brand experiences for which North America is the largest source followed by the domestic and British markets.
- 5) The results for 2022 show a strong uplift in group traffic post-Covid with group admissions, inclusive of all types of groups (including group tours, education groups, day tours and other groups), accounting for some 25% of total admissions in contrast to a little over 7% in 2021. The corresponding figure for group admissions in 2019 was 26%. Within this ticket category, group tours are much more important at sites outside Dublin where they accounted for 17% of admissions compared to just 6% in Dublin.
- 6) In 2022, the share of revenue earned from ticket sales averaged 55% which was consistent with pre-Covid patterns. Retail and café/restaurant sales respectively accounted for 15% and 9% of total revenue. Café/restaurant sales are much more significant as a share of revenue at sites outside Dublin. This is to be expected as tourists visiting attractions outside Dublin are frequently travelling some distance to reach them and having a snack or meal at the attraction forms part of the overall visitor experience.
- 7) There was a small increase of 7% in The average yield from ticket sales rose by 7% to €10.76, net of VAT, despite the change in visitor mix, notably the significant increase in tour group traffic. The average retail spend per visitor (€5.13) fell back to 2019 levels, having risen to €5.97 in 2021. Food & beverage sales averaged €5.40 per visitor, just 3% ahead of 2021. The median or central value in the set of responses may be a more representative figure for many

- attractions, with the median ticket yield per visitor being €8.76, median retail spend being €2.66 and median food and beverage spend per visitor being €4.24. All of these figures are net of VAT. Brand experiences recorded significantly higher average sales per visitor in ticketing, retail and F&B.
- 8) The survey findings show that there is, potentially, an average of around €21 per visitor, net of VAT, to be earned by attractions from ticket sales, retail and food & beverage. Minor additional revenue sources, such as events, festivals, rentals, parking etc. would add to this. The cumulative median value amounted to €15.66.
- 9) Staff costs account for the largest share of operating costs at 48% of the total which is consistent with the figures for previous years. Repairs & maintenance (9%), energy (8%), and marketing/sales costs are the next most significant cost items. Insurance averaged 4% of total operating costs.
- 10) 74 out of the 78 survey respondents gave their staff numbers and together employed a total of 3,702 people in 2022, an average of 50.0 per site. This is a little below the average of 53.2 employees per site recorded by respondents in 2019. Some 42% of these employees are engaged on a full-time year-round basis, with the balance divided between part-time year-round (22%), seasonal (23%) and volunteers (13%).
- 11) The areas of greatest need in recruitment are guides, general front-of-house, sales & marketing and retail. High proportions of respondents have experienced difficulties recruiting staff for these positions. The principal obstacles to the recruitment of new staff in 2022 were a lack of candidates, level of pay and seasonality of employment.
- 12) A high proportion of respondents (85%) have the capability to sell tickets online, but over 40% of these want to further upgrade their systems. The overall average share of tickets sold online was 34% in 2022 which was double the average of 17% recorded in 2019. The shift to online shopping and bookings during the Covid-19 pandemic contributed to this rapid growth, but it also reflects evolving consumer behaviour in general. Almost 90% of respondents expect this trend to continue.

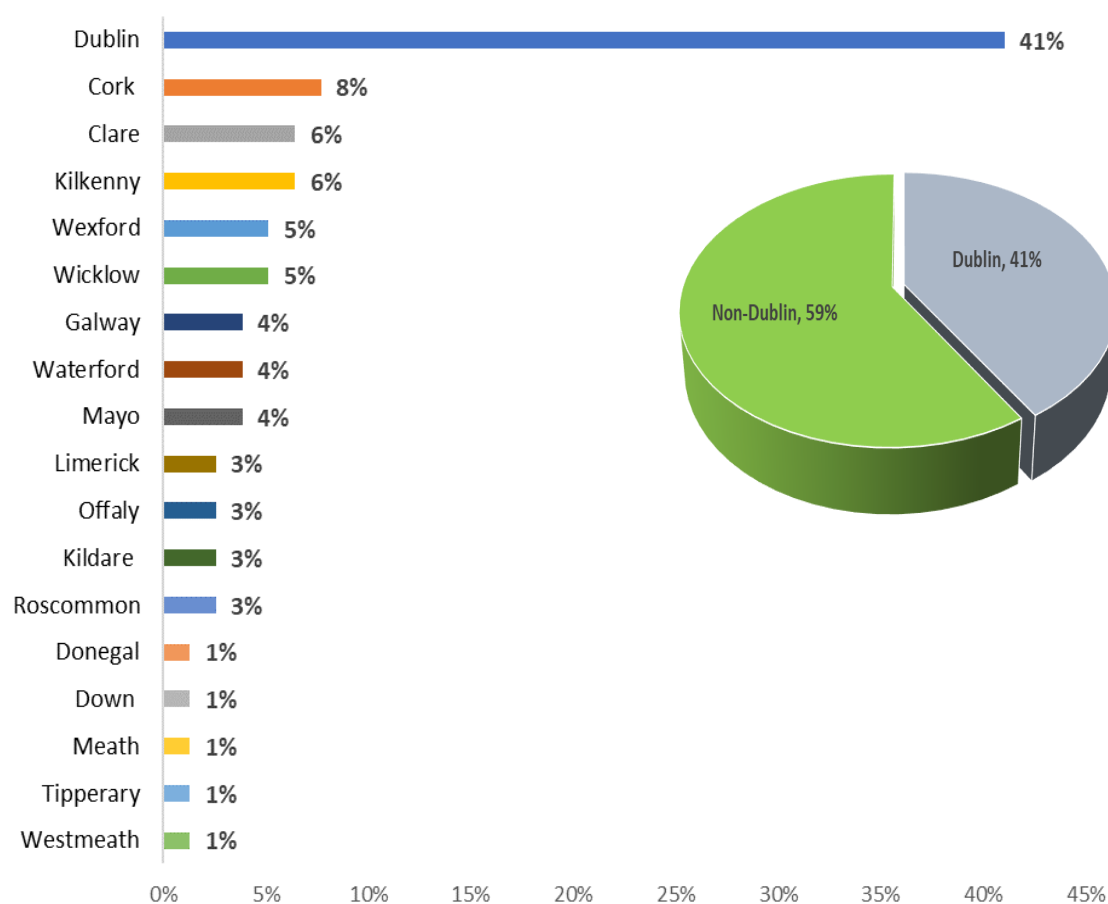
- 13) Virtually all respondents are active on social media channels with Facebook and Instagram being the most widely used and ranked as the most important in terms of market communications. Twitter and YouTube are the next most important.
- 14) Looking ahead, 98% of respondents anticipate increased visitor numbers in 2023 with slightly fewer (94%) expecting increased revenue. The average scale of increase expected in both visitors and revenue is 17%. If demand in 2022 was 22% below the 2019 peak, as indicated by the comparison of performance across both years at some 54 sites, the anticipated growth in 2023 will leave the sector still a little short of that peak.

2. ABOUT YOUR ATTRACTION

2.1 Location

32 of the 78 respondents (41%) are based in Dublin. The remaining 46 are spread across some 16 other counties in the Republic of Ireland and Northern Ireland. This is a reflection of the concentration of larger attractions in Dublin.

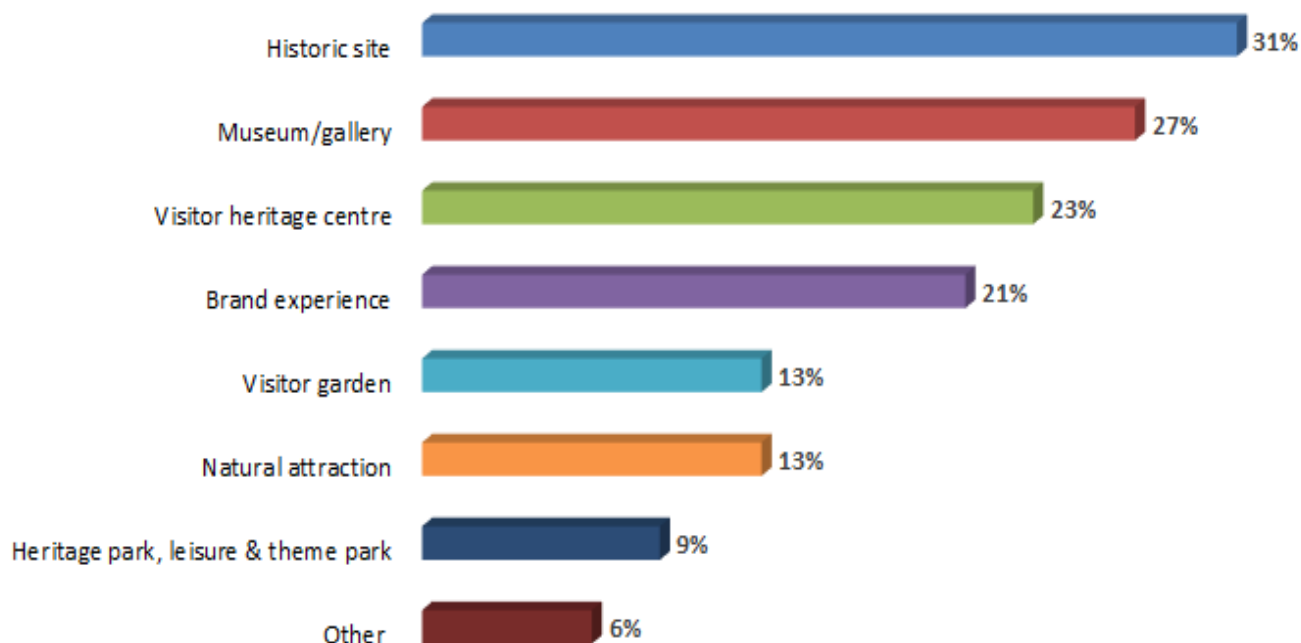
Figure 2.1: Distribution of Respondents by County



2.2 Category of Attraction

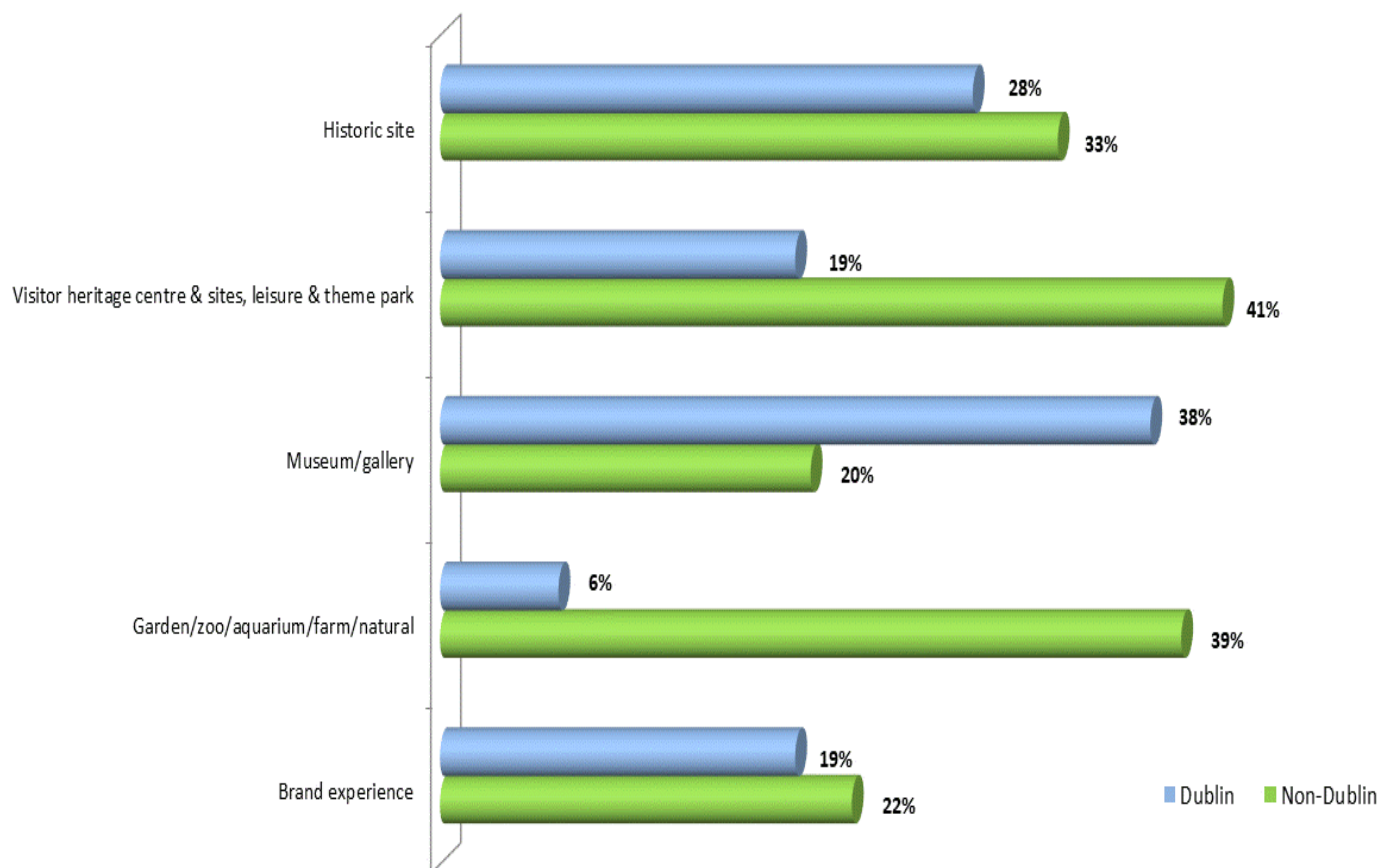
Historic and heritage experiences, including museums and galleries, together account for four in every five respondent attractions. A number of respondents fall into more than one category as they offer two or more distinctly different experiences. The distribution of respondents by category of attraction is shown in Figure 2.2. ‘Other’ includes theatre, sightseeing tours (both land and water based) and evening cruises.

Figure 2.2: Category of Attraction



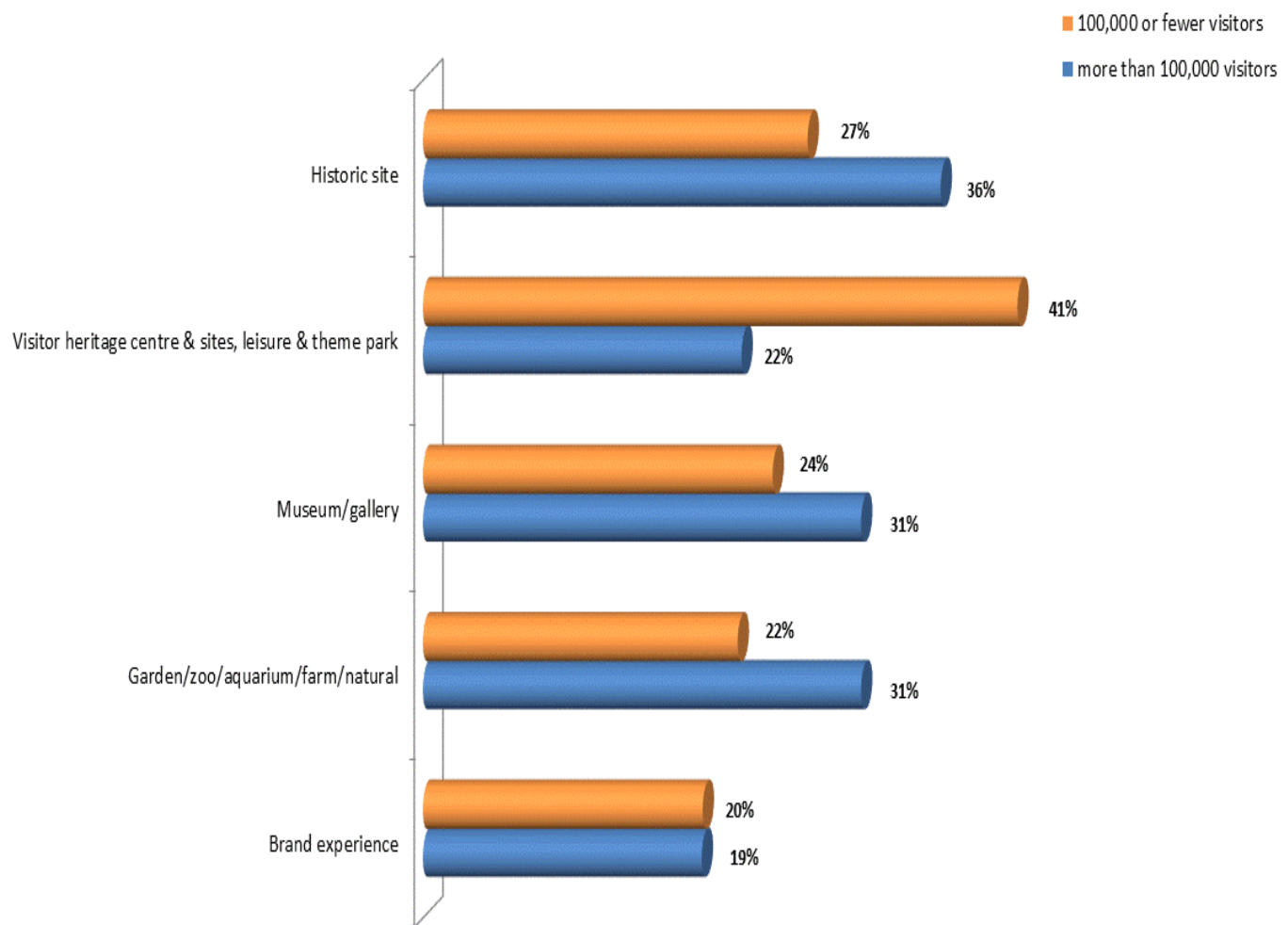
Note: Totals add to more than 100% as a number of respondents fall into more than one category.

Figure 2.3: Category of Attraction – Dublin vs Non-Dublin



As Figure 2.3 shows, the distribution of attraction by category differs quite a bit between Dublin and the rest of the country. Thus, heritage centres and sites and attractions based on nature are more commonly located outside Dublin while the city has a greater concentration of museums and galleries. Brand experiences and historic sites are more equally shared.

Figure 2.4: Category of Attraction
 – 100,000 or fewer visitors vs more than 100,000 visitors

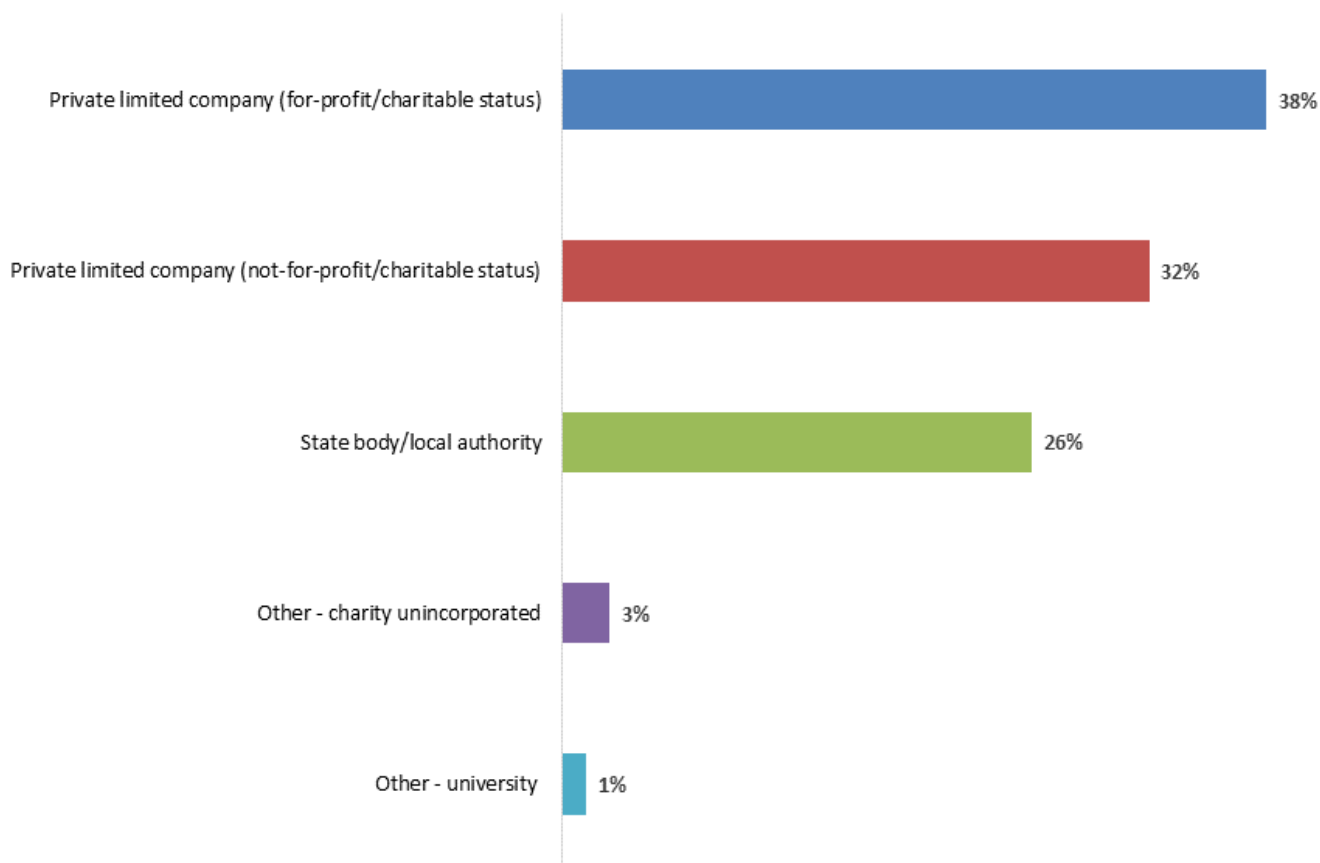


Most categories of attractions have reasonable similar distributions in terms of scale of visitation, the notable exception being heritage centres which includes many of the smaller sites.

2.3 Type of Organisation

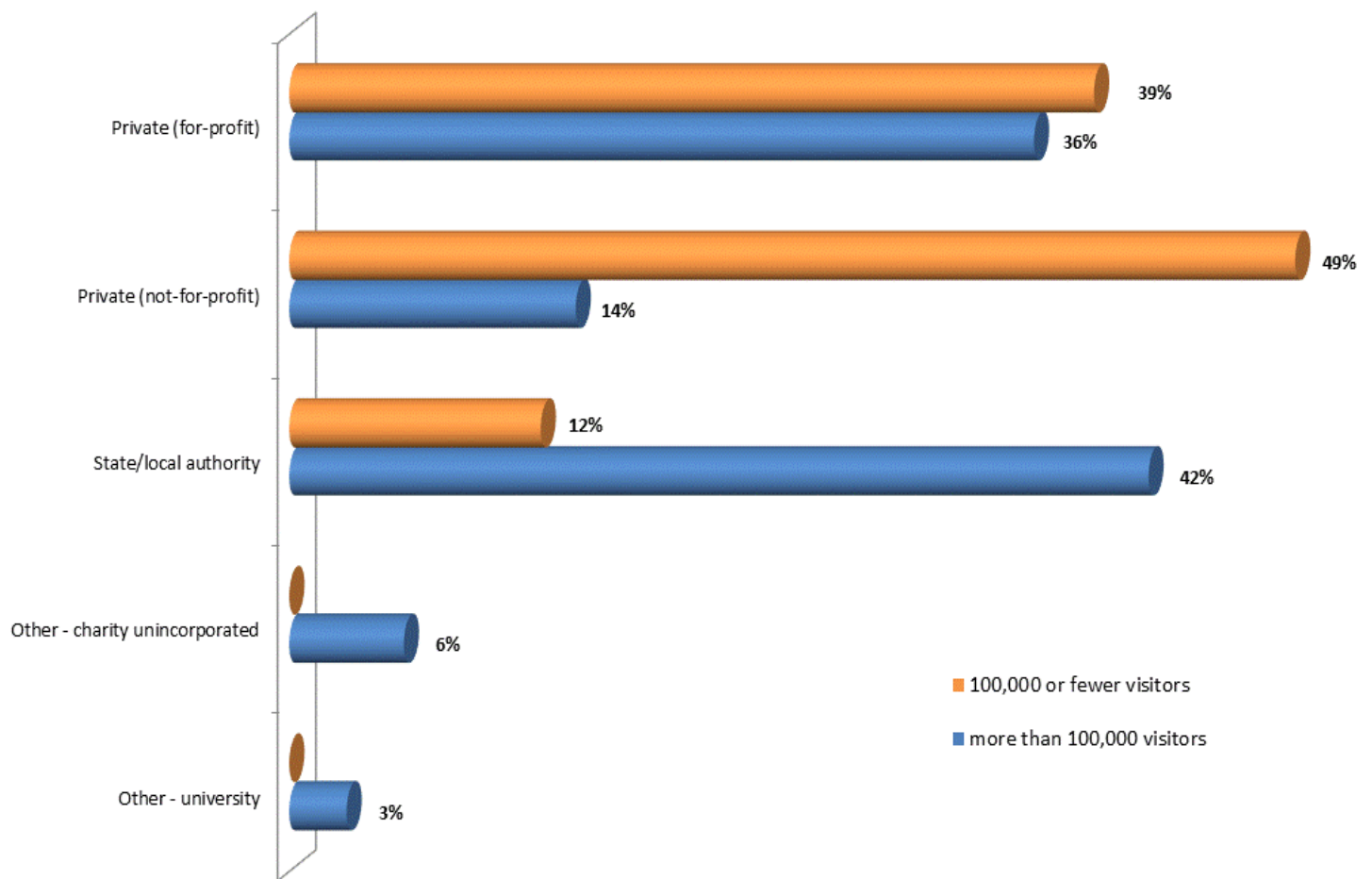
38% of respondents are private commercial operators and a further 32% are private not-for-profit companies. The latter are typically companies limited by guarantee with many, if not most, having charitable status. 26% of the respondents are owned and operated by State agencies or Local Authorities. The remaining balance of ‘Other’ respondents comprises sites of unique corporate form, including unincorporated charities and universities.

Figure 2.5: Distribution of Respondents by Organisation Type



In terms of organisation type by number of visitors, the majority of respondent attractions (60%) receive less than 100,000 visitors per annum. Of these, almost all (88%) are private organisations (both for-profit and not-for-profit).

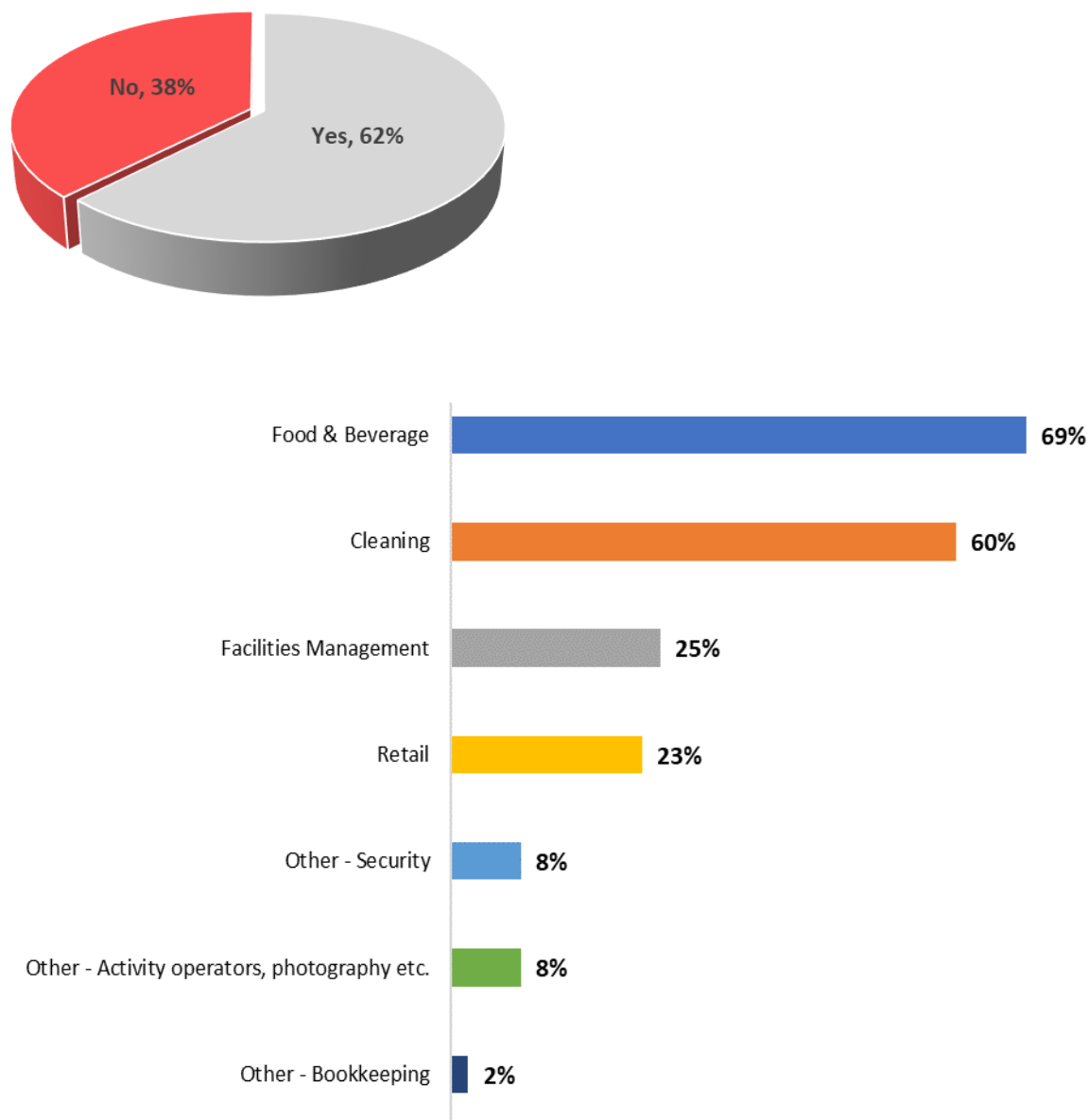
Figure 2.6: Distribution of Respondents by Organisation Type and by Number of Visitors – 100,000 or fewer visitors or less vs more than 100,000 visitors



2.4 Use of External Contractors/Concessionaires

62% of the survey respondents employ external contractors and/or concessionaires on site. As Figure 2.7 shows, such external providers are mostly used to operate food and beverage outlets and provide cleaning services. Smaller proportions of respondents engage external contractors to provide facilities management services and to run retail outlets.

Figure 2.7: Use of External Contractors / Concessionaires



2.5 Weeks Open to Visitors

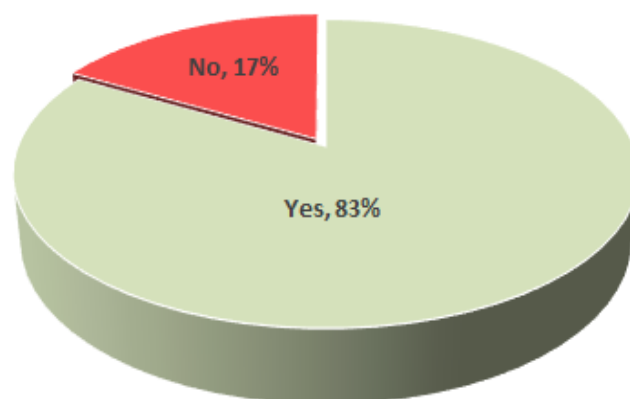
Respondents were open for an average of 45 weeks in 2022. This is a substantial increase on the average of 29 weeks recorded in 2021, and a return almost to the 2019 average of 49 weeks. It may be noted that the Government lifted all Covid-19 restrictions on 22nd January 2022 which meant that 49 weeks was the maximum number of weeks an attraction could be open in 2022.

Dublin-based respondents had a longer season than those outside Dublin, being open for an average of **49 weeks** – the maximum possible - compared to **42 weeks** for those located outside Dublin.

2.6 Admission

Over 80% of respondents charge for admission. Those who offer free admission are all owned or funded by the State.

Figure 2.8: Charge for Admission



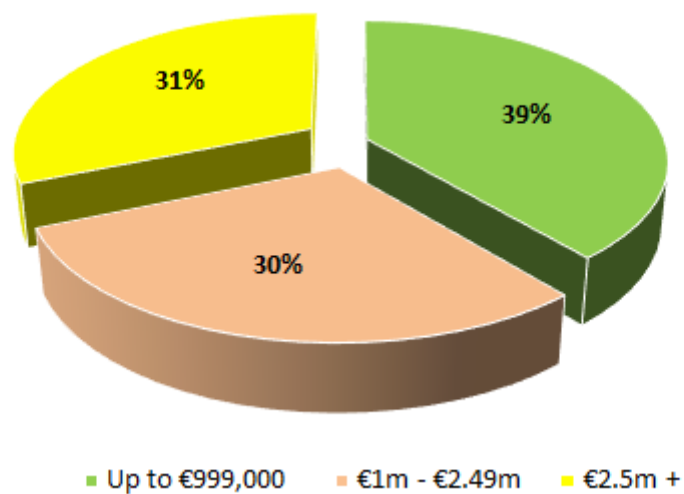
3. FINANCIAL DATA

3.1 Revenue in 2022

The distribution of respondents by scale of revenue is detailed in Figure 3.1 below. In total, the 67 respondents who answered this question generated €201.7 million in revenue in 2022. At many sites (39%), annual revenue amounts to less than €1 million; another 30% earn between €1 million and €2.5 million, with the balance (31%) earning over €2.5 million.

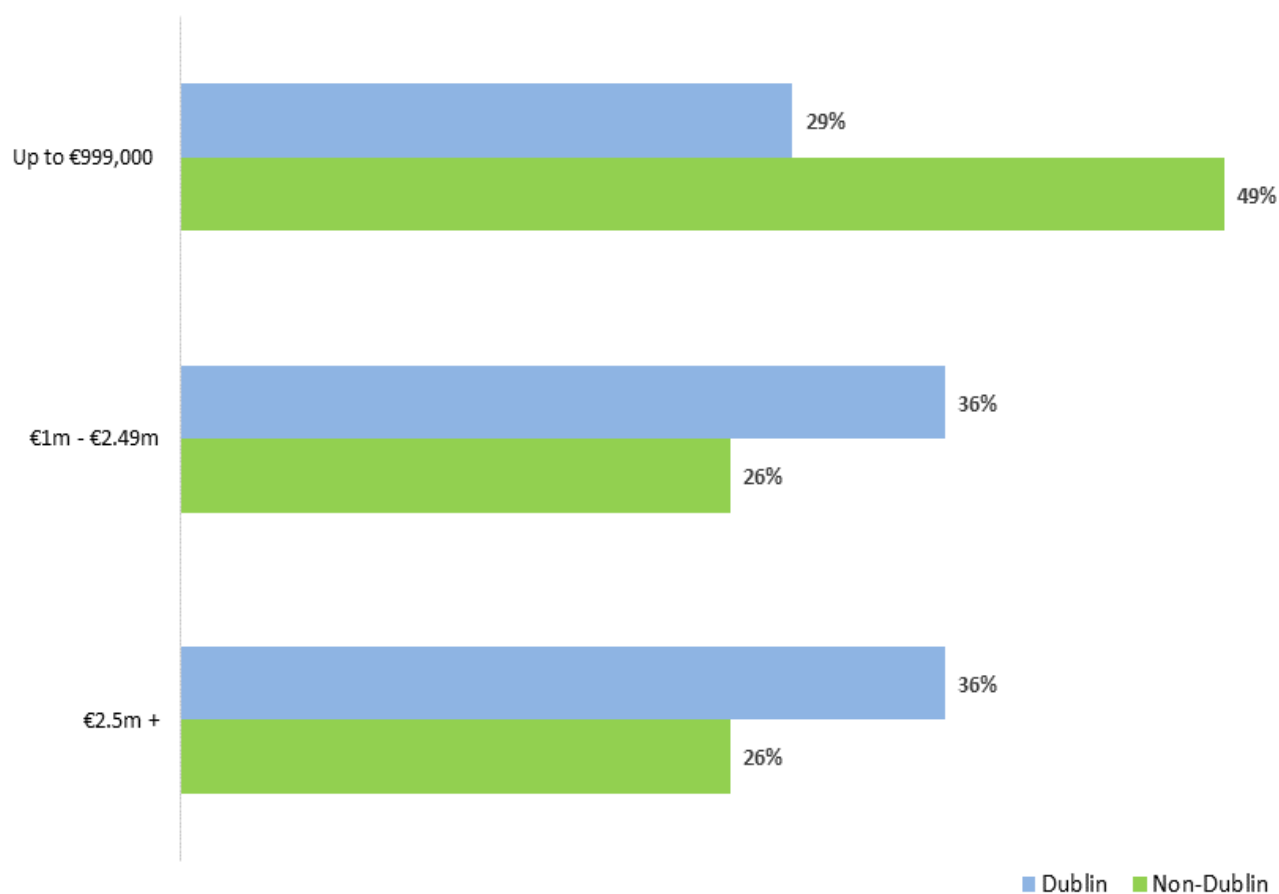
	Actual	%
Up to €999,000	26	39%
€1m - €2.49m	20	30%
€2.5m +	21	31%
Total	67	100%

Figure 3.1: Distribution of Respondents by Revenue



The geographic distribution of respondents by scale of revenue underlines the extent to which larger attractions in turnover terms are located in Dublin. Thus, just 29% of respondents in Dublin earn less than €1m, whereas 49% of attractions outside Dublin fall into this category. At the other end of the scale, 36% of Dublin-based respondents earn more than €2.5m compared to 26% of those outside Dublin.

Figure 3.2: Distribution of Respondents by Revenue – Dublin vs Non-Dublin



3.2 Distribution of Revenue by Source

The distribution of revenue by source is shown in Figure 3.3. Note that publicly-funded institutions are not included in this table as the bulk of their revenue comes from the State and their inclusion would distort the averages which are representative of the majority of respondents.

In 2022, ticket sales accounted for an average of 55% of revenue, followed by retail at 15% and café/restaurant at 9%. While there is some variation around the average distribution shown in Figure 3.3, it provides a good representative figure.

Figure 3.3: Distribution of Revenue by Source

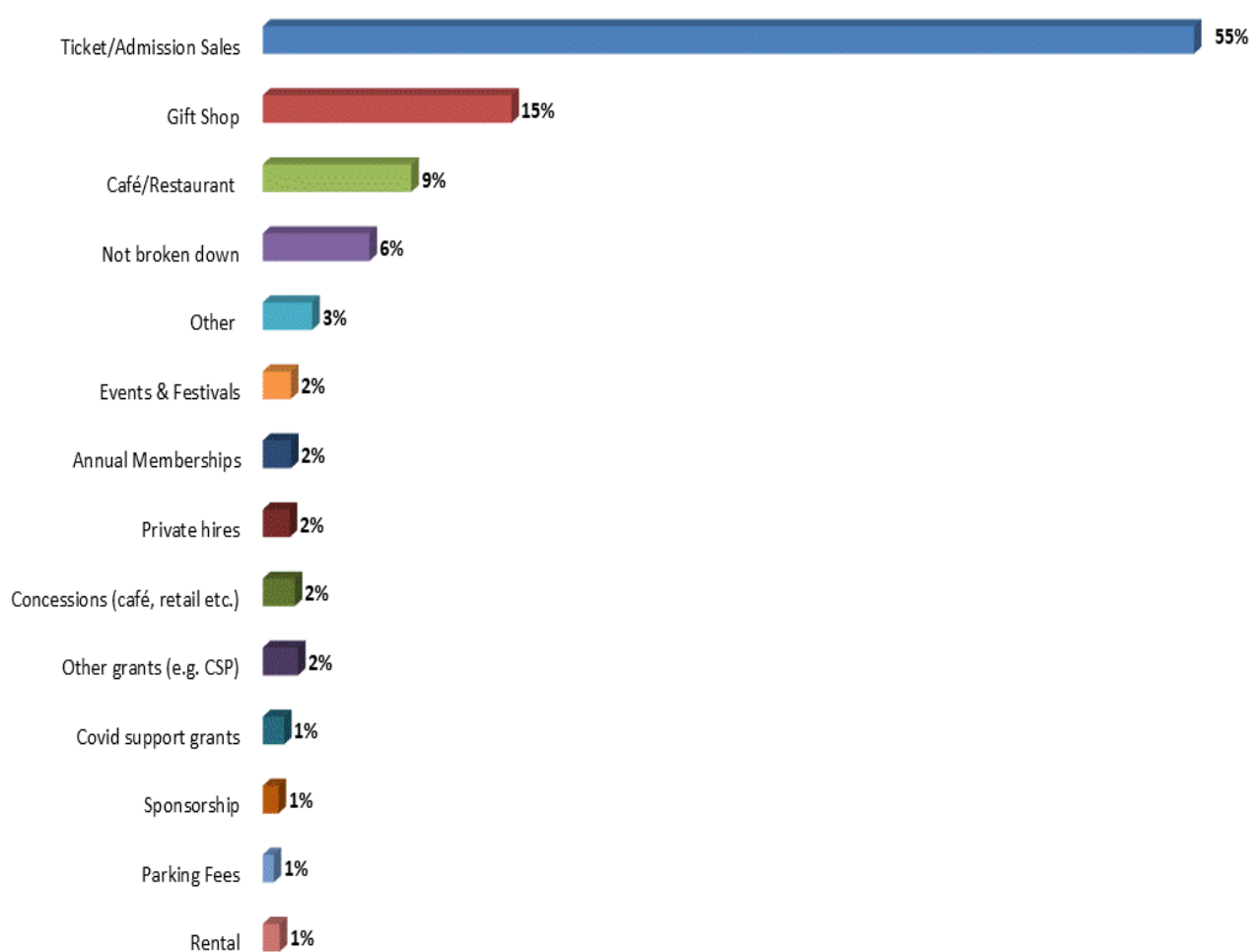


Figure 3.4: Distribution of Revenue by Source – Dublin vs Non-Dublin

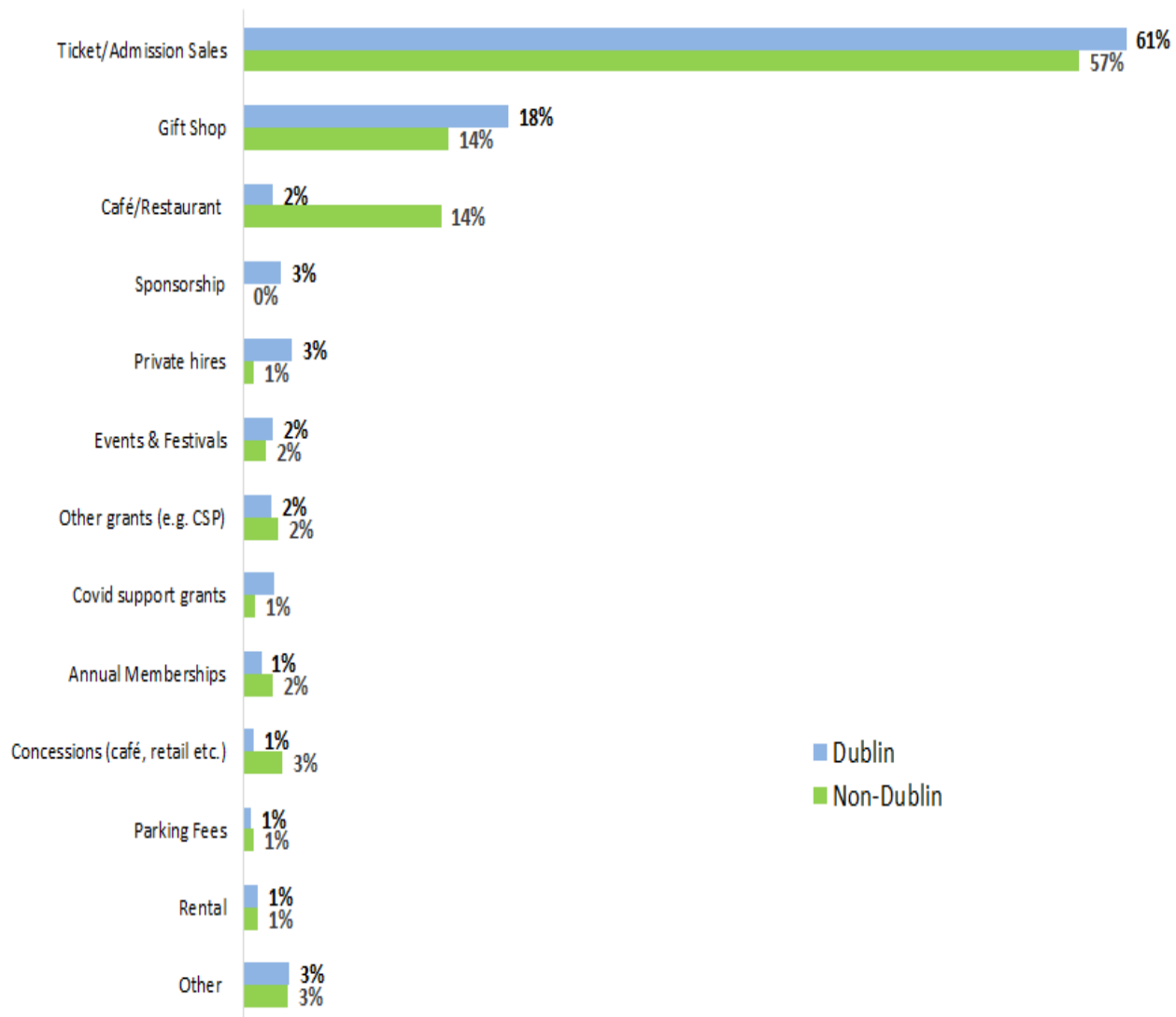


Figure 3.5: Distribution of Revenue by Source and Category of Attraction

	Historic sites	Visitor heritage centre /museum/gallery	Brand experience	Other
Ticket/Admission Sales	60%	42%	39%	68%
Gift Shop	18%	14%	46%	5%
Café/Restaurant	9%	10%	10%	9%
Events & Festivals	2%	3%	1%	1%
Private hires	1%	5%	1%	1%
Concessions (café, retail etc.)	0%	2%	0%	4%
Rental	0%	1%	0%	1%
Parking Fees	1%	2%	0%	1%
Annual Memberships	2%	1%	0%	3%
Sponsorship	0%	3%	0%	2%
Covid support grants	2%	4%	0%	1%
Other grants (e.g. CSP)	1%	10%	1%	2%
Gifts/donations	1%	2%	0%	0%
Other	3%	4%	2%	3%
	100%	100%	100%	100%

The category of attraction breakdown in this table is as follows:

- Historic sites - 23 respondents
- Visitor heritage centre/museum/gallery - 25 respondents
- Brand experience - 14 respondents
- ‘Other’ - 16 respondents

Other includes visitor gardens, zoos, aquariums, open farms, natural attractions, heritage park, leisure & theme parks.

Historic sites rely heavily on revenue from ticket sales along with retail and café but with few other sources on income. Heritage centres, museums and galleries generate income from a more diverse range of activities, although the core sources – tickets, retail and food & beverage – account for two-thirds of their revenue. As might be expected, brand experiences generate a very significant share of their revenue (46%) from retail.

3.3 Prices and Yields

Survey respondents supplied data on

- their average ticket sale price per visitor
- the average retail spend per visitor
- the average food & beverage spend per visitor.

The results are provided in Tables 1-3 below. All figures stated are net of VAT. Note that brand experiences are not included in this analysis as their retail sales are significantly higher than those for other attractions. The average retail and average F&B sales per visitor were €5.13 and €5.40 respectively.

Table 1: Average Ticket, Retail and Food & Beverage Sales per Visitor, net of VAT

Average Ticket Price, €	Average Retail Spend, €	Average F&B Spend, €
10.76	5.13	5.40
Median Ticket Price, €	Median Retail Spend, €	Median F&B Spend, €
8.76	2.66	4.24

The median values for respondents are also included in Table 1. The median is the central value in a set of data and therefore, for many attractions, would be a more representative value than the mathematical average which can be affected by a small number of unusually high or low figures. The median value for retail is a little over half the average value while the median value for F&B is almost 80% of the average value indicating a lower spread of values among respondents.

The data in Table 1 show that there is, potentially, an average of around €21 per visitor, net of VAT, to be earned by attractions from ticket sales, retail and food & beverage. (The cumulative median value is €15.66.) Minor additional revenue sources, such as events, festivals, rentals, parking etc. would add to this.

As shown in Table 2, average ticket prices and average retail yields are higher in Dublin than in the rest of the country, while average F&B yields are higher outside Dublin. However, median values for retail and F&B are much closer.

Table 3 shows that the popularity of an attraction has little impact on average ticket and retail yields, but attractions receiving fewer than 100,000 visitors have higher average F&B yields.

**Table 2: Average Ticket, Retail and Food & Beverage Sales per Visitor
- Dublin vs Non-Dublin**

	Average Ticket Price, €	Average Retail Spend, €	Average F&B Spend, €
Dublin	11.28	6.35	4.58
Non-Dublin	10.41	4.27	5.79
	Median Ticket Price, €	Median Retail Spend, €	Median F&B Spend, €
Dublin	9.55	3.00	4.24
Non-Dublin	8.18	2.49	4.23

**Table 3: Average Ticket, Retail and Food & Beverage Sales per Visitor
- 100,000 or fewer visitors vs more than 100,000 visitors**

	Average Ticket Price, €	Average Retail Spend, €	Average F&B Spend, €
100,000 or fewer visitors	10.85	4.70	6.40
More than 100,000 visitors	10.63	5.63	4.28
	Median Ticket Price, €	Median Retail Spend, €	Median F&B Spend, €
100,000 or fewer visitors	9.10	2.66	5.41
More than 100,000 visitors	8.63	2.63	3.63

**Table 4: Average Ticket, Retail and Food & Beverage Sales per Visitor
- by Category of Attraction**

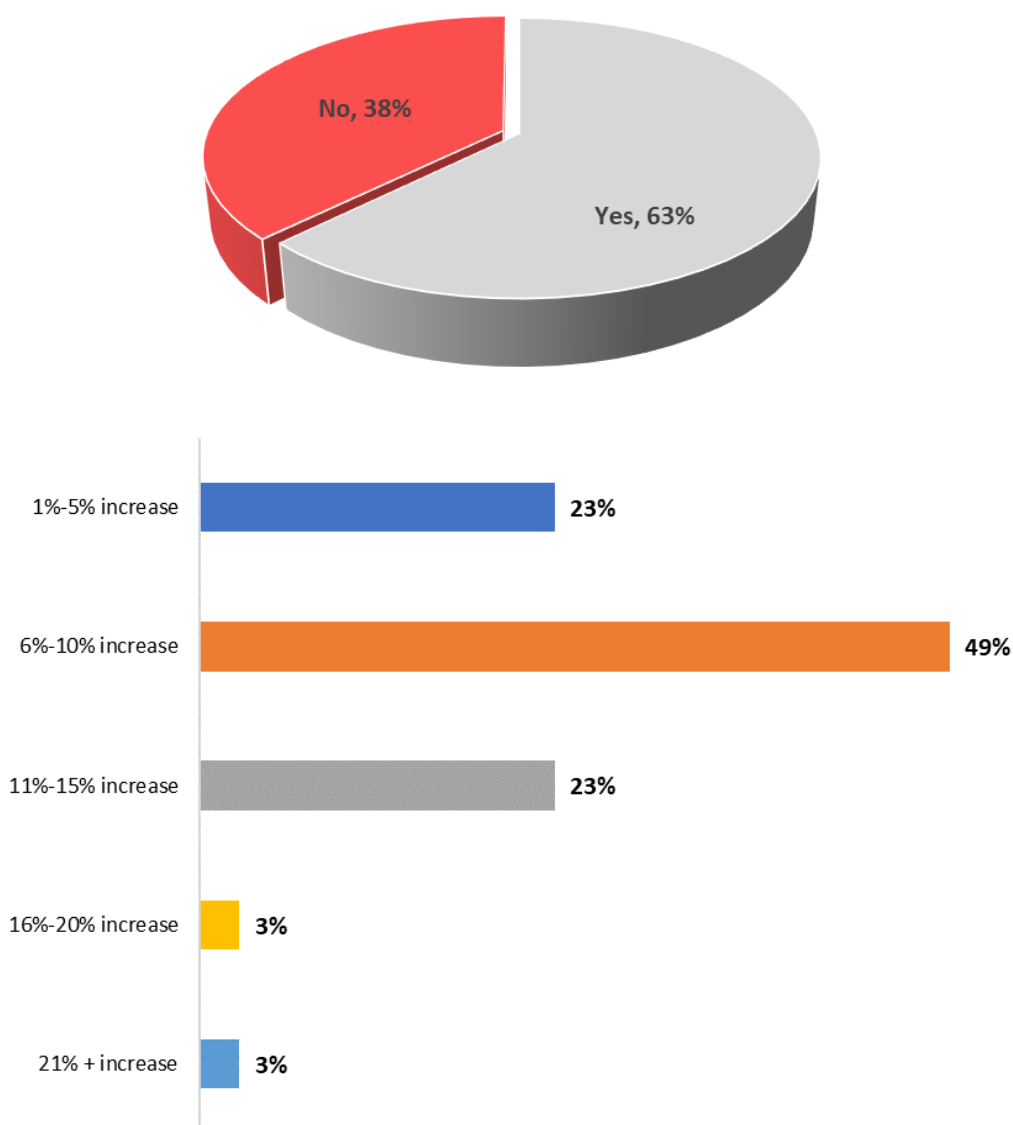
	Historic sites €	Visitor heritage centre /museum/gallery €	Brand experience €	Other €
Ticketing (av. price)	8.46	8.47	15.85	13.98
Retail sales (av. spend)	4.76	6.99	33.31	5.40
Café/restaurant (av. spend)	5.23	7.55	8.04	7.75

As shown in Table 4, historic sites have the lowest average sales per visitor in all three areas – tickets, retail and food & beverage - while brand experiences have by far the highest.

3.4 Ticket Price Increases

63% of respondents said they had increased their ticket prices in 2022 with the balance saying they had kept prices the same. Of those who did increase their ticket prices, almost three-quarters increased them by less than 10%, and the overall average was 9%. This average also applied both to Dublin and non-Dublin sites, and to sites receiving fewer than 100,000 visitors. Sites receiving more than 100,000 visitors reported an average 8.25% increase.

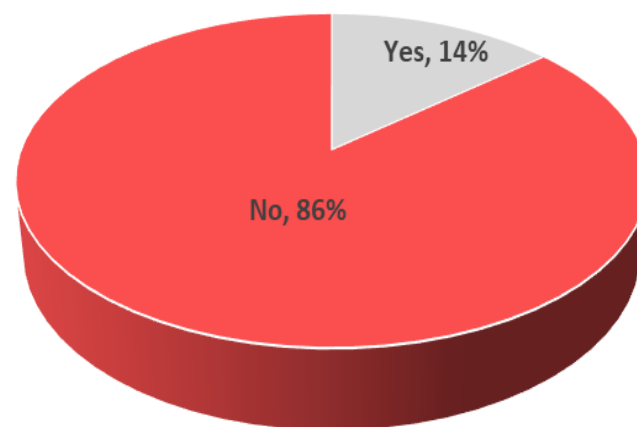
Figure 3.6: Ticket Price Increases



3.5 Variable Pricing

The majority (86%) of respondents said that they did not vary their pricing in response to demand peaks and troughs (e.g., higher prices for peak hours/days/months) with only 14% respondents stating that they did.

Figure 3.7: Variable Pricing

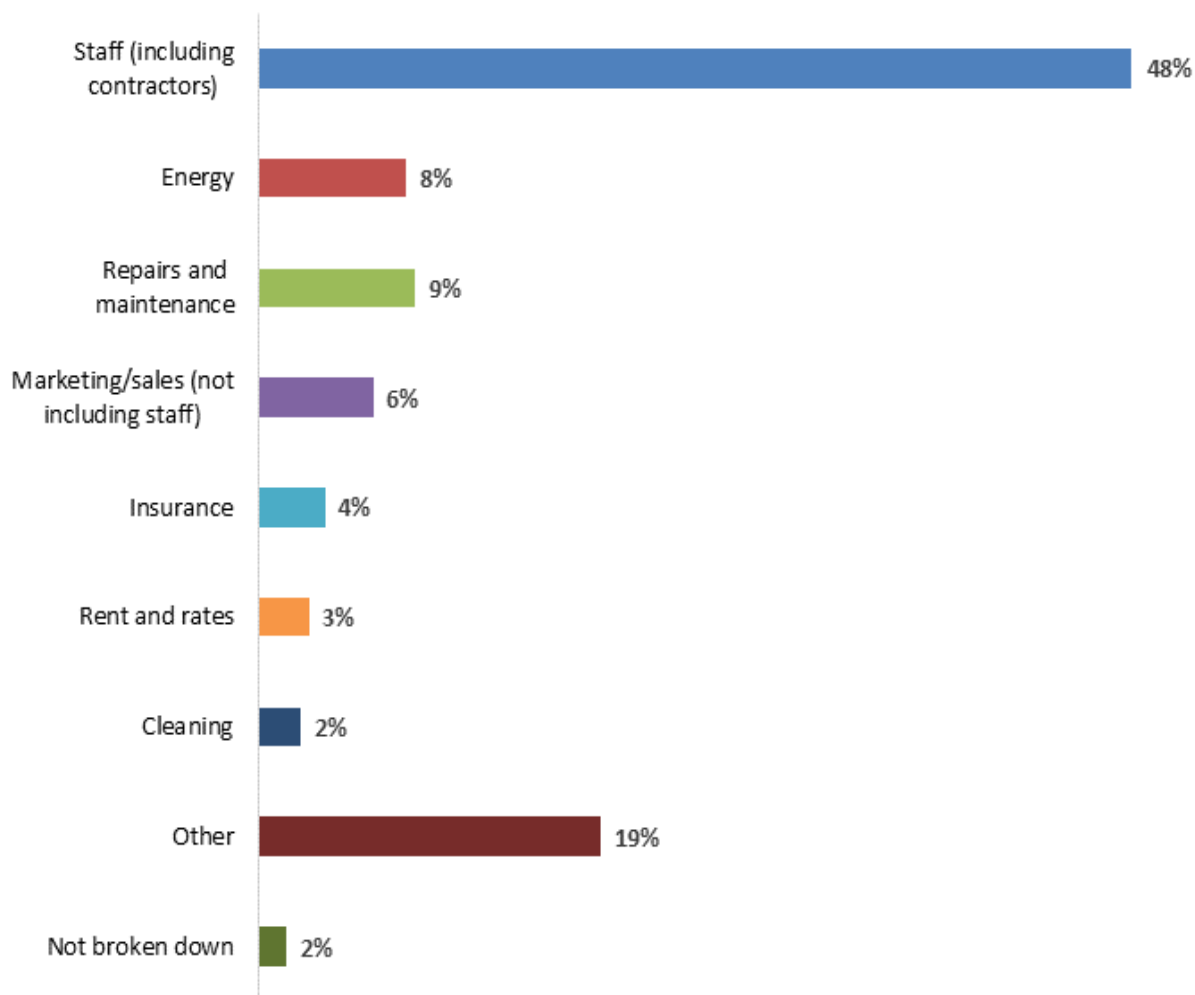


3.6 Breakdown of Operating Expenditure

A broad breakdown of operating costs was sought from respondents - staff (including contractors), marketing and sales (excluding staff), energy, insurance, rent and rates, repairs and maintenance and other operating costs. The results are shown in Figure 3.8.

Staff costs are the largest single item, followed by repairs and maintenance and energy. ‘Other’ covers numerous other costs including bank charges, training, recruitment, other utilities, equipment, legal, audit and archive fees, IT and computer costs, security, travel & subsistence, research and management, admin costs, professional fees etc.

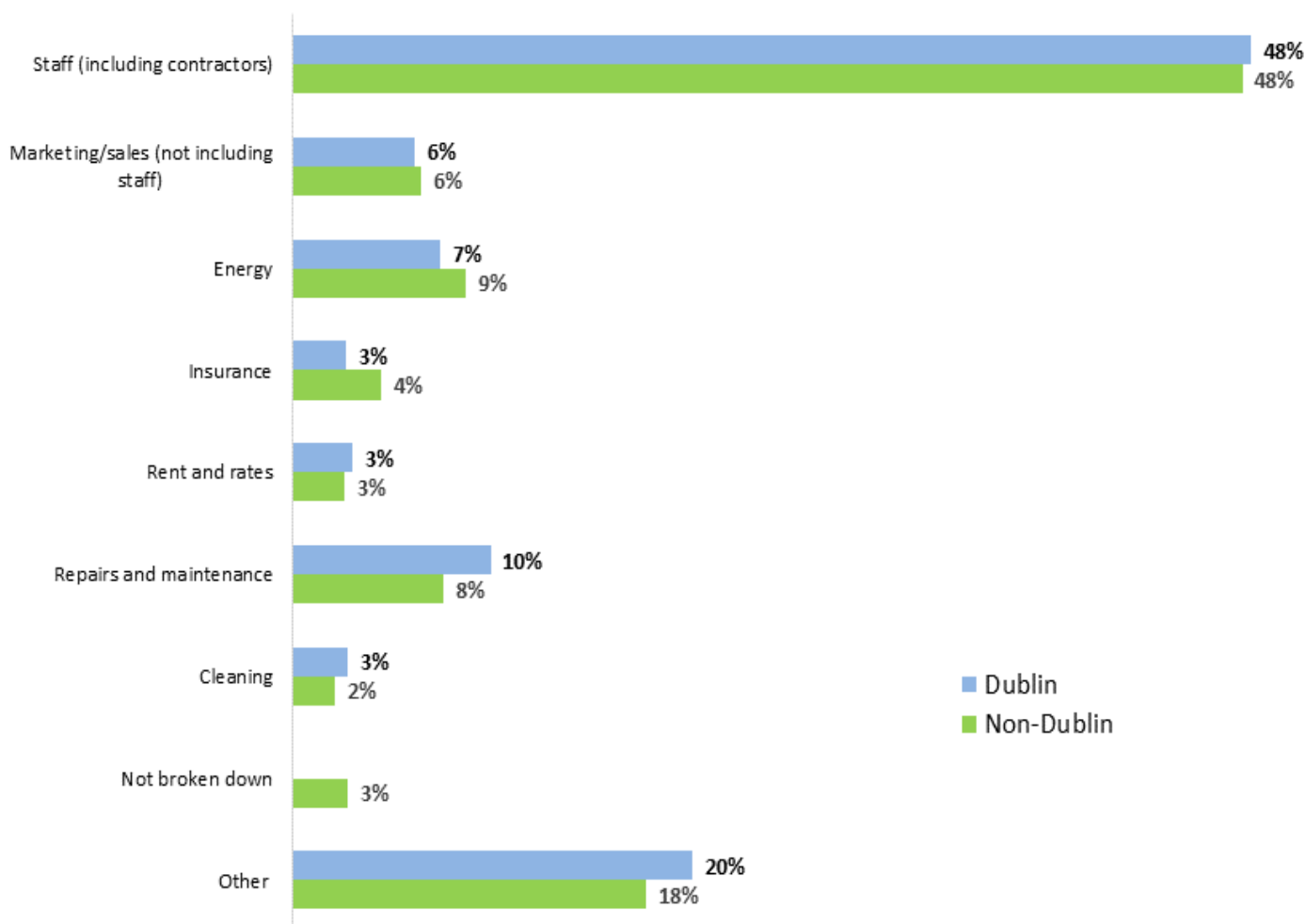
Figure 3.8: Breakdown of Operating Expenditure



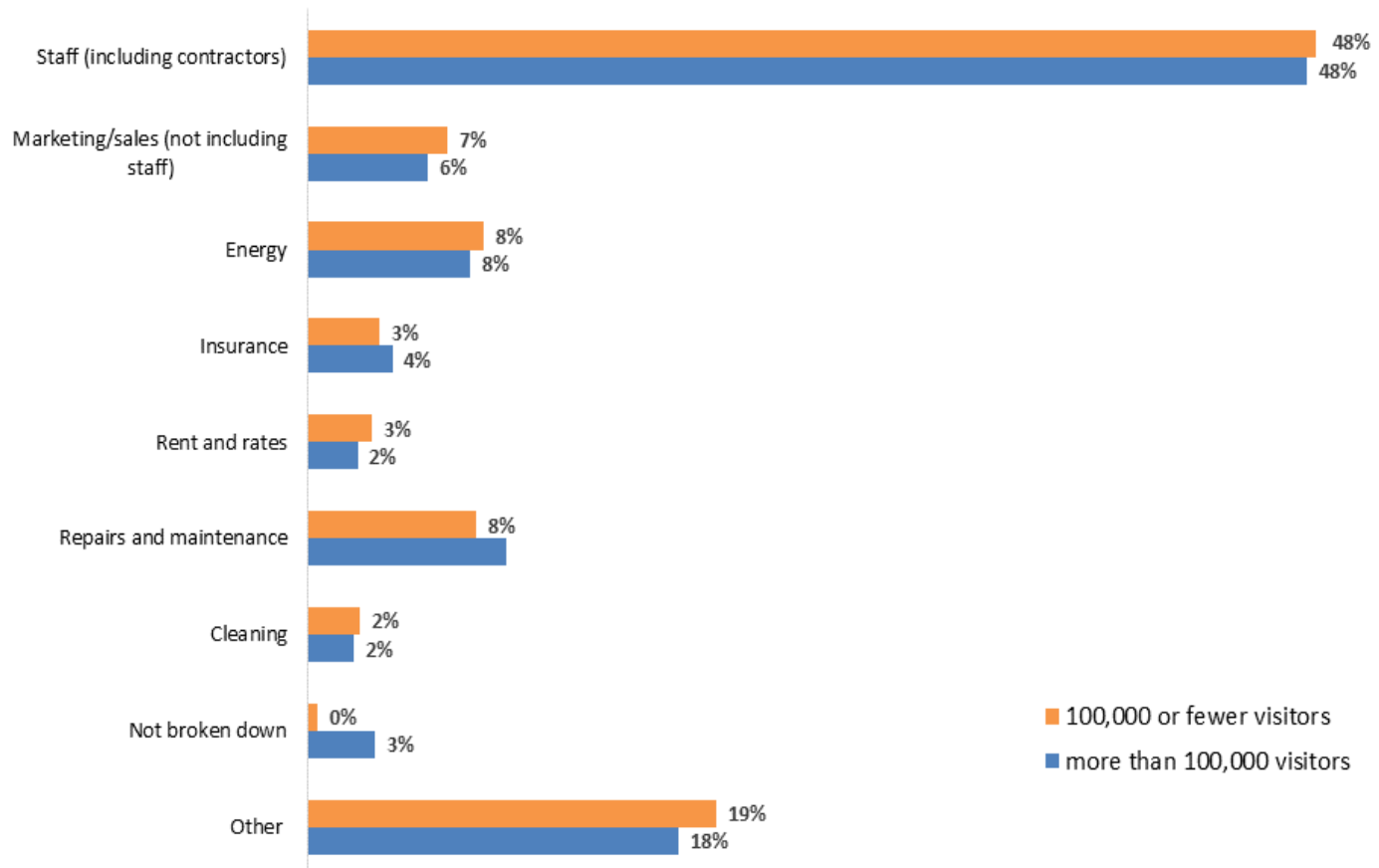
The majority of respondents reported an insurance cost range of between 1%-7% share of operating costs. A small percentage of sites are paying substantially more, amounting to as much as a 10%-16% share of total costs.

As shown in Figures 3.9 and 3.10, location and relative popularity have little impact on the distribution of operating costs by function.

Figure 3.9: Breakdown of Operating Expenditure – Dublin vs Non-Dublin



**Figure 3.10: Breakdown of Operating Expenditure
 – 100,000 or fewer visitors vs more than 100,000 visitors**



4. VISITORS

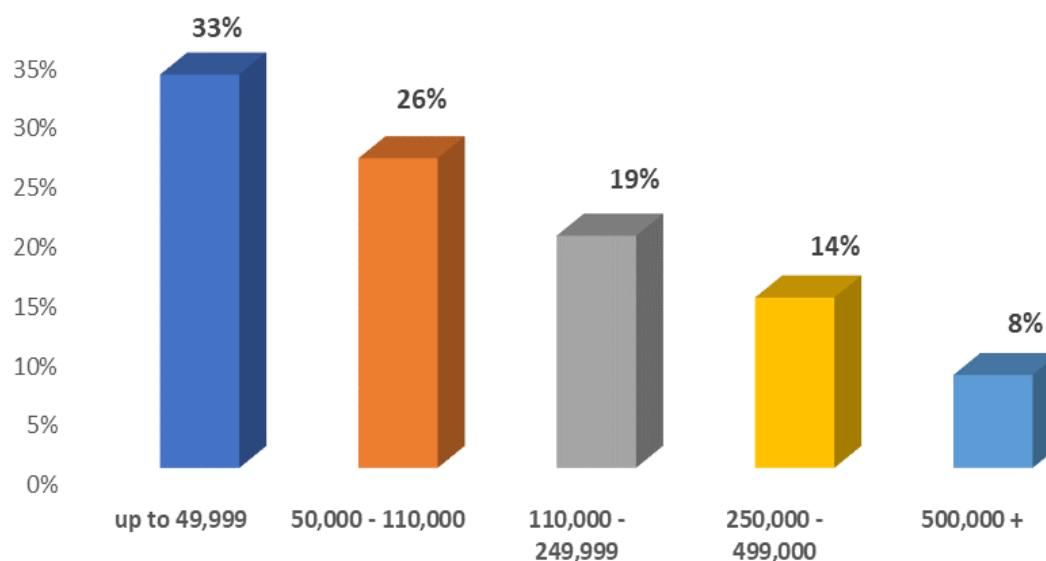
4.1 Number of Visitors Handled in 2022

The total number of in-person visitors for respondents in 2022 amounted to some **13.3 million visitors** (13,334,868). This compares to 4.3 million visitors recorded for 2021, and 22.9 million in 2019. While the composition of the sample of respondents is different and the 2022 figure shows that there is a recovery in progress, visitor numbers remained a long way off the peak of 2019. Some 54 attractions responded to both the 2019 and 2022 surveys, and their figures show that demand in 2022 was 22% below their 2019 total.

The distribution of survey respondents by scale of visitation in 2022 is shown in the following table and Figure 4.1 below:

Visitors	No. of Sites	%
Up to 49,999	25	33%
50,000 - 110,000	20	26%
110,000 - 249,999	15	19%
250,000 - 499,000	11	14%
500,000+	6	8%
Total	77	100%

Figure 4.1: Distribution of Respondents by Scale of Visitation



4.2 Origin of Visitors

The origin of visitors received by respondents in 2022 is detailed in Figure 4.2. The rank order of source markets in terms of admissions is essentially the same as in previous years. However, the share accounted for by the domestic market (including Northern Ireland) has fallen from 47% in 2019 to 43% in 2022 despite the fact that overall visitor numbers are much lower. Thus, there appears to have been a drop in domestic market demand for visitor attractions.

The shares of demand accounted for by overseas markets have arisen for all major markets except Britain. North America continued to be the second most important source of admissions after the domestic market.

Figure 4.2: Origin of Visitors by Source Market

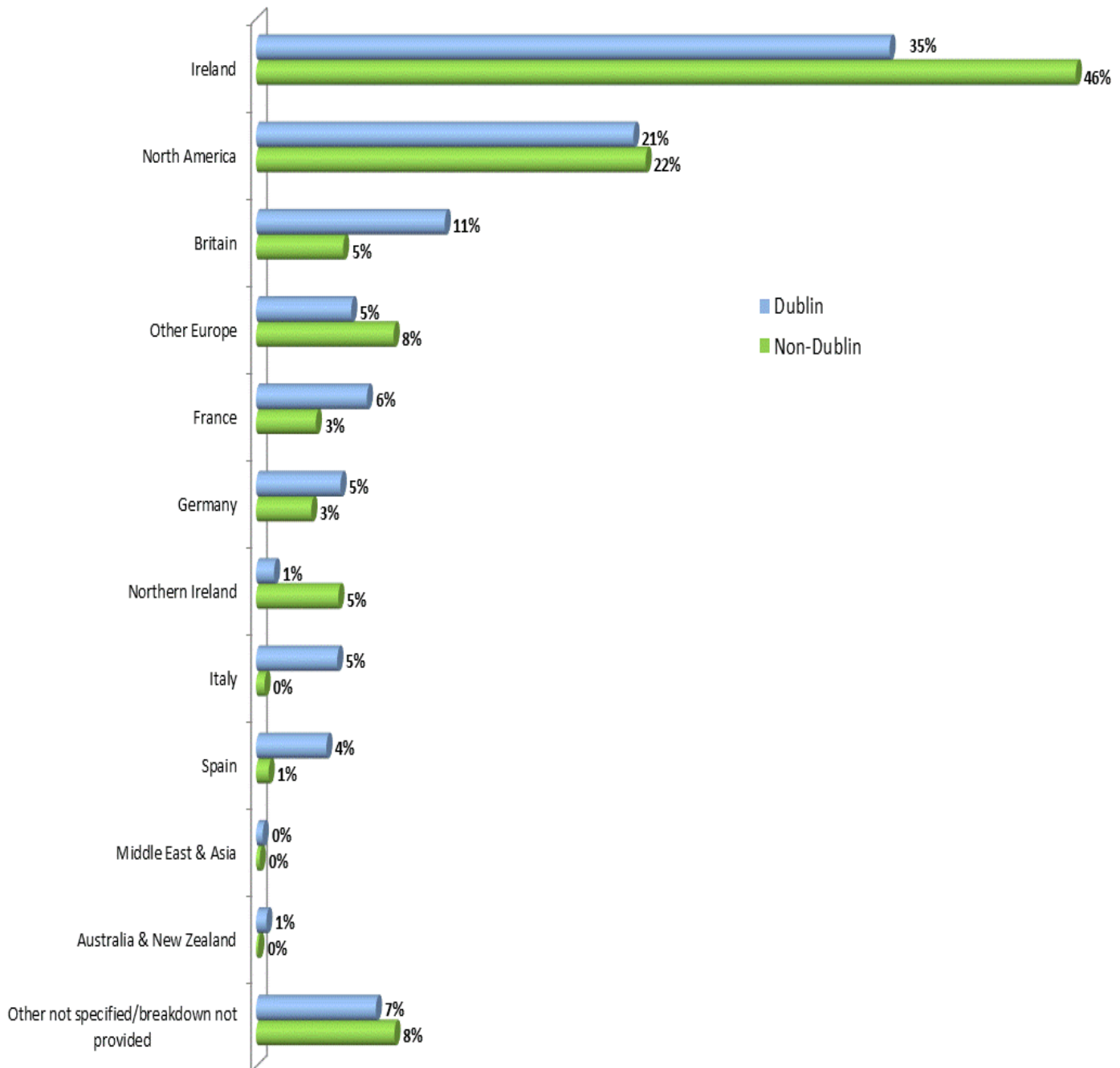


Figure 4.3 shows that attractions outside Dublin have a higher dependency on the domestic market although, in 2022, this was also the largest market for Dublin attractions. On the other hand, the latter receive significantly higher proportions of visitors from Britain, France, Italy and Spain markets than is the case for attractions outside Dublin.

Figure 4.3: Origin of Visitors by Source Market – Dublin vs Non-Dublin

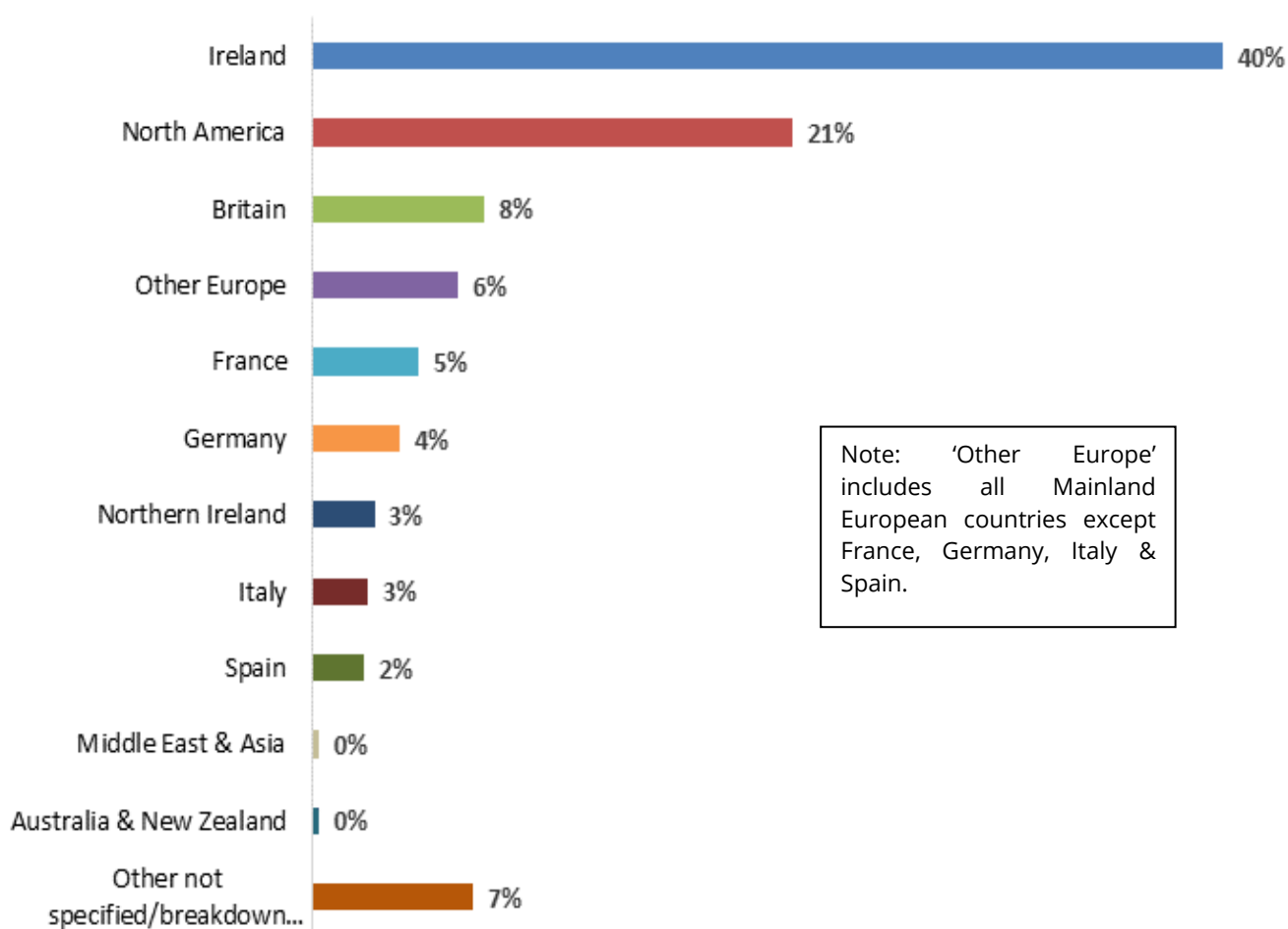


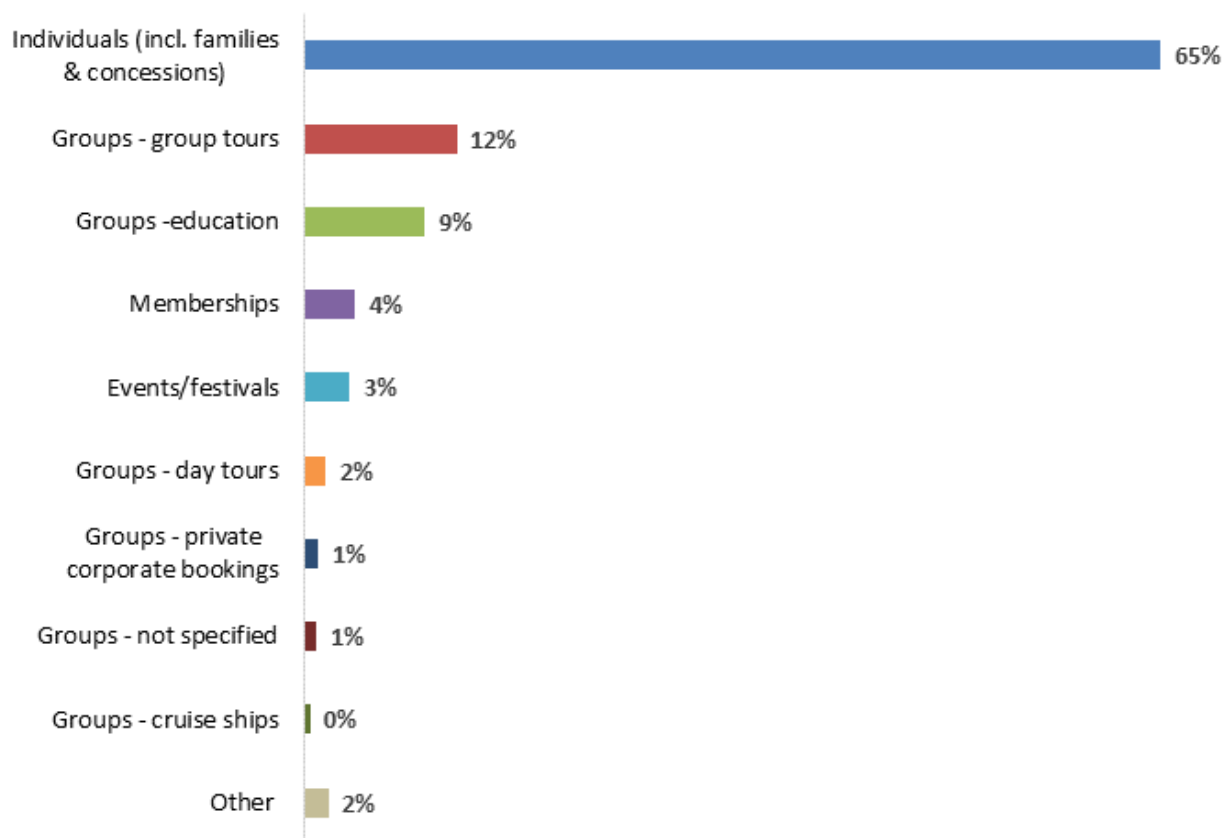
Figure 4.4: Origin of Visitors by Source Market – by Category of Attraction

Markets	Historic sites	Visitor heritage centre /museum/gallery	Brand experience	Other
Ireland	40%	48%	20%	47%
North America	19%	15%	33%	24%
Britain	4%	9%	18%	5%
Other Europe	9%	5%	5%	5%
France	5%	6%	5%	2%
Germany	4%	4%	5%	3%
Northern Ireland	1%	2%	0%	9%
Italy	3%	4%	2%	0%
Spain	3%	3%	2%	0%
Middle East & Asia	0%	0%	0%	0%
Australia & New Zealand	0%	0%	1%	0%
Other not specified/not given	11%	4%	8%	5%
	100%	100%	100%	100%

The distribution of demand by source market is broadly consistent across the main categories of attraction with the exception of brand experiences for which North America is the largest source followed by the domestic and British markets (Figure 4.4).

4.3 Visitor Ticket Categories

Figure 4.5: Distribution of Admissions by Ticket Category

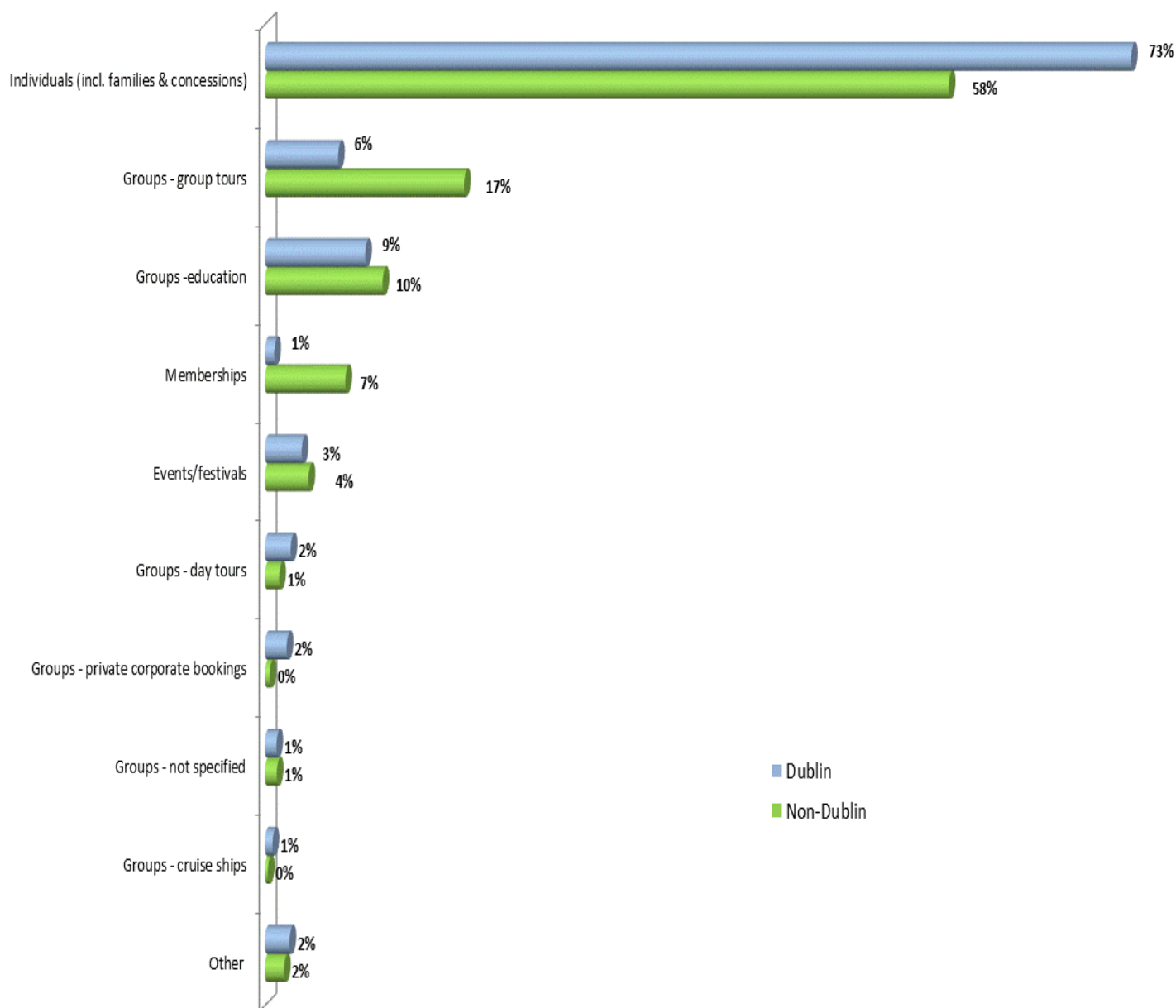


Almost two-thirds of all admissions to respondent attractions in 2022 purchased individual tickets. Not all were at full price - this category includes concessions (students, pensioners, etc.), families and children. The results for 2022 show a strong uplift in group admissions in 2022 over 2021 with total group admissions in 2022 accounting for some 25% of admissions in contrast to a little over 7% in 2021. The corresponding figure for group admissions in 2019 was 26%.

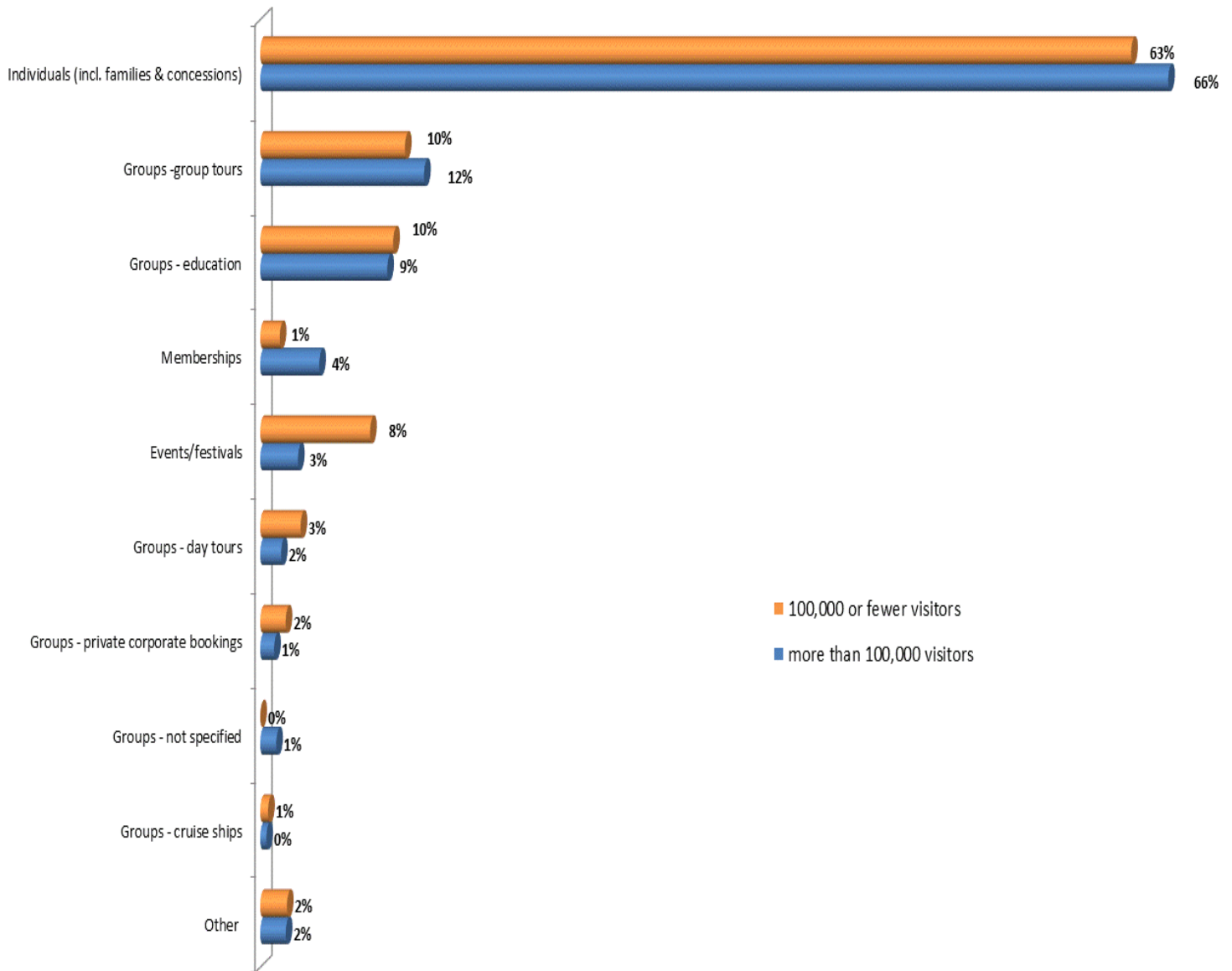
Groups are far more significant as a share of total admissions outside Dublin at 17% of the total compared to 6% in Dublin. Memberships are also more important as a source of admissions for attractions outside Dublin.

The distribution of admissions by ticket category is broadly the same for attractions receiving more than 100,000 visitors as for those receiving 100,000 or fewer visitors. Among the minor ticket categories, memberships are more important for the more popular attractions while events are more significant for attractions receiving fewer than 100,000 visitors.

**Figure 4.6: Distribution of Admissions by Ticket Category
- Dublin vs Non-Dublin**



**Figure 4.7: Distribution of Admissions by Ticket Category
 – 100,000 or fewer visitors vs more than 100,000 visitors**



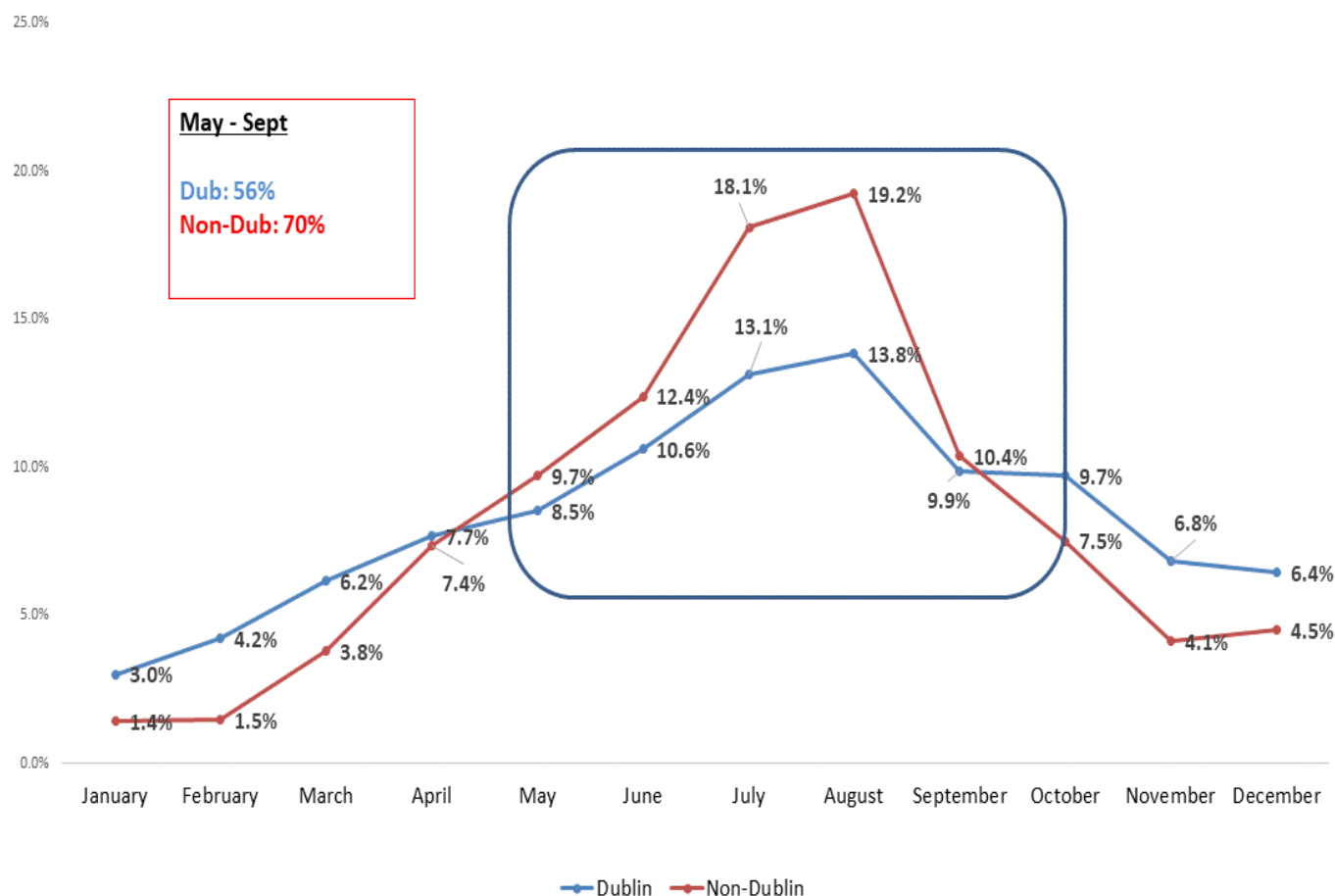
**Figure 4.8: Distribution of Admissions by Ticket Category
- by Category of Attraction**

Categories	Historic sites	Visitor heritage centre /museum/gallery	Brand experience	Other
Individuals (incl. families & concessions)	67%	51%	85%	63%
Groups - group tours	12%	17%	7%	11%
Groups -education	6%	13%	1%	16%
Memberships	6%	0%	0%	7%
Events/festivals	4%	8%	0%	1%
Groups - day tours	3%	2%	0%	1%
Groups - cruise ships	1%	0%	1%	0%
Groups - corporate bookings	1%	3%	1%	0%
Groups - not specified	0%	0%	5%	1%
Other	2%	5%	0%	1%
	100%	100%	100%	100%

The distribution of admissions by ticket type and category of attraction is detailed in Figure 4.8. While individuals, including families and concessions, are the dominant category, groups are particularly important for heritage centres, museums and galleries. On the other hand, groups constitute a relatively low share of admissions for brand experiences.

4.4 Seasonality

Figure 4.9: Seasonal Distribution of Admissions

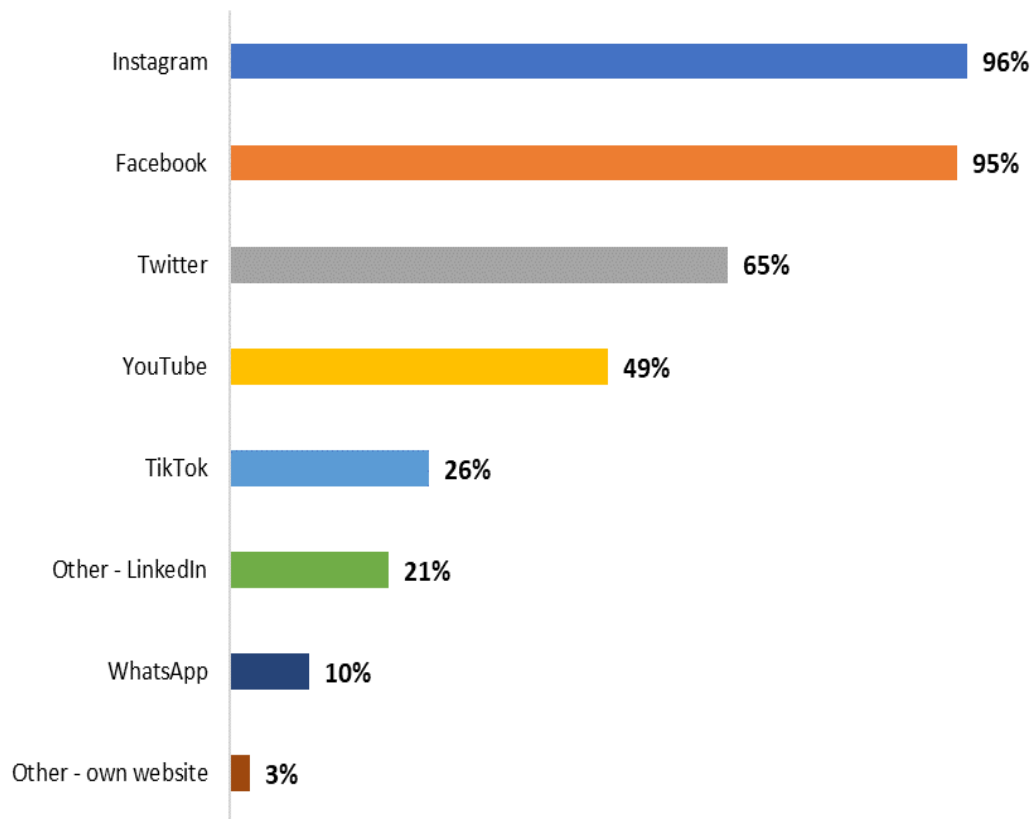


The seasonal pattern of admissions reflects the general seasonality of tourism in Ireland. As Figure 4.9 highlights, the seasonal peaking of demand during the summer months is much more pronounced at sites outside Dublin than at those in Dublin. While this reflects the greater off-peak flows in city break demand, the proportion of demand outside Dublin that was concentrated into the May-September period in 2022 (70%) was higher than in pre-Covid times (e.g. 59% in 2019). There was a relatively low level of demand outside Dublin in the early and late months of the year which arose due to a shorter average open season and slow build-up of overseas visitors.

4.5 Use and Importance of Social Media Channels

Figure 4.10 shows that Instagram and Facebook are by far the most frequently used channels of social media. LinkedIn was not included on the original list but was mentioned as another important channel. When asked to rank the various channels in order of importance, Facebook and Instagram were considered to be the most important.

Figure 4.10: Use of Social Media Channels



Rank

- 1 Facebook
- 2 Instagram
- 3 Twitter
- 4 YouTube
- 5 TikTok
- 6 LinkedIn
- 7 WhatsApp

5. YOUR STAFF

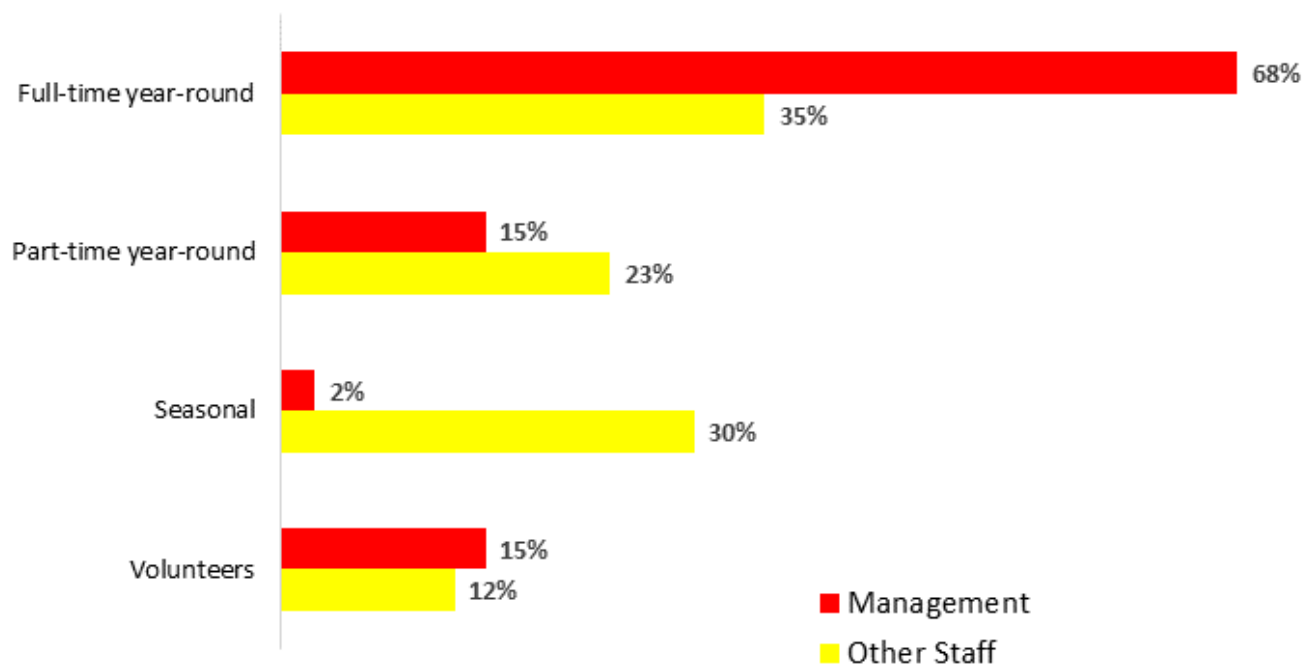
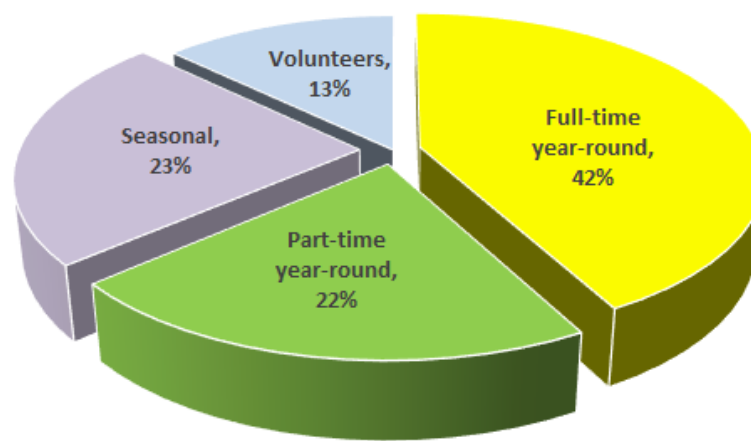
5.1 Number of Staff Employed

74 out of 78 survey respondents answered this question and together employed a total of 3,702 staff in 2022, an average of 50.0 per site. This is down from an average of 53.2 employees per site recorded in 2019. Some 42% of these staff are employed on a full-time year-round basis, with the balance divided between part-time year-round (22%), seasonal (23%) and volunteers (13%).

For 2022, respondents were asked to breakdown their staff complement further into Management and Other Staff, the results of which are shown overleaf. It shows that just over two-thirds of staff at 'Management' level are employed on a full-time year-round basis, compared to just over a third of 'Other Staff'.

Figure 5.1: Employment at Respondent Attractions

Total employed by Respondents: 3,702
(average of 50.0 per site)



5.2 Principal Obstacles to the Employment of New Staff in 2023

Respondents were asked to identify and rank the principal obstacles to the recruitment of new staff in 2022, The results are shown below with the three leading concerns being a lack of candidates, level of pay and seasonality of employment. The first of these factors is influenced by the next two, especially in a tight labour market.

Rank	
1	Lack of candidates
2	Pay
3	Seasonality of employment
4	Skill shortages
5	Working hours
6	Competition from other tourism businesses
7	Accommodation for staff

Other issues mentioned included:

- Financial / Budgetary issues
- Moratorium on hiring staff.

Dublin vs Non-Dublin Respondents

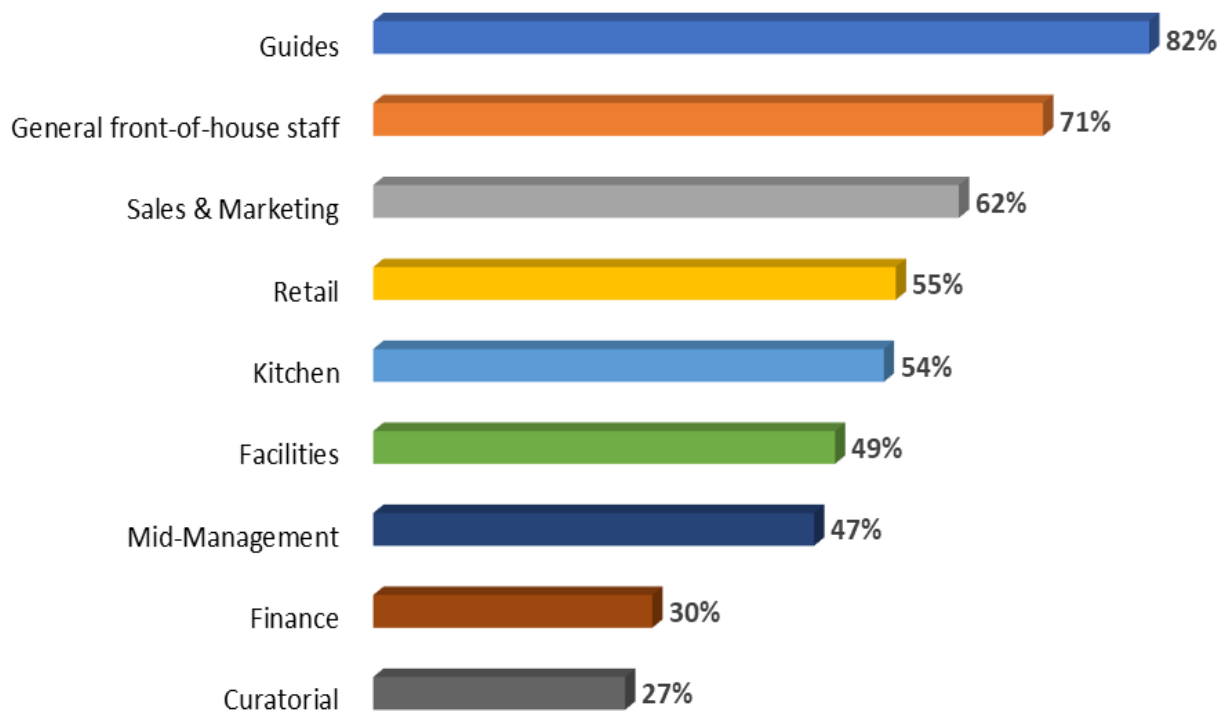
	Dublin Ranking	Non-Dublin Ranking
Lack of candidates	1	1
Pay	2	2
Seasonality of employment	7	3
Skill shortages	4	4
Working hours	3	5
Competition from other tourism businesses	5	6
Accommodation for staff	6	7

When analysed on a Dublin vs Non-Dublin basis, the difference between the two groups relates to seasonality of employment. While seasonality is the issue of least concern for Dublin based respondents, it is the 3rd most important issue for respondents based throughout the rest of the country.

5.3 Principal Needs regarding Recruitment of Staff in 2023

As shown in Figure 5.2, the areas of greatest need are at front-of-house - Guides and Front-of-House staff. High proportions of respondents have experienced difficulties recruiting staff for these positions. Shortages in these areas were much less severe in 2019.

Figure 5.2: Areas of Recruitment Need



5.4 Recruitment Channels Used

Respondents identified and ranked in terms of importance the recruitment channels that they use. Advertising and references are the most important followed by direct approach to potential candidates. Recruitment agencies are ranked 4th in importance, reflecting the fact that many sites do not use them or only use them for senior positions. The Community Services Programme (CSP) is an important channel for staff recruitment for many smaller attractions around the country.

Rank	
1	Advertising
2	References
3	Direct approach
4	Recruitment agency
5	CSP

Other channels mentioned included:

- Internally from within current organisation
- Local educational institutions & Erasmus programmes
- Social media
- Word of Mouth.

Dublin vs Non-Dublin Respondents

	Dublin Ranking	Non-Dublin Ranking
Advertising	1	1
References	2	2
Direct approach	4	3
Recruitment agency	3	4
CES	5	5

When analysed on a Dublin vs Non-Dublin basis, there is very little difference between the two groups.

6. ONLINE BOOKING SYSTEM

Online ticket sales have grown significantly as a share of overall ticket sales in recent years. The requirement to manage visitor numbers and bookings during the Covid-19 pandemic undoubtedly accelerated this trend. The following charts illustrate the extent to which respondents have introduced online booking systems, the status of their systems and integration with other systems. In brief, 85% of respondents have an online ticket sales capability and almost 30% of ticket sales were made through this channel in 2022. The survey of members in 2019 also found that 85% of respondents had an online ticket sales capability but, on average, just 17% of their ticket sales were made through this channel.

6.1 Online Booking System

Figure 6.1: Proportion of Sites with an Online Booking System

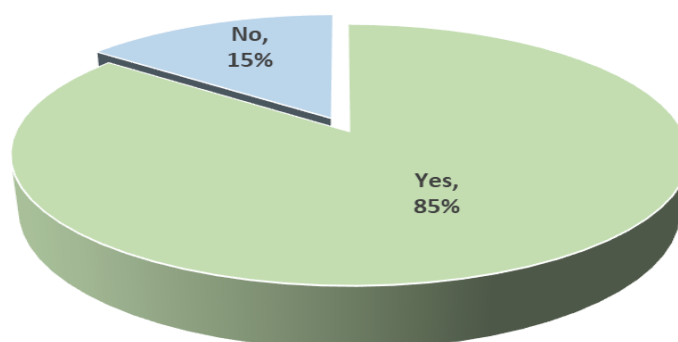
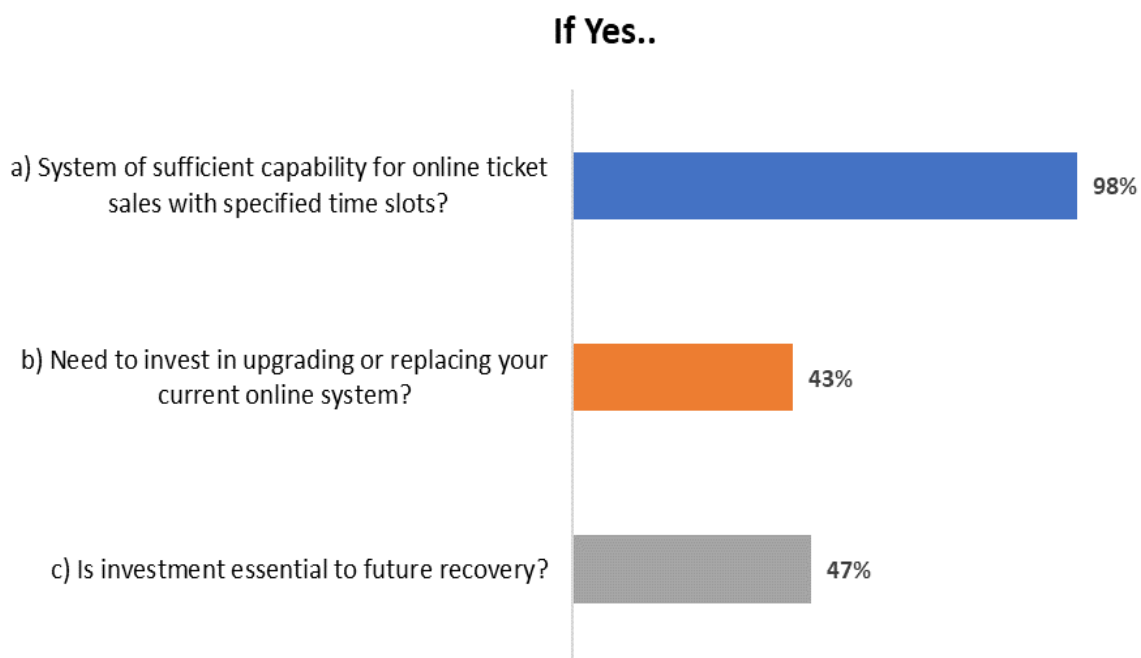
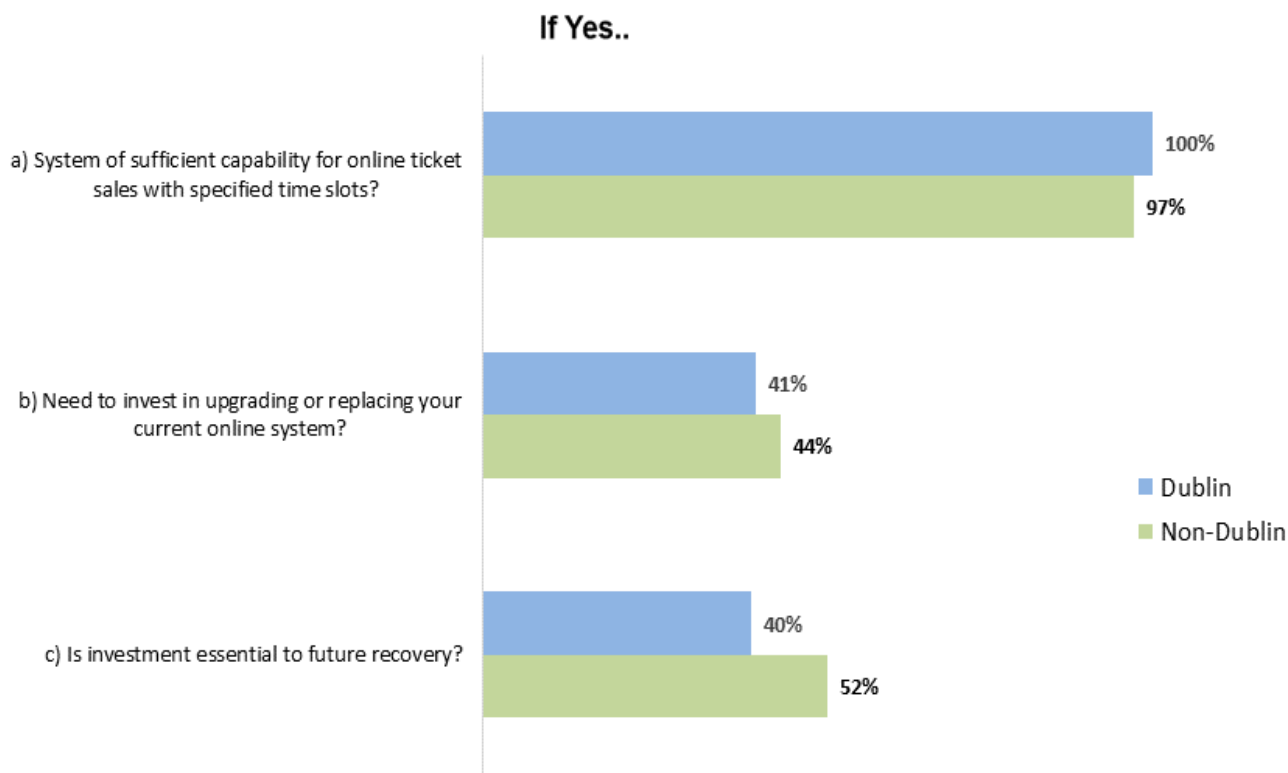


Figure 6.2: Status of Online Booking Systems – Dublin vs Non-Dublin



6.2 Engagement with Digital that Delivers

Two-thirds of respondents have engaged with Fáilte Ireland’s Digital that Delivers programme and have taken steps to improve their digital capability.

Figure 6.3: Engaged with Digital that Delivers

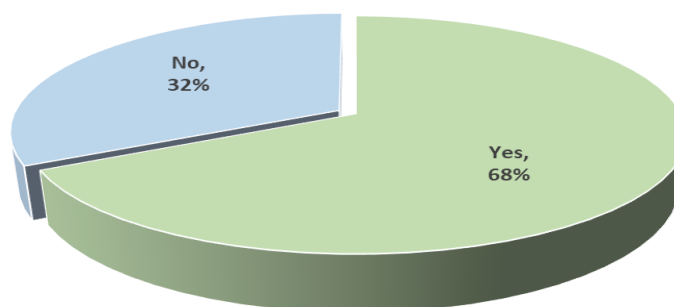
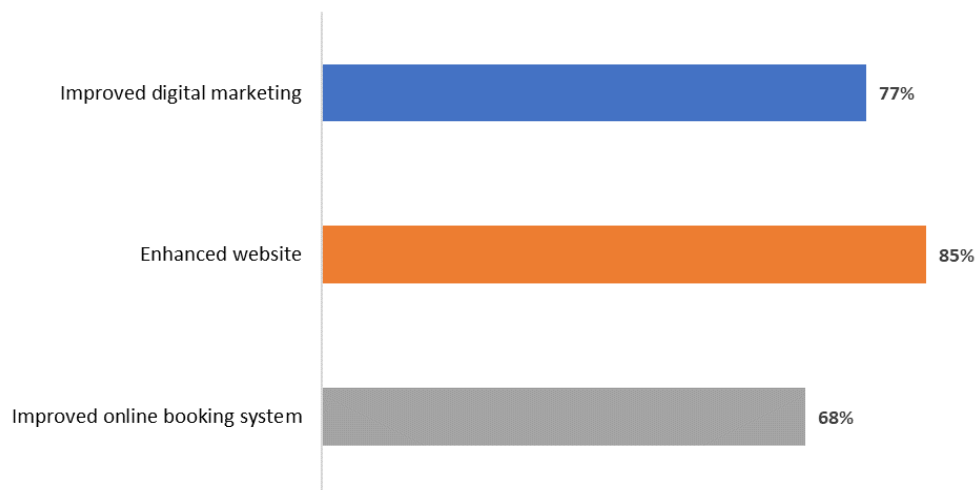


Figure 6.4: If you have engaged with Digital that Delivers, what steps have you taken to improve your digital capability?



Other steps mentioned were as follows:

- Better content being provided
- Connected distribution
- Better measurement and tracking
- Introduction of Geo conferencing, audio guides and QR code facilities
- Carrying out of a visitor experience audit.

6.3 Ticket Sales Systems

Figure 6.5: Ticketing System Integrated with other sales and marketing systems

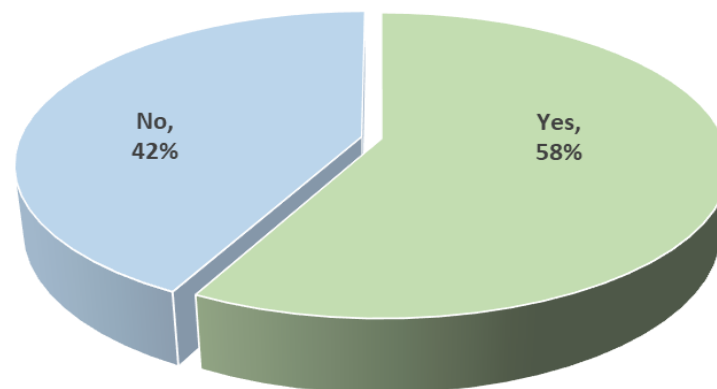
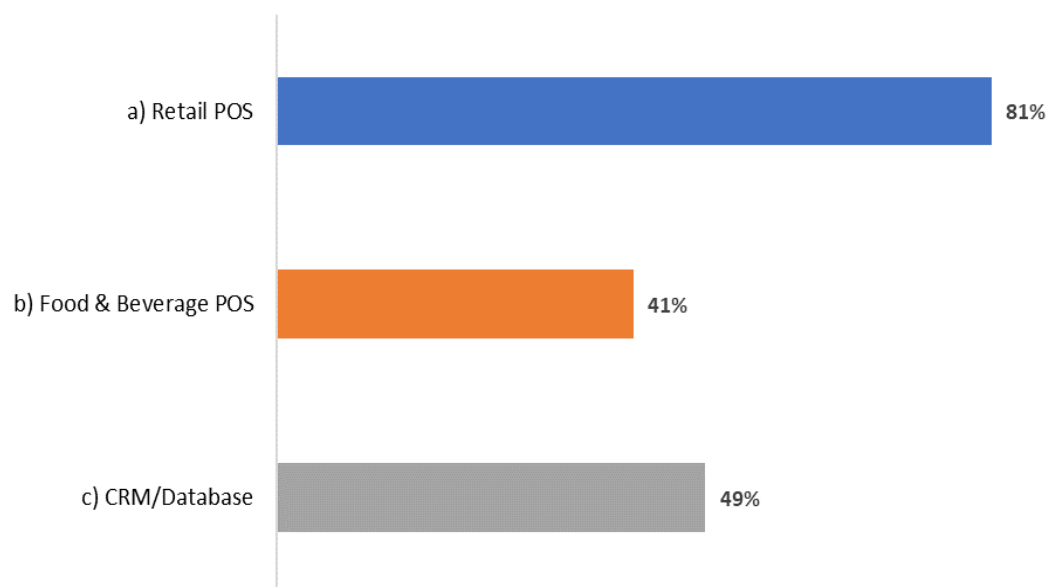


Figure 6.6: If Yes, which systems?



Other systems mentioned were as follows:

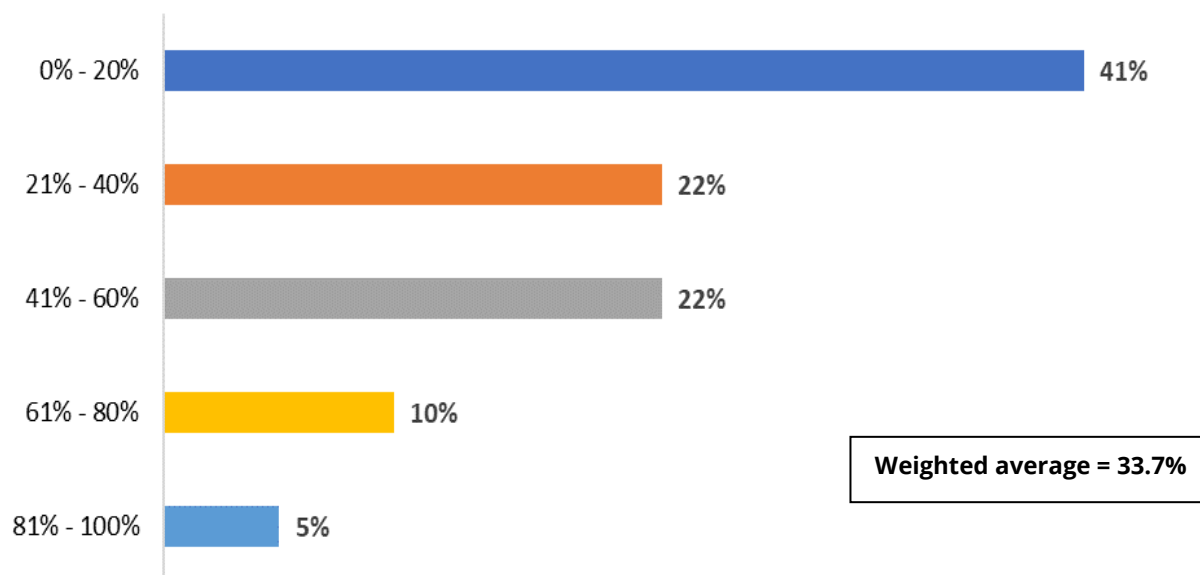
- Memberships & Vouchers
- Third party sellers
- Microsoft NAVs

6.4 Proportion of Tickets Sold Online

A high proportion of respondents (85%) have the capability to sell tickets online, but over 40% of these want to further upgrade their systems. The overall average share of tickets sold online was 34% in 2022 which was double the average of 17% recorded in 2019. The shift to online shopping and bookings during the Covid-19 pandemic contributed to this rapid growth, but it also reflects evolving consumer behaviour in general. Almost 90% of respondents expect this trend to continue.

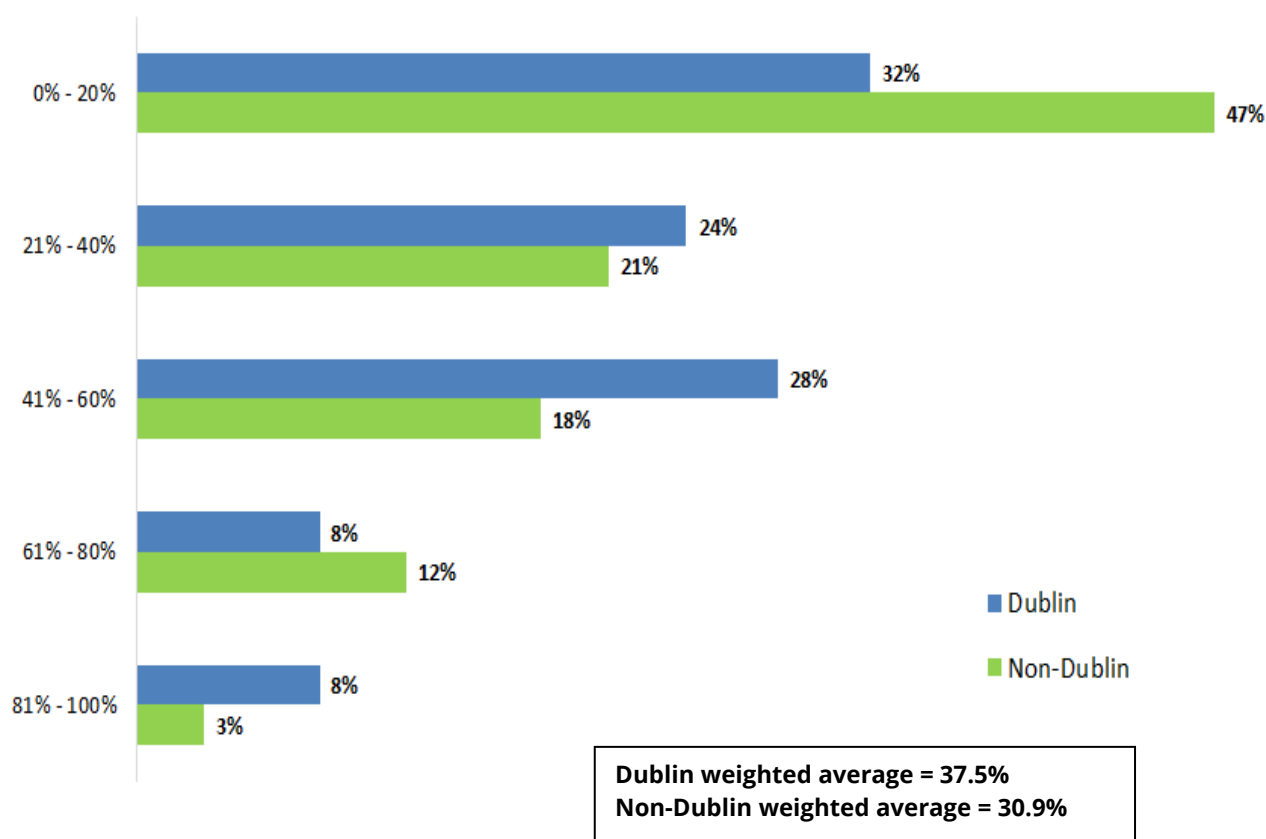
Range	Actual	%
0% - 20%	24	41%
21% - 40%	13	22%
41% - 60%	13	22%
61% - 80%	6	10%
81% - 100%	3	5%
Total	59	100%

Figure 6.7: What % of tickets did you sell online in 2022?



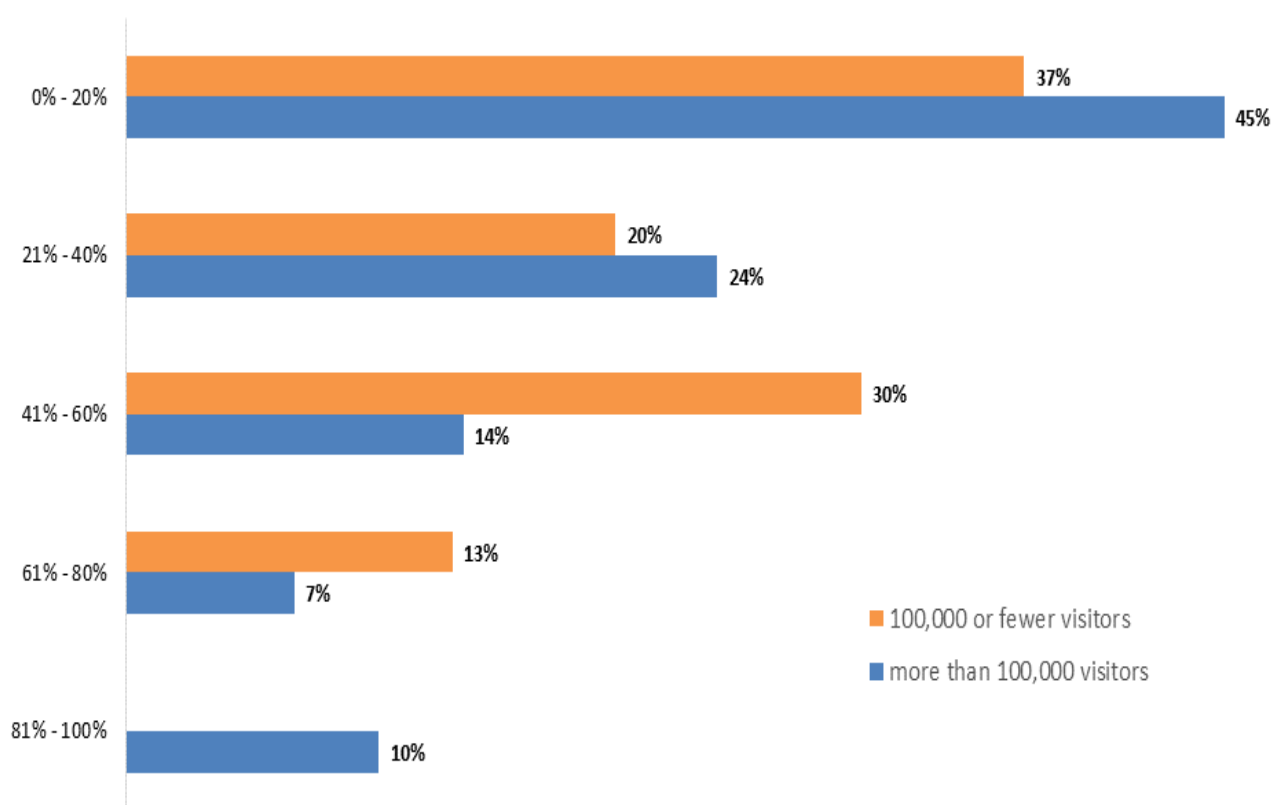
On average, sites in Dublin sell a higher proportion of tickets online than is the case with sites outside Dublin, as shown in Figure 6.8.

**Figure 6.8: What % of tickets did you sell online in 2022?
- Dublin vs Non-Dublin**



There is little difference between sites receiving fewer than 100,000 visitors and those receiving more than 100,000 with regard to the proportion of tickets sold online – around one-third of the total in both cases.

**Figure 6.9: What % of tickets did you sell online in 2022?
- 100,000 visitors or less vs more than 100,000 visitors**



100,000 or fewer visitors weighted average = 34.3%
more than 100,000 visitors weighted average = 33.0%

As Figure 6.10 illustrates, Brand Experiences and Other attractions made significantly higher proportions of their ticket sales online than was the case with Historic Sites and Heritage Centres, Museums and Galleries.

**Figure 6.10: What % of tickets did you sell online in 2022?
- by Category of Attraction**

Categories	Historic sites	Visitor heritage centre /museum/gallery	Brand experience	Other
0% - 20%	67%	53%	9%	21%
21% - 40%	19%	20%	18%	29%
41% - 60%	5%	20%	55%	21%
61% - 80%	5%	0%	18%	21%
81% - 100%	5%	7%	0%	7%
	100%	100%	100%	100%
Weighted average	22.6%	27.6%	46.8%	43.3%

Figure 6.11: Do you expect this to increase or decrease in 2023?



Almost 9 out of 10 respondents expect online sales of tickets to increase as a proportion of total sales. When asked why they expected online sales to **increase, decrease** or **remain the same**, the following were the main answers given:

Increase:

- Big increase in online bookings and migration to online platforms that anticipate will just become stronger; pushing online promotional codes for online discount initiatives (all in-person ticketing purchases are charged at full rate); answerphone message promotes online facility; increasing online allocations and reducing walk up availability; heavily incentivising online ticket sales through a variety of methods.
- New and improved websites and booking functionality has increased visibility and awareness.
- Increased assistance from and resulting benefits from Digital that Delivers has enabled us to maximise the system to our advantage and branch out into more sales channels with the system; provided us with a good base which we can now promote through online marketing activities and renewed digital marketing focus; maximising e-commerce offering.
- Changes in customer behaviour – people planning their itineraries more in advance and online systems facilitate this; increases in bookable tour products.
- Investment made in social media advertising and marketing; increased digital marketing spend, price differentiation and trend; better platforms.

- More effective marketing.
- Annual membership sales and renewals are increasingly online.
- More saleable experiences being offered and being made available online - will increase online sales.

Decrease:

- Seeing a return to pre-pandemic behaviours.
- Not enough online presence.
- Website out of date.
- People booking online now.

Stay the Same:

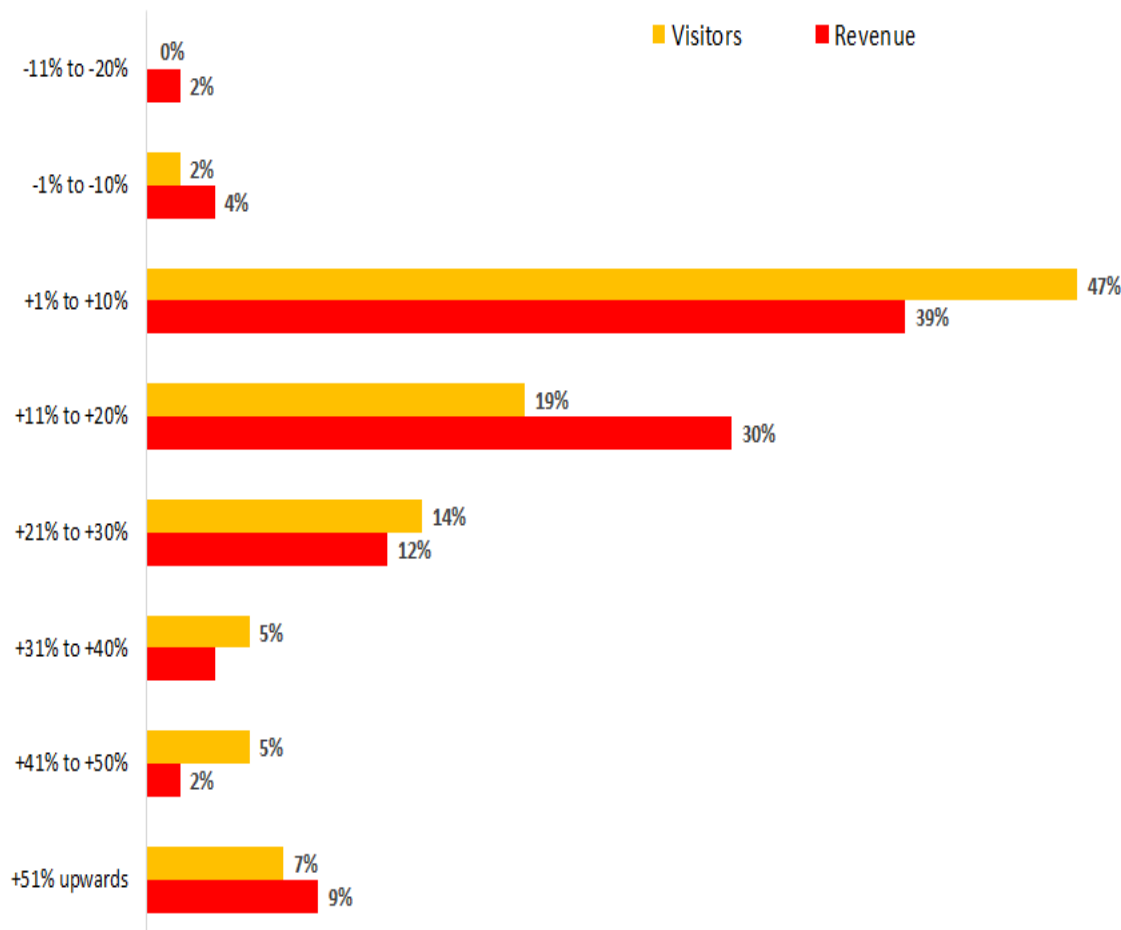
- Find people like to purchase as they arrive.
- Anticipate no change in online ticket sales for 2023.

7. FINAL OBSERVATIONS

7.1 'Best Guess' Projections

Looking ahead, 98% of respondents anticipate increased visitor numbers in 2023 with slightly fewer (94%) expecting increased revenue. The average scale of increase expected in both visitors and revenue is 17%. If demand in 2022 was 22% below the 2019 peak, as indicated by the comparison of performance across both years at some 54 sites, the anticipated growth in 2023 will leave the sector still a little short of that peak.

Figure 7.1: What is your 'best guess' projection for 2023 as a % of 2022 in terms of visitor numbers and revenue?



7.2 Key Factors Influencing Outlook for 2023

The key factors listed by respondents as those most important in influencing their outlook for 2023 were as follows:

- **Recovery of overseas markets and return of international visitors:** hopeful return to 2019 visitor numbers; relaxation of Covid restrictions and people being more comfortable to travel; strong USA market lead especially post President Biden’s visit; renewed optimism in markets; strong numbers from tour operators returning.
- **Concerns around the cost-of-living crisis and energy costs** and its overall impact on disposable discretionary spend; concerns we are losing our attractiveness as a country to visit - very worrying trend if continues. This will have a knock-on effect to the competitiveness of the Irish hospitality industry as a value-for-money destination and products; emphasis on sustainable and unique attractions; concerns around losing events to other locations.
- **Are re-opening various parts of sites that were closed in 2022** due to business changes, redevelopment/conservation works, reduced trading hours, repairs (e.g., cafés, retail, banqueting). Also includes newly open sites at an early stage of growth and who are building market awareness from a low base.
- **Availability of and cost of tourist accommodation** especially during the peak summer months may restrict growth in tourist numbers; Government contracts with hotels housing Ukrainian refugees are resulting in serious supply issues and shortages for the tourism industry.
- **Concentrating on a more focused marketing campaign** and putting more resources into building relationships through networking, more effective sales, proactive B2B sales, engagement with corporate clients and operators, and building brand awareness.
- **Staffing issues may hamper growth** due to diminished availability of trained and experienced staff including tour guides to meet the needs and expectations of visitors.
- **Active focus on growing revenues** though more effective price management by increasing admission rates, introducing dynamic pricing to increase rates and driving demand into off-peak

times; focusing on ways to grow each revenue stream in the business and paralleling this with cost control.

- **Positive economic outlook** which has driven early bookings and overall enquiries; good start to 2023 with very good feedback; a strong dollar encourages demand from the USA.
- **Improvements carried out in product quality and additional programming** at sites including introducing new experiences and guided tours will hopefully increase capacity, dwell times, interest and the quality of the overall visitor experience.
- **IT and booking system improvements** will enhance online visibility.
- **Access capacity growth** will bring more visitors to Ireland, especially for Dublin.
- **More business from domestic audiences**, domestic groups and day trippers following promotion during COVID - hoping this continues.
- **Higher operating costs** affected financial performance in 2022 – it is hoped that many of these were once off increases. There are concerns around wage inflation and removal of business supports, and the anticipated VAT increase to 13.5%
- **Pent up demand returning** - particularly from school tour/education market.
- **Car hire concerns** - availability, shortages and cost.
- **Stronger Ireland brand presence globally** will promote growth in demand from overseas, and there is a positive outlook for travel to Ireland and to Dublin in particular.

7.3 Priorities for AVEA for 2023/24

Advocacy, Lobbying and Leverage

- To act as the key liaison and advocate for the visitor attractions sector and to continue to be a voice for our industry in lobbying with Government, Fáilte Ireland and Tourism Ireland.
- We need AVEA to keep us to the forefront in all matters of concern relating to operating costs, such as retention of the 9% VAT rate for attractions, retention of low VAT rate on food, continuation of supporting grant schemes, and rising costs of doing business including the availability of insurance at reasonable rates.
- Lobby for increased marketing support for the sector.
- Continued lobbying for government supports for the non-accommodation tourist related businesses to ensure jobs are maintained in regional locations; break the link between attractions and F&B/Accommodation VAT rate.
- Lobbying for more tourist accommodation to be made available and highlighting the real impact that a lack of accommodation availability has on overseas visitors and the knock-on effects for AVEA members.
- Continue to promote our sector as a great place to work and to highlight the key role that visitor attractions make to the overall tourism industry.

Networking and Support

- Continue to inform and update members on industry trends and news, performances and opportunities, upcoming incentives etc. that may be available to them, especially since Covid.
- Continue to disseminate information regarding supports and training for the sector.
- Continued provision of conferences, workshops, educational visits and networking opportunities through meetings and events to encourage partnership opportunities and best practice sharing thus increasing the knowledge base of members and their staff.

- Explore cross-promotion and cost saving opportunities between members.
- Maintain excellent communication between members.
- Focus on attracting new members and continued growth of our sector.
- Continue to advise us on and raise awareness of new employment laws that we may not be aware of.

Training and Staff Issues

- Work to raise the profile of a professional career within the visitor attractions sector, putting confidence back into tourism as an attractive career.
- Support members in the recruitment of new staff through available schemes (e.g., CE, Tús) and working on sharing how we can best work to keep staff.
- Support with upskilling and training in the industry; assisting with access for more training opportunities for professional growth especially for junior-mid manager levels.
- Develop training opportunities where there are gaps currently in the Fáilte Ireland training framework.
- Assist with provision of on-site training options for members where, up to now, the cost and time involved to send staff off for training courses (e.g., barista, manual training etc.) has been prohibitive.

Sustainable Tourism Practices

- AVEA should focus on promoting sustainable tourism practices and engaging with local communities to ensure that tourism benefits everyone.
- Expand sector research to international best practice and standards.
- Sustainable tourism is becoming increasingly important to travellers and destinations that prioritise sustainability and implement sustainable tourism practices are likely to be more attractive.

- Identify and develop sustainable (financial/environmental) visitor experience models.

Digital Capabilities and Financial Supports

- Provide research on and support for digital transformation/enablement for members.
- Focus on leveraging technology and innovation to enhance the destination experience.
- Assist with/advise on with operational cost management needed to enable attractions to keep admission prices attractive.
- Assist with/advise on energy subsidy support measures – a version of the Business Continuity Fund.

Appreciation for AVEA

- Continue with the excellent support and information gathering and communication being given to members and the strong advocacy role that AVEA is playing to date.

8. APPENDICES

Appendix 1:

List of Members 2022/23

A1. LIST OF MEMBERS 2022/23

			
MEMBERS 2022/23			
No.	Attraction	No.	Attraction
1	14 Henrietta Street	54	Kilmainham Gaol
2	1798 Centre Enniscorthy	55	King John's Castle
3	Abbey Theatre	56	Kylemore Abbey & Gardens
4	Adare Heritage Centre	57	Lough Boora Discovery Park
5	Aillwee Cave and Birds of Prey Centre	58	Lough Gur Heritage Centre
6	Airfield	59	Lough Key Forest & Activity Park
7	Ardgillan Castle	60	Malahide Castle & Gardens
8	Avoca Mill	61	Medieval Mile Museum
9	Beyond the Trees Avondale	62	Mount Congreve Estate
10	Birr Castle Gardens & Science Centre	63	MoLI - Museum of Literature Ireland
11	Brú na Boínne - Newgrange	64	Nano Nagle Place
12	Book of Kells - Trinity College	65	National Botanic Gardens
13	Bunratty Castle	66	National Gallery of Ireland
14	Butler House	67	National Leprechaun Museum of Ireland
15	Canal Boat Restaurant	68	National Library of Ireland
16	Castletown House	69	National Museum of Ireland - Country Life
17	Chester Beatty	70	National Museum of Ireland - Decorate Arts & History
18	Christ Church Cathedral Dublin	71	National Museum of Ireland - Natural History
19	Cliffs of Moher Visitor Experience	72	Newbridge House
20	Clondalkin Round Tower	73	Newbridge Silverware
21	Cobh Heritage Centre - The Queenstown Story	74	Oakfield Park
22	Dalkey Castle & Heritage Centre	75	Patrick Kavanagh Centre
23	Donegal Castle	76	Pearse Lyons Distillery
24	Doolin Cave	77	Phoenix Park Visitor Centre
25	Doolin2Aran Ferries	78	Powerscourt Distillery
26	Dublin Castle	79	Powerscourt Estate & Gardens
27	Dublin Discovered Boat Tours	80	Rediscovery Centre
28	Dublinia	81	Rock of Cashel
29	Dún Aonghusa	82	Roe & Co
30	Dunbrody Famine Ship	83	Rothe House Museum & Gardens
31	EPIC - The Irish Emigration Museum	84	Russborough House & Parklands
32	Fota House, Arboretum and Gardens	85	Saint Patrick's Cathedral
33	Foxford Woollen Mills	86	SEA Life Bray
34	Foynes Flying Boat Museum	87	Skerries Mills
35	GAA Museum & Croke Park Tours	88	Slane Castle
36	Game of Thrones Studio Tour	89	Slane Distillery
37	Glasnevin Cemetery Museum	90	Sliabh Liag Visitor Centre
38	GPO Witness History	91	Spike Island
39	Guinness Storehouse	92	Strokestown Park House & National Famine Museum
40	Hook Heritage	93	Smithwick's Experience
41	House of Waterford Crystal	94	Swords Castle
42	Hugh Lane Gallery	95	Tayto Park
43	Irish National Heritage Park	96	Teeling Whiskey Distillery
44	Irish National Stud & Gardens	97	The Shed Distillery of PJ Rigney
45	Irish Museum of Modern Art - IMMA	98	Titanic Experience Cobh
46	Irish Whiskey Museum	99	Valentia Lighthouse
47	Jameson Distillery Bow St.	100	Waterford Treasures
48	Jameson Distillery Midleton	101	Wells House & Gardens
49	Johnstown Castle Estate, Museum & Gardens	102	Westport House
50	Kilbeggan Distillery and Visitor Centre	103	Wicklow Gaol
51	Kilkenny Castle	104	Windmill Lane Recording Studios
52	Kilkenny Civic Trust	105	Youghal Clock Gate Tower
53	Killary Fjord Boat Tours	106	St. Canice's Cathedral and Round Tower

Appendix 2:

Survey Questionnaire

A2. SURVEY QUESTIONNAIRE



FINAL



ASSOCIATION OF VISITOR EXPERIENCES & ATTRACTIONS

Survey of Business Performance 2022

This confidential survey is being conducted by CHL Consulting Co. Ltd. on behalf of the Association of Visitor Experiences & Attractions (AVEA). The purpose of the survey is to gather core information on the business operations of AVEA members in 2022. The findings of the survey will enable AVEA to represent the interests of its members more effectively and to influence external bodies including Fáilte Ireland, the Department of Tourism, Culture, Arts, Gaeltacht, Sports & Media, and ITIC. It will also enable members to benchmark their experience of 2022 against that of the industry as a whole. Your input is vital. The survey is strictly confidential. CHL will not release completed questionnaires or their content to any other person or organisation under any circumstances. The findings will be aggregated in our analysis and our report will not identify any individual or company.

Please complete this Excel survey and Save As an Excel file with the name of your Organisation, and return it directly by email to smcmahon@chl.ie by **Tuesday, 9th May 2023, 2pm**. Please contact Michael Coughlan (tel: 087 250 5679 / mcounahan@chl.ie) or Siobhán McMahon at CHL (tel: 01 284 4760 / smcmahon@chl.ie) if you have any queries.

NOTE: ALL DATA PROVIDED SHOULD REFER TO THE YEAR 2022

- 1) Name of Visitor Experience/Attraction:
- 2) Questionnaire completed by:

ABOUT YOUR ATTRACTION

3) Location: City / Town _____ County _____

4) What category of attraction are you? (please insert 'X' in the appropriate box)

Historic site	Natural attraction
Visitor heritage centre	Brand experience
Museum/gallery	Heritage park, leisure & theme park
Visitor garden	Other (please specify) _____
Zoo, aquarium & open farm	

5) What kind of organisation are you? (please insert 'X' in the appropriate box)

Private limited company (for profit)	State body/local authority
Private limited company (not for profit/charitable status)	Other (please specify) _____

6) Do you have external contractors/concessionaires on-site? (please insert 'X' in the appropriate box)

Yes	No
-----	----

If Yes, for what functions? (please insert 'X' in the appropriate boxes)

Retail	Facilities management
Food & Beverage	Other (please specify) _____
Cleaning	

7) For how many weeks were you open to visitors in 2022? _____ weeks

8) Do you charge for admission? (please insert 'X' in the appropriate boxes)

Yes	No
-----	----

KEY FINANCIAL DATA	
9) What was your total revenue in 2022 (net of VAT)?	_____
10) What % of your revenue in 2022 came from the following sources?	_____
Source	% share of turnover
Ticket/Admission Sales	_____
Gift Shop	_____
Cafe/Restaurant	_____
Events & Festivals	_____
Private hires (corporate, weddings etc.)	_____
Concessions (café, retail etc.)	_____
Rental	_____
Parking Fees	_____
Annual Memberships	_____
Sponsorship	_____
Covid support grants	_____
Other grants (e.g. Community Service Programme)	_____
Gifts / donations	_____
Other (please specify)	_____
Total	0.0%
11) Ticketing: What was the average ticket sale price per visitor in 2022 (net of VAT)? (total ticket revenue divided by total no. of paying visitors)	_____
11a) Have you increased your ticket prices for 2023?	Yes _____ No _____
11b) If Yes - by what average percentage %	_____
12) Do you vary your pricing in response to demand peaks and troughs? (e.g. higher prices for peak hours/days/months)	Yes _____ No _____
13) Retail sales: what was the average retail spend per visitor in 2022 (net of VAT)? (total retail sales divided by total no. of visitors - including complimentary)	_____
14) Cafe/restaurant: what was the average food & beverage spend per visitor in 2022 (net of VAT)? (total food & beverage sales divided by total no. of visitors - including complimentary)	_____
15) What was the breakdown of your operating expenditure in 2022 across the following categories?	_____
Category	%
Staff (including contractors)	_____
Marketing / Sales (not including staff)	_____
Energy	_____
Insurance	_____
Rent and rates	_____
Repairs and maintenance	_____
Cleaning	_____
Other (please specify)	_____
Total	0.0%

YOUR STAFF

21) How many staff did you employ in 2022?

Category

Full-time year-round	
Part-time year-round	
Seasonal	
Volunteers	
Total	

Management

Other Staff

22) What are the principal obstacles to the employment of new staff in 2023?
(Please rank in order of importance from 1 - 8, where 1 is most important, and 8 is least important)

Obstacles

- Working hours
- Pay
- Availability of accommodation for staff
- Skill shortages
- Lack of candidates
- Competition from other tourism businesses
- Seasonality of employment
- Other (please specify)

23) What are your principal needs regarding recruitment of staff in 2023?
(Please insert 'X' in the appropriate boxes)

Staff Category

s) Finance	
b) Guides	
c) Kitchen	
d) Retail	
e) Facilities	
f) Mid-Management	
g) Sales & Marketing	
h) Curatorial	
i) General front-of-house staff	
j) Other (please specify)	

24) Please rank in order of importance the recruitment channels you use?
(where 1 is the most important etc.)

Channel

- Advertising
- Direct approach to prospective candidates
- References from existing staff
- Recruitment agency
- Community Employment Scheme
- Other (please specify)

ONLINE BOOKING SYSTEM	
25) Do you have an online booking system?	Yes <input type="checkbox"/> No <input type="checkbox"/>
25b) If Yes, <i>(please insert 'X' in the appropriate boxes)</i>	
a) Have you a system of sufficient capability for online ticket sales with specified time slots?	Yes <input type="checkbox"/> No <input type="checkbox"/>
b) Do you need to invest in upgrading or replacing your current online system?	Yes <input type="checkbox"/> No <input type="checkbox"/>
c) Is such investment essential to future recovery?	Yes <input type="checkbox"/> No <input type="checkbox"/>
26) Have you engaged with 'Digital that Delivers'?	Yes <input type="checkbox"/> No <input type="checkbox"/>
26b) If Yes, what steps have you taken to improve your digital capability? <i>(please insert 'X' in all that apply)</i>	
a) Improved digital marketing	<input type="checkbox"/>
b) Enhanced website	<input type="checkbox"/>
c) Improved online booking system	<input type="checkbox"/>
d) Other <i>(please specify)</i>	<input type="checkbox"/>
27) Is your ticket sales system integrated with other sales and marketing systems?	Yes <input type="checkbox"/> No <input type="checkbox"/>
27b) If Yes, which systems <i>(please insert 'X' in all that apply)</i>	
a) Retail POS	<input type="checkbox"/>
b) Food & Beverage POS	<input type="checkbox"/>
c) CRM/Database	<input type="checkbox"/>
d) Other <i>(please specify)</i>	<input type="checkbox"/>
28) What % of tickets did you sell online in 2022?	<input type="text"/>
29) Do you expect this to increase or decrease in 2023?	Increase <input type="checkbox"/> Decrease <input type="checkbox"/>
30) Why do you expect online sales to increase or decrease?	<input type="text"/>

FINAL OBSERVATIONS

Q1) What is your 'best guess' projection for 2023 as a percentage of 2022 in terms of:

- a) Increase/decrease in **visitor numbers** (insert % (+/-))
- b) Increase/decrease in **revenue** (insert % (+/-))

Yellow box with dashed lines for data entry.

Q2) What are the key factors influencing your outlook for 2023?

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Q3) What should AVEA's top 3 priorities be for 2023/24?

Large yellow box for text entry.

THANK YOU FOR YOUR TIME AND CO-OPERATION





ASSOCIATION OF VISITOR
EXPERIENCES & ATTRACTIONS

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