

SURVEY OF
MEMBERS' BUSINESS PERFORMANCE 2021



- Detailed Results -

September, 2022

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1. INTRODUCTION AND EXECUTIVE SUMMARY

1.1 Introduction

This report presents the findings of the fifth annual survey of AVEA's members with regard to their business performance over the previous year. This iteration of the survey covers 2021, taking into account the impact of Covid-19.

The survey questionnaire was issued to 91 AVEA members in January 2022. Responses were received from 53, representing a response rate of 58%. 21 of the respondent sites are in Dublin and 32 are spread throughout the rest of Ireland. 13 of the respondent sites are operated directly by State bodies and local authorities; the remainder are run by private entities, 21 of which are not-for-profit.

1.2 Executive Summary

- 1) In 2021, visitor attractions and experiences continued to operate under severe restrictions imposed under the COVID-19 pandemic. While these had eased a little compared with 2020, at 29 weeks, the average open season for survey respondents was only 4 weeks longer than in 2020 and far short of the average of 49 weeks recorded in 2019.
- 2) Reflecting the much reduced season and greatly reduced flow of overseas visitors, the number of admissions to respondent sites were less than a third of the total in 2019. However, numbers were up by 43% over the nadir of 2020.
- 3) Compared with 2019 and earlier years, the results for 2021 show a very large increase in the proportion of visitor from Ireland and a very steep drop in the proportion of visitors from overseas, especially from North America and Britain. Thus, in 2021, 63% of visitors to respondent sites were domestic in origin – the corresponding figure in 2019 was 47%. On the other hand, the share of North American visitors in the total dropped from over 19% in 2019 to just 7% in 2021.

- 4) The results for 2021 show a very steep drop in group admissions compared to 2019 and earlier years. Total group admissions in 2021 accounted for a little over 7% of all visitors in contrast to the 26% recorded in 2019.
- 5) In 2021, the share of revenue earned from ticket sales dropped to 43% from an average of 53% reported in 2019 and 2018. Retail and café sales maintained their share of revenue. However, there was an increase in the share of revenue accounted for by all other sources.
- 6) The survey findings show that there is, potentially, an average of between €19 and €24 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.
- 7) Ticket sales are by far the largest source of revenue although, in 2021, the share of revenue earned from ticket sales dropped to 43% from an average of 53% reported in 2019 and 2018. There was a small increase of just 6% in the average yield from ticket sales in 2021 despite the change in the visitor mix, notably a drop in tour group traffic. However, differences in sample composition may have affected this finding. Retail and café sales maintained their share of revenue. However, there was an increase in the share of revenue accounted for by all other sources.
- 8) Insurance costs continue to be an issue for many. 17 respondents had received their insurance renewal quote by the time of the survey. 13 (76%) of these were quoted an increased premium price, in many cases a substantial increase.
- 9) Total employment among the 40 respondents to this question over the 3 years fell by 24%. The survey findings show that the respondents placed greatest emphasis on retaining their full-time staff.

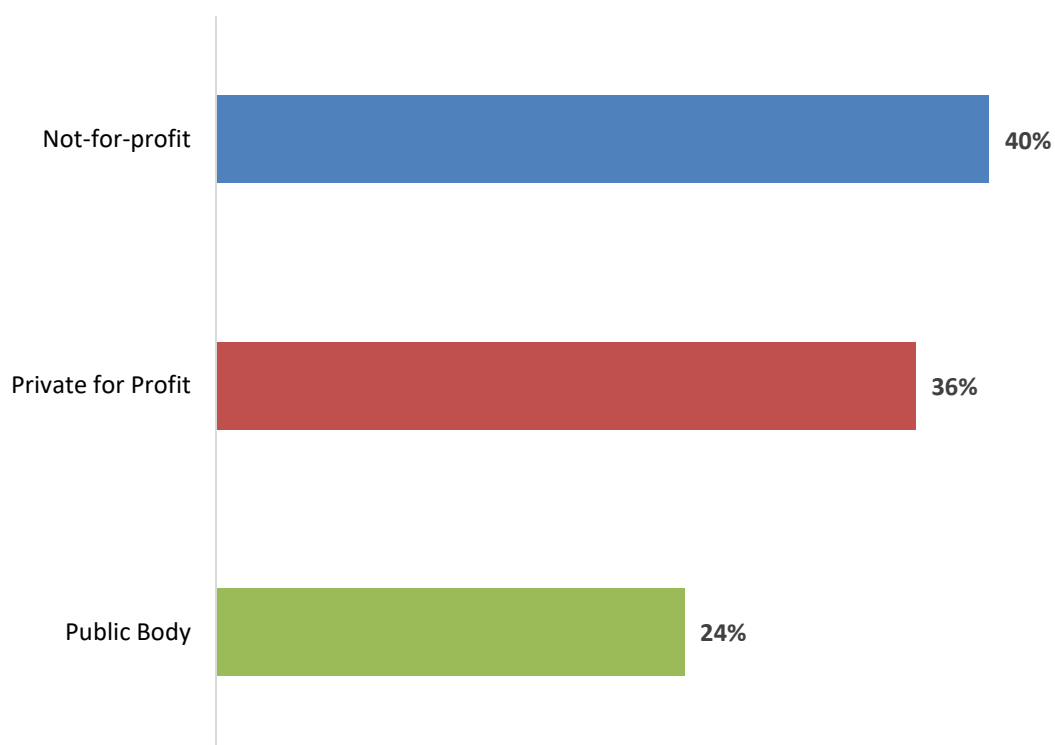
- 10) The areas of greatest need in recruitment are Guides and Retail staff. High proportions of respondents have experienced difficulties recruiting staff for these positions. Reflecting the shortages of front-of-house staff, the proportion of respondents citing skills deficiencies in customer service rose from 41% in 2019 to 83% in 2021.
- 11) Survey respondents availed of a wide range of COVID-19 business supports, the most widely accessed of which were the EWSS, CRSS, the Fáilte Ireland Business Continuity Scheme and rates relief. Most respondents sought to mitigate the impact of COVID-19 by introducing new means of engaging with visitors, including more outdoor activities, online retail and virtual tours.
- 12) Half of the respondents stated that their capital investment plans had changed as a result of the pandemic. For almost three-quarters of these, their planned investments were cut. This push back of capital investment may have a negative impact on the quality of the visitor experience at many sites in the short to medium term.
- 13) A high proportion of respondents (81%) have the capability to sell tickets online, but a substantial share of these want to further upgrade their systems. Almost 80% of respondents have engaged with Fáilte Ireland's Digital that Delivers programme.
- 14) Looking ahead, just over half of the respondents expect business in 2022 to show an improvement over 2021. For the majority, the improvement will represent an increase of less than 20% over 2021, which would still leave them quite some distance behind the results achieved in 2019.

2. SURVEY RESPONDENTS

2.1 Type of Organisation

40% of respondents are not-for-profit entities, which are mostly companies limited by guarantee. Many of these have charitable status. A further 36% are privately owned commercial operations. The balance of 24% of the respondents are owned and operated by the State and other public bodies, including local authorities.

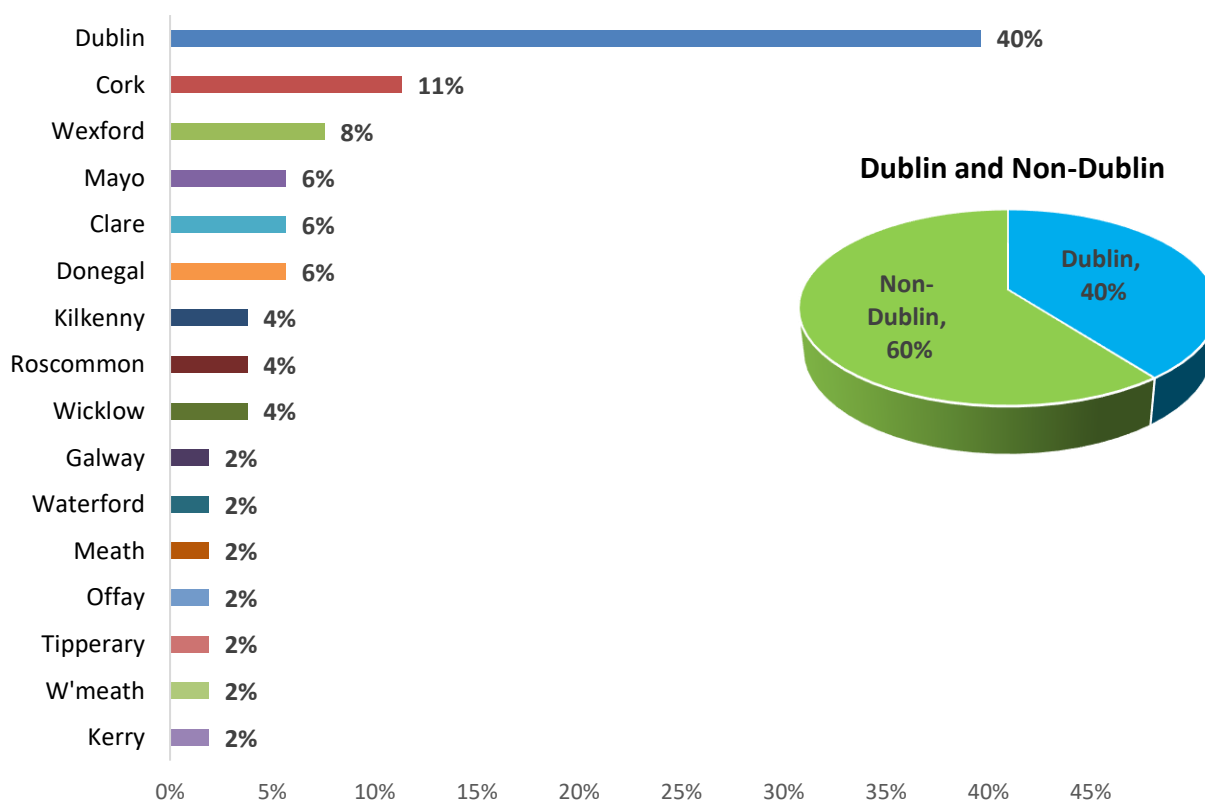
Figure 2.1: Distribution of Respondents by Organisation Type



2.2 Location

21 of the 53 respondents (40%) are based in Dublin. The remaining 32 are spread across some 15 other counties. This distribution is not representative of the overall distribution of attractions in Ireland - only 17% of the approximately 480 sites in the Republic of Ireland that receive more than 500 visitors a year are in Dublin - but it is perhaps a reflection of the concentration of larger attractions in Dublin.

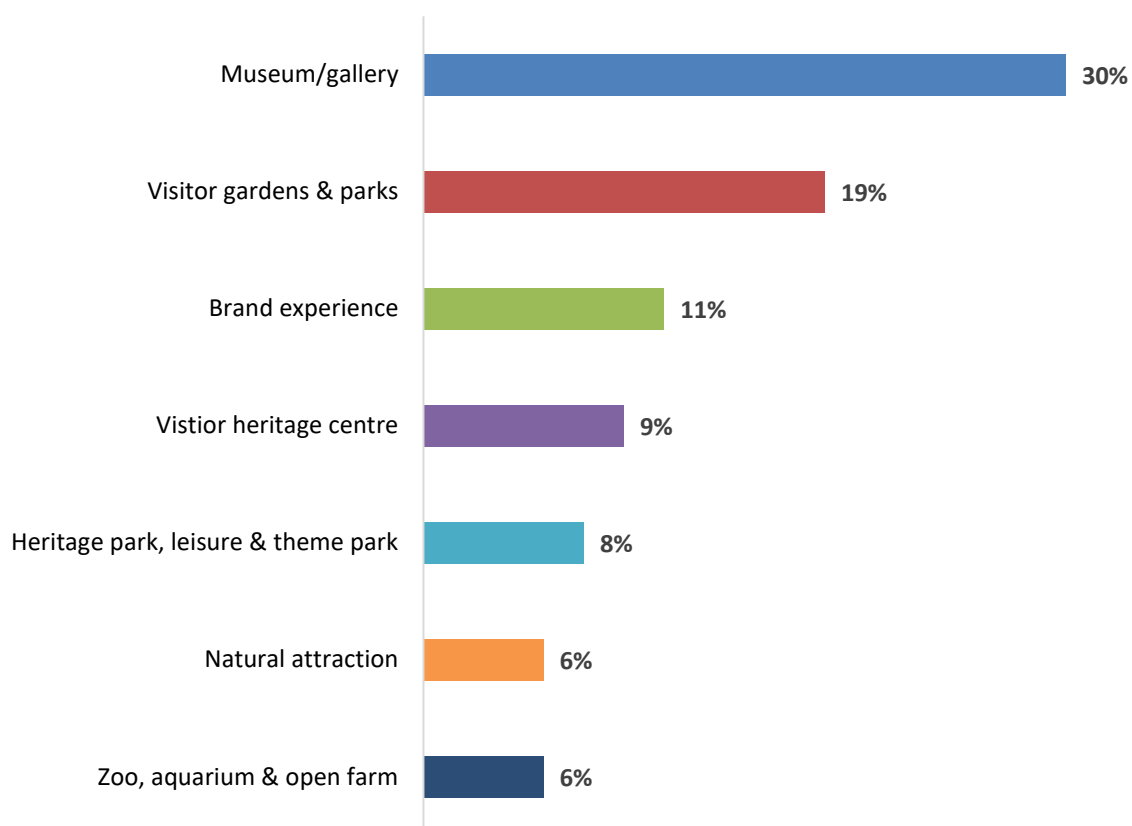
Figure 2.2: Distribution of Respondents by County - 53 respondents



2.3 Category of Attraction

Historic and heritage experiences, including museums and galleries, are by far the most numerous categories of attraction among respondents. A number of respondents fall into more than one category as they offer two or more distinctly different experiences.

Figure 2.3: Category of Attraction



3. VISITOR PROFILES

3.1 Number of Visitors Handled in 2021

The total number of in-person visitors for 51 respondents in 2021 amounted to **4.3m** (4,309,216).

Figures for 3 years were provided by 46 respondents. These show a sharp drop in 2020 due to the COVID-19 pandemic restrictions, and a very modest upturn in 2021 as restrictions continued. The figures highlight the stronger performance by sites outside Dublin, many of which offer outdoor experiences.

3-year comparison (46 respondents)

2019	2020	2021	2020-2021 % change	2019-2021 % change
12.5m	2.8m	4.1m	+43%	-67%

DUBLIN – in-person visitors (21 respondents)

2019	2020	2021	2020-2021 % change	2019-2021 % change
7.2m	1.3m	1.5m	+17%	-79%

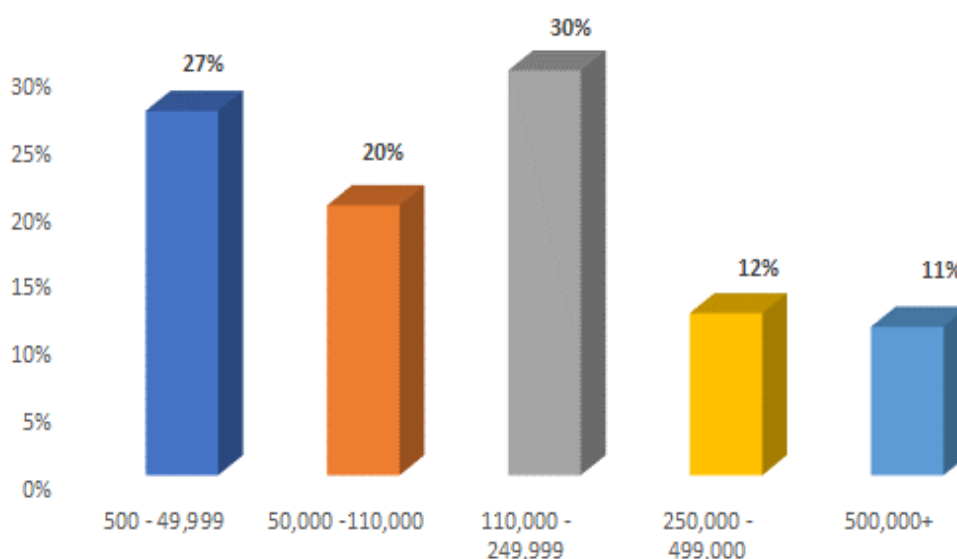
NON-DUBLIN - in-person visitors (25 respondents)

2019	2020	2021	2020-2021 % change	2019-2021 % change
5.3m	1.6m	2.6m	+64%	-51%

As an indicator of the scale of activity that AVEA members expect in a “normal” year, the distribution of members by scale of visitation in 2019 is shown in the following table and chart below.

Visitors	No. of Sites	%
500 - 49,999	24	27%
50,000 - 110,000	18	20%
110,000 - 249,999	27	30%
250,000 - 499,999	11	12%
500,000+	10	11%
Total	90	100%

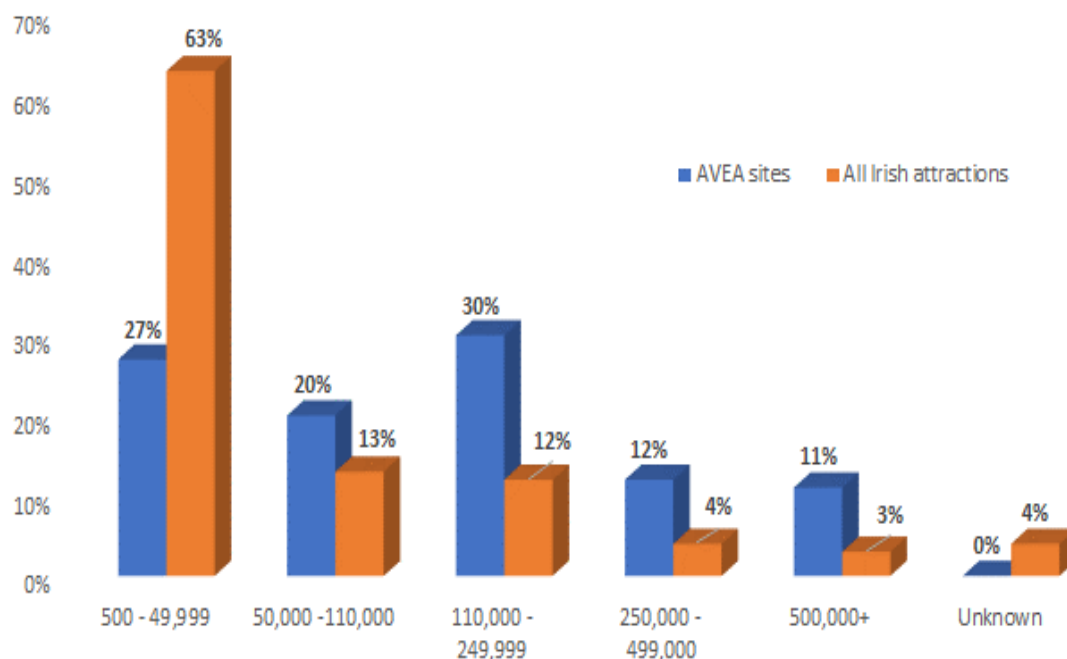
Figure 3.1: Distribution of AVEA Members by Scale of Visitation



The distribution of respondent sites by visitation levels relative to that of all attractions in Ireland is shown in Figure 3.2. As is evident, the AVEA distribution is weighted towards higher levels of visitation whereas over a quarter of all attractions in Ireland receive fewer than 50,000 visitors a year.

AVEA's representation of the Irish visitor attractions sector by size category is as follows:

Figure 3.2: Distribution of AVEA Members & All Irish Attractions by Scale of Visitation

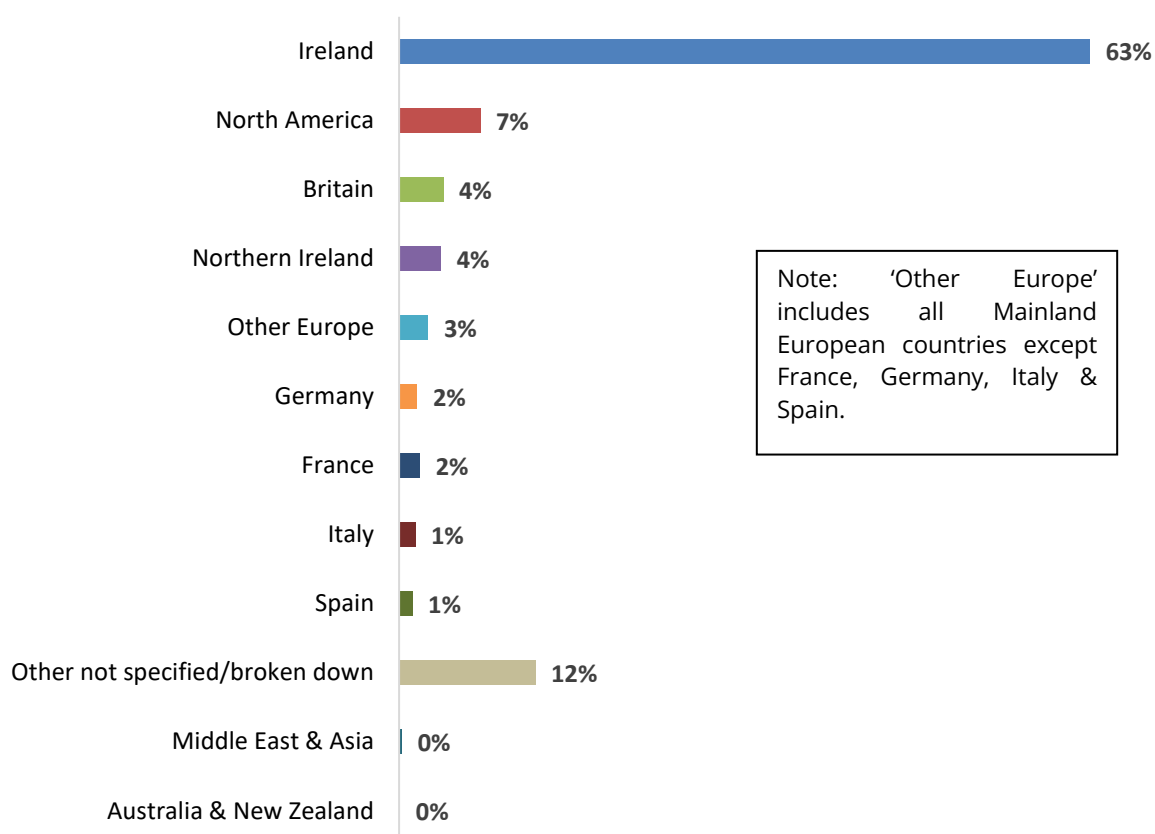


Scale of Visitation	AVEA share of attractions in this category
500,000+	67%
250,000 - 499,999	55%
110,000 - 249,999	46%
50,000 - 110,000	28%
500 - 49,999	8%

3.2 Origin of Visitors

The origin of visitors received by respondents in 2021 is detailed in Figure 3.3. Compared with 2019 and earlier years, the results for 2021 show a very large increase in the proportion of visitor from Ireland and a very steep drop in the proportion of visitors from overseas, especially from North America and Britain. Thus, in 2021, 63% of visitors to respondent sites were domestic in origin – the corresponding figure in 2019 was 47%.

Figure 3.3: Origin of Visitors by Source Market



3.3 Weeks Open to Visitors

Respondents were open for an average of 29 weeks in 2021.

Figures for 3 years were provided by 44 respondents. These show a sharp drop in 2020 due to the COVID-19 pandemic restrictions, followed by a modest upturn in 2021.

3-year comparison (44 respondents)

2019	2020	2021	2020-2021 % change	2019-2021 % change
2,142 Average = 49 wks	1,106 Average = 25 wks	1,283 Average = 29 wks	+16%	-40%

DUBLIN – weeks open (18 respondents)

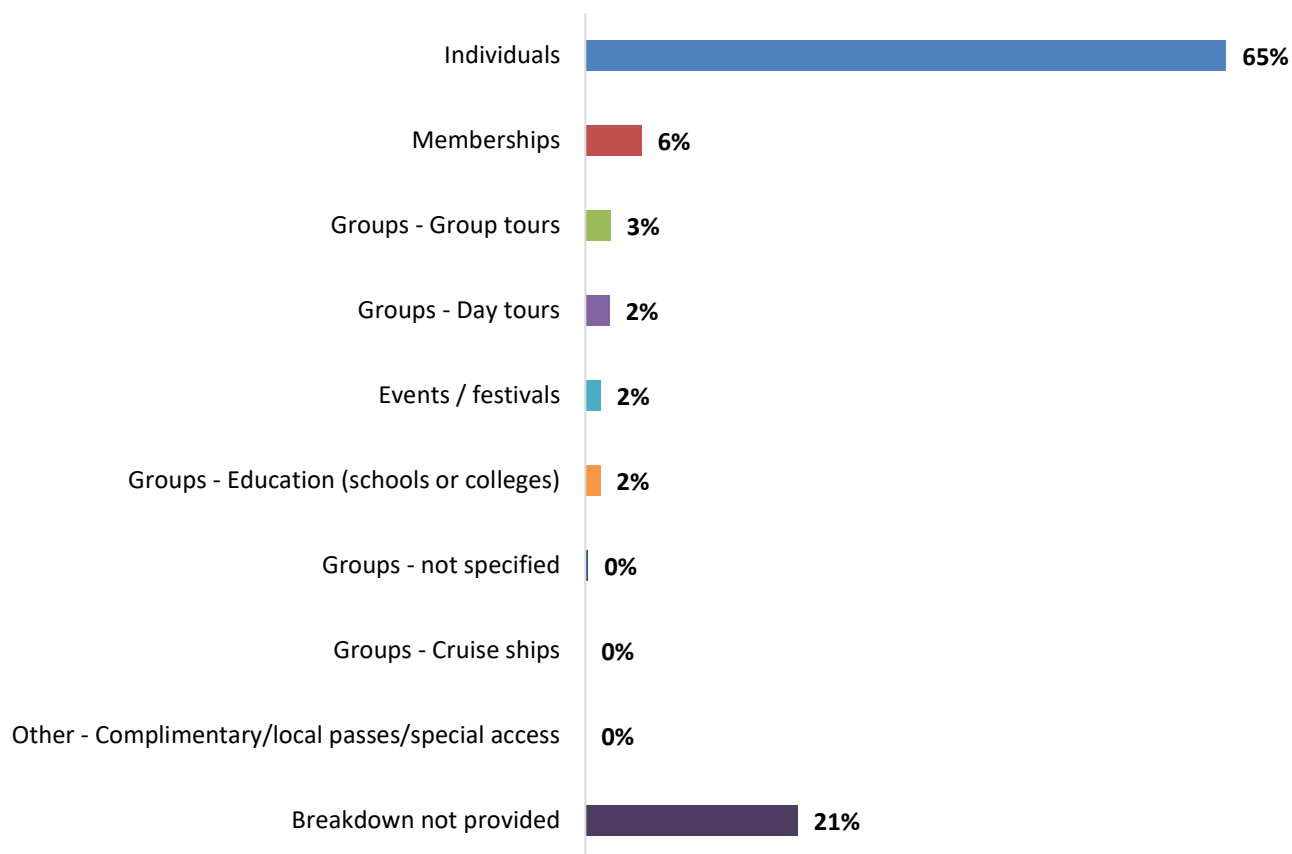
2019	2020	2021	2020-2021 % change	2019-2021 % change
892 Average = 50 wks	415 Average = 23 wks	516 Average = 29 wks	+24%	-42%

NON-DUBLIN – weeks open (26 respondents)

2019	2020	2021	2020-2021 % change	2019-2021 % change
1,250 Average = 48 wks	691 Average = 27 wks	767 Average = 30 wks	+11%	-39%

3.4 Visitor Ticket Categories

Figure 3.4: Distribution of Admissions by Ticket Category



Almost two-thirds of all admissions to respondent attractions in 2019 purchased individual tickets. Not all were at full price - this category includes concessions (students, pensioners, etc.), families and children. The results for 2021 show a very steep drop in group admissions compared to 2019 and earlier years. Total group sales in 2021 accounted for a little over 7% in contrast to the 26% recorded in 2019.

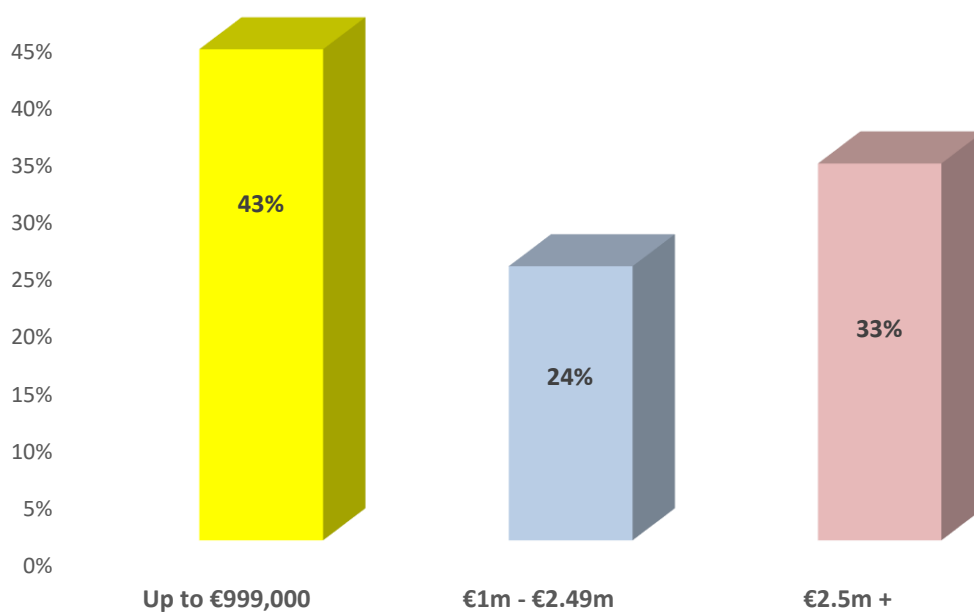
4. FINANCIAL MATTERS

4.1 Revenue

The distribution of respondents by level of revenue in 2021 is detailed in Figure 4.1. In total, the 42 respondents who provided information on this point generated €120.4 million in revenue in 2021. At many sites (43%), annual revenue amounts to less than €1 million; almost another 25% earn between €1 million and €2.5 million, with a third (33%) earning over €2.5 million.

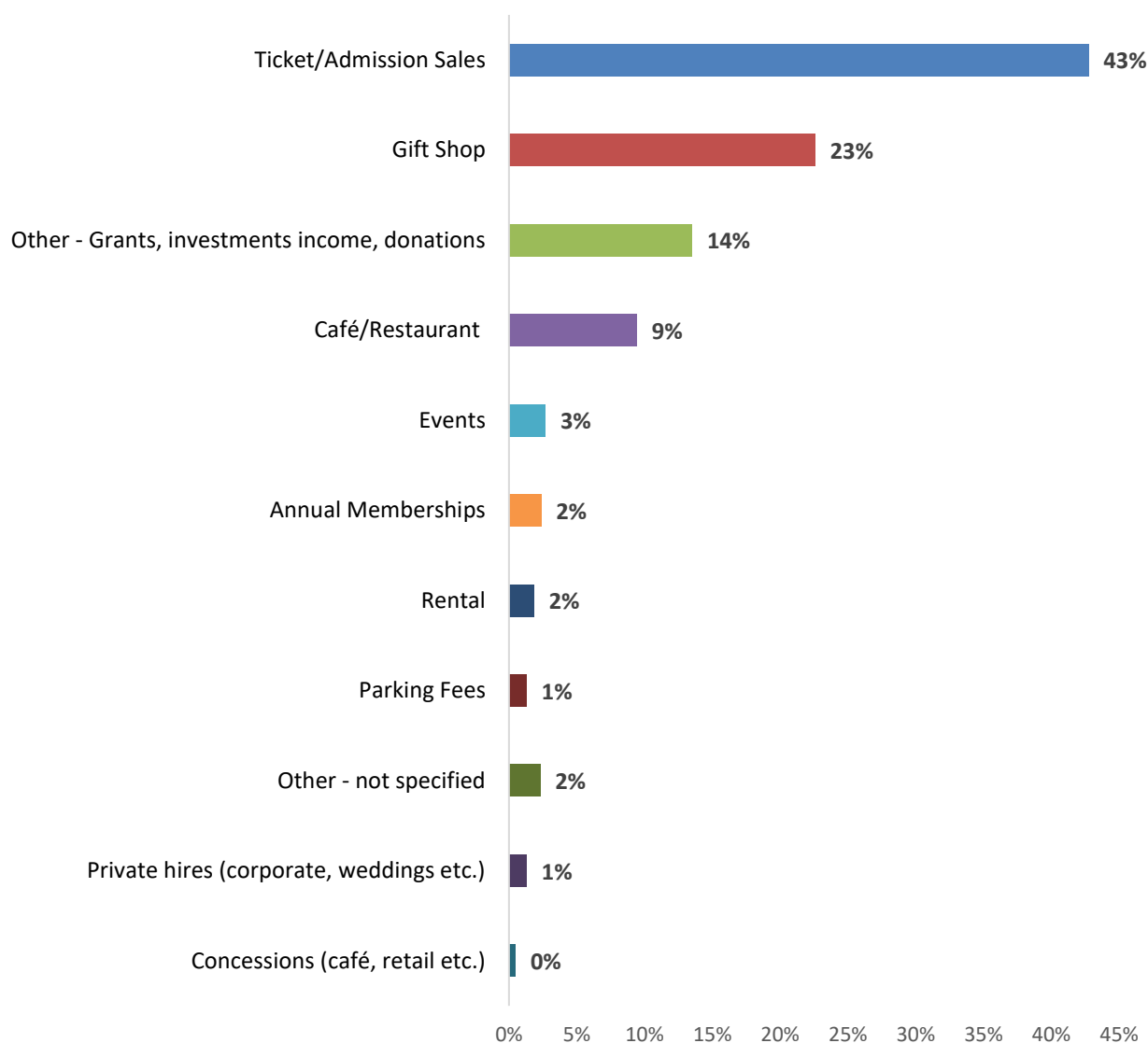
	Actual	%
Up to €999,000	18	43%
€1m - €2.49m	10	24%
€2.5m +	14	33%
Total	42	100.0%

Figure 4.1: Distribution of Respondents by Revenue



In 2021, the share of revenue earned from ticket sales dropped to 43% from an average of 53% reported in 2019 and 2018. Retail and café sales maintained their share of revenue. However, there was an increase in the share of revenue accounted for by all other sources.

Figure 4.2: Distribution of Revenue by Source



4.2 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 Table 4.1 below.

Table 4.1: Average Ticket, Retail and Food & Beverage Sales per Visitor (all figures net of VAT)

	Average Ticket Price, €	Average Retail Spend, €	Average F&B Spend, €
All Respondents	10.06	5.97	€5.23
Dublin	11.66	7.33	5.26
Non-Dublin	9.23	5.07	5.22

The data in Table 4.1 show that there is, potentially, an average of between €19 and €24 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.

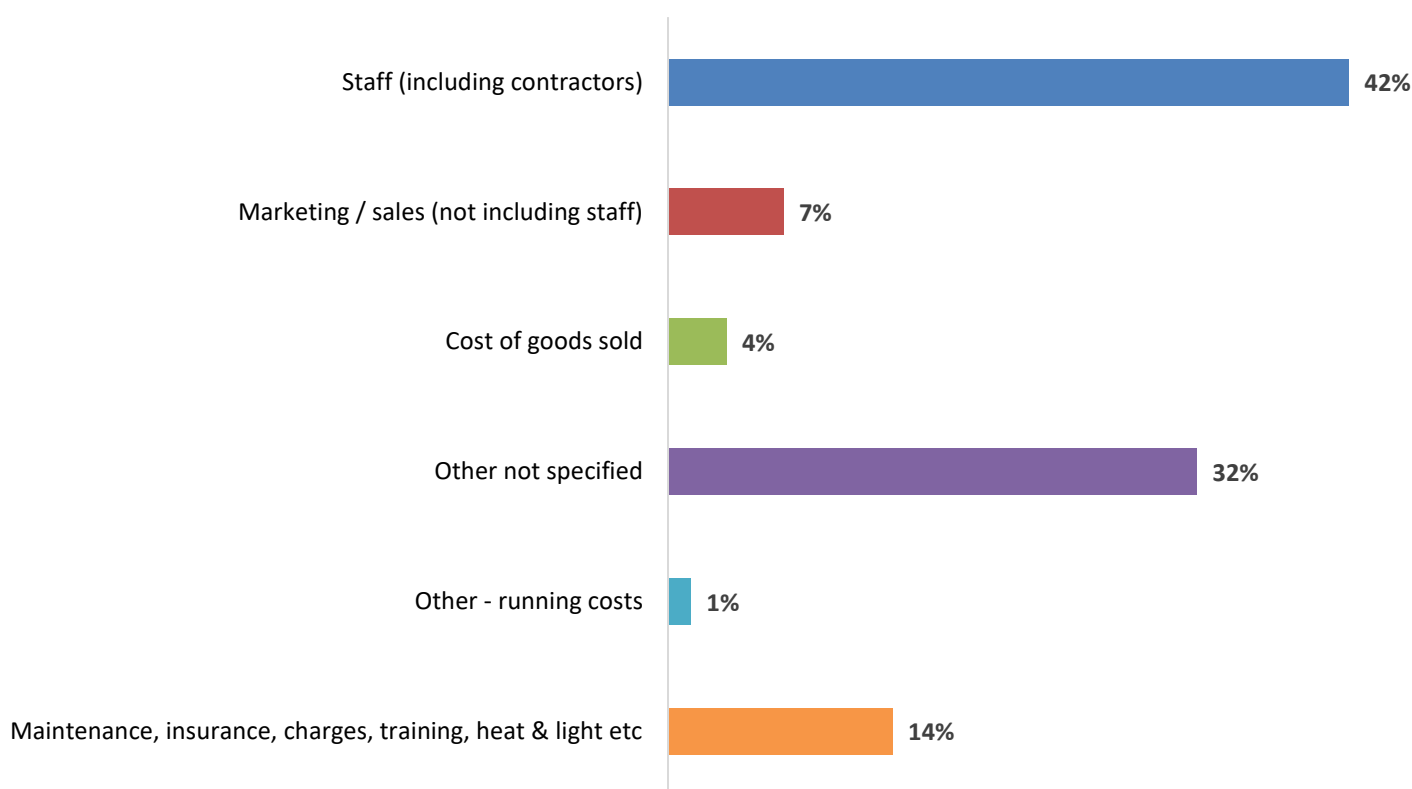
- The average ticket price for 38 respondents in 2021 was **€10.06**. There was a small increase in average yield in 2021 reflecting a change in the visitor mix, notably a drop in tour group traffic.
- The average retail spend per visitor for 25 respondents in 2021 was **€5.97**, net of VAT. This represents an increase of 14% over the average reported in the 2019 survey.
- The average F&B spend per visitor for 15 respondents in 2021 was **€5.23** net of VAT, only slightly ahead of the €5.15 reported in the 2019 survey.
- Among survey respondents, average ticket prices, average retail prices and average food & beverage sales levels are higher at Dublin sites.

4.3 Operating Costs

A broad breakdown of operating costs was sought from respondents - staff (including contractors), marketing and sales (excluding staff), and other operating costs. The results are shown in Figure 4.3.

Staff costs are the largest single cost item. Respondents reported that staff account for 42% of their total operating costs. Marketing costs accounted for just 7% of operating costs in 2021, which is a little below the averages reported in previous years (8.5% in 2019, 9% - 11% in 2018).

Figure 4.3: Breakdown of Operating Expenditure



4.4 Insurance Issues

74% of the 35 respondents to this question said that they did not receive any reduction in or rebate of their insurance premiums due to reduced operations.

Of the 26% of respondents who said they did receive a reduction, the distribution was as follows:

Figure 4.4: Percentage Reduction/Rebate in Insurance Premiums

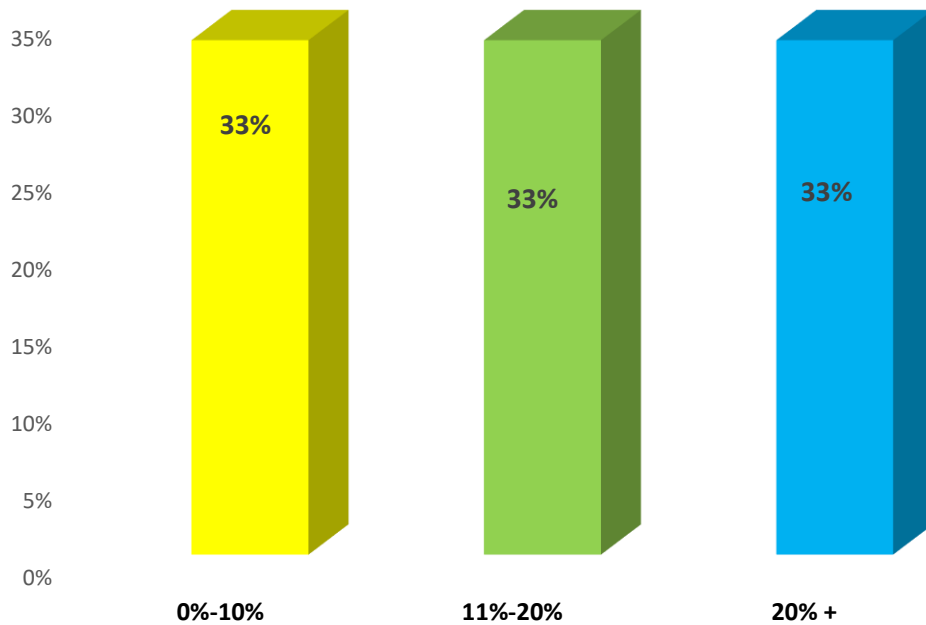
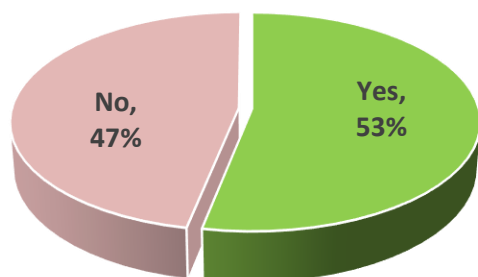


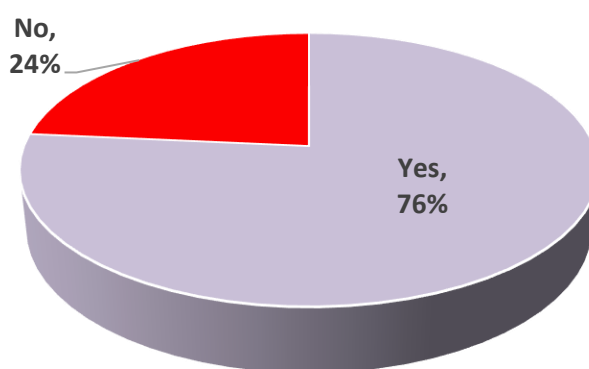
Figure 4.5: Quote for Renewal & Increases in Premiums



Increased by	Actual	%
0%-10%	5	38%
11%-20%	4	31%
20% +	4	31%
Total	13	100%

17 respondents had received their insurance renewal quote by the time of the survey. 13 (76%) of these were quoted an increased premium price, in many cases a substantial increase as shown in the table below.

Figure 4.6: Price Increases



A small number of respondents noted that their insurance policy terms and conditions had been changed. The reasons given for these changes were as follows:

- COVID is not explicitly covered.
- Exclusion of Human Disease in Business Interruption Policy and Flood Risk Exclusion.

- Reduction in the amount of things being covered and putting in more restrictions.
- Cyber insurance and business continuity cover in the event of closure have been withdrawn.
- No hacking or loss of business cover.

5. STAFF

5.1 Staff Employed

Total employment among the 40 respondents to this question over the 3 years fell by 24%. As the breakdown in the tables and Figure 5.1 below show, the respondents placed greatest emphasis on retaining their full-time staff.

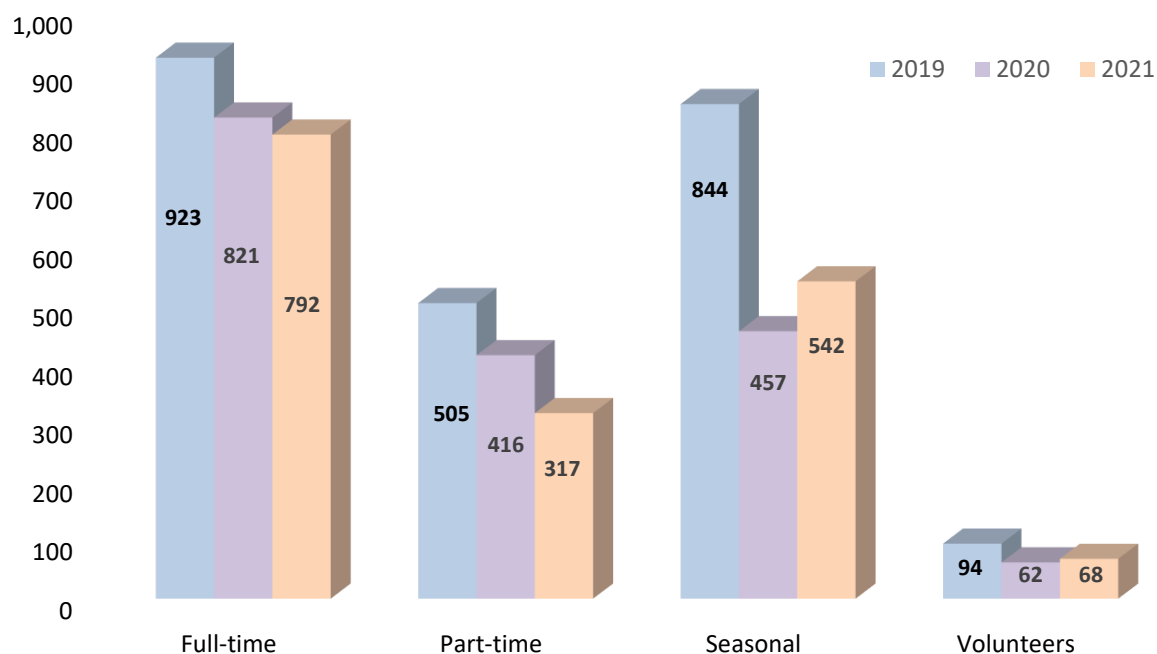
3-year comparison, Actual (40 respondents)

	2019	2020	2021	2020-2021 % change	2019-2021 % change
Full-time	866	796	772	-3%	-11%
Part-time	461	393	304	-23%	-34%
Seasonal	800	438	529	21%	-34%
Volunteers	82	58	66	14%	-20%
Total	2,209	1,685	1,671	-1%	-24%

3-year comparison, % share (40 respondents)

	2019	2020	2021	2020-2021 % change	2019-2021 % change
Full-time	39%	47%	46%	-1%	+7%
Part-time	21%	23%	18%	-5%	-3%
Seasonal	36%	26%	32%	+6%	-4%
Volunteers	4%	3%	4%	+1%	0%
Total	100%	100%	100%		

Figure 5.1: Staff Employed, 2019, 2020 and 2021



5.2 Principal Obstacles to the Employment of New Staff in 2022

where 1 = the most important and 6 = the least important

Rank	
1	Pay
2	Lack of candidates
3	Competition from other sources
4	Seasonality of employment
5	Skills shortages
6	Working hours

Other issues mentioned:

- Location
- Lack of confidence that employment will be sustained
- COVID

5.3 Principal Needs regarding Recruitment of Staff in 2022

As shown in Figure 5.2, the areas of greatest need are in the front-of-house - Guides and Retail 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

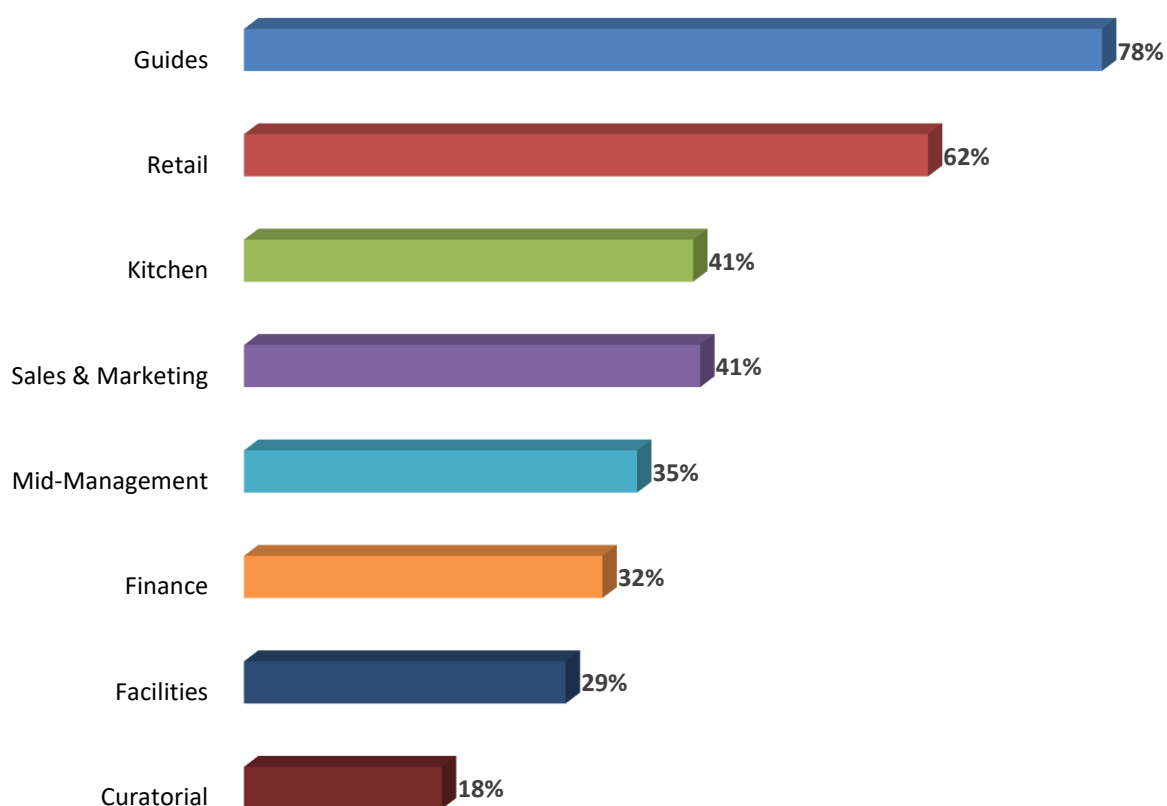


Figure 5.3: Areas of Skills Needed

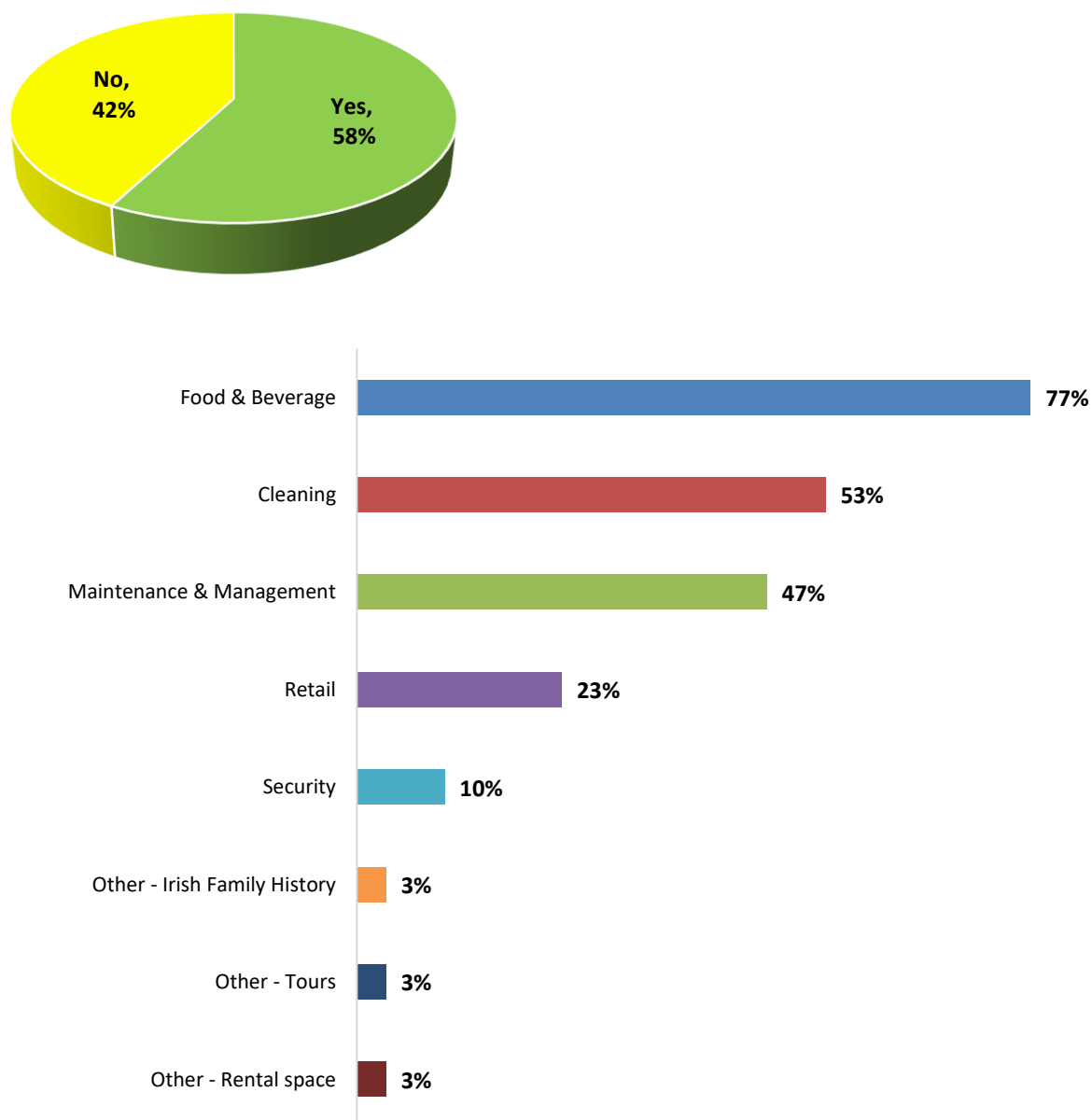


Reflecting the shortages in front-of-house staff, the proportion of respondents citing skills deficiencies in customer service rose from 41% in 2019 to 83% in 2021.

5.4 Use of External Contractors / Concessionaires

58% of the 53 survey respondents employ external contractors and/or concessionaires on site. As Figure 5.4 shows, such external providers are mostly used to operate food and beverage outlets, provide cleaning, maintenance and management services, and to run retail outlets.

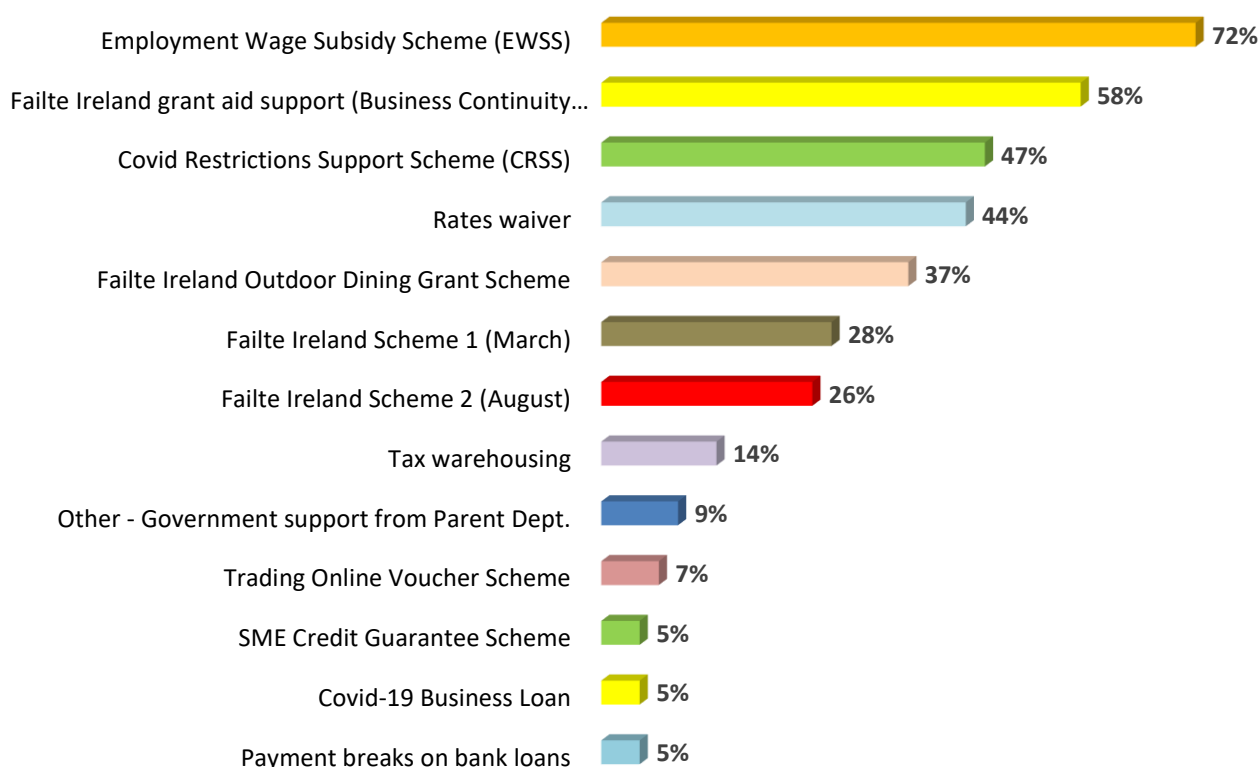
Figure 5.4: Use of External Contractors / Concessionaires



6. WORKING WITH COVID

6.1 COVID Supports

Figure 6.1: COVID Related Supports



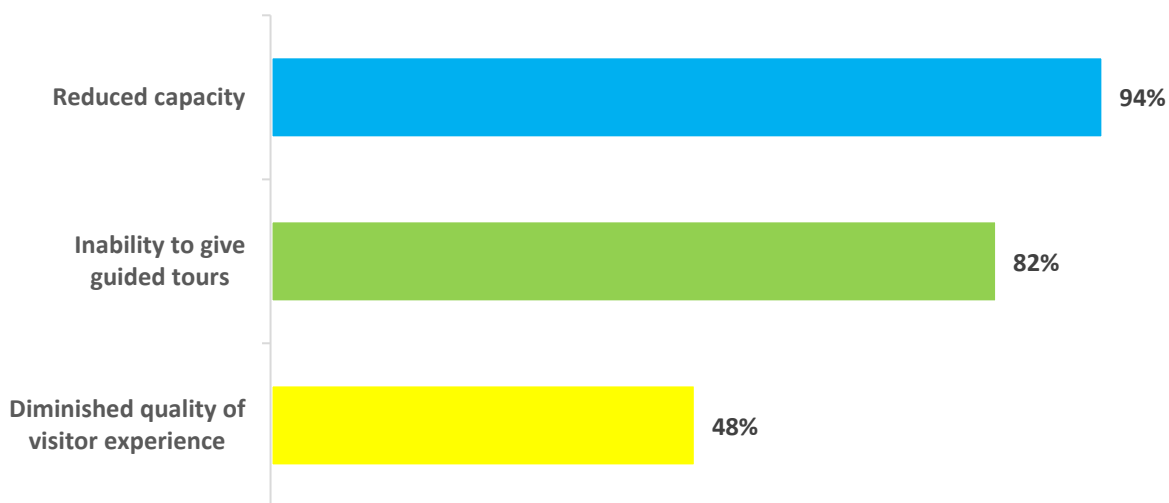
Of those who stated they did not apply for additional supports, the following reasons were given:

- Funded through grant from Government
- Not eligible for Failte Ireland grant aid support
- Staff employed through Community Employment Scheme
- Retail side of business earned more than the cut-off point so the tourism side was disqualified from supports
- Took an SCBI loan in 2020 to help carry business to June 2022.

6.2 Working with COVID

The most common issues identified by respondents are highlighted in the chart below:

Figure 6.2: How did COVID restrictions impact on your business?



Other answers given were as follows:

- Long period of closure
- Wearing of face masks removed a level of interaction
- No international travel and internal travel restrictions
- Reduced retail spend.

Figure 6.3: In delivering a visitor experience in a COVID environment in 2021, were you able to develop new means of engaging with visitors?

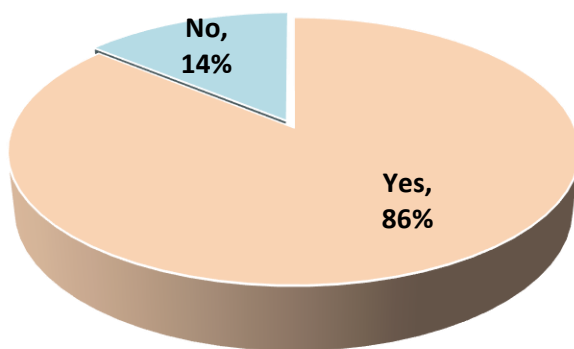
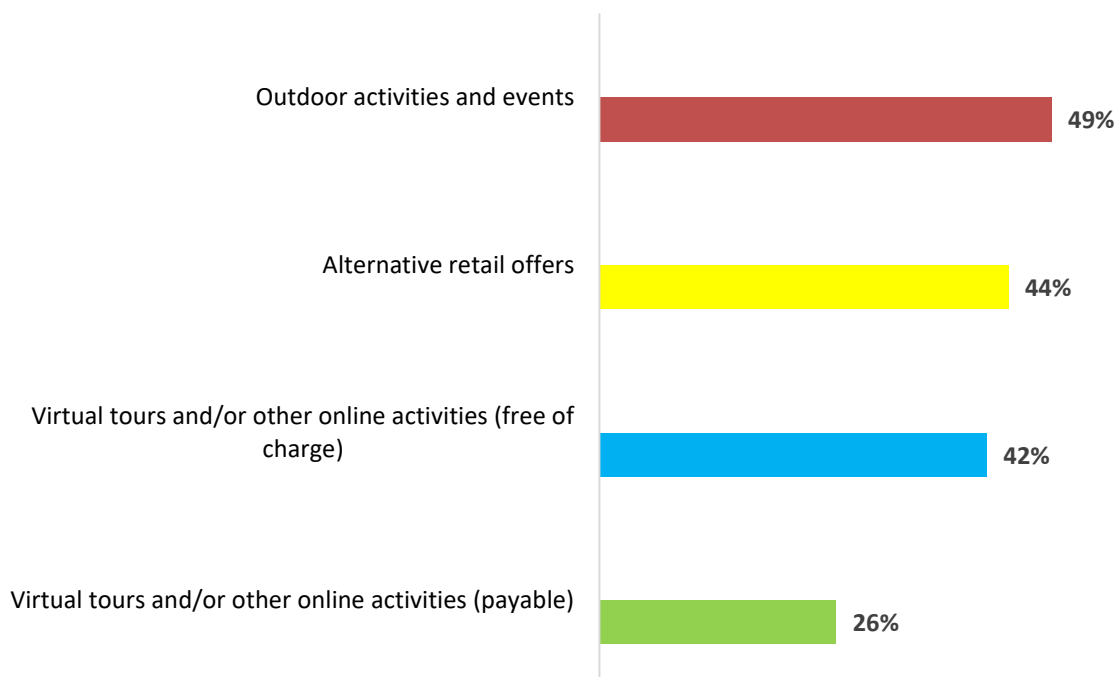


Figure 6.4: If Yes, what were they?



Other answers mentioned included audio guides, online ticketing, alternative catering options, annual memberships, improved online offering and self-guided options.

Figure 6.5: Were you able to generate revenue through ecommerce initiatives while you were closed?

	Actual	%
Yes	20	43%
No	27	57%
Total	47	100%

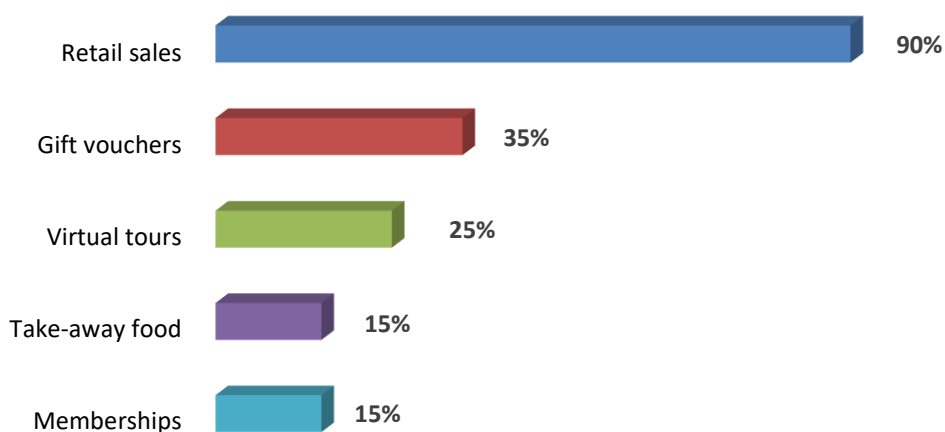


Figure 6.6: Factors critical to enabling re-opening in 2022?

Rank	Factor
1	Positive consumer sentiment
2	Retention of existing key staff/expertise
3	Grant-aid to cover a share of operating costs
4	Continuation of EWSS at current rates
5	Continuation of local authority rates waiver
6	Extension of bank loan repayment moratoriums

Others critical factors mentioned:

- Tourist numbers to recover / supply chain issues
- Recruitment of new staff.

Half of the respondents stated that their capital investment plans had changed as a result of the pandemic (Figure 6.7). For almost three-quarters of these, their planned investments were cut (Figure 6.8). This push back of capital investment may have a negative impact on the quality of the visitor experience at many sites in the short to medium term.

Figure 6.7: Have your capital investment plans for the period 2021-2025 changed as a result of COVID?

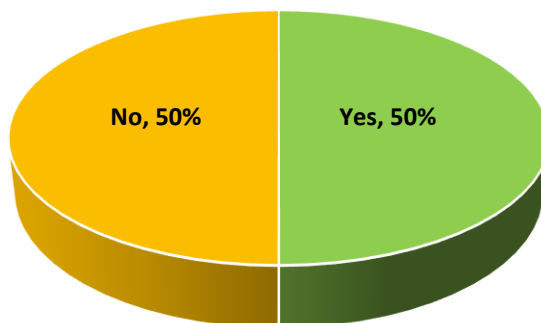
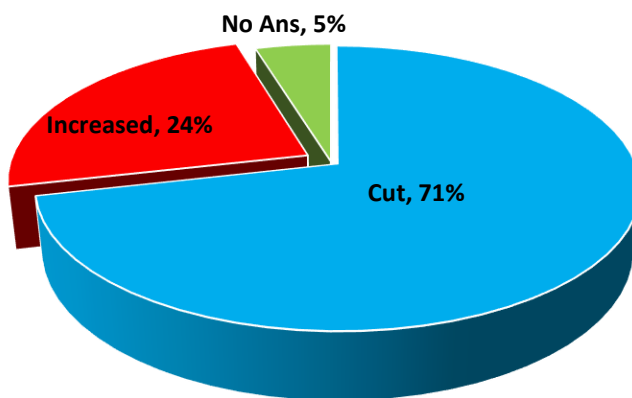


Figure 6.8: If Yes, have they been cut or increased?



The main reasons given for these changes were as follows:

Cut

- Concerns around financial stability and ongoing uncertainty re operating cash flows and funding support
- we need to be sure our cash reserves are protected to ensure viability in 2022
- risk of recession
- lack of support from banks
- Uncertainty around future of COVID - business has not yet fully recovered
- Lack of revenue over past 2 years will see only essential works taking place
- Uncertainty re future visitor numbers.

Increased

- Funding received has secured significant investment in attraction
- Have focused more on enhancing guest experience
- Have focused on attracting new markets

7. ONLINE BOOKINGS

7.1 Tickets Sold Online

Figure 7.1: What % of tickets did you sell online in 2019 and 2021?

	53 respondents 87% rr 2019	39 respondents 74% rr 2021
0% - 20%	72%	36%
21% - 40%	19%	18%
41% - 60%	8%	8%
61% - 80%	2%	8%
81% - 100%	0%	31%
Total	100%	100%

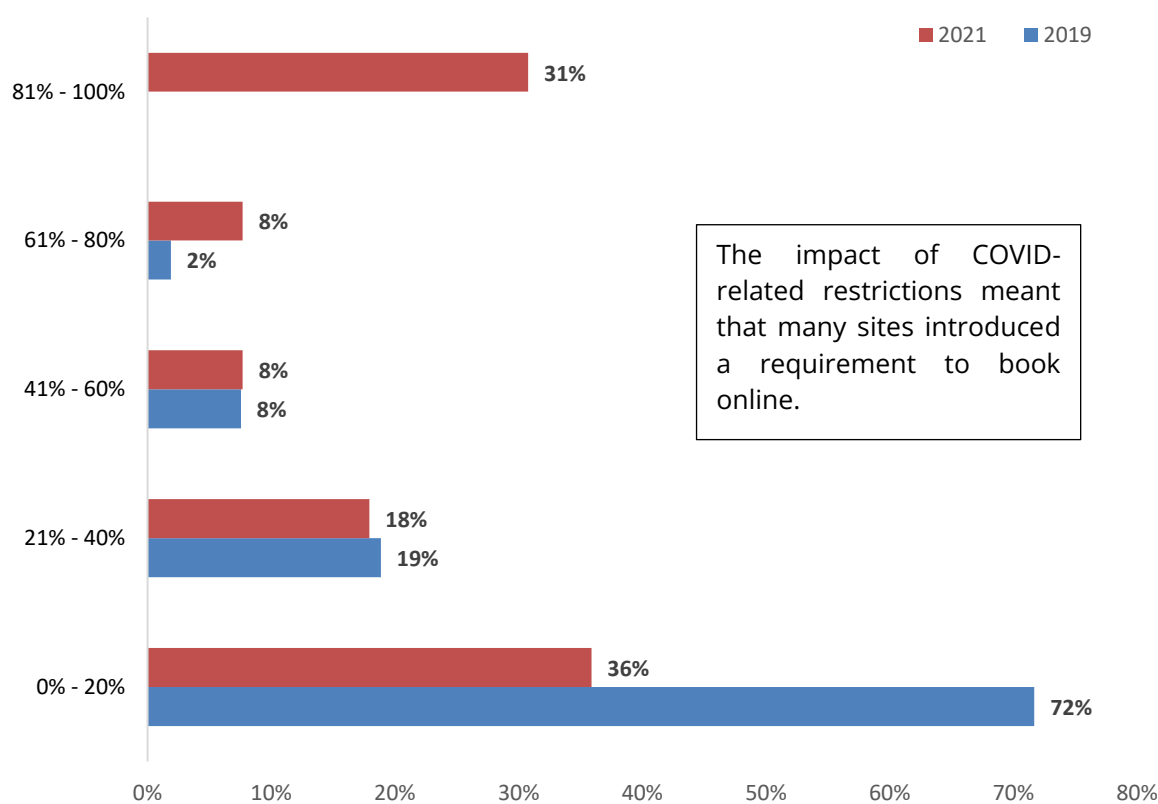
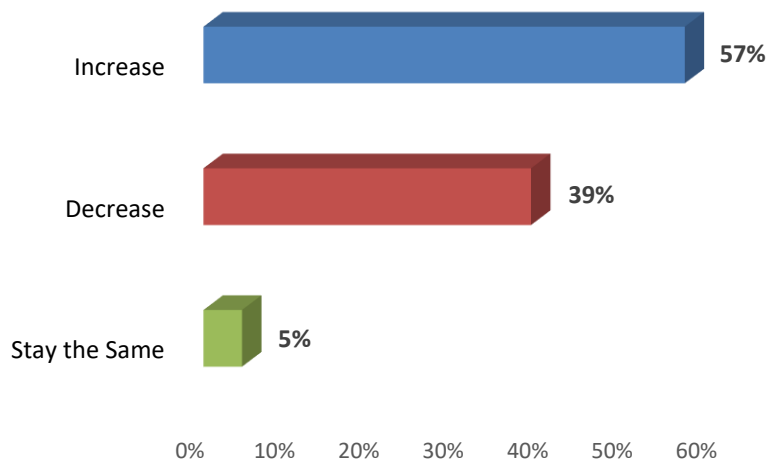


Figure 7.2: Do you expect this to increase or decrease in 2022?



When asked why respondents expected online sales to increase or decrease the following answers were given:

Increase

- Focused effort on moving visitors to book online through incentivised online pricing
- Because of increased digital presence on marketing channels, sales channels and increased consumer / visitor digital awareness
- Upgraded booking system on our website and increased marketing to drive customers to book online in advance of their visit
- Due to limited capacity, we are encouraging pre booking online
- The habit of pre-booking is now entrenched in customer behaviour
- Expect an uplift in international visitors in 2022 and, within that, an increase in FIT visitors who should book online

Decrease

- Only open for short while during 2021 so likely will have an increase in walk up visitors for summer 2022.

- COVID probably contributed to people pre-booking online in advance of their arrival but with COVID recovery and return of overseas visitors, there will be a return to more walk ins and groups booking by email/phone
- Trend to increasing walk-ups observed since COVID measures were relaxed – a similar trend was observed in the March sentiment survey from ALVA in the UK.

Stay the Same

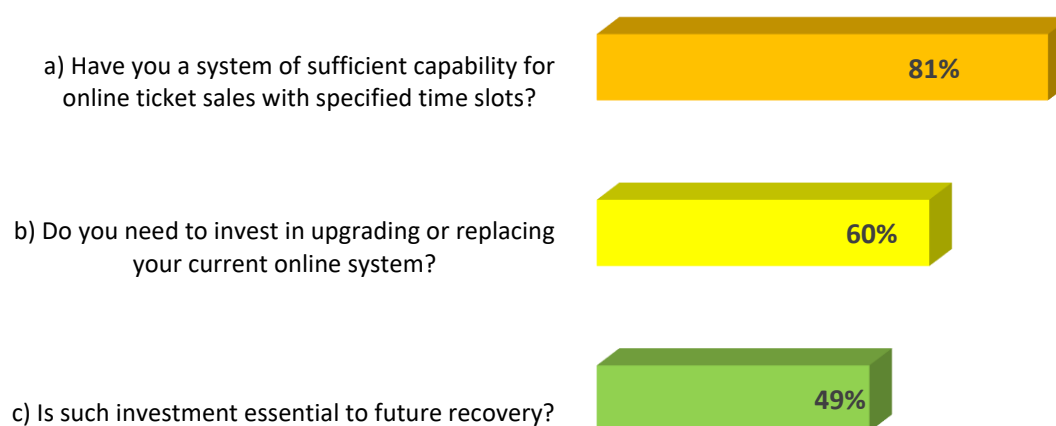
- Visitors feel more comfortable having reserved their tickets in advance, less cash handling etc.

7.2 Online Booking System

Figure 7.3: Online Booking System

	Actual		%	
	Yes	No	Yes	No
Have you a system of sufficient capability for online ticket sales with specified time slots?	38	9	81%	19%
Do you need to invest in upgrading or replacing your current online system?	28	19	60%	40%
Is such investment essential to future recovery?	21	22	49%	51%

Those who stated 'Yes' to the following factors



7.3 Engaged with 'Digital that Delivers'

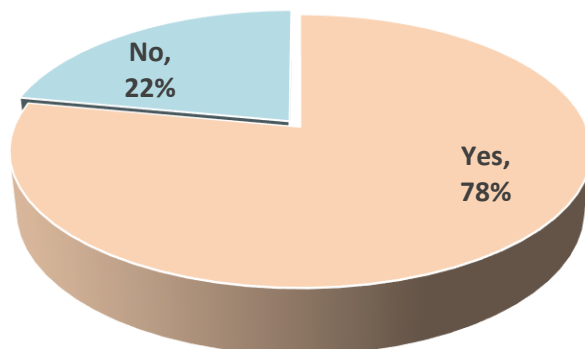


Figure 7.2: If you have engaged with Digital that Delivers, what steps have you taken to improve your digital capability?



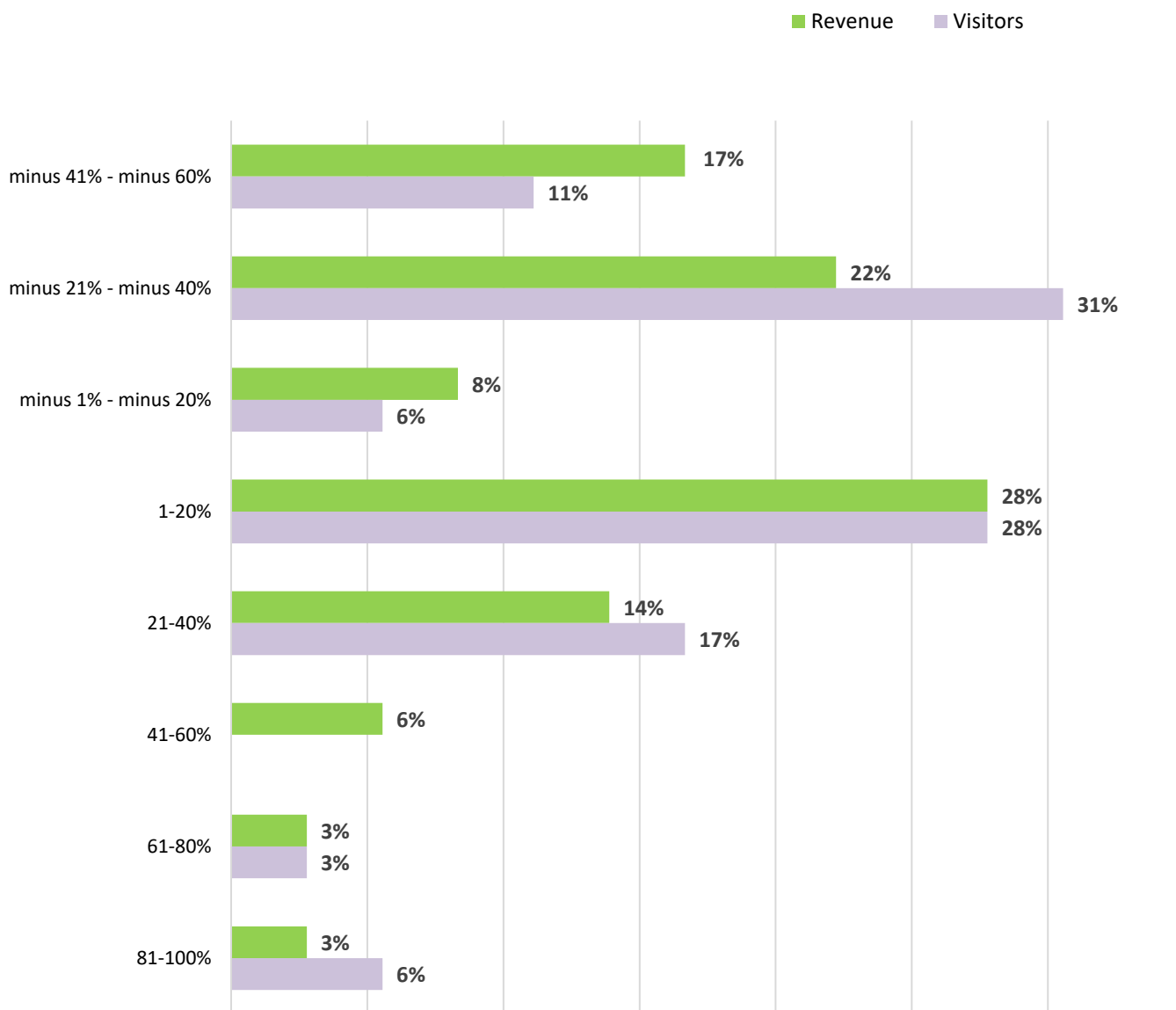
Other steps mentioned were as follows:

- Not implemented yet
- New social media platforms
- Integration of EPOS with ticketing.

8. LOOKING AHEAD

8.1 'Best Guess' Projections

Figure 8.1: What is your 'best guess' projection for 2022 as a % of 2019 in terms of visitor numbers and revenue?



8.2 Priorities for AVEA in 2022

Lobby for Continued Financial Supports

- Recovery will continue to be the major priority for AVEA in 2022 and advocating for the supports necessary for commercial tourism attractions to stay operational and recover
- Continue to be a voice for necessary financial supports available from State agencies, especially for 2022, where it is anticipated that there will be a significant shortfall between domestic market visitors opting for overseas holidays & breaks versus incoming visitors
- Identify and develop sustainable (financial/environmental) VE models
- Targeted continuation of EWSS for businesses
- Wages are a huge issue right now for tourism businesses; getting in seasonal staff is very difficult as we are competing with owner-run businesses that can pay better rates
- Helping members improve retail sales / online bookings.

Representation, Lobbying and VAT

- Continued support/lobbying for upskilling in the industry and for issues that arise in the economic environment
- Keeping the importance of the attraction sector front and centre with tourism bodies and government
- To represent the membership and lobby on behalf of the membership at Government level
- Maintaining the 9% VAT rate.

Promotion and Advocacy

- Promotion of and continued collaboration within the industry

- Make attractions and experiences exciting domestically and still promote their COVID safety versus other options
- Showcase the amazing diversity of quality visitor attractions within the AVEA
- Clustering of visitor attractions to co-promote, cross-train and share resources where available
- Provide a robust marketing scheme to target in particular the domestic market
- Promote membership portfolio at fairs both at home and abroad.

Networking, Training and Education

- Would like to see the conferences continue as networking and sharing of best practice is essential for us all, as well as more education/training seminars. More sharing of data for benchmarking throughout the year would be very useful also
- Provide training and education specific to the tourist industry to attract people to the sector
- Continue providing sectoral guidance & knowledge to members to arm them with important information & business tools.

Appreciation for AVEA

- Appreciate all that AVEA did for the sector through 2020 and 2021
- Great communication and support
- AVEA have done a fantastic job throughout the COVID pandemic - supporting our industry, providing timely and accurate information, lobbying the government and a listening ear.
- We are delighted to have this support.

9. APPENDICES

9.1 List of Members 2022

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

9.2 Survey Questionnaire



FINAL



ASSOCIATION OF VISITOR EXPERIENCES & ATTRACTIONS

Survey of Business Performance 2021

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 2021 taking into account the impact of Covid-19. The findings of the survey will enable AVEA to represent and promote 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 2021 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 1st March 2022. Please call Michael Counahan (tel: 087 250 5879 / 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 2021

1) Name of Visitor Experience/Attraction: _____

2) Questionnaire completed by: _____

ABOUT YOUR ATTRACTION

3) Location (County/City): _____

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

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

Yes	_____	No	_____
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If Yes, for what functions? (pls insert 'X' in the appropriate boxes)

Retail	_____	Maintenance	_____
Food & Beverage	_____	Other (please specify)	_____
Cleaning	_____		

KEY FINANCIAL DATA

7) What was your total revenue, net of VAT?

in 2018 (Euro)	_____
in 2020 (Euro)	_____
in 2021 (Euro)	_____

8) How many in-person visitors did you receive?

in 2019	_____
in 2020	_____
in 2021	_____

10) For how many weeks were you open to visitors?

in 2019	_____
in 2020	_____
in 2021	_____

11) What % of your revenue in 2021 came from the following sources?

Source

Source	% share of turnover
Ticket/Admission Sales	_____
Gift Shop	_____
Cafe/Restaurant	_____
Events	_____
Private hires (corporate, weddings etc.)	_____
Concessions (café, retail etc.)	_____
Rental	_____
Parking Fees	_____
Annual Memberships	_____
Other (please specify)	_____
Total	_____

12) Ticketing: What was the average ticket sale price per visitor in 2021 (net of VAT)?

€ _____

13) Retail sales: What was the average retail spend per visitor in 2021 (net of VAT)?

€ _____

14) Cafe/restaurant: What was the average food & beverage spend per visitor in 2021 (net of VAT)?

€ _____

15) What was the breakdown of your operating expenditure in 2021 across the following categories?

Category

Category	%
Staff (including contractors)	_____
Marketing / Sales (not including staff)	_____
Other (please specify)	_____
Total	_____

YOUR VISITORS

16) Please breakdown the total number of visitors in 2021 by source market?

Source Market	Number	Source Market	Number
Britain	_____	North America	_____
Ireland	_____	- USA	_____
Northern Ireland	_____	- Canada	_____
Mainland Europe	_____	China	_____
- Germany	_____	India	_____
- France	_____	Middle East	_____
- Italy	_____	Australia/New Zealand	_____
- Spain	_____	Other	_____
Other European Markets	_____	Total	_____

17) What % of your admissions came from the following ticket categories in 2021?

Category

Category	% share of visitors
Individuals (adults, children, families, concessions)	_____
Groups	_____
- education (schools or colleges)	_____
- group tours	_____
- day tours	_____
- cruise ships	_____
Memberships	_____
Events / festivals	_____
Other (please specify)	_____
Total	0.0%

YOUR STAFF

18) How many staff did you employ in 2019, 2020 and 2021?

Category	2019 No.	2020 No.	2021 No.
Full-time			
Part-time			
Seasonal			
Volunteers			
Total	0.0	0.0	0.0

19) What are the principal obstacles to the employment of new staff in 2022?
(please rank in order of importance from 1 - 5, where 1 is most important, and 6 is least important)

Obstacles

- Working hours
- Pay
- Skill shortages
- Lack of candidates
- Competition from other sectors
- Seasonality of employment
- Other (please specify)

20) What are your principal needs regarding recruitment of staff in 2022?
(please insert 'X' in the appropriate boxes)

Staff Category

Staff Category	Yes	No
a) Finance		
b) Guides		
c) Kitchen		
d) Retail		
e) Facilities		
f) Mid-Management		
g) Sales & Marketing		
h) Curatorial		
i) Other (specify)		

Skills

Skills	Yes	No
a) Languages		
b) Communications		
c) Customer Service		
d) Other (specify)		

COVID-19 SUPPORTS

21) What Covid-19 related supports did you availed of in 2021?
(please insert 'X' in all that apply)

- Employment/Wage Subsidy Scheme (EWSS)
- Covid Restrictions Support Scheme (CRSS)
- Faite Ireland Outdoor Dining Grant Scheme
- Faite Ireland grant aid support (Business Continuity Funding)
- Faite Ireland Scheme 1 (March)
- Faite Ireland Scheme 2 (August)
- Tax warehousing
- Rates waiver
- SME Credit Guarantee Scheme
- Covid-19 Business Loan
- Payment breaks on bank loans
- Trading Online Voucher Scheme
- Other (please specify)

22) If you did not apply for financial support, why not?

INSURANCE

23) In 2021, did you receive any reduction in or rebate of your insurance premiums due to reduced operations? Yes No

23a) If Yes, what was the % reduction/rebate?

24) Have you received a quote and terms/conditions for insurance policy renewal for 2022? Yes No

24a) If Yes, has the price increased? Yes No

24b) If Yes, by how much (%)?

24c) Have the terms and conditions changed? Yes No

24d) If Yes, in what way? - do you feel you can adequately respond?

WORKING WITH COVID

25) How did Covid restrictions impact on your business?
(please insert "X" in all that apply)

Reduced capacity

Inability to give guided tours

Diminished quality of visitor experience

Other (please specify)

26) In delivering a visitor experience in a Covid environment in 2021, were you able to develop new means of engaging with visitors? Yes No

26a) If Yes, what were they? *(please insert "X" in all that apply)*

Outdoor activities and events

Virtual tours and/or other online activities (payable)

Virtual tours and/or other online activities (free of charge)

Alternative retail offers

Other (please specify)

26b) Were you able to generate revenue through ecommerce initiatives while you were closed? Yes No

26c) If Yes, what were they? *(please insert "X" in all that apply)*

Retail sales

Virtual tours

Take-away food

Gift vouchers

Memberships

Other (please specify)

27) What factors are critical to enabling reopening in 2022?
(pls insert "X" in the appropriate boxes)

Factors	Unimportant	Neutral	Important	Very Important
Continuation of EWSS at current rates	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Continuation of local authority rates waiver	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Grant-aid to cover a share of operating costs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Extension of bank loan repayment moratoriums	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Retention of existing key staff/expertise	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Positive consumer sentiment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other (please specify)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

28) Have your capital investment plans for the period 2021-2025 changed as a result of Covid?	Yes	<input type="text"/>	No	<input type="text"/>
28a) If Yes, have they been cut or increased?	Cut	<input type="text"/>	Increased	<input type="text"/>
28b) Please give the main reason for the change	<input type="text"/>			
	<input type="text"/>			

ONLINE BOOKING SYSTEM

29) Online booking system
(please insert 'X' in the appropriate boxes)

a) Have you a system of sufficient capability for online ticket sales with specified time slots?	Yes	<input type="text"/>	No	<input type="text"/>
b) Do you need to invest in upgrading or replacing your current online system?	<input type="text"/>		<input type="text"/>	
c) Is such investment essential to future recovery?	<input type="text"/>		<input type="text"/>	

30) Have you engaged with 'Digital that Delivers'?

	Yes	<input type="text"/>	No	<input type="text"/>
--	-----	----------------------	----	----------------------

30a) If Yes, what steps have you taken to improve your digital capability?
(please insert 'X' in all that apply)

- Improved digital marketing
- Enhanced website
- Improved online booking system
- Other *(please specify)*

31) What % of tickets did you sell online in 2021?

32) Do you expect this to increase or decrease in 2022?

	Increase	<input type="text"/>	Decrease	<input type="text"/>
--	----------	----------------------	----------	----------------------

33) Why do you expect online sales to increase or decrease?

FINAL OBSERVATIONS

34) What is your 'best guess' projection for 2022 as a percentage of 2019 in terms of:

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

35) What should be AVEA's priorities for 2022?

THANK YOU FOR YOUR TIME AND CO-OPERATION

CHL

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