AVEA

ASSOCIATION OF VISITOR EXPERIENCES & ATTRACTIONS

Survey of Members 2018 Performance Report

Representing the Irish Visitor Experience & Attractions Sector

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SURVEY OF MEMBERSHIP BUSINESS IN 2018

- Report -

Prepared by CHL Consultants for

ASSOCIATION OF VISITOR EXPERIENCES & ATTRACTIONS

May, 2019

CONTENTS

CHAIRMAN'S FOREWORD

As the representative association for the Visitor Experience and Attractions Sector in Ireland, AVEA commissioned CHL Consulting to undertake the Annual Survey of Membership Business. This is an important element of the work that AVEA does for its members. Gathering this information enables members to benchmark their performance against industry standards. Of equal importance, the Survey fills a long-standing knowledge gap by providing relevant and up-to-date intelligence on the scale and scope of the business operations of the Visitor Experience and Attractions (VEA) sector. The Survey results highlight the value, opportunities and challenges of this vital sector in Irish Tourism.

This is the second year of the Survey of Membership Business, and we are delighted to have achieved a 72% response rate. As the Association continues to grow in the years ahead, the Survey will provide a consistent annual set of rich and meaningful data for the benefit of its members. It will also assist other sectors and stakeholders in Irish tourism to understand the nature of the VEA sector and the vital role it plays in delivering the unique appeal of Ireland as a holiday destination for international and domestic visitors.

A core initiative of AVEA for 2019 is to develop a Responsible Tourism Framework to enable our members to develop and/or enhance their own sustainable tourism policies. AVEA members are keenly aware of the importance of protecting our environment so that future generations can continue to enjoy the built and natural heritage of which our members are custodians. The VEA sector is firmly rooted in Ireland's cultural heritage, and AVEA's membership encompasses a rich tapestry of places and buildings that have survived countless generations; their ongoing prosperity is integral to delivering the stories of our history. The Association is committed to identifying specific Responsible Tourism actions that all our members can implement, to ensure the long-term sustainability of our sector and the heritage treasures that we care for. Future annual surveys will include the measurement of our success in this regard.

Paul Carty|Chairman
AVEA

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1. SURVEY INTRODUCTION AND EXECUTIVE SUMMARY

1.1 Background to the Survey

The Association for Visitor Experiences and Attractions (AVEA) was formally launched on 31st May, 2017. There was a rapid take-up of membership, with the first membership year commencing on 1st September, 2017, and a total of 75 members joining that year. There are now 88 members of the Association - see Appendix 1.

One of the criteria for membership is agreement to participate in AVEA'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 will enable members to benchmark their performance against industry standards. They will also enable AVEA to represent and promote the interests of its members more effectively and to communicate the value of AVEA members' and the sectors' contribution to Irish tourism to relevant industry stakeholders and State agencies.

This is the second annual iteration year of this survey, with a total of 60 responses being received from the 83 members surveyed, representing a response rate of 72%[1]. This represents a significant increase over the 40 responses recorded for the first survey. Of the 60 respondents in 2019:

- 28 are located in Dublin and 32 elsewhere
- 27 received less than 110,000 visitors in 2018, and 33 received more than 110,000.

This report contains the findings of the survey of business performance in 2018. Copies of the questionnaire and guide to completion are provided in Appendix 2.

[1] 5 additional members have joined since the launch of the survey.

1.2 Importance of AVEA and the Visitor Attraction Sector

Holiday visitors to Ireland are motivated to come here to explore and enjoy Ireland - its natural environment, people, heritage and culture. Visitor attractions and experiences play a vital role in fulfilling visitor expectations by offering a wide choice of things to see and do. As noted by Patrick O'Donovan T.D., the then Minister of State for Tourism and Sport, at the launch of AVEA: "*In many cases, the attraction operators are the custodians of what secures Ireland's appeal as a holiday destination year after year*".

The number of admissions to visitor attractions is testament to their importance. Based on data collected from Fáilte Ireland and other sources, it is estimated that, in 2017, almost 42 million visits were made to some 392 visitor attractions (excluding those receiving less than 500 visitors a year). These attractions are spread throughout the country, promoting tourism and economic activity which, in many locations, would not otherwise occur.

This survey of AVEA's members reveals the value of their tourism and economic contribution. Based on the data supplied by respondents, the following highlights emerge:

- **AVEA's members received an estimated 22.6 million visitors in 2018, which represented 53% of visits to all Irish attractions.**
- **AVEA's members employ an estimated 3,675 people.**
- **AVEA's members generate an estimated €489 million in revenues, a very high proportion of which flows into their local economies in wages and purchasing of goods and services.**

1.3 Executive Summary

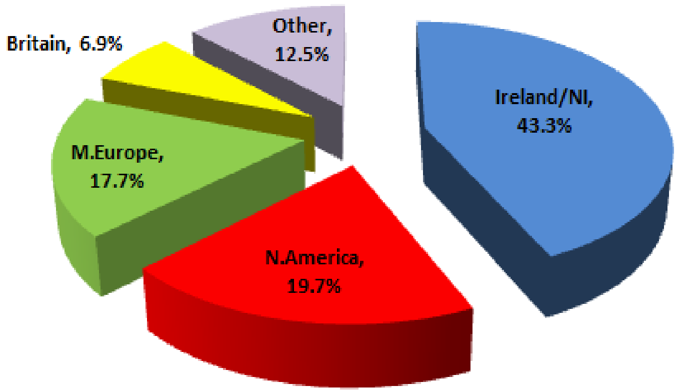
This survey was conducted in Spring 2019, and gathered information on AVEA members' business performance in 2018. A total of 60 replies were received from the 83 members surveyed, representing a response rate of 72%. 28 (47%) of the 60 respondents are located in Dublin, and 33 (53%) received more than 110,000 visitors in 2018.

Visitors

In total, the 60 survey respondents received 19.5 million visitors in 2018, an average of 325,000 per site. This total was the equivalent of 46% of visitors to all Irish attractions in 2017. Overall, AVEA's members, including non-respondents, received an estimated 22.6 million visitors in 2017 which represented 53% of visitors to all Irish attractions.

Figure A: Origin of Visitors

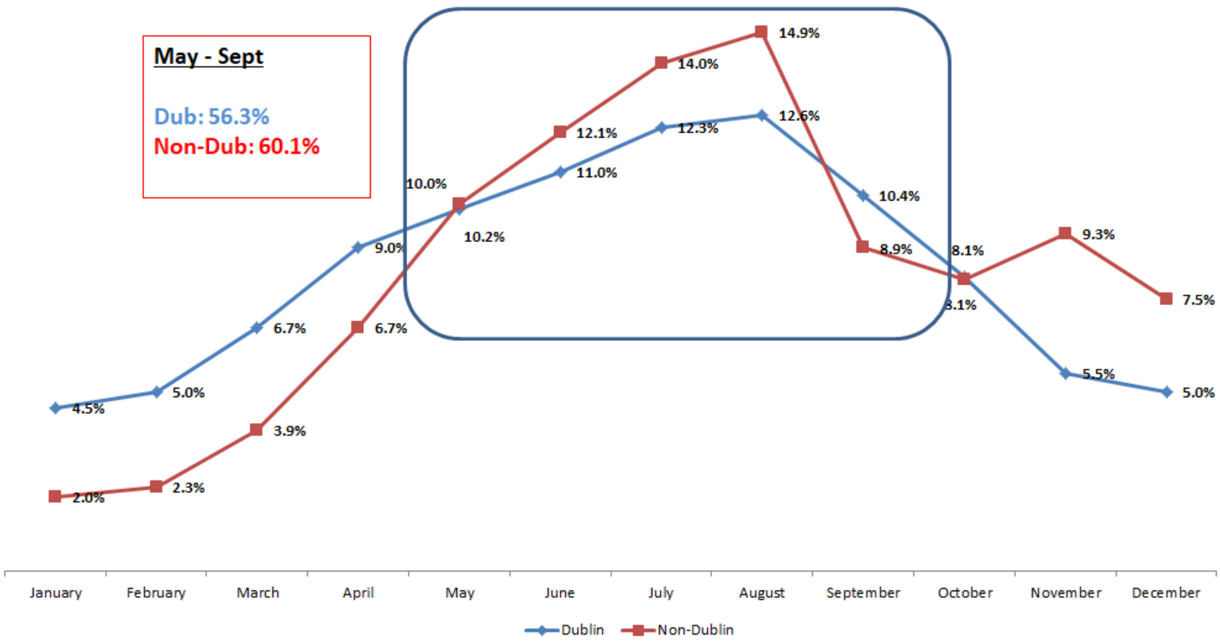
Note: 'Other Europe' includes all Mainland European countries except France and Germany. 'Other' includes African and South American countries, and visitors whose origin is unknown.



The origin of visitors received by respondents in 2018 is detailed in Figure A. The domestic market, including Northern Ireland, is the largest single source of visitors. North America account for almost a fifth indicating that Americans are significant consumers of attractions. On the other hand, the share of British visitors is very low relative to the large number of arrivals from Britain.

Two-thirds of all admissions to respondent attractions in 2018 purchased individual tickets. Not all were at full price - this category includes concessions (students, pensioners, etc.), families and children. Education groups accounted for 10% of the total, while other groups, including tour groups, accounted for 21% of admissions.

Figure B: Seasonal Distribution of Admissions

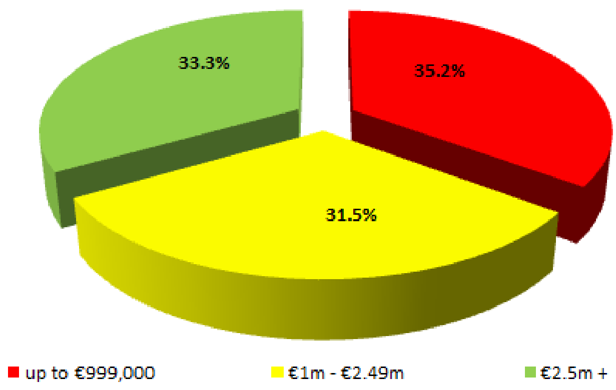


The seasonal pattern of admissions reflects the general seasonality of tourism in Ireland. As Figure B above highlights, the seasonal peaking of demand during the summer months is much more pronounced at sites outside Dublin than for those in Dublin. This reflects the off-peak flows in city break demand.

Revenue

The distribution of respondents by level of revenue is detailed in Figure 4.2. In total, the 54 respondents who provided information on this point generated €385 million in revenue in 2018. Based on this figure, it is estimated that AVEA's members in total generated €489 million in revenue in 2018. At many sites (35%), annual revenue amounts to less than €1 million. Another 32% earn between €1 million and €2.5 million, with a third (33%) earning over €2.5 million.

Figure C: Distribution of Respondents by Revenue



Ticket sales account for by far the largest share of revenue - 53% for sites in Dublin and 50% for those outside Dublin. Retail and food & beverage sales are the next most important sources. There are some differences between sites in Dublin and those elsewhere, with food & beverage sales being more important as a share of revenue for sites outside Dublin.

Prices

The data in Table 1 overleaf shows that there is, potentially, an average of between €18 and €19 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. However, the figure for ticket sales does not take into account discounted ticket sales - a comparison of survey responses with advertised admission prices shows that it is based on the full adult ticket price.

Table 1: 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	9.04	4.44	4.63
Dublin	9.67	4.16	4.14
Non-Dublin	8.26	4.89	4.91
Under 110,000 visitors	9.11	2.73	4.55
Over 110,000 visitors	8.98	5.68	4.98

Notes: - *extreme values are excluded.*
- *F&B spend results are based on those who specifically have a retail and/or an F&B outlet.*

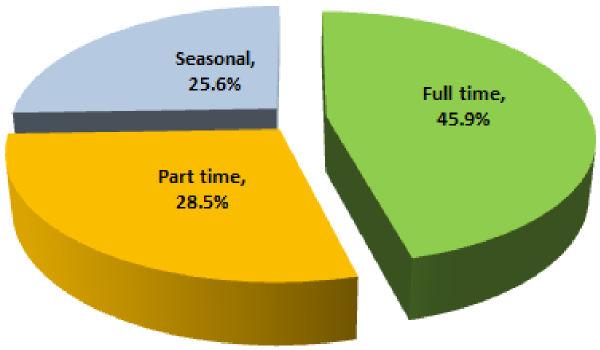
Operating Costs

Staff costs are the largest single cost item, Sites in Dublin reported that staff account for almost half (48%) of their total operating costs, as compared with 40% for sites outside Dublin. Dublin sites allocate a greater share of their operating budgets to marketing and sales (excluding staff) - 11% as opposed to 9% for sites outside Dublin. With regard to Other costs - sites outside Dublin incur a greater share of operating costs at 51% compared with 41% share for sites in Dublin.

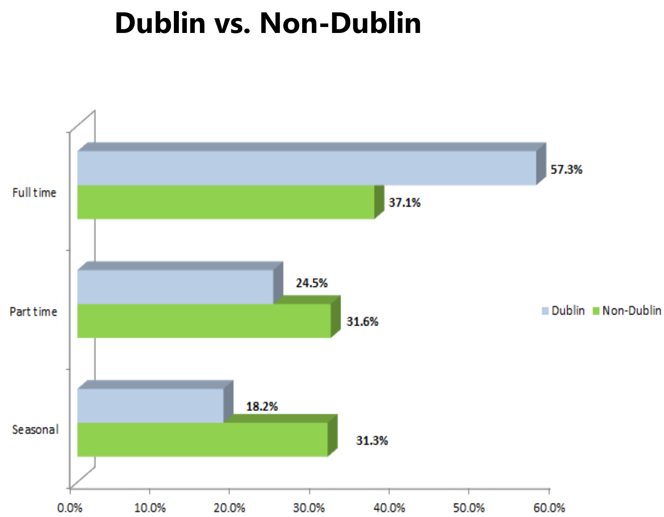
Staff

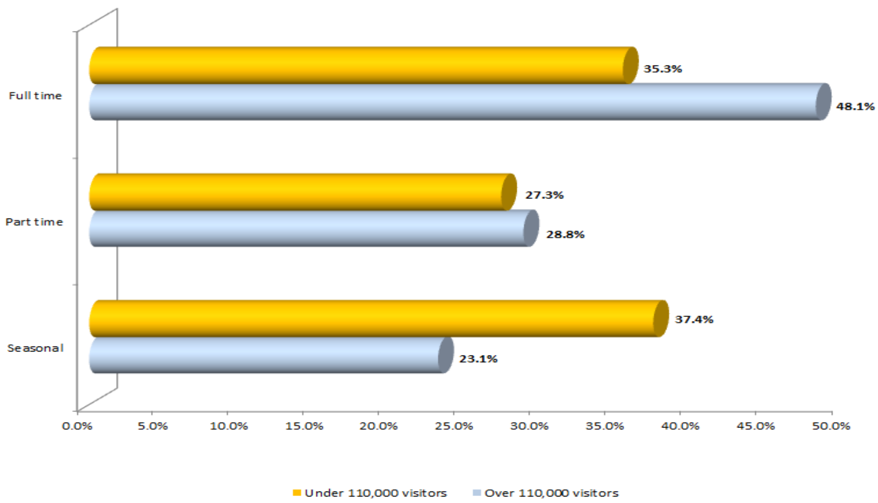
The survey respondents together employed a total of 3,164 staff in 2018, an average of 53 per site. Based on the survey responses, it is estimated that AVEA's members employ 3,675 in total. This figure highlights the importance of visitor attractions as employers. Overall, half of all of these staff are employed on a full-time basis, with the balance divided between part-time (27%) and seasonal (22%) - see Figure D overleaf.

Figure D: Employment at Respondent Attractions



Total employed by Respondents: 3,164 (average of 52.7 per site)





There is a significant difference between sites in Dublin and those outside Dublin in the structure of employment. 57% of staff at Dublin-based attractions are full-time, whereas just 37% of staff at sites outside Dublin are full-time. Reflecting the greater degree of seasonality in demand outside Dublin, a much higher proportion of staff (31%) at sites outside Dublin are employed on a seasonal basis. The corresponding figure in Dublin is just 18%.

Approximately two-thirds of the survey respondents noted that they had encountered difficulties recruiting staff in certain categories. The disciplines in which it proved most difficult to recruit suitable staff were kitchen staff, guides, sales & marketing, followed by retail and mid-management staff.

Some 73% of the 60 survey respondents employ external contractors and/or concessionaires on site. Such external providers are mostly used to manage food & beverage outlets, provide cleaning and maintenance services, and to run retail outlets.

Looking Ahead

Almost all of the survey respondents were optimistic about business in 2019. The overall average expected growth in visitor numbers is 5.3%.

There are, of course, challenges to be addressed, and respondents identified a wide range of issues. The five most commonly mentioned challenges are:

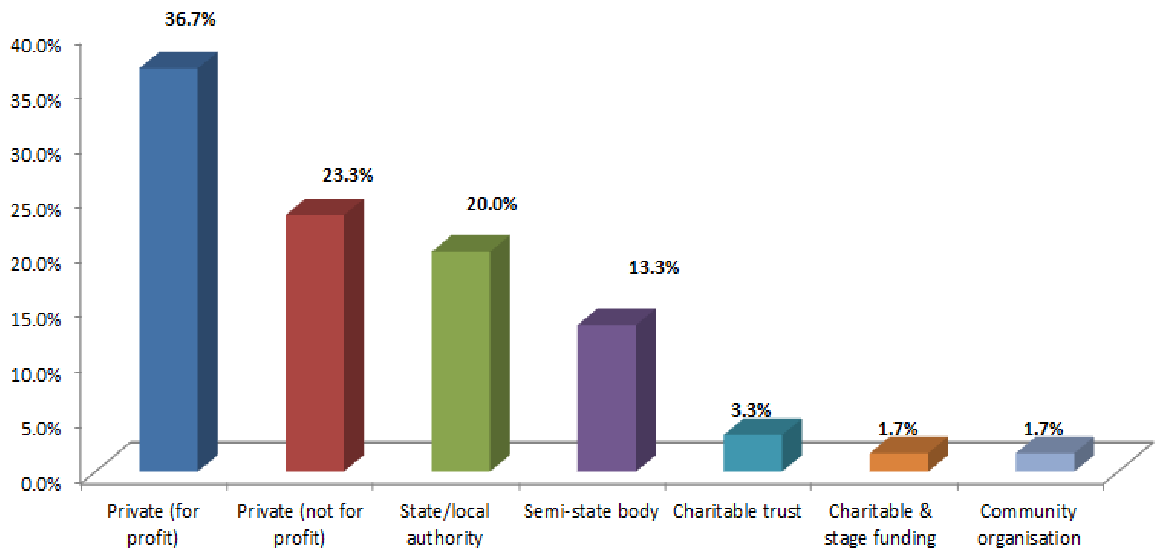
- capital investment / finance
- staff costs
- overhead costs
- sales & marketing resources
- Brexit.

2. RESPONDENTS

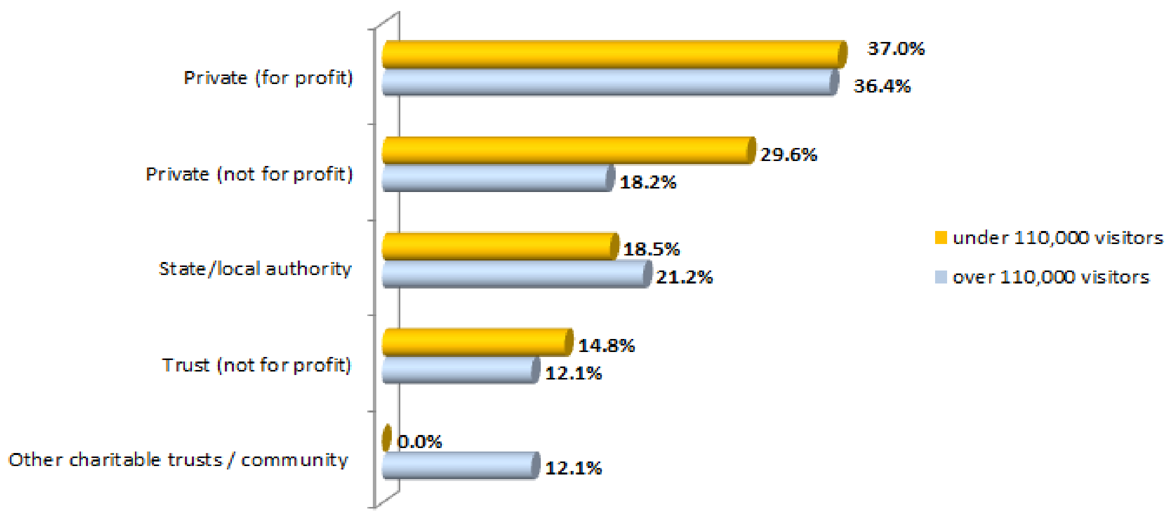
2.1 Type of Organisation

A large majority of respondents (60%) are in private companies of which a little over one-fifth are not-for-profit. In terms of visitor numbers, for-profit attractions have a slightly higher average than not-for-profits and state/local authority sites.

Figure 2.1: Distribution of Respondents by Organisation Type



Breakdown by Number of Visitors



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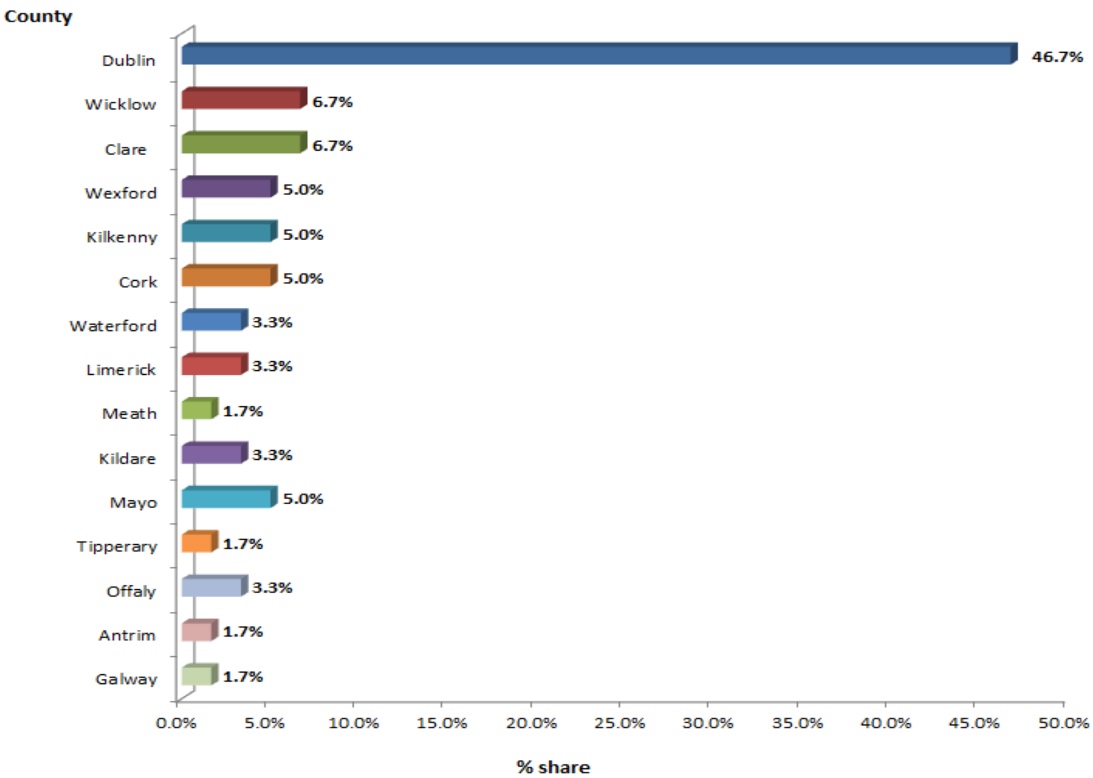
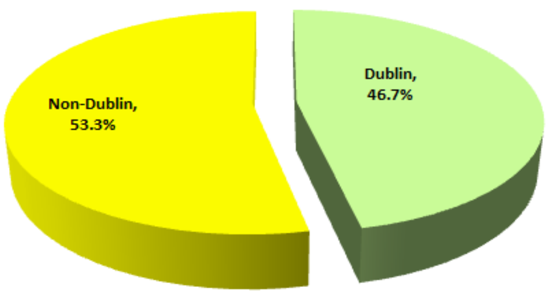
2.2 Location

28 of the 60 respondents (46.7%) are based in Dublin. Some 13 other counties in the Republic of Ireland and one in Northern Ireland are represented. This distribution is not representative of the sector – for example, only about 17% of the 392 sites in Ireland 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 - ***60 respondents***





3. VISITOR PROFILES

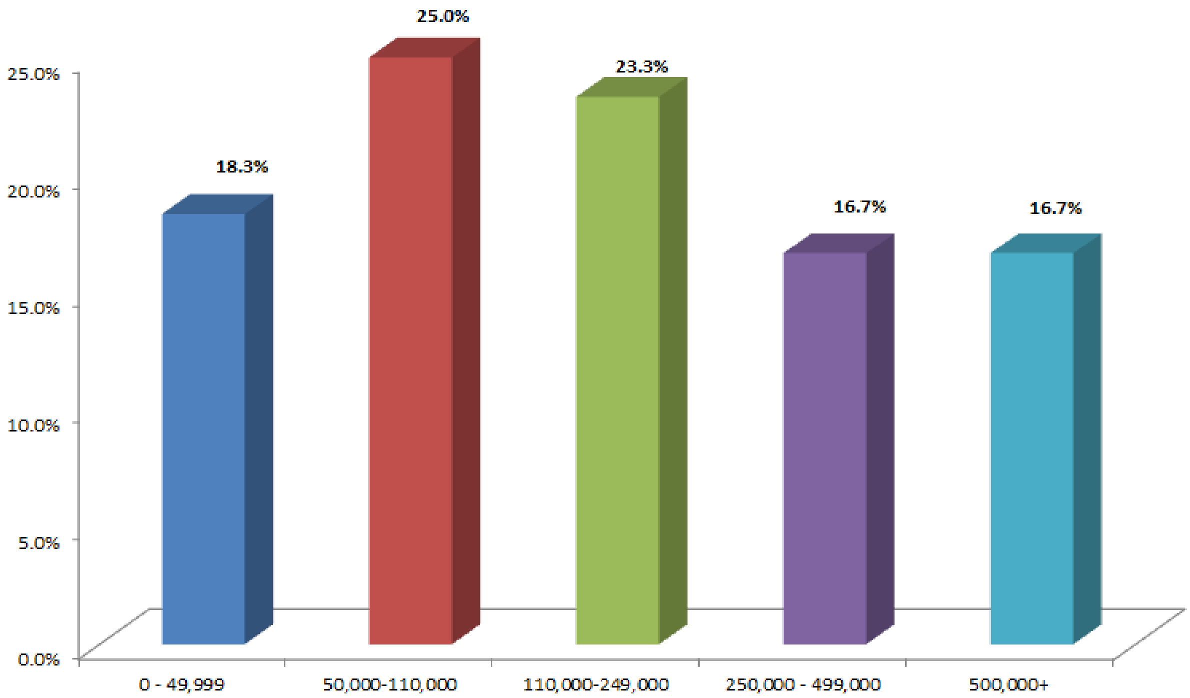
3.1 Number of Visitors Handled in 2018

In total, the 60 survey respondents received 19,455,319 visitors in 2018, an average of 324,255 per site. This total was the equivalent of 46.7% of visitors to all Irish attractions in 2017. Overall, AVEA's members, including non-respondents, received an estimated 22.6 million visitors in 2018 which is the equivalent of 53% of visitors to all Irish attractions in 2017.

The distribution of respondents by scale of visitor numbers is shown in the following table and chart below:

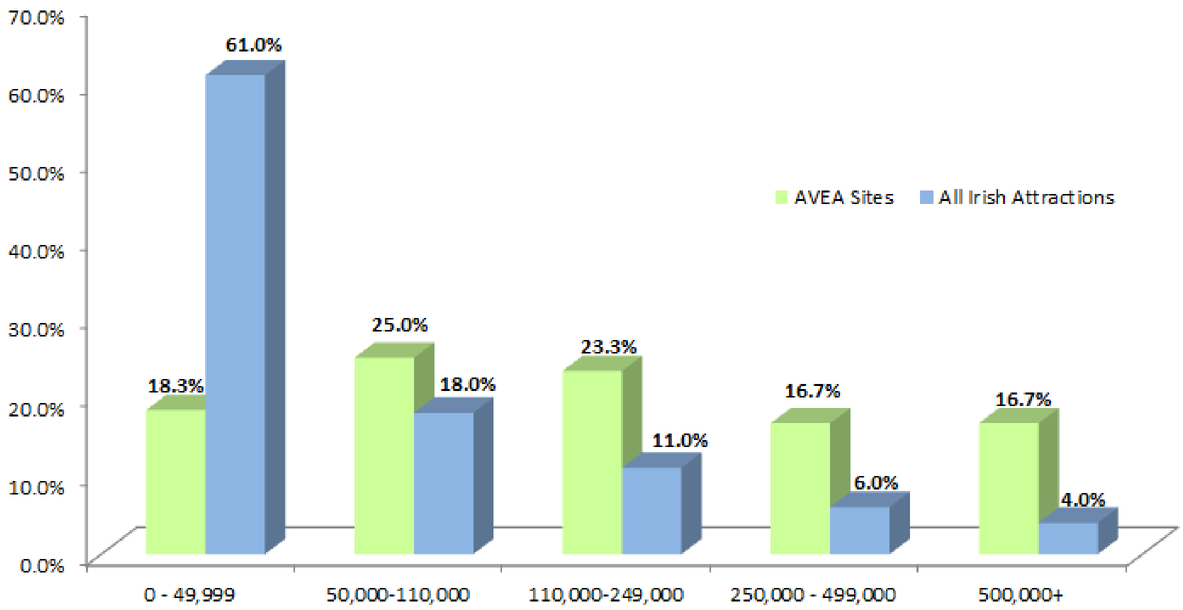
Visitors	No. of Sites	%
Up to 49,999	11	18.3%
50,000 -110,000	15	25.0%
110,000 - 249,999	14	23.3%
250,000 - 499,000	10	16.7%
500,000+	10	16.7%
Total	**60**	**100.0%**

Figure 3.1: Distribution of Respondents by Scale of Visitation - *60 respondents*



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 almost two-thirds of all attractions in Ireland receive fewer than 50,000 visitors a year.

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



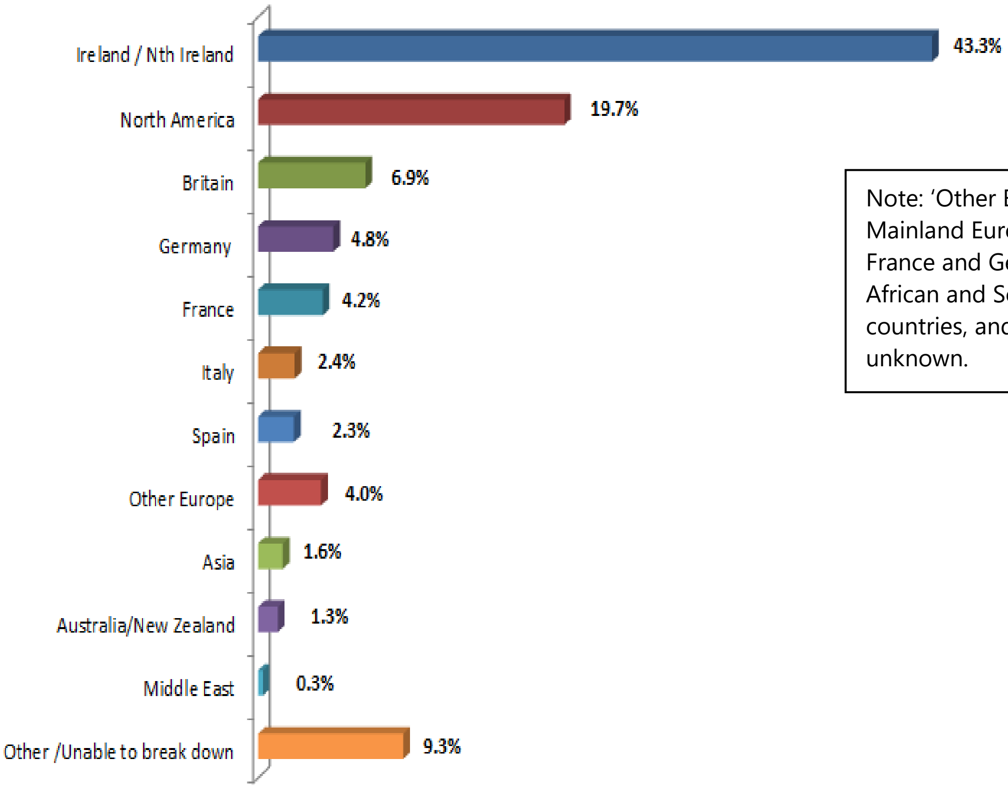
AVEA's representation of the Irish visitor attractions sector by size category is as follows:

Scale of Visitation	AVEA share of attractions in this category
500,000+	59%
250,000 - 499,999	64%
110,000 - 249,999	45%
50,000 - 109,999	32%
0 - 49,999	7%

3.2 Origin of Visitors

The origin of visitors received by respondents in 2018 is detailed in Figure 3.3. The domestic market, including Northern Ireland, is the largest single source of visitors, with North America not far behind. Americans are significant consumers of attractions. On the other hand, the share of British visitors is very low relative to the large number of arrivals from Britain.

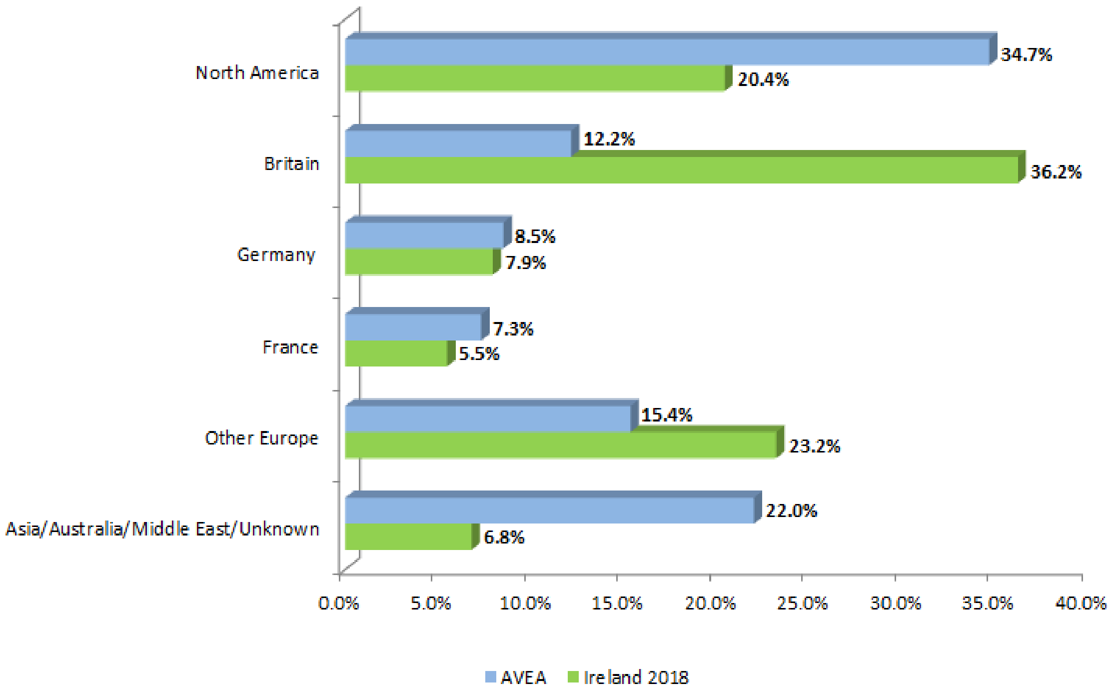
Figure 3.3: Origin of Visitors by Main Market - *49 respondents*



Note: 'Other Europe' includes all Mainland European countries except France and Germany. 'Other' includes African and South American countries, and visitors whose origin is unknown.

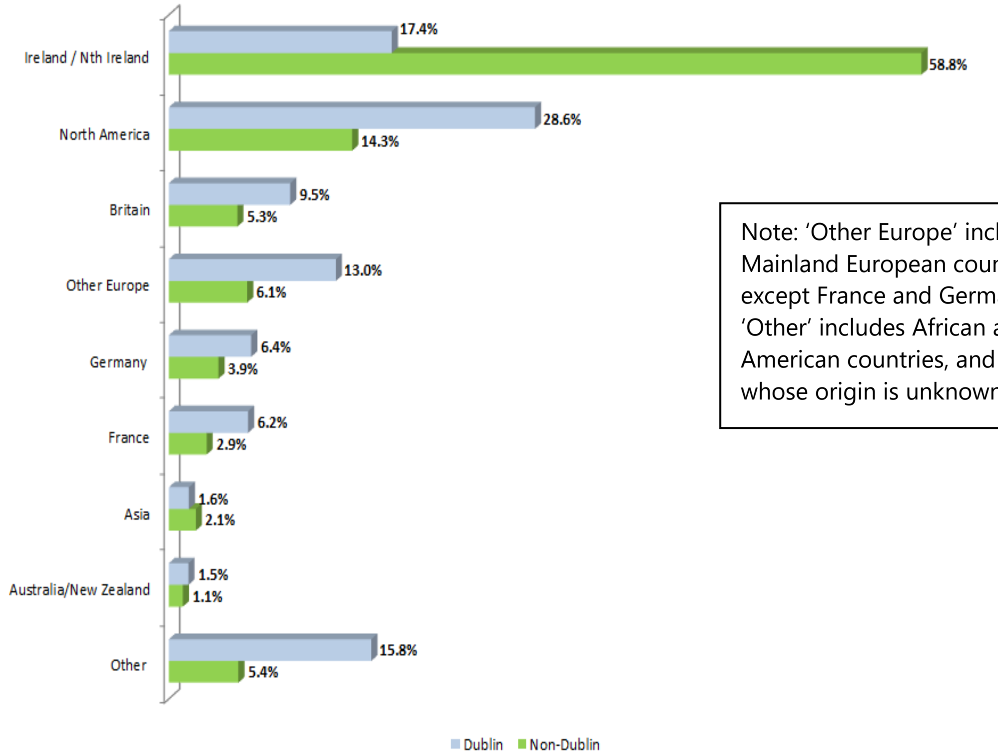
The distribution of arrivals at AVEA sites by nationality is compared to that of tourist arrivals in Ireland in Figure 3.4. Domestic arrivals are excluded. The respective distributions suggest that visitor attractions are appealing strongly to Americans and visitors from Mainland Europe, but are much less successful in attracting British visitors.

Figure 3.4: Origin of AVEA Visitors compared to all Tourist Arrivals



There were distinct differences between respondents in Dublin and those outside Dublin in terms of their respective visitor mixes by source market, as shown in Figure 3.5. In essence, sites outside Dublin are much more dependent on the domestic market while sites in Dublin have a more international visitor profile.

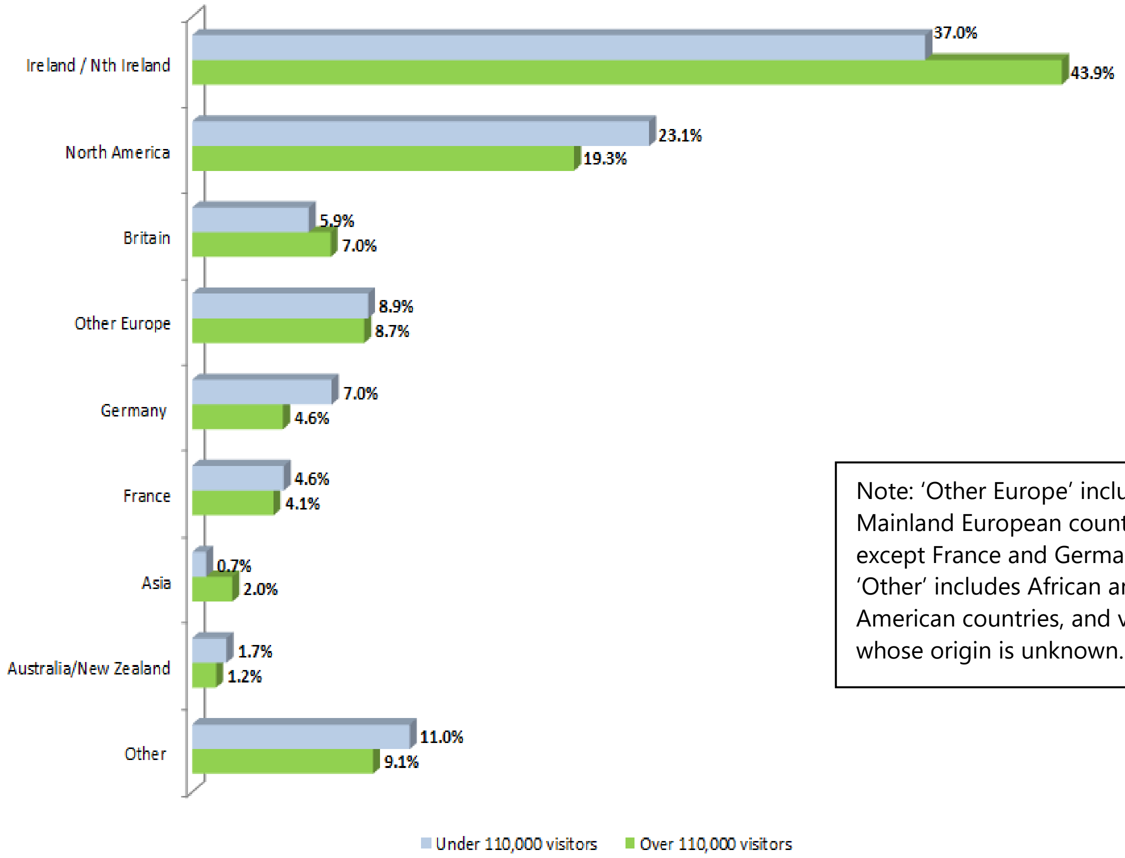
Figure 3.5: Differences in Visitor Origin - Dublin vs Non-Dublin Sites



Note: 'Other Europe' includes all Mainland European countries except France and Germany. 'Other' includes African and South American countries, and visitors whose origin is unknown.

The relative scale of attractions, as measured by their number of visitors, is also reflected in the distribution of visitors by source market. This is highlighted in Figure 3.6 which shows that sites receiving fewer than 110,000 visitors are slightly less dependent on the domestic market than those receiving larger numbers.

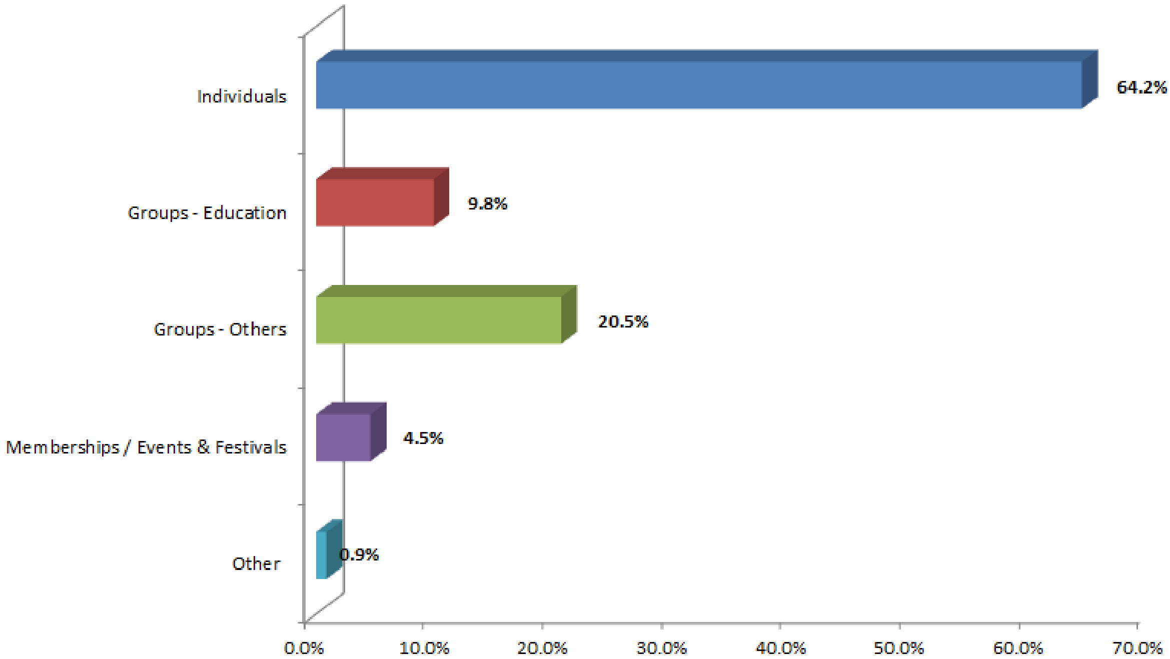
Figure 3.6: Differences in Visitor Origin by Scale of Visitation



Note: 'Other Europe' includes all Mainland European countries except France and Germany. 'Other' includes African and South American countries, and visitors whose origin is unknown.

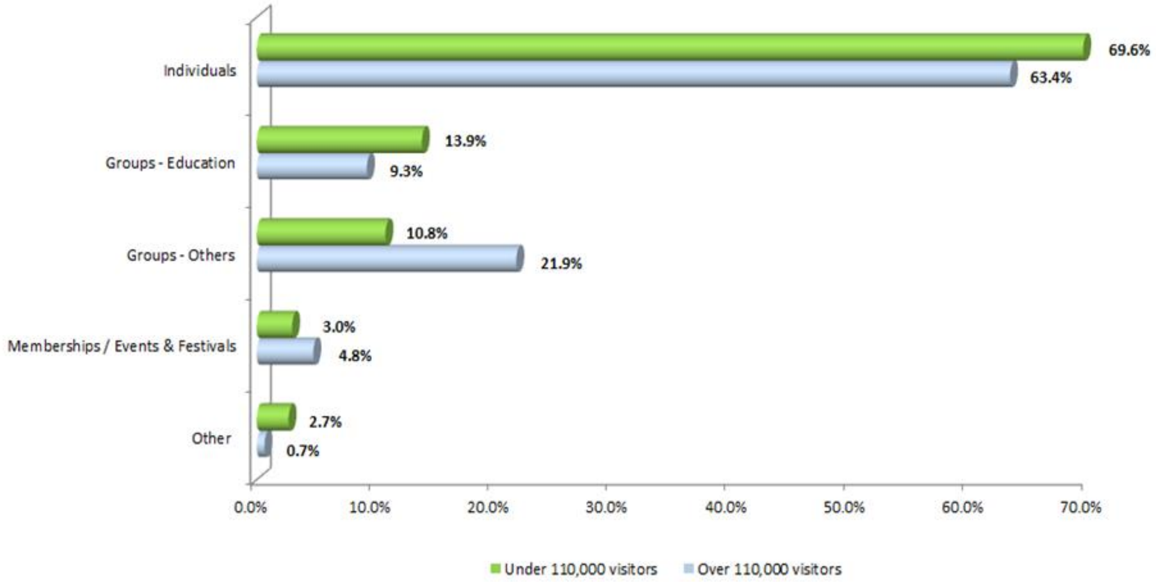
3.3 Visitor Ticket Categories

Figure 3.7: Distribution of Admissions by Ticket Category - ***52 respondents***



Almost two-thirds of all admissions to respondent attractions in 2018 purchased individual tickets. Not all were at full price - this category includes concessions (students, pensioners, etc.), families and children. Education groups accounted for 9.8% of the total, while other groups, including tour groups, accounted for 20.5% of admissions.

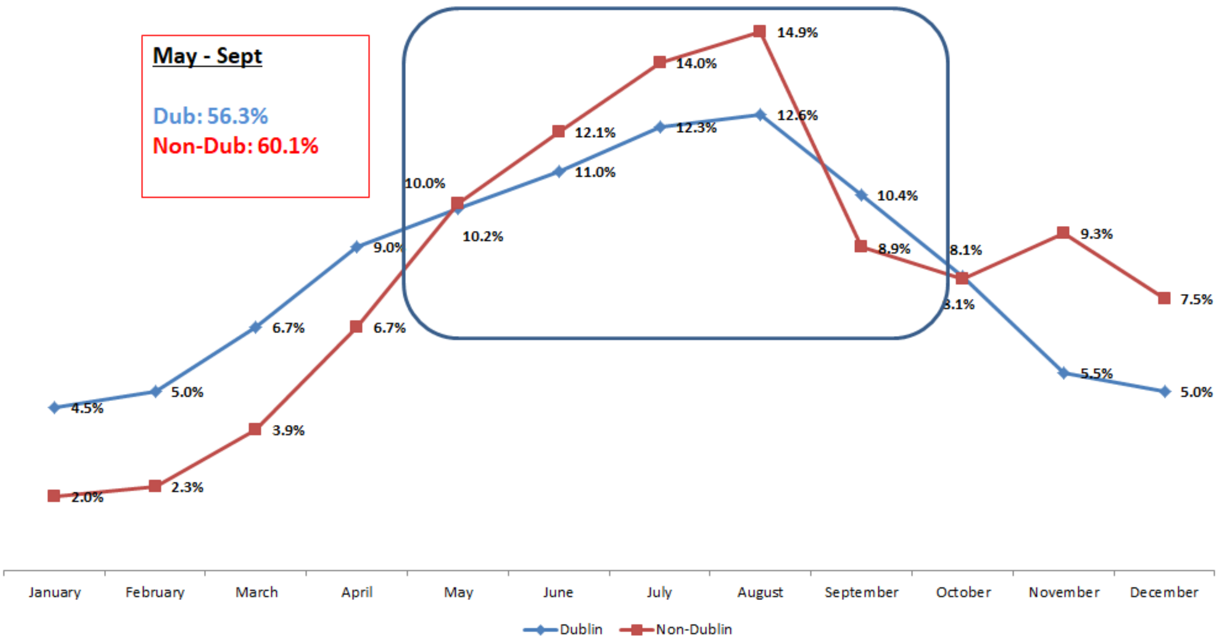
Figure 3.8: Distribution of Admissions by Ticket Category and Visitor Volume



Overall, in terms of admissions by ticket category, there is little difference between attractions with more than 110,000 visitors a year and those with fewer than 110,000. The category where the greatest difference emerges is Other Groups which accounted for 10.8% of all admissions to attractions receiving fewer than 110,000 visitors but almost 22% of those receiving more than 110,000. Larger attractions also had marginally more admissions in the membership and events/festivals category.

3.4 Seasonality

Figure 3.9: Seasonal Distribution of Admissions - *55 respondents*



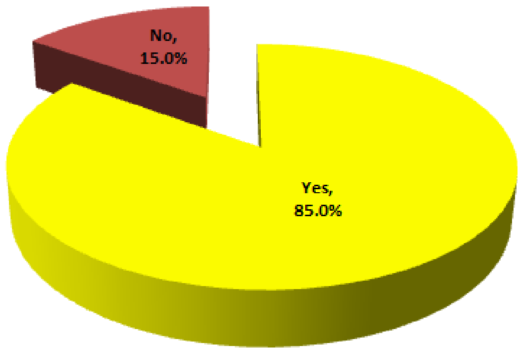
The seasonal pattern of admissions reflects the general seasonality of tourism in Ireland. As Figure 3.9 highlights, the seasonal peaking of demand during the summer months is much more pronounced at sites outside Dublin than for those in Dublin. This reflects the off-peak flows in city break demand.

4. FINANCIAL MATTERS

4.1 Revenue

51 (85%) of the 60 respondents charge for admission.

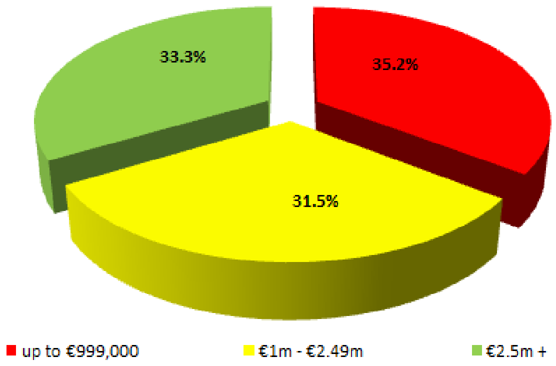
Figure 4.1: Proportion of Respondents who Charge Admission fees



The distribution of respondents by level of revenue is detailed in Figure 4.2. In total, the 54 respondents who provided information on this point generated €385 million in revenue in 2018. Grossing up on the basis of average visitor expenditure produces an estimated total revenue for all AVEA members of €489 million. At many sites (35%), annual revenue amounts to less than €1 million. Another 32% earn between €1 million and €2.5 million, with a third (33%) earning over €2.5 million.

	Actual	%
Up to €999,000	19	35.2%
€1m - €2.49m	17	31.5%
€2.5m +	18	33.3%
Total	**54**	**100.0%**

Figure 4.2: Distribution of Respondents by Revenue



The principal sources of revenue for respondents are listed in Figure 4.3. Ticket sales account for by far the largest share of revenue - 58% for sites in Dublin and 50% for those outside Dublin. Retail and food & beverage sales are the next most important sources.

As Figure 4.3 shows, there are some differences between sites in Dublin and those elsewhere, with food & beverage sales being much more important as a share of revenue for sites outside Dublin. This is to be expected as tourists visiting attractions outside Dublin are frequently travelling some distance to reach them[2], and having a snack or meal at the attraction's forms part of the overall visitor experience. In Dublin, and other urban destinations, there is an ample supply of alternatives to the cafés at visitor attractions. Private hires, events and festivals are more significant sources of revenue in Dublin than elsewhere, but their overall contribution is small.

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[2] Fáilte Ireland's consumer research at visitor attractions in 2016 found that overseas tourists had typically travelled for between 80 and 100 minutes to reach attractions in Ireland's Ancient East and the Wild Atlantic Way.

Figure 4.3: Distribution of Revenue by Source - *Dublin vs. Non-Dublin*

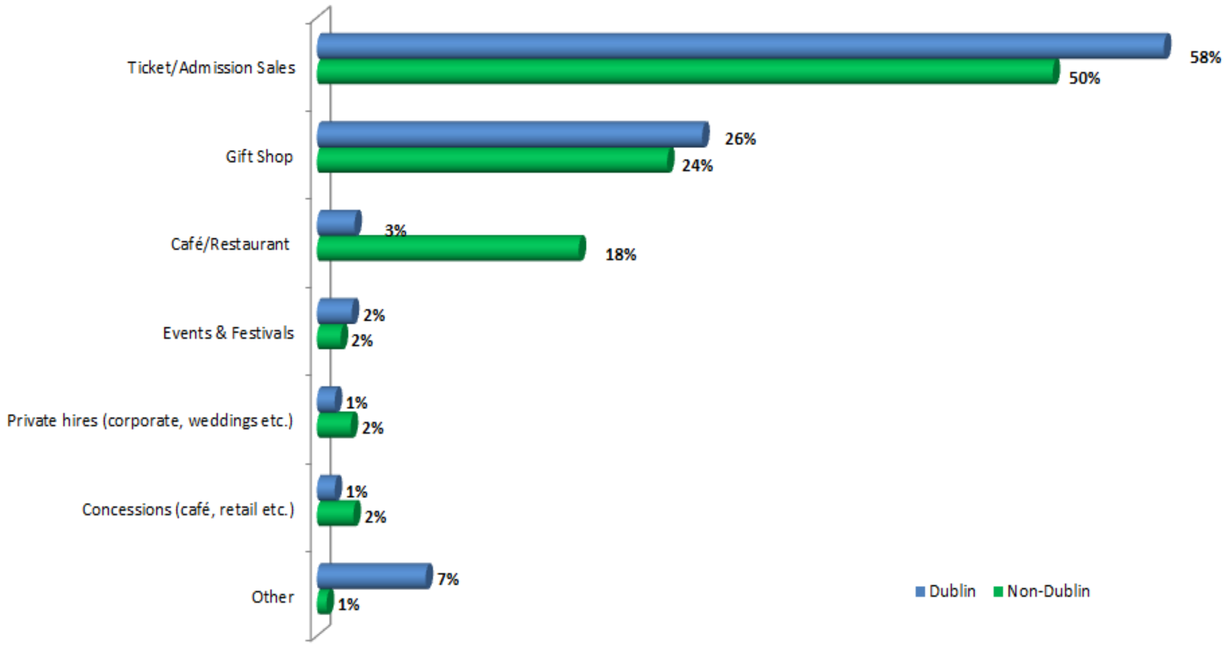
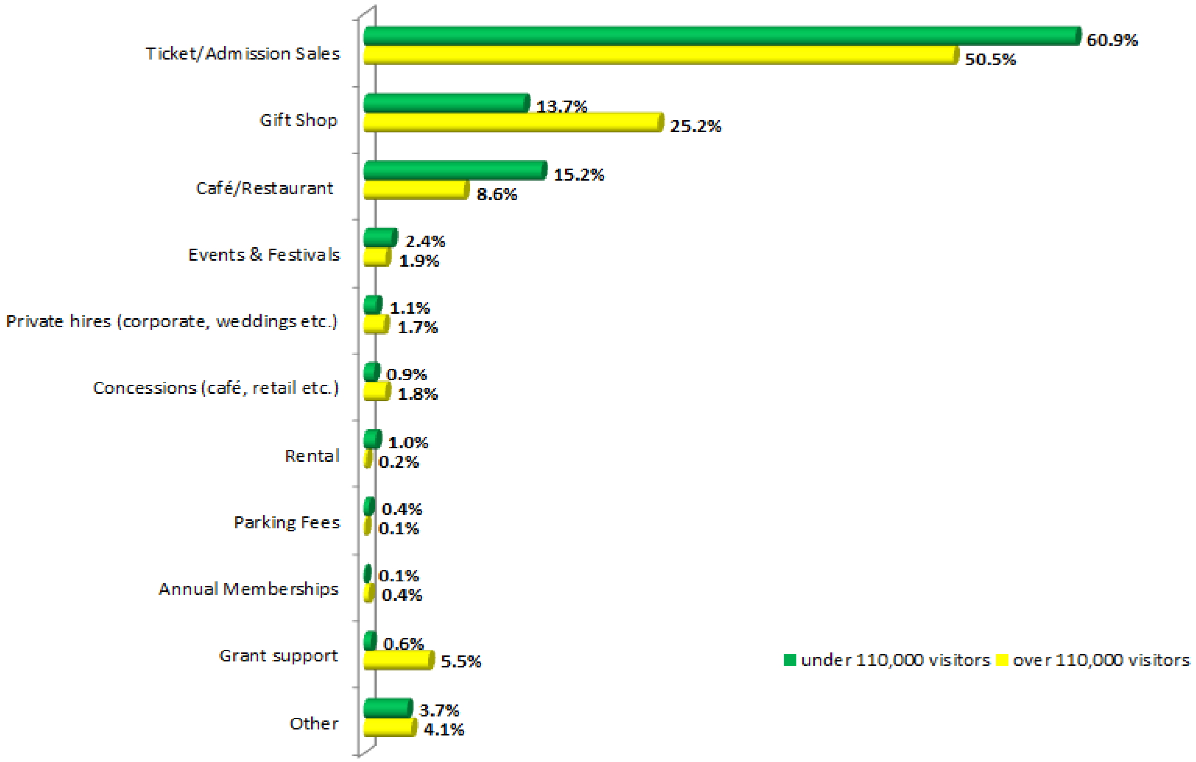


Figure 4.4: Breakdown of Revenue Sources by Number of Visitors



There are some differences between sites attracting fewer than 110,000 visitors and those with more than 110,000 in the relative importance of different sources of revenue (Figure 4.4). While in both categories, ticket sales dominate. retail is far more significant at larger sites, while smaller sites generate a much larger share of revenue from their cafés compared to larger sites. The latter reflects the fact that many of the smaller sites are outside Dublin.

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.

Their responses were aggregated and the results are provided in Table 4.1 below.

Table 4.1: 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	9.04	4.44	4.63
Dublin	9.67	4.16	4.14
Non-Dublin	8.26	4.89	4.91
Under 110,000 visitors	9.11	2.73	4.55
Over 110,000 visitors	8.98	5.68	4.98

Notes: - *extreme values are excluded.*
- *F&B spend results are based on those who specifically have a retail and/or an F&B outlet.*

The data in Table 4.1 show that there is, potentially, an average of between €18 and €19 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. However, the figure for ticket sales does not take into account discounted ticket sales - a comparison of survey responses with advertised admission prices shows that it is based on the full adult ticket price.

Among survey respondents, average ticket prices are higher at Dublin sites. Average retail and food & beverage sales levels are higher outside Dublin.

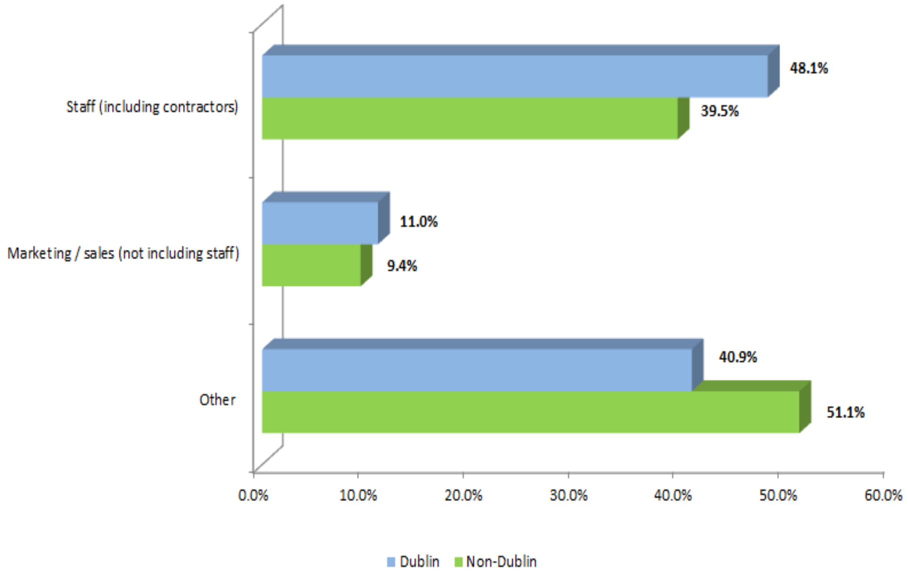
Admission prices are higher at sites receiving fewer than 110,000 visitors. On the other hand, the average retail spend at sites receiving more than 110,000 visitors is more than twice as high as that at sites receiving fewer than 110,000.

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 4.5.

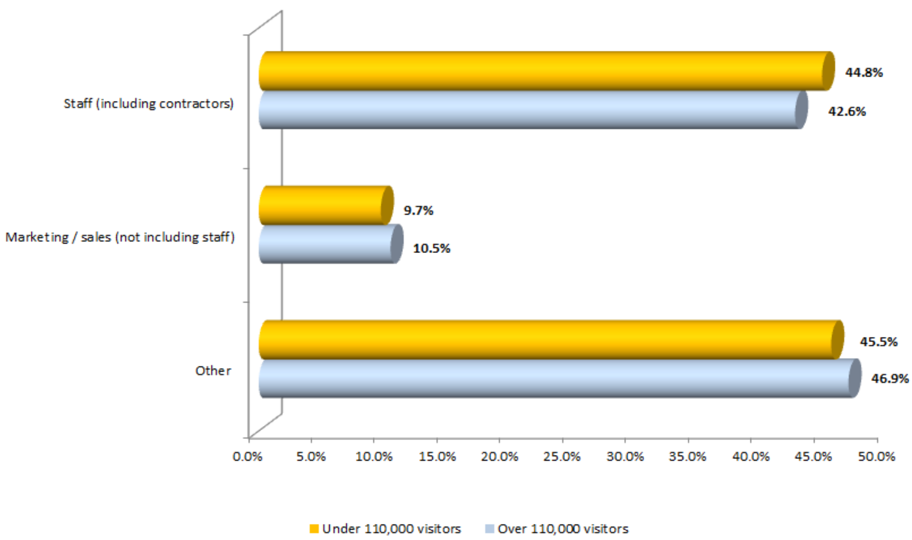
Staff costs are the largest single item, given that multiple different costs are included under 'Other Costs'. Sites in Dublin reported that staff account for almost half (48%) of their total operating costs, as compared with 40% for sites outside Dublin. Dublin sites allocate a greater share of their operating budgets to marketing and sales (excluding staff) - 11% as opposed to 9% for sites outside Dublin. With regard to Other costs - sites outside Dublin incur a greater share of operating costs at 51% compared with 41% share for sites in Dublin.

Figure 4.5: Distribution of Operating Costs



As Figure 4.6 shows, there is only a small difference between sites attracting over 110,000 visitors and those attracting fewer than 110,000 visitors in terms of the share of staff costs in the total. However, sites with more than 110,000 visitors allocate a marginally larger share of their operating budget to marketing - 11% compared to 10% for sites receiving less than 110,000 visitors. This is attributable, in part, to their larger overall budgets.

Figure 4.6: Distribution of Operating Costs by Scale of Activity



4.4 The Impact of the VAT increase on Pricing

Two-thirds of respondents have increased their prices for 2019. The VAT increase was a significant factor for half of these and, for many, it impacted both on the size of the increase and on the extent to which they are able to retain the financial benefits of the increase.

Figure 4.7: Have you increased your ticket prices for 2019?

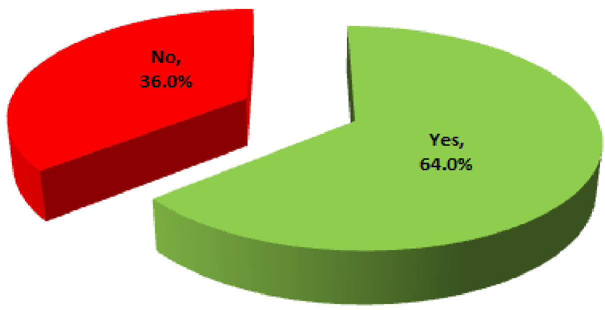


Figure 4.8: If Yes, by what percentage?

The overall average increase for those who increased prices was 8.2%.

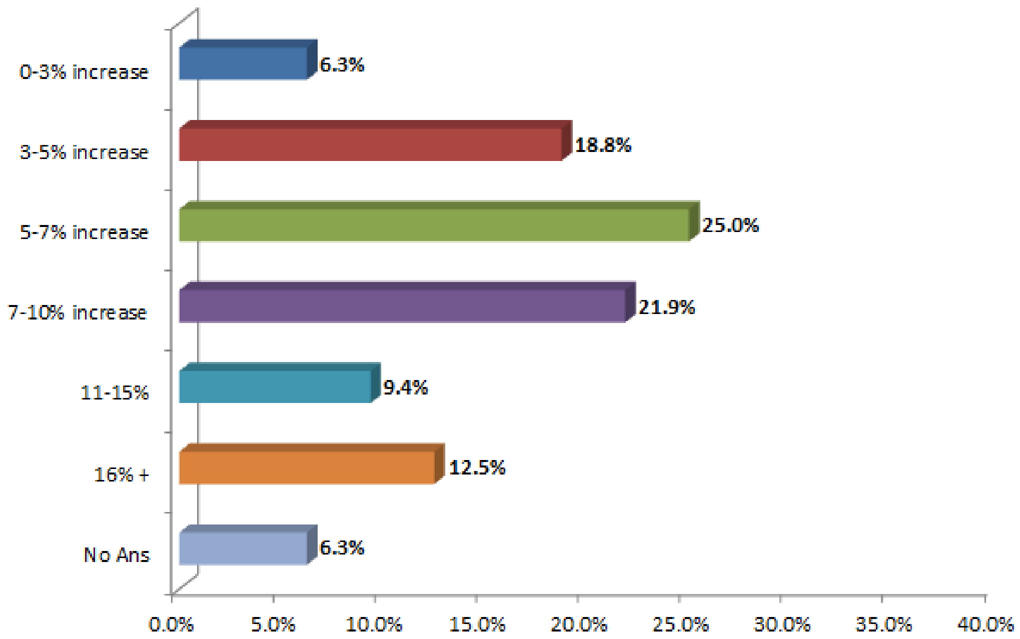
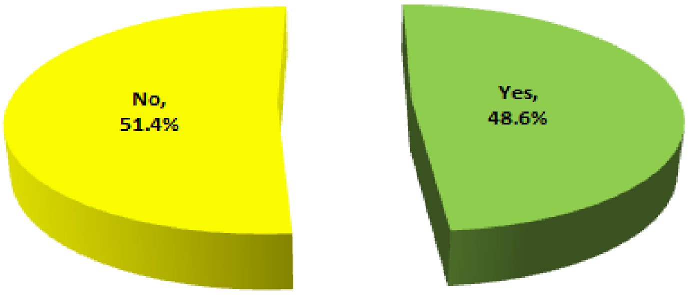
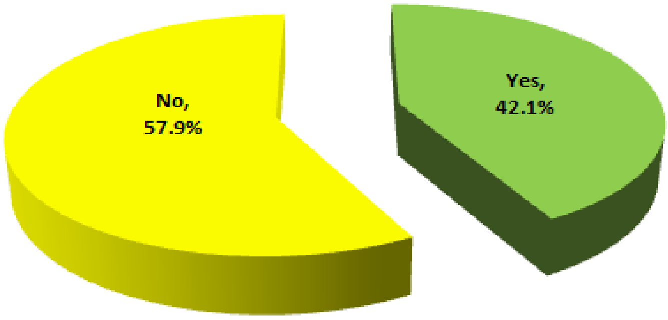


Figure 4.9: Has the increase been caused by the VAT increase?



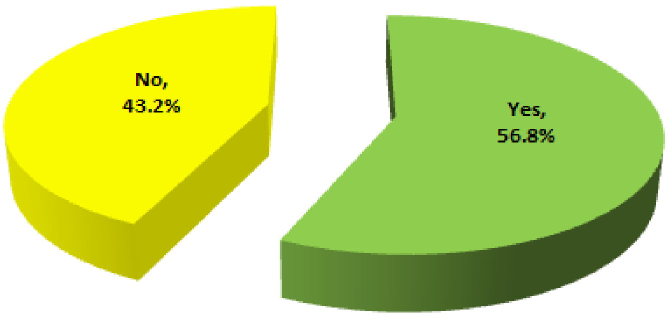
Half of those who increased their price did so in response to the VAT increase. The rest presumably had planned their price increase.

Figure 4.10: Has the increase resulted in a larger price increase than originally planned?



Over two-in-five of those who increased their prices pushed them up further than originally planned as a result of the price increase. Essentially, this was the group who had planned an increase anyway.

Figure 4.11: Has the increase in VAT wholly or partially absorbed a planned price increase?



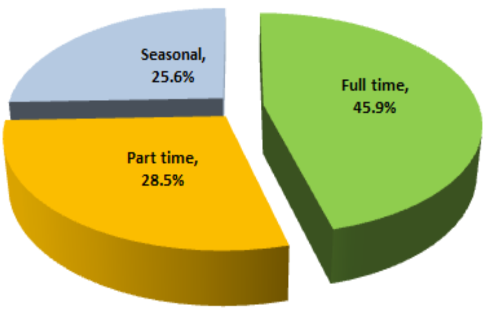
Of particular concern to respondents is that almost 60% of those who increased their prices did not gain a matching financial benefit as the increase was wholly or partially taken by VAT.

5. STAFF

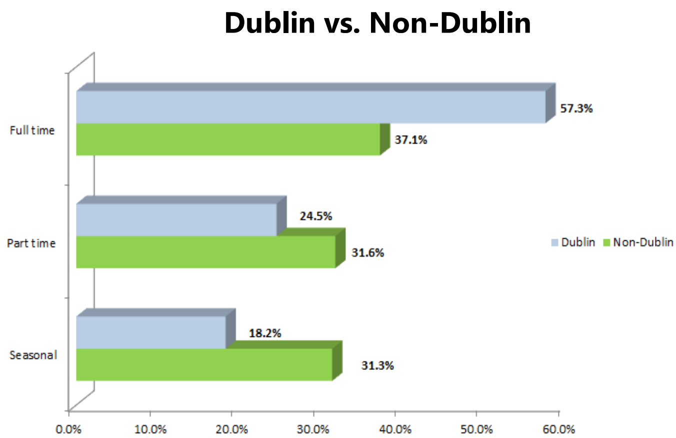
5.1 Staff Employed

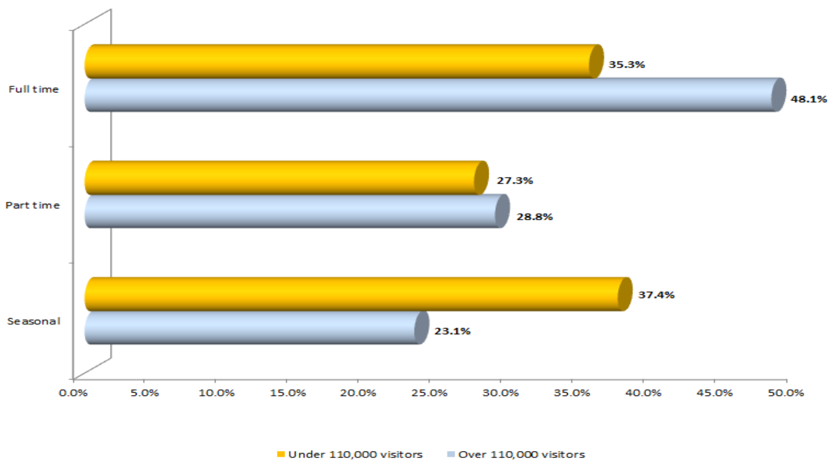
The survey respondents together employed a total of 3,164 staff in 2018, an average of 52.7 per site. Based on the average staff:visitor ratio, it is estimated that the 83 AVEA members employ 3,675 staff. This figure highlights the importance of visitor attractions as employers. Overall, almost half (46%) of these staff are employed on a full-time basis, with the balance divided between part-time (29%) and seasonal (26%).

Figure 5.1: Employment at Respondent Attractions



Total employed by Respondents: 3,164 (average of 52.7 per site)





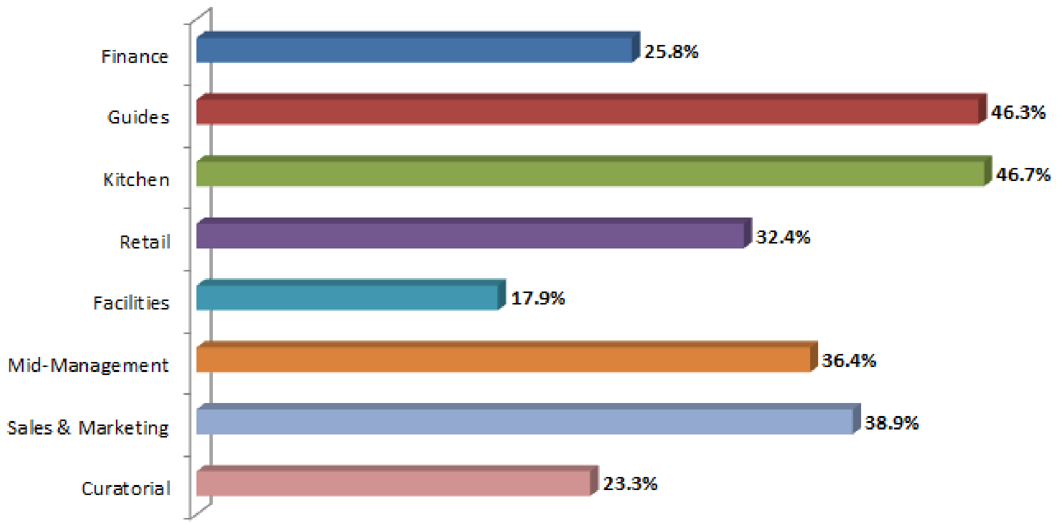
There is a significant difference between sites in Dublin and those outside Dublin in the structure of employment. 57% of staff at Dublin-based attractions are full-time, whereas just 37% of staff at sites outside Dublin are full-time. Reflecting the greater degree of seasonality in demand outside Dublin, a much higher proportion of staff (31%) at sites outside Dublin are employed on a seasonal basis. The corresponding figure in Dublin is just 18%.

There is a difference in the employment structure at sites receiving more than 110,000 visitors compared to those receiving fewer than 110,000. While the part-time staff proportion levels remain very similar (27% and 28%), a higher proportion (48%) of staff at larger sites are employed on a full-time basis compared to just 35% at sites receiving less than 110,000 visitors. The inverse applies with respect to seasonal staff.

5.2 Staff Recruitment Issues

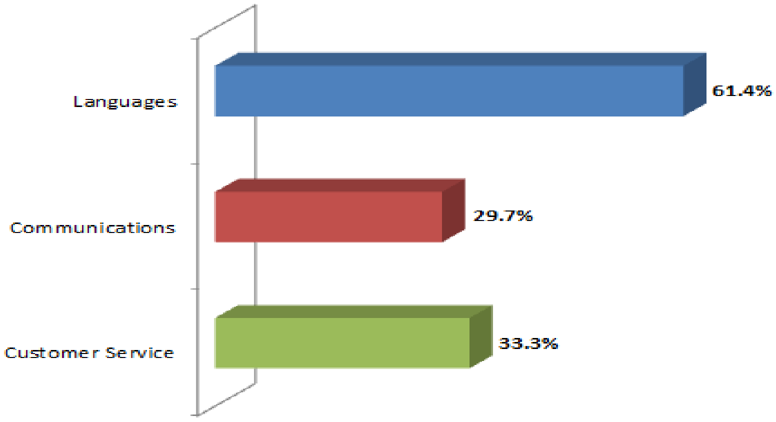
Between 28 and 41 survey respondents noted that they had encountered difficulties recruiting staff in certain categories. These categories are highlighted in Figure 5.2. The disciplines in which it proved most difficult to recruit suitable staff were kitchen staff, guides, sales & marketing, followed by retail and mid-management staff.

Figure 5.2: Staff Categories in which Respondents Experienced Recruitment Difficulties



With regard to skill deficits, the principal areas of shortfall were languages, customer service and communications skills - see Figure 5.3.

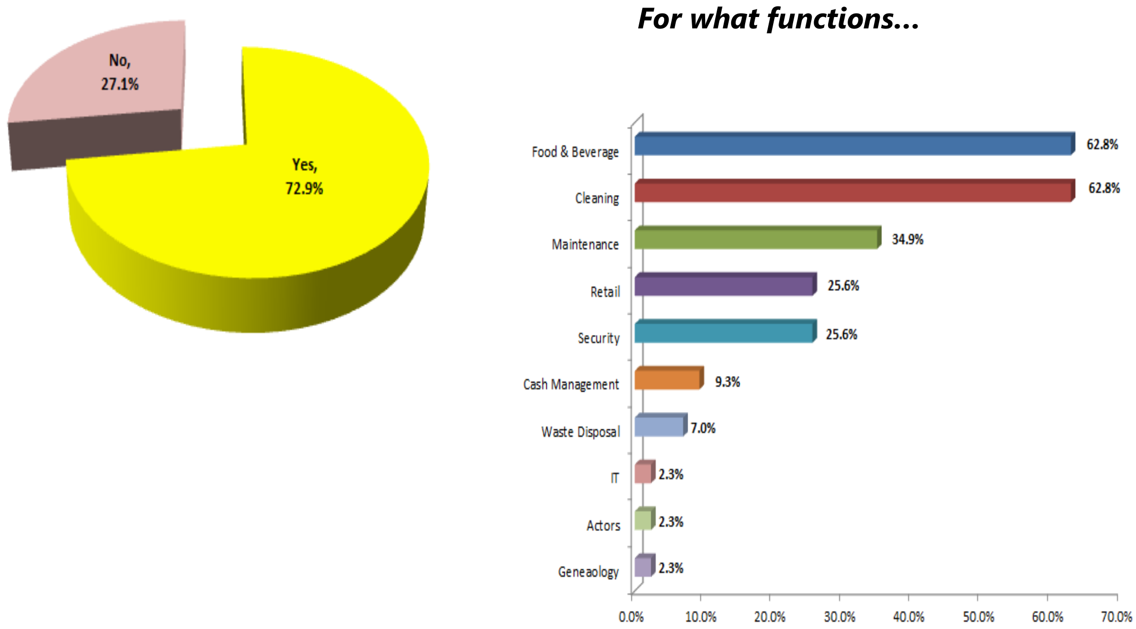
Figure 5.3: Skills Deficits in New Staff Recruitment



5.3 Use of External Contractors / Concessionaires

73% of the 60 survey respondents employ external contractors and/or concessionaires on site. As Figure 5.4 shows, such external providers are mostly used to manage food & beverage outlets, provide cleaning and maintenance services, and to run retail outlets.

Figure 5.4: Use of External Contractors / Concessionaires



5.4 Systems

Respondents reported on their use of Electronic Point of Sale (EPOS) / Integrated Ticketing systems and the availability of on-line ticket sales. As Figure 5.5 shows, 77% of respondents have integrated ticketing systems, and 80% offer admission tickets on-line. These high rates of use suggest that there has been considerable investment in operating technology over the past 10 to 15 years. However, the proportion of tickets sold on-line remains modest - only one-third of respondents selling tickets on-line sell more than 16% of their tickets through this channel.

Figure 5.5: Use of EPOS & On-line Ticket Sales

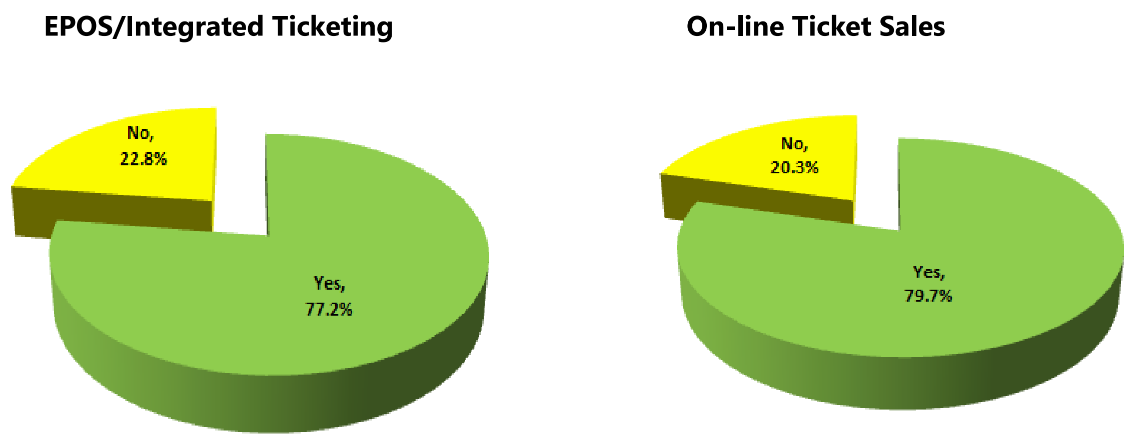
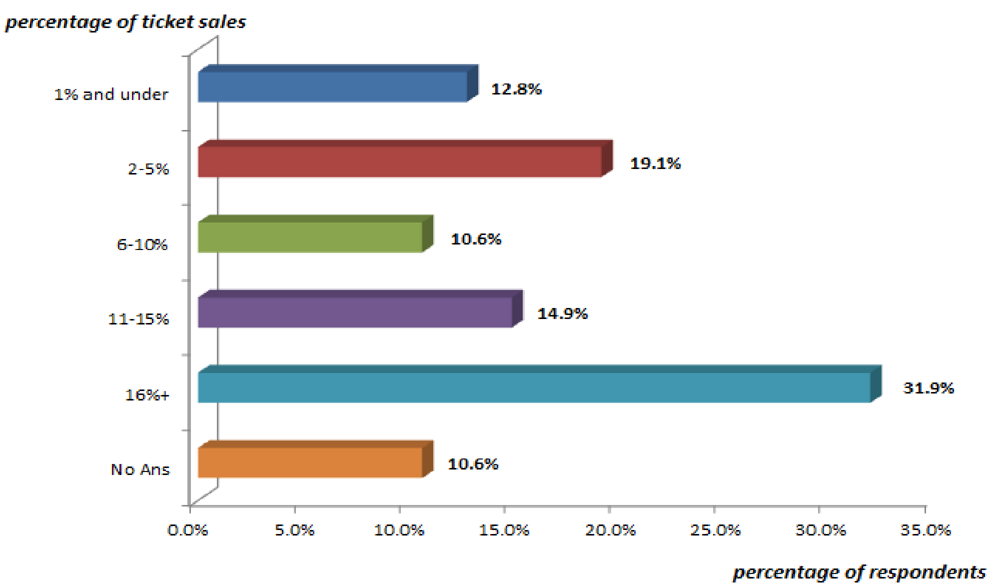


Figure 5.6: Percentage of your Ticket Sales Purchased On-Line for Sites Selling On-Line



6. LOOKING AHEAD

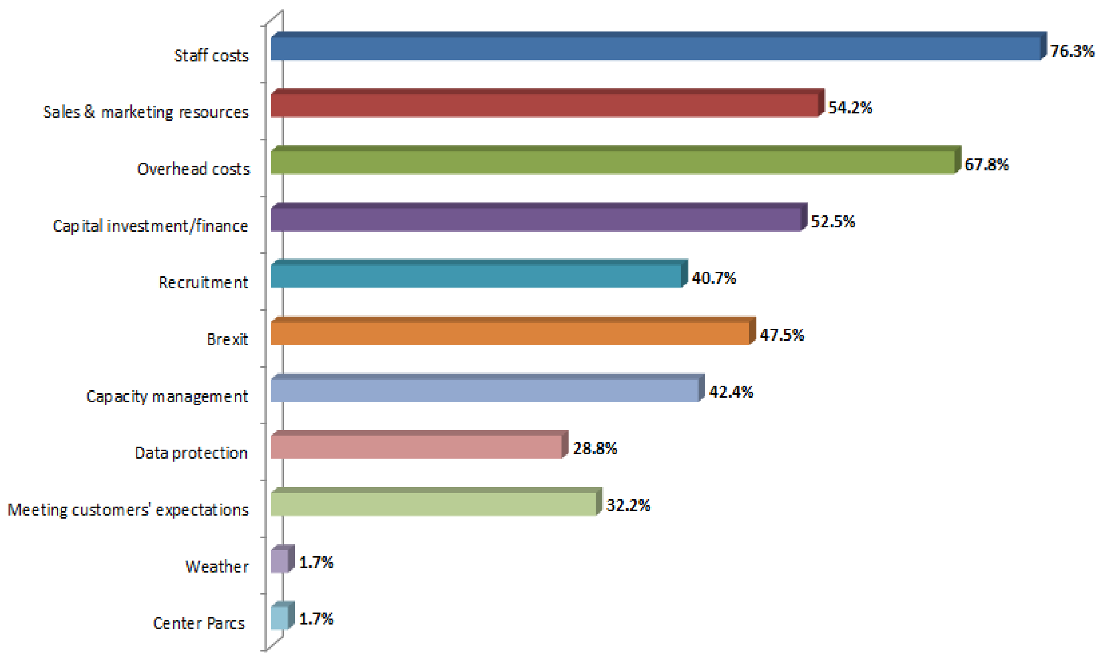
Almost all of the survey respondents were optimistic about business in 2019. The overall average expected growth in visitor numbers is 5.3%.

There are, of course, challenges to be addressed, and respondents identified a wide range of issues, as shown in Figure 6.1. The five most commonly mentioned challenges are:

- capital investment / finance
- staff costs
- overhead costs
- sales & marketing resources
- Brexit.

The top 4 are essentially about money, which indicates that there is considerable ongoing pressure on attraction operators to both contain costs and to generate increased revenues.

Figure 6.1: Challenges Ahead



7. APPENDICES

Appendix 1:

List of Members 2018-19

A1.

MEMBERS 2018-19

14 Henrietta Street	Little Museum of Dublin
Adare Heritage trust	Loftus Hall
Airfield Estate	Lough Gur Heritage Centre
Ardgillan Castle	Malahide Castle
Aviva Stadium	Medieval Mile Museum
Ballykeefe Distillery	National Botanic Gardens
Birr Castle Demesne	National Gallery of Ireland
Bru Na Boinne	National Leprechaun Museum
Bunratty Castle & Folk Park	National Library of Ireland
Castletown House	National Museum Country Life
Chester Beatty Library	National Museum National History
Christ Church Cathedral	National Museum of Decorative Arts
Cliffs of Moher	National Sea Life Centre
Cobh Heritage Centre	National Wax Museum
Dalkey Castle & Heritage	Newbridge Silverware
Donegal Castle	Newgrange/Bru na Boinne
Doolin Cave	Old Library & Book of Kells
Dublin Castle	Pearse Lyons Distillery
Dublinia	Phoenix Park Visitor Centre
Dun Aonghusa	Powerscourt Estate
Dunbrody Famine Ship	Powerscourt Distillery
Epic Emigration Museum	Rock of Cashel
Explorium	Rothe House Trust
Fethard Horse Country Experience	Round Tower Clondalkin
Foxford Woollen Mills	Russborough House
GAA Museum	Skerries Mills
Glasnevin Cemetery	Smithwicks Experience
GPO Witness History	Spike Island
Guinness Storehouse	St. Patrick's Cathedral
HMS Caroline	Swords Castle
Hook Heritage CLG	Tayto Park
House of Waterford Crystal	Teeling Whiskey Distillery
Imaginosity, Children's Museum	The Glass Factory
Irish National Heritage Pk	Thomond Park Stadium DAC
Irish National Stud and Garden	Titanic Belfast
Irish Rock & Roll Museum	Titanic Experience Cobh
Irish Whiskey Museum	Tullamore DEW Visitor Centre
Jameson Distillery	Ulster Folk Park
Jameson Experience	Ulster Museum
Kildare Village	Ulster Transport museum
Kilkenny Castle	Viking Splash Tours
Kilmainham Gaol	W5
King John's Castle	Westport House
Kylemore Abbey	Wicklow Gaol

Appendix 2:

Survey Questionnaire

A2. SURVEY QUESTIONNAIRE

CHL

ASSOCIATION OF VISITOR EXPERIENCES & ATTRACTIONS

ASSOCIATION OF VISITOR EXPERIENCES & ATTRACTIONS
Survey of Business Performance, 2018

Please return the completed survey form by e-mail to smcmahon@chl.ie by Monday March 4th 2019

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 2018, and on key issues that are affecting performance. The findings of the survey will allow members to benchmark their performance against industry standards. They will also enable AVEA to represent and promote the interests of its members more effectively and to influence external bodies including Tourism Ireland, Fáilte Ireland and ITIC. Your input is vital. The survey is strictly confidential. **CHL will not release completed questionnaires 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 directly to CHL Consulting by email by 5th March 2019. Please call Michael Counahan 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 2018

1) Name of Visitor Experience/Attraction:

2) Questionnaire completed by:

ABOUT YOUR ATTRACTION

3) Location (County/City):

4) What kind of organisation are you?
(pls insert 'X' in the appropriate boxes)

Private (for profit)
private (not for profit)
State / local authority
Other *(please specify)*

5) Do you have external contractors/concessionaires on-site?
(pls insert 'X' in the appropriate boxes) Yes No

If Yes, for what functions: *(pls insert 'X' in the appropriate boxes)*

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

KEY FINANCIAL DATA

6) Do you charge for admission? *(pls insert 'X' in the appropriate boxes)* Yes No

7) What was your total revenue in 2018, net of VAT? €

8) What % of your revenue came from the following sources?

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

9) Funding & Sponsorship: What % of your revenue, if any, came from the following sources?

Source	% share of turnover
operational grants	
sponsorship	
gifts / donations	
Total	

10a) Ticketing: What was the average ticket sale price per visitor in 2018 (net of VAT)? €

10 b) Have you increased your ticket prices for 2019? Yes No

10 c) *If Yes* - by what percentage %

10 d) Has the increase been caused by the VAT increase? Yes No

10 e) Has the increase in VAT resulted in a larger price increase than originally planned? Yes No

10 f) Has the increase in VAT wholly or partly absorbed a planned price increase? Yes No

11) Retail sales: what was the average retail spend per visitor in 2018 (net of VAT)? €

12) Café/restaurant: what was the average food & beverage spend per visitor in 2018 (net of VAT)? €

13) What was the breakdown of your operating expenditure in 2018 across the following categories?

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

14) Systems: *(pls insert 'X' in the appropriate boxes)*

a) Do you have an integrated ticketing/Electronic Point of Sale system? Yes No

b) Do you sell tickets online? Yes No

c) *If Yes,* what % of your ticket sales are purchased on-line?

YOUR VISITORS

15) How many visitors did you receive in 2018?

16) Please breakdown the total number of visitors 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**	0

17) What % of your admissions came from the following ticket categories in 2018?

Category	% share of visitors	
Individuals *(adults, children, families, concessions)*		
Groups		52.0%
- education (Schools or colleges)		
- group tours		
- day tours		
- cruise ships		
Memberships		
Events / festivals		
Other *(please specify)*		
Total	0.0%	

18) What was the seasonal distribution of your business in 2018?

Month	% share of visitors	Month	% share of visitors
January			
February			
March			
April			
May			
June			
		Total	0.0%

YOUR STAFF

19) How many staff do you employ?

Category	No.
Full-time	
Part-time	
Seasonal	
Total	0

20) What, if any, skill and/or educational deficits did you experience when recruiting staff in 2019?
(pls insert 'X' in the appropriate boxes)

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

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

FINAL OBSERVATIONS

21) What are the major challenges to your business in the year ahead?
(pls insert 'X' in all that apply)

Challenges	
Recruitment	
Staff costs	
Overhead costs	
Capacity management	
Data protection	
Sales & Marketing resources	
Meeting customers' expectations	
Capital investment / finance	
Brexit	
Other *(specify)*	

22) What are your expectations/targets for 2019?
Increase/decrease in visitor numbers (insert % (+/-)

23) Any additional comments?

THANK YOU FOR YOUR TIME AND COOPERATION

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