ASSOCIATION OF VISITOR EXPERIENCES & ATTRACTIONS

Survey of Members 2019 Performance Report

Representing the Irish Visitor Experience & Attractions Sector

SURVEY OF MEMBERSHIP BUSINESS IN 2019

- Report -

Prepared for

AVEA
ASSOCIATION OF VISITOR
EXPERIENCES & ATTRACTIONS

June, 2020

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CHAIRMAN'S FOREWORD

Never has the mantra 'information is power' been as relevant as at this critical juncture for the Visitor Experience and Attractions (VEA) sector, given the dire consequences of the impact of COVID-19. As the representative association for Visitor Experience and Attraction businesses in Ireland, AVEA commissioned CHL Consulting to undertake the Annual Survey of Membership Business again in 2020. Without this information, AVEA would not be able to continue to deliver the necessary supports required for you, our members: lobbying Government, stakeholders, and partners to ensure the sustainability of the key demand stimulator in the tourism industry is secured with real tangible measures. Some are already secured; others are still being demanded.

Gandhi said that "you must be the change you wish to see" and we all accept, deep down, that change is one of the few constants in life. All that is how 2020 will be remembered: a year of immense change. Change brings broad challenges, and, hard and all as this may seem right now, opportunities. Conducting the Annual Survey enables members to benchmark performance against peers within the sector, as well as continuing to fill a long-standing knowledge gap by providing relevant and up-to-date intelligence on the scale and scope of our member operations.

Now is a time for mobilisation and collaboration within AVEA to work to get through the current impasse – and succeed together. Collaborative working is central to our strategy to support you in delivering an ever more appealing and competitive experiential offering for both international and domestic tourists alike. AVEA will continue to work as one team on your behalf with Tourism Ireland, Fáilte Ireland, the Tourism Recovery Taskforce and international partners, amongst others, to deliver our focused strategy.

This is the third year of the Survey of Membership Business, and I am delighted to see an ever-growing response rate. I would like to thank all our members who continue to engage and provide responses to allow us continue to work on your behalf. As the Association continues to grow in the years ahead, 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 understand the nature of the VEA sector and the vital role it plays in both rural and urban communities across the length and breadth of Ireland. I have seen first-hand the impact of last year’s Survey in our dialogue with stakeholders unlocking supports in the recent months.

Whilst the core initiatives of AVEA, as outlined in detail at our 2019 annual conference, will continue apace, AVEA will not be found wanting in pivoting in these unprecedented times to ensure the activities pursued are relevant, focused and achievable. For example, in recent months the AVEA team have adjusted the quarterly Forum platform with huge success to a virtual E-Forum. Our corporate partners and Fáilte Ireland continue to provide valuable financial assistance and this is very much appreciated to facilitate a small but dedicated team working on your behalf. Moving forward, AVEA’s Responsible Tourism Framework will act as a guiding principle to recovery, and we continue in our objectives to facilitate networking, peer learning, promoting careers and education, and continually enhancing the profile of Ireland’s experiences and attractions. The good health of our VEA sector will remain integral to delivering the stories of our history, and of our rich cultural heritage.

It is clear there are rough waters ahead and, although we in the VEA sector are in the same storm, we are very much in different boats. To navigate collectively through this, future Surveys will be absolutely crucial to provide the information needed to ensure every boat comes out the other side, with the unwavering support and persistence of the board and team of AVEA.

Niall O’Callaghan

Niall O’Callaghan

Chairman, AVEA
June 2020

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, and has just completed its third full year in operation. There was a rapid take-up of membership in the first membership year commencing on 1st September, 2017, with some 75 visitor attractions joining that year. There are now 101 members in 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 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.

This is the third annual iteration of this survey. The conduct of the survey was disrupted by the emergence of the Covid-19 pandemic and the strict rules put in place by the Government to contain the spread of infection. These necessary measures included the closure of all visitor attractions. At the time of the shutdown, survey responses had been received from 54 members. In order to strengthen the coverage of the survey, data from an additional 23 members who had replied to last year's survey were updated on the basis of the quantitative data gathered from the 54 respondents to this year's survey, bringing the total number of sites covered by the analysis in this report to 77. Of the 77 sites:

- 33 are located in Dublin and 44 elsewhere
- 34 received less than 110,000 visitors in 2019, and 43 received more than 110,000.

This report contains the findings of the survey of business performance in 2019. Copies of the questionnaire and guide to completion are provided in Appendix 2.

1.2 Importance of AVEA and the Visitor Attraction Sector

Holiday visitors are motivated to travel to Ireland to explore and enjoy the country - its natural and built environment, people, heritage and culture. Visitor attractions and experiences play a vital role in stimulating awareness and interest among visitors, and in fulfilling their expectations by offering a wide choice of things to see and do.

The number of admissions to visitor attractions is testament to their importance. Based on data collected from AVEA's members, Fáilte Ireland, NISRA and other sources, it is estimated that, in 2018, almost 40 million visits were made to some 390 visitor attractions in the Republic of Ireland (excluding those receiving less than 500 visitors a year). In Northern Ireland, 11.3 million visits were made to 221 attractions in 2018.[1] 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 25.3 million visitors in 2019, 22.6 million in the Republic of Ireland, and 2.7 million in Northern Ireland; this represents, respectively, 57% of visits to all attractions in the Republic, and 24% of all visits to attractions in Northern Ireland.**
- **AVEA's members employ over 4,500 people.**
- **AVEA's members generated an estimated €501 million in revenues in 2019, a very high proportion of which flowed into their local economies in wages and purchasing of goods and services.**

1 *Excludes forests, country parks and marinas*

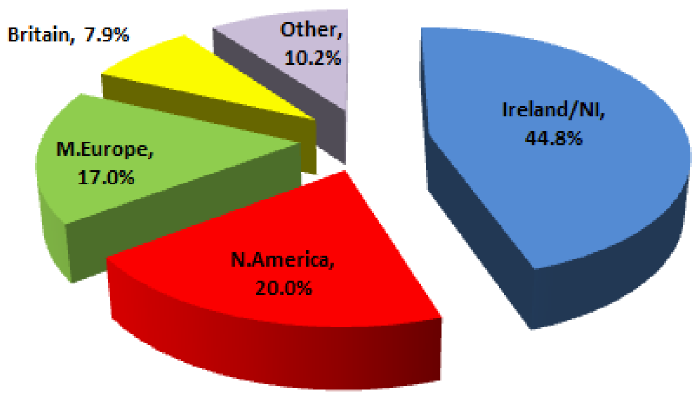
1.3 Executive Summary

This survey was conducted in Spring 2020, and gathered information on AVEA members' business performance in 2019. The analysis is based on data provided by 77 members, grossed up where appropriate to include all 101 members of the Association in operation in 2019.

Visitors

The survey respondents received 22.9 million visitors in 2019, an average of 297,403 per site. Overall, AVEA's members, including non-respondents, received an estimated 25.3 million visitors in 2019, 22.6 million in the Republic of Ireland, and 2.7 million in Northern Ireland; this represents, respectively, 57% of visits to all attractions in the Republic, and 24% of all visits to attractions in Northern Ireland.

Figure A: Origin of Visitors

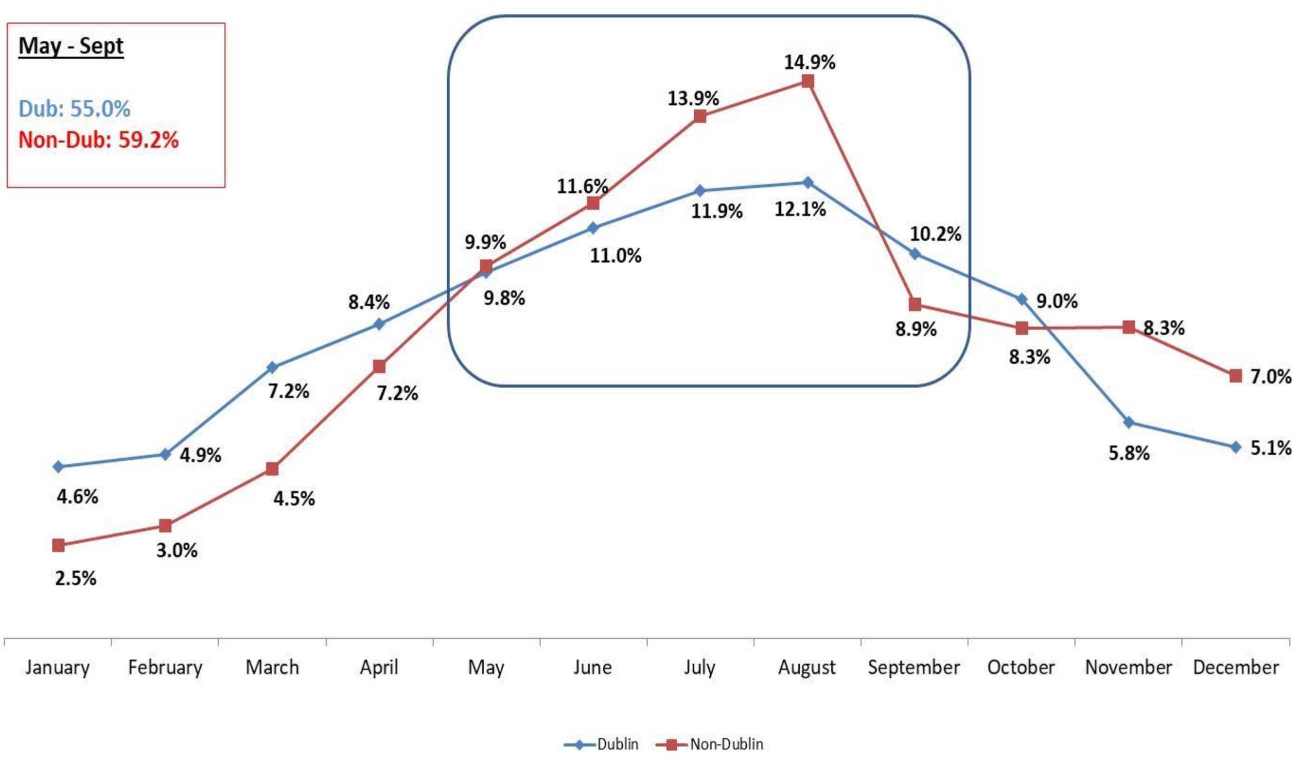


Note: 'Other' countries include Asia, Australia and the Middle East

The origin of visitors received by respondents in 2019 is detailed in Figure A. The domestic market, including Northern Ireland, is the largest single source of visitors. North America accounts for 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 tourists arriving from Britain.

Just over 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. Groups made up almost 26% of admissions, with group tours accounting for 11% of admissions and education groups almost 7%.

Figure B: Seasonal Distribution of Admissions

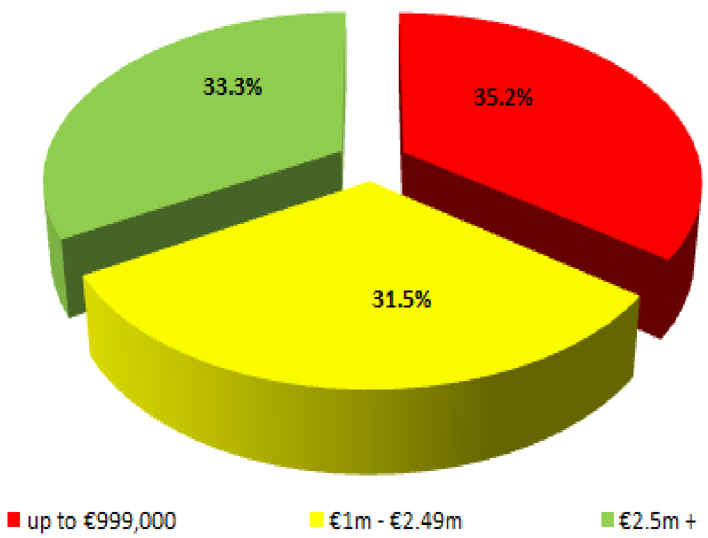


The seasonal pattern of admissions reflects the general seasonality of tourism in Ireland. As Figure B highlights, the seasonal peaking of demand during the summer months is much more pronounced at sites outside Dublin than at those in Dublin. This reflects the greater off-peak flows in city break demand.

Revenue

The distribution of respondents by level of revenue is detailed in Figure C. Based on data provided by survey respondents, it is estimated that AVEA's members in total generated €501 million in revenue in 2019. At almost half (45%) of all respondent sites, annual revenue amounts to less than €1 million. Another 25% earn between €1 million and €2.5 million, with almost a third (30%) earning over €2.5 million.

Figure C: Distribution of Respondents by Revenue



Ticket sales account for by far the largest share of revenue - 53% on average for sites in Dublin and also 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 below shows that there is, potentially, an average of between €19 and €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.

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	9.51	5.23	5.15
Dublin	10.60	5.30	4.92
Non-Dublin	8.74	5.17	5.25
Under 110,000 visitors	9.41	3.51	6.05
Over 110,000 visitors	9.52	6.73	4.35

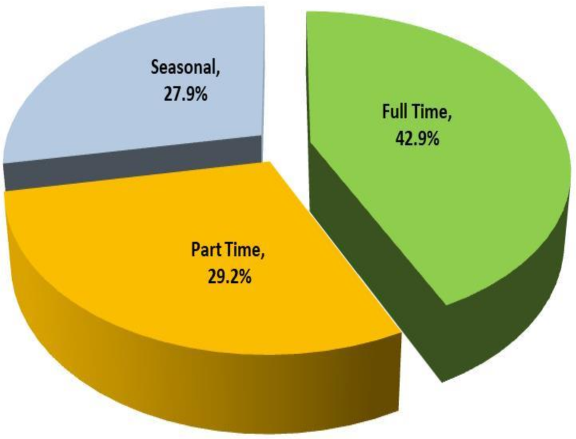
Operating Costs

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.

Staff

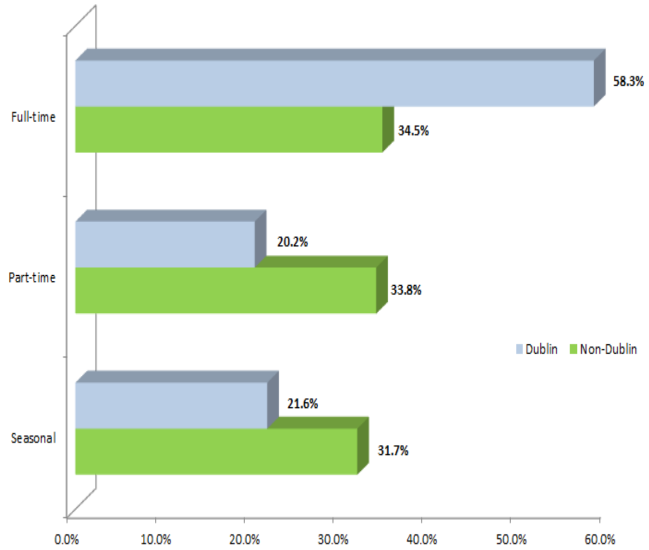
The survey respondents together employed a total of 4,045 staff in 2019, an average of 53 per site. Based on the survey responses, it is estimated that AVEA's members employ 4,524 staff in total. This figure highlights the importance of visitor attractions as employers. Overall, over 40% of these staff are employed on a full-time basis, with the balance divided between part-time (29%) and seasonal (28%) - see Figure D below.

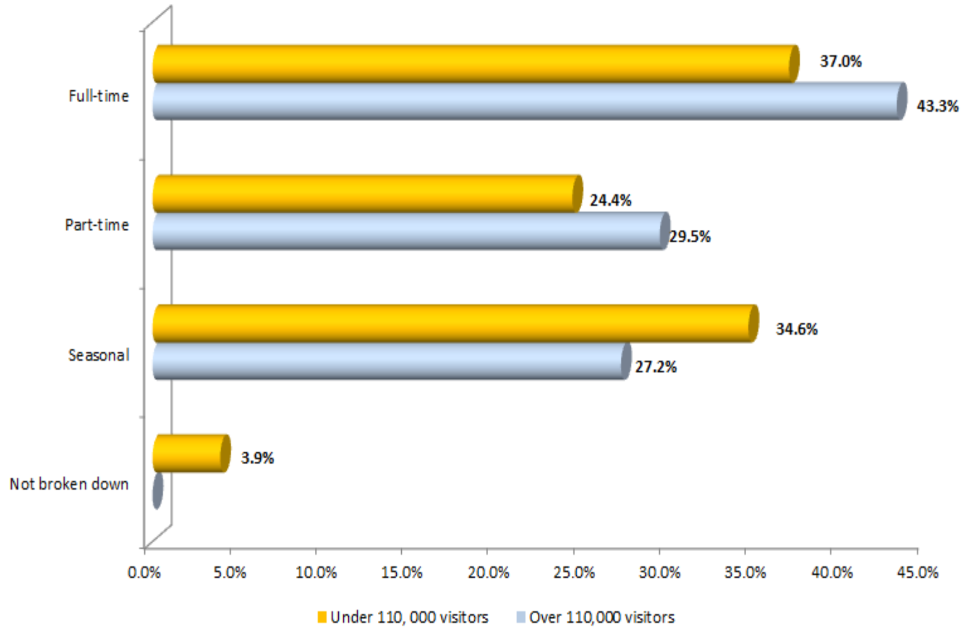
Figure D: Employment at Respondent Attractions



Total employed by Respondents: 4,045 (average of 53.2 per site)

Dublin vs. Non-Dublin





There is a significant difference between sites in Dublin and those outside Dublin in the structure of employment. 58% of staff at Dublin-based attractions are full-time, whereas just 35% 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 (34%) at sites outside Dublin are employed on a seasonal basis. The corresponding figure in Dublin is just 20%.

50% of 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: guides, kitchen staff, mid-management and sales & marketing.

74% of the 77 survey respondents employ external contractors and/or concessionaires on site. Such external providers are mostly used to provide cleaning and maintenance services, food and beverage outlets, and to run retail outlets.

Looking Ahead

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

In advance of the Covid-19 pandemic, survey respondents identified a wide range of issues that need to be addressed in the year ahead, as shown in Figure 6.1. The top four are essentially about money, which indicates that there is considerable ongoing pressure on attraction operators to both contain costs and to generate increased revenues. The five most commonly mentioned challenges are:

- staff costs
- overhead costs

- decreasing footfall
- visitor spend on site
- Brexit.

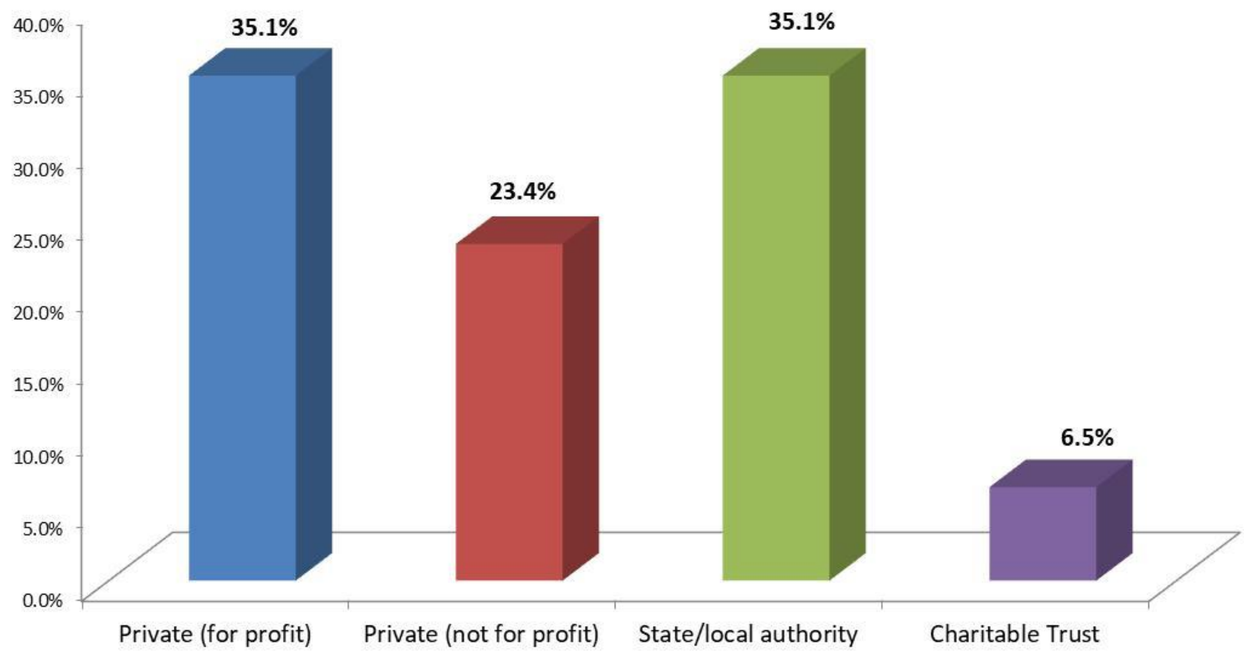
The impact of the Covid-19 pandemic and the lockdown measures introduced in the effort to contain its spread has undoubtedly intensified these challenges.

2. SURVEY RESPONDENTS

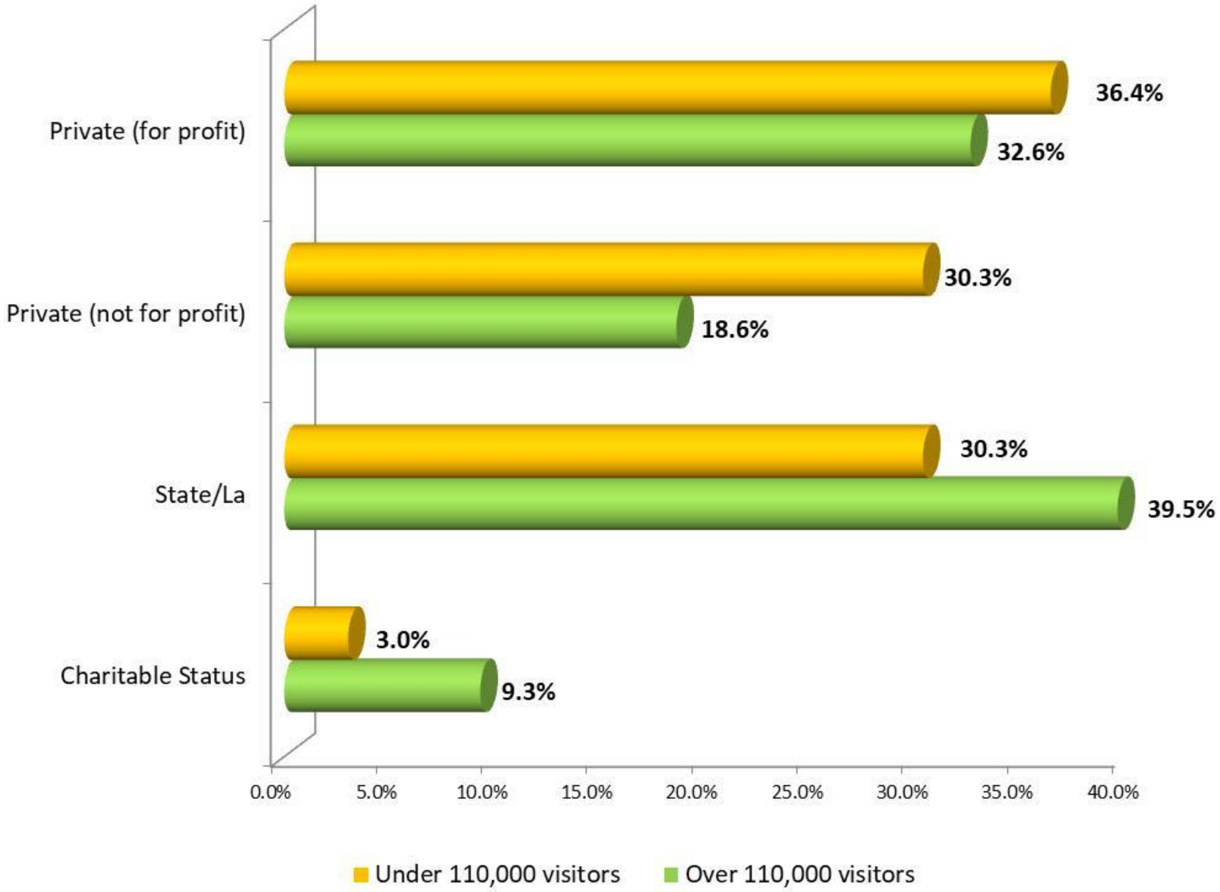
2.1 Type of Organisation

35% of respondents are private commercial operators, and a further 23% are private not-for-profit companies. The latter are typically companies limited by guarantee with many, if not most, having charitable status. 35% of the respondents are owned and operated by the State of Local Authorities. The remaining balance of 'other' respondents comprise sites of unique corporate form, including statutory bodies and charitable trusts.

Figure 2.1: Distribution of Respondents by Organisation Type



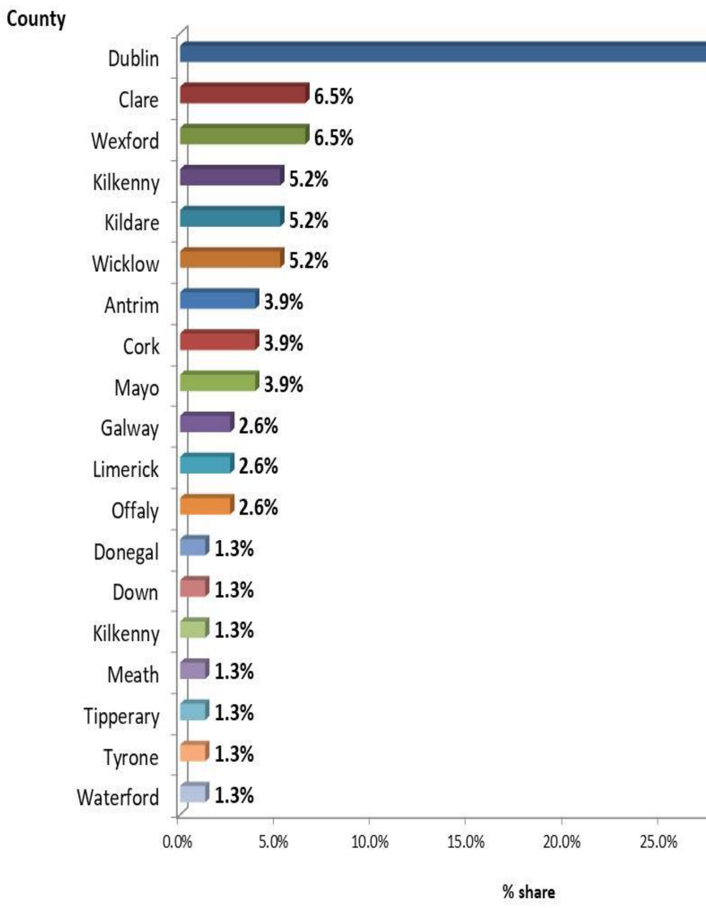
Breakdown by Number of Visitors

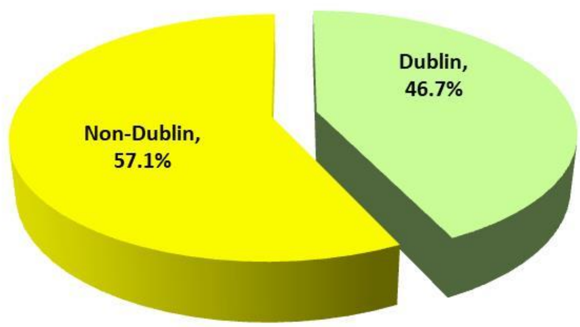


2.2 Location

33 of the 77 respondents (42.9%) are based in Dublin. Some 15 other counties in the Republic of Ireland and 3 in Northern Ireland are represented. This distribution is not representative of the overall distribution of sites in the sector – for example, only about 23% of the 390 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





3. VISITOR PROFILES

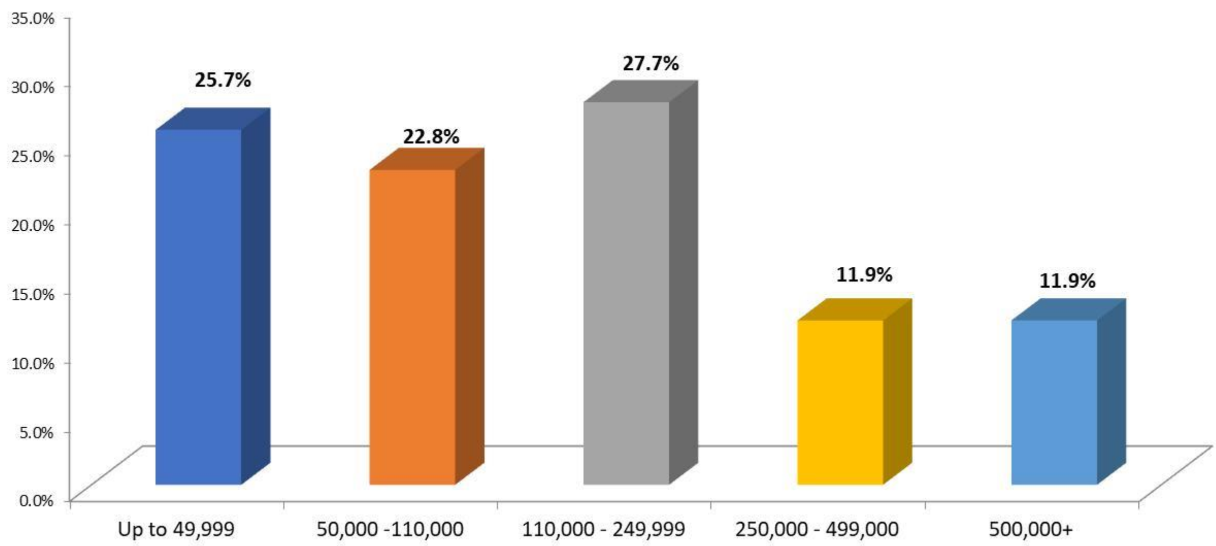
3.1 Number of Visitors Handled in 2019

The survey respondents received 22.9 million visitors in 2019, an average of 297,403 per site. Overall, AVEA's members, including non-respondents, received an estimated 25.3 million visitors in 2019, 22.6m in the Republic of Ireland, and 2.7m in Northern Ireland; this represents, respectively, 57% of visits to all attractions in the Republic, and 24% of all visits to attractions in Northern Ireland.

The distribution of AVEA's members by scale of visitation in 2019 is shown in the following table and chart below:

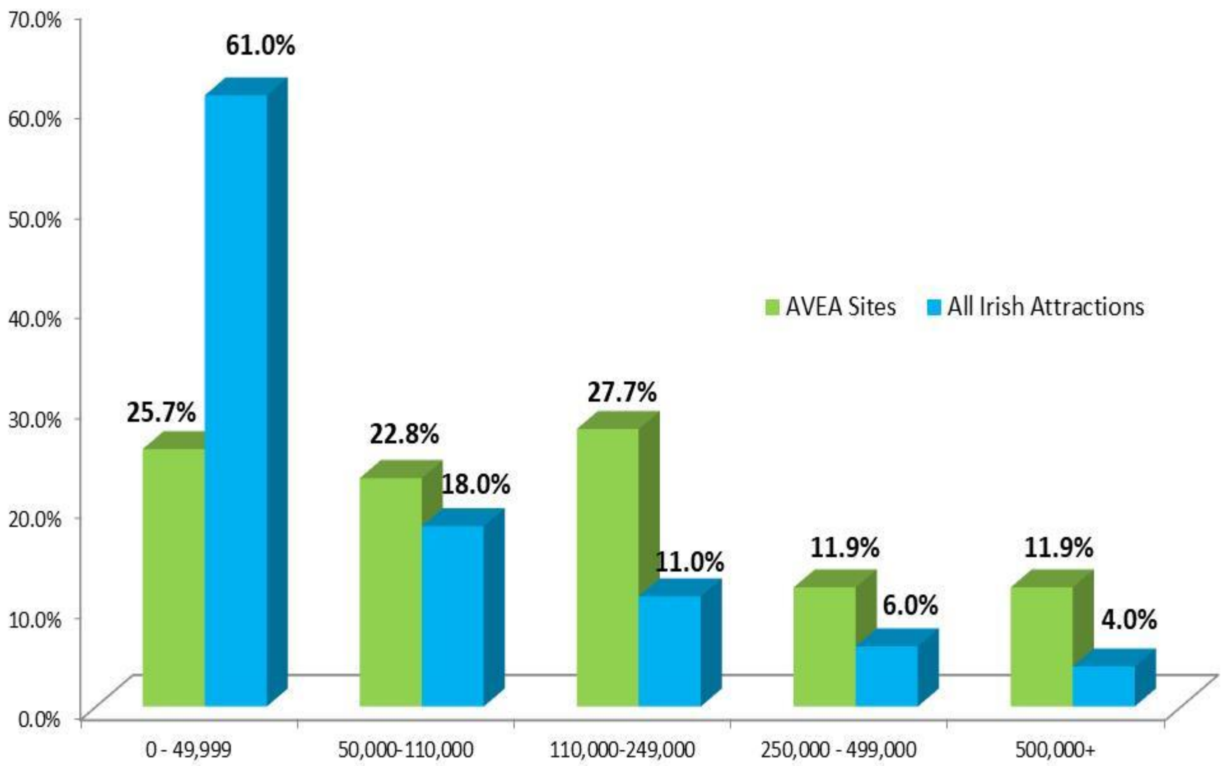
Visitors	No. of Sites	%
Up to 49,999	26	25.7%
50,000 -110,000	23	22.8%
110,000 - 249,999	28	27.7%
250,000 - 499,000	12	11.9%
500,000+	12	11.9%
Total	**101**	**100.0%**

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

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



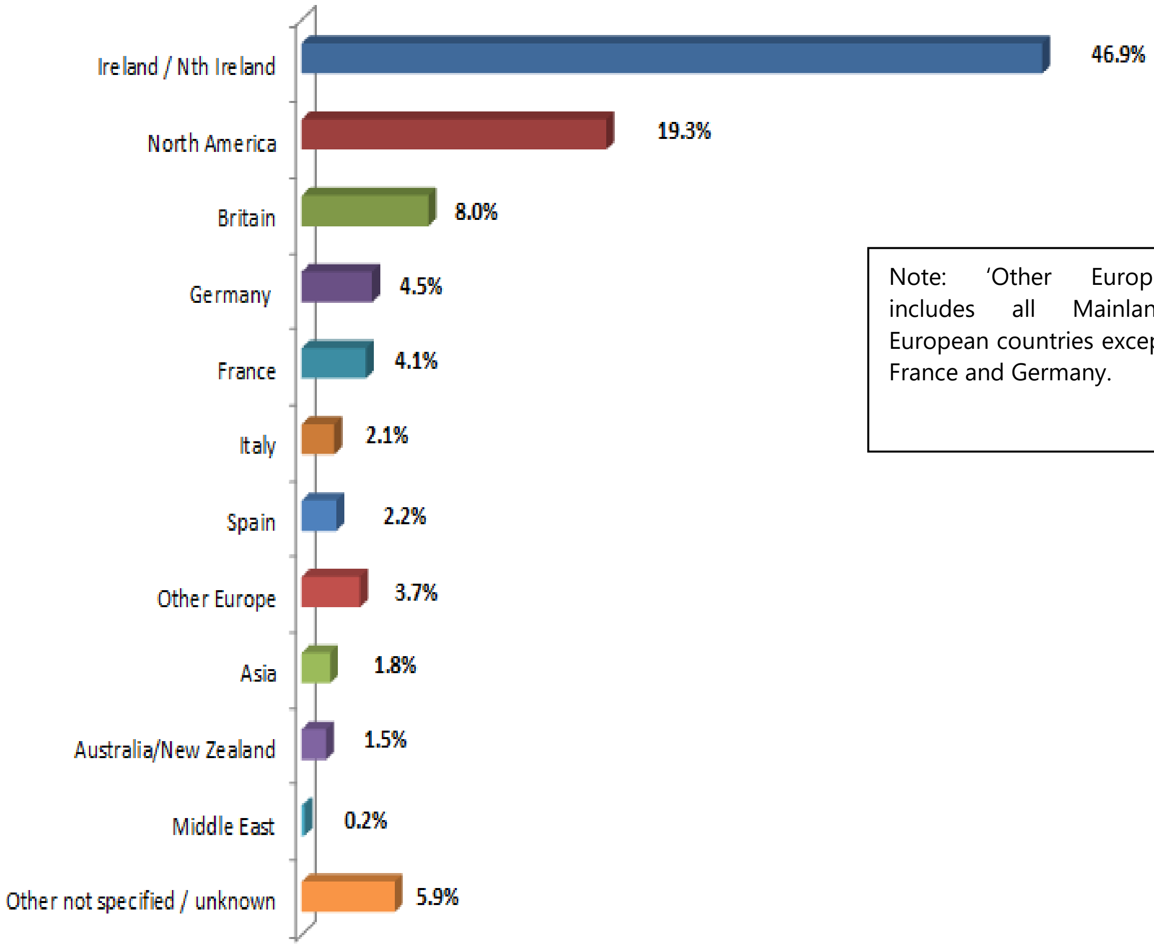
AVEA's representation of the Irish visitor attractions sector by size category is as follows:

Scale of Visitation	AVEA share of attractions in this category
500,000+	75%
250,000 - 499,999	52%
110,000 - 249,999	62%
50,000 - 109,999	32%
0 - 49,999	11%

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.

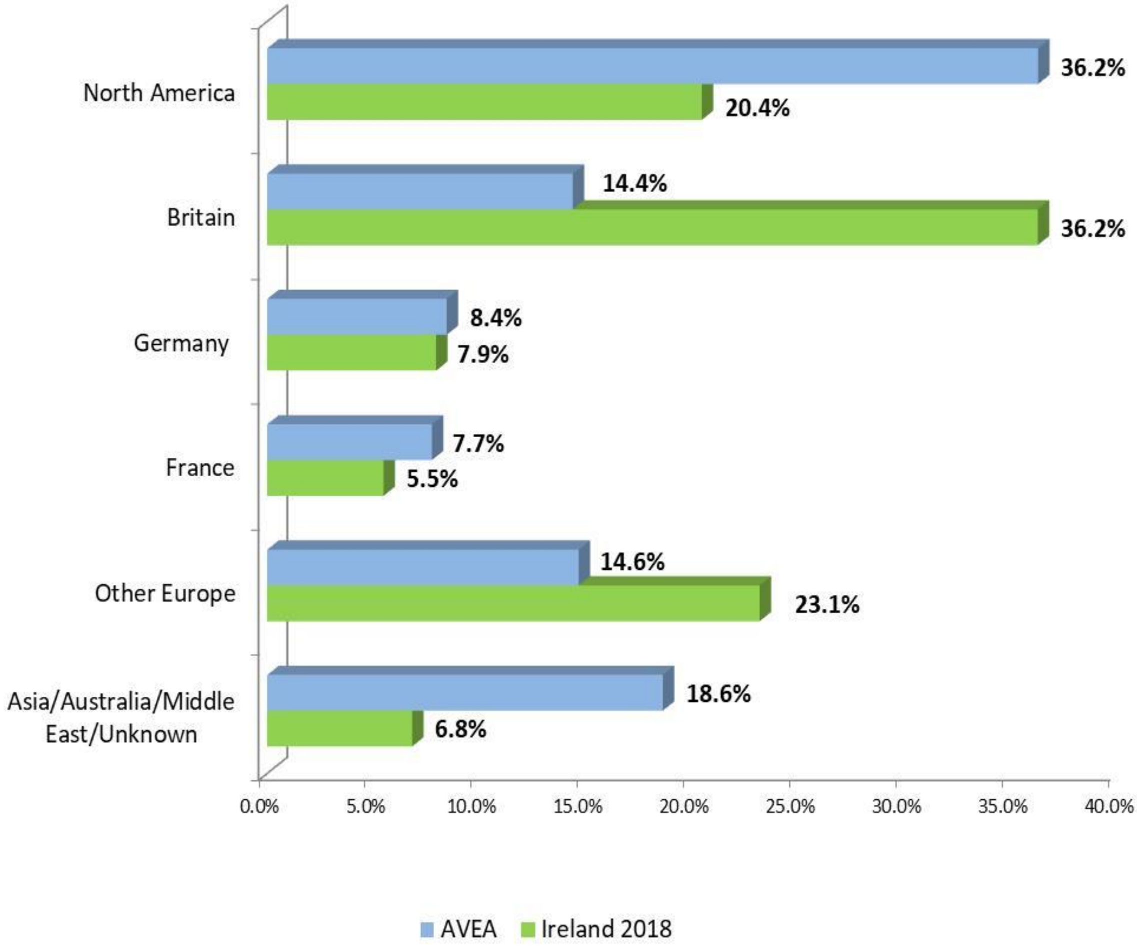
Figure 3.3: Origin of Visitors by Main Market



Note: 'Other Europe' includes all Mainland European countries except France and Germany.

The distribution of arrivals at AVEA sites by nationality is compared to that of all tourist arrivals in Ireland in Figure 3.4 (2018 data). 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.

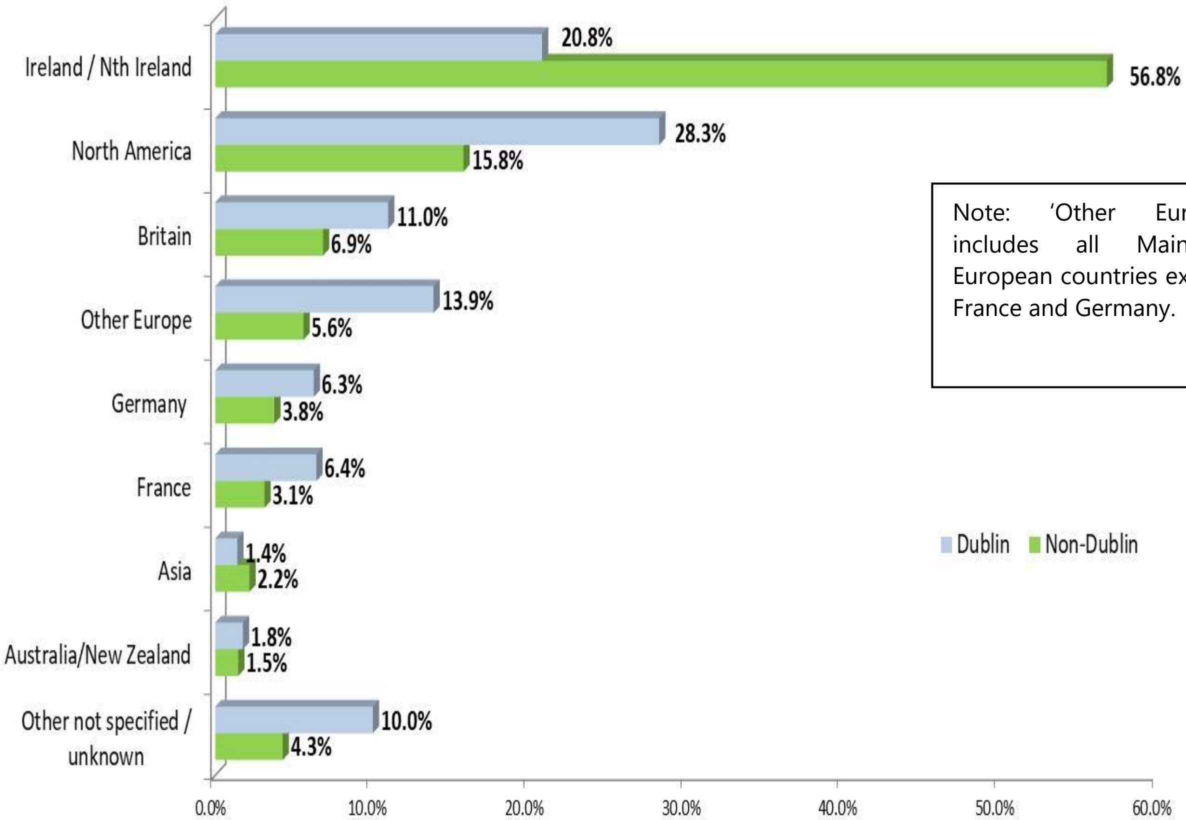
Figure 3.4: Origin of AVEA Visitors compared to all Tourist Arrivals



Note: excludes domestic visitors.

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.

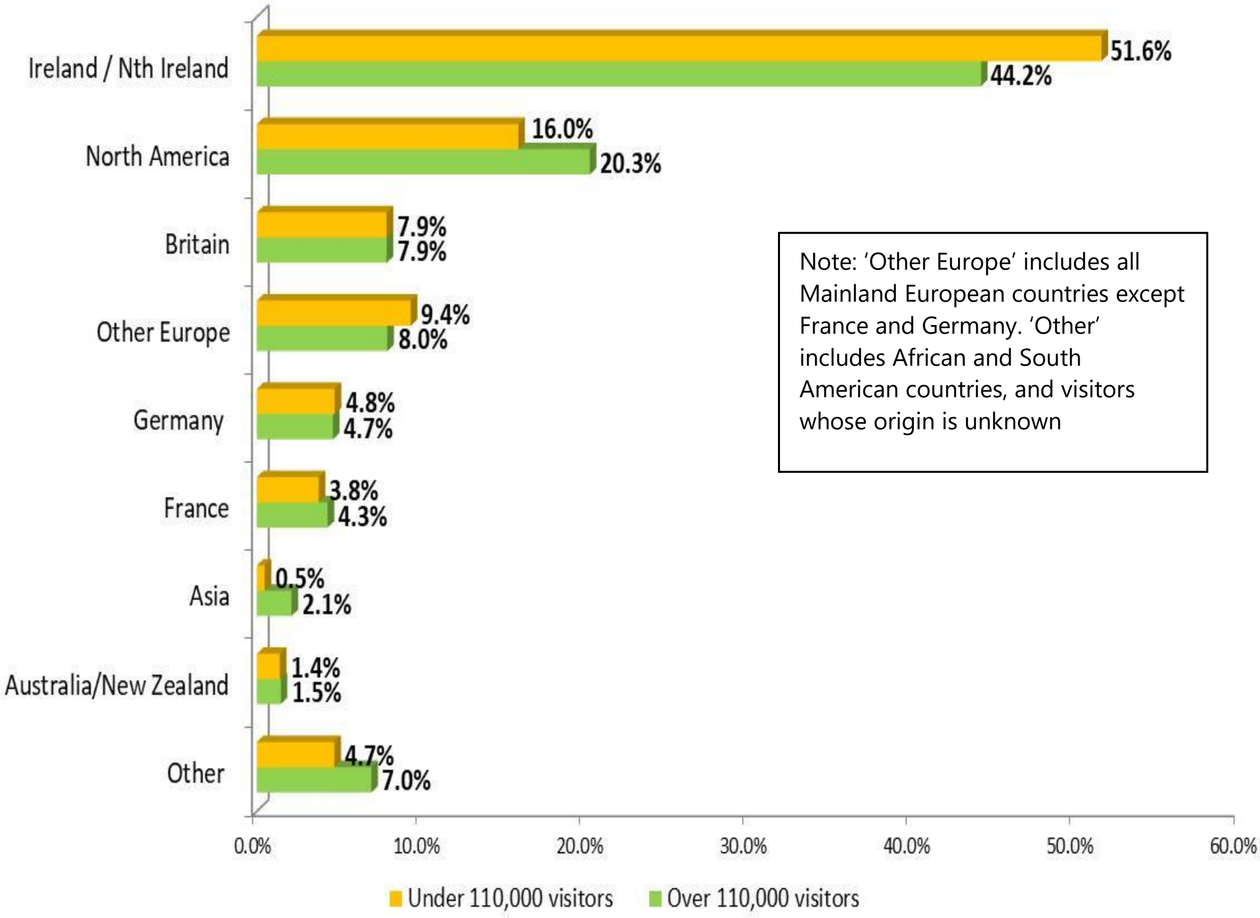
Figure 3.5: Differences in Visitor Origin - *Dublin vs Non-Dublin Sites*



Note: 'Other Europe' includes all Mainland European countries except France and Germany.

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.

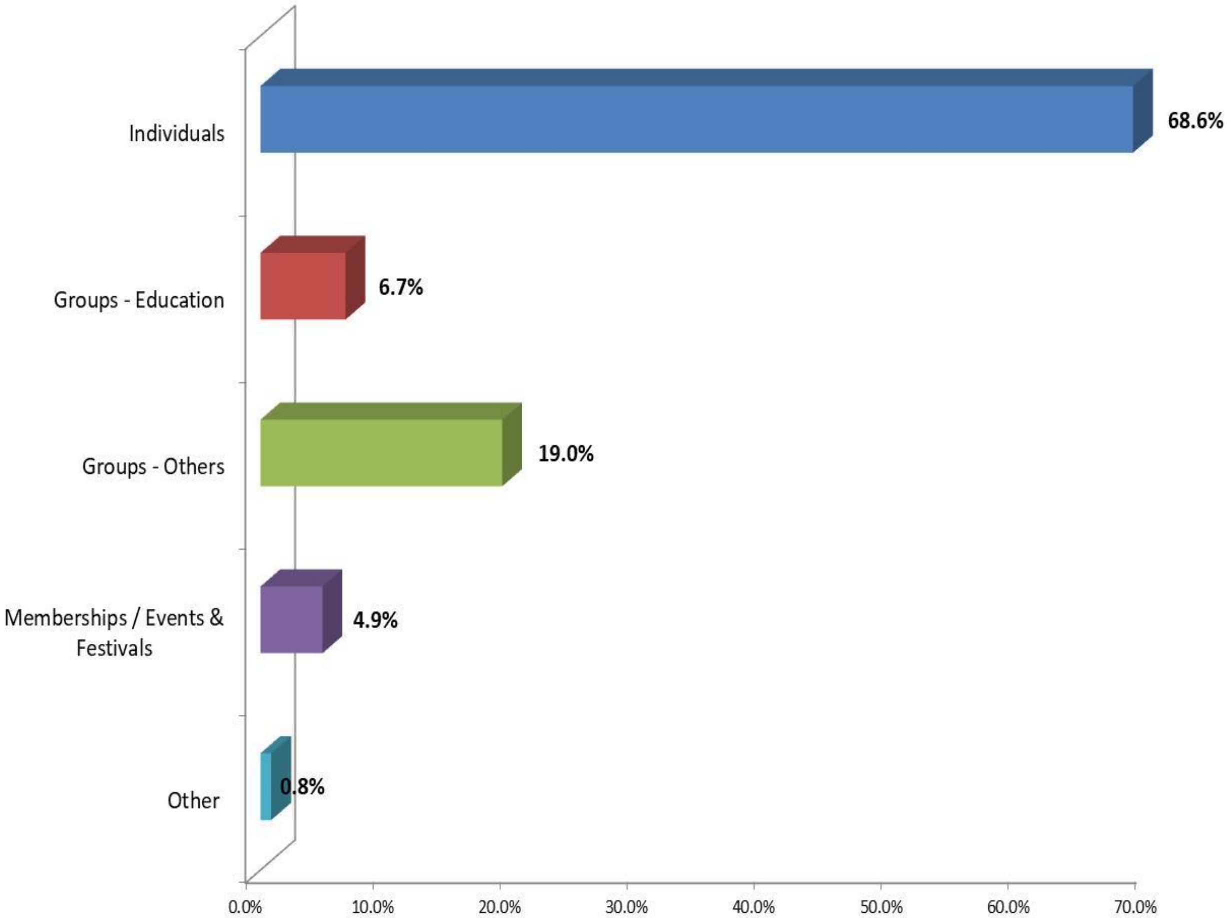
Figure 3.6: Differences in Visitor Origin by Scale of Visitation



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

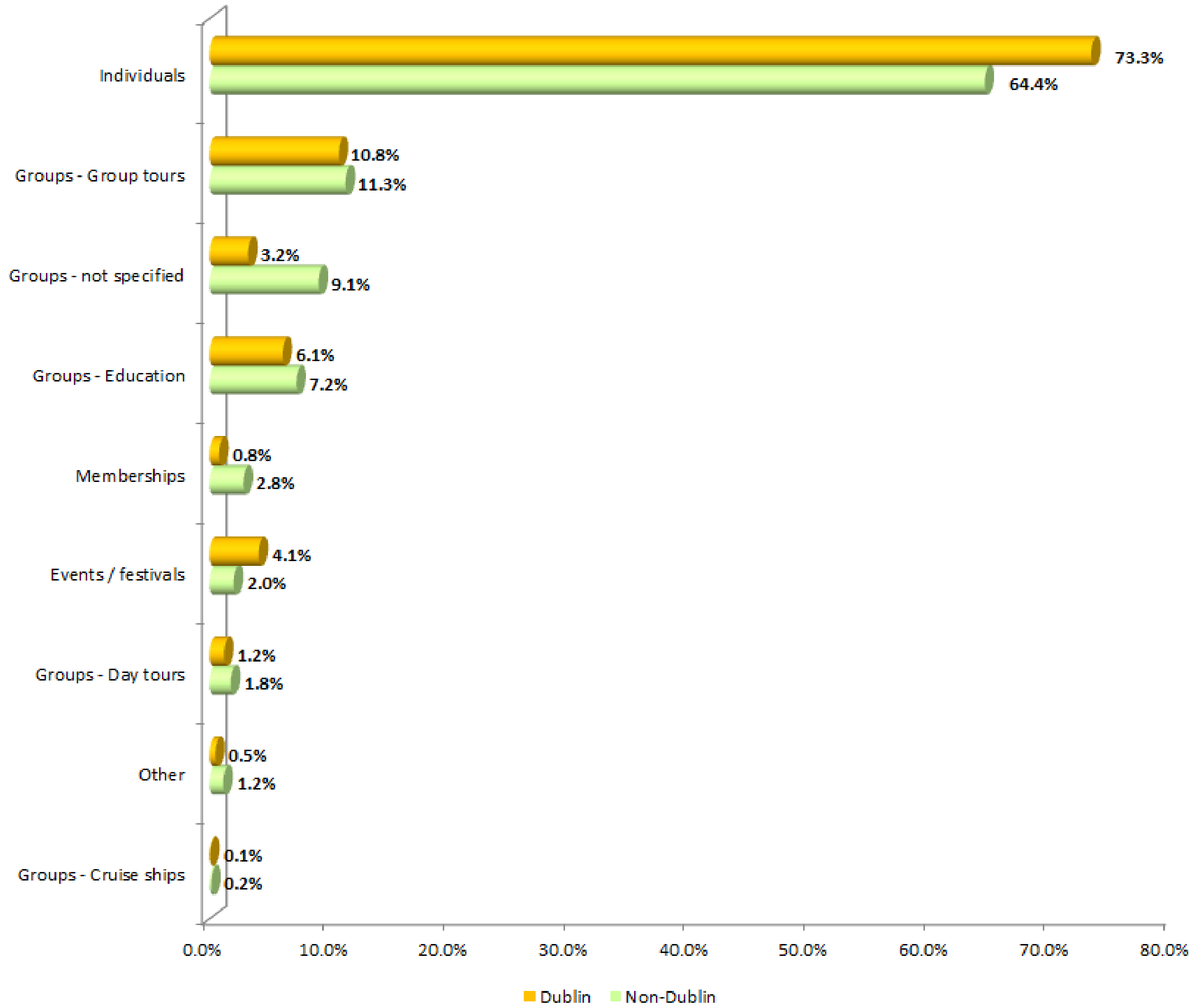
3.3 Visitor Ticket Categories

Figure 3.7: Distribution of Admissions by Ticket Category



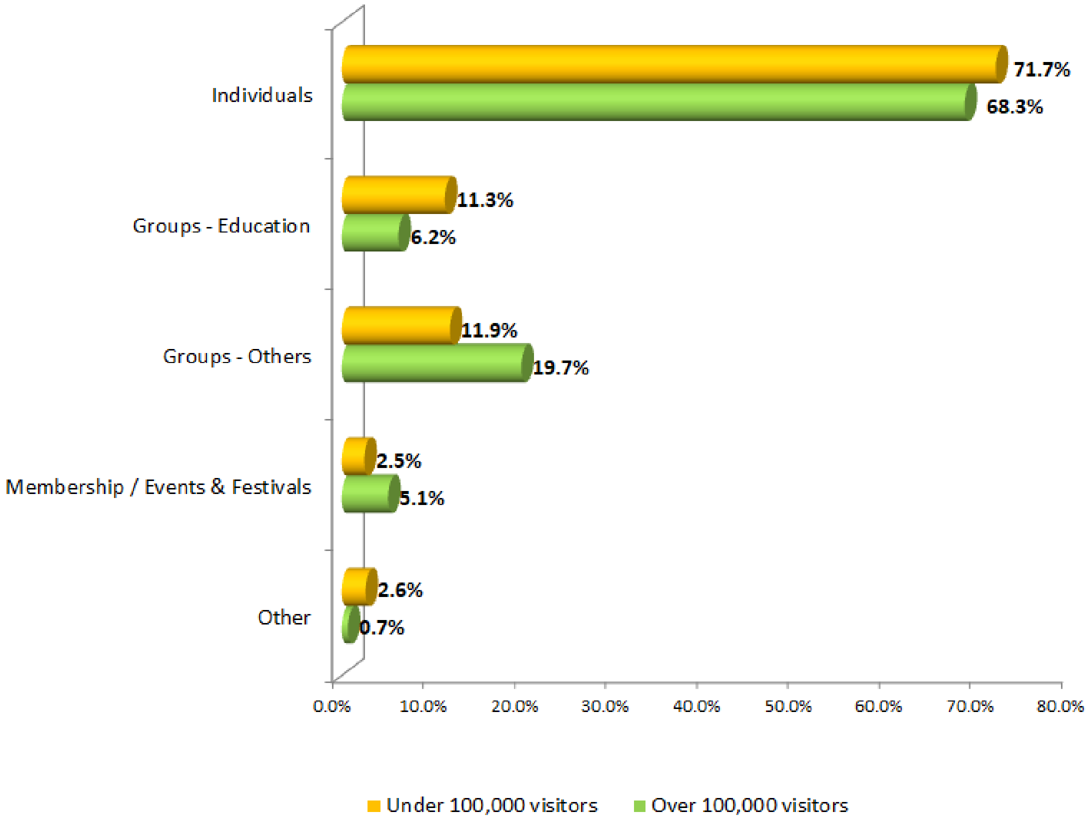
Almost two-thirds of all admissions to respondent attractions in 2019 purchased individual tickets. Not all were at full price - this category includes concessions (students, pensioners, etc.), families and children. Groups made up almost 26% of admissions, with group tours accounting for 11% of admissions and education groups almost 7%.

Figure 3.8: Distribution of Admissions by Ticket Category - *Dublin vs Non-Dublin*



Overall, in terms of admissions by ticket category to Dublin vs Non-Dublin sites, it is evident that almost three-quarters of all visitors to Dublin sites are individuals, compared with only 64% for sites outside Dublin. 'Other' includes afternoon teas, complimentaries, web/online, castle tours and not specified.

Figure 3.9: Distribution of Admissions by Size



3.4 Methods of Counting Visitors

Almost 90% of all sites count visitors on the basis of their ticket sales. Some 14% use camera/electronic sensors, 10% utilise entry turnstiles and 8% use manual counters/clickers. Most of those using alternatives to ticket sales do not charge for admission. The total adds to more than 100% as some sites use more than one method. A quarter of respondents do not count free admissions – all of these respondents normally charge for admission.

Figure 3.10: Methods of Counting Visitors

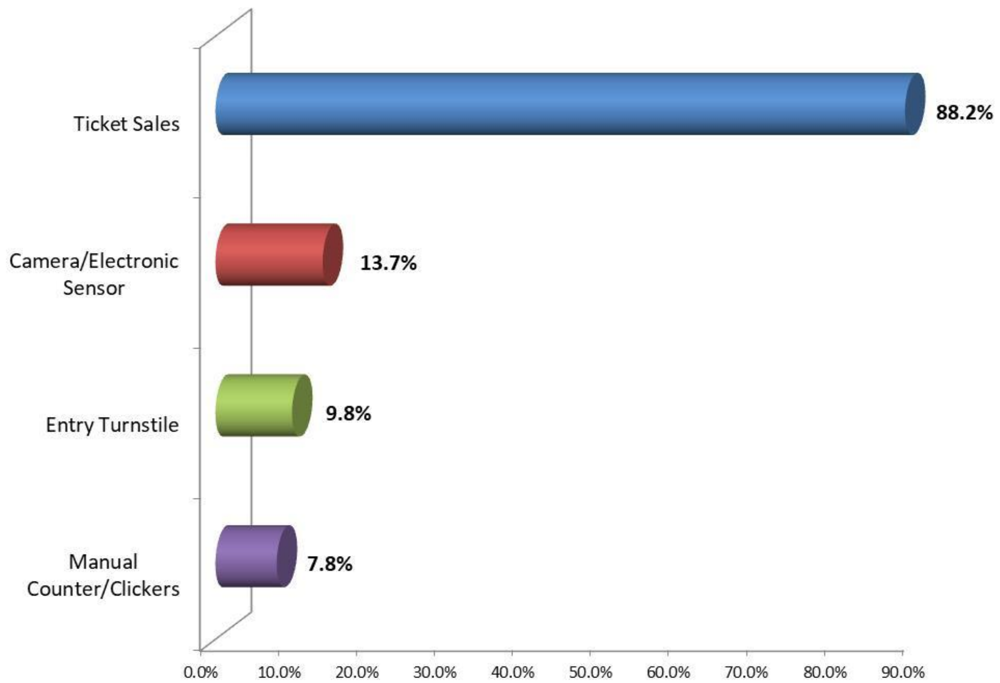
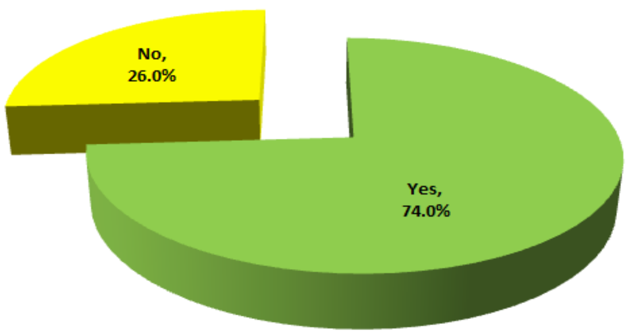
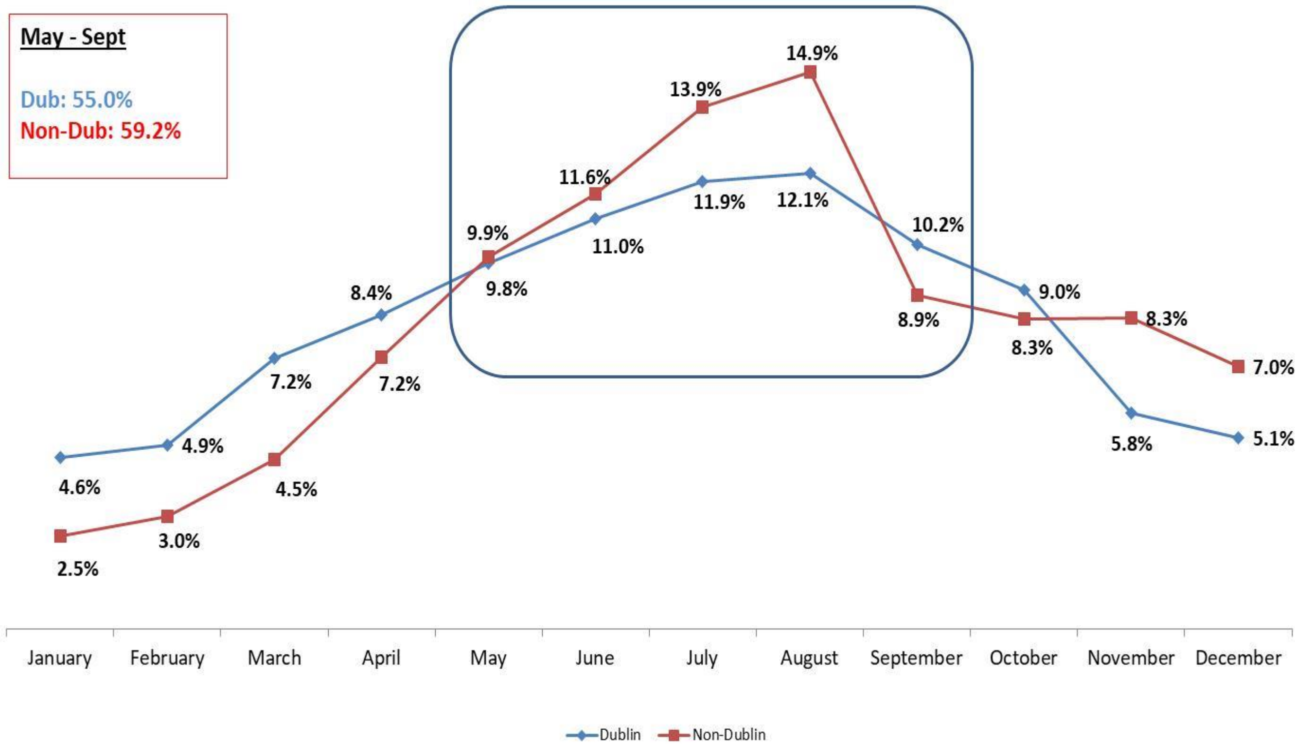


Figure 3.11: Do you count free admissions?



3.5 Seasonality

Figure 3.12: Seasonal Distribution of Admissions



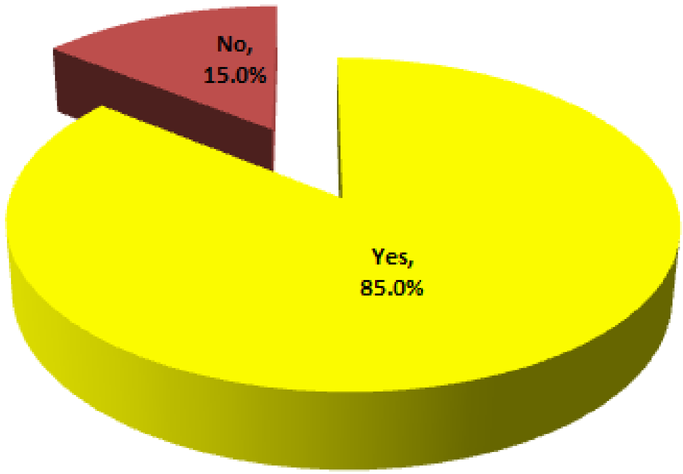
The seasonal pattern of admissions reflects the general seasonality of tourism in Ireland. As Figure 3.12 highlights, the seasonal peaking of demand during the summer months is much more pronounced at sites outside Dublin than at those in Dublin. This reflects the greater off-peak flows in city break demand.

4. FINANCIAL MATTERS

4.1 Revenue

66 (86%) of the 77 respondents charge for admission.

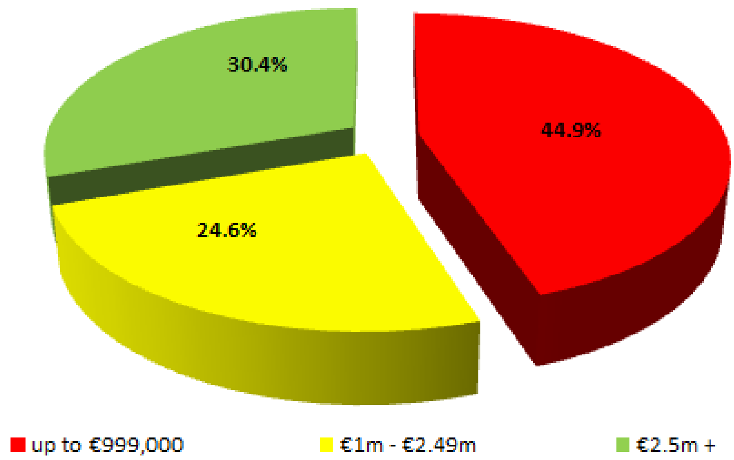
Figure 4.1: Proportion of Respondents who Charge Admission fees



The distribution of respondents by level of revenue is detailed in Figure 4.2. In total, the 69 respondents who provided information on this point generated €420.1 million in revenue in 2019. Grossing up on the basis of average visitor expenditure produces an estimated total revenue for all AVEA members of €501 million in 2019. At many sites (45%), annual revenue amounts to less than €1 million; another 25% earn between €1 million and €2.5 million, with almost a third (30%) earning over €2.5 million.

	Actual	%
Up to €999,000	31	44.9%
€1m - €2.49m	17	24.6%
€2.5m +	21	30.4%
Total	**69**	**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 - 53% for sites both in and 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, and having a snack or meal at the attractions 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 and concessions are significant sources of revenue outside Dublin than elsewhere, but their overall contribution is small.

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

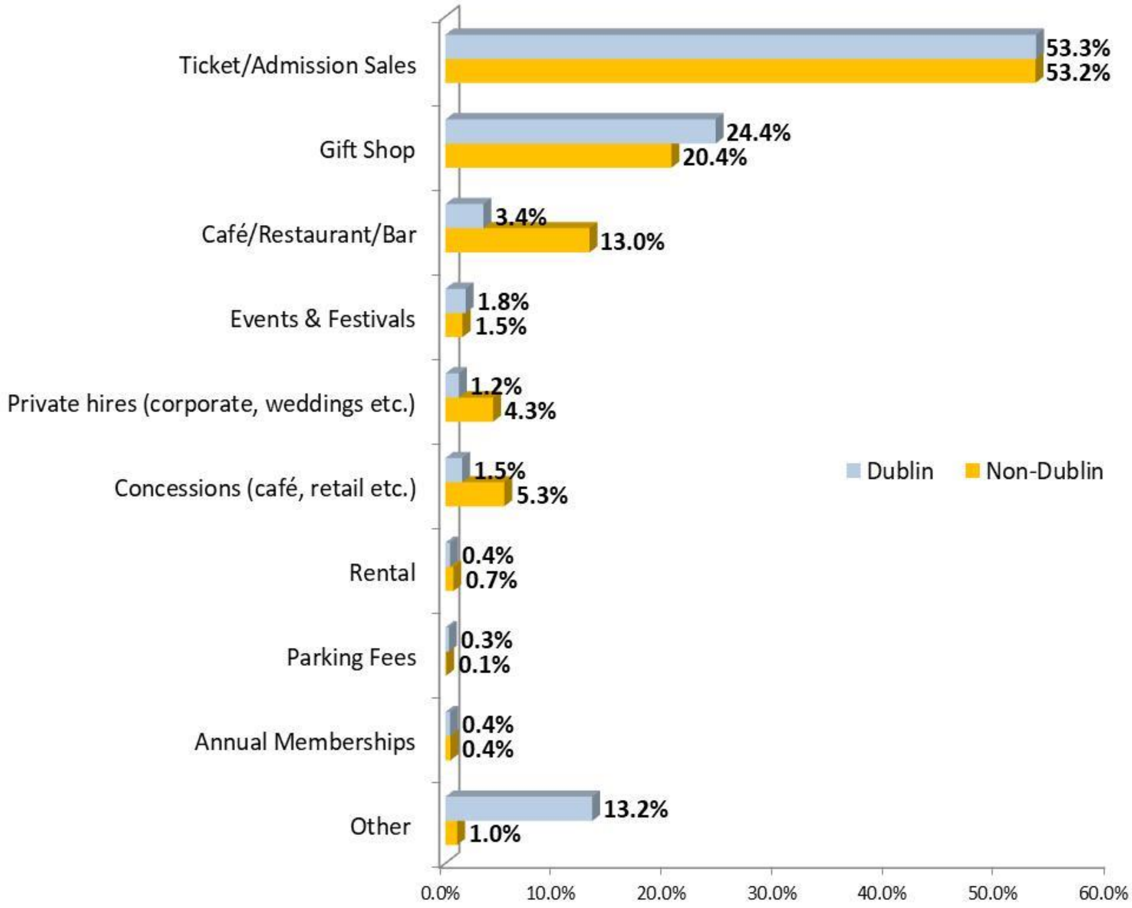
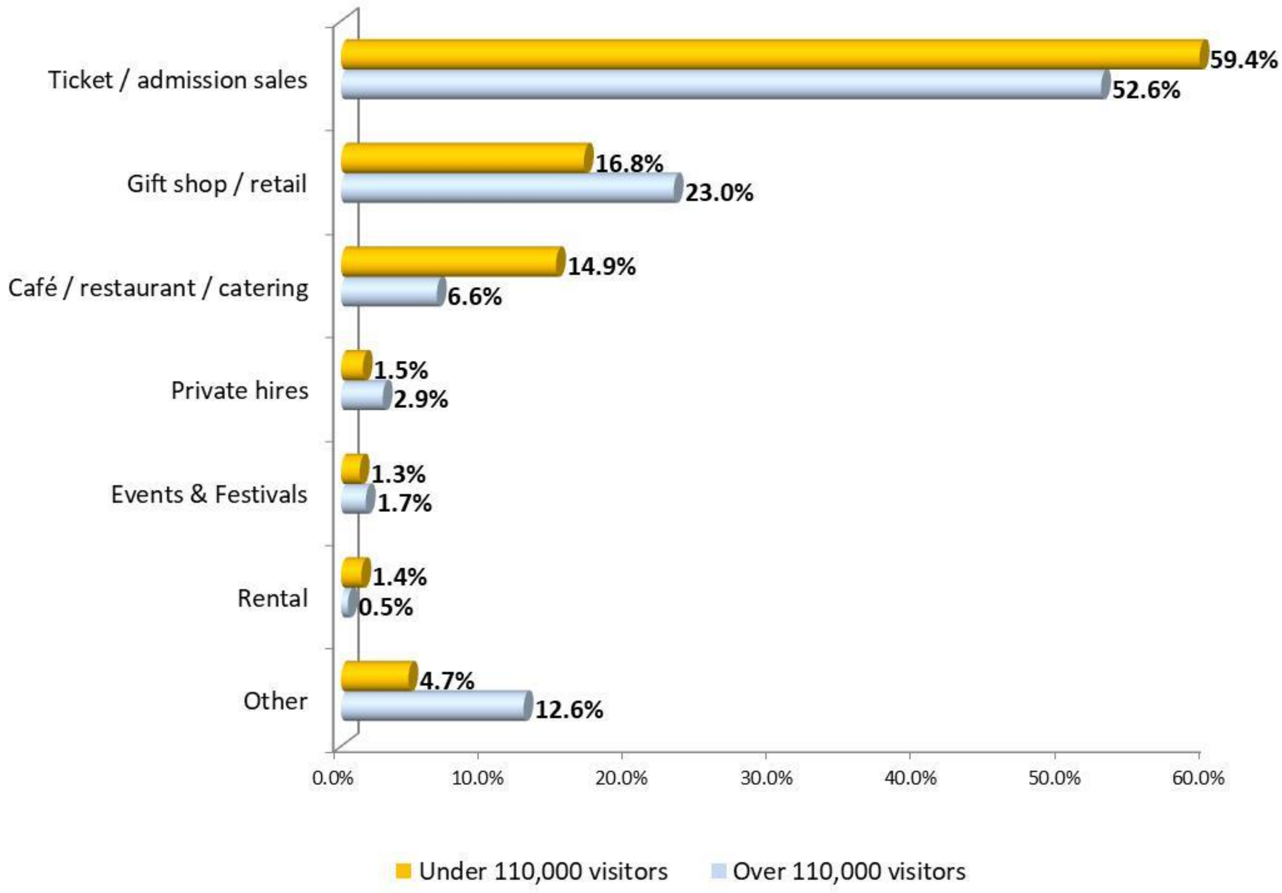


Figure 4.4: Breakdown of Revenue Sources by Number of Visitors



The 'Other' category comprises a very diverse range of income sources, including: concessions, parking fees, annual memberships, genealogy, commissions, tour guides, audio guides, caravan and camping accommodation, children's parties, bar, education, farm & garden produce, education, royalties, investment income, fundraising & sponsorship, tours and workshops, maintenance and not specified.

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	9.51	5.23	5.15
Dublin	10.60	5.30	4.92
Non-Dublin	8.74	5.17	5.25
Under 110,000 visitors	9.41	3.51	6.05
Over 110,000 visitors	9.52	6.73	4.35

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

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

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

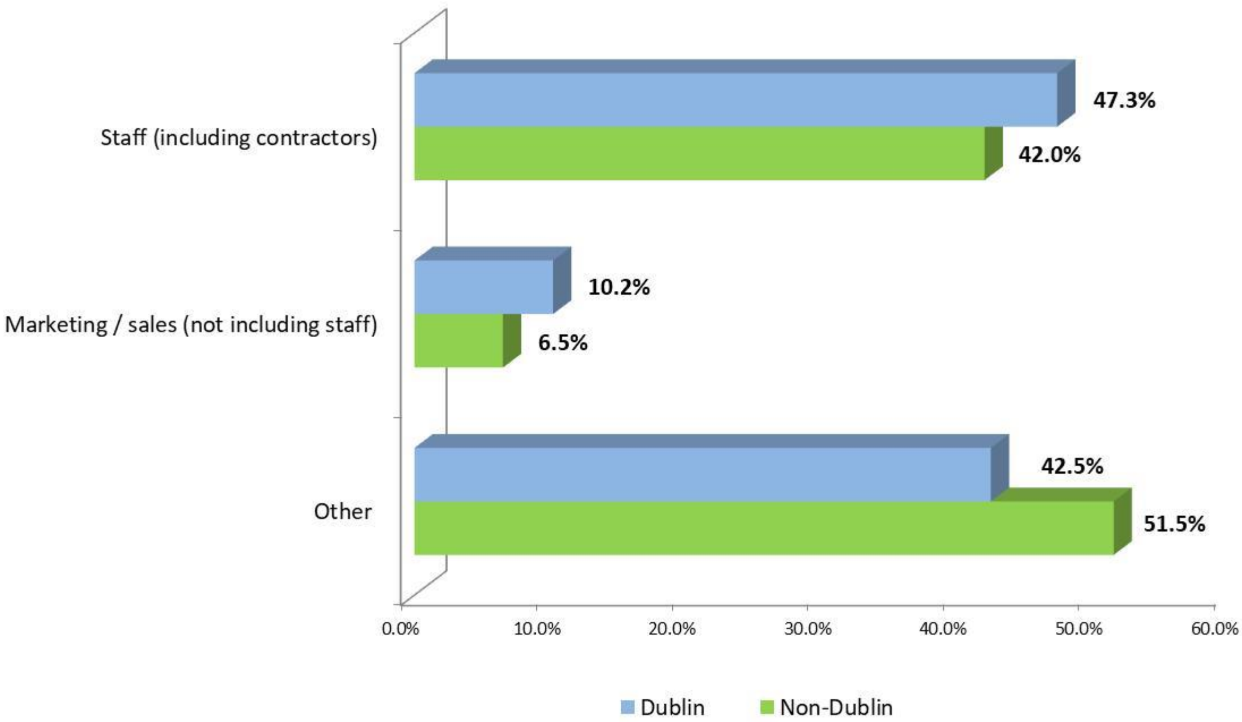
4.3 Operating Costs

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 (47%) of their total operating costs, as compared with 42% for sites outside Dublin. Dublin sites allocate a greater share of their operating budgets to marketing and sales (excluding staff) - 10% as opposed to 7% for sites outside Dublin.

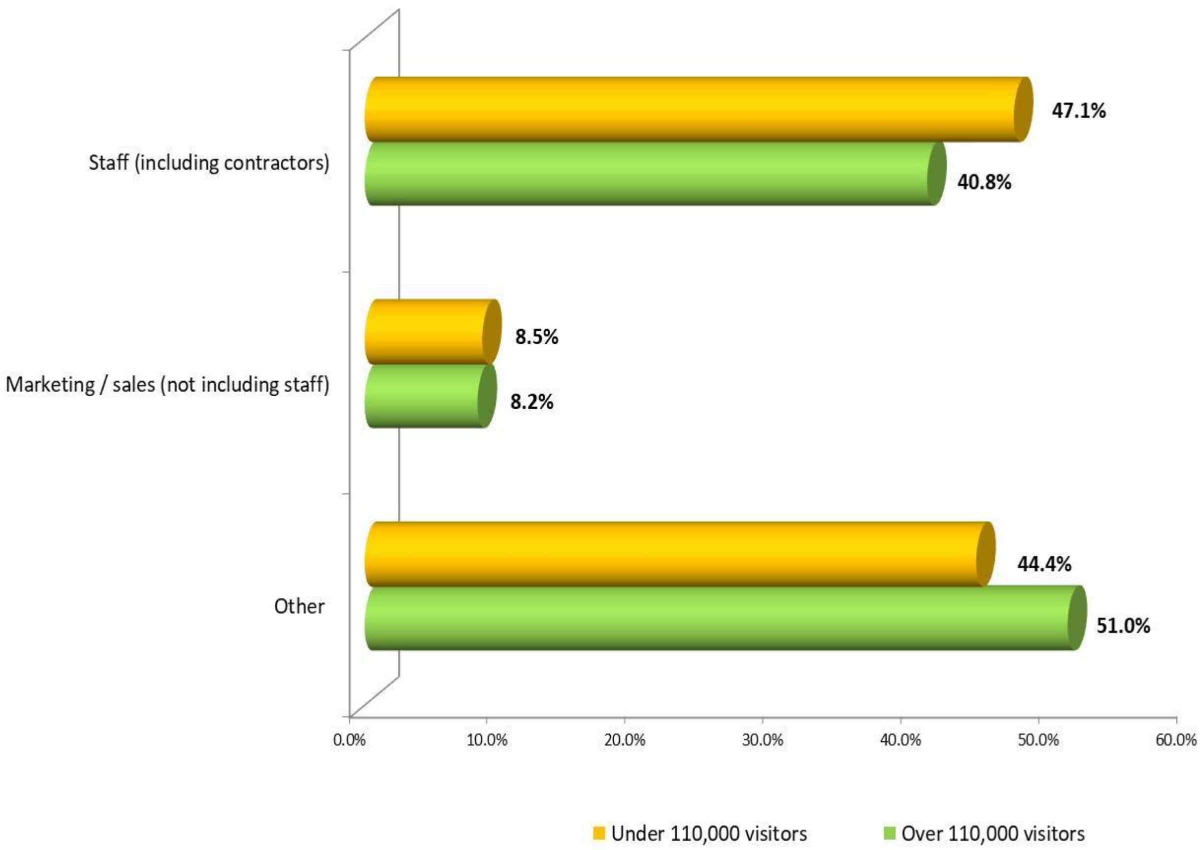
Figure 4.5: Distribution of Operating Costs

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. The allocation of share of operating budget to marketing is comparable for both sites in Dublin and outside - at 8%.

Figure 4.6: Distribution of Operating Costs by Scale of Activity



4.4 Pricing and Bookings

Some 57% of respondents increased their prices for 2020.

Figure 4.7: Have you increased your ticket prices for 2020?

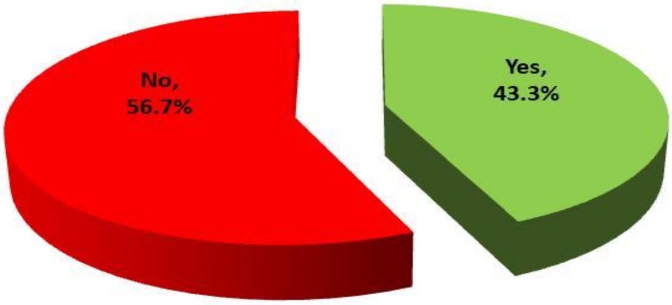
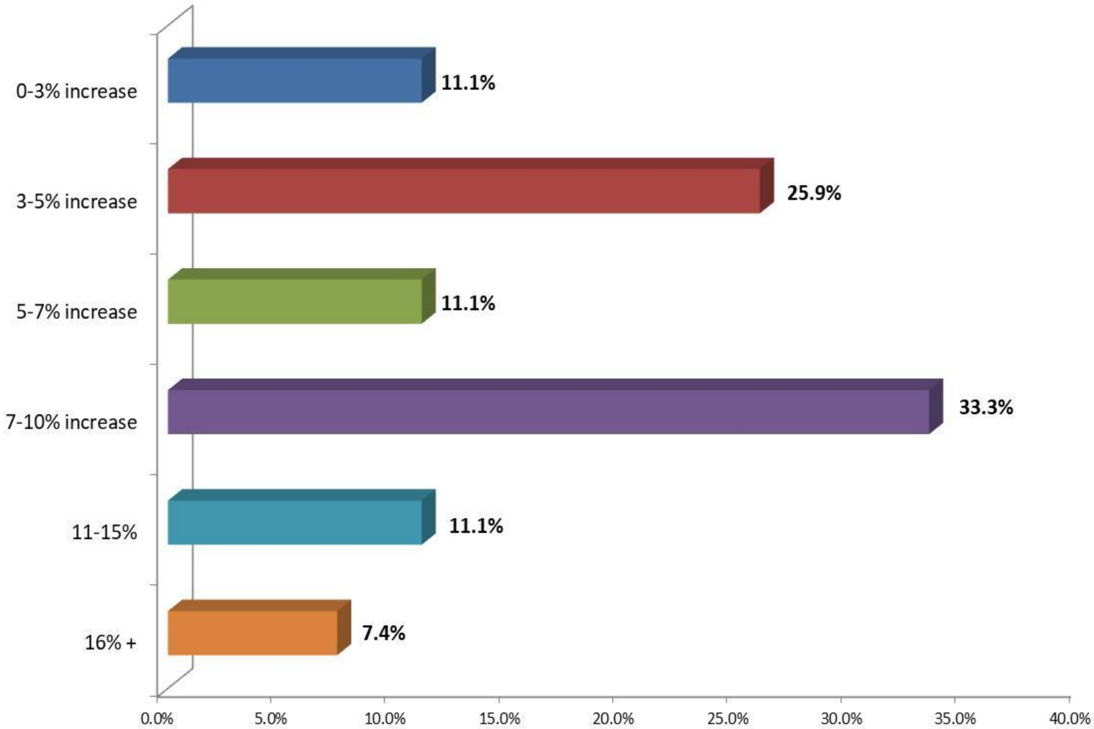


Figure 4.8: If Yes, by what percentage?

The overall average increase for those who have increased their prices for 2020 was 7.7%

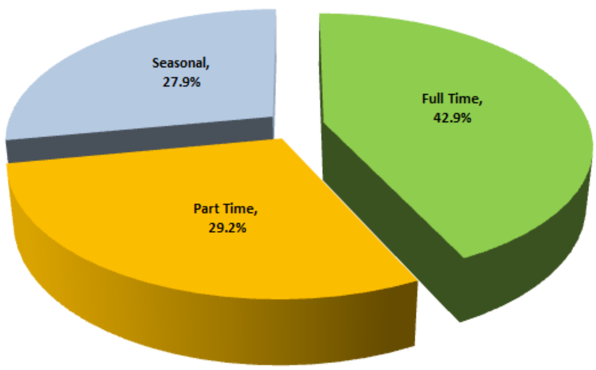


5. STAFF

5.1 Staff Employed

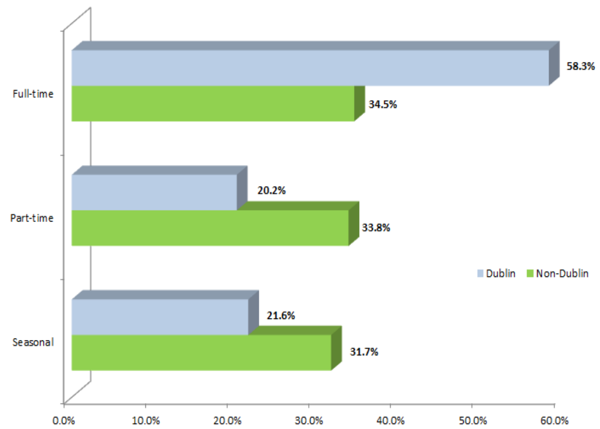
The survey respondents together employed a total of 4,045 staff in 2019, an average of 53.2 per site. Based on the average staff:visitor ratio, it is estimated that the 101 AVEA members employ 4,524 staff. This figure highlights the importance of visitor attractions as employers. Overall, over 40% of these staff are employed on a full-time basis, with the balance divided between part-time (29%) and seasonal (28%).

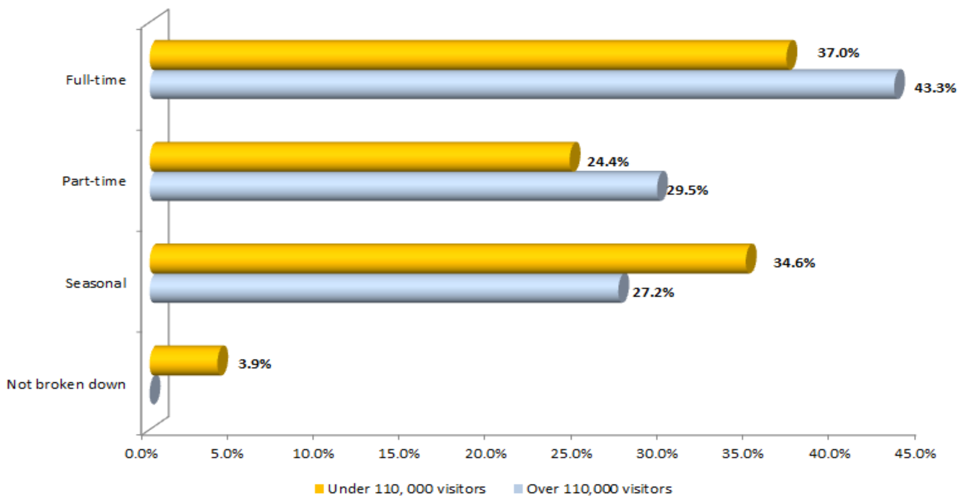
Figure 5.1: Employment at Respondent Attractions



Total employed by Respondents: 4,045 (average of 53.2 per site)

Dublin vs. Non-Dublin





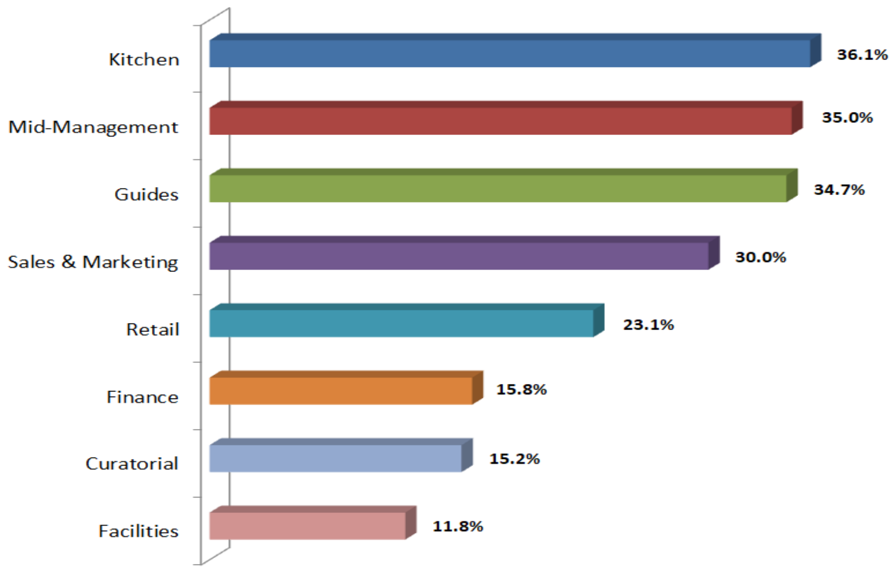
There is a significant difference between sites in Dublin and those outside Dublin in the structure of employment. 58% of staff at Dublin-based attractions are full-time, whereas just 35% of staff at sites outside Dublin are full-time. Reflecting the greater degree of seasonality in demand outside Dublin, a much higher proportion of staff (34%) at sites outside Dublin are employed on a seasonal basis. The corresponding figure in Dublin is just 20%.

There is a difference in the employment structure at sites receiving more than 110,000 visitors compared to those receiving fewer than 110,000. Almost a third staff employed at larger sites are employed on a part-time basis, compared to only a quarter at smaller sites, and a higher proportion (43%) of staff at larger sites are employed on a full-time basis compared to just 37% at sites receiving less than 110,000 visitors. The inverse applies with respect to seasonal staff.

5.2 Staff Recruitment Issues

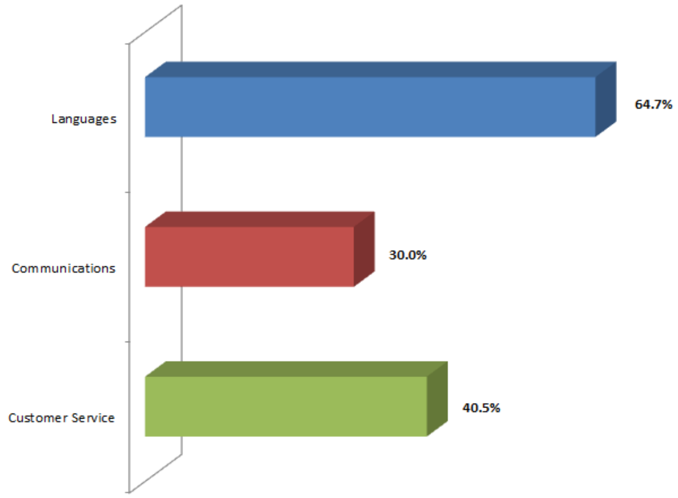
50% of survey respondents noted that they had encountered difficulties recruiting staff in certain categories. These categories are listed in Figure 5.2. The disciplines in which it proved most difficult to recruit suitable staff were kitchen staff, mid-management, guides and sales & marketing.

Figure 5.2: Staff Categories in which Respondents Experienced Recruitment Difficulties (% of respondents)



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

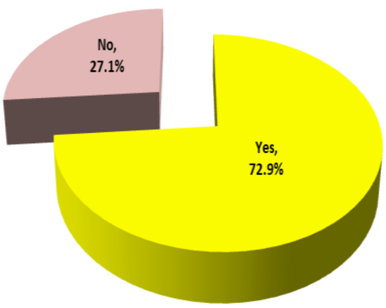


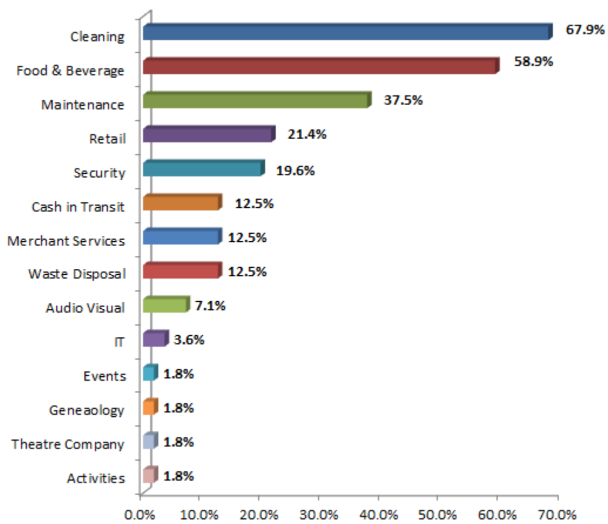
5.3 Use of External Contractors / Concessionaires

74% of the 77 survey respondents employ external contractors and/or concessionaires on site. As Figure 5.4 shows, such external providers are mostly used to provide cleaning and maintenance services, food and beverage outlets, and to run retail outlets.

Figure 5.4: Use of External Contractors / Concessionaires

For what functions...

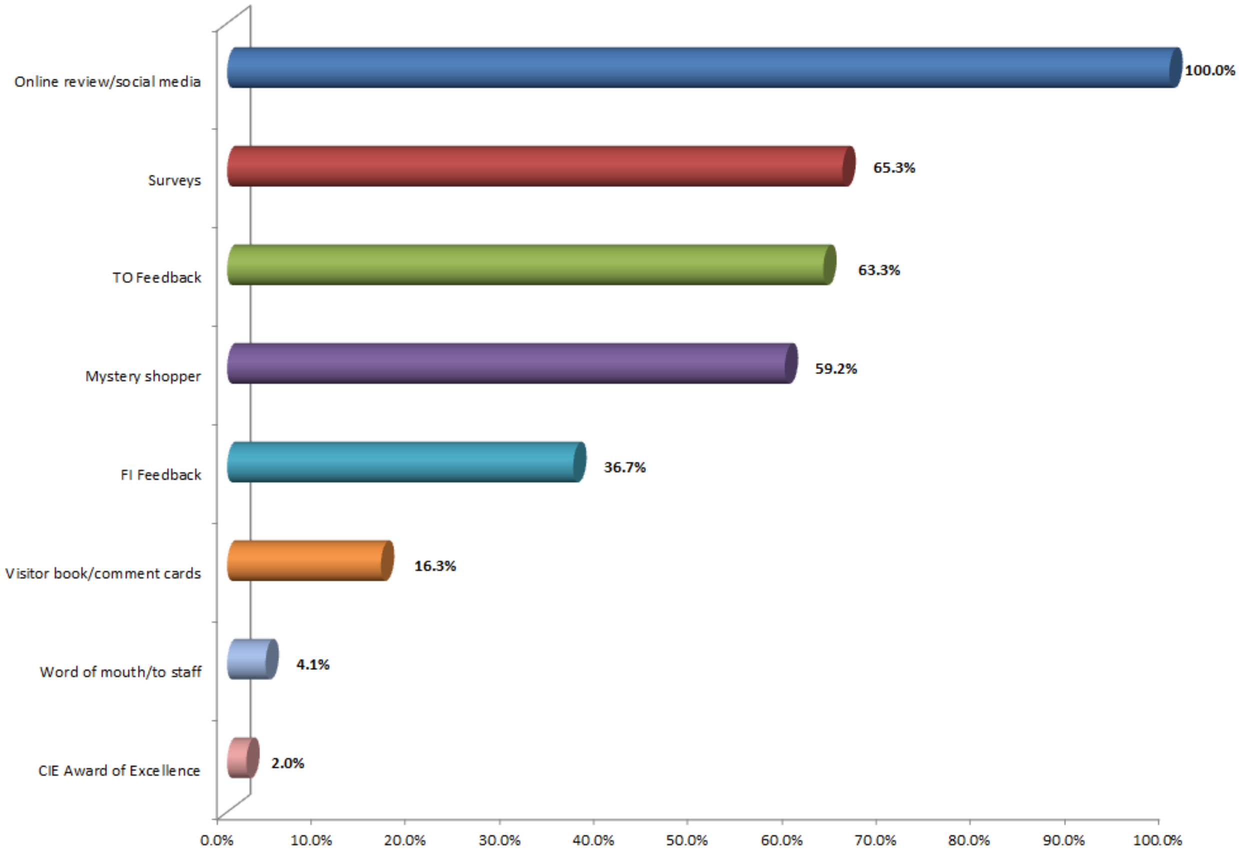




5.4 Measurement of Quality and Customer Satisfaction

As highlighted in Figure 5.5, of the 49 (64%) of the 77 survey respondents who answered this question, all unanimously highlighted the utmost importance of online reviews and social media in measuring experience quality and customer satisfaction. Surveys, tour operator feedback and mystery shopper feedback followed as the next most frequently used mechanisms mentioned.

Figure 5.5: Visitor Experience Quality and Customer Satisfaction



5.5 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 5.6 shows, 77% of respondents have integrated ticketing systems, and 85% 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, and less than one in eight sell more than 30% of their tickets on-line.

Figure 5.6: Use of EPOS & On-line Ticket Sales

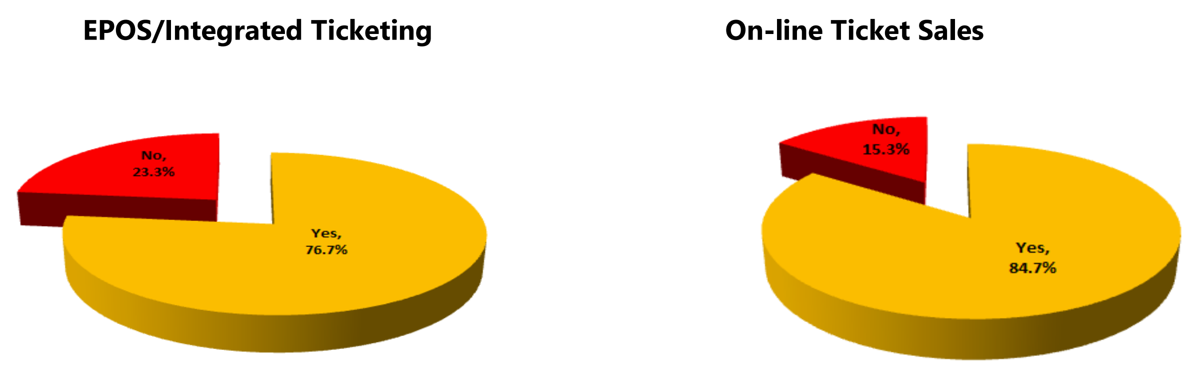


Figure 5.7: Percentage of your Ticket Sales Purchased On-Line for Sites Selling On-Line

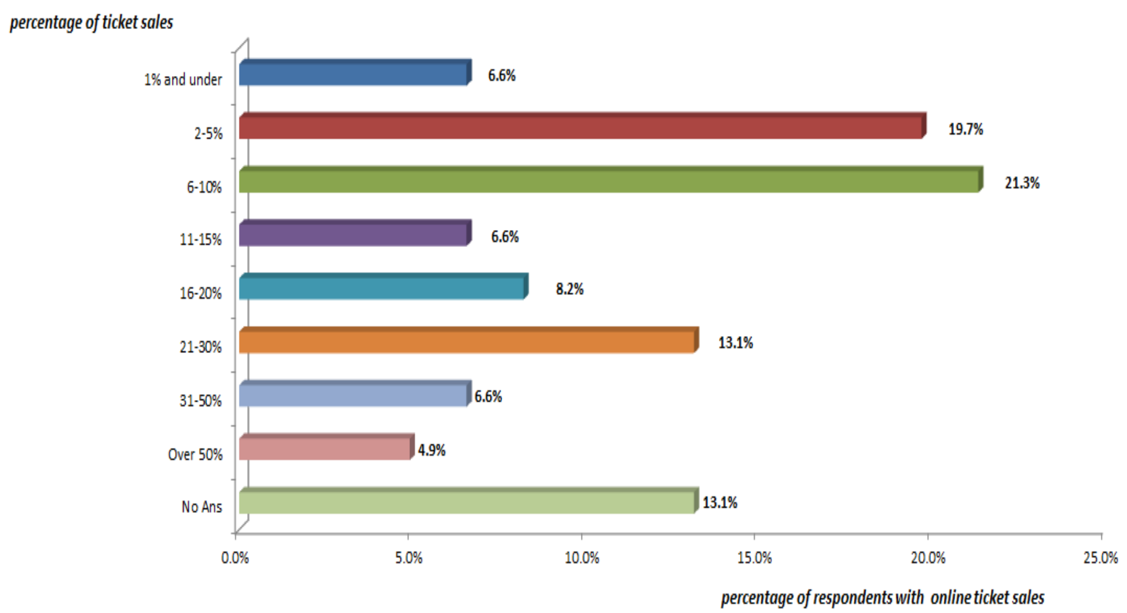


Figure 5.8: Do you charge an online booking fee?

Over 85% of respondents do not charge an online booking fee.

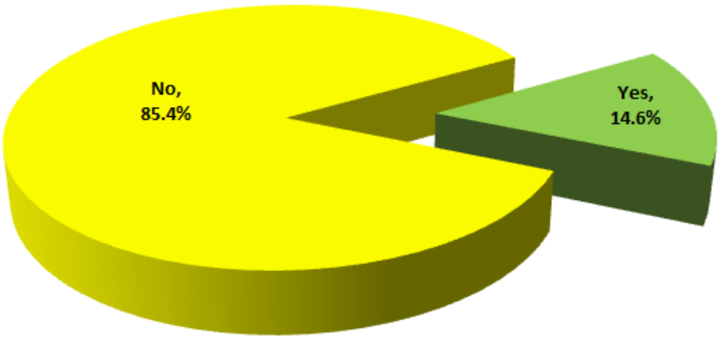
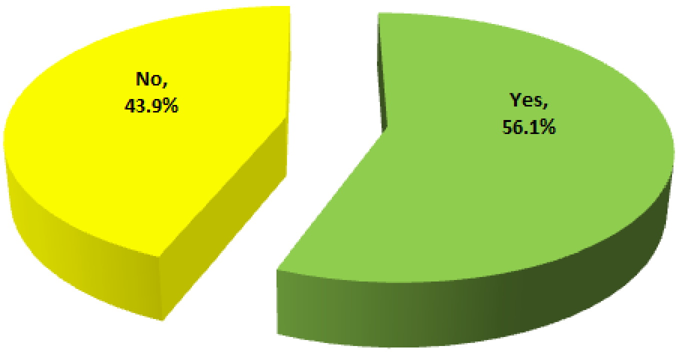


Figure 5.9: Do you give a discount to online bookings?

Over half of respondent attractions do give a discount to online bookings.



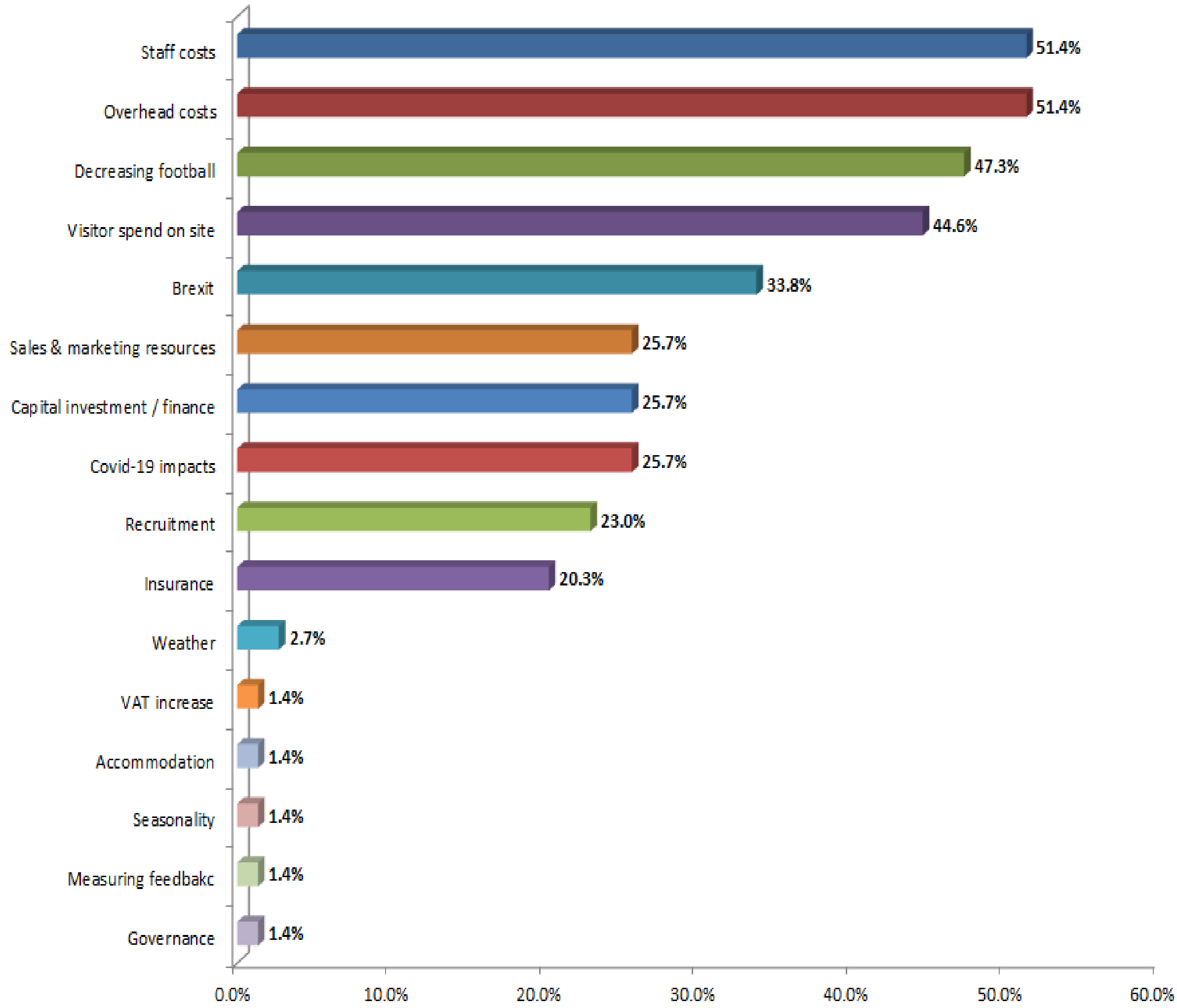
6. LOOKING AHEAD

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

In advance of the Covid-19 pandemic, survey respondents identified a wide range of issues that need to be addressed in the year ahead, as shown in Figure 6.1. The top four are essentially about money, which indicates that there is considerable ongoing pressure on attraction operators to both contain costs and to generate increased revenues, and it can be expected that these have all greatly intensified since the onset of the Covid-19 pandemic. The five most commonly mentioned challenges were:

- staff costs
- overhead costs
- decreasing football
- visitor spend on site
- Brexit.

Figure 6.1: Challenges Ahead



7. APPENDICES

Appendix 1:

List of Members 2019

A1. LIST OF MEMBERS 2019-20

14 Henrietta Street
Adare Heritage Centre
Aillwee Cave and Birds of Prey Centre
Airfield Estate
Áras Uí Chonghaile - James Connolly Visitor Centre
Ardgillan Castle
AVIVA Stadium
Birr Castle Gardens & Science Centre
Book of Kells - Trinity College
Brú na Boínne - Newgrange
Bunratty Castle
Butler House
Castletown House
Chester Beatty
Christ Church Cathedral Dublin
Cliffs of Moher Visitor Experience
Clondalkin Round Tower
Cobh Heritage Centre - The Queenstown Story
Dalkey Castle & Heritage Centre
Donegal Castle
Doolin Cave
Dublin Castle
Dublin Liberties Distillery
Dublinia
Dún Aonghusa
Dunbrody Famine Ship
EPIC - The Irish Emigration Museum
Explorium
Foxford Woollen Mills
GAA Museum & Croke Park Tours
Glasnevin Cemetery Museum
GPO Witness History
Guinness Storehouse
Hillsborough Castle
HMS Caroline, National Museum of the Royal Navy
Hook Heritage
House of Waterford Crystal
Imaginosity, Dublin's Children's Museum
Irish National Stud & Gardens
Irish Rock n Roll Museum
Irish Whiskey Museum
Jameson Distillery Bow St.
Jameson Distillery Midleton
Kilbeggan Distillery and Visitor Centre
Kilkenny Castle
Kilkenny Civic Trust
Kilmainham Gaol
King John's Castle
Kylemore Abbey & Gardens
Linen Mills Studios
Loftus Hall
Lough Gur Heritage Centre
Lough Key Forest & Activity Park
Malahide Castle
Medieval Mile Museum
MoLI - Museum of Literature Ireland
Mount Congreve Estate
National Botanic Gardens
National Gallery of Ireland
National Leprechaun Museum of Ireland
National Library of Ireland
National Museum of Ireland - Country Life
National Museum of Ireland - Decorate Arts & History
National Museum of Ireland - Natural History
National Trust - Giant's Causeway
National Wax Museum Plus
Newbridge Silverware
Oakfield Park
Pearse Lyons Distillery
Phoenix Park Visitor Centre
Powerscourt Distillery
Powerscourt Estate & Gardens
Rediscovery Centre
Rock of Cashel
Roe & Co
Rothe House Museum & Gardens
Russborough House & Parklands
Saint Patrick's Cathedral
SEA LIFE Aquariaum Bray
Skerries Mills
Smithwicks Experience
Spike Island
St Canice's Cathedral
Swords Castle
Tayto Park
Teeling Whiskey Distillery
The Shed Distillery
Thomond Park Stadium
Titanic Belfast
Titanic Experience Cobh
Tullamore D.E.W Visitor Centre
Ulster American Folk Park
Ulster Folk & Transport Museum
Ulster Museum
Waterford Treasures
Wells House
Westport House
Wicklow Gaol
Windmill Lane Recording Studios
Youghal Clock Gate Tower

Appendix 2:

Survey Questionnaire

A2. SURVEY QUESTIONNAIRE

CHL

ASSOCIATION OF VISITOR EXPERIENCES & ATTRACTIONS

ASSOCIATION OF VISITOR EXPERIENCES & ATTRACTIONS
Survey of Business Performance, 2019

Please return the completed survey form by e-mail to smcmahon@chl.ie by Monday March 9th 2020

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 2019, 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 9th March 2020. 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 2019

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) — State / local authority
private (not for profit) — 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 — Maintenance
Food & Beverage — Other *(please specify)*
Cleaning

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 2019, 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 2019 (net of VAT)? €

10b) Have you increased your ticket prices for 2020? — Yes — No

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

11) Retail sales: what was the average retail spend per visitor in 2019 (net of VAT)? €

12) Café/restaurant: what was the average food & beverage spend per visitor in 2019 (net of VAT)? €

13) What was the breakdown of your operating expenditure in 2019 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?**
d) Do you charge an online booking transaction fee? — Yes — No
e) Do you give a discount to online bookings? — Yes — No

YOUR VISITORS

15) How many visitors did you receive in 2019?

15b) By what methods do you count your visitors? *(pls insert 'X' in the appropriate boxes)*

Category	
ticket sales	
camera / electronic sensor	
entry turnstile	
manual counter / clickers	
Other *(please specify)*	

15c) Do you count free admissions? — Yes — No

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 2019?

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%

18) What was the seasonal distribution of your business in 2019?

Month	% share of visitors	Month	% share of visitors
January		July	
February		August	
March		September	
April		October	
May		November	
June		December	
		Total	0.0%

19) How do you measure visitor experience quality and customer satisfaction?
(pls insert 'X' into all that apply)

Category	
surveys	
mystery shopper	
online review sites (e.g. TripAdvisor)	
Tour operator feedback	
Failte Ireland feedback	
Other (please specify)	

YOUR STAFF

20) How many staff do you employ?

Category	No.
Full time	
Part time	
Seasonal	
Total	0

21) 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		
i) Other (specify)		

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

FINAL OBSERVATIONS

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

Challenges	
Decreasing footfall	
Visitor spend on site	
Recruitment	
Staff costs	
Overhead costs	
Sales & marketing resources	
Capital investment /finance	
Brexit	
Insurance	
Other (specify)	

23) What are your expectations/targets for 2020?
Increase/decrease in visitor numbers (insert % (+/-))

24) What would you like to see AVEA do more of?

THANK YOU FOR YOUR TIME AND CO OPERATION

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