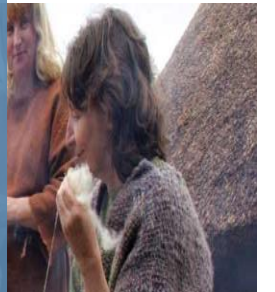




WHAT MAKES A GREAT VISITOR ATTRACTION?



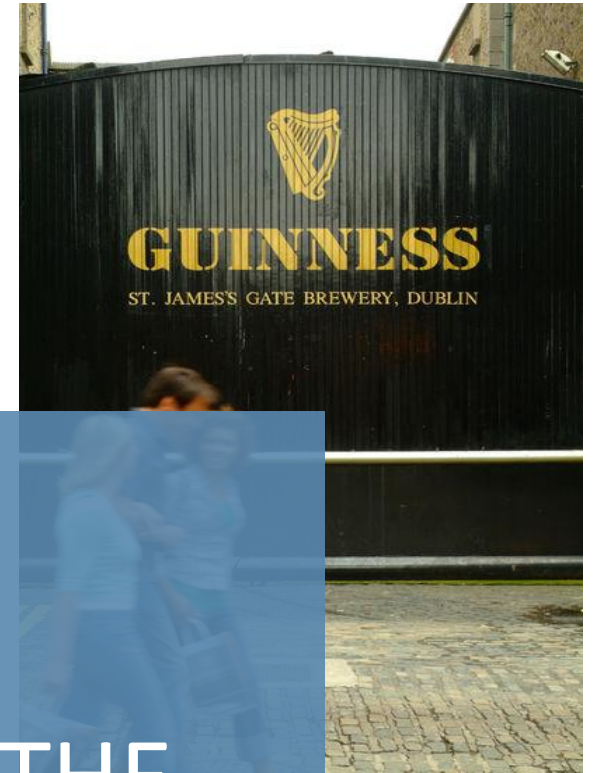
Visitor Attraction Research (2016)



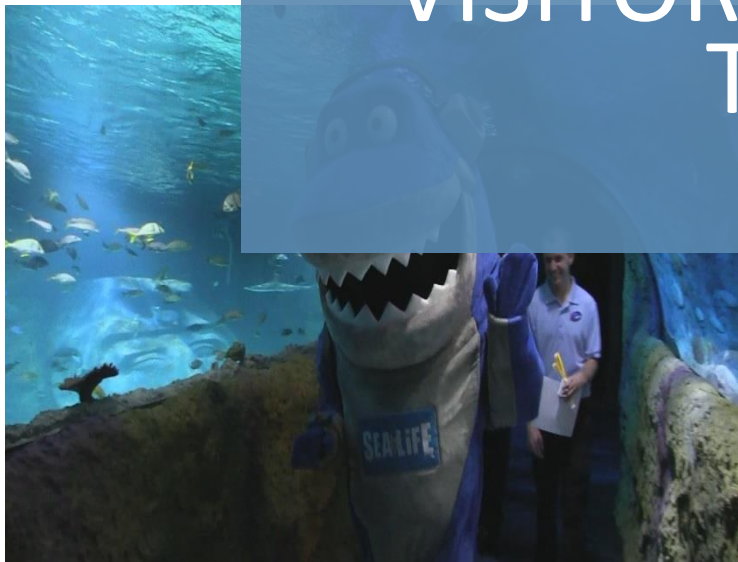
Content.....

- **Context** Review of tourism numbers and revenue
- **Importance of Attractions** Visitor's attractions role in the tourism experience
- **Increasing Satisfaction** What makes a good visitor attraction
 - Pilot research in Ireland
 - Methodology
 - Key findings
- **Summary & Conclusions**





CONTEXT
&
VISITORS ATTRACTIONS ROLE IN THE
TOURISM EXPERIENCE



International Tourist Numbers - 2016

8.7 million



3,630,000
Tourists



1,294,000
Tourists



624,000
Tourists



494,000
Tourists



370,000
Tourists



326,000
Tourists

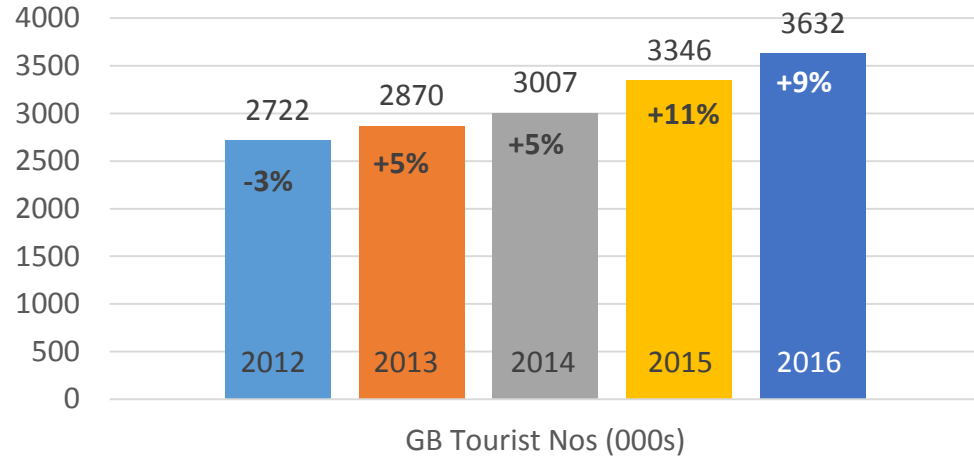


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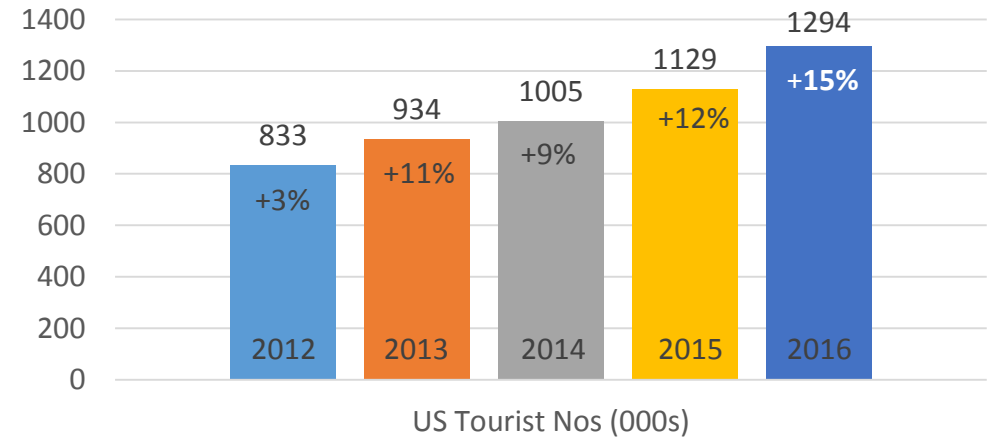
Source: CSO, Fáilte Ireland SOT 2016

International Tourist Numbers – by Market

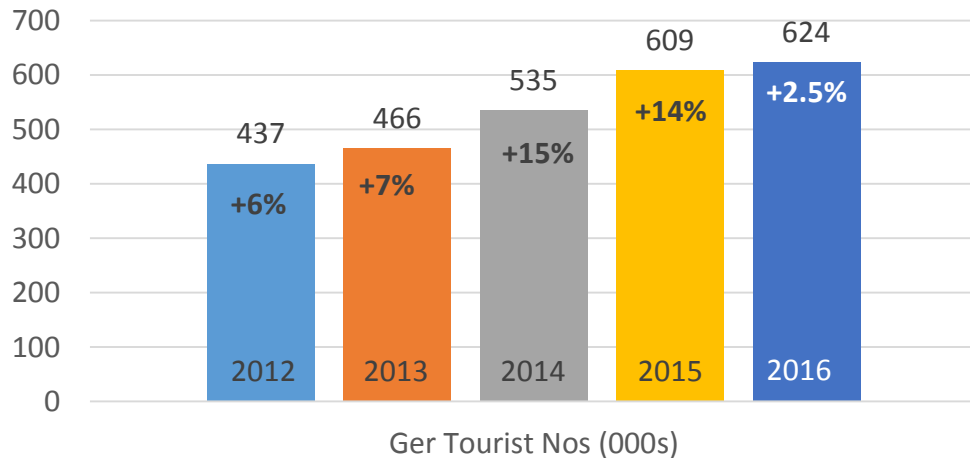
GB Tourist Numbers (000s)



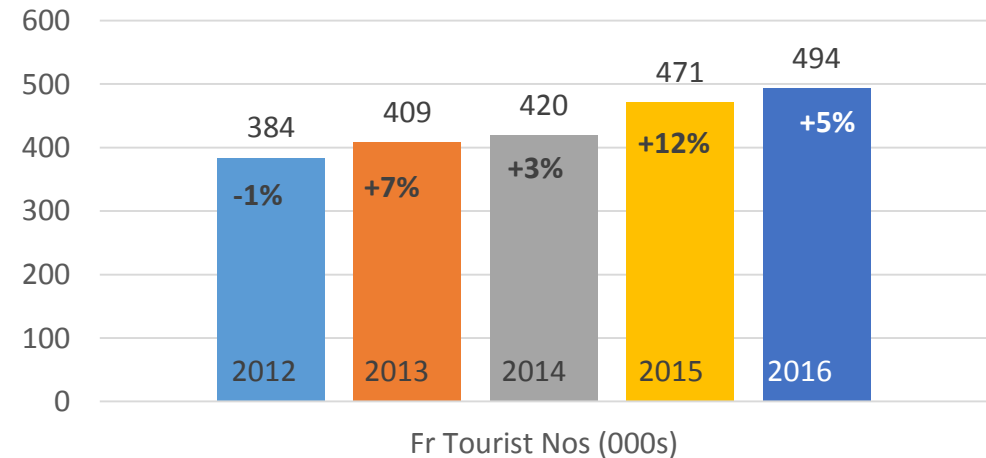
US Tourist Numbers (000s)



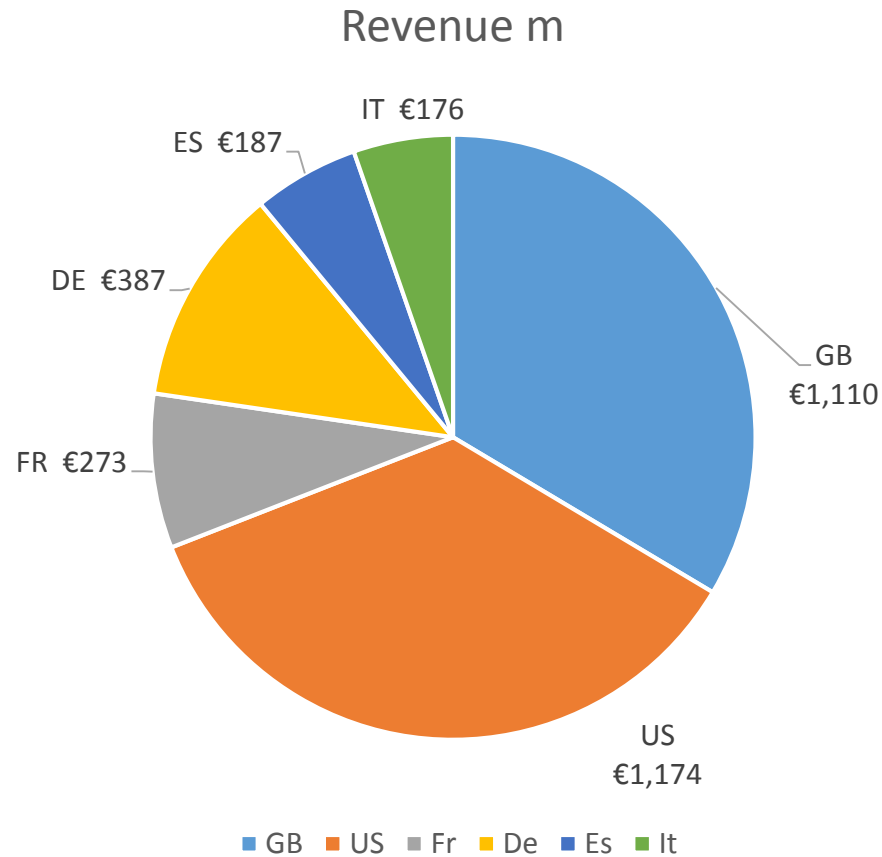
German Tourist Numbers (000s)



French Tourist Numbers (000s)



Revenue 2016



- US highest yielding market
GB – 3 times the tourist numbers
- US surpassed Britain as international market generating largest revenue for Ireland in 2015 & sustained it in 2016
- US strong performance attributable to
 1. Long Haul
 2. Increasing US numbers &
 3. Longer average stay



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Tourist

Trip includes at least one overnight

Holidaymaker



Visiting
Friends &
Relatives
(VFR)



Tourist
Business



Other



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Cultural/Historical Visits (2016)

2016 65% of tourists visited some form of Cultural/Historical Attraction

2016 80% of Holidaymakers visited some form of Cultural/Historical Attraction

Market Breakdown of Holidaymaker Visits to Cultural/Historical Attraction

US 93% of US Holidaymakers

Mainland Eur 83% of Mainland Europe Holidaymakers

Long Haul 99% of Other long haul Holidaymakers

GB 70% of GB Holidaymakers



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Information Sources that Influenced the Choice of Ireland



Word of mouth and personal recommendations are very important factors influencing potential visitors to book Ireland

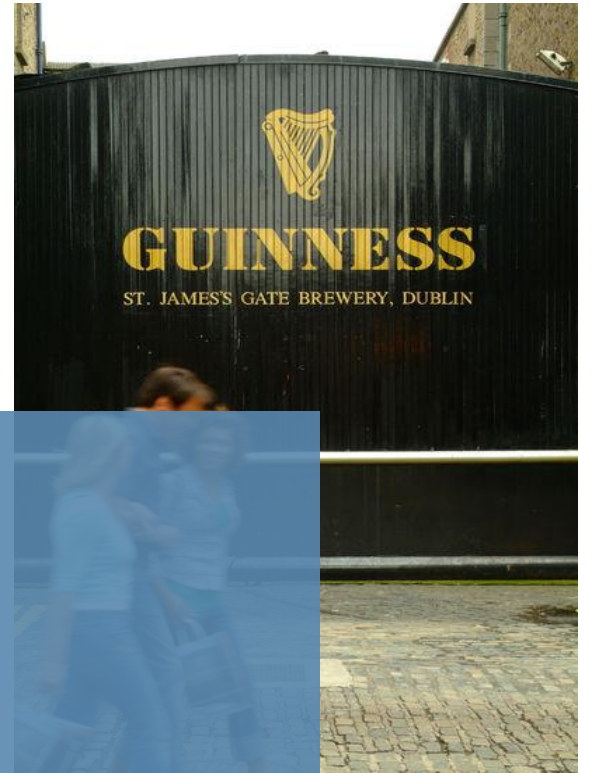
	Total %	Britain %	North America %	Total M Europe %	France %	Germany %
Internet	53	46	52	56	58	56
Friends/relatives/business associates	51	54	56	45	43	47
Guide books	20	11	24	23	29	24
Travel Agent/ Tour Operator	9	4	16	7	8	6
Brochures/promotional literature on Ireland	9	4	12	9	8	10
Films/movies/TV Drama	7	3	8	9	12	8
Travel programmes on TV/radio	6	4	7	7	7	7
Advertising for Ireland	6	4	6	7	10	6
Tourist Board literature	4	4	3	6	8	4
Articles in newspapers/magazines	4	2	4	4	5	4

Source in <u>planning</u> a holiday in Ireland	Total %
Internet	30
Friends/relatives/business associates	28
Guide books	23
Travel Agent/ Tour Operator	12
Brochures/promotional literature on Ireland	6
Tourist Board literature	5
Articles in newspapers/magazines	2



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Source: 2016 VAS Port Survey - 1,996 overseas holidaymakers



VISITOR RESEARCH



Visitors Attractions Research Sept/Oct 2016

- Pilot study carried out on behalf of Fáilte Ireland by Behaviour & Attitudes (B&A)
- 16 Cultural & Heritage visitor attractions
 - 6 from Wild Atlantic Way
 - 5 from Ireland's Ancient East
 - 5 from Dublin
- 2,402 visitor interviewed, of which 2,021 were overseas (84%)

Research Objectives & Methodology

Research designed to gain an understanding of:

- **Satisfaction:** Visitor's **benchmark** levels of overall satisfaction with their experience
 - **Interaction:** How visitors **find out about, use and interact** with Visitor Attractions
 - **Development:** Gauge visitor reaction to facilities and services with particular regard to the **interpretation and presentation**
- **Dual methodology** (quantitative and qualitative research)
 - **Quantitative** research
 - benchmarked satisfaction levels
 - driver analysis of components that are most vital to creating memorable visitor experiences.
 - **2,402 face to face interviews** were conducted in total (150 per visitor attraction)
 - **Qualitative** research supplemented the driver analysis - further layer of understanding on the components of a positive or negative visitor experience.
 - 4 - 6 focused in depth interviews in each visitor attraction



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Evaluation Criteria

1. Exterior
2. Amenities & Staff
3. Interior & Layout
4. Presentation & Exhibits
5. Information Tools
6. Storytelling
7. Tour

1. EXTERIOR

The quality of the **signposting** to (Name of Attraction)

The **outside of the building** and grounds being clean, well maintained and free from rubbish

Car **parking**

Cost of entry to the Visitor Centre itself (ASK ONLY AT PAID ATTRACTIONS)

2. AMENITIES & STAFF

Being greeted as you arrived in the Visitor Centre in a **friendly manner**

The **availability of staff** members when required

Staff members appearing **knowledgeable** about the exhibits and overall presentation

The quality of the **restaurant/cafe/coffee shop** in the Visitor Centre

The quality of the Visitor Centre **Shop**

Cleanliness of public **toilets**

3. INTERIOR/LAYOUT

The visitor centre overall being **clean, tidy and well maintained**

The various **sections** of the visitor centre being clearly signed and **easy to locate**

The **ease** with which you were able **to move through** the various sections of this visitor centre

4. PRESENTATION AND EXHIBITS

The **exhibits** on display being **well maintained** and preserved

The **relevance of the exhibits** to the story being told at the visitor centre

The venue being well lit and it being **easy to see** the **exhibits** and other information

The quality of any **written explanations** of the exhibits

Quality of **literature available** about the visitor centre and its' exhibits

The **order/ flow of the sections** of the exhibits helping to present a clear story

5. INFORMATION TOOLS

Satisfaction with **audio guides** available (FILTER BASED ON USE)

Satisfaction with **films/ slide shows** available (FILTER BASED ON USE)

Satisfaction with **interactive tools/** touch screens etc. available (FILTER BASED ON USE)

Satisfaction with **apps** for the visitor centre (FILTER BASED ON USE)

*All **Information** at the venue being accessible to those **not fluent in English**)*

6. STORYTELLING

The extent to which you now feel you **understand the story** told at this visitor center

The **story** presented being **interesting**

The **story** presented being **entertaining**

The **story** presented feeling **unique to Ireland**

The extent to which this venue brought the story to life; creating a sense that you could **see, feel and live the history** being presented

The extent to which you feel you **learnt anything new** today from your visit to (NAME OF ATTRACTION)?

7. TOUR

The length of time/ **duration** of the **tour**

Tour Guide maintaining **interest levels** among customers of all ages during the tour

Tour Guide communicating in an **entertaining** manner

Tour Guide **interacting** well with visitors

Tour Guide being **passionate** about the story being told

Tour Guide's ability to effectively **answer any questions**

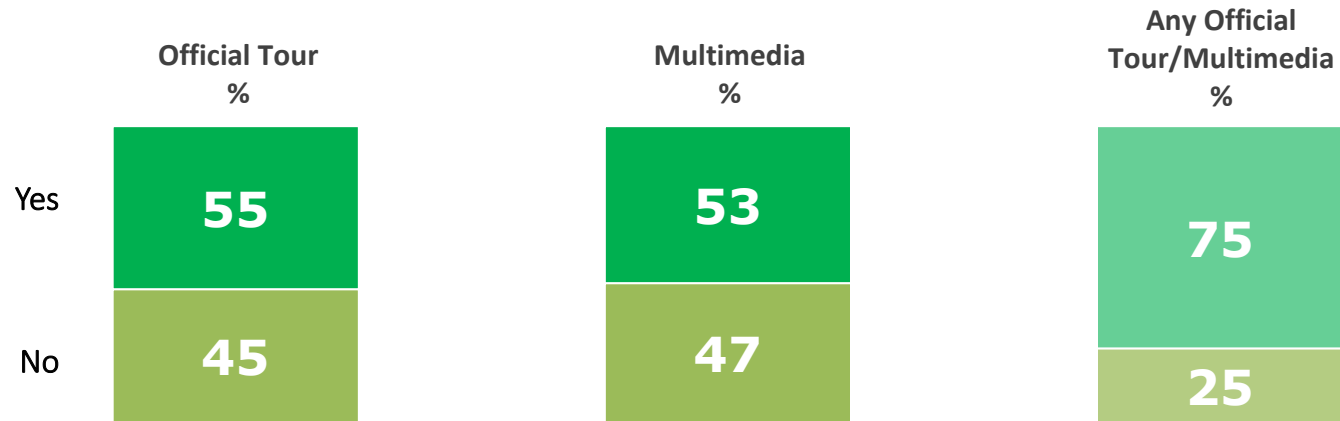
Satisfaction with the **tour overall**



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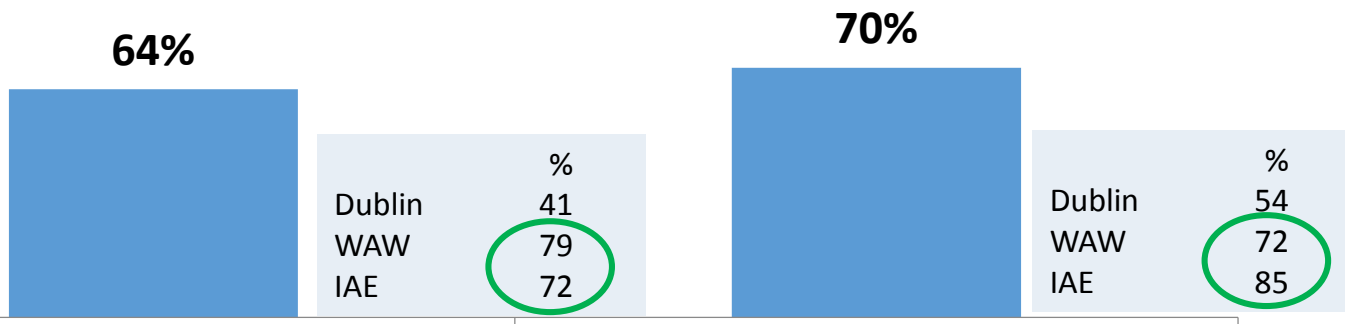
Usage of Formal Storytelling Facilities/Visitor Centre & Coffee Shop

Base: All visitors n=2,402



Restaurant, Café, Coffee Shop

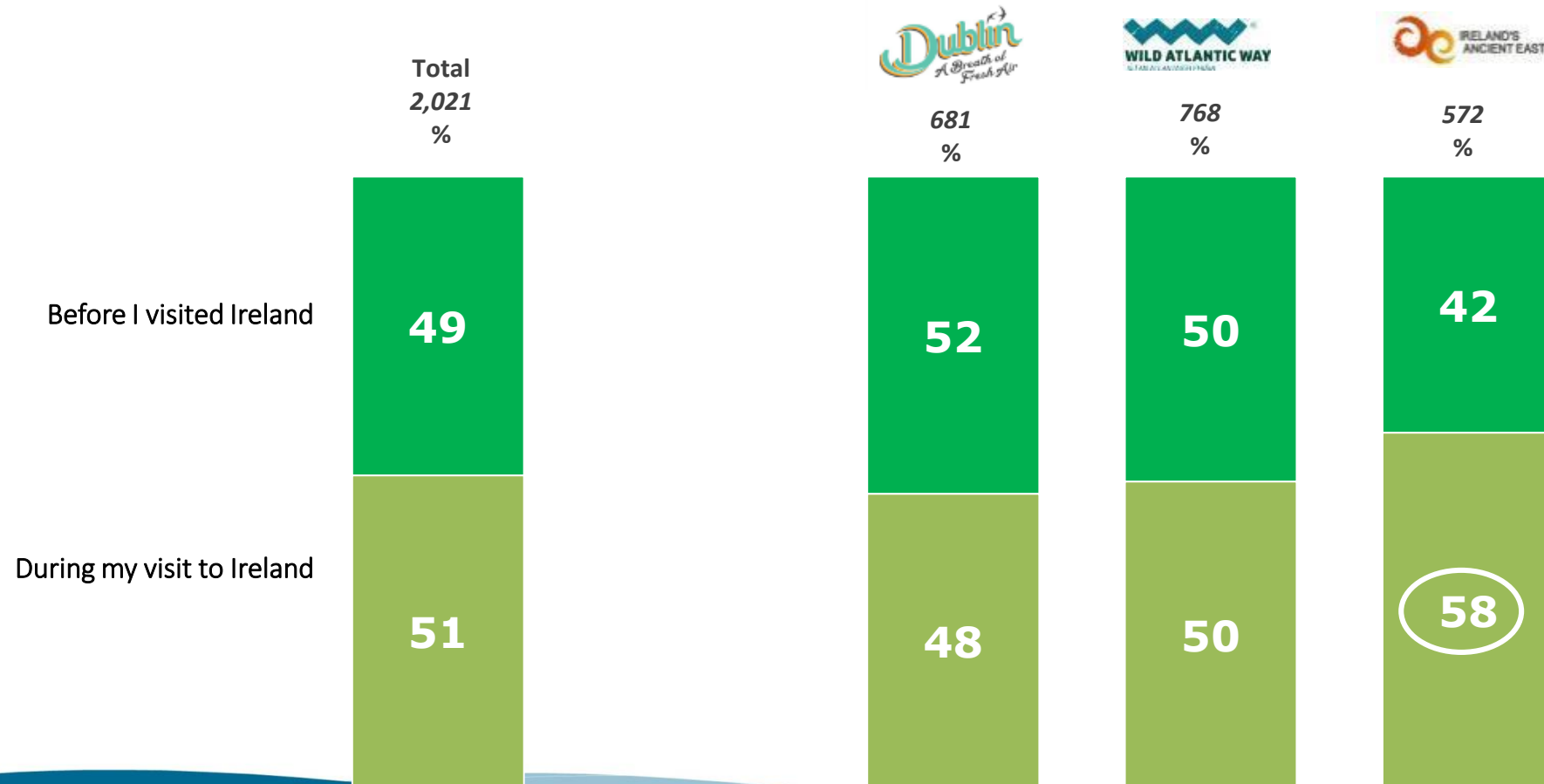
Visitor Centre/Museum Shop



- Just over half of all visitors used the official tour or multimedia options at the visitor attractions, setting a benchmark for ‘participation’ and indicating the importance of self directed browsing.
- Incidence of participation in official tours is almost identical between those with and without English as first language
- Overall, 64-70% of visitors use café and shop facilities at the Visitor Attractions; usage rates are much higher outside Dublin.

When did Overseas Visitors First Hear of Attraction

Base: Overseas visitors n=2,021



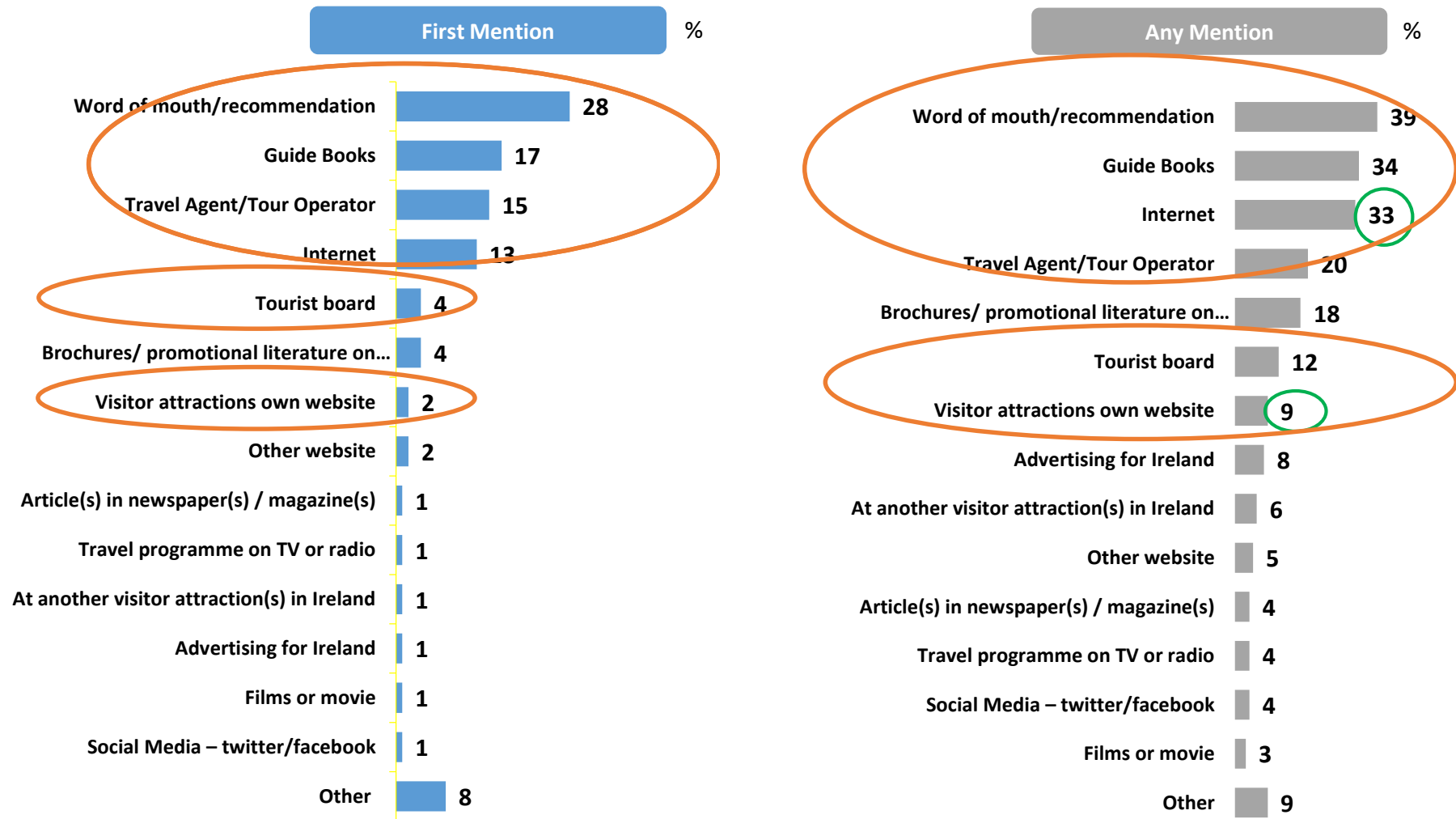
While prior awareness of attractions is strong, on the ground promotion remains vital, especially in Ireland's Ancient East



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Information Sources: Where did you hear about this experience?

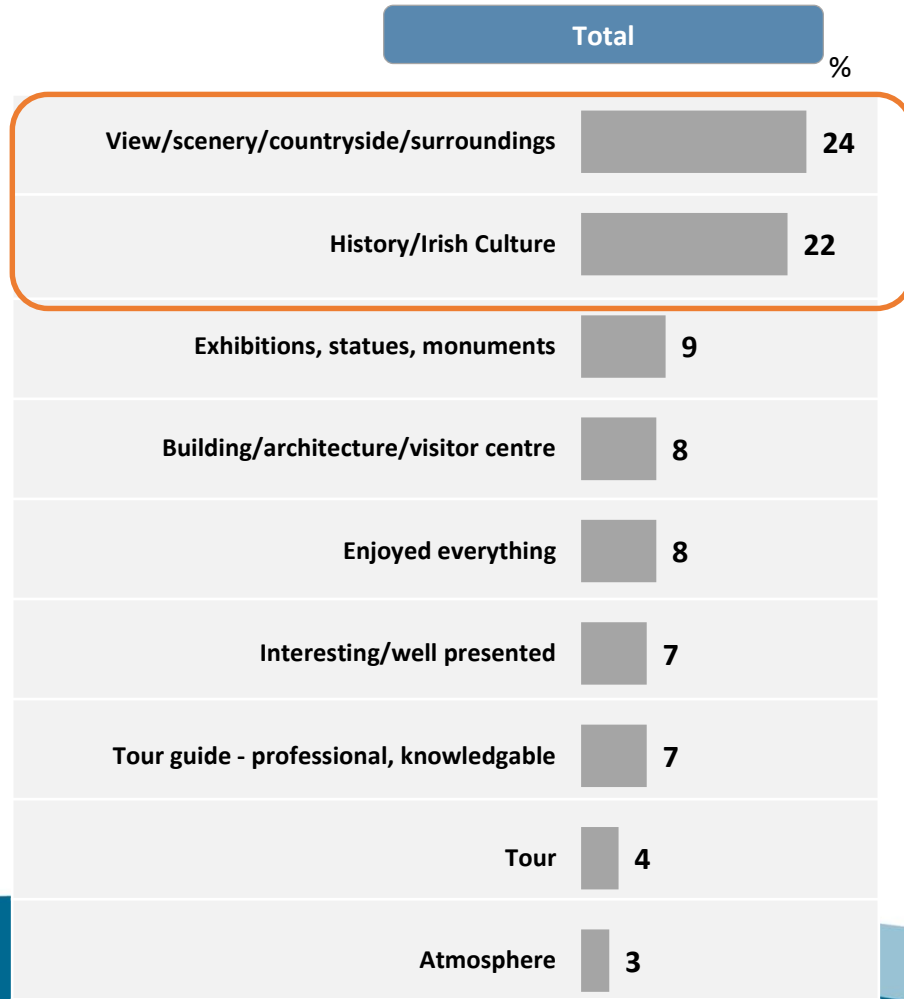
Base: Overseas visitors n=2,021



Word of Mouth, Guide Books, Travel Agents all vital sources of information. Prominence of 'Internet' is contrasted against minor references to visitor attractions own websites.

Key Enjoyable Aspects: Spontaneous Replies

Base: All visitors N = 2,402



- Scenery and culture lead the spontaneous enjoyment references
- Scenery of vital importance for Wild Atlantic Way attractions
- History and Cultural appeal in Dublin and Ireland's Ancient East



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Key Driver Analysis

Overall ranking of criteria's impact on satisfaction

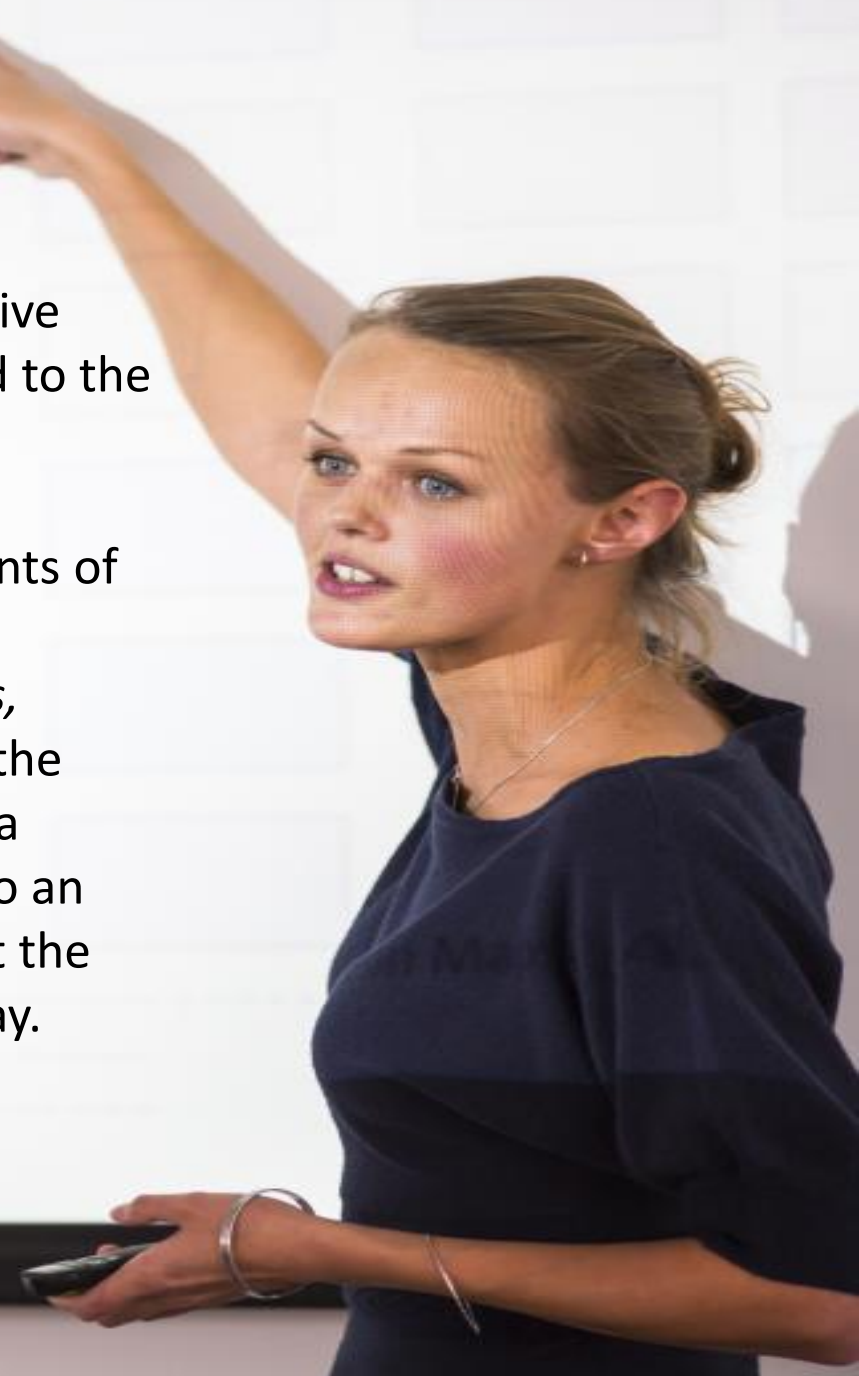
All visitors N = 2,402

TOP 20	
1	Tour Guide interest levels
2	Tour overall
3	Tour Guide passionate
4	Tour Guide entertaining
5	Tour Guide answer questions
6	Cost of entry
7	Tour Guide interaction
8	Interactive tools
9	Audio guides
10	Story interesting
11	Films/ slide shows
12	Story entertaining
13	Relevance of the exhibits
14	Quality of Shop
15	Apps
16	Restaurant/cafe/coffee shop
17	See, feel and live the history
18	Availability of staff
19	Understand the stories
20	Staff knowledgeable

Many of the criteria that drive high satisfaction are related to the delivery of the tour.

The more functional elements of the experience (*toilets, maintenance of the exhibits, signposting etc*), while not the main reason for increasing a visitors satisfaction, if not to an acceptable level can impact the experience in a negative way.

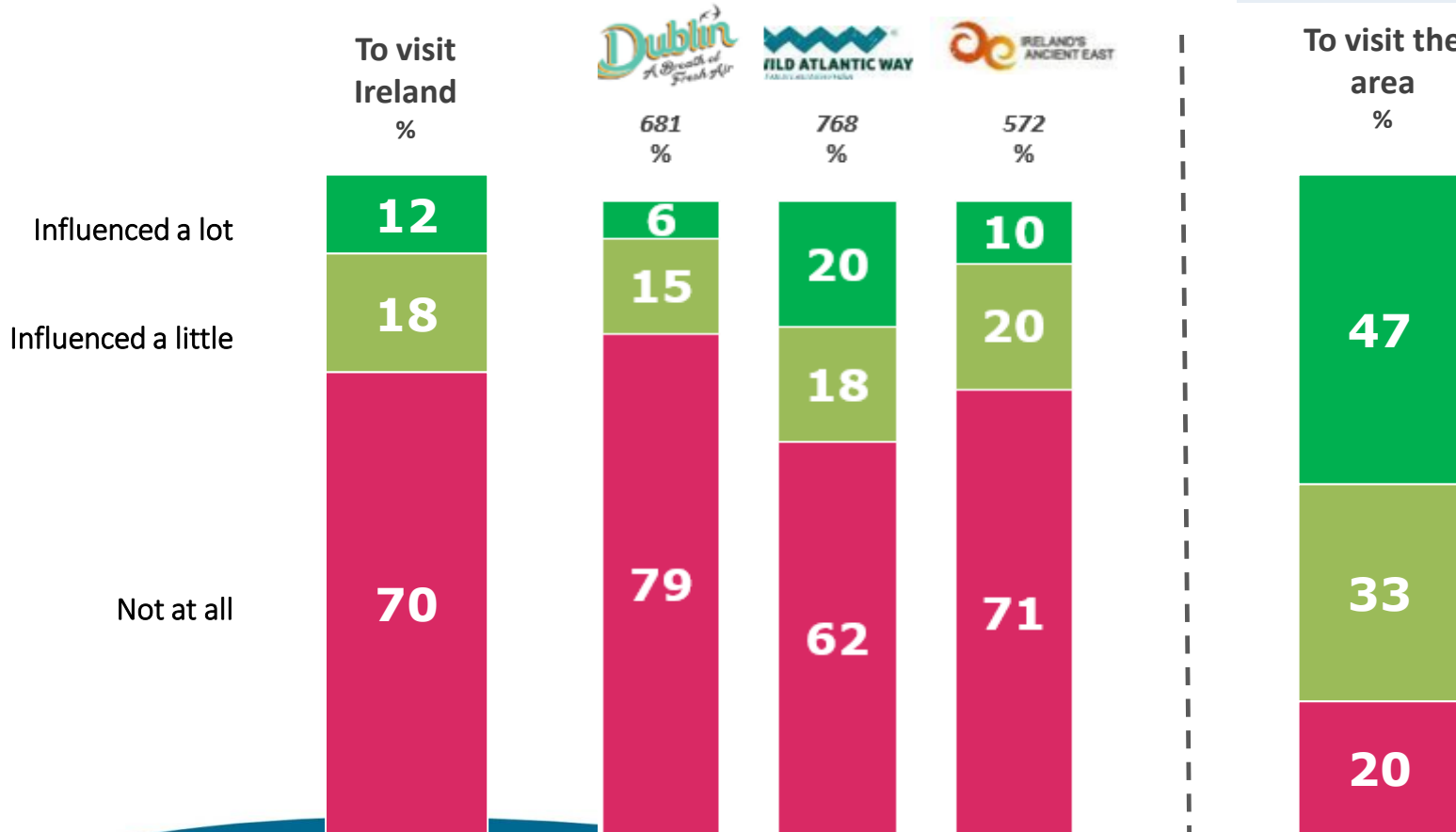
Tour delivery and media presentation act as the key drivers of satisfaction overall – when they are used



Influence of Attractions

Base: Overseas visitors n=2,021

	%
Dublin	40
WAW	45
IAE	58



- 30% Overseas Visitors were influenced a little or a lot by attractions in their decision to visit Ireland
- Strength of influence was highest amongst Wild Atlantic Way attractions

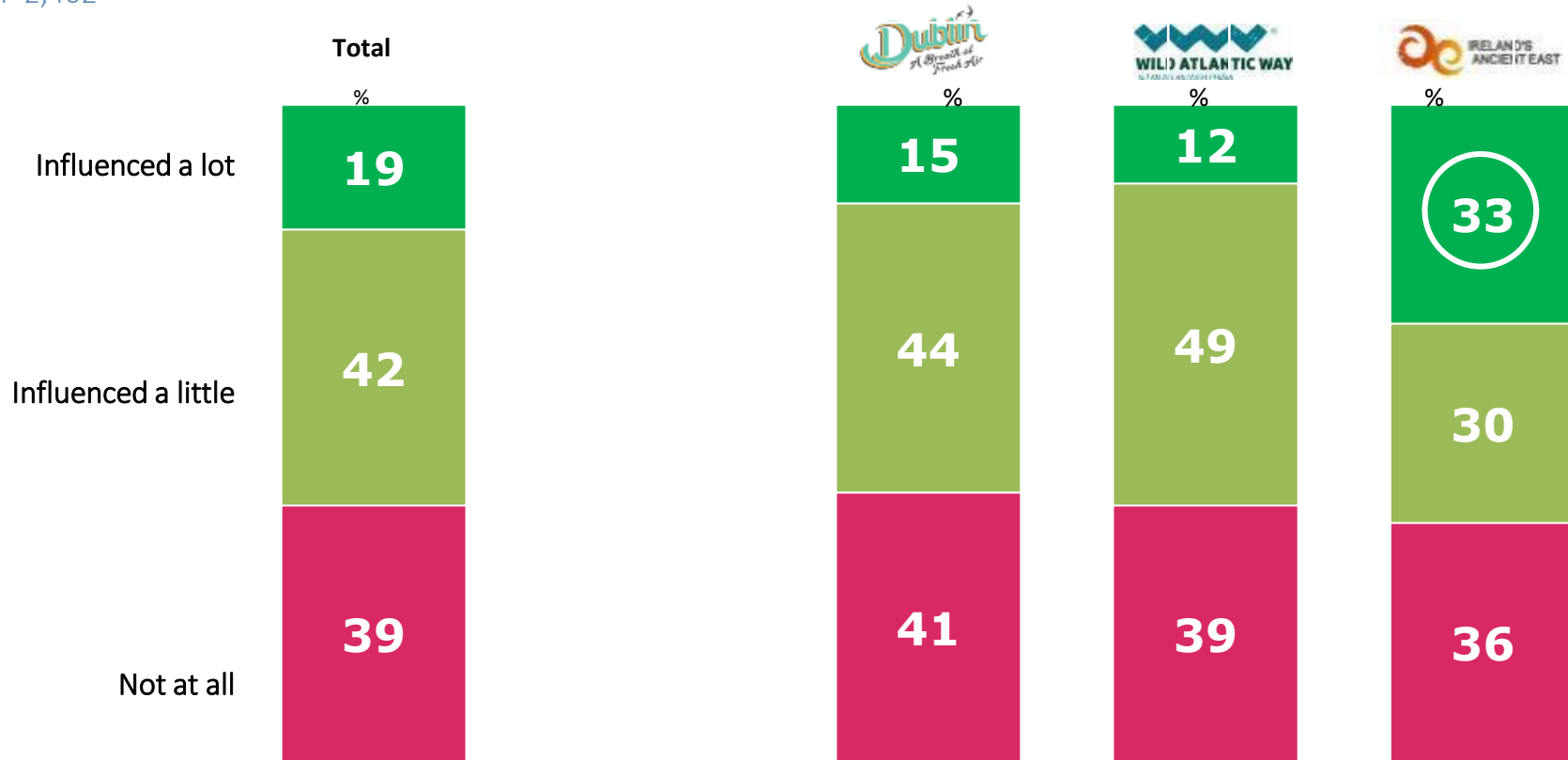


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Cross Promotion/Inspiration

Did your visit inspire you to visit any other visitor centres

Base: All visitors n=2,402



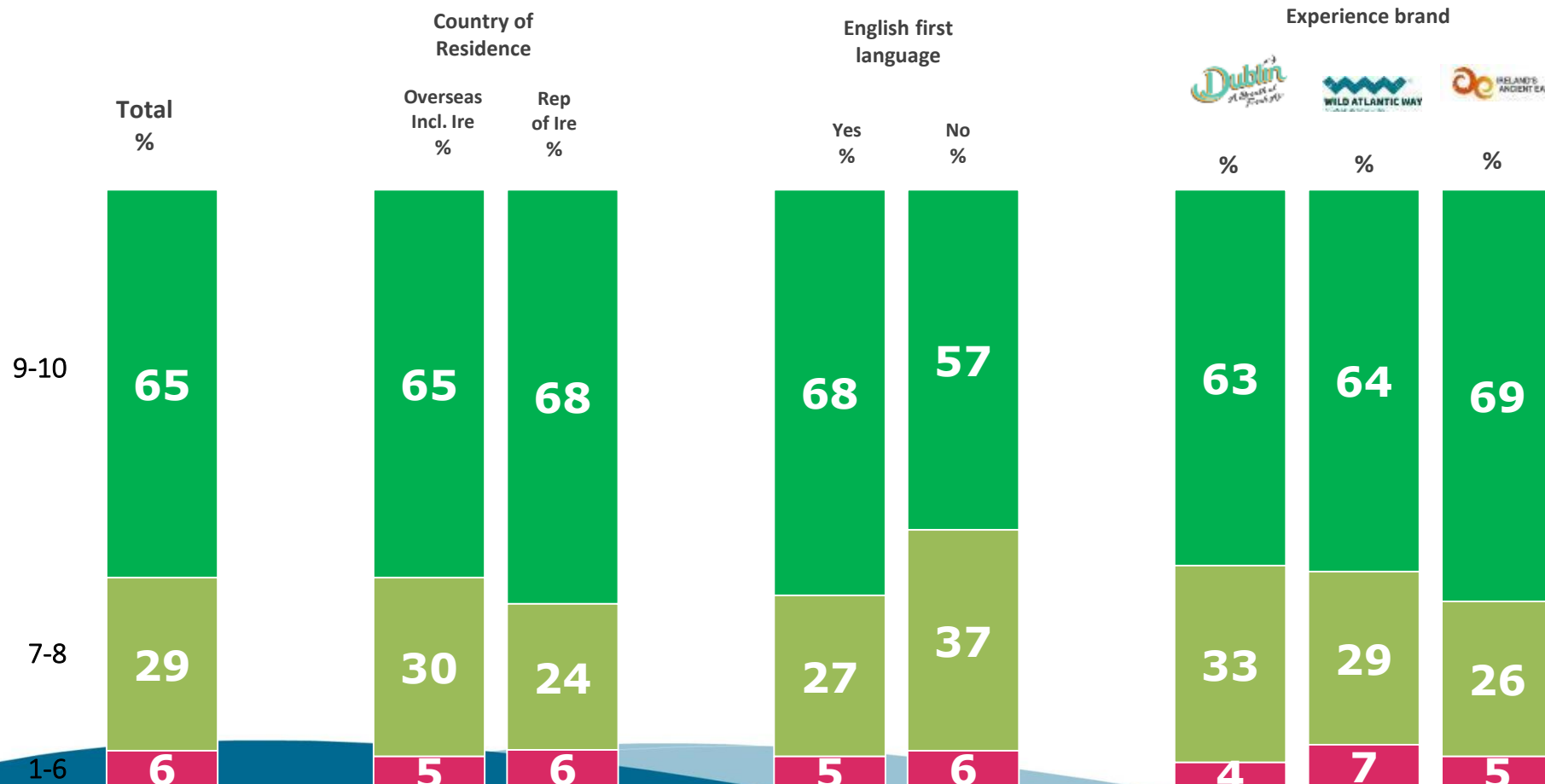
33% of visitors to attractions in Ireland's Ancient East were influenced a lot to visit another attraction



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Value of Money of Visitor Attraction Experience

Base: All visitors n=2,402



Perceived value for money is strong across all analytic groups and peaks in Ireland's Ancient East

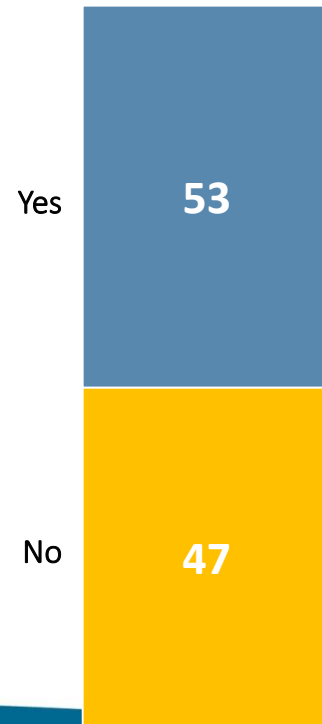


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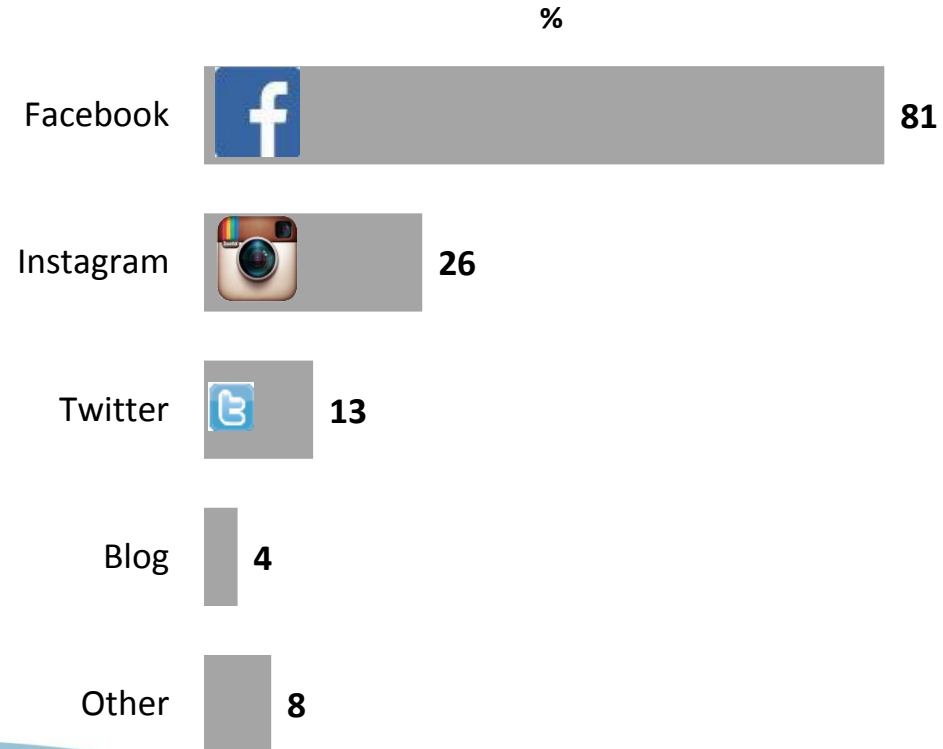
Use of Social Media to Post about Visitor Attraction

Base: Overseas visitors n=2,021

Would post on social media about the event %

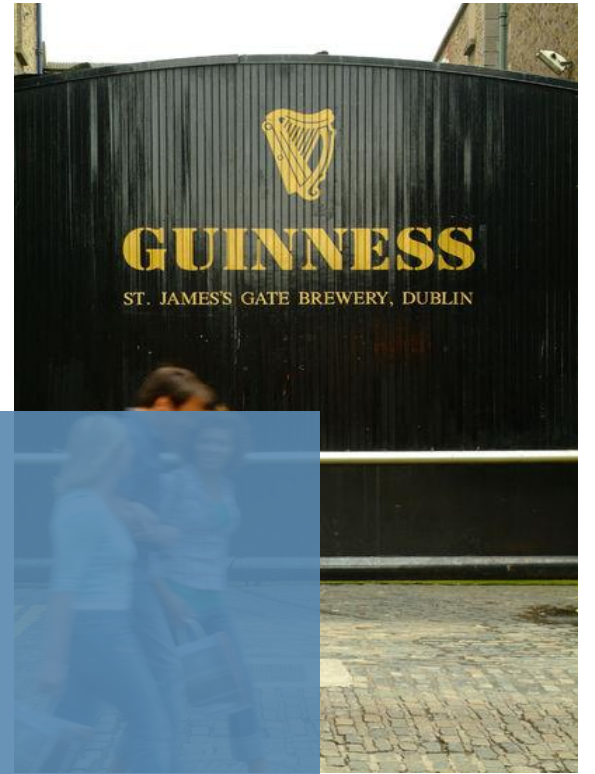


All who would post online about the event %



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Q. Have you, or do you think you might at some stage, use any of the following social media to post information about (.....) i.e. post photos or discuss with friends?



SUMMARY & CONCLUSIONS



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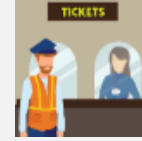
Key Findings Visitor Attraction Research 2016

1. Tours and Storytelling make all the difference



Tours, tour guides and storytelling are typically the key drivers of a highly satisfied visitor experience. Memorably recalled moments often included unusual story vignettes around people, rituals and events.

2. Keep Transactions Simple



A recurrent visitor criticism relates to the cost of the overall visit. Reservations could relate to the cost of entry and/or the number of times visitors were separately required to pay for access and services.

3. Ensure Layouts are Coherent



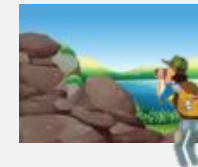
At multiple venues, Visitors found the interior and/ or exterior layouts to be confusing and to negatively affect their understanding of the story being presented.

4. Remember the Person in the Crowd



The challenge of managing large groups of people through a single environment prompted requests for improvements to crowd, noise and time management; driven by the common desire for a more relaxed visitor experience.

5. Location, Location, Location



There is clearly an opportunity, especially outside Dublin, to facilitate a strong desire from Visitors to engage fully with the landscape surrounding the venues; and indeed to celebrate the often long journey visitors have made to reach the venues.



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Key Findings Visitor Attraction Research

1. Tours and Storytelling make all the difference



Tours, tour guides and storytelling are typically the key drivers of a highly satisfied visitor experience. Memorably recalled moments often included unusual story vignettes around people, rituals and events.

Guided tours make all the difference

- Tour Delivery – passionate & informed guides
- Fun as well as informative
- Retellable stories
- Stories to build on what is widely available
- Uniqueness of the story to Ireland



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Key Findings Visitor Attraction Research

2. Keep Transactions Simple



A recurrent visitor criticism relates to the cost of the overall visit. Reservations could relate to the cost of entry and/or the number of times visitors were separately required to pay for access and services.

Keep Transactions Simple

- Aversion to perceived hidden costs
- Good value is important



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Key Findings Visitor Attraction Research

3. Ensure Layouts are Coherent



At multiple venues, Visitors found the interior and/ or exterior layouts to be confusing and to negatively affect their understanding of the story being presented.

Ensure Layouts are Coherent

- Unique delivery of the story
- Easy to navigate and follow layout
- Audio guides for non-English speaking visitors
- Use of media
- Concise interpretation of story



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Key Findings Visitor Attraction Research

4. Remember the Person in the Crowd



The challenge of managing large groups of people through a single environment prompted requests for improvements to crowd, noise and time management; driven by the common desire for a more relaxed visitor experience.

Remember the Person in the Crowd

- Time management of tours
- Interactive elements
- Small intimate groups



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Key Findings Visitor Attraction Research

5. Location, Location, Location



There is clearly an opportunity, especially outside Dublin, to facilitate a strong desire from Visitors to engage fully with the landscape surrounding the venues; & indeed to celebrate the often long journey visitors have made to reach the venues.

Location, Location, location

- Interacting with landscape



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For storytelling interpretation toolkits go to
www.failteireland.ie

Choose **Ireland's Ancient East** – and click **Toolkits for Tourism Businesses** and choose storytelling interpretation toolkits

