What Makes a Great Visitor Attraction

Drivers of Satisfaction Research 2018

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Research

Content

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Importance of Attractions

Visitor attraction's role in the tourism experience

Increasing Satisfaction

What makes a great visitor attraction?

- Objectives & Methodology
- Key Drivers of Satisfaction
- Marketing Insights

Tourists & Attractions

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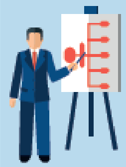
Tourist

Stay one or more nights
(excludes same day travellers)

Holidaymaker

Visiting Friends & Relatives (VFR)

Business Tourist



Other

Type of Attraction	Overseas Tourists
Cultural & Historical Attractions	68%
Houses & Castles	41%
Museums & Art Galleries	26%

Cultural & Historical Attractions: Market Breakdown	
GB	44%
US	90%
Germany	82%
France	79%

Cultural & historical attractions are a major touchpoint with Ireland's key overseas tourist markets

Source: Survey of Overseas Travellers (2017)

Objectives & Methodology

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The Visitor Attractions 2018 research built on the design and findings from the 2016 pilot.

The objective was to gain insight into the visitor experience at Ireland's Visitor Attractions and **identify what drives satisfaction**.

The research was designed to both

- **Assess existing visitor satisfaction levels** and
- **To identify development areas**

The research involved a **dual methodology** using both quantitative and qualitative research:

Quantitative Methodology

- **Quantitative** research measured usage and satisfaction levels at the Visitor Attractions and delivers a driver analysis of the components that maximise the visitor experience.
- Across 2016 and 2018:
  - Interviews conducted at **34 attractions** across Ireland
  - with **5,897 face to face interviews (predominantly overseas visitors)**

Qualitative Methodology

- **Qualitative** research supplemented the driver analysis in both years by providing a further layer of understanding on the components of a positive or negative visitor experience.
- In 2018:
  - **275 quantitative* interviews**

** A methodology that allows for a higher than usual quantity of qualitative interviews to allow for some quantitative analysis*

Research with Visitors to Attractions

Overall Evaluation

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Overall Evaluation

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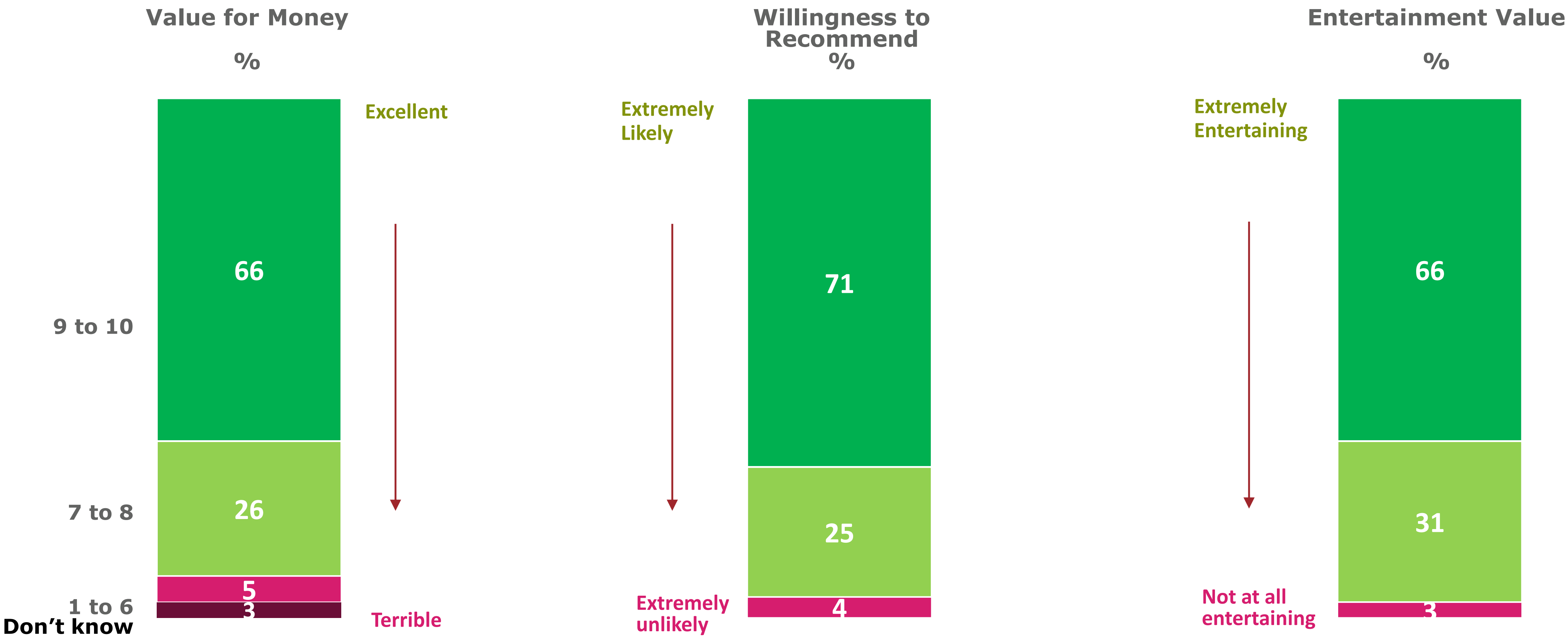
Base: 2018 Venues: All Visitors – 3,495



The overall evaluations of the visitor experience are consistently very positive: In 2018, 71% of visitors are extremely likely to recommend a visit to friends or family.

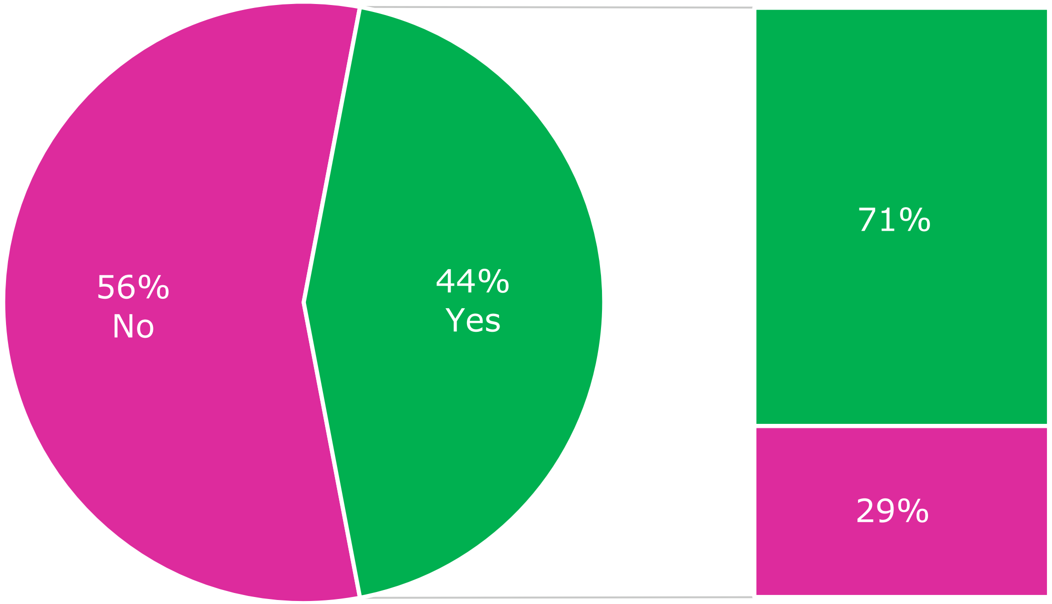
Offer and Take Up of Guided Tour

Base: 2018 Venues All Visitors – 3,495

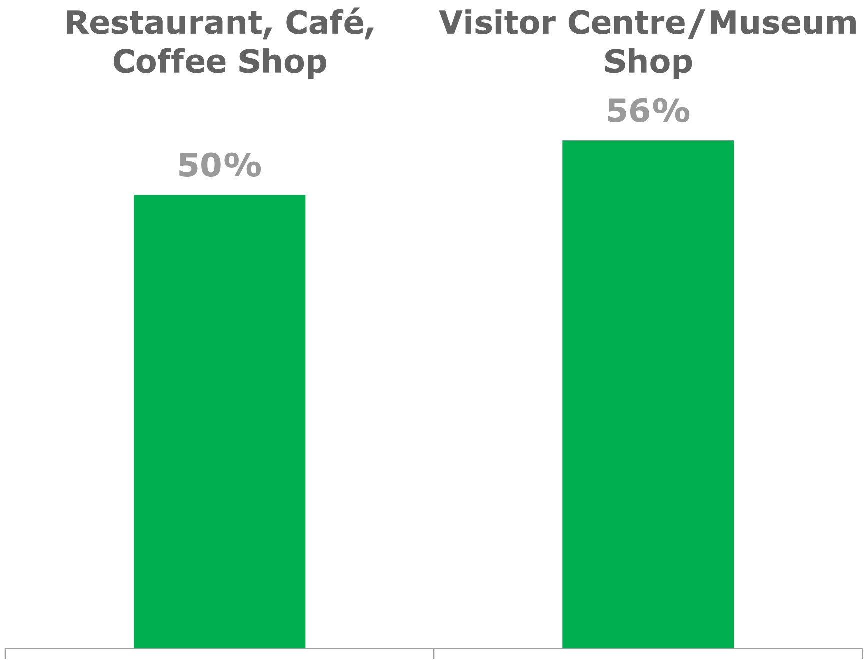
Base: In venues where available* (ROI and overseas visitors)

GUIDED TOUR OFFERED
(For Independent or Walk-in Visitors)

GUIDED TOUR TAKEN
(where available to independent or walk-in visitors)



Any Usage



8 of the 18 attractions surveyed in 2018, offered a guided tour to independent or walk-in visitors.

Where available to independent or walk in visitors, there is a high up-take of guided tours.

Usage of café less prominent in urban areas where more competition is evident

Usage of Interpretation Media

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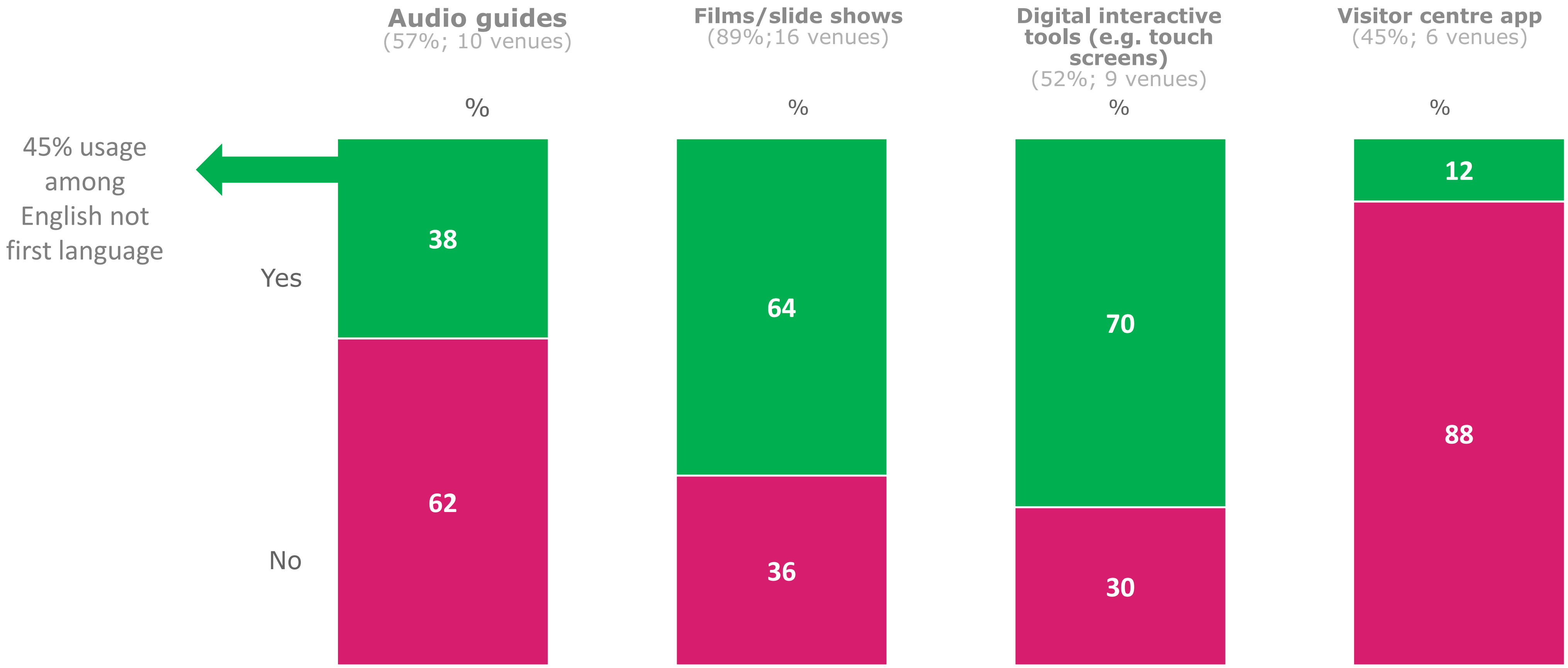
Base: In 2018 venues where available * (ROI and overseas visitors)



High use of films and digital interactive tools; only 45% of those with 'English not first language' used audio guides - could suggest fluent English, lack of prominence of service and/or limited supply of audio languages

** As per pre-survey audit*






Research with Visitors at Attractions

Drivers of Satisfaction

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Evaluation Criteria

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Categories

1 ***Storytelling***
2 ***Information Tools***
3 ***Presentation and Exhibits***
4 ***Tour With Official Guide***
5 ***Interior/Layout***
6 ***Access, Amenities & Staff***

Storytelling
The story presented being interesting
The length of time/duration of the tour
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 now feel you understand the story told at this attraction

Information Tools (filtered on usage)
Satisfaction with audio guides available
Satisfaction with digital interactive tools/ touch screens etc. available
Satisfaction with films/ slide shows available
Satisfaction with hands-on interactive tools available e.g things to touch/feel)
Satisfaction with apps for the attraction

Presentation and Exhibits
The quality of written explanations of the exhibits
The relevance of the exhibits to the story being told at the attraction
The order/flow of the exhibits presenting a clear story
The exhibits on display being well maintained and preserved

Tour With Official Guide (filtered on usage)
Tour Guide maintaining interest levels among customers of all ages during the tour
Tour Guide being passionate about the story being told
Tour Guide's ability to effectively answer any questions
Satisfaction with the tour overall

Interior/Layout
The attraction overall being clean, tidy and well maintained
The venue layout at start of the experience
The various sections being clearly signed and easy to locate
Length of time waiting or queuing during your visit (e.g. at ticket desk, visitor shop, restaurant or toilets)

Access, Amenities & Staff
Cost of entry to the attraction itself
The availability of staff members when required
The quality of the attraction Shop
Being greeted as you arrived at attraction in a friendly manner
The quality of the signposting to (attraction)
The quality of the restaurant/cafe/coffee shop in the attraction

Drivers of Satisfaction Analysis

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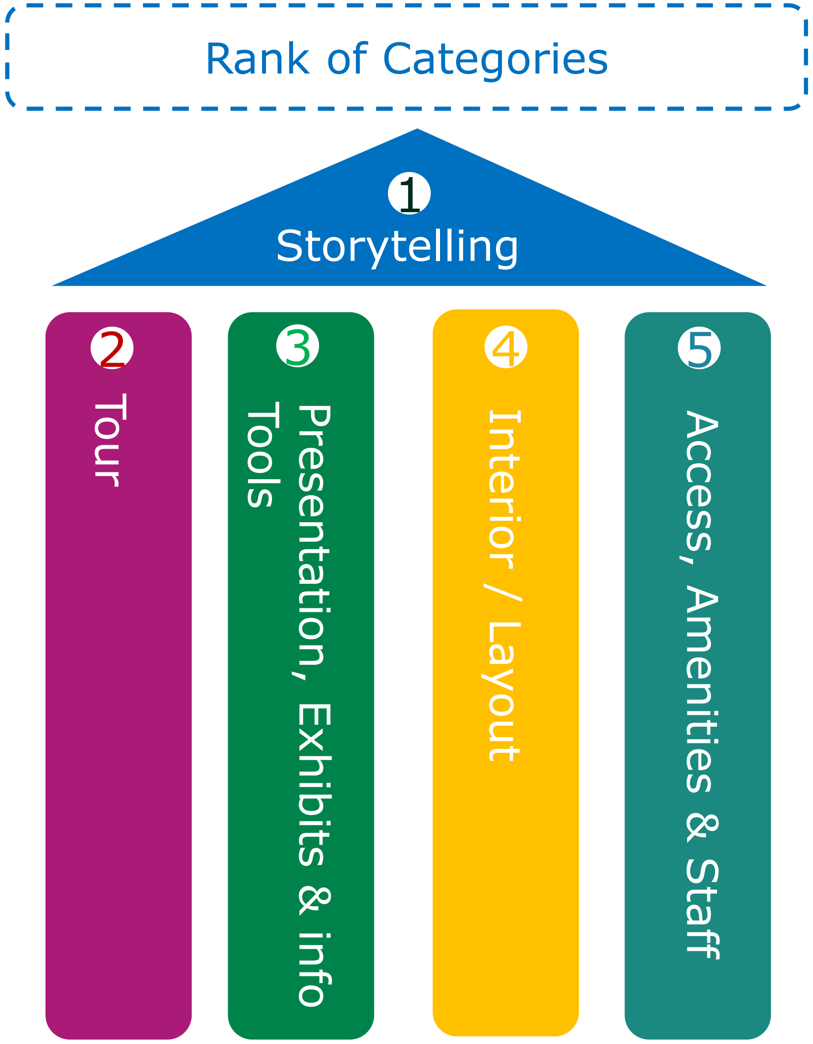
- 27 criteria (across 6 categories) relating to a visitor's experience were tested by nearly 6,000 visitors
- Each criteria was scored based on the visitor's experience at the attraction (minimum 1 hour spent at the attraction)
- Additional analysis was conducted to ascertain which criteria influence satisfaction the most
- This provided a ranking at both a category level and for the individual criteria



Top 10 Key Drivers of Satisfaction Mapped onto the Evaluation Criteria

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Key Drivers of Satisfaction

Key Driver	Storytelling
1	The story presented being interesting
	The length of time/duration of the tour
3	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
7	The extent to which you now feel you understand the story told at this attraction

Key Driver	Information Tools (filtered on usage)
10	Satisfaction with audio guides available
	Satisfaction with digital interactive tools/ touch screens etc. available
	Satisfaction with films/ slide shows available
	Satisfaction with hands-on interactive tools available e.g things to touch/feel)
	Satisfaction with apps for the attraction

Key Driver	Presentation and Exhibits
6	The quality of written explanations of the exhibits
	The relevance of the exhibits to the story being told at the attraction
	The order/flow of the exhibits presenting a clear story
4	The exhibits on display being well maintained and preserved

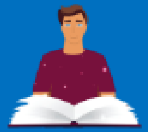
Key Driver	Tour With Official Guide (filtered on usage)
8	Tour Guide maintaining interest levels among customers of all ages during the tour
5	Tour Guide being passionate about the story being told
9	Tour Guide's ability to effectively answer any questions
2	Satisfaction with the tour overall

Key Driver	Interior/Layout
	The attraction overall being clean, tidy and well maintained
	The venue layout at start of the experience
	The various sections being clearly signed and easy to locate
	Length of time waiting or queuing during your visit (e.g. at ticket desk, visitor shop, restaurant or toilets)

Key Driver	Access, Amenities & Staff
	Cost of entry to the attraction itself
	The availability of staff members when required
	The quality of the attraction Shop
	Being greeted as you arrived at attraction in a friendly manner
	The quality of the signposting to (attraction)
	The quality of the restaurant/cafe/coffee shop in the attraction

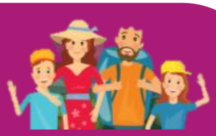
Key Findings: Visitor Attraction Research

1. Storytelling



It is critical that the story being told is interesting, unique & memorable. Historical and cultural information is best relayed in a story format. While strong key & supporting characters all play their part in making the story come alive

2. Tours



Entertaining tours & passionate tour guides are key drivers of a highly satisfied visitor experience. Memorably recalled moments often included unusual story vignettes around people (heroes & villains), rituals & events.

3. Presentation, Exhibits & Info Tools

Diversity of media & exhibits (that are story appropriate) appeals to visitors. Story structure is also key – layer information for all appetites with access to optional info for those interested

4. 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.

5. Access, Amenities & Staff

There are some reservations that relate to the cost and/or the number of times visitors were separately required to pay for access and services. If a visitor feels like they have had a world class experience, they are less price sensitive, as it’s all about the value they perceive

Storytelling makes all the difference

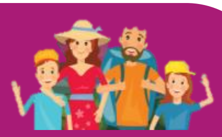
1. Storytelling

It is critical that the story being told is interesting, unique & memorable. Historical and cultural information is best relayed in a story format. While strong key & supporting characters all play their part in making the story come alive

- Ultimately the uniqueness of the story & how interesting it is to the visitor is at the heart of the success of any attraction
- Historical & cultural information are best relayed via storytelling
- The plot, character & sense of place/settling all play their part
- Dramatic plots & **plot** full of conflict appeal. Don’t shy away from darker stories
- Strong central & supporting **characters** stand out – heroes & villains appeal
- Can the **location**, view and/or setting add a layer to the story?
- Story must appeal to visitor at **intellectual, emotional and physical** level (engage the senses)

Tours

2. Tours



Entertaining tours & passionate tour guides are key drivers of a highly satisfied visitor experience. Memorably recalled moments often included unusual story vignettes around people (heroes & villains), rituals & events.

- Great tours are a key driver of satisfaction
- **Consistent delivery** of the tour is important
- Tours must be **fun as well as informative**
- **Retell-able stories** resonate with visitors
- **Humour and distinctive 'nuggets'** contained with the tour delivery are especially memorable
- Stories should build on what is widely available

Presentations, Exhibits & Information Tools

3. Presentation, Exhibits & Info Tools

Diversity of media & exhibits (that are story appropriate) appeals to visitors. Story structure is also key – layer information for all appetites with access to optional info for those interested

- **Story structure** is important
- Layer **information for all appetites**, from those that want the headlines to others who want the full detail
- **Flow and orientation are key** – visitors don't want to feel like they're *'doing it wrong'*
- Diversity of the **range of media** and exhibits (*that are appropriate to the story)* provide a more creative and memorable experience for visitors
- Digital interpretation, to be valued, must add to the story (**digital is no longer novel**)
- **Props and physical exhibits** are generally positively received. Visitors enjoy tactile interaction and 3D models ad add greatly to understanding

Interior & Layouts

4. 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.

- The layout needs to facilitate the story structure – intuitive **beginning, middle & end**
- Confusing exterior layout or unclear direction at the start can negatively impact visitor's experience from the outset
- While visitors value a sense of freedom (*especially those that choose to self-guide*) they also **want to consume the story in the way it was intended**
- Clear signage is valued, it allows visitors to orientate themselves and feel in control of their experience

Access, Amenities & Staff

5. Access, Amenities & Staff

There are some reservations that relate to the cost and/or the number of times visitors were separately required to pay for access and services. If a visitor feels like they have had a world class experience, they are less price sensitive, as it’s all about the value they perceive

- Access, amenities & staff feed into general satisfaction. These however are more hygiene factors than areas to provide competitive advantage
- Good **value is important**, it's not just about the price point. Perception of value is important
- Visitors have an **aversion to perceived hidden costs** or multiple price points
- Communicate all elements of the experience included in the price
- Usage of **café less prominent in more urban areas** where more competition is evident. Importance of the café increases for more rural attractions

Research with Visitors at Attractions

Marketing Insights

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Day Trip or Staying in Area

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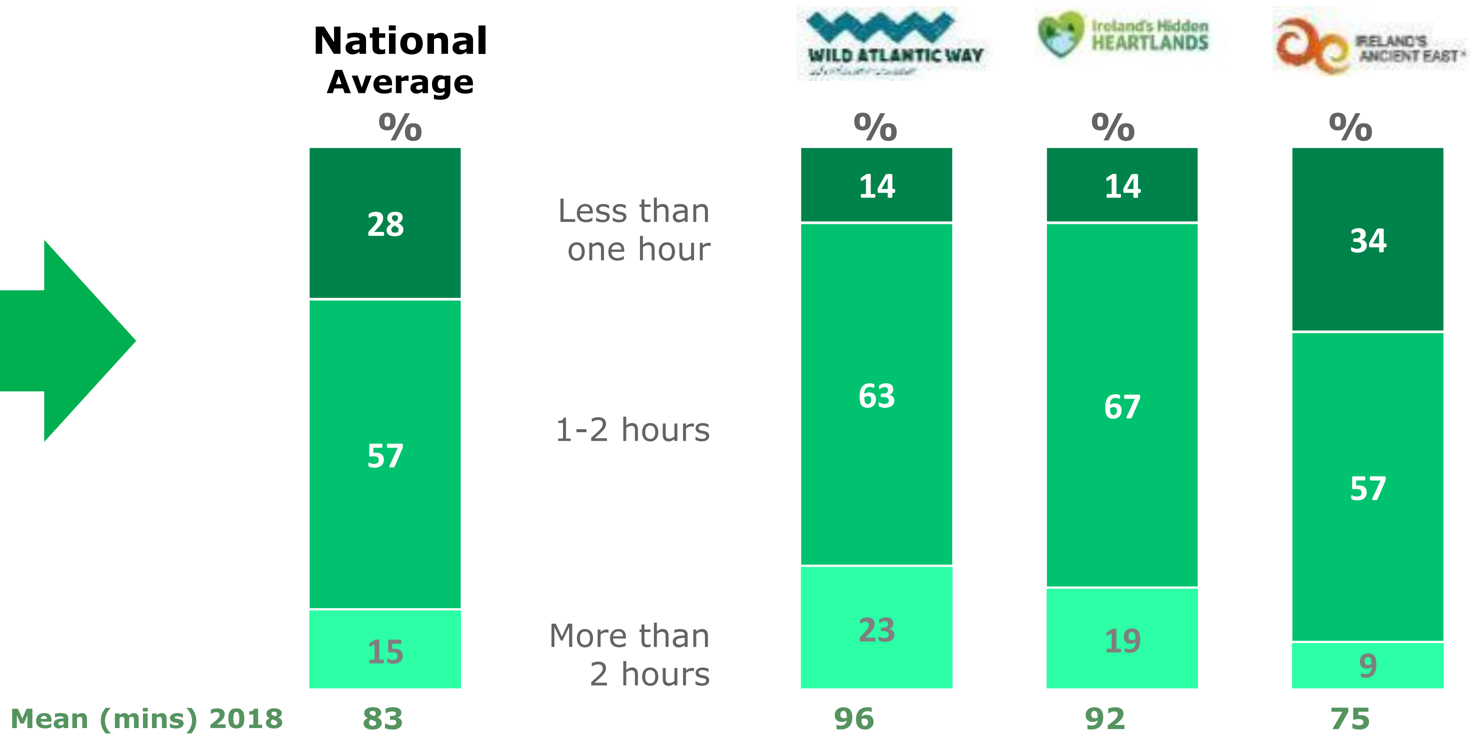
Base: Overseas Visitors combined – 4,511

- On average **one in two visitors** to all attractions outside of Dublin have been on a day trip, the other half staying in the area
- Nine in ten visitors to Dublin attractions were staying in the Dublin area

Day trippers: Time taken to travel to Visitor Attraction

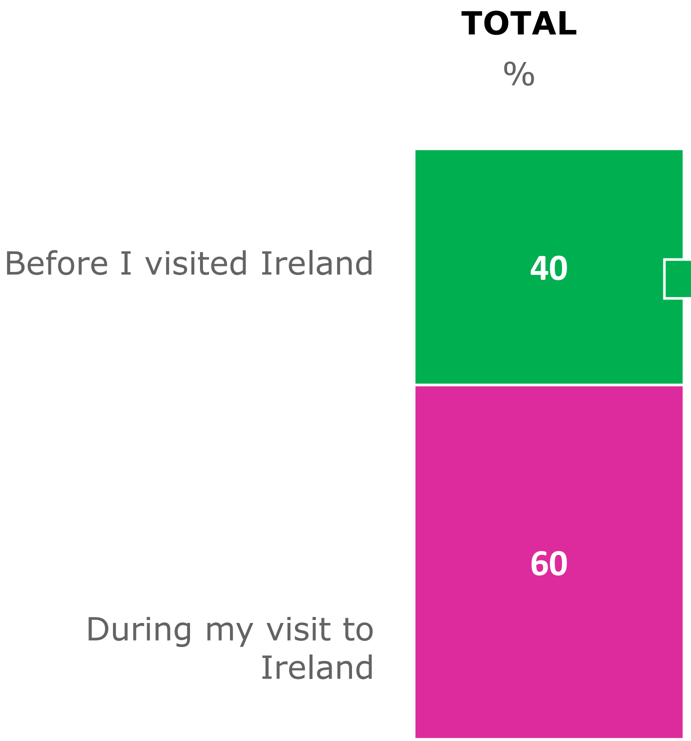


Whether domestic or overseas day trippers, visitors travel time to the attraction is over an hour (83 minutes).
Remember however that the location of many regional attractions necessitate some degree of travel.

Q.6b Are you on a day trip or staying in the area?

When did Overseas Visitors First Hear of Attraction

Base: Overseas Visitors – 2,490

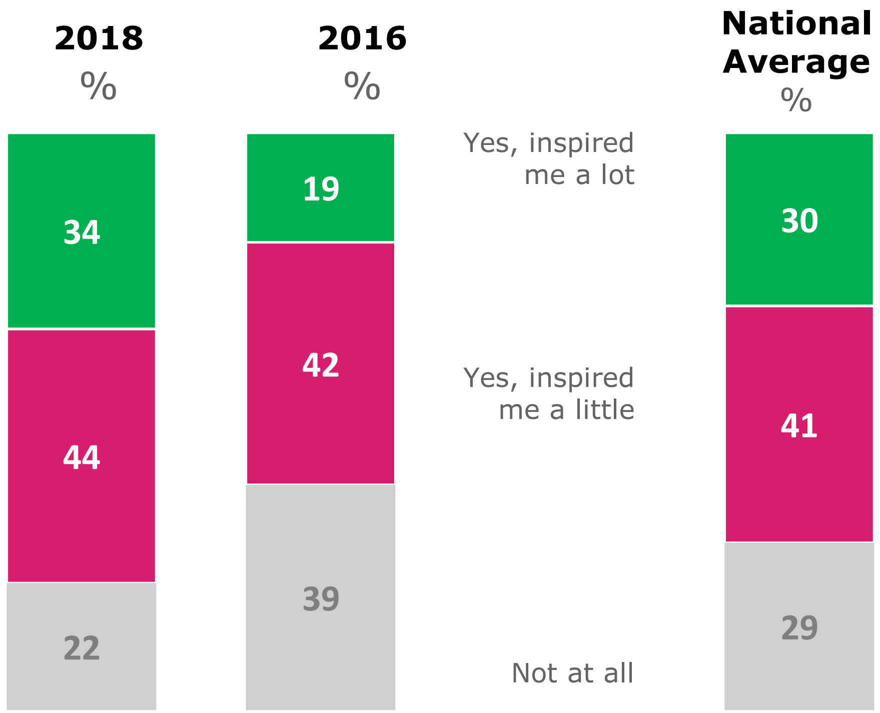


When did you actually make a plan to visit? (n=1,001)

32% of overseas visitors made the decision to visit before they arrived in Ireland

Cross Promotion/Inspiration

Base: All Visitors combined – 5,897



The majority of attractions were unknown to the overseas visitor before they arrived in Ireland. This highlights the importance of in–destination promotion by attractions, working with other attractions, local accommodation providers, Tourist Information Centres and businesses etc to ensure they are promoting their attraction when given the opportunity.

Q.8a When did you first hear of ……. ?
Q.8b And when did you actually make a plan to visit………..?

Q.19 Did your visit inspire you to visit any other cultural and heritage attraction

Information Sources : Overseas Visitors

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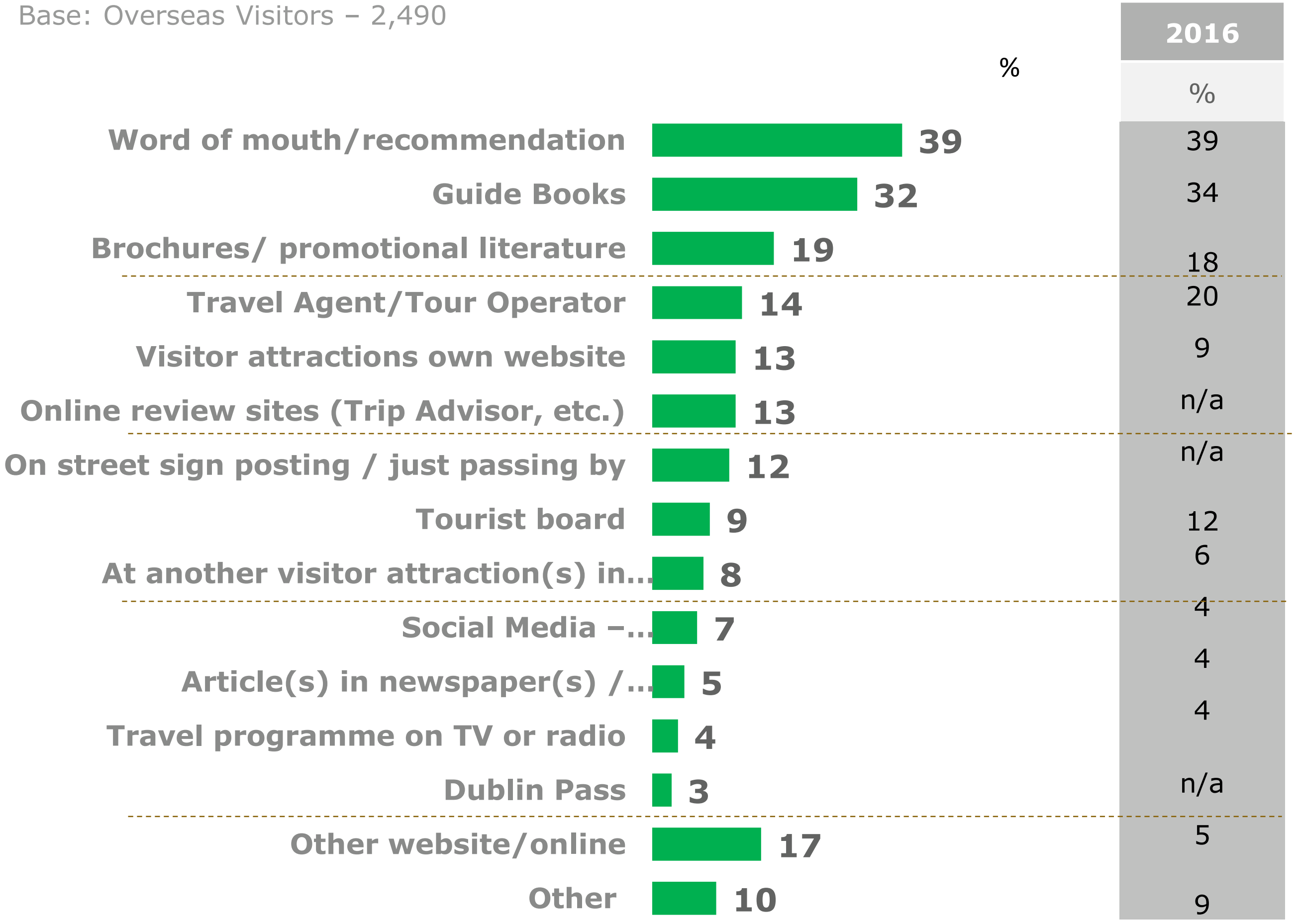
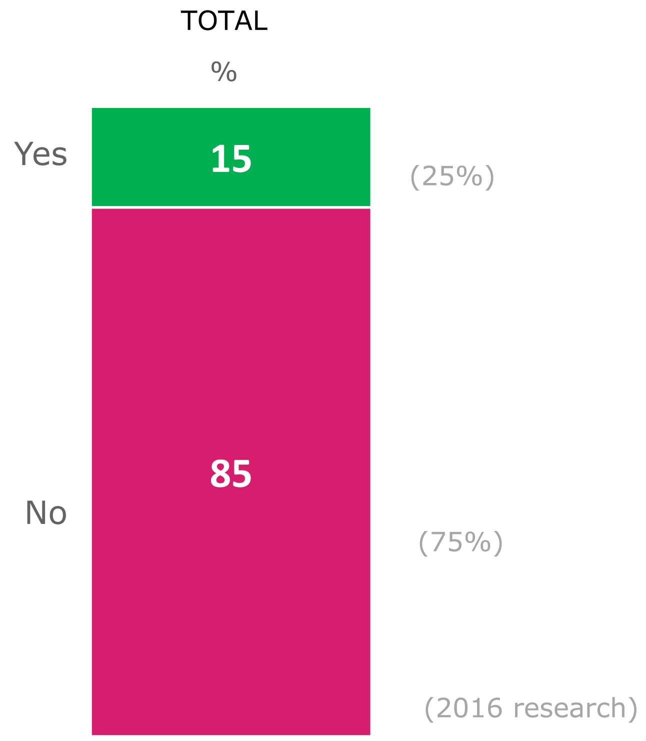
Base: Overseas Visitors – 2,490



Did Overseas Visitors Pre-Book Visit?



As in 2016, traditional information sources are especially prominent as key information sources for attractions

Pre-Booking of visits to attractions are relatively modest. This however correlates with other Path-to-Purchase Research, where many visitors choose not to book activities and attractions in advance.

Q.10 Where did you first hear about ……. (this place) ANY MENTION

Influence of Attractions to Visit.....

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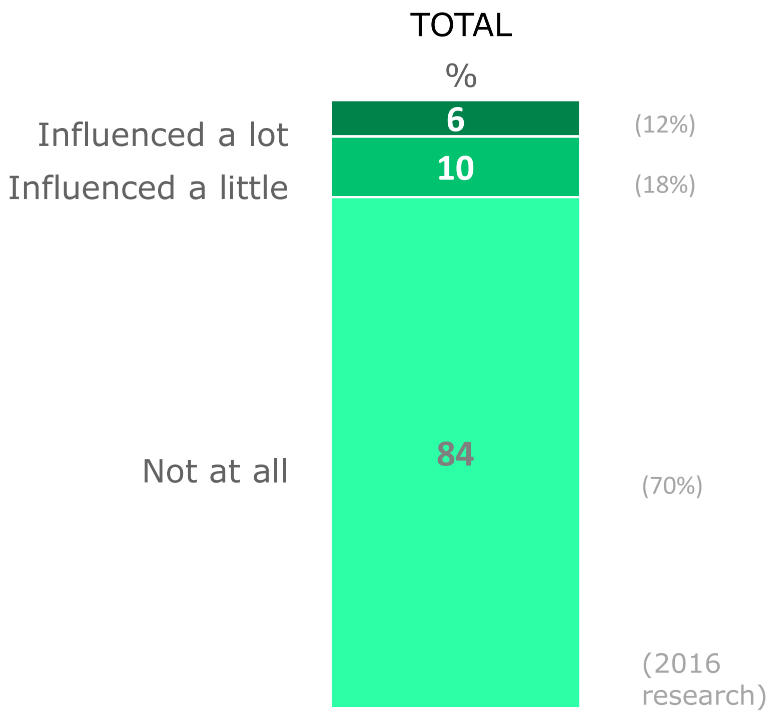
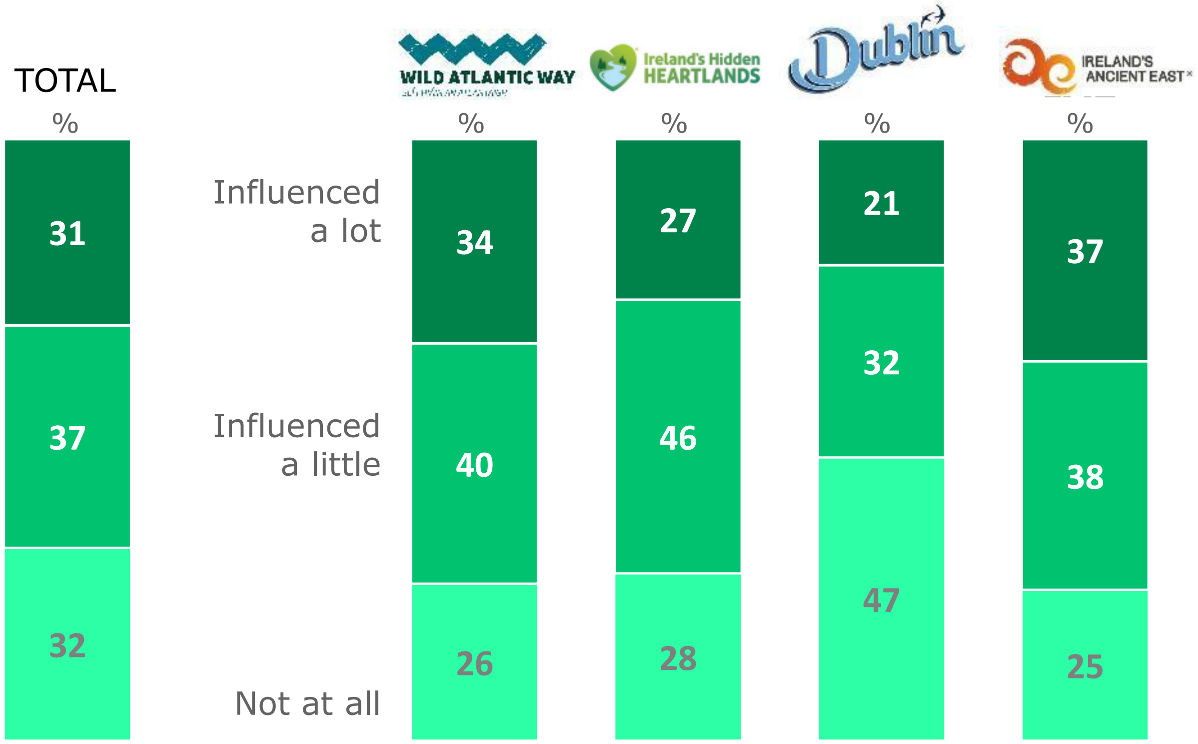
Base: Overseas Visitors – 2,490

Visit Ireland



Visit Region in Ireland

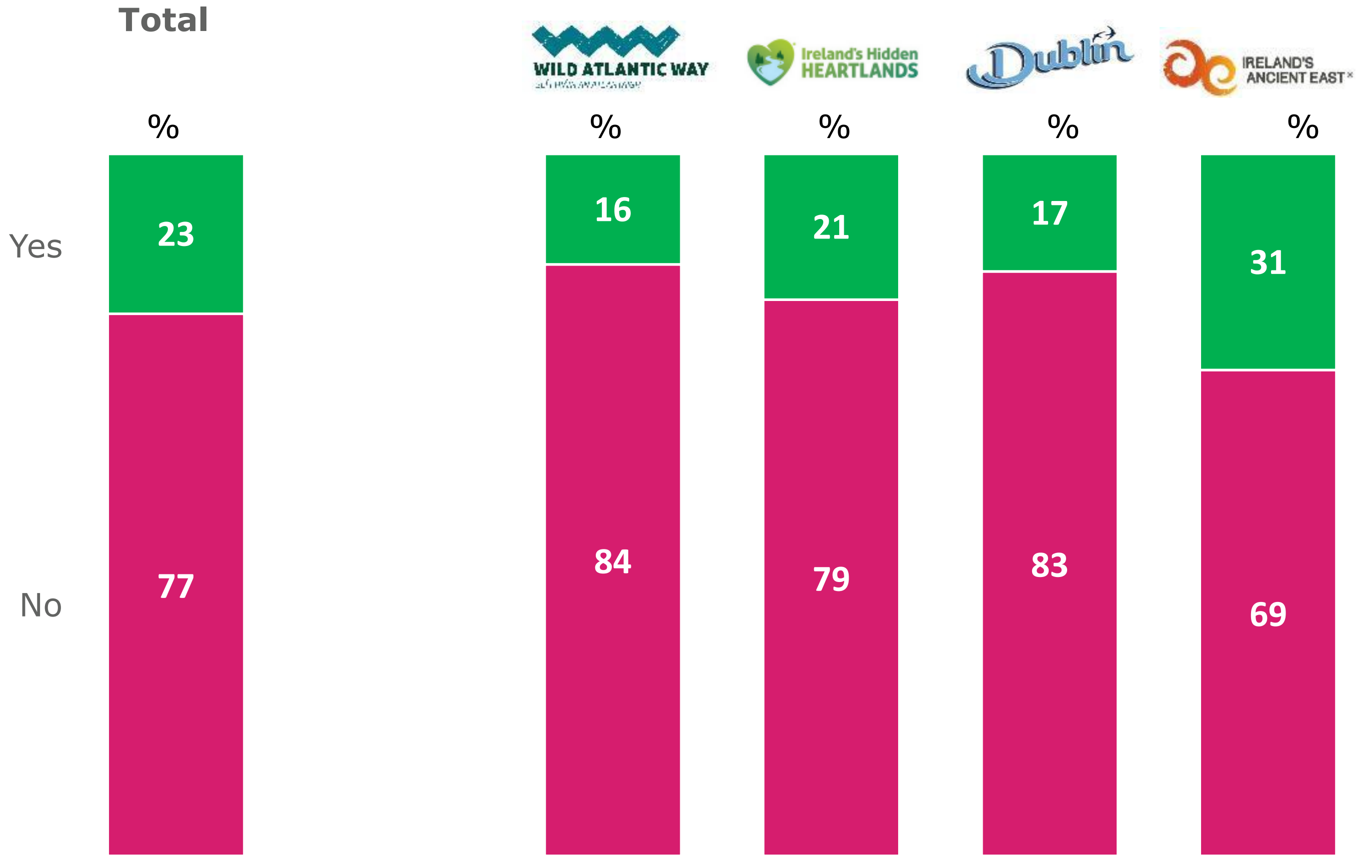


Individual visitor attractions in the main do not provide compelling singular reasons to visit Ireland. However an attractions influence is much more prominent in influencing travel to regional areas

Q.9a To what extent did influence your decision to visit Ireland?

Visitor Feedback - Were Visitors asked for Feedback on Experience

Base: All Visitors – 3,495



23% of all visitors were asked for feedback by the attraction on their experience (outside of interviewer for this research)
Requests peak at venues in IAE.

Q.20 Did (ATTRACTION) ask you for direct feedback on the attraction after your experience?