ASVA

Scottish Visitor Attraction Benchmarking Report

Report 2023

Shanksresearch.co.uk
claire@shanksresearch.co.uk

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Background & Commentary from ASVA

Welcome to the inaugural Scottish Visitor Attractions Benchmarking Report, commissioned by the Association of Scottish Visitor Attractions (ASVA).

ASVA is the representative body for the visitor attractions sector in Scotland. ASVA represents, connects, supports and inspires the attractions sector, lobbying and advocating to ensure that the industry's voice is heard. It also provides advice, information, statistics, networking and training to help drive forward quality within the industry and support its members in their aspirations.

In 2022 ASVA launched its new strategy, outlining how the organisation will deliver on its mission to 'support its members by sharing expertise, removing barriers, creating opportunities, and encouraging innovation within the Scottish visitor attraction sector'. Over the last two years, since the launch of the strategy, ASVA has been moving forward positively, growing both its membership base and influence across the Scottish tourism industry. As a result, the organisation is in a very strong position to better inform its members and is able to support and advocate for the sector better than ever before.

In the first half of 2023, ASVA undertook a large scale and highly significant piece of research with its members to establish benchmarks and KPIs pertaining to all aspects of operating and measuring success at visitor attractions in Scotland. This was the most comprehensive data gathering exercise undertaken in ASVA's history, covering a wide range of topics including performance, structure, staffing, visitors, finances, pricing, facilities offered and more.

The results from this research are presented in this report, which has been published exclusively for ASVA members and key strategic partners. Insights have been collected from just shy of 400 individual attractions and organisation is grateful to the more than 50% of its membership that participated in this significant piece of research. This study will further cement ASVA's position as the voice of authority on all matters relating to the Scottish visitor attractions sector and will enhance the organisation's influence yet further, with insights from the study used by ASVA to help shape and influence future policy decisions taken at a Scottish and UK Governmental level.

And it must be noted that this is just year one. In its strategy, ASVA is committed to building upon this work in years to come to ensure that the organisation and its members continue to benefit from an unparalleled level of insights to help inform decision making going forward.

Methodology & Key Findings

Survey Methodology

The ASVA Attractions survey was hosted online, and a link was emailed to all participating Attraction organisations within ASVA. Feedback was received from 112 organisations, comprising 389 attractions.

38

Full Time Equivalent (FTE) Staff per organisation

Increased Footfall

Was the main criteria of success for organisations
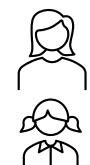
£12.78
£5.56

The price for tickets on average

74%

% of visitors from within the UK

(Scotland 48%, Rest of UK 26%)

Loss of £79k

Attraction's average Net Gain / Loss during 2022

Organisation & Attraction Statistics

Types of Organisations

85% of the attractions surveyed were paid attractions, and most were organised as a charity or charitable trust. More than two thirds of attractions were open all year.

Type of Attraction

Free
15%

Paid
85%
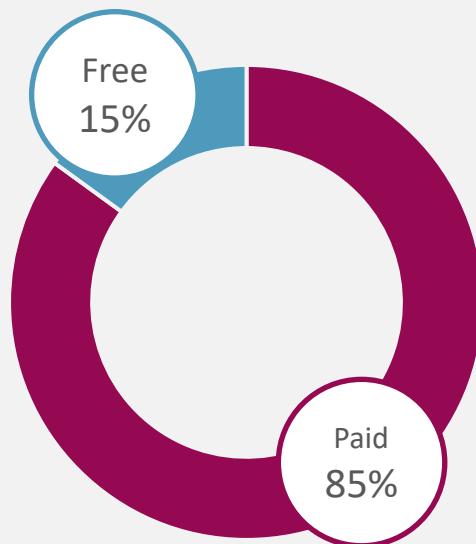
	Free
Largest attractions (100k+ visitors)	**28%**
Smallest attractions (0 - 4,999)	**7%**

Type of Organisation

Charity/Charitable Trust	70%
Public Body (e.g. local or central government)	36%
Limited Company	18%
Other	1%
Sole Trader	1%
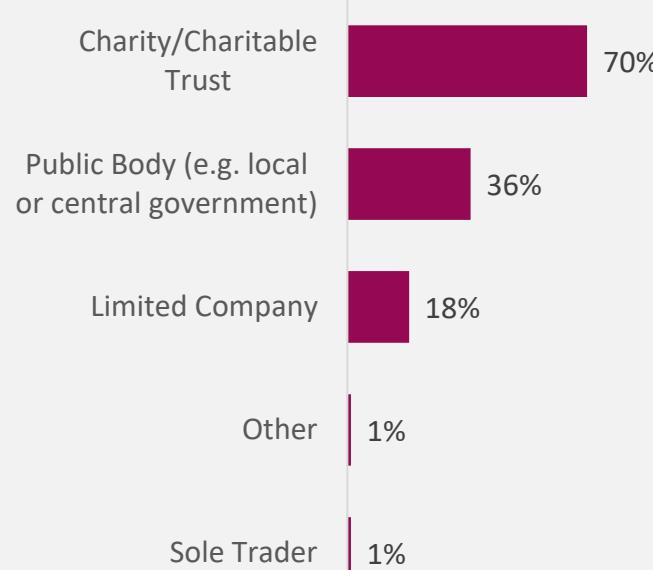
Seasonal Attractions

Seasonal
30%

All year
70%
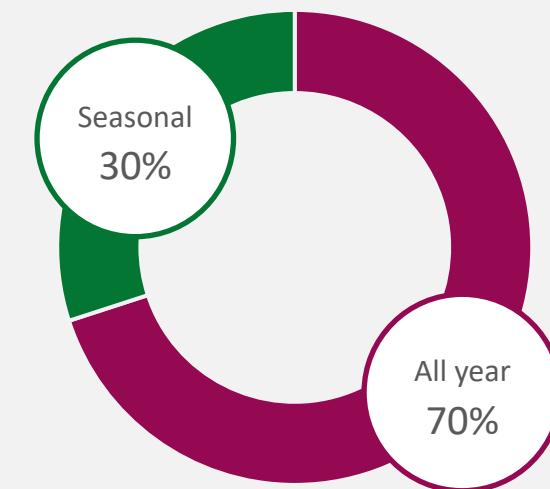
Seasonal Dates

17/03   18/10   Mean: **216 days**

7 months, 4 days

Sources of Funding

Funding comes mainly from ticket revenue, with more than a third of revenue coming from this source. Remining funding comes from retail – particularly key for distilleries.

% of attractions which use funding

Source	%
Ticket revenue	83%
Retail revenue	95%
External funding	65%
Memberships	65%
Catering revenue	86%
Other	52%
Events revenue	90%
Large donations	56%
Donations at the attraction	68%
Pay parking	61%

% of funding

%
32%
19%
13%
10%
7%
6%
5%
4%
4%
0%

Retail revenue is key for **distilleries** and **sports centres**

53% Distilleries and Breweries

43% Sports & Leisure Centres

63% **Free attractions** are funded mainly from **external sources**

Investment during 2022

In 2022, attractions mainly invested in maintenance and upkeep, into the development of new facilities, and into marketing and promotion. These were common across all types of attraction.

% of attractions that are investing

Category	Percentage
Maintenance	98%
Development of new facilities & infrastructure	68%
Marketing & promotion	93%
Staff Development & Training	94%
Leadership development	83%
Other	33%

% of investment

Category	Percentage
Maintenance	41%
Development of new facilities & infrastructure	22%
Marketing & promotion	22%
Staff Development & Training	10%
Leadership development	5%
Other	1%

The main **other** investment type is **conservation efforts**

New Innovations

There were 10 main types of new innovations being developed by attractions, ranging from new booking systems, to community initiatives and inclusive access developments.

Booking Systems and Ticketing Innovations
*"We moved to **booking only** within the distillery experience - all visits must be **pre-booked online**"*

Community Engagement Initiatives
*"**New community engagement programme**: New regular groups meeting - Ceilidh Nights, Book Group and Writing Group"*

Technology Upgrades
*"New ticketing system implemented - supported change to primarily **online in advance ticket sales**."*

Product and Exhibit Enhancements
*"New **shop products**, New **tour guides**, New **interactive displays**, New **exhibitions and cases**, Concert program, New activities and events."*

Sustainability and Green Initiatives
*"Air source **heat pumps**"*

Dynamic Pricing Strategies
*"New services including new website will support our ability to offer **dynamic pricing** etc."*

Community Support and Wellbeing
*"Employee support programme, **free toddler groups, after school groups**, additional tours"*

Partnerships and Joint Packages
*"Joint **luxury packages with other local businesses**, Retail packages, membership for whisky"*

Staff and Skills Development
*"Simplified processes, new time and attendance system to **support paying people correctly** and having the **right people in the right place at the right time**, new initiatives to combat dying skills."*

Innovative Interpretation and Inclusive Access
*"Innovative ways of interpreting the collections to ensure they are **inclusive and accessible** – e.g., through use of digital, **interactive objects, tactile labels**, etc."*

Awards

The most common awards held by attractions were the Visit Scotland Quality Assurance award, followed by the Green Tourism Award.

Attraction Awards

Award	Percentage
Visit Scotland Quality Assurance	88%
Green Tourism	55%
TripAdvisor Travellers' Choice	26%
Taste Our Best	13%
Other awards	9%
Thistle Award	3%
No awards	7%

Scottish Tourist Board Visitor Attraction:
- Five star: 24%
- Four star: 63%
- Three star: 14%

Green Tourism:
- Gold Award: 63%
- Silver Award: 34%
- Bronze Award: 3%
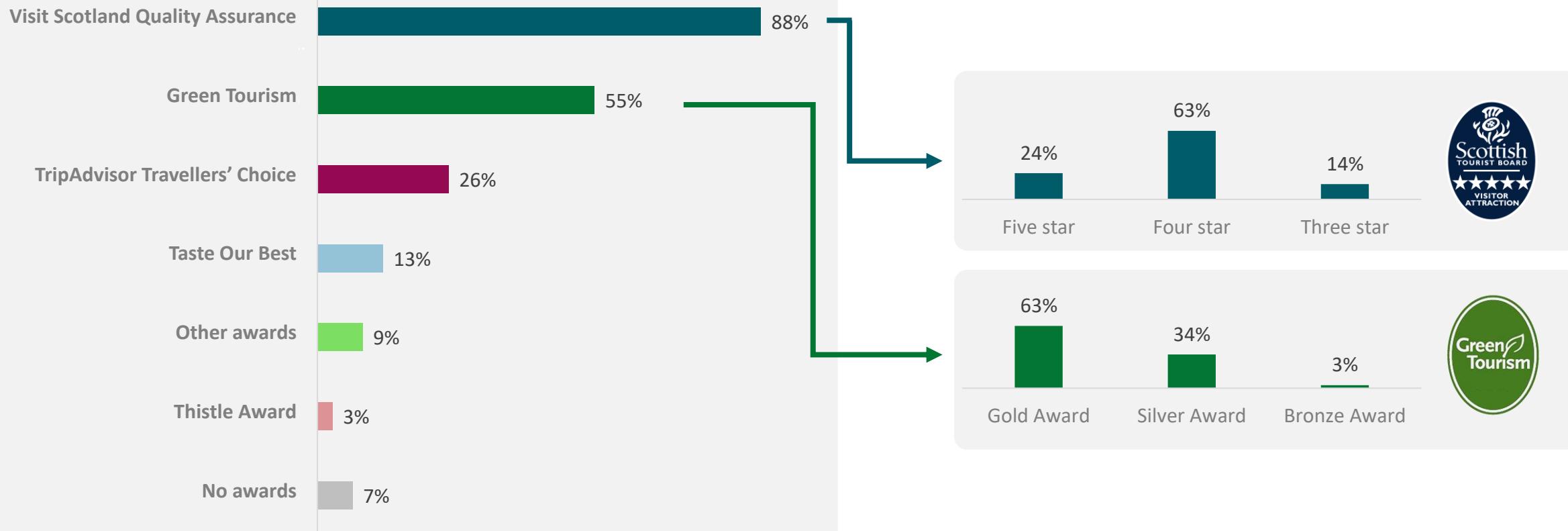
Measuring Success

Organisations tend to measure success through increases in footfall and revenue. Visitor Satisfactions scores take third place in drivers for success.

Criteria for Success - Ranked

	Mean Score	1st	2nd	3rd	4th	5th	6th	7th
Increased Footfall	2.53							
Increased Revenue	2.73							
Visitor Satisfaction scores	3.03							
Staff wellbeing and retention	3.55							
Quality Assurance scores	4.46							
Increased Membership	5.30							
Carbon Footprint Reduction	5.72							

Most important → Least important

Marketing

Almost every single attraction utilised a website and social media. Only a fifth have expanded into using TikTok, but Facebook, Instagram and X (formerly twitter) were common.

Marketing Sources

Source	Percentage
Website	99%
Social Media	99%
Leaflets / brochures	91%
VisitScotland	88%
Posters/billboards	87%
Print media	84%
Local tourism group(s)	72%
TripAdvisor	59%
Guidebooks (online or in print)	59%
Travel Trade	50%
Sector group/association	46%
Online Travel Agency	6%

Social Media Sites used

| Site	Percentage
Facebook	100%
Instagram	94%
X	90%
LinkedIn	25%
TikTok	22%
Other	1%
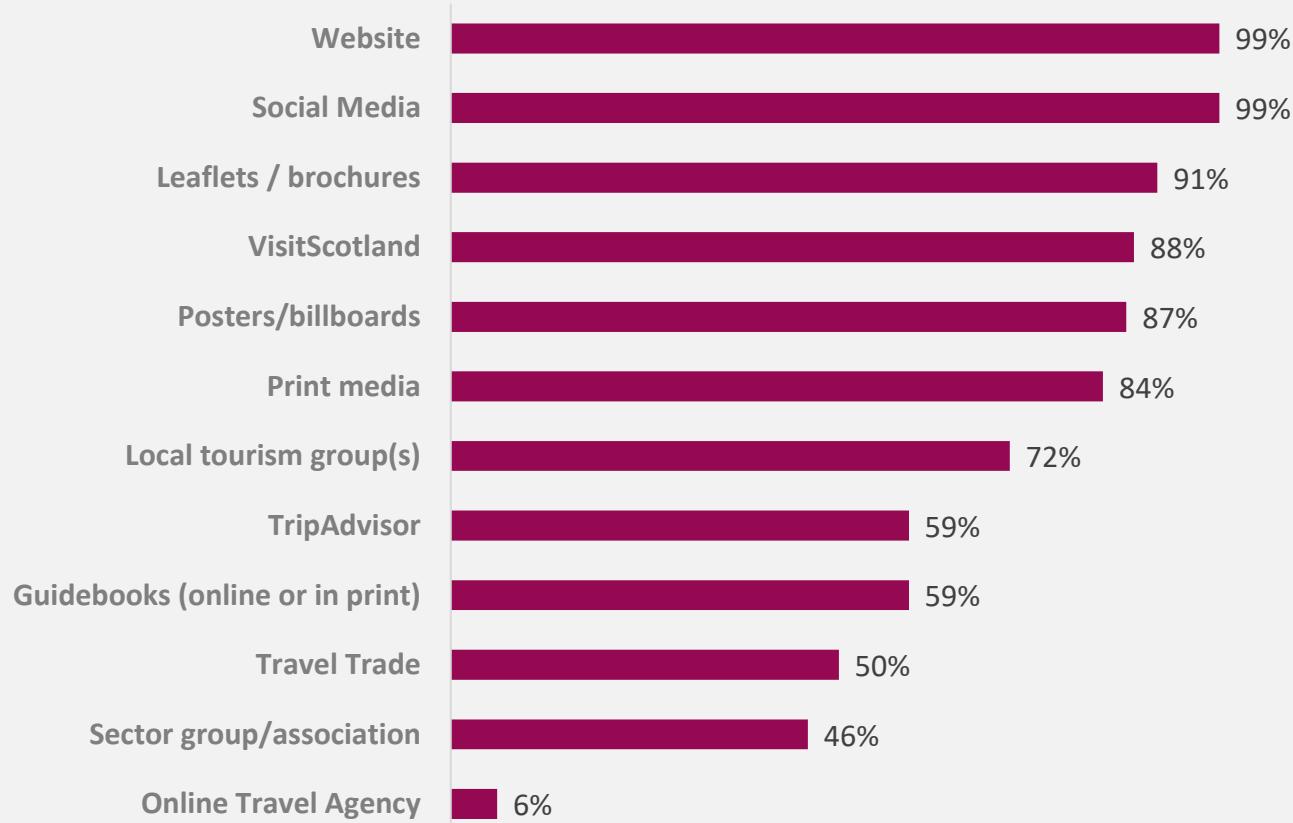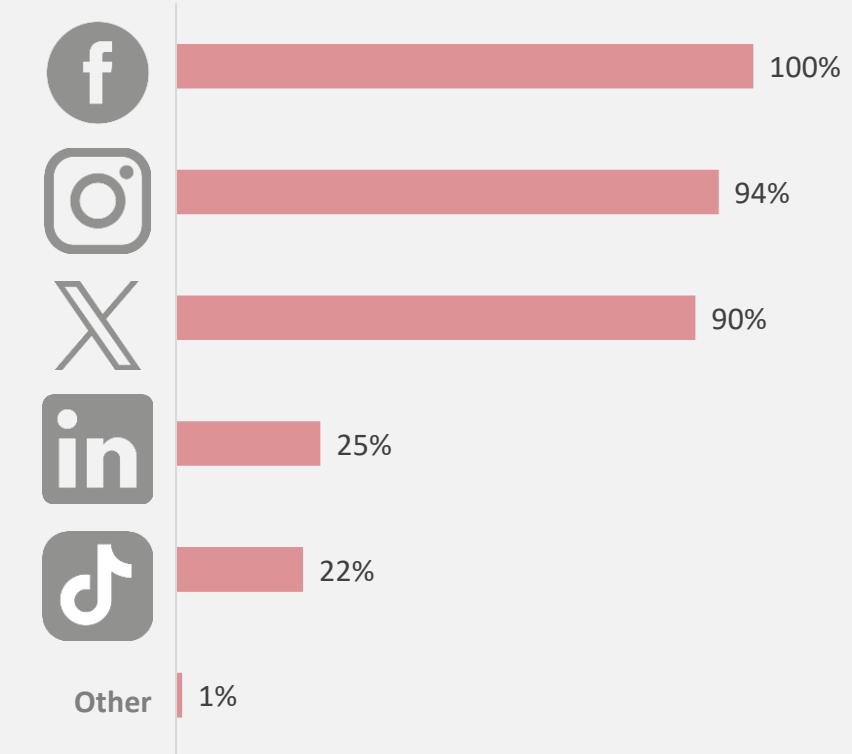
Ticketing

Half of tickets are still purchased as walk-up tickets. Adult ticket prices averaged around £13, while a child ticket cost £5.50. More than half had set prices, but some attractions are now branching out into variable pricing models.

Types of Tickets

Walk-up: 52%

Pre-book: 48%
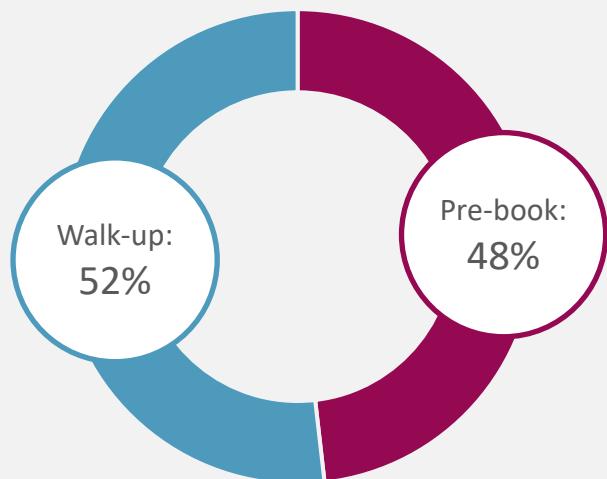
% Booked through an **OTA** (ticketed attractions) | **6.7%**

## Ticket Prices

Adult Tickets **£12.78**

Child Tickets **£5.56**

Most Expensive Adult Tickets:

Boat, Bus Trips & Railways **£32.83**

Distilleries and Breweries **£26.00**

Pricing Models

Dynamic Pricing 5%
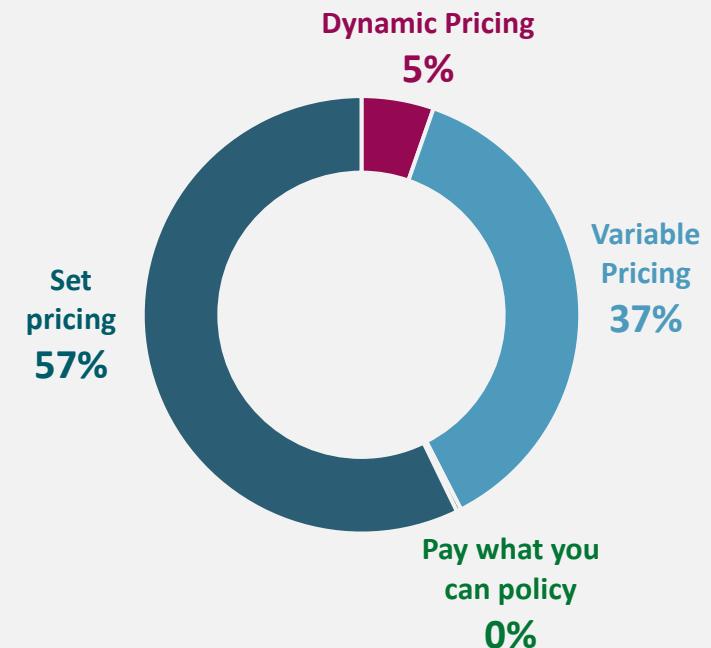
Variable Pricing 37%

Set pricing 57%

Pay what you can policy 0%

Donations

Donations were accepted by many attractions, most commonly by churches, nature reserves, castles and historic sites. Ticketed attractions received on average £4 per visitor, while non ticketed ones averaged £1.20 per visitor.

Donations Accepted

No 29%

Yes 71%
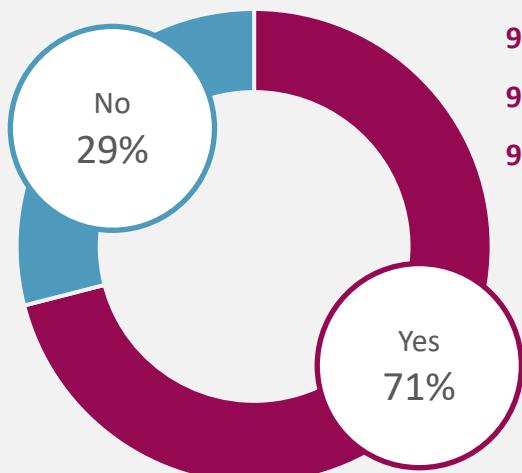
Most likely to **accept donations**:

100%	**Churches, Abbeys & Cathedrals**
98%	**Nature Reserves**
98%	**Castles**
96%	**Historic Sites & Monuments**

Contactless Donations

Contactless Donations **91%**

Donation Amounts

	Suggested Donation
Ticketed Attractions	**£4.43**
Non-Ticketed Attractions	**£4.00**

	Actual Donation
Ticketed Attractions	**£3.96**
Non-Ticketed Attractions	**£1.20**

Employees

Organisations have 53 paid employees and an additional 41 volunteers on average. 33 are full time employees, and 23 are part time employees, which equates to 38 FTE.

| Type	Staff Per Organisation
Full-time employees	33
Part-time employees	23
Unpaid Volunteers	41
Total Paid and Unpaid Staff	**96**
Management employees	8
Support staff	7
Frontline employees	37
Total Paid Staff *	**53**
Full Time Equivalent (FTE)	**38**

*Paid Staff figures doesn't match the sum of the top two rows here due to slightly different sample sizes.

Employee Demographics

Employees tend to skew younger than the overall population, with a high proportion of 45-54-year-olds. There is a much higher proportion of female than male employees.

Age of Employees

Under 25	25-34	35-44	45-54	55-64	65-75	75+
19%	19%	18%	22%	17%	4%	1%

Gender of Employees

Male 40%

Female 59%

Non-Binary 0.5%
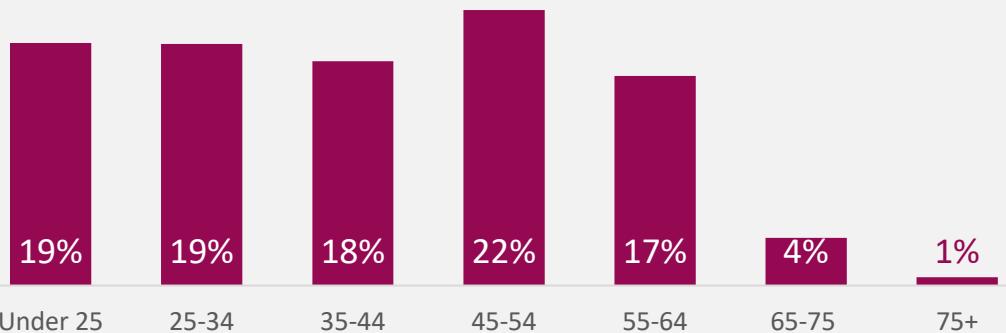
Other characteristics

Employees with a disability — 2.56%
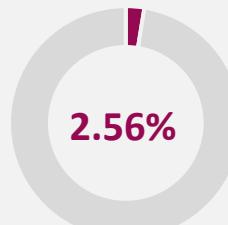
Employees who are unpaid carers — 3.19%
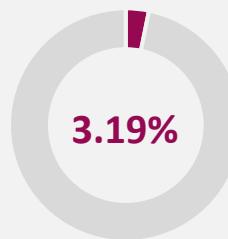
Employees from a minority background — 2.18%
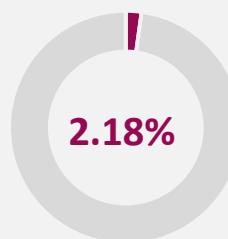
Salaries & Payroll

On average, payroll per employee works out at £32k for management employees, while frontline employees earn just under £15k. 99% of attractions offer living wage salaries.

Payroll per Employee Calculations		Per Organisation
No. of Staff *	Management employees	11.63
	Support staff	3.00
	Frontline employees	27.13
Total Payroll	Management employees	£368,795.04
	Support staff	£83,832.54
	Frontline employees	£403,922.13
Payroll per employee	Management employees	£31,710.67
	Support staff	£27,944.18
	Frontline employees	£14,888.39 **

*Numbers here differ slightly from earlier as like-for-like sample is used in the calculations
** Please note that this figure considers both full time and part time staff members.

Living Wage Attractions

Yes – Real living wage 46%

Yes – National living wage 53%

No 1%
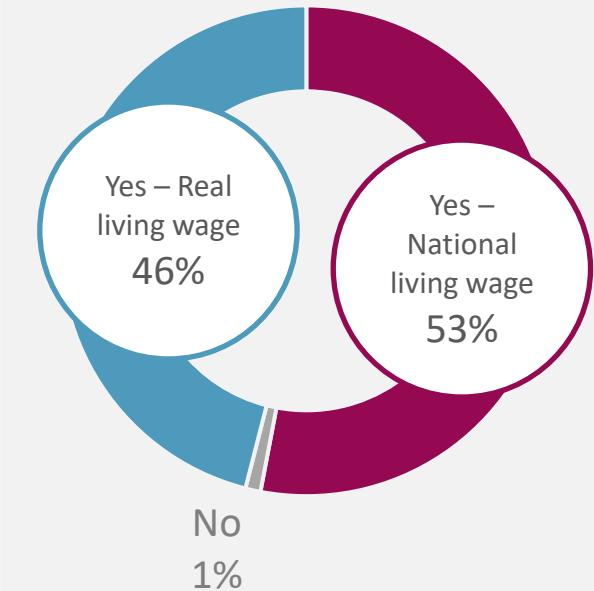
Employee Benefits

Organisations most commonly offer flexible hours as a benefit to their employees, followed by wellbeing initiatives and Employee assistance programmes. Only a small number offer extra holidays, memberships, bonus schemes and medical coverage.

Benefit	Percentage
Flexible hours	92%
Initiatives to support wellbeing	83%
Employee assistance programme	74%
Continual Professional Development programmes	44%
Incentive scheme/vouchers	33%
Extra holidays	29%
Memberships (to clubs, gyms etc)	16%
Bonus scheme	10%
Medical/Dental cover	8%
Other	17%

Larger attractions tend to be able to offer extra holidays more commonly.

47%

Absences and Turnover

Absences total roughly 104 days in 2022. This mainly comes from paid absences, which account for 67 of those days. Staff turnover reported in 2022 came out to nearly 20%

Type	Hours Per Organisation (and equivalent 8-hour days)
Paid hours from FT staff:	337.57 (42 days)
Paid hours from PT staff:	198.57 (25 days)
Total Paid	536.14 (67 days)
Unpaid hours from FT staff:	114.67 (14 days)
Unpaid hours from PT staff:	181.48 (23 days)
Total Unpaid	296.15 (37 days)
Total	832.29 (104 days)

Staff Turnover in 2022

19.95%
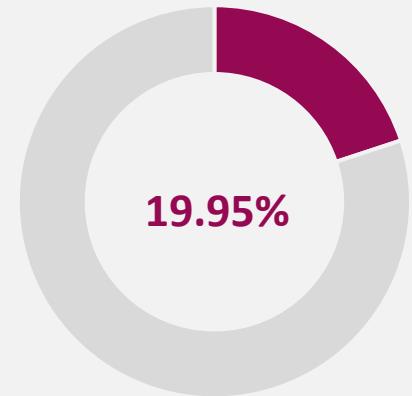
Highest among:

| 43%* | Boat, Bus Trips & Railways |
28%	Castles
27%	Gardens
25%	Historic Sites & Monuments

* Low sample size

Facilities

Facilities at attractions vary widely with size. Larger attractions can offer more facilities than smaller attractions such as cafés, restaurants, and event hire.

Attraction Facilities

Facility	Percentage
Shop	88%
Toilets	86%
Parking	65%
Private hire for events	61%
Café / restaurant / bar	50%
Online shop	22%
Other	6%
None of the above	1%

% of attractions that have

Accessible	**88%**
Baby change	**82%**
Gender neutral	**36%**
Changing Places	**29%**

% Free Parking	**84%**
Cost of 1h parking	**£2.87**
No. of Spaces	**86**
No. of Disabled Spaces	**5**
No. of Electric Spaces	**1**

|	
Event Max. Capacity	**1142**

% In-house Catering	**70%**
No. of covers	**74**

Sustainability Efforts

Smaller attractions were able to use their size to their advantage, with a high number sourcing their products locally. Almost all attractions have some kind of initiative.

Sustainability Initiatives

Initiative	Percentage
Recycling bins for visitors to use	89%
Scheme to support your staff (e.g. cycle to work scheme)	87%
Use of recycled materials	85%
Local sourcing of products and produce	79%
Use of renewable energy sources	75%
Energy saving measures	72%
Ethical sourcing of products and produce	72%
Measures to reduce food waste	66%
Measurement of your carbon footprint	57%
Community engagement projects (e.g. beach clean, litter picking etc)	47%
Water saving measures	38%
Tap water refill points	31%
Use of chemical free cleaning products	26%
Promotion of green transport options for visitors	13%
Support for/partnership with environmental charities	12%
Other	19%
None of the above	1%

Smaller attractions tend to be more able to locally source products

88%
Attractions <100k visitors

Visitor Statistics

About the visit

Visitors tended to visit attractions for around two hours. Non-ticketed attractions had a shorter dwell time. Similarly, ticketed attractions earned a higher spend per visitor than non attractions did. Ticket prices will account for some of this difference.

|	Dwell Time
Overall Dwell Time	**1 hour 56 minutes**
Ticketed	2 hours
Non-Ticketed	1 hour 20 minutes

|	Spend Per Visitor
Average Spend	**£16.70**
Ticketed	£20.37
Non-Ticketed	£4.00

Visitor Demographics

Visitors tend to be older than the population, with the most common age group being 55-64, and low numbers of under 25s. Most visitors are Scottish, though this is affected by geography. Family groups account for a quarter of all visitors.

Age of Visitors

Under 25	25-34	35-44	45-54	55-64	65-75	75+
7%	14%	17%	18%	23%	16%	5%

Origin of Visitors

Overseas: 26%

Scottish 48%

Rest of UK 26%
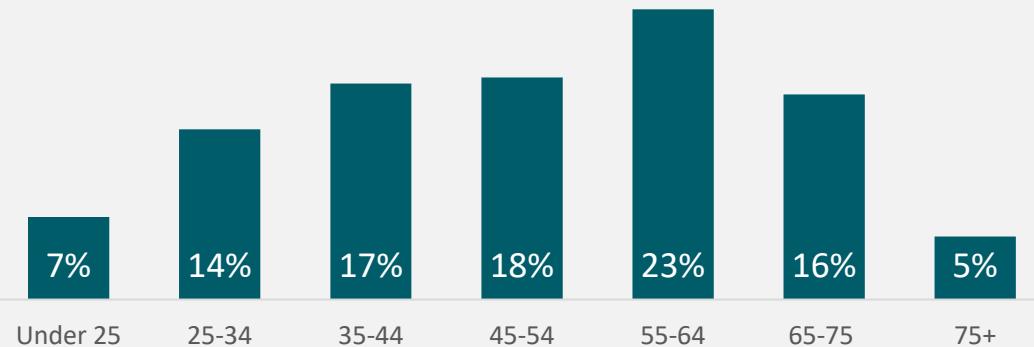
Types of group visits

Visitors in a <u>family</u> group — 26.7%
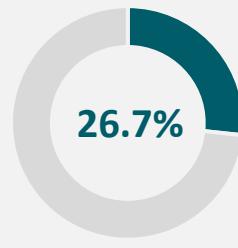
Visitors in a <u>school</u> visit — 3.21%
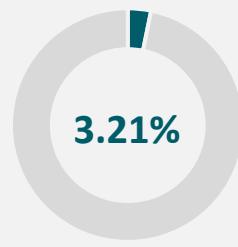
Visitors in a <u>group</u> visit — 10.4%

Disabilities

Attractions reported that 6% of their visitors were disabled. Initiatives put in place for disabilities include working with Euan's Guide, training staff to support disabled visitors, and creating times and spaces where visitors with all kinds of disabilities would be welcome.

% of Visitors with Disabilities

6.35%
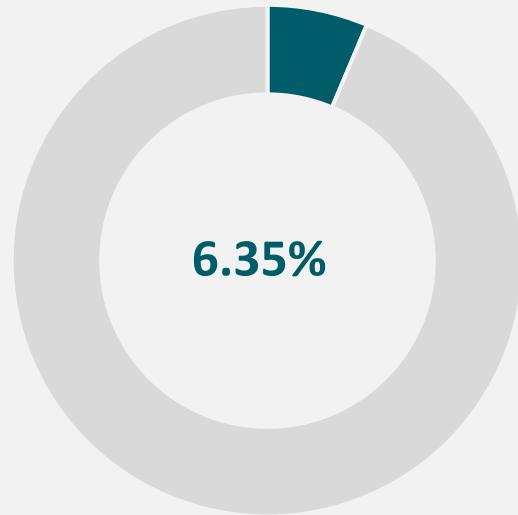
Initiatives for Disabilities

*"We work closely with **Euan's guide** to ensure we are as accessible as possible."*

*"**Changing spaces toilets**, community and outreach programmes"*

*"Staff have **training in tactile tours** for visitors with visual impairment and **dementia friendly tours**."*

Initiatives for Hidden Disabilities

*"We offered a series of **relaxed time slots** aimed at visitors with autism or those who just needed a **bit of extra time**."*

*"**Quiet play times** at play parks"*

*"**Quiet and safe spaces** – where autistic visitors can go when they feel overwhelmed. [and] **Sensory bags** containing ear defenders, emotion cards and fidgets are available from each museum information/enquiry desks."*

Visitor Feedback Mechanisms

Two thirds of attractions use a visitor survey to measure performance of the visit. Of those who have a visitor survey, around half conduct it in-house, while half use an external agency. NPS is high for all types of attractions, averaging +67, demonstrating the world-class attractions Scotland has to offer.

Attractions with a Visitor Survey

67%
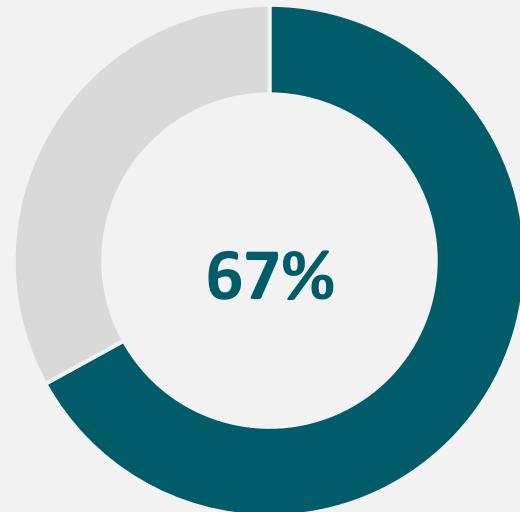
Visitor Survey Mechanisms

% In-house	**47%**
% External Agency	**53%**
% Av. Response Rate	**34%**
NPS Score	**+67**

Financial Statistics

Revenue

Attractions' revenue in 2022 was on average mainly derived from admissions, retail, and other revenue sources, with F&B following closely behind.

	2022 Average per Attraction (£)
Total Admissions Revenue	£143,813.06
Total Food & Beverage Revenue:	£107,269.39
Total Retail Revenue:	£137,524.07
Total Meetings & Events Revenue:	£23,191.78
Total Fundraising Revenue:	£27,112.89
Total Other Revenue:	£189,724.74
Total Revenue:	**£628,635.93**

Costs Breakdown

On average, costs were attained by attractions mostly on payroll, with some costs of F&B and Retail. Repairs and Maintenance was also a high expense for historic attractions and gardens.

	2022 Average per Attraction (£)		2022 Average per Attraction (£)
Admissions Payroll:	£67,361.87	Sales & Marketing Payroll:	£4,095.03
Total Costs:	£26,166.66	Other Sales & Marketing costs:	£4,963.30
Commission costs:	£104.60		
		IT Payroll:	£28.74
Cost of Food & Beverage Sales:	£32,331.24	Other software costs:	£1,549.21
Food & Beverage Payroll:	£24,778.61	Other IT costs:	£269.54
Other Food & Beverage costs:	£216.76		
		Repairs & Maintenance Payroll:	£7,407.83
Cost of Retail Sales:	£70,278.46	Other Repairs & Maintenance costs:	£82,906.80
Retail Payroll:	£15,081.37		
Other Retail costs:	£344.37	Training & Development:	£700.11
		Utilities:	£45,815.82
Meetings & Events Payroll:	£6,049.31	Insurance:	£2,776.45
Other Meetings & Events costs:	£5,216.62	Rates:	£14,300.63
		Other/Rent:	£9,770.99
Admin & General Payroll:	£190,266.99		
Other Admin & General costs:	£95,237.18		
		Total Costs:	**£708,018.49**

Profit and Loss Overall

On average per attraction in 2022, attractions had costs that were higher than their revenue sources. This was particularly the case for smaller attractions.

	2022 Average per Attraction (£)
Total Revenue	£628,635.93
Total Costs	£708,018.49
Profit (Loss)	(£79,382.56)

Appendix

Base Sizes

	Number of responses
All attractions	389
Type of attraction	
Ticketed Attractions	330
Non-ticketed attractions	59
Volume of Visits	
0 - 4,999	28
5,000 - 9,999	21
10,000 - 19,999	27
20,000 - 49,000	29
50,000 - 99,999	23
100,000+	50
Location	
Aberdeen and Aberdeenshire	27
Argyll & The Isles	21
Ayrshire & Arran	8
Dumfries & Galloway	31
Dundee & Angus	16
Edinburgh & The Lothians	48
Fife	19
Greater Glasgow & The Clyde Valley	60
Loch Lomond, The Trossachs, Stirling & Forth Valley	17
Orkney & Shetland	25
Perthshire	27
The Highlands	59
The Outer Hebrides	5
The Scottish Borders	26

	Number of responses
Category of attraction	
Boat, Bus Trips & Railways	9
Castles	42
Churches, Abbeys & Cathedrals	23
Country & National Parks & Forests	41
Distilleries and Breweries	26
Family Fun	3
Gardens	15
Guided Tours & Walks	6
Guided Tours & Walks, Visitor Centers	1
Historic Houses	30
Historic Sites & Monuments	29
Industrial Heritage & Craft Premises	7
Museums, Galleries & Libraries	51
Nature Reserves	54
Science Centres	2
Sports & Leisure Centres	18
Visitor Centres	25
Woollen Mills, Retail & Factory Shops	1
Zoos, Aquariums, Wildlife and Farm Parks	6

ASVA Attractions Survey

The new **ASVA Attractions Survey** analyses the status of the Visitor Attractions sector across Scotland over various parameters and trends. The information and statistics garnered from across the ASVA membership will be utilised by ASVA to support and inform members regarding all matters pertaining to visitor attraction operations and management in Scotland, including the establishment of sector benchmarks, to assist in answering insights related questions from members and other stakeholders and to further its lobbying activities with the Scottish and UK Governments. It will gather key metrics about each organisation so as to more fully understand the industry as a whole.

We encourage all members to participate in this exercise and share the most complete and accurate data as possible. The more responses we have to this survey, the more accurate and valuable the insights and information will be for our members and for ASVA.

We've included the 'save' button on each page, and you can save your progress in the survey, coming back to fill in additional information later, or passing the URL to the survey to a colleague who has the relevant information.

ASVA and SRC work with secure methods for data sharing. Protecting your data is our utmost priority and this continues to be a crucial element throughout the data collection and reporting exercise. The data received is confidential and will be used only to reach aggregate numbers for the industry.

Please be assured, all member property data will be treated with the highest levels of confidence and security.

To assist you with any initial enquiries regarding the required data, you will find a glossary by , and you can see a pdf of the survey by .

Thank you in advance for your cooperation with this extremely important study. We look forward to sharing the results with you in due course.

ASVA
With over 280 organisations in membership, representing more than 500 individual sites across the country, ASVA connects the attractions sector together, providing advice, information, statistics, networking, and training. The organisation's mission is to lead and support its members by sharing expertise, removing barriers, creating opportunities, and encouraging innovation within the Scottish visitor attraction sector.
   Gordon Morrison, CEO ASVA. Email: . Tel: 07458 303 836

SRC
Shanks Research Consultancy aims to deliver insights, consultancy, and training for those who need market research and insight data in their field.
   Claire Shanks, Research Consultant. Email: . Tel: 07832 081 754

ORGANISATION
If you want to access the glossary, please .

We're interested in understanding more information about {AttractionName}.

Questions with an asterisk are compulsory to answer. Please can you answer the following questions as well as you are able to, sharing estimates if you don't know the exact figures?

How many visitors did you have during 2022? *

[   ]

Do you charge an admission/participation fee for any part of your attraction/experience (e.g. entry into {AttractionName}, entry into an exhibition)? *

○ Yes
○ No

Please select the type of organisation that {AttractionName} is from the below list: *
Please select all that apply.

☐ Limited Company
☐ Charity/Charitable Trust
☐ Public Body (e.g. run by local authority or central government)
☐ Sole Trader
☐ Other{Q3a}

- please specify:

[   ]

What are your sources of funding?
Please select all that apply.

☐ Ticket revenue
☐ Donations at the attraction
☐ Large donations (i.e., Bequests)
☐ Memberships
☐ External funding{Q4a}
☐ Events revenue
☐ Retail revenue
☐ Catering revenue
☐ Pay parking
☐ Other{Q4b}

- please specify which sources of external funding you receive:

[   ]

- please specify:

[   ]

ORGANISATION
If you want to access the glossary, please .

Roughly, what percent of the funding from 2022 for {AttractionName} comes from each source?
You can skip this question, but once one box is filled in, you will need to ensure it needs to sum to 100%.

Ticket revenue	[ ] %
Donations at the attraction	[ ] %
Large donations (i.e., Bequests)	[ ] %
Memberships	[ ] %
External funding	[ ] %
Events revenue	[ ] %
Retail revenue	[ ] %
Catering revenue	[ ] %
Pay parking	[ ] %
Other ({Q4b})	[ ] %
Total	%

ORGANISATION
If you want to access the glossary, please .

In terms of investment in {AttractionName}, did you invest in the following aspects in 2022?
Please select all that apply.

- [ ] Development of new facilities & infrastructure
- [ ] Maintenance
- [ ] Staff Development & Training
- [ ] Leadership development
- [ ] Marketing & promotion
- [ ] Other{Q6a}

- please specify:
[   ]

ORGANISATION
If you want to access the glossary, please .

What was the investment expenditure split in 2022 by percentage:
You can skip this question, but once one box is filled in, you will need to ensure it needs to sum to 100%.

Development of new facilities & infrastructure	[ ] %
Maintenance	[ ] %
Staff Development & Training	[ ] %
Leadership development	[ ] %
Marketing & promotion	[ ] %
Other ({Q6a})	[ ] %
Total	%

ORGANISATION
If you want to access the glossary, please .

Does {AttractionName} hold any current tourism awards/accreditations?
Please select all that apply.

- [ ] Visit Scotland Quality Assurance{Q9}
- [ ] Green Tourism {Q10}
- [ ] Taste Our Best
- [ ] Thistle Award{Q11}
- [ ] TripAdvisor Travellers' Choice
- [ ] Other award(s) {Q8a}
- [ ] No awards

- please specify:
[   ]

- What category do you have?

--Click Here-- ▾

Five star
Four star
Three star
Two star
One star

- What category do you have?

--Click Here-- ▾

Gold Award
Silver Award
Bronze Award

- What award do you have?

Great Days Out – National Award for Best Visitor Attraction Experience
Best Visitor Attraction Experience - Regional
Other

ORGANISATION
If you want to access the glossary, please .

Is {AttractionName} open all year round in 2023 or do you operate with seasonal opening and closing dates?

○ Open all year round
○ Seasonal opening and closing

Please select the 2023 opening and closing dates: *

Opening date   [▦ DD/MM/YYYY]

Closing date   [▦ DD/MM/YYYY]

ORGANISATION
If you want to access the glossary, please .

What percentage of your visitors pre-booked a ticket in 2022?
You can skip this question, but once one box is filled in, you will need to ensure it needs to sum to 100%.

Pre-book: [   ] %

Walk-up: [   ] %

Total   %

What percentage of your visitors booked through Online Travel Agencies (OTAs)

[   ] %

ORGANISATION
If you want to access the glossary, please .

What is {AttractionName}'s average visitor dwell time?
Please give dwell time in minutes.

[   ] Minutes

What are your current average ticket prices? *

Adult   [£   ]

Child   [£   ]

Do you operate with Dynamic/Variable Pricing or with a 'pay what you can' policy?

○ Dynamic Pricing
○ Variable Pricing
○ Pay what you can policy
○ No
○ Don't know
○ N/A

ORGANISATION
If you want to access the glossary, please .

What was your 2022 average spend per visitor?

[£   ]

Do you accept donations at {AttractionName}?

○ Yes
○ No

What is your suggested donation amount?

[£   ]

What was your 2022 average donation amount received per visitor?

£ [   ]

Do you accept contactless donations?

○ Yes
○ No

ORGANISATION
If you want to access the glossary, please .

Which marketing sources to you actively use?
Please select all that apply.

☐ Website   ☐ Posters/billboards
☐ TripAdvisor   ☐ Leaflets / brochures
☐ VisitScotland   ☐ Guidebooks (online or in print)
☐ Local tourism group(s)   ☐ Online Travel Agency{Q24a}
☐ Sector group/association   ☐ Travel Trade
☐ Social Media   ☐ Other{Q24b}
☐ Print media   ☐ None of the above

- please specify:

[   ]

- please specify:

[   ]

Which social media sites do you actively use?
Please select all that apply.

☐ Facebook   ☐ TikTok
☐ Twitter   ☐ LinkedIn
☐ Instagram   ☐ Other{Q25a}

- please specify:

[   ]

ORGANISATION
If you want to access the glossary, please .

How do you measure success at {AttractionName}?
Please rank the below from lowest to highest priority.

| Increased Footfall | |
| Increased Membership | |

Visitor Satisfaction scores		
Quality Assurance scores		
Increased Revenue		
Staff wellbeing and retention		
Carbon Footprint Reduction		

EMPLOYEES
If you want to access the glossary, please .

How many employees do you currently have? *
Please enter '0' if you do not have that type of employee.

Full-time employees: [   ]

Part-time employees: [   ]

Unpaid Volunteers: [   ]

Total

EMPLOYEES
If you want to access the glossary, please .

How many of those paid employees are in the following positions? *
Please enter '0' if you do not have that type of employee.
Please ensure the number of employees matches the number given earlier ({V26a} employees).

Management employees: [   ]
Support staff (e.g. IT, HR,   [   ]
Marketing):
Frontline employees: [   ]

Total

What is your Full Time Equivalent Staff count? *

[   ]

EMPLOYEES
If you want to access the glossary, please .

Please can you confirm the 2022 annual payroll amount for the following two groups:

Management employees: £ [   ]
Support staff (e.g. IT, HR,   £ [   ]
Marketing):

Frontline employees: £ [   ]

Total

Are you a real living wage / national living wage employer?

○ Yes – Real living wage
○ Yes – National living wage
○ No

EMPLOYEES
If you want to access the glossary, please .

What percentage of employees in {AttractionName} are in the following age brackets:
You can skip this question, but once one box is filled in, you will need to ensure it needs to sum to 100%.

Under 25 years old: [   ] %

25-34 years old: [   ] %

35-44 years old: [   ] %

45-54 years old: [   ] %

55-64 years old: [   ] %

65-75 years old: [   ] %

75 or older: [   ] %

Total %

What percentage of employees in {AttractionName} identify as male, female, or non-binary?
You can skip this question, but once one box is filled in, you will need to ensure it needs to sum to 100%.

Female: [   ] %

Male: [   ] %

Non-binary: [   ] %

Total %

What percentage of employees in your organisation identify as having a disability?

[   ] %

What percentage of employees are unpaid carers (i.e who provide care and support to others who cannot manage without their help)?

[   ] %

What percentage of employees come from an ethnic minority background?

[   ] %

EMPLOYEES
If you want to access the glossary, please .

Do you provide any other benefits to employees?
Please select all that apply.

☐ Extra holidays
☐ Bonus scheme(s)
☐ Incentive scheme/vouchers
☐ Memberships (to clubs, gyms etc)
☐ Medical/Dental cover
☐ Flexible hours

☐ Employee assistance programme(s)
☐ Initiatives to support wellbeing (e.g., free healthy food for staff, free yoga classes, bike to work schemes, etc)
☐ Company shares scheme/option to invest in company
☐ Continual Professional Development programmes
☐ Other{Q37a}

- please specify:

[   ]

In 2022, what was {AttractionName}'s absence level?
It's helpful for us to know this information to track the staffing issues faced by attractions.

Paid hours lost in 2022 from FT staff: [   ]

Paid hours lost in 2022 from PT staff:

Unpaid hours lost in 2022 from FT staff:

Unpaid hours lost in 2022 from PT staff:

Total

And in 2022, what was {AttractionName}'s turnover percentage?
As a percentage, how many staff did you lose who have not returned/will not return to your business (i.e. not including seasonal staff you anticipate re-joining this season).
Staff Turnover Percentage = (Number of Employees Who Left / Average Number of Employees) x 100)
It's helpful for us to know this information to track the staffing issues faced by attractions.

[   ] %

INNOVATIONS
If you want to access the glossary, please .

In 2022, did you introduce any new innovations into {AttractionName}?
If so, please provide brief details in the comments box below.
For example, new types of products, dynamic pricing, premium products, new website, new ticketing system, new revenue streams, new employee support programmes, new community engagement programmes etc. This could be anything at all that has helped support your business and/or your visitors.

FACILITIES
If you want to access the glossary, please .

Does {AttractionName} offer any of the following facilities? *

- [ ] Private hire for events, conferences, workshops
- [ ] Café / restaurant / bar
- [ ] Shop
- [ ] Online shop
- [ ] Toilets
- [ ] Parking
- [ ] Other{Q41a}
- [ ] None of the above

- please specify:

FACILITIES
If you want to access the glossary, please .

What is the maximum capacity for events?

[   ]

Do you accept contactless payment options?
- ( ) Yes
- ( ) No

Is the catering in-house or outsourced catering?
- ( ) In-house catering
- ( ) Out-sourced catering

How many covers (seats) do you have at your onsite café/restaurant/bar in total?

[   ] covers

Does {AttractionName} have any of the following types of toilet facilities?
- [ ] Accessible
- [ ] Changing Places (i.e. fully accessible – have facilities and space for people who cannot able to use the toilet independently)
- [ ] Baby change
- [ ] Gender neutral

Is the parking free or pay parking?
- ( ) Free parking
- ( ) Paid parking

How much does parking cost for 1 hour?
[£   ]

Please can you tell us how many car parking spaces {AttractionName} has?

Total number of car parking spaces: [   ]

Number of disabled parking spaces: [   ]

Number of electric charging parking spaces: [   ]

Which of the following sustainability measures do you implement at {AttractionName}?

- [ ] Tap water refill points for water bottles
- [ ] Scheme to support your staff make sustainable choices (e.g. cycle to work scheme)
- [ ] Recycling bins for visitors to use
- [ ] Ethical sourcing of products and produce
- [ ] Local sourcing of products and produce
- [ ] Measurement of your carbon footprint
- [ ] Promotion of and/or incentivisation of green transport options for visitors
- [ ] Use of renewable energy sources
- [ ] Energy saving measures (e.g. upgrades to buildings to conserve energy)

- [ ] Water saving measures (e.g. low flow taps)
- [ ] Use of chemical free products (e.g. for cleaning purposes)
- [ ] Measures to reduce food waste
- [ ] Use of recycled materials (e.g. recycled paper, veg based inks etc)
- [ ] Support for/partnership with environmental charities
- [ ] Community engagement projects which support environmental sustainability (e.g. beach clean activities, local litter picking etc)
- [ ] Other{Q50a}
- [ ] None of the above

- please specify:

[   ]

VISITORS

If you want to access the glossary, please .

In 2022, what percentage of visitors are in the following age brackets:

You can skip this question, but once one box is filled in, you will need to ensure it needs to sum to 100%.

Under 25 years old: [   ] %

25-34 years old: [   ] %

35-44 years old: [   ] %

45-54 years old: [   ] %

55-64 years old: [   ] %

65-75 years old: [   ] %

75 or older: [   ] %

Total

During 2022, what percentage of visitors are from the following areas:

You can skip this question, but once one box is filled in, you will need to ensure it needs to sum to 100%.

Scottish: [   ] %

Rest of UK: [   ] %

Overseas: [   ] %

Total

In 2022, what percentage of visitors are from the following types of group:

Family Groups: [   ] %

School Visits: [   ] %

Group Visits: [   ] %

How many ASVA card holder tickets did you admit during 2022?

[   ]

DISABILITIES

If you want to access the glossary, please .

In 2022, what percentage of visitors have disabilities?

[   ] %

Do you have any initiatives or participate in any programmes specifically aimed at visitors with visible disabilities?

If so, please provide brief details in the comments box below.

[   ]

Do you have any initiatives or participate in any programmes specifically aimed at visitors with hidden disabilities/autism?
If so, please provide brief details in the comments box below.

[ ]

VISITOR FEEDBACK
If you want to access the glossary, please .

Do you have a visitor survey?

( ) Yes
( ) No

How do you conduct the visitor survey?
Is the survey online based or paper? Are you running the survey in-house, or using a research agency? Do you send a survey to all visitors, or just to a selection.

[ ]

What is the response rate of your feedback surveys?
Number of responses / Number to who you send the survey

[ ] %

If you include it, what is your average Net Promotor Score (NPS) figure from 2022?

[ ] NPS

FINANCIALS
If you want to access the glossary, please .

All the following questions are asking about 2022 data (Jan-Dec 2022).

We recognise that we are asking for some sensitive financial information from you in these questions. However, please be assured that data received from individual members will not be shared with any other members or any external source, it is purely to allow ASVA to create aggregated data and to establish sector wide benchmarks. The responses you provide will help us to better understand and inform our members, as well as to advocate on behalf of our sector more effectively.

If you would prefer not to share this information, you can skip this page and submit your survey responses.

Please give rough estimates if you are unsure about exact amounts. Please enter zero in the questions which are irrelevant.

Please can you confirm the 2022 visitor number information you previously shared with ASVA: {ID.VisitorNumber} visitors.

( ) This is correct
( ) This is incorrect{Q62a}

- Please can you share the correct number of visitors in 2022?

[ ]

Revenue

Total **Admissions** Revenue:	£ [ ]
Total **Food & Beverage** Revenue:	£ [ ]
Total **Retail** Revenue:	£ [ ]
Total **Meetings & Events** Revenue:	£ [ ]
Total **Fundraising** Revenue:	£ [ ]
Total **Other** Revenue:	£ [ ]
Total Revenue:	£

FINANCIALS
If you want to access the glossary, please .

Costs

Admissions:

Admissions Payroll:	£ [ ]
Other Admissions costs:	£ [ ]
Commission costs:	£ [ ]
Total Admissions Costs	£

Food & Beverage:

Cost of Food & Beverage Sales:	£ [ ]
Food & Beverage Payroll:	£ [ ]
Other Food & Beverage costs:	£ [ ]
Total Food & Beverage Costs	£

Retail:

Cost of Retail Sales: £ ___

Retail Payroll: £ ___

Other Retail costs: £ ___

Total Retail Costs £ ___

Meetings & Events:

Meetings & Events Payroll: £ ___

Other Meetings & Events costs: £ ___

Total Meetings & Events Costs £ ___

Admin & General:

Admin & General Payroll: £ ___

Other Admin & General costs: £ ___

Total Admin & General Costs £ ___

Sales & Marketing:

Sales & Marketing Payroll: £ ___

Other Sales & Marketing costs: £ ___

Total Sales & Marketing Costs £ ___

IT systems and infrastructure

IT Payroll: £ ___

Other software costs: £ ___

Other IT costs: £ ___

Total IT Costs £ ___

Repairs & Maintenance:

Repairs & Maintenance Payroll: £ ___

Other Repairs & Maintenance costs: £ ___

Total Repairs & Maintenance Costs £ ___

Other Costs:

Training & Development: £ ___

Utilities: £ ___

Insurance: £ ___

Rates: £ ___

Other/Rent: £ ___

Total Other Costs £ ___

FINANCIALS

If you want to access the glossary, please .

Please can you confirm below the details which you have already shared, if any are incorrect, please go back to the respective page and amend.

Total Revenue: £ ___

Total Admissions Costs £ ___

Total Food & Beverage Costs £ ___

Total Retail Costs £ ___

Total Meetings & Events Costs £ ___

Total Admin & General Costs £ ___

Total Sales & Marketing Costs £ ___

Total IT Costs £ ___

Total Repairs & Maintenance Costs £ ___

Total Other Costs £ ___

Total Costs £ ___

Please tick the box below to confirm totals are correct to the best of your knowledge. We encourage you to share the most complete and accurate data possible.

☐ My answers are complete and accurate to the best of my knowledge

Thank you for taking part in the 2023 ASVA Annual Attractions Survey. Please submit your responses by selecting Submit below.

We'll use these figures to better understand the Scottish Visitor Attraction industry, and to improve the work we do on behalf of you.

If you have any further questions about this project, please contact us below:
Gordon Morrison:
Claire Shanks:

As a thank you, we're donating £100 to the below three charities. We'll donate the money based on the responses to the below question.