



ASSOCIATION OF VISITOR
EXPERIENCES & ATTRACTIONS



SURVEY OF MEMBERS

2023

PERFORMANCE REPORT

*Representing the Irish
Visitor Experience &
Attractions Sector*



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**SURVEY OF
BUSINESS PERFORMANCE 2023**



- Detailed Results -

July 2024

CHL

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Dear members

I am delighted to present to you the findings of the Annual Survey of Member Business for AVEA for the year 2023.

Our research partners CHL Consulting have once again worked closely with our membership to gather valuable data, to analyse it, and to present it in a way that brings insight and value to members, and validity and heft to our advocacy. Thanks are due to Michael Counahan and Siobhán McMahon for their impeccable management of the survey process. We understand that confidentiality around data is of paramount importance for our members, and the independence and impartiality of the reporting must be impeccable – values that Michael and Siobhán display at every turn.

There is no doubt that, while the pandemic is in the rear-view mirror, we are still in a period of transition. 2023 is considered the first ‘full’ year of tourism, but what does the new normal look like, and what changes are we seeing? Aviation connectivity has been restored to pre-pandemic levels, and on some market routes is better than ever. We are all aware that there has been huge disruption to the tourism accommodation sector in recent years, with more uncertainty on the horizon as the legislation around short-term letting is framed. As business managers, we are dealing with increased costs of doing business which must be balanced against the value proposition we offer our visitors.

It is also true to say that, as a sector, tourism was very well-supported during the extended period of lockdown, restrictions, and phased re-openings. In addition to wage supports and the CRSS, the forward-thinking Digital that Delivers initiative was transformative in improving the capability of our members to reach new audiences and convert sales – both imperative in a competitive tourism environment.

As an Association, it is vital that we continue engage with our tourism agencies Fáilte Ireland, Tourism Ireland and Tourism Northern Ireland; that we avail of learning, development and marketing opportunities that are presented to us; that we participate in research; and that we advocate for robust budgets to support their activities. AVEA works closely, collaboratively and positively to ensure our relationships with the agencies are mutually beneficial with insights, exchange of knowledge, new ideas, and progressive thinking. In doing so, we strive to inform Government policy, and be a positive actor for change and growth in support of tourism ambition.

Data from the Survey reveals that attracting and retaining staff remains a challenge for many businesses, and AVEA will continue to focus on tourism careers and educational opportunities that put visitor experiences front and centre as attractive, enjoyable and vibrant places to work. Staff costs make up the largest part of operating expenses – almost 50% – and respondents report on challenges recruiting guides and front-of-house staff in particular. As a sector with high overheads, tight margins, getting the staffing balance right is not easy, both in rural and urban locations, with external factors like the wider jobs market, the rental market, and rising living costs impacting on us.

We owe our gratitude to our valued Platinum Partners who provide valuable financial assistance enabling the Association to deliver a comprehensive programme of works including this Survey, our Member Forums, and our Annual Conference – all in support of AVEA’s core objectives: member networking and knowledge exchange, research, advocacy, education and career development, and best sustainability practices.

I would also like to take this opportunity to recognise the commitment and work of our voluntary Board of Directors, who are drawn from the membership. Across the tourism sector, AVEA has established a strong foothold and a collegiate relationship with our colleagues on the Tourism Industry Advisory Group, the Tourism and Hospitality Forum, and the Irish Tourism Industry Confederation (ITIC.) AVEA will not be found wanting in seeking an audience with the most senior decision-makers to ensure our members can achieve their full tourism potential.

This year, we have had the highest participation rate ever in the Survey, at 79%. I would like to thank all our members who continue to engage and provide responses, to empower AVEA with the facts and figures to work on your behalf. As the Association continues to grow, 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 truly understand the nature and value of the VEA sector, and the vital role it plays in both urban and rural settings in driving economic activity and social sustainability.



Geraldine Enright
AVEA Chair
August 2024

1. SURVEY INTRODUCTION AND EXECUTIVE SUMMARY

1.1 Introduction

This report presents the findings of the seventh annual survey of AVEA's members with regard to their business performance over the previous year. This iteration of the survey covers 2023, the first full year of normal business post Covid-19.

The survey questionnaire was issued to 121 AVEA members in February 2024. Responses were received from 96, representing a response rate of 79%. 32 of the respondent sites (33%) are in Dublin and 64 are spread throughout the rest of Ireland, including 3 from Northern Ireland¹. 29 of the respondent sites are operated directly by State bodies and local authorities; the remainder are run by private entities, 35 of which are not-for-profit.

One of the criteria for membership of AVEA is agreement to participate in the Association'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 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 19.6 million visitors in 2023; this represents about 53% of visits to all attractions in Ireland**
- **AVEA's members employ over 6,400 people.**

¹ For respondent attractions based in Northern Ireland, it is noted that some submitted responses in €, but for those submitted in £, a conversion rate of £1 = €1.17 was applied (the relevant conversion rate on 19th April 2024 when the response was analysed).

- AVEA's members generated an estimated €362 million in revenues in 2023 a very high proportion of which flowed into their local economies in wages and purchasing of goods and services.

1.2 Executive Summary

- 1) Following the years of restrictions imposed under the Covid-19 pandemic, visitor attractions and experiences returned to a normal operating season in 2023. Survey respondents were open for an average of 49 weeks in 2023 – the average for attractions in Dublin was 50 weeks as against 48 weeks for those outside Dublin.
- 2) The 96 survey respondents received a total of 18.1 million visitors in 2023, significantly more than in 2022 but still well below the 22.9 million received by respondents to the 2019 survey. Overall, AVEA's members, including non-respondents, received an estimated 19.5 million visitors in 2023, which represents about 53% of visits to all attractions in Ireland.
- 3) Some 55 attractions responded to both the 2019 and 2023 surveys, and their figures show that the number of visitors they received in 2023 was 6% below their 2019 total. This was a strong performance given that Ireland's inbound tourist numbers in 2023 were still about 35% below that recorded in 2019.
- 4) The rank order of source markets in terms of admissions is essentially the same as in previous years with the domestic market leading followed by North America, Britain, France and Germany. However, the share accounted for by the domestic market (including Northern Ireland) fell from 43% in 2022 to 32% in 2023. This is illustrative of improved performance in overseas tourism in 2023, especially the North American market which accounted for 25% of admissions in 2023.

- 5) Attractions outside Dublin have a much higher dependency on the domestic market than is the case for Dublin attractions. On the other hand, attractions in Dublin received higher proportions of visitors from Britain, Other Europe, France, Italy and Spain than is the case for attractions outside Dublin.
- 6) 7 out of every 10 admissions to respondent attractions in 2023 purchased individual tickets. Not all were at full price - this category includes concessions (students, pensioners, etc.), families and children. The results for 2023 showed a slight decrease in the share of group admissions in 2023 over 2022 with total group admissions in 2023 accounting for some 22% of the total compared to 25% in 2022. The corresponding figure for group admissions in 2019 was 26%.
- 7) The seasonal pattern of admissions reflects the general seasonality of tourism in Ireland. The seasonal peaking of demand during the summer months (May-September) is much more pronounced at sites outside Dublin than at those in Dublin. While this reflects the greater off-peak flows in city break demand, the proportion of demand outside Dublin that was concentrated into the May-September period in 2023 (67%) was higher than in pre-Covid times (e.g. 59% in 2019).
- 8) In 2023, the share of revenue earned from ticket sales averaged 55% which was consistent with pre-Covid patterns. Retail and café/restaurant sales respectively accounted for 15% and 9% of total revenue. Café/restaurant sales are much more significant as a share of revenue at 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 attraction forms part of the overall visitor experience.
- 9) Overall, there was an increase of just over 5% in average ticket prices over 2022 to reach €11.32, net of VAT. On the other hand, the average retail spend per head fell by 8% to €4.70. The largest increase was in average food and beverage sales per visitor which rose by 24% to €6.70 per visitor in 2024. The difference in sample sizes probably

contributed to some of the difference but increased food & beverage prices due to increased costs may have been a more significant factor.

- 10) The median or central value in the set of responses may be a more representative figure for many attractions, with the median ticket yield per visitor being €9.66, the median retail spend being €2.70 and median food and beverage spend per visitor being €4.51. All of these figures are net of VAT. Brand experiences recorded significantly higher average sales per visitor in ticketing, retail and F&B.
- 11) The survey findings show that there is, potentially, an average of up to around €23 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. The cumulative median value amounted to €16.87.
- 12) Staff costs account for the largest share of operating costs at 49% of the total which is consistent with the share of 48% in 2022 but up from the share of 42% recorded in 2021. Repairs & maintenance (7%), energy (6%), and marketing/sales costs (5%) are the next most significant cost items. Insurance averaged 3% of total operating costs. A small percentage of sites are paying substantially more for insurance, amounting to as much as a 10%-16% share of total costs. The majority of respondents experienced an increase in insurance premiums, the average being about 12%.
- 13) 90 of the 96 survey respondents gave their staff numbers and together employed a total of 5,200 people in 2023, an average of 58 per site, up from 50 in 2022. Based on the survey responses, it is estimated that AVEA's members employ over 6,400 staff in total. Some 38% of these employees are engaged on a full-time year-round basis, with the balance divided between part-time year-round (18%), seasonal (29%) and volunteers (15%).
- 14) As in 2022, there were significant recruitment needs in most functions, but the areas of greatest need were guides, general front-of-house staff, sales & marketing and retail. High proportions of respondents have experienced difficulties recruiting staff for these

positions. The principal obstacles to the recruitment of new staff in 2023 were level of pay, a lack of candidates, and seasonality of employment.

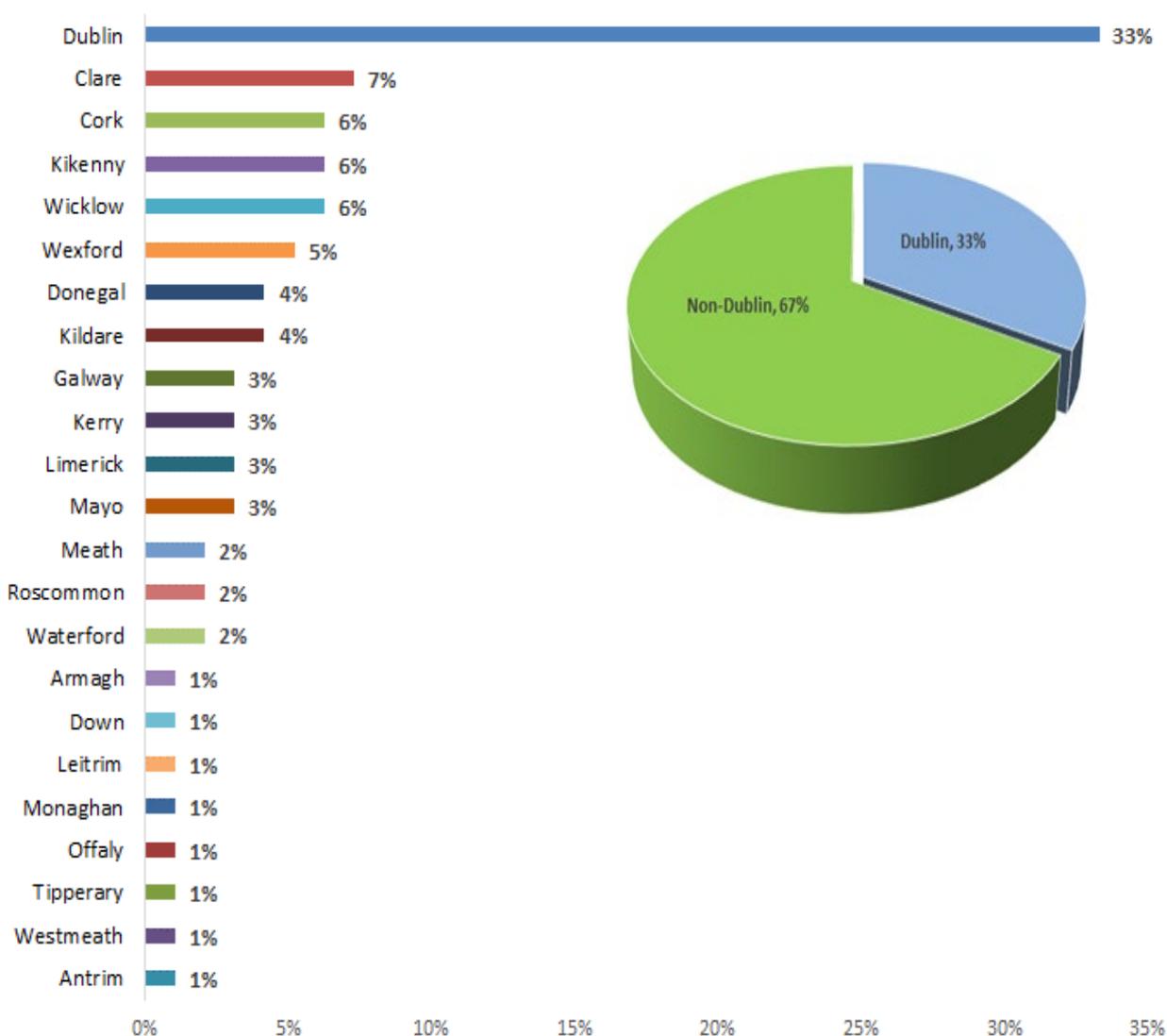
- 15) When analysed on a Dublin vs Non-Dublin basis, the key difference between the two groups relate to lack of candidates (especially outside Dublin), availability of accommodation for staff (a major issue in Dublin) and seasonality of employment (a much bigger issue for sites outside Dublin).
- 16) This was the first year that questions were asked in relation to staff remuneration at member attractions. The survey found that the majority of attractions pay their staff above the minimum wage. Where staff are on the minimum wage, they are more likely to be seasonal employees. Pay increases for staff not on minimum wage averaged 5.5%.
- 17) 89% of respondents have an online ticket sales capability, a small increase on the 85% recorded in the 2022 survey. Almost all have a system capable of selling tickets with specified time slots. Two-thirds of respondents have ticketing systems integrated with other sales and marketing systems.
- 18) The overall average share of tickets sold online in 2023 was 33%, very slightly below the 34% recorded in 2022 but almost double the average of 17% recorded in 2019. On average, sites in Dublin sell a higher proportion (44%) of tickets online than is the case with sites outside Dublin (27%). The shift to online shopping and bookings in recent years both during and post the Covid-19 pandemic has contributed to the growth in online sales, and 92% of respondents expect this trend to continue.
- 19) Looking ahead, 97% of respondents anticipate increased visitor numbers in 2024 with slightly more (99%) expecting increased revenue. These proportions are similar to those projected for 2023 in last year's survey. The average scale of increase expected is 9.5% for visitors and 11.5% for revenue. If demand in 2023 was 6% below the 2019 peak, as indicated by the comparison of performance across both years at some 55 sites, the anticipated growth in 2024 should see many sites exceeding that peak.

2. ABOUT YOUR ATTRACTION

2.1 Location

32 of the 96 respondents (33%) are based in Dublin. The remaining 64 are spread across some 22 other counties in the Republic of Ireland and Northern Ireland. This represents a much larger number of respondents from outside Dublin than was recorded by any of the previous annual surveys. It also reflects the concentration of larger attractions in Dublin.

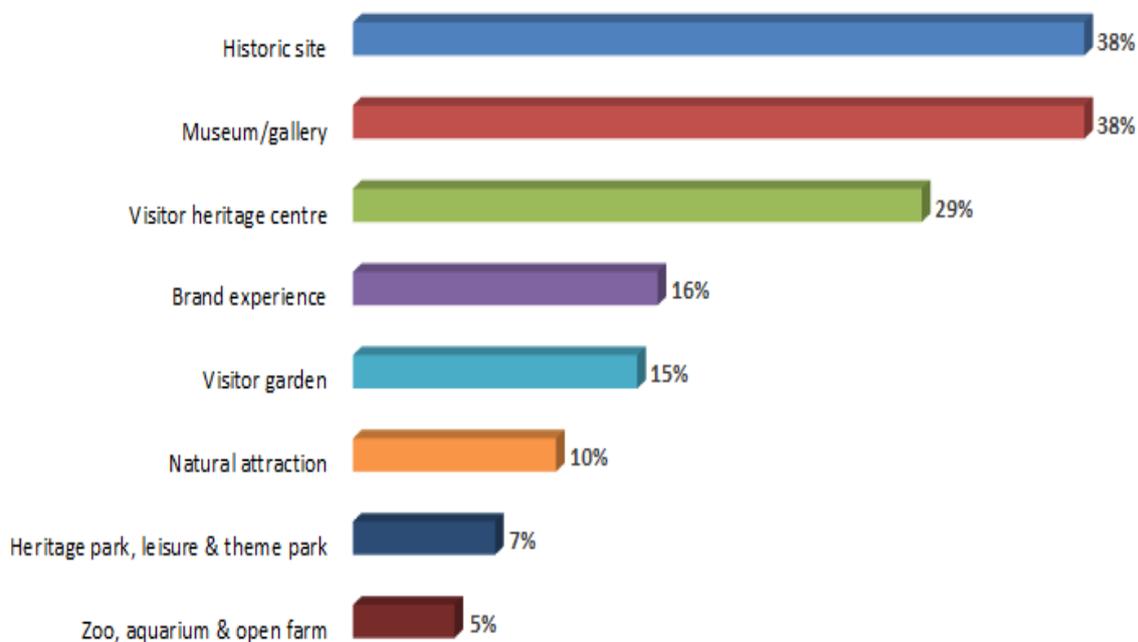
Figure 2.1: Distribution of Respondents by County



2.2 Category of Attraction

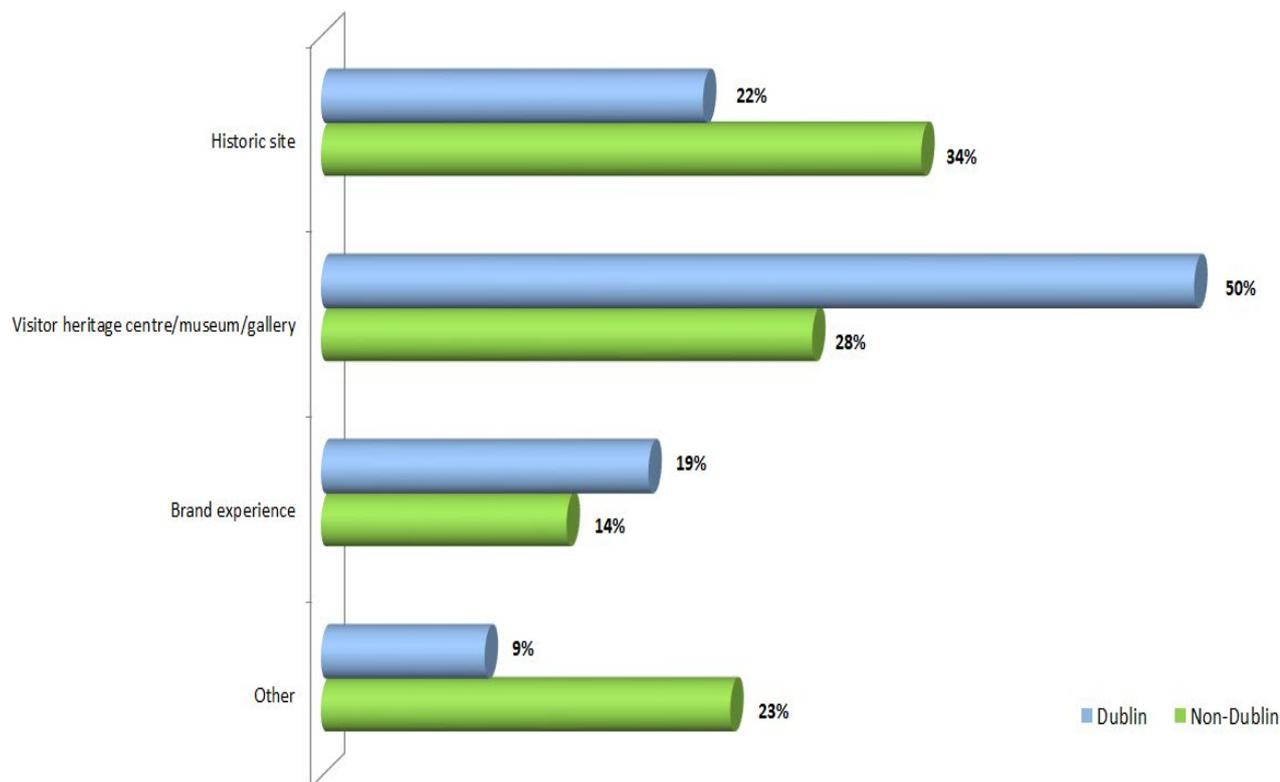
Historic Sites and Heritage experiences, including Museums and Galleries, together account for the majority of all respondent attractions. A number of respondents fall into more than one category as they offer two or more distinctly different experiences. The distribution of respondents by category of attraction is shown in Figure 2.2.

Figure 2.2: Category of Attraction



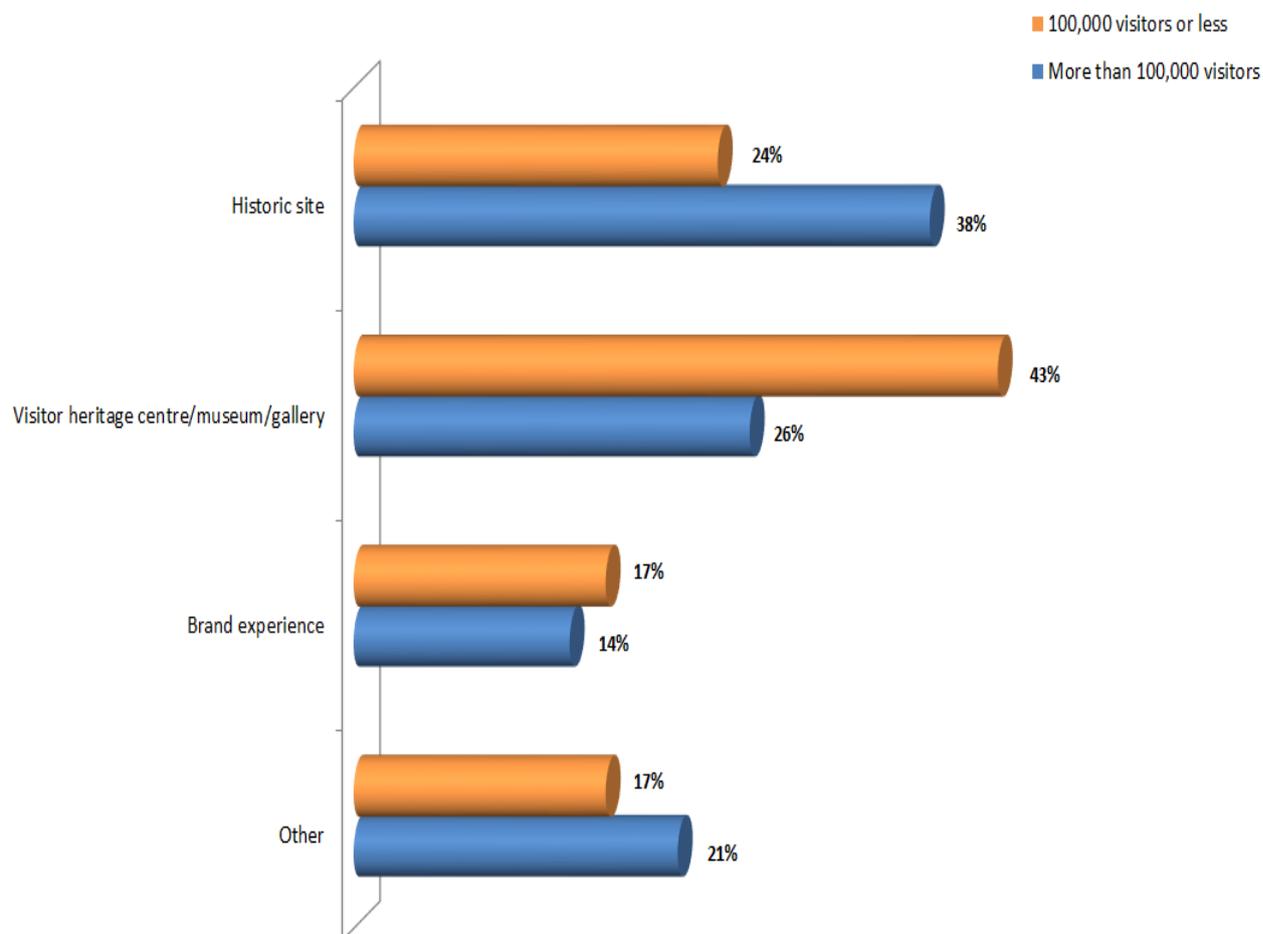
Note: Totals add to more than 100% as a number of respondents fall into more than one category.

Figure 2.3: Category of Attraction – Dublin vs Non-Dublin



As Figure 2.3 shows, the distribution of attraction by category differs quite a bit between Dublin and the rest of the country. Thus, Dublin has a greater concentration of Heritage Centres and Brand Experiences while Historic Sites and attractions based on nature are more commonly located outside Dublin. ‘Other’ in this chart includes gardens, natural attractions, heritage parks, leisure and theme parks, zoos, aquariums and open farms, theatres and science centres.

Figure 2.4: Category of Attraction
 – 100,000 or fewer visitors vs more than 100,000 visitors

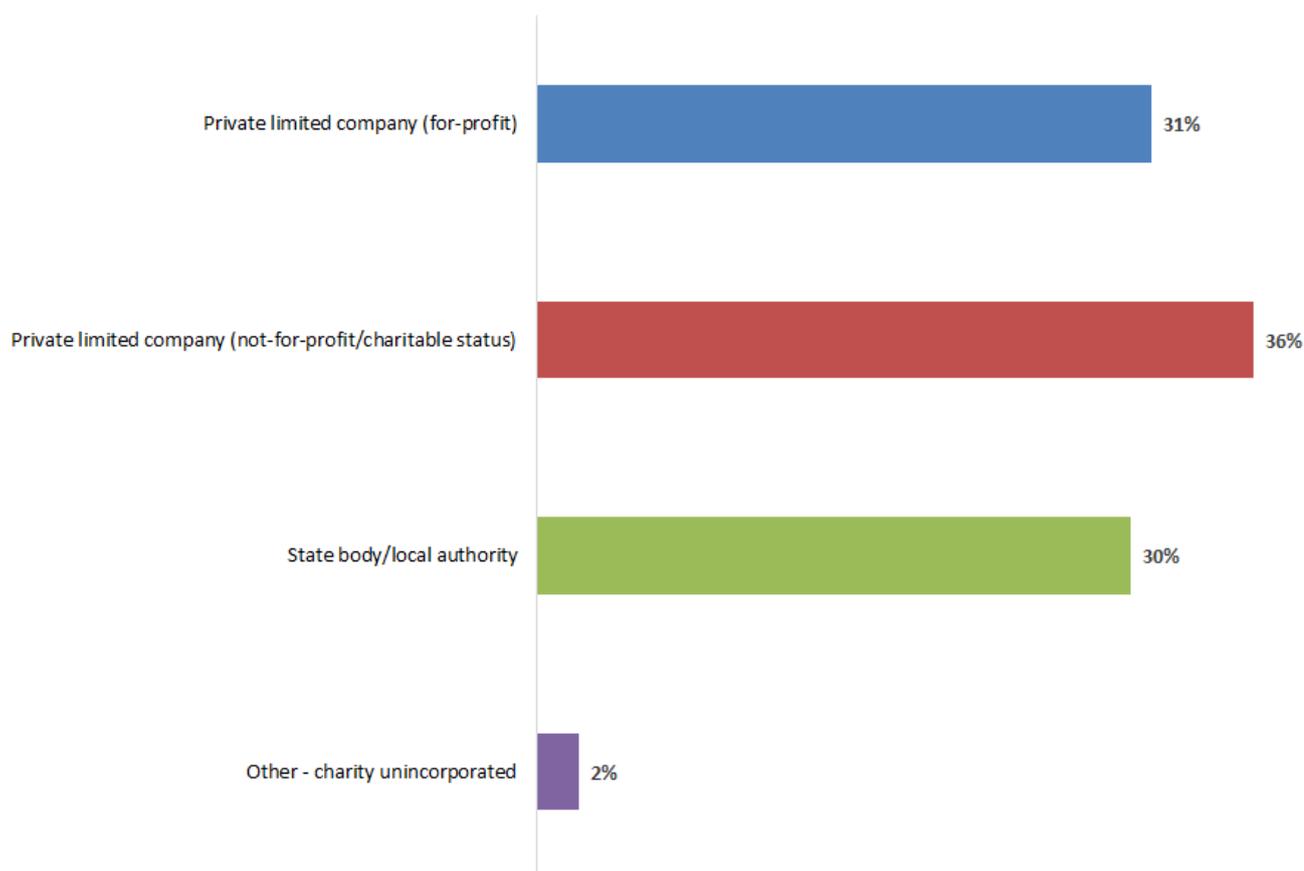


Most categories of attractions have reasonably similar distributions in terms of scale of visitation, the notable exception being heritage centres, museums and galleries which includes many of the smaller sites. Many of the historic sites have larger visitor numbers, reflecting their popularity and significance, while over 40% of heritage centres have fewer than 100,000 visitors a year.

2.3 Type of Organisation

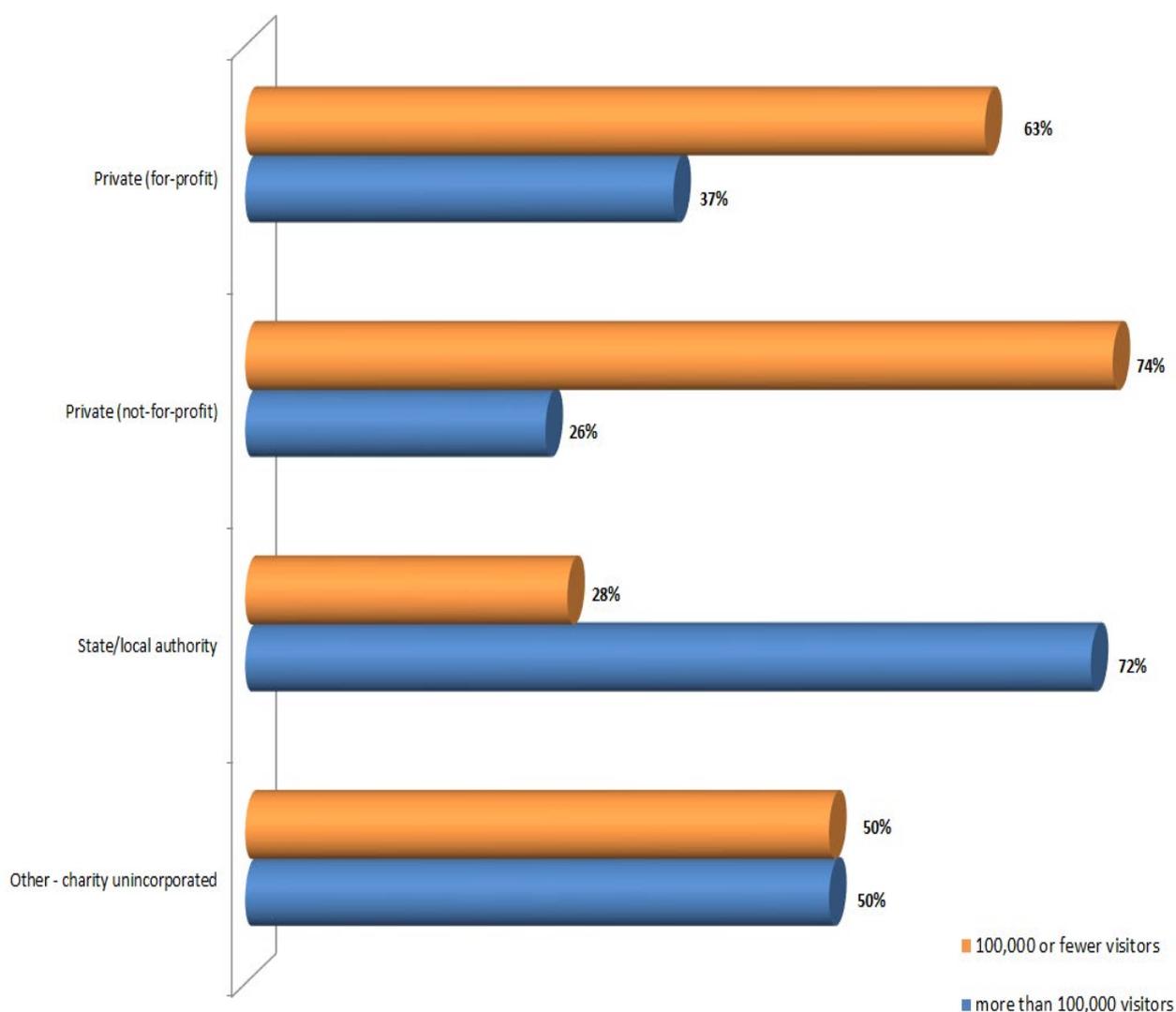
31% of respondents are private commercial operators and a further 36% are private not-for-profit companies. The latter are typically companies limited by guarantee with many, if not most, having charitable status. 30% of the respondents are owned and operated by State agencies or Local Authorities. The remaining balance of 'Other' respondents comprises sites of unique corporate form, including unincorporated charities and universities.

Figure 2.5: Distribution of Respondents by Organisation Type



In terms of organisation type by number of visitors, a high proportion (72%) of State/Local Authority sites receive in excess of 100,000 visitors a year – Figure 2. 6. On the other hand, a majority of private for-profit and not-for-profit respondents receive fewer than 100,000 visitors a year.

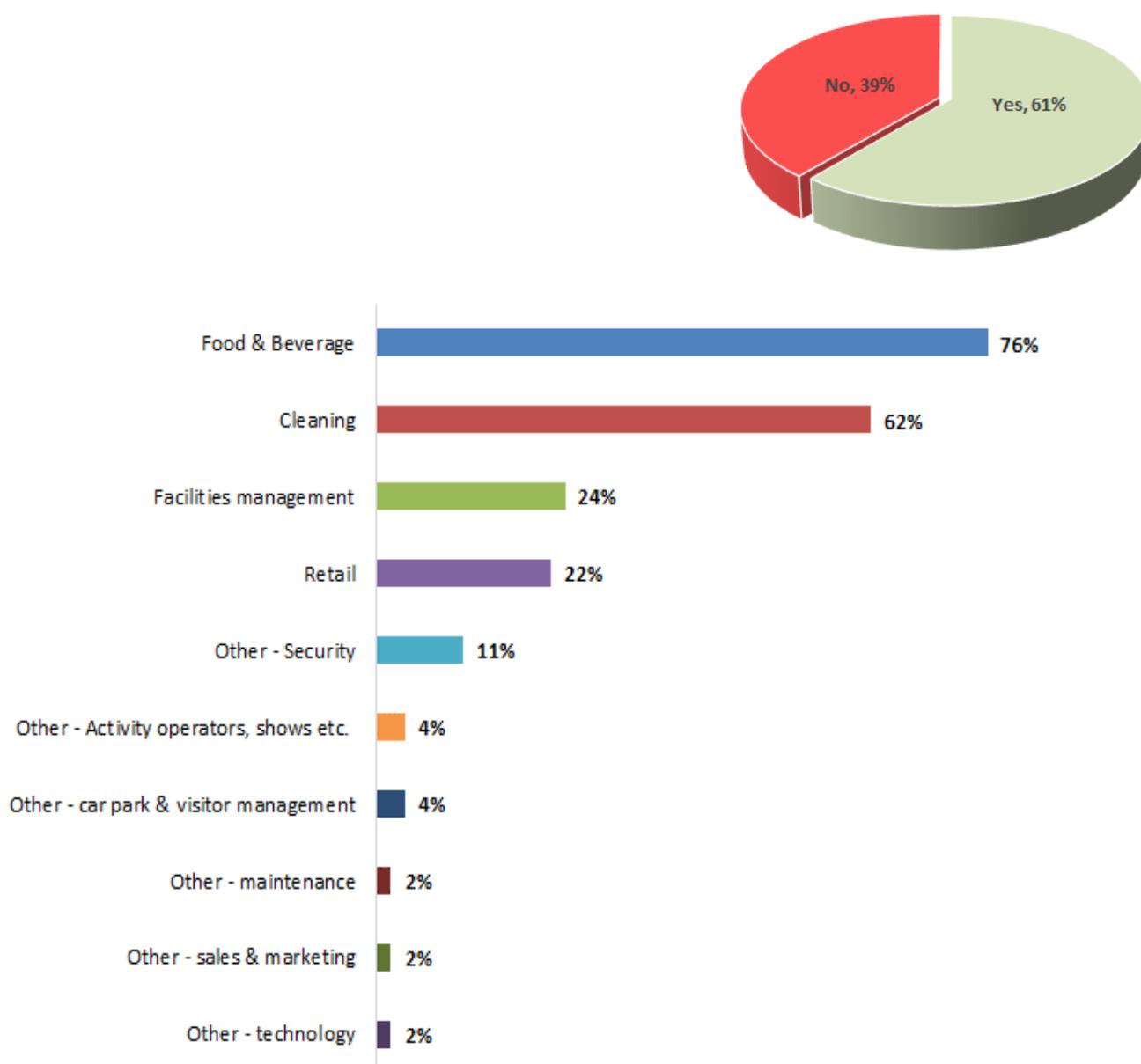
Figure 2.6: Distribution of Respondents by Organisation Type and by Number of Visitors – 100,000 or fewer visitors or less vs more than 100,000 visitors



2.4 Use of External Contractors/Concessionaires

61% of the survey respondents employ external contractors and/or concessionaires on site. As Figure 2.7 shows, such external providers are mostly used to operate food and beverage outlets and provide cleaning services. Smaller proportions of respondents engage external contractors to provide facilities management services and to run retail outlets.

Figure 2.7: Use of External Contractors / Concessionaires



2.5 Weeks Open to Visitors

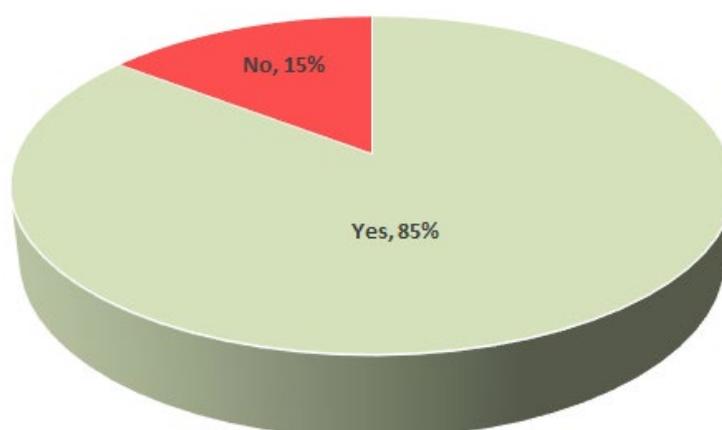
Respondents were open for an average of 49 weeks in 2023. This is a welcome return to the 2019 average of 49 weeks, up from the 45 weeks recorded in 2022 and a substantial increase on the average of 29 weeks recorded in 2021.

Dublin-based respondents had a longer season than those outside Dublin, being open for an average of **50 weeks** compared to **48 weeks** for those located outside Dublin.

2.6 Admission

85% of respondents charge for admission. Those who offer free admission are all owned or funded by the State.

Figure 2.8: Charge for Admission



3. FINANCIAL DATA

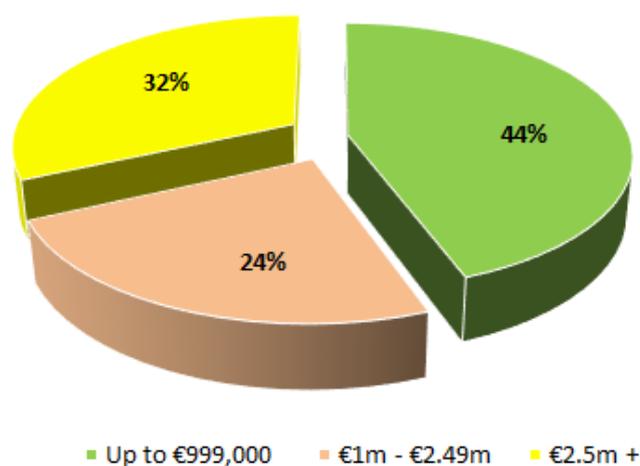
3.1 Revenue in 2023

The distribution of respondents by scale of revenue is detailed in Figure 3.1 below. In total, the 88 respondents who answered this question generated €328.3 million in revenue in 2023. Grossing up on the basis of average visitor expenditure produces an estimated total revenue for all AVEA members of €362 million in 2023. This total is not directly comparable to previous years due to some significant differences in membership. However, it may be noted that across 44 sites who provided the relevant information in both 2019 and 2023, the overall average revenue per visitor in 2023 was €18.32, an 18.7% increase on the €15.44 recorded for this group of sites in 2019.

At almost half (44%) of all respondent sites, annual revenue amounts to less than €1 million; another 24% earn between €1 million and €2.5 million, with the balance (32%) earning over €2.5 million.

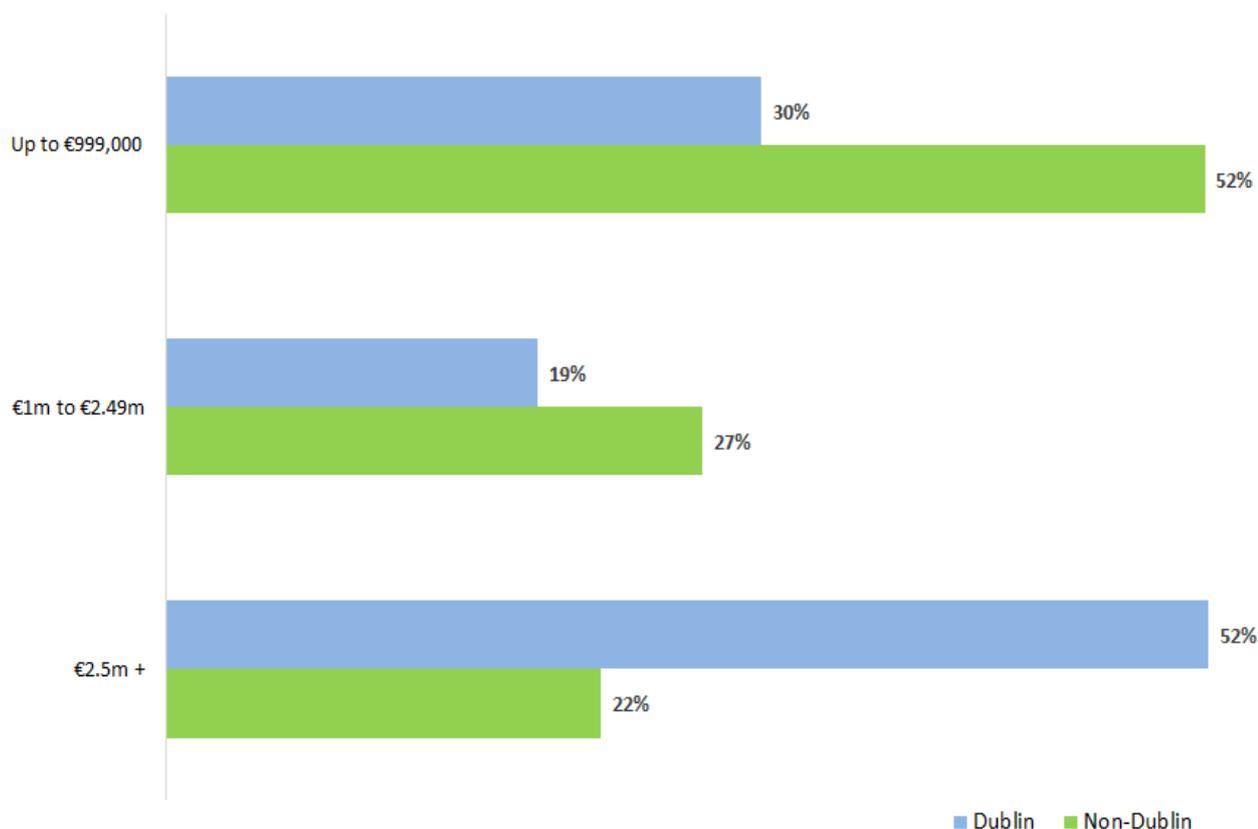
Figure 3.1: Distribution of Respondents by Revenue

	Actual	%
Up to €999,000	39	44%
€1m - €2.49m	21	24%
€2.5m +	28	32%
Total	88	100%



The geographic distribution of respondents by scale of revenue underlines the extent to which larger attractions in turnover terms are located in Dublin. Thus, just 30% of respondents in Dublin earn less than €1m, whereas 52% of attractions outside Dublin fall into this category. At the other end of the scale, 52% of Dublin-based respondents earn more than €2.5m compared to 22% of those outside Dublin.

Figure 3.2: Distribution of Respondents by Revenue – Dublin vs Non-Dublin



3.2 Distribution of Revenue by Source

The distribution of revenue by source is shown in Figure 3.3. Note that the funding of National Cultural Institutions is not included in this chart as the bulk of their revenue comes from the State and inclusion of this funding would distort the analysis which is representative of the majority of respondents.

In 2023, ticket sales accounted for an average of 53% of revenue, followed by retail at 23% and F&B sales at 10%. All other sources are minor by comparison. While there is some variation around the average distribution shown in Figure 3.3, it provides a good representative figure.

Figure 3.3: Distribution of Revenue by Source

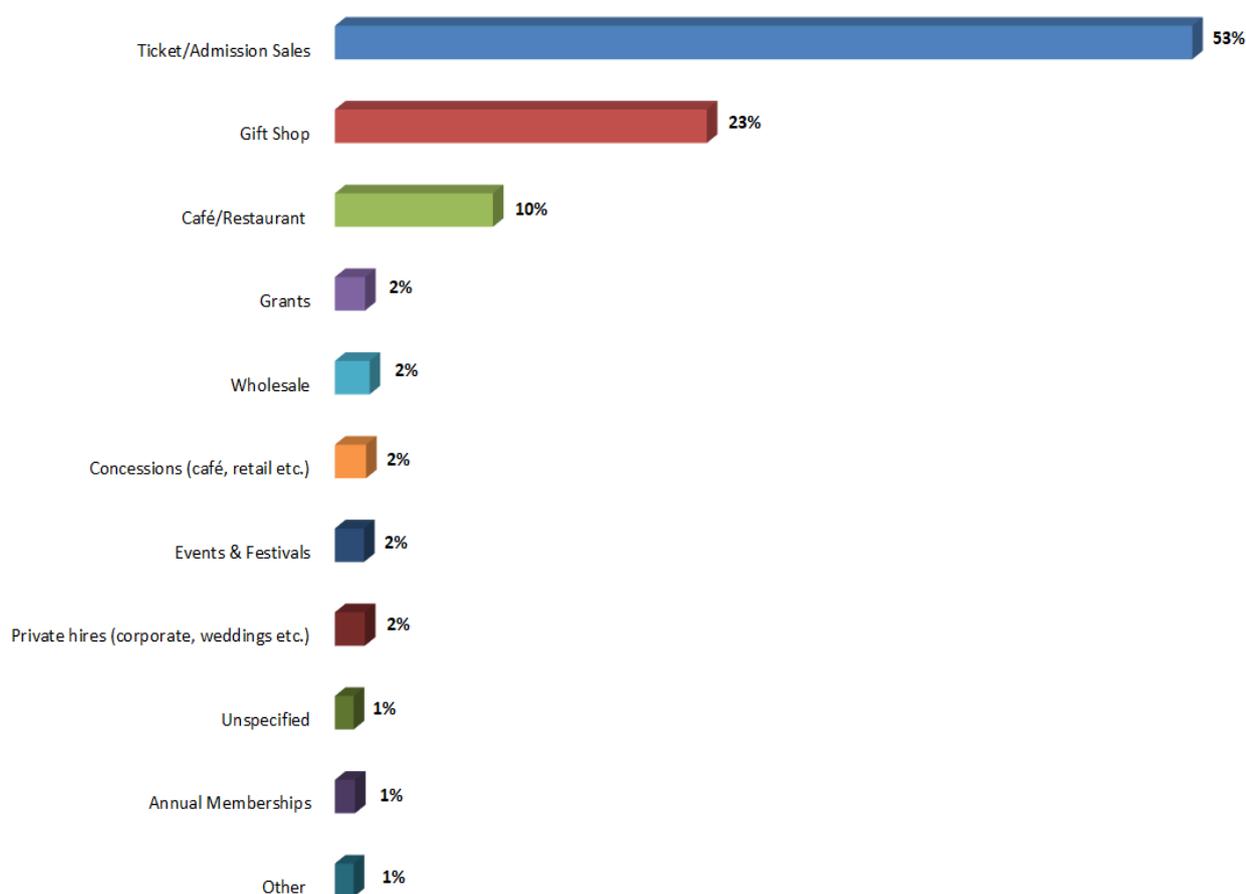
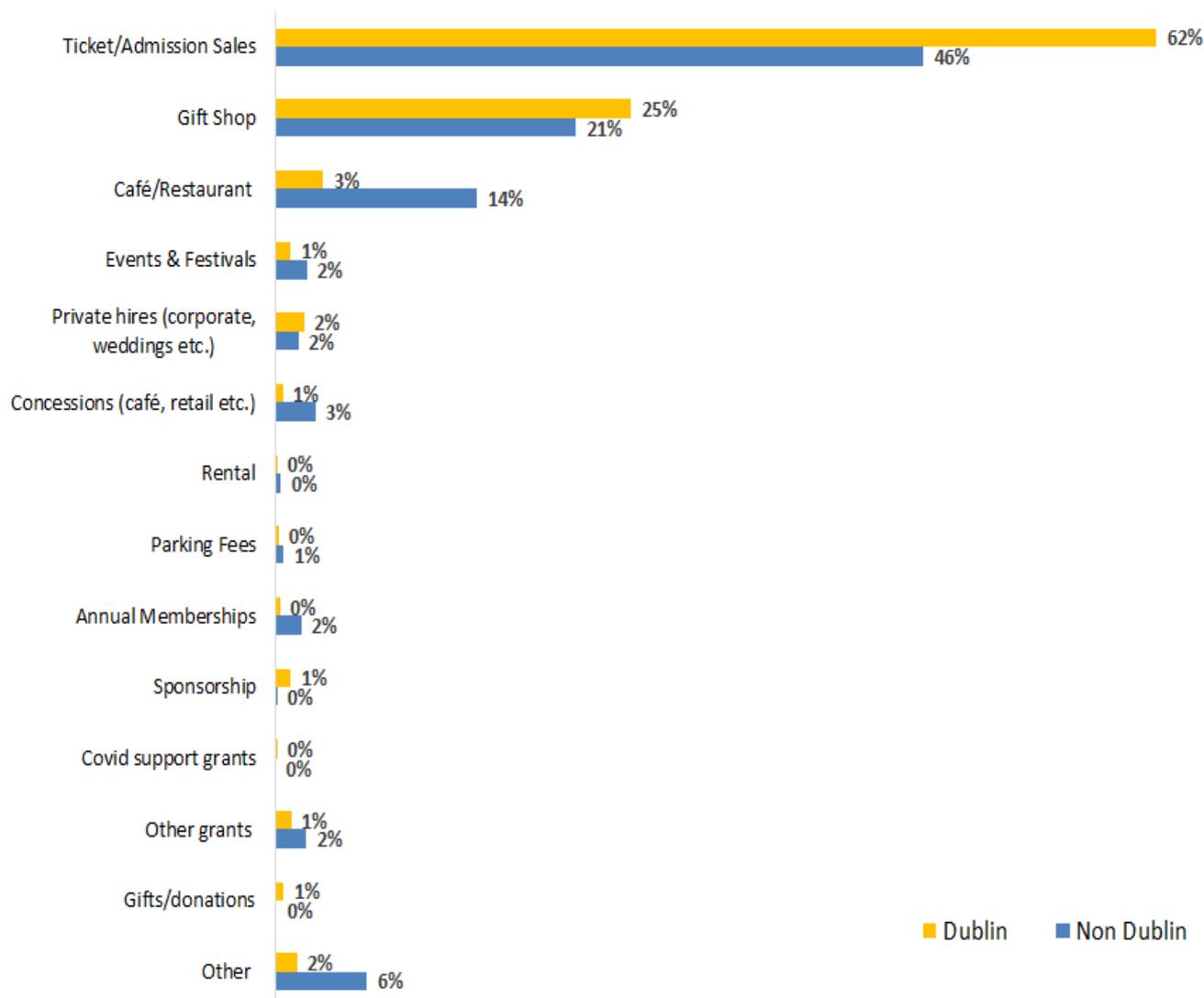


Figure 3.4: Distribution of Revenue by Source – Dublin vs Non-Dublin



Sites outside Dublin had some significant differences in their income profile compared to those in Dublin. The average share of revenue earned from ticket sales was much lower outside Dublin (46% compared to 62%) while food and beverage sales made a much larger contribution – 14% compared to 3% in Dublin. Cafes are a more important feature for attractions outside Dublin – many sites in Dublin don’t have one as there typically are plenty of options for tourists in the surrounding area.

Table 1: Distribution of Revenue by Source and Category of Attraction

	Historic Sites	Visitor Heritage Centre/ Museum/Gallery	Brand Experience	Other
Ticket/Admission Sales	52%	41%	48%	65%
Gift Shop	20%	21%	42%	6%
Café/Restaurant	12%	11%	7%	9%
Events & Festivals	2%	3%	1%	2%
Private hires	1%	5%	1%	2%
Concessions (café, retail etc.)	1%	1%	0%	6%
Rental	0%	1%	0%	0%
Parking Fees	1%	1%	0%	1%
Annual Memberships	1%	1%	0%	3%
Sponsorship	0%	3%	0%	0%
Grants	1%	9%	0%	1%
Gifts/donations	0%	1%	0%	0%
Other	1%	1%	0%	3%
Unspecified	2%	1%	1%	0%
Wholesale	7%	1%	0%	0%
	100%	100%	100%	100%

The distribution of respondents by category in this Table is as follows (85 respondents provided a detailed breakdown of expenditure):

- Historic Sites - 22 respondents
- Visitor Heritage Centre/Museum/Gallery - 31 respondents
- Brand Experience - 15 respondents
- Other - 17 respondents

‘Other’ includes visitor gardens, observatories, farms, natural attractions, heritage parks, leisure & theme parks.

As with Figures 3.3 and 3.4, the grant funding of National Cultural Institutions is not included in the breakdown in Table 1. Historic Sites and Other attractions rely heavily on revenue from ticket sales with retail and food & beverage sales also contributing significant income. Heritage Centres, Museums and Galleries have a similar reliance, but grants make a significant contribution. As might be expected, Brand Experiences generate most of their revenue (90%) from ticket sales and retail.

3.3 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.

The results are provided in Tables 2, 3 and 4 below. All figures stated are net of VAT. Note that brand experiences are not included in this analysis as their retail sales tend to be significantly higher than those for other attractions.

Table 2: Average Ticket, Retail and Food & Beverage Sales per Visitor, net of VAT

Average Ticket Price, € 11.32	Average Retail Spend, € 4.70	Average F&B Spend, € 6.70
Median Ticket Price, € 9.66	Median Retail Spend, € 2.70	Median F&B Spend, € 4.51

The median values for respondents are also included in Table 2. The median is the central value in a set of data and therefore, for many attractions, would be a more representative value than the mathematical average which can be affected by a small number of unusually high or low figures. The median value for retail is a little over half the average value while the median value for F&B is almost 70% of the average value indicating a lower spread of values among respondents.

The data in Table 2 show that there is, potentially, an average of up to around €23 per visitor, net of VAT, to be earned by attractions from ticket sales, retail and food & beverage. (The cumulative median value is €16.87.) Minor additional revenue sources, such as events, festivals, rentals, parking etc. would add to this.

Overall, there was an increase of just over 5% in average ticket prices over 2022 while the retail spend per head fell by 8%. The largest increase was in average food and beverage sales per visitor which rose by 24% in 2024. The difference in sample sizes probably contributed to some of the difference but increased food & beverage prices due to increased costs may have been a more significant factor.

As shown in Table 3, average ticket prices were 18% higher in Dublin than at sites outside Dublin, and the median value was almost 21% higher in Dublin. Average retail spend per visitor was 25% higher in Dublin than elsewhere but, in a reverse from 2022, the median value of retail sales per visitor was a little higher outside Dublin. Average F&B yields are also a little higher outside Dublin, with the difference in the median value being much greater.

**Table 3: Average Ticket, Retail and Food & Beverage Sales per Visitor
 – Dublin vs Non-Dublin**

	Average Ticket Price, €	Average Retail Spend, €	Average F&B Spend, €
Dublin	12.80	5.52	6.56
Non-Dublin	10.85	4.42	6.74
	Median Ticket Price, €	Median Retail Spend, €	Median F&B Spend, €
Dublin	11.47	2.61	3.53
Non-Dublin	9.50	2.80	4.92

Table 4 overleaf shows that attractions receiving more than 100,000 visitors have higher average ticket and retail yields than sites receiving fewer than 100,000 visitors, but the opposite is the case with food & beverage sales.

**Table 4: Average Ticket, Retail and Food & Beverage Sales per Visitor
- 100,000 or fewer visitors vs more than 100,000 visitors**

	Average Ticket Price, €	Average Retail Spend, €	Average F&B Spend, €
100,000 or fewer visitors	11.24	4.52	6.95
More than 100,000 visitors	11.44	5.06	6.40
	Median Ticket Price, €	Median Retail Spend, €	Median F&B Spend, €
100,000 or fewer visitors	9.23	2.63	4.52
More than 100,000 visitors	9.70	3.01	4.36

**Table 5: Average Ticket, Retail and Food & Beverage Sales per Visitor
- by Category of Attraction**

	Historic Sites €	Visitor Heritage Centre/ Museum/Gallery €	Brand Experience €	Other €
Ticketing (av. price)	8.39	10.79	18.24	12.41
Retail sales (av. spend)	6.68	5.46	30.88	2.91
Café/restaurant (av. spend)	4.34	6.07	13.00	4.80

The distribution of respondents by category in Table 5 above is as follows:

- Historic Sites – 26 respondents
- Visitor Heritage Centre/Museum/Gallery – 22 respondents
- Brand Experience – 10 respondents
- Other – 17 respondents

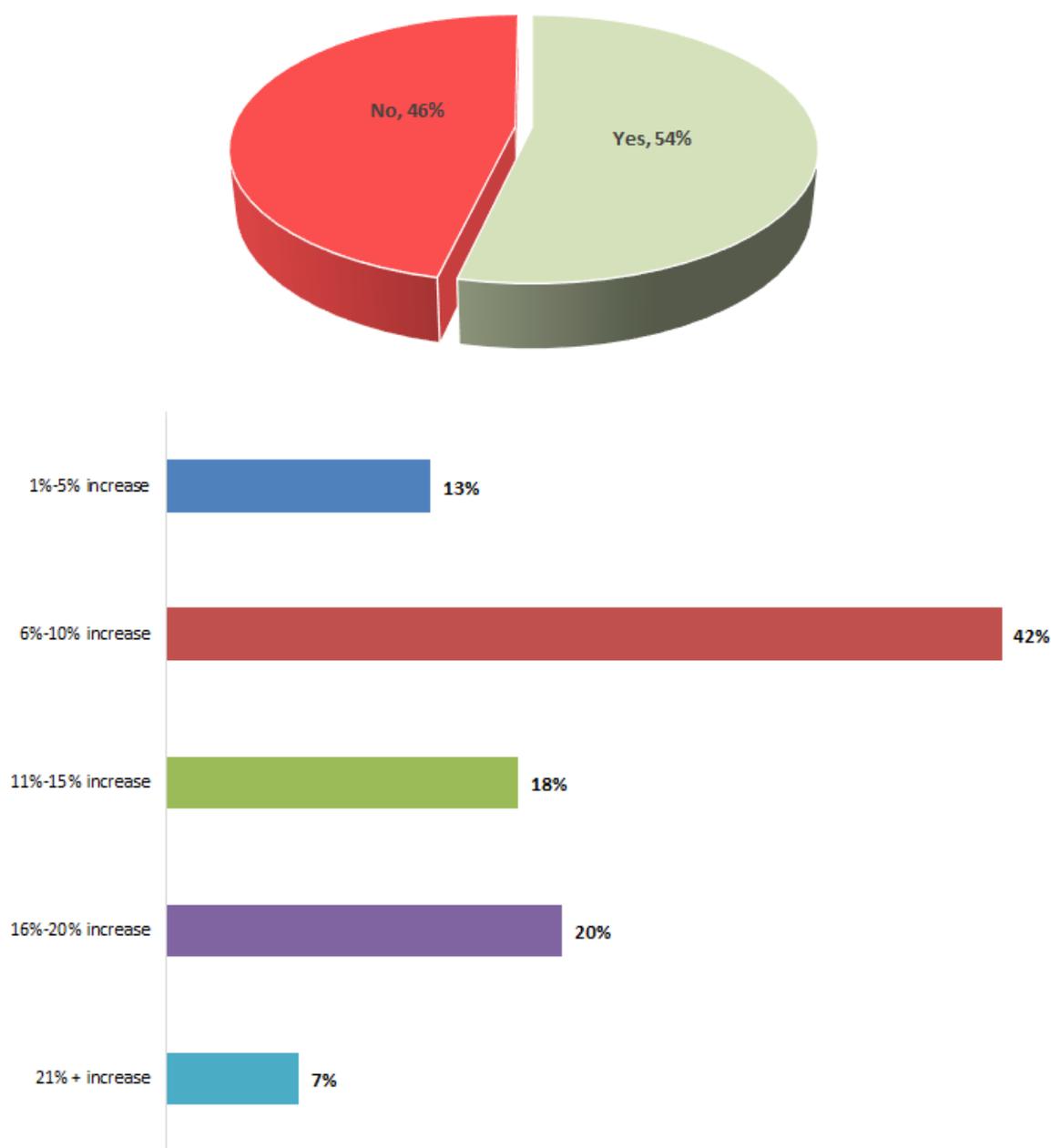
‘Other’ includes visitor gardens, observatories, open farms, natural attractions, heritage park, leisure & theme parks.

As shown in Table 5, Historic Sites have the lowest average sales per visitor for ticketing and food & beverage sales while Brand Experiences have by far the highest.

3.4 Ticket Price Increases

Just over half (54%) of respondents said they had increased their ticket prices in 2023 with the balance saying they had kept prices the same. Of those who did increase their ticket prices, 55% increased them by less than 10%, and the overall weighted average was 11.5%.

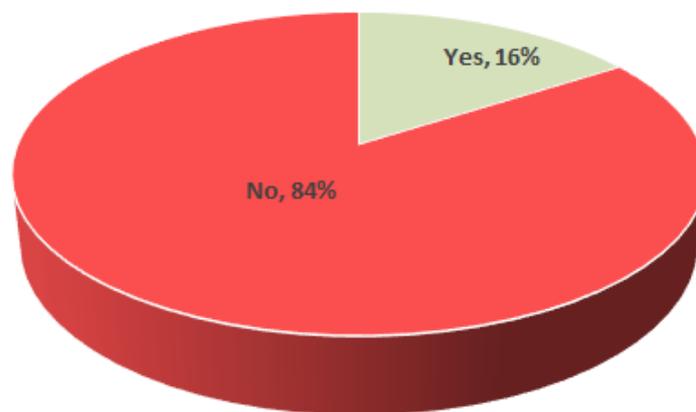
Figure 3.5: Ticket Price Increases



3.5 Variable Pricing

The majority (84%) of respondents said that they did not vary their pricing in response to demand peaks and troughs (e.g., higher prices for peak hours/days/months) with only 16% respondents stating that they did. Almost all of the latter are in Dublin.

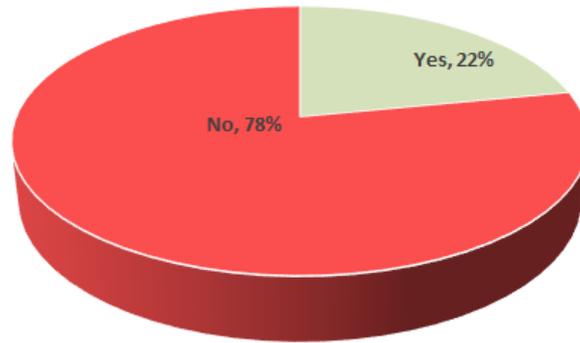
Figure 3.6: Variable Pricing



3.6 Annual Membership Retention Rate

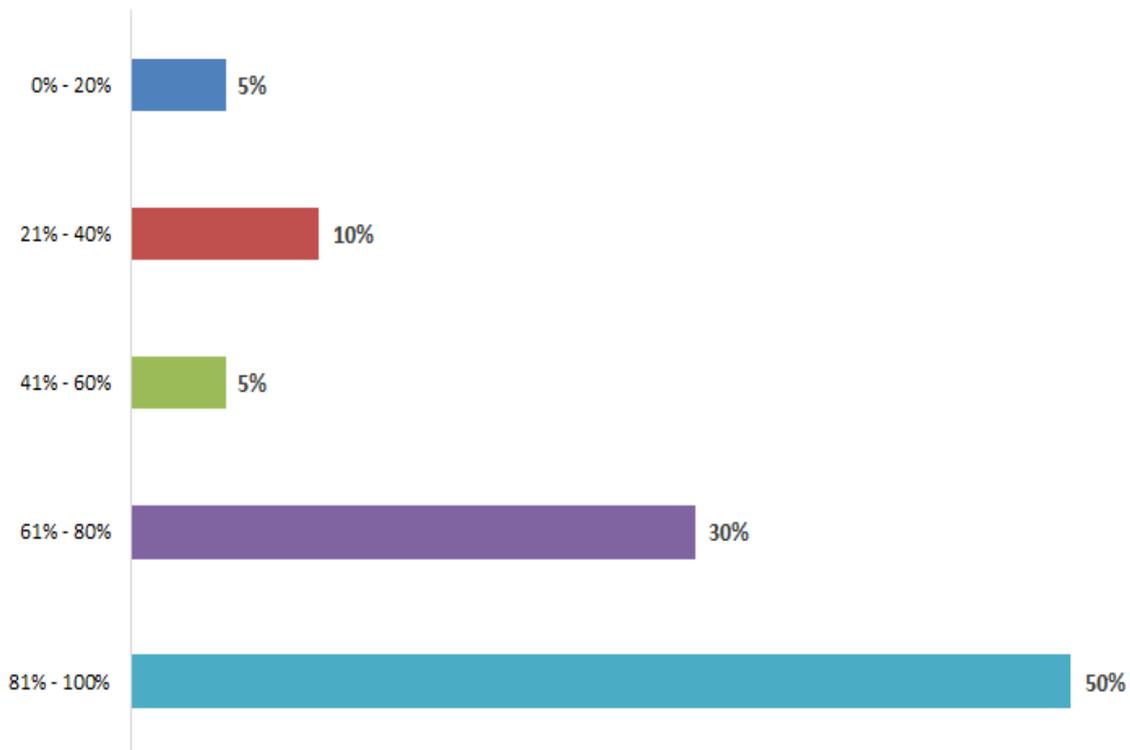
Just over a fifth (22%) of respondents said that they sold annual membership.

Figure 3.7: Percentage of Sites offering Membership



Of those offering memberships, the retention rates are high, with half of these sites retaining at least 80% of their members from year to year.

Figure 3.8: Annual Membership Retention Rate

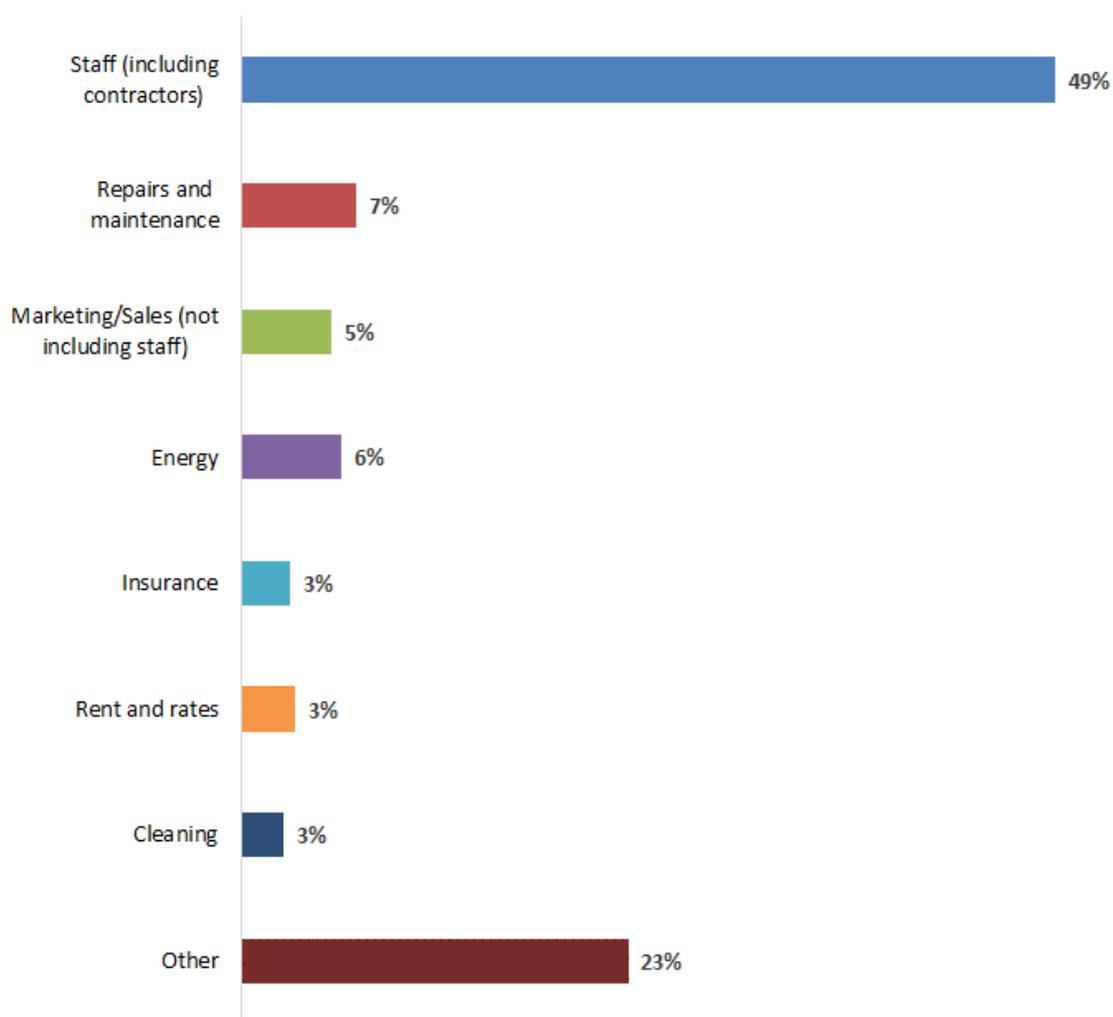


3.7 Breakdown of Operating Expenditure

A broad breakdown of operating costs was sought from respondents - staff (including contractors), marketing and sales (excluding staff), energy, insurance, rent and rates, repairs and maintenance, cleaning and other operating costs. The results are shown in Figure 3.8.

Staff costs are the largest single item (49%), followed by repairs and maintenance and energy. 'Other' covers numerous other costs including bank charges, training, recruitment, other utilities, equipment, legal, audit and archive fees, IT and computer costs, security, travel & subsistence, research and management, admin costs, professional fees etc.

Figure 3.9: Breakdown of Operating Expenditure



The majority of respondents reported an insurance cost range of between 1%-7% share of operating costs. A small percentage of sites are paying substantially more, amounting to as much as a 10%-16% share of total costs.

As shown in Figures 3.10 and 3.11, location and relative popularity have little impact on the distribution of operating costs by function.

Figure 3.10: Breakdown of Operating Expenditure – Dublin vs Non-Dublin

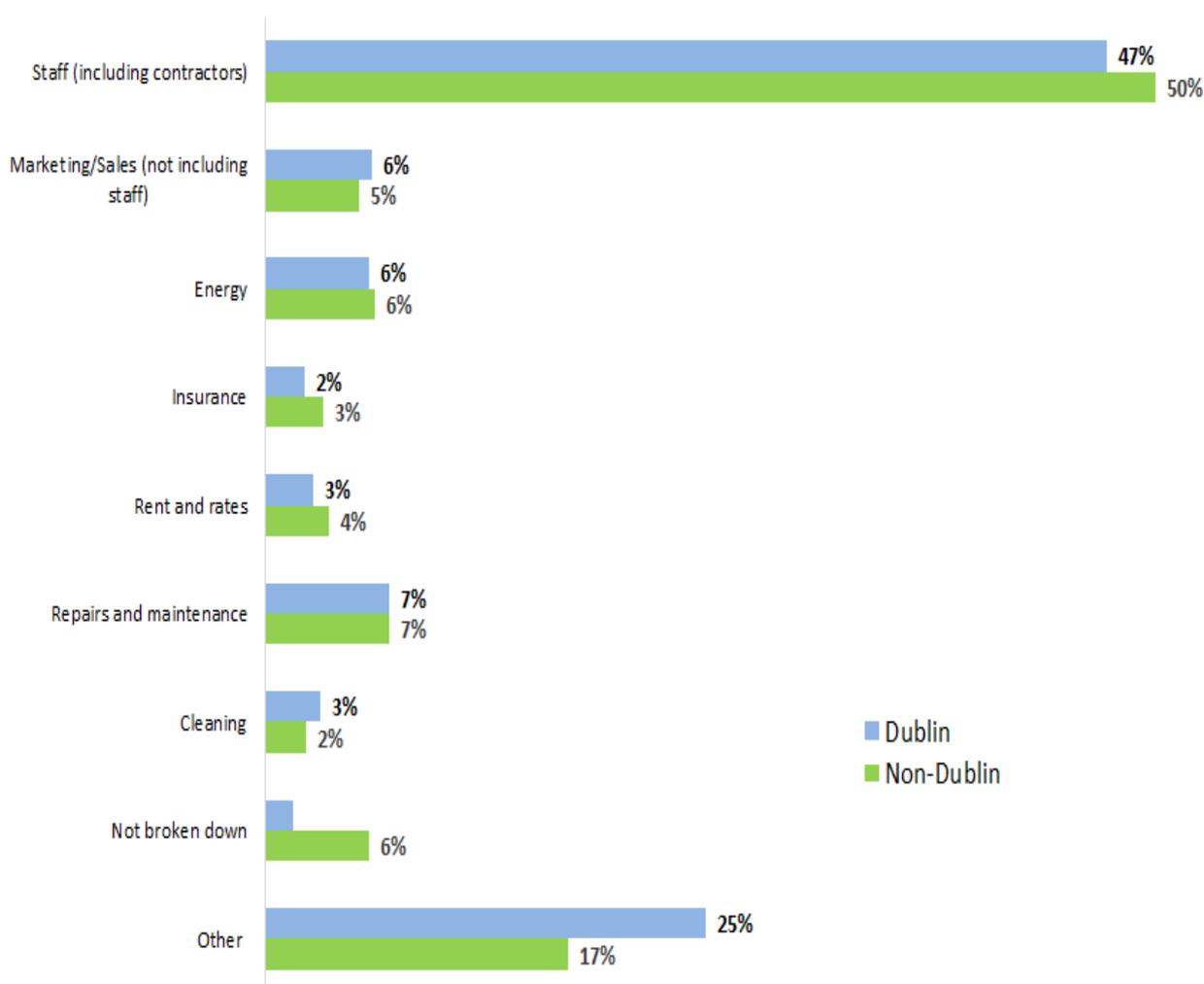
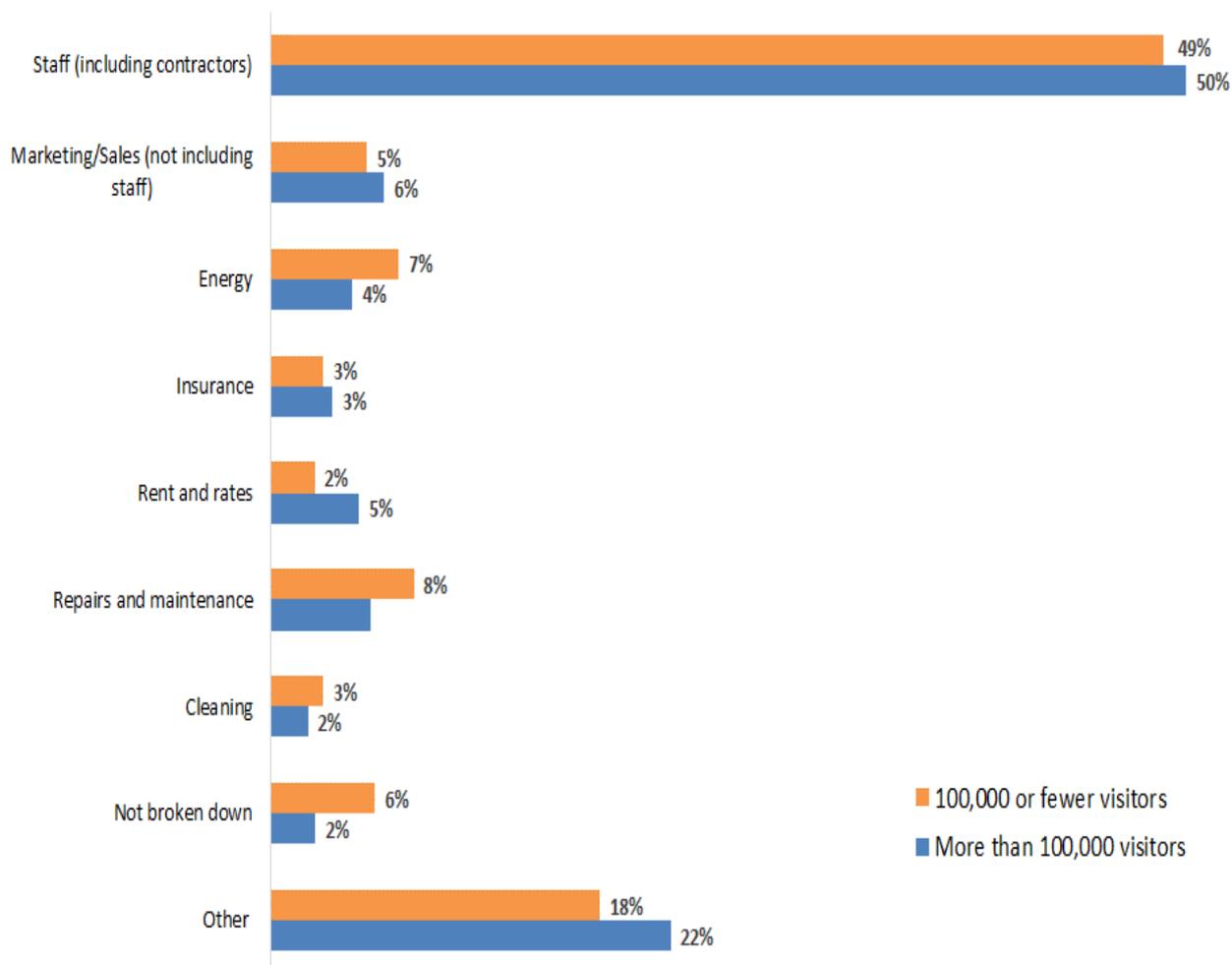


Figure 3.11: Breakdown of Operating Expenditure
 – 100,000 or fewer visitors vs more than 100,000 visitors



3.8 Insurance Renewal

The majority (81%) of respondents reported changes to their insurance renewal rates in 2023. Of these, almost all (96%) reported increases in their rates, with only 4% reporting a decrease. Of those who reported a rise in insurance premiums, almost three-quarters reported increases of between 1% and 15%. The average increase was about 12%. At the other end of the scale, one-fifth of respondents to this question reported increases of 21% or more – in a small number of cases, the increases exceeded 50%.

Figure 3.12: Insurance Renewal – price change

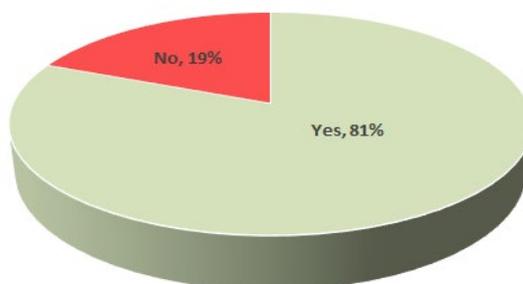
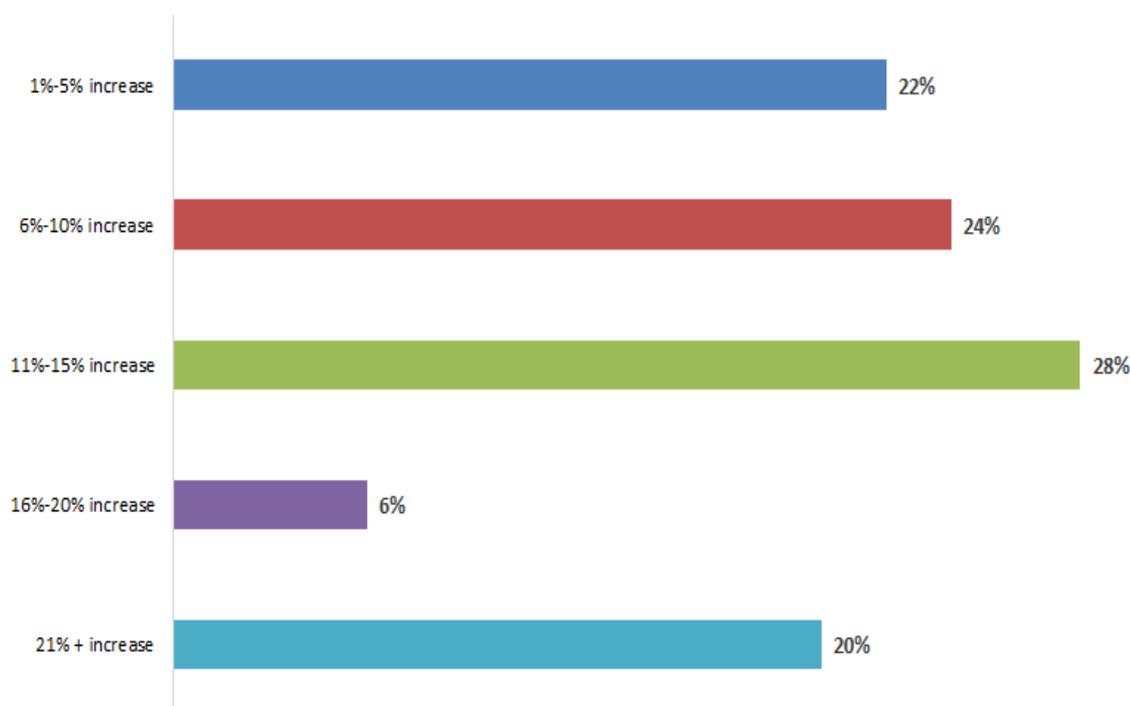


Figure 3.13: Insurance Renewal – price change



4. VISITORS

4.1 Number of Visitors Received in 2023

The total number of in-person visitors received by respondents in 2023 amounted to just over **18.1 million** (18,118,937). Overall, AVEA’s members, including non-respondents, received an estimated 19.6 million visitors in 2023 which represents about 53% of visits to all attractions in Ireland.

The total in 2023 was a considerable increase over the 13.3 million visitors recorded for 2022, but below the peak of 22.9 million in 2019. While the composition of the sample of respondents is different, there was a much larger number of respondents to the 2023 survey (96 vs. 77) which suggests that visitor numbers at most sites have yet to return to 2019 levels.

Some 55 attractions responded to both the 2019 and 2023 surveys, and their figures show that the number of visitors they received in 2023 was 6% below their 2019 total. This was a strong performance given that Ireland’s inbound tourist numbers in 2023 were about 35% below that recorded in 2019.

The distribution of survey respondents by scale of visitation in 2023 is shown in Table 6 below and Figure 4.1 overleaf:

Table 6: Distribution of Survey Respondents by Scale of Visitation

Visitors	No. of Sites	%
Up to 49,999	37	39%
50,000 -110,000	20	21%
110,000 - 249,999	18	19%
250,000 - 499,000	11	11%
500,000+	10	10%
Total	96	100%

Figure 4.1: Distribution of Respondents by Scale of Visitation

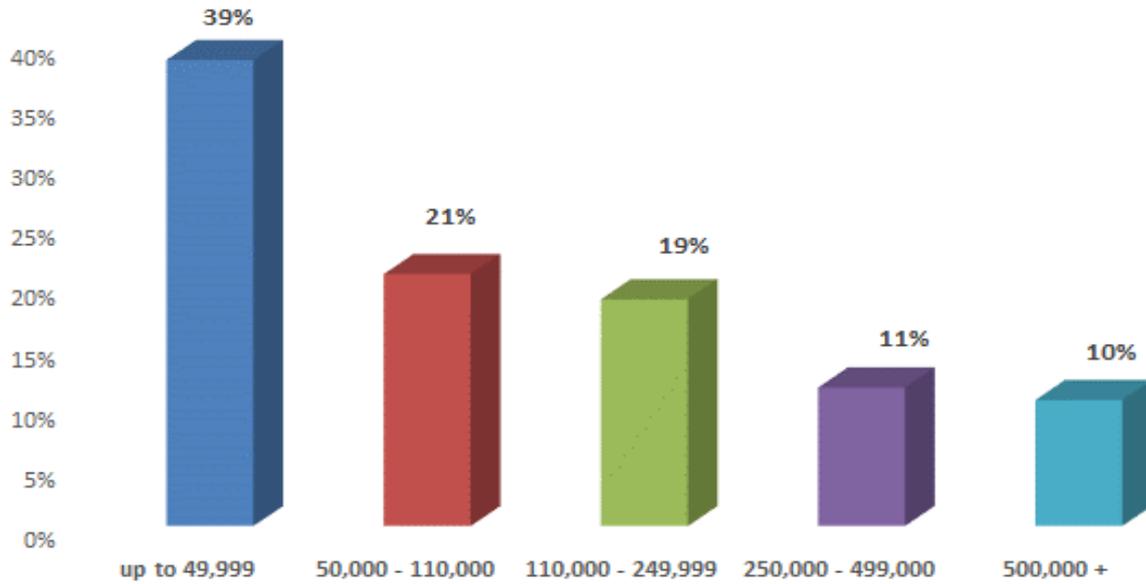
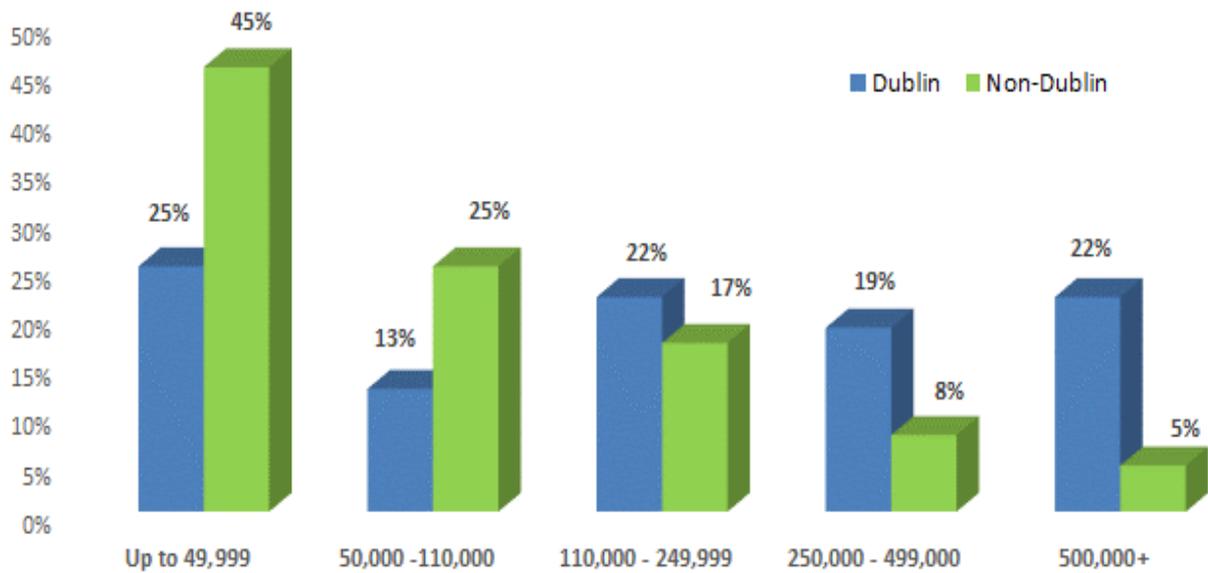


Figure 4.2: Distribution of Respondents by Scale of Visitation – Dublin vs Non-Dublin



4.2 Origin of Visitors

The origin of visitors received by respondents in 2023 is detailed in Figure 4.3.

The rank order of source markets in terms of admissions is essentially the same as in previous years. However, the share accounted for by the domestic market (including Northern Ireland) fell from 43% in 2022 to 34% in 2023 which is illustrative of the improved performance of inbound tourism in 2023, especially the North American market. It also suggests some weakening in domestic demand as the absolute numbers Irish visitors and Northern Irish visitors over 96 sites in 2023 were almost the same as those over 78 sites in 2022.

North America continued to be the second most important source of admissions for 2023 after the domestic market, followed by Britain.

Figure 4.3: Origin of Visitors by Source Market

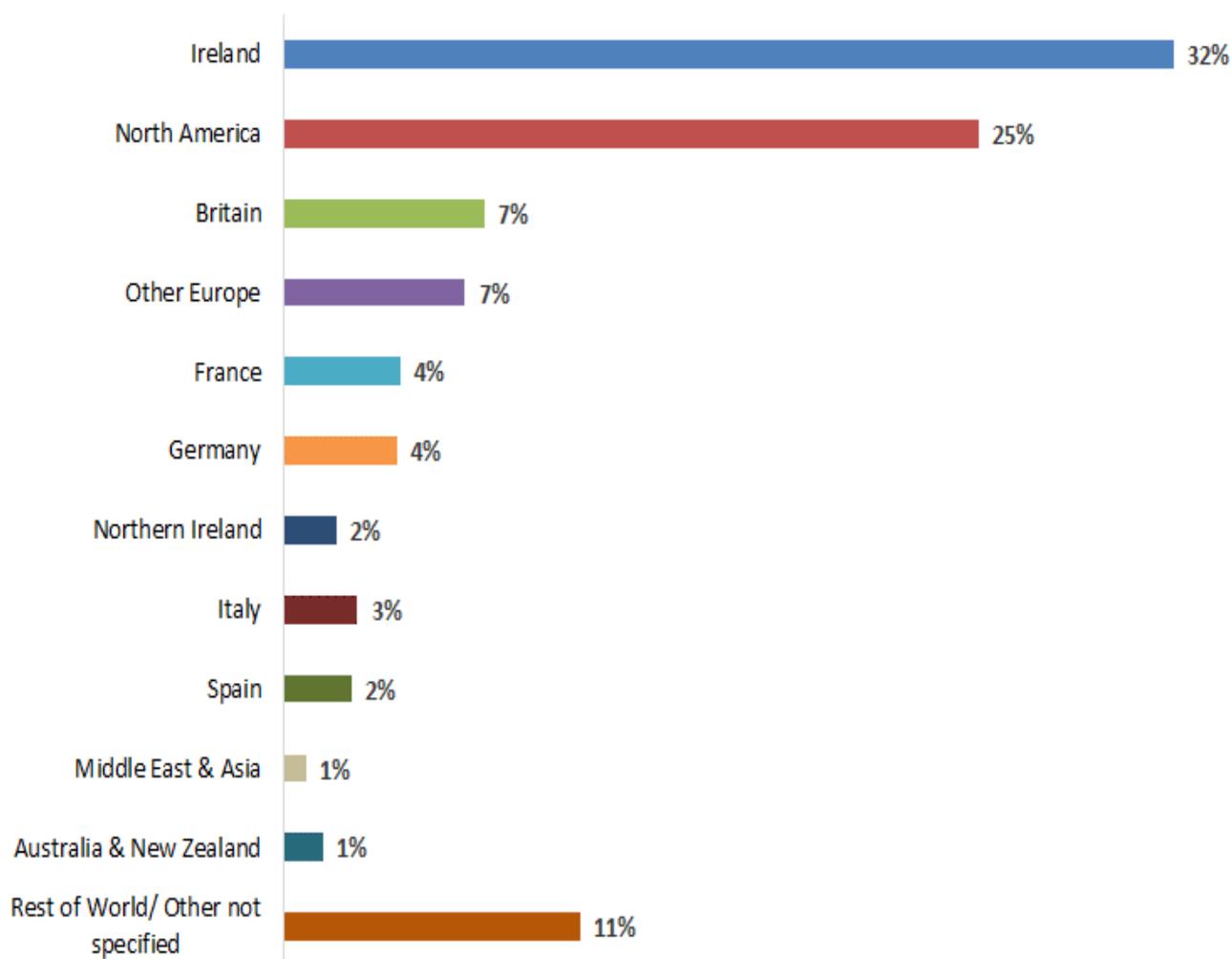


Figure 4.4 shows that attractions outside Dublin have a much higher dependency on the domestic market although, in 2023, this was also (by a small margin over North America) the largest market for Dublin attractions. On the other hand, attractions in Dublin received higher proportions of visitors from Britain, Other Europe, France, Italy and Spain than is the case for attractions outside Dublin. In 2019, North America was the largest source of demand for attractions in Dublin at 28% followed by the domestic market at 21%.

Figure 4.4: Origin of Visitors by Source Market – Dublin vs Non-Dublin

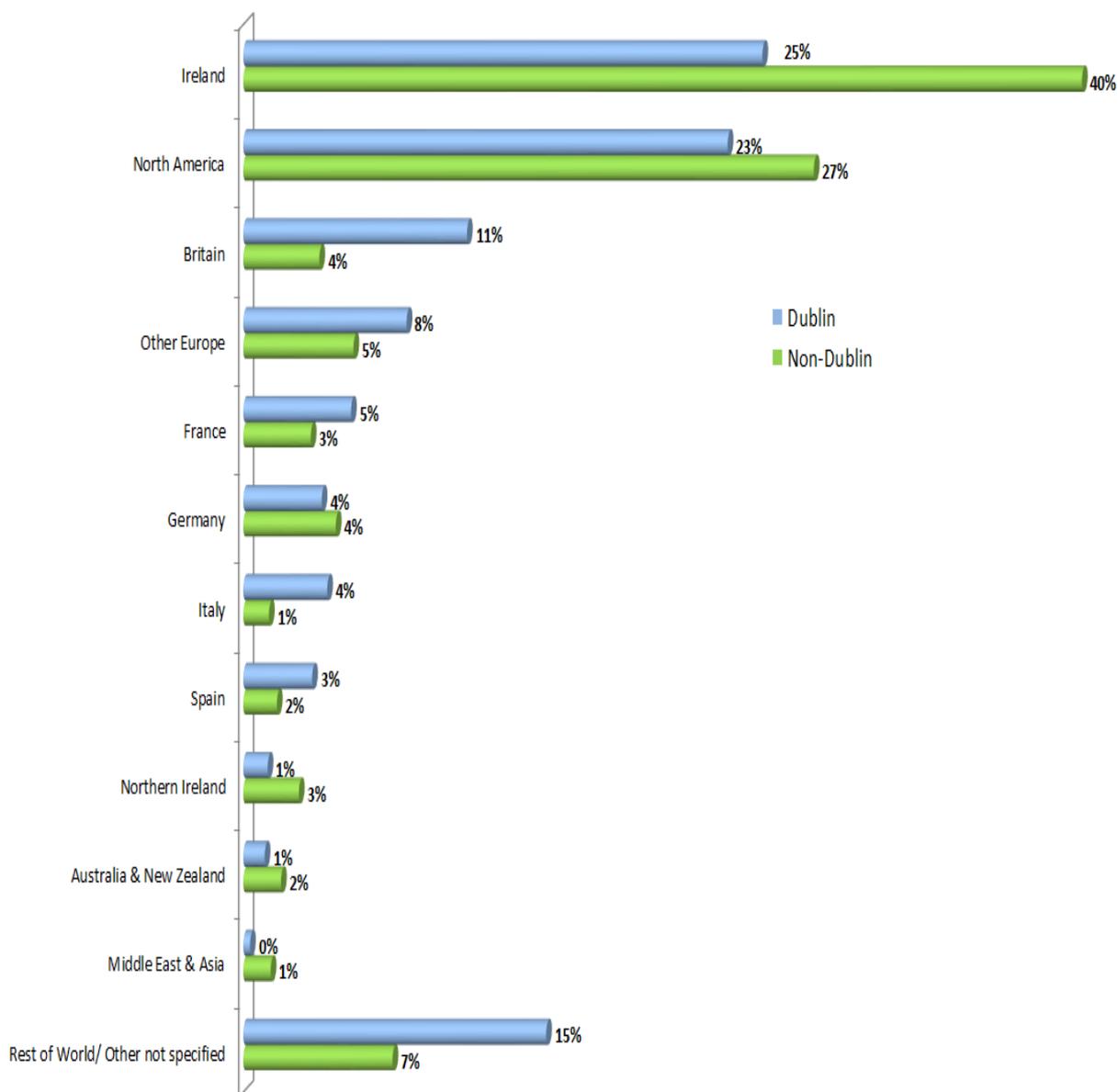


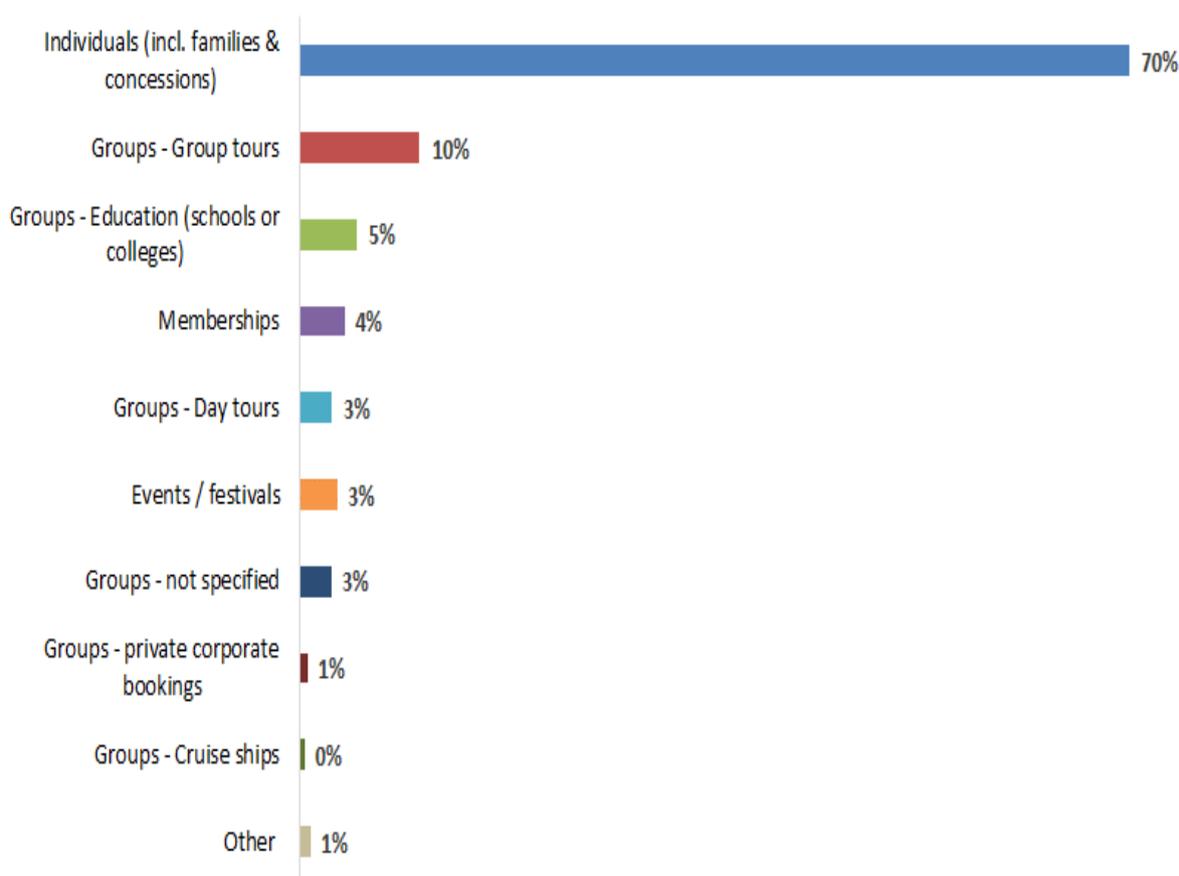
Table 7: Origin of Visitors by Source Market – by Category of Attraction

Markets	Historic Sites	Visitor Heritage Centre/ Museum/Gallery	Brand Experience	Other
Ireland	28%	38%	16%	44%
North America	27%	14%	35%	28%
Britain	5%	6%	20%	2%
Other Europe	8%	5%	6%	7%
France	6%	3%	5%	2%
Germany	5%	3%	4%	3%
Northern Ireland	4%	3%	2%	1%
Italy	3%	2%	2%	2%
Spain	2%	4%	0%	1%
Middle East & Asia	1%	1%	1%	3%
Australia & New Zealand	0%	0%	0%	2%
Other not specified/not given	10%	21%	7%	4%
	100%	100%	100%	100%

Table 7 above shows that the distribution of demand by source market is broadly consistent across the main categories of attraction with the exception of Brand Experiences for which North America is by far the largest source market. The domestic market is the principal source for other categories although North America is almost as important for Historic Sites.

4.3 Visitor Ticket Categories

Figure 4.5: Distribution of Admissions by Ticket Category

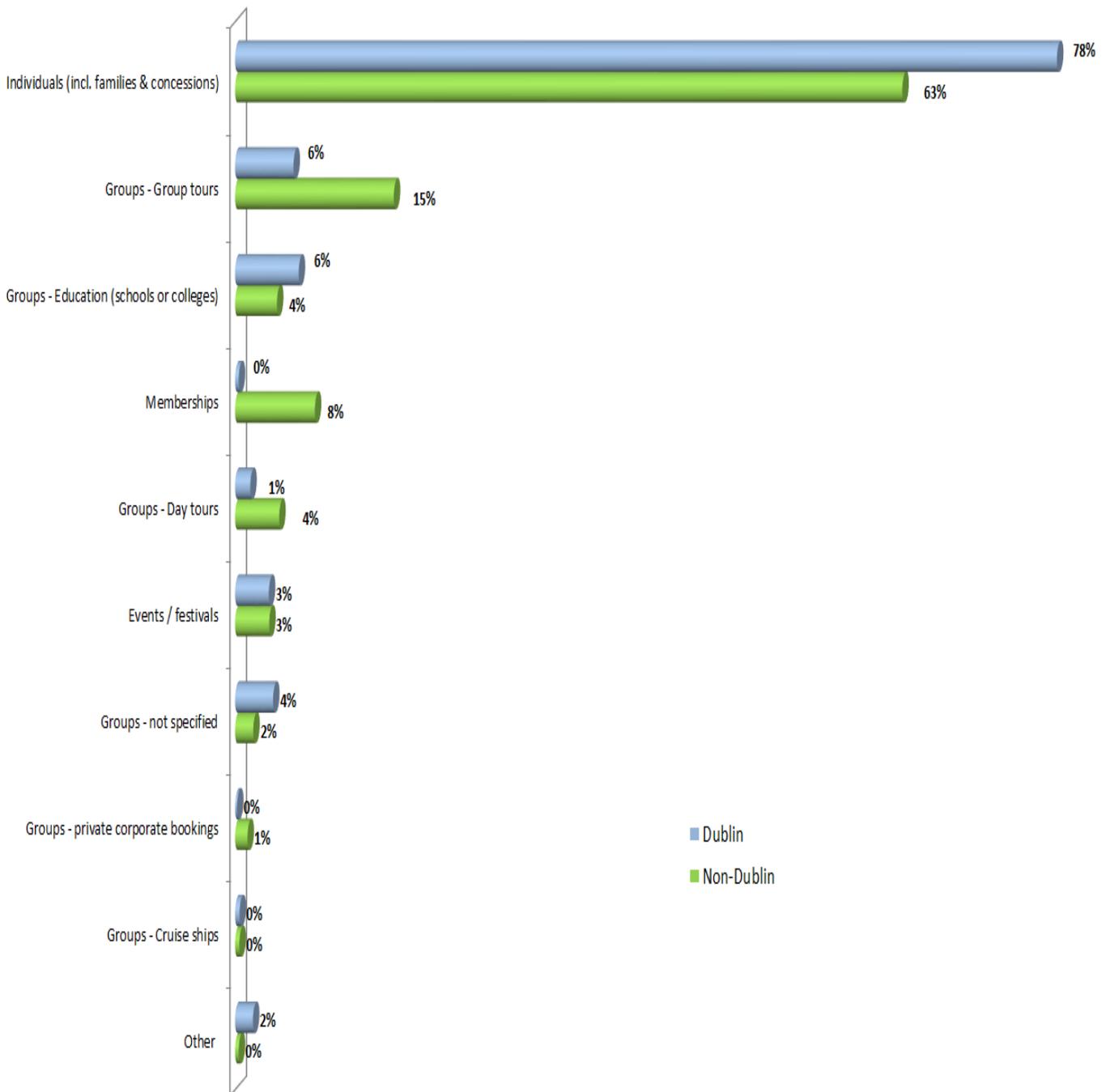


7 out of every 10 admissions to respondent attractions in 2023 purchased individual tickets. Not all were at full price - this category includes concessions (students, pensioners, etc.), families and children.

The results for 2023 showed a slight decrease in the share of group admissions in 2023 over 2022 with total group admissions in 2023 accounting for some 22% of admissions as against 25% of admissions in 2022. The corresponding figure for group admissions in 2019 was 26%.

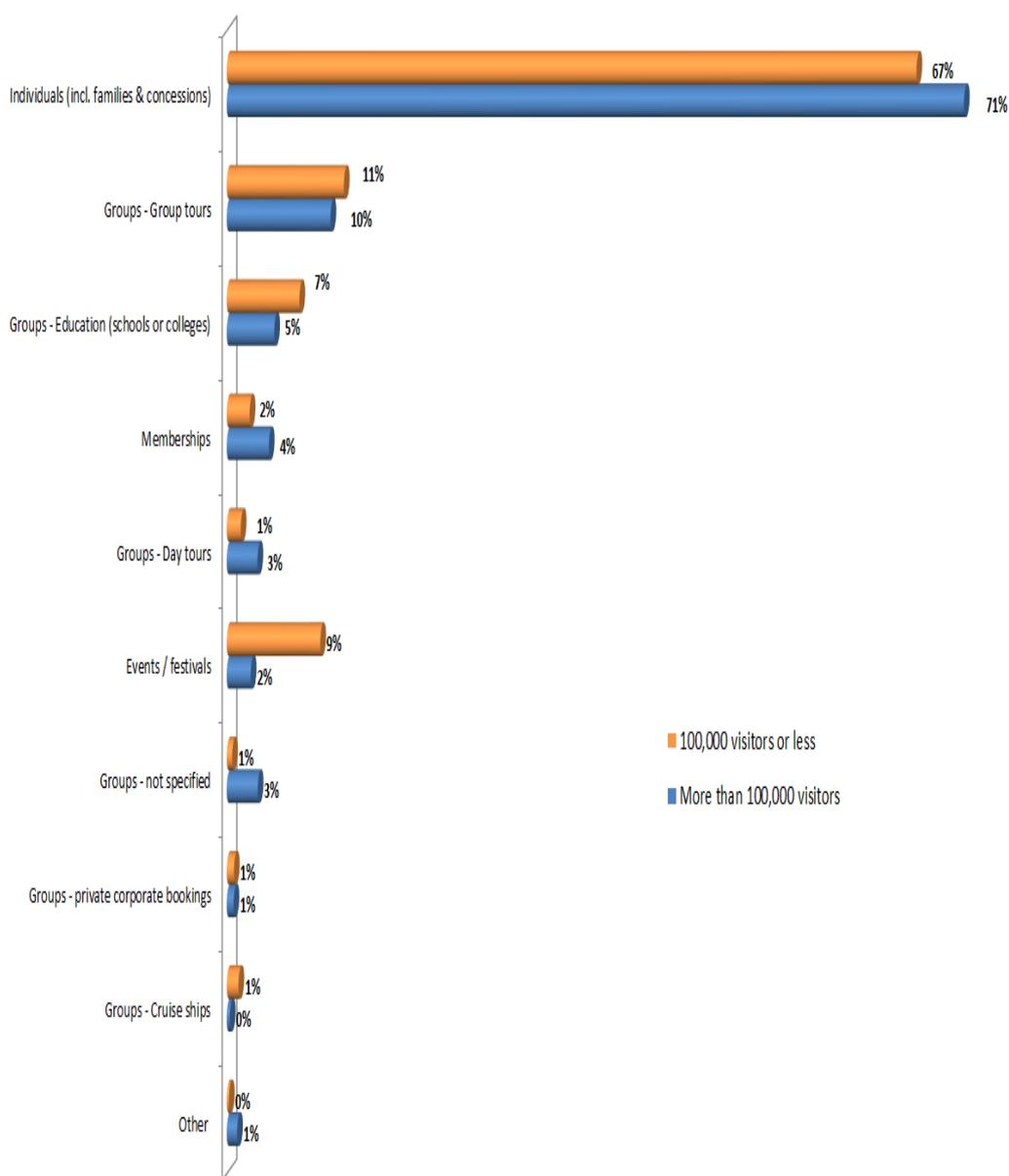
Groups are far more significant as a share of total admissions outside Dublin, at 26% compared to 17% in Dublin. Memberships are also more important as a source of admissions for attractions outside Dublin.

Figure 4.6: Distribution of Admissions by Ticket Category
 – Dublin vs Non-Dublin



The distribution of admissions by ticket category is broadly the same for attractions receiving more than 100,000 visitors as for those receiving 100,000 or fewer visitors. Among the minor ticket categories, events/festivals are more significant for attractions receiving fewer than 100,000 visitors while memberships are more significant for those receiving more than 100,000 visitors.

Figure 4.7: Distribution of Admissions by Ticket Category
 – 100,000 or fewer visitors vs more than 100,000 visitors



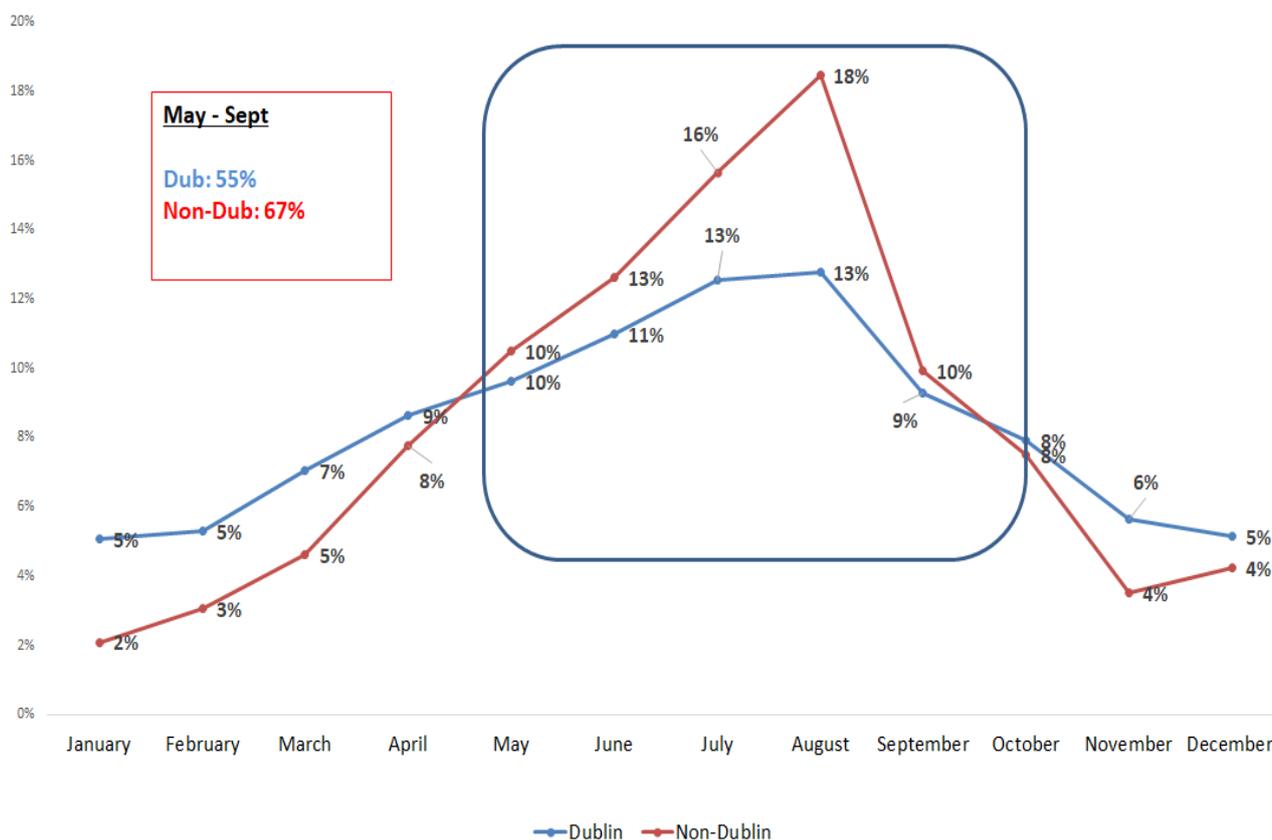
**Table 8: Distribution of Admissions by Ticket Category
 - by Category of Attraction**

Categories	Historic Sites	Visitor Heritage Centre/ Museum/Gallery	Brand Experience	Other
Individuals (incl. families & concessions)	70%	68%	84%	66%
Groups - group tours	10%	10%	5%	14%
Groups -education	2%	13%	2%	3%
Memberships	6%	0%	0%	7%
Events/festivals	5%	5%	1%	1%
Groups - day tours	1%	1%	4%	5%
Groups - cruise ships	1%	1%	0%	0%
Groups - corporate bookings	0%	1%	1%	1%
Groups - not specified	6%	0%	4%	0%
Other	0%	0%	0%	3%
	100%	100%	100%	100%

The distribution of admissions by ticket type and category of attraction is detailed in Table 8 above. While individuals, including families and concessions, dominate in all categories, groups are particularly important for Heritage Centres, Museums & Galleries and Other attractions. Groups are much less significant for Brand Experiences.

4.4 Seasonality

Figure 4.8: Seasonal Distribution of Admissions



The seasonal pattern of admissions reflects the general seasonality of tourism in Ireland. As Figure 4.8 highlights, the seasonal peaking of demand during the summer months is much more pronounced at sites outside Dublin than at those in Dublin. In fact, demand outside Dublin was more seasonally concentrated in 2023 than in 2019 – 47% of visits to attractions outside Dublin in 2023 were in the three months June, July and August compared to just over 40% in 2019.

While this reflects the greater off-peak flows in city break demand, the proportion of demand outside Dublin that was concentrated into the May-September period in 2023 (67%) was higher than in pre-Covid times (e.g. 59% in 2019).

5. YOUR STAFF

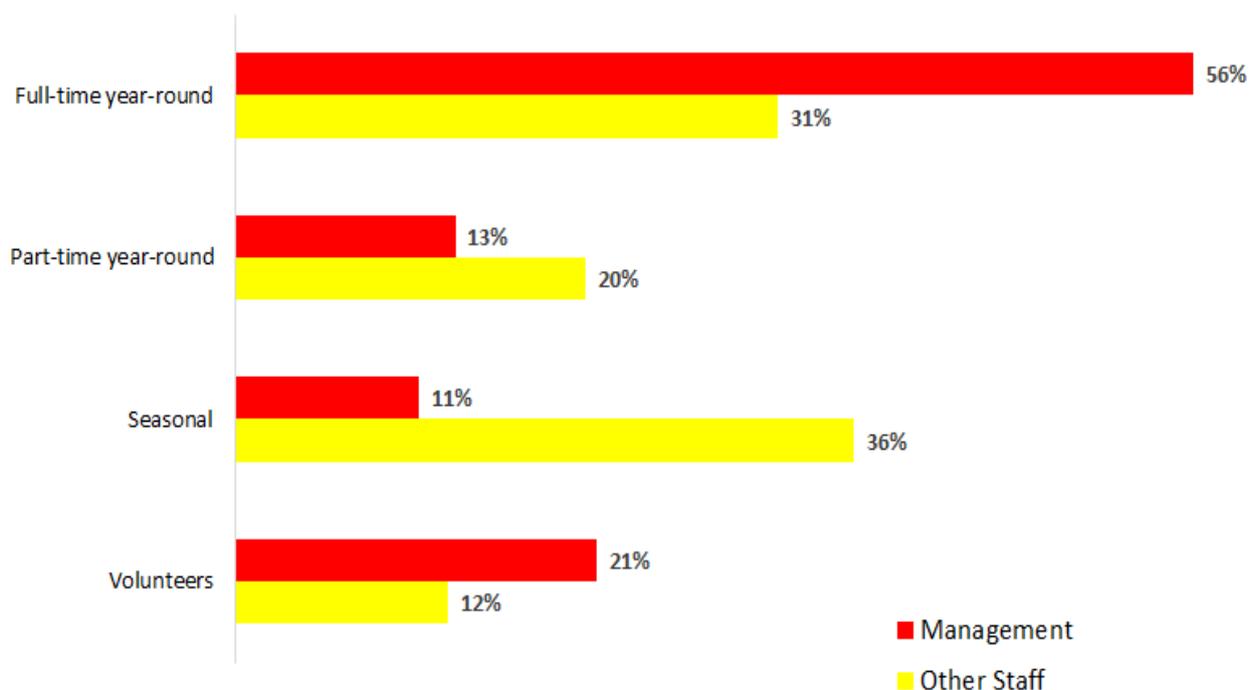
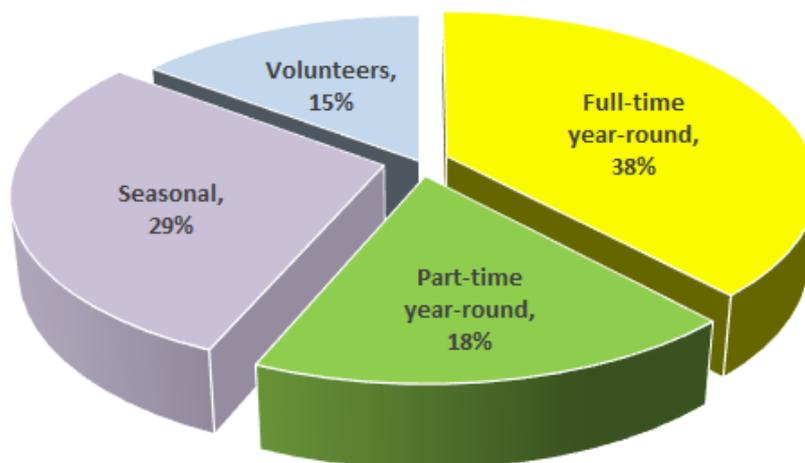
5.1 Number of Staff Employed

90 out of 96 survey respondents answered this question and together employed a total of 5,200 staff in 2023, an average of 57.8 per site. This is up from an average of 50.0 per site in 2022 and also up from an average of 53.2 employees per site recorded in 2019. Based on the average staff: visitor ratio, it is estimated that the 117 AVEA members in 2023 employed over 6,400 staff. Some 38% of these staff are employed on a full-time year-round basis, with the balance divided between part-time year-round (18%), seasonal (29%) and volunteers (15%).

Over half of staff at 'Management' level are employed on a full-time year-round basis, compared to about a third of 'Other Staff'. Over half of 'Other Staff' are employed on a part-time or seasonal basis.

Figure 5.1: Employment at Respondent Attractions

*Total employed by Respondents: 5,200
 (average of 57.8 per site)*



5.2 Principal Obstacles to the Employment of New Staff in 2024

Respondents were asked to identify and rank the principal obstacles to the recruitment of new staff in 2024. The results are shown below with the three leading concerns being level of pay available, a lack of candidates and seasonality of employment. These all reflect a tight labour market and the tight operating budgets of most attractions.

Rank	Obstacle to Recruitment
1	Pay
2	Lack of candidates
3	Seasonality of employment
4	Skill shortages
5	Accommodation for staff
5	Working hours
6	Competition from other tourism businesses

Other issues mentioned included:

- Financial and organisational limitations
- Geographical location issues
- Safety issues, particularly in parts of cities.

Dublin vs Non-Dublin Respondents

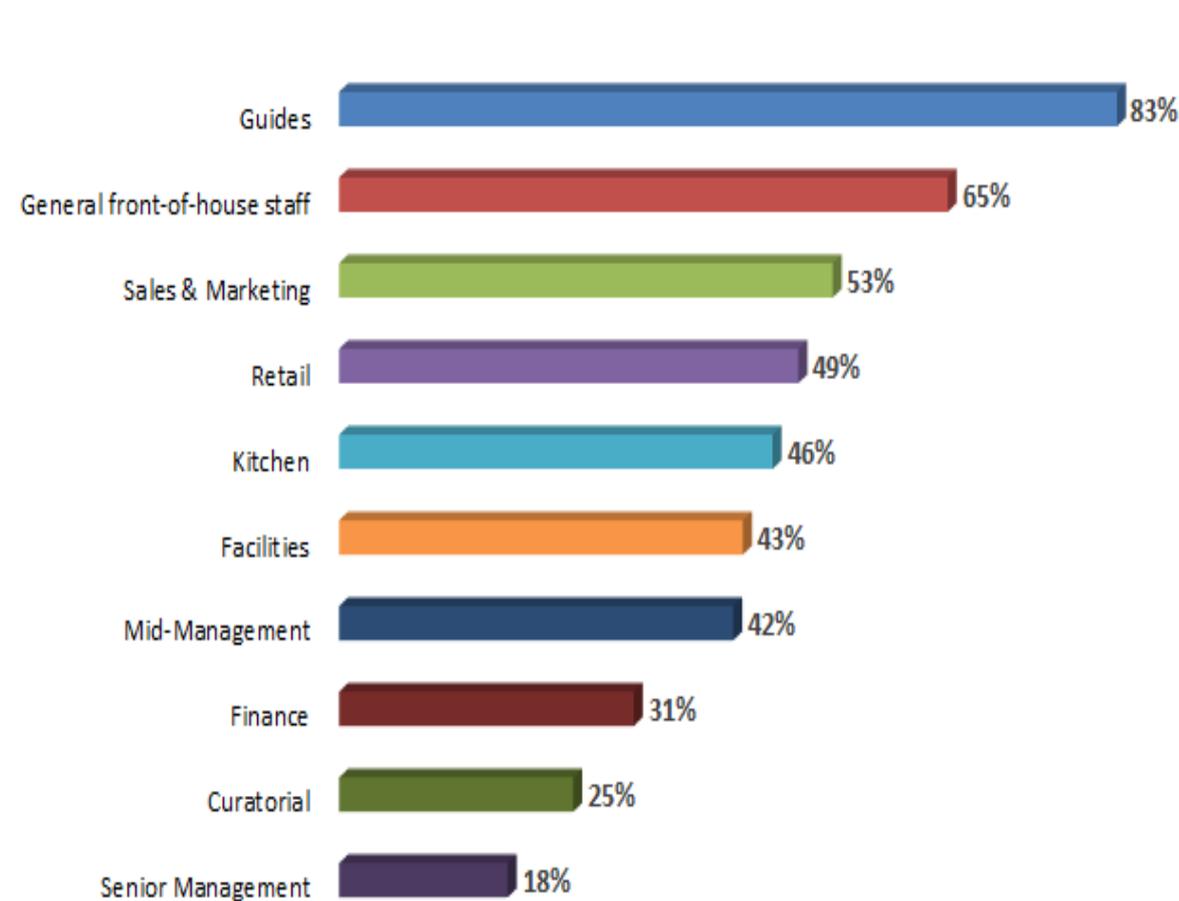
	Dublin Ranking	Non-Dublin Ranking
Pay	1	2
Accommodation for staff	2	6
Lack of candidates	3	1
Skill shortages	4	4
Competition from other tourism businesses	5	7
Seasonality of employment	6	3
Working hours	7	5

When analysed on a Dublin vs Non-Dublin basis, the key difference between the two groups relate to lack of candidates (especially outside Dublin), availability of accommodation for

staff (a major issue in Dublin) and seasonality of employment (a much bigger issue for sites outside Dublin).

5.3 Principal Needs regarding Recruitment of Staff in 2024

As shown in Figure 5.2, there are significant needs in most functions in 2024. The areas of greatest need are at front-of-house - Guides and General Front-of-House staff. High proportions of respondents have experienced difficulties recruiting staff for these positions, as was the case in 2023.



6. STAFF REMUNERATION

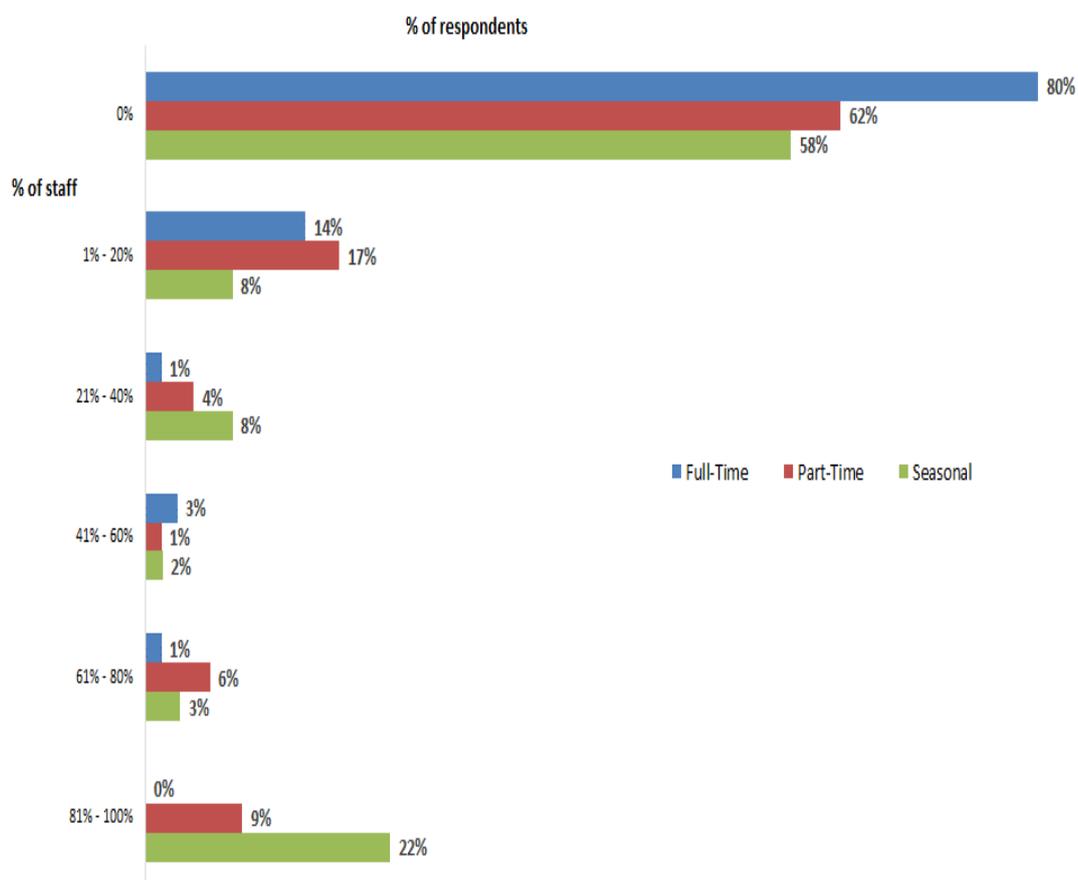
This was the first year that questions were asked in relation to staff remuneration at member attractions. This question received responses from two-thirds of survey respondents.

6.1 National Minimum Wage

Figure 6.1 below indicates that the majority of the 3 categories of staff highlighted are paid above the National Minimum Wage.

As Figure 6.1 shows, seasonal staff are more likely to be on minimum wage.

Figure 6.1: Percentage of Staff on Minimum Wage by % of Respondents



6.2 Hourly Rate of Pay

The range of pay for different categories of staff are shown in Table 9. Respondents were asked to report the ranges of pay for the different categories of staff, and the low and high ends of the ranges are averages based on the number of respondents.

The median or central values among respondents are also shown. The median is the central value in a set of data and therefore, for many attractions, may be a more representative value than the mathematical average which can be affected by a small number of unusually high or low figures.

Table 9: Average Hourly Rate of Pay by Category

	Low End, €	High End, €
Front of house / visitor services staff	13.15	15.06
Guides	13.16	14.63
Maintenance	14.11	17.29
Admin. Assistants	14.60	15.18
Gardeners	13.92	16.23
Team leaders/supervisors	14.42	15.89
	Median Value, Low End €	Median Value, High End €
Front of house / visitor services staff	13.00	14.27
Guides	13.00	14.00
Maintenance	13.53	16.65
Admin. Assistants	15.00	15.50
Gardeners	13.05	15.90
Team leaders/supervisors	14.00	15.00

6.3 Range of Annual Salary

The ranges of pay for management and senior staff as reported by respondents is shown in Table 10. Between 13 and 56 respondents answered this question. These have been calculated on the same basis as the pay ranges for hourly paid staff (Table 9).

Table 10: Average Range of Annual Salary by Category

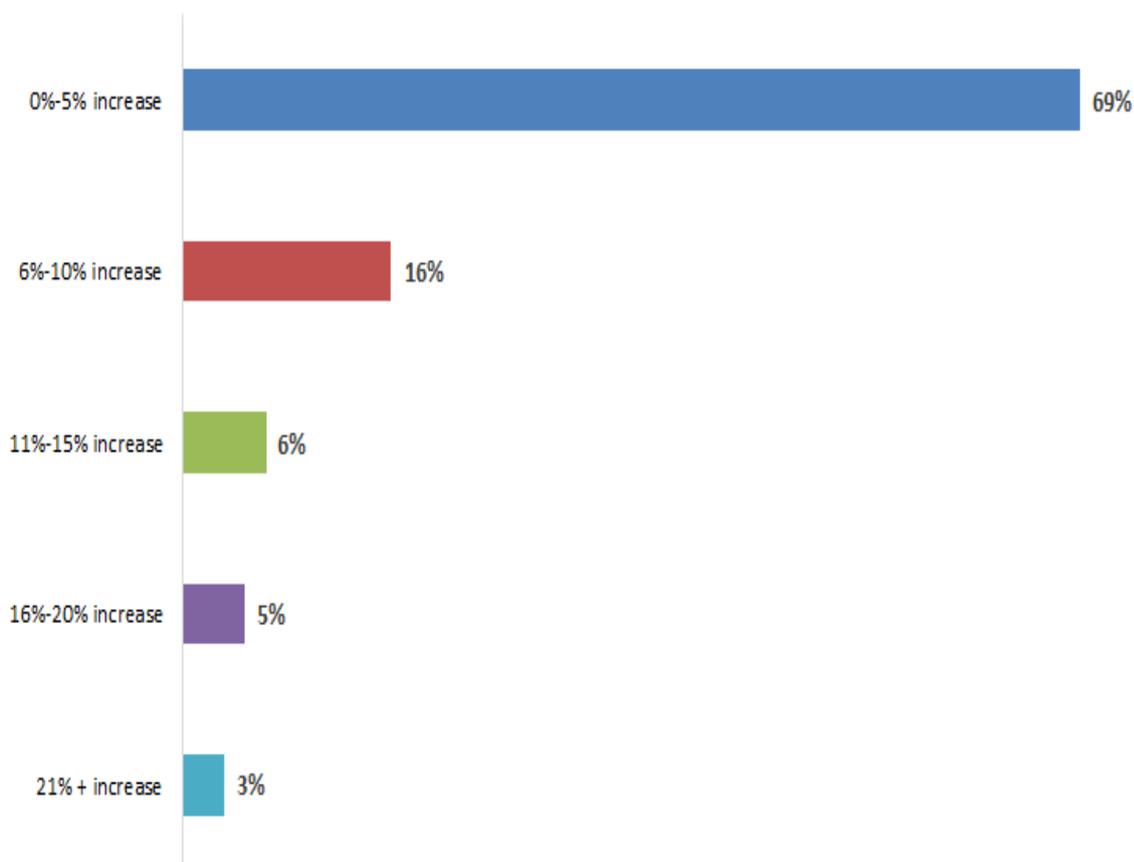
	Low End, €	High End, €
General manager/CEO	67,380.00	81,470.00
Heads of department	45,322.00	61,392.00
Assistant heads of department	40,466.00	48,013.00
Marketing executives	38,202.00	45,477.00
Accountants	46,474.00	57,772.00
Curators	49,919.00	62,455.00
	Median Value, Low End €	Median Value, High End €
General manager/CEO	57,300.00	65,500.00
Heads of department	45,000.00	58,000.00
Assistant heads of department	35,000.00	42,000.00
Marketing executives	38,000.00	40,000.00
Accountants	39,500.00	53,043.50
Curators	42,000.00	56,969.00

6.4 Average Percentage Salary Increase Applied in 2024 vs 2023

For those staff not on national minimum wage, 85% of respondents reported that average salary increases of up to 10% were applied in 2024. (Note that in 2023 the National Minimum Wage was €11.30 per hour.)

Only 3% of respondents reported salary increases in excess of 21% in 2024 vs 2023. The weighted average figure came to 5.5%.

Figure 6.2: Percentage of Average Salary Increase



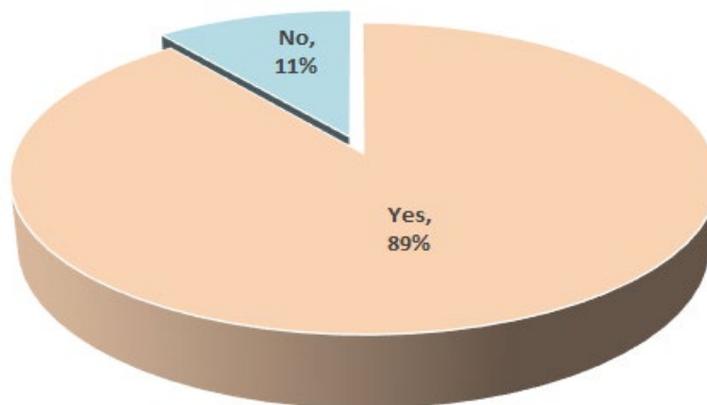
7. ONLINE BOOKING SYSTEM

Online ticket sales have grown significantly in recent years. The requirement to manage visitor numbers and bookings during the Covid-19 pandemic undoubtedly accelerated this trend. The following charts illustrate the extent to which respondents have introduced online booking systems, the status of their systems and integration with other systems.

In brief, 89% of respondents have an online ticket sales capability, a small increase on the 85% recorded in the 2022 survey. The vast majority have a system capable of selling tickets with specified time slots. Two-thirds of respondents have ticketing systems integrated with other sales and marketing systems.

7.1 Proportion of Sites with an Online Booking System

Figure 7.1: Proportion of Sites with an Online Booking System



For the 89% of respondents who have an online booking system, the following characteristics apply:

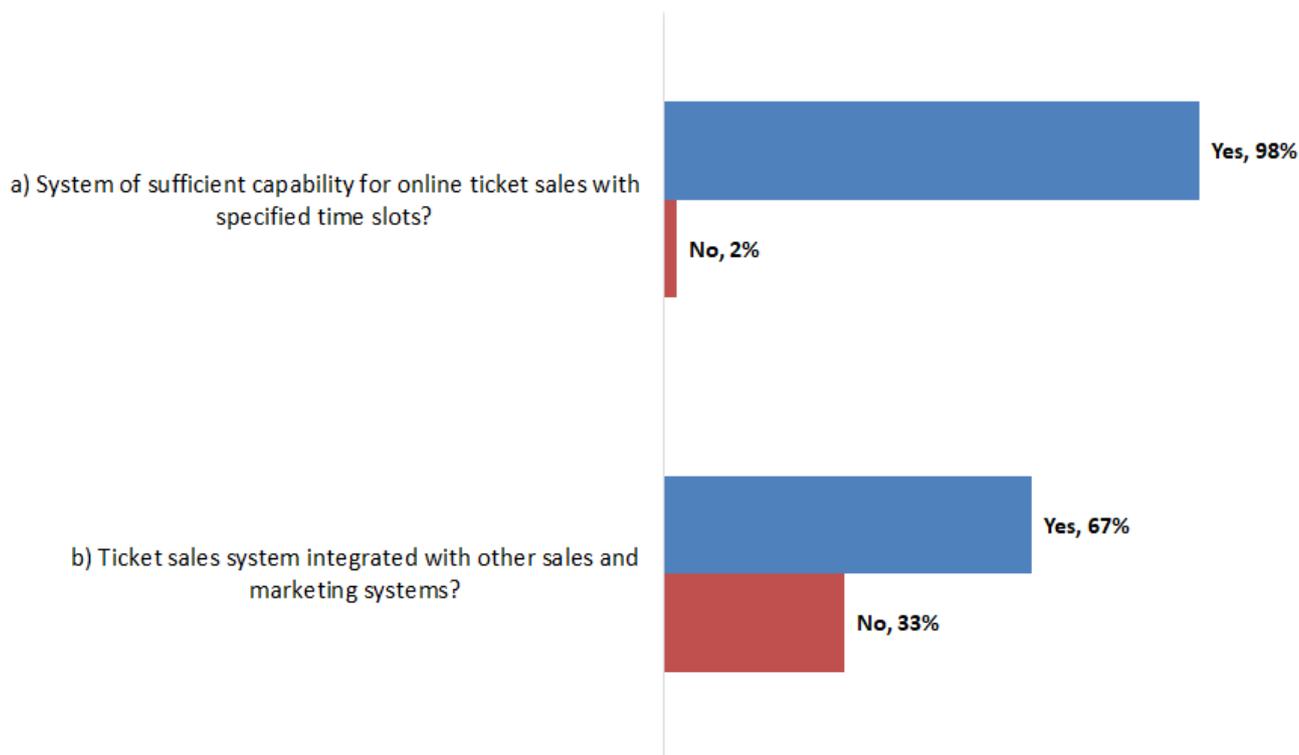
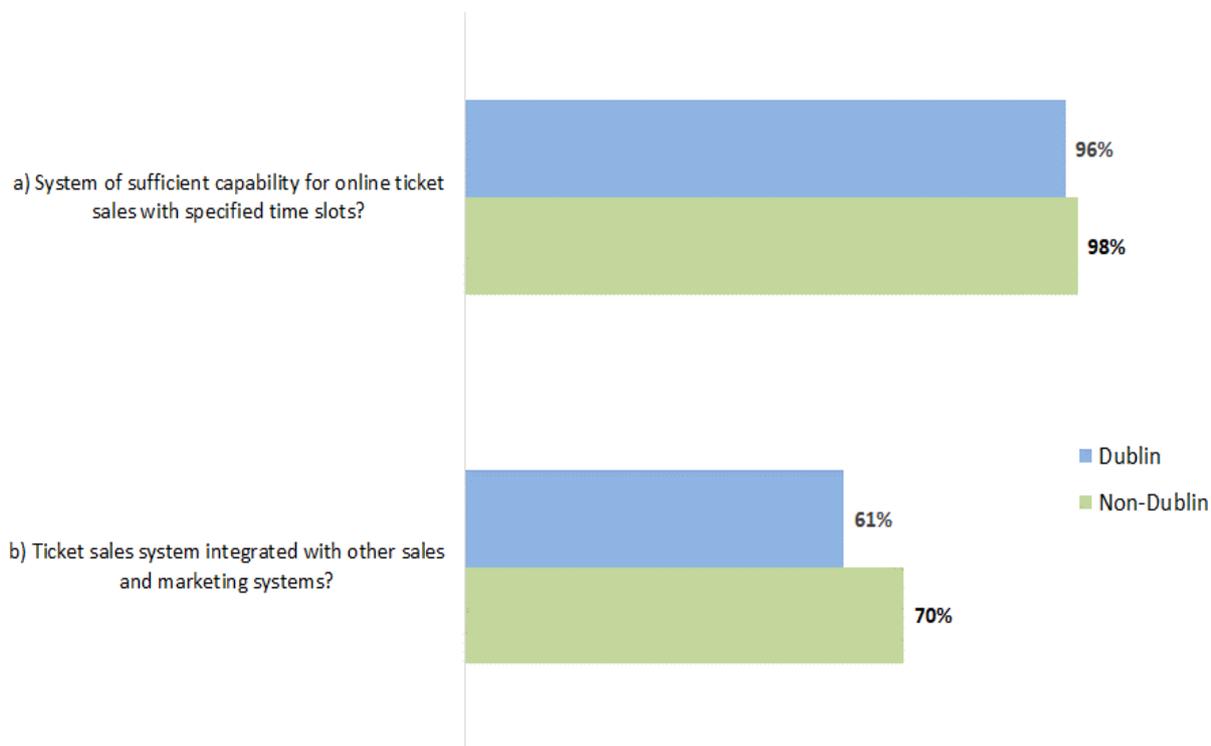


Figure 7.2: Status of Online Booking Systems – Dublin vs Non-Dublin



7.2 Ticket Sales Systems

Figure 7.3: Ticketing System Integrated with other sales and marketing systems

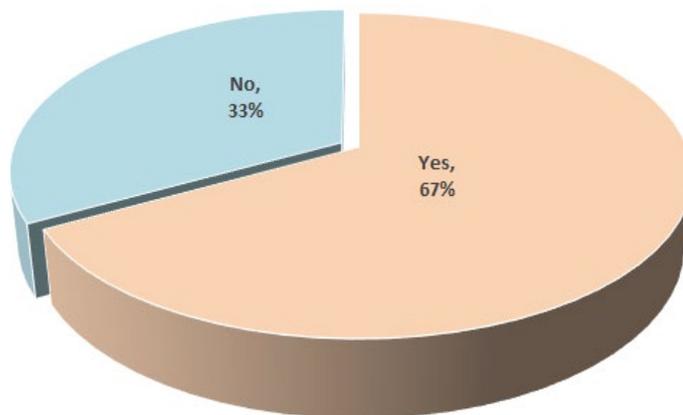
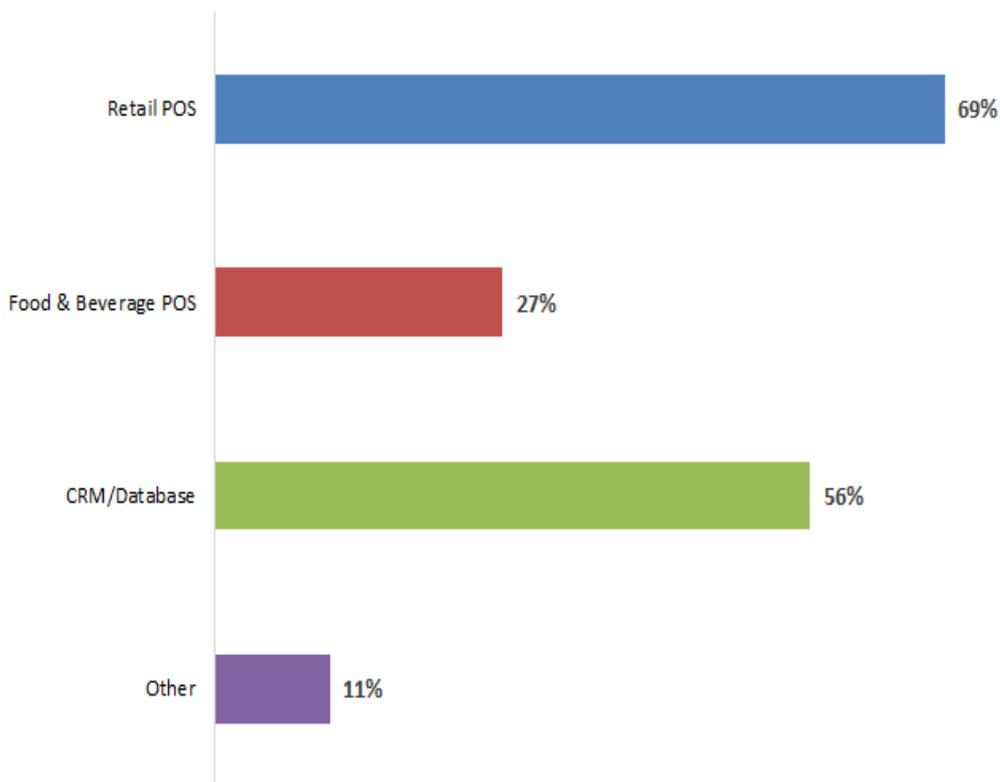


Figure 7.4: If Yes, which systems?



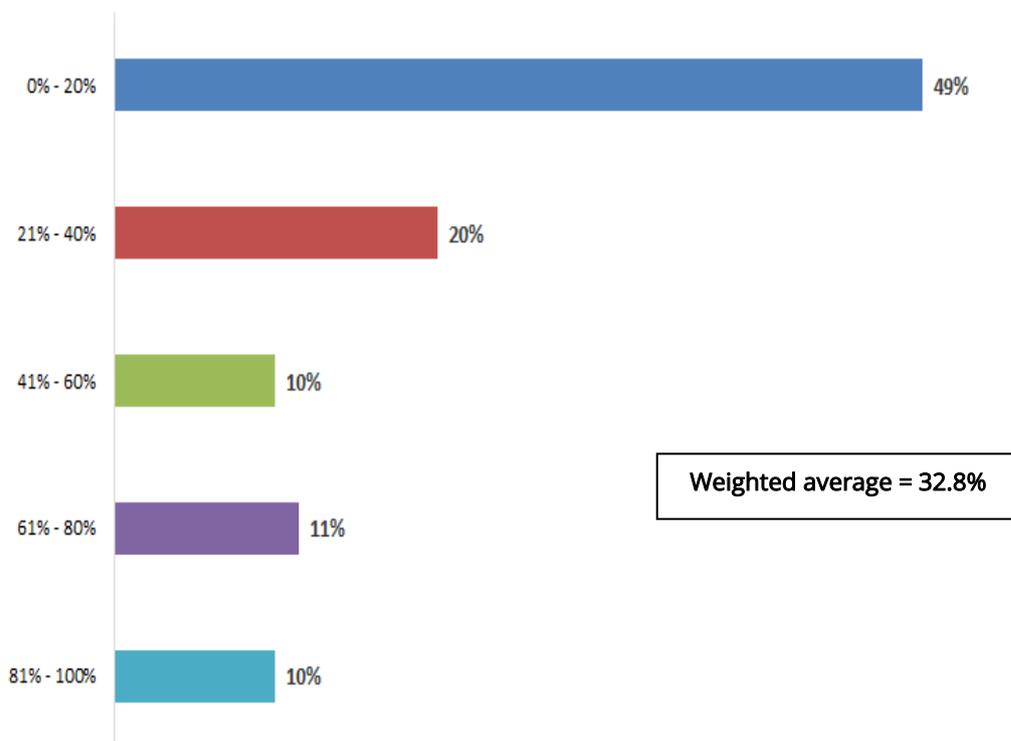
Proportion of Tickets Sold Online in 2023

The overall average share of tickets sold online in 2023 was 33% just a little up on the 30% recorded in 2022 but which was almost double the average of 17% recorded in 2019. The shift to online shopping and bookings in recent years both during and post the Covid-19 pandemic has contributed to this rapid growth. 92% of respondents expect this trend to continue.

Table 11: Proportion of Tickets Sold Online in 2023

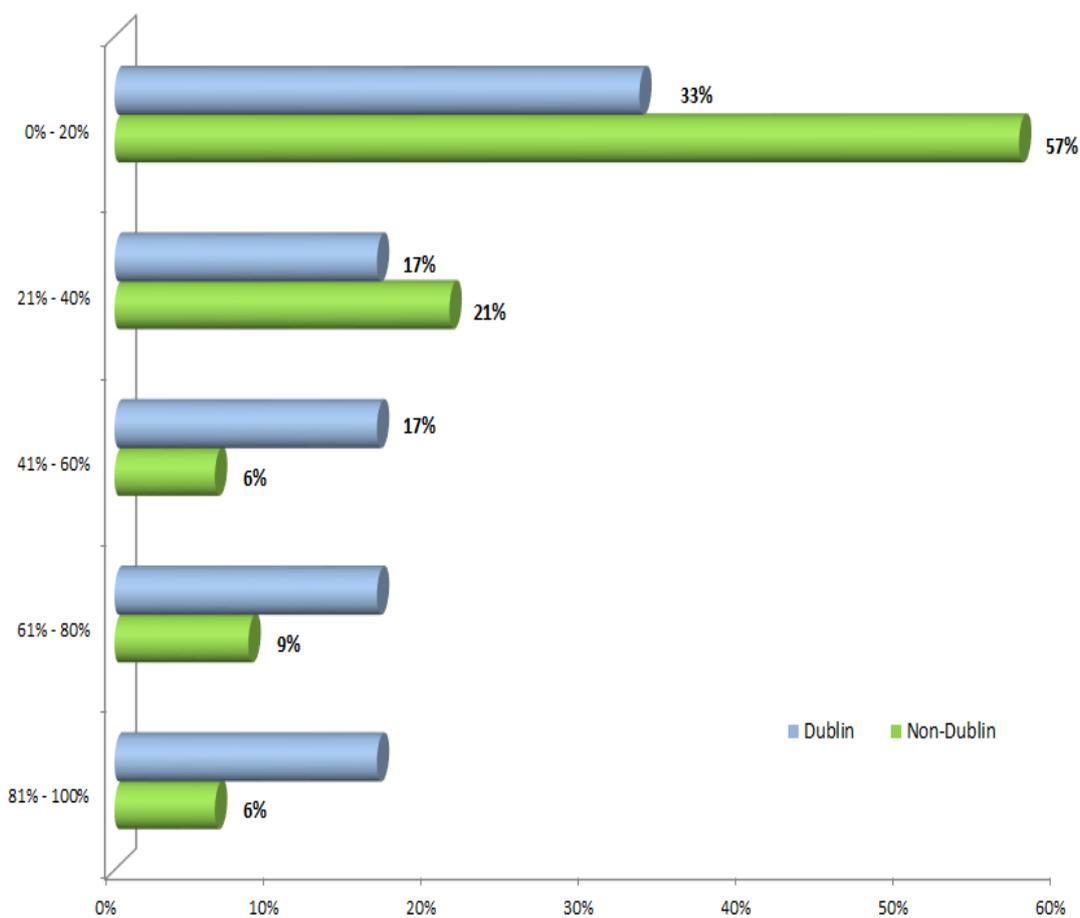
0% - 20%	35	49%
21% - 40%	14	20%
41% - 60%	7	10%
61% - 80%	8	11%
81% - 100%	7	10%
Total	71	100%

Figure 7.5: What % of tickets did you sell online in 2023?



On average, sites in Dublin sell a higher proportion of tickets online than is the case with sites outside Dublin, as shown in Figure 7.6.

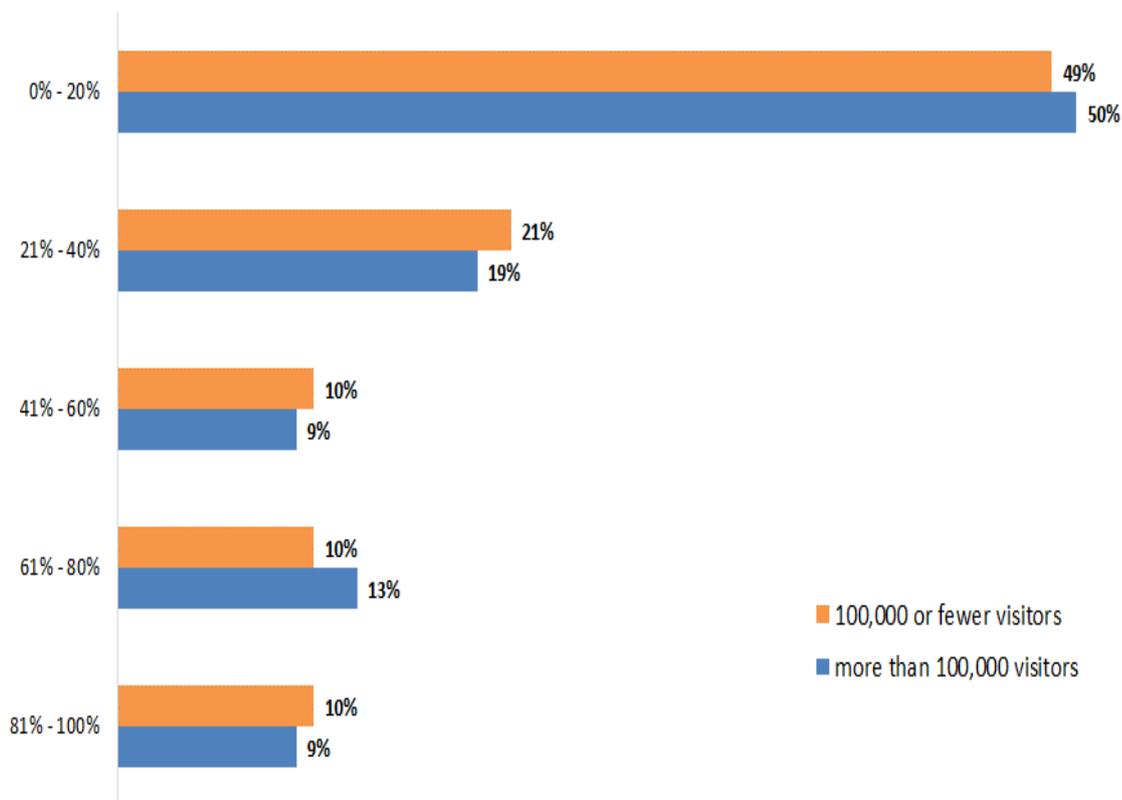
Figure 7.6: What % of tickets did you sell online in 2023?
 - Dublin vs Non-Dublin



Dublin weighted average = 43.7%
 Non-Dublin weighted average = 27.2%

There is little difference between sites receiving fewer than 100,000 visitors and those receiving more than 100,000 with regard to the proportion of tickets sold online.

Figure 7.7: What % of tickets did you sell online in 2023?
 – 100,000 visitors or less vs more than 100,000 visitors



100,000 or fewer visitors weighted average = 32.8%
 more than 100,000 visitors weighted average = 32.8%

As Figure 7.8 illustrates, Brand Experiences and Other attractions made significantly higher proportions of their tickets sales online than was the case with Historic Sites and Heritage Centres, Museums and Galleries.

**Table 12: What % of tickets did you sell online in 2023?
 - by Category of Attraction**

Categories	Historic Sites	Visitor Heritage Centre/ Museum/Gallery	Brand Experience	Other
0% - 20%	57%	65%	23%	41%
21% - 40%	14%	5%	38%	29%
41% - 60%	5%	10%	15%	12%
61% - 80%	5%	5%	23%	18%
81% - 100%	19%	15%	0%	0%
	100%	100%	100%	100%
Weighted average	33.1%	30.2%	38.1%	31.5%

Figure 7.8: Do you expect this to increase or decrease in 2024?



When asked why respondents expected online sales to **increase** or **decrease**, the following were the main answers given:

Increase:

- Increased marketing and advertising activity including increased investment, increased promotion and campaigns, increased brand awareness, more events, higher targets.
- Booking systems are becoming easier to use, becoming more convenient and people are getting better at booking in advance; strong changes in consumer behaviour to more online.
- Have invested in/upgraded website, improved booking systems, better booking engines.
- Have moved more of the business online through lessons and skills learnt from Digital that Delivers programme; this has increased efficiency, generated more results driven outcomes, enabled variable pricing models.

Decrease:

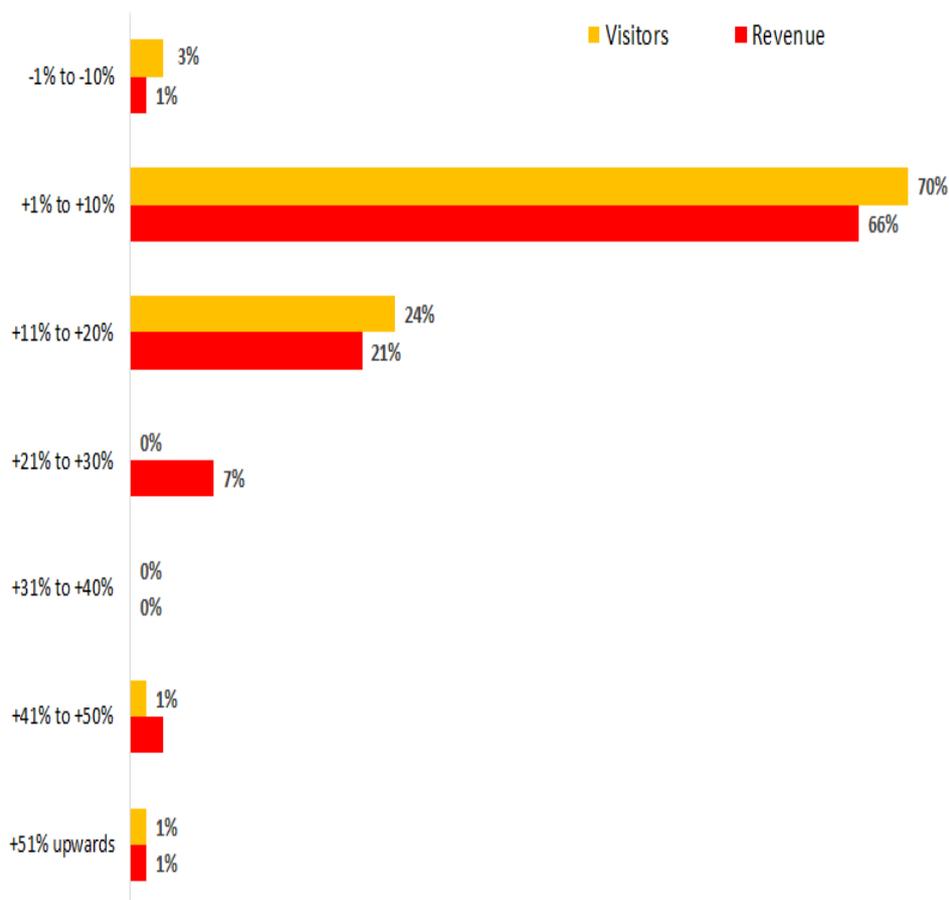
- Not yet back to pre-Covid levels yet but hoping will expand further for 2024.
- Running fewer events and have a shorter season; a decrease in overnight stays resulting in overall decline.

8. FINAL OBSERVATIONS

8.1 'Best Guess' Projections

Looking ahead, 97% of respondents anticipate increased visitor numbers in 2024 with slightly more (99%) expecting increased revenue. These proportions are similar to those projected for 2023 in last year's survey. The average scale of increase expected is 9.5% for visitors and 11.5% for revenue. If demand in 2023 was 6% below the 2019 peak, as indicated by the comparison of performance across both years at some 55 sites, the anticipated growth in 2024 will leave the sector still a little short of that peak.

Figure 8.1: What is your 'best guess' projection for 2024 as a % of 2023 in terms of visitor numbers and revenue?



8.2 Key Factors Influencing Outlook for 2024

The key factors listed as those most important in influencing outlook for 2024 were as follows:

Internal:

- Lack of resources and less funding available.
- Recruitment – greater availability of staff, better facilities, staff training, growth in scale of operation, better staff retention.
- New website and online booking system.
- Increased marketing budgets, more activities and events, better marketing campaigns, new investment, focused business plans.
- Increased capacity, higher frequency of tours.
- Strong and settled teams rebuilt post-Covid facilitating flexible working arrangements.
- Investment made in new products, refurbishment to old product.

External:

- Continued recovery in tourism post-Covid bringing a good level of bookings, income and business.
- Increase in Ireland's accessibility – new routes and more connections, particularly from the USA.
- Impact of 2024 USA elections, prolonged impacts of Covid, political unrest, climate change and sustainability, worldwide recessions, ongoing wars and safety concerns.
- Lack of availability of coaches and increasing costs of car hire.
- Ongoing issues regarding shortage of tourism accommodation stock and impact on visitors.
- Rising costs, rising insurances, wage increases.
- Improved marketing campaigns and introduction of dynamic pricing has increased awareness and visitor numbers.
- More competition resulting in a slowdown in business (although it also makes us improve).

8.3 Priorities for AVEA for 2024/25

- **Advocacy and Lobbying:** “Be Our Voice”, support us and continue to remind Government of the importance of the sector and its key issues including rising costs, wages, insurances, VAT etc.
- **Continue knowledge sharing and networking amongst members:** provision of opportunities for benchmarking; assist us with building connections; organisation of educational visits; continue to grow membership and facilitate an environment that enables members to share information and resources.
- **Support and highlight sustainable practices amongst members:** support transition for members to more sustainable practices; develop and publish best practice guides for different industries and sectors; share best practice models.
- **Promoting careers & education in the tourism industry:** share career and job opportunities on AVEA website; provide details on training supports, initiatives and opportunities; assist with recruitment issues.
- **Inform members of industry developments:** regarding accessibility of grants, funding streams and supports available from Fáilte Ireland and other agencies; assistance with PR campaign; assistance with marketing issues both domestic and for overseas markets; build a directory of services for members; focus on leveraging technology and innovation to enhance the destination experience.
- **Research:** provide research and key insights and likely impacts to members of issues pertaining to the sector (wages, sick pay, new legislation, registration, visitor behaviours, dissemination of statistical information etc.).
- **Accommodation shortage:** this issue greatly impacts all members – keep all updated.
- **Organisation of conferences, workshops and webinars:** on key areas that are specific to the visitor attraction sector; training programme and workshops for guides and front of house staff; PR training; hosting of more AVEA regional events.

9. APPENDICES

Appendix 1:

List of Members 2023/24

A1. LIST OF MEMBERS 2023/24

1	14 Henrietta Street	62	Kilbeggan Distillery and Visitor Centre
2	1798 National Centre & Enniscorthy Castle	63	Kilkenny Castle
3	Abbey Theatre	64	Kilkenny Civic Trust
4	Adare Heritage Centre	65	Killarney Brewing & Distilling Company
5	Aillwee Burren Experience	66	Killary Fjord Boat Tours
6	Airfield	67	Kilmainham Gaol
7	Ardgillan Castle	68	King John's Castle
8	Armagh Observatory and Planetarium	69	Knappogue
9	Athlone Castle & Luan Gallery	70	Kylemore Abbey & Gardens
10	Avoca Mill	71	Lough Boora Discovery Park
11	Belvedere House	72	Lough Gur Heritage Centre
12	Beyond the Trees Avondale	73	Lough Key Forest & Activity Park
13	Birr Castle Gardens & Science Centre	74	Lullymore Heritage Park
14	Book of Kells - Trinity College	75	Malahide Castle & Gardens
15	Brú na Boínne - Newgrange	76	Medieval Mile Museum
16	Bunratty Castle & Folk Park	77	MoLI - Museum of Literature Ireland
17	Burren Smokehouse	78	Mount Congreve Estate
18	Butler Gallery	79	Muckross House
19	Caherconnell Stone Fort & Sheepdog Experience	80	Nano Nagle Place
20	Canal Boat Restaurant	81	National Botanic Gardens
21	Castletown House	82	National Gallery of Ireland
22	Chester Beatty	83	National Leprechaun Museum of Ireland
23	Christ Church Cathedral Dublin	84	National Library of Ireland
24	Cliffs of Moher Visitor Experience	85	National Museum of Ireland - Country Life
25	Clondalkin Round Tower	86	National Museum of Ireland - Decorative Arts & History
26	Cobh Heritage Centre - The Queenstown Story	87	National Museum of Ireland - Natural History
27	Craggaunowen	88	National SEA Life Centre, Bray
28	Dalkey Castle & Heritage Centre	89	Newbridge Silverware
29	Donegal Castle	90	Oakfield Park
30	Doolin Cave	91	Thoroughbred Country
31	Doolin Ferry	92	Patrick Kavanagh Centre
32	Dublin Castle	93	Pearse Lyons Distillery
33	Dublin Discovered Boat Tours	94	Phoenix Park Visitor Centre
34	Dublin Liberties Distillery	95	Powerscourt Distillery
35	Dublinia	96	Powerscourt Estate & Gardens
36	Dún Aonghusa	97	Rock of Cashel
37	Dunbrody Famine Ship	98	Roe & Co
38	Emerald Park	99	Rothe House Museum & Gardens
39	EPIC - The Irish Emigration Museum	100	Russborough House & Parklands
40	Experience Glasnevin	101	Saint Patrick's Cathedral
41	Fanad Lighthouse	102	Shannon Aviation Museum
42	Fota House, Arboretum and Gardens	103	Skerries Mills
43	Foxford Woollen Mills	104	Slane Castle
44	Foynes Flying Boat Museum	105	Slane Distillery
45	GAA Museum & Croke Park Tours	106	Sliabh Liag Visitor Centre
46	Game of Thrones Studio Tour	107	Smithwick's Experience
47	Glenarm Castle	108	Spike Island
48	GPO Witness History	109	St. Canice's Cathedral and Round Tower
49	Guinness Storehouse	110	Strokestown Park House & National Famine Museum
50	Hook Heritage	111	Swords Castle
51	House of Waterford Crystal	112	Teeling Whiskey Distillery
52	Hugh Lane Gallery	113	The Shed Distillery of PJ Rigney
53	International Rugby Experience	114	Titanic Experience Cobh
54	Ionad Culturtha an Phiarsaigh	115	Valentia Island Lighthouse
55	Irish Museum of Modern Art - IMMA	116	Vandeleur Gardens
56	Irish National Heritage Park	117	Waterford Treasures
57	Irish National Stud & Gardens	118	Wells House & Gardens
58	Irish Whiskey Museum	119	Westport Estate
59	Jameson Distillery Bow St.	120	Wicklow Gaol
60	Jameson Distillery Midleton	121	Visit Youghal/Youghal Clock Gate Tower
61	Johnstown Castle Estate, Museum & Gardens		

Appendix 2:

Survey Questionnaire

A2. SURVEY QUESTIONNAIRE



FINAL



ASSOCIATION OF VISITOR EXPERIENCES & ATTRACTIONS

Survey of Business Performance 2023

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 2023. The findings of the survey will enable AVEA to represent and promote the interests of its members more effectively and to influence external bodies including Fáilte Ireland, the Department of Tourism, Culture, Arts, Gaeltacht, Sports & Media, and ITIC. It will also enable members to benchmark their experience of 2023 against that of the industry as a whole. Your input is vital. The survey is strictly confidential. CHL will not release completed questionnaires or their content 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 it directly via the secure link provided by close of business on **Wednesday, 16th March 2024**. Please contact Michael Counahan (tel: 087 250 5879 / mcounahan@chl.ie) or Siobhán McMahon (tel: 01 284 4760 / smcmahon@chl.ie) if you have any queries.

NOTE: ALL DATA PROVIDED SHOULD REFER TO THE YEAR 2023

- 1) Name of Visitor Experience/Attraction:
- 2) Questionnaire completed by:

ABOUT YOUR ATTRACTION

3) Location:
 City / Town: _____
 County: _____

4) What category of attraction are you?
 (Please insert 'X' in the appropriate box)
 Historic site: _____
 Visitor heritage centre: _____
 Museum/gallery: _____
 Visitor garden: _____
 Zoo, aquarium & open farm: _____

5) What kind of organisation are you?
 (Please insert 'X' in the appropriate box)
 Private limited company (for profit): _____
 Private limited company (not for profit/charitable status): _____

6) Do you have external contractors/concessionaires on-site?
 (Please insert 'X' in the appropriate box)
 If Yes, for what functions? (Please insert 'X' in the appropriate boxes)
 Retail: _____
 Food & Beverage: _____
 Cleaning: _____

7) For how many weeks were you open to visitors in 2023?
 weeks: _____

8) Do you charge for admission? (Please insert 'X' in the appropriate boxes)
 Yes: _____
 No: _____

9) Name of Visitor Experience/Attraction: _____
 City / Town: _____
 County: _____

10) What category of attraction are you?
 (Please insert 'X' in the appropriate box)
 Natural attraction: _____
 Brand experience: _____
 Heritage park, leisure & theme park: _____
 Other (please specify): _____

11) What kind of organisation are you?
 (Please insert 'X' in the appropriate box)
 State body/local authority: _____
 Other (please specify): _____

12) Do you have external contractors/concessionaires on-site?
 (Please insert 'X' in the appropriate box)
 If Yes, for what functions? (Please insert 'X' in the appropriate boxes)
 Facilities management: _____
 Other (please specify): _____

13) For how many weeks were you open to visitors in 2023?
 weeks: _____

14) Do you charge for admission? (Please insert 'X' in the appropriate boxes)
 Yes: _____
 No: _____

KEY FINANCIAL DATA

9) What was your total revenue in 2023, net of VAT?

10) What % of your revenue in 2023 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	
Sponsorship	
Covid support grants	
Other grants (e.g. Community Service Programme)	
Gifts / donations	
Other (please specify)	
Total	0.00%

11) Ticketing: What was the average ticket sale price per visitor in 2023 (net of VAT)?
(total ticket revenue divided by total no. of paying visitors)

11a) Have you increased your ticket prices for 2024? (pls insert 'X' in the appropriate boxes)

Yes	No

11c) If Yes - by what average percentage %

12) Do you vary your pricing in response to demand peaks and troughs? (e.g. higher prices for peak hours/days/months) (pls insert 'X' in the appropriate boxes)

Yes	No

13) If you sell annual membership, what was your percentage retention rate for 2023?

14) Retail sales: what was the average retail spend per visitor in 2023 (net of VAT)?
(total retail sales divided by total no. of visitors - including complimentary)

15) Café/restaurant: what was the average food & beverage spend per visitor in 2023 (net of VAT)?
(total food & beverage sales divided by total no. of visitors - including complimentary)

16) What was the break-down of your operating expenditure in 2023 across the following categories?

Category	%
Staff (including contractors)	
Marketing / Sales (not including staff)	
Energy	
Insurance	
Rent and rates	
Repairs and maintenance	
Cleaning	
Other (please specify)	
Total	0.00%

17) In your most recent insurance renewal:
- has the price changed? (pls insert 'X' in the appropriate boxes)

Yes	No

17a) If Yes, by how much has it increased/decreased (%)?

Increase %	Decrease %



ASSOCIATION OF VISITOR
EXPERIENCES & ATTRACTIONS

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