



ASSOCIATION OF VISITOR
EXPERIENCES & ATTRACTIONS



ANNUAL BUSINESS SURVEY 2024

www.avea.ie



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Survey of Business Performance 2024



-Detailed Results –

June 2025



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Dear Members

I am delighted to present to you the Annual Survey Report of Member Businesses for AVEA for the year 2024. Our partners Spark Market Research worked closely with members to gather valuable data in new ways. They have analysed and presented it to bring insight and value to members, and validity and heft to our advocacy. Thanks are due to Spark for their impeccable management of the survey, and their patience in guiding us through a new process. Confidentiality around data is of paramount importance for members, and the independence and impartiality of the reporting must be impeccable – values that underpin the Spark approach and were displayed by the team throughout.

As an Association, we engage collaboratively with the three tourism agencies Fáilte Ireland, Tourism Ireland, and Tourism Northern Ireland. Our exchange of insights and ideas is mutually beneficial. We are committed to tailored learning, development, and marketing opportunities for our members. We also work with the Government to inform policy-making, and to advocate for tourism marketing and development.

This year, we extended our survey to a pilot group of non-member visitor attractions, enhancing the survey's richness and reach. We achieved the highest participation rate ever at 114 visitor attraction businesses on the island of Ireland, and I want to extend our sincere thanks to everyone who participated. The survey provides valuable data for advocacy and helps other tourism sectors understand the value of visitor attractions.

The publication of this survey is timely as we look forward to the 2025 high season. Undoubtedly, tourism to the island is in a very much better place than it was five years ago. Interest in holidaying in Ireland remains strong in key overseas markets and, most importantly, airlines and other travel intermediaries, through their expanding services, continue to demonstrate their commitment and confidence in the future of tourism here. Connectivity to the island is better than ever. That said, uncertainty in the global economy, continuing pressure on the cost of doing business, and changing holiday patterns whereby visitors reduce length of stay to mitigate rising costs, make for challenging times for tourism and for the visitor attraction sector.

AVEA closely monitors several sources of data in the tourism marketplace to help members to understand trends, including projections from the inbound tour operators, carriers, access points, and accommodation providers, as well as the Central Statistics Office and NISRA. 2025 and 2026 are viewed with cautious optimism, but visitor attractions outside of the most popular tourist destinations rely heavily on the domestic market too. The marketing activities of Fáilte Ireland and Tourism Northern Ireland, and their wider enterprise supports around business resilience, are most welcome in enabling our members, in the main SMEs, to defend and grow the vital home market.

Our respondents employ almost 6,000 people across the island and are significant contributors to local economies in the creation of sustainable jobs, and the purchase of goods and services in and beyond tourism. 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 – at 52% – and, similar to previous years, respondents report challenges in recruiting guides and front-of-house staff in particular.

While attractions are at the heart of the three main motivators for visitation to Ireland – landscape and scenery, culture and heritage, and people – it is not a sector that prices at a premium. Our Survey reveals that the median ticket yield in 2024 was €11.00, while the median retail spend was just €4.00 per person. Attractions have to work very hard to achieve profitability. As a sector with high overheads and 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, while the 13.5% VAT rate pushes prices higher for the visitor. We will continue to work in partnership with Tourism Ireland to ensure that visitor attractions remain at the core of the international marketing proposition, and to draw tourists into the regions, deepen their engagement, and encourage them to dwell longer in their destinations.

We thank our trusted Platinum Partners who provide valuable financial assistance, enabling the Association to deliver a comprehensive programme of work including this Survey, our Member Forums, our two-day Annual Conference and learning journeys, as well as webinars and regular intelligence and updates throughout the year – all in support of AVEA's core objectives: member networking and knowledge exchange, research, advocacy, education and career development, and sustainable best practice.

I would also like to take this opportunity to recognise the year-round commitment and work of our voluntary Board of Directors, who are drawn from the membership, and to thank our CEO, Catherine Flanagan, in delivering this survey as part of an annual programme of work on behalf of the AVEA membership. Across the tourism sector, AVEA maintains a very positive reputation having established fraternal relationships with our colleagues on the Tourism and Hospitality Forum, the Council of the Irish Tourism Industry Confederation (ITIC), the Central Marketing Partnership Group, and various other working groups. AVEA works tirelessly to keep the most senior tourism decision-makers and stakeholders abreast at all times of our challenges and opportunities.

To conclude, our key challenges – creating and maintaining sustainable and rewarding sectoral jobs, rising costs, VAT, insurance, and the competitive environment for international and domestic tourism – will remain the focus of AVEA's efforts to ensure our members can achieve their full tourism potential. Our strength lies in our unity, and the members of AVEA which make up the wonderful mosaic of visitor attractions on this beautiful island are committed to delivering the warmest of welcomes to all who come through our doors.



Anne O'Donoghue
AVEA Chairperson, June 2025

1. Survey Introduction and Executive Summary

1.1. Introduction

AVEA have been conducting a survey with their members for a number of years and the information has provided vital numbers on the health of the industry. It is used to make important business decisions and to better advocate for its members and promote their interests. It also highlights the sector's contribution to Irish tourism in our engagement with industry stakeholders and Government agencies. This survey collects essential data on the nature, scale and scope of the members' operations, as well as key factors influencing performance.

This report contains the findings of the eighth annual survey of AVEA's members with regard to their business performance over the previous year: 2024.

This year, the survey was moved to Spark Market Research, enabling data collection via an online survey link to futureproof the methodology against the likely potential for larger numbers of participants in the future, and to give participants confidence about the security of the data they provide.

Historically, the survey has been conducted only with AVEA members. For this year, a pilot sample of non-members was included, to broaden the report's reach across the whole of the island of Ireland, and to enable greater comparison of performance between Dublin, rest of Ireland outside of Dublin, and Northern Ireland. Due to the introduction of more Northern Ireland attractions this year, participants were given the option to complete the survey in Euros or GBP. Answers given in GBP have been converted into Euros using a £1 = €1.20 conversion rate.

The survey questionnaire was issued in March 2025 to visitor attractions and experiences who opted to take part – most invitations were sent to AVEA members, with a small proportion of non-members. 114 responses were received in total, representing an overall response rate of 69% participation rate from the full AVEA membership body.

	Responded* number	Participation rate%
AVEA Members	104	69%
Non Members	10	83%
Total	114	70%

*NB: Responded is classed as having answered at least one question in the survey

Due to the inclusion of more non-members this year, there was a larger number of visitor attractions and experiences from Northern Ireland when compared with previous years. In total, 34% were from Dublin, 55% were from the rest of the Republic of Ireland, and 9% were from Northern Ireland. 31% were for-profit companies, 34% were non-profit, 29% were state bodies/local authorities and 6% did not fit into any of those three categories.

Location	2024	2023	2022
Dublin	34%	33%	41%
ROI outside of Dublin	57%	65%	58%
Northern Ireland	9%	2%	1%

We have reported the results of questions where relevant to show the differences between Dublin, ROI outside of Dublin, and Northern Ireland. However, please note that due to the lower number of responses from Northern Ireland, these results should be treated with caution and treated as indicative only. Where we received fewer than 5 responses for a particular question, we have not reported those results due to the very low reliability of that data. As we anticipate greater participation in future years from experiences and attractions in Northern Ireland, the data bank will grow, and will enable valuable insights and comparisons to be drawn for the first time.

Based on the data supplied by respondents, the following highlights emerge;

- Across all attractions surveyed, there was a total of 19,299,908 visitors in 2024, an uplift from 2023.
- The total profit generated by respondents was €93m, based on data from 57 respondents who answered that question.
- Over half of the respondents surveyed are feeling ‘generally positive’ about the future. However, only 7% of those are feeling ‘very positive.’
- Most businesses are predicting an increase in revenue and visitor numbers for 2025, but the proportional increases predicted are generally marginal.
- Attractions surveyed employ a total of 5,880 staff, an average of 67 per site (media: 32 per site)

1.2. Executive Summary

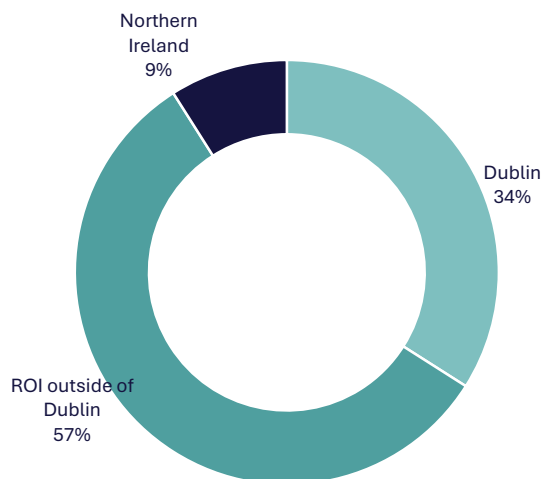
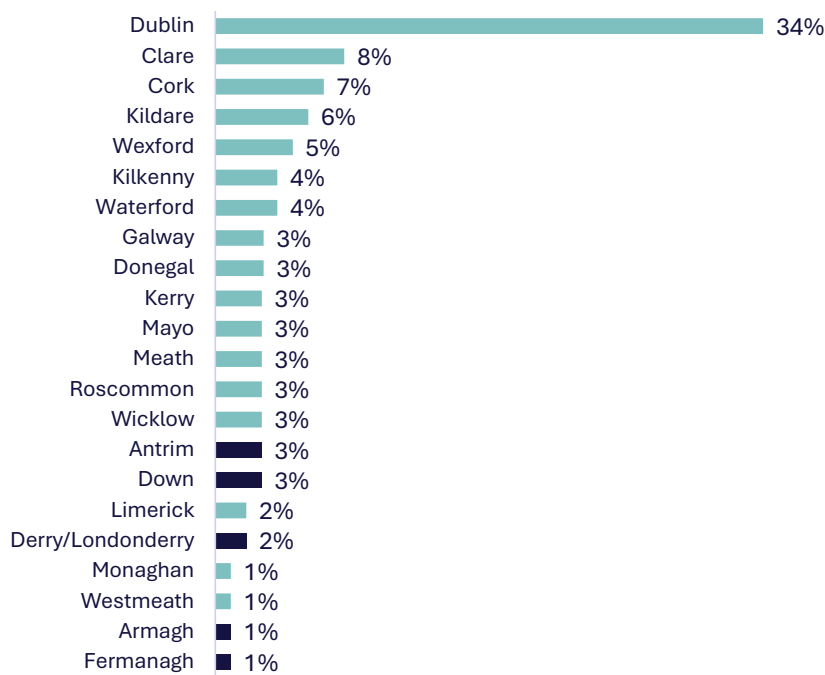
- 1) In 2024, attractions surveyed generated a total of €261m revenue, €93m profit, had 19.3m visitors and employed a total of 5,880 staff.
- 2) Location, attraction type, incorporated status, number of weeks open and charges for admissions remained similar to previous years.
- 3) Around one-third of ticket sales currently come from online sales, and most businesses with an online booking system expect this to increase over the coming year.
- 4) In a change to previous years, only around 4 in 10 attractions surveyed said they would be increasing their ticket prices for 2025.
- 5) Insurance premiums make up an average of 3% of attractions' operating expenditure. Most report their insurance premiums have gone up this year, with an average increase of 12% reported amongst those experiencing a rise.
- 6) Visitor numbers are up slightly (19.3m) in 2024 (like for like 18.6m for 2023 as reported in this year's survey) .
- 7) Visitor nationality remains quite heavily domestic and seasonally between May-September, especially for attractions outside of Dublin.
- 8) Attractions outside of Dublin are far more likely to employ part-time and seasonal staff, have more staff on minimum wage, and are less likely to be applying pay increases in 2025 for those staff not on minimum wage.
- 9) Businesses have a generally positive outlook for 2025, with most expecting an increase in visitors and revenue, although most are predicting marginal improvements.

2. About your attraction

2.1. Location

39 of 115 respondents are based in Dublin, 65 are based across other counties in the Republic of Ireland, and 11 are based in Northern Ireland. Non-Dublin representation continues to increase – this will have been influenced by the inclusion of non-members in this year’s survey, which included the outreach to attractions in Northern Ireland.

Figure 2.1. Distributions of respondents by county



NB: Not all respondents answered the individual county question, so there may be some very small discrepancies between the percentages.

2.2. Category of Attraction

There is a higher representation of museum / galleries and historic sites than any other attraction. A number of respondents fall into more than one category due to offering multiple experiences.

Figure 2.2 Category of attraction



Data for 'other' (18 responses) primarily came from those classifying themselves as 'boat tours' (4 responses), distilleries (4 responses), and science centres (2 responses).

Figure 2.3 Category of attraction by region

Almost half of the attractions in Dublin fit into the museum/gallery category. The majority of attractions outside of Dublin are categorised as historic sites (36%).

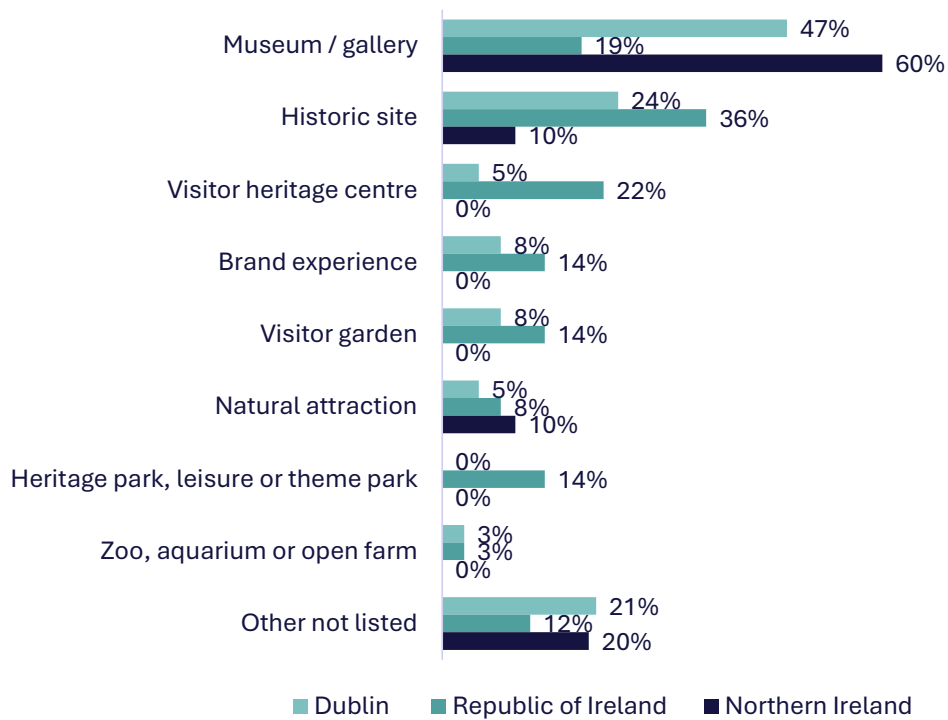
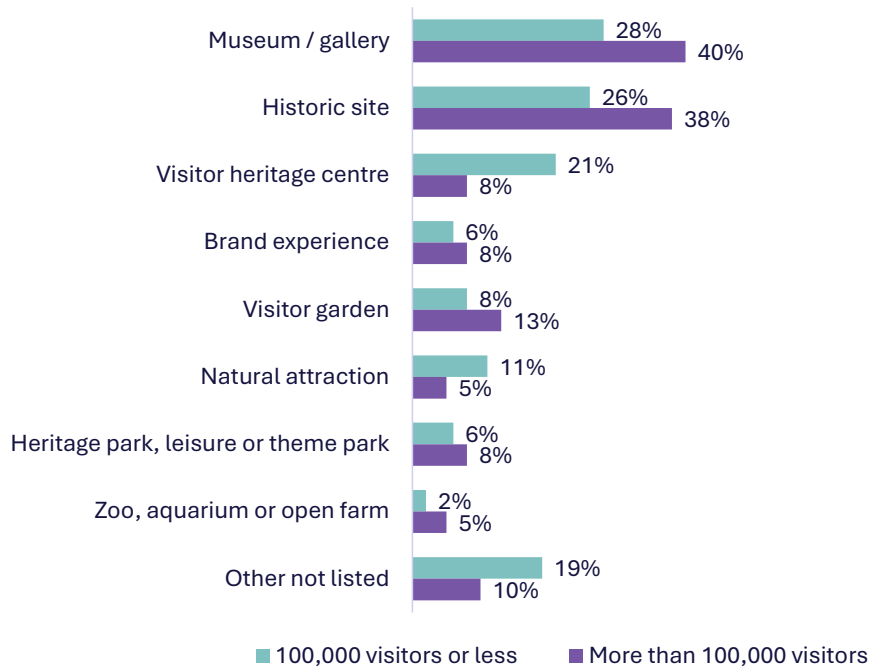


Figure 2.4. Category of attraction by number of visitors

Attractions with more than 100,000 visitors are more likely to sit in the museum and historic site categories, whilst attractions with fewer than 100,000 visitors tended to be visitor heritage centres and natural attractions.



2.3. Type of Organisation

There was similar proportional representation from for-profit (32%) and non-profit (34%) private limited companies and slightly less from state bodies/local authorities (28%) as in prior years' surveys. 6% (7 responses) identified with the 'other' category, which largely consisted of CLGs and charitable trusts.

Figure 2.5 Distribution of respondents by organisation type

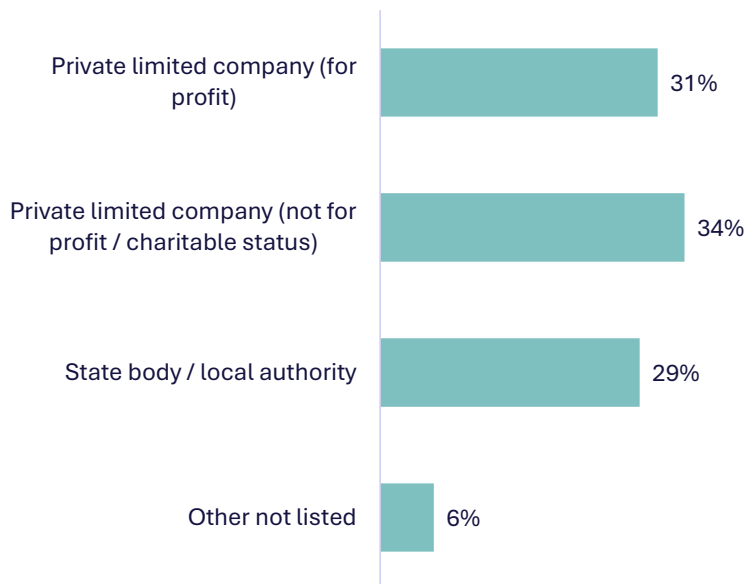
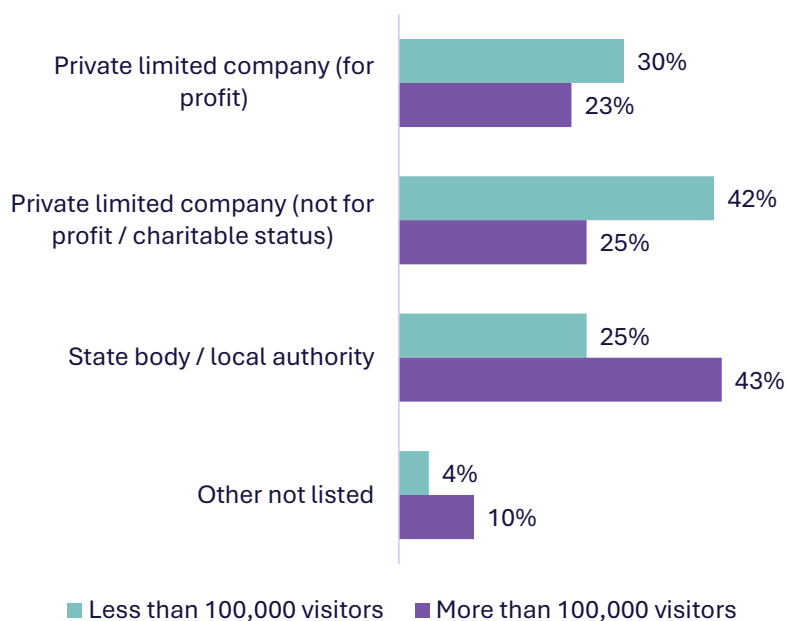


Figure 2.6 Distribution of respondents by number of visitors



2.4. Use of External Contractors/Concessionaires

Around half of the organisations surveyed state that they use external contractors. As figure 2.8 indicates, the majority was for food and beverage, and cleaning.

Figure 2.7 Use of external contractors / concessionaires

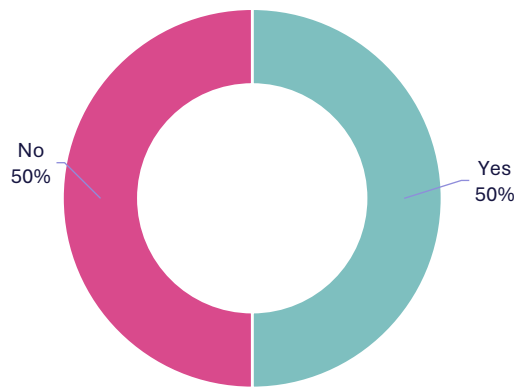


Figure 2.8: Distribution of contractor use



2.5. Weeks Open to Visitors

Attractions surveyed were open for an average of 49 weeks in 2024. Dublin-based respondents had a longer season than those outside of Dublin, reporting an average of 51 weeks total. Attractions in Northern Ireland had a shorter season by comparison; open for 46 weeks on average, coming in below average.

Attractions with 100,000 visitors or fewer also had a shorter season than attractions with 100,000 visitors or more. On average, attractions with 100,000 or fewer totalled 49 weeks, whilst 100,000 or more totalled 51.

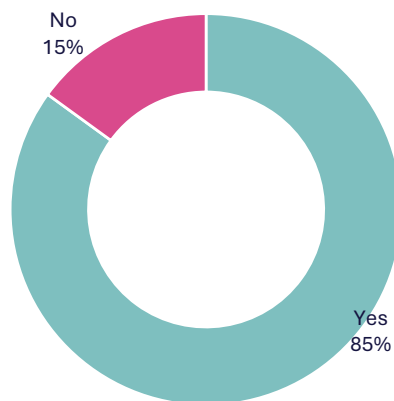
NB: Two attractions were excluded from the average weeks open calculations – one attraction which opened late 2024 and one which was closed for the entirety of 2024 as they distorted the averages.

2.6. Admissions

85% of attractions we spoke to charge for admissions. At 71%, museums / galleries were the type of attraction least likely to charge.

Figure 2.9 Charging for admission

Most members who responded to the survey charge for admission.



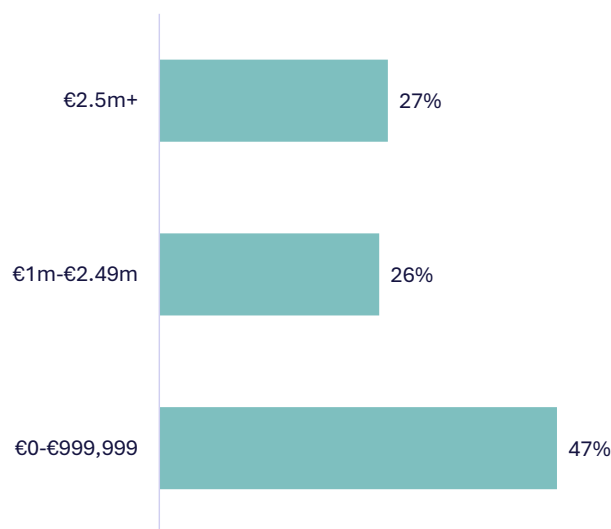
3. Financial Data

3.1. Revenue in 2024

The distribution of respondents by revenue is shown below in Figure 3.1. The total revenue generated by respondents was €261m from 78 attractions who answered this question (70 AVEA members and 8 non-members). This revenue cannot be directly compared to last year's due to different attractions from previous years answering this question. NB: two attractions were excluded from these figures, one which opened late December 2024 and one which was closed for the entirety of 2024.

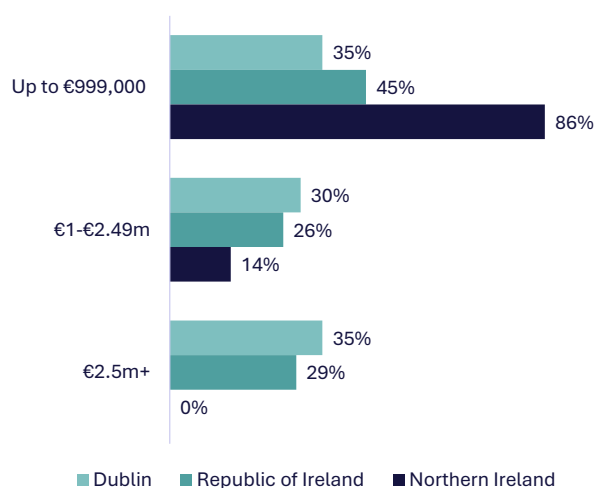
The majority of attractions received between €0-€999,999 in revenue (47%), with the rest relatively evenly split between €1m-€2.49m (26%) and €2.5m+ (27%).

Figure 3.1 Distribution of respondents by revenue



Attractions in Dublin had a higher revenue average than attractions outside of Dublin (€4.3m compared to €3.3m).

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

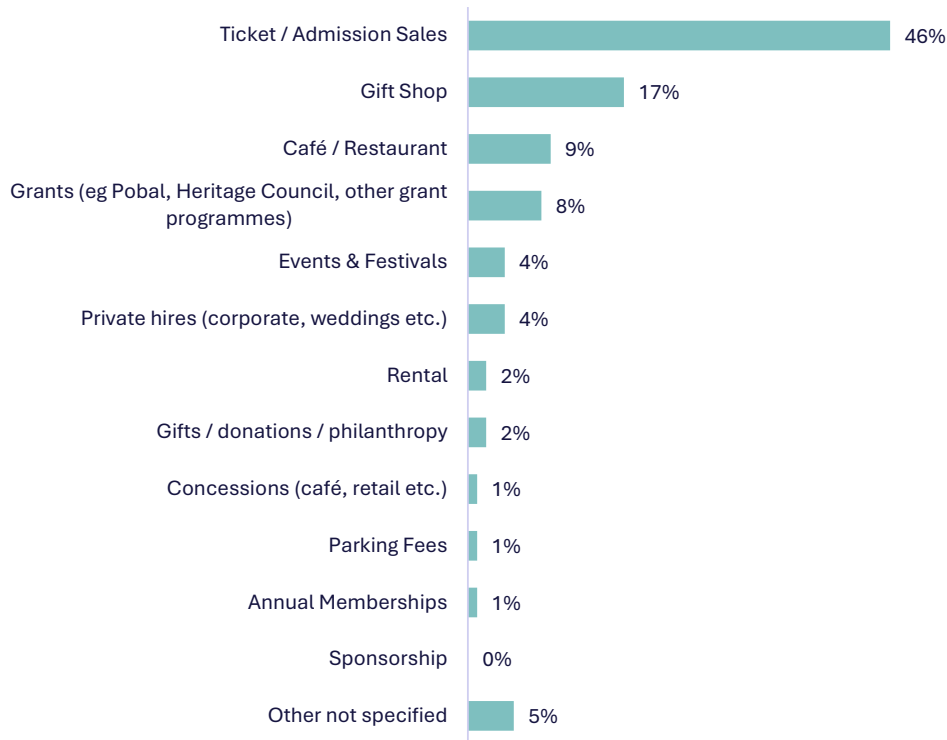


3.2. Distribution of Revenue by Source

The distribution of revenue by source is shown in figure 3.3.

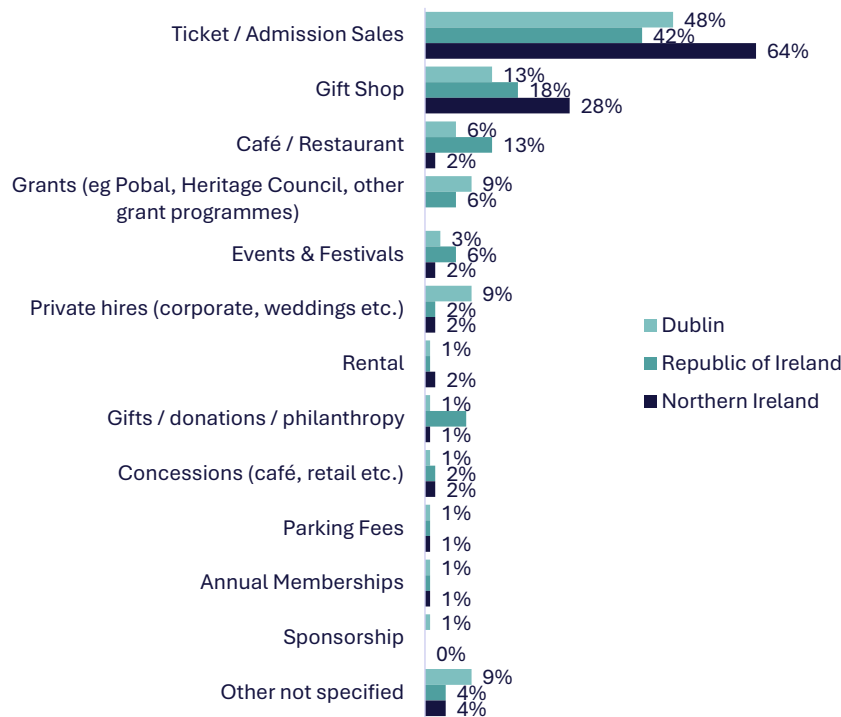
In 2024, nearly half of revenue was generated by ticket / admission sales, followed by gift shops (17%) and café and restaurants (9%).

Figure 3.3: Distribution of Revenue by Source



As shown in figure 3.4, all sites generate most of their revenue from ticket/admission sales. Outside of Dublin, revenue from the gift shop forms a very significant revenue stream. Within Northern Ireland, 64% of revenue was from ticket/admission sales, followed by the gift shop (28%), with the remaining categories being minor in comparison, illustrating the reliance on ticket sales as the key revenue driver. The food and beverage offering in attractions located in ROI outside of Dublin is significant at 13%; many attractions located in tourism destinations offer dining as an important element of their offering.

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



As shown in Table 1, natural attractions and heritage park, leisure or theme parks rely largely on ticket / admission sales for their sources of revenue. Visitor heritage centres have a large reliance on grants for their revenue in comparison to other categories. Sites with gardens (which includes estates and demesnes) gain a valuable contribution of 14% from events and festivals.

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

	Museum / gallery	Historic site	Visitor heritage centre	Visitor garden	Natural attraction	Heritage park, leisure or theme park	Brand experience	Other
Ticket / admission sales	39%	42%	26%	30%	62%	53%	45%	49%
Gift shop	18%	14%	9%	12%	13%	11%	42%	17%
Café / restaurant	5%	9%	19%	11%	7%	17%	6%	10%
Grants	8%	5%	22%	4%	3%	7%	0%	8%
Events & Festivals	3%	6%	5%	14%	7%	5%	1%	3%
Private hires	3%	8%	5%	6%	2%	1%	3%	6%
Rental	2%	1%	8%	1%	1%	1%	0%	3%
Gifts	4%	2%	2%	3%	0%	0%	0%	0%
Concessions	4%	3%	1%	9%	0%	1%	0%	0%
Parking Fees	1%	2%	0%	4%	5%	1%	0%	2%
Annual memberships	1%	1%	2%	4%	0%	0%	0%	0%
Number of responses	28	22	14	8	7	7	9	16

3.3 Gross Profit

In this year's survey, questions were added to ask attractions about gross profit. In 2024, the total profit generated by respondents was €93m from 57 attractions who answered the question. Over half of the respondents reported a €0-€999,999 profit, with roughly a third reporting a profit of €1m+. A small percentage claimed they made a loss in 2024. Please note that two attractions were excluded from these figures, one which opened late December 2024 and one which was closed for the entirety of 2024.

The distribution of respondents by profit is shown below in figure 3.5, with the distribution split by Dublin and ROI outside of Dublin in figure 3.6. Proportionally, slightly more attractions outside of Dublin reported a loss. Dublin on average reported generating €2.5m in profit, with the remainder of the Republic of Ireland making €1.4m. We did not have sufficient responses from Northern Ireland attractions to report.

Figure 3.5 Distribution of respondents by gross profit

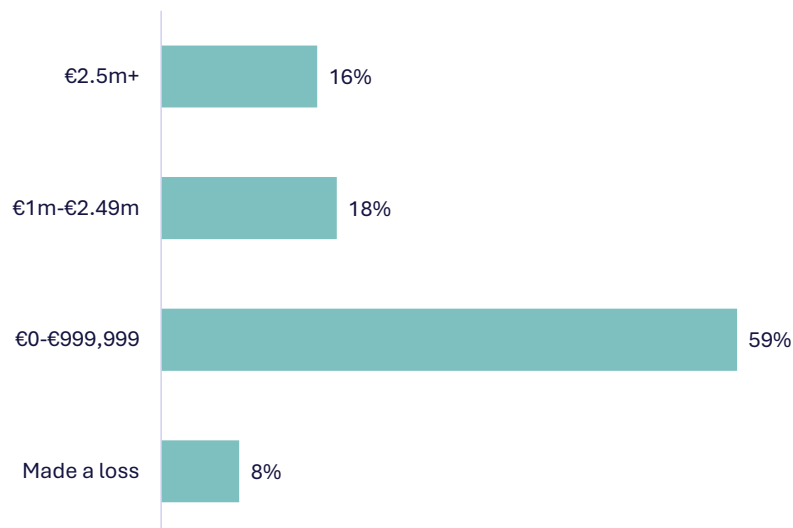
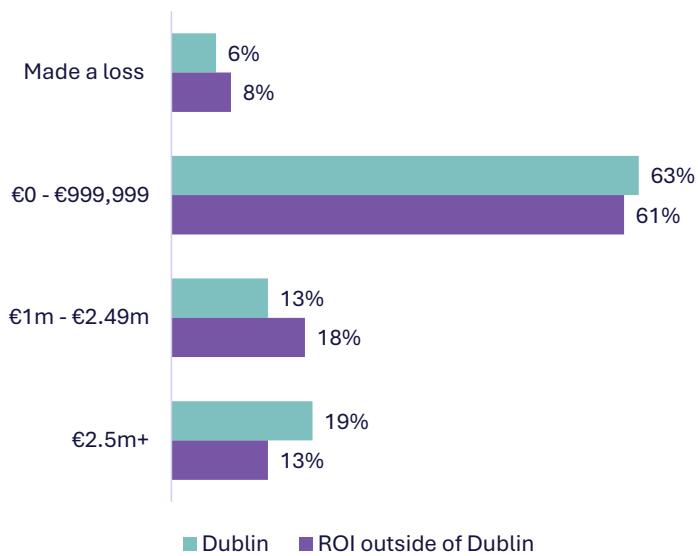


Figure 3.6 Distribution of Respondents by Gross Profit – Dublin vs. Non-Dublin



3.5. Prices and Yields

Survey respondents provided information on the average sale price per visitor, the average retail spend per visitor, and the average food and beverage spend per visitor. The results are shown in tables 3, 4 and 5 below.

The median values are also included in table 3. The median is the central value in a set of data and can be more representative than an average, which can be impacted by any anomalies. The median value is slightly below average for ticket sales and food and beverage sales, whilst being noticeably lower for retail spend, indicating visitors were less likely to buy retail across the different attractions.

Table 3: Average ticket, retail, and food & beverage sales per visitor, net of VAT

	Ticket Price	Retail Spend	F&B Spend
Average	€13.80	€9.46	€6.70
Median	€11.00	€4.00	€4.44

Table 3 indicates a potential total spend of €30 on average per customer when rounded to the nearest total (assuming an attraction that charges for admission and also has a retail and F&B offering). The total median is €19.44.

As shown in table 4, the average ticket prices and food & beverage spend were both higher in Dublin. The retail spend was however, on average, higher outside of Dublin.

Table 4 Average ticket price, retail and food & beverage spend by region

		2024	Dublin	ROI Outside Dublin	Northern Ireland
Ticket Price	Average	€13.80	€17.90	€12.70	€9.94
	Median	€11.00	€14.00	€10.00	€8.40
Retail Spend	Average	€9.46	€9.31	€11.33	€3.24
	Median	€4.00	€5.84	€5.00	€3.00
F&B Spend	Average	€6.70	€11.10	€5.96	€4.20
	Median	€4.44	€7.00	€4.15	€4.20

Table 5 shows that ticket and food & beverage sales were similar between attractions with 100,000 or fewer visitors and more than 100,000 visitors, but the latter gets particularly more sales from retail. The median is the central value in a set of data and can be more representative than an average as this can be impacted by any anomalies.

Table 5 Average ticket price, retail and food & beverage spend by number of visitors

		100,000 or fewer visitors	More than 100,000 visitors
Ticket Price	Average	€13.23	€13.90
	Median	€11.00	€10.00
Retail Spend	Average	€5.81	€12.15
	Median	€3.60	€6.92
F&B Spend	Average	€3.60	€6.92
	Median	€7.20	€5.30

3.6. Ticket Price Increases

The majority of attractions who charge for admission did not increase their ticket prices for 2025. Of those that did increase their ticket prices, over half increased by 1-5% and over a quarter increased by more than 10%.

Figure 3.5: Ticket price increases for 2025

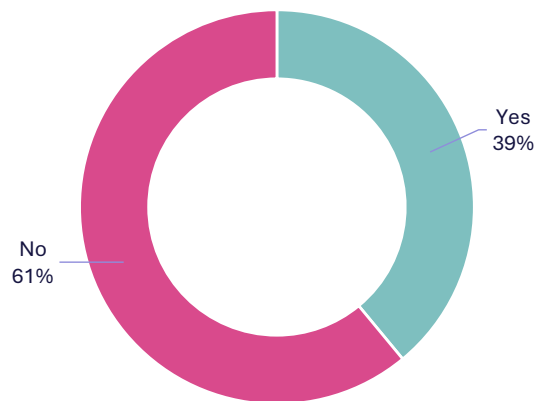
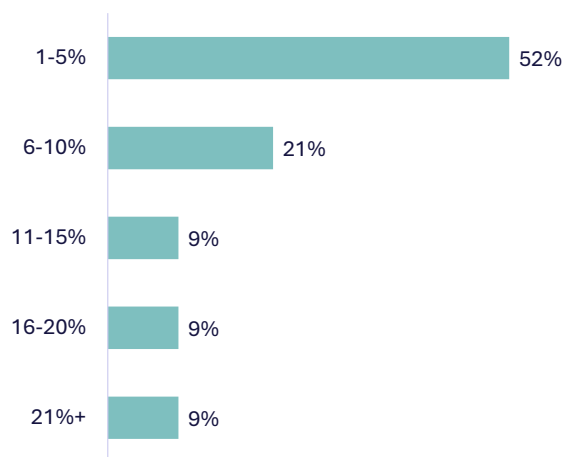


Figure 3.6: Average % of ticket price increases (amongst those who applied an increase)



86% of the respondents with attractions in Northern Ireland increased their prices for 2025. 35% of attractions in Dublin raised their ticket prices compared to 32% of the rest of the Republic of Ireland. The proportion applying ticket price increases was similar for attractions with fewer than 100,000 visitors (40%) versus those with more than 100,000 visitors (38%).

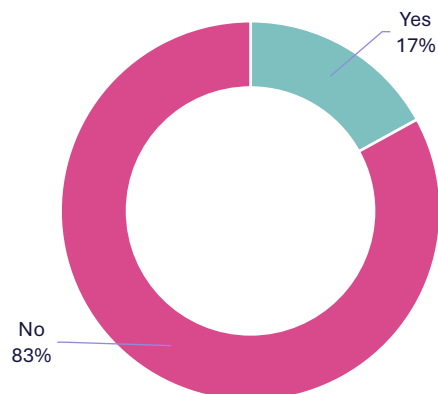
Table 6: Proportion applying a ticket price increase

Increase in ticket prices for 2025	Dublin	ROI outside of Dublin	Northern Ireland	100,000 visitors or less	More than 100,000 visitors
% Yes	35%	32%	86%	40%	38%

3.7. Variable Ticket Pricing

The vast majority of attractions didn't vary their pricing in response to demand peaks and troughs, with only 17% opting to vary their pricing. Attractions in Dublin were more likely to have variable pricing – 23% compared to 13% in both the rest of the Republic of Ireland and Northern Ireland. Similarly, 25% of attractions with more than 100,000 visitors reported variable pricing, with only 12% of attractions of fewer than 100,000 reporting variable pricing.

Figure 3.6 Variable Pricing



3.8. Annual Membership Retention Rate

A fifth of respondents stated they sold annual membership. Fewer attractions in Dublin offered annual membership (15%) compared to the rest of the Republic of Ireland (29%) and Northern Ireland (25%).

Figure 3.7: Percentage of sites offering Membership

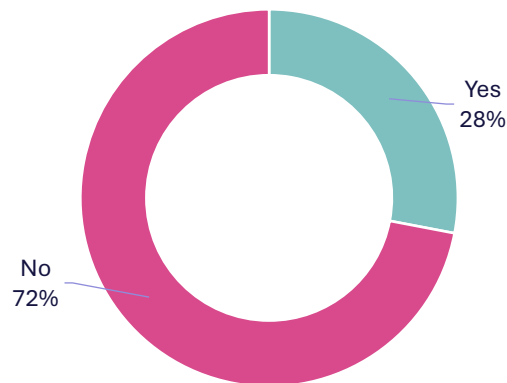


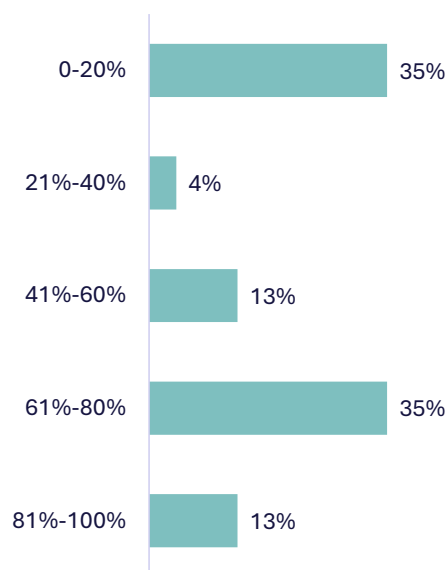
Table 7: Annual membership offerings by region

Offer annual membership	2024	Dublin	ROI outside of Dublin
Yes	28%	18%	33%
Number of respondents	83	28	51

NB: Northern Ireland had too low number of responses (4) to show results for this question.

Of those who offered annual membership, retention levels varied, of the 23 attractions who responded to the survey, 39% had a retention rate of under 40%.

Figure 3.8: Annual Membership Retention Rate



3.9. Breakdown of Operational Expenditure

Most attractions have an operational expenditure of less than 1 million euro, though a quarter have an operational expenditure of over 2.5 million euro. On average, attractions in Dublin reported the highest operational expenditure; however the median figure indicates this is higher outside of the Republic of Ireland. This is likely because there were a small number of attractions in Dublin that have a particularly high operational expenditure which pull the average up.

Figure 3.9: Distribution of operational expenditure

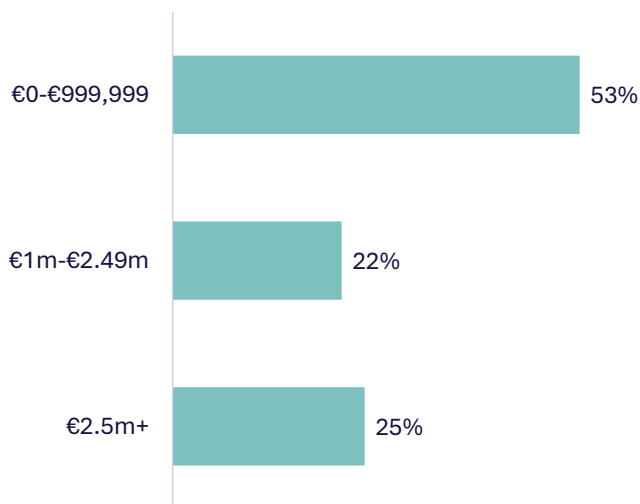


Table 8: Average and median operational expenditure by region

	2024	Dublin	ROI outside of Dublin
Average	€7,599,227	€18,688,765	€2,055,065
Median	€911,460	€1,071,218	€1,002,251
Number of respondents	59	20	36

As seen in figure 3.10, many attractions have reported an increase in operational expenditure versus 2023 . This is reflected across all locations, with over half of attractions with operational expenditure in Dublin and the rest of the Republic of Ireland reporting an increase of 10% or more.

Figure 3.10: Reported operational expenditure change versus 2023

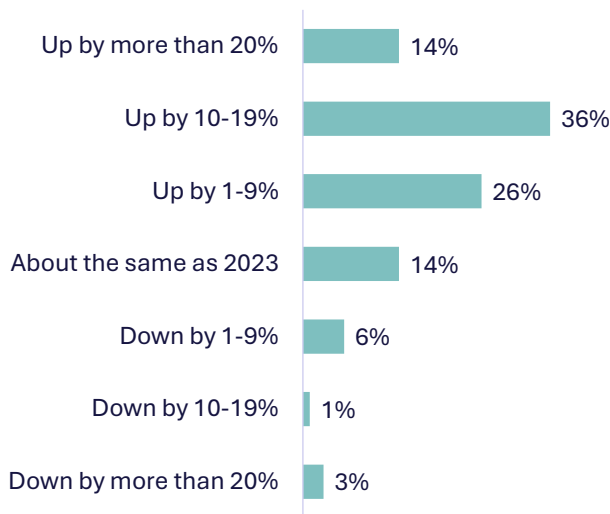


Table 9: Attractions with operational expenditure up by 10% or more by region

Attractions with OpEx up by 10% or more	
Dublin	54%
ROI excluding Dublin	51%

Over half of operational expenditure was staff costs, with the remaining categories significantly less by comparison. ‘Other’ predominantly included professional (accountancy, banking, legal, etc.) fees, IT and travel costs.

Figure 3.11: Breakdown of Operational Expenditure

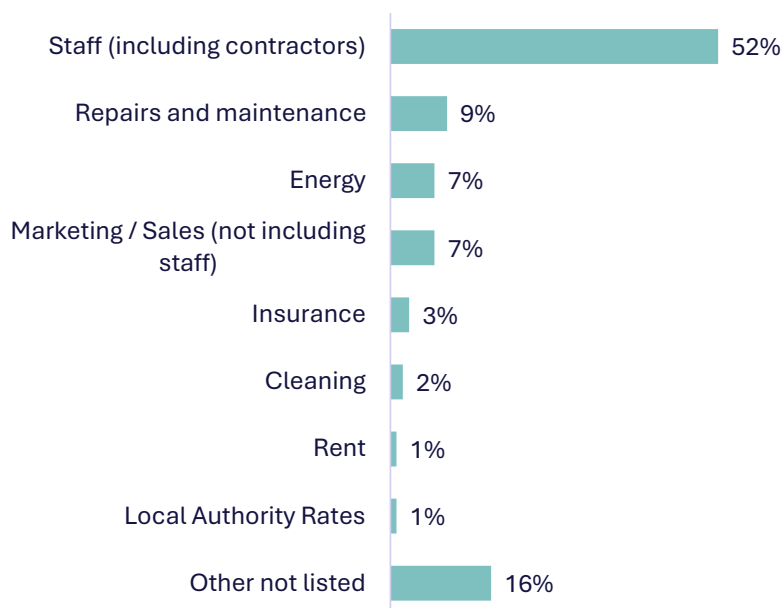


Figure 3.12 Breakdown of Operational Expenditure by region

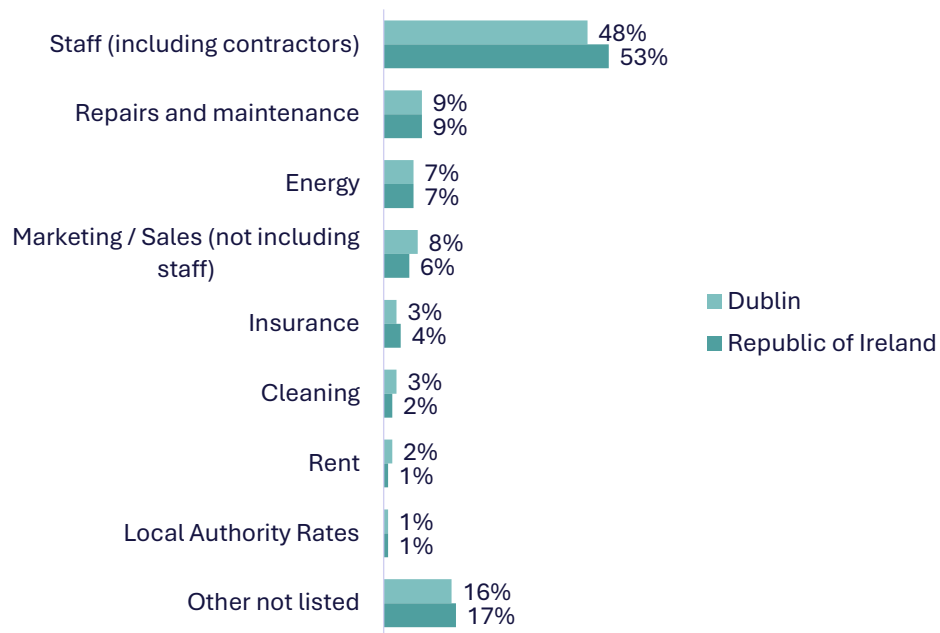


Figure 3.13 Breakdown of Operational Expenditure by number of visitors

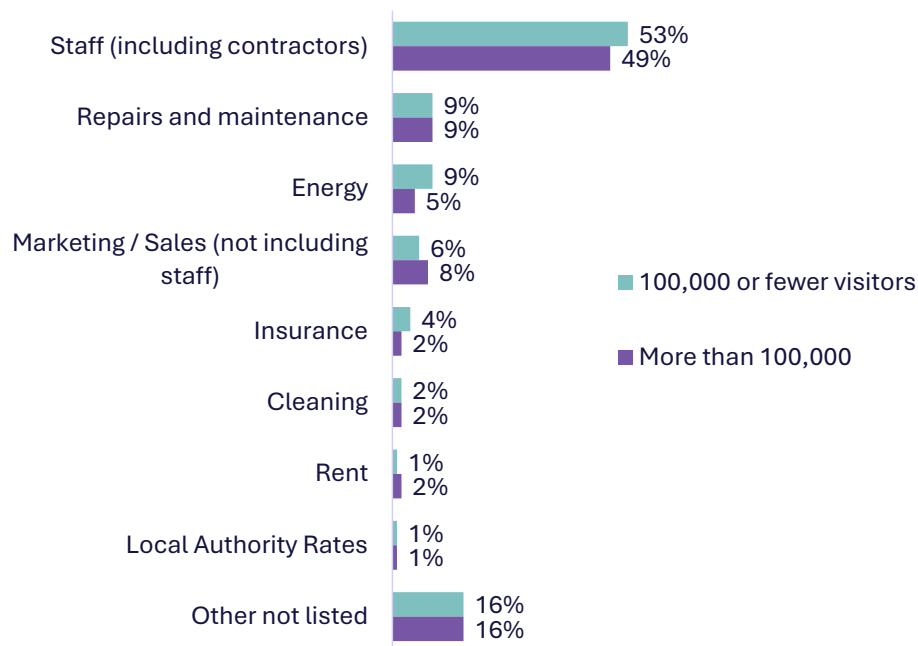
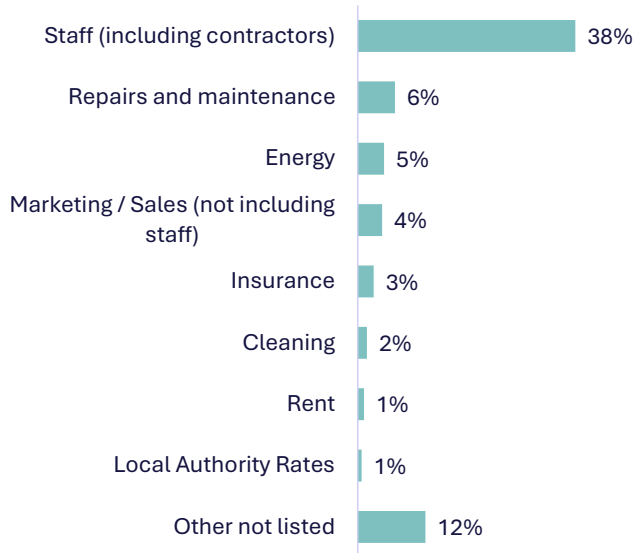


Figure 3.14: Breakdown of operational expenditure as a proportion of revenue

This year, we used the figures provided to the questions on revenue, operational expenditure and breakdown of operational expenditure to calculate the operational expenditure categories as a proportion of total revenue (above is shown as a proportion of operational expenditure). The data in the below chart is based on the 43 attractions who gave valid responses to all three of these questions.



3.10. VAT Registration

Most respondents said they were VAT registered (88%). VAT registration was higher amongst those charging for admissions (90%) than those not charging for admissions (79%).

Figure 3.15: VAT Registered

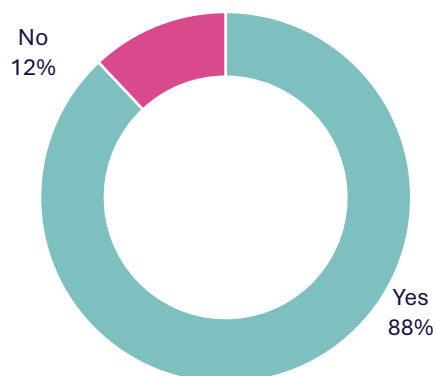


Table 10: VAT registration by admission charge status

	Charging for admissions	Not charging for admissions
Are VAT registered	90%	79%
Are not VAT registered	10%	21%

3.11. Insurance Renewal

Most respondents reported that their insurance premium has changed (74%) – of those, 96% reported an increase.

Figure 3.16: Insurance premium changes

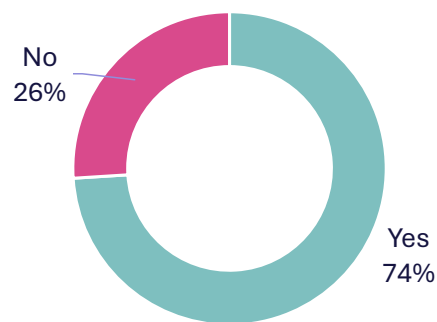
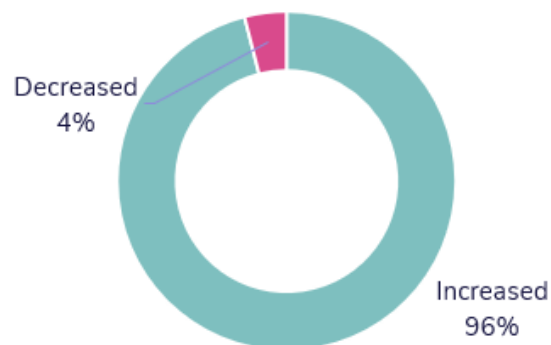
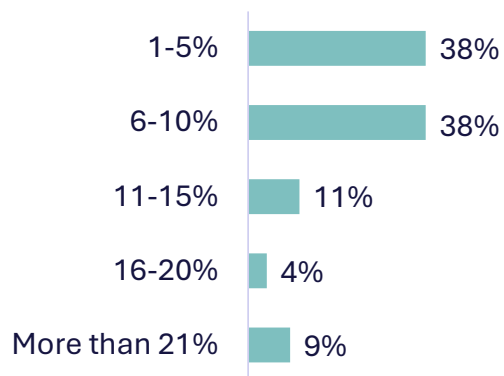


Figure 3.17 Insurance premium changes (amongst those who reported a change)



Of those respondents who said they had an increase, just over three quarters reported an increase of 1-10%. 9% reported an increase greater than 21% on the previous year's premium. The average increase was 12%. Attractions outside of Dublin had a higher average increase of 14%, whilst Dublin attractions had an average of 8%.

Figure 3.18: Distribution of insurance premium increases (amongst those who reported an increase)



4. Visitors

4.1. Number of Visitors Received in 2024

The number of visitors in 2024 was a total of 19,299,908. Dublin reported the most visitors, with a total of 10,104,053, the rest of the Republic of Ireland reported a total of 8,306,262 and Northern Ireland reported a total of 889,593. As a note, 33 Dublin respondents answered this question, compared to 53 from the Republic of Ireland outside of Dublin and 7 from Northern Ireland, which explains the lower number for Northern Ireland, but highlights Dublin attractions are attracting more visitors than the rest of ROI.

Table 11: Distribution of visitor numbers

Visitors	No. of Sites	%
Up to 49,999	33	35%
50,000-110,000	19	20%
110,000-249,999	19	20%
250,000-499,000	8	9%
500,000+	14	15%

In a like-for-like comparison (respondents were asked to complete visitor numbers for 2023 as well as 2024) we can see an increase in visitor numbers from 2023 to 2024 as shown in figure 4.1. With attractions in Dublin seeing a slightly higher proportional increase as shown in table 12.

Figure 4.1: Total visitor numbers for 2023 and 2024 for attractions surveyed

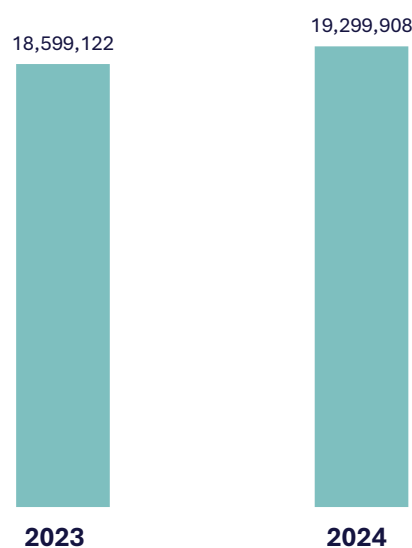


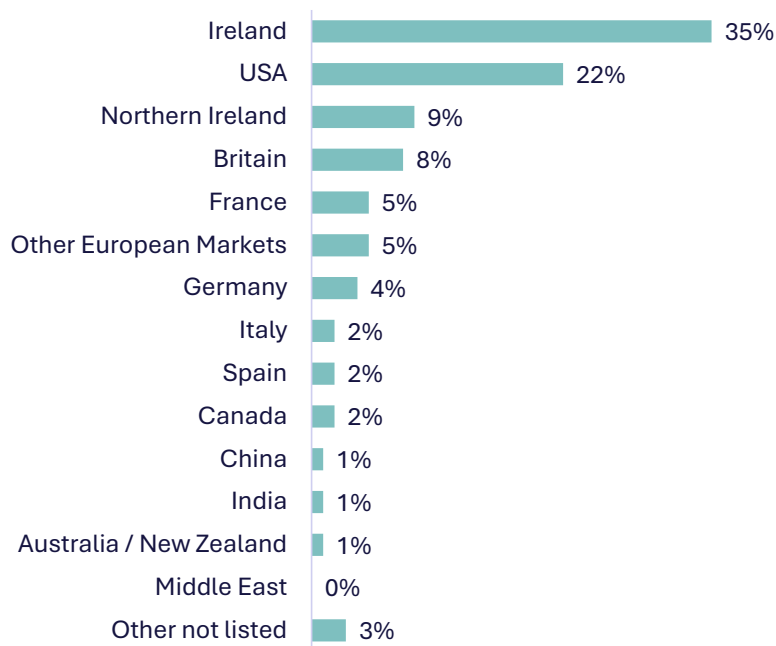
Table 12: Total visitor numbers, difference and proportional increase – by region

	2024	Dublin	ROI outside of Dublin	Northern Ireland
2024	19,299,908	10,104,053	8,306,262	889,593
2023	18,599,122	9,702,919	8,019,947	876,256
Difference	+700,786	+401,134	+286,315	+13,337
Proportional increase between 2023 and 2024	+3.8%	+4.1%	+3.6%	+1.5%
Number of respondents	93	33	53	7

4.2. Origin of Visitors

Most visitors for all attractions in 2024 came from ROI (35%). After the domestic market, the U.S. (22%) and Britain (8%) are top tourists across the attractions.

Figure 4.2: Origin of visitors by source market



61% of visitors of attractions in Northern Ireland are from Northern Ireland, showing the significant importance of domestic tourism there. Comparatively, almost half of all visitors to attractions in the Republic of Ireland outside of Dublin are from the Republic of Ireland. This drops to one-quarter of visitors to attractions in Dublin coming from ROI. One-quarter of visitors to attractions in Dublin and the Republic of Ireland come from the USA and Canada combined, but these markets make up less than 6% for Northern Ireland sites. British tourists make up around 1 in 10 visitors to Northern Ireland (11%) and Dublin (10%) but proportionally fewer for ROI outside of Dublin.

Table 13: Origin of visitors by source market – by region

	Dublin	ROI outside of Dublin	Northern Ireland
Ireland	26%	47%	13%
USA	23%	23%	5%
Northern Ireland	3%	4%	61%
Britain	10%	6%	11%
France	8%	4%	<1%
Other European markets	8%	4%	5%
Germany	4%	3%	1%
Italy	4%	2%	<1%
Spain	3%	2%	<1%
Canada	3%	2%	<1%
China	1%	1%	<1%
India	1%	<1%	<1%
Australia / New Zealand	1%	1%	1%
Middle East	1%	<1%	<1%
Other not listed	5%	2%	3%
Number of respondents	30	41	7

4.3. Visitor Ticket Categories

The ticket categories for most attraction sales come from individual ticket sales (64%), followed by group tours (12%) and education groups (8%). Note that individual ticket sales include tickets that are not full price – concessions etc. Proportionally more ticket sales in Northern Ireland come from individual ticket sales (82%) and are more frequent in Dublin (68%) than the rest of the Republic of Ireland (58%). Group tours were reported more commonly in the Republic of Ireland outside of Dublin (15%) than in Dublin (8%) and Northern Ireland (3%).

Figure 4.6: Distribution of admissions by ticket category

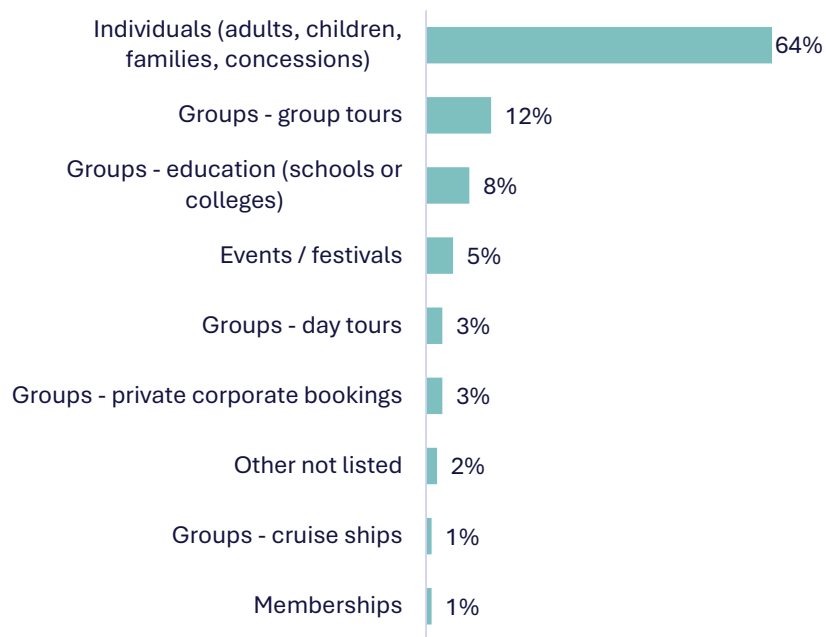
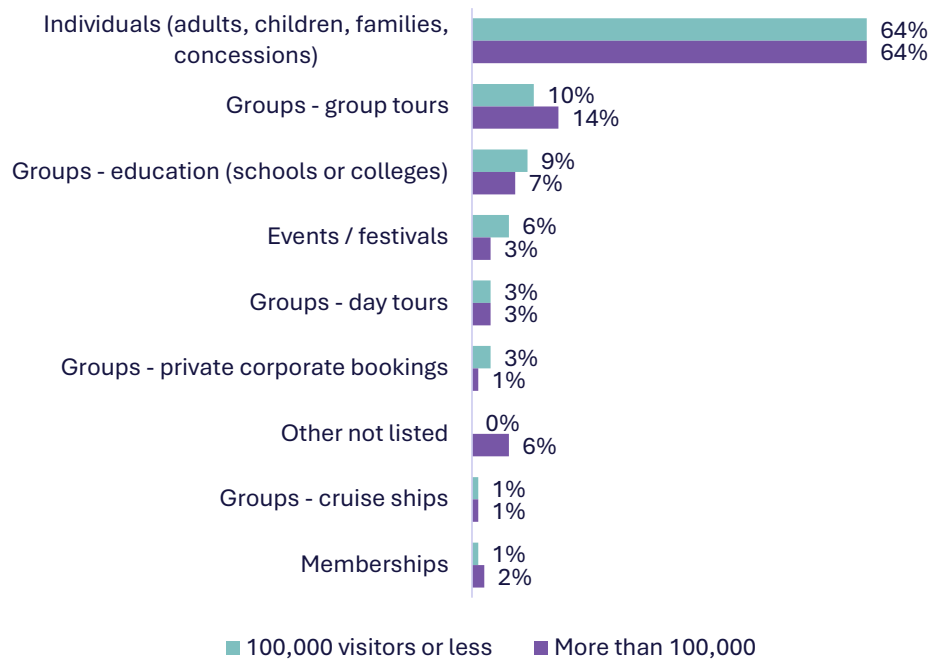


Figure 4.7: Distribution of Admissions by Ticket Category (100,000 or fewer vs. more)



4.4. Seasonality

The number of tourists is heavily skewed towards May-September across all areas. This is particularly high for ROI attractions outside of Dublin (65%). This is reflective of the general seasonality of tourism in Ireland, which is more pronounced in the regions.

Figure 4.8 Seasonal distribution of admissions

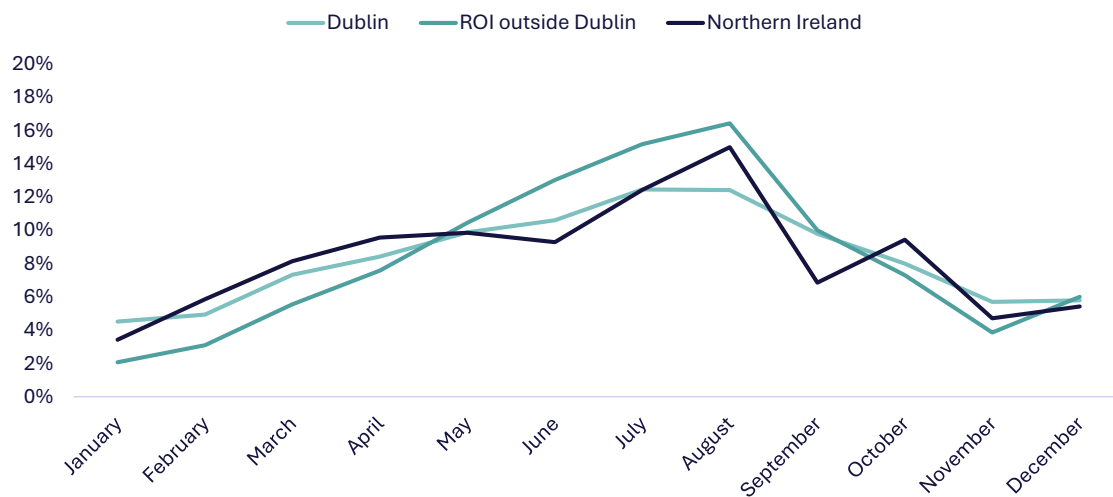


Table 14: Proportion of admissions between May-September by region

	Dublin	ROI outside of Dublin	Northern Ireland
May-September	55%	65%	53%

5. Your Staff

5.1. Number of Staff Employed

A total of 88 respondents answered this question and employed a total of 5,880, an average of 67 per site. The majority of staff were full-time members (42%), followed by a little over a quarter being part-time (27%), one quarter being seasonal (24%) and 7% being volunteers. The vast majority of management staff are employed at a full-time level (75%), compared with around a third of other staff members (37%). Over half of other staff are employed as part-time or seasonal (56%).

Figure 5.1: Employee contract split across all employees

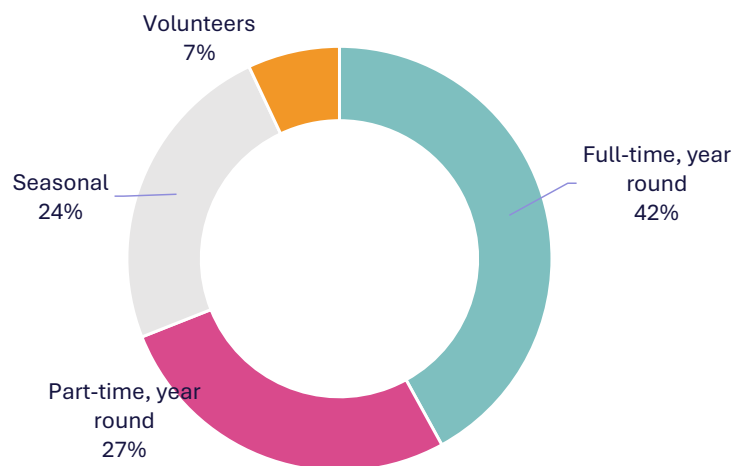
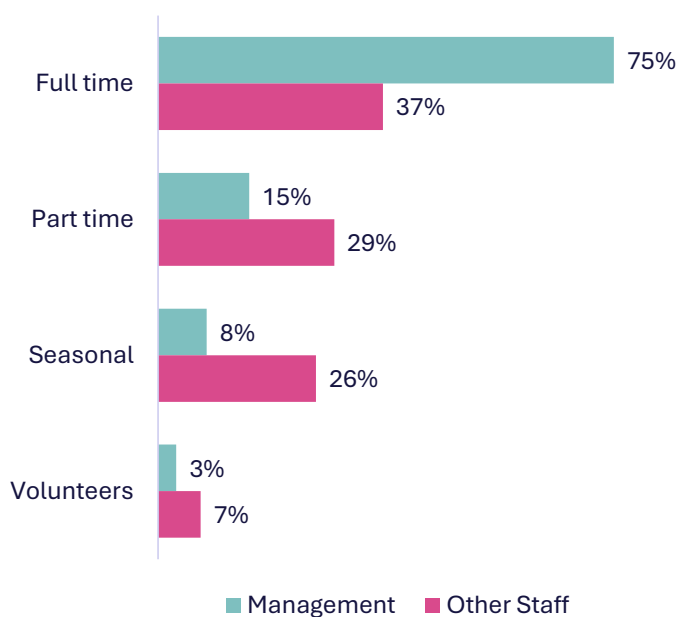


Figure 5.2: Employee contract split between management and other staff



5.2. Principal Obstacles to the employment of new staff in 2025

Respondents were asked to identify and rank the principal barriers to the recruitment of new staff in 2025. The table below indicates the results, showing pay to be the largest barrier in both inside and outside of Dublin. Skill shortages was ranked more highly in Dublin, while seasonality of employment was reported as more of a barrier for attractions in ROI outside of Dublin.

Table 15: Obstacles to recruitment – by region

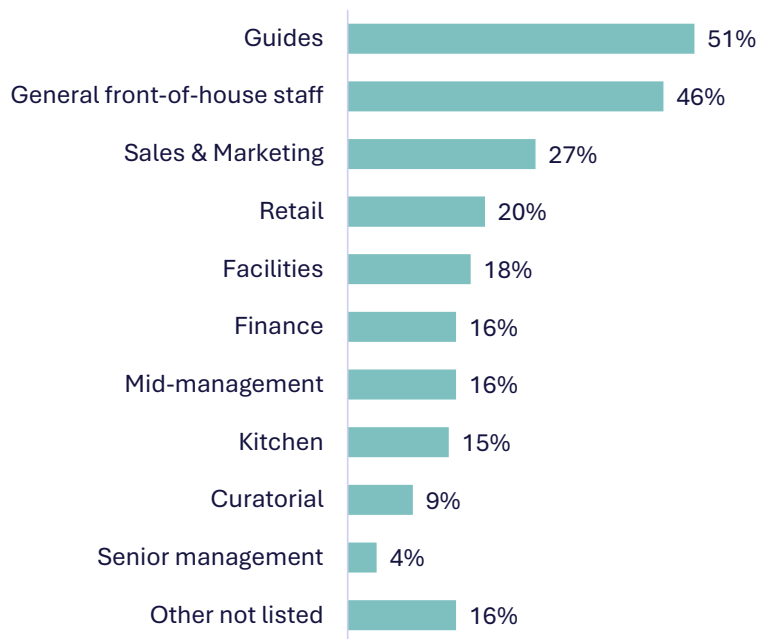
Ranking	2024	Dublin	ROI outside Dublin
Pay	1	1	1
Lack of candidates	2	3	2
Seasonality of employment	3	6	3
Skill shortages	4	2	5
Accommodation for staff	3	2	4
Working hours	6	4	6
Competition from other tourism businesses	5	5	5

(Other issues mentioned included: uncertainty over the trading environment for 2025, increase to minimum wage, difficulty finding candidates with a genuine desire to work in tourism / hospitality)

5.3. Principal Needs regarding recruitment of staff in 2024

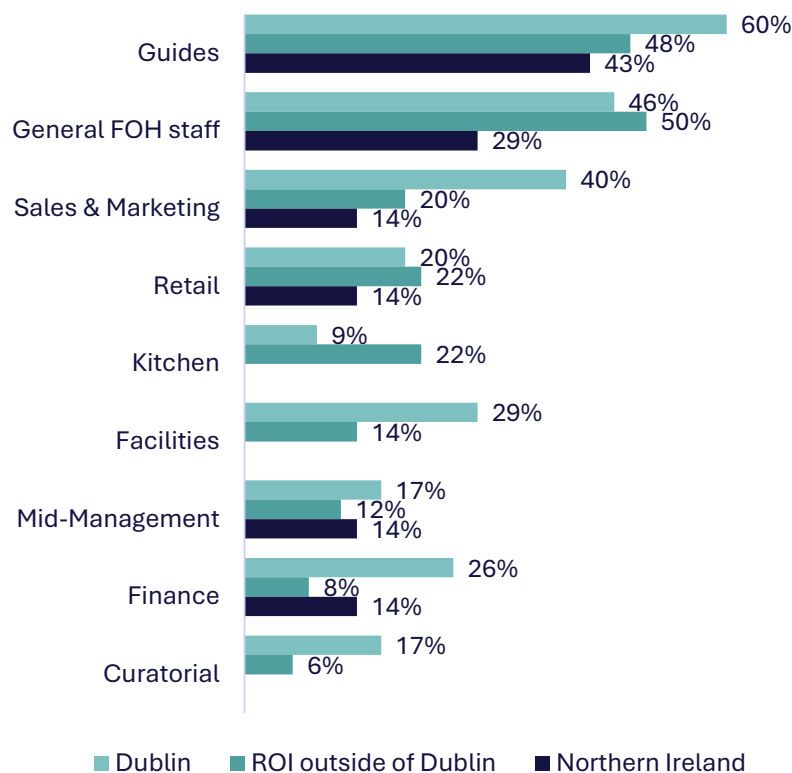
Guides and general front of house staff are the top recruitment needs across attractions that responded to the survey this year.

Figure 5.3 Principal needs regarding recruitment of staff in 2024



Guides are particularly noted as a need in Dublin (60%) and just over half of the rest of Republic of Ireland ranked general front of house staff as a primary need (51%). Sales and marketing is particularly noted as a need in Dublin (40%), along with finance (26%).

Figure 5.4: Principal needs regarding recruitment of staff – by region



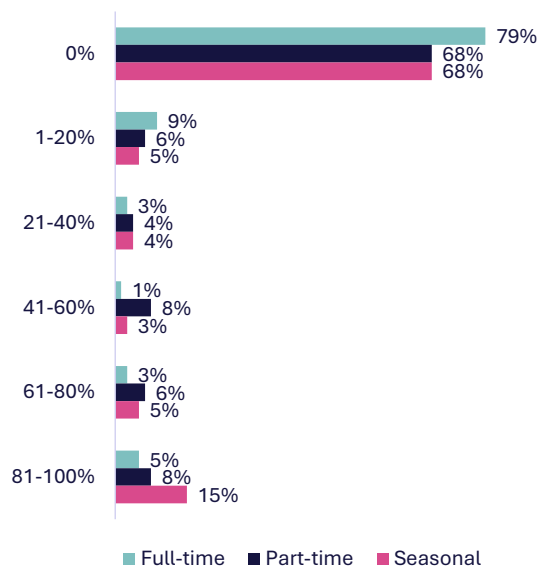
6. Staff Remuneration

This was the second year that questions were asked in relation to staff remuneration at member attractions.

6.1. National Minimum Wage

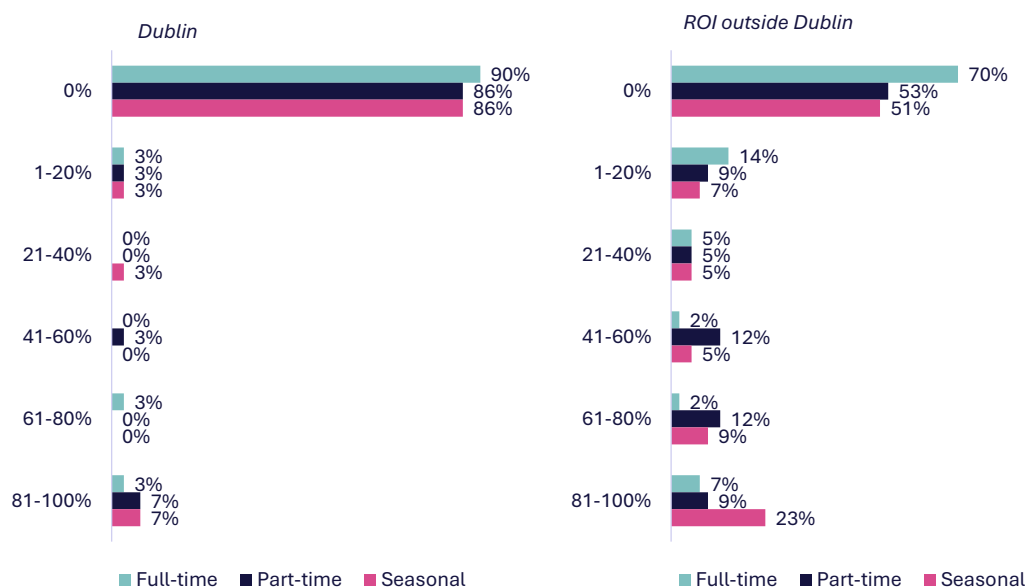
Figure 6.1 shows the percentages of the respondents' staff on minimum wage. It indicates that the majority of full-time staff were paid above minimum wage across the attractions.

Figure 6.1: Distribution of staff on minimum wage



Staff of attractions in Dublin are significantly less likely to be paid minimum wage than attractions in Republic of Ireland outside of Dublin.

Figure 6.2: Distribution of staff on minimum wage – by region



6.2. Hourly Rate of Pay

The pay range for the different staff categories are shown in Table 16. 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 16: Average hourly rate of pay by category

	Range of Hourly Rate of Pay	Low End	High End
AVERAGE	Front of house / visitor services staff	€13.98	€16.02
	Guides	€14.68	€17.16
	Maintenance	€15.53	€18.65
	Admin. Assistants	€15.29	€17.61
	Gardeners	€14.92	€16.31
	Team leaders / supervisors	€17.02	€19.53
MEDIAN VALUE	Front of house / visitor services staff	€13.70	€15.00
	Guides	€13.65	€15.70
	Maintenance	€14.87	€17.02
	Admin. Assistants	€14.63	€17.49
	Gardeners	€14.50	€16.63
	Team leaders / supervisors	€16.29	€18.25

The data shows that employees working for Dublin attractions earn more than their counterparts in attractions outside of Dublin.

Table 17: Average hourly rate of pay – by region

		Low End				High End	
		Dublin	ROI outside Dublin			Dublin	ROI outside Dublin
AVERAGE	Front of house / visitor services staff	€14.95	€13.31	AVERAGE	Front of house / visitor services staff	€17.18	€15.43
	Guides	€16.59	€13.37		Guides	€20.17	€15.40
	Maintenance	€17.44	€14.88		Maintenance	€20.59	€18.06
	Admin. Assistants	€16.18	€14.48		Admin. Assistants	€19.09	€16.81
	Gardeners	€15.64	€14.68		Gardeners	€14.90	€16.61
	Team leaders / supervisors	€18.18	€16.11		Team leaders / supervisors	€20.87	€18.78
MEDIAN VALUE	Front of house / visitor services staff	€14.00	€13.17	MEDIAN VALUE	Front of house / visitor services staff	€15.24	€14.74
	Guides	€14.10	€13.14		Guides	€16.00	€14.77
	Maintenance	€17.98	€14.00		Maintenance	€20.00	€17.00
	Admin. Assistants	€16.04	€14.00		Admin. Assistants	€18.49	€17.00
	Gardeners	€14.93	€14.50		Gardeners	€16.00	€16.87
	Team leaders / supervisors	€17.37	€15.00		Team leaders / supervisors	€19.66	€16.74

6.3. Range of Annual Salary

Similarly to hourly rates of pay, salaried employees in Dublin also earned significantly more than those employed in attractions outside of Dublin. This was particularly true of those employed in higher positions, such as heads of departments.

Table 18: Average range of annual salary by category

	Range of Salary	Low End	High End
AVERAGE	General manager / CEO	€66,219	€81,757
	Heads of department	€63,648	€81,757
	Assistant heads of department	€38,745	€49,887
	Marketing executives	€39,123	€45,716
	Accountants	€46,390	€60,474
	Curators	€42,155	€54,021
MEDIAN VALUE	General manager / CEO	€62,500	€68,000
	Heads of department	€45,000	€68,000
	Assistant heads of department	€37,400	€50,000
	Marketing executives	€39,000	€44,000
	Accountants	€45,000	€61,000
	Curators	€36,000	€52,000

Table 19: Average range of annual salary by category – by region

		Low End				High End	
		Dublin	ROI outside Dublin			Dublin	ROI outside Dublin
AVERAGE	General manager / CEO	€86,580	€58,271	AVERAGE	General manager / CEO	€103,954	€73,777
	Heads of department	€58,272	€67,949		Heads of department	€103,954	€73,777
	Assistant heads of department	€45,266	€34,003		Assistant heads of department	€56,011	€45,433
	Marketing executives	€39,425	€38,669		Marketing executives	€46,493	€45,272
	Accountants	€50,964	€43,849		Accountants	€64,096	€58,827
	Curators	€46,481	€36,100		Curators	€64,794	€45,044
MEDIAN VALUE	General manager / CEO	€80,000	€56,500	MEDIAN VALUE	General manager / CEO	€100,000	€65,000
	Heads of department	€55,877	€38,000		Heads of department	€100,000	€65,000
	Assistant heads of department	€45,605	€31,000		Assistant heads of department	€60,626	€40,000
	Marketing executives	€39,000	€37,500		Marketing executives	€45,000	€44,000
	Accountants	€50,000	€45,000		Accountants	€60,000	€62,000
	Curators	€38,000	€36,000		Curators	€65,000	€44,000

6.4. Average Percentage Salary Increase Applied in 2025 vs. 2024

For most staff not on national minimum wage, they will be receiving a 1-5% salary increase. However, a quarter of staff working in attractions outside of Dublin will receive no increase in 2025.

Figure 6.3: percentage of average salary increase

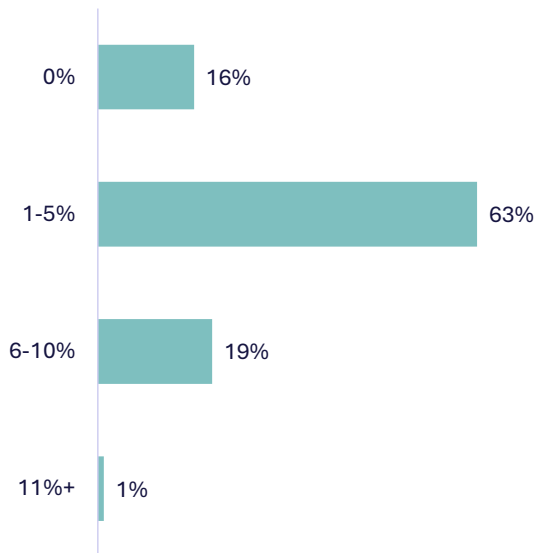
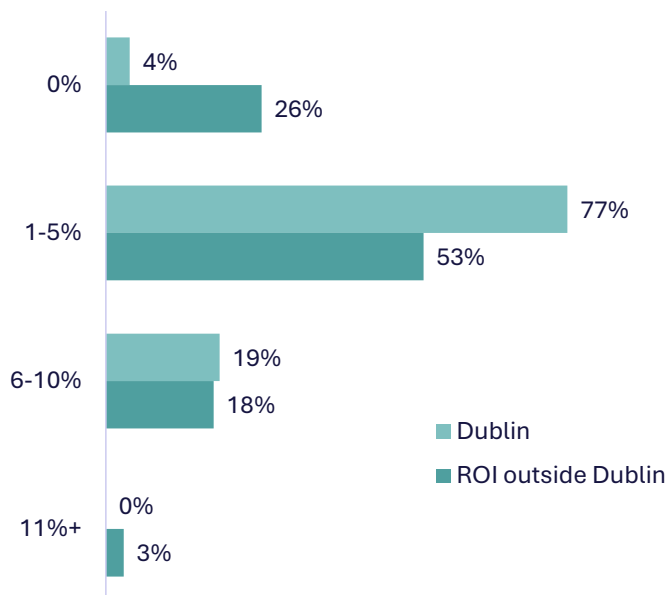


Figure 6.4: percentage of average salary increase – by region



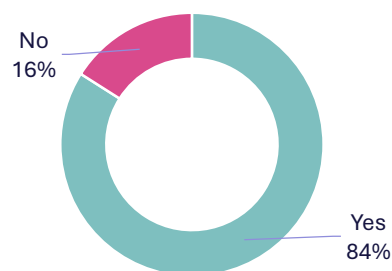
7. Online Booking System

The following charts and tables indicate the proportion of respondents who have online booking systems, the status of these systems and their integration with other systems.

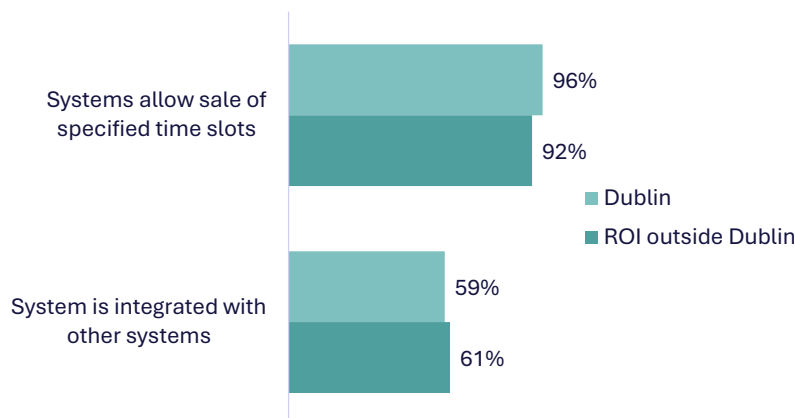
7.1. Proportion of Sites with an Online Booking System

Most attractions who responded to the survey have an online booking system, and those systems generally allow specific time slot sales, along with some integration with other systems. 84% have an online booking system, and this is very consistent across Dublin, the Republic of Ireland and Northern Ireland.

Figure 7.1 Proportion of sites with an online booking system



7.2. Ticket Sales Systems



7.3. Proportion of Tickets Sold Online in 2024

Around one-third of sales currently come from online bookings, and the vast majority of attractions expect this to increase. An average of 35% tickets were sold in 2024 amongst those attractions with an online booking system, with a greater proportion of tickets sold online for Dublin attractions (43%) and attractions in Northern Ireland (53%) than in ROI outside of Dublin (28%). The overall pattern is largely unchanged from previous year (2023) which similarly reported that 33% of tickets were sold online.

Figure 7.3: Distribution of % of tickets sold online in 2024

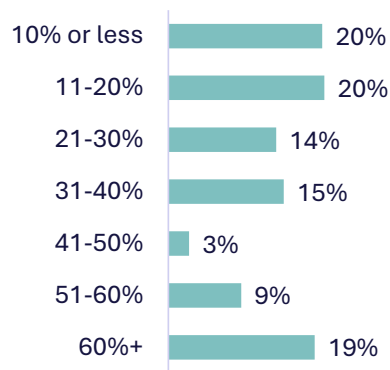


Figure 7.4: Distribution of % of tickets sold online in 2024 – by region

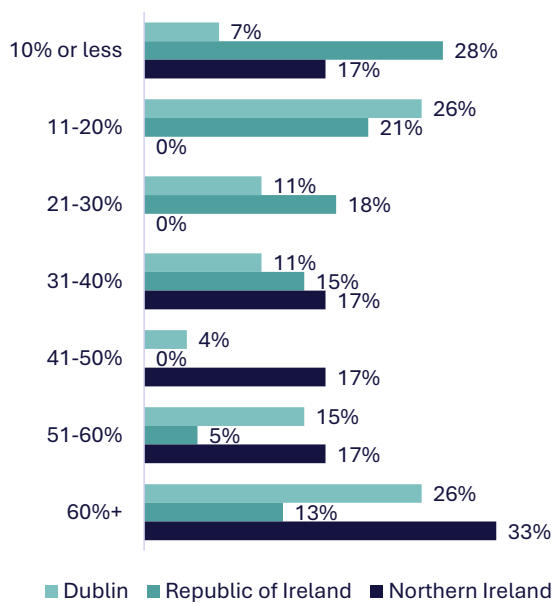


Figure 7.5: Distribution of % of tickets sold online in 2024 – by number of visitors

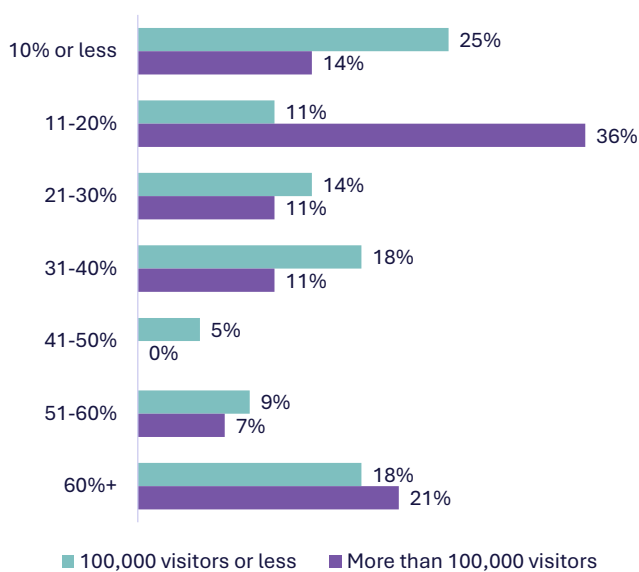
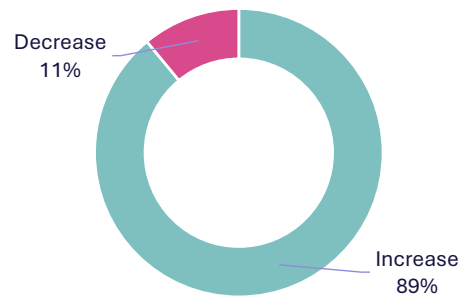


Figure 7.6 Do you expect this to increase or decrease in 2025?



The reasons why attractions thought online ticket sales would increase were:

- Increased marketing activity and promotion of online booking facilities
- Increasingly better price for customers who book online versus the gate price
- More people choosing to book online in advance

The reasons why attractions thought online ticket sales would decrease was:

- Increased cost of living driving fewer sales
- Fewer events in 2025
- Slow tourism season for 2025
- Businesses actively encouraging more walk-ups

8. Final Observations

8.1 Outlook for 2025

Thinking to the future, businesses on the whole are feeling positive, but few are feeling very positive. A total of 46% feel quite positive, whilst only 7% are feeling very positive. Around a third of attractions are feeling neutral towards the year ahead. Over half of Dublin respondents felt very or quite positive, whilst slightly under half of respondents in Northern Ireland and Republic of Ireland felt very or quite positive.

Figure 8.1: Outlook for 2025

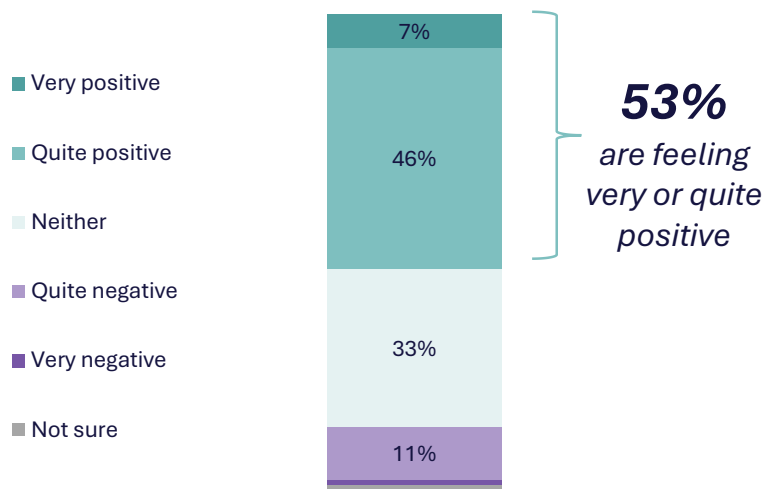


Table 20: Outlook for 2025 – by region

	Dublin	ROI excluding Dublin	Northern Ireland
% feeling very or quite positive	62%	47%	43%
% feeling very or quite negative	12%	9%	43%
% feeling <u>very</u> positive	6%	2%	29%
% feeling quite positive	56%	41%	14%
% feeling neither	26%	40%	14%
% feeling quite negative	12%	11%	43%
% feeling very negative	0%	2%	0%
% Not sure	0%	4%	0%
Number of respondents	34	47	7

8.2. 'Best Guess' Projections

Most businesses have a generally positive outlook for 2025 – roughly three quarters of businesses expect an increase in revenue, and two thirds of businesses expect an increase in visitors.

Figure 8.2: Expectations for visitor numbers for 2025



Figure 8.3: Expectations for visitor number changes in 2025

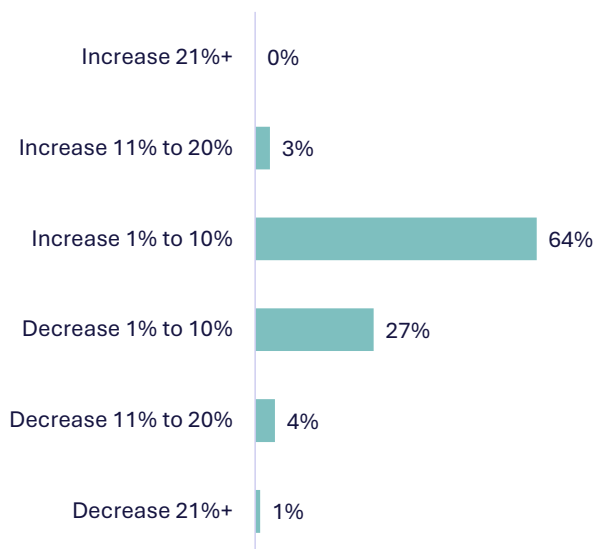


Figure 8.4: Expectations for revenue for 2025

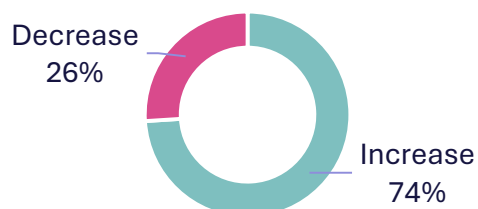
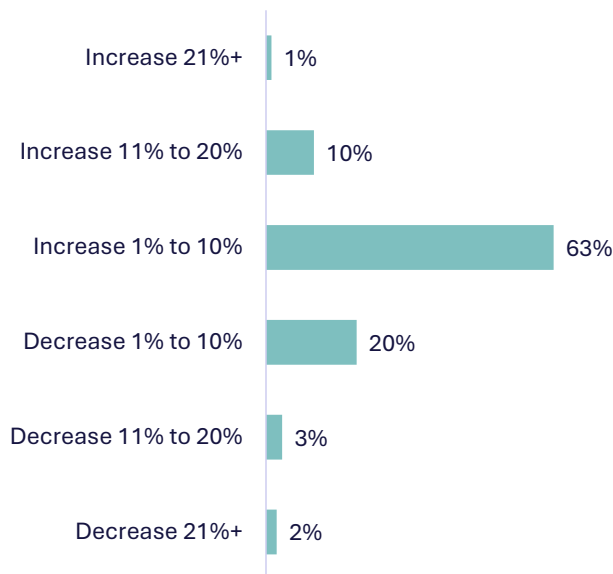


Figure 8.5: Expectations for revenue changes for 2025



8.3. Key Factors Influencing Outlook for 2025

The key factors listed by respondents as influencing their outlook for 2025 are the following:

Internal:

- Many attractions report fears of staffing shortages, retaining skilled staff and pressures from national minimum wage increases alongside rising inflation
- Rising operating and labour costs have led to ticket price increases, leading to some attractions increasing cost in most areas
- For 2025, attractions want to enhance their marketing, introduce new leadership and create new products/events. They want to improve their strategy and continue to build on investments in marketing.
- On a similar note, attractions are investing in retail, tour, event and food offerings to continue improving the visitor experience.
- Some attractions are also undergoing maintenance or relocation, which might limit growth in revenue and deter visitors in the short-term.
- Visitor levels are currently uncertain, with some attractions seeing advanced bookings for 2025, whilst others are experiencing cancellations and less engagement.

External:

- Attractions expect that Ireland will continue to be viewed as an expensive destination for tourists and ever-growing cost of living pressures will continue to

negatively impact visitation levels, both domestically and internationally. They expect that this might mean that visitors become more price-sensitive and value-focused when choosing their destination.

- Political instability, especially in the United States, is anticipated to heighten traveller uncertainty and lead to a decline in international travel from both the UK and US. While this is also a concern in Dublin, it is most frequently noted by attractions in other parts of the Republic of Ireland.
- Climate change is expected to have an impact - unseasonal or poor weather acts as a disruption to visitor numbers and can cause unplanned closures.
- Disruptions in both regional and international modes of transport and lack of availability of accommodation is expected to act as a deterrent for visitors. Dublin Airport's passenger cap was mentioned by attractions in Dublin as a possible deterrent to the growth of international tourism.
- Some respondents are hopeful that campaigns from the wider tourism industry in Ireland will help boost their attraction.

8.3. Priorities for AVEA for 2025/2026

Key recommendations and priorities for AVEA from their members are the following:

- Advocate for a reduction in VAT for visitor attractions, as well as insurance cost reductions and fair wage policies
- Promote the value of tourism to the economy at a policy level and consider the value of both urban and rural operators in funding schemes
- Facilitate member support and networking through events, encouraging collaboration and supporting with staffing and training
- Continue to share visitor trends and data to offer insight into domestic and international markets
- Support members with long-term planning around sustainability and economic or climate changes.

Appendices

Appendix 1: List of AVEA 2024/2025

14 Henrietta Street	Knappogue
Achill Experience Aquarium and Visitor Centre	Kylemore Abbey and Gardens
Adare Heritage Centre	Lismore Heritage Centre
Aillwee Burren Experience	Living Youghal / Youghal Clock Gate Tower
Airfield Estate	Loop Head Lighthouse
An Díseart	Lough Boora Discovery Park
Annesley Gardens and Arboretum	Lough Gur Heritage Centre
Ardgillan Castle	Lough Key Forest & Activity Park
Arigna Mining Experience	Lullymore Heritage Park
Armagh Observatory and Planetarium	Malahide Castle & Gardens
Athlone Castle and Luan Gallery	Midleton Distillery Experience
Avoca Mill	Mount Congreve
Belvedere House	Muckross House, Gardens & Traditional Farms
Beyond the trees Avondale	MoLI – Museum of Literature Ireland
Birr Castle Demesne	Museum of Medieval Kilkenny
Blarney Castle & Gardens	Nano Nagle Place
Bunratty Castle & Folk Park	National Gallery of Ireland
Burren Smokehouse Visitor Experiences	National Library of Ireland
Butler Gallery	National Museum of Ireland - Archaeology
Caherconnell Fort & Sheepdogs	National Museum of Ireland - Decorative Arts and History
Canal Boat Restaurant	National Museum of Ireland - Museum of Country Life
Castletown House	Newbridge Silverware Experience
Chester Beatty	Oakfield Park
Christ Church Cathedral Dublin	OPW Donegal Castle
Cliffs of Moher	OPW Dublin Castle
Clondalkin Round Tower	OPW Dún Aonghasa
Clonfert Farm	OPW Kilkenny Castle
Cobh Heritage Centre	OPW Kilmainham Gaol
Craggaunowen	OPW National Botanic Gardens
Cuilcagh Lakelands Geopark	OPW Newgrange Brú na Bóinne
Dalkey Castle & Heritage Centre	OPW Ross Castle
Discover Limerick DAC King John's Castle	Patrick Kavanagh Centre
Doolin Cave	Pearse Lyons Distillery
Doolin Ferry	Powerscourt Distillery Ltd.
Dublin Bay Cruises	Powerscourt House & Gardens, and Waterfall
Dublin Discovered Boat Tours	Roe & Co Distillery
Dublin Liberties Distillery	Rothe House & Garden
Dublinia	Russborough House & Parklands
Dunbrody Famine Ship Experience	Saint Patrick's Cathedral
Emerald Park	Shackleton Experience
Enniscorthy Castle and the National 1798 Rebellion Centre	Shannon Aviation Museum

EPIC The Irish Emigration Museum	Skerries Mills
Experience Glasnevin	Slane Distillery Visitor Centre
Fanad Lighthouse	Slane Castle
Fota House, Arboretum and Gardens	Sliabh Liag Experience
Foxford Woollen Mills	Smithwick's Experience Kilkenny
Foynes Flying Boat Museum	St Canice's Cathedral & Round Tower
GAA Museum and Croke Park Tours	St Nicholas' Collegiate Church
Game of Thrones Studio Tour	Strokestown Park House and Gardens, and National Famine Museum
Glenarm Castle	Swords Castle
GPO Museum	Teeling Whiskey Distillery
Guinness Storehouse	The Abbey Theatre
Hillsborough Castle and Gardens	The Gobbins
Hook Lighthouse	The Irish Rocknroll Museum Experience
House of Waterford Crystal	The National Leprechaun Museum
Howth Cliff Cruises	The National Wax Museum Plus
Hugh Lane Gallery	The Shed Distillery of PJ Rigney
Hunt Museum	Thoroughbred Country
IMMA - Irish Museum of Modern Art	Titanic Experience Cobh
Irish National Heritage Park	Tower Museum, Derry
Irish National Stud & Gardens	Trinity College Dublin & The Book of Kells
Irish Whiskey Museum	Valentia Island Lighthouse
Jameson Distillery Bow Street	Vandeleur Gardens
Johnstown Castle	Vintage Tea Trips
Kilbeggan Distillery	Westport Estate
Killarney Brewing & Distilling Co	Wicklow Historic Gaol
Killary Fjord Boat Tours	World of Illusion

Appendix 2: List of non-members who were invited to the survey

Crawford Art Gallery	Ulster Folk Museum
Navan Centre, Armagh County Museum, FE McWilliam Gallery	Ulster Museum
National Museums NI	Ulster Transport Museum
Peacemakers Museum	W5 Science and Discovery Centre
Spike Island Development Company	Wild Atlantic Distillery
Ulster American Folk Park	

Appendix 3: List of survey questions asked in 2024

Section A : About your attraction

Q1: Name of visitor experience / attraction

Q2a: Questionnaire completed by

Q2b: Please enter your job title

Q3c: Where is your attraction based?

a) Republic of Ireland b) Northern Ireland

Slocation: In which county is your attraction based?

Q3b: And would you describe your attraction's location as...

a) Urban b) Suburban c) Rural

Q3a: In which tourism region is your attraction located?

a) Wild Atlantic Way b) Ireland's Hidden Heartlands c) Ireland's Ancient East
d) Dublin e) Northern Ireland

Q4: Which category best describes your attraction?

a) Historic site b) Visitor heritage centre c) Museum / gallery d) Visitor garden
e) Zoo, aquarium or open farm f) Natural attraction g) Brand experience
h) Heritage park, leisure or theme park i) Other (please specify)

Q5: What kind of organisation are you?

a) Private limited company (for profit) b) Private limited company (not for profit / charitable status) c) State body / local authority d) Other (please specify)

Q6a: Do you have any external contractors / concessionaires on site?

a) Yes b) No

Q6b: For what functions do you have external contractors / concessionaires on site for?

- a) Retail b) Food and beverage c) Cleaning d) Facilities management e) Parking
f) Other (please specify)

Q7: How many weeks were you open to visitors in 2024?

Q8: Do you charge for admissions?

- a) Yes b) No

Section B : Financial Data

QCURRENCY: Please indicate the currency you would prefer to use to report your financial details:

- a) GBP b) Euro

Q9: What was your total revenue in 2024, net of VAT?

Q9a: What was your gross profit in 2024?

Q10: What percentage of your revenue in 2024 came from the following sources?

- a) Ticket / admission sales b) Gift shop c) Café / Restaurant d) Events & Festivals e) Private hires (corporate, weddings etc.) f) Concessions (café, retail etc.) g) Rental h) Parking fees i) Annual memberships j) Sponsorship k) Grants (e.g. Pobal, heritage council, other) l) Gifts / donations / philanthropy m) Other (please specify)

Q11: What was the average ticket sale price per visitor in 2024 (net of VAT)?

Q11b: Have you increased your ticket prices for 2025?

- a) Yes b) No

Q11c: By what average % have you increased your ticket prices by?

Q12: Do you vary your pricing in response to demand peaks and troughs (e.g. higher prices for peak hours / days / months, reduced pricing for off-peak)?

- a) Yes b) No

Q13: If you sell annual membership, what was your percentage retention rate for 2024?

Q14: What was the average retail spend per visitor in 2024 (net of VAT)?

Q15: What was the average food and beverage spend per visitor in 2024 (net of VAT)?

Q15a: What was your total operational expenditure in 2024?

Q15b: Was your operational expenditure up or down versus 2023?

a) Up by more than 20% b) Up by 10-19% c) Up by 1-9% d) Approximately the same as 2023 e) Down by 1-9% f) Down by 10-19% g) Down by more than 20%

Q16: What was the breakdown of your operational expenditure in 2024 across the following categories?

a) Staff (including contractors) b) Marketing / Sales (not including staff) c) Energy d) Insurance e) Rent f) Local authority rates g) Repairs and maintenance h) Cleaning i) Other (please specify)

Q16b: Is your business registered for VAT?

a) Yes b) No

Q17: In your most recent insurance renewal has the price changed?

a) Yes b) No

Q17a: Have your insurance increased or decreased?

a) Increased b) Decreased

Q17b: By what percentage has your insurance [increased/decreased]?

Section C : Your Visitors

Q18: How many visitors did you receive in 2024?

Q18a: And how many visitors did you receive in 2023?

Q19: Please breakdown the total number of visitors by source market for 2024?

a) Ireland b) Northern Ireland c) Britain d) Germany e) France f) Italy g) Spain h) Other European Markets i) USA j) Canada k) China l) India m) Middle East n) Australia / New Zealand o) Other (please specify)

Q20: What percentage of your admissions came from the following ticket categories in 2024?

a) Individuals (adults, children, families, concessions) b) Groups – education (schools or colleges) c) Groups – group tours d) Groups – day tours e) Groups – cruise ships f) Groups – private corporate bookings g) Memberships h) Events / festivals i) Other (please specify)

Q21: What was the seasonal distribution of your business in 2024? What share of your total number of visitors did you have each month?

Section D : Your Staff

Q22a: How many staff did you employ in 2024 in each group in management positions?

a) Full-time year round b) Part-time year round c) Seasonal d) Volunteers

Q22b: How many staff did you employ in 2024 in each group NOT in management positions?

a) Full-time year round b) Part-time year round c) Seasonal d) Volunteers

Q23: What are the principal obstacles to the employment of new staff in 2025?

a) Working hours b) Pay c) Availability of accommodation for staff d) Candidates lacking requisite skills e) Lack of candidates f) Competition from other tourism businesses g) Seasonality of employment h) Other

Q24: What are your principal needs regarding recruitment of staff in 2025?

a) Finance b) Guides c) Kitchen d) Retail e) Facilities f) Sales and marketing g) Curatorial h) General front of house staff i) Mid-management j) Senior management k) Other (please specify)

Q25: In 2024 what percentage of your staff were on National Minimum Wage?

a) Full-time year round b) Part-time year round c) Seasonal

Q26a: What was the lower end of hourly rate of pay for?

- a) Front of house / visitor services staff b) Guides c) Maintenance d) Admin assistants
e) Gardeners f) Team leaders / supervisors

Q26b: What was the upper end of hourly rate of pay for?

- a) Front of house / visitor services staff b) Guides c) Maintenance d) Admin assistants
e) Gardeners f) Team leaders / supervisors

Q27a: What was the lower end of annual salary range for?

- a) General manager / CEO b) Heads of department c) Assistant heads of department
d) Marketing executives e) Accountants f) Curators

Q27a: What was the upper end of annual salary range for?

- a) General manager / CEO b) Heads of department c) Assistant heads of department
d) Marketing executives e) Accountants f) Curators

Q28: For those staff not on national minimum wage, what was the average % salary increase applied in 2025 vs 2024?

Section E : Booking Systems

Q29: Do you have an online booking system?

- a) Yes b) No

Q30a: Does your booking system allow for online sale of tickets with specified time slots?

- a) Yes b) No

Q30b: Is your ticket sales system integrated with other sales and marketing systems?

- a) Retail POS b) Food & Beverage POS c) CRM / Database d) Other (please specify) e)
Not integrated with any other systems

Q31: What percentage of tickets did you sell online in 2024?

Q32: Do you expect this to increase or decrease in 2025?

- a) Increase b) Decrease

Q33: And why do you expect online sales to increase or decrease?

Section F : Final Observations

Q34a: Do you expect an increase or decrease in visitor numbers in 2025?

a) Increase b) Decrease

Q34b: By what percentage do you expect visitor numbers to [increase / decrease]?

Q35a: Do you expect an increase or decrease in revenue (net of VAT) in 2025?

a) Increase b) Decrease

Q35b: By what percentage do you expect your revenue to to [increase / decrease]?

Q36: What are the key internal factors influencing your outlook for 2025?

Q37: What are the key external factors influencing your outlook for 2025?

Q37a: Which of the following best describes how you are feeling about the year ahead?

a) Very positive b) Quite positive c) Neither d) Quite negative e) Very negative f) Not sure

Q37b: What key tourism trends do you think will impact your attraction in 2025? What do you anticipate their impact to be?

Q39: AVEA's core objectives are: advocacy; member networking and knowledge exchange; research; careers and education; best sustainable practices. To best support our members, what do you think our top 3 priorities for 2025/2026 should be?

Q40: Thank you for your participation in this year's survey. Are there any topics you would like to see covered in next year's survey?

QRECONTACT: We may want to contact you if any of your responses look to be outside the range of what we would expect. Your answers feed into industry reported figures so it's important we are reporting on accurate numbers. In the unlikely event we want to do this, please indicate whether you give your permission to be recontacted below:

a) I give my permission to be recontacted b) I do not give my permission to be recontacted



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