ASSOCIATION OF VISITOR EXPERIENCES & ATTRACTIONS

ANNUAL BUSINESS SURVEY 2025

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Survey of Business Performance

2025

ASSOCIATION OF VISITOR EXPERIENCES & ATTRACTIONS

-Detailed Results –

June 2026

POWERING BETTER DECISIONS

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FOREWORD

Dear members,

It is my pleasure to present the findings of AVEA's ninth annual industry survey, offering valuable insight into the performance, resilience, and evolving landscape of Ireland's visitor attractions sector.

This report reflects the contributions of our members and wider participants, whose data enables us to build a comprehensive picture of the industry's economic impact and operational realities. At a time of both opportunity and challenge, these insights are essential in guiding strategic direction, strengthening advocacy, and ensuring the continued growth and sustainability of the sector.

The 2025 AVEA survey highlights a stable and cautiously growing visitor attractions sector in Ireland, with 104 respondents reporting 19.4 million visitors, €353 million in revenue, and €79 million in profit. Employment remains significant at 4,350 staff across sites. The overall picture is of a steady, rather than stellar, year.

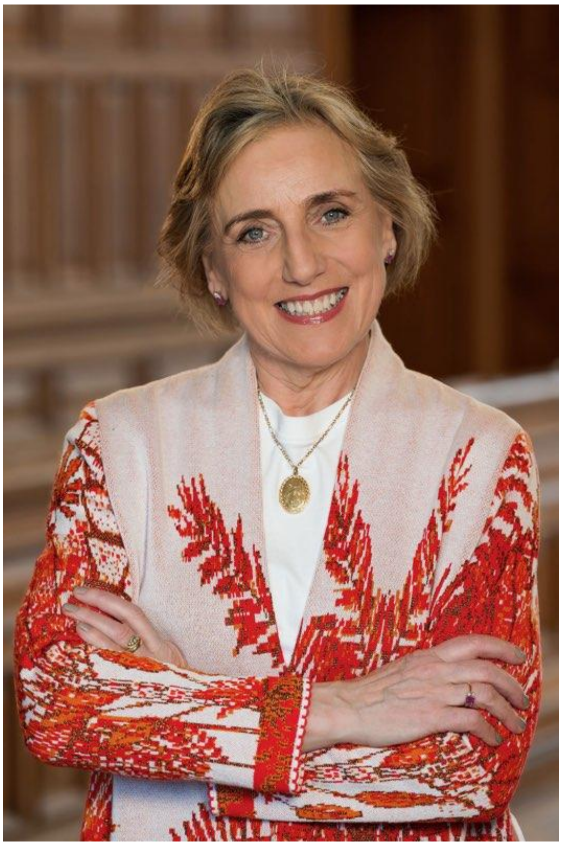
While nearly half of businesses feel generally positive about the future, only a small minority express strong optimism, reflecting ongoing cost pressures such as rising insurance premiums. Staff costs have now crept up to 54% of operating expenditure, up from 49% two years previously. Despite insurance reform, most operators experienced an increase in premiums, the mean being 12% - an identical pattern to the previous two years. However, we are seeing signs that the market is softening, and we look forward to improvements in premium pricing in the coming years.

Online ticket sales continue to expand but perhaps at a slower rate than might have been expected, as walk-ups still feature strongly. Most operators expect further growth in digital bookings, alongside modest increases in visitor numbers and revenue (around 10%) in 2026. The sector remains highly seasonal and domestically driven, with regional differences evident in staffing patterns and wage structures, particularly outside Dublin.

Taking into account non-members and non-respondents across the island of Ireland, the sector is estimated to welcome between 26 and 27 million visitors. Visitor attractions are considered a key motivator for international holiday-makers to choose the island of Ireland. Tourism Ireland identify landscape and scenery, culture and heritage, and the warm welcome of our people as its top three pull factors, and attractions deliver all three of these in a unique and unforgettable way. With an average yield per visitor of €13.54 (median: €10.00), our sector is heavily dependent on volume, we are highly vulnerable to external factors, be they geopolitical or macro/microeconomic, and we are heavily dependent on international connectivity and on-island accessibility.

Looking ahead, the outlook for 2026 is one of cautious optimism. While many operators anticipate modest growth in visitor numbers and revenue, ongoing cost pressures and structural challenges continue to temper confidence. The decision of many operators to maintain 2025 pricing levels in the face of rising costs reflects a pragmatic approach to competitiveness and delivering value.

The sector's adaptability, evidenced by the expansion of digital engagement and sustained visitor demand, positions it well for the future, but we cannot remain static in the face of fast-paced disruption of traditional search and booking tools due to the exponential growth in AI. AVEA remains committed to supporting its members, advocating for a more sustainable operating environment, and ensuring that visitor attractions continue to play a vital role in Ireland's tourism offering and broader economy.



Anne O'Donoghue.

Anne O'Donoghue, Chair of AVEA

1. Survey Introduction and Executive Summary

1.1. Introduction

AVEA has been conducting this survey among its members for a number of years, and it provides key indicators on the overall health of the sector. The findings are used to inform strategic decision-making, strengthen advocacy on behalf of members, and promote the interests of the industry more broadly. The survey also plays an important role in demonstrating the sector's contribution to Irish tourism when engaging with industry stakeholders and Government bodies. It captures essential data on the nature, scale and scope of members' operations, as well as the key factors influencing performance.

This report presents the findings from the ninth annual survey of AVEA members, focusing on business performance in 2025.

Last year, responsibility for the survey transitioned to Spark Market Research. Data collection has been conducted via an online survey, ensuring a more scalable and efficient approach to futureproof the methodology as participation grows, while also providing respondents with greater confidence in the security of the data they supply.

With Northern Ireland-based attractions also participating in the survey, respondents were given the option to complete the survey in either Euros or GBP. All GBP responses have been converted to Euros using an exchange rate of £1 = €1.15.

The survey was issued in March 2026 to visitor attractions and experiences that opted to participate. Invitations were primarily sent to AVEA members, with a small proportion issued to non-members. In total, 135 invitations were distributed, resulting in 104 responses with all questions answered (103 AVEA members and 1 non-member).

	Responded number 2026
AVEA Members	103
Non Members	1
Total	104

This year, respondents could select 'prefer not to answer' for each question. Therefore base sizes vary for each question. Where fewer than five responses were received for a particular question, results have not been reported due to the limited reliability of the data.

The visitor attractions were split across Dublin and Republic of Ireland, with a few also in Northern Ireland. In total, 33% were from Dublin, 61% were from the rest of the Republic of Ireland, and 9% were from Northern Ireland.

location	2025	2024	2023
Dublin	33%	34%	33%
ROI outside of Dublin	61%	57%	65%
Northern Ireland	9%	9%	2%

29% visitor attractions were for-profit companies, 34% were non-profit, 29% were state bodies/local authorities and 9% did not fit into any of those three categories.

We have reported results where relevant to highlight differences between Dublin, the Republic of Ireland outside Dublin, and Northern Ireland. However, due to the relatively lower number of responses from Northern Ireland, these findings should be interpreted with caution and considered indicative only.

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

- Across all attractions surveyed, there was a total of 19,353,911 visitors in 2025, an uplift from 2024.
- The total gross profit generated by respondents was €79m (based on data from 53 respondents who answered that question).
- Nearly half (48%) of the respondents surveyed are feeling ‘generally positive’ about the future. However, only 4% are feeling ‘very positive.’
- Most businesses are predicting an increase in revenue and visitor numbers for 2026, by roughly 10%.
- Attractions surveyed employ a total of 4,350 staff, an average of 49 per site.

1.2. Executive Summary

1) In 2025, attractions surveyed generated a total of €353m revenue, €79m gross profit, had 19.4m visitors and employed a total of 4,350 staff.
2) Location, attraction type, incorporated status, number of weeks open and charges for admissions data remained in line to previous years.
3) Around one-third (34%) of ticket sales currently come from online sales, and most (86%) businesses with an online booking system expect this to increase over the coming year.
4) In a similar pattern to previous years, around 4 in 10 attractions surveyed said they would be increasing their ticket prices for 2026.
5) Insurance premiums have risen again for most attractions, though fewer attractions report a change compared to last year. Overall, 11.6% reported an increase, with average increases varying by region: 5.9% in Dublin and 13.6% outside of Dublin including Northern Ireland.
6) Visitor numbers are up slightly (19.4m) in 2025 (18.7m for 2024 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 2026 for those staff not on minimum wage.
9) Businesses have a generally positive outlook for 2026, with most expecting an increase in visitors and revenue, although most are predicting marginal improvements.

2. About your attraction

2.1. Location

34 of 104 respondents are based in Dublin, 63 are based across other counties in the Republic of Ireland, and 9 are based in Northern Ireland. Location profile remains broadly consistent with previous waves in terms of distribution.

Figure 2.1. Distributions of respondents by county

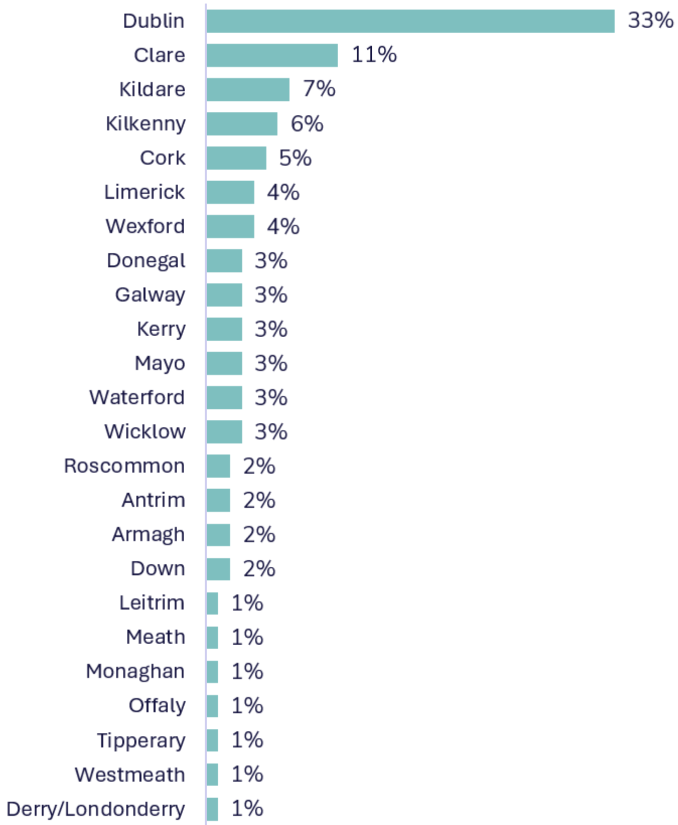
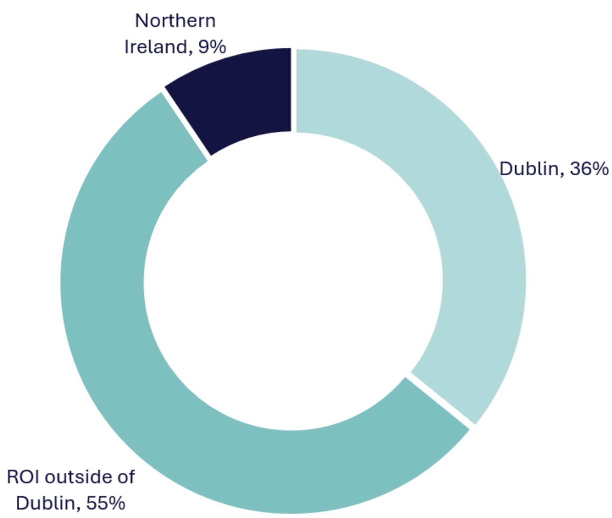


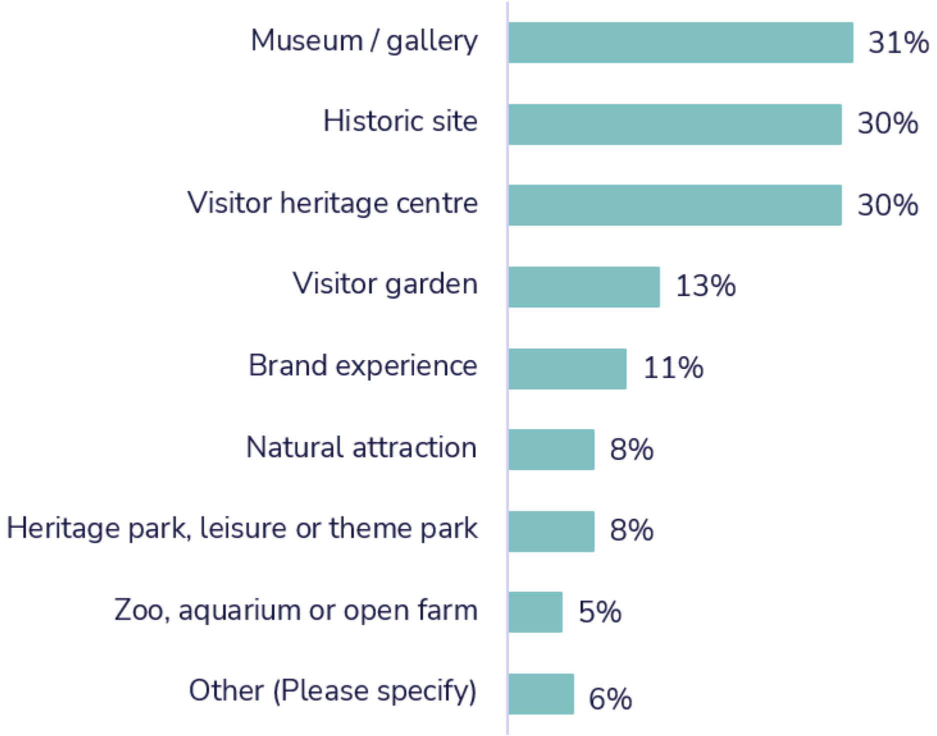
Figure 2.1a Distributions of respondents by region



2.2. Category of Attraction

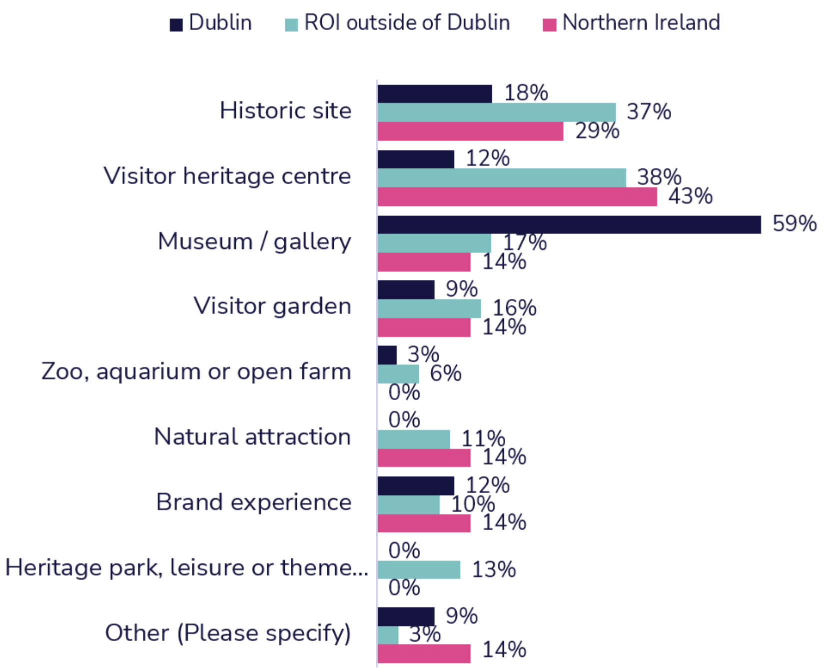
There is a higher representation of museum / galleries and historic sites than any other attraction. Several respondents fall into more than one category due to offering multiple experiences.

Figure 2.2 Category of attraction



Most of the respondents in Dublin are from a museum/gallery attraction. Attractions in the Republic of Ireland outside of Dublin are more likely to be categorised as visitor heritage centres (38%) and historic sites (37%).

Figure 2.3 Category of attraction by region



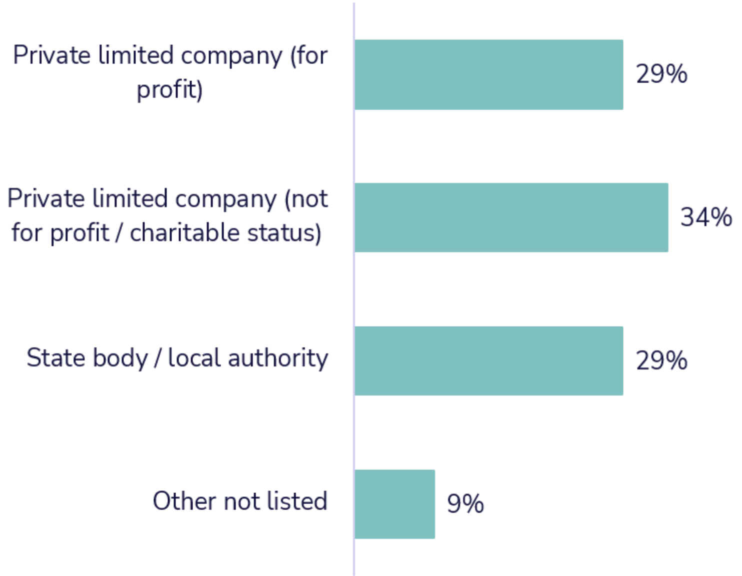
The overall composition of attraction types is broadly similar across higher- and lower-traffic sites, with only modest differences. Higher-traffic attractions are slightly more likely to be historic sites and experiential formats such as brand experiences, while smaller sites are somewhat more represented by museums/galleries and heritage centres. Differences across other categories remain minimal.

Figure 2.4. Category of attraction by number of visitors

2.3. Type of Organisation

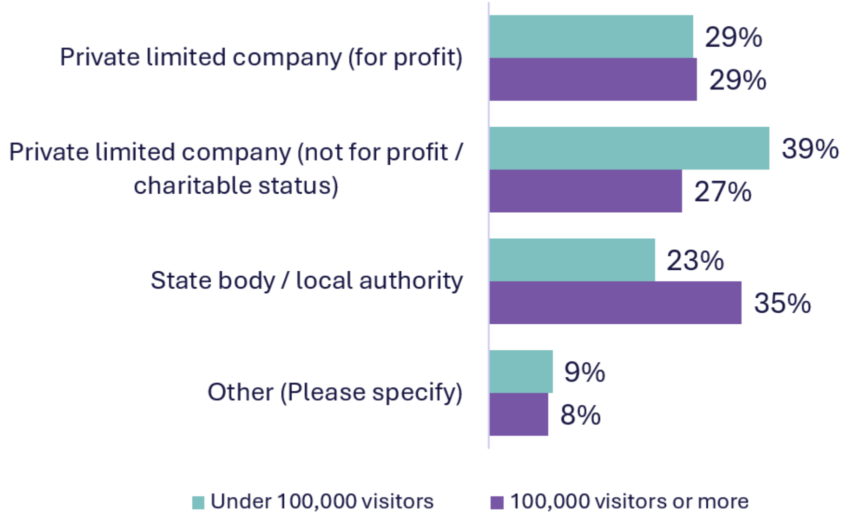
Ownership spans a mix of private and public models, with not-for-profit/charitable organisations representing the largest group (34%), ahead of both private for-profit companies and state/local authorities (29% each).

Figure 2.5 Distribution of respondents by organisation type



By visitor numbers, smaller attractions are somewhat more likely to be not-for-profit, while larger attractions are slightly more likely to be state or locally run, though differences are not pronounced.

Figure 2.6 Distribution of respondents by number of visitors



2.4. Use of External Contractors/Concessionaires

Over 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. 'Other' predominantly referred to attractions saying they use contractors for security.

Figure 2.7 Use of external contractors / concessionaires

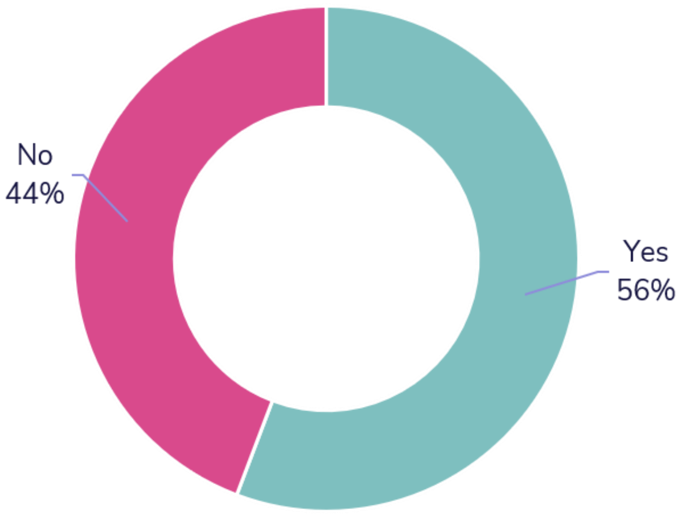
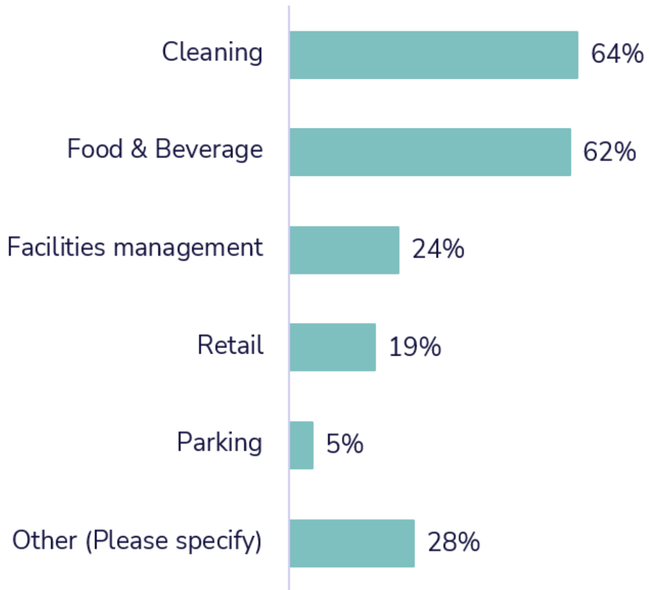


Figure 2.8: Distribution of contractor use



2.5. Weeks Open to Visitors

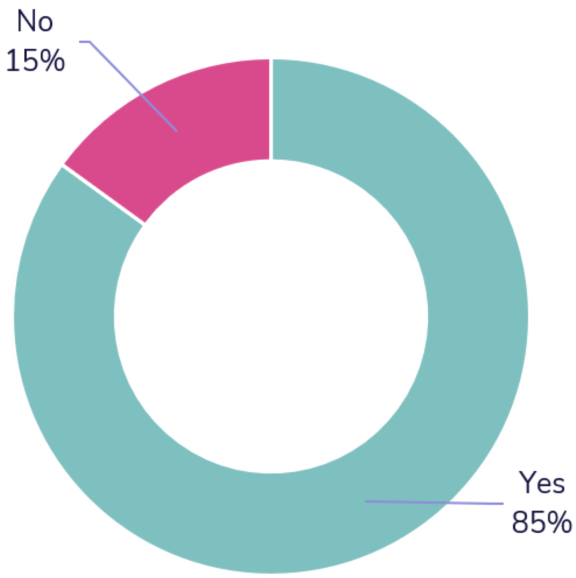
Attractions are typically open for most of the year, averaging 49 weeks, which is unchanged compared to the past two years previous. There is some variation by location and size: Dublin-based sites and larger attractions (>100k visitors) tend to operate for longer (52 and 51 weeks respectively), compared with those outside Dublin and smaller sites, which average closer to 48 weeks.

2.6. Admissions

85% of attractions we spoke to charge for admissions, with museums and galleries the least likely to do so (72%).

Most members who responded to the survey charge for admission.

Figure 2.9 Charging for admission



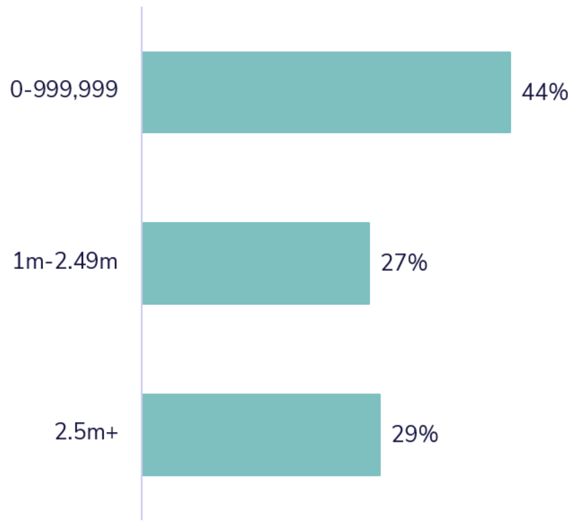
3. Financial Data

3.1. Revenue in 2025

The distribution of respondents by revenue is shown below in Figure 3.1. The total revenue generated by respondents was €353m from 77 attractions who answered this question, which has increased from 2024.

Over half of attractions are earning over 1 million (56%), with the remaining 44% sat in the 0-999,999 revenue bracket.

Figure 3.1 Distribution of respondents by revenue



3.2. Distribution of Revenue in 2025

Attractions in Dublin had a higher revenue average than attractions outside of Dublin (€5.6m compared to €4.1m). Note that Northern Ireland has been excluded from Figure 3.2 due to a small base size.

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

Revenue	Dublin	ROI outside of Dublin	Museum / gallery	Historic site	Visitor heritage centre	Visitor garden	Natural attraction	Heritage park, leisure or theme park	Brand experience	Zoo, aquarium or open farm
Average	€5.6m	€4.2m	€2.7m	€2.0m	€6.7m	€1.4m	€4.2m	€10m	€7m	€2m
Median	€2.2m	€958,690	€1.1m	€877,397	€730,000	€1.7m	€680,685	€1m	€6.9m	€2.2m
Total	€123.6m	€214.1m	€57.1m	€49.1m	€169.4m	€24.1m	€29.7m	€14.6m	€35.4m	€10.3m
Number of respondents	22	51	21	24	25	10	7	5	5	5

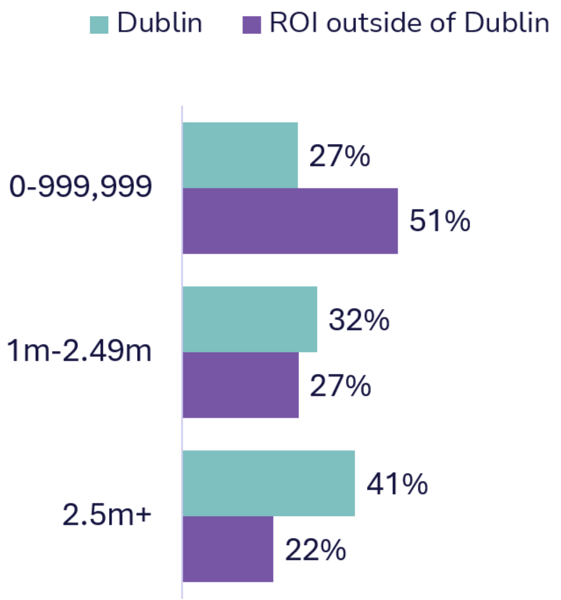


Table 1: Distribution of Respondents by Revenue – Average, Median and Total

The distribution of revenue by source is shown in Table 1.

Revenue is mixed across the attractions, with a small number of large organisations driving up averages in several categories. This means most organisations are operating at a lower level than the averages suggest, making medians a better reflection of the typical site. Dublin tends to have stronger typical performance, while areas outside Dublin contribute the most overall due to volume.

3.3. Distribution of Revenue by Source

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

Admissions dominate revenue streams (51%), with a clear drop-off beyond this point. Secondary spend is led by gift shops (15%) and cafés (10%), while all other income sources contribute only marginally, highlighting limited diversification across attractions.

Figure 3.3: Distribution of Revenue by Source

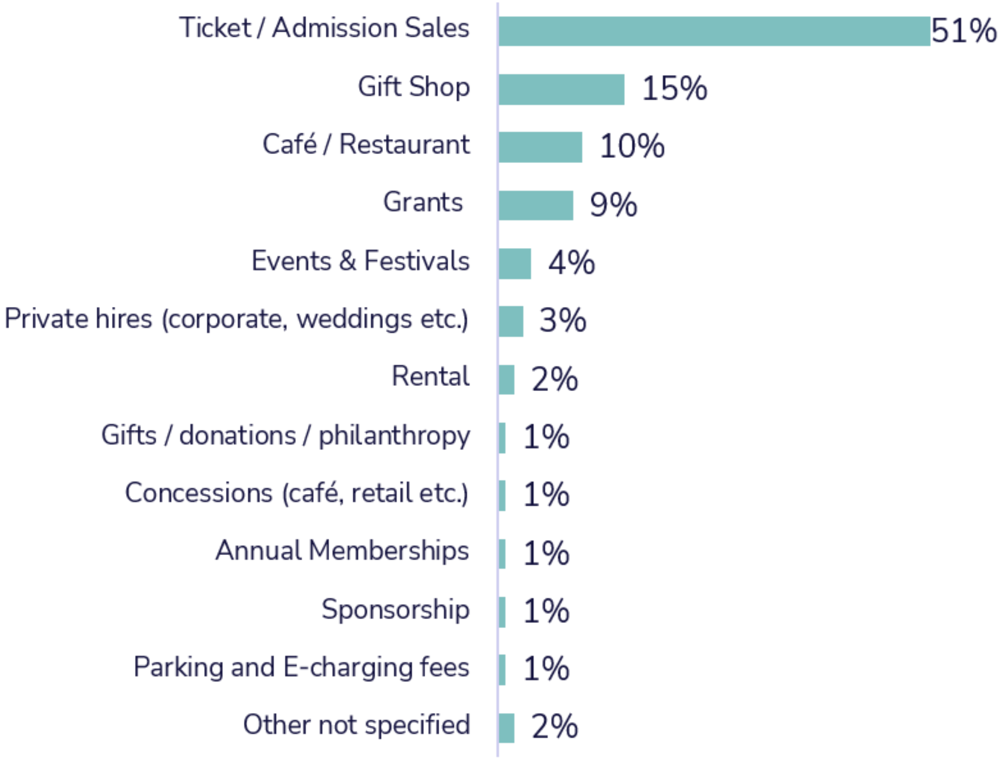


Table 2 shows that, across all regions, ticket/admission sales are the main revenue source (roughly half). After admissions, the most commonly mentioned secondary streams are gift shops and cafés/restaurants, with some regional variation (e.g., sponsorship and private hires are more prominent in Dublin, while events/festivals appear higher in Northern Ireland). Most other income sources (concessions, rental, parking/charging, memberships, grants, donations) are rarely mentioned (typically ~1–3%).

Table 2: Distribution of Revenue by Source – Dublin vs. Non-Dublin

	Dublin	ROI outside of Dublin	Northern Ireland
Ticket / Admission Sales	56%	49%	53%
Gift Shop	13%	15%	21%
Café / Restaurant	4%	12%	11%
Events & Festivals	2%	5%	9%
Private hires	6%	2%	1%
Concessions	1%	1%	0%
Rental	1%	3%	3%
Gifts / donations / philanthropy	0%	1%	1%
Parking and E-charging Fees	1%	1%	1%
Annual Memberships	1%	1%	0%
Sponsorship	13%	8%	0%
Grants	1%	1%	0%

Below, Table 3 shows admissions dominate across all attraction types (35–58%), but reliance varies. Visitor gardens are least admissions-led, while historic sites, natural attractions and zoos are most dependent. Secondary income is led by retail and F&B, with museums/galleries more reliant on grants, highlighting differing levels of diversification by attraction type.

Table 3: 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	Zoo, aquarium or open farm
Ticket / Admission Sales	51%	58%	46%	35%	58%	53%	53%	58%
Gift Shop	11%	10%	14%	11%	12%	5%	5%	13%
Café / Restaurant	5%	10%	15%	11%	12%	16%	16%	10%
Events & Festivals	3%	6%	6%	11%	2%	6%	6%	2%
Private hires	4%	4%	2%	5%	2%	4%	4%	6%
Concessions	1%	0%	1%	2%	2%	0%	0%	1%
Rental	2%	3%	6%	6%	1%	3%	3%	2%
Parking and E-charging Fees	1%	0%	1%	3%	1%	0%	0%	0%
Annual Memberships	1%	1%	1%	3%	1%	2%	2%	2%
Sponsorship	3%	0%	0%	0%	0%	0%	0%	1%
Grants	14%	6%	6%	7%	10%	8%	8%	3%
Gifts / donations / philanthropy	3%	1%	1%	3%	0%	0%	0%	0%

3.4 Gross Profit

In 2025, the total gross profit generated by respondents was €79m from 53 attractions who answered the question. Most attractions remain profitable, with a notable share generating €1m+ gross profit. A small percentage reported a loss in 2025 (17%).

The distribution of respondents by gross profit is shown below in figure 3.5, with the distribution split by Dublin and ROI outside of Dublin in figure 3.6. Most attractions saw a gross profit of between 0-999,999, with this more likely to be higher for attractions in Dublin. Note, there were insufficient responses from Northern Ireland attractions to report.

Figure 3.4 Distribution of respondents by gross profit

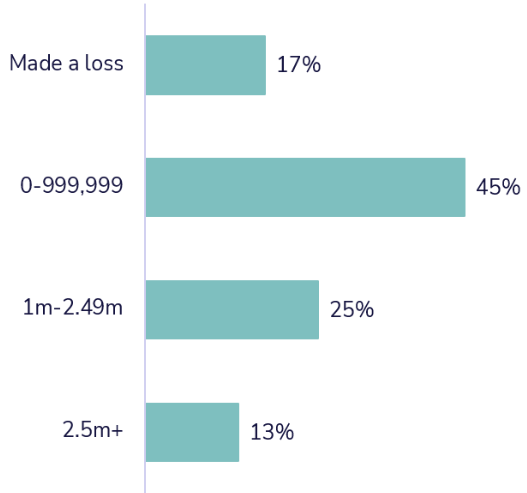


Figure 3.5 Distribution of Respondents by Gross Profit – Dublin vs. Non-Dublin

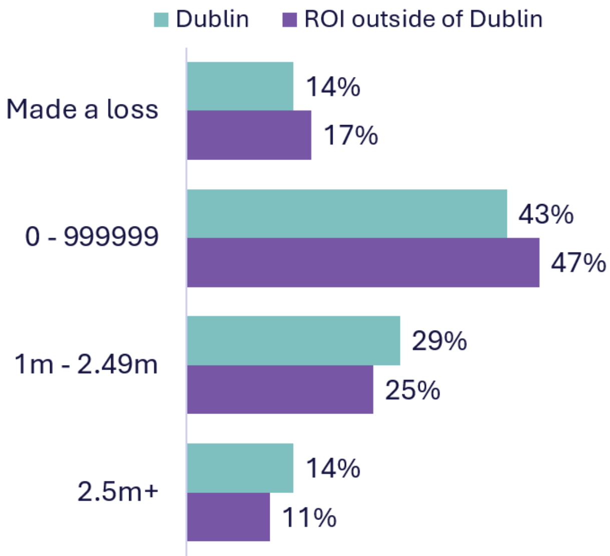


Table 4a: Distribution of Respondents by Gross Profit - Average, Median and Total - Dublin vs. Non-Dublin

Gross Profit	Dublin	ROI outside of Dublin
Average	€1.9m	€1.2m
Median	€499,500	€159,323
Total	€26.3m	€45.1m
Number of respondents	14	39

Table 4b: Distribution of Respondents by Gross Profit - Average, Median and Total - by Category of Attraction

Gross Profit	Museum / gallery	Historic site	Visitor heritage centre	Visitor garden	Natural attraction	Heritage park, leisure or theme park
Average	€947,729	€2.2m	€1.1m	€947,729	€3.1m	€1.3m
Median	€105,000	€133,460	€6.9m	€-56,400	€999,164	€173,645
Total	€16.1m	€15.8m	€36.6m	€14.1	€18.5m	€6.8m
Number of respondents	17	15	32	5	6	5

Table 4a and 4b show the gross profit totals, averages and medians by location and category type. Northern Ireland, brand experience attractions and zoo, aquarium or open farm attractions have been excluded from the results due to insufficient responses (<5).

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 5, 6 and 7 below. The median values are also included in table 5.

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 across ticket price, retail and food and beverage spend.

Table 5: Average ticket, retail, and food & beverage sales per visitor, net of VAT

	Ticket Price	Retail Spend	F&B Spend
Average	€13.54	€6.46	€7.40
Median	€10.00	€4.00	€6.00

As shown in table 6, the average ticket prices were higher in Dublin (€16.05 average), whilst retail spend was notably higher outside of Dublin (€9.26 average for ROI vs €3.56 Dublin). F&B spend was higher outside of Dublin (€8.00 average for ROI vs €6.20 for Dublin). Please note that these figures are based on total responses for each region and the category of attraction that answered may vary.

Table 6: Average ticket price, retail and food & beverage spend by region

		2025	Dublin	ROI Outside Dublin	Northern Ireland
Ticket Price	Average	€13.54	€16.05	€12.72	€11.20
	Median	€10.00	€12.00	€10.00	€10.20
Retail Spend	Average	€6.46	€3.56	€9.26	€6.57
	Median	€4.00	€3.00	€5.00	€5.02
F&B Spend	Average	€7.40	€6.20	€8.00	€5.50
	Median	€6.00	€6.00	€6.00	€4.00

Table 7 shows that smaller attractions tend to charge a bit more for entry, while larger attractions make more of their money back through on-site retail spending. Food & drink spend is broadly similar regardless of visitor volume, suggesting retail is the clearer lever that differentiates higher-footfall sites.

Table 7: Average ticket price, retail and food & beverage spend by number of visitors

		Under 100,000 visitors	100,000 visitors or more
Ticket Price	Average	€14.62	€11.96
	Median	€10.50	€10.00
Retail Spend	Average	€7.24	€10.95
	Median	€4.00	€4.89
F&B Spend	Average	€7.60	€7.20
	Median	€6.00	€5.00

3.6. Ticket Price Increases

Over half of attractions who charge for admission did not increase their ticket prices for 2025. Of those that did increase, the majority increased by 1-5%, consistent with the trend from 2024. Overall, 45% of attractions that charge for admission increased their prices, compared to 39% in the previous year.

Figure 3.6: Ticket price increases for 2025

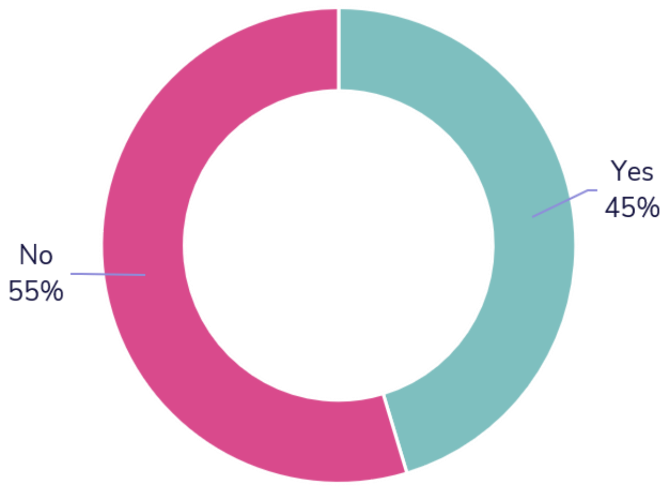
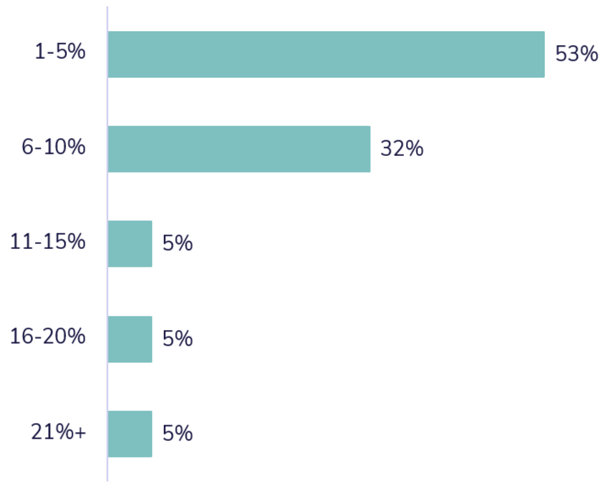


Figure 3.7: Average % of ticket price increases (amongst those who applied an increase)



43% of the respondents with attractions in Northern Ireland increased their prices for 2025. 27% of attractions in Dublin raised their ticket prices compared to 47% of the rest of the Republic of Ireland. Attractions with under 100,000 visitors were more likely to apply increases (48%) versus those with 100,000 visitors or more (30%).

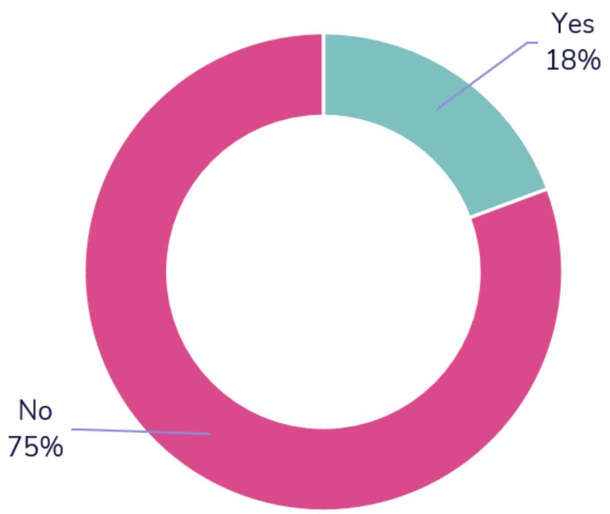
Table 8: % of businesses who vary their pricing due to demand peaks and troughs

Vary pricing to demand peaks and troughs	Dublin	ROI outside of Dublin	Under 100,000 visitors	100,000 visitors or more
% Yes	27%	13%	16%	20%

3.7. Variable Ticket Pricing

The vast majority of attractions didn't vary their pricing in response to demand peaks and troughs, with only 18% opting to vary their pricing. Attractions in Dublin were more likely to have variable pricing – 27% compared to 13% in the rest of the Republic of Ireland and 16% in Northern Ireland. 20% of attractions with more than 100,000 visitors reported variable pricing, compared to 16% of attractions with fewer than 100,000 visitors.

Figure 3.8 Variable Pricing



3.8. Annual Membership Retention Rate

Around 1 in 5 respondents (22%) stated they sold annual membership in 2025. Fewer attractions in Dublin offered annual membership (6%) compared to the rest of the Republic of Ireland (30%) and Northern Ireland (20%).

Figure 3.9: Percentage of sites offering Membership – Median values

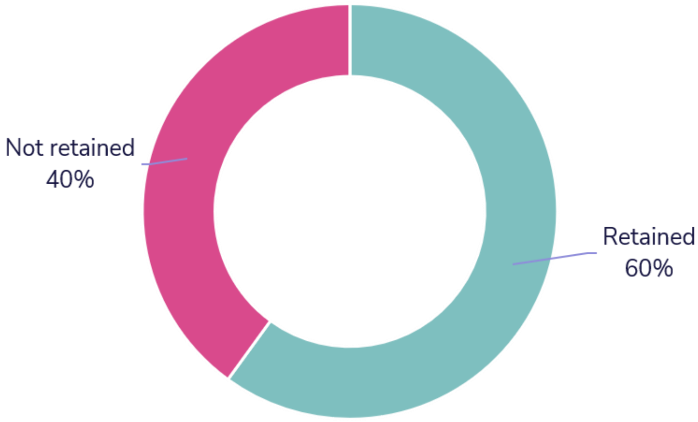


Table 9: Annual membership offerings by region and visitor number

Offer annual membership	2025	Dublin	ROI outside of Dublin	Northern Ireland	Under 100,000 visitors	100,000 or more visitors
Yes (2025)	22%	7%	30%	20%	15%	34%
Number of respondents	89	28	56	5	54	35

Table 10 shows that of those who offered annual membership, retention levels varied. Of the 20 attractions who responded to this question, 40% had a retention rate of 81-100% and 40% had a rate of 61-80%, indicating strong retention among those offering membership. Retention rates appear to have fallen year-on-year (2024 median: 79%).

Table 10: Annual Membership Retention Rate

Retention rates	2025
0-20%	15%
21%-40%	5%
41%-60%	0%
61%-80%	40%
81%-100%	40%
Number of respondents	20

3.9. Breakdown of Operational Expenditure

Around half of attractions have an operational expenditure of under €1 million. On average, Dublin attractions reported the highest operational expenditure (average €4,506,545; median €1,636,956), followed by Northern Ireland (average €3,158,660; median €2,368,121) and ROI outside Dublin (average €1,860,619; median €938,000). The overall average was €2,696,834 (median €1,061,164) across 60 respondents.

Figure 3.10: Distribution of operational expenditure

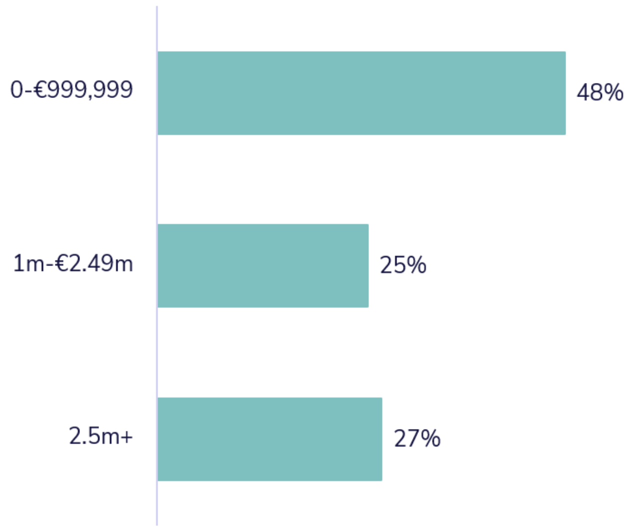


Table 11: Average and median operational expenditure by region

	2025	Dublin	ROI outside of Dublin	Northern Ireland
Average	€2,696,834	€4,506,545	€1,960,619	€3,158,660
Median	€1,061,164	€1,636,956	€938,000	€2,368,121
Number of respondents	60	17	39	4

As seen in figure 3.11 operational expenditure has increased for most attractions versus 2024, although by slightly less than the previous year. Among attractions reporting an increase, Dublin saw 30% with OpEx up by 10% or more, ROI outside Dublin 40%, and Northern Ireland 29%.

Figure 3.11: Reported operational expenditure change versus 2024

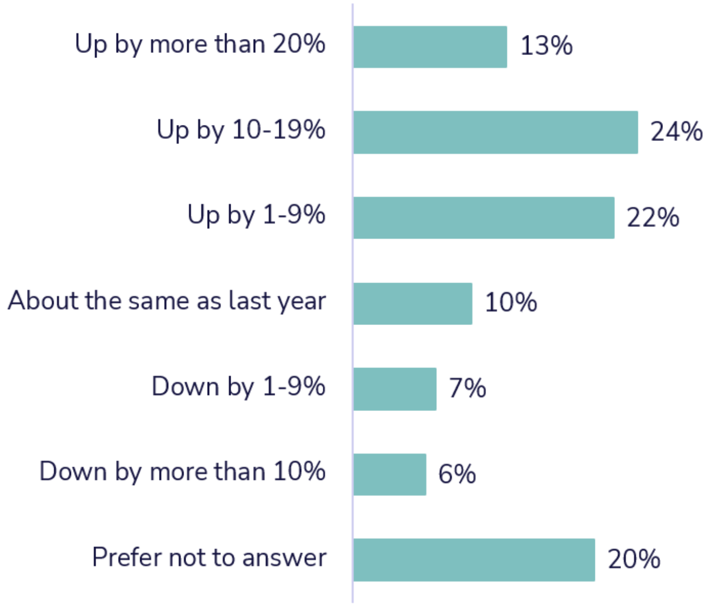


Table 12: Attractions with operational expenditure up by 10% or more by region

Attractions with OpEx up by 10% or more	%
Dublin	30%
ROI outside of Dublin	40%
Northern Ireland	29%

Figure 3.12: Breakdown of Operational Expenditure

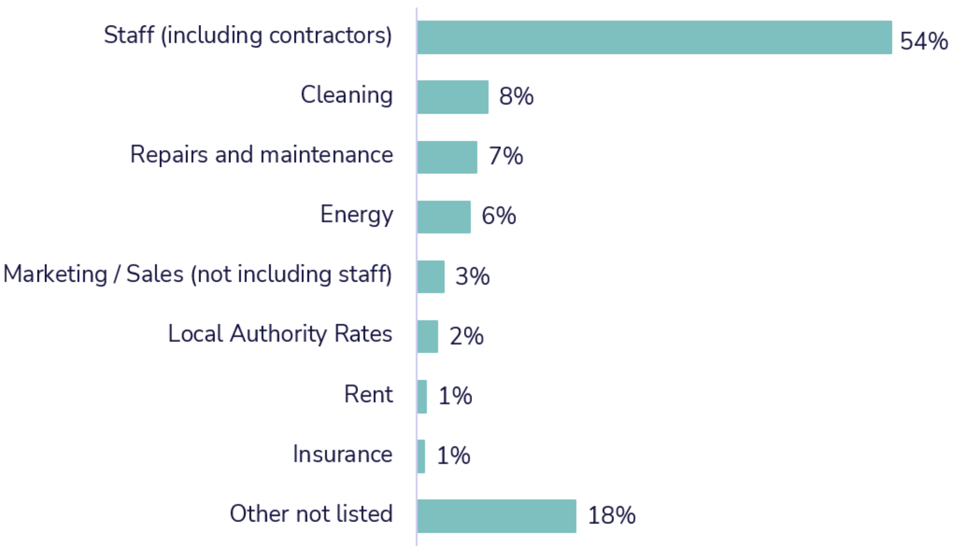


Figure 3.13 shows that over half of operational expenditure was staff costs, with the remaining categories significantly less by comparison. ‘Other’ predominantly included professional fees (accountancy, banking, legal, etc.), IT and travel costs.

Figure 3.13 Breakdown of Operational Expenditure by region

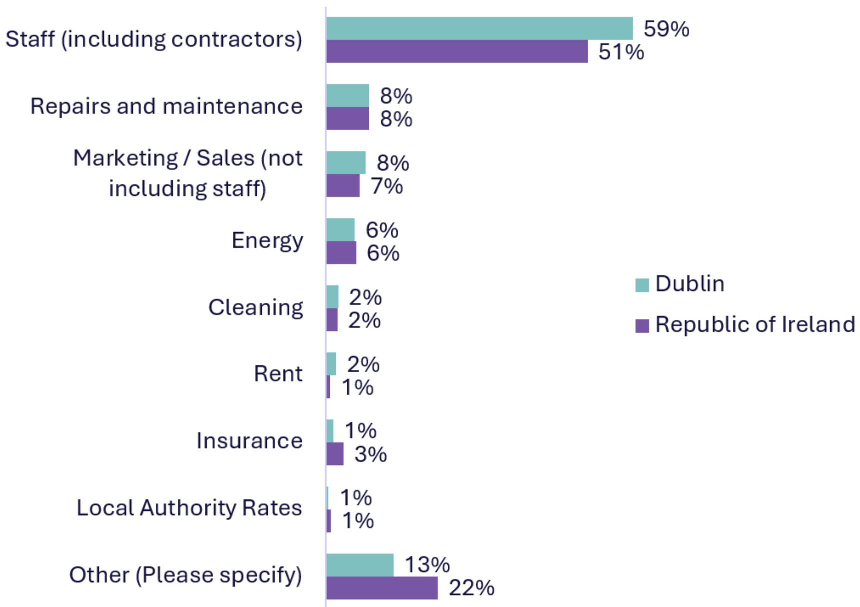
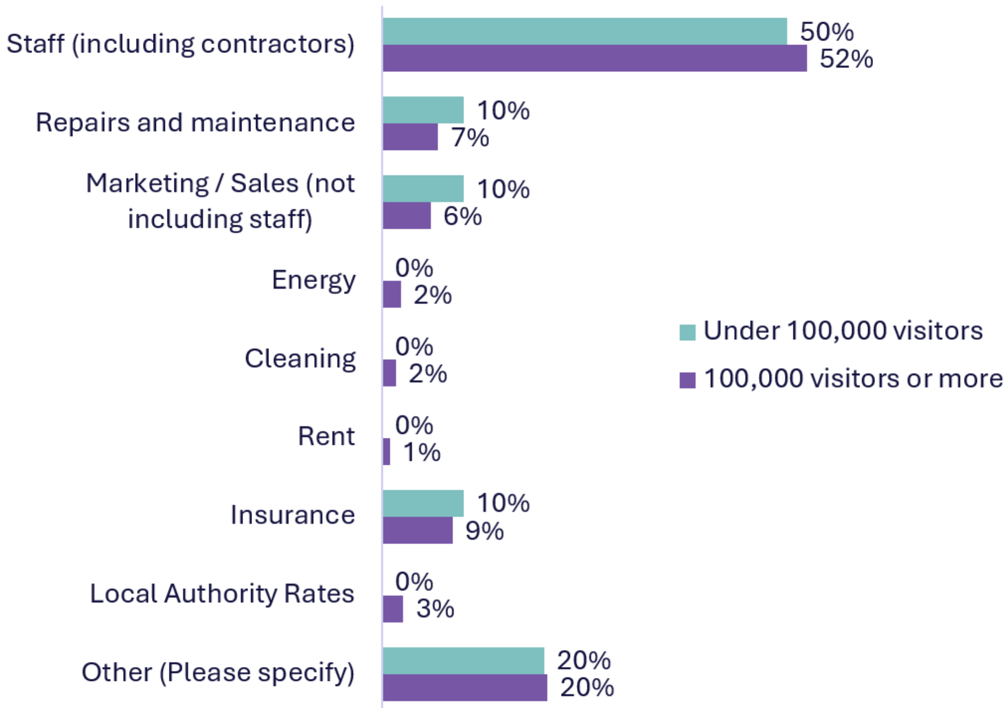


Figure 3.14 Breakdown of Operational Expenditure by number of visitors



3.10. VAT Registration

Most respondents are VAT registered (89%). VAT registration was higher amongst those charging for admissions (90%) than those not charging for admissions (79%).

Figure 3.15: VAT Registered

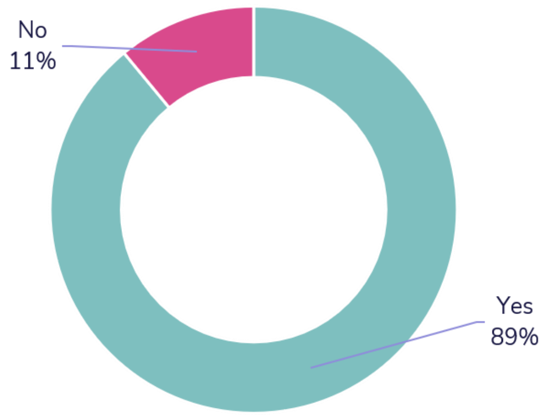


Table 13: VAT registration by admission charge status

VAT Registered	Charging for admissions	Not charging for admissions
Yes	88%	94%
No	12%	6%

3.11. Insurance Renewal

Fewer respondents reported a change in their insurance premium compared to last year (48% overall vs 74% in 2024). However, 35% preferred not to answer this question this year. Of those that did see a change, the majority reported an increase (Dublin 92%, ROI outside Dublin 87%, Northern Ireland 80%).

Figure 3.16: Insurance premium changes

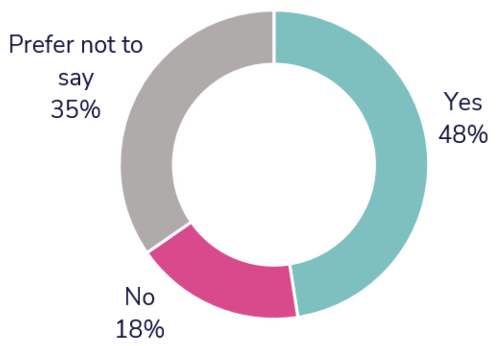
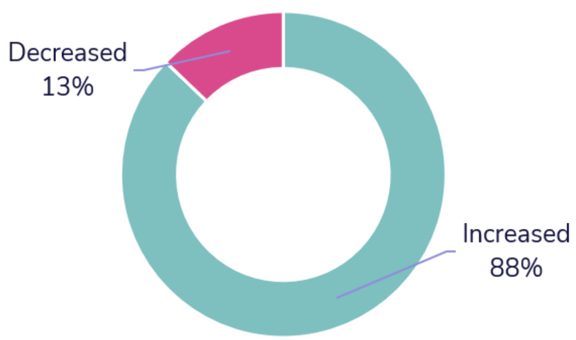
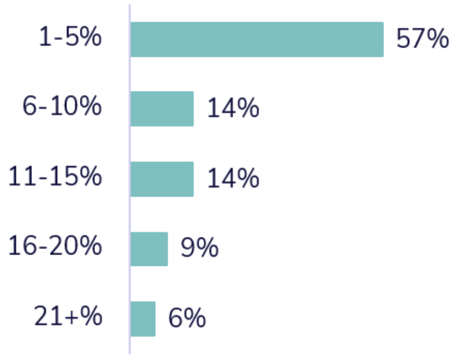


Figure 3.17 Insurance premium changes (amongst those who reported a change)



Of those respondents who reported an increase, the median increase was 5% both overall and in Dublin and outside of Dublin. The average increase was higher outside of Dublin at 13.6%, compared to 5.9% in Dublin.

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



4. Visitors

4.1. Number of Visitors Received in 2025

The number of visitors in 2025 was a total of 19,353,911. Of those who responded to the question, Dublin reported 10,073,193 visitors, the rest of the Republic of Ireland reported 8,327,598 visitors and Northern Ireland reported 953,120 visitors. This represents an increase of +3.3% overall versus 2024, with Dublin up +5.5%, ROI outside Dublin up +6.5% and Northern Ireland up +7.1%.

Table 14: Distribution of visitor numbers

Visitors	No. of Sites
Up to 49,999	32
50,000-109,999	25
110,000-249,999	20
250,000-499,999	12
500,000+	10

Compared to last year, we can see an increase in visitor numbers from 2024 to 2025 as shown in figure 4.1.

Figure 4.1: Total visitor numbers for 2024 and 2025 for attractions surveyed

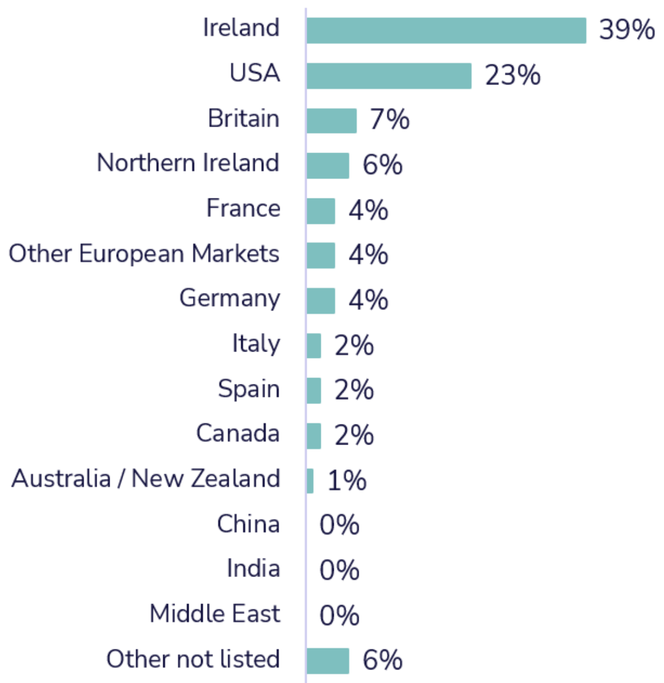
Table 15: Total visitor numbers, difference and proportional increase – by region

	2024/2025	Dublin	ROI outside of Dublin	Northern Ireland
2024	18,739,908	9,544,053	7,821,432	889,593
2025	19,353,911	10,073,193	8,327,598	953,120
Difference	+614,003	+529,140	+506,166	+63,527
Proportional increase between 2024 and 2025	+3.3%	+5.5%	+6.5%	+7.1%
Number of respondents	2024: 92 2025: 99	2024: 32 2025: 32	2024: 48 2025: 60	2024: 7 2025: 7

4.2. Origin of Visitors

Most visitors in 2025 came from ROI (39%). After the domestic market, the U.S. (23%) and Britain (7%) are top tourist sources across the attractions, which matches figures from last year.

Figure 4.2: Origin of visitors by source market



Responses are largely localised: Ireland dominates in both Dublin and ROI outside Dublin, while Northern Ireland respondents mainly come from their own market. Dublin is the most internationally mixed (notably higher USA and European visitors), whereas

ROI outside Dublin is more domestically focused. Northern Ireland shows stronger links to Britain.

Table 16: Origin of visitors by source market – by region

	Dublin	ROI outside of Dublin	Northern Ireland
Ireland	30%	48%	16%
USA	21%	26%	13%
Britain	9%	6%	11%
Northern Ireland	3%	2%	43%
France	7%	3%	2%
Other European markets	5%	3%	2%
Germany	4%	4%	2%
Italy	2%	2%	1%
Spain	3%	1%	1%
Canada	3%	1%	1%
Australia / New Zealand	1%	1%	2%
China	0%	0%	1%
India	0%	0%	0%
Middle East	0%	0%	0%
Other not listed	11%	3%	3%
Number of respondents	28	51	7

4.3. Visitor Ticket Categories

Figure 4.3 shows a heavily individual-led audience, with 67% of all visitors being individuals. The next biggest sources are group tours (10%) and education groups (8%), while events/festivals (5%) and memberships (3%) contribute relatively little. Overall, this suggests performance is driven more by general public footfall than organised groups or member visitation.

Figure 4.3: Distribution of admissions by ticket category

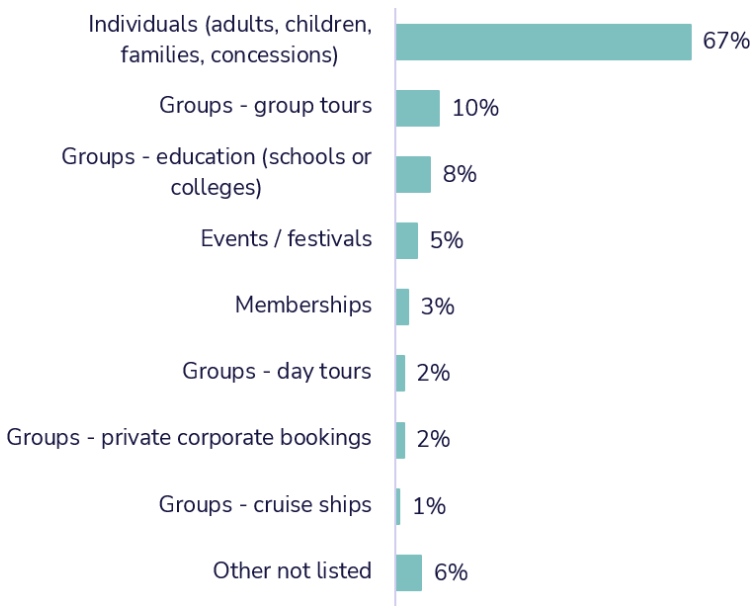
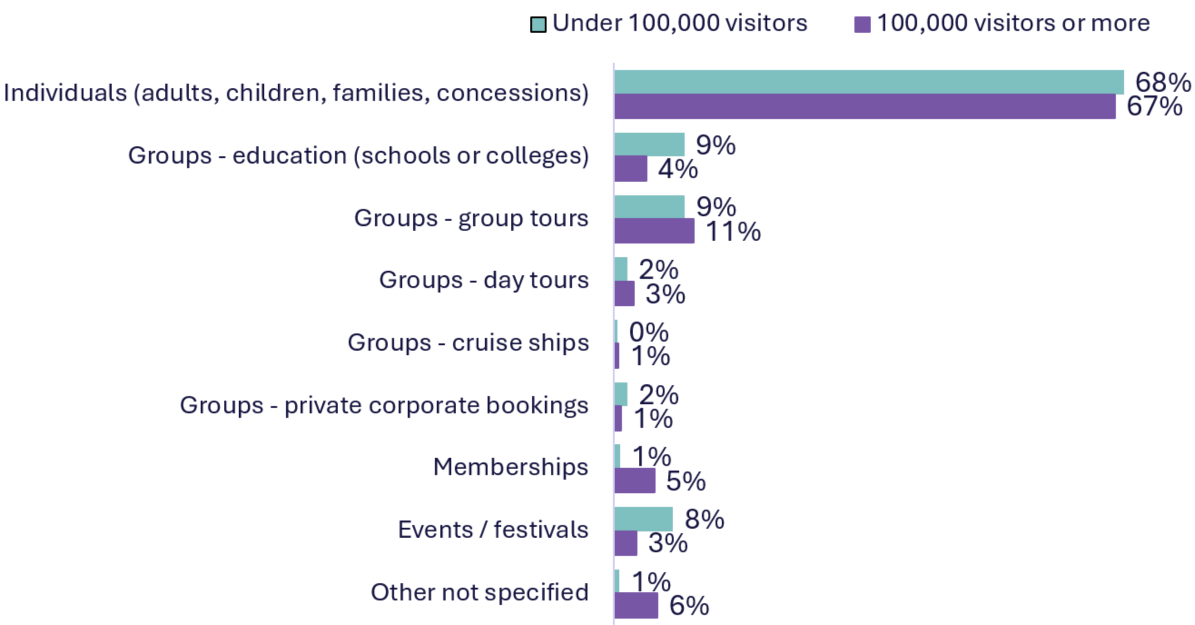


Figure 4.4: Distribution of Admissions by Ticket Category (100,000 or fewer vs. more)



4.4. Seasonality

The number of tourists remains heavily skewed towards May-September across all areas. In 2025, ROI attractions outside of Dublin saw 67% of visitors during May-September, Dublin 53%, and Northern Ireland 58%.

Figure 4.5 Seasonal distribution of admissions

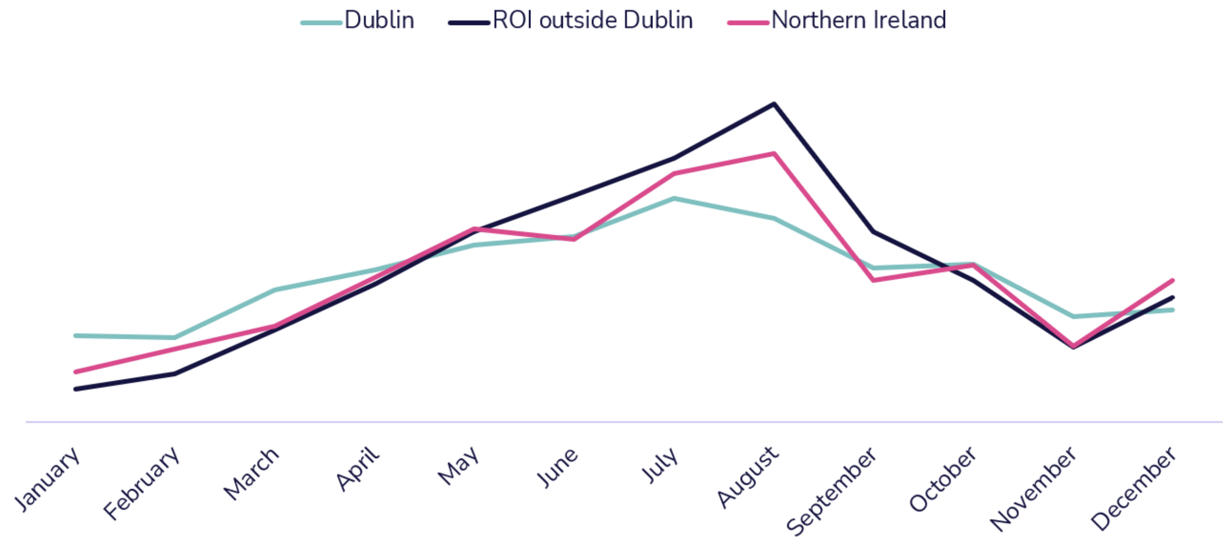


Table 17: Proportion of admissions between May-September by region

	Dublin	ROI outside of Dublin	Northern Ireland
May-September	53%	67%	58%

5. Your Staff

5.1. Number of Staff Employed

A total of 86 respondents answered this question and employed a total of 4,350 staff - an average of 49 per site. Staff were most likely to be full-time (40%), followed by part-time (26%) or seasonal (25%). Volunteers (10%) represent a lesser proportion. Management staff were predominantly full-time (87%), compared with roughly 4 in 10 other staff members (42%). Over half of other staff are employed as part-time or seasonal (56%).

Figure 5.1: Employee contract split across all employees

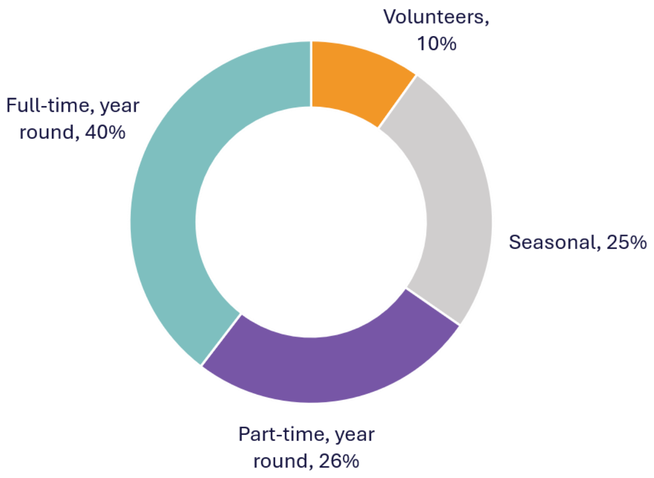
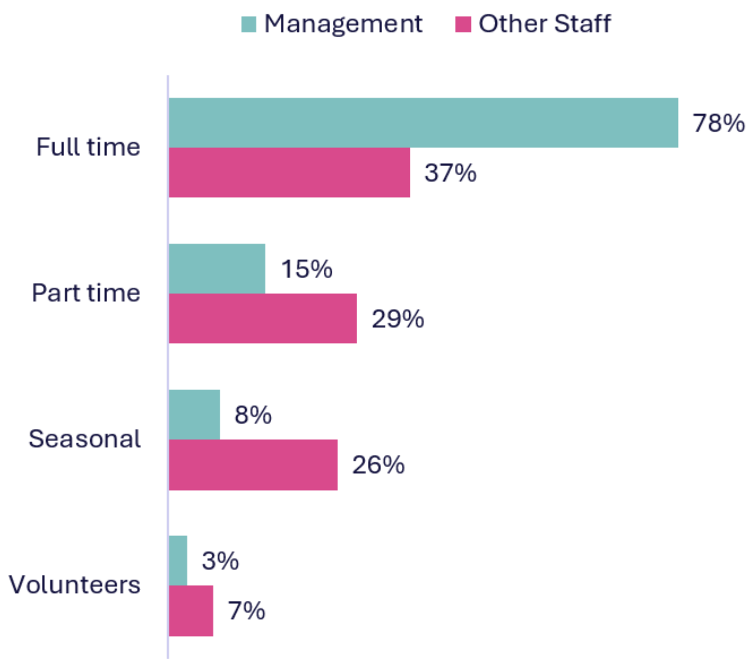


Figure 5.2: Employee contract split between management and other staff



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 lower numbers indicate more of an issue, whilst higher numbers indicate less of an issue. Obstacles to employment have eased since last year. Pay and lack of candidates remain key barriers across all regions. Accommodation for staff is rated as the least impactful barrier overall, though it scores higher for Northern Ireland. Working hours and accommodation for staff are the two lowest-ranked concerns in Dublin.

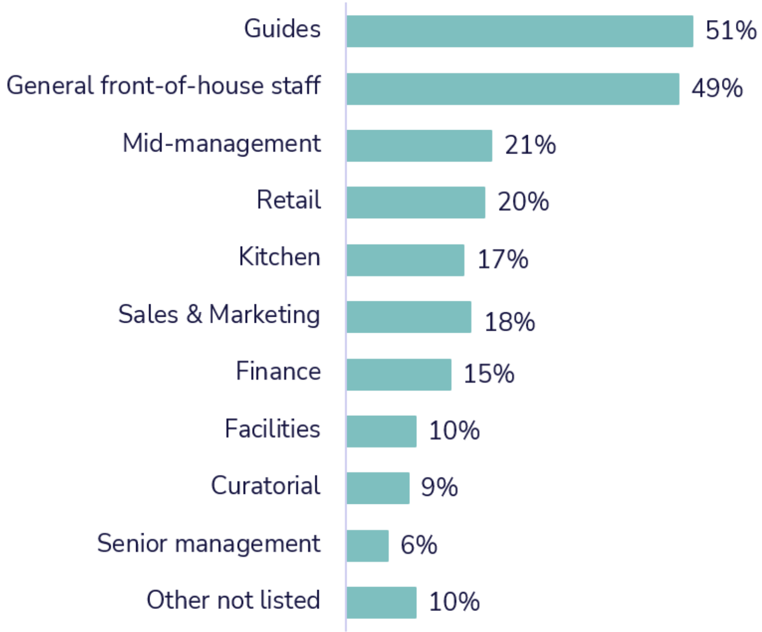
Table 18: Obstacles to recruitment – by region

Ranking	2025	Dublin	ROI outside Dublin	Northern Ireland
Seasonality of employment	3.2	3.8	2.7	4.8
Pay	3.3	3.4	3.2	3.5
Lack of candidates	3.3	3.3	3.4	2.2
Candidates lacking requisite skills	3.4	3.4	3.6	2.3
Working hours	4.6	4.6	4.8	4.0
Competition from other tourism business	4.8	4.3	5.0	4.2
Accommodation for staff	5.4	5.2	5.3	7.0

5.3. Principal Needs regarding recruitment of staff in 2025

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 2025



Guides (51%) and general front-of-house staff (49%) remain the top recruitment needs in 2025. Dublin attractions are more likely to need guides (44%) and retail staff (31%), and notably more likely to need finance staff (28%) compared to ROI (7%). Northern Ireland attractions are more likely to need facilities staff (43%) and general front-of-house (57%). Mid-management needs are consistent across regions at around 19-29%.

Table 19: Principal needs regarding recruitment of staff – by region

Ranking	2025	Dublin	ROI outside Dublin	Northern Ireland
Guides	51%	44%	56%	43%
General front-of-house staff	49%	53%	46%	57%
Mid-management	21%	19%	22%	29%
Retail	20%	31%	17%	0%
Kitchen	17%	6%	24%	14%
Sales & Marketing	18%	19%	20%	0%
Finance	15%	28%	7%	29%
Facilities	10%	6%	8%	43%
Curatorial	9%	16%	7%	0%
Senior management	6%	9%	5%	0%
Number of respondents	98	32	59	7

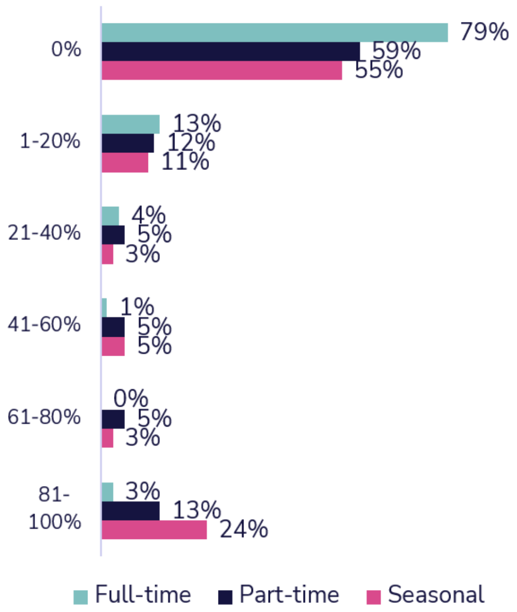
6. Staff Remuneration

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

6.1. National Minimum Wage

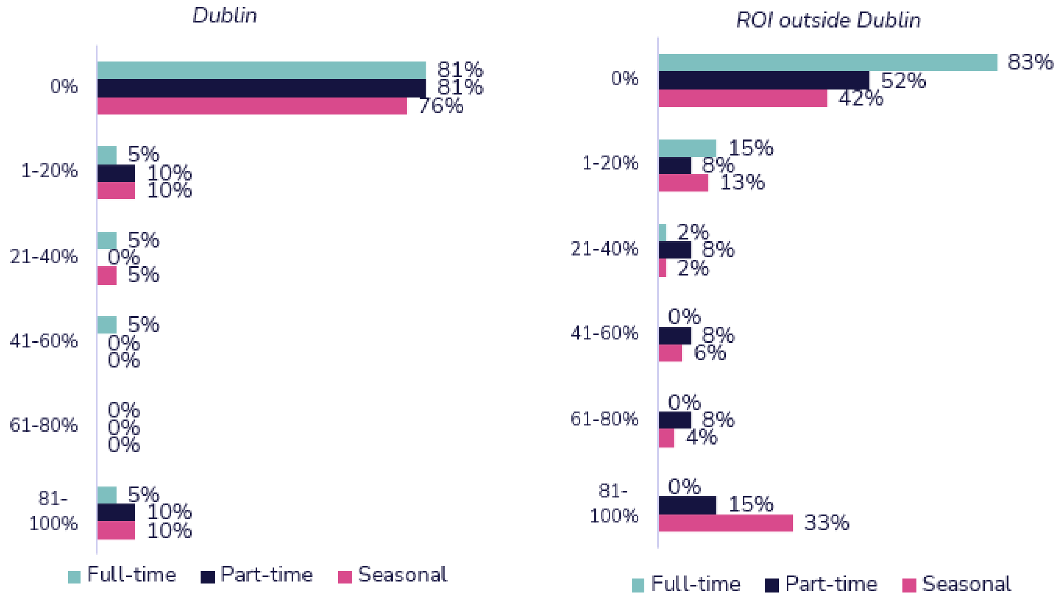
Figure 6.1 shows the percentages of the respondents' staff on minimum wage. The majority of staff across attractions were paid above the national minimum wage in 2025.

Figure 6.1: Distribution of staff on minimum wage



Most staff of attractions in Dublin and Republic of Ireland are paid more than the 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 20. In 2025, average hourly rates ranged from €13.97 (low end, front of house) to €18.72 (high end, team leaders/supervisors). Dublin continues to pay slightly more on average across most roles. The median values are shown alongside averages as they better represent typical pay given the spread of responses.

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 20: Average hourly rate of pay by category

	Range of Hourly Rate of Pay	Low End	High End
AVERAGE	Front of house / visitor services staff	€13.97	€15.66
	Guides	€14.47	€16.83
	Maintenance	€15.43	€18.07
	Admin. Assistants	€15.64	€16.90
	Gardeners	€15.82	€17.51
	Team leaders / supervisors	€17.24	€18.72
MEDIAN VALUE	Front of house / visitor services staff	€14.15	€15.00
	Guides	€14.39	€15.50
	Maintenance	€15.00	€16.79
	Admin. Assistants	€15.00	€16.50
	Gardeners	€15.00	€17.25
	Team leaders / supervisors	€16.10	€17.69

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

Table 21: Average hourly rate of pay – by region

Low End

		Dublin	ROI outside Dublin
AVERAGE	Front of house / visitor services staff	€14.64	€13.64
	Guides	€14.85	€14.08
	Maintenance	€15.94	€15.38
	Admin. Assistants	€16.30	€15.30
	Gardeners	€14.25	€16.13
	Team leaders / supervisors	€17.88	€16.67
MEDIAN VALUE	Front of house / visitor services staff	€14.85	€14.00
	Guides	€14.80	€14.00
	Maintenance	€15.98	€14.35
	Admin. Assistants	€16.20	€14.50
	Gardeners	€14.25	€15.80
	Team leaders / supervisors	€17.00	€16.00

High End

		Dublin	ROI outside Dublin
AVERAGE	Front of house / visitor services staff	€15.96	€15.59
	Guides	€17.53	€16.60
	Maintenance	€22.08	€17.66
	Admin. Assistants	€17.81	€16.60
	Gardeners	€15.25	€17.72
	Team leaders / supervisors	€19.04	€18.48
MEDIAN VALUE	Front of house / visitor services staff	€15.00	€15.00
	Guides	€15.38	€15.28
	Maintenance	€22.05	€16.25
	Admin. Assistants	€18.00	€16.25
	Gardeners	€15.25	€17.49
	Team leaders / supervisors	€17.67	€17.09

6.3. Range of Annual Salary

Similarly to hourly rates of pay, salaried employees in Dublin continue to earn more than those in attractions outside of Dublin. In 2025, the average General Manager/CEO salary was €72,045 (median €65,000) overall, rising to €90,361 average in Dublin. Heads of department averaged €72,045 overall. Marketing executives averaged €39,924 and accountants €61,069. All salary bands remain higher in Dublin compared to ROI outside Dublin.

Table 22: Average range of annual salary by category

		Low End	High End
AVERAGE	General manager / CEO	€60,904	€72,045
	Heads of department	€39,228	€52,938
	Assistant heads of department	€32,547	€56,454
	Marketing executives	€32,919	€39,924
	Accountants	€47,136	€61,069
	Curators	€37,261	€44,511
MEDIAN VALUE	General manager / CEO	€58,000	€65,000
	Heads of department	€37,220	€65,000
	Assistant heads of department	€32,000	€50,000
	Marketing executives	€35,000	€43,500
	Accountants	€40,000	€60,000
	Curators	€38,500	€47,500

Table 23: Average range of annual salary by category – by region

Low End

		Dublin	ROI outside Dublin
AVERAGE	General manager / CEO	€75,004	€55,441
	Heads of department	€52,625	€33,941
	Assistant heads of department	€42,750	€26,717
	Marketing executives	€33,750	€32,664
	Accountants	€53,433	€46,714
	Curators	€43,867	€31,169
MEDIAN VALUE	General manager / CEO	€75,000	€52,500
	Heads of department	€53,000	€35,750
	Assistant heads of department	€40,000	€30,000
	Marketing executives	€32,500	€35,000
	Accountants	€50,000	€40,000
	Curators	€40,000	€37,000

High End

		Dublin	ROI outside Dublin
AVERAGE	General manager / CEO	€90,361	€65,510
	Heads of department	€73,012	€43,687
	Assistant heads of department	€68,500	€49,571
	Marketing executives	€45,750	€37,104
	Accountants	€73,000	€56,595
	Curators	€54,033	€37,169
MEDIAN VALUE	General manager / CEO	€75,000	€62,500
	Heads of department	€75,000	€62,500
	Assistant heads of department	€69,500	€50,000
	Marketing executives	€42,500	€45,000
	Accountants	€70,000	€55,000
	Curators	€54,600	€41,500

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

For most staff not on national minimum wage, almost three quarters (73%) received a 1-5% salary increase in 2025. 16% received no increase, 10% received 6-10%, and 2% received 11% or more. Dublin attractions were more likely to give no increase (31%) than ROI outside Dublin (11%), whilst ROI was more likely to apply a 1-5% rise (75% vs 63% in Dublin).

Figure 6.3: percentage of average salary increase

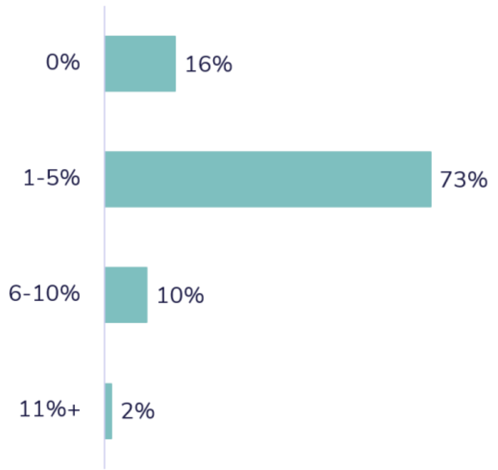
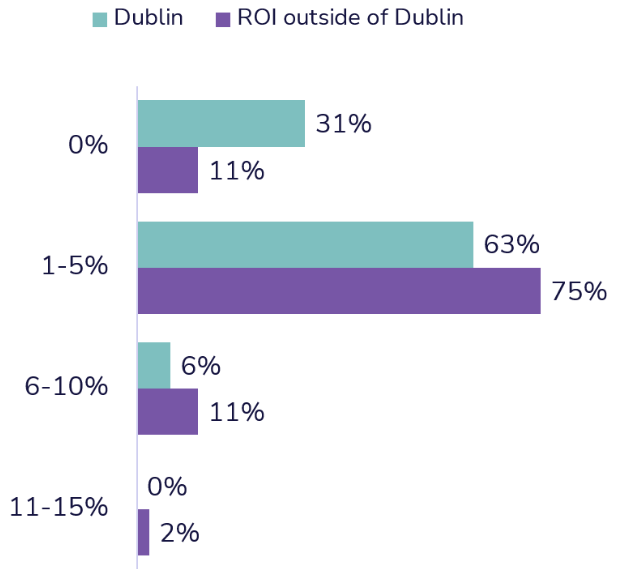


Figure 6.4: percentage of average salary increase – by region



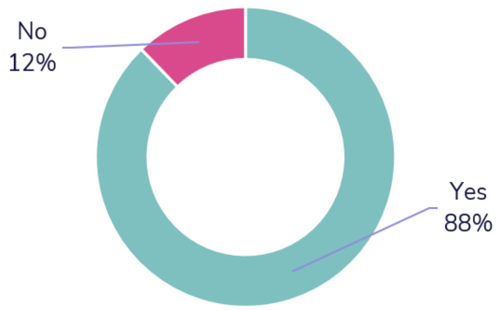
7. Online Booking System

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.

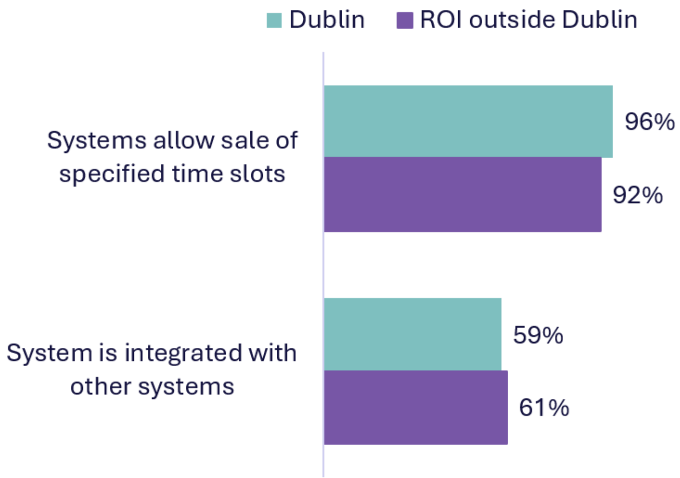
7.1. Proportion of Sites with an Online Booking System

Most attractions who responded to the survey have an online booking system. In 2025, 88% of Dublin attractions and 86% of ROI outside Dublin attractions have an online booking system, with 100% of Northern Ireland respondents having one, which is consistent with last year. Systems allowing specified time-slot sales are available at 96% of Dublin and 90% of ROI outside Dublin attractions. 56% of those with a system have it integrated with other sales and marketing systems.

Figure 7.1 Proportion of sites with an online booking system



7.2. Ticket Sales Systems



7.3. Proportion of Tickets Sold Online in 2025

Around one-third of ticket sales in 2025 came from online channels (34% via own website/email), with walk-ins still the most common route at 49%. Tour operators accounted for 12%, ticket resellers/OTAs 3%, and other channels 2%. This represents a broadly similar pattern to 2024.

Figure 7.3: Distribution of ticket sales by channel in 2025

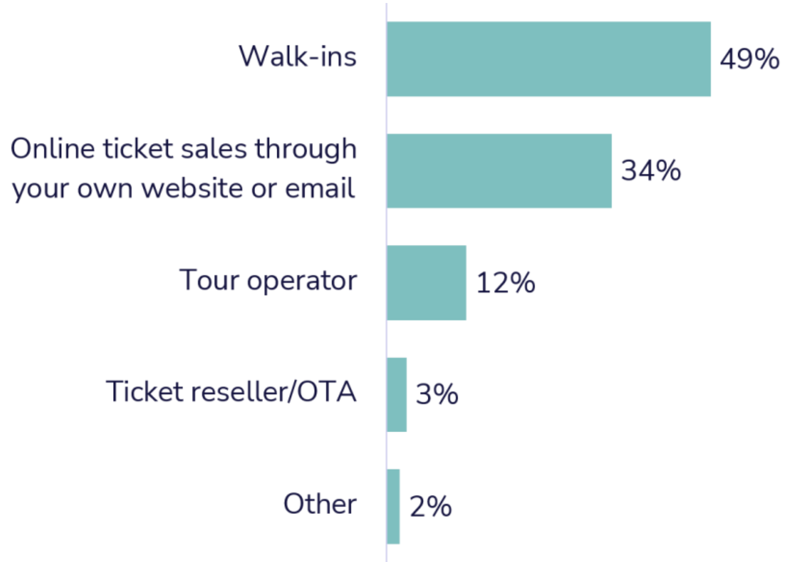
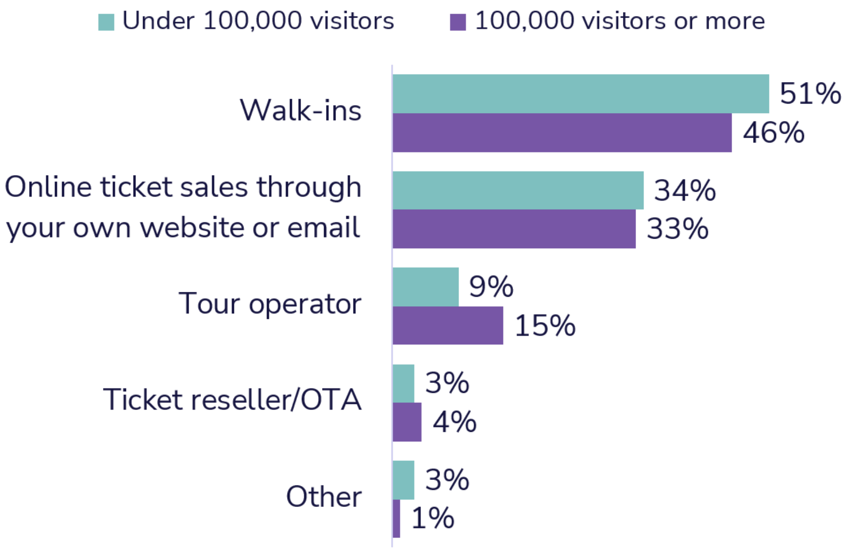


Table 24: Distribution of ticket sales by channel in 2025 – by region

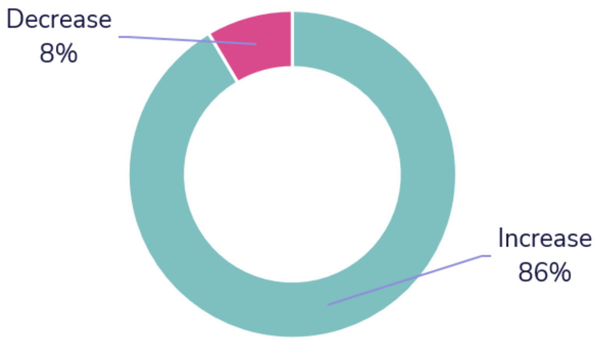
	Dublin	ROI outside Dublin	Northern Ireland
Walk-ins	45%	53%	3%
Online ticket sales through own website or email	42%	29%	41%
Tour operator	5%	15%	14%
Ticket reseller / OTA	5%	2%	3%
Other	4%	2%	4%

Figure 7.4: Distribution of ticket sales by channel in 2025 – by number of visitors



The vast majority of attractions expect online sales to increase further in 2026, particularly outside of Dublin. The online ticket sales question was rewritten for the FY25 survey, so the figure from last year is not directly comparable.

Figure 7.5 Do you expect online ticket sales to increase or decrease in 2026?



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

- Strong shift to digital, making online purchasing simpler and more common
- Increased investment in marketing, especially digital and targeted campaigns driving traffic to booking pages
- Broader offer and incentives (more events, new ticket types, discounts, pre-booking benefits) encouraging purchase in advance.

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

- Continued price and value sensitivity, which may limit online spending.

8. Final Observations

8.1 Outlook for 2026

Thinking to the future, overall sentiment remains cautiously positive, with 48% of respondents feeling positive about the year ahead – down slightly from 53% last wave. Very few feel 'very positive': Dublin 6%, ROI outside Dublin 3%, Northern Ireland 0%. Northern Ireland respondents were most likely to feel quite or very positive overall (86%), compared to 41% in both Dublin and ROI outside Dublin.

Figure 8.1: Outlook for 2026

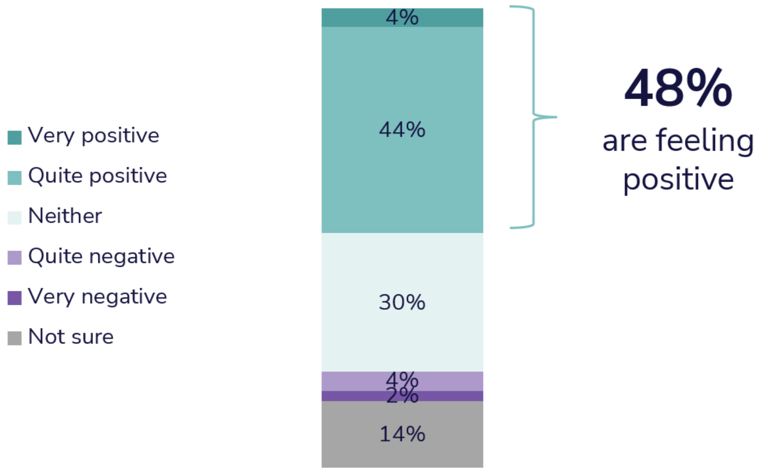


Table 25: Outlook for 2026 – by region

	Dublin	ROI outside of Dublin	Northern Ireland
% feeling very positive	6%	3%	0%
% feeling quite positive	41%	41%	86%
% feeling neutral	31%	32%	0%
% feeling very or quite negative	9%	5%	0%
% not sure	6%	19%	19%

8.2. 'Best Guess' Projections

Most businesses have a generally positive outlook for 2026. 71% of businesses expect an increase in visitor numbers (up from 64% last wave), with an average expected increase of +7.7%. Around one quarter (24%) expect a decrease, with an average expected decrease of -5%. Northern Ireland is most optimistic, with 71% expecting an increase and an average expected rise of +14.3%.

Figure 8.3 does not add to 100% because 10% of respondents chose not to answer this question. Table 26 has redacted the average increase and decrease expected percentages for Northern Ireland due to the base size being too small.

Figure 8.2: Expectations for visitor numbers for 2026

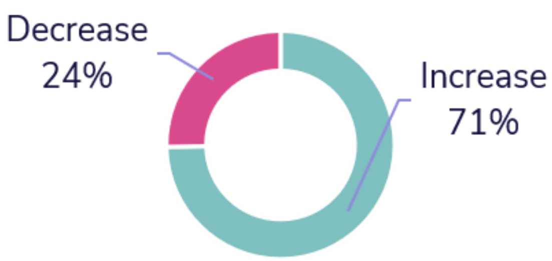


Table 26: Expectations for visitor number changes in 2026 – by region

	Total	Dublin	ROI outside of Dublin	Northern Ireland
% expecting an increase	71%	75%	69%	71%
Average increase expected	7.7%	6.6%	7.6%	14.3%
% expecting a decrease	24%	19%	27%	29%
Average decrease expected	5%	5%	5%	10%

Figure 8.3: Expectations for revenue for 2026

Table 27: Expectations for revenue changes in 2026 – by region

	Total	Dublin	ROI outside of Dublin	Northern Ireland
% expecting an increase	64%	59%	68%	57%
Average increase expected	9.6%	8.6%	9.6%	-
% expecting a decrease	26%	25%	25%	29%
Average decrease expected	9.5%	14.3%	6.7%	-

8.3. Key Factors Influencing Outlook for 2026

The key factors listed by respondents as influencing their outlook for 2026 are the following:

Internal:

- Strong alignment with demand for authentic, immersive experiences
- Ability to leverage sustainability and nature-based experiences to attract more visitors
- Event programming and new experiences expected to drive incremental footfall
- Targeting of domestic and short-break audiences as a key growth lever
- Rising operating costs (including energy, staffing, inflation) constraining marketing, investment, and profitability
- Local differentiation through guides, unique stories and heritage enhancing competitiveness

External:

- Expect more domestic than international visitors due to geopolitical uncertainty which is expected to dampen international travel
- Rise in staycations or shorter holidays due to rising cost sensitivity and promotion via national campaigns
- Growth in experiential, cultural and immersive tourism continuing to shape visitor expectations
- Rise of slow, sustainable and nature-based tourism, influenced by wellness, outdoor activity, eco-tourism trends
- Increased competition & uneven regional visibility, with Dublin/Galway/Kerry dominating over smaller regions in ROI

8.4. Priorities for AVEA for 2026/2027

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

- Stronger advocacy and sector representation (costs, funding, policy influence)
- Greater member networking and knowledge sharing to encourage collaboration and best practice
- Ongoing research and market insights to support planning and decision-making
- Practical support on sustainability, including guidance, securing funding and how this should be implemented
- Training, upskilling and talent development, including careers and new technologies
- Support for managing rising costs and improving business sustainability

Appendices

Appendix 1: List of attractions who were invited to the survey 2025/2026 (AVEA Members and Non-Members)

14 Henrietta Street	Kilbeggan Distillery
1798 Centre & Enniscorthy Castle	Kilkenny Castle
Abbey Theatre	Killary Fjord Boat Tours
Achill Experience Aquarium & Visitor Centre	Killary Fjord Boat Tours
Adare Heritage Centre	Kilmainham Gaol
Aillwee Burren Experience	King Johns Castle
Airfield Estate	Knappogue Castle
An Diseart	Kylemore Abbey
Annesley Garden & Arboretum	Lismore Heritage Centre
Ardgillan Castle	Living Youghal - Youghal Clock Gate Tower and St Mary's Collegiate Church
Armagh Observatory and Planetarium	Loop Head Lighthouse
Athlone Castle & Luan Gallery	Lough Boora Discovery Park
Ballintubber Abbey	Lough Gur
Belvedere House, Gardens and Park	Lough Key Forest Park
Beyond the Trees Avondale	Lullymore Heritage & Discovery Park
Birr Castle Demesne	Malahide Castle
Blarney Castle & Gardens	Marsh's Library
Bru na Boinne/Newgrange	Midleton Distillery Experience
Bunratty Castle & Folk Park,	MoLI Museum of Literature Ireland
Burren Smokehouse	MOUNT CONGREVE GARDENS
Butler Gallery	Muckross House
Caherconnell Fort & Sheepdogs	Museum of Medieval Kilkenny
Canal Boat Restaurant	National Botanic Gardens
Carrick A Rede Rope Bridge	National Gallery of Ireland
Chester Beatty Library	National Leprechaun Museum
Christ Church Cathedral Dublin	National Library of Ireland
Cliffs of Moher Experience	National Museum of Ireland - Collins Barracks
Clondalkin Round Tower Visitor Centre	National Museum of Ireland - Kildare St
Clonfert Farm	National Museum of Ireland - Turlough Park
Cobh Heritage Centre	National Print Museum
Craggaunowen Castle & Crannog	National Wax Museum Plus
Cuilcagh Lakelands Geopark	Navan Centre & Fort

Donegal Castle	Newbridge Silverware Experience
Doolin Cave	Oakfield Park
Doolin Ferries	Patrick Kavanagh Centre
Dublin Castle	Pearse Lyons Distillery
Dublin Discovered Boat Tours	Powerscourt Estates Limited
Dublin Liberties Distillery	Rock of Cashel
Dublinia	Roe & Co Distillery
Dun Aonghusa	Ross Castle
Dunbrody Famine Ship Experience	Rothe House & Garden
Emerald Park	Russborough House
EPIC The Irish Emigration Museum	Saint Canice's Cathedral & Round Tower
Experience Glasnevin	Saint Nicholas' Collegiate Church
Fanad Lighthouse	Saint Patrick Centre
FE McWilliam Gallery	Saint Patrick's Cathedral
Fota House Arboretum & Gardens	Shackleton Experience - Athy Heritage Co. Ltd
Foxford Woollen Mills	Shannon Aviation Museum
Foynes Flying Boat Museum	Skerries Mills
GAA Museum	Slane Castle
Game of Thrones Studio Tour	Sliabh Liag Visitor Centre
Glenarm Castle	Smithwicks Experience
Giant's Causeway	Strokestown Park - The National Famine Museum
GPO Museum	Swords Castle
Guinness Storehouse	Teeling Whiskey Distillery
Hillsborough Castle	The Gobbins Cliff Path
Hook Lighthouse	The Shed Distillery of PJ Rigney
House of Waterford	Thoroughbred Country
Howth Cliff Cruises	Titanic Experience Cobh
Hugh Lane Gallery	Tower Museum
Hunt Museum	Trinity College Dublin
IMMA	Valentia Island Lighthouse
Inis Cealtra Holy Island	Vandeleur Gardens
Irish National Heritage Park	Vintage Tea Trips
Irish National Stud	Westport Estate
Irish Rock n Roll Museum	World of Illusion
Irish Whiskey Museum	
Jameson Distillery	
Johnstown Castle Estate, Museum, and Gardens	

Appendix 3: List of survey questions asked

Q1 Name of visitor experience / attraction

Please provide the name of the attraction and not the name of the operating company (if different).

Q2a Your name

This will be in the survey to enable Spark to contact you in case they have queries regarding your responses.

Please enter your name below

Q2b Please enter your job title

This will be in the survey to enable Spark to contact you in case they have queries regarding your responses.

Please enter your job title below

Information:

The following questions will ask you a bit more about your attraction. The purpose of these questions is to understand how different kinds of organisations are faring within the wider industry. If you have an attraction in more than one location, **please refer to the individual location specified on the email the survey link was attached to.** (If you operate multiple sites, please note that you may have received multiple emails asking you to complete the same survey for each location of your attraction. Please use the separate document provided to complete a survey for each individual location).

Q3a Where is your attraction based?

- ❍ Republic of Ireland
- ❍ Northern Ireland

Slocation In which county is your attraction based?

- ❍ Carlow
- ❍ Cavan
- ❍ Clare
- ❍ Cork
- ❍ Donegal
- ❍ Dublin
- ❍ Galway
- ❍ Kerry
- ❍ Kildare
- ❍ Kilkenny
- ❍ Laois
- ❍ Leitrim
- ❍ Limerick
- ❍ Longford
- ❍ Louth
- ❍ Mayo
- ❍ Meath
- ❍ Monaghan
- ❍ Offaly
- ❍ Roscommon
- ❍ Sligo
- ❍ Tipperary
- ❍ Waterford
- ❍ Westmeath
- ❍ Wexford
- ❍ Wicklow
- ❍ Antrim
- ❍ Armagh
- ❍ Derry/Londonderry
- ❍ Down
- ❍ Fermanagh
- ❍ Tyrone
- ❍ None of the above

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

❍ Urban
❍ Suburban
❍ Rural

Q3c In which tourism region is your attraction located?

❍ Wild Atlantic Way
❍ Ireland's Hidden Heartlands
❍ Ireland's Ancient East
❍ Dublin
❍ Northern Ireland

Q4 Which category best describes your attraction?

Please select all that apply.

❑ Historic site
❑ Visitor heritage centre
❑ Museum / gallery
❑ Visitor garden
❑ Zoo, aquarium or open farm
❑ Natural attraction
❑ Brand experience
❑ Heritage park, leisure or theme park
❑ Other (Please specify)____________

Q5 What kind of organisation are you?

NB: The options offered are the main types; the formal legal structure is not required.

❍ Private limited company (for profit)
❍ Private limited company (not for profit / charitable status)
❍ State body / local authority
❍ Other (Please specify)____________

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

NB: These include any third parties running business or business support operations on your site, irrespective of the nature of the contractual relationship.

❍ Yes
❍ No

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

Please select all that apply

- ❑ Retail
- ❑ Food & Beverage
- ❑ Cleaning
- ❑ Facilities management
- ❑ Parking
- ❑ Other (Please specify)____________

Q7 How many weeks were you open to visitors in 2025?
Please enter a number between 0 and 52

Q8 Do you charge for admissions?

- ❍ Yes
- ❍ No

Information:

The following questions will ask you a bit more about the financial details of your attraction. These figures help provide key numbers in the AVEA reports on the health of the industry. A reminder that if something isn't relevant to your business you can select 'prefer not to answer'. **We have indicated where questions would be particularly beneficial to AVEA to receive an answer by highlighting them in yellow.**

Please be assured again that your answers will be aggregated in our analysis and our report will not identify any individual or company.

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

NB: As we have some attractions based in Northern Ireland, we will now provide the option for people to complete the survey in either GBP or Euro.

- ❍ GBP
- ❍ EURO

Q9a What was your total revenue in 2025, net of VAT

If revenue and profit are not available for the calendar year 2025, please provide the total for your most recent financial year.

❑ Prefer not to answer

Q9b What was your gross profit in 2025?

If revenue and profit are not available for the calendar year 2025, please provide the total for your most recent financial year.

❑ Prefer not to answer

Q10 What percentage of your revenue in 2025 came from the following sources?

Please provide percentages for different sources to the extent possible.

Please enter a number between 0 and 100 for each prompt - ensuring the total sums to 100%

Ticket / Admission Sales	______________________
Gift Shop	______________________
Café / Restaurant	______________________
Events & Festivals	______________________
Private hires (corporate, weddings etc.)	______________________
Concessions (café, retail etc.)	______________________
Rental	______________________
Parking & E-charging Fees	______________________
Annual Memberships	______________________
Sponsorship	______________________
Grants (eg Pobal, Heritage Council, other grant programmes)	______________________
Gifts / donations / philanthropy	______________________
Other (Please specify)__________	______________________

❑ Prefer not to answer

Q11a What was the average ticket sale price per visitor in 2025 (net of VAT)?

NB: This should be total ticket revenue, net of VAT, divided by the number of tickets sold (i.e. paying visitors).

❑ Prefer not to answer

Q11b Have you increased your ticket prices for 2026?

❍ Yes
❍ No
❍ Prefer not to answer

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

❑ Prefer not to answer

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)

❍ Yes
❍ No
❍ Prefer not to answer

Q13 If you sell annual membership, what was your percentage retention rate for 2025?

❍ Not relevant. Do not sell annual memberships
❍ Prefer not to answer

Q14a What was the average retail spend per visitor in 2025 (net of VAT)?

NB: This should be total retail sales divided by total number of visitors - including complimentary visitors

❑ Prefer not to answer

Q14b And, in your gift shop, what is your average transaction value (ATV)?

NB: ATV is the total value of transactions, divided by the total number of transactions

❑ Prefer not to answer

Q14c What percentage of your visitors do you estimate purchase something from your shop?

❑ Prefer not to answer

Q15a What was the average food and beverage spend per visitor in 2025 (net of VAT)?

NB: This should be total food and beverage sales divided by total number of visitors - including complimentary visitors

❑ Prefer not to answer

Q15b What percentage of your visitors do you estimate purchase something from your cafe?

Please enter a number between 0% and 100%

❑ Prefer not to answer

Q16a What was your total operational expenditure in 2025?

NB: The relevant information should be available in your annual management accounts; the total should add to match your total expenditure for the year, including accruals. Do not include depreciation, interest, capital expenditure or taxes.

❑ Prefer not to answer

Q16b Was your Operational Expenditure up or down versus 2024?

❍ Up by more than 20%
❍ Up by 10-19%
❍ Up by 1-9%
❍ Approximately the same as 2024
❍ Down by 1-9%
❍ Down by 10-19%
❍ Down by more than 20%
❍ Prefer not to answer

Q17a What was the breakdown of your operational expenditure in 2025 across the following categories?

Please enter a number between 0 and 100 for each prompt - ensuring the total sums to 100%

Staff (including contractors)	____________
Marketing / Sales (not including staff)	____________
Energy	____________
Insurance	____________
Rent	____________
Local Authority Rates	____________
Repairs and maintenance	____________
Cleaning	____________
Other (Please specify)____________	____________

❑ Prefer not to answer

Q17b What was the breakdown of your operational expenditure in 2025 across the following categories as a % of your total turnover?

Please note that total will not add to 100% as it's a percentage of turnover, not spend.

Staff (including contractors)	____________
Marketing / Sales (not including staff)	____________
Energy	____________
Insurance	____________
Rent	____________
Local Authority Rates	____________
Repairs and maintenance	____________
Cleaning	____________
Other (Please specify)____________	____________

❑ Prefer not to answer

Q18 Is your business registered for VAT?

❍ Yes
❍ No
❍ Prefer not to answer

Q19 In your most recent insurance renewal, has the price changed?

❍ Yes
❍ No
❍ Prefer not to answer

Q20a Has your insurance increased or decreased?

❍ Increased
❍ Decreased
❍ Prefer not to answer

Q20b By what percentage has your insurance increased / decreased?

❑ Prefer not to answer

Information:

The following questions will ask you a bit more about the people who visit your attraction. This helps to give key information on tourism health and make-up.

Q21a How many visitors did you receive in 2025?

❑ Prefer not to answer

Q21b Please breakdown, as best you can, the total number of visitors by source market for 2025?

Please complete to the extent to which you have data available.

Please enter a number between 0 and 100 for each prompt - ensuring the total sums to 100%

Ireland	______________________
Northern Ireland	______________________
Britain	______________________
Germany	______________________
France	______________________
Italy	______________________
Spain	______________________
Other European Markets	______________________
USA	______________________
Canada	______________________
China	______________________
India	______________________
Middle East	______________________
Australia / New Zealand	______________________
Other (Please specify)__________	______________________

❑ Prefer not to answer

Q22 What percentage of your admissions came from the following ticket categories in 2025?

Please complete to the extent to which you have data available.

Please enter a number between 0 and 100 for each prompt - ensuring the total sums to 100%

Individuals (adults, children, families, concessions)	____________________
Groups - education (schools or colleges)	____________________
Groups - group tours	____________________
Groups - day tours	____________________
Groups - cruise ships	____________________
Groups - private corporate bookings	____________________
Memberships	____________________
Events / festivals	____________________
Other (Please specify)____________	____________________

❑ Prefer not to answer

Q23 What was the seasonal distribution of your business in 2025? What share of your total number of visitors did you have each month?

Please enter a number between 0 and 100 for each prompt - ensuring the total sums to 100%

January	____________________
February	____________________
March	____________________
April	____________________
May	____________________
June	____________________
July	____________________

August ______________________

September ______________________

October ______________________

November ______________________

December ______________________

❑ Prefer not to answer

Information:

The following questions will ask you a bit more about the people you employ at your attraction.

Q24a How many staff did you employ in 2025 in each group in management positions?

Base this on peak season employment level; include staff employed on site by concessionaires and contractors. 'Management' refers to senior management team – i.e. CEO/GM & Department Heads .

Full-time year round ______________________

Part-time year round ______________________

Seasonal ______________________

Volunteers ______________________

❑ Prefer not to answer

Q24b How many staff did you employ in 2025 in each group NOT in management positions?

Base this on peak season employment level; include staff employed on site by concessionaires and contractors. 'Management' refers to senior management team – i.e. CEO/GM & Department Heads .

Full-time year round ______________________

Part-time year round ______________________

Seasonal ______________________

Volunteers ______________________

❑ Prefer not to answer

Q25a What are the principal obstacles to the employment of new staff in 2026?

What are the principal obstacles to the employment of new staff in 2026? If you do not have any of the below obstacles, please skip this question.

Please number the list of options 1-7 in order of preference, with 1 being the biggest obstacle

____ Working hours

____ Pay

____ Availability of accommodation for staff

____ Candidates lacking requisite skills

____ Lack of candidates

____ Competition from other tourism businesses

____ Seasonality of employment

Q25b What other barriers were you thinking about as obstacles to employment of new staff in 2026?

❑ Prefer not to answer

Q26 What are your principal needs regarding recruitment of staff in 2026?

Please select all that apply

- ❑ Finance
- ❑ Guides
- ❑ Kitchen
- ❑ Retail
- ❑ Facilities
- ❑ Sales & Marketing
- ❑ Curatorial
- ❑ General front-of-house staff
- ❑ Mid-management
- ❑ Senior management
- ❑ Other (Please specify)____________
- ❍ Prefer not to answer

Q27 In 2025 what percentage of your staff were on National Minimum Wage?

Please enter a number between 0 and 100 for each prompt.

Full time ______________________________

Part time ______________________________

Seasonal ______________________________

- [ ] Prefer not to answer

Information:

The purpose of these questions is to enable the establishment of benchmarks for pay in the AVEA sector. Not all of the categories of employee listed may apply to you. Please complete as accurately as you can. Please note you are asked to provide 2025 information for questions 28-30.

Q28a What was the lower end of hourly rate of pay for:

Please leave the row blank if you do not employ anyone in those areas.

Front of house / visitor services staff ______________________

Guides ______________________

Maintenance ______________________

Admin Assistants ______________________

Gardeners ______________________

Team leaders / supervisors ______________________

❑ Prefer not to answer

Q28b What was the upper end of hourly rate of pay for:

Please leave the row blank if you do not employ anyone in those areas.

Front of house / visitor services staff ______________________

Guides ______________________

Maintenance ______________________

Admin Assistants ______________________

Gardeners ______________________

Team leaders / supervisors ______________________

❑ Prefer not to answer

Q29a What was the lower end of annual salary range for:

Please leave the row blank if you do not employ anyone in those areas.

General manager / CEO ______________________

Heads of department ______________________

Assistant heads of department ______________________

Marketing executives ______________________

Accountants ______________________

Curators ______________________

❑ Prefer not to answer

Q29b What was the upper end of annual salary range for:

Please leave the row blank if you do not employ anyone in those areas.

General manager / CEO ______________________

Heads of department ______________________

Assistant heads of department ______________________

Marketing executives ______________________

Accountants ______________________

Curators ______________________

❑ Prefer not to answer

Q30 For those staff not on national minimum wage, what was the average % salary increase applied in 2026 vs 2025?

❑ Prefer not to answer

Information

The following questions will ask you a bit more about how people go about booking tickets to your attraction.

Q31a Do you have an online booking system?

❍ Yes
❍ No
❍ Prefer not to answer

Q31b Does your booking system allow for online sale of tickets with specified time slots?

❍ Yes
❍ No
❍ Prefer not to answer

Q32 Is your ticket sales system integrated with other sales and marketing systems?

Please select all that apply

❑ Retail POS
❑ Food & Beverage POS
❑ CRM / Database
❑ Other (Please specify)____________
❍ Not integrated with any other systems
❍ Prefer not to answer

Q33 Please breakdown, as best you can, the percentage of tickets you sold through the following channels in 2025

❑ Walk-ins
❑ Online ticket sales through your own website or email
❑ Tour operator
❑ Ticket reseller/OTA
❑ Other (Please specify)____________
❍ Prefer not to answer

Q34 Do you expect online ticket sales through your own website or email to increase or decrease in 2026?

❍ Increase
❍ Decrease
❍ Prefer not to answer

Q35 Why do you expect online ticket sales from your own website or email to increase or decrease?

Please give as much detail as possible.

❑ Prefer not to answer

Q36 Looking back at 2025, did you notice any trends or changes in customer or market behaviour that impacted your business performance, either positively or negatively?

Please give as much detail as possible.

❑ Prefer not to answer

Information

The last few questions will ask you about your thoughts and predictions for 2026, compared with 2025.

Q37a Do you expect an increase or decrease in visitor numbers in 2026?

- ❍ Increase
- ❍ Decrease
- ❍ Prefer not to answer

Q37b By what percentage do you expect your visitor numbers to increase / decrease?

❑ Prefer not to answer

Q38a Do you expect an increase or decrease in revenue (net of VAT) in 2026?

- ❍ Increase
- ❍ Decrease
- ❍ Prefer not to answer

Q38b By what percentage do you expect your revenue to increase / decrease?

❑ Prefer not to answer

Q39 What are the key internal factors influencing your outlook for 2026?

Please give as much detail as possible.

❑ Prefer not to answer

Q40 What are the key external factors influencing your outlook for 2026?

Please give as much detail as possible

❑ Prefer not to answer

Q41 Which of the following best describes how you are feeling about the year ahead?

❍ Very positive
❍ Quite positive
❍ Neither
❍ Quite negative
❍ Very negative
❍ Not sure
❍ Prefer not to answer

Q42 What key tourism trends do you think will impact your attraction in 2026? What do you anticipate their impact to be?

Please give as much detail as possible.

❑ Prefer not to answer

Q43 (Members Only): 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?

Include, as appropriate, activities that AVEA is not currently doing as well as existing areas of activity that you would like to see expanded.

Please give as much detail as possible.

❑ Prefer not to answer

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:

❍ I give my permission to be recontacted
❍ I do not give my permission to be recontacted

Q44 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

Please give as much detail as possible

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