

NI Visitor Attraction Statistics (January-December 2014)

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This report provides analysis of the 2014 Northern Ireland Visitor Attraction Survey. The key findings for responding attractions are:

- there were 15.3 million visits to visitor attractions in 2014;
- between 2013 and 2014 there was an overall 3% increase in the number of visits – with visits to the headline attractions (Giant's Causeway and Titanic Belfast) increasing by 5%;
- a significant majority of attractions indicated that revenue had increased in 2014;
- almost two-thirds (63%) of visits were made by Northern Ireland residents; and
- Country Parks/Parks/Forests accounted for 38% of all visitors in 2014.

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Introduction

This report is designed to give an overview of the performance of the Visitor Attraction market in Northern Ireland in 2014. Participation by attractions in the Visitor Attraction Survey is voluntary. A survey was issued to 389 attractions (details obtained from Discover Northern Ireland) and 241 attraction owners replied; of these 188 provided data for analysis. Unless otherwise stated, the data presented in this report refers to these 188 attractions.

Statistics presented in this report are given in good faith on the basis of information provided by proprietors of attractions.

Respondents to the survey are given the opportunity to revise data supplied in the previous year. Participants are also given the option for their information to remain confidential. Counting methods for individual Attractions may also change from year to year which might impact on results and patterns over time. Further details about the survey methodology are contained in the methodology section.

Types of Attractions

Figure 1: Percentage of Attractions by Attraction Category

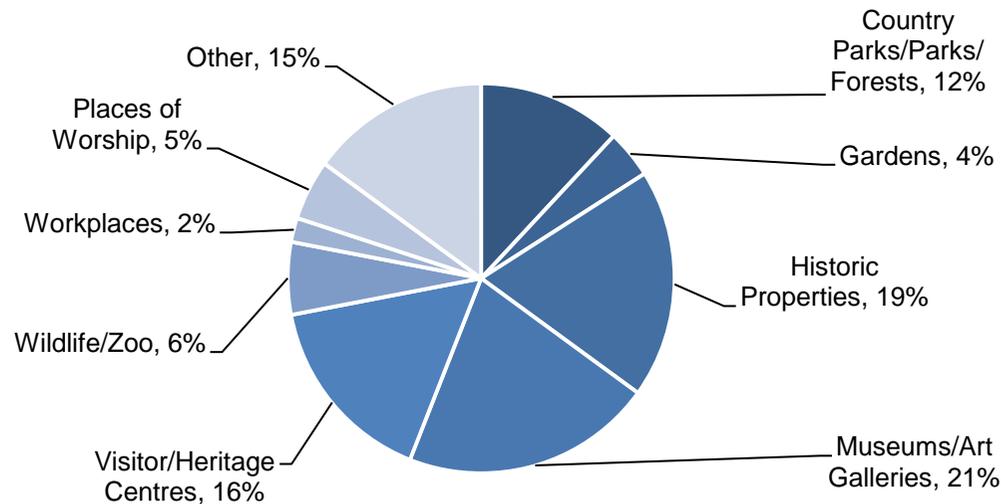
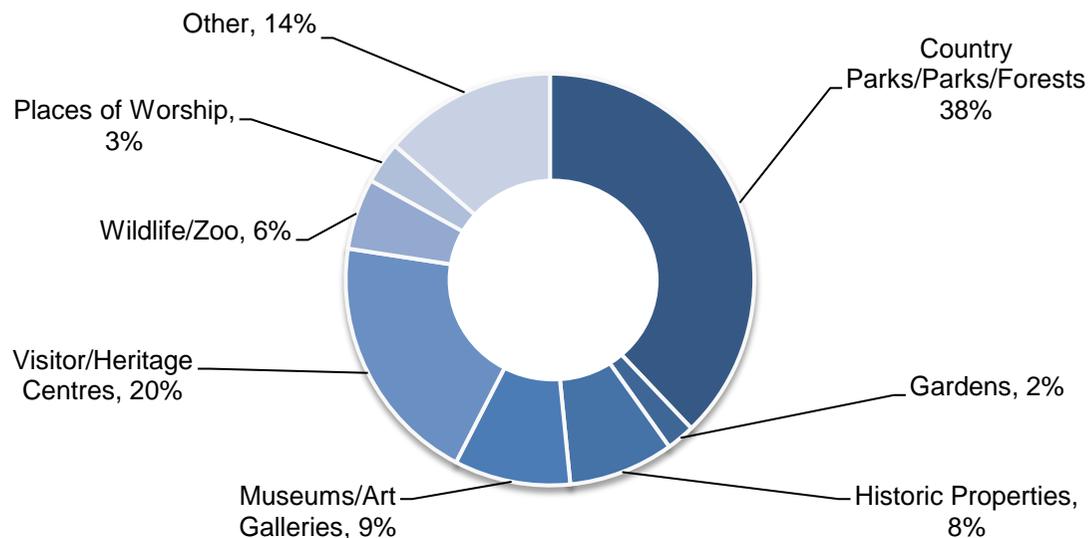


Figure 1 shows the proportion of responding attractions in each category. In 2014, the largest proportion of the 188 responding attractions were Museums/Art Galleries (21%) followed by Historic Properties (19%).

Figure 2: Percentage of Visits by Attraction Category

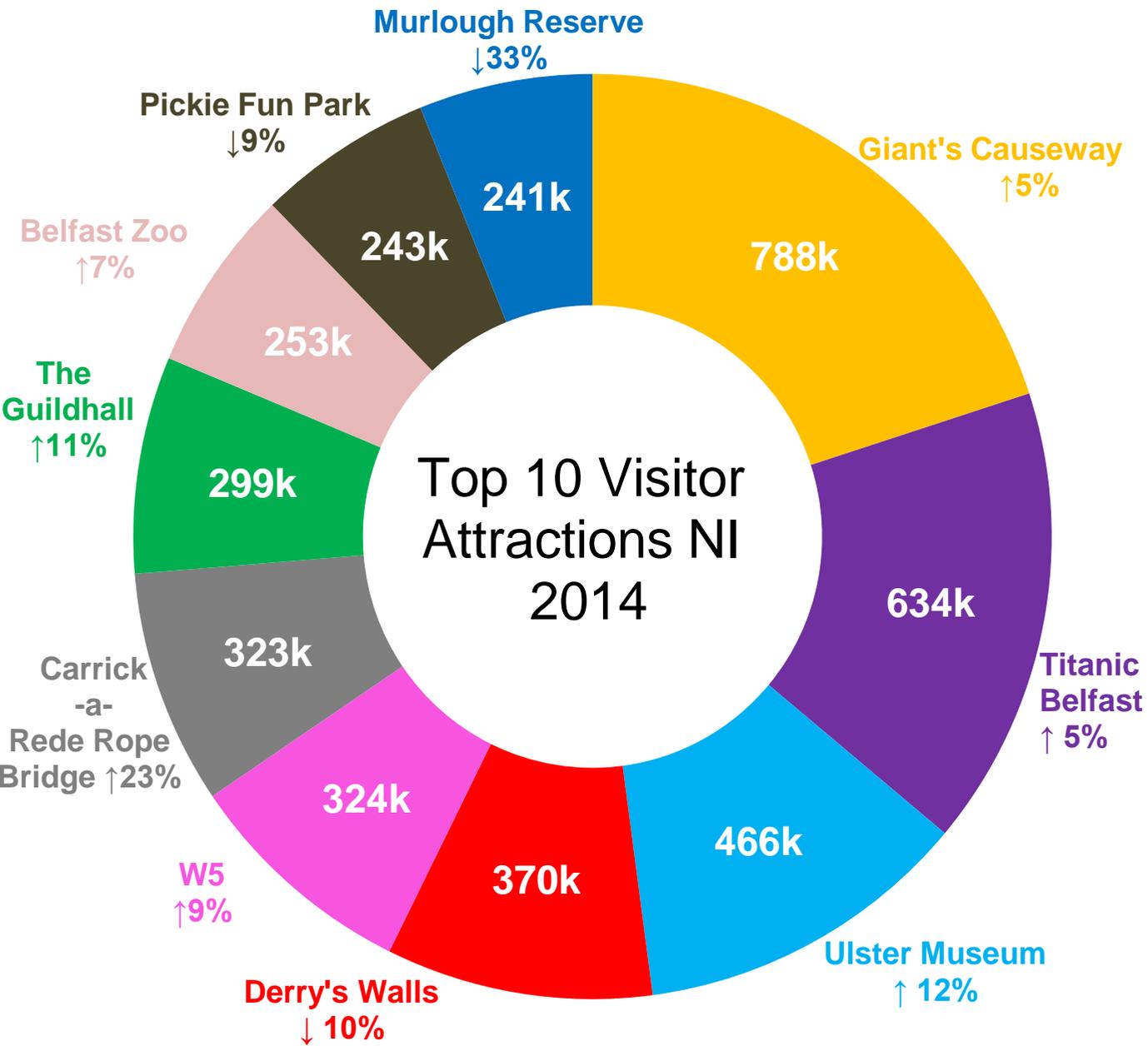


During 2014 over 15 million visits were made to participating attractions. Country parks/parks/forests attracted the largest proportion of visitors (38%). Visitor/heritage centres attracted the second highest proportion of visitors during 2014 (20%).

In total 168 participants returned data with figures for both 2013 and 2014. These showed that there was a 3% increase in visitor numbers between 2013 and 2014.

*Workplaces do not appear in Figure 2 as they accounted for less than 1% of visits to attractions in 2014.

Figure 3: Top Ten Visitor Attractions 2014 (excluding Country parks/ parks/ forests/gardens)



Excluding country parks/parks/forests and gardens last year there were 9.2 million visits to attractions in Northern Ireland.

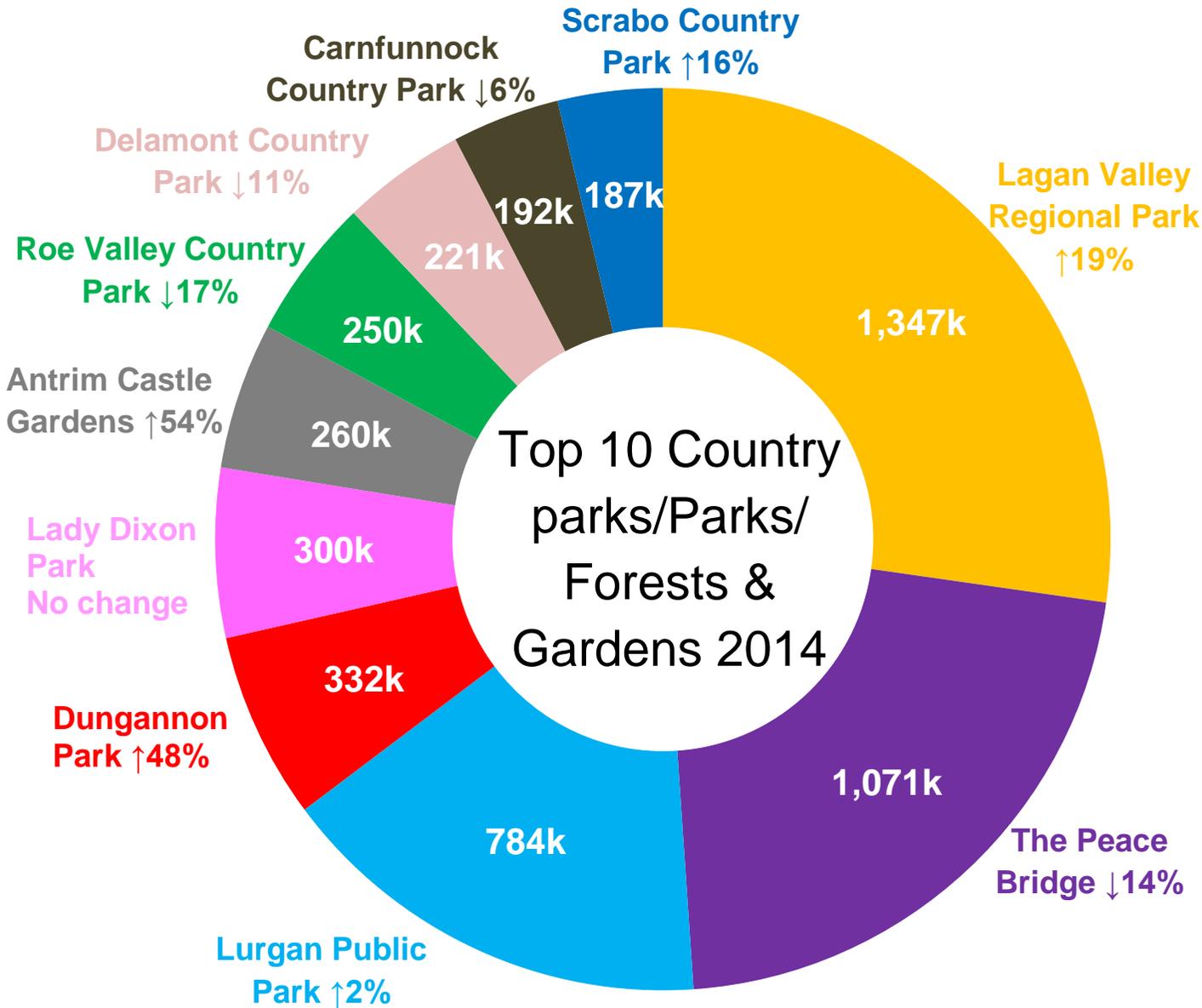
Within this group the Giant's Causeway world heritage site attracted the highest number of visits (0.79 million). This was a 5% increase on 2013.

Titanic Belfast attracted the second highest number (0.63 million visits). This was also a 5% increase on 2013.

In total the top ten attractions had 3.9 million visits in 2014 – this was an increase of 2% to these ten attractions in 2013.

*Arrow indicates increase/decrease between 2013 - 2014

Figure 4: Top Ten Visitor Country parks/parks/forests/gardens 2014



During 2014 over 6.1 million visits were made to Northern Ireland country parks, parks, forests and gardens. Visitors to the top ten country parks/parks/forests/gardens accounted for almost 4.9 million visits - this was an increase of 4% to these ten country parks, parks, forests and gardens in 2013.

Lagan Valley Regional Park attracted the highest number of visitors. Over 1.3 million visitors visited the park during 2014 – a 19% increase in the number of visitors when compared to 2013.

The Peace Bridge, attracted the second highest number of visitors with 1.1 million visitors which was a 14% decrease compared to 2013. In part this decrease may be due to a fall off after the City of Culture year in 2013.

*Arrow indicates increase/decrease between 2013 - 2014

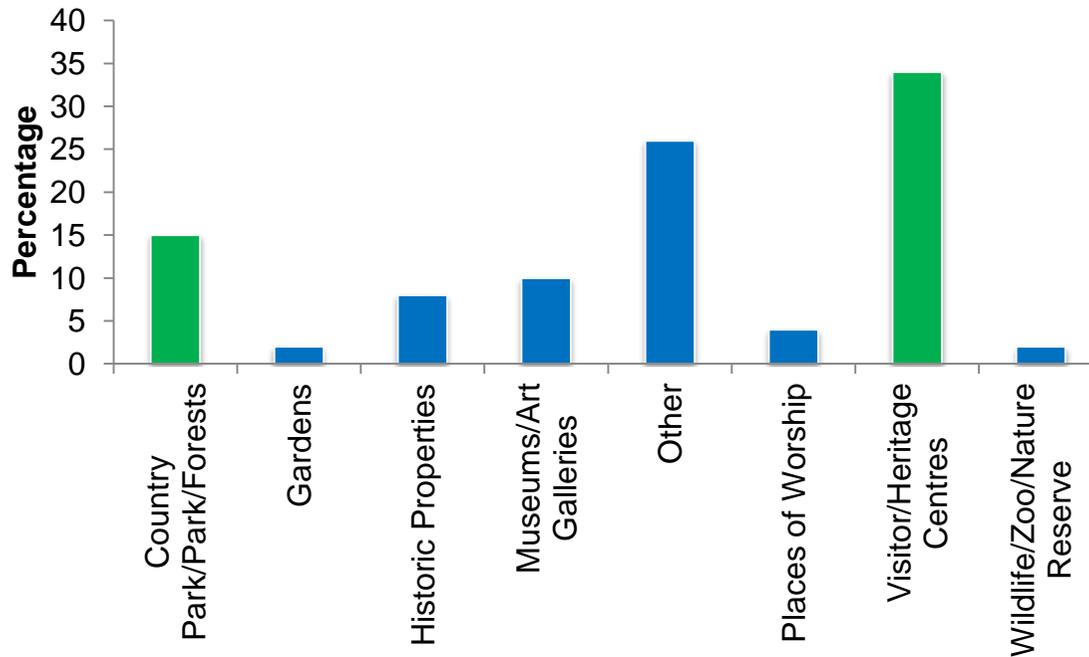
Residency of Visitors

Figure 5: Proportion of Attraction Visitors by Place of Residence



Respondents to the survey were also asked to provide information on the country of residence of their visitors. Respondents who replied reported 63% of visits were made by residents of Northern Ireland.

Figure 6: Proportion of Visitors External to NI by Attraction Type

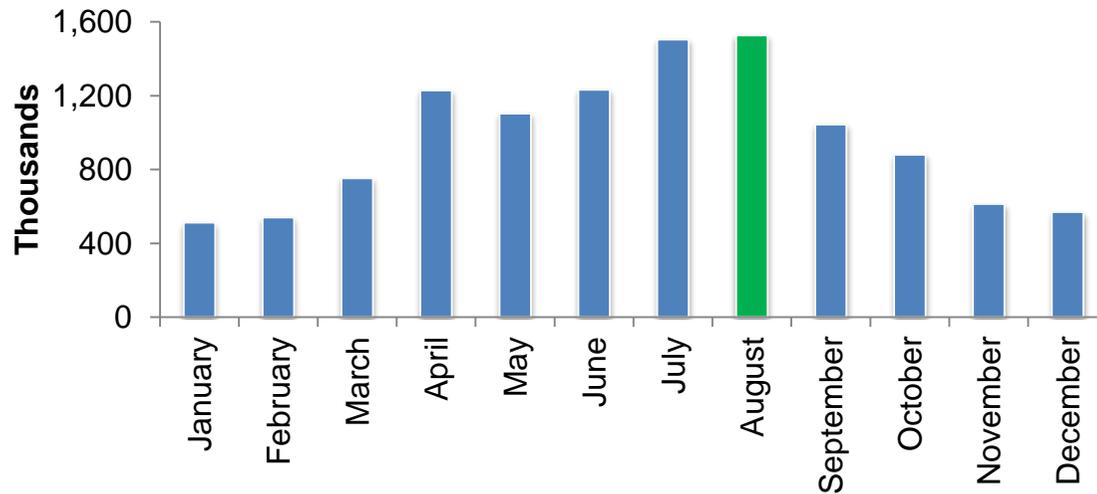


Of the 37% of visitors external to NI approximately 10% were from the Republic of Ireland, 8% were from Great Britain and 18% from outside the UK and Ireland.

The proportion of visitors external to NI by attraction type can be seen in figure 6. Visitor/Heritage centres attracted the largest proportion (34%) followed by Country parks/parks and forests with 15%. This points towards visitors external to NI being drawn towards the larger visitor attractions such as Giant's Causeway / Titanic Belfast in the Visitor/Heritage Centre category.

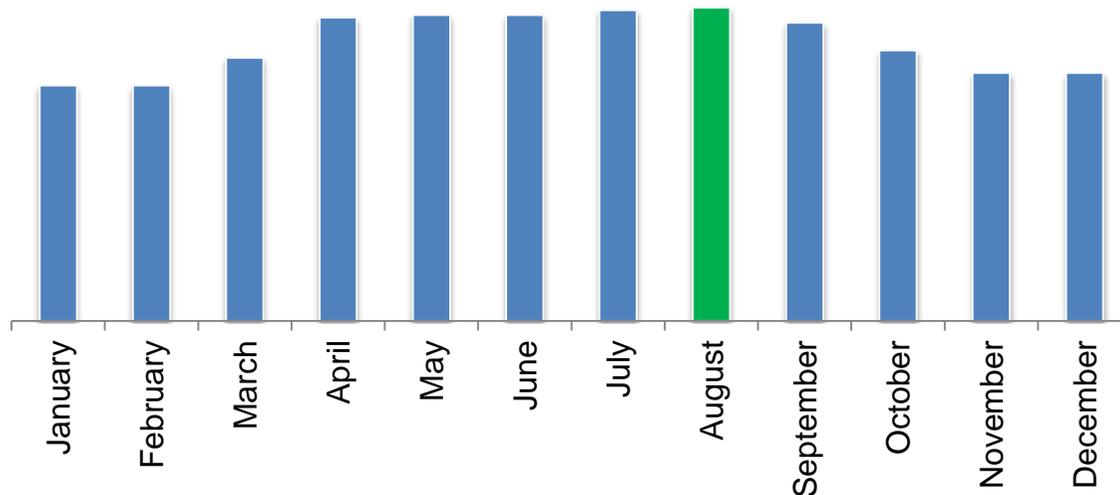
Seasonality

Figure 7: Number of Visits to Attractions by Month (Thousands)



Of the responding attractions August was the most popular month with over 1.5 million visits recorded. The least popular month was January with a total of 0.5 million visits made during the month.

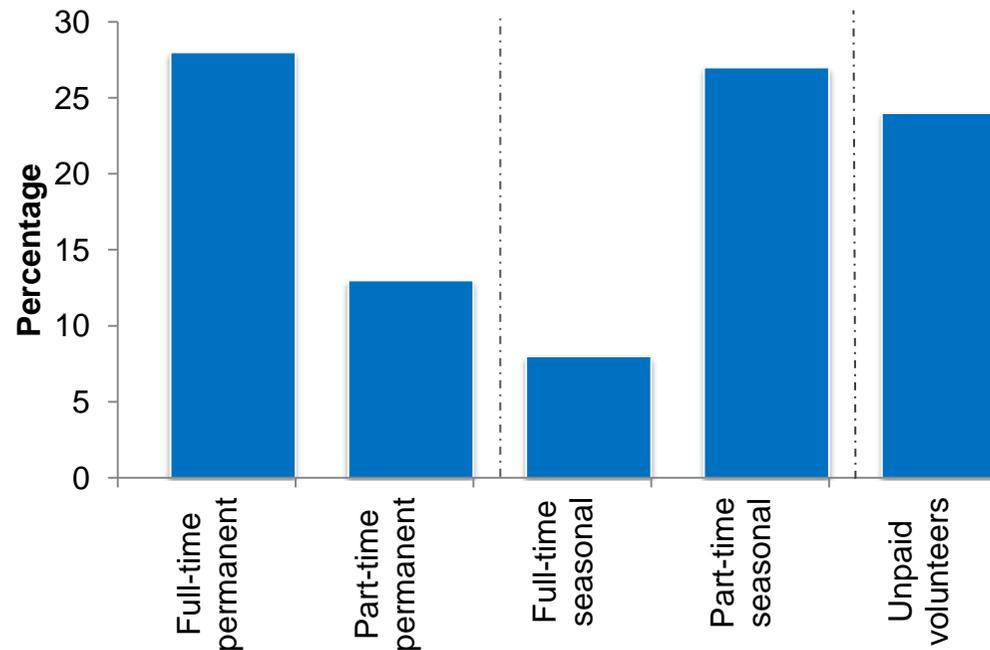
Figure 8: Seasonality of Attraction Opening



In total 126 respondents supplied information on the months attractions were open (partially or fully). The number of attractions indicating they were open (partially or fully) each month of 2014 varied slightly over the year with the highest number of attractions open in August (125) and the lowest number open in the months of January and February (94).

Employment

Figure 9: Employment Type



A total of 144 attractions provided information on employment totalling 2,895 employees and volunteers. Around a quarter of staff were employed on a full time permanent basis (28%).

Admission charges

Of the 55 attractions responding with information on admission charges the highest admission charge per adult was £15.50 while the highest admission charge for a child was £7.25. Lowest admission charges reported were £1.60 per adult and £0.00 for children where the attraction charged for adults but there was no charge for children.

Revenue

Of the 66 respondents who supplied information on revenue 62% reported revenue had increased when compared to 2013, while 36% reported that revenue was down and 2% reported similar revenue to the previous year.

Upgrades

In 2014 32 attractions indicated they had upgraded or made improvements to their attraction. The median spend on upgrades was £17,500 with attractions spending from under £1,000 to over £1,000,000.

Adult child ratios

The average overall ratio of adult to child visitors during 2014 for responding attractions (126) was 79% adult to 21% children.

Methodology

In total 389 attractions across Northern Ireland were invited to participate in the 2014 Visitor Attraction Survey by means of a self-completion questionnaire. The list of attractions was obtained from Tourism Northern Ireland (TNI).

In 2014 there was a 62% response rate with 189 respondents providing visitor numbers. A further 52 attractions responded indicating they were closed; that their numbers were included with another attraction; their visitor numbers were not recorded; or they were unable to provide visitor numbers to the attraction element of their business.

Respondents to the survey were asked to classify the attractions from a given list of categories and the classifications which they provided were used in the analysis of this report.

Participants were also given the option for their figures to remain confidential. A list of participating attractions, excluding those who requested that their visitor numbers remain confidential, is contained in the appendix.

For the purpose of this research a visitor attraction is defined as:

'... an attraction where it is feasible to charge admission for the sole purpose of sightseeing. The attraction must be a permanently established excursion destination, a primary purpose of which is to allow access for entertainment, interest, or education; rather than being primarily a retail outlet or a venue for sporting, theatrical, or film performances. It must be open to the public, without prior booking, for published periods each year, and should be capable of attracting day visitors or tourists as well as local residents. In addition, the attraction must be a single business, under a single management, so that it is capable of answering the economic questions on revenue, employment etc. and must be receiving revenue directly from visitors'.

Details regarding individual attractions (description, address, contact details etc.) may be obtained by visiting www.discovernorthernireland.com.

Where this report refers to 'visits' to attractions, unless specified as 'out-of-state visits' this refers to all visits made to an attraction, regardless of the country of residence of the visitor, therefore including Northern Ireland residents.

For the purpose of analysis, the attractions have been classified by types (e.g. country parks/parks/forests, gardens, historic properties, museums/art galleries, visitor/heritage centres, wildlife/zoo, workplaces and places of worship). The procedure excluded establishments whose main component is a retail or leisure facility. It is, however, recognised that these facilities do offer a significant service to both the home market and out-of-state visitors.

Abbreviations:

LA	Local Authority
G	Government Department/ Agency
NT	National Trust
OTC	Other Trust/Charity
O	Other
P	Private

Visitor figures:

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It should be noted that respondents to the survey are given the opportunity to revise data supplied in the previous year. Counting methods for individual Attractions may also change from year to year which might impact on results and patterns over time. Full information on visitors to Northern Ireland during 2014 can be found at [NI Visitor Attraction Statistics Additional Tables](#)

Data Revisions

The information here-in may be subject to revision due to improvements to the survey/analysis methodology or the inclusion of data returned after the publication date. The figures presented in this bulletin are the most up-to-date available at the time of publication. Full information on the revision of tourism statistics can be found at [Tourism Statistics Branch Revisions Policy](#)

A full picture of all tourism activity can be found in the [Northern Ireland Annual Tourism Statistics Publication](#).

Further Information

Tables containing data used in this publication can be found at: [NI Visitor Attraction Statistics Additional Tables](#).

For more information relating to this publication or if an alternative format is required, please contact us at tourismstatistics@dfpni.gov.uk

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