

NORTHERN IRELAND VISITOR ATTRACTION SURVEY (JANUARY-DECEMBER 2011)

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This report provides the analysis of the most recent (January-December 2011) annual information from the Visitor Attractions Survey in Northern Ireland. The figures for participating visitor attractions show:

- There were approximately 12.4 million visits made during 2011.
- There was a 5.9 percent increase on the number of visitors to attractions from 2010 to 2011.
- Country Parks/Parks/Forests account for the largest proportion of visitors in 2011 (40%).
- Northern Ireland residents accounted for 76% of all visits made in 2011.
- August was the most popular month for visits to the attractions (1.3 million visitors)

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Introduction

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Introduction

This report is designed to give an overview of the number of visits to the various attractions within Northern Ireland. Participation in the Visitor Attraction Survey is voluntary.

The survey was issued to 380 attractions (details obtained from Discover Northern Ireland) and 160 replied, of these 140 provided data for analysis. The data presented in this report therefore only refers to the 140 attractions that participated, unless otherwise stated.

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

It should be noted that attractions are given the opportunity to revise previous years data. Attractions also may have changed their method for counting visitors which might impact on results and patterns over time. Further details about the survey methodology are contained in Section 9.

Executive Summary

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Types of Attractions

In 2011, under a quarter of the participating attractions were museums/ art galleries (23%) and under a fifth (19%) were historic properties.

Ninety seven percent of the 140 responding attractions provided details on the methods used to calculate visitor numbers. The most frequent methods were ticket sales/group bookings and manual count, with 26% each.

The majority of participating attractions were owned by Local Authorities (31%) and Government Department/Agency (21%).

Visitor Numbers

In 2011, there were approximately 12.4 million visits made to the participating visitor attractions. For participants who provided both 2010 and 2011 data, there was a 5.9 percent increase on the number of visitors.

Country parks/parks/forests attracted the largest numbers of visitors (40%). Workplaces accounted for the lowest proportions of visits, with a combined total of less than 1%.

Visitor Profile

Northern Ireland residents account for 76% of all visits to participating attractions in 2011. There was a ratio of 71% adults to 29% children visiting the attractions in 2011.

Seasonality

August was the most popular month for visits (1.3 million).

Admission Charges

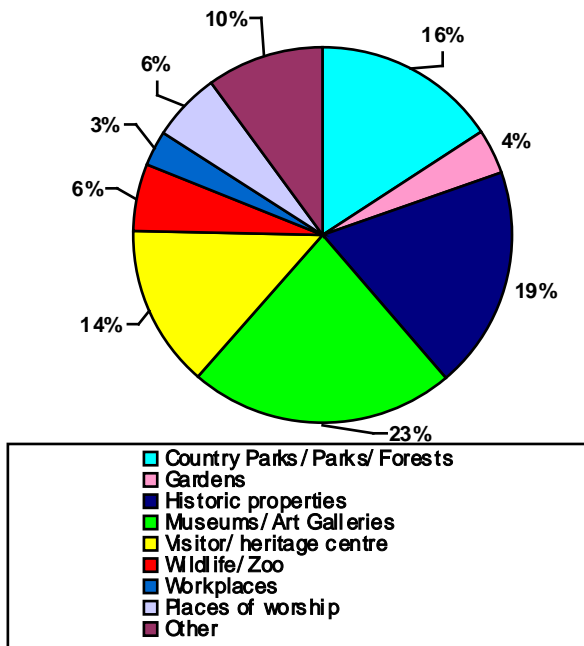
The average admission charges were £5.30 per adult and £3.50 per child in 2011.

Types of Attractions

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Figure 1 shows the proportion of responding attractions in each category. In 2011, under a quarter of the 140 participating attractions were museums/art galleries (23%) and under a fifth (19%) were historic properties.

Figure 1: Responding attractions by category type, 2011



In 2011, 97% of the 140 attractions provided details on the methods used to calculate visitor numbers. The most frequent methods were ticket sales/group bookings and manual count (both 26%). Table 1 shows the methods of recording visitor numbers.

Table 1: Method of recording visitor numbers, 2011

Method used to record data	Percentage (%)
Ticket or group bookings	26
Manual count	26
Estimate	23
Mechanical or electronic	15
Sample count	6
Other	4
Total (136 responding attractions)	100

Table 2 shows the breakdown of the 140 participating attractions by ownership. The majority of participating attractions were owned by local authorities (31%) and Government Department/Agency (21%).

Table 2: Ownership of attractions, 2011

	Percentage (%)
Local Authority	31
Government Department/Agency	21
National Trust	6
Other Trust/charity	9
Other	16
Private	16
Total (140 responding attractions)	100

*percentage might not sum to 100 due to rounding

Visitor Numbers

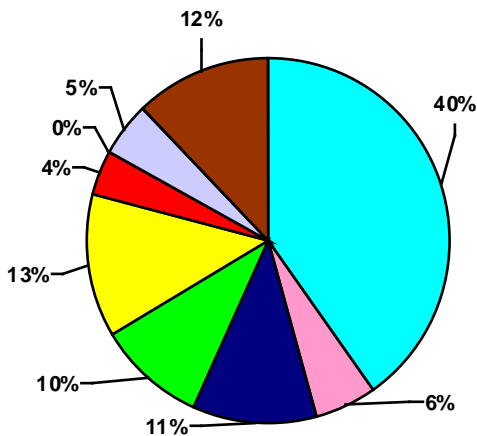
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Approximately 12.4 million visits were made to participating visitor attractions during 2011. One hundred and twenty four participants returned data with comparable figures for 2010 and 2011. These showed there was a 5.9 percent increase on the visitor numbers observed in 2010.

Figure 2 shows where the 12.4 million visitors in 2011 visited by attraction category. Country parks/parks/forests attracted the largest numbers of visitors (40%). Workplaces accounted for the lowest proportions of visits, with a combined total of less than 1%.

When cross-referring figure 1 and figure 2, it is apparent country parks/parks/forests held a higher percentage of the share of visits (40 percent) in contrast to the actual proportion of attractions in the sample (16 percent).

Figure 2: Visitors by attraction category, 2011.



When cross-referring table 2 and table 3, it can be seen that local authorities owned and had the largest proportions of visitors during 2011 (31 and 35 percent respectively). Privately owned attractions, accounted for 6% of attractions and reported 7% of all visits in 2011.

Table 3: Number of visits by ownership, 2011

	Number of visitors (000s)	Percentage (%)
Local Authority	4,303	35
Government Department/Agency	3,115	25
National Trust	1,147	9
Other Trust/charity	1,051	8
Private	900	7
Other	1,871	15
Total (140)	12,386	100

*percentage might not sum to 100 due to rounding

Top Attractions

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Table 4 presents the top ten participating visitor attractions (excluding country parks/parks/forests and gardens) with corresponding visitor numbers and annual percentage change on the level in 2010.

Table 4: Top 10 participating visitor attractions 2011 (excluding country parks/parks/forests/gardens)

	Attraction	Visitor Numbers 2010 (000s)	Visitor numbers 2011 (000s)	% change
1	Dunonald Ice Bowl	618	601	-3
2	Giant's Causeway Visitor Centre	579	533	-8
3	Ulster Museum	542	471	-13
4	Peace Bridge #		336	
5	Belfast Zoo	298	283	-5
6	Derry Walls	248	278	12
7	W5	236	251	6
8	Newry Cathedral	250	250	0
9	Carrick-A-Rede Rope Bridge	238	243	2
10	Ulster Folk & Transport Museum	167	201	20

Opened for the first time in June 2011

Table 5 provides the number of visitors to the top ten participating country/forest parks and gardens throughout Northern Ireland.

Table 5: Top 10 participating Country Parks/Parks/Gardens, 2011

	Country Parks/Gardens	Visitor Numbers 2010 (000s)	Visitor numbers 2011 (000s)	% change
1	The Lagan Towpath	67	1,081	1,513
2	Crawfordsburn Country Park	750	770	3
3	Lurgan Park	750	750	0
4	Botanic Gardens	679	650	-4
5	Lagan Valley Regional Park	670	500	-25
6	Roe Valley Country Park	300	280	-7
7	Delamont Country Park	217	231	7
8	Carnfunnock Country Park	246	228	-7
9	Scrabo Country Park	233	200	-14
10	Dungannon Park	120	125	4

It should be noted that respondents were given the opportunity to remain confidential and therefore any such attractions have been excluded from Tables 4 and 5.

Visitor Profile

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Respondents to the Visitor Attraction survey were asked to provide a breakdown of the country of residence of their visitors. Of those who did provide a breakdown (107), it was reported that Northern Ireland residents made approximately 76% of all visits. Of the 24% out-of-state visitors, there were approximately the same proportion from the Republic of Ireland, United Kingdom and the Rest of the World (7%, 8% and 9% respectively).

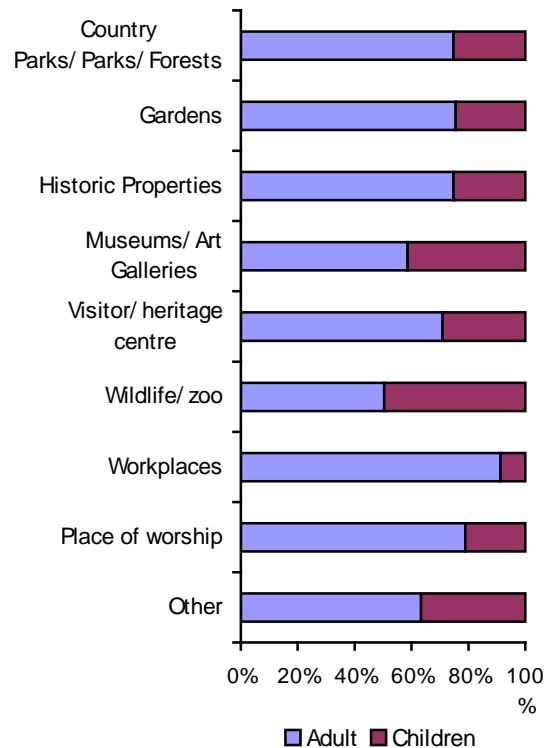
The proportion of out-of-state visitors by type of attraction are given in table 6.

Table 6: Proportion of out-of-state visitors to responding attractions, 2011

Attraction Category	Estimated proportion of out-of-state visitors (%)
Country Parks / Parks/ Forests	14
Gardens	17
Historic Properties	50
Museums/Art Galleries	30
Visitor/Heritage Centres	48
Wildlife/Zoo/Nature Reserve	16
Workplaces	40
Places of worship	14
Other	30
All responding attractions (N=107)	24

Figure 3 illustrates the proportion of adult to child visitors during 2011 broken down by attraction category. The average overall ratio for responding attractions (115) in 2011 was 71 percent adults to 29 percent children.

Figure 3: Adult/Child Ratios of responding attractions, 2011

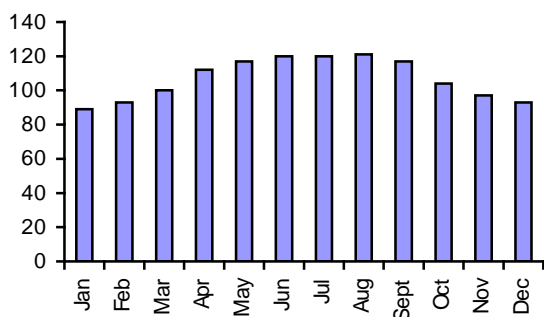


Seasonality



The number of responding visitor attractions that indicated they were open (partially or fully) each month of 2011 varied slightly over the year with the lowest number open in January (89) and the highest number in August (121). Figure 4 shows the number of attractions open by month throughout the year.

Figure 4: Number of open attractions, 2011



The seasonal distribution of visits to the responding attractions is broadly similar for the different types of attraction categories. All attractions achieved the majority of their visitors between April and September, peaking in August (1.3 million).

Figure 5 shows the number of visitors to the different types of responding open attractions over the year.

Figure 5: Number of visitors to attractions (000s), 2011

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Revenue and Employment

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In 2011, 113 of the participating attractions (81%) provided figures on how many visitors paid to visit the attraction.

Table 7 shows the admission charges for responding attractions for 2010 and 2011.

Table 7: Admission charges to charging attractions 2010 and 2011

Price of admission	Adult		Child	
	2010	2011	2010	2011
Maximum	£8.5	£11.2	£7.0	£5.7
Minimum	£1.0	£2.0	£0.0	£1.5
Mean	£4.6	£5.3	£2.8	£3.5

In addition to the revenue generated from admissions, revenue was generated from donations, catering, retail and other means. The number of visitor attractions who provided the breakdown of revenue generated by each of these categories was too small to report.

Attractions were asked if their gross revenue had changed over the year, of the 88 who provided an answer, 31% reported an increase, 28% reported a decrease and 41% reported no change.

In 2011, 35 responding attractions indicated that they had upgraded or made improvements to their attraction. The median spend was £90,000 with attractions spending from under £10,000 to over £1 million.

A total of 115 responding attractions were able to provide a staff breakdown in 2011. Table 8 illustrates the numbers of staff employed in attractions by type of employment, based on the information from these attractions.

Table 8: Employment at responding Visitor Attractions 2011

Price of admission	% of all employees
Full-time permanent	37
Part-time permanent	15
Full-time seasonal	5
Part-time seasonal	22
Unpaid volunteers	22

*percentage might not sum to 100 due to rounding

Methodology

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Three hundred and eighty attractions across Northern Ireland were invited to participate in the 2011 survey by means of a self-completion survey. The list was gained through the Northern Ireland Tourist Board (NITB) from Discover Northern Ireland.

In 2011 there was a 42% response rate, with 140 attractions providing visitor numbers. A further 20 attractions responded indicating that they were closed; that their numbers were included within another attraction; or they were unable to provide visitor numbers to the attraction element of their business.

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

A complete list of all participating attractions, excluding those attractions 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 the 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 purposes of analysis, the attractions have been classified by types (e.g. country parks/parks/forests, gardens, historic properties, museums/art galleries, visitor/heritage centre, 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:

In the appendix visitor numbers are recorded in the columns ‘2007’, ‘2008’, ‘2009’, ‘2010’ and ‘2011’. Data may not be available for certain years, where possible ‘not open’ has been used to indicate that the attraction had not yet opened to the public, ‘closed’ has been used to indicate that the attraction was temporarily closed. However, if the cell has been left empty it could be for any of the above reasons or perhaps the form had not been returned.

It should be noted that some attractions have changed their method of counting visitors over the years, so this may explain the differences year on year.

Data for years 2007-2009 are sourced to Northern Ireland Tourist Board.

Further Information

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For further information, please contact:

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http://www.detini.gov.uk/deti-stats-index/tourism-statistics/visitor_attraction_survey-2.htm

Appendix – Visitor Attraction tables for returned 2011 forms (excluding those wishing to remain confidential)

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Table 9: Visitor Numbers for Country Parks/Parks/Forests

Owner	Attraction	2007	2008	2009	2010	2011	% Difference 10/11
G	Castle Archdale Country Park	160,000	175,000	187,000	184,000	180,000	-2
LA	Carnfunnock Country Park	206,433	187,408	211,143	246,241	228,213	-7
G	Castlewellan Forest Park					122,590	
LA	Cavehill Country Park				100,000	110,000	10
G	Crawfordsburn Country Park	760,000	800,000	950,000	750,000	770,000	3
OTC	Creagan Country Park				15,000	15,000	0
G	Davagh Forest				5,000	5,000	0
LA	Delamont Country Park	227,384	189,937	203,608	216,195	230,866	7
G	Derrynoyd Forest				20,000	20,000	0
LA	Dungannon Park & Lake	60,000	59,994	85,000	120,000	125,000	4
G	Glenariff Forest Park					36,237	
G	Glenshane Forest				1,000	1,000	0
G	Lagan Valley Regional Park	500,000	500,000	600,000	670,000	500,000	-25
G	Learmount Wood				8,000	8,000	0
G	Moydamlaght Forest				4,000	4,000	0
G	Roe Valley Country Park			300,000	300,000	280,000	-7
G	Scrabo Country Park	235,000	230,000	229,500	233,000	200,000	-14
O	The Lagan Towpath				67,000	1,080,520	1513

Table 10: Visitor Numbers for Workplaces

Owner	Attraction	2007	2008	2009	2010	2011	% Difference 10/11
P	Avalon Guitar Factory	300	150	95	180	165	-8
P	Fergusons Irish Linen Centre	1,363	1,965	2,164	1,999	1,844	-8
P	The Steensons Jewellery Workshop					4,860	

Table 11: Visitor Numbers for Historic Properties

Owner	Attraction	2007	2008	2009	2010	2011	% Difference 10/11
P	Ballywalter Park	30,000	31,700	29,250	14,225	22,750	60
LA	Belfast City Hall			0	72,418	68,302	-6
P	Benvarden Estate	4,572	4,148	3,835	4,600	4,200	-9
G	Carrickfergus Castle	54,683	63,283	71,961	69,792	67,501	-3
NT	Castle Ward House & Demesne	62,301	57,336	80,000	103,322	126,006	22
LA	Cave Hill Visitor Centre (including Belfast Castle)	45,000	51,500	105,000	90,000	87,000	-3
LA	Cockle Row Cottages	9,156	10,647	11,365	11,739	11,366	-3
O	Derry Walls	213,415	215,015	225,765	248,340	278,141	12
G	Devenish Island Monastic Site	26,600	27,000	30,000	35,000	45,000	29
G	Dunluce Castle	74,003	76,721	80,890	73,636	59,388	-19
NT	Florencecourt House & Gardens	30,664	30,000	32,813	38,505	40,314	5
P	Free Derry Tours				10,455	11,300	8
G	Greencastle Royal Castle		1,412	2,730	3,689	3,474	-6
LA	Guildhall				34,823	38,000	9
P	Leslie Hill Open Farm				10,344	10,359	0
LA	Malone House	75,000		76,000	80,000	75,000	-6
NT	Mount Stewart House and Gardens	128,000	133,452	122,884	150,000	150,517	0
G	Scrabo Tower				18,114	14,786	-18
P	Shanes Castle				45,000	40,000	-11
G	The Wilson Ancestral Home					105	

Table 12: Visitor Numbers for Worship

Owner	Attraction	2007	2008	2009	2010	2011	% Difference 10/11
O	Belfast Cathedral / St. Annes Cathedral				40,159	42,593	6
O	First Derry Presbyterian Church					2,000	
P	Newry Cathedral				250,000	250,000	0
OTC	St. Augustines Church				12,500	18,000	44

Table 13: Visitor Numbers for Museums/Art Galleries

Owner	Attraction	2007	2008	2009	2010	2011	% Difference 10/11
LA	Andrew Jackson Centre & US Ranger's Centre	1,044	725	705	1,042	1,153	11
P	Apprentice Boys Memorial Hall	7,700	12,000	19,500	14,000	9,000	-36
G	Armagh County Museum	12,790	10,539	12,229	15,336	12,772	-17
P	Armagh Planetarium	38,924	37,818	42,565	34,872	35,700	2
LA	Ballycastle Museum	2,865	2,820	2,865	2,510	2,678	7
LA	Ballymoney Museum	6,271	4,705	14,023	13,150	11,212	-15
LA	Carrickfergus Museum	27,991	26,909	23,883	776	1,153	49
O	Downpatrick & County Down Railway				9,089	7,245	-20
LA	FE McWilliam Gallery/Studio (inc TIC)			17,046	41,887	43,069	3
LA	Green Lane Museum				6,874	5,003	-27
LA	Larne Museum	1,847	3,000	4,500	4,929	5,063	3
O	Lawrence Street Workshops				1,500	1,800	20
LA	Mid-Antrim Museum	5,873	22,349	25,248	28,602	29,348	3
O	Millennium Court Arts Centre				12,114	12,072	0
OTC	Museum of Free Derry	14,301	15,138	15,447	17,148	16,760	-2
LA	Newry & Mourne Museum	28,554	41,933	37,610	34,323	36,646	7
LA	North Down Muesum	47,117	44,908	54,723	54,257	59,378	9
OTC	Northern Ireland War Memorial aka War Memorial Gallery				2,829	2,907	3
G	Police Museum				2,667	2,412	-10
G	Royal Irish Fusiliers Museum	8,813	9,269	10,759	10,979	10,218	-7
OTC	Royal Irish Regiment Museum				2,500	5,000	100
O	The Higher Bridges Gallery					3,075	
LA	Tower Museum	27,527	25,536	23,860	24,802	23,000	-7
O	Ulster American Folk Park	157,325	152,717	154,471	145,548	138,418	-5
G	Ulster Folk & Transport Museum	168,866	190,580	169,628	167,105	201,138	20
G	Ulster Museum			152,380	542,171	471,451	-13
LA	Workhouse Museum				4,125	3,976	-4

Table 14: Visitor Numbers for Gardens

Owner	Attraction	2007	2008	2009	2010	2011	% Difference 10/11
P	Ballyrobert Cottage Garden & Nursery	4,000	4,140	4,100	4,500	4,500	0
LA	Botanic Gardens	660,000	660,000	700,000	679,000	650,000	-4
G	Greenmount			3,643	3,500	3,515	0
P	Hampstead Hall Garden				830	60	-93
LA	Joey and Robert Dunlop Memorial Garden	76,500	80,000	80,000	12,000	12,000	0

Table 15: Visitor Numbers for Visitor/Heritage Centres

Owner	Attraction	2007	2008	2009	2010	2011	% Difference 10/11
O	An Creagan Visitor Centre	22,500	24,050	23,000	22,500	26,450	18
LA	Armagh Ancestry	600	670	686	720	700	-3
G	Bellaghy Bawn	6,795	6,450	3,252	2,240	500	-78
P	Belleek Pottery	171,569	148,225	152,573	161,196	165,297	3
O	Bushmills Distillery					110,000	
NT	Carrick-a-Rede Rope Bridge	222,613	241,291	241,856	238,227	242,919	2
OTC	Culturlann Mac Adam	60,000	76,900	65,000	75,600	89,000	18
LA	Dunluce Centre	58,560	57,660	58,700	60,000	58,000	-3
LA	Giant's Causeway Visitor Centre	712,714	751,693	714,612	579,180	533,448	-8
LA	Lough Neagh Discovery Centre	58,533	79,455	78,263	78,777	93,105	18
NT	Patterson's Spade Mill	3,182	2,633	3,299	3,315	2,172	-34
LA	Portaferry Tourist Information & Visitor centre	9,678	6,631	9,066	6,583	6,791	3
G	Portrush Coastal Zone	40,000	40,000	73,491	36,445	44,705	23
LA	Rathlin Island Boathouse Visitor's Centre				16,292	13,892	-15
LA	The Navan Centre				45,000	45,000	0
OTC	The Saint Patrick Centre	143,363	117,079	120,755	89,000	89,483	1
LA	Tower House and Tourist Information Centre				28,302	26,841	-5

Table 16: Visitor Numbers for Wildlife, Zoo and Nature Reserves

Owner	Attraction	2007	2008	2009	2010	2011	% Difference 10/11
LA	Belfast Zoological Gardens	294,935	275,494	304,085	297,680	282,857	-5
OTC	Castle Espie Wildfowl & Wetlands Trust	63,000	56,050	55,146	64,397	56,565	-12
LA	Exploris Aquarium		94,674	123,100	106,600	96,500	-9
OTC	Portmore Lough Nature Reserve					4,560	
P	Watertop open farm				10,000	10,000	0
P	World of Owls				4,745	4,565	-4

Table 17: Visitor Numbers for 'Other'

Owner	Attraction	2007	2008	2009	2010	2011	% Difference 10/11
O	Armagh Observatory & Astro Park	45,500	44,500	54,600	73,500	42,000	-43
P	Clementsmonth Fun Farm	7,433	8,000	8,999	12,387	14,897	20
LA	Dundonald Ice Bowl			630,000	617,568	601,347	-3
LA	Flowerfield Arts Centre				40,000	40,000	0
P	Funny Farm Maize Maze	6,145	5,260	6,326	6,572	8,521	30
G	Peace Bridge					333,598	
O	Peatlands Park	89,000	88,000	90,000	95,000	95,000	
G	Public Record Office	15,811	16,512	16,711	8,243	10,698	30
P	Rathlin Island				89,085	82,788	-7
O	St. Patricks Well & Magherakeel Monastic site				316	330	4
OTC	W5	247,506	282,756	251,268	235,524	250,634	6