NISRA
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Statistics and Research Agency
Gníomhaireacht Thuaisceart Éireann
um Staitisticí agus Taighde

Northern Ireland Annual Visitor Attraction Survey 2019

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The key points are:

- The top three responding attractions (excl. parks & gardens) during 2019 were Giant's Causeway, Titanic Belfast and Dundonald International Ice Bowl;

- there were a reported 16.5 million visits to visitor attractions in 2019 by respondents to the survey;

- A reported 38% of visits were made by visitors who lived outside of Northern Ireland; and

- Country Parks/Parks/Forests accounted 42% of all visitors reported in 2019.

Contents:

Introduction

This report is designed to give an overview of the performance of the Visitor Attraction market in Northern Ireland in 2019. Participation by attractions in the Visitor Attraction Survey is voluntary. The survey was issued to 423 attractions (details obtained from Discover Northern Ireland) and 142 attraction owners replied; of these 135 provided data for analysis. Unless otherwise stated, the statistics presented in this report refers to these 135 attractions. It is important to note that response rates fell significantly (around 50%) most likely due to the Covid-19 crisis.

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.

This report should be read in conjunction with other tourism statistics reports for a full picture. When looking at the full picture, sources point toward a general upward trend in visits to NI visitor attractions since 2013, however, we cannot say that this is a statistically significant change. A full picture of all tourism activity can be found in the Northern Ireland Annual Tourism Statistics Publication

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What you can say....

Looking at the full picture sources point to a general upward trend since 2013 of the number of visitors to attractions, based on those who participated in the survey.

What you cannot say....

In 2019 there was a definite increase in the overall number of visits to all NI attractions, rising 3% from 2018.

Types of attractions
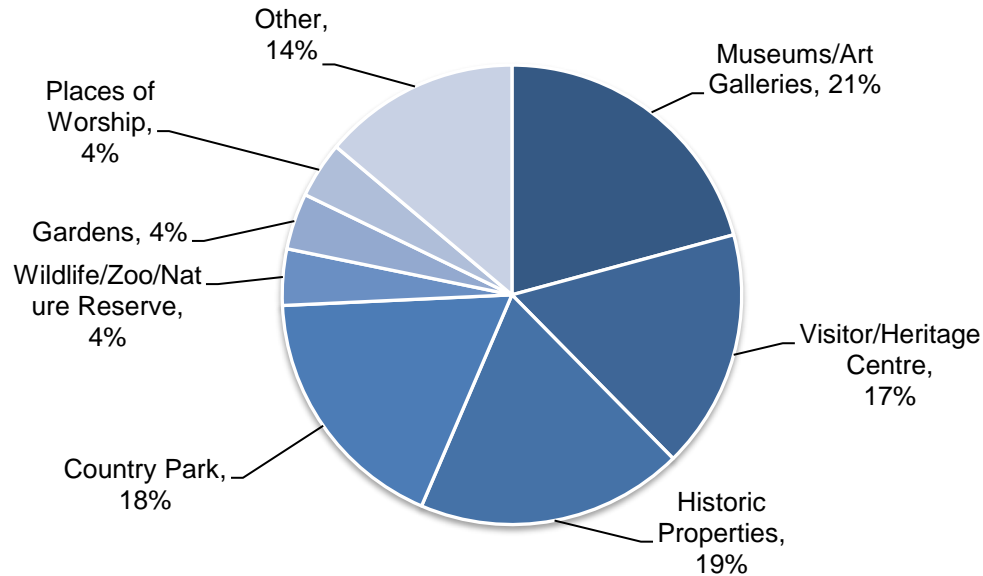
Figure 1: Percentage of attractions by attraction category

Other, 14%
Museums/Art Galleries, 21%
Places of Worship, 4%
Gardens, 4%
Wildlife/Zoo/Nature Reserve, 4%
Visitor/Heritage Centre, 17%
Country Park, 18%
Historic Properties, 19%

Figure 2: Percentage of visits by attraction category

Places of Worship, 1%
Other, 14%
Gardens, 2%
Wildlife/Zoo/Nature Reserve, 3%
Country Park, 42%
Historic Properties, 8%
Museums/Art Galleries, 11%
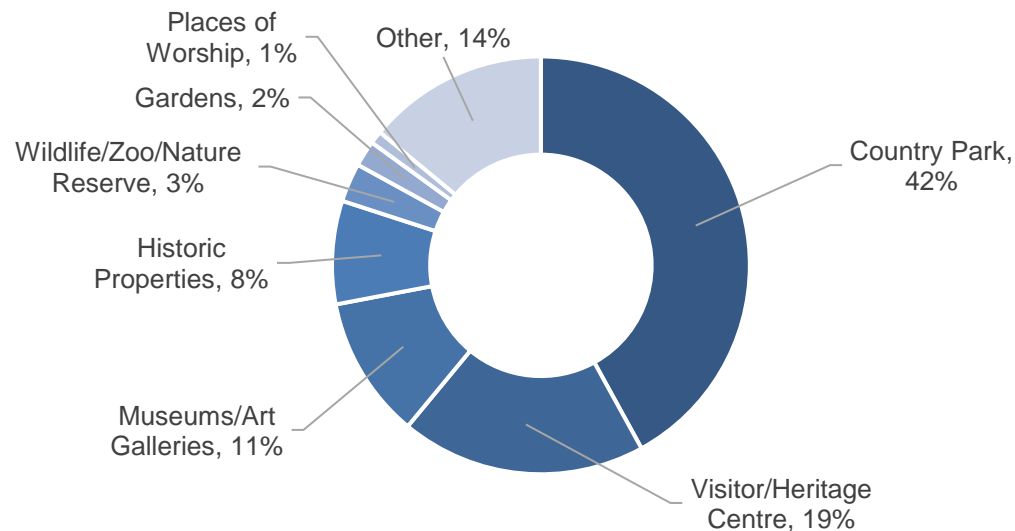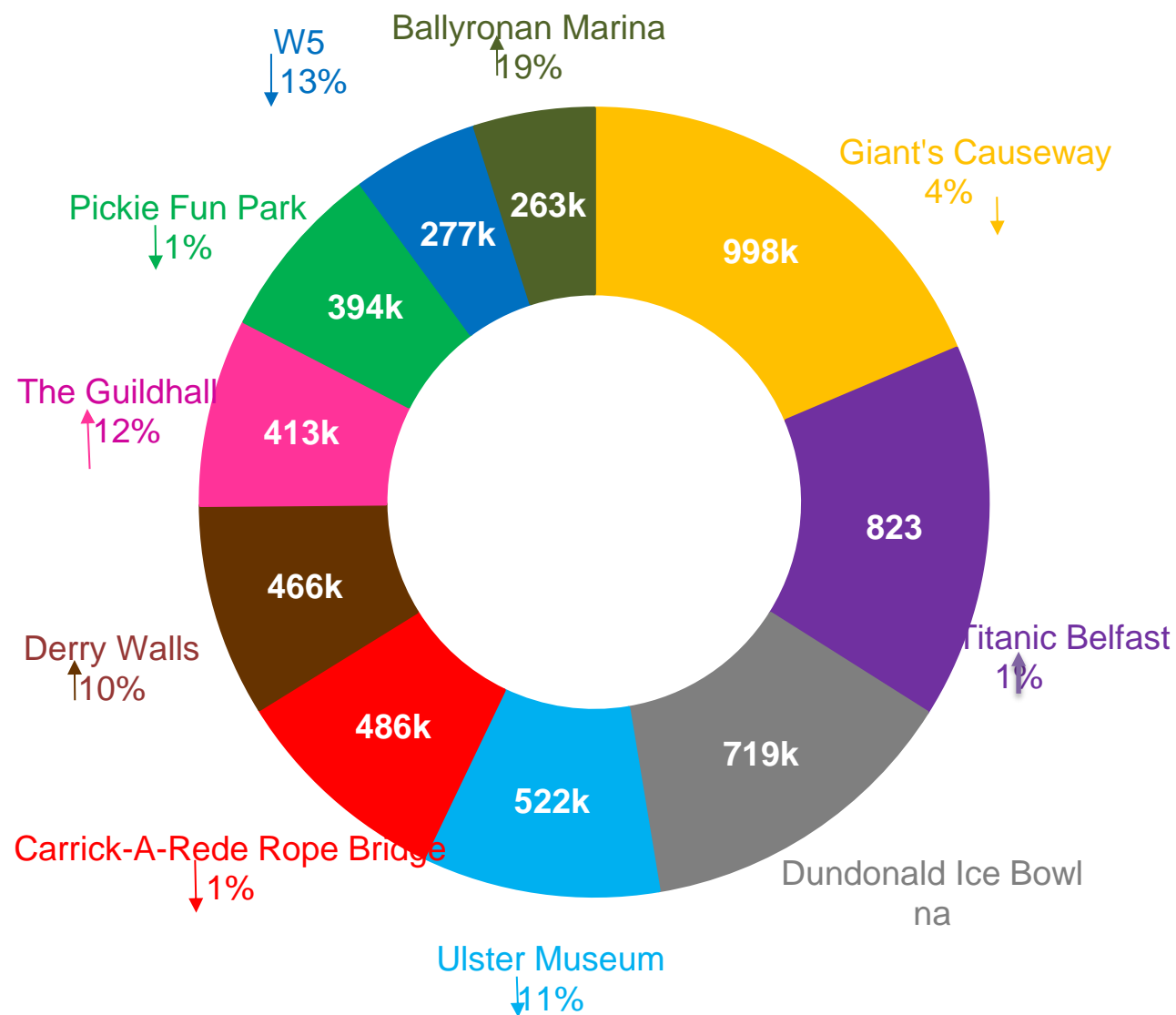Visitor/Heritage Centre, 19%

Figure 1 shows the proportion of responding attractions in each category. In 2019, the largest proportion of the 165 responding attractions were Museums/Art Galleries (21%) followed by Historic Properties (19%), and Country Park (18%).

During 2019 a reported 16.5 million visits were made to participating attractions. Country parks /parks /forests attracted the largest proportion of visitors (42%). Visitor/heritage centres attracted the second highest proportion of visitors during 2019 (19%). (Figure 2)

In total 155 participants returned data with figures for both 2018 and 2019. Based on the estimates provided, figures would suggest an estimated increase of 3% in the number of visits to attractions from 2018 to 2019.

*Workplaces do not appear in Figures 1 & 2 as they accounted for less than 1% of visits to attractions in 2019.

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Full information on Northern Ireland visitor attraction statistics can be found at the following link: NI Visitor Attraction Statistics

Figure 3: Top ten visitor attractions 2019 (excluding country parks/parks/ forests/gardens)

W5 ↓13%
Ballyronan Marina ↑19%
Pickie Fun Park ↓1%
The Guildhall ↑12%
Derry Walls ↑10%
Carrick-A-Rede Rope Bridge ↓1%
Ulster Museum ↓11%
Dundonald Ice Bowl na
Titanic Belfast ↑1%
Giant's Causeway ↓4%

277k
263k
394k
413k
998k
466k
823
486k
719k
522k

Excluding country parks/parks/forests and gardens, there were a reported 9.3 million visits to attractions in Northern Ireland during 2019.
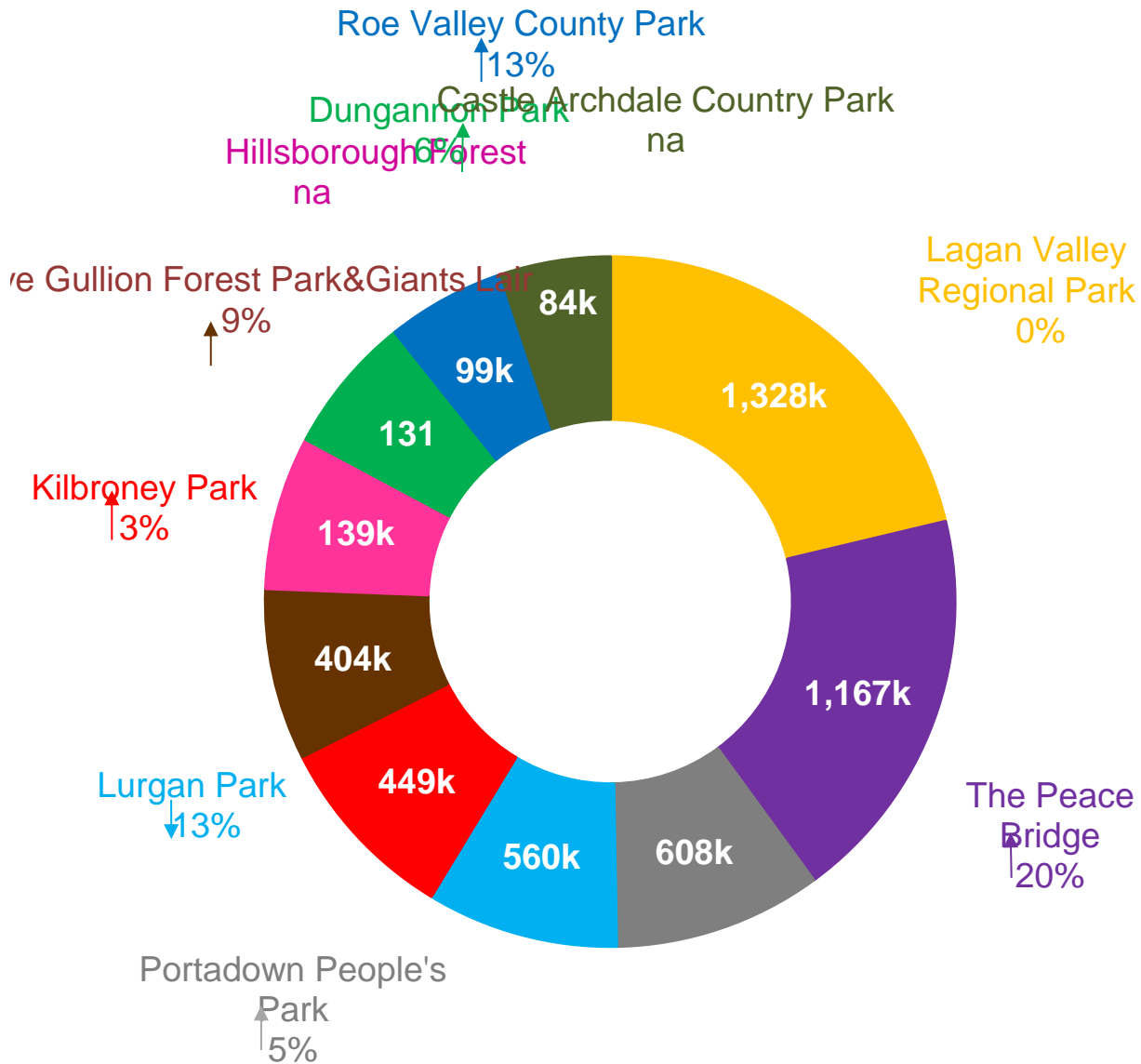
Within this group the Giant's Causeway World Heritage Site attracted the highest number of visits (1 million).

Titanic Belfast attracted the second highest number (0.8 million visits).

In total the top ten attractions had a reported 5.4 million visits in 2019 accounting for 32% of the total visits to all attractions during 2019.

*Arrow indicates increase/decrease between 2018 and 2019

Figure 4: Top ten country parks/parks/forests/gardens 2019

Roe Valley County Park ↑13%

Castle Archdale Country Park na

Dungannon Park ↑6%

Hillsborough Forest na

Slieve Gullion Forest Park&Giants Lair ↑9%

Kilbroney Park ↓3%

Lurgan Park ↓13%

Portadown People's Park ↑5%

Lagan Valley Regional Park 0%

The Peace Bridge ↓20%

1,328k
1,167k
608k
560k
449k
404k
139k
131
99k
84k

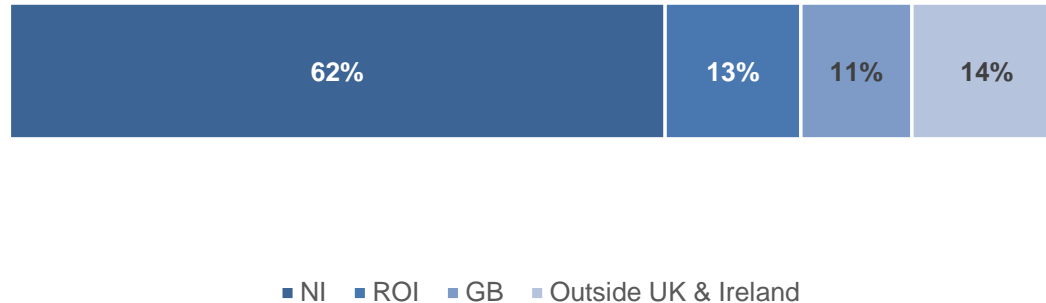*Arrow indicates increase/decrease between 2018 and 2019

During 2019 a reported 7.2 million visits were made to Northern Ireland country parks, parks, forests and gardens. Visits to the top ten country parks/parks/forests and gardens accounted for a reported 6.2 million.

Lagan Valley Regional Park attracted the highest number of visitors. A reported 1.3 million visitors visited the park during 2019.

The Peace Bridge, attracted the second highest number of visitors with a reported 1.2 million visits during 2019.
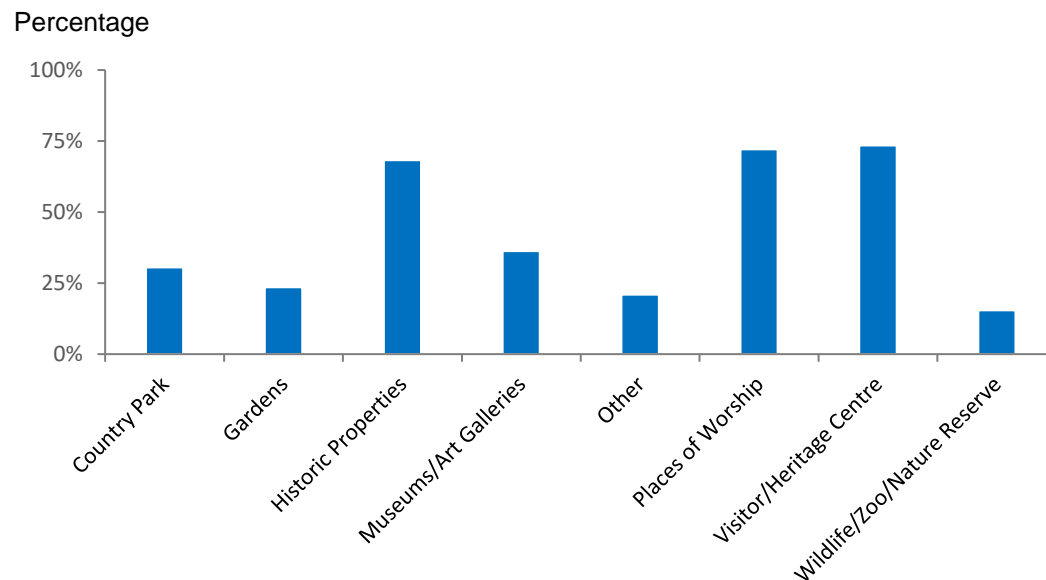
Full information on Northern Ireland visitor attraction statistics can be found at the following link: NI Visitor Attraction Statistics

Residency of visitors

Figure 5: Proportion of attraction visitors by place of residence 2019

| 62% | 13% | 11% | 14% |

■ NI ■ ROI ■ GB ■ Outside UK & Ireland

Figure 6: Proportion of visitors external to NI by attraction type 2019

Percentage

Respondents to the survey were also asked to provide information on the country of residence of their visitors. Based on respondents who replied, a reported 62% of visits were made by residents of Northern Ireland.

Therefore, 38% of all visitors were external to NI. This includes 13% of all visitors who were from the Republic of Ireland, 11% who were from Great Britain and 14% who were 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 (73%) followed by Places of Worship (72%). This points towards visitors external to NI being drawn towards the larger visitor attractions such as Giant's Causeway in the Visitor/Heritage Centre category.

Full information on Northern Ireland visitor attraction statistics can be found at the following link: NI Visitor Attraction Statistics

Seasonality

Figure 7: Number of visits to attractions by month 2019 (thousands)
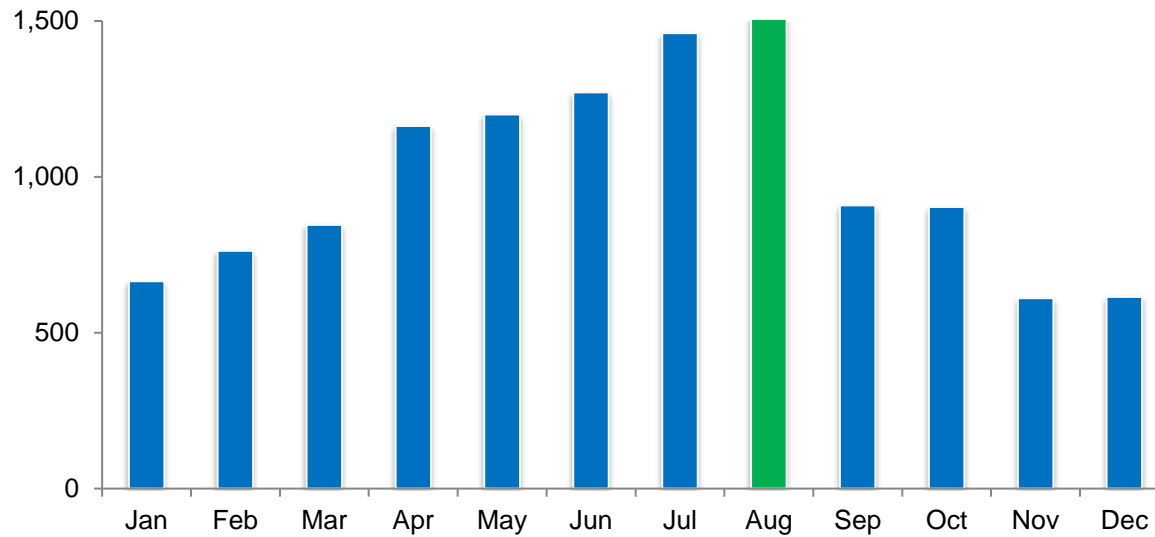
According to the responding attractions, August was the most popular month, with 1.5 million visits reported. The least popular month was November with a reported 0.6 million visits made during the month.
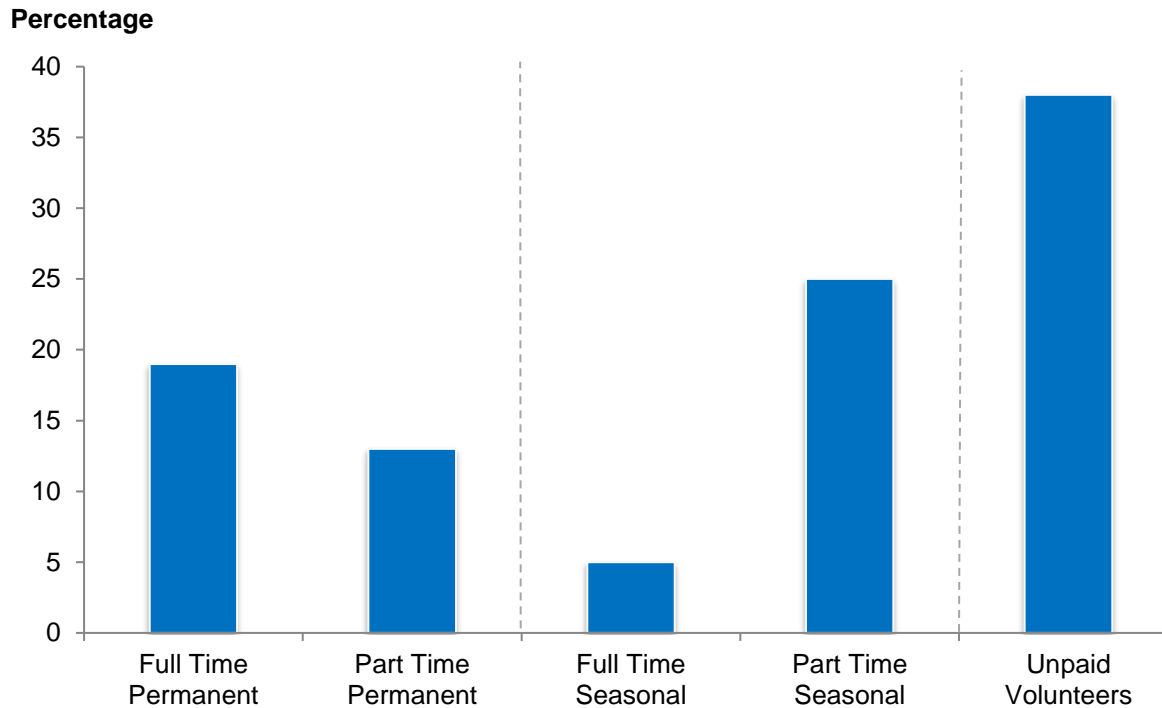
Figure 8: Seasonality of attraction opening 2019
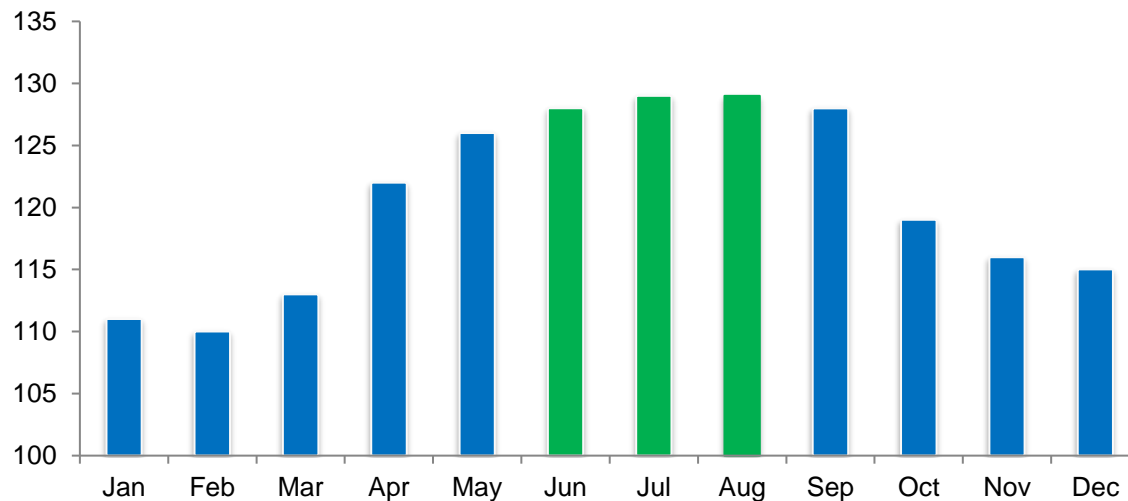
In total 129 respondents supplied information on the months attractions were open (partially or fully). The number reported as being open (partially or fully) each month during 2019 varied slightly over the year with the highest number of attractions being open in the summer months July/August (129) and the lowest number being open in the month of February (110).

Full information on Northern Ireland visitor attraction statistics can be found at the following link: NI Visitor Attraction Statistics

Employment

Figure 9: Employment type 2019

Percentage

A total of 118 attractions provided information on employment totalling 3,342 employees and volunteers in 2019. Around 19% of staff were employed on a full time permanent basis.

Admission charges

Of the 46 attractions responding with information on admission charges in 2019 the highest admission charge per adult was £25.00 whilst the highest admission charge for a child was £30.00. The lowest admission charge reported per adult was £2.40 while the lowest per child was £1.00.

Revenue

Of the 100 respondents who supplied information on revenue, 15% reported revenue in 2019 had increased when compared to 2018. Almost two thirds (59%) reported similar revenue to the previous year, while 26% reported that revenue was down.

Upgrades

A total of 37 attractions indicated they had upgraded or made improvements to their attraction in 2019. The median spend on upgrades was £35,000 with attractions spending from under £3,000 to over £1.2 million.

Adult child ratios

The average overall ratio of adult to child visitors during 2019 for responding attractions (103) was 66% adult to 34% children.

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Background notes

In total 423 attractions across Northern Ireland were invited to participate in the 2019 Visitor Attraction Survey by means of a self-completion questionnaire. The list of attractions was obtained from Tourism Northern Ireland (TNI).

In 2019 there was a 31% response rate with 135 respondents providing visitor numbers. A total of 7 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. It is important to note that response rates fell significantly (around 50%) most likely due to the Covid-19 crisis.

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.

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 'external to NI' 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.

Visitor figures:

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 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 2019 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

This report was republished in August 2021 to take account of late returns included in the LGD report.

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@nisra.gov.uk

More information on the data quality of tourism statistics can be found at Data Quality Report.

Information on the quality of administrative sources can be found at Data Quality Administrative Sources.

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