

## North East Visits to Attractions 2010

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## **1.0 Executive Summary**

60% of attractions in North East England saw a drop in visitor numbers in 2010 with a total of 8.5 million visitors passing through their doors. The weather and economic climate both had an impact on the performance of attractions in the last 12 months. However, 30% of establishments in the region did see growth, many of these being smaller establishments or those with a varied events programme or offer led entry such as Beamish.

More than 4 million visitors passed through the doors of the regions museums and art galleries, the only category group to see growth, up by 1%.

Interestingly the top ten attractions were fairly evenly split between free and paid establishments however 8 of the top ten seeing the largest growth in visitors were free admission. 7 of the top ten attractions were from Tyne and Wear despite visitor numbers to the county's attractions as a whole falling by 3%. Tees Valley saw the biggest overall growth, up by 6%.

## 2. Introduction

97 attractions responded to the regional attractions survey, some on a monthly basis, some quarterly and some with annual responses only. This report provides an analysis of the visitor numbers to attractions in 2010 with comparisons to 2009 as well as breakdowns by sub region, type and admission charge.

### 2.1 Overall Attraction Totals

More than 8.5 million people passed through the doors of visitor attractions in North East England in 2010, however 60% saw a fall in visitor numbers when compared to the previous year. Only 30% of the regions attractions saw visitor numbers grow.

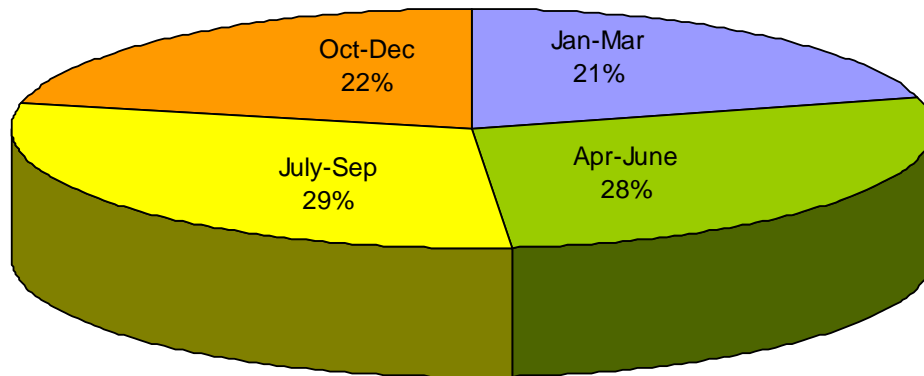


Figure 1. Visitor Breakdown by Quarter

In terms of the fall in visitor numbers there are a number of factors which may have played a part, these include:

1. The weather: 2010 saw periods of extreme winter weather at both the beginning and end of the year which led to many rural areas being inaccessible and consumers deciding or being advised not to travel.
2. The economic climate: With a sharp increase in fuel costs as well as increasing financial pressure generally consumers are reconsidering their days out perhaps taking fewer, staying closer to home or taking walks rather than visiting built attractions. The fact that consumers are also shortening their overnight trips is also playing a part as with a fall in the average length of stay consumers are able to visit fewer attractions while on holiday.
3. Staycation burnout: 2009 saw many attractions seeing high levels of visitors as people holidayed at home and visited local attractions. 2010 may have seen some levelling out of this with consumers unwilling to revisit attractions that have not refreshed exhibitions or hosted new events to encourage people to return.

As can be seen from table 1 overleaf, there is a fairly even split in the top ten of free and paid attractions. 3 of the top ten in terms of numbers saw an increase in visitors however if we look at table 2 we can see that some of the regions smaller attractions have seen the largest levels of growth. Interestingly 8 of the attractions seeing the largest levels of growth were free admission.

<b>Attraction</b>	<b>Numbers</b>	<b>free/paid</b>	<b>% change</b>
Sage Gateshead	600,000E	Paid	0
Durham Cathedral	600,000E	Free	0
Great North Museum: Hancock	520,960	Free	-19
Discovery Museum	420,837	Free	-6
Beamish	417,592	Paid	8
BALTIC	357,758	Free	1
The Alnwick Garden	337,262	Paid	-31
Sunderland Museum and Winter Gardens	339,091	Free	-1
Laing Art Gallery	280,434	Free	11
Empire Theatre, Sunderland	260,668	Paid	-18

Table 1: Top Ten Attractions, Visitor Numbers

As we can see from table 2 below, 8 of the attractions who have seen the most significant growth on the previous year are free admission. This can be seen as a reflection of the economic climate with people looking for low cost alternative days out. Proactive work on the part of the businesses also helps to increase visitor numbers with new exhibitions and events designed to attract visitors. The most significant growth was seen by Whalton Manor Gardens, up by 195% while visitor numbers to Shipley Art Gallery more than doubled.

<b>Attraction</b>	<b>Numbers</b>	<b>free/paid</b>	<b>% change</b>
Whalton Manor Gardens, Morpeth	1800	Paid	195
Shipley Art Gallery, Gateshead	88,553	Free	109
National Park Centre, Ingram	57,692	Free	82
Biscuit Factory	53,212	Free	39
St. Peters Church, Sunderland	3,123	Free	34
Baillifgate Museum	5,818	Paid	33
Segedunnum Roman Fort and Baths	53,284	Free	33
Dorman Museum, Middlesbrough	108,433	Free	27
Hartlepool Art Gallery	71,458	Free	27
Locomotion, Shildon	194,097	Free	25

Table 2: Top Ten Attractions, growth in visitor numbers

### 3.0 Sub Regional Breakdowns

If we look at figure 3 below we can see that Tees Valley (6%) had the highest levels of overall growth in visitor numbers when compared to 2009. There was a split across the sub regions with Durham also seeing visitor numbers increase while Northumberland saw a fall of 11% and Tyne and Wear saw levels decline by 3%.

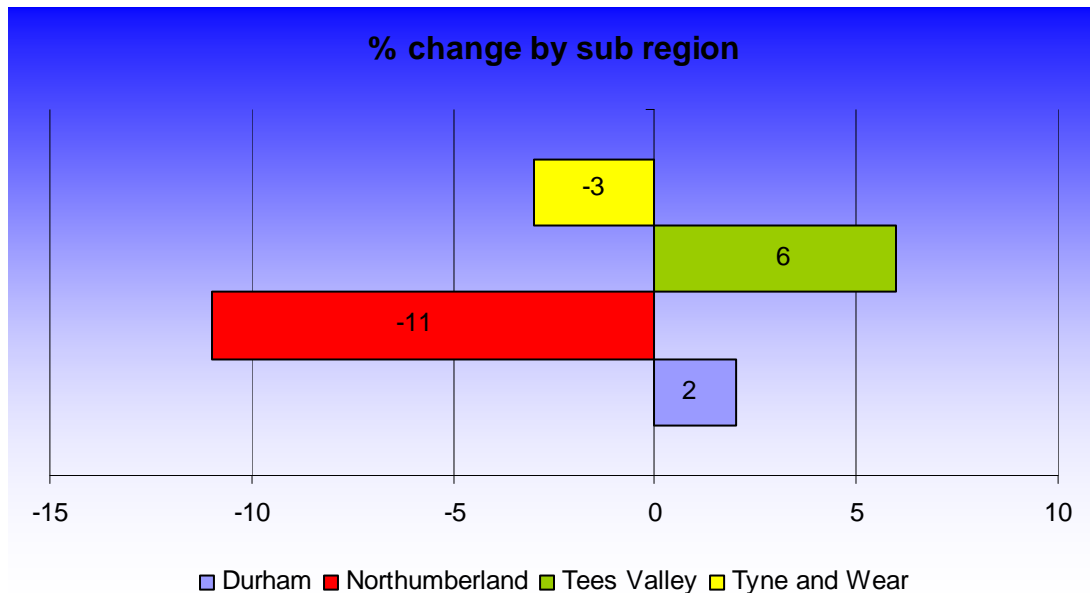


Figure 3: % change compared to 2009

### 3.1 Tyne and Wear

More than 4 million people passed through the doors of attractions in Tyne and Wear in 2010 with the Sage Gateshead being the most visited attraction. Visitor levels to the Sage remained constant with the levels of 2009 while half of the top ten attractions saw visitor numbers fall. After its highly successful first year the Great North Museum saw visitor numbers fall by 20% while the Empire Theatre and National Glass Centre also saw a significant drop in visitors. In comparison South Shields Museum and Art Gallery had the largest growth in visitors, up by 19% while Laing Art Gallery saw an increase of 11%. The greatest growth in Tyne and Wear however was seen by the Shipley Art Gallery who saw visitor numbers double while the Biscuit Factory enjoyed an increase of 39%. Overall visitor numbers to Tyne and Wear attractions fell by 3%.<sup>1</sup>

<sup>1</sup> Only business that participated in both 2008 and 2009 are compared

Attraction	Visitor Numbers	Free/ paid	%
Sage Gateshead	600,000E	Paid	0
Great North Museum: Hancock	520,960	Free	-19
Discovery Museum	420,837	Free	-6
BALTIC	357,758	Free	1
Sunderland Museum and Winter Gardens	339,091	Free	-1
Laing Art Gallery	280,434	Free	11
Empire Theatre	260,668	Paid	-18
Life	214,031	Paid	8
South Shields Museum and Art Gallery	195,928	Free	19
National Glass Centre	158,058	Free	-13

Table 3: Tyne and Wear Top 10 attractions

### 3.2 Northumberland

The Alnwick Garden was the most visited attraction in Northumberland in 2010 with more than 300,000 visitors, also being the only Northumberland representative in the regional top ten. Despite being the most visited attraction Alnwick Garden saw visitor numbers fall by almost a third when compared to 2009. Attractions in Northumberland saw mixed levels of performance with an almost even split of attractions seeing performance up as saw performance fall. Visitor figures in Northumberland were on the whole down by 11% on 2009.<sup>2</sup>

Attraction	Visitor Numbers	Free/ paid	% change
The Alnwick Garden	337,262	Paid	-31
Alnwick Castle	192,929	Paid	-8
Wallington	191,083	Paid	-3
Cragside	181,051	Paid	-19
Bamburgh Castle	140,676	Free	-5
Kielder Forest	124,439	Paid	-12
Lindisfarne Castle	98,315	Free	-5
Housesteads Roman Fort	93,586	Paid	-10
Hexham Abbey	90,615	Free	
Woodhorn	84,609	Free	-13

Table 4: Top 10 most visited attractions in Northumberland

### 3.3 Tees Valley

MIMA retained its position as the most visited attraction in Tees Valley although it did see a fall in the number of visitors when compared to 2009. A number of attractions in the top ten have, however, seen significant growth with the Dorman Museum and Hartlepool Art Gallery seeing the highest levels of growth, up by 27%. 7 of the top ten attractions in Tees Valley are free admission.

Going against the trend, overall visitor numbers to attractions in Tees Valley grew by 6% with 2/3rds of comparable attractions welcoming more visitors. In total, attractions in Tees Valley welcomed more than 1million visitors in 2010.

<sup>2</sup> Only attractions responding to both 2008 and 2009 surveys were included

Attraction	Visitor Numbers	Free/paid	% change
MIMA	133,312	Free	-8
Captain Cook Birthplace Museum	120,933	Free	20
Museum of Hartlepool	114,978	Free	24
Dorman Museum	108,433	Free	27
Transporter Bridge	107,039	Free	-12
Middlesbrough Town Hall	101,855	Paid	
Saltholme	80,316	Free	-9
Hartlepool Art Gallery	71,458	Free	27
Middlesbrough Theatre	69,920	Paid	
Hartlepool Town Theatre	63,701	Paid	18

*Table 5: Top 10 most visited attractions in Tees Valley*

There were a number of leisure facilities in Tees Valley who returned their user numbers. The full list of leisure facilities can be found on page 9.

### 3.4 County Durham

Durham Cathedral was the most popular attraction in County Durham, welcoming an estimated 600,000 visitors. Beamish was the second most visited attraction welcoming more than 400,000 visitors, up by 8%. This is further proof of the success of both its event programme and the year pass offer.

Significant growth was seen both by Killhope (up 34%) and Locomotion (up 25%) with overall visitor numbers up by 2% across the county, despite 2/3rds of attractions seeing a fall in visitors. Overall County Durham saw visitor numbers increase by 2% standing at more than 900,000.

Attraction	Visitor Numbers	Free/paid	% change
Durham Cathedral	600,000E	Free	0
Beamish	417,592	Paid	8
Locomotion	194,097	Free	25
Hamsterley Forest	169,823	Free	-10
Durham Dales Centre	99,197	Free	-5
The Bowes Museum	79,528	Paid	-18
DLI Museum	39,969	Paid	-18
Regional Museum Store	31,384	Paid	
Oriental Museum	18,481	Paid	
Killhope	13,416	Paid	34

*Table 6: Top 10 most visited attractions in County Durham*

#### 4.0 Breakdown by Type

Looking at table 7 we can see that the most visited attraction types were Museum/art Gallery's and the regions entertainment venues. The regions museums attracted more than 4 million visitors with Great North Museum being responsible for more than 500,000 of this figure. As a defined category only the regions museums and art galleries saw visitor numbers grow, however this was only by 1%. The regions' gardens saw the largest decline in visitors, down by 26%. These comparisons only reflect those attractions that responded to the survey in both 2009 and 2010.

Individual visitor figures and percentage changes can be seen at <http://www.tourismnortheast.co.uk/site/research-and-statistics/tourism-performance/visits-to-attractions>

Category	Visitor Numbers	% change on 2009 <sup>3</sup>
Museum/Art Gallery	4,397,481	1
Entertainment Venue	967,193	-5
Castle/Fort	681,140	-3
Historic House	482,121	-8
Gardens	463,501	-26
Other	358,815	8
Forest	293,006	-14
Place of Worship	198,962	-3
Nature Reserve/Wetland	116,241	-13
Other Historic Property	14,029	-12
<b>Total</b>	<b>8,512,489</b>	

Table 7: Visitor numbers by category

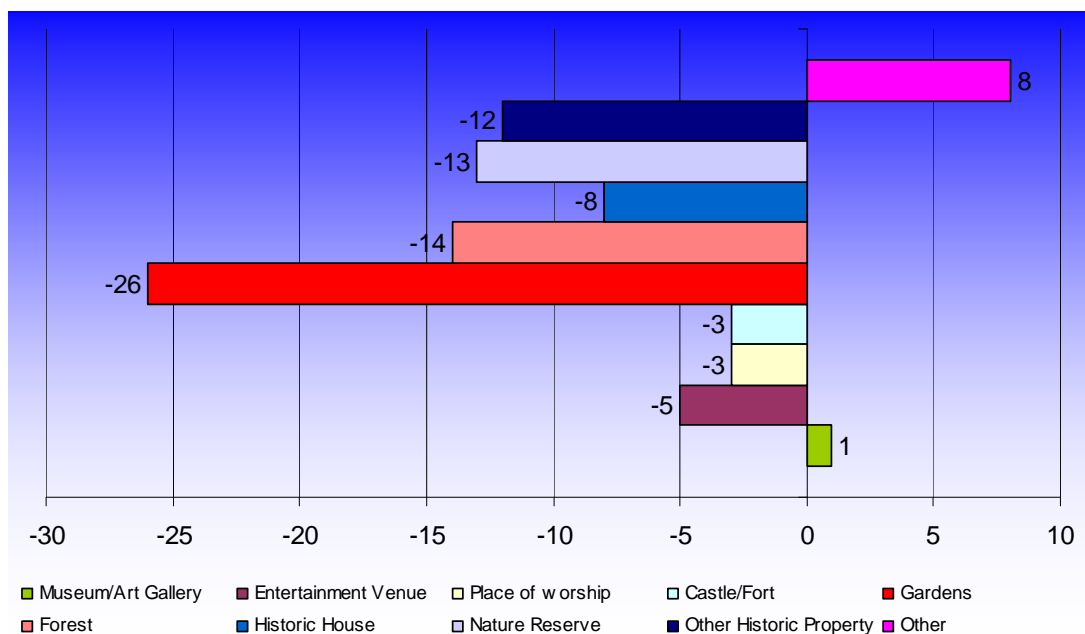


Figure 4: % change year on year by category of attraction

## 5.0 Comparisons of Paid and Free Attractions

2010 saw an even split across the top ten attractions of free and paid admission establishments. To gain an insight into the two markets this section looks individually at the top ten free and top ten paid attractions.

Despite the fact that 2 of the top 3 most visited attractions in 2010 were free, 5 of the top 10 saw a fall in visitor numbers, most significantly at the Great North Museum and Hamsterley Forest. The forest numbers felt the impact of poor weather and both the beginning and end of the year while Great North Museum saw a fall as a result of a levelling out process after the initial rush in its first year of opening. As previously mentioned attractions with the most significant growth were Locomotion in Shildon and South Shields Museum and Art Gallery.

Attraction	Numbers	% change
Durham Cathedral	600,000E	0
Great North Museum: Hancock	520,960	-19
Discovery Museum	420,837	-6
BALTIC	357,758	1
Sunderland Museum and Winter Gardens	339,091	-1
Laing Art Gallery	280,434	11
South Shields Museum and Art Gallery	195,928	19
Locomotion	194,097	25
Hamsterley Forest	169,823	-10
National Glass Centre	158,058	-13

Table 8: Free Admission Attractions

6 of the top ten paid attractions saw a fall in visitor numbers in 2010 with the Alnwick Garden seeing visitor numbers fall by almost 1/3<sup>rd</sup>. Interestingly businesses who have been very proactive in their activities during 2010 have seen a growth in visitors. Beamish saw an 8% rise as a result of a varied activities programmes supported by its admission offer of paying once and being able to visit for a year. Life also saw a growth in visitor numbers, again up by 8%, which in part was helped by the holding of the Dr. Who exhibition. Although not featuring in the top ten another attraction which had a very successful exhibition was Belsay Hall who saw visitor numbers up by a third during the summer when holding its Extraordinary Measures exhibition.

Attraction	Numbers	% change
Sage Gateshead	600,000E	0
Beamish	417,592	8
The Alnwick Garden	337,262	-31
Empire Theatre	260,668	-18
Life	214,301	8
Alnwick Castle	192,929	-8
Wallington	191,083	-3
Craggside	181,051	-19
Bamburgh Castle	140,676	-5
Customs House	129,359	0

Table 9: Paid Admission attractions

## 6.0 Leisure Facilities

Leisure facilities have a high level of usage by local communities however they still have an impact on the experience of the visitor. For this reason we have chosen not to include them in the 'attractions' sheet but feel their inclusion allows us to have a greater understanding of the wider visitor economy. Of those leisure facilities that provide data, Sunderland AFC have the highest attendance levels with match attendances in the calendar year exceeding 800,000.

Name of Leisure venue	District	Visitor numbers	% change
Sunderland AFC	Sunderland	809,652	
Dolphin Centre	Darlington	630,228	
Gateshead International Stadium	Gateshead	189,354	
Eastbourne Sports Complex	Darlington	64,690	
Whickham Thorns	Gateshead	37,082	
Archers of the Tees	Darlington	794	
<b>Total</b>		<b>1,731,800</b>	

Table 10: Leisure facilities visitor numbers

## **7.0 Background**

Since 2007 Tourism Network North East have collected attractions data on a monthly basis in order to provide more timely and accurate information which could be used by a number of audiences.

Visits to Visitor Attractions data has in previous years been collected on an annual basis by both the Moffat Centre and at the present time BDRC on behalf of VisitBritain. This normally saw data for the previous year being received in around July the following year. The Association of Leading Visitor Attractions also carry out a survey however the Regional Survey offers a higher sample of attractions than any of those done on a national basis.

As well as allowing timelier reporting on the performance of the region's attractions, responses are also used as an input for the regions economic model which measures the volume and value of tourism in the North East.

### **7.1 Defining an Attraction**

Defining a visitor attraction is a subject which can be open to much interpretation as an attraction means something different to us all.

Visit Britain defines a visitor attraction 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.

### **7.2 Sample Sizes**

97 businesses have responded to the survey and allowed their data to be published for 2010.

Where comparisons have been drawn showing percentage changes year on year only businesses who responded to both surveys have been included.

For the most up to date figures and for full monthly breakdowns please see the attractions database on [www.tourismnortheast.co.uk](http://www.tourismnortheast.co.uk)