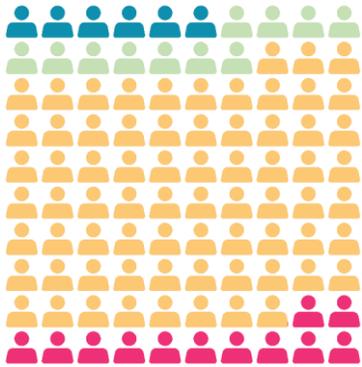


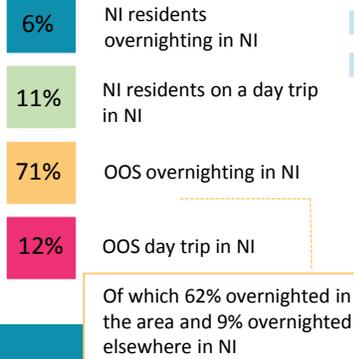
BELFAST CITY

TNI's Visitor Attitude Survey (2018)* reports a higher proportion of out of state (OOS) leisure visitors to Belfast compared with most other areas in Northern Ireland (NI), with Great Britain and North America the two largest source markets.

As a destination which encompasses NI's capital city, Belfast attracts a wide range of party types, and fewer families with young children than other areas. Visiting a specific attraction and exploring the history/culture are key motivations for visiting.



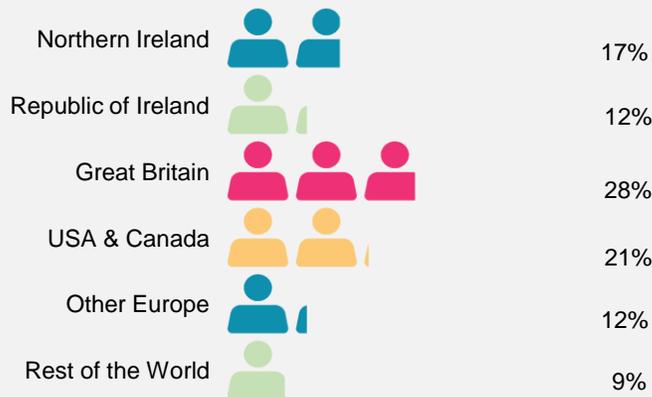
LEISURE VISITORS TO AREA



83%

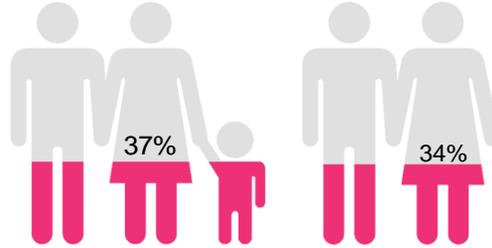
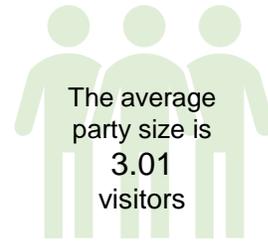
83% of visitors from out of state

ORIGIN OF THOSE VISITING DESTINATION



PARTY TYPE

37% of visitors travelled as a family and 34% travelled as a couple. 12% of visitors travelled as a group of adults, whilst 7% of visitors travelled alone and 7% were on a tour.



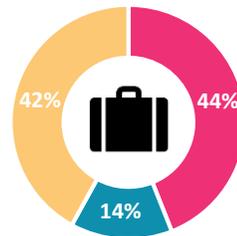
95% of OOS visitors decided to visit Belfast before arriving in NI.

Belfast attracts a higher proportion of first time visitors to NI than many other areas, with its status as NI's capital city and the attraction of Titanic Belfast helping to draw in new visitors. Compared with other areas, visitors to Belfast are most likely to have arrived directly into NI.



VISITING THE REPUBLIC OF IRELAND

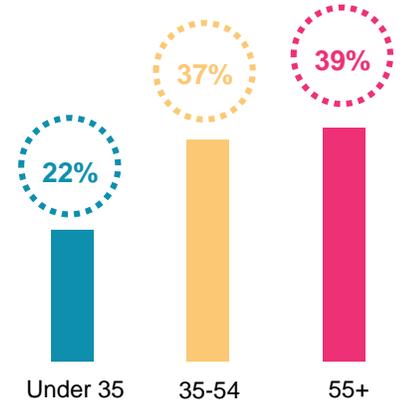
- Overnight Trip to ROI
- Day Trip to ROI
- No Trip to ROI



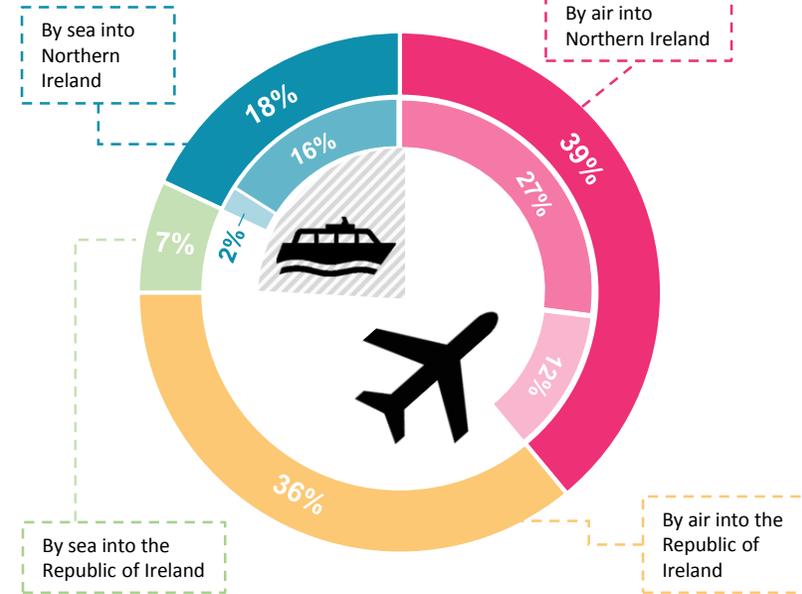
58% of those from outside NI/Republic of Ireland (ROI) who visited this area also visited the ROI.

AGE

While the majority of visitors to Belfast are aged 35 or over, the city attracts a higher proportion of younger visitors than many other NI areas.



MEANS OF TRANSPORT INTO THE ISLAND OF IRELAND



- George Best Belfast City Airport
- Larne Seaport
- Belfast Seaport
- Belfast International Airport

*SOURCE: Tourism Northern Ireland: Visitor Attitude Survey 2018, Cognisense Ltd. Total Base: n=500, OOS n=417

AREAS AND ATTRACTIONS ALSO VISITED IN NI

Attractions that influenced leisure visitors to come to Northern Ireland



65%
Belfast City



39%
Causeway Coastal Route



56%
Titanic Belfast



15%
Game of Thrones locations

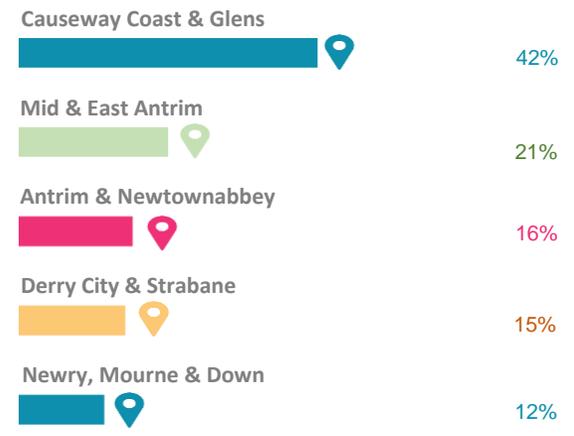


50%
Giant's Causeway



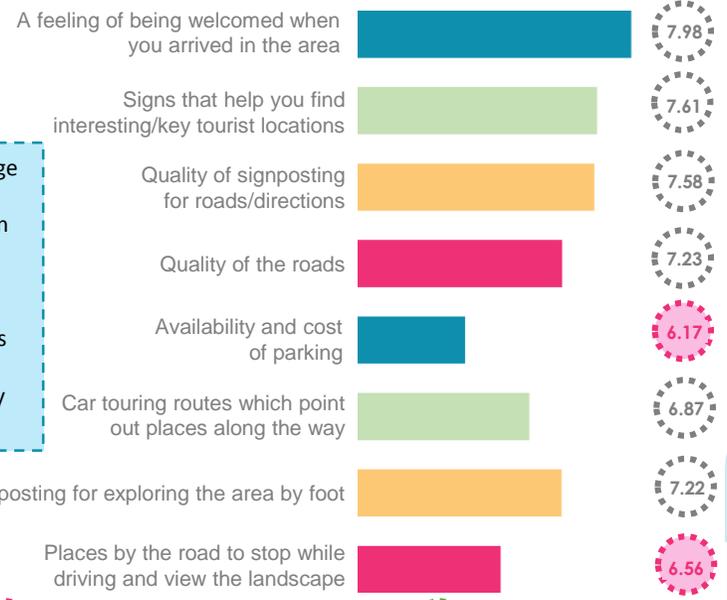
14%
Derry-Londonderry

TOP 5 OTHER AREAS VISITED



GETTING AROUND THE AREA

Public transport usage was significantly higher in Belfast than in other NI areas. Leisure visitors to Belfast were less satisfied than visitors to any other area about the availability and cost of parking.



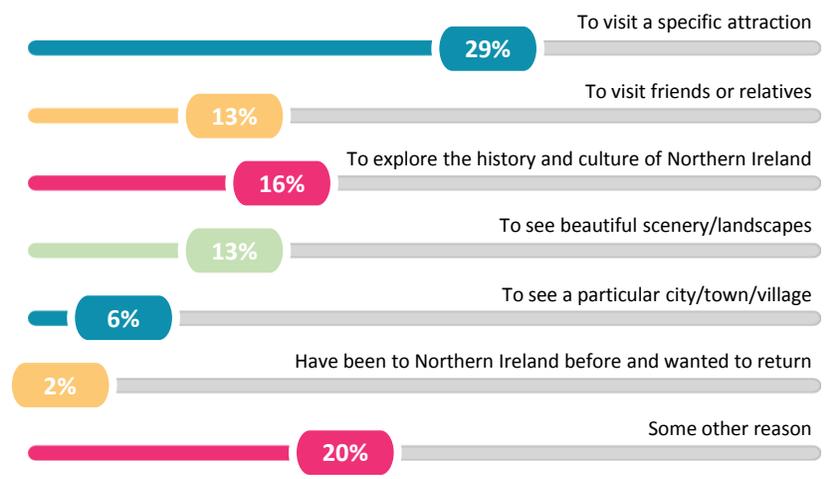
= Significantly lower than the average for all areas

= Significantly higher than the average for all areas

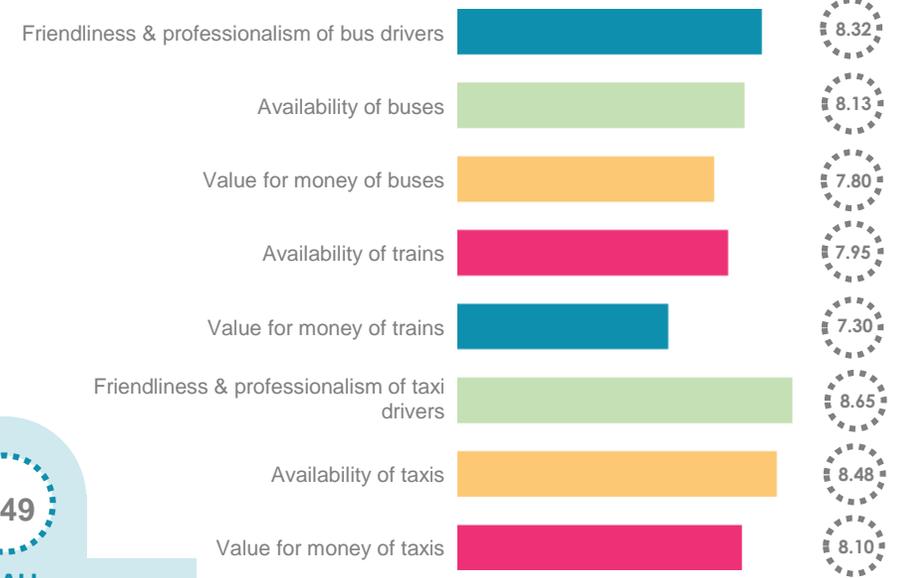
REASONS FOR VISITING BELFAST

The main reason for visiting Belfast was "to visit a specific attraction" (29%). For most this was Titanic Belfast.

Relative to other areas of NI, visitors to Belfast place more importance on exploring NI's history and culture and less importance on landscapes and scenery. This is reflected in their activities, with many visiting a museum/art gallery, a pub and/or taking a guided tour.



(Average score on scale from 0-10)



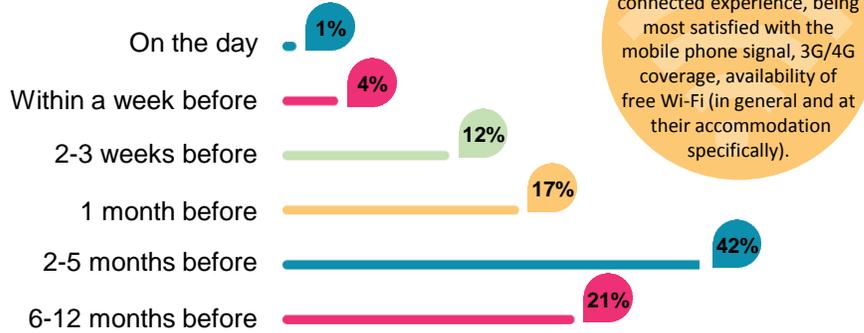
7.49
OVERALL SATISFACTION SCORE

SOURCE: Tourism Northern Ireland: Visitor Attitude Survey 2018, Cognisense Ltd.
Base: n=500, OOS n=417

PLANNING & INFORMATION

PLANNING TIMESCALE FOR NI

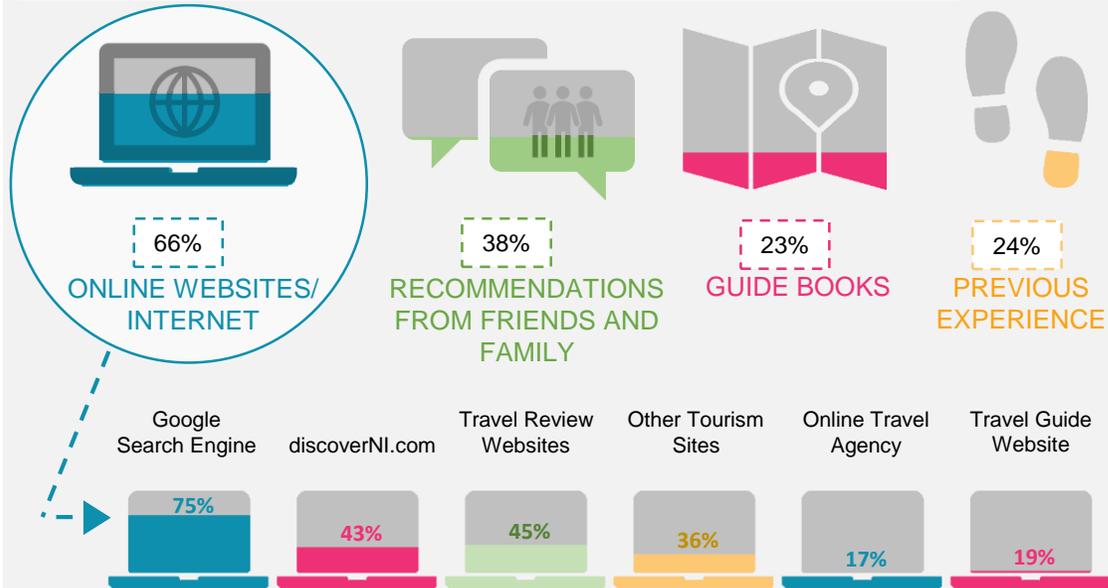
OOS leisure visitors began booking and planning their NI trip...



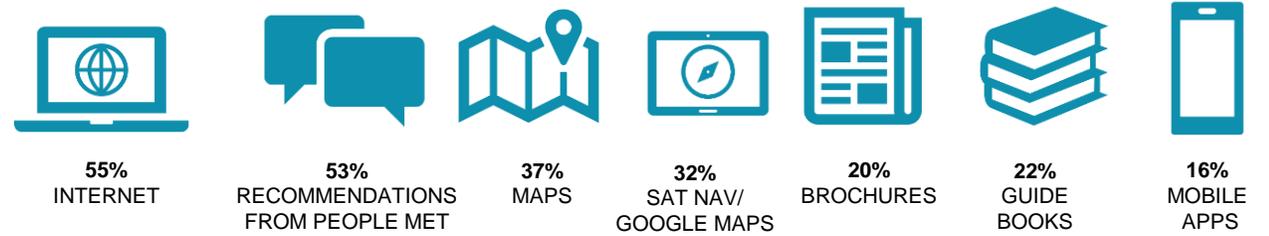
Visitors to Belfast had a more digitally connected experience, being most satisfied with the mobile phone signal, 3G/4G coverage, availability of free Wi-Fi (in general and at their accommodation specifically).

Compared to visitors to other areas in NI, leisure visitors to Belfast found it easier to plan their trip (including accommodation) and to find information on the City.

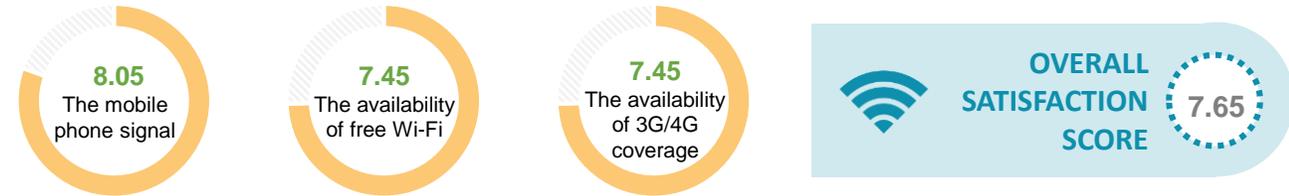
PRE-TRIP PLANNING RESOURCES



INFORMATION RESOURCES USED WHILST IN NI



DIGITAL CONNECTIVITY

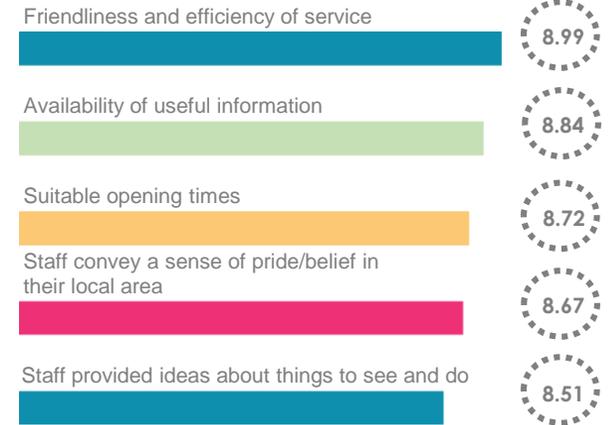


VISITOR INFORMATION CENTRES



31% received information which encouraged them to visit other areas in Northern Ireland they had not planned to visit.

14% received information which encouraged them to stay longer in Northern Ireland.



SOURCE: Tourism Northern Ireland: Visitor Attitude Survey 2018, Cognisense Ltd.

Base: n=500, OOS n=417



[†]A proportion of emails were collected at Visitor Information Centres

ACCOMMODATION



55%
Hotel



13%
Self-Catering



11%
Guest House/
B&B



16%
Staying with
Family/Friends



2%
Camping/
Motorhome

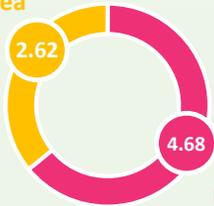
Leisure visitors to Belfast are most likely to stay in hotels. All aspects of the accommodation experience were rated strongly. Visitors to Belfast are also generally more satisfied than visitors to most other areas with the range of places to eat, information available on eating places and the suitability of opening times.

36%



of all guest houses, B&Bs and self-catering accommodation was booked through Airbnb.

Nights Spent in Council Area



Nights Spent in NI

PLACES TO EAT



OVERALL SATISFACTION SCORE

7.89



Cafes

57%



Pubs/Bars

51%

Most popular types of places to eat

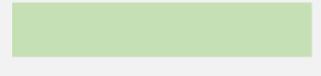
ACCOMMODATION RATINGS

Quality of accommodation



8.5

Value for money



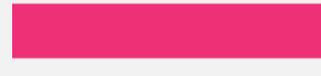
8.27

Professional and efficient customer service



8.64

Friendly and welcoming staff/host



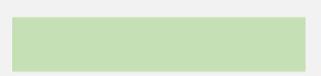
8.91

Accommodation that is a key part of the holiday experience itself



8.21

Staff knowledgeable about interesting things to see and do in local area



8.2

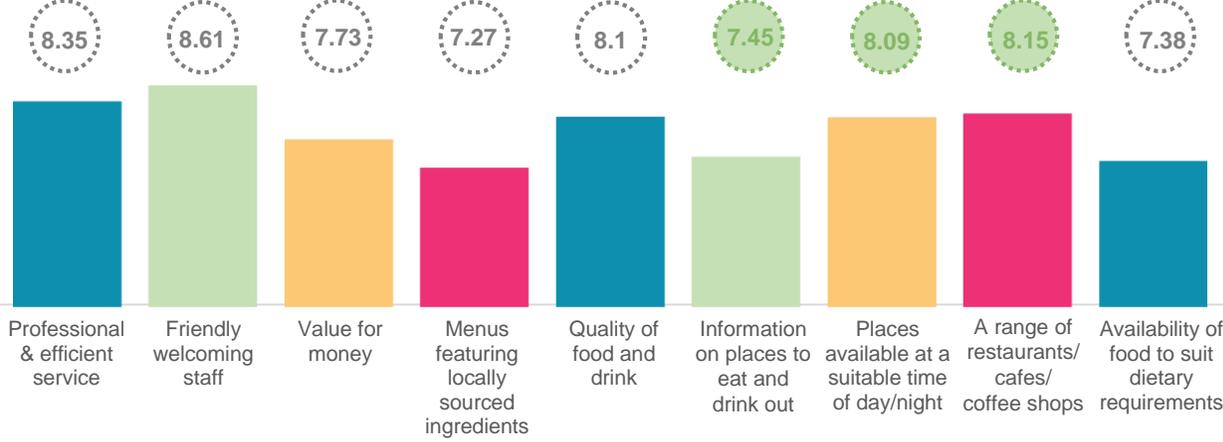
Availability of free Wi-Fi



8.61

8.48

OVERALL SATISFACTION SCORE



95%

of visitors said that the quality of the accommodation they stayed in exceeded or met their expectations. Expectations were greatly exceeded for 13%.

90%

of visitors agreed that they were able to stay in their preferred type of accommodation. Only 2% were not.

Satisfaction with Visitor Information Centres was the element of the visitor experience awarded the highest score, with accommodation coming in second. Belfast attractions and the ease of planning/booking the trip also scored highly. Getting around the area scores relatively poorly, with the availability and cost of parking in Belfast a key issue.



*Visitor Information Centre

SOURCE: Tourism Northern Ireland: Visitor Attitude Survey 2018, Cognisense Ltd.

Base: n=500, OOS n=417

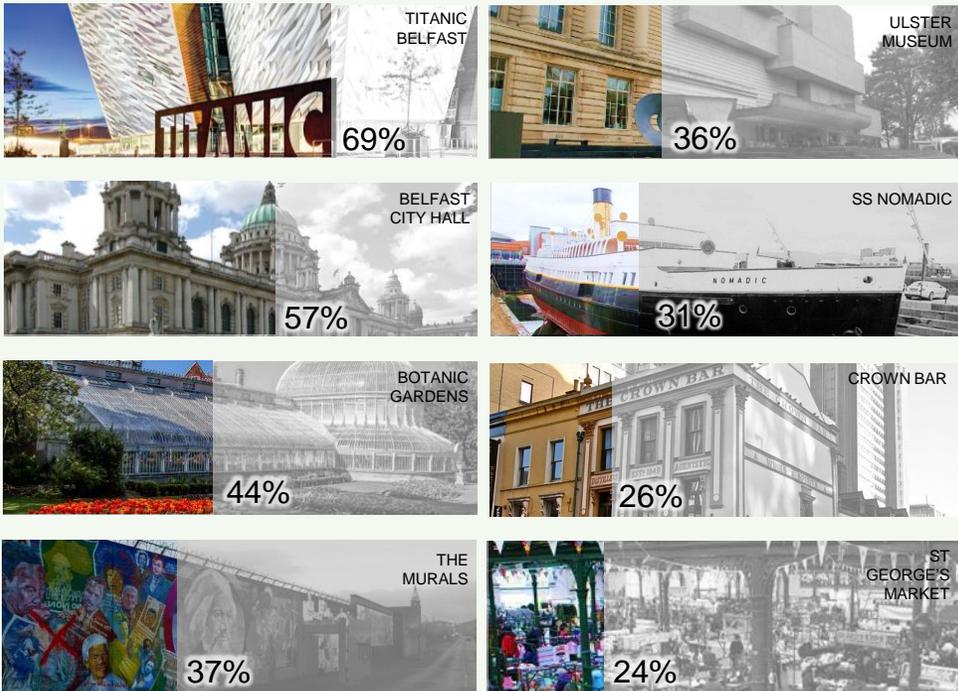
ATTRACTIONS & ACTIVITIES

Titanic Belfast and the City Hall were the top two attractions visited by Belfast leisure visitors. Botanic Gardens and the murals were also popular. Visitors to Belfast were more likely to visit pubs, museums/art galleries, take a guided tour, visit markets/breweries, the theatre and go shopping. The wide range of activities participated in reflect the City's varied tourism offering.

85% of visitors with children said that the attractions are "family friendly for children of all ages".



ATTRACTIONS VISITED IN THE AREA



RATINGS OF ATTRACTIONS IN THE AREA



8.40

OVERALL SATISFACTION SCORE



RATINGS OF THINGS TO SEE & DO IN THE AREA



7.80

OVERALL SATISFACTION SCORE



7.02

Cleanliness & availability of public toilets

7.79

Satisfaction with cleanliness in the area

8.13

Satisfaction with safety in the area



74% of visitors with children said that the things to do and see in the area are "family friendly for children of all ages".

SOURCE: Tourism Northern Ireland: Visitor Attitude Survey 2018, Cognisense Ltd. Total Base: n=500, OOS n=417

THINGS SEEN AND DONE



BEST EXPERIENCES IN THE AREA

Loved everything about it. The people were so friendly. Titanic Experience was our primary reason for visiting, but we were so impressed and moved by the history. The bus tour guide was incredible.

We had an amazing guide on the Hop On Hop Off Bus who really knew Belfast history and pointed out a ton of things that I don't think we would have seen or noticed without the guide.

Impressed with local raconteur guides: great knowledge and pride in local area, real thinking people, nothing superficial.

Titanic Belfast was exceptional. The people in the street were friendly and accommodating. All in all a lovely city.

Belfast tour to the wall and surrounding area was extremely moving. Our guides did not sugar coat the history.

We generally browse around the city and come across sites and attractions. We might meet some locals and ask for their opinion on what they think visiting people should see. We haven't been let down so far and most people we meet are very nice and friendly, which is why we go back about 2 or 3 times a year.

St. George's Market was great. The range of stalls, the live music and the busyness meant that there was a wonderful atmosphere.

The Black Cab tour was fascinating and our guide really helped explain that complex part of history and make it real for us.

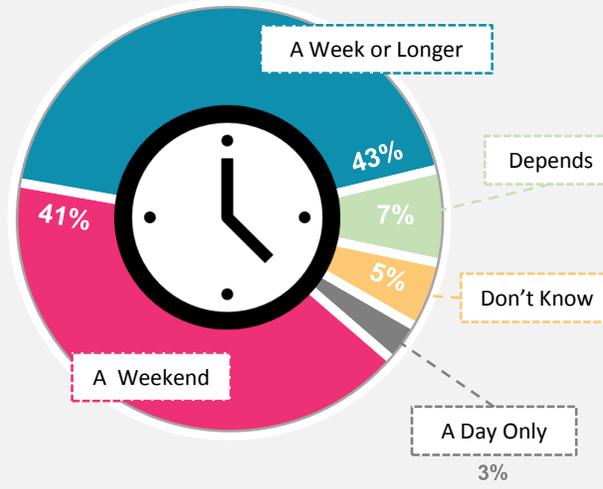
I felt safe at all times while exploring a beautiful, clean city with an interesting history and a recent rebirth.

We only stayed a night to visit the Titanic exhibition, but I would love to come back and stay longer to explore the rest of Northern Ireland. The people are among the friendliest I have met and made us feel very welcome. Overall, our visit was fantastic, but way too short. Will definitely return!

The guided tour of Crumlin Road Gaol was fantastic. Excellent tour with a very friendly and informed guide. Also the food at Cuffs restaurant was delicious.

IS THERE ENOUGH TO DO IN THE AREA

Leisure visitors think there is enough to do in the area for...



There was enough to do in all weather conditions

7.92

There was enough to do in the evenings

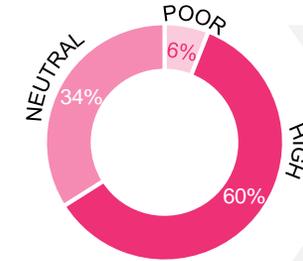
7.75

There was enough to do on Sundays

6.87

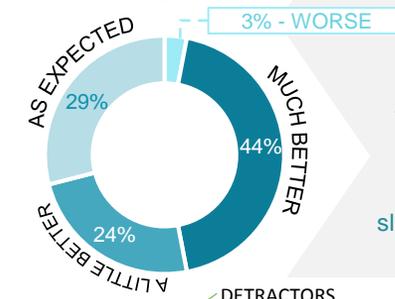
The evening offering of the area encompassing NI's capital city is rated highest of all the areas across NI.

DESTINATION EXPERIENCE



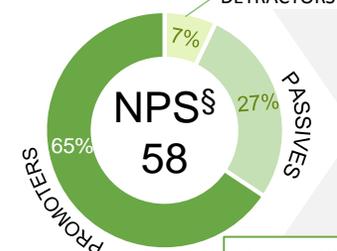
OVERALL EXPERIENCE

60% of visitors would rate their experience in this area as "Excellent". 34% are passive about their experience and only 6% would regard their experience as poor.



EXCEEDING EXPECTATIONS

44% of visitors said the trip to the area was "much better than expected". 53% said it was around the same or slightly better and only 3% said it was "worse than expected".



RECOMMEND AREA TO FAMILY AND FRIENDS

65% of visitors would definitely recommend this area. 27% are fairly likely to recommend the area and 7% would not recommend it to others.

NPS\$ 58

Average NPS for all NI council areas was 58

Visitors to Belfast are more likely to perceive the area as offering a wide range of things to see and do, though less likely to offer outdoor activities. Belfast is a destination which is viewed as being good for all weather conditions, and somewhere that offers a better evening experience. For the majority, the Belfast experience exceeded their expectations.

\$(NPS) = Net Promoter Score®

SOURCE: Tourism Northern Ireland: Visitor Attitude Survey 2018, Cognisense Ltd.

Base: n=500, OOS n=417

BELFAST CITY

| | MEASURE | BELFAST | NORTHERN IRELAND | |
|---------------------------------|---------|--|------------------|------|
| PLANNING & BOOKING | 8.30 | The availability of useful information to help you to plan your trip | 8.20 | 8.14 |
| | | The availability/ease of finding information about the different regions within Northern Ireland | 8.06 | 8.11 |
| | | Ease of finding information on the area | 8.46 | 8.27 |
| | | Ease of finding information on things to see and do in Northern Ireland | 8.53 | 8.43 |
| | | Ease of finding suitable accommodation in Northern Ireland | 8.56 | 8.14 |
| | | Ease of finding suitable accommodation in the area | 7.96 | 7.96 |
| | | Ease of booking activities and attractions online | 8.14 | 7.75 |
| | | Ease of booking accommodation online | 8.80 | 8.49 |
| | | Ease of booking transport within Northern Ireland | 7.79 | 7.19 |
| ARRIVAL | 7.91 | A feeling of being welcomed when you arrived in Northern Ireland | 8.23 | 8.11 |
| | | Clear signs to let you know when you have arrived in Northern Ireland | 7.73 | 7.48 |
| | | The availability of tourist information at the air or sea port you arrived at | 7.6 | 7.45 |
| GETTING AROUND IN THE AREA | 7.49 | Signs that help you find interesting/key tourist locations | 7.61 | 7.69 |
| | | Quality of signposting for roads/directions | 7.58 | 7.58 |
| | | Availability of trains | 7.95 | 7.88 |
| | | Value for money of trains | 7.30 | 7.52 |
| | | Availability of buses | 8.13 | 7.93 |
| | | Value for money of buses | 7.80 | 7.75 |
| | | Availability of taxis | 8.48 | 8.02 |
| | | Value for money of taxis | 8.10 | 7.86 |
| | | Friendliness and professionalism of taxi drivers | 8.65 | 8.68 |
| | | Friendliness and professionalism of bus drivers | 8.32 | 8.49 |
| | | Car touring routes which point out places along the way | 6.87 | 7.09 |
| | | A feeling of being welcomed when you arrived in the area | 7.98 | 8.08 |
| | | Places by the road to stop while driving and view the landscape | 6.56 | 6.74 |
| | | Availability and cost of car parking | 6.17 | 7.14 |
| | | Signposting for exploring the area by foot | 7.22 | 7.08 |
| Quality of the roads | 7.23 | 7.15 | | |
| VISITOR INFORMATION IN THE AREA | 8.75 | Friendliness and efficiency of service | 8.99 | 9.08 |
| | | Availability of useful information | 8.84 | 8.95 |
| | | Suitable opening times | 8.72 | 8.66 |
| | | Staff convey a sense of pride/belief in their local area | 8.67 | 8.93 |
| | | Staff provided ideas about things to see and do | 8.51 | 8.75 |

SIGNIFICANTLY HIGHER THAN THE AVERAGE FOR NI

SIGNIFICANTLY LOWER THAN THE AVERAGE FOR NI

SOURCE: Tourism Northern Ireland: Visitor Attitude Survey 2018, Cognisense Ltd.
Base: n=500, OOS n=417



SIGNIFICANTLY HIGHER THAN THE AVERAGE FOR NI

SIGNIFICANTLY LOWER THAN THE AVERAGE FOR NI

EXPERIENCE OF BELFAST CITY

| | MEASURE | BELFAST | NI |
|--|---|---------|------|
| DIGITAL CONNECTIVITY | 7.65 The mobile phone signal | 8.05 | 7.47 |
| | The availability of free Wi-Fi | 7.45 | 6.97 |
| | The availability of 3G/4G coverage | 7.45 | 6.82 |
| EATING OUT | Professional, efficient service | 8.35 | 8.22 |
| | Friendly, welcoming staff | 8.61 | 8.54 |
| | Value for money of eateries | 7.73 | 7.73 |
| | 7.89 Menus featuring locally sourced ingredients | 7.27 | 7.34 |
| | Quality of food and drink | 8.1 | 7.98 |
| | Information on places to eat and drink out | 7.45 | 7.17 |
| | Places to eat available at the times of day and night that suit you | 8.09 | 7.75 |
| | Range of restaurants/cafes/coffee shops | 8.15 | 7.74 |
| ACCOMMODATION | Availability of food to suit dietary requirements – vegetarian/vegan/gluten free | 7.38 | 7.08 |
| | 8.48 Quality of accommodation | 8.5 | 8.46 |
| | Value for money of accommodation | 8.27 | 8.22 |
| | Professional and efficient customer service | 8.64 | 8.57 |
| | Friendly and welcoming staff/host | 8.91 | 8.87 |
| | Accommodation that is a key part of the holiday experience itself | 8.21 | 8.12 |
| | Staff knowledgeable about interesting things to see and do in local area | 8.2 | 8.07 |
| ATTRactions | Availability of free Wi-Fi | 8.61 | 8.12 |
| | 8.40 Value for money of attractions (historic sites, museums, visitor centres etc.) | 8.12 | 7.95 |
| | Information at visitor attractions in your own language | 5.66 | 5.8 |
| | A range of interesting/enjoyable visitor attractions | 8.48 | 8.34 |
| | Quality of interpretation and storytelling at museums/visitor centres in area | 8.44 | 8.27 |
| | Professional and efficient staff at attractions | 8.61 | 8.56 |
| THINGS TO SEE AND DO | Friendly staff at the attractions | 8.81 | 8.8 |
| | 7.80 Unique things to do and see that reflect the area's local culture | 8.35 | 8.12 |
| | The range of outdoor activities | 7.49 | 7.8 |
| | Opportunities to attend local events/festivals | 7.15 | 6.91 |
| | Range of interesting/enjoyable things to see/do in the area | 8.38 | 8.2 |
| | Shopping opportunities | 7.76 | 7.16 |
| Somewhere you could meet and mix with the local people | 7.67 | 7.59 | |

| | MEASURE | BELFAST | NI |
|---|--|---------|------|
| EXPERIENCE | 8.27 Cities, towns & villages | 8.27 | 8.15 |
| | 8.13 Activities | 8.13 | 7.83 |
| | 8.57 Beautiful scenery/landscapes | 8.57 | 8.90 |
| | 8.51 Friendly local people | 8.51 | 8.47 |
| | 8.68 Rich history and culture of area/NI | 8.68 | 8.61 |
| | 5.89 Ability to trace ancestral links | 5.89 | 6.05 |
| | 5.97 Availability of special offers e.g. Groupon deal/good deal on accommodation | 5.97 | 5.58 |
| | 6.98 Screen tourism | 6.98 | 7.14 |
| ENOUGH TO DO | 8.73 Overall experience during this visit, based on the time you spent in area | 8.73 | 8.77 |
| | 7.92 There was enough to do in all weather conditions | 7.92 | 7.5 |
| | 7.75 There was enough to do in the evenings | 7.75 | 7.16 |
| CLEANLINESS /SAFETY | 6.87 There was enough to do on Sundays | 6.87 | 6.9 |
| | 7.02 Cleanliness and availability of public toilets | 7.02 | 7.21 |
| | 7.79 Cleanliness of area/litter free | 7.79 | 7.93 |
| | 8.15 Cleanliness of the beaches | 8.15 | 8.41 |
| 8.13 Sense of safety and security while walking around the area | 8.13 | 8.43 | |

The ease of finding information on Belfast's tourism product assists the high proportion of first-time visitors to the city. Belfast is seen to offer a wide range of attractions and activities, providing a breadth of tourism product to suit tastes and fill days and evenings.

Though generally visitors to all areas of NI felt safe, those visiting Belfast scored this aspect of their experience

lower than most other areas. Visitors to Belfast using their own car or hire car are less satisfied than visitors to any other area about the availability and cost of car parking.

They are more likely than visitors to most other areas to have had a better than expected experience.

For further information please contact the **Insights and Intelligence Service** (insights@tourismni.com)

For access to Tourism NI's Visitor Attitude Survey fact cards for Northern Ireland and for each council area, click [HERE](#).

For Tourism NI's fact cards on the value and volume of tourism in each of the 11 council areas (based on data released by NISRA), click [HERE](#).

SOURCE: Tourism Northern Ireland: Visitor Attitude Survey 2018, Cognisense Ltd.

Base: n=500 , OOS n=417

INTERPRETING TNI'S 2018 VISITOR ATTITUDE SURVEY



SURVEY BACKGROUND & RATING SCALE

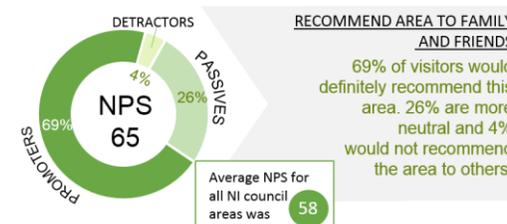
- Tourism Northern Ireland's (TNI) 2018 Visitor Attitude Survey (VAS) was carried out by Cognisense, an experienced market research company. The research was conducted in compliance with the International Standard ISO 20252:2012
- The VAS collected information on a wide range of areas to help TNI better understand visitor profiles, behaviours and attitudes towards tourism products and services
- The **VAS supplements national and local government level data** on tourism which is collected throughout the year by a number of agencies, and is published by the Northern Ireland Statistics and Research Agency (NISRA) – click [HERE](#) for NISRA's Northern Ireland (NI) tourism statistics
- The VAS is undertaken during **high season only** and therefore the findings reflect the views of those taking a trip in NI between June-October 2018 only
- **Participants of the VAS were approached in key tourism locations/attractions** across NI's 11 council areas and invited to take part in a short face-to-face survey, followed by an on-line survey on completion of their trip
- The sample comprised **leisure overnight and day trip visitors** (e.g. visitors on a trip to NI for purely business purposes were excluded)
- **NI and out-of-state (from outside NI) visitors** on a day or overnight leisure trip in NI were eligible to participate

Respondents were asked to rate various experiences on a scale of 0-10.

Generally, satisfaction scores over 8 are excellent, between 7-8 are adequate and less than 7 require attention.

NET PROMOTER SCORES

Net Promoter Scores (NPS®) are presented in the survey findings.



The NPS is determined by subtracting the percentage who are detractors from the percentage who are promoters.

- What is generated is a score between -100 and 100
- At one end of the spectrum, if everyone gave a score lower or equal to 6, this would lead to a NPS of -100
- On the other end of the spectrum, if everyone answered with a 9 or 10, then the total NPS would be 100



$$\text{NPS} = \% \text{ 😊 } - \% \text{ ☹ }$$

- Each council fact card contains the council level NPS (based on the number who would recommend the area), together with the average NPS score for all NI council areas
- The NI fact card contains a NI level NPS score, based on those who would recommend NI
- The council level and NI level NPS scores are not directly comparable as the former relates to the area, while the latter relates to NI. The NI NPS is based only on responses from out of state visitors, while the council level NPS is based on scores from both domestic and out of state visitors

NPS®, Net Promoter® & Net Promoter® Score are registered trademarks of Satmetrix Systems, Inc., Bain & Company and Fred Reichheld.