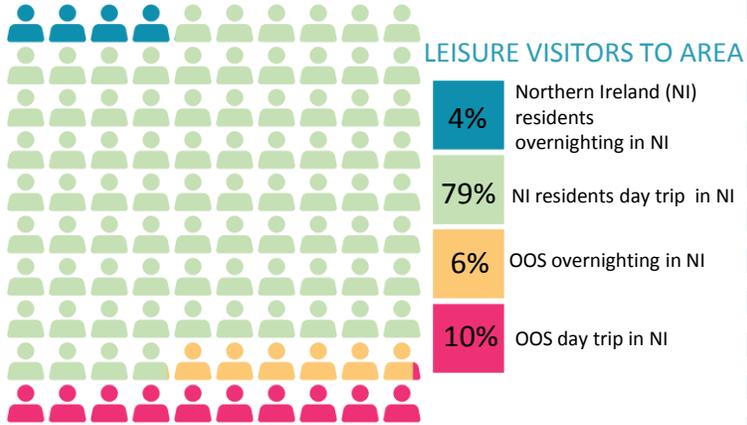
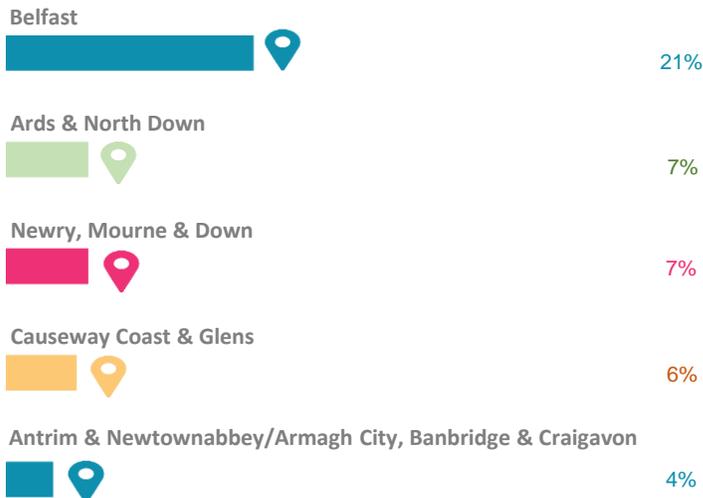


LISBURN & CASTLEREAGH CITY

TNI's Visitor Attitude Survey (2018)* reports a largely domestic market for Lisburn & Castlereagh City, the vast majority of whom are on a day trip to the area. Great Britain is the area's largest out of state (OOS) source market, just ahead of the Republic of Ireland (ROI).

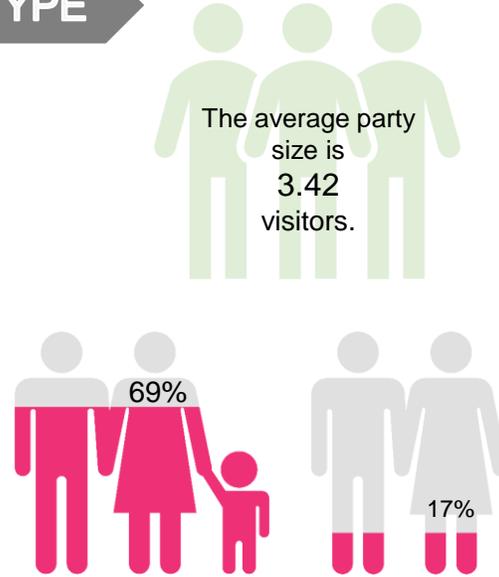


TOP 5 OTHER AREAS VISITED



PARTY TYPE

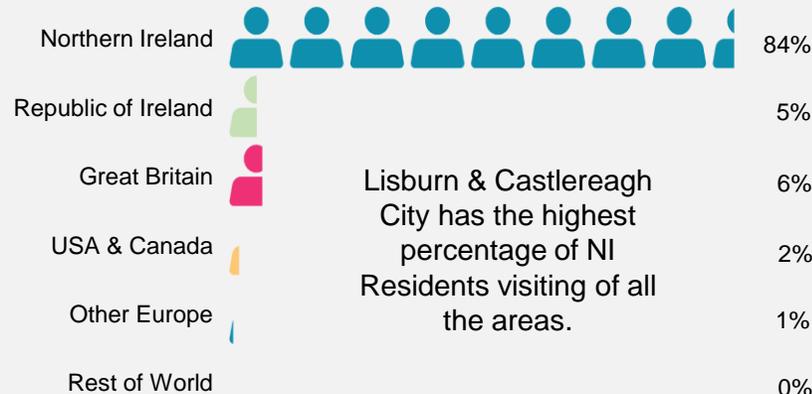
The majority of visitors (69%) travelled as a family, whilst 17% of visitors travelled as a couple. 7% travelled as a group of adults and 6% of visitors travelled alone.



16%

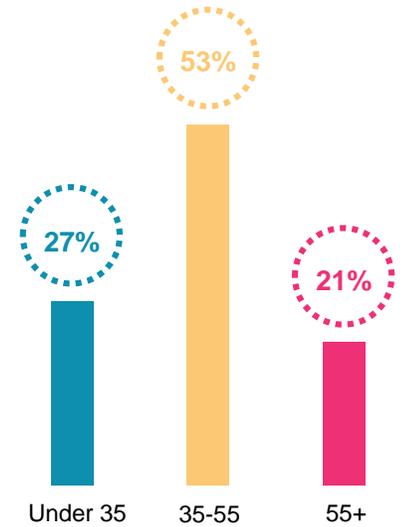
16% of visitors from out of state.

ORIGIN OF THOSE VISITING DESTINATION

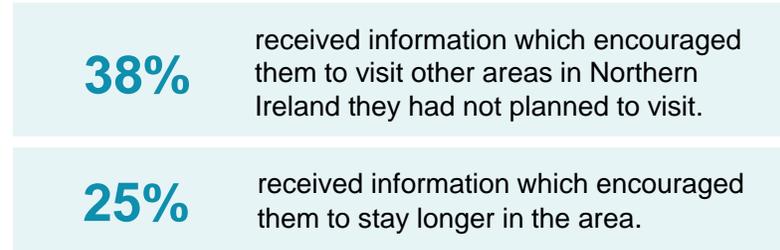
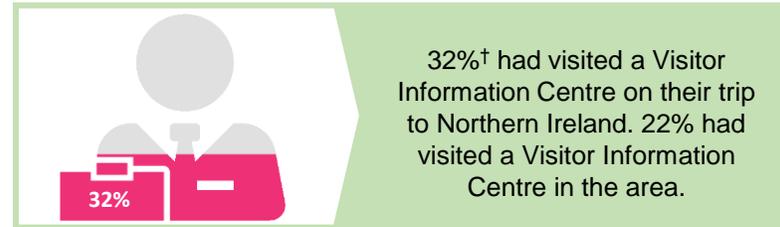


AGE

More than half of visitors to Lisburn & Castlereagh City were aged between 35-55. Relative to other NI areas, Lisburn & Castlereagh City attracts the highest proportion of visitors aged under 35.



VISITOR INFORMATION



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

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

Base: n=253

THINGS SEEN AND DONE

Visited a forest, park or garden



Attended an event/festival



Visited a pub



Visited a museum or art gallery



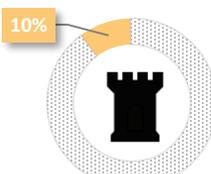
Went shopping



Visited a cathedral or church



Visited a castle /other historic monument



Took a guided tour



ATTRACTIONS VISITED IN THE AREA



Hillsborough Castle & Gardens



Hillsborough Court House



Irish Linen Centre & Lisburn Museum

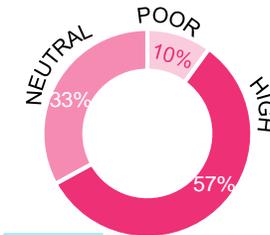


St Malachy's Church

The following attractions were each visited by 1% of visitors:
Island Arts Centre, Harry Ferguson Memorial Garden, Streamvale Open Farm, and We are Vertigo

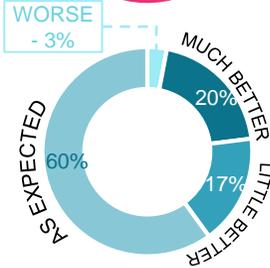
A high percentage of visitors responded with "None of these/Don't Know" (80%).

VISITOR EXPERIENCE



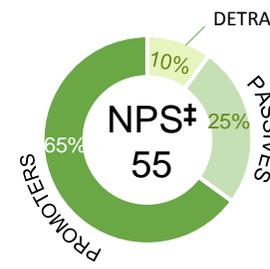
OVERALL EXPERIENCE

57% of leisure visitors would rate their experience in this area as "Excellent". 33% are passive about their experience and only 10% would regard their experience as poor.



EXCEEDING EXPECTATIONS

20% of visitors said the trip to the area was "much better than expected". 77% 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. 25% are fairly likely to recommend the area and 10% would not recommend the area.

Visitors to Lisburn & Castlereagh City had the lowest participation rates of all the areas for many of the typical leisure activities asked about (e.g. visiting a forest park/garden or a museum/art gallery). Relative to visitors to other areas, they are also significantly less likely to visit local attractions. Due to the preponderance of NI visitors, for three fifths the experience was as expected. The majority of leisure visitors would recommend a visit to the area to family/friends. Widening the visitor experience could encourage more OOS and overnight visitors to the area. The opening of Hillsborough Castle to the public (since this research was conducted) has greatly enhanced Lisburn & Castlereagh City's tourism offering.

[‡](NPS) = Net Promoter Score®

BEST EXPERIENCES IN THE AREA

Everything about it was great, the people, the culture, the food, pubs and live music.

Seeing and visiting sites of historic and cultural importance.



Visiting beautiful floral displays in Hillsborough.

People were so friendly everywhere! The scenery and small towns.

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

Base: n=253

INTERPRETING TNI'S 2018 VISITOR ATTITUDE SURVEY



SURVEY BACKGROUND & RATING SCALE

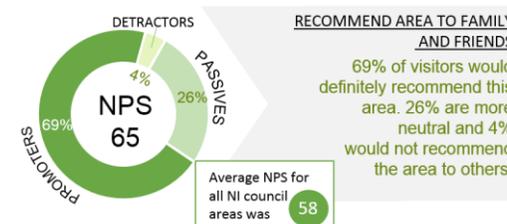
- Tourism Northern Ireland's (TNI) 2018 Visitor Attitude Survey (VAS) was carried out by Cognisense, an experienced market research company. The research was conducted in compliance with the International Standard ISO 20252:2012
- The VAS collected information on a wide range of areas to help TNI better 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.