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## Visitor Attitude Survey 2014 (NI Destinations)

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# Findings



# Background

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## Background

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- This research was required to assist NI's Tourism Destinations in delivering a quality visitor experience
- Northern Ireland has 9 key tourism areas (known as Destinations), with each Destination providing a unique tourism experience
- The aim of the research, similar to that conducted in 2011, was to interview a representative sample of visitors at each of the nine destinations in order to profile leisure visitors both domestic trip takers and out-of-state visitors
- The research also was required to provide a measure of the holiday experience of those visitors through an analysis of their behaviours and attitudes towards each regions tourism product and services

# Methodology

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## Overall Methodology

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- The first stage, from June to October, involved conducting brief face-to-face interviews with visitors across the nine destinations
- 10,303 face-to-face contacts were made, at over 60 locations or tourist attractions, with brief details collected, on the type of trip they were taking and their origin, in order to provide an overall profile of visitors to each destination
- At this stage all respondents were asked if they would provide their email address so they could be invited to take part in further online survey
- Over 9,000 email addresses were collected
- A more detailed face-to-face interview was conducted with 2,966 respondents in order to provide a broader picture of visitors to each destination including party type, other destinations they were visiting, where they were staying over (if relevant) and their motivations for taking the trip and reasons for choosing each destination
- The second stage involved an online survey, for which respondents were invited to participate in following their trip. 1,796 fully completed this survey which covered behaviour and attitudes across all elements of the consumer journey, from planning through to their experiences on the trip

# Profile

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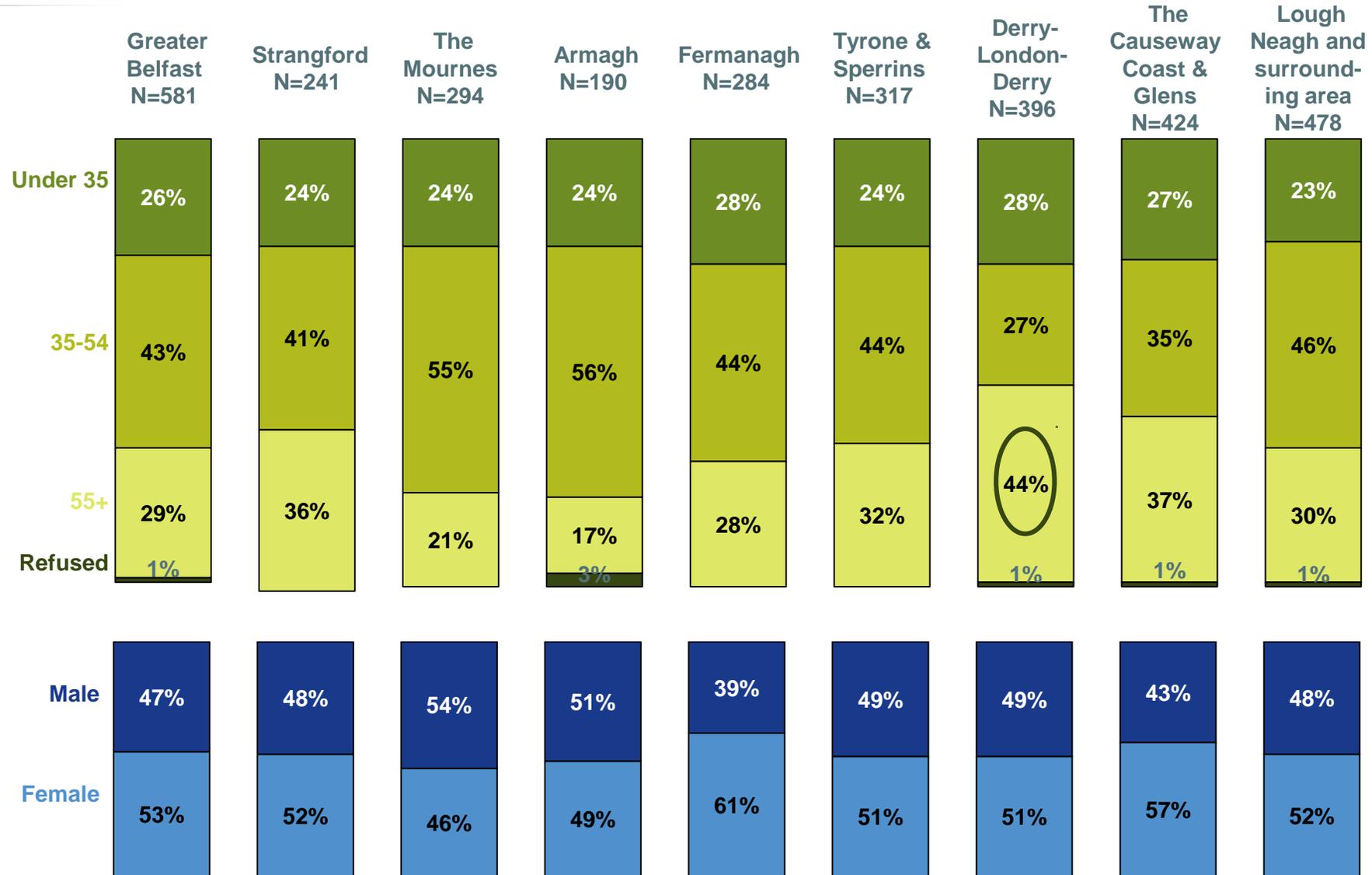
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## Sample Breakdown - Origin of Visitors to Destinations\*

Interview Destination →	Greater Belfast N=1791*	Strangford N=912	The Mournes n=951	Armagh N=610	Fermanagh N=888	Tyrone & Sperrins N=968*	Derry-London-Derry N=1116	The Causeway Coast & Glens N=2071*	Lough Neagh and surrounding area N=1370*
Northern Ireland	33%	79%	79%	79%	42%	55%	28%	36%	85%
Republic of Ireland	20%	5%	8%	10%	23%	16%	18%	11%	3%
GB & Other British Isles	19%	11%	7%	8%	13%	10%	16%	16%	8%
Other Europe	10%	1%	2%	1%	8%	4%	19%	13%	2%
USA & Canada	13%	3%	2%	1%	12%	13%	13%	16%	2%
Australia & new Zealand	4%	1%	1%	< 1%	1%	1%	4%	5%	1%
Other	2%	1%	< 1%	< 1%	< 1%	1%	2%	4%	< 1%

**Profile of visitors to each Destination:** Those visiting Fermanagh and the Causeway Coast & Glens were slightly more likely than visitors to other areas to be female. In terms of age, all areas attracted fairly similar proportions aged under 35, with this age groups making up around a quarter of all visitors to each region. Otherwise those visiting The Mourne and Armagh (two areas with a high proportion of families visiting) had a greater than average proportion visiting who were aged 35-54. Those visiting Derry/Londonderry were more likely than others to be aged over 55.



Profile  
[ Base: All respondents n=2966 ]

**Party Type Visiting Interview Destination:** Those travelling as a family with children made up a very significant proportion of those visiting Armagh. This party type was also significant, albeit less so, for Strangford, Lough Neagh, and the Mournes. Those visiting Fermanagh, Tyrone & Sperrins, Derry/Londonderry and the Causeway Coast & Glens were all slightly more likely to be visiting with a partner or spouse. Those visiting Derry/Londonderry, Causeway Coast & Glens and Fermanagh were least likely to have children in their party.

Interview Destination →	Greater Belfast N=581	Strangford N=241	The Mournes N=294	Armagh N=190	Fermanagh N=284	Tyrone & Sperrins N=317	Derry-London-Derry N=396	The Causeway Coast & Glens N=424	Lough Neagh and surrounding area N=478
On my own	8%	1%	9%	3%	2%	3%	20%	8%	6%
Couple (partner/spouse)	25%	32%	30%	21%	42%	43%	31%	32%	28%
Family with children	38%	44%	42%	73%	30%	37%	16%	27%	46%
With friends (incl both family and friends)	17%	15%	14%	2%	19%	9%	18%	21%	10%
Wider family (incl with parents only)	9%	11%	6%	5%	8%	12%	13%	11%	6%
3 generation (children and parents/with grandchildren)	6%	5%	3%	6%	4%	4%	3%	5%	5%
On tour/special interest/school group	3%	1%	*	1%	1%	3%	7%	7%	5%
With work colleagues	1%	*	0	1%	1%	2%	3%	1%	1%
Family with children under 11	31%	37%	35%	63%	25%	32%	6%	19%	38%
Family with teenagers 11-16	14%	13%	12%	21%	11%	11%	12%	9%	13%
Children in party	41%	44%	43%	73%	31%	39%	17%	29%	47%
No children in party	59%	56%	57%	27%	69%	61%	83%	71%	53%

Party Type Visiting Interview destination  
[ Base: All full screener interviews n=2966 ]

# Other Places Visited and Stayed Over In

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**Destinations Visited or Planned to Visit on Current Trip - Out of State Visitors:** Out-of-State visitors were much more likely to have visited at least one other destination, with a significant proportion of visitors to each destination also taking in a visit to Belfast (especially those interviewed in Strangford, Causeway Coast & Lough Neagh) or to Causeway Coast (especially those in Belfast, Strangford, Lough Neagh and Derry/Londonderry). Other popular overlaps included Strangford & The Mournes; Fermanagh & Derry/Londonderry; Armagh & The Mournes; Tyrone & Derry/Londonderry; Tyrone & Fermanagh and Lough Neagh & The Mournes.

Interview Destination Also visited / planned to visit	Greater Belfast n=300	Strangford n=53	The Mournes n=61	Armagh n=47	Fermanagh n=142	Tyrone & Sperrins n=137	Derry-Londonderry n=306	The Causeway Coast & Glens n=252	Lough Neagh and surrounding n=93*
Belfast City/Greater Belfast	100%	55%	31%	32%	27%	38%	36%	64%	49%
Strangford	9%	100%	16%	9%	4%	4%	2%	4%	24%
The Mournes	13%	40%	100%	21%	13%	9%	5%	8%	26%
Armagh	5%	2%	8%	100%	9%	13%	7%	5%	31%
Fermanagh	8%	13%	8%	9%	100%	21%	9%	8%	19%
Tyrone & Sperrins	3%	2%	10%	9%	18%	100%	13%	11%	14%
Derry-Londonderry	24%	21%	15%	15%	23%	28%	100%	45%	23%
The Causeway Coast & Glens	52%	57%	25%	32%	38%	31%	49%	100%	53%
Lough Neagh and surrounding area	9%	13%	10%	15%	5%	11%	9%	7%	100%

**Key Destinations visited or planned to visit**

[ Base: All screener respondents from outside NI n=1346] \* Overlaps with other regions

# Reasons and Motivations for Visiting

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**Reasons for Visiting Destination:** The most frequently cited reason for visiting many of the destinations, in particular Armagh and Tyrone & Sperrins was to visit a specific attraction. For those destinations where the higher proportion of visitors were domestic day trippers, returning to somewhere they had been before or visiting a favourite place was high on the list. Those visiting Derry/Londonderry were more likely to be visiting friends or relatives than visitors to other areas, while those visiting Fermanagh and Causeway Coast & Glens (more likely to be out of state visitors) were wanting to discover or explore somewhere new.

Interview Destination →	Greater Belfast n=581	Strangford n=241	The Mournes n=294	Armagh n=190	Fermanagh n=284	Tyrone & Sperrins n=317	Derry-Londonderry n=396	The Causeway Coast & Glens n=424	Lough Neagh and surrounding n=478
To visit a specific attraction	47%	48%	32%	69%	23%	54%	24%	45%	48%
To discover or explore somewhere new	20%	20%	17%	22%	30%	21%	28%	34%	22%
Been before and wanted to return	13%	29%	37%	6%	27%	21%	17%	25%	30%
To visit a number of different places in the area	13%	15%	13%	8%	26%	12%	23%	30%	12%
To visit a favourite place	10%	16%	21%	24%	12%	16%	13%	15%	27%
To visit friends or relatives	15%	9%	10%	6%	17%	11%	29%	15%	13%
To learn about the area and/or its people	8%	10%	6%	7%	13%	13%	21%	23%	9%
To take part in a particular activity	12%	9%	28%	13%	5%	7%	13%	9%	18%
You are particularly interested in a theme related to this area	8%	12%	5%	14%	3%	8%	16%	11%	5%
To go to a particular festival or event	4%	3%	5%	8%	6%	7%	16%	5%	6%
To enjoy local produce/food	3%	10%	7%	3%	5%	4%	11%	9%	5%
To follow a trail around the area by car	1%	2%	2%	2%	11%	3%	8%	10%	3%
To eat out in a particular restaurant	2%	2%	7%	2%	3%	2%	3%	4%	5%
A good deal on overnight accommodation	1%	3%	1%	2%	13%	3%	2%	3%	2%
To stay in a particular accommodation establishment	1%	0	1%	1%	7%	*	2%	1%	3%
Other	15%	8%	10%	2%	1%	9%	11%	11%	10%
None of these reasons	2%	2%	1%	1%	2%	1%	1%	1%	1%

Reasons for Visiting Key Interview Destinations

[ Base: All screener respondents n=2966]

**Reasons for Visiting Strangford:** To visit a specific attraction was the stand out reason for visiting Strangford amongst most visitors but even more so those from outside NI and those on a day trip only to the area. Those visiting from out-of-state were also keen to discover somewhere new and to learn about the area and the people and to visit a number of places in the region as well as visiting friends or relatives. However those who were staying over were most likely to be revisiting the area as were many domestic visitors.

Interview Destination →	Strang-ford n=241	NI Residents n=188	OOS n=53	Stayed over in Destination n=50	Day trip only to Destination n=191
To visit a specific attraction	48%	45%	58%	24%	54%
To discover or explore somewhere new	20%	14%	38%	18%	20%
Been before and wanted to return	29%	33%	13%	34%	27%
To visit a number of different places in the area	15%	9%	34%	12%	15%
To visit a favourite place	16%	16%	13%	12%	17%
To visit friends or relatives	9%	3%	30%	12%	8%
To learn about the area and/or its people	10%	6%	25%	4%	12%
To take part in a particular activity	9%	10%	6%	10%	9%
You are particularly interested in a theme related to this area	12%	12%	9%	4%	14%
To go to a particular festival or event	3%	4%	2%	8%	2%
To enjoy local produce/food	10%	9%	13%	2%	12%
To follow a trail around the area by car	2%	0	9%	4%	2%
To eat out in a particular restaurant	2%	2%	4%	2%	3%
A good deal on overnight accomodation	3%	1%	9%	4%	3%
To stay in a particular accomodation establishment	0	0	0	0	0
Other	8%	6%	15%	18%	6%
None of these reasons	2%	2%	2%	6%	1%

Reasons for Visiting Strangford  
[ Base: All Strangford n=241]

**Reasons for Visiting The Mournes:** Wanting to visit a specific attraction was less important to visitors in the Mournes area, as was discovering somewhere new. Rather many, particularly those staying over, were return visitors who had been before. A significant proportion of out-of-state were visiting friends or relatives while many NI visitors and/or those on a day trip were wanting to visit a favourite place or take part in a particular activity.

Interview Destination →	The Mournes n=294	NI Residents n=233	OOS n=61	Stayed over in Destination n=102	Day trip only to Destination n=192
To visit a specific attraction	32%	32%	31%	25%	36%
To discover or explore somewhere new	17%	15%	25%	25%	13%
Been before and wanted to return	37%	39%	30%	43%	33%
To visit a number of different places in the area	13%	11%	20%	17%	11%
To visit a favourite place	21%	21%	20%	13%	26%
To visit friends or relatives	10%	5%	28%	11%	9%
To learn about the area and/or its people	6%	3%	15%	8%	5%
To take part in a particular activity	28%	31%	13%	17%	33%
You are particularly interested in a theme related to this area	5%	5%	5%	4%	6%
To go to a particular festival or event	5%	6%	0	7%	4%
To enjoy local produce / food	7%	6%	10%	6%	7%
To follow a trail around the area by car	2%	1%	7%	3%	2%
To eat out in a particular restaurant	7%	7%	8%	2%	10%
A good deal on overnight accomodation	1%	1%	2%	4%	0
To stay in a particular accomodation establishment	1%	*	2%	2%	0
Other	10%	10%	11%	9%	11%
None of these reasons	1%	2%	0	3%	1%

Reasons for Visiting The Mournes  
[ Base: All Mournes respondents n=294]

**Reasons for Visiting Armagh:** Domestic visitors and/or those on a day trip only in the area were very much more likely to be visiting the region to go to a specific attraction, with the planetarium a popular location (a large proportion of the interviewing was conducted here); this region also had a large proportion of families visiting. The proportion visiting from out-of-state, and particularly those staying overnight, was low, but as per other regions, this group were also likely to want to discover somewhere new, visit a number of places, visit friends or relatives or indeed visit a favourite place.

Interview Destination →	Armagh n=190	NI Residents n=143	OOS n=47*	Stayed over in Destination n=17*	Day trip only to Destination n=173
To visit a specific attraction	69%	73%	60%	53%	71%
To discover or explore somewhere new	22%	22%	21%	41%	20%
Been before and wanted to return	6%	6%	6%	6%	6%
To visit a number of different places in the area	8%	6%	15%	24%	7%
To visit a favourite place	24%	23%	28%	35%	23%
To visit friends or relatives	6%	2%	17%	29%	3%
To learn about the area and/or its people	7%	6%	11%	18%	6%
To take part in a particular activity	13%	15%	6%	18%	13%
You are particularly interested in a theme related to this area	14%	14%	15%	24%	13%
To go to a particular festival or event	8%	9%	4%	6%	8%
To enjoy local produce/food	3%	2%	4%	6%	2%
To follow a trail around the area by car	2%	1%	2%	6%	1%
To eat out in a particular restaurant	2%	2%	0	0	2%
A good deal on overnight accomodation	2%	2%	2%	6%	2%
To stay in a particular accomodation establishment	1%	1%	0	0	1%
Other	2%	2%	2%	6%	2%
None of these reasons	1%	1%	2%	0	1%

**Reasons for Visiting Armagh**

[ Base: All Armagh respondents n=190] \* Caution Low Base

**Reasons for Visiting Fermanagh:** With a higher proportion of out-of-state and overnight visitors to this region, it is not surprising that the most frequently cited reason for visiting is to discover or explore something new. As seen in other areas wanting to visit a number of places in the area and to visit friends and relatives was high on the agenda for those from outside NI. A good deal on accommodation was cited by one fifth of those who overnighted in the destination.

Interview Destination →	Fermanagh n=284	NI Residents n=142	OOS n=142	Stayed over in Destination n=148	Day trip only to Destination n=136
To visit a specific attraction	23%	19%	27%	20%	27%
To discover or explore somewhere new	30%	25%	35%	28%	32%
Been before and wanted to return	27%	33%	21%	32%	22%
To visit a number of different places in the area	26%	17%	35%	26%	26%
To visit a favourite place	12%	8%	15%	11%	12%
To visit friends or relatives	17%	9%	25%	18%	15%
To learn about the area and/or its people	13%	7%	20%	16%	11%
To take part in a particular activity	5%	4%	6%	7%	3%
You are particularly interested in a theme related to this area	3%	4%	1%	3%	2%
To go to a particular festival or event	6%	6%	6%	8%	4%
To enjoy local produce/food	5%	5%	4%	5%	4%
To follow a trail around the area by car	11%	8%	14%	12%	10%
To eat out in a particular restaurant	3%	2%	4%	3%	2%
A good deal on overnight accomodation	13%	13%	12%	20%	4%
To stay in a particular accomodation establishment	7%	7%	6%	10%	3%
Other	1%	1%	1%	1%	1%
None of these reasons	2%	3%	1%	1%	3%

Reasons for Visiting Fermanagh  
[ Base: All Fermanagh respondents n=284]

**Reasons for Visiting Tyrone & Sperrins:** A popular attraction in this area was the Ulster American Folk Park and hence this was key location for interviews and amongst many of those visiting the region, especially those from NI and/or taking a day trip only, visiting a specific attraction was the most widely cited reason for visiting this region. However, many of those staying over were visiting a number of places and/or visiting friends or relatives. A good deal on accommodation was cited by almost one fifth of those who overnights in the destination.

Interview Destination →	Tyrone & Sperrins n=317	NI Residents n=180	OOS n=137	Stayed over in Destination n=31*	Day trip only to Destination n=286
To visit a specific attraction	54%	61%	46%	42%	56%
To discover or explore somewhere new	21%	16%	28%	35%	19%
Been before and wanted to return	21%	24%	17%	16%	22%
To visit a number of different places in the area	12%	4%	23%	23%	11%
To visit a favourite place	16%	18%	15%	10%	17%
To visit friends or relatives	11%	2%	24%	29%	9%
To learn about the area and/or its people	13%	8%	18%	19%	12%
To take part in a particular activity	7%	4%	11%	10%	7%
You are particularly interested in a theme related to this area	8%	4%	12%	6%	8%
To go to a particular festival or event	7%	6%	8%	10%	7%
To enjoy local produce/food	4%	1%	7%	3%	4%
To follow a trail around the area by car	3%	2%	4%	10%	2%
To eat out in a particular restaurant	2%	1%	3%	3%	2%
A good deal on overnight accommodation	3%	2%	4%	19%	1%
To stay in a particular accommodation establishment	*	1%	0	2%	0
Other	9%	7%	10%	3%	9%
None of these reasons	1%	2%	0	0	1%

Reasons for Visiting Tyrone & Sperrins

[ Base: All Tyrone & Sperrins respondents n=317] \* Caution low base

**Reasons for Visiting Derry~Londonderry:** Compared to other regions a large proportion of visitors to this region are from outside NI and as such the overall reasons for visiting are influenced by their reasons for visiting, which are more likely to include visiting friends or relatives, wanting to discover or explore somewhere new, wanting to visit a number of different places in the region and to learn about the area and the people.

Interview Destination →	Derry-London-Derry n=396	NI Residents n=90	OOS n=306	Stayed over in Destination n=161	Day trip only to Destination n=235
To visit a specific attraction	24%	24%	24%	25%	23%
To discover or explore somewhere new	28%	14%	32%	32%	26%
Been before and wanted to return	17%	22%	16%	16%	18%
To visit a number of different places in the area	23%	12%	27%	25%	23%
To visit a favourite place	13%	14%	12%	14%	12%
To visit friends or relatives	29%	10%	35%	33%	26%
To learn about the area and/or its people	21%	9%	25%	25%	18%
To take part in a particular activity	13%	10%	14%	16%	11%
You are particularly interested in a theme related to this area	16%	9%	19%	21%	13%
To go to a particular festival or event	16%	17%	15%	20%	12%
To enjoy local produce/food	11%	18%	8%	9%	11%
To follow a trail around the area by car	8%	0	10%	4%	11%
To eat out in a particular restaurant	3%	7%	2%	3%	3%
A good deal on overnight accomodation	2%	3%	2%	3%	2%
To stay in a particular accomodation establishment	2%	0	3%	5%	*
Other	11%	16%	10%	11%	11%
None of these reasons	1%	2%	0	0	1%

Reasons for Visiting Derry~Londonderry  
[ Base: All Derry~Londonderry respondents n=396]

**Reasons for Visiting The Causeway Coast & Glens:** Again the draw of a very popular attraction such as the Giants Causeway is obvious, especially amongst visitors from outside of NI. Not surprisingly these visitors also want to discover or explore somewhere new. Compared to other regions out-of-state visitors were less likely to be visiting this region to see friends or relatives. Many NI residents and / or those who were staying over in the region had been before and wanted to return.

Interview Destination →	The Causeway Coast & Glens n=424	NI Residents n=172	OOS n=252	Stayed over in Destination n=134	Day trip only to Destination n=290
To visit a specific attraction	45%	36%	52%	40%	48%
To discover or explore somewhere new	34%	12%	48%	38%	32%
Been before and wanted to return	25%	38%	16%	31%	22%
To visit a number of different places in the area	30%	19%	38%	40%	26%
To visit a favourite place	15%	19%	13%	18%	14%
To visit friends or relatives	15%	8%	19%	17%	14%
To learn about the area and/or its people	23%	10%	31%	25%	21%
To take part in a particular activity	9%	10%	9%	10%	9%
You are particularly interested in a theme related to this area	11%	3%	16%	13%	10%
To go to a particular festival or event	5%	5%	6%	7%	4%
To enjoy local produce/food	9%	8%	10%	13%	8%
To follow a trail around the area by car	10%	0	17%	13%	9%
To eat out in a particular restaurant	4%	7%	3%	6%	4%
A good deal on overnight accomodation	3%	2%	4%	7%	1%
To stay in a particular accomodation establishment	1%	2%	0	2%	*
Other	11%	13%	10%	11%	11%
None of these reasons	1%	1%	1%	1%	1%

Reasons for Visiting The Causeway Coast & Glens  
 [ Base: All Causeway Coast & Glens respondents n=424 ]

**Reasons for Visiting Lough Neagh and Surrounding Area:** As seen for many other regions, those visiting from outside NI were most likely to be wanting to discover or explore somewhere new as well as visiting a specific attraction and learning about the area. Nearly half of out-of-state visitors to this area were also visiting friends and relatives.

Interview Destination →	Lough Neagh and surrounding n=478	NI Residents n=385	OOS n=93	Stayed over in Destination n=82	Day trip only to Destination n=396
To visit a specific attraction	48%	47%	51%	33%	51%
To discover or explore somewhere new	22%	17%	43%	38%	19%
Been before and wanted to return	30%	32%	22%	29%	30%
To visit a number of different places in the area	12%	8%	32%	16%	12%
To visit a favourite place	27%	28%	20%	15%	29%
To visit friends or relatives	13%	5%	46%	29%	10%
To learn about the area and/or its people	9%	5%	27%	7%	10%
To take part in a particular activity	18%	18%	14%	20%	17%
You are particularly interested in a theme related to this area	5%	4%	5%	6%	4%
To go to a particular festival or event	6%	5%	8%	6%	6%
To enjoy local produce/food	5%	4%	10%	6%	5%
To follow a trail around the area by car	3%	3%	5%	4%	3%
To eat out in a particular restaurant	5%	6%	2%	5%	5%
A good deal on overnight accomodation	2%	2%	1%	10%	*
To stay in a particular accomodation establishment	3%	4%	0	15%	1%
Other	10%	9%	14%	20%	8%
None of these reasons	1%	1%	0	1%	1%

Reasons for Visiting Lough Neagh & Surrounding area  
[ Base: All Lough Neagh respondents n=478]

**Total motivations for taking trip in Northern Ireland:** Of course people often take trips for a number of reasons, so when other secondary, be nonetheless important, reasons are included, around half or more of visitors to most areas (with the not unsurprising exceptions of visitors to Belfast, Armagh and Derry/Londonderry ) cited wanting to escape the normal routine; this was particularly significant amongst visitors to the Mournes and Tyrone & Sperrins. Just deciding to take advantage of a good deal as a bit of a treat was high on the list for visitors to Fermanagh while visitors to Derry/Londonderry were wanting to get together with family.

Interview Destination →	Greater Belfast N=362	Strangford N=193	The Mournes N=265	Armagh N=169	Fermanagh N=210	Tyrone & Sperrins N=223	Derry-London - Derry N=188	The Causeway Coast & Glens N=222	Lough Neagh and surrounding N=403
I/we wanted to escape from the normal routine and enjoy exploring the landscape and rural surroundings, local attractions and authentic pubs and cafes	31%	44%	54%	33%	48%	54%	21%	41%	47%
I/we wanted loads to do for my children that will keep them entertained and I/we get to spend quality time with them	46%	45%	38%	72%	26%	33%	6%	32%	42%
I/we wanted to focus on spending quality time as a couple and it's all about enjoying our time together	15%	24%	24%	24%	26%	20%	23%	18%	18%
I/we wanted to get away to socialize with friends and/or other couples for a bit of fun and relaxation, good food and maybe take in some sights or attractions and entertainment or an activity we enjoy	13%	18%	9%	3%	20%	9%	9%	11%	12%
I/we just decided to book a trip as a bit of a treat/change of scenery and wanted a good deal and nice accommodation	10%	3%	11%	8%	27%	14%	4%	12%	7%
I/we wanted to get together with or visit family or attend a family celebration or event	9%	5%	6%	12%	12%	10%	24%	8%	6%
I/we just needed to get away from the children for a break and enjoy being ourselves again	3%	1%	7%	2%	5%	6%	4%	5%	2%
I/we wanted activity packed days followed by fun nights taking in the city nightlife, pubs and clubs	5%	3%	6%	3%	5%	4%	1%	5%	2%
I/we wanted to indulge in a luxury break, in luxury accommodation and fine dining	4%	1%	2%	1%	14%	2%	2%	2%	1%
Other	7%	13%	8%	7%	3%	6%	36%	27%	4%

Total motivations for taking trip in Northern Ireland  
[ Base: All NI or ROI Residents n=2029]

# Planning the Trip

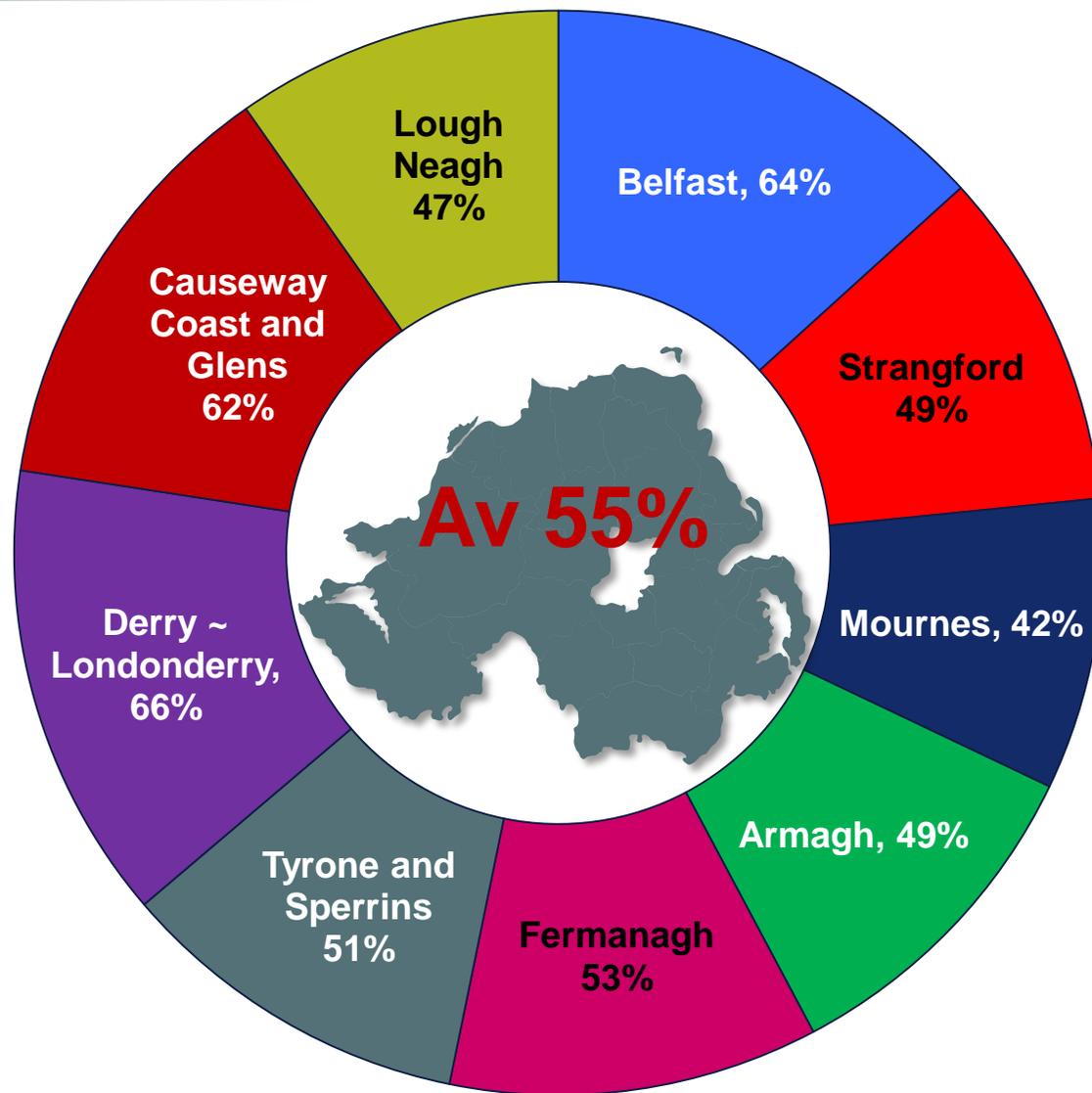
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**First Overnight Trip to Northern Ireland (in last 5 years) OOS Residents:** Over half of those from outside NI were on their first overnight trip to Northern Ireland. Not surprisingly those staying over in Belfast, Causeway Coast & Glens or Derry/Londonderry were even more likely to be on their first overnight trip whereas those staying in the Mournes were more likely to have been to stay in Northern Ireland before.



**Q.2 First overnight trip in last 5 years**  
[ Base: All OOS who stayed overnight at all in Destination  $n=985$  ]

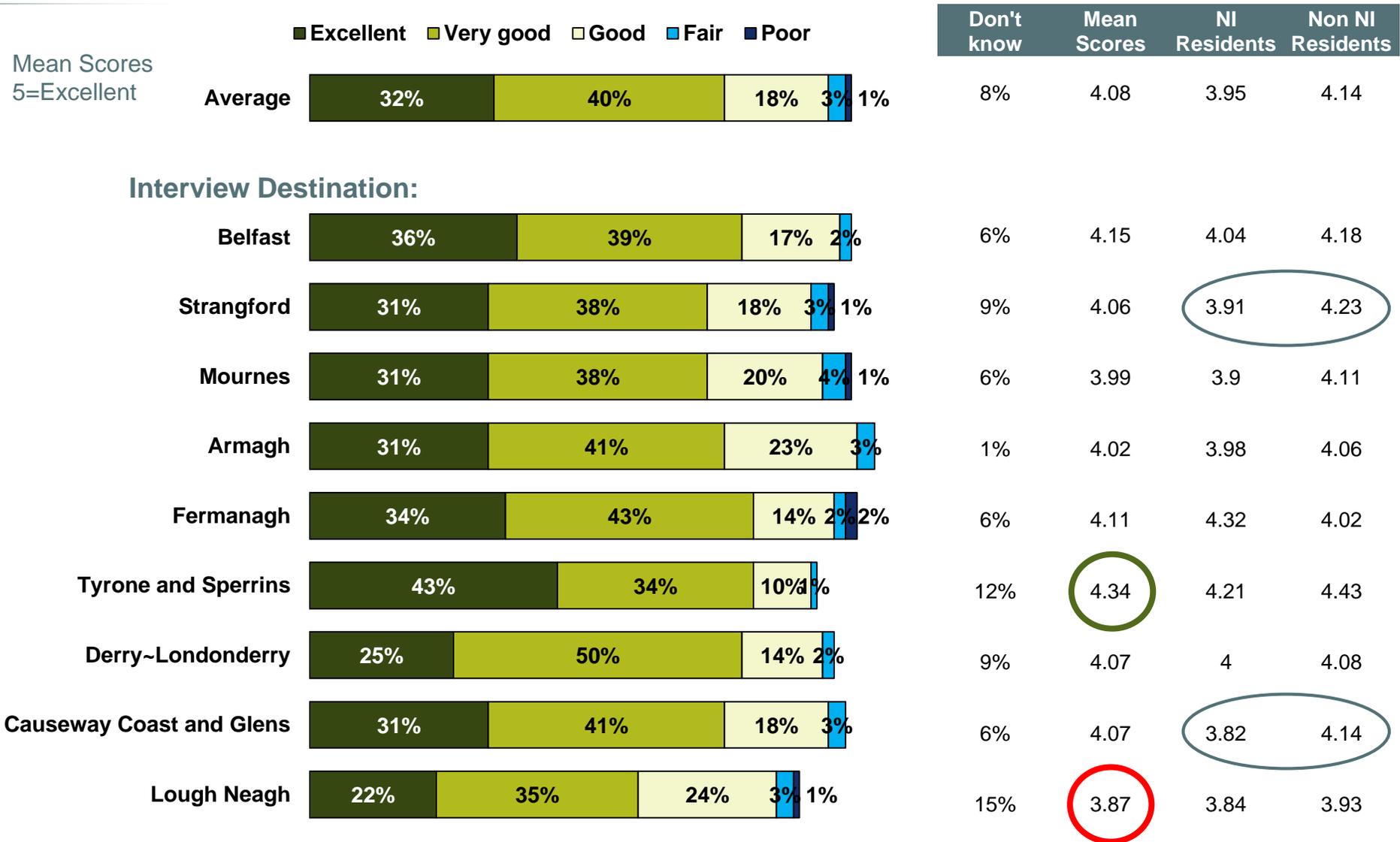
Sources of Information used in planning trip: Visitors to areas such as Strangford, Mournes and Lough Neagh were more likely to have been NI residents and as such are more reliant on previous experience. Visitors to the Causeway Coast area were more likely than those to other areas to have consulted a wider range of other sources of information as well as previous experience and recommendations from family and friends

Interview destination →	Average n=1796	Belfast n=290	Strangford n=184	Mournes n=194	Armagh n=99	Fermanagh n=124	Tyrone & Sperrins n=140	Derry/Lond onderry n=177	Causeway Coast & Glens n=410	Lough Neagh Area n=178
Previous experience	40%	28%	52%	52%	40%	31%	42%	31%	33%	67%
Recommendations from friends and relatives	40%	47%	34%	39%	37%	41%	41%	43%	40%	33%
Northern Ireland Tourist Board website	22%	21%	22%	24%	24%	23%	18%	23%	26%	12%
Tripadvisor	21%	24%	15%	18%	18%	17%	14%	25%	29%	8%
Guide books	18%	17%	16%	10%	16%	19%	11%	33%	25%	8%
Tourism Ireland website	17%	14%	15%	11%	19%	19%	10%	24%	25%	6%
Other websites/ the Internet	12%	12%	8%	12%	18%	9%	14%	14%	12%	10%
Brochure	9%	8%	11%	7%	5%	12%	6%	12%	12%	6%
Newspaper/ magazine articles	6%	6%	6%	8%	2%	6%	6%	5%	8%	4%
Travel agent	6%	7%	3%	1%	3%	10%	6%	12%	8%	1%
App on mobile phone	3%	2%	3%	4%	2%	0	2%	4%	6%	3%
National Trust	1%	0	8%	0	2%	1%	1%	0	*	2%
Tourist information offices	1%	1%	1%	1%	2%	0	1%	1%	2%	1%
Other sources	6%	4%	5%	7%	6%	7%	8%	7%	7%	5%
None of these	5%	5%	5%	6%	5%	6%	7%	5%	3%	4%

Q.3 Sources of information used when planning trip

[ Base: All respondents n=1796 ]

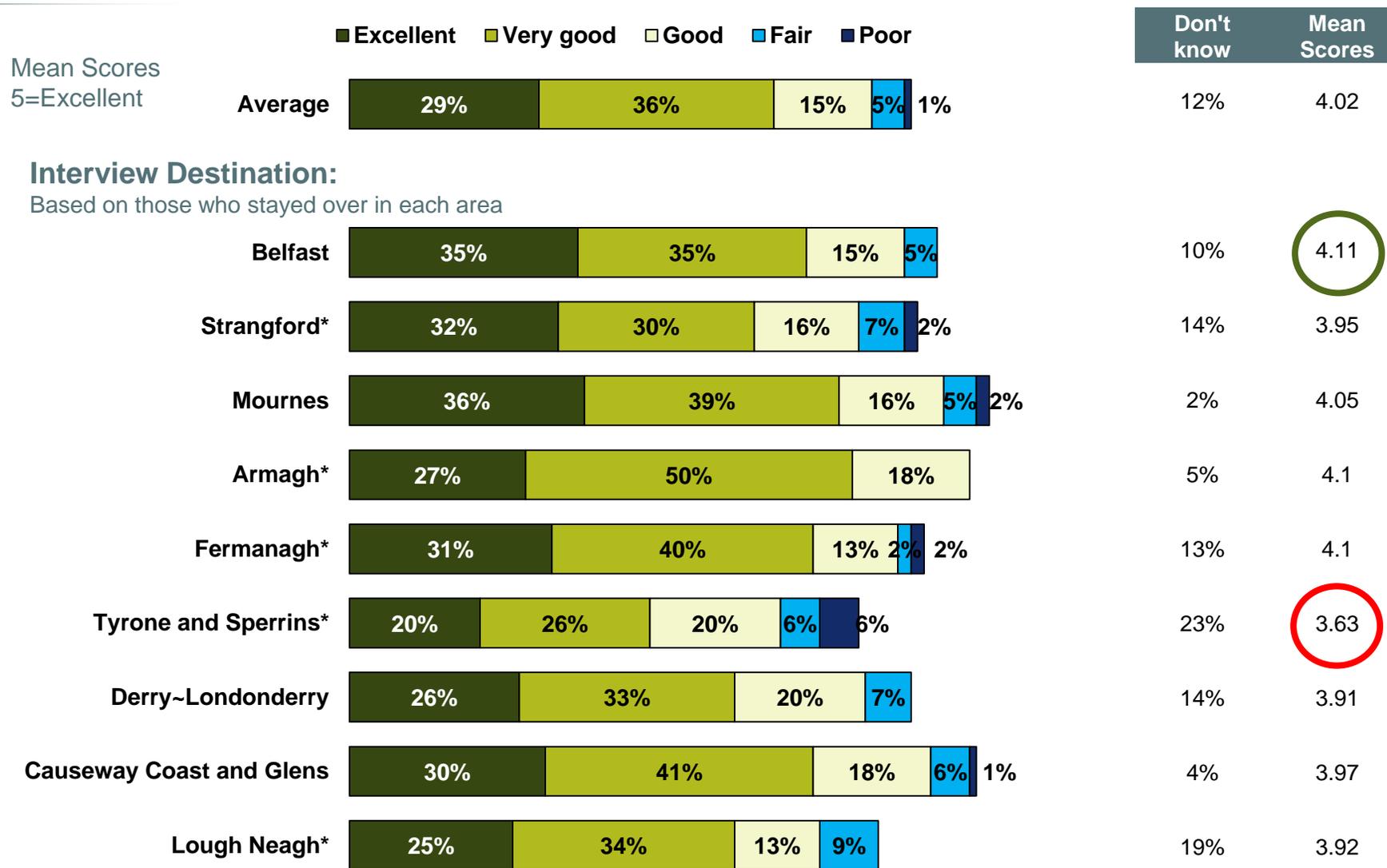
Rating - Availability of useful information to help plan trip: With an average of over 4 across all destinations, rating of the availability of useful information at the trip planning stage was an attribute that was comparatively highly scored. However there was a notable difference in attitudes amongst visitors to different regions, with visitors (both NI and OOS) to the Tyrone and Sperrins area scoring more highly, over two fifths (43%) of visitors rating the availability of information as 'excellent', possibly dominated by a strong offering by the Ulster American Folk Park. OOS visitors tended to score most regions better than domestic visitors.



Q4a Rating of availability of useful information to help plan trip

[ Base: All respondents n=1796 ]

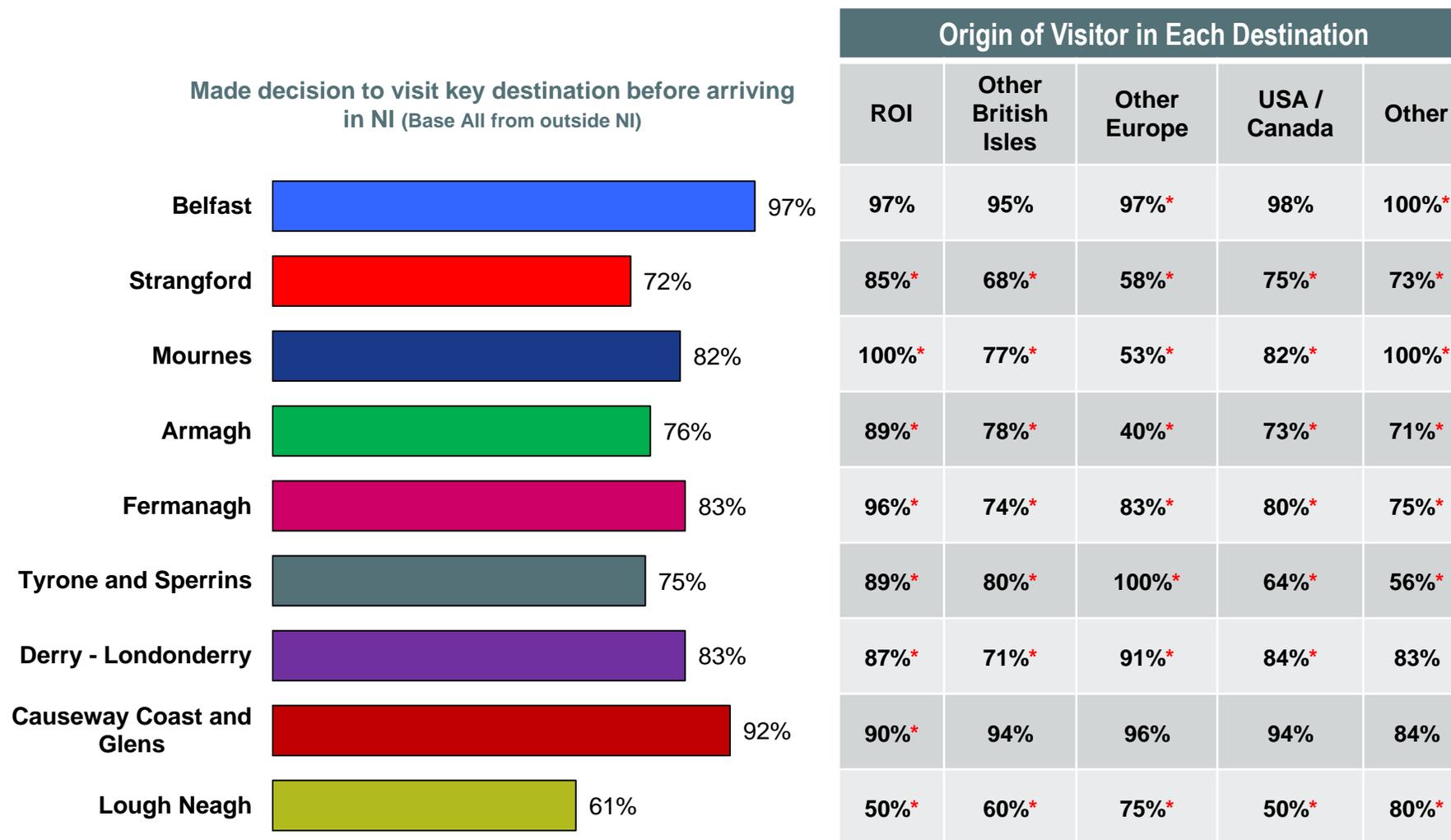
Rating - Ease of finding suitable accommodation: Visitors to Belfast, Fermanagh and Armagh (caution low bases) appeared to be most impressed with the ease of finding suitable accommodation, all scoring much better than regions such as Tyrone & Sperrins. Again this attribute was reasonably highly rated overall. Excluding those who relied on previous experience only or those who relied on either previous experience or recommendations from family and friends only changed the mean scores only very marginally or not at all in most cases.



Q4b Rating of ease of finding suitable accommodation

[ Base: All who stayed in paid for accommodation in destination n=977 ] \* Low Bases

Timing of decision to visit key destination: Almost all visitors to the Greater Belfast and the Causeway Coast & Glens areas from outside NI had decided to include these areas in their trip before they arrived in Northern Ireland, not surprising since these areas are home to some of Northern Ireland's key attractions.



Q.7 Made decision to visit Interview Destination before arriving in NI

[ Base: All respondents from outside NI n=1161 ] Figures based on origin of visitor in each area - bases vary \* Low Bases

# Arriving and Transport

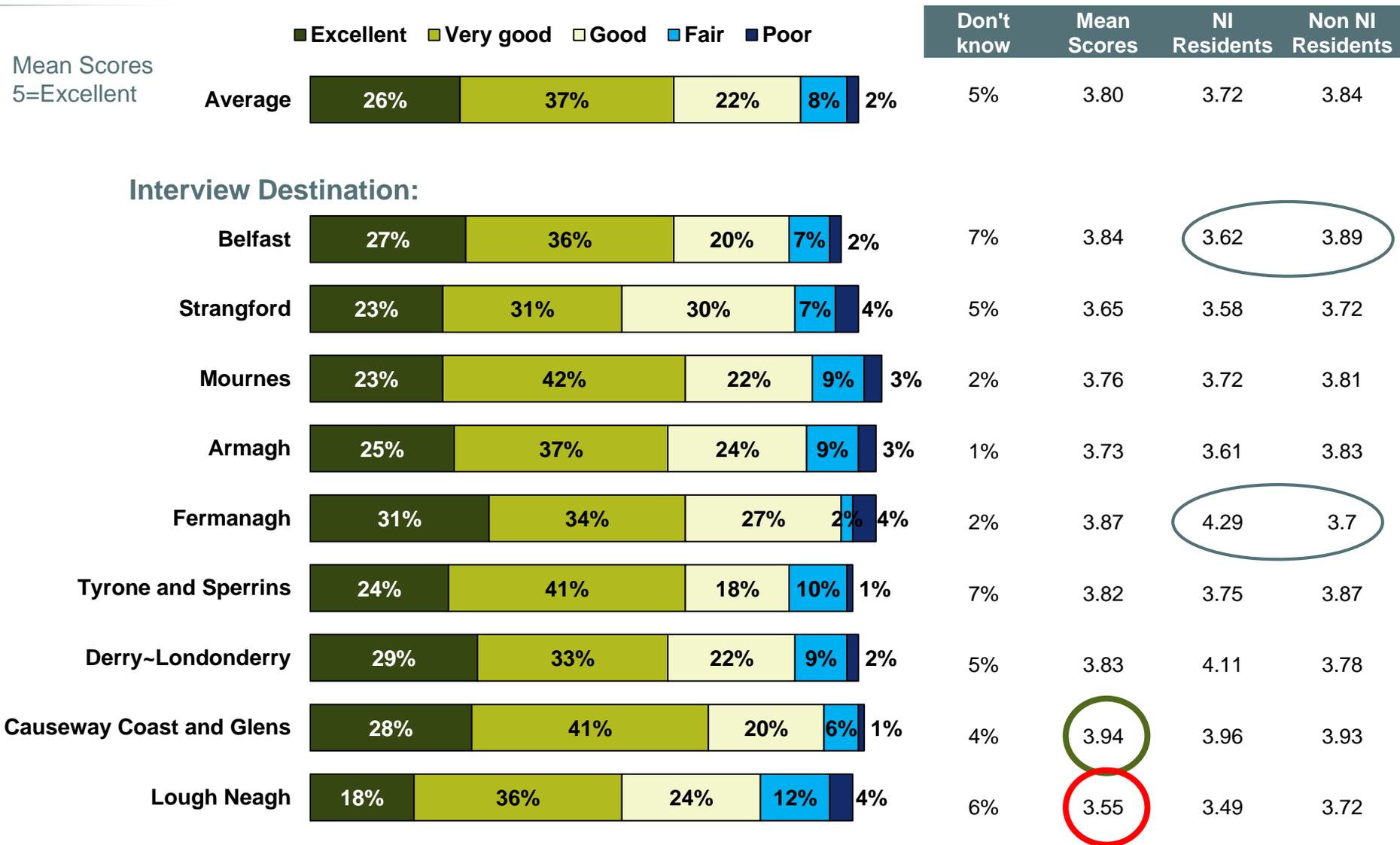
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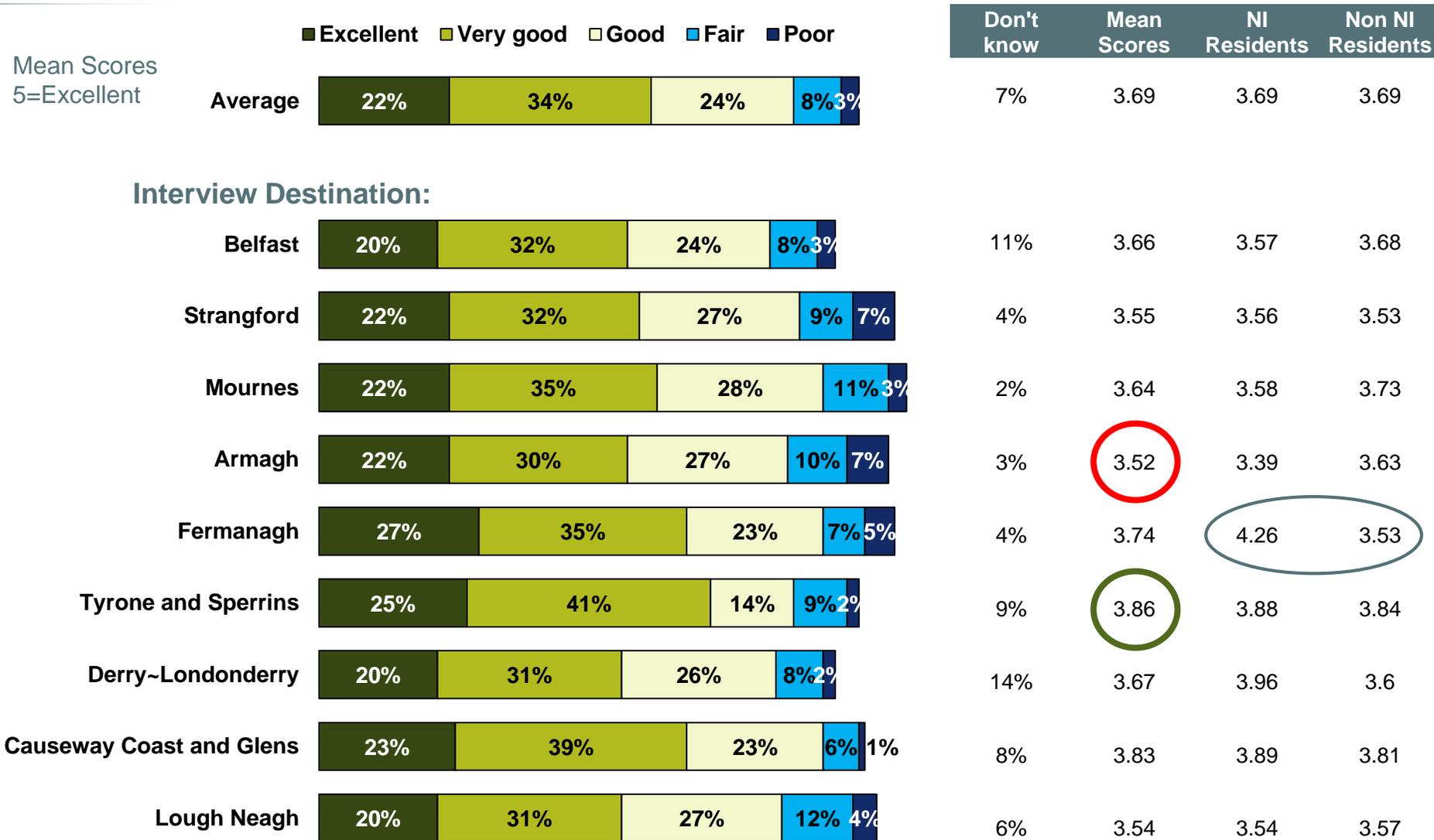


Rating - signs that help find interesting / key tourist locations: With an overall average score of 3.8, this attribute was in the bottom half in terms of relative performance, with OOS visitors scoring this marginally better. Visitors to the Causeway Coast and Glens area rated the signs that help find interesting or key tourist locations highest but considering this is home to one of NI's stand out attractions, even this could be improved upon. The score for Lough Neagh was especially less than ideal particularly amongst domestic visitors.



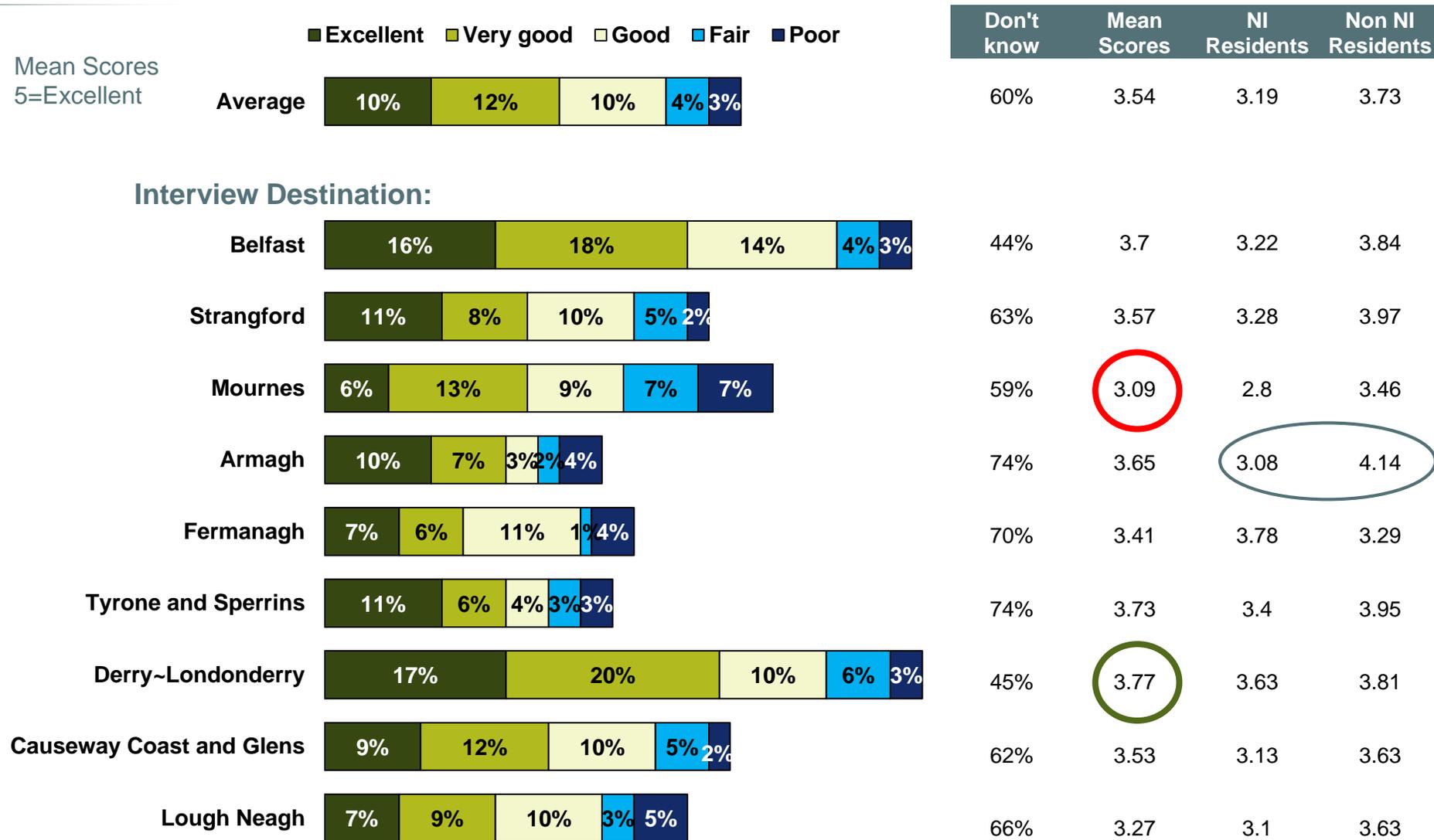
Q10a Rating of signs that help you find interesting / key tourist locations  
 [ Base: All respondents n=1796 ]

Rating - road signs that help find your way around: Overall ratings for road signs were even lower and were even less favourable across many areas amongst OOS visitors. Visitors to the Tyrone and Sperrins and the Causeway Coast and Glens area did rate this attribute a little better but still under 4 on average (between good and very good).

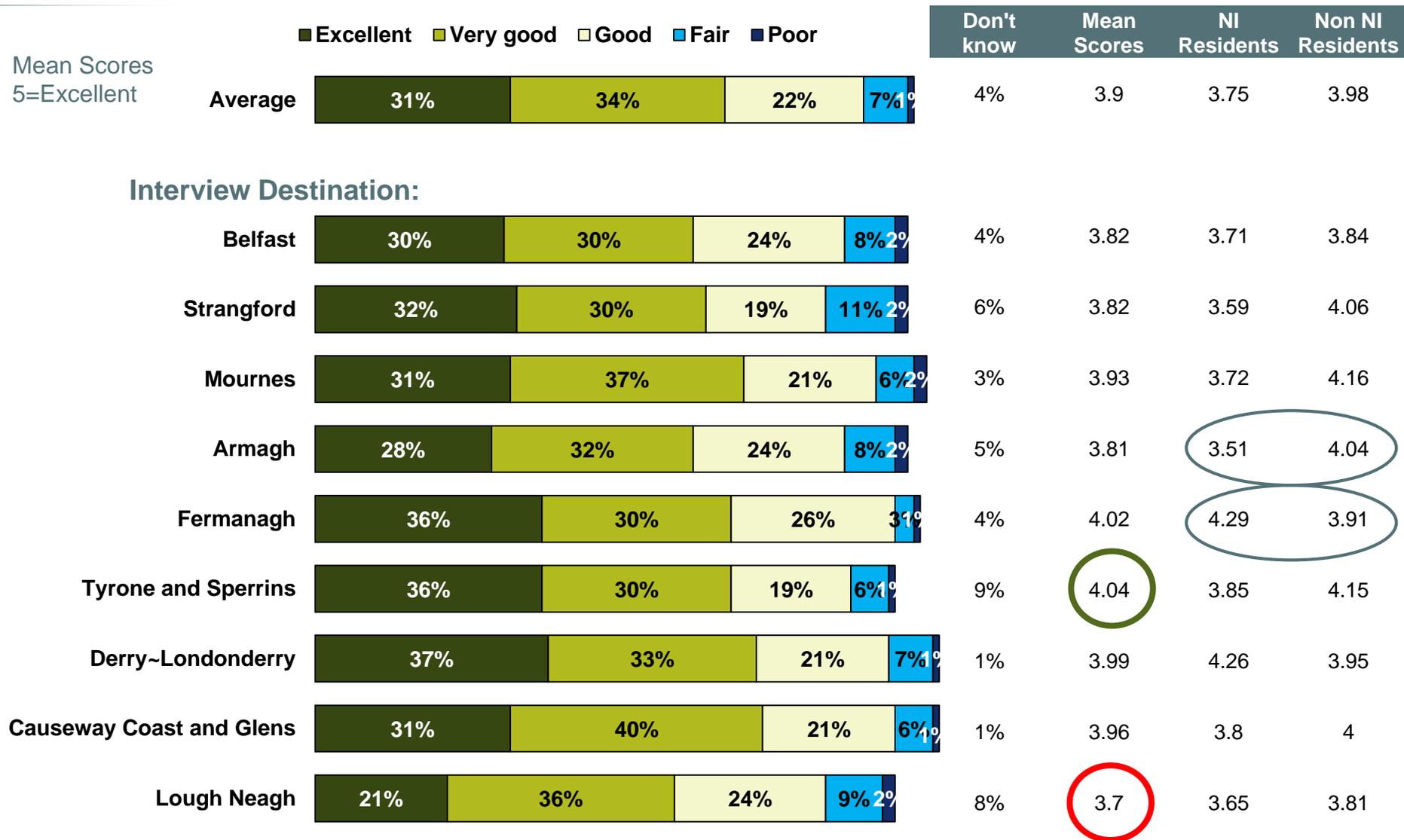


Q10b Rating of road signs that help you find your way around  
 [ Base: All respondents n=1796 ]

**Rating - Availability, service and value for money of public transport:** High levels of 'Don't know' responses suggest many did not avail of public transport or none was available, this is particularly prominent among visitors to the Armagh, Tyrone and Sperrins, and not surprisingly lowest in Greater Belfast and Derry-Londonderry. For those who did have an opinion, overall performance was comparatively less favourable than for other attributes. Visitors from the Derry-Londonderry area rated the services most favourably in terms of availability, value for money and overall service, although even in this region the mean score was well below 4 (very good).



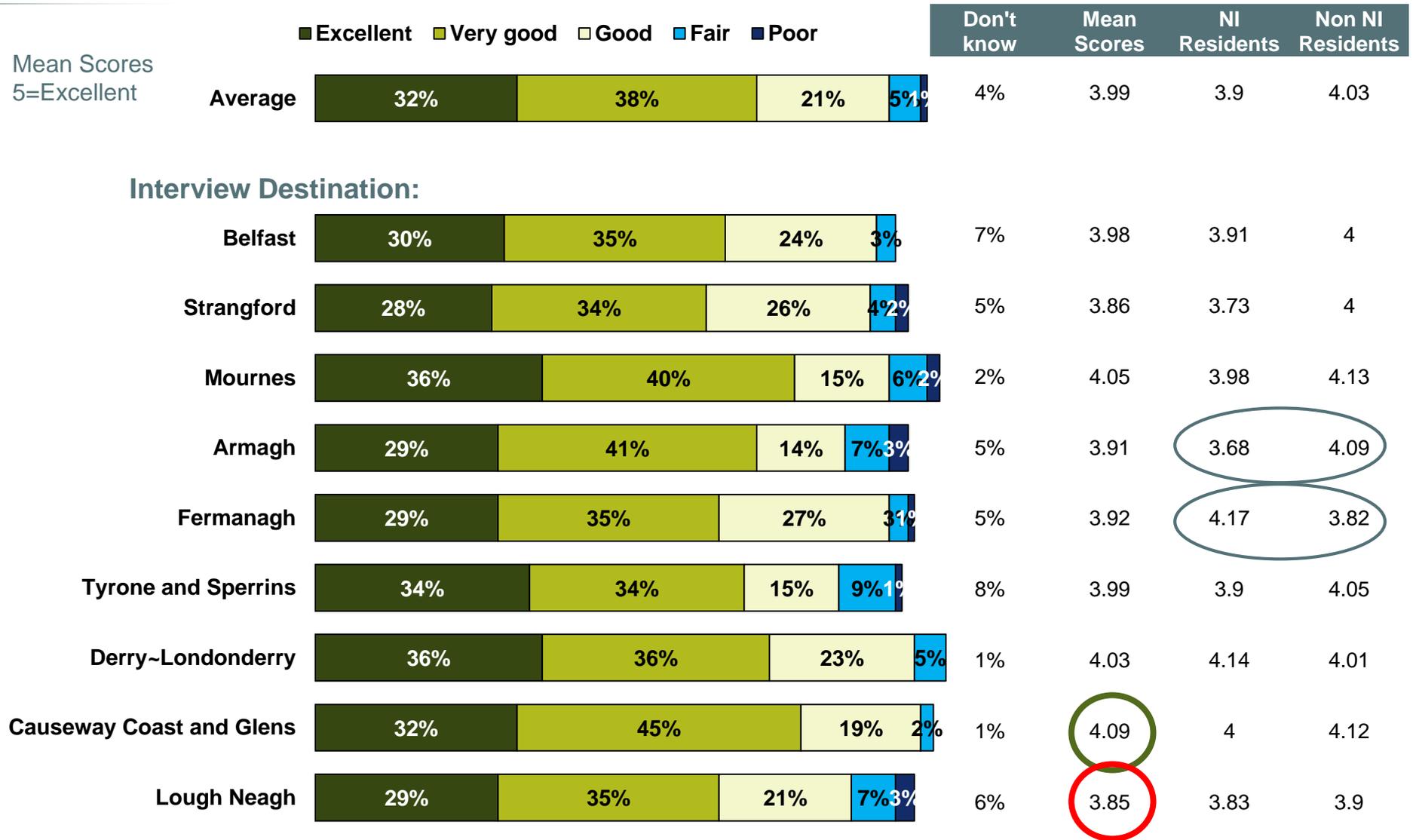
Rating - feeling of being welcomed when you arrive in chosen destination: In overall terms rating of this attribute at 3.9 (almost very good) lay around the middle. Nevertheless Northern Ireland is often renowned for its friendliness so it is vital that this includes the welcome and first impression, which is generally much more positive amongst OOS visitors than for NI residents.



Q10f Rating of a feeling of being welcomed when you arrive in chosen destination

[ Base: All respondents n=1796 ]

**Rating - sense of the place on arrival at destination:** This attribute was similarly scored as very good on average, with around a third rating the sense of the place on arrival as excellent. Visitors to the Causeway Coast and Glens area gave the highest ratings for their first impressions of the area when they first arrived, closely followed by visitors to the Mournes and Derry-Londonderry. Again OOS visitors were generally more positive than visitors from NI.



Q10g Rating of the sense place you are visiting when you arrived at Interview Destination  
[ Base: All respondents n=1796 ]

# Eating Out

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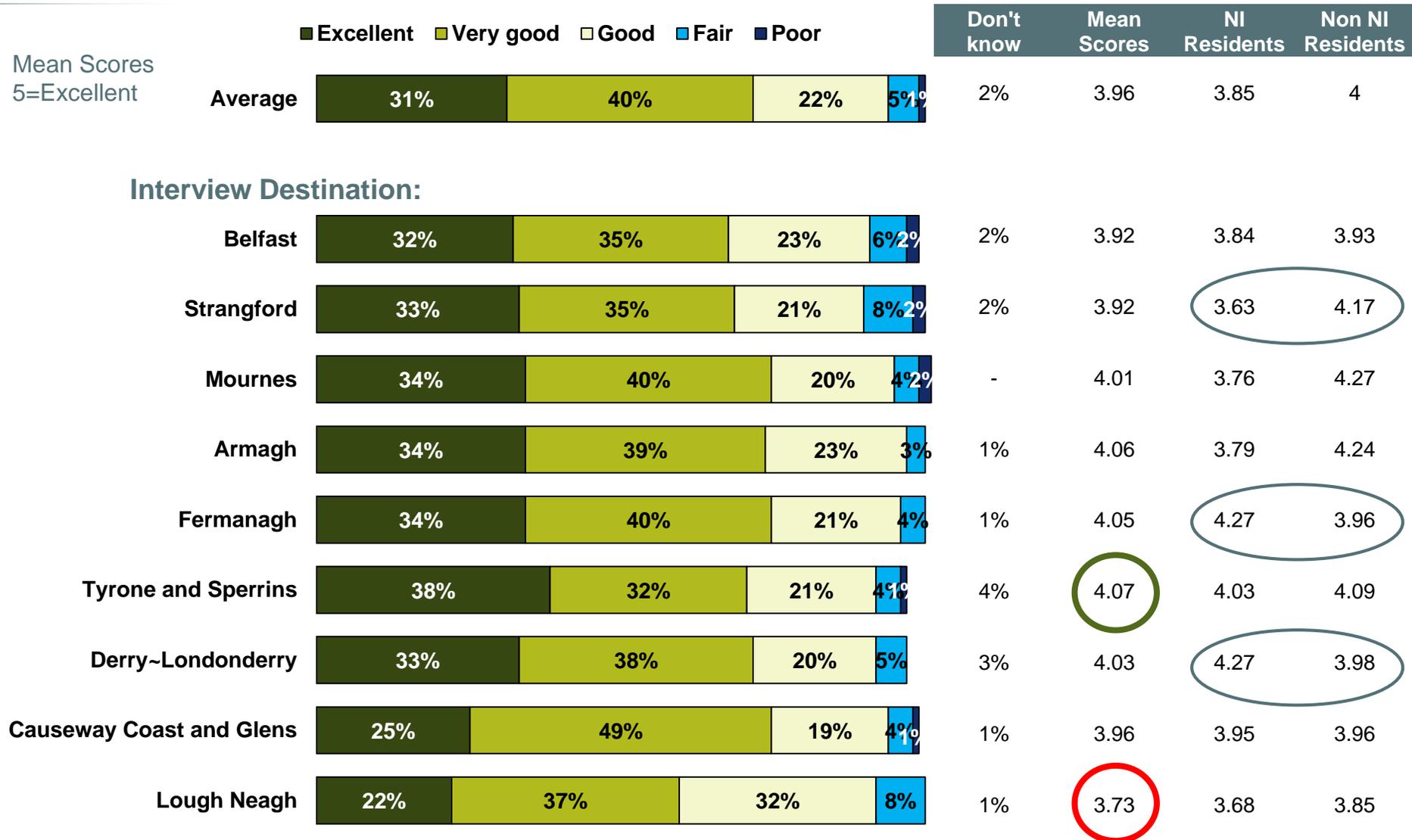
Places ate in destination: Visitors to Lough Neagh and Fermanagh were slightly more likely than others to have eaten in a Café, while pubs or bars were more likely to have been frequented by those visiting Belfast, Causeway Coast, Derry/Londonderry as well as Fermanagh. Visitors to Belfast and the Causeway Coast were more likely than others to have eaten in a hotel, Brasserie or Bistro or a Fine dining restaurant. The choice of places to eat will obviously be highly dictated by the availability of types of places in each area and whether or not they were staying overnight or visiting as part of a tour group.

Interview Destination →	Greater Belfast n=290	Strangford n=184	The Mournes n=194	Armagh N=99	Fermanagh n=124	Tyrone & Sperrins n=140	Derry-London-Derry n=177	The Causeway Coast & Glens n=410	Lough Neagh and surrounding area n=178
Cafés	47%	40%	49%	49%	51%	44%	49%	46%	58%
Pub or bars	45%	29%	30%	17%	40%	25%	43%	46%	22%
Hotels	30%	18%	21%	14%	18%	21%	21%	31%	14%
Fast food / takeaways	19%	12%	27%	13%	13%	11%	20%	24%	9%
Brasseries and bistros	27%	10%	16%	10%	10%	4%	12%	20%	7%
Fine dining restaurants	19%	10%	16%	7%	13%	9%	13%	16%	7%
At a friend or relatives home	11%	4%	19%	14%	10%	7%	10%	9%	10%
Self catered / picnic	2%	7%	9%	4%	3%	6%	2%	3%	4%
Other	1%	1%	0	1%	3%	1%	7%	3%	1%
None	7%	25%	15%	23%	13%	19%	6%	9%	14%

Q.11 Places ate in Interview Destination

[ Base: All respondents n=1796 ]

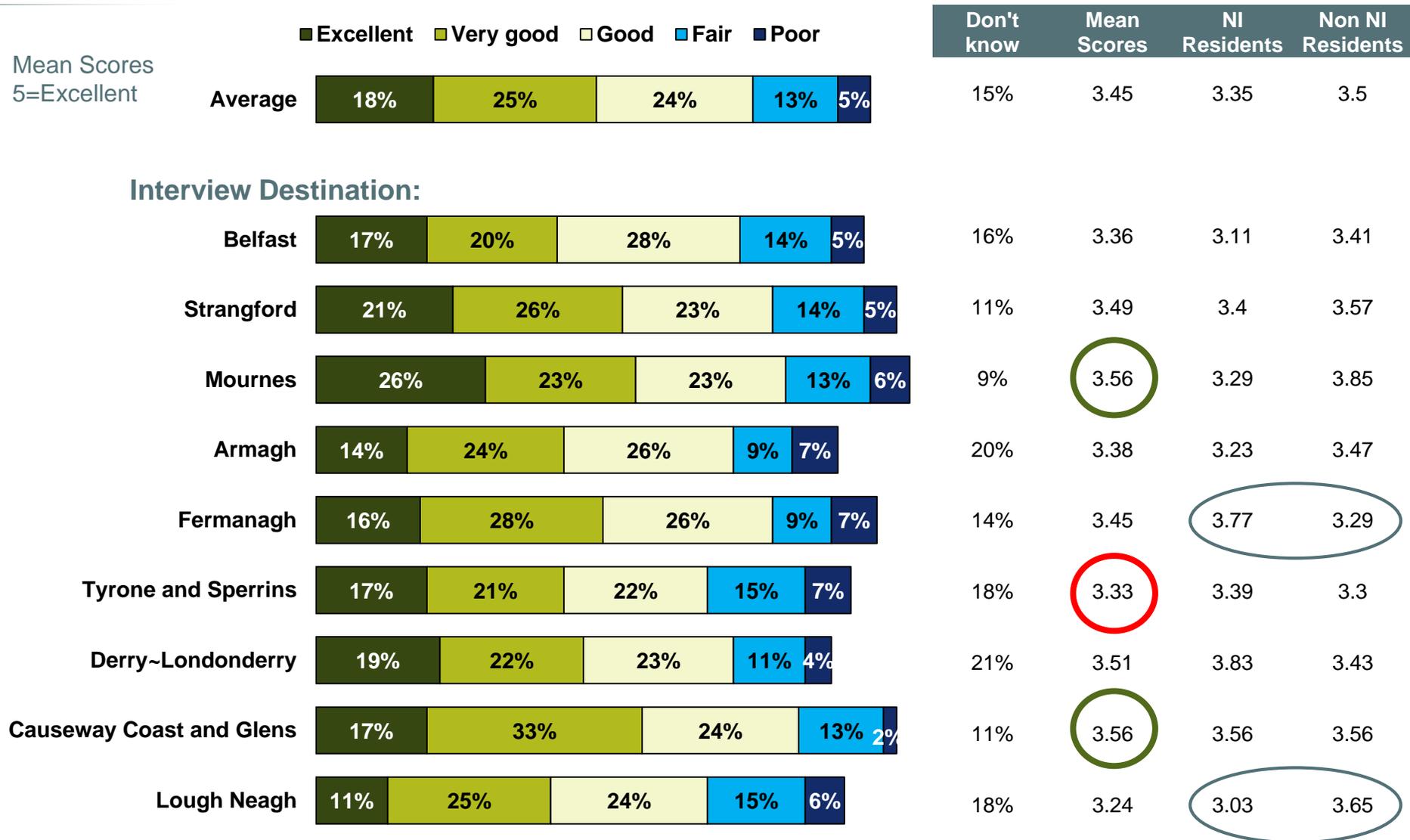
Rating - receiving a friendly and efficient service: Attributes surrounding eating out in Northern Ireland tend to be rated less positively. However out of them all, this is the one attribute that is rated most highly at just under 4 overall, suggesting that the friendliness of the people of Northern Ireland has some bearing on this. Armagh, Fermanagh, Tyrone & Sperrins and Derry-Londonderry were all rated marginally better than others and with the exception of Fermanagh and Derry-Londonderry (both places rated very highly by NI visitors), OOS visitors did tend to rate this more highly.



Q12a Rating of friendly and efficient service

[ Base: All who ate out n=1507 ]

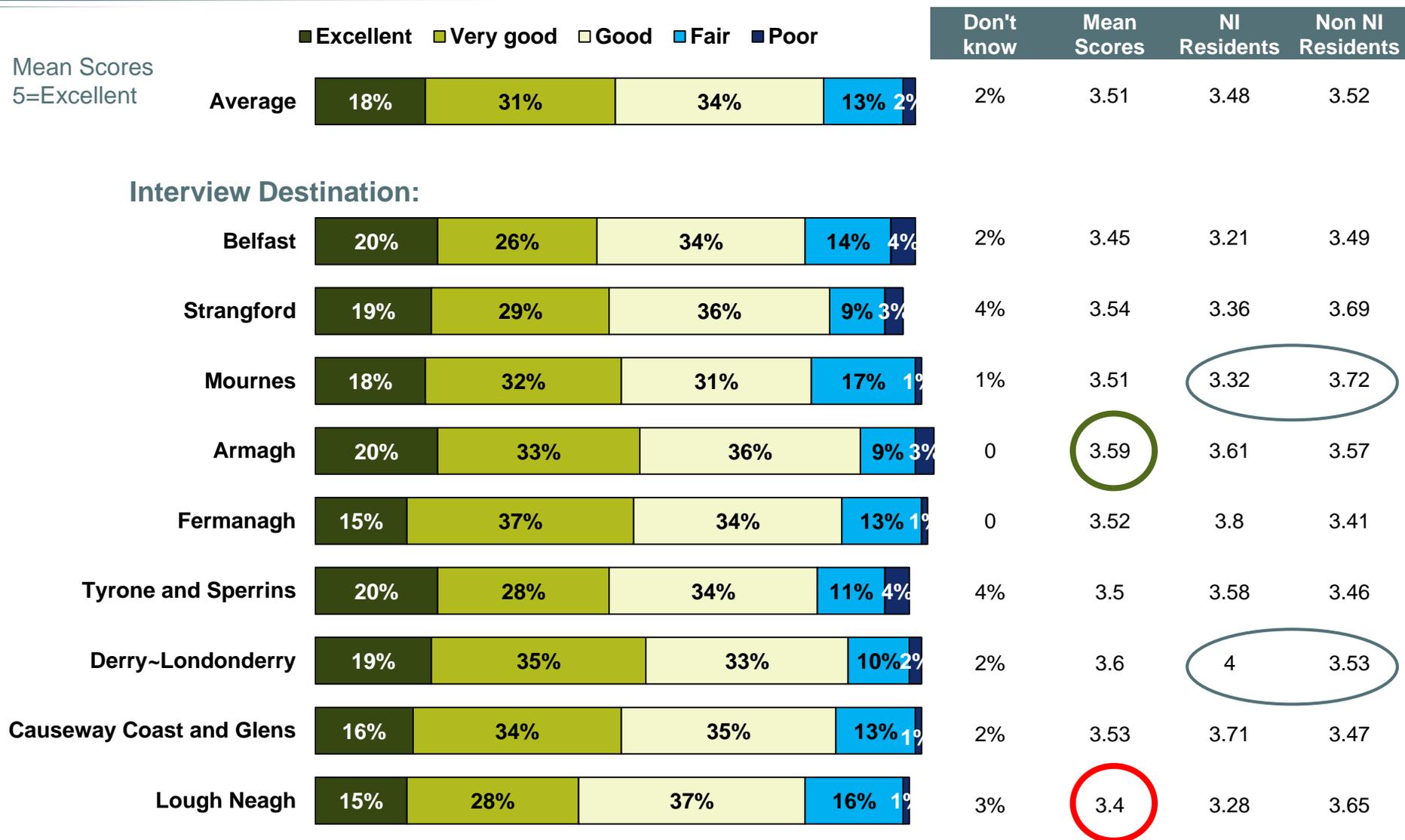
Rating - Menus demonstrated the use of locally sourced ingredients: However, as seen previously, other attributes, and this is one in particular, are not so highly rated. Whether the offering in terms of using locally sourced ingredients is really not particularly good, or whether as is more likely, the use of these ingredients is just not promoted well needs to be examined. And while visitors from outside Northern Ireland were generally more impressed with this aspect of the service, overall scores are generally closer to 'good' than 'very good' with only around 1 in 6 or so rating this as excellent.



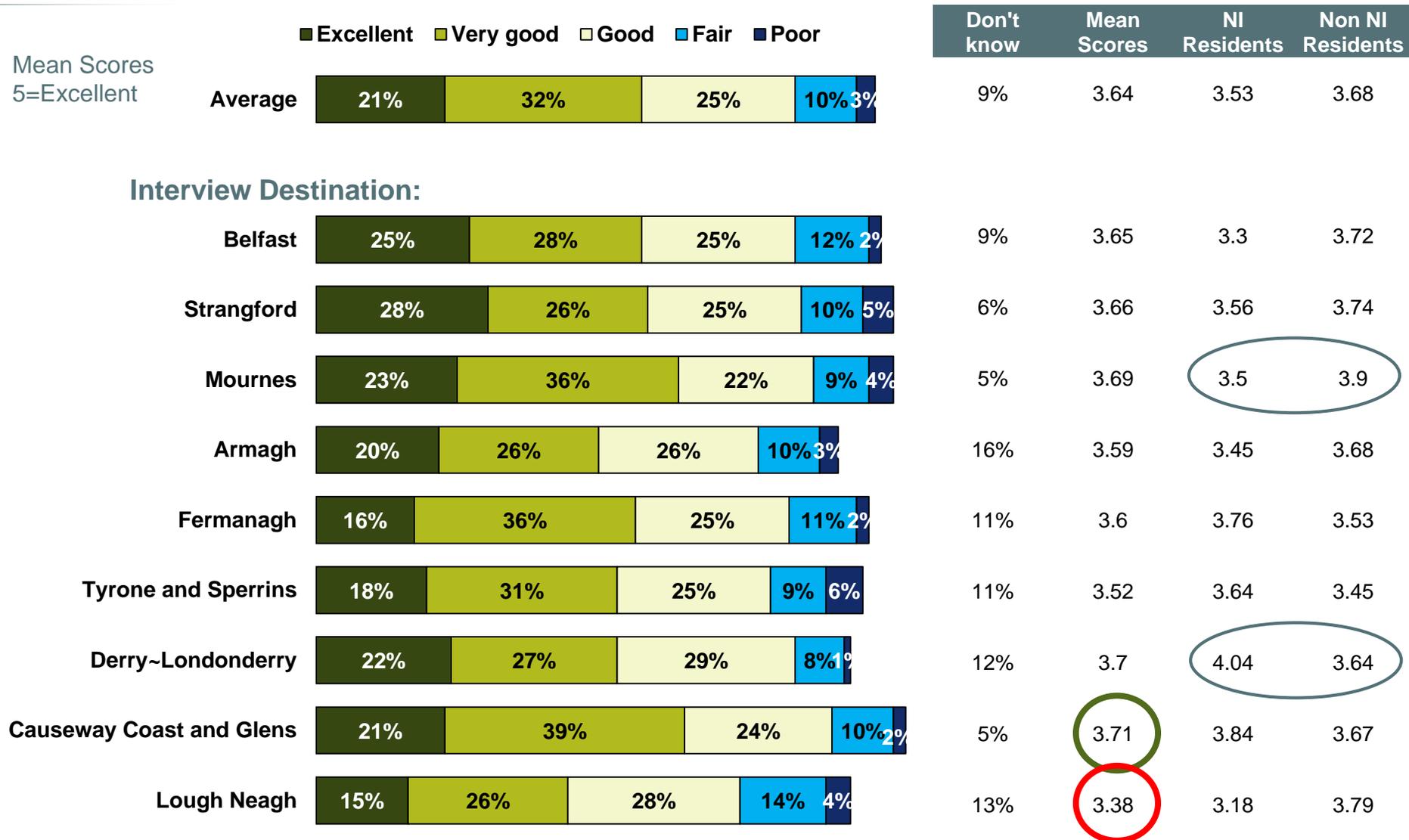
Q12b Rating of menus demonstrate the use of locally sourced ingredients

[ Base: All who ate out n=1507 ]

**Rating - Value for money:** Rating of eating out in terms of value for money was similarly relatively poorly rated, with no one destination standing out as being any better or worse compared to the others. Overall NI and OOS visitors rated value for money similarly but there were some marked differences across the regions, with OOS more likely to rate value for money better in Belfast, Strangford, the Mournes and Lough Neagh but less likely in Fermanagh, Derry-Londonderry and the Causeway Coast.



Rating - Opportunities to experience good, local food and drink: This attribute was marginally more positively rated, although still well below 4 and well down in terms of relative performance. Derry-Londonderry stood out somewhat in terms of a more positive rating amongst NI residents (over 4), with Fermanagh, Tyrone & Sperrins, and Causeway Coast also being rated better by domestic visitors while the other regions were all more highly rated amongst OOS visitors.

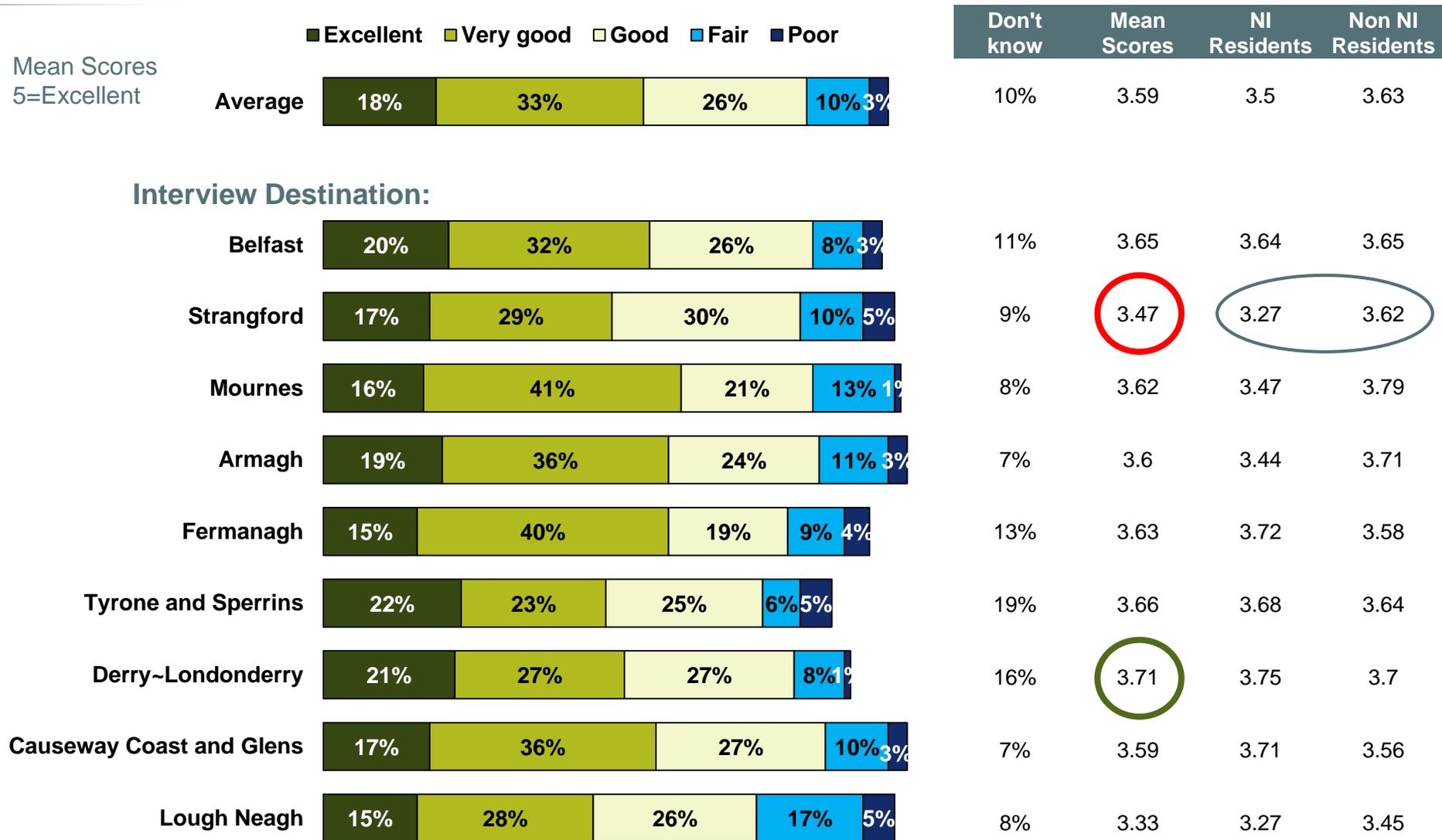


Q12dRating opportunities to experience good, local food and drink

[ Base: All who ate out n=1507 ]



Rating - Availability of places to eat at suitable times of day and night: Similarly, ratings for availability of places to eat when it suits are less than ideal and could benefit from improvement, especially in the Lough Neagh area. However, this is not an attribute for which any destination excels.



Q12f Rating of places to eat available at the times of day and night that suit you  
[ Base: All who ate out n=1507 ]

# Activities & Places Visited

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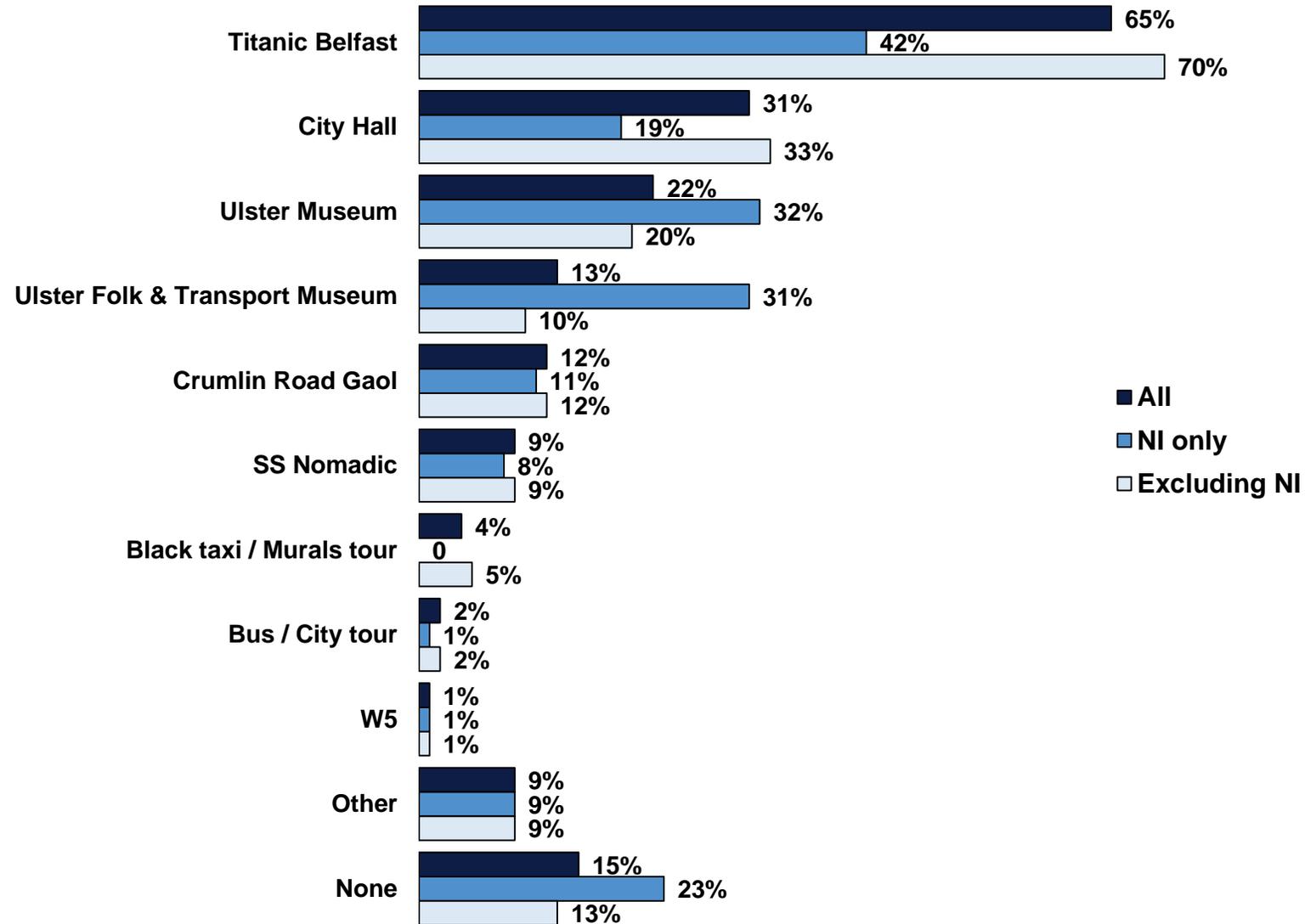
**Activities took part in in destination:** There was however a marked difference in activities participated in across the destinations. Visits to a forest, park or garden were more likely amongst those visiting the Mournes or Lough Neagh; while visits to castles or other historic monuments were more likely amongst visitors to Strangford, Fermanagh and Derry/Londonderry. Visitors to Belfast, Derry/Londonderry and Causeway Coast were more likely than others to visit a pub. Otherwise hiking or walking were more popular in the Mournes and Causeway Coast as was visiting a beach, while museums or art galleries were more likely to be visited by those visiting Belfast or Derry/Londonderry.

Interview Destination →	Greater Belfast n=290	Strangford n=184	The Mournes n=194	Armagh N=99	Fermanagh n=124	Tyrone & Sperrins n=140	Derry-Londonderry n=177	The Causeway Coast & Glens n=410	Lough Neagh and surrounding area n=178
Visited a forest, park or garden	22%	49%	68%	25%	49%	39%	23%	36%	69%
Visited a castle, house or other historic monument	31%	49%	27%	31%	55%	26%	48%	45%	42%
Hiking or walking	18%	32%	71%	17%	35%	19%	28%	52%	43%
Visited a pub	43%	25%	38%	23%	30%	19%	46%	43%	16%
Visited a visitor / interpretation centre	34%	38%	17%	49%	31%	34%	33%	41%	20%
Visited a museum / art gallery	59%	17%	13%	37%	23%	47%	49%	18%	19%
Visited a beach	17%	30%	46%	6%	11%	7%	16%	58%	14%
A guided tour	36%	14%	4%	8%	44%	13%	40%	22%	8%
Attended an event or festival	8%	9%	19%	15%	6%	15%	17%	11%	8%
Cycling	3%	5%	16%	1%	13%	1%	1%	5%	11%
Other outdoor activities	1%	3%	6%	4%	5%	1%	2%	2%	4%
Adventure activities (e.g., canoeing, zorbing, gliding, archery etc.)	1%	2%	6%	3%	3%	1%	1%	3%	3%
Attended a theatre / musical performance	2%	2%	2%	6%	2%	1%	6%	2%	1%
Golfing	1%	1%	3%	1%	2%	3%	1%	4%	1%
Fishing	*	1%	3%	1%	6%	1%	0	1%	2%
Other	6%	4%	3%	8%	3%	1%	6%	3%	5%

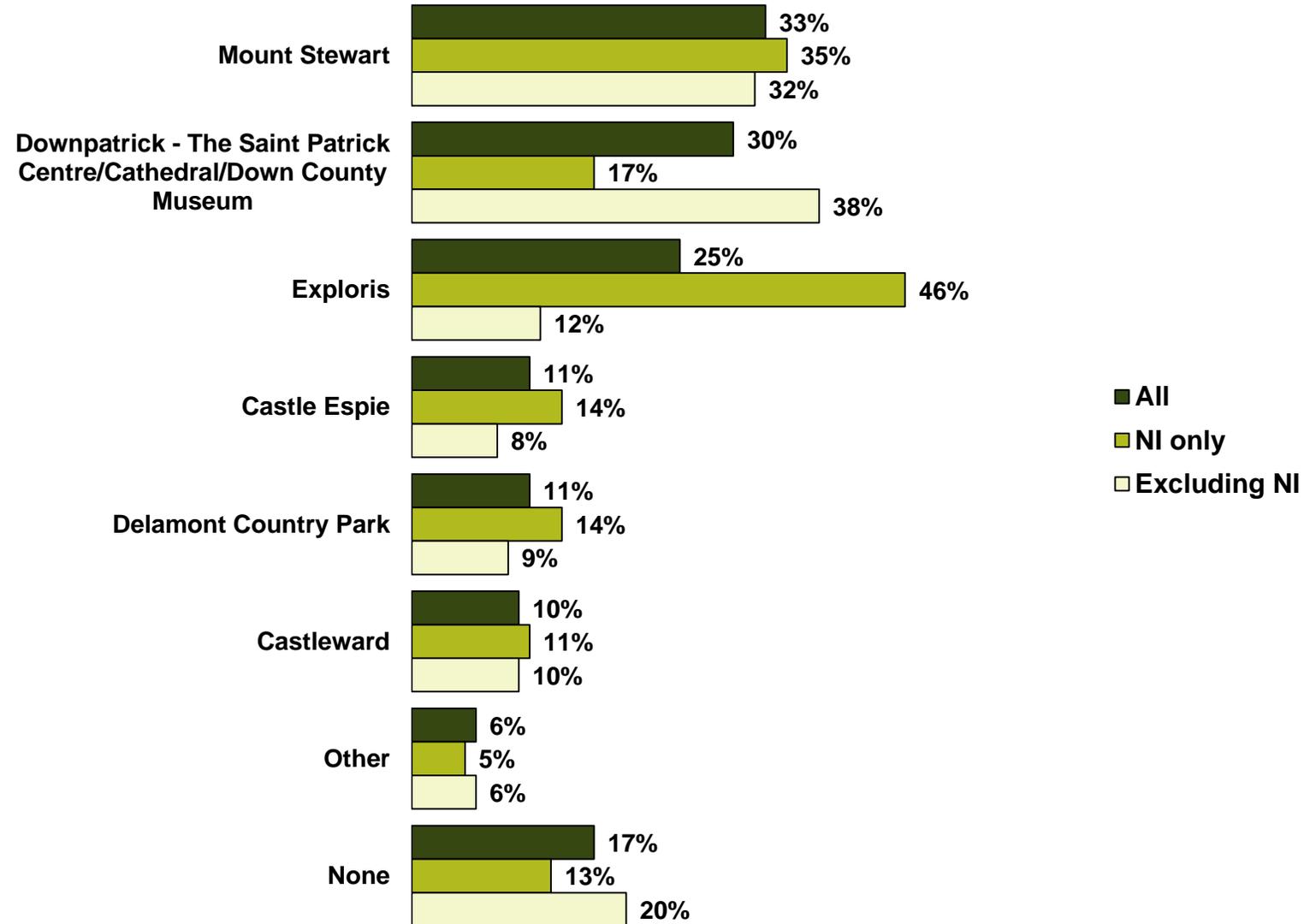
Q.13 Activities took part in in Interview Destination

[ Base: All respondents n=1796 ]

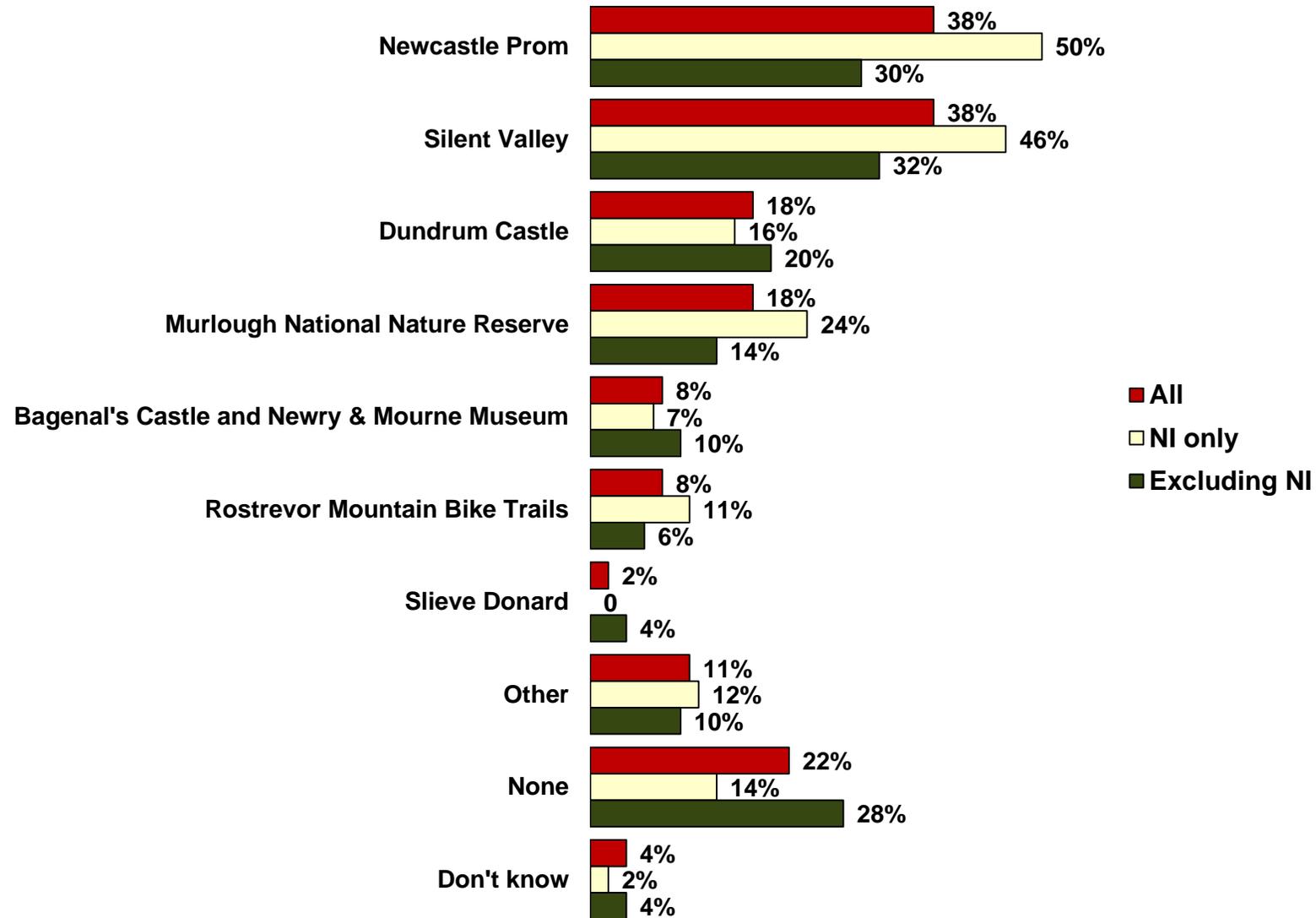
**Places visited in Belfast:** Taking into account that 47% visited Belfast to visit a specific attraction, 41% had children in the party and 34% chose here to find out stories, history and legends of Northern Ireland it is not surprising then that two thirds of all visitors to Belfast (including those interviewed in other regions) visited Titanic Belfast, followed by nearly a third who visited the City Hall. Both of these attractions were much more likely to be visited by those from outside NI, which is expected due to their strong draw in attracting visitors to Northern Ireland. Domestic visitors were more likely visit the Ulster Museum or Ulster Folk & Transport Museum than out-of-state visitors. [It is worth noting again that key attractions were targeted for interviewing and email collection with some destinations having a greater array of popular attractions than others]



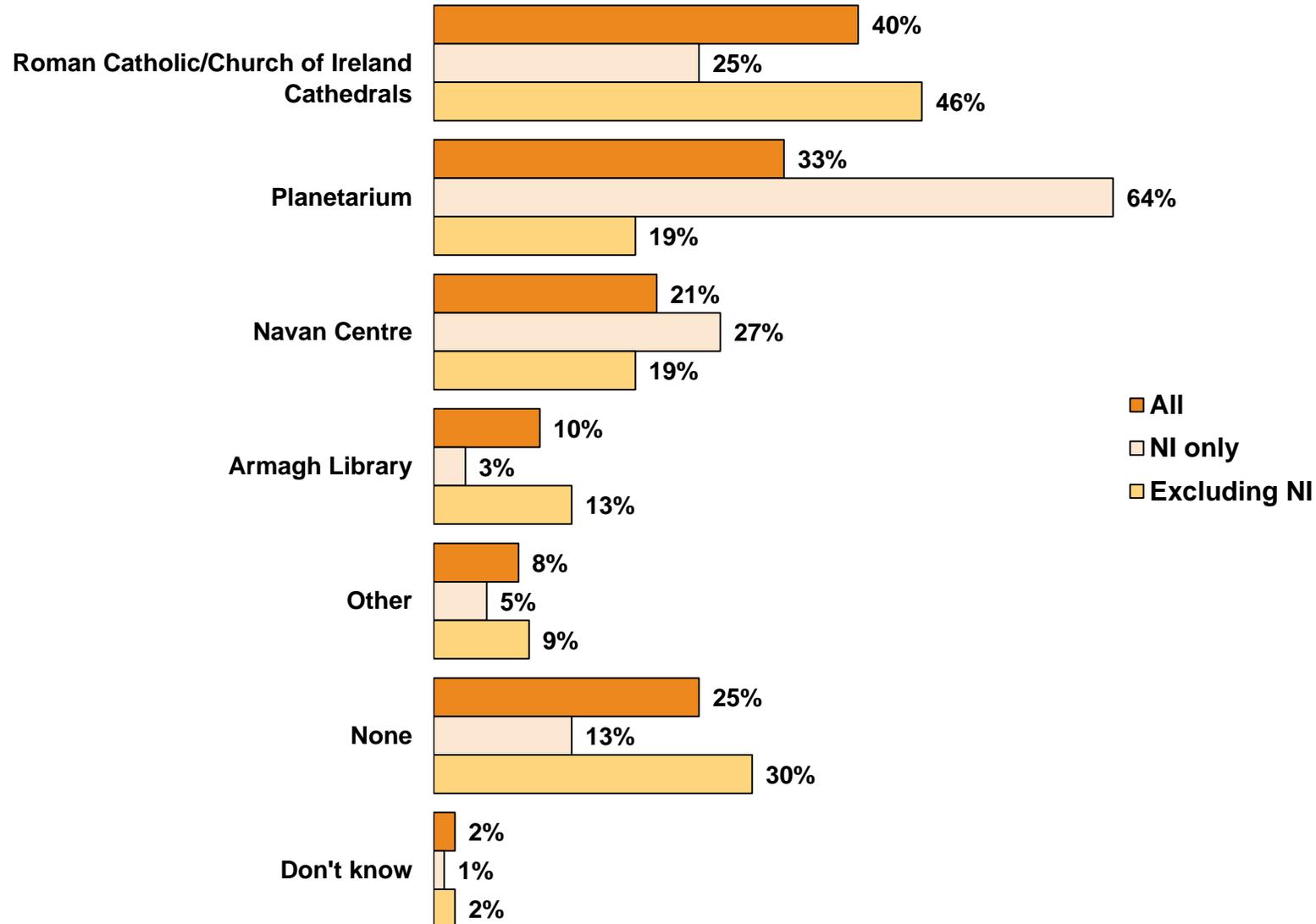
**Places visited in Strangford:** Mount Stewart was equally likely to have been visited by domestic and out-of-state visitors to the Strangford region. However while those visiting from outside NI were more likely to visit places related to St Patrick or the Cathedral in Downpatrick, domestic visitors (more often families with children on a day out) were more likely to be frequenting Exploris. Nearly half of all visitors to this area had children in their party and for many their key motivation was to keep their children entertained with plenty to do. A similar proportion came to the region to visit a specific attraction, while a significant number were making a return visit, often to a favourite place.



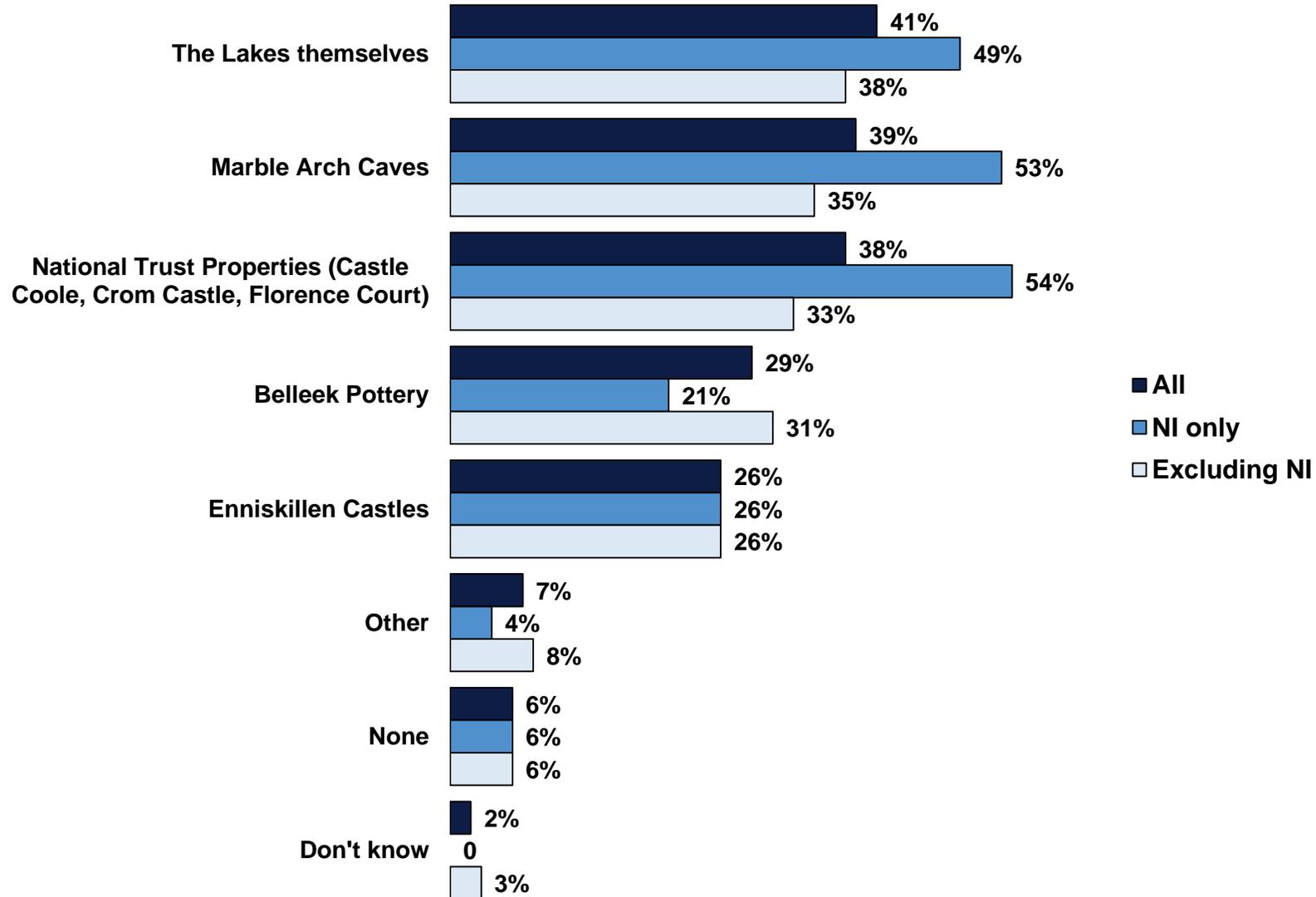
Places visited in the Mourne: 61% of those who visited the Mourne chose this region in order to enjoy the coast and lakes hence isn't surprising that the Newcastle Promenade and Silent Valley were the two most popular places visited in the Mourne area, with both more likely to be visited by Northern Ireland residents. More than 4 in 10 were visiting with children, and for many this region was somewhere where they had been before and wanted to return to, often a favourite place or they wanted to visit in take part in a particular activity.



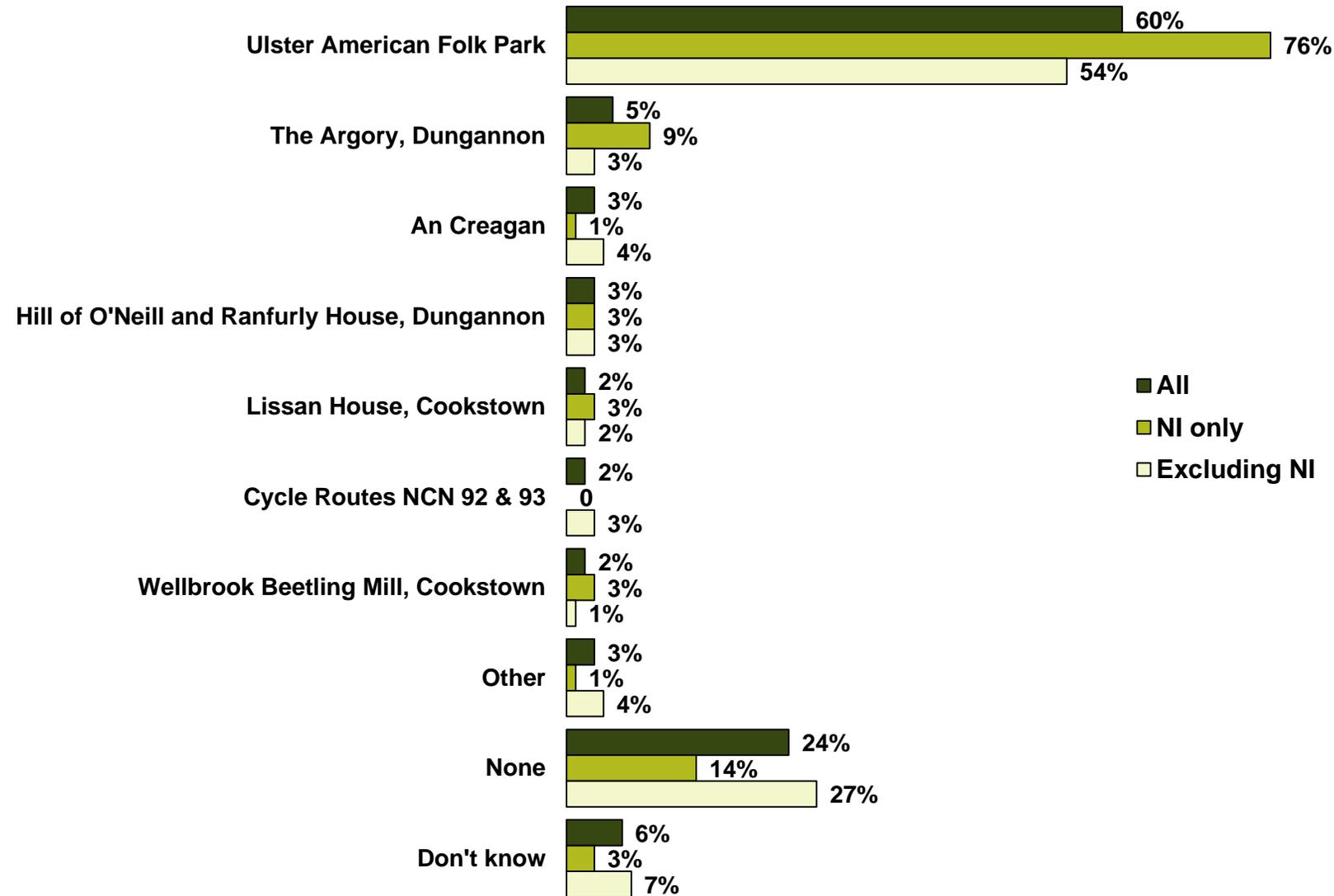
Places visited in Armagh: Overall the two Cathedrals were the most popular attractions in Armagh, although they were much more likely to be visited by those visiting from outside Northern Ireland. The Planetarium was by far the most frequented attraction in this area amongst domestic visitors, not surprising since more than 7 in 10 were visiting the region with children, and wanting to have loads for them to do was a key motivation, especially amongst NI residents. Many visitors choosing to visit this area wanted to find out stories, history and legends of Northern Ireland.



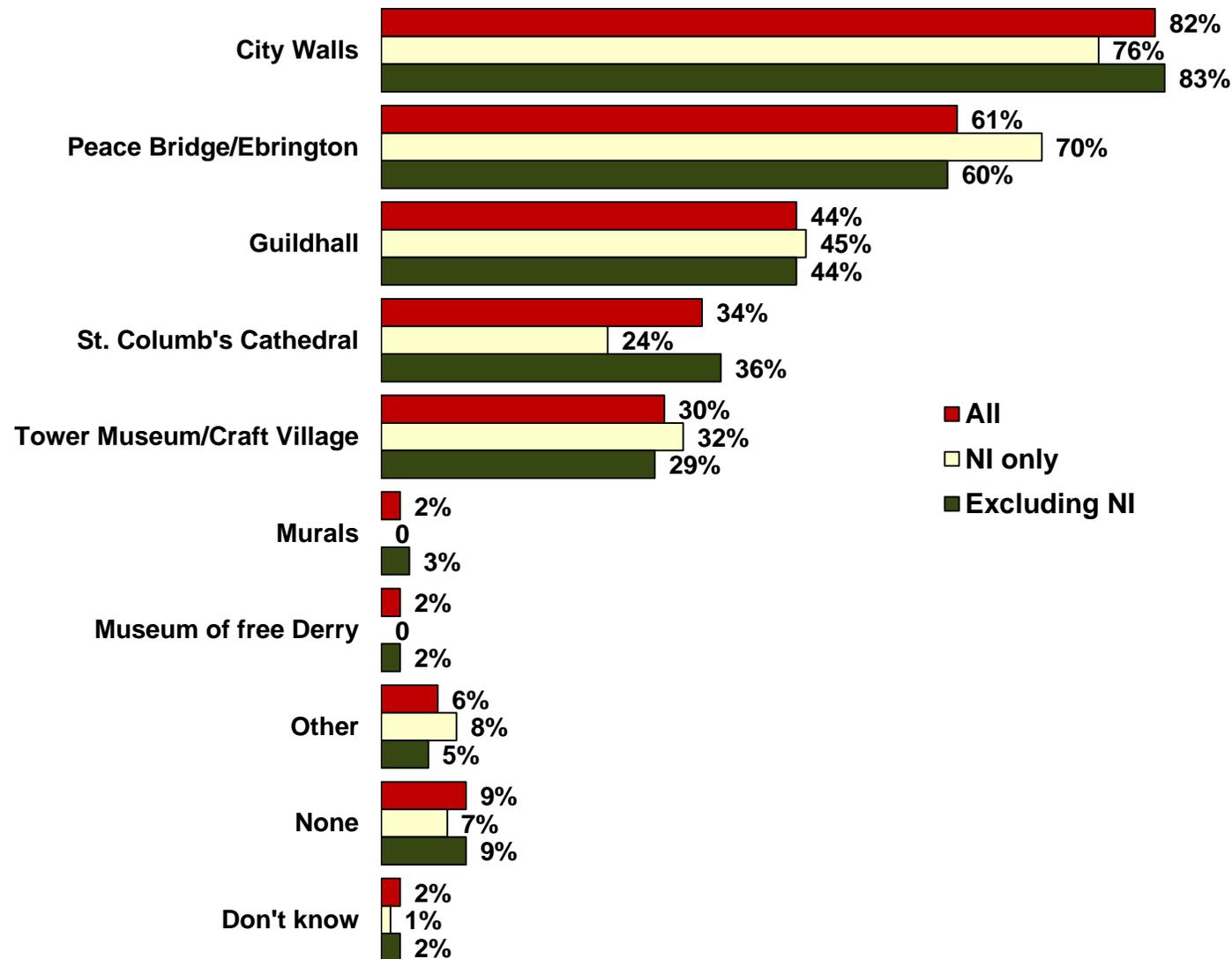
Places visited in Fermanagh: To enjoy the coast and lakes, exploring the surrounding towns and villages, beaches eateries and water was by far the theme chosen by visitors to Fermanagh to describe why they chose this area so it is not surprising that The Lakes, Marble Arch Caves and National Trust properties attracted most visitors especially amongst NI residents. Those visiting from outside NI were equally as likely to visit Belleek Pottery. Children were only part of the group for just over 3 in 10 visitors.



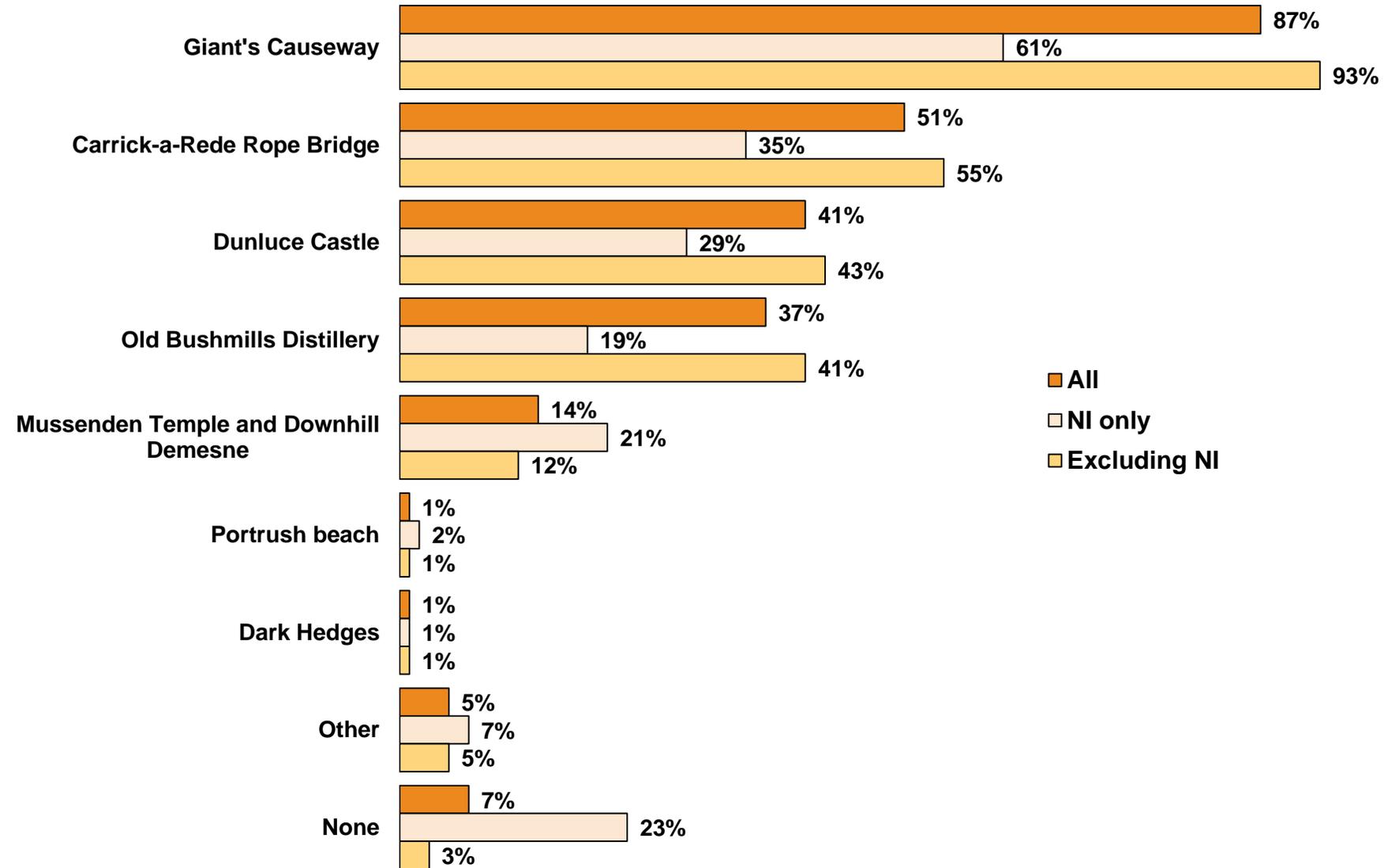
Places visited in Tyrone & Sperrins: The Ulster American Folk Park dominated in terms of attractions visited in the Tyrone & Sperrins region, especially amongst domestic visitors. More than half visited this region to visit a specific attraction, with almost 4 in 10 choosing this area to find out stories, history and legends of Northern Ireland. [It is worth noting again that key attractions were targeted for interviewing and email collection with some destinations having a greater array of popular attractions than others]



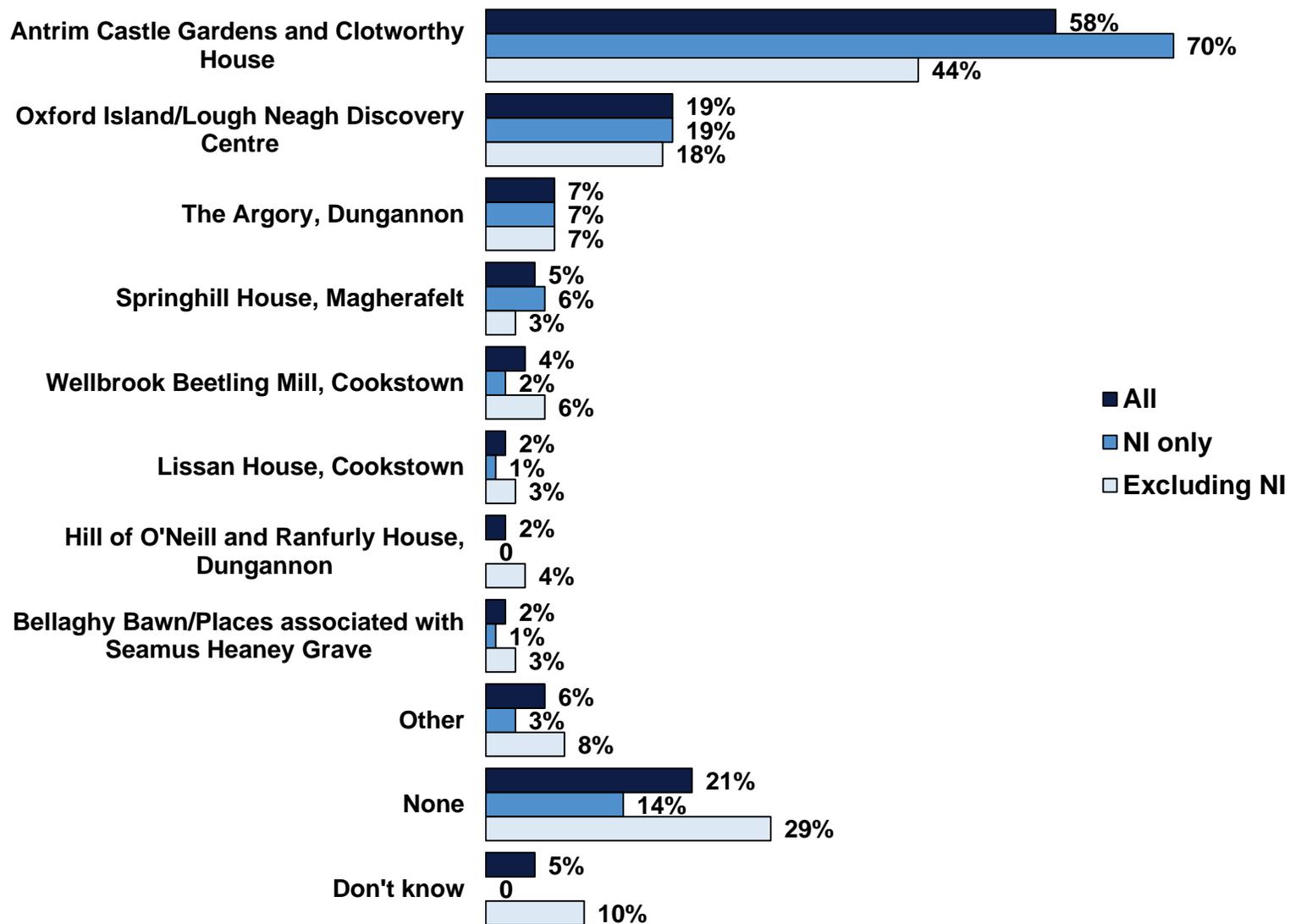
**Places visited in Derry~Londonderry:** Less than a fifth of visitors to this destination had children in their party, hence finding lots to do to keep the children entertained was not high on the agenda. Rather more than half (the highest for all regions) chose Derry-Londonderry to visit in order to find out stories, history and legends of Northern Ireland. Visitors to this destination were also more likely than others to be OOS, hence nearly all visitors (82%) to Derry/Londonderry included a visit to the City Walls, while nearly two thirds (61%) went to the Peace Bridge, and nearly half (44%) to the Guildhall.



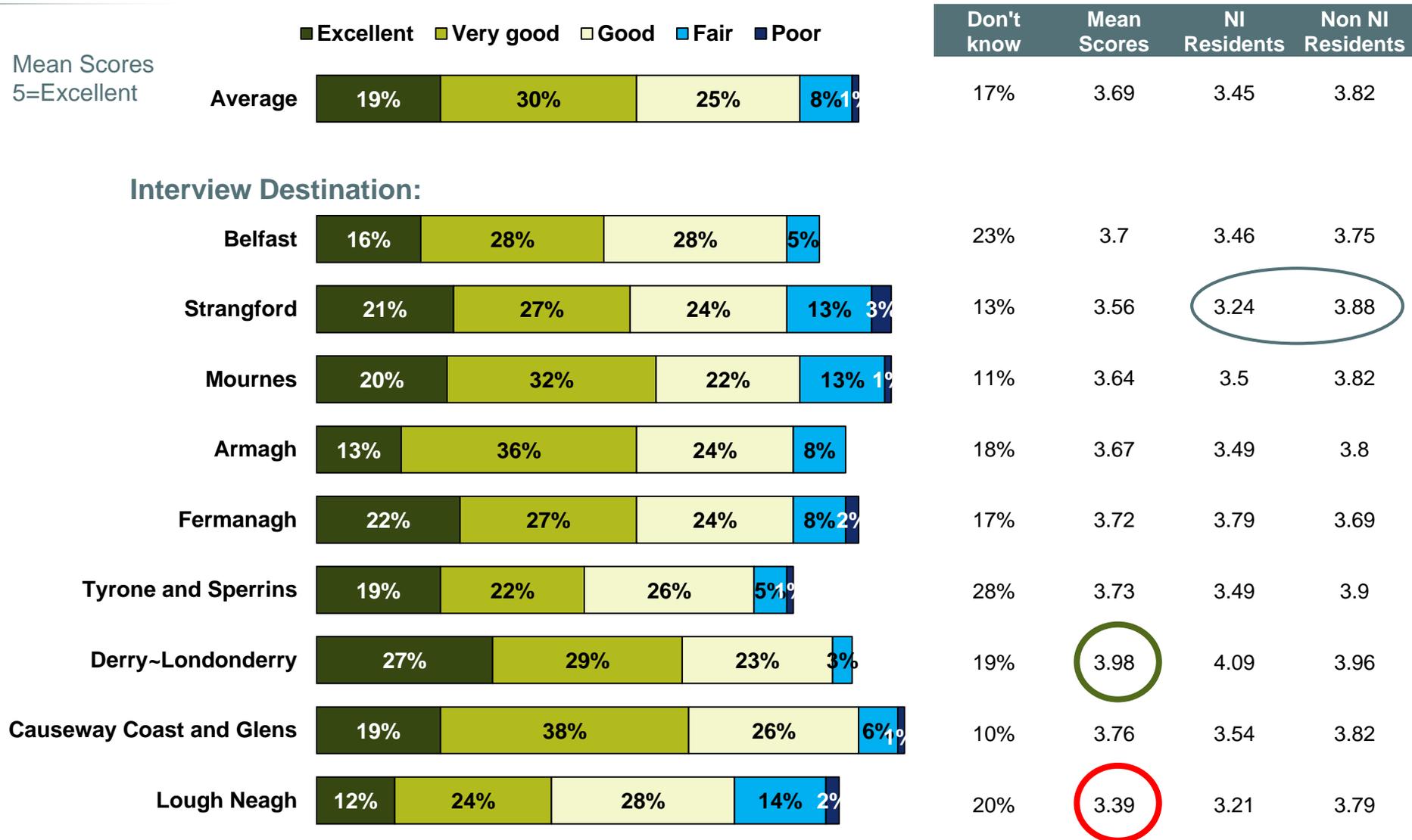
Places visited in Causeway Coast & Glens: The vast majority (93%) of visitors to this region from outside NI included a visit to the Giant's Causeway in their trip which isn't surprising given its prominence as a Signature Project Attraction. These visitors were also much more likely than domestic visitors to visit the Carrick-a-Rede Rope Bridge, Dunluce Castle and the Old Bushmills Distillery. Since a significant proportion wanted to visit a number of different places, which isn't surprising given the availability of attractions in this area, it is clear that most visitors did take in more than one location.



Places visited in Lough Neagh and surrounding Waterways: Almost half of visitors had children in their party, and given that many were visiting this region because they had been before and wanted to return, maybe even to a favourite place it was locations such as Antrim Castle Gardens and Clotworthy House that were most frequently visited in the Lough Neagh area, especially by those living in Northern Ireland, somewhere clearly favoured by those living relatively closely. [Interviewing in this region was concentrated in Antrim Castle Gardens as well as Oxford Island]



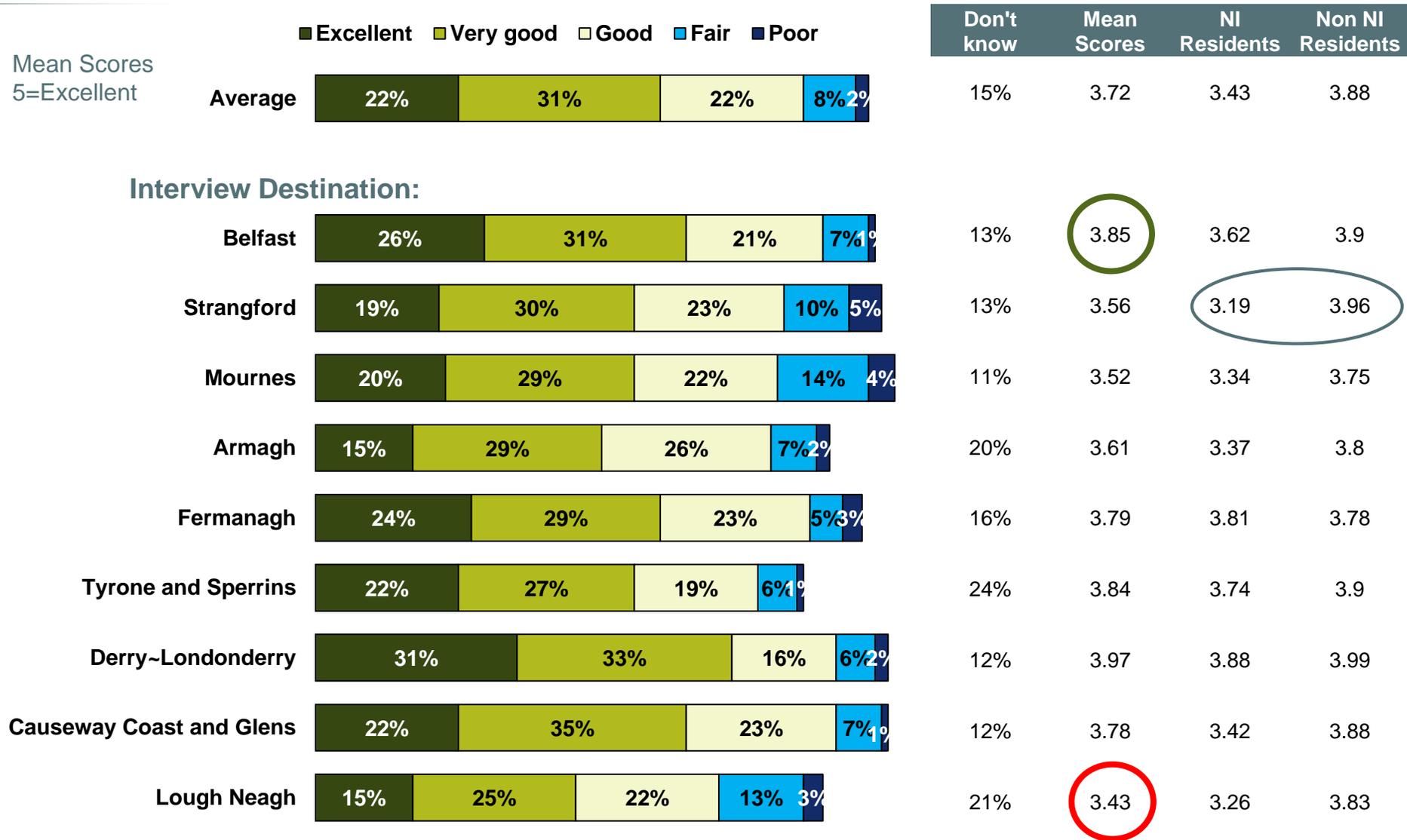
Rating - Cities, towns and villages that give the destination its own distinctive sense of place: On average no destination really performed exceptionally well on this attribute, which overall fell in the bottom half in terms of rating. The Derry-Londonderry area received the highest ratings for its distinctive sense of place amongst both OOS but particularly NI residents. The Lough Neagh area fared most poorly, which could be related to its position overlapping or bordering with so many other regions and as a result not seen as having any distinct personality or any particular USP, suggesting a clear opportunity for more product development in the future.



Q15a Rating of cities, towns and villages that give the destination its own distinctive sense of place

[ Base: All respondents n=1796 ]

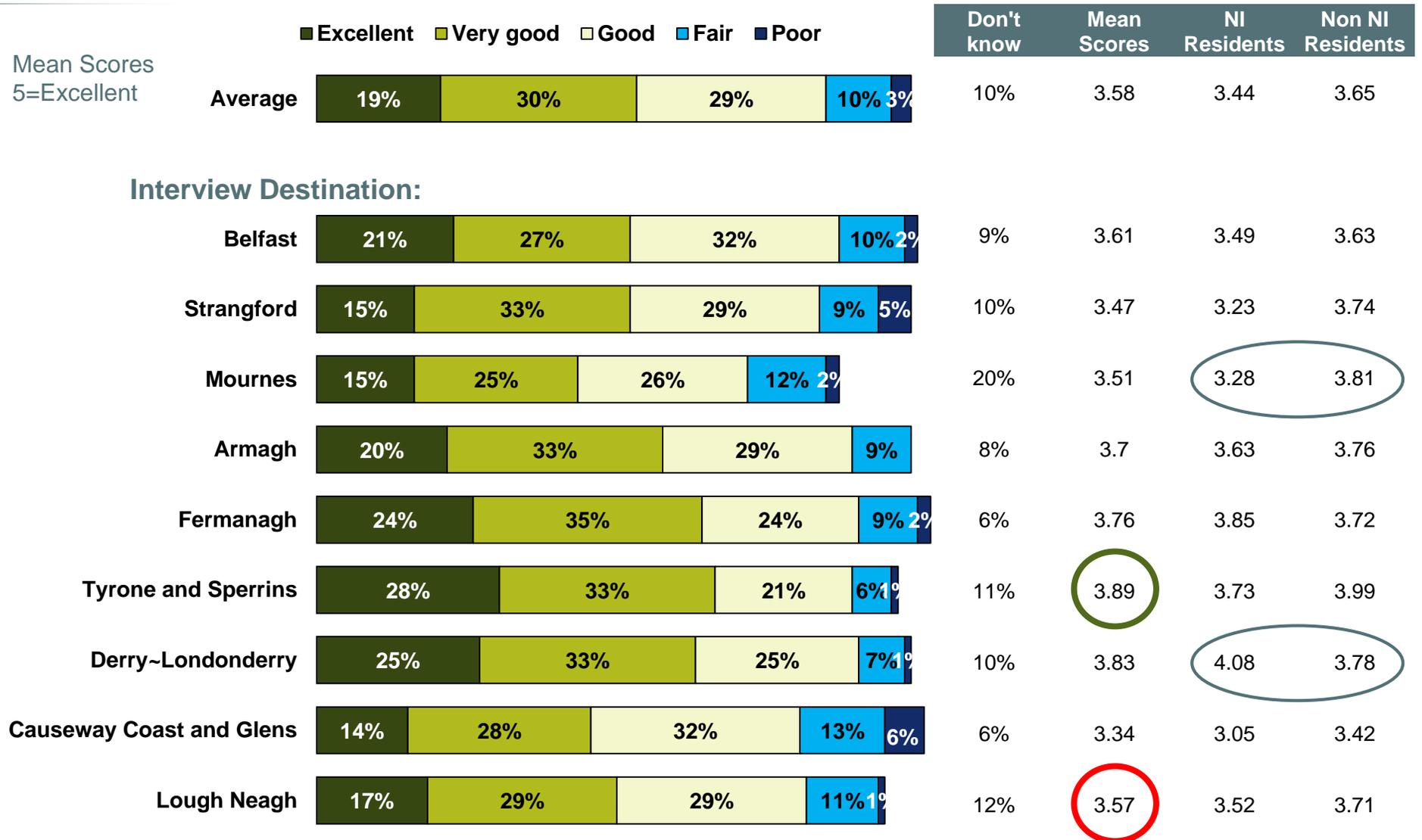
Rating - Unique things to do and see that reflect the destination's own local culture: Ratings overall were similar for this attribute and again it was Derry-Londonderry that received the highest approbation from visitors, although still not exceptional, this is most likely a legacy from the activities during its year as City of Culture. Ratings for the Strangford region were notably much more positive amongst OOS visitors compared to NI residents.



Q15b Rating of unique things to do and see that reflect the destination's own local culture

[ Base: All respondents n=1796 ]

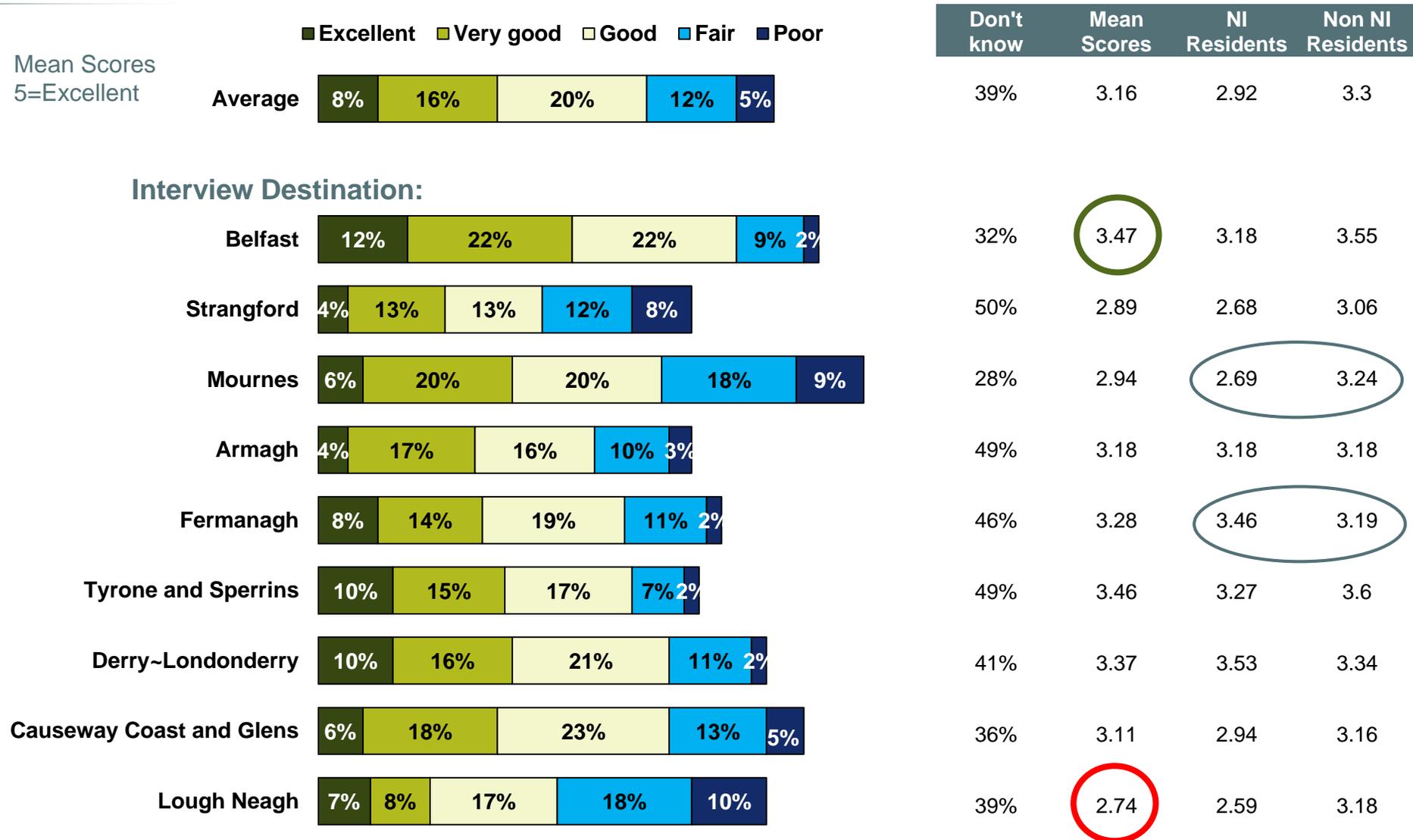
**Rating - Value for money of attractions:** Ratings given for the value for money of attractions were marginally higher overall among OOS visitors but were still disappointingly low. This attribute was most highly rated by visitors to the Tyrone and Sperrins area, although it should be noted that this was dominated by visits to the Ulster American Folk Park. The Causeway Coast & Glens was rated most poorly especially by NI residents.



Q15c Rating of value for money off attractions (historic sites, museums, visitor centres, etc.)

[ Base: All respondents n=1796 ]

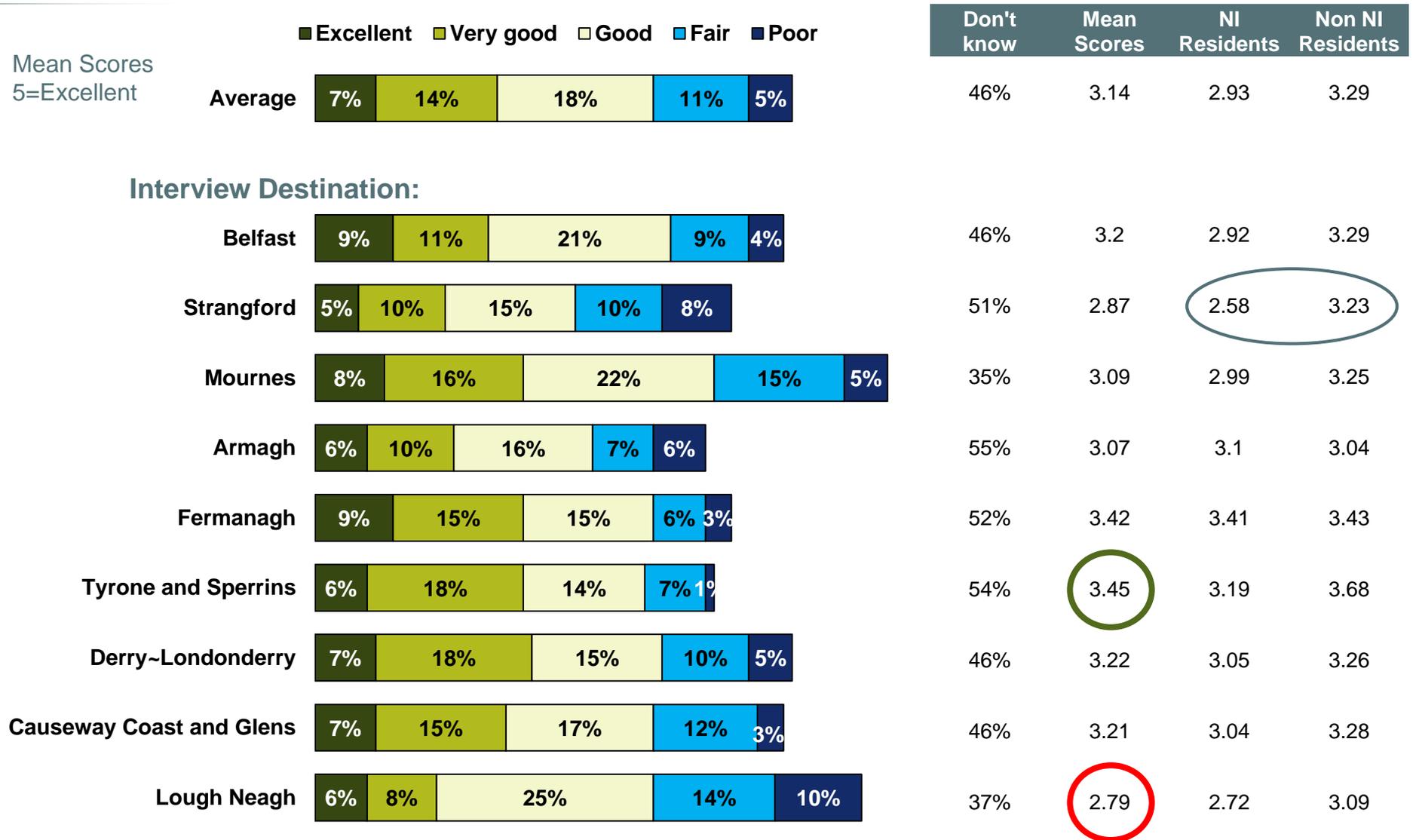
**Rating - Range of things to do in the evenings:** Unsurprisingly Belfast received the highest mean score from visitors in terms of having a range of things to do in the evenings, with non NI residents giving a much higher mean score than NI residents. However, on average ratings were very disappointing on this attribute, with the overall average just over 3 and some destinations falling below 3. This is one key attribute that needs improvement and as a result it is not unexpected that few visitors selected 'to enjoy contemporary experiences such as vibrant cities, music, nightlife, festivals and events, culture and arts' as the reason why they chose any destination here.



Q15d Rating of range of things to do in the evenings

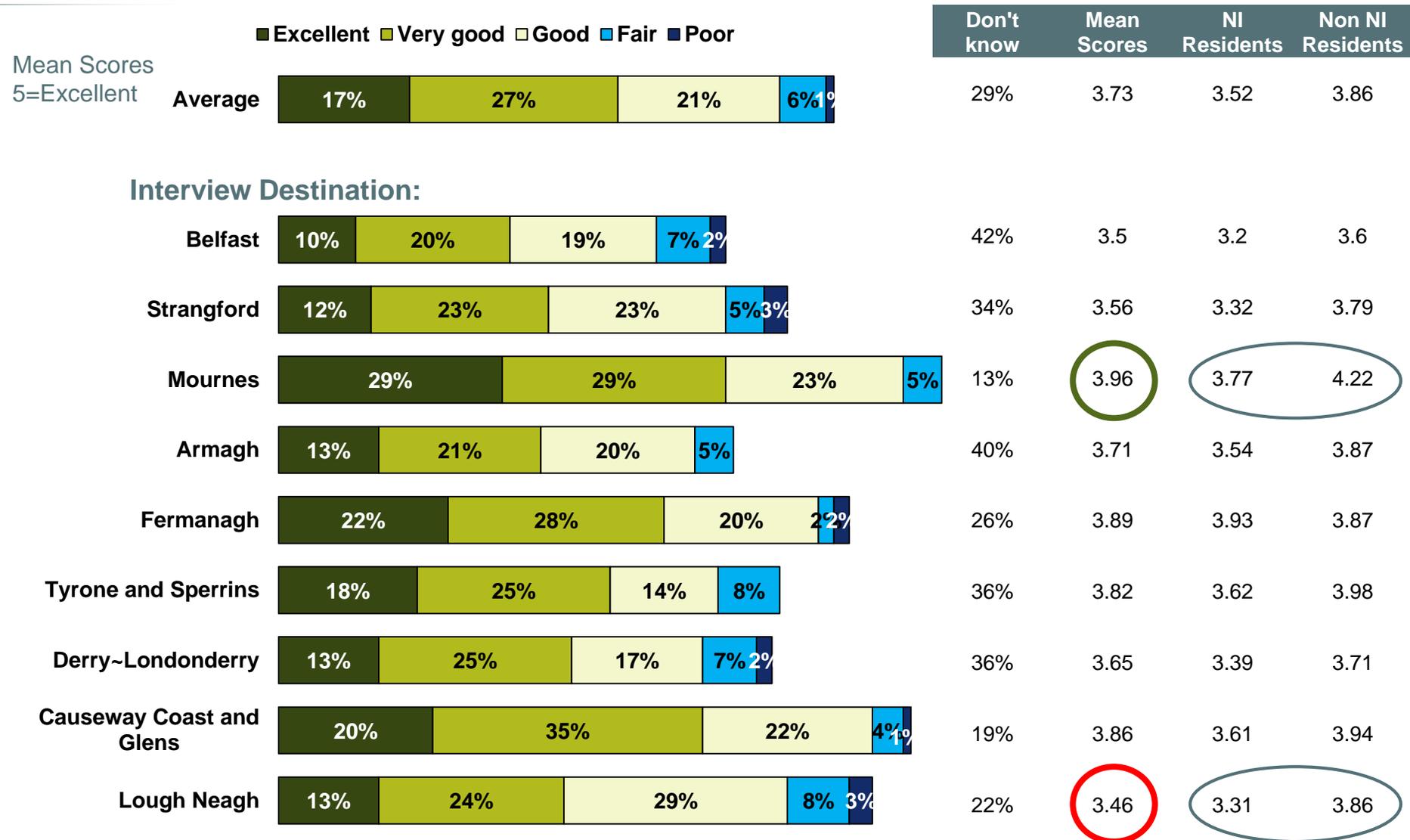
[ Base: All respondents n=1796 ]

**Rating - Range of things to do on Sundays:** It was on this attribute that all destinations overall were rated most poorly. The level of don't knows is also very significant suggesting that many weren't taking in a Sunday on their visit. Generally ratings were better amongst OOS visitors but still nowhere near ideal levels, being much closer to good than very good. Fermanagh and Tyrone & Sperrins received somewhat more positive approbation, probably due to the type of locations available, open on a Sunday, such as the Ulster American Folk Park and National Trust Properties.



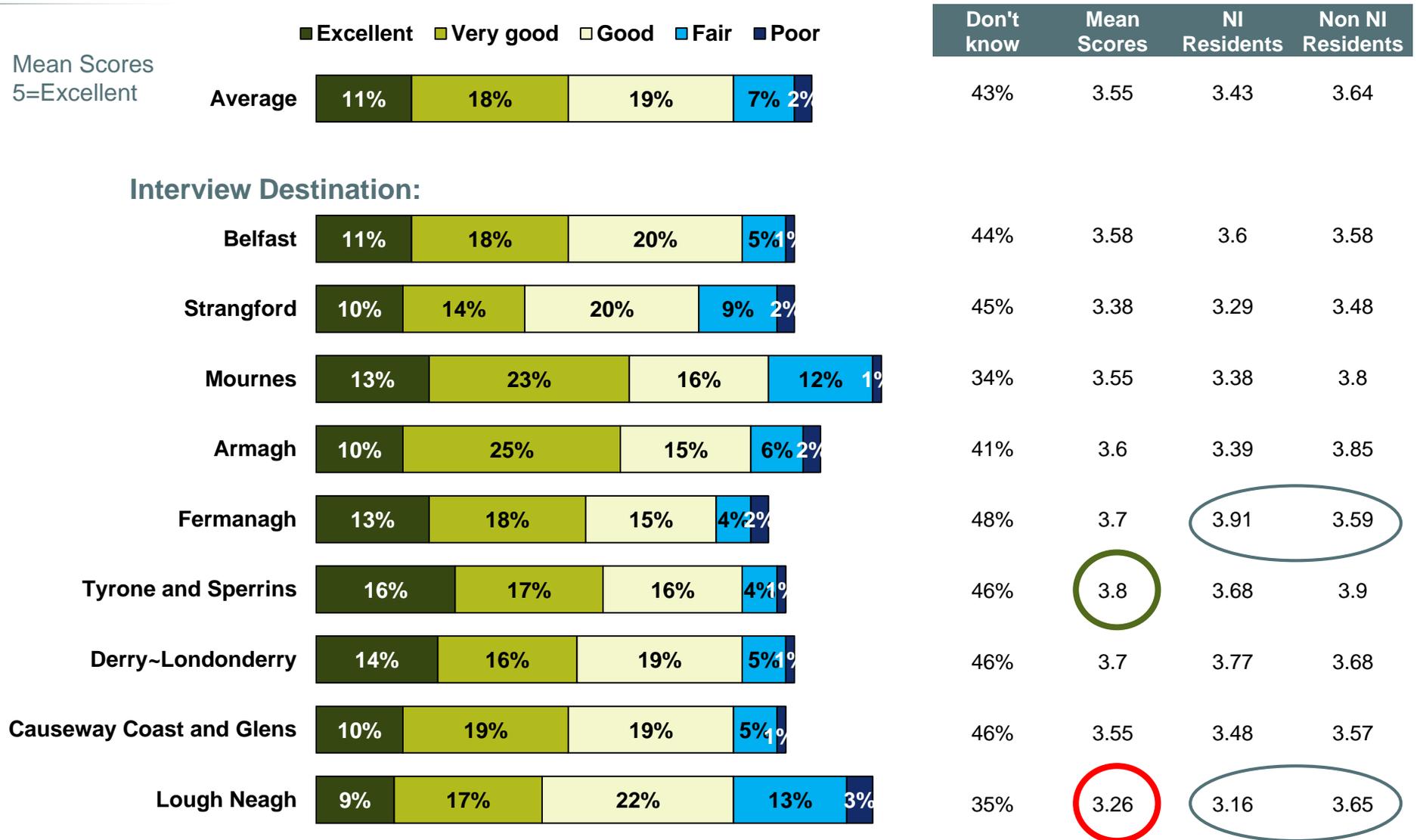
Q15e Rating of range of things to do on Sundays  
[ Base: All respondents n=1796 ]

Rating - Range of outdoor activities to do: Ratings were generally a little better for in relation to outdoor activities and destinations that scored quite well included the Mournes (especially amongst OOS visitors), Fermanagh and the Causeway Coast & Glens. However given our coasts and countryside, there must be opportunity to offer a greater breadth of activities to take part in out-of-doors, albeit taking into account the unpredictable weather we can experience.

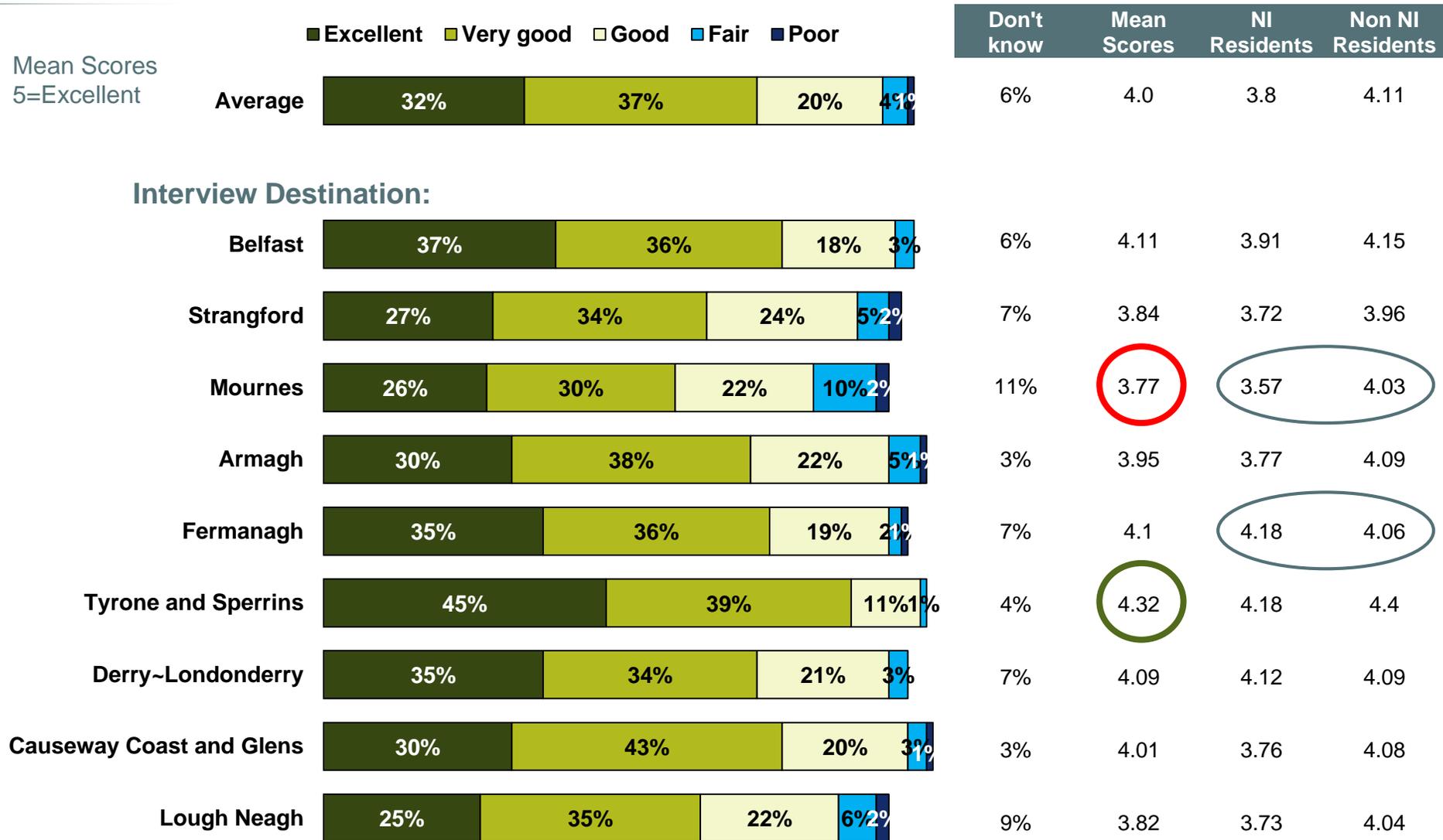


Q15f Rating of a range of outdoor activities to do  
[ Base: All respondents n=1796 ]

Rating - Opportunities to attend local events / festivals: Again no destination was highly rated in terms of opportunity to attend local events or festivals and in fact many visitors to each region were unable to give an opinion.



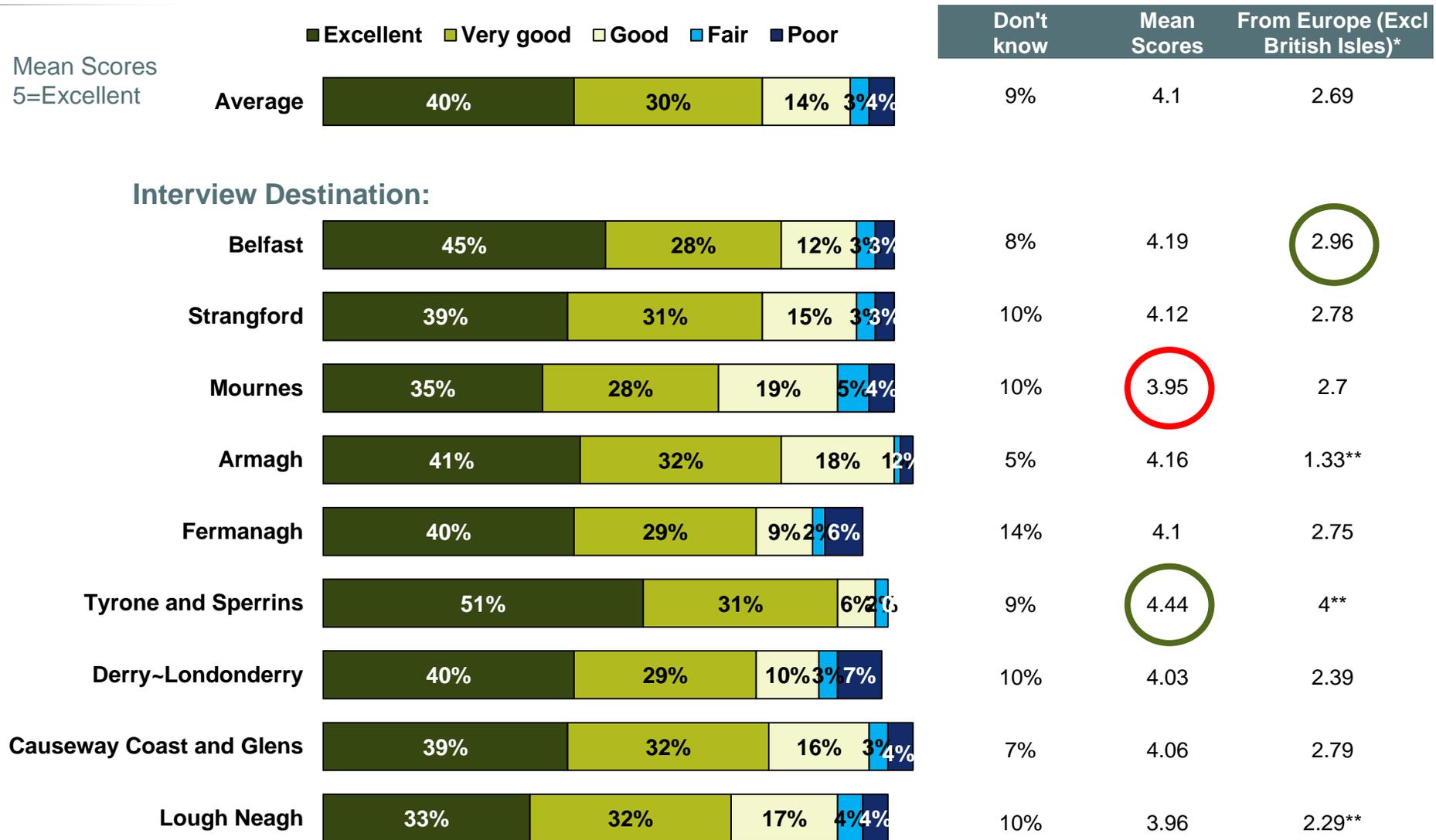
Rating - Information at visitor attractions which tells the story of the place visited: Ratings were however generally more positive in relation to this attribute, with Visitors to the Tyrone and Sperrins area most impressed with the information at visitor attractions telling a story of the place visited, again this rating was most probably primarily influenced by visits to the Ulster American Folk Park. Visitors to the Mournes scored somewhat lower overall, particularly NI residents, probably due to the outdoor nature of many of the attractions where story telling isn't as much of an element of the offering.



Q15h Rating of information at visitor attractions which tells the story of the place you are visiting

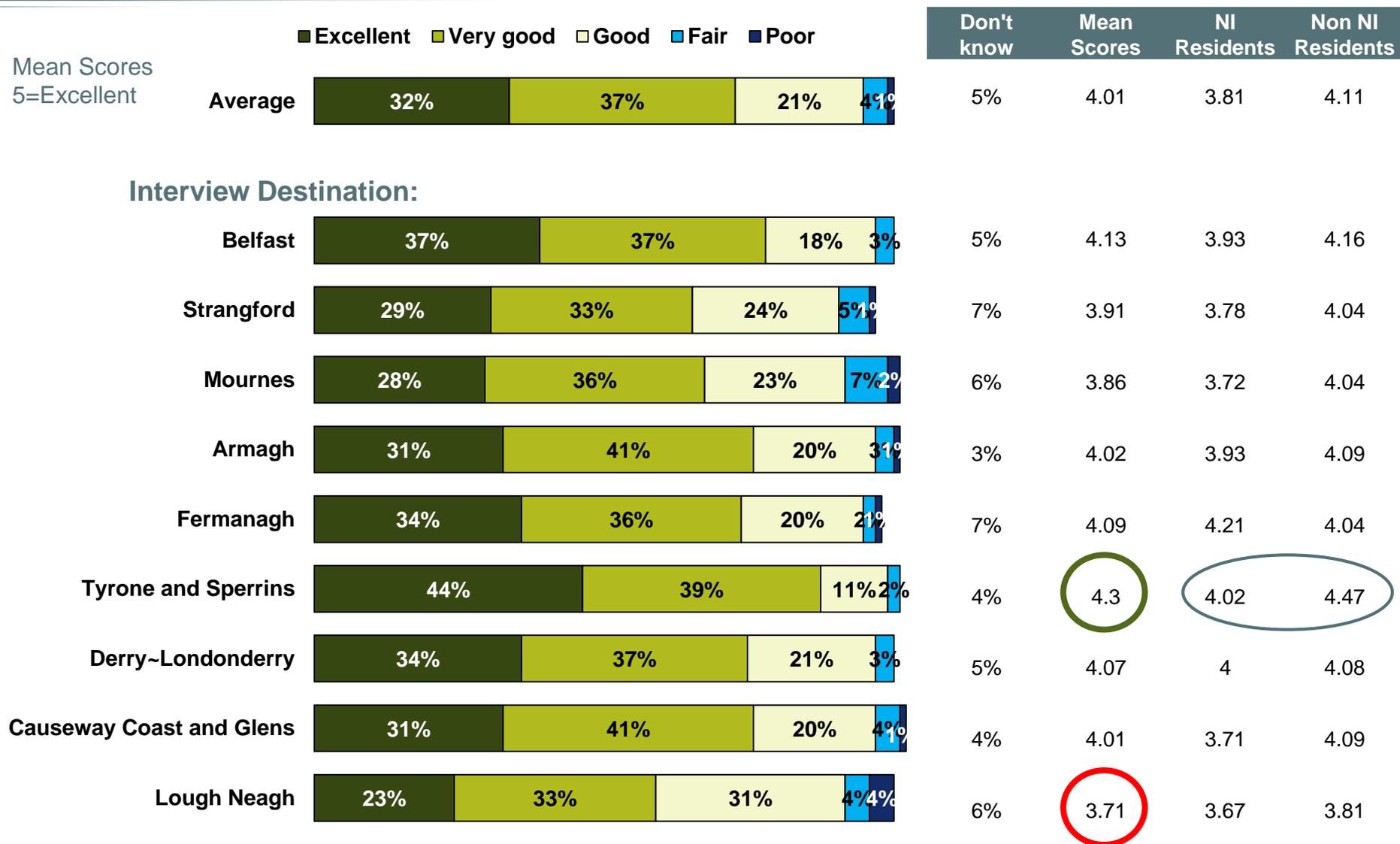
[ Base: All respondents n=1796 ]

Rating - Information at attractions in own language: Since the majority of visitors probably spoke English as their first language, it is not surprising that overall the rating for this was relatively good. However when the views of those who are less likely to speak English are examined (albeit with much reduced bases), ratings fall drastically to somewhere between fair and good.



Q15i Rating of information at visit attractions in your own language  
[ Base: All respondents n=1796 ] \* Bases Low \*\*Base very low < 10

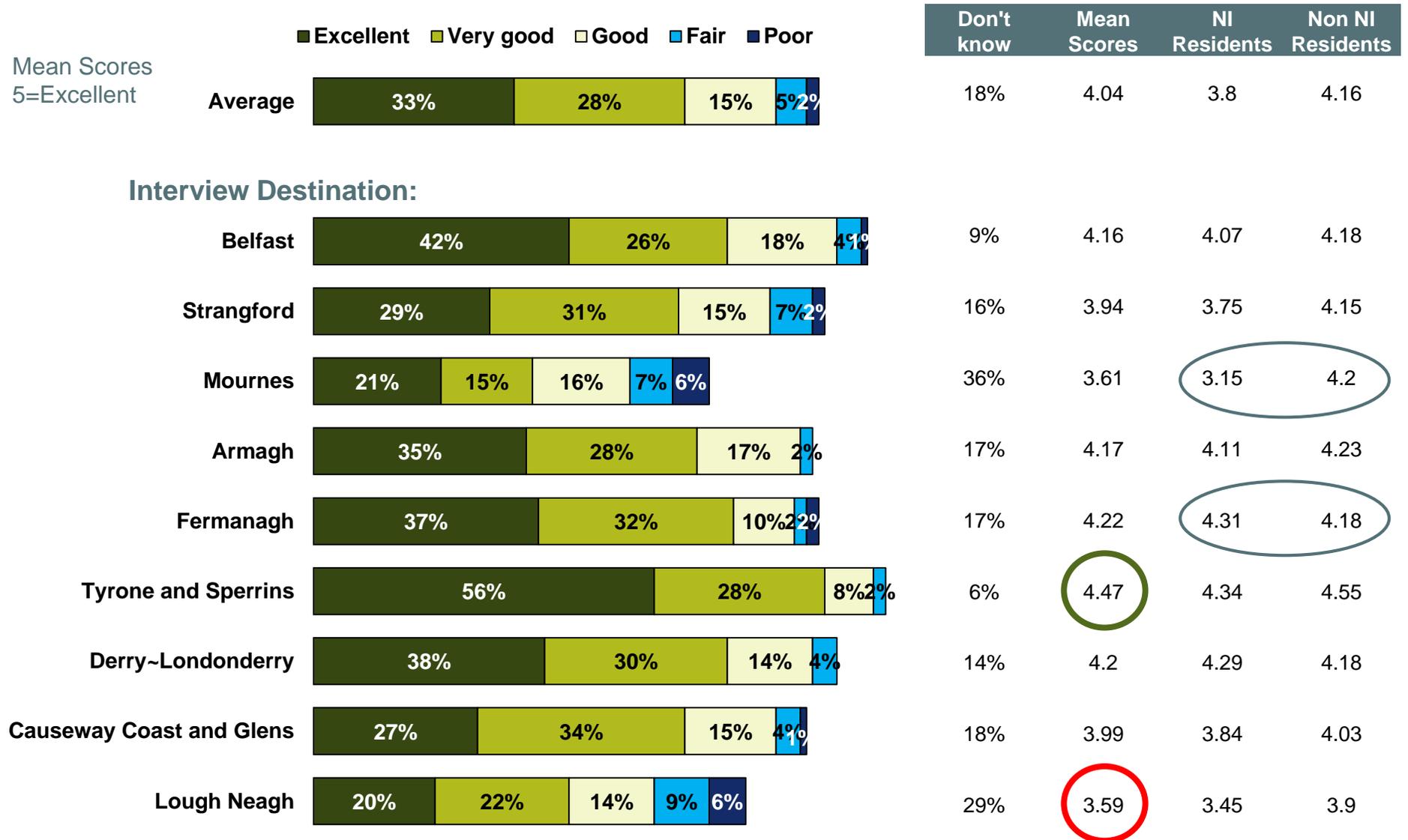
Rating - Information to tell you about the places you visit: Again ratings are generally higher on this attribute with visitors to Tyrone and Sperrins visitors giving the highest rating for the information telling about the place visited and visitors from the outside Northern Ireland giving particularly high ratings. The strength of the offering by the Ulster American Folk Park is apparent for this.



Q15j Rating of information to tell you about the places you visit

[ Base: All respondents n=1796 ]

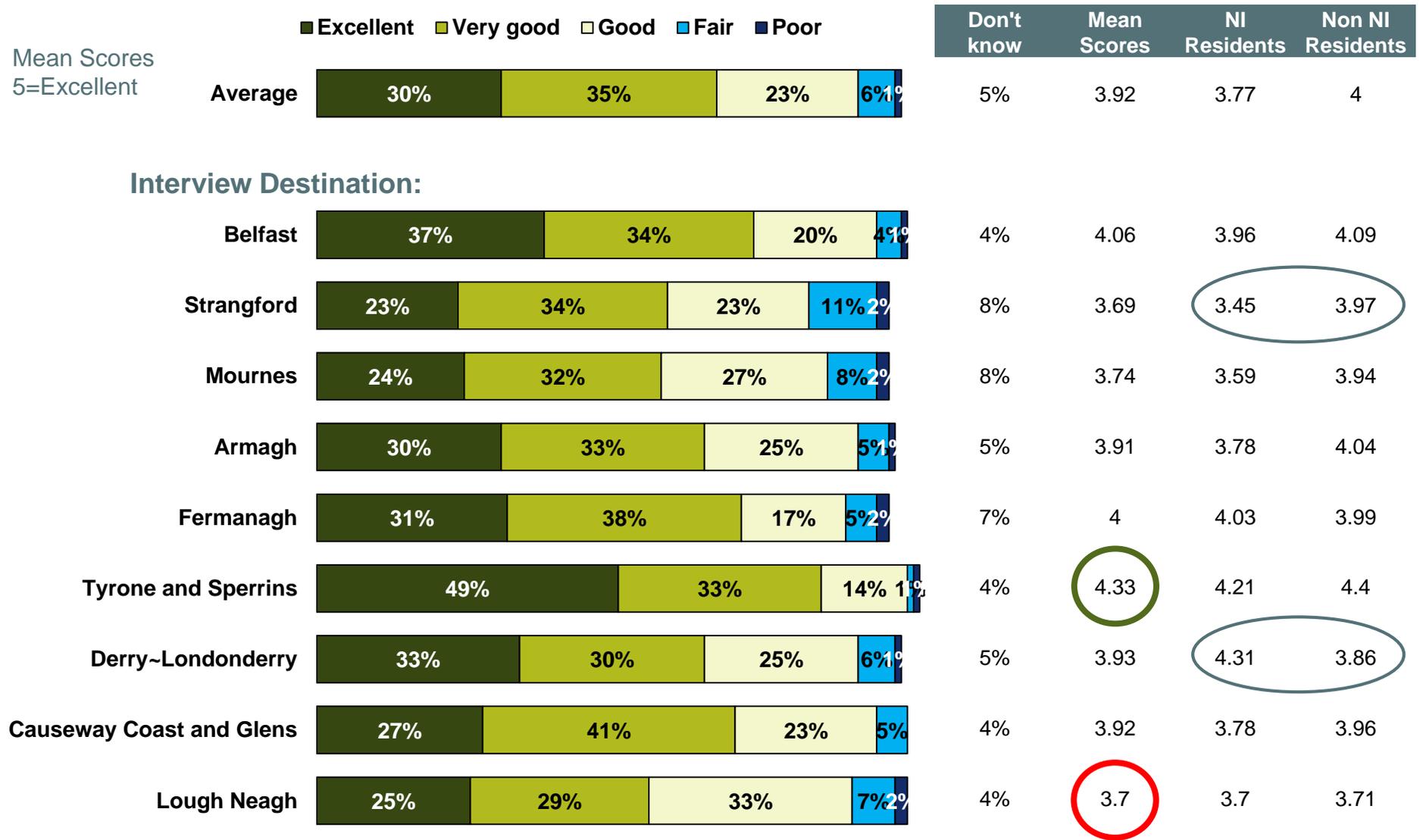
Rating - Staff on tours and in attractions telling stories about the local history and places of interest: The strength of our tourism offering in terms of people related attributes again shows for this, with ratings of the staff and their story telling comparatively high, especially amongst OOS visitors. This was similarly rated much higher by those visiting the Tyrone and Sperrins compared to other areas.



Q15k Rating of staff on tours and in attractions to tell stories about the local history and places of interest

[ Base: All respondents n=1796 ]

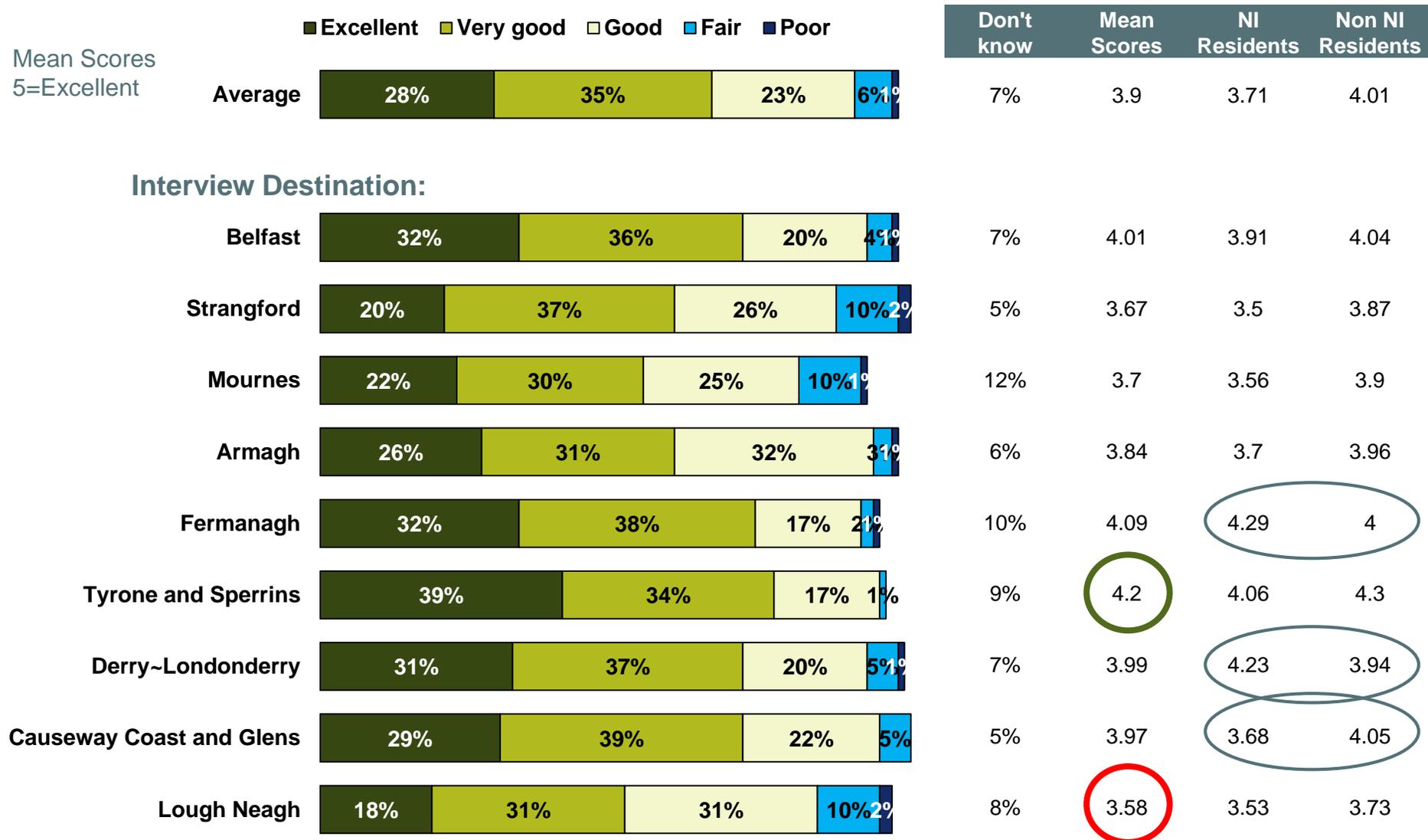
Rating - Positive buzz at the places visited: Views were somewhat mixed in terms of this attribute, with destinations such as Belfast, Fermanagh and Tyrone & Sperrins seen as having a more positive buzz about them.



Q15I Rating of the places you visited had a positive buzz about them

[ Base: All respondents n=1796 ]

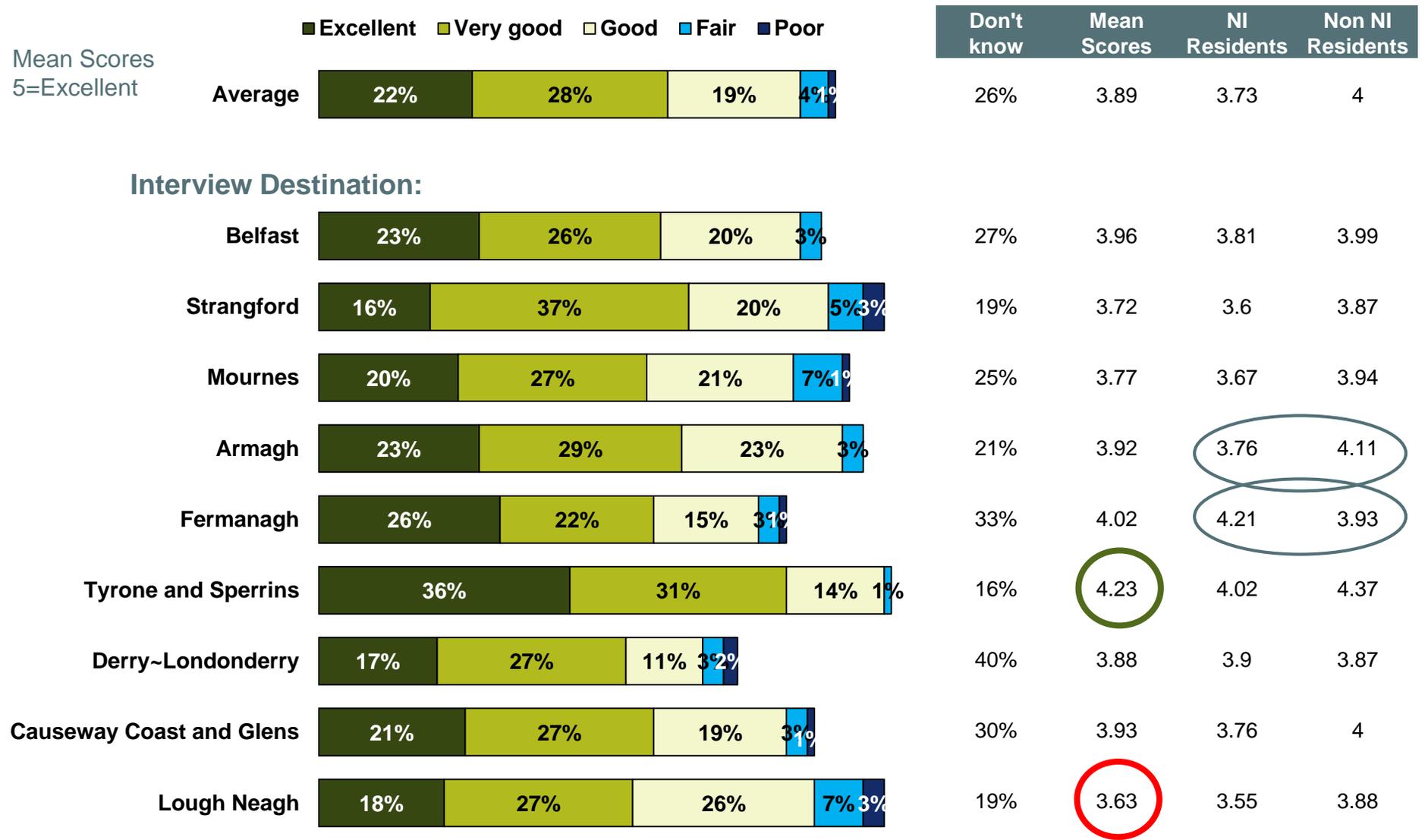
Rating - Range of interesting / enjoyable visitor attractions: Obviously those destinations with a wider range of attractions will tend to score better on this rating and this is so for Belfast, Fermanagh, Derry-Londonderry and the Causeway Coast & Glens, unless of course a destination offers a quite unique attraction which visitors seemed to enjoy such as the Ulster American Folk Park in Tyrone & Sperrins.



Q15m Rating of range of interesting / enjoyable visitor attractions

[ Base: All respondents n=1796 ]

Rating - Range of activities suitable for families: Having loads for children to do was a key motivation for visitors to many of the destinations, especially amongst visitors from NI or ROI but it wasn't necessarily those destinations that scored particularly well for this attribute. Visitors to Armagh, Belfast and Strangford were more likely to be motivated by keeping the children happy but it was Tyrone & the Sperrins and Fermanagh that were rated above average on having a range of activities suitable for families.



Q15n Rating of range of activities suitable for families  
[ Base: All respondents n=1796 ]

# Accommodation

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Accommodation stayed in: Hotels were the most popular type of accommodation for those staying in the Belfast, Armagh, Mournes and Derry-Londonderry areas with more than half (55%) of all overnight visitors to Belfast and over two fifths (42%) of overnight visitors to Derry-Londonderry staying in a hotel. For those staying in the Strangford and Fermanagh areas, approximately a quarter of overnight visitors chose to stay in self-catering accommodation while staying with family and friends was the most popular for those staying in Tyrone and Sperrins (27%) and Lough Neagh area (36%).

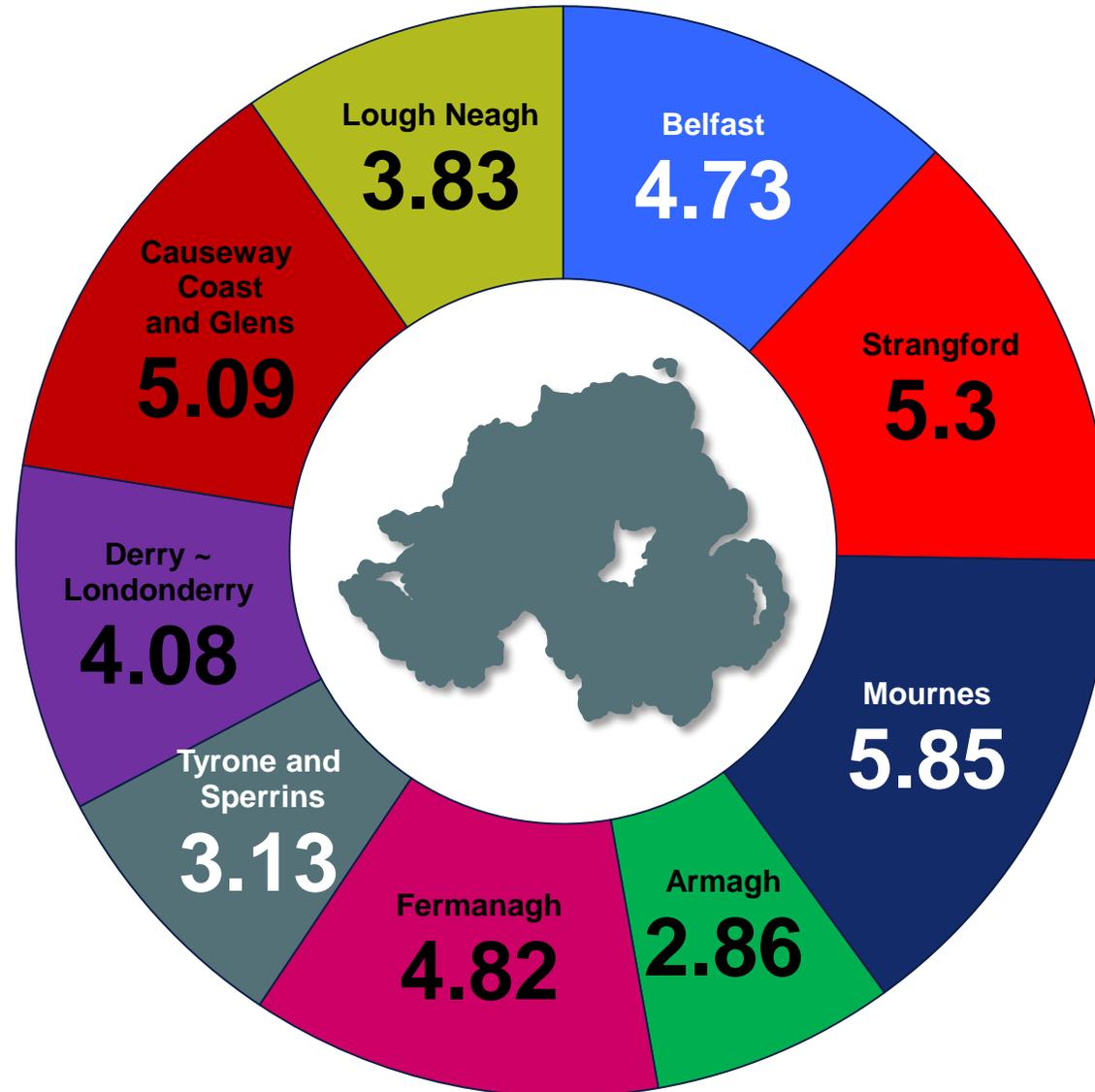
Accommodation Region	Greater Belfast n=398	Strangford n=57	The Mournes n=94	Armagh N=31*	Fermanagh n=72	Tyrone & Sperrins n=49*	Derry-Londonderry n=125	The Causeway Coast & Glens n=295	Lough Neagh and surrounding area n=70
Hotel	55%	14%	21%	39%	17%	16%	42%	26%	21%
Bed and Breakfast	11%	11%	11%	23%	18%	14%	22%	28%	11%
Staying with friends / relatives	17%	19%	17%	26%	14%	27%	17%	11%	36%
Self-catering flat / house / cottage	7%	26%	21%	0	24%	8%	7%	12%	6%
Camping	2%	4%	15%	3%	7%	18%	0	6%	7%
Caravan	0	7%	16%	6%	6%	4%	1%	7%	7%
Guest House	2%	11%	2%	6%	3%	6%	4%	7%	1%
Youth Hostel	6%	4%	1%	0	0	0	4%	4%	0
Motorhome	1%	4%	5%	0	6%	2%	1%	6%	3%
Second home	1%	2%	4%	0	3%	0	1%	5%	1%
University accommodation	3%	4%	0	0	0	0	2%	*	0
Boat or cruiser	1%	4%	1%	0	1%	0	0	*	0
Other	1%	5%	1%	0	10%	8%	5%	1%	11%
Golfing	1%	1%	3%	1%	2%	3%	1%	4%	1%
Fishing	*	1%	3%	1%	6%	1%	0	1%	2%
Other	6%	4%	3%	8%	3%	1%	6%	3%	5%

Q.19b Accommodation stayed in specified destination

[ Base: All who stayed overnight n=1215]

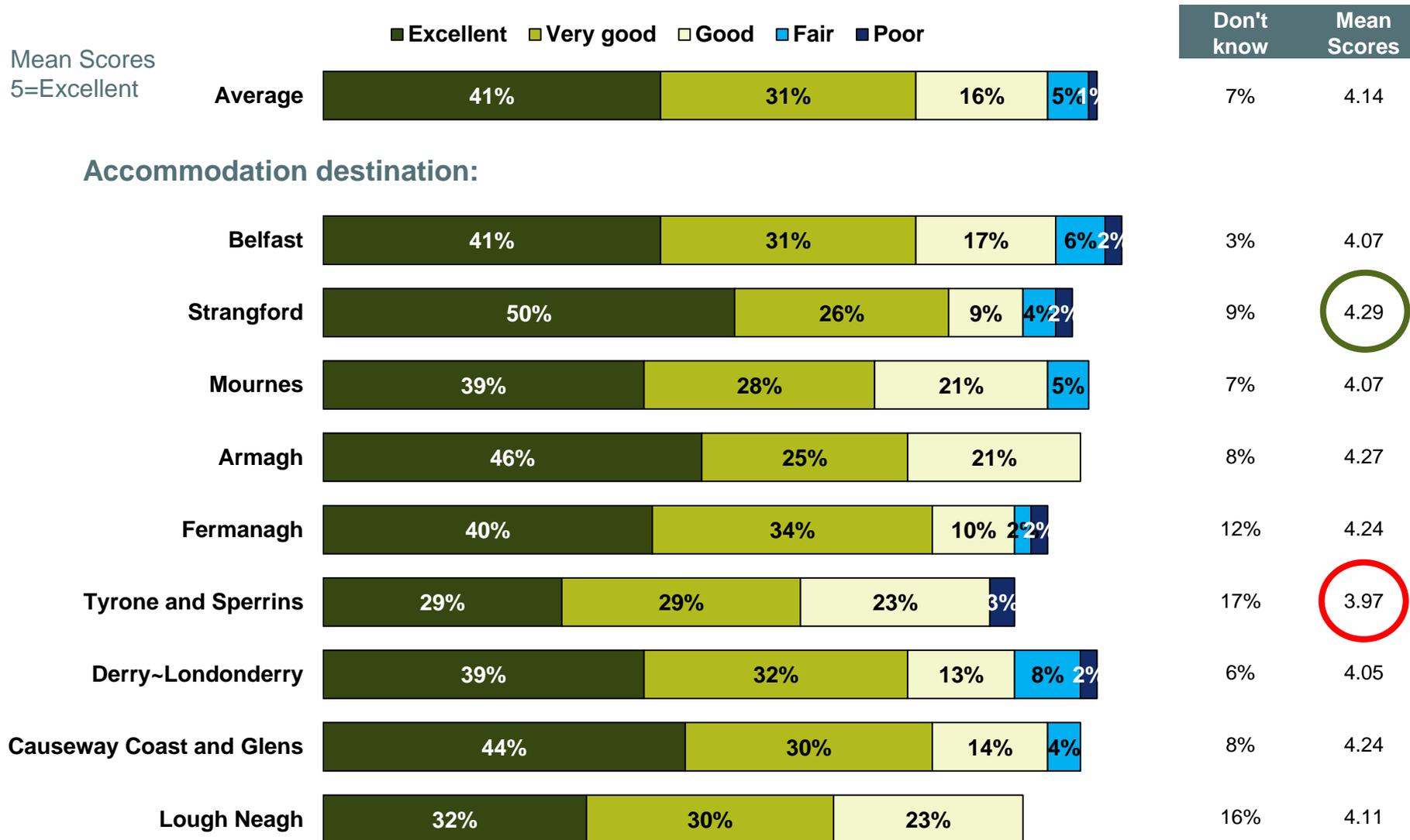
\*CAUTION: Small base

**Average number of nights stayed in Destination:** Those staying over in the Mournes region stayed over the longest, staying on average almost 6 nights, followed by Strangford, both areas where self catering was relatively popular.



Average Number of nights stayed in Accommodation Destination  
[ Base: All online respondents who stayed over in destination  $n=1215$  ]

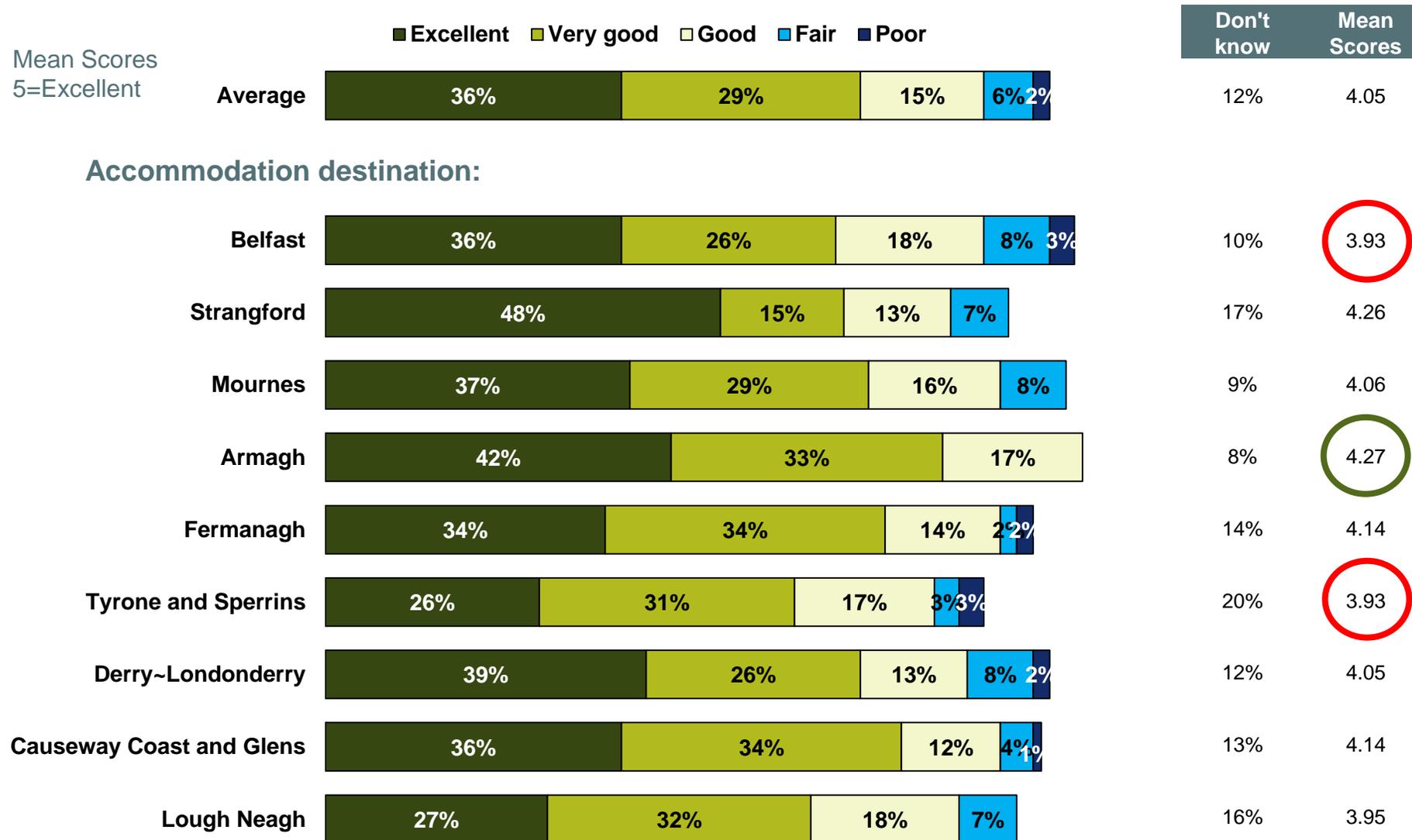
Rating of accommodation - friendly and informative staff / host: The people of NI continue to be a key asset of the Tourism offering, with all people related metrics generally scoring well and the staff in places of accommodation appear to reinforce this feeling. Overall this was one of the highest rated metrics (and one of particular importance). Visitors from the Strangford (caution small base) area gave the highest rating for the staff or host in their paid accommodation being friendly and informative, followed by visitors to the Armagh (small base), Fermanagh and Causeway Coast & Glens regions.



Q21a Rating of accommodation – friendly and informative staff / host

[ Base: All who stayed in paid for accommodation n=977 ]

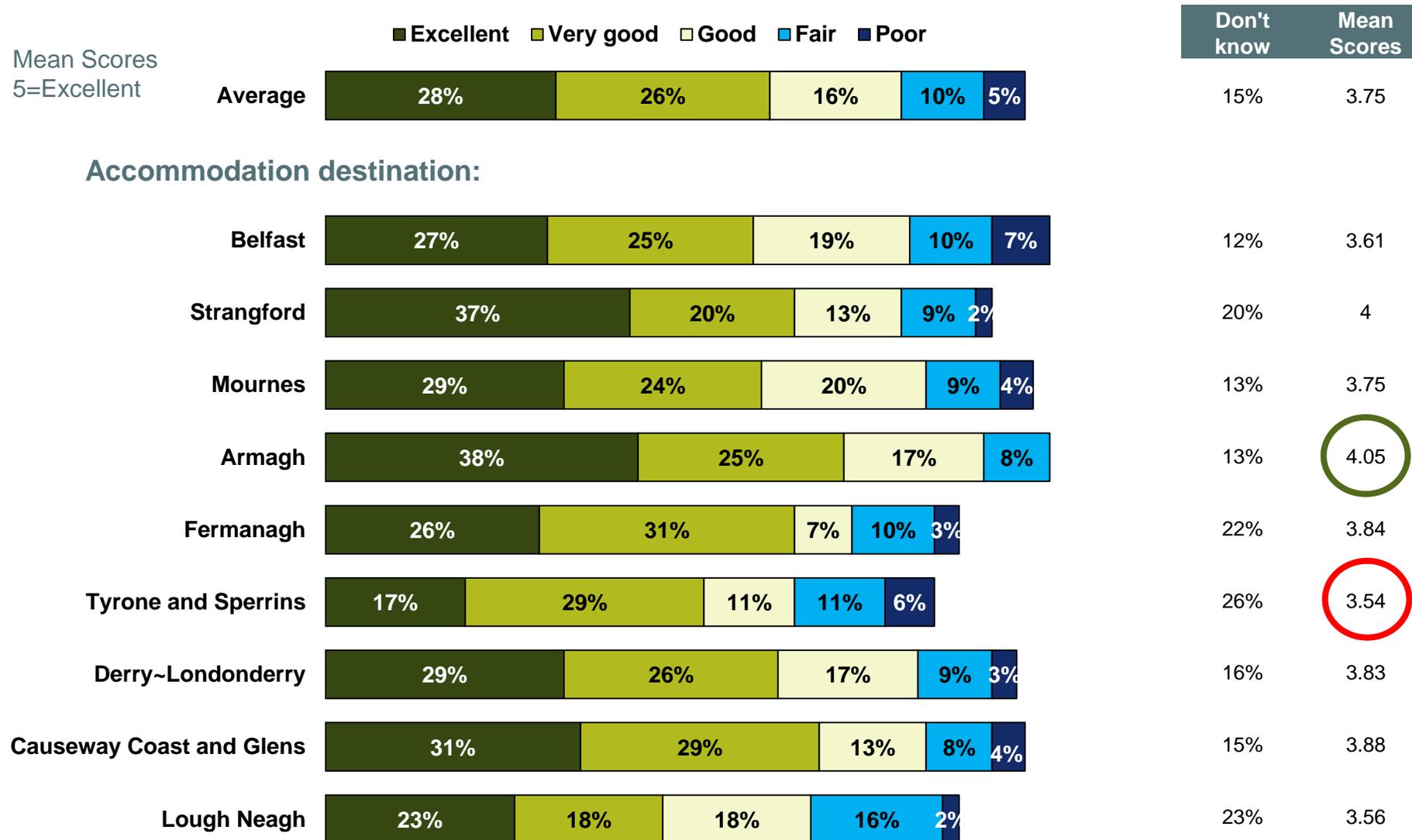
Rating - Staff conveyed a sense of pride / belief in the local area: Again this attribute relating to staff in places of accommodation is comparatively well rated, and it is staff in Armagh\*, Strangford\*, Fermanagh and Causeway Coast who are again most highly rated. Almost 1 in 2 of those staying in the Strangford\* area rated staff as excellent in terms of conveying a sense of pride and belief in the local area.



Q21b Rating of accommodation – staff convey a sense of pride / belief in the local area

[ Base: All who stayed in paid for accommodation n=977 ] \* Small bases

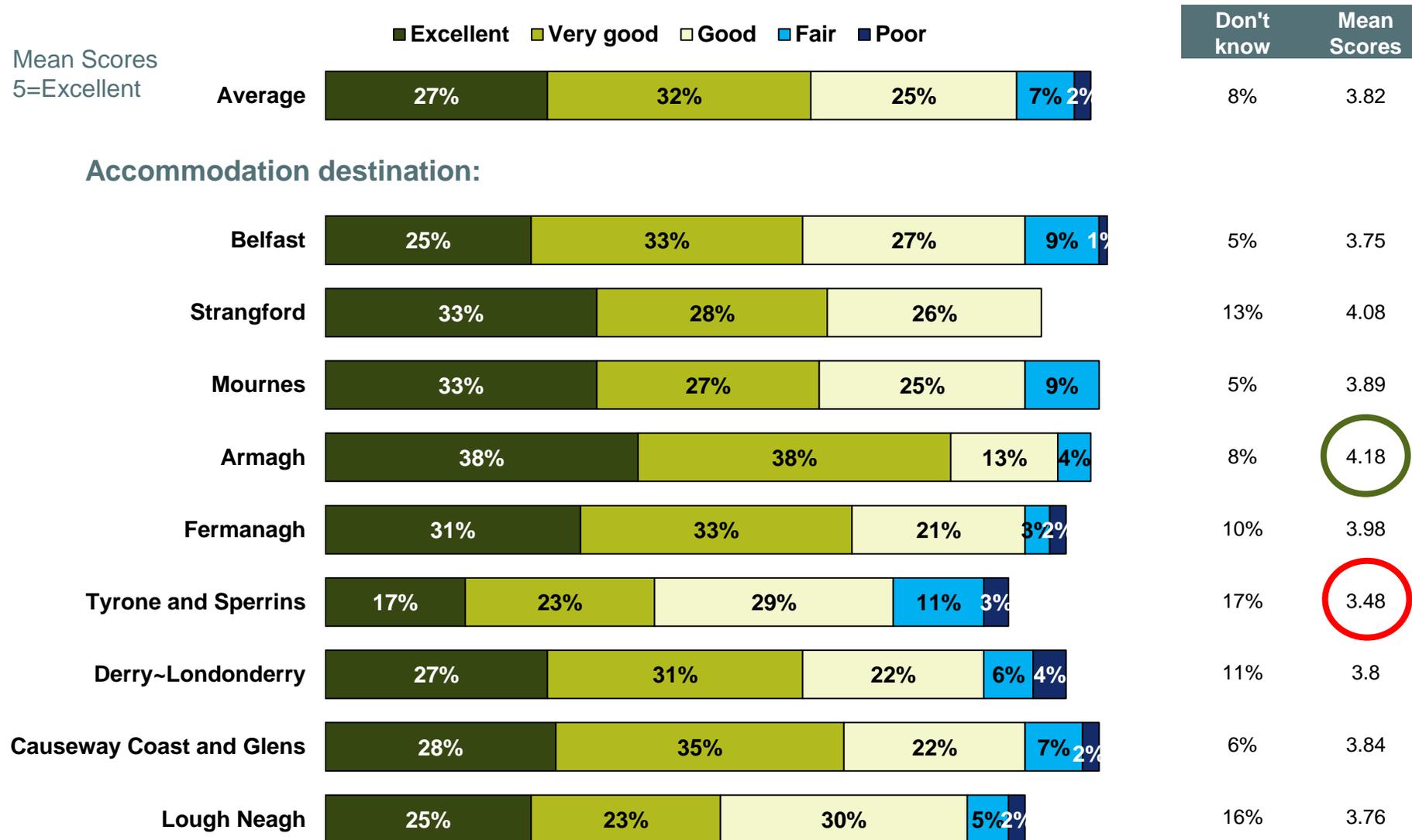
Rating - Staff telling what was unique about the local area: However, staff were less well rated in terms of getting across the idea of 'uniqueness' of places in the region. Of course this sentiment is one that relies on both the availability of a 'unique' product as well as how this is portrayed. Visitors who stayed in paid accommodation in the Armagh\* area gave the highest ratings regarding staff telling them what was unique about the local area.



Q21c Rating of accommodation – staff told you about what was unique about the local area

[ Base: All who stayed in paid for accommodation n=977 ]

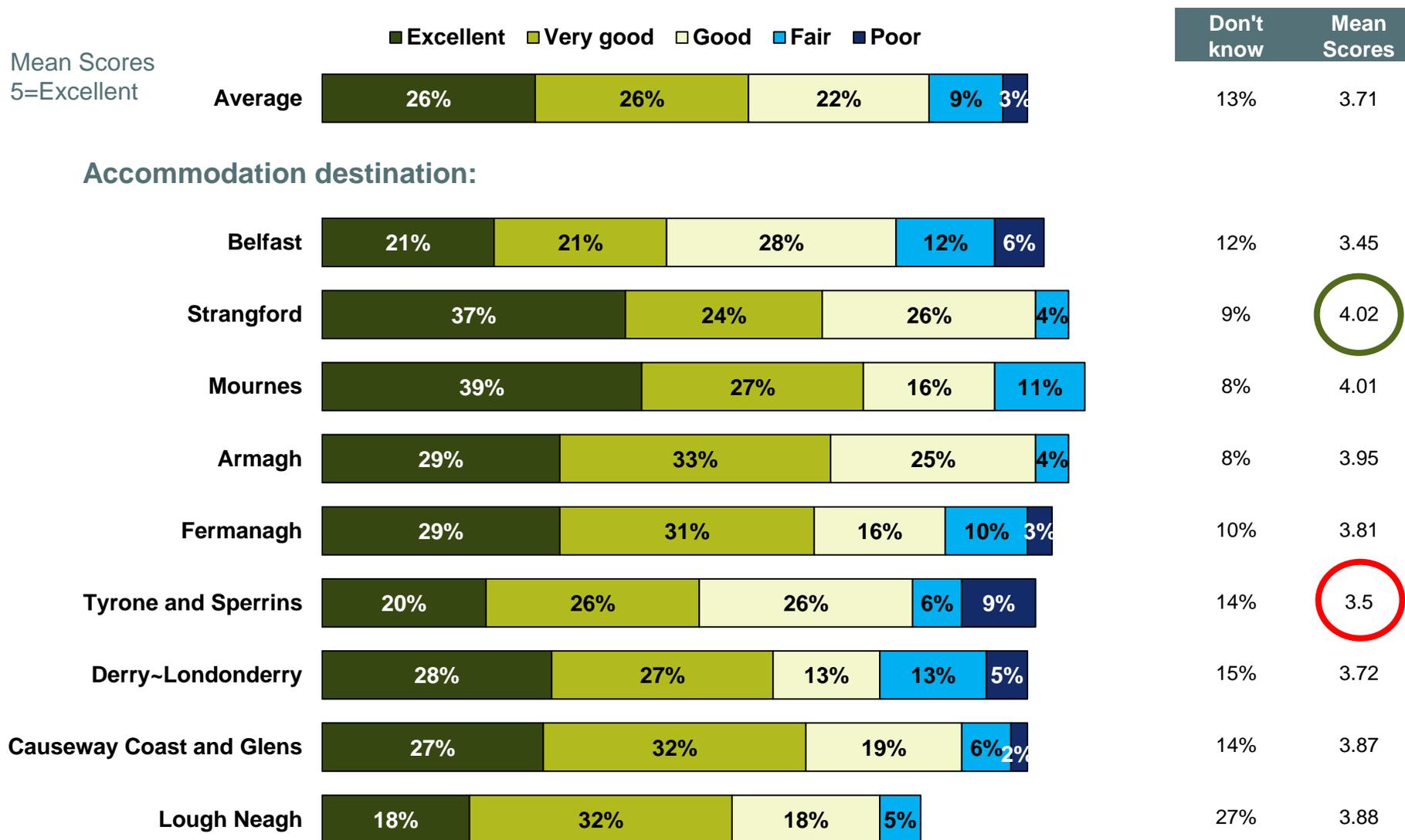
Rating - Value for money: This was a further attribute that is not as well rated, falling below 4 on average. Only those who stayed in paid accommodation in the Armagh\* and Strangford\* areas gave an average rating over 4.



Q21dRating of accommodation – value for money

[ Base: All who stayed in paid for accommodation n=977 ]

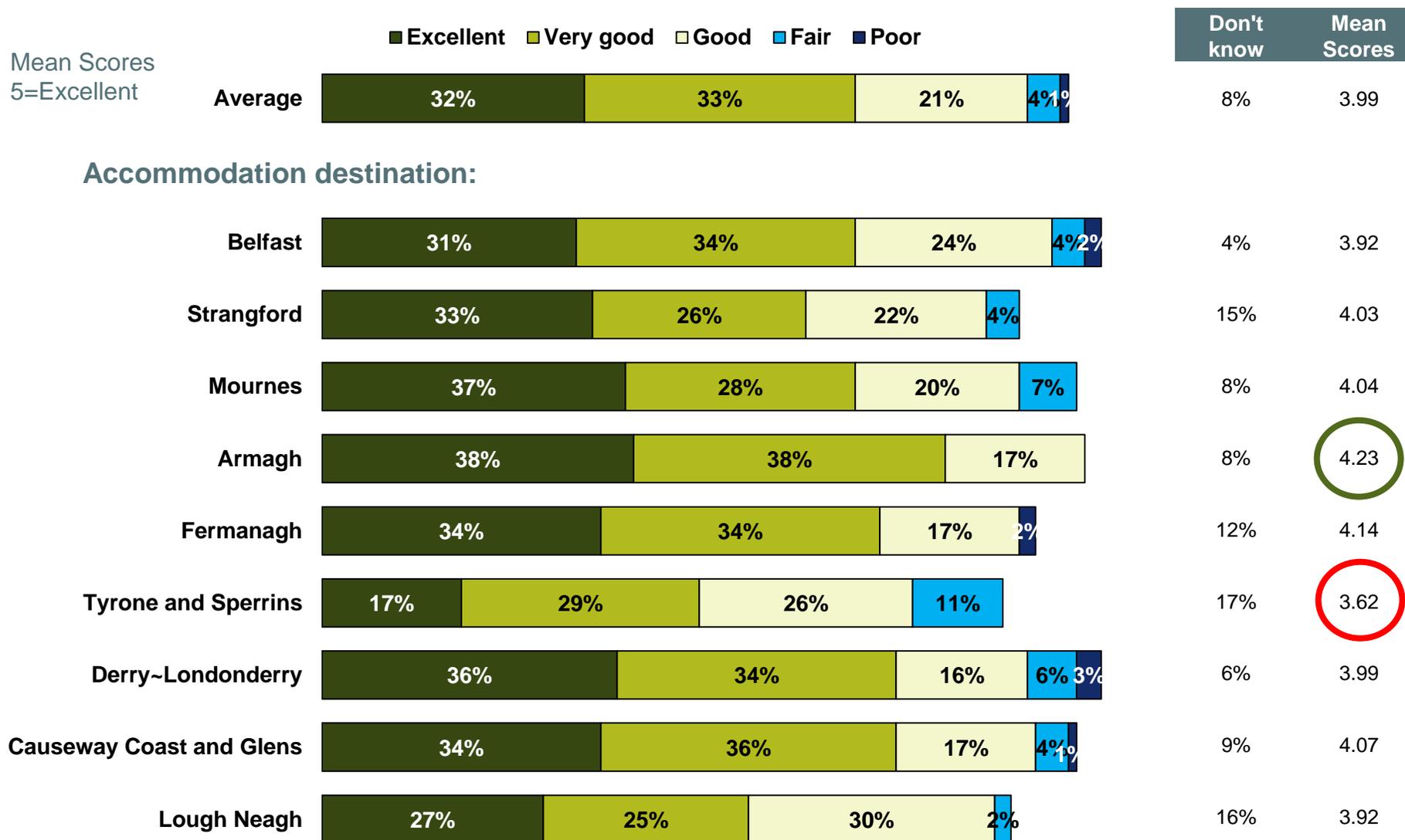
Rating - accommodation that is distinctive to the destination: While few areas (with the exception of Strangford\* and the Mournes) scored particularly well on this metric, it was the Greater Belfast area that was most poorly rated, falling on average closer to 3 (good) than 4 (very good).



Q21e Rating of accommodation that is distinctive to the destination

[ Base: All who stayed in paid for accommodation n=977 ]

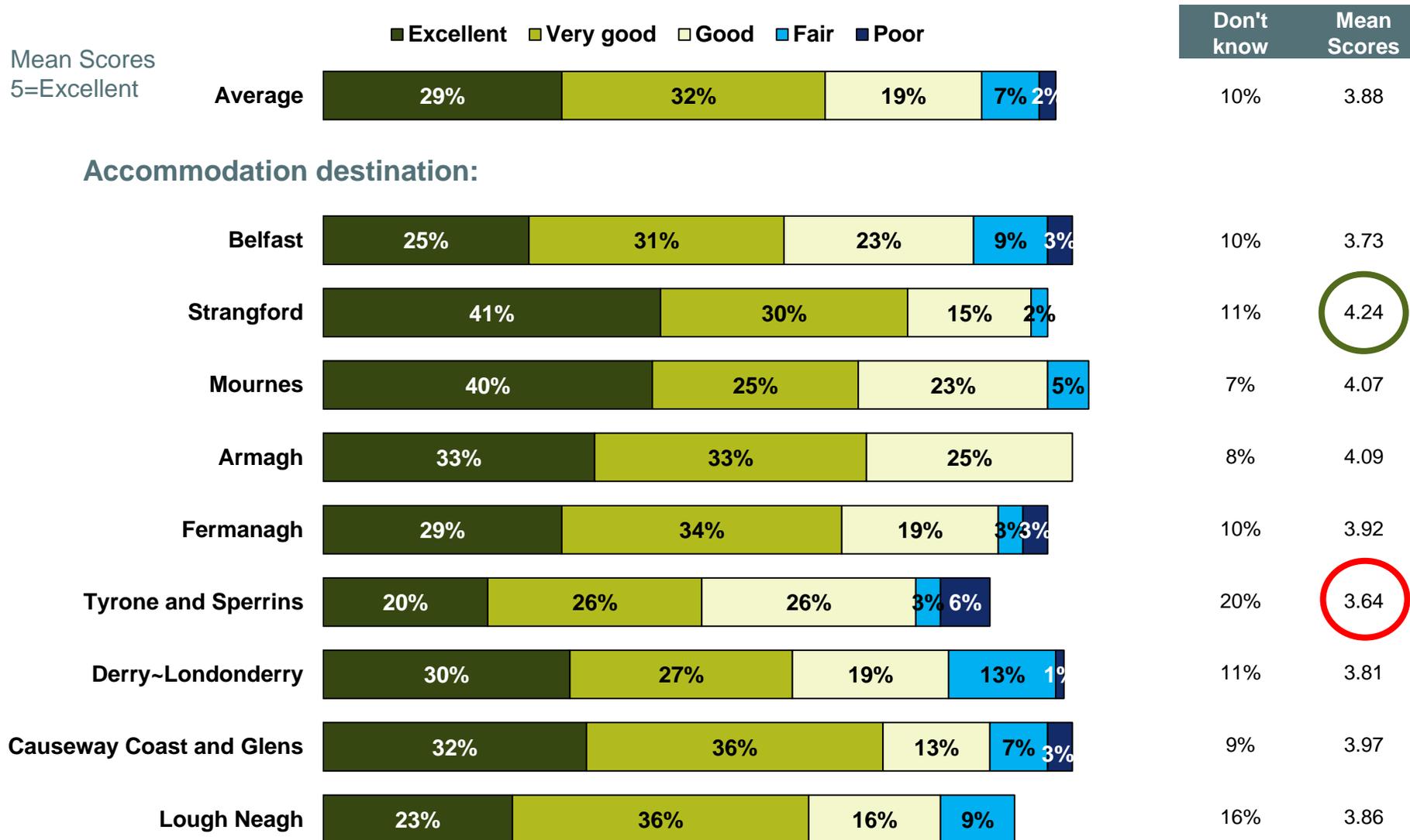
Rating - efficient customer service: With an average rating of almost 4 (very good) overall, views on accommodation in terms of efficient customer service were reasonably good, but just not as highly rated as attributes that relate to the friendliness of staff.



Q21f Rating of accommodation – efficient customer service

[ Base: All who stayed in paid for accommodation n=977 ]

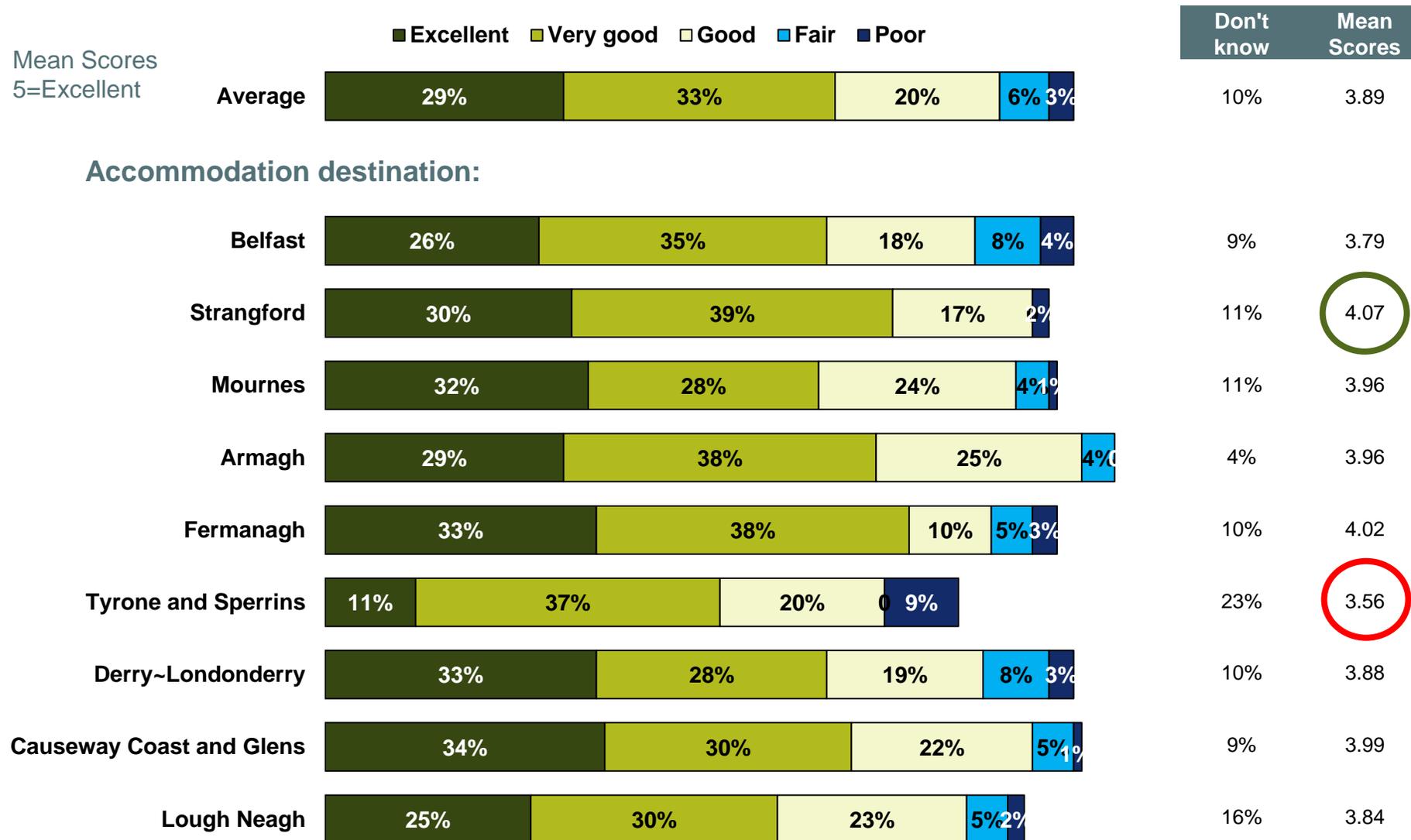
Rating - accommodation as a key part of the holiday experience: Overall ratings on this attribute were comparatively less positive and this varies considerably across the regions, with those staying over in Strangford\*, the Mournes and Armagh\* rating this higher compared to Tyrone & Sperrins\* and Belfast.



Q21g Rating of accommodation on that is a key part of the holiday experience itself

[ Base: All who stayed in paid for accommodation n=977 ] \*Small Bases

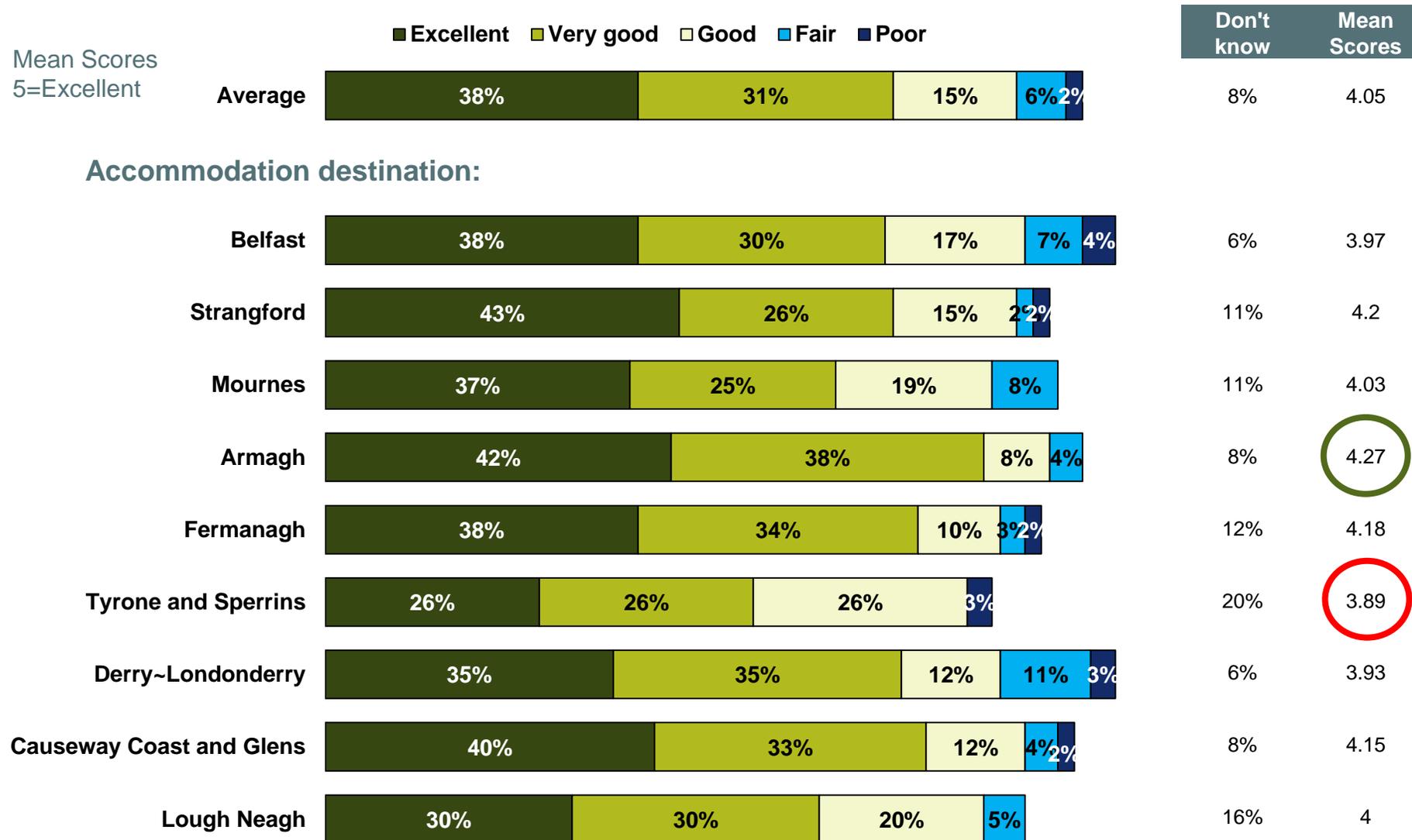
Rating - information on things to do / see in local area: This attribute, albeit a little better rated, is similar to staff telling what is unique about the area, in that it relies on both the availability of 'product' and how well it is portrayed. Greater Belfast is one of the most poorly rated regions on this attribute while Strangford\* and Fermanagh are rated much higher.



Q21h Rating of accommodation – information on things to do / see in local area

[ Base: All who stayed in paid for accommodation n=977 ]

Rating - the staff / hosts help make the trip more enjoyable: With an overall score over 4, this attribute is above average in terms of rating and again it is interesting to see that it relates to people. Again it is visitors who stayed in paid accommodation in the Armagh\* and Strangford\* areas who were most impressed with the staff and hosts making their trip a more enjoyable experience.



Q21i Rating of accommodation – the staff / hosts help to make this trip a more enjoyable experience

[ Base: All who stayed in paid for accommodation n=977 ]

**Rating - Accommodation by Type:** Average Scores across all regions: Not surprisingly it is B&Bs that certainly appear to have the personal touch and where the staff and hosts are most highly rated for being informative, conveying a sense of pride, efficient, providing information about the local area and just making the trip a more enjoyable experience. Self catering accommodation gets the best rating for value for money, while it is also likely to be highly rated on being a key part of the holiday experience.

Mean Scores 5=Excellent

Accommodation Type Used	All n=977	Hotel n=433	Guest House n=53	B&B n=212	Self – Catering n=138	Camping n=61	Caravan n=55	Youth Hostel n=45*
Friendly and informative staff / host	4.14	4.12	4.06	4.34	4.23	3.89	3.98	3.93
Staff convey a sense of pride / belief in the local area	4.05	4.01	4.12	4.27	4.08	3.96	4	3.55
Staff told you about what was unique about the local area	3.75	3.65	3.86	4.15	3.83	3.63	3.61	3.2
Value for money	3.82	3.74	3.65	3.89	4.02	3.56	3.82	3.84
Accommodation that is distinctive to the destination	3.71	3.6	3.73	3.87	3.98	3.78	3.69	3.36
Efficient customer service	3.99	4.04	3.86	4.08	4.07	3.75	3.85	3.68
Accommodation that is a key part of the holiday experience itself	3.88	3.85	3.94	3.94	4.23	3.74	3.91	3.23
Information on things to do / see in local area	3.89	3.84	3.92	4.02	4.03	3.67	3.88	3.7
The staff / hosts help to make this trip a more enjoyable experience	4.05	4.04	3.98	4.23	4.18	3.89	3.83	3.7

# Experience & Advocacy

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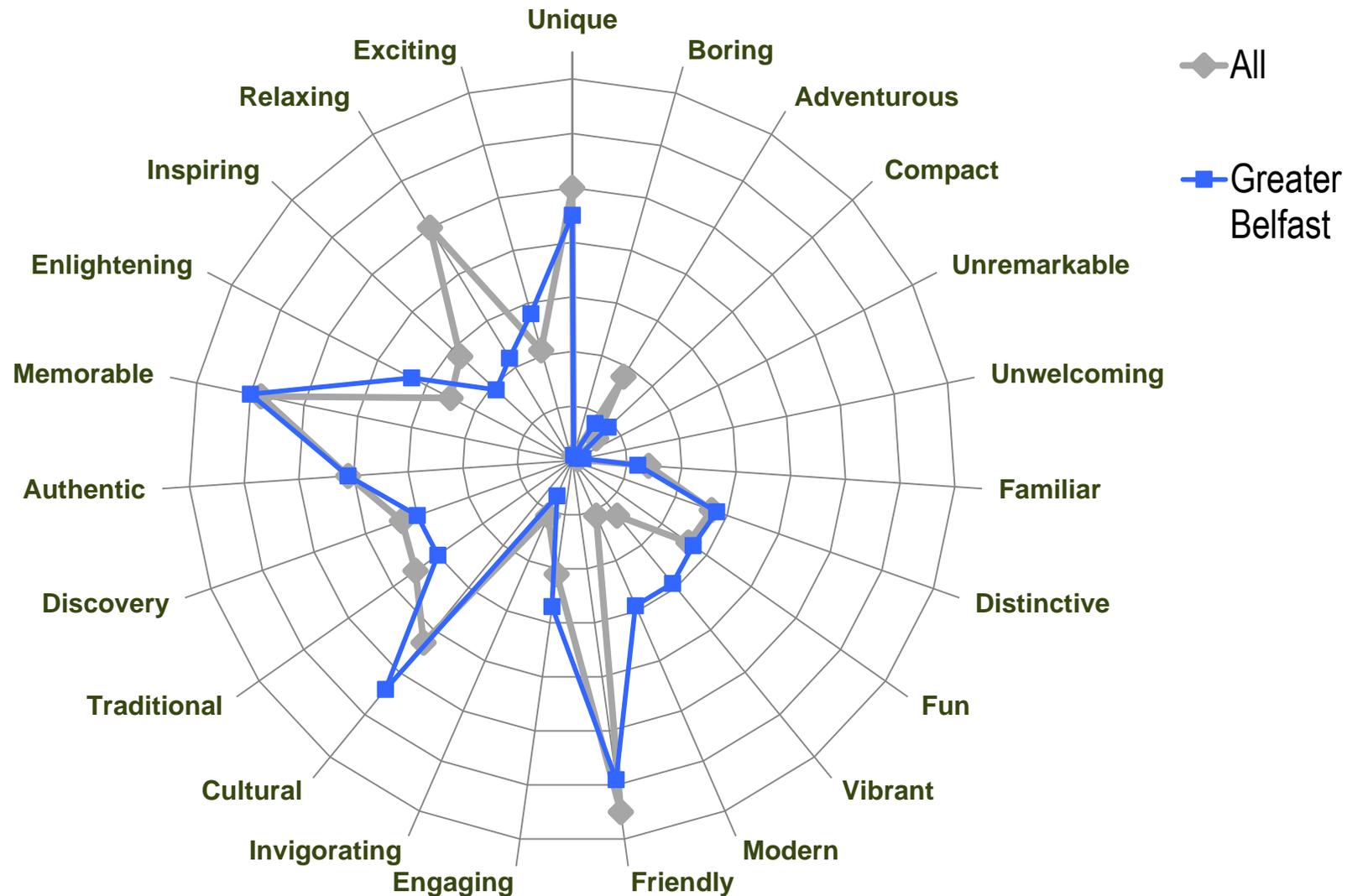
Words chosen to describe destination: The table below shows a summary of the words chosen to describe each destination by visitors and show the stand out words for each. Friendly was the one word chosen within the top three for every single region, again highlighting the people as an key asset to the Tourism offering in NI. These are displayed separately on the following charts.

Interview Destination →	Greater Belfast n=290	Strang- ford n=184	The Mournes n=194	Armagh N=99	Ferma- nagh n=124	Tyrone & Sperrins n=140	Derry- London- Derry n=177	The Causeway Coast & Glens n=410	Lough Neagh and surround- ing area n=178
Unique	45%	36%	57%	26%	36%	31%	58%	74%	39%
Exciting	28%	8%	26%	11%	15%	15%	19%	31%	11%
Relaxing	22%	68%	71%	34%	61%	39%	28%	52%	78%
Inspiring	19%	26%	42%	12%	23%	21%	27%	42%	20%
Enlightening	33%	18%	14%	28%	19%	34%	44%	21%	13%
Memorable	60%	43%	63%	42%	48%	56%	58%	73%	46%
Authentic	41%	35%	37%	33%	44%	42%	55%	42%	30%
Discovery	30%	32%	32%	26%	38%	34%	31%	37%	29%
Traditional	30%	39%	36%	39%	34%	46%	41%	30%	28%
Cultural	54%	36%	27%	42%	49%	51%	58%	40%	30%
Invigorating	7%	7%	30%	3%	6%	6%	5%	17%	6%
Engaging	27%	18%	20%	13%	17%	29%	27%	20%	17%
Friendly	59%	64%	63%	66%	73%	71%	79%	60%	63%
Modern	29%	4%	4%	5%	6%	8%	16%	6%	9%
Vibrant	29%	5%	9%	5%	11%	6%	20%	13%	7%
Fun	27%	18%	25%	18%	21%	32%	19%	30%	29%
Distinctive	28%	22%	24%	19%	23%	23%	36%	34%	22%
Familiar	12%	17%	23%	12%	14%	11%	7%	11%	21%
Unwelcoming	2%	1%	0	0	0	1%	1%	1%	0
Unremarkable	1%	1%	1%	2%	1%	1%	2%	*	2%
Compact	9%	5%	8%	9%	3%	4%	15%	2%	1%
Adventurous	8%	11%	42%	4%	23%	12%	3%	29%	15%
Boring	1%	2%	1%	1%	1%	0	1%	*	1%
None of these	2%	4%	1%	6%	0	1%	0	1%	2%

Q.30 Words to describe destination

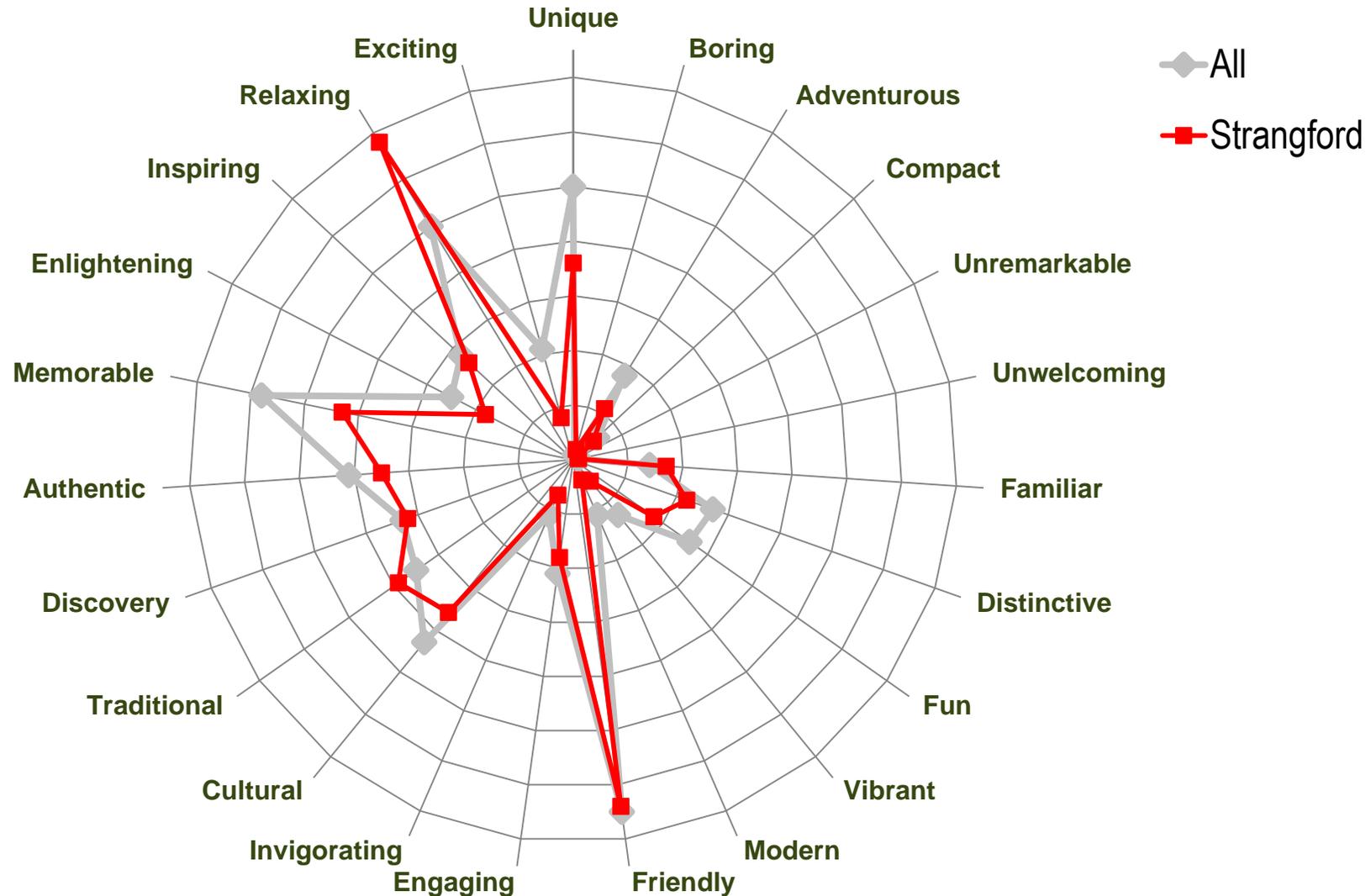
[ Base: All Respondents n=1796]

Words chosen to describe destination: The most commonly used word used to describe the Greater Belfast area was memorable cited by 6 in 10 visitors, higher than for most other regions. Friendly and cultural were also commonly cited by visitors to the Greater Belfast area. Not surprisingly it was one of the regions least likely to be described as relaxing or traditional.



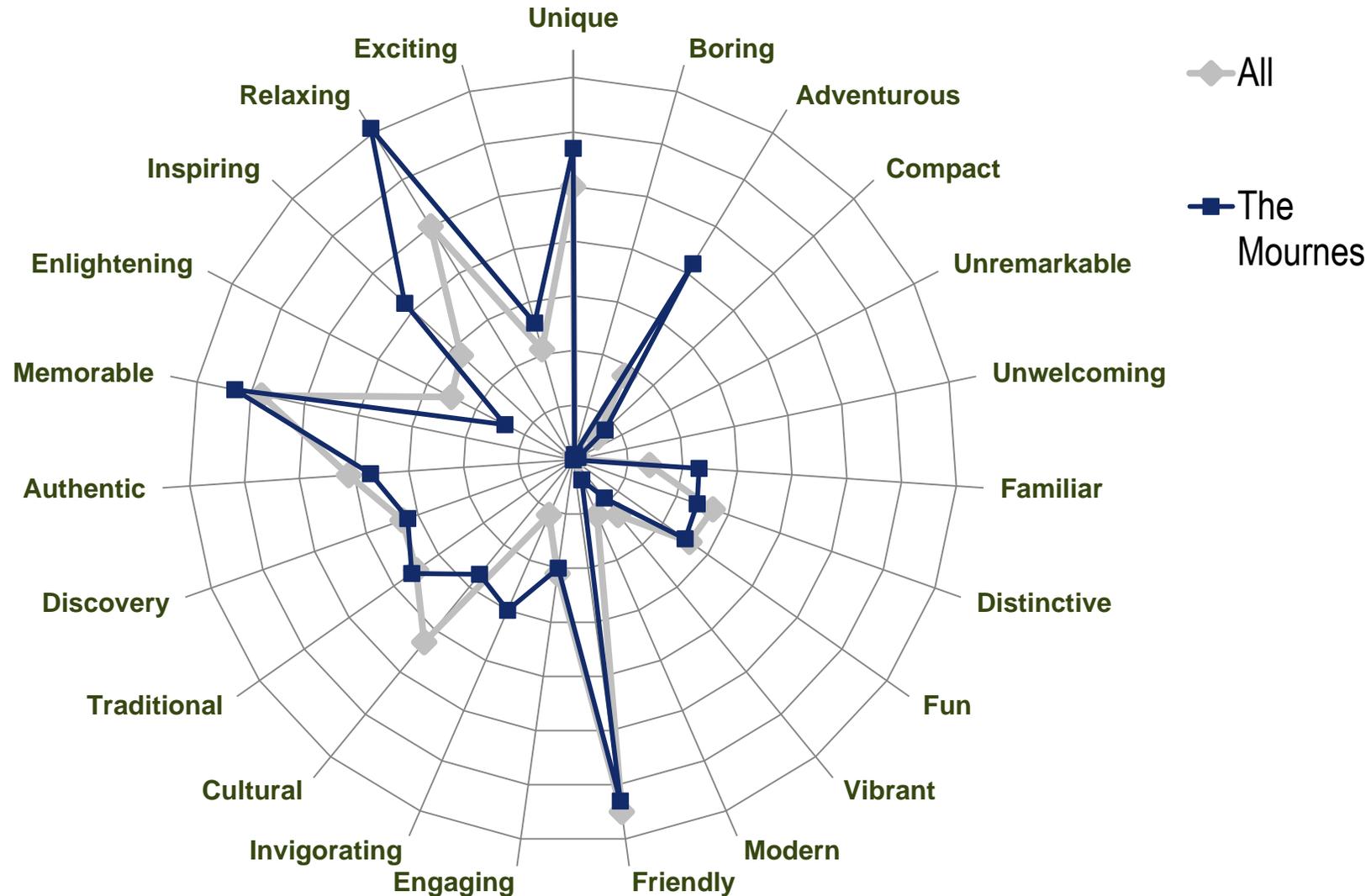
Q.30 Words to describe destination  
 [ Base: All respondents n=1796 ]

Words chosen to describe destination: Almost 7 in 10 visitors to the Strangford area described the area as relaxing, significantly higher than the NI average. Almost two thirds of visitors also described the area as friendly, in line with the NI average. However, compared to most others few visitors chose adjectives such as exciting, vibrant or modern.



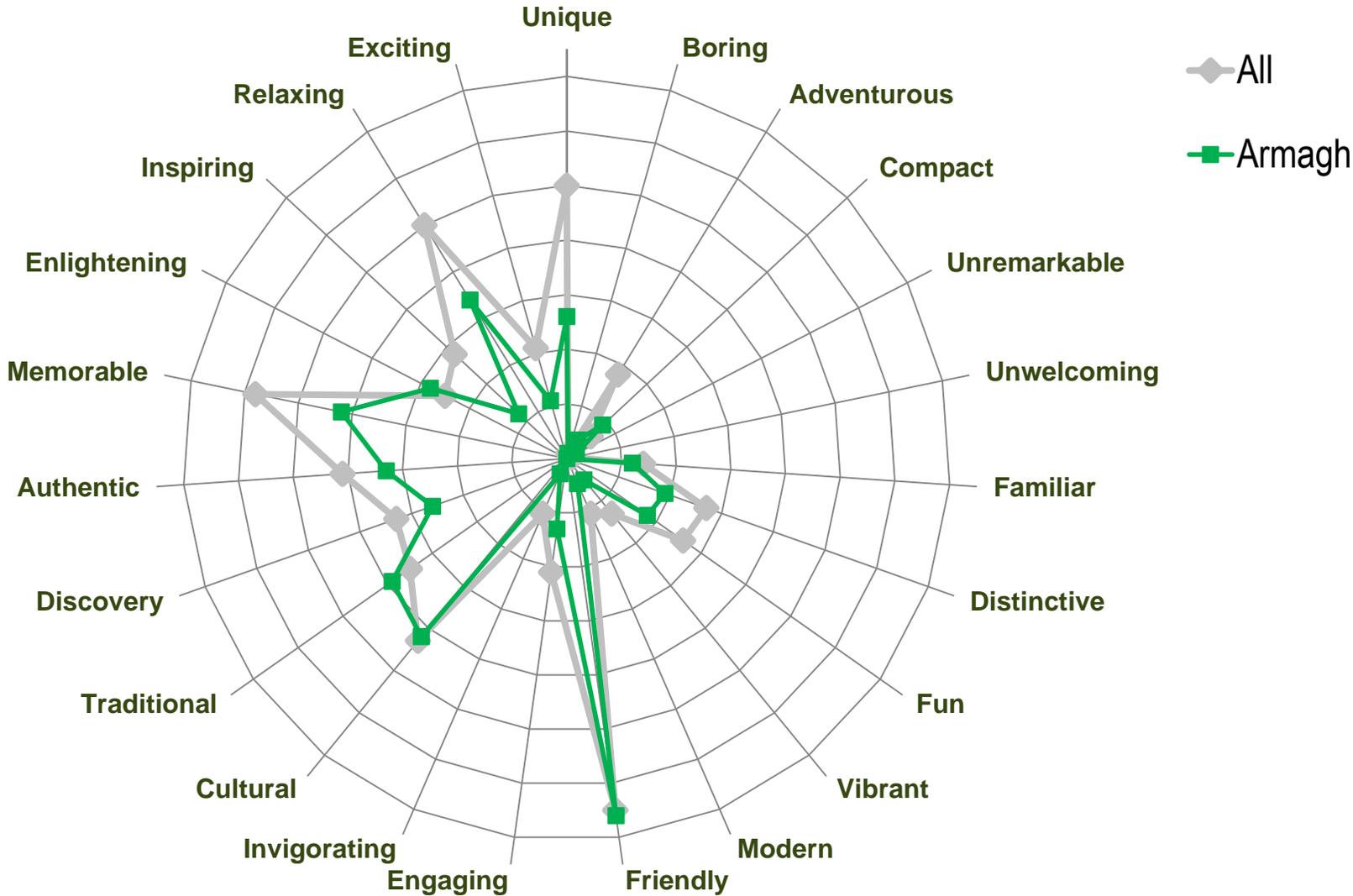
Q.30 Words to describe destination  
 [ Base: All respondents n=1796 ]

Words chosen to describe destination: Relaxing, memorable and friendly were the key terms chose to describe the Mourne's by those who had visited. However, this area was more likely than most other regions to also be described as unique, adventurous and invigorating.



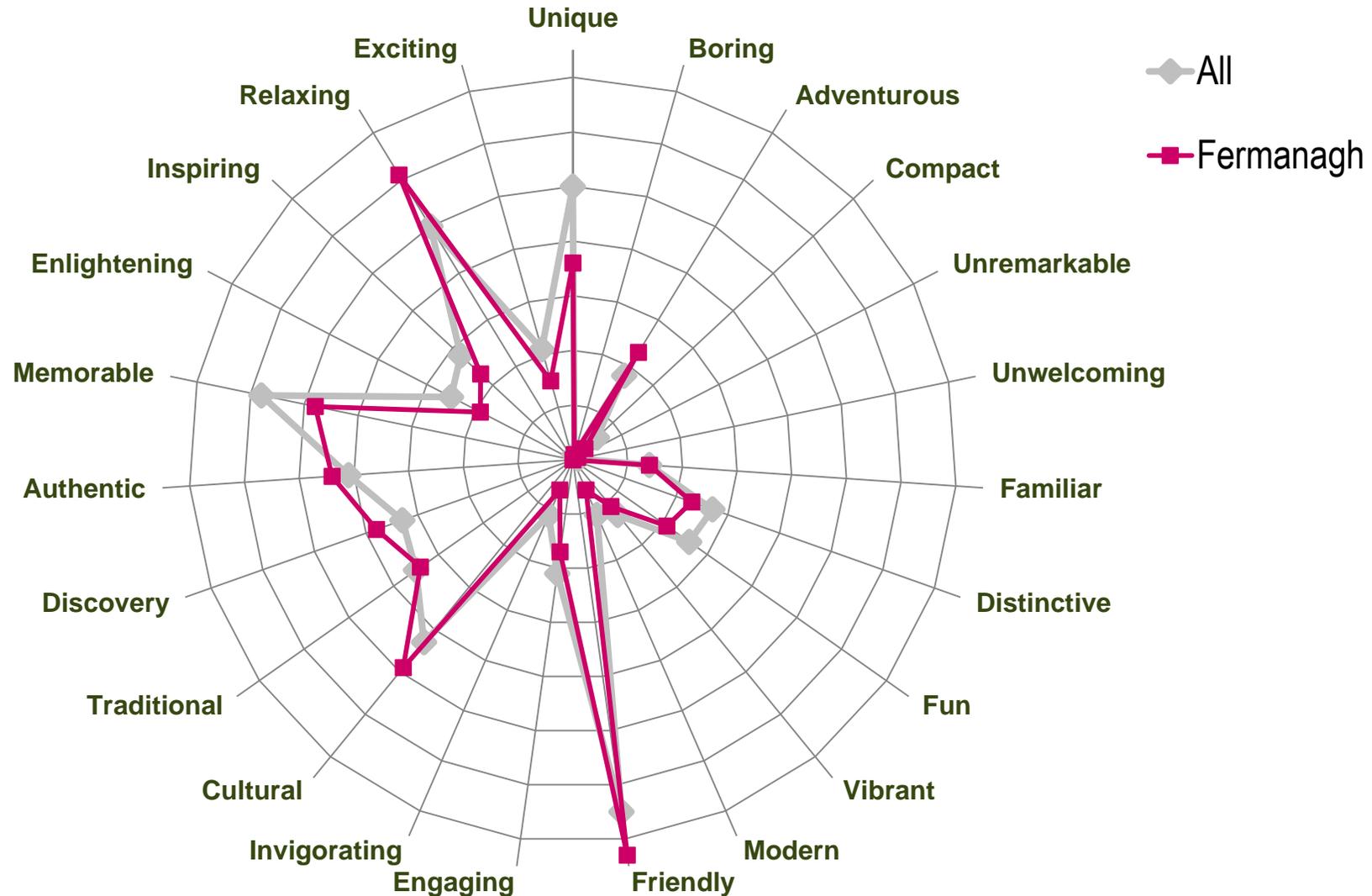
Q.30 Words to describe destination  
 [ Base: All respondents n=1796 ]

Words chosen to describe destination: Friendly, again, was a commonly cited description of the Armagh area along with memorable and cultural. But it was one of the regions least likely to be described as exciting or inspiring.



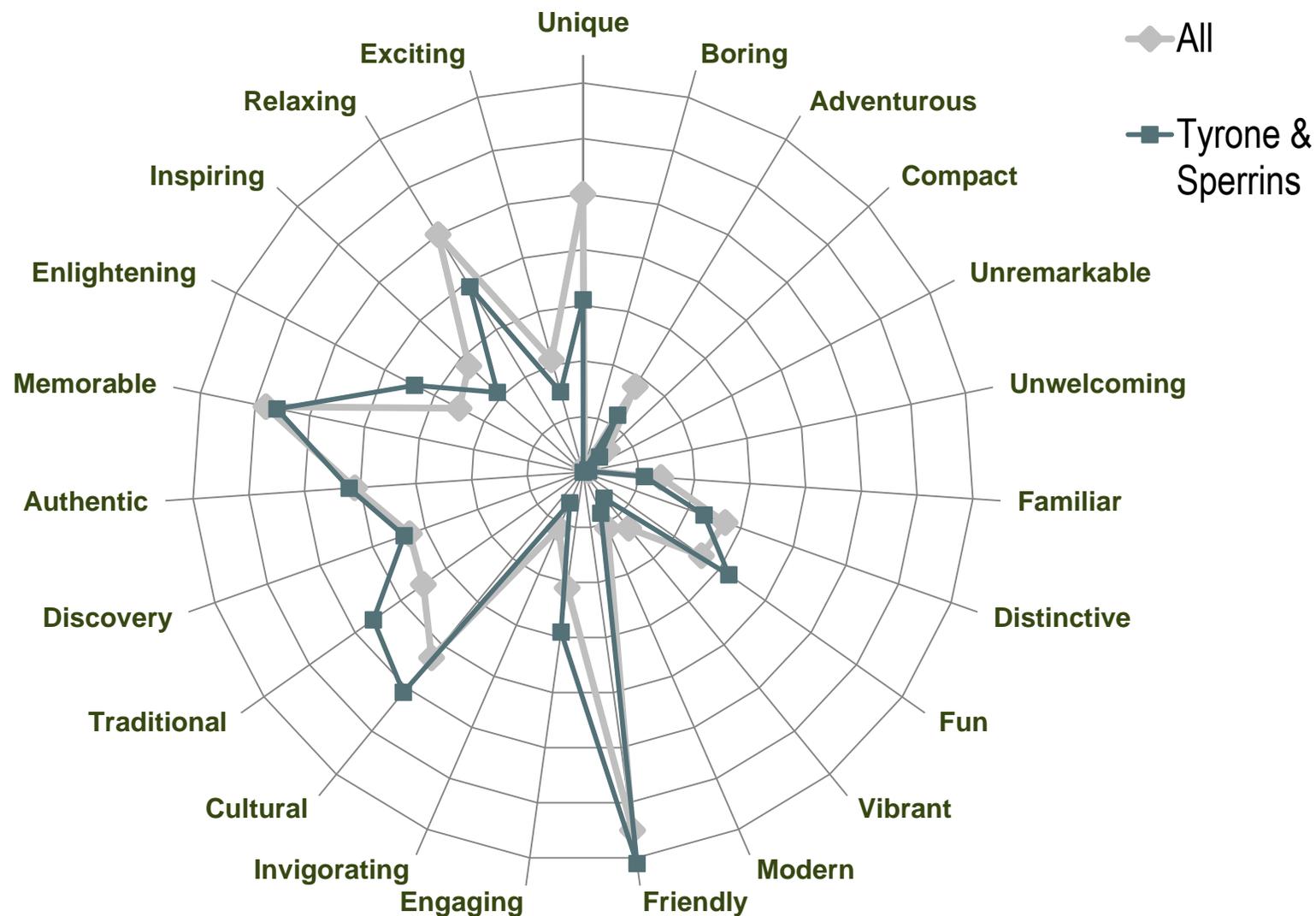
Q.30 Words to describe destination  
 [ Base: All respondents n=1796 ]

Words chosen to describe destination: Friendly was the key description of the Fermanagh area used by visitors, higher than the average for NI as a whole. The area was also described as relaxing, adventurous and cultural more than the average for Northern Ireland.



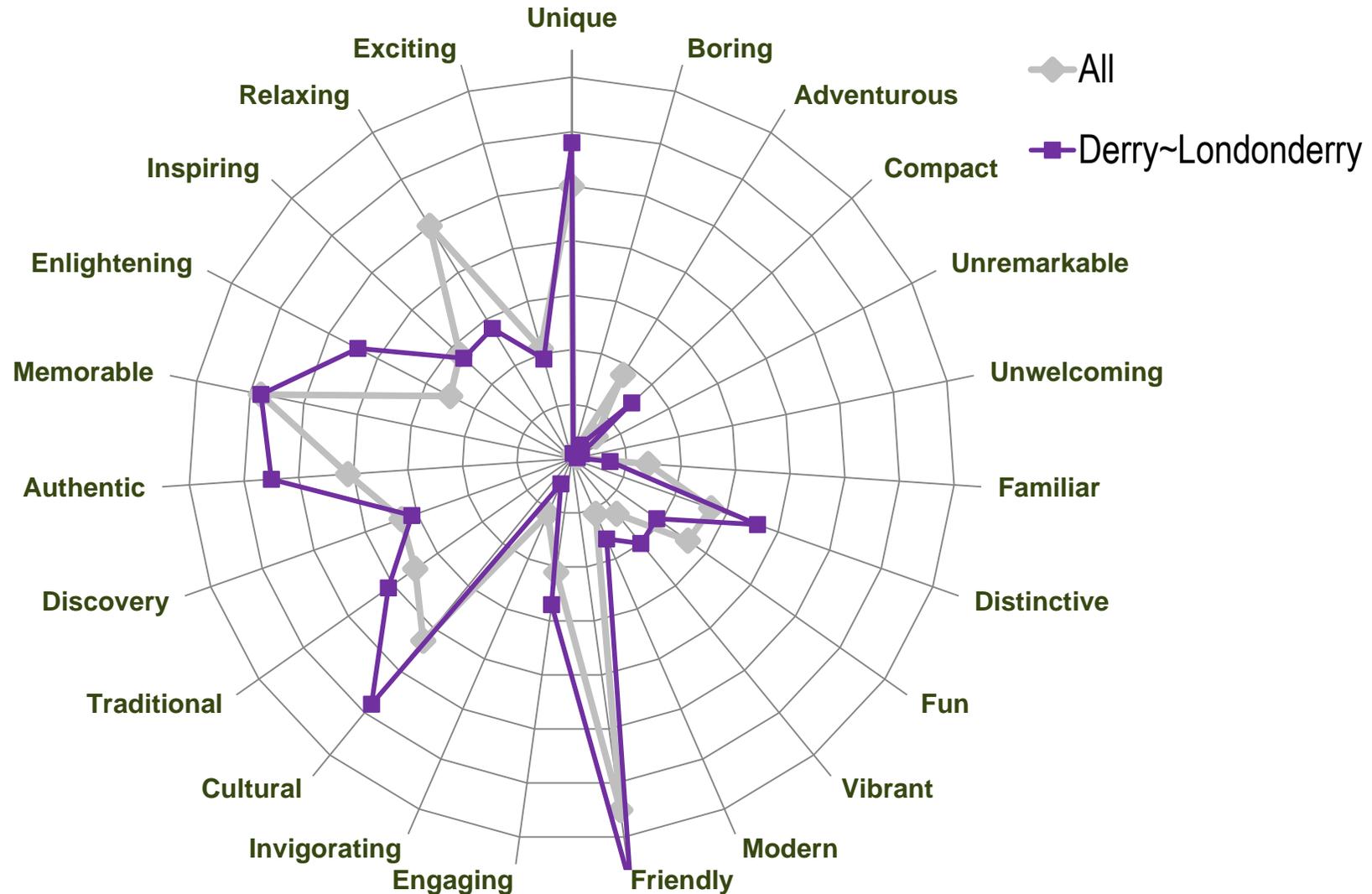
Q.30 Words to describe destination  
 [ Base: All respondents n=1796 ]

Words chosen to describe destination: Key descriptions of the Tyrone and Sperrins area were friendly, cultural, memorable and traditional. The area was also described as more fun and enlightening than most other regions.



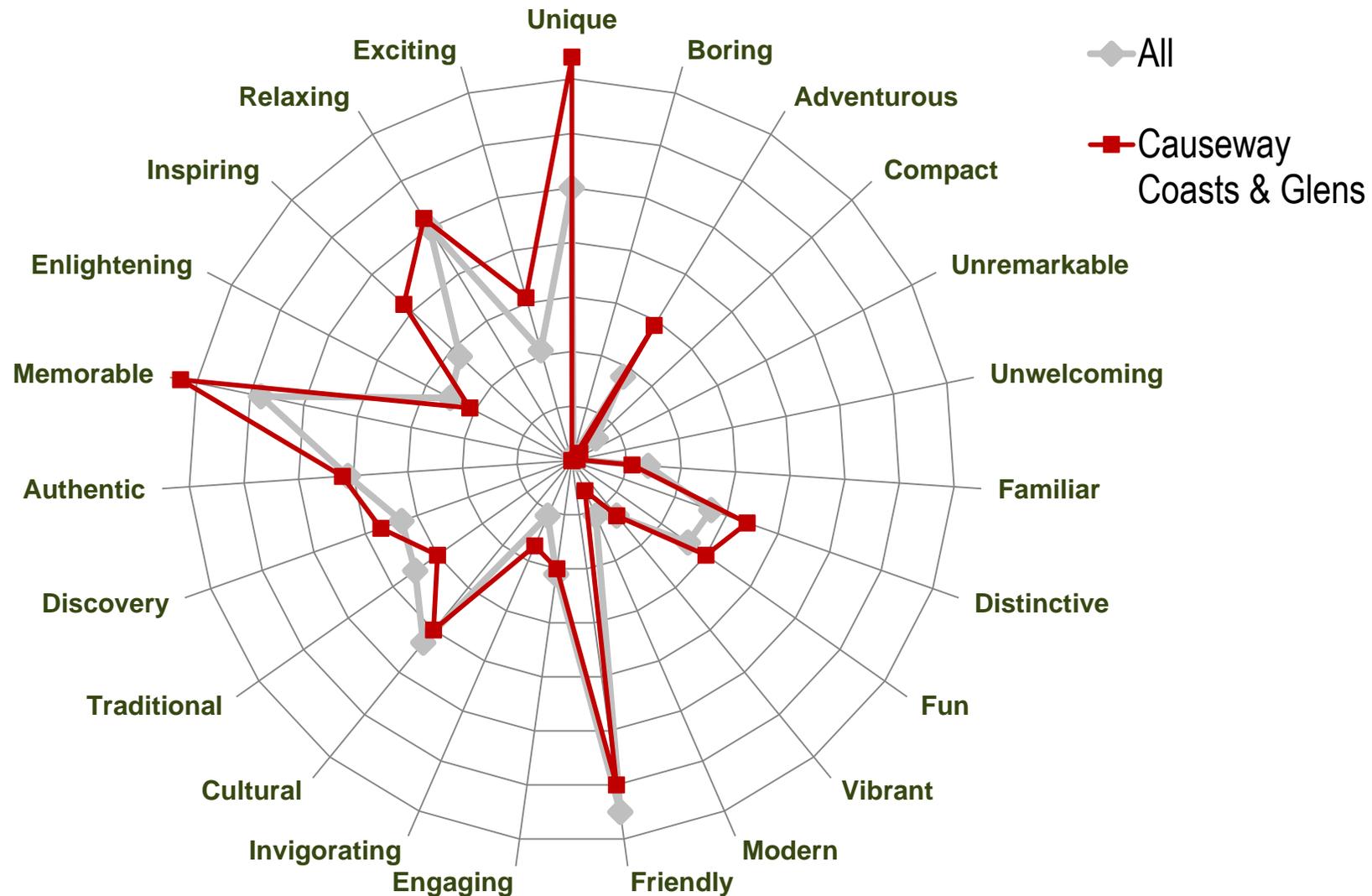
Q.30 Words to describe destination  
 [ Base: All respondents n=1796 ]

Words chosen to describe destination: Derry-Londonderry was described by visitors as friendly more so than any other area with 8 in 10 visitors describing the area in this way. The city was also more likely than most to be described as unique, enlightening, distinctive, cultural, authentic and vibrant but less likely to be seen as relaxing.



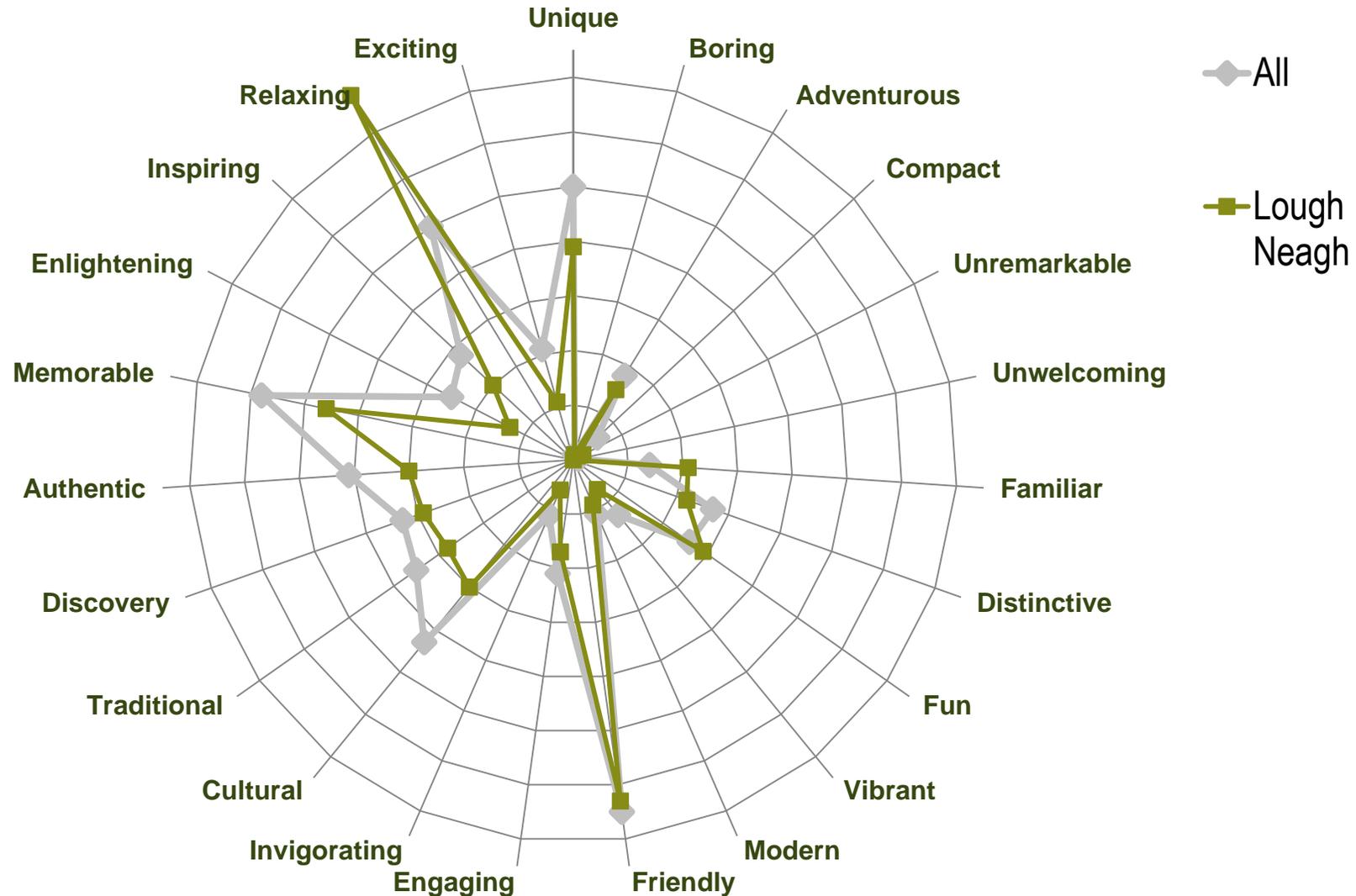
Q.30 Words to describe destination  
 [ Base: All respondents n=1796 ]

Words chosen to describe destination: Memorable and unique were the key stand out descriptions of the Causeway Coast and Glens area by visitors, more commonly cited than for any other area. Descriptions of being adventurous, distinctive, fun and inspiring were also higher than the NI average.



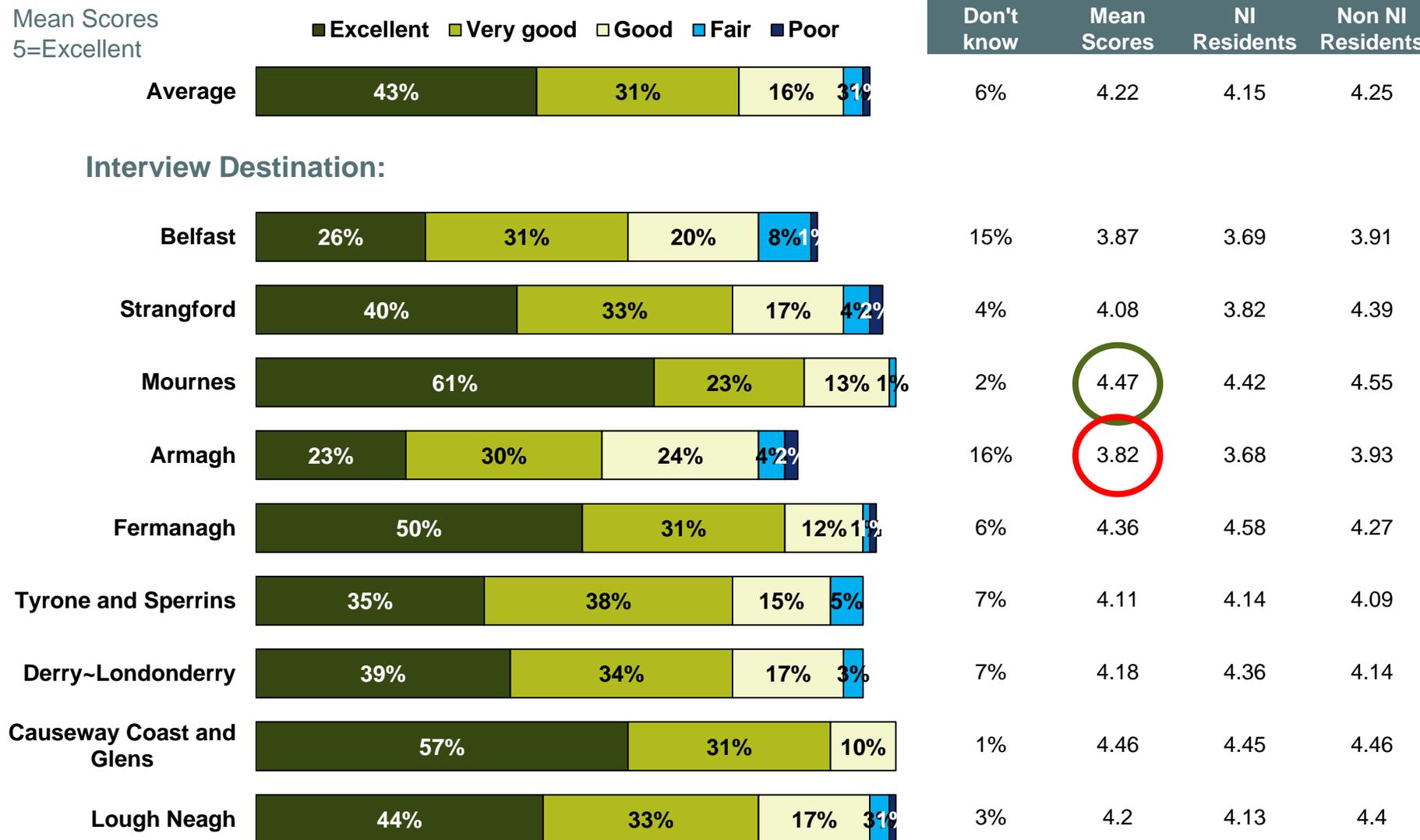
Q.30 Words to describe destination  
 [ Base: All respondents n=1796 ]

Words chosen to describe destination: Key descriptions of the Lough Neagh area were relaxing, more commonly cited than for any other area. This area was also seen as friendly and more likely than most to be fun.



Q.30 Words to describe destination  
 [ Base: All respondents n=1796 ]

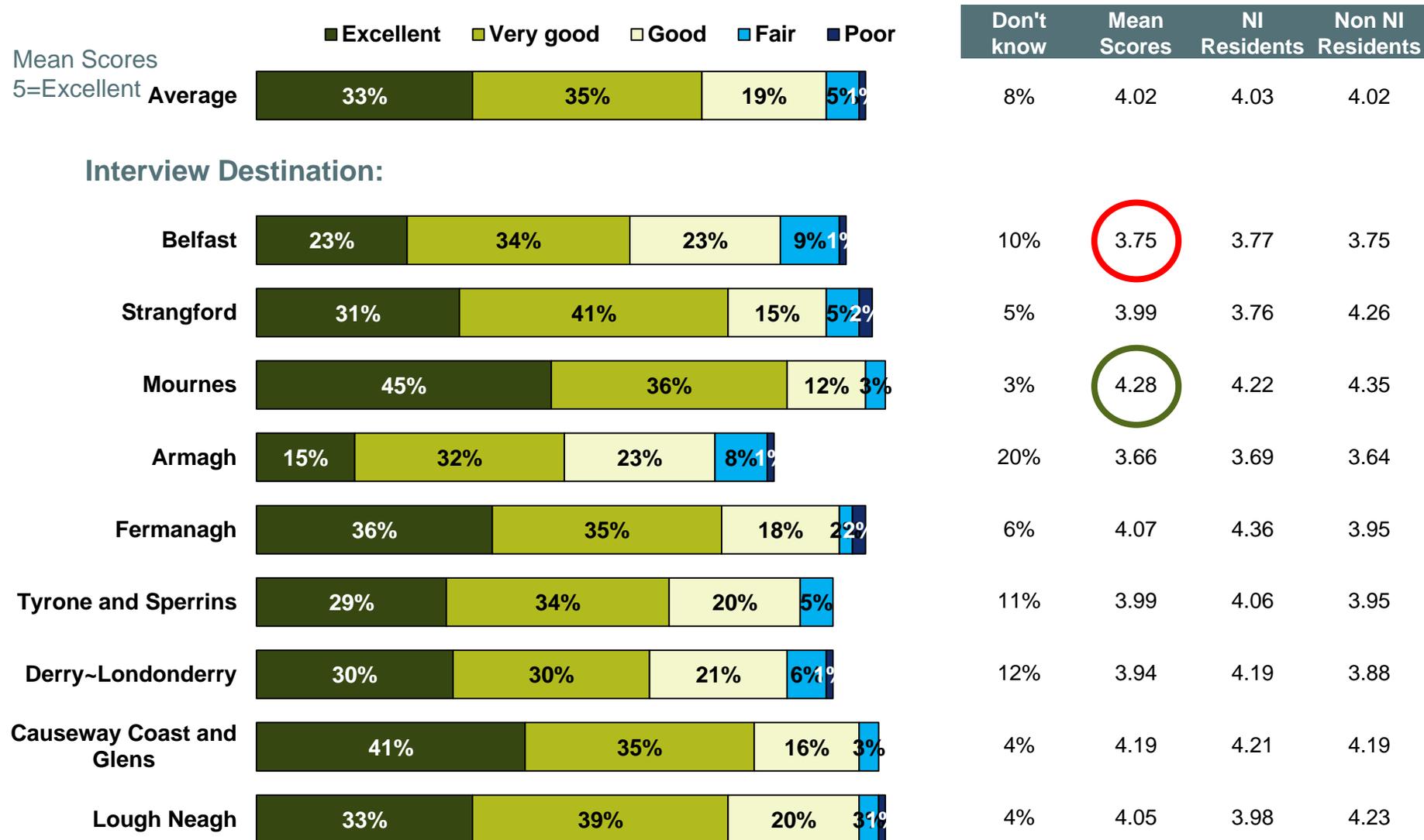
Rating - somewhere to enjoy the scenery of the local area: Ratings for this metric were generally high, one of the highest rated overall of all metrics, with all destinations with the exception of Belfast and Armagh scoring over 4 on average. The Mournes was most highly rated, with 61% of visitors rating this region as excellent, this region was closely followed by the Causeway Coast & Glens and Fermanagh.



Q23a Rating of experiences in destination – somewhere to enjoy the scenery of the local area

[ Base: All respondents n=1796 ]

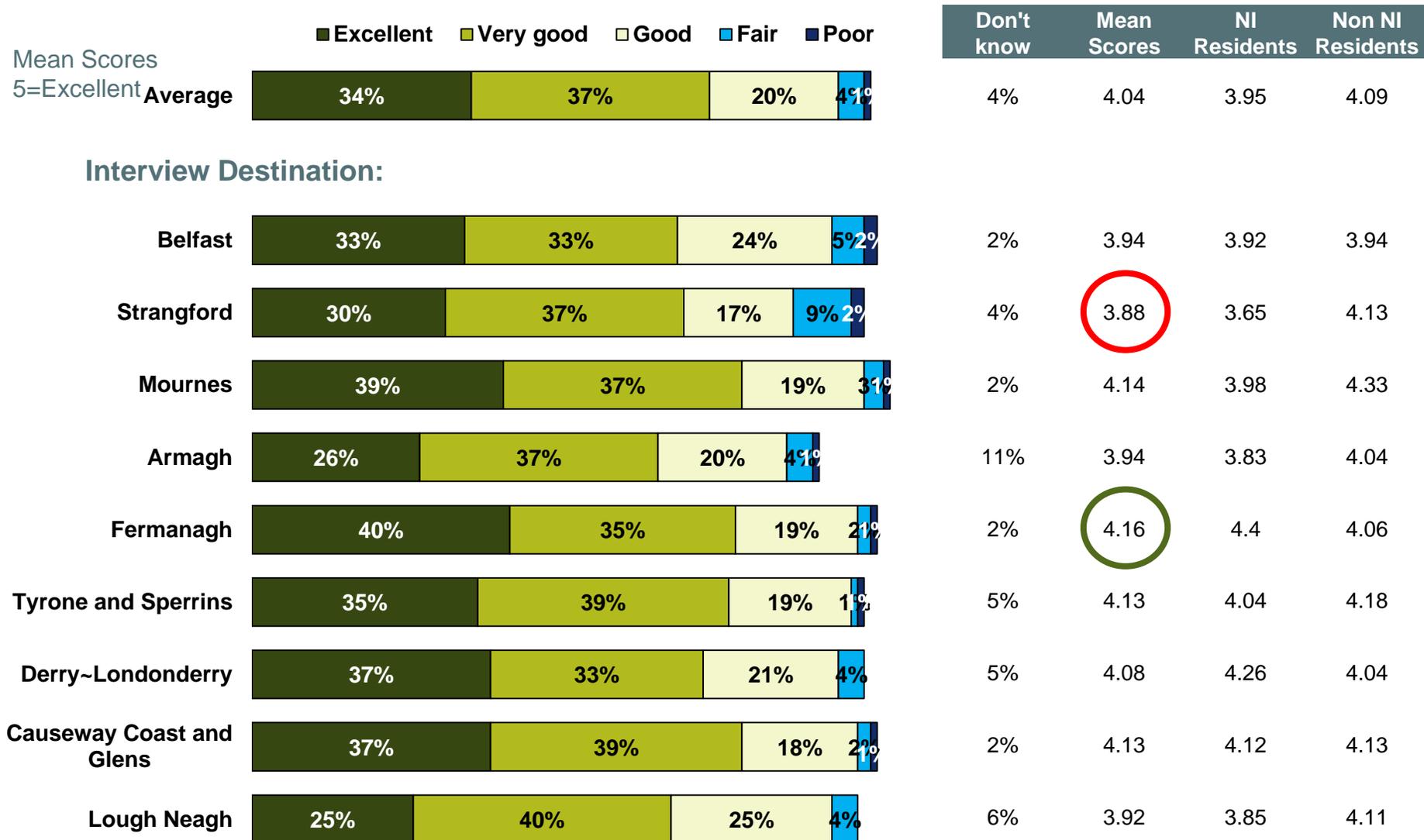
Rating - Somewhere to rest and relax: At just over 4, the overall average rating was also comparatively high for this attribute, with the Mournes, Causeway Coast & Glens and Fermanagh again all receiving greater approbation. On the other-hand, not surprisingly the city destinations were less likely to be seen as somewhere to rest and relax.



Q23b Rating of experiences in destination – somewhere to rest and relax

[ Base: All respondents n=1796 ]

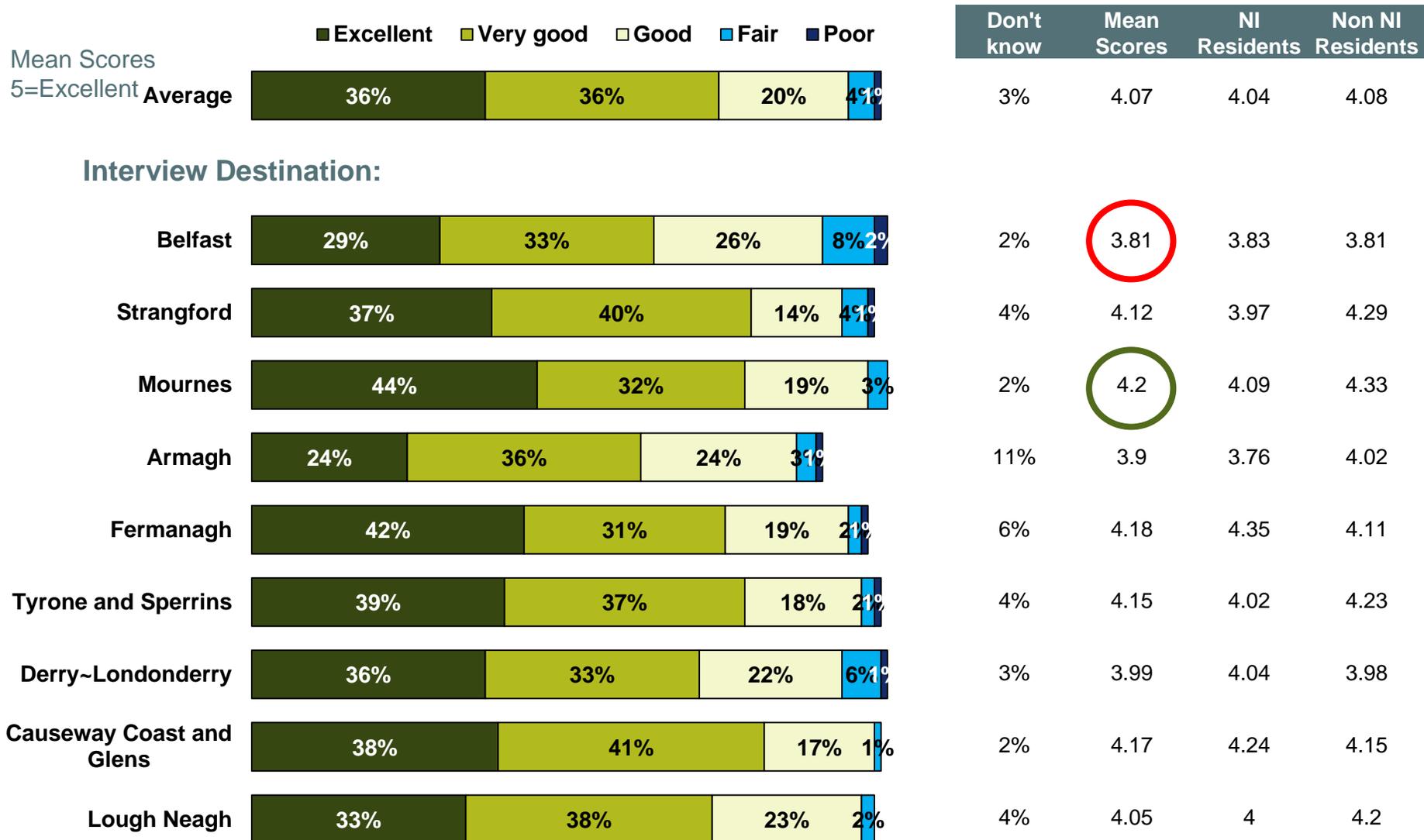
Rating - somewhere with a friendly, genuine welcome: Again at over 4, the average rating was relatively high and most regions if not scoring over 4, were reasonably close to 4, with Fermanagh and the Mournes rated most highly and Strangford least. However, like the Mournes and Lough Neagh, Strangford was rated much more highly by OOS visitors.



Q23c Rating of experiences in destination – somewhere with a friendly, genuine welcome

[ Base: All respondents n=1796 ]

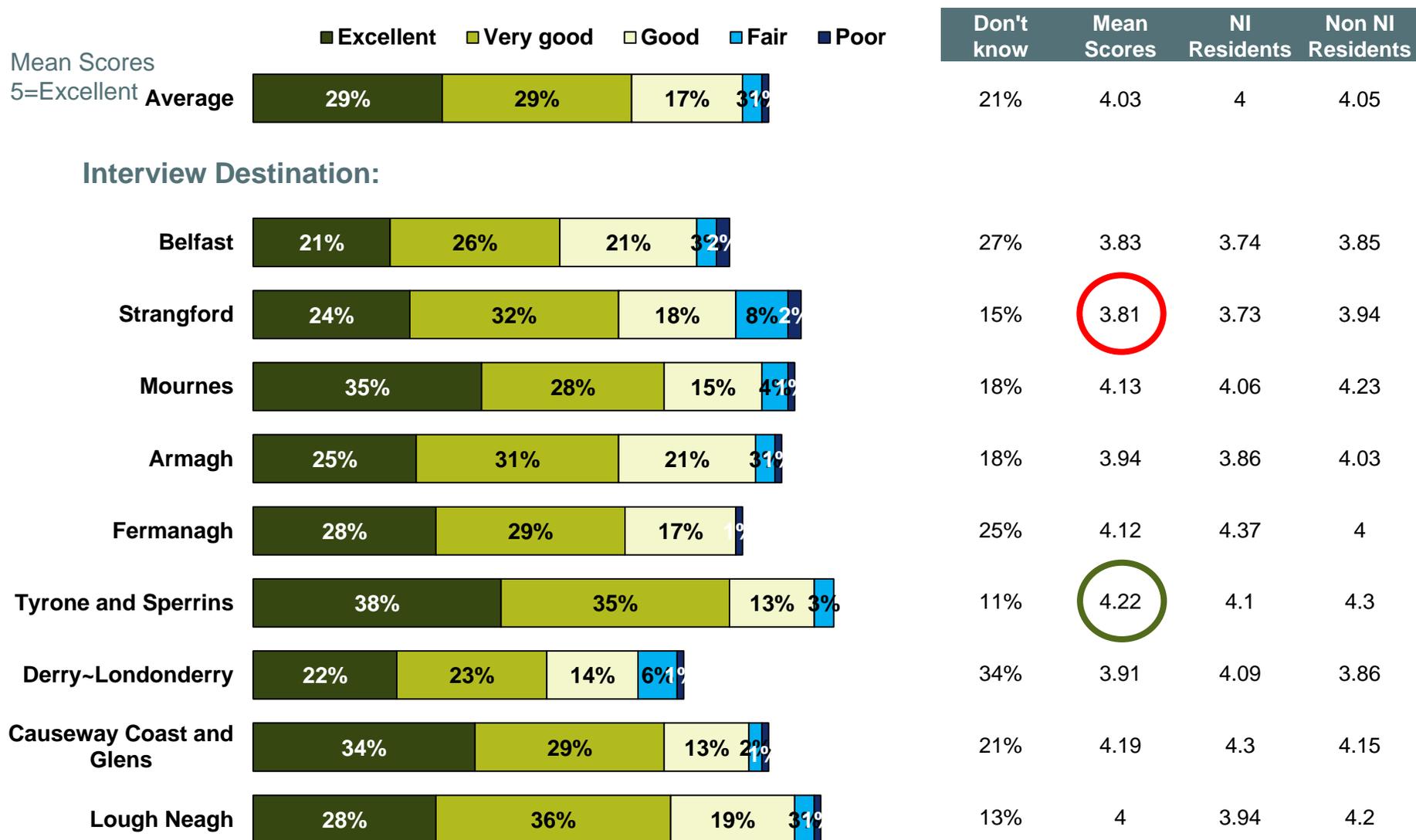
Rating - somewhere you feel safe: Overall most regions in NI were rated relatively highly in terms of somewhere you feel safe. However, the average rating declined somewhat for City destinations, particularly for Belfast. Otherwise visitors to the Mournes felt the most safe closely followed by Fermanagh. OOS visitors to Strangford and the Mournes tended to rate their feelings of safety higher than NI residents.



Q23d Rating of experiences in destination – somewhere you feel safe

[ Base: All respondents n=1796 ]

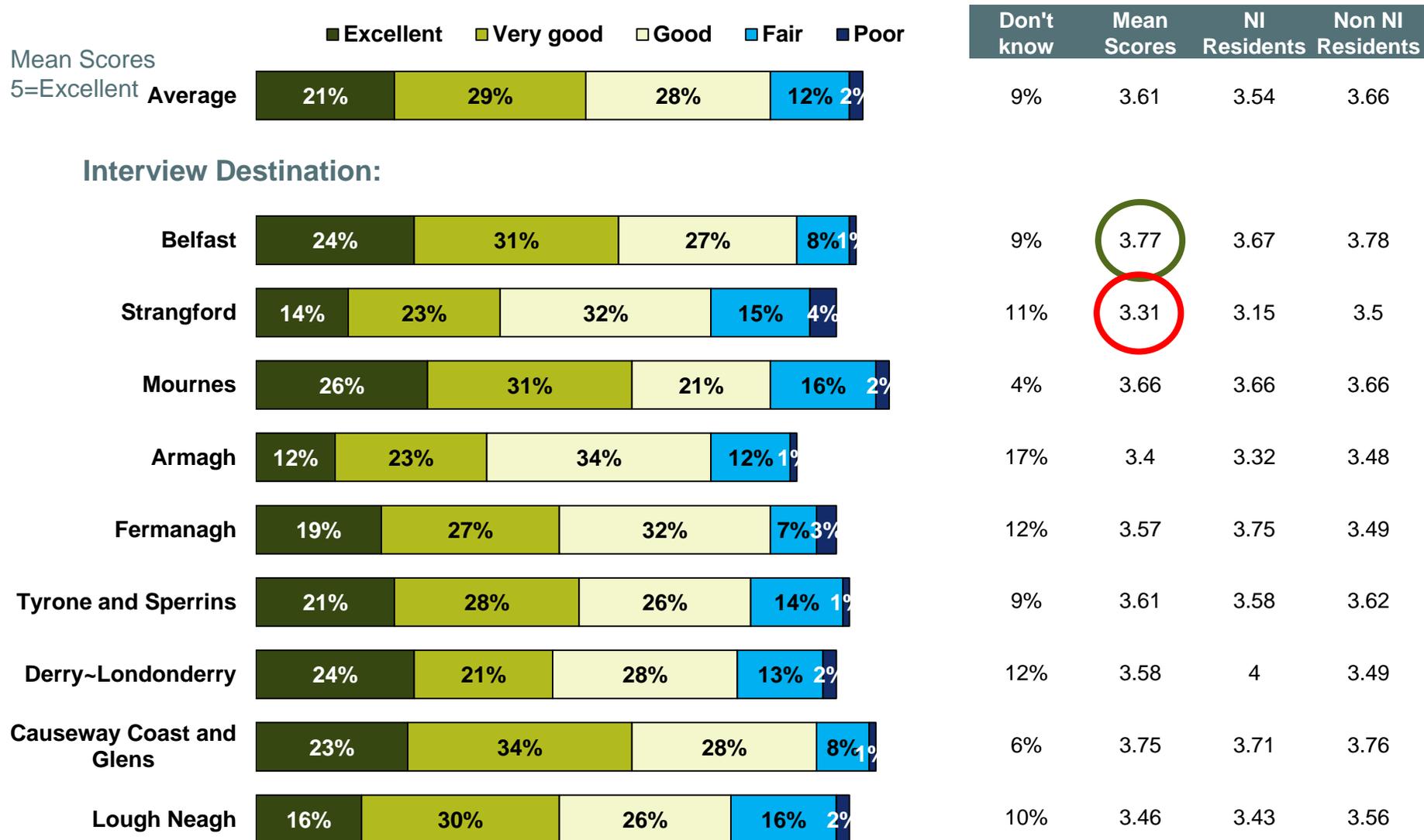
Rating - Somewhere that is good for families with children: More than 1 in 5 overall had no opinion on whether or not the region they had visited was somewhere that is good for families with children, this was especially so for the Derry-Londonderry region, where visitors were least likely to have been accompanied by children on their trip. Otherwise, having loads for children to do was high up in terms of motivation for taking the trip in the first for many others so it was encouraging to see that of those who did rate this attribute, the ratings were relatively positive.



Q23e Rating of experiences in destination – somewhere that is good for families with children

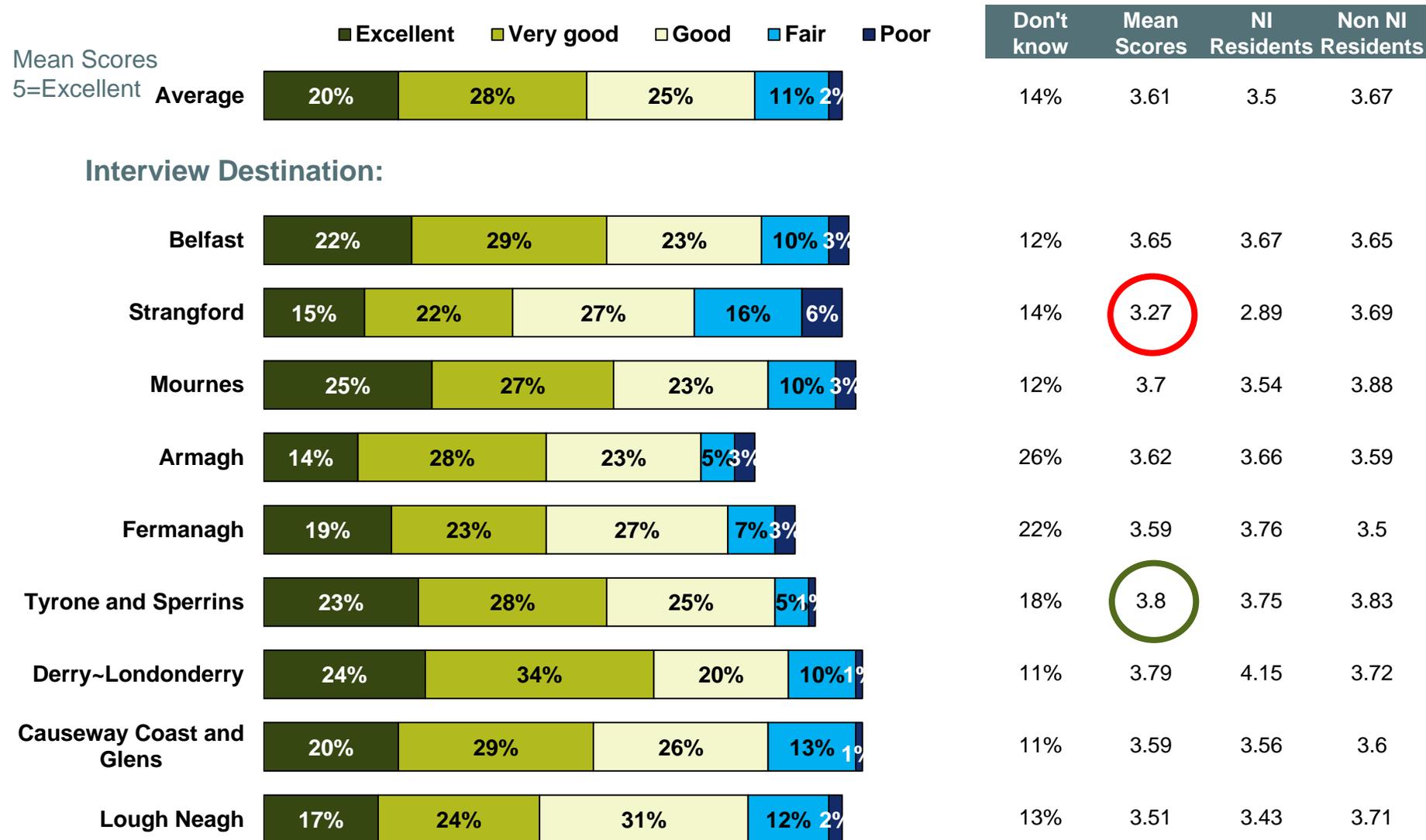
[ Base: All respondents n=1796 ]

Rating - somewhere vibrant and exciting: Overall ratings on this metric were quite poor at well under 4 (between good and very good). As expected Belfast was rated most highly as being somewhere vibrant and exciting but even this score was relatively disappointing and was even lower amongst NI residents. Derry-Londonderry was comparatively well rated by NI residents but not so by OOS visitors.



Q23f Rating of experiences in destination – somewhere vibrant and exciting  
[ Base: All respondents n=1796 ]

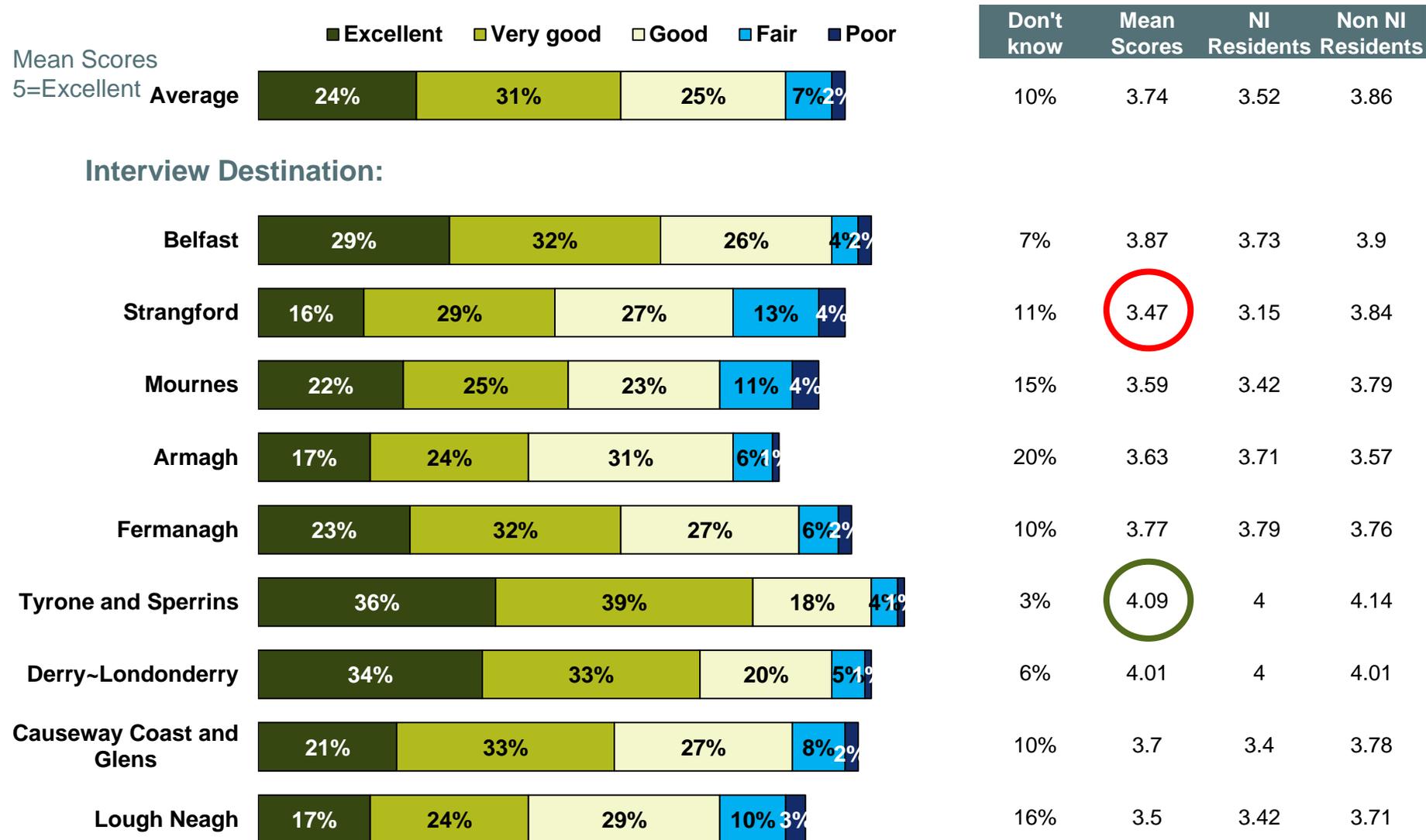
**Rating - Somewhere you could meet and mix with local people:** Many findings have already demonstrated the strength of the people as an asset in terms of Tourism in NI, however when asked to rate the regions as somewhere you could meet and mix with local people, not one region was rated particularly well. The highest ratings for the opportunity to meet and mix with local people were awarded by visitors to the Tyrone and Sperrins and Derry-Londonderry but these were still well below 4 (very good). Even within the ratings given for the Derry-Londonderry area, NI residents gave much more favourable ratings than those visiting from outside NI.



Q23g Rating of experiences in destination – somewhere you could meet and mix with local people

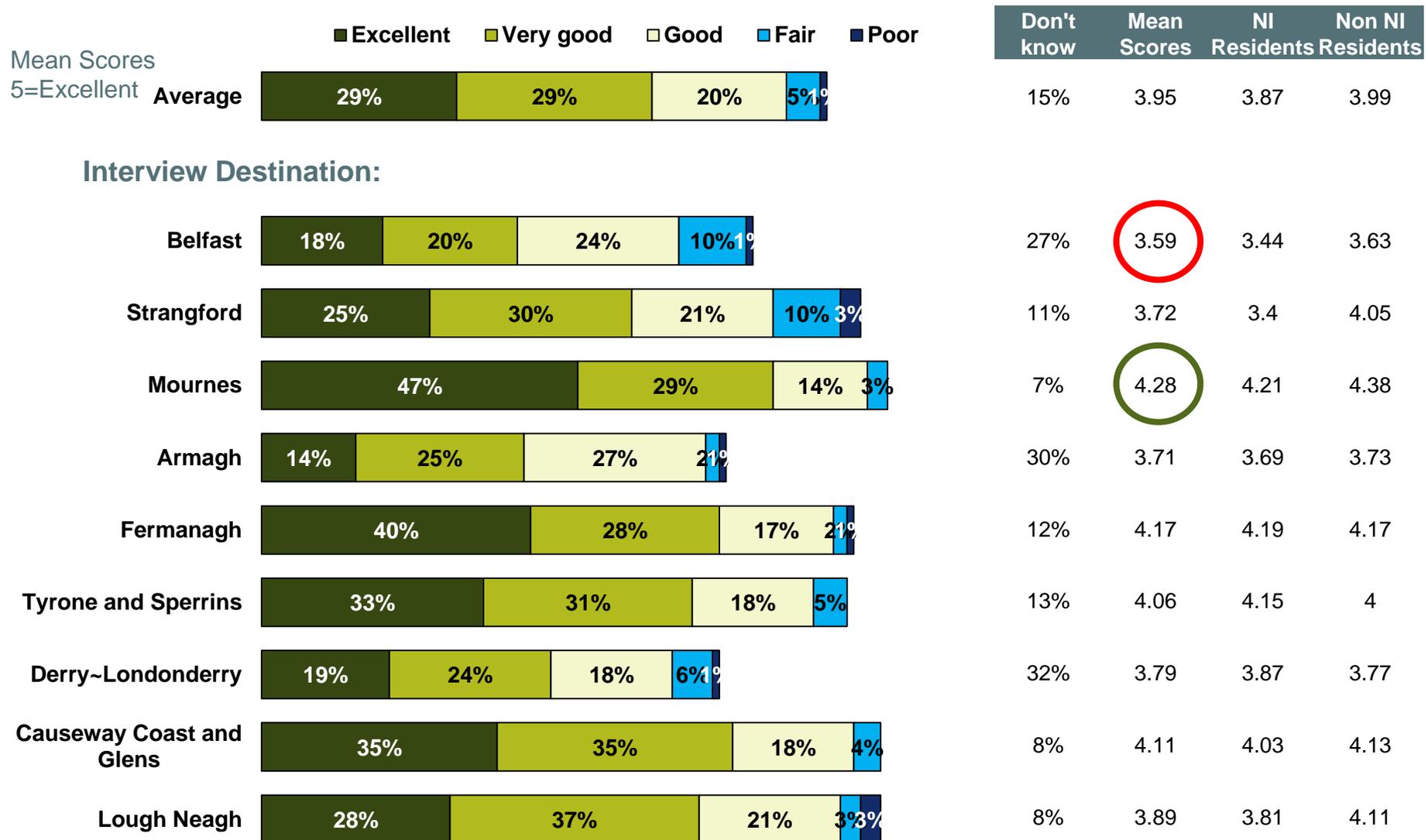
[ Base: All respondents n=1796 ]

Rating - somewhere to find out stories about the people and places: Overall this metric was not very highly rated. Tyrone and Sperrins, with the particular dominance of the Ulster American Folk Park received the highest ratings from visitors in terms of being somewhere to find out stories about the people and places. This was followed by visitors to the Derry-Londonderry area with a mean score, which was encouraging as this was such an important reason for visiting this region.



Q23h Rating of experiences in destination – somewhere that you are able to find out about the stories of the people and place [ Base: All respondents n=1796 ]

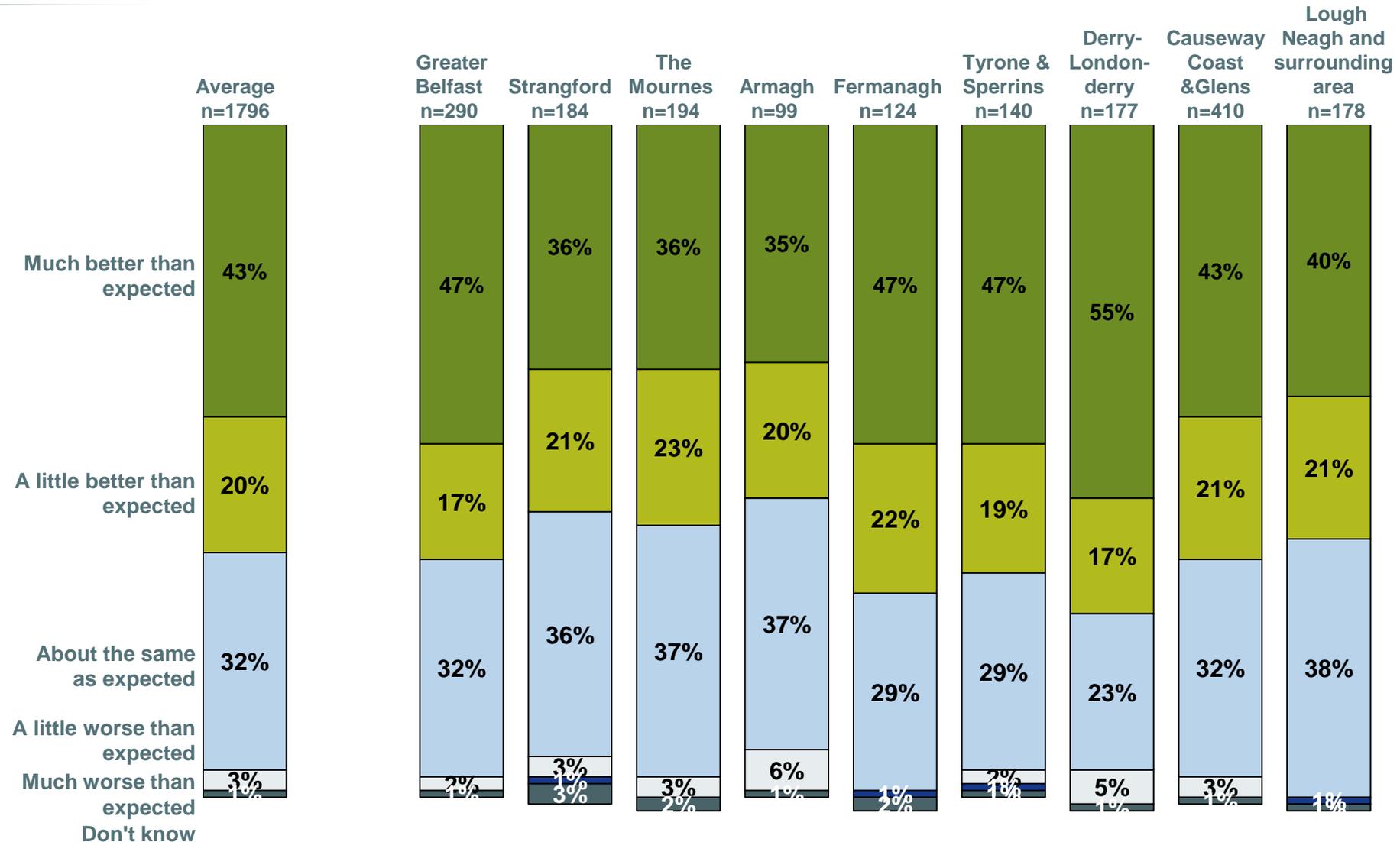
Rating - somewhere to enjoy outdoor activities: In terms of being somewhere visitors can enjoy outdoor activities, a couple of regions stood out including the Mournes, Fermanagh and the Causeway Coast & Glens, especially amongst OOS visitors.



Q23i Rating of experiences in destination – somewhere to enjoy outdoor activities

[ Base: All respondents n=1796 ]

Fulfilment of expectations: Visitors to Derry-Londonderry were most likely to have their expectations exceeded with more than half (55%) of all visitors stating that their visit was much better than expected. For visitors to Fermanagh, Tyrone and Sperrins and the Greater Belfast area, almost half (47%) stated that their trip was much better than expected.



Q.25 Trip to destination: fulfilment of expectations

[ Base: All respondents n=1796 ]

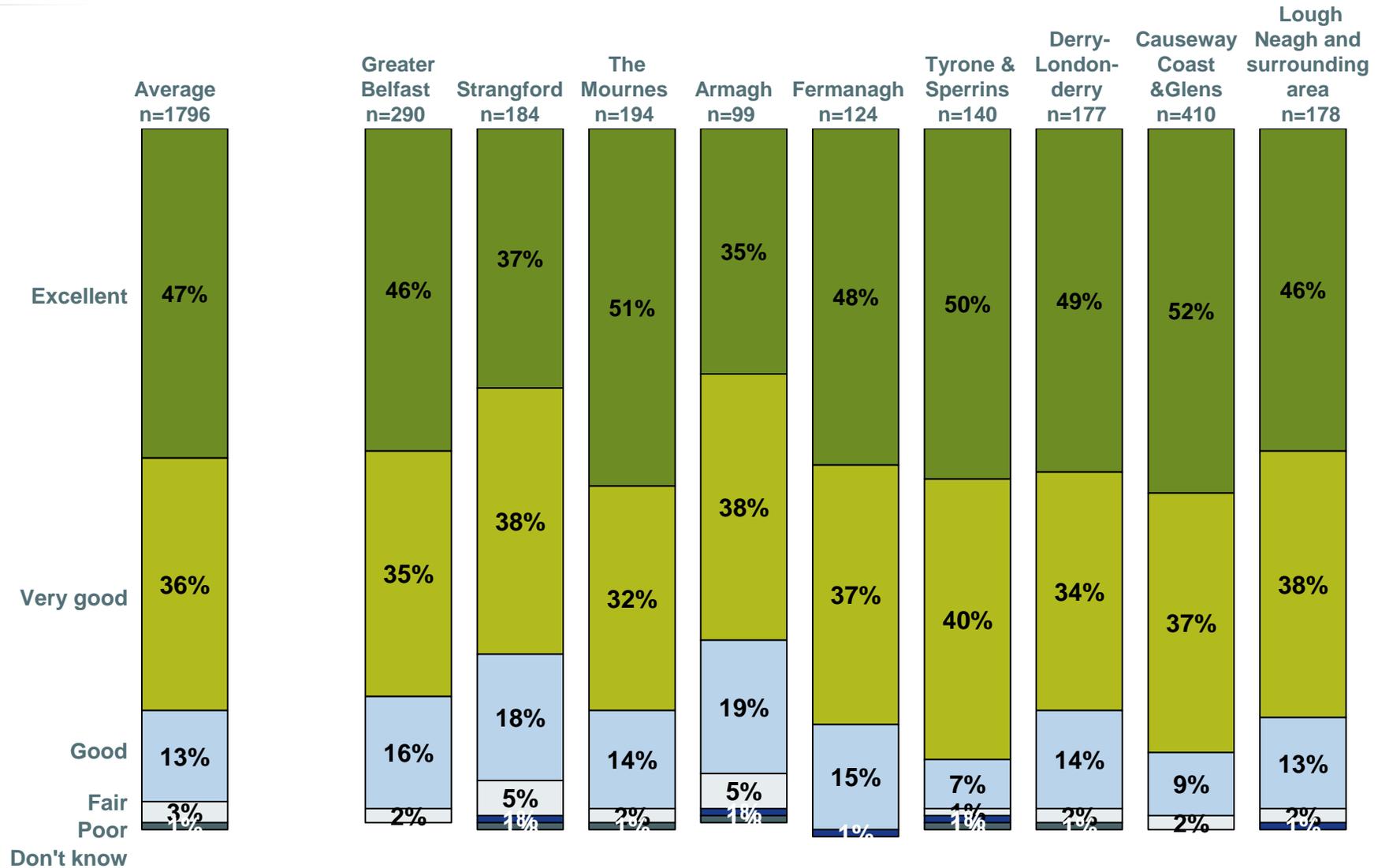
**Fulfilment of Expectations:** With the exception of the Fermanagh region, OOS visitors were more likely to rate their visit as better than they expected. As expected, due to a strong correlation, those who stayed overnight also felt their visit was better than expected (including those visiting Fermanagh).

Interview Destination →	Greater Belfast n=290	Strangford n=184	The Mournes n=194	Armagh N=99	Fermanagh n=124	Tyrone & Sperrins n=140	Derry-London-Derry n=177	The Causeway Coast & Glens n=410	Lough Neagh and surrounding area n=178
<b>All</b>	4.09	3.92	3.94	3.86	4.16	4.12	4.23	4.04	4.01
<b>NI Residents</b>	3.88	3.72	3.76	3.6	4.26	4.02	4.11	3.56	3.98
<b>Out of State Visitors</b>	4.14	4.14	4.16	4.08	4.11	4.18	4.26	4.18	4.08
<b>Stayed overnight in Destination</b>	4.14	4.23	4.01	4.15	4.21	4.17	4.26	4.08	4.08
<b>Day Trip only in Destination</b>	4.04	3.8	3.89	3.75	4.11	4.09	4.21	3.98	3.98

Mean Scores 5=Much Better than Expected

Q.25 Fulfilment of Expectations  
[ Base: All respondents n=1796 ]

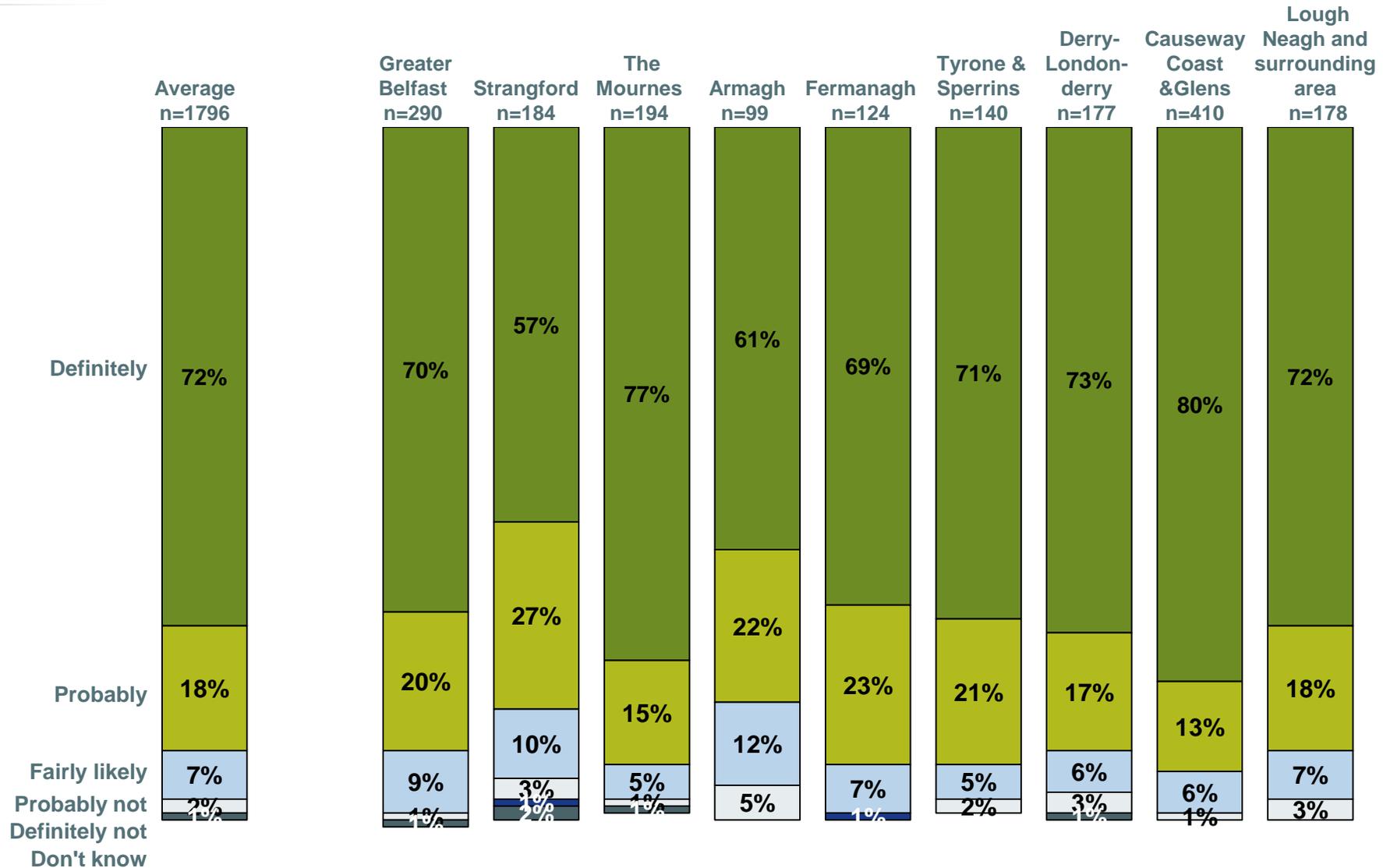
Rating of time spent in destination overall: Visitors to the Causeway Coast and Glens were most likely to rate their trip favourably with just over half (52%) rating the time they spend in the area as excellent, followed by visitors to the Mournes with just over half also rating their time as excellent (51%).



Q.26 Rating of time spent in destination overall

[ Base: All respondents n=1796 ]

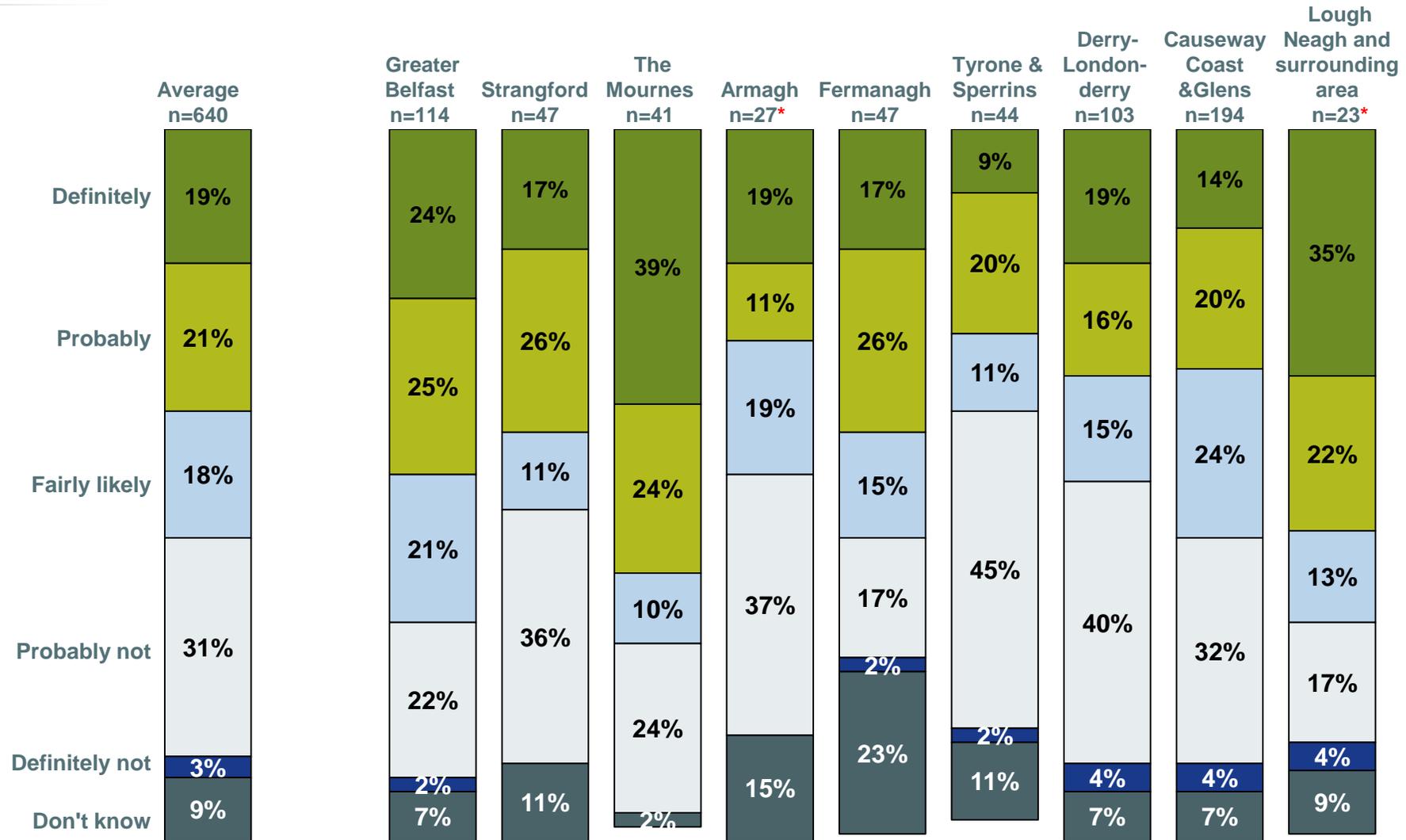
Likelihood of recommending friends and relatives to visit the destination: Visitors to the Causeway Coast and Glens were most likely to say they would 'definitely' recommend the area to family and friends (80%), followed by visitors to the Mournes (77%). Visitors to the Strangford area were least likely to say they would definitely recommend the area (57%).



Q.27 Likelihood of recommending friends and relatives to visit the destination

[ Base: All respondents n=1796 ]

Likelihood of taking another visit to destination during the next 5 years: Those who were visiting from outside the British Isles were much less likely to say they would revisit in the next 5 years due to the greater distance travelled. However, at least 7 in 10 of those who visited the Mournes (73%), Belfast (70%) and Lough Neagh (70%) areas stated they would be at least fairly likely to revisit in the next 2 - 5 years.

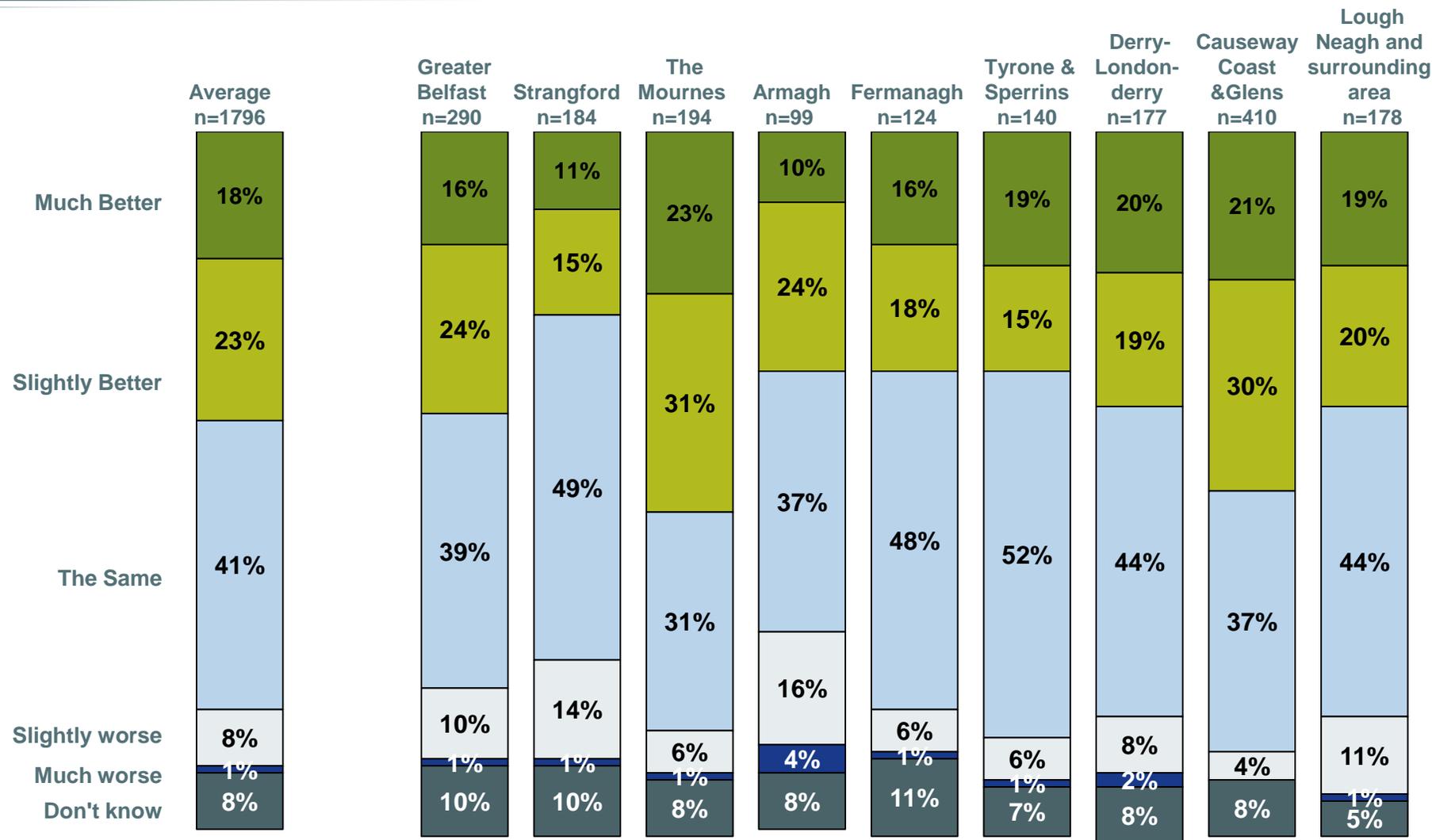


\*CAUTION: Small base

Q.28 Likelihood of taking another visit to destination during the next 5 years

[ Base: All who live outside British Isles n=640 ]

Rating of destination compared to other destinations outside of NI for a holiday or short break: More than half of those who visited the Mournes and Causeway Coast and Glens areas considered these regions as at least slightly better than other destinations outside of NI for a holiday or short break.



Q.29 Rating of destination compared to other destinations outside NI for a holiday or short break

[ Base: All respondents n=1796 ]

Actions following trip: Following the trip, at least 1 in 4 respondents uploaded pictures of their trip to the internet, most notably so amongst visitors to the Causeway Coast and Glens with just over two fifths (41%) of visitors stating that they uploaded their photos online and a further 3 in 10 (30%) stating that they updated their Facebook status about their trip, a higher proportion of visitors than any other area.

Interview Destination	Average n=1796	Greater Belfast n=290	Strangford n=184	The Mourne n=194	Armagh n=99	Fermanagh n=124	Tyrone & Sperrins n=140	Derry- London- Derry n=177	The Causeway Coast & Glens n=140	Lough Neagh and surround- ing area n1781
Uploaded trip photos to the internet i.e. Flickr or Facebook	35%	37%	35%	39%	28%	24%	32%	37%	41%	32%
Updated your Facebook status about your trip	26%	28%	25%	24%	24%	19%	24%	27%	30%	25%
Left reviews on websites such as Tripadvisor	11%	10%	7%	9%	8%	9%	11%	18%	14%	8%
Blogged about your trip	3%	3%	2%	3%	2%	1%	2%	5%	3%	2%
Tweeted about your trip	3%	4%	1%	4%	3%	-	4%	3%	2%	2%
Instant messaging via MSN	2%	2%	2%	2%	2%	2%	1%	2%	1%	1%
Uploaded trip videos to the internet i.e. YouTube	1%	-	2%	1%	-	-	1%	1%	2%	1%
None of these	51%	50%	58%	54%	57%	60%	51%	45%	43%	54%

Q.22 Did any of the following after trip  
[ Base: All Respondents n=1796 ]