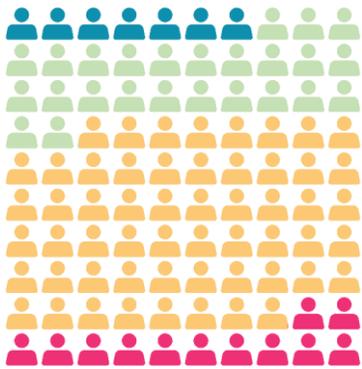


NORTHERN IRELAND

TNI's Visitor Attitude Survey (2018)* reports that the Northern Ireland (NI) leisure market is principally comprised of Out Of State (OOS) visitors, most of whom are on their first ever visit to NI.

Visiting attractions, taking in the scenery and landscapes and uncovering the history/culture are key reasons for visiting NI. The friendliness of the people at each stage of the visitor journey enhanced the overall visitor experience.



- 7% NI residents overnighting
- 25% NI residents on a day trip
- 56% OOS overnight trip
- 12% OOS day trip

68%

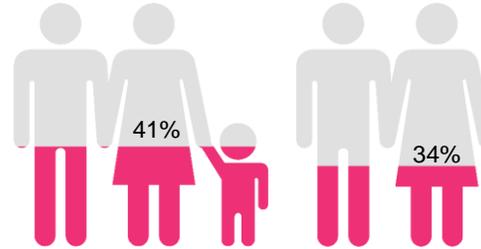
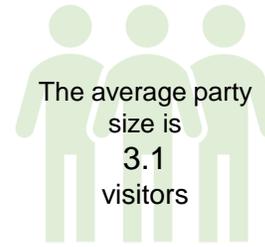
68% of visitors from Out Of State

ORIGIN OF THOSE VISITING NI

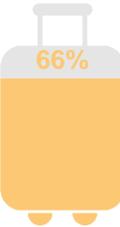
Northern Ireland		32%
Republic of Ireland		12%
Great Britain		21%
USA & Canada		17%
Other Europe		12%
Rest of the World		6%

PARTY TYPE

The majority of leisure visitors (41%) travelled as a family group, whilst 34% of visitors travelled as a couple. 13% of visitors travelled as a group of adults, 6% travelled alone and 6% were on a tour.



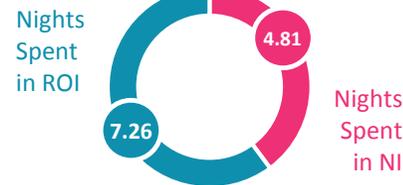
66% of OOS visitors were visiting NI for the first time.



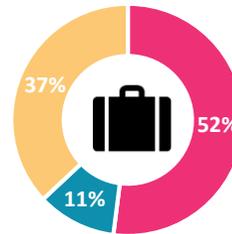
VISITING THE REPUBLIC OF IRELAND

5.4 Nights spent in Northern Ireland

Those visitors overnighting in both NI and ROI spent 40% of their time in NI.



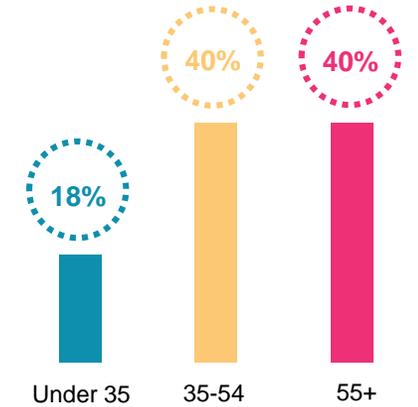
- Overnight Trip to ROI
- Day Trip to ROI
- No Trip to ROI



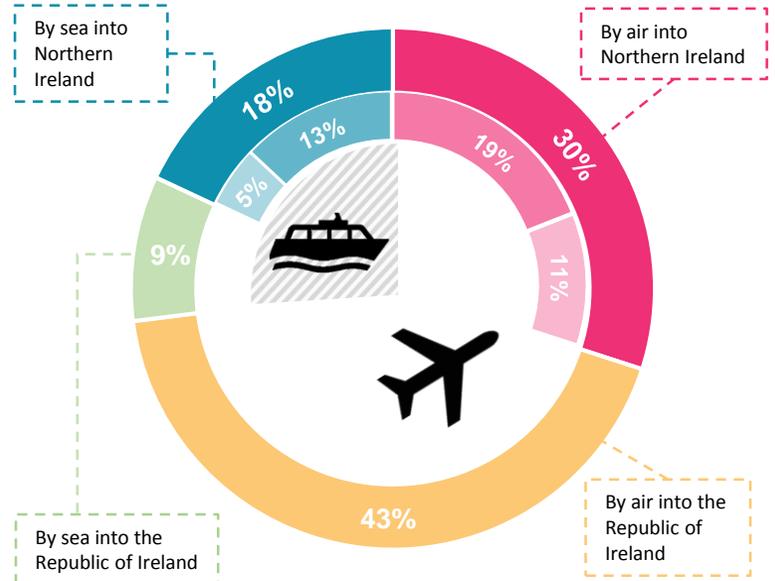
63% of those from outside the island of Ireland who visited NI also visited ROI.

AGE

Northern Ireland attracts a largely mature visitor, with less than 1 in 5 visitors aged under 35.



MEANS OF TRANSPORT INTO THE ISLAND OF IRELAND



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

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

Total Base: n=2950, OOS n=2002

AREAS AND ATTRACTIONS ALSO VISITED IN NI

Attractions that influenced visitors to come to Northern Ireland



54%
Giant's Causeway



38%
Titanic Belfast



48%
Belfast City



22%
Derry-Londonderry

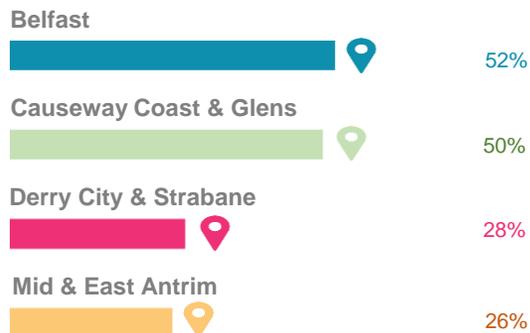


43%
Causeway Coastal Route



16%
Game of Thrones locations

TOP 4 AREAS VISITED



GETTING AROUND IN NI



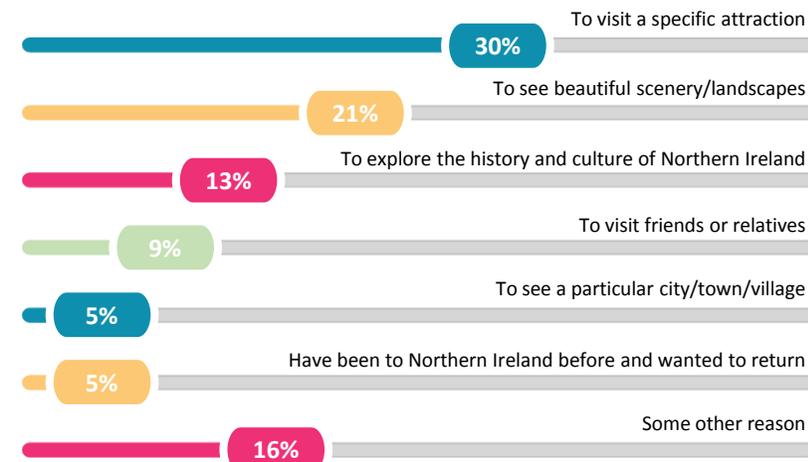
7.41
OVERALL SATISFACTION SCORE

2 in 3 OOS leisure visitors had access to a car. Use of public transport was much greater in urban areas. The friendliness of people, professionalism of drivers and sense of welcome felt as visitors travel around are the highlights. Areas that could be enhanced include roadside viewing bays, pedestrian signposting and availability of car touring routes.

The main reason for visiting Northern Ireland was "to visit a specific attraction" (30%).

The second most important motivator was the scenery and landscapes of NI. Not surprisingly, this varies greatly by area, with scenery being less important to those visiting urban areas, but more important to those visiting rural/coastal areas. Exploring the history & culture of NI was the third most important motivation.

MOST IMPORTANT REASONS FOR VISITING NI



(Average score on scale from 0-10)



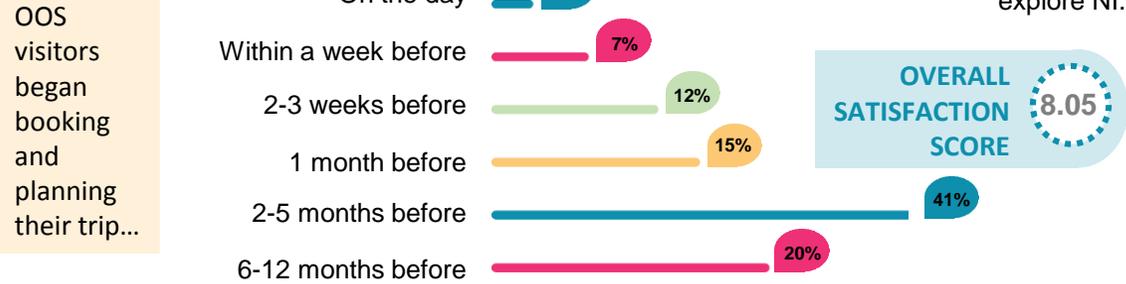
SOURCE: Tourism Northern Ireland: Visitor Attitude Survey 2018, Cognisense Ltd.

Base: n=2950, OOS n=2002

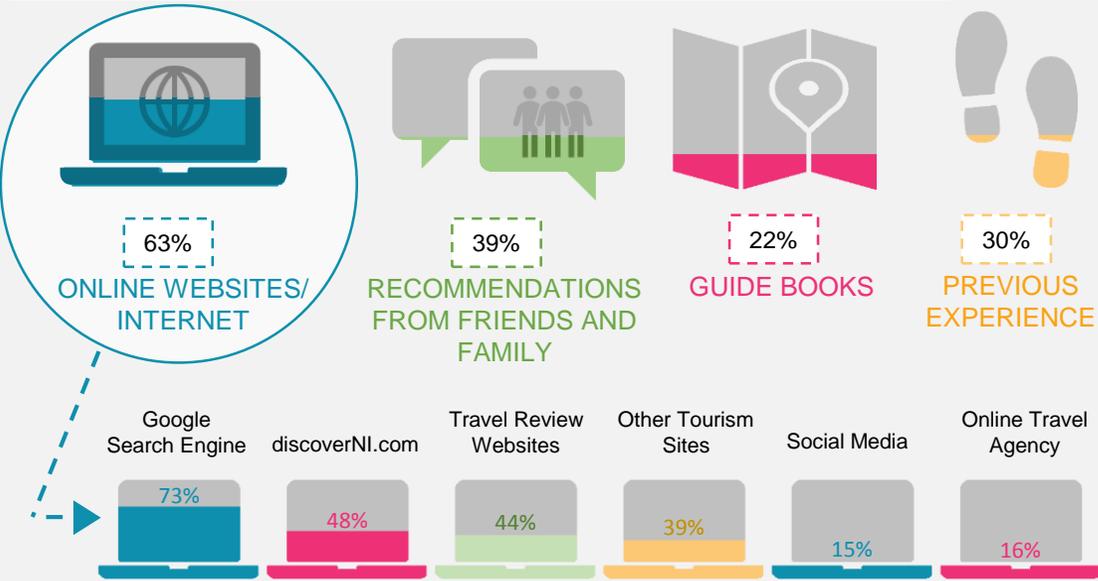
PLANNING & INFORMATION

Most OOS leisure visitors planned their trip 2-5 months ahead and over half found the process exceptionally easy. Online sources dominate the pre-trip planning process, though word of mouth is also influential for 2 in 5 OOS visitors. While in NI the internet remains crucial, and the role of local ambassadors becomes more important when visitors are here. Mobile apps are used by under a fifth of OOS visitors to help them explore NI.

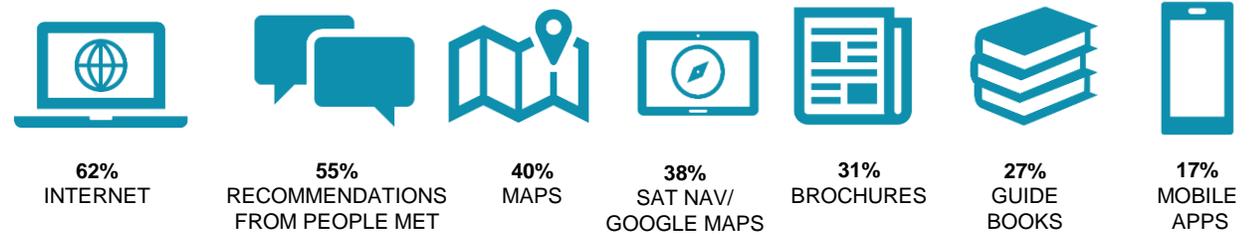
PLANNING TIMESCALE FOR NI



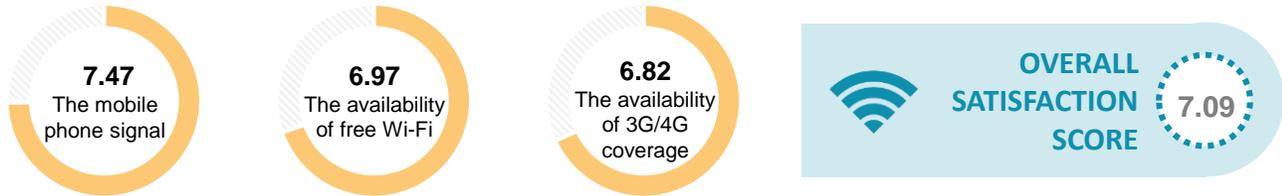
PRE-TRIP PLANNING RESOURCES



INFORMATION SOURCES USED WHILST IN NI



DIGITAL CONNECTIVITY

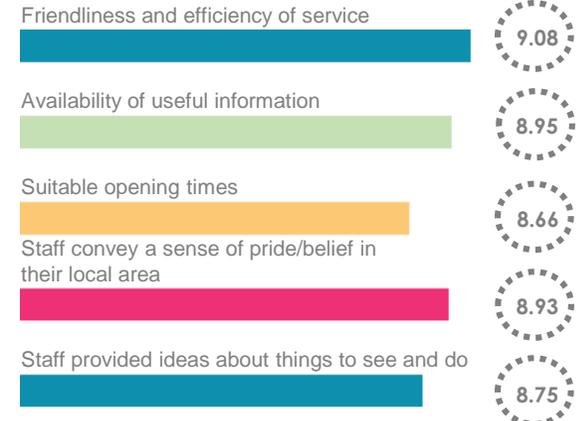


VISITOR INFORMATION CENTRES



38% received information which encouraged them to visit other areas in Northern Ireland they had not planned to visit.

18% received information which encouraged them to stay longer in Northern Ireland.



SOURCE: Tourism Northern Ireland: Visitor Attitude Survey 2018, Cognisense Ltd.
Base: n=2950, OOS n=2002

*A proportion of emails were collected at Visitor Information Centres

ACCOMMODATION



39%
Hotel



20%
Self-Catering



22%
Guest House/
B&B



3%
Camping/
Static Caravan



4%
Motorhome/
Touring
Caravan



16%
Staying with
Family/Friends

2 in 5 overnight leisure visitors stay in hotels. Guest houses/B&Bs and self-catering are used fairly equally by a further 2 in 5. Almost 1 in 3 non-hotel bookings (excluding camping) are made via Airbnb. Again, it is the people and the service in accommodation and eateries that make the strongest positive impact on visitors. However, there could be a better experience of staff passing on information on what to do and see to visitors.

31% of all guest houses, B&Bs and self-catering accommodation was booked through Airbnb.



77% of visitors with children described the accommodation available as "family friendly for children of all ages".

PLACES TO EAT

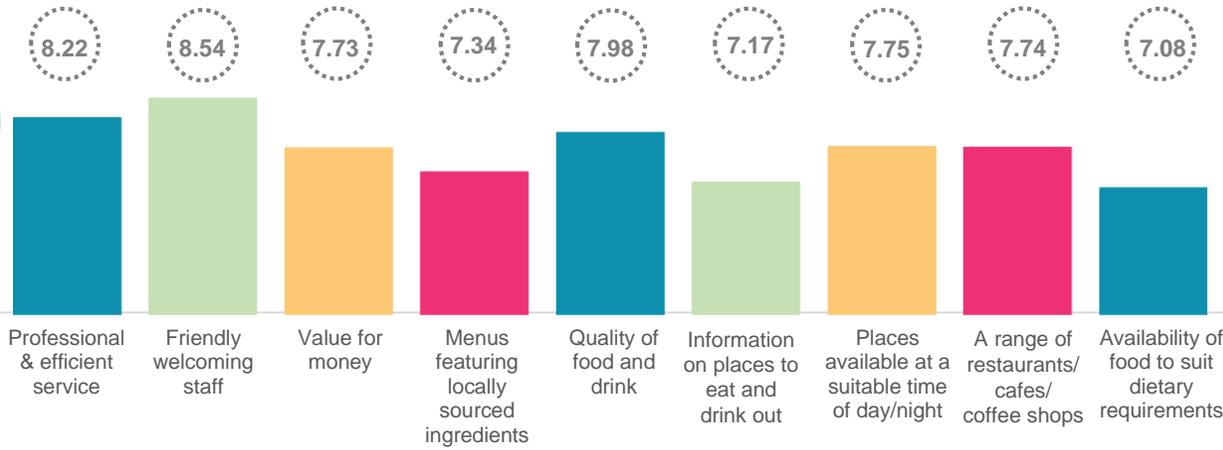


OVERALL SATISFACTION SCORE

7.81



Most popular types of places to eat



Engagement with staff is a highlight of the eating out experience. Assisting visitors to find out where to eat and providing menus which suit dietary requirements and feature local ingredients are areas that might be enhanced.

ACCOMMODATION RATINGS



OVERALL SATISFACTION SCORE

94% of visitors said that the quality of the accommodation they stayed in exceeded or met their expectations. Expectations were greatly exceeded for 14%.

89% of visitors agreed that they were able to stay in their preferred type of accommodation. Only 2% were not.

Satisfaction with accommodation is the second highest scoring element of the visitor experience right across NI, achieving consistently close to or in line with the experience of the Visitor Information Centres. In both cases it is the interaction with people that helps to support these higher scores.



*Visitor Information Centre

SOURCE: Tourism Northern Ireland: Visitor Attitude Survey 2018, Cognisense Ltd.
Base: n=2950, OOS n=2002

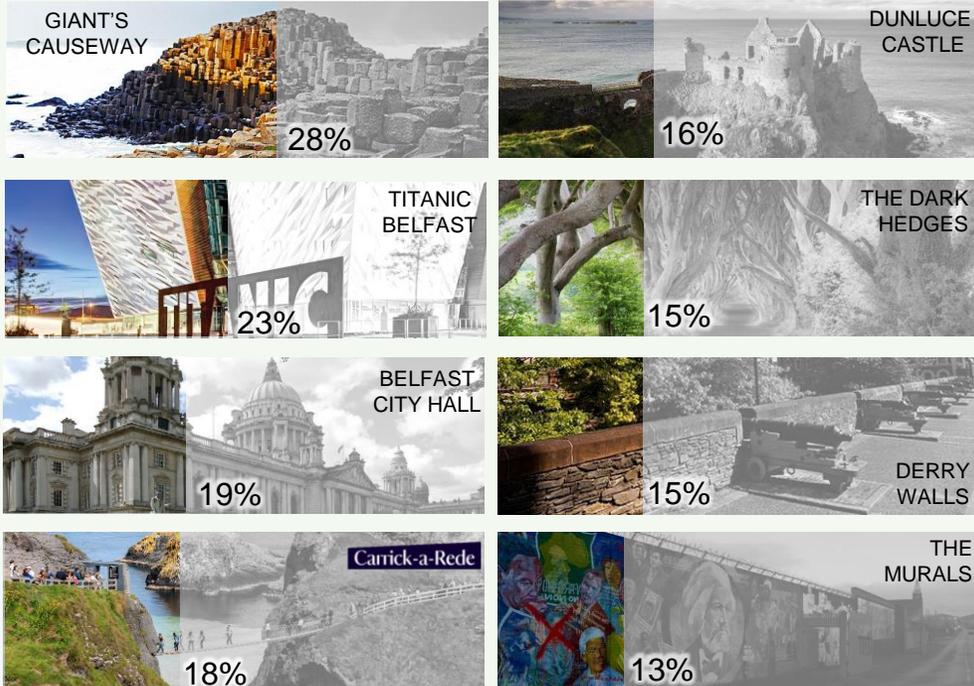
ATTRACTIONS & ACTIVITIES

As might be expected, NI's stand-out attractions are the Giant's Causeway and Titanic Belfast. Yet again, the interaction with people at the attractions and the service they provide are the highlights of the visitor experience. Providing information in other languages requires attention.

87% of visitors with children said that the attractions in NI are "family friendly for children of all ages."



ATTRACTIONS VISITED IN NI



RATINGS OF ATTRACTIONS IN NI

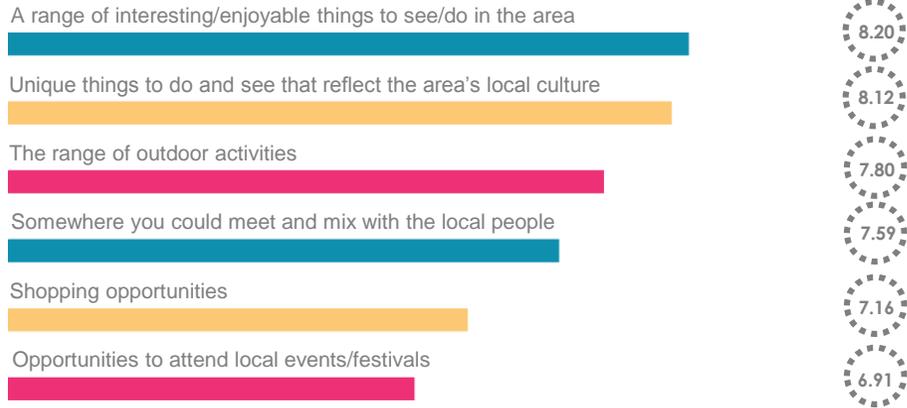


8.31

OVERALL SATISFACTION SCORE



RATINGS OF THINGS TO SEE & DO IN NI



7.63

OVERALL SATISFACTION SCORE



7.93

Satisfaction with cleanliness in the area

7.21

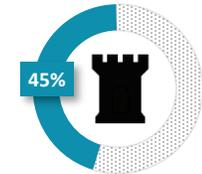
Cleanliness & availability of public toilets

8.43

Satisfaction with safety in the area

THINGS SEEN AND DONE

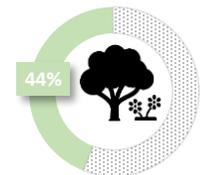
Visited a castle /other historic monument



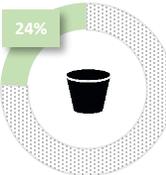
Went shopping



Visited a forest, park or garden



Visited a beach



Visited a pub



Visited a visitor/interpretation centre



Visited a museum or art gallery



Took a guided tour



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

Total Base: n=2950, OOS n=2002

BEST EXPERIENCES IN NI

The people were all incredibly friendly and helpful at the Giant's Causeway Visitor Centre. They offered us great help in finding different spots of potential interest in the area, as well as offered great suggestions for two travellers who had no itinerary. Everywhere offered beautiful sweeping views, and scenery which was exactly what we were looking for. We were travelling on a whim, so we didn't know what we were looking for, but Northern Ireland blew us away and exceeded our expectations!

A wonderful holiday. We should have visited a lot sooner. Great friendly people, scenery which was exactly what we were looking for. We were travelling on a whim, so we didn't know what we were looking for, but Northern Ireland blew us away and exceeded our expectations!

The tour of the Guildhall was fantastic...[Our guide's] ability to bring history to life...was an experience I will not forget...

Glenariff was astonishing. Most interesting thing for us is driving to see the dramatic landscapes in your country and walking through the mountains. Lovely scenery. Beautiful land.

We just enjoyed everything we saw and cannot wait to return. The air is clean and scenery beautiful. The culture, museums, cafes, etc.

The fabulous weather, beautiful beaches, spectacular scenery and sunsets. The sense of peace and calm that we felt driving in this wonderful part of Ireland.

...meeting and speaking with a guide at the Museum of Free Derry was an unforgettable experience. [Their] knowledge and willingness to share personal experiences are memorable. It was an amazing and unexpected opportunity to help me better understand the political history of the area – Thank You!!

Walking through the Silent Valley area was beautiful. We also stopped in a town by the sea and experienced the beach and cafes. The journey from Belfast by road was via the coastal route and it was wonderful...

Fantastic trip. Continuous surprise at how very lovely and interesting NI is, how friendly and helpful people were - great roads, wide pavements. Have been singing NI's praises to everyone...And there is so much to see. What a revelation!

I loved Belfast. I took a donation based walking tour and that was one of the best things I did. I learned so much history from someone local. I also loved the Titanic Museum. I spent 4 hours there. It was so well done.

Really enjoyed The Gobbins, the staff and guide were very friendly. Met some lovely local people in the local pub in Carrickfergus.

The house and garden at Mount Stewart were really quite amazing. I never suspected that there would be so much history and beauty there and the interest and explanations given by the staff in the house and around the grounds was really second to none...

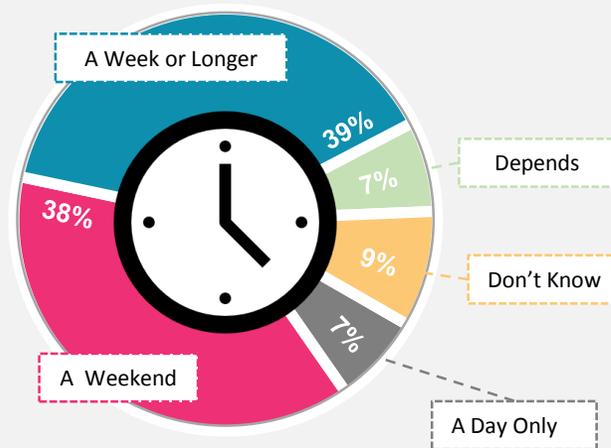
We enjoyed the local scenery and watching for wildlife. There were plenty of walks and cycle rides to complete on quiet roads. It was the beauty and feel of spaciousness [of Fermanagh & Omagh] that we took home with us.

Meeting the local people...to hear how passionate they are about your beautiful country. We were told about their favourite places and probably would not have found them otherwise.

Talking to local people – they were friendly, informative and generous with their time and knowledge.

IS THERE ENOUGH TO DO IN NORTHERN IRELAND?

Leisure visitors think there is enough to do for...



There was enough to do in all weather conditions



There was enough to do in the evenings



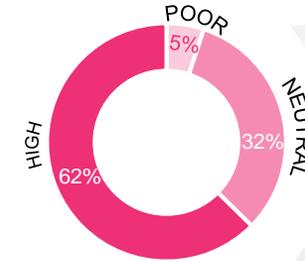
There was enough to do on Sundays



The people and the scenery of NI are the highlights of the visitor experience, with NI's attractions enhancing the experience for many. The breadth of what there is to see and do generally surprises OOS visitors, but visitors would benefit from a more proactive stance from the hospitality sector to signpost better the gems that should not be overlooked.

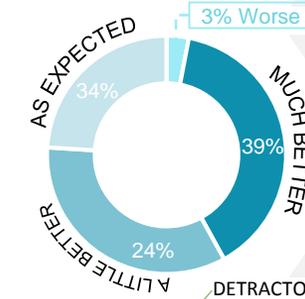
DESTINATION EXPERIENCE

OVERALL EXPERIENCE



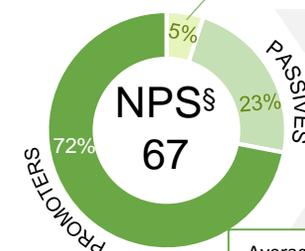
62% of visitors would rate their experience in NI as "Excellent". 32% are passive about their experience and only 5% would regard their experience as poor.

EXCEEDING EXPECTATIONS



39% of visitors said the trip to NI was "much better than expected". 58% said it was around the same or slightly better and only 3% said it was "worse than expected".

RECOMMEND NI TO FAMILY AND FRIENDS



72% of visitors would definitely recommend NI. 23% are fairly likely to recommend NI and only 5% would not recommend others visit NI.

Average NPS for all NI council areas was 58

Almost two thirds of visitors had an experience that was beyond their expectations. 9 in 10 OOS visitors would be likely to recommend NI to others, with an NPS* of 67 for NI as a whole. Enhancing the Sunday tourism offer across NI and the evening tourism offer outside the two main urban areas requires attention. Further development around some key aspects of transport and digital connectivity would also enhance the visitor experience.

[§](NPS) = Net Promoter Score[®]

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

Base: n=2950, OOS n=2002

NORTHERN IRELAND

		MEASURE	NORTHERN IRELAND
PLANNING & BOOKING	8.05	The availability of useful information to help you to plan your trip	8.14
		The availability/ease of finding information about the different regions within Northern Ireland	8.11
		Ease of finding information on the area	8.27
		Ease of finding information on things to see and do in Northern Ireland	8.43
		Ease of finding suitable accommodation in Northern Ireland	8.14
		Ease of finding suitable accommodation in the area	7.96
		Ease of booking activities and attractions online	7.75
		Ease of booking accommodation online	8.49
		Ease of booking transport within Northern Ireland	7.19
ARRIVAL	7.74	A feeling of being welcomed when you arrived in Northern Ireland	8.11
		Clear signs to let you know when you have arrived in Northern Ireland	7.48
		The availability of tourist information at the air or sea port you arrived at	7.45
GETTING AROUND	7.41	Signs that help you find interesting/key tourist locations	7.69
		Quality of signposting for roads/directions	7.58
		Availability of trains	7.88
		Value for money of trains	7.52
		Availability of buses	7.93
		Value for money of buses	7.75
		Availability of taxis	8.02
		Value for money of taxis	7.86
		Friendliness and professionalism of taxi drivers	8.68
		Friendliness and professionalism of bus drivers	8.49
		Car touring routes which point out places along the way	7.09
		A feeling of being welcomed when you arrived in the area	8.08
		Places by the road to stop while driving and view the landscape	6.74
		Availability and cost of parking	7.14
		Signposting for exploring the area by foot	7.08
Quality of the roads	7.15		
VISITOR INFORMATION CENTRES	8.87	Friendliness and efficiency of service	9.08
		Availability of useful information	8.95
		Suitable opening times	8.66
		Staff convey a sense of pride/belief in their local area	8.93
		Staff provided ideas about things to see and do	8.75

EXPERIENCE OF NORTHERN IRELAND

	MEASURE	NI
DIGITAL CONNECTIVITY	7.09 The mobile phone signal	7.47
	The availability of free Wi-Fi	6.97
	The availability of 3G/4G coverage	6.82
EATING OUT	8.35 Professional, efficient service	8.22
	Friendly, welcoming staff	8.54
	Value for money of eateries	7.73
	Menus featuring locally sourced ingredients	7.34
	Quality of food and drink	7.98
	Information on places to eat and drink out	7.17
	Places to eat available at the times of day and night that suit you	7.75
	Range of restaurants/cafes/coffee shops	7.74
ACCOMMODATION	8.35 Availability of food to suit dietary requirements – vegetarian/vegan/gluten free	7.08
	Quality of accommodation	8.46
	Value for money of accommodation	8.22
	Professional and efficient customer service	8.57
	Friendly and welcoming staff/host	8.87
	Accommodation that is a key part of the holiday experience itself	8.12
	Staff knowledgeable about interesting things to see and do in local area	8.07
ATTRACTIONS	8.31 Availability of free Wi-Fi	8.12
	Value for money of attractions (historic sites, museums, visitor centres etc.)	7.95
	Information at visitor attractions in your own language	5.80
	A range of interesting/enjoyable visitor attractions	8.34
	Quality of interpretation and storytelling at museums/visitor centres in area	8.27
THINGS TO SEE AND DO	8.31 Professional and efficient staff at attractions	8.56
	Friendly staff at the attractions	8.80
	8.12 Unique things to do and see that reflect the area's local culture	8.12
	The range of outdoor activities	7.80
	Opportunities to attend local events/festivals	6.91
	7.63 Range of interesting/enjoyable things to see/do in the area	8.20
	Shopping opportunities	7.16
Somewhere you could meet and mix with the local people	7.59	

	MEASURE	NI
NI EXPERIENCE	8.15 Cities, towns & villages	8.15
	7.83 Range of activities	7.83
	8.90 Beautiful scenery/landscapes	8.90
	8.47 Friendly local people	8.47
	8.61 Rich history and culture of NI	8.61
	6.05 Ability to trace ancestral links	6.05
	5.58 Availability of special offers e.g. Groupon deal/good deal on accommodation	5.58
	7.14 Screen tourism	7.14
	8.77 How would you rate your overall experience during this visit, based on the time you spent in area	8.77
	ENOUGH TO DO	7.50 There was enough to do in all weather conditions
7.16 There was enough to do in the evenings		7.16
6.90 There was enough to do on Sundays		6.90
CLEANLINESS /SAFETY	7.21 Cleanliness and availability of public toilets	7.21
	7.93 Cleanliness of area/litter free	7.93
	8.41 Cleanliness of the beaches	8.41
	8.43 Sense of safety and security while walking around the area	8.43

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

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

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

INTERPRETING TNI'S 2018 VISITOR ATTITUDE SURVEY



SURVEY BACKGROUND & RATING SCALE

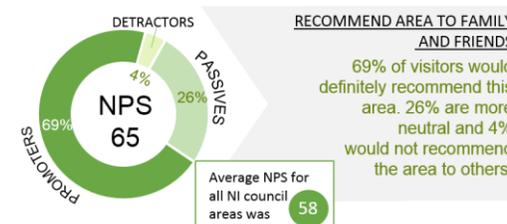
- Tourism Northern Ireland's (TNI) 2018 Visitor Attitude Survey (VAS) was carried out by Cognisense, an experienced market research company. The research was conducted in compliance with the International Standard ISO 20252:2012
- The VAS collected information on a wide range of areas to help TNI better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



$$\text{NPS} = \% \text{ (happy face)} - \% \text{ (sad face)}$$

- 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.