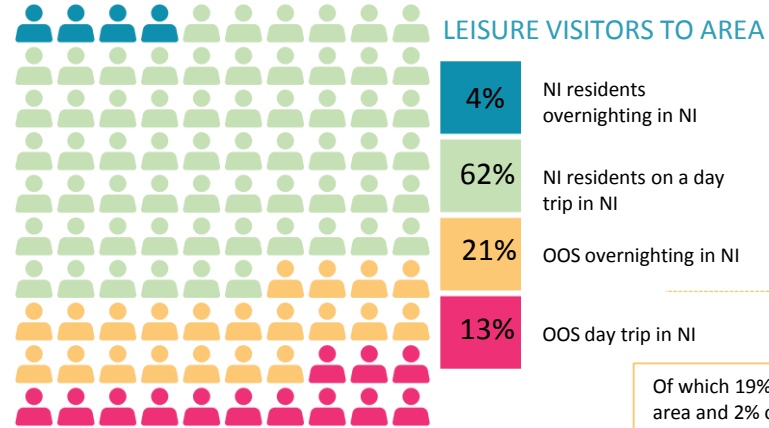


ARMAGH CITY, BANBRIDGE & CRAIGAVON

TNI's Visitor Attitude Survey (2018)* reports a higher proportion of local leisure visitors to Armagh City, Banbridge & Craigavon, particularly Northern Ireland (NI) day trippers, compared with most other areas. As such, the area welcomes more families with children and frequent visitors.

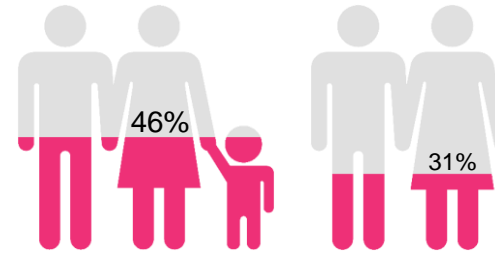
Visiting a specific attraction was a key motivator for visiting the area (for many this was Oxford Island National Nature Reserve and/or Kinnego Marina).



PARTY TYPE

46% travelled as a family, whilst **31%** of visitors travelled as a couple. **11%** of visitors travelled alone, **11%** travelled as a group of adults and **2%** were on a tour.

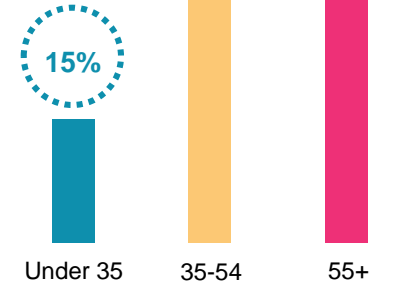
The average party size is **3.06** visitors



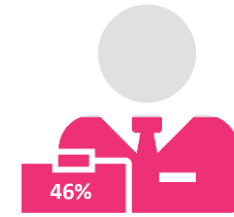
As the tourism landscape in this area is more oriented towards local day trippers, there is less motivation in visiting to admire the scenery and experience the culture, but more interest in things to see and do. Participation in cycling, adventure and outdoor pursuits was higher relative to many other areas in NI.

AGE

With a more family oriented visitor profile, Armagh City, Banbridge & Craigavon attracts a slightly larger 35-54 age group than the NI average



VISITOR INFORMATION CENTRES



46%[†] had visited a Visitor Information Centre on their trip to Northern Ireland. **35%** had visited a Visitor Information Centre in the area.

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

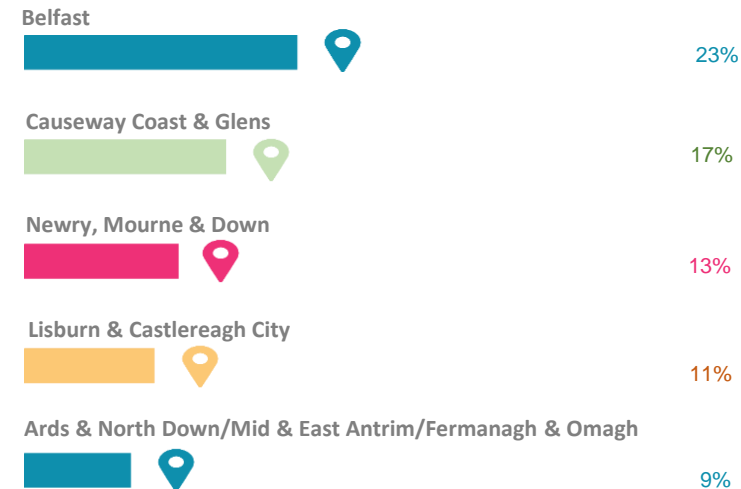
23% received information which encouraged them to stay longer in the area.

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

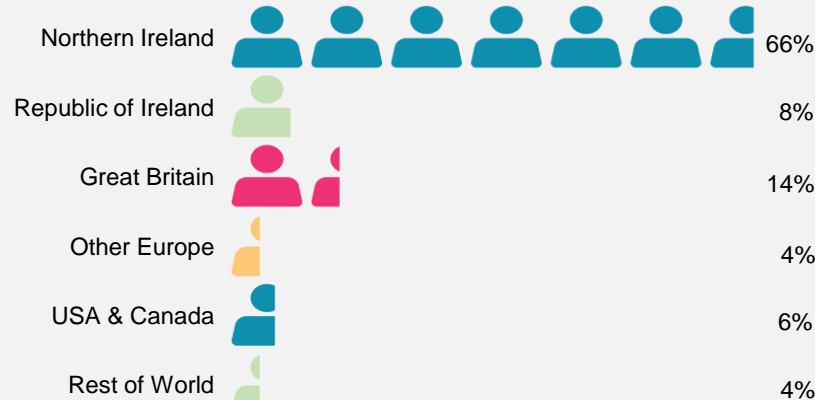
*SOURCE: Tourism Northern Ireland: Visitor Attitude Survey 2018, Cognisense Ltd.

Base: n=168

TOP 5 OTHER AREAS VISITED



ORIGIN OF THOSE VISITING DESTINATION



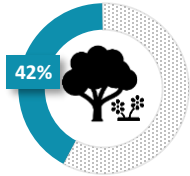
34%

34% of visitors from out of state.

Of which 19% overnighted in the area and 2% overnighted elsewhere in NI

THINGS SEEN AND DONE

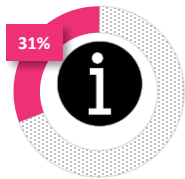
Visited a forest, park or garden



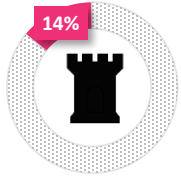
Visited a museum/ art gallery



Visited a visitor /interpretation centre



Visited a castle, house or historic monument



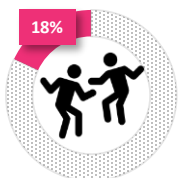
Visited a pub



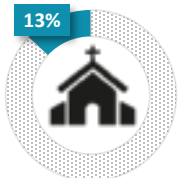
Went shopping



Attended an event or festival



Visited a church or cathedral



= Significantly lower than the average for all areas

ATTRACTIONS VISITED IN THE AREA



58%
Oxford Island National Nature Reserve/
Lough Neagh Discovery Centre



42%
Kinnego Marina



11%
Lurgan Park



11%
St Patrick's Cathedral



11%
Armagh Observatory & Planetarium

= Significantly higher than the average for all areas

RATINGS OF ATTRACTIONS IN THE AREA

Friendly staff at the attractions



Professional and efficient staff at attractions



Value for money of attractions (historic sites, museums, visitor centres etc.)



Quality of interpretation and storytelling at museums/visitor centres in area



A range of interesting/enjoyable visitor attractions



OVERALL SATISFACTION SCORE



RATINGS OF THINGS TO SEE & DO IN THE AREA

The range of outdoor activities



Unique things to do and see that reflect the area's local culture



Range of interesting/enjoyable things to see/do in the area



Somewhere you could meet and mix with the local people



Shopping opportunities



Opportunities to attend local events/festivals



OVERALL SATISFACTION SCORE



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

Base: n=168

PLACES TO EAT

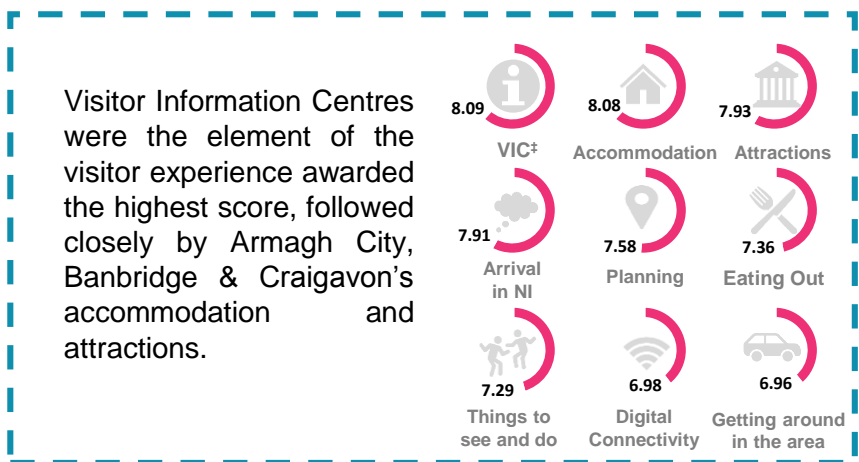
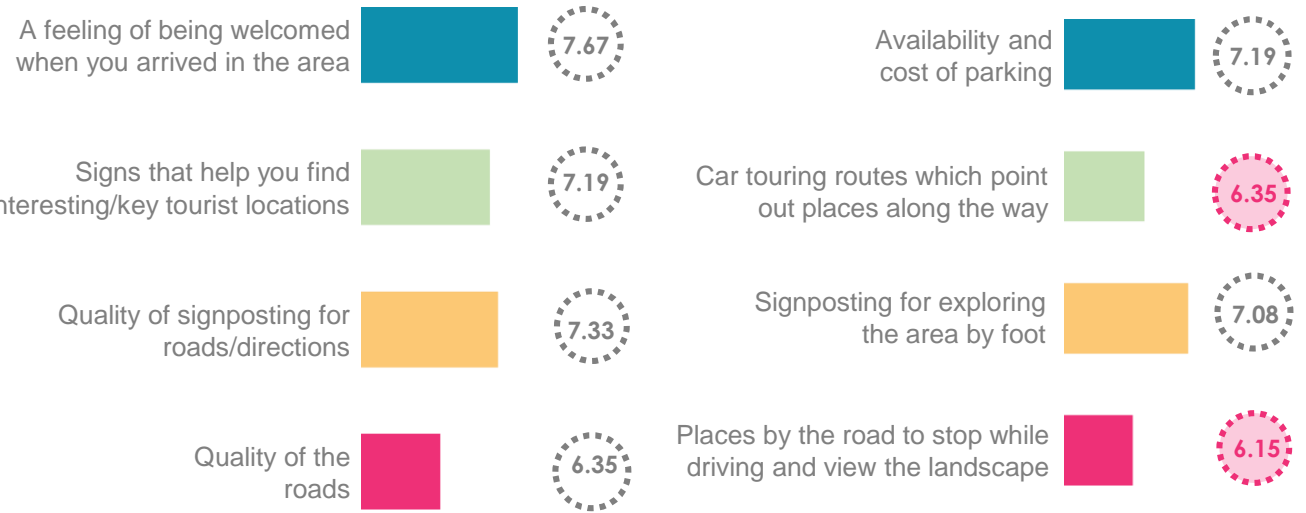


Engagement with staff is a highlight of the eating out experience. The range of eating out establishments and quality of food and drink scored below the NI average. Improvements in these areas, as well as providing menus which suit dietary requirements and feature local ingredients could enhance the visitor experience.

DIGITAL CONNECTIVITY



GETTING AROUND THE AREA



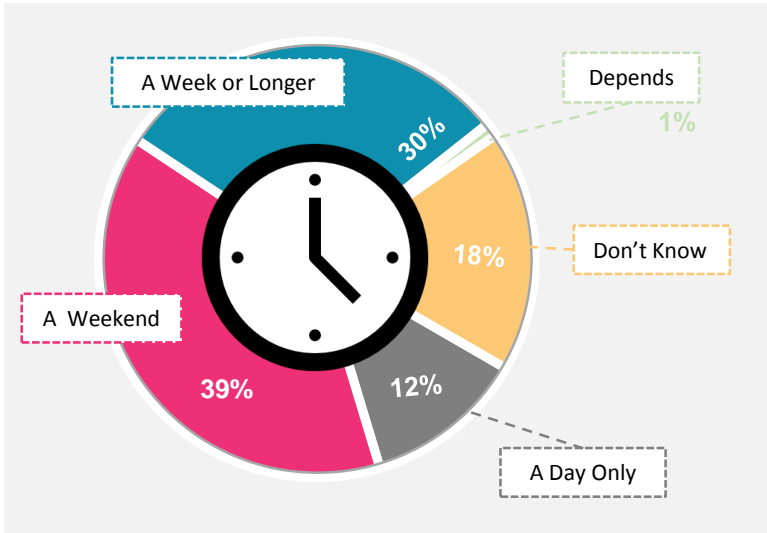
*Visitor Information Centre

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

Base: n=168

IS THERE ENOUGH TO DO IN THE AREA

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



There was enough to do in all weather conditions

6.96

There was enough to do in the evenings

6.78

There was enough to do on Sundays

6.48

7.82

Satisfaction with cleanliness in the area

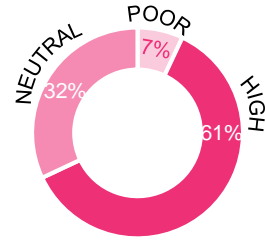
7.14

Satisfaction with cleanliness and availability of public toilets

8.51

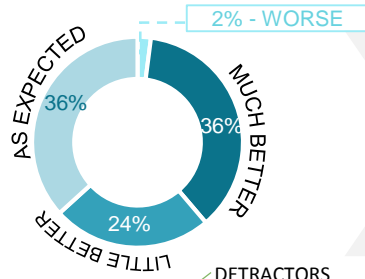
Satisfaction with safety in the area

VISITOR EXPERIENCE



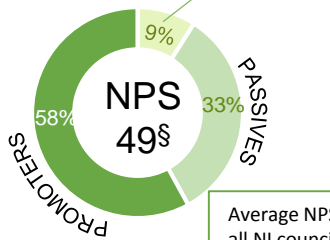
OVERALL EXPERIENCE

61% of leisure visitors would rate their experience in this area as "Excellent". 32% are passive about their experience and only 7% would regard their experience as poor.



EXCEEDING EXPECTATIONS

36% of visitors said the trip to the area was "much better than expected". 60% said it was around the same or slightly better and only 2% said it was "worse than expected".



RECOMMEND AREA TO FAMILY AND FRIENDS

58% of visitors would definitely recommend this area. 33% are fairly likely to recommend the area and 9% would not recommend.

Average NPS for all NI council areas was 58

For three fifths of leisure visitors their experience in Armagh City, Banbridge & Craigavon exceeded expectations. Relative to other areas of NI, visitors were less positive about the tourism offer in terms of the range of interesting things to see and do in the area.

Leisure visitors to Armagh City, Banbridge & Craigavon were also less satisfied with the range of eating out opportunities and the quality of the food and drink experienced.

Improving aspects of getting around (e.g. car touring routes and roadside viewing bays), and broadening the tourism offering to ensure there is enough to do (especially in all weather conditions) would enhance the visitor experience.

§(NPS) = Net Promoter Score®

BEST EXPERIENCES IN THE AREA

Overall surprise at the friendliness of every person we met.

The staff at the B&B were extremely welcoming and helpful. We felt very blessed to have been staying at such a family friendly and helpful place. We took the class on Celtic Spirituality at the Navan Centre. We had a wonderful guide through this experience. We felt that we gained a good insight into the early Celtic people and their daily lives. Through [their] readings and prayers, [they] helped us to feel a connection to the Celtic beliefs and their relationship (and ours) with God. After class [they] took us to some significant sites in and around Armagh. Overall we found that the people that we met on our trip were all very welcoming and helpful. It was for us, a wonderful experience.

Overall there is plenty to do on day trips, with good amount of eating places and scenery that puts other places around the world to shame.

Armagh Planetarium was great...a really magical place. Staff couldn't have been nicer or more helpful. This place is a jewel for encouraging kids to learn about space!

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

Base: n=168

ARMAGH CITY, BANBRIDGE & CRAIGAVON

	MEASURE	ARMAGH CITY, BANBRIDGE & CRAIGAVON	NORTHERN IRELAND	
PLANNING & BOOKING	7.58	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	7.95	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	7.91	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 IN THE AREA	6.96	Signs that help you find interesting/key tourist locations	7.19	7.69
		Quality of signposting for roads/directions	7.33	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	6.35	7.09
		A feeling of being welcomed when you arrived in the area	7.67	8.08
		Places by the road to stop while driving and view the landscape	6.15	6.74
		Availability and cost of parking	7.19	7.14
		Signposting for exploring the area by foot	7.08	7.08
Quality of the roads	6.35	7.15		
VISITOR INFORMATION	8.09	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

SIGNIFICANTLY HIGHER THAN THE AVERAGE FOR NI **SIGNIFICANTLY LOWER THAN THE AVERAGE FOR NI**

---- = INSUFFICIENT BASE

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

Base: n=168



EXPERIENCE OF ARMAGH CITY, BANBRIDGE & CRAIGAVON

---- = INSUFFICIENT BASE

	MEASURE	ARMAGH CITY, BANBRIDGE & CRAIGAVON	NI	
DIGITAL CONNECTIVITY	6.98	The mobile phone signal	7.40	7.47
		The availability of free Wi-Fi	6.63	6.97
		The availability of 3G/4G coverage	6.92	6.82
EATING OUT	7.36	Professional, efficient service	7.88	8.22
		Friendly, welcoming staff	8.23	8.54
		Value for money of eateries	7.76	7.73
		Menus featuring locally sourced ingredients	6.80	7.34
		Quality of food and drink	7.27	7.98
		Information on places to eat and drink out	6.90	7.17
		Places to eat available at the times of day and night that suit you	7.33	7.75
		Range of restaurants/cafes/coffee shops	7.11	7.74
		Availability of food to suit dietary requirements – vegetarian/vegan/gluten free	6.68	7.08
ACCOMMODATION	8.08	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
		Availability of free Wi-Fi	---	8.12
ATTRACTIONS	7.93	Value for money of attractions (historic sites, museums, visitor centres etc.)	7.78	7.95
		Information at visitor attractions in your own language	---	5.80
		A range of interesting/enjoyable visitor attractions	7.58	8.34
		Quality of interpretation and storytelling at museums/visitor centres in area	7.63	8.27
		Professional and efficient staff at attractions	8.19	8.56
THINGS TO SEE AND DO	7.29	Friendly staff at the attractions	8.44	8.80
		Unique things to do and see that reflect the area's local culture	7.46	8.12
		The range of outdoor activities	7.48	7.80
		Opportunities to attend local events/festivals	6.95	6.91
		Range of interesting/enjoyable things to see/do in the area	7.41	8.20
		Shopping opportunities	7.02	7.16
	Somewhere you could meet and mix with the local people	7.39	7.59	

	MEASURE	ARMAGH CITY, BANBRIDGE & CRAIGAVON	NI
EXPERIENCE	Cities, towns & villages	---	8.15
	Activities	---	7.83
	Beautiful scenery/landscapes	---	8.90
	Friendly local people	---	8.47
	Rich history and culture of area/NI	---	8.61
	Ability to trace ancestral links	---	6.05
	Availability of special offers e.g. Groupon deal/good deal on accommodation	---	5.58
	Screen tourism	---	7.14
	Overall experience during this visit, based on the time you spent in area	8.71	8.77
	ENOUGH TO DO	There was enough to do in all weather conditions	6.96
There was enough to do in the evenings		6.78	7.16
There was enough to do on Sundays		6.48	6.90
CLEANLINESS/ SAFETY	Cleanliness and availability of public toilets	7.14	7.21
	Cleanliness of area/litter free	7.82	7.93
	Cleanliness of the beaches	----	8.41
	Sense of safety and security while walking around the area	8.51	8.43

SIGNIFICANTLY HIGHER THAN THE AVERAGE FOR NI

SIGNIFICANTLY LOWER THAN THE AVERAGE FOR NI

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

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

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

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

Base: n=168

INTERPRETING TNI'S 2018 VISITOR ATTITUDE SURVEY



SURVEY BACKGROUND & RATING SCALE

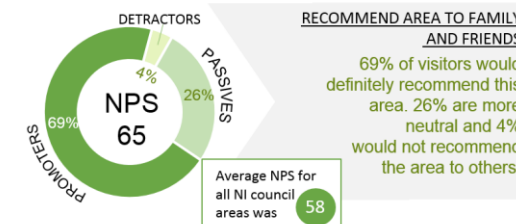
- Tourism Northern Ireland's (TNI) 2018 Visitor Attitude Survey (VAS) was carried out by Cognisense, an experienced market research company. The research was conducted in compliance with the International Standard ISO 20252:2012
- The VAS collected information on a wide range of areas to help TNI better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