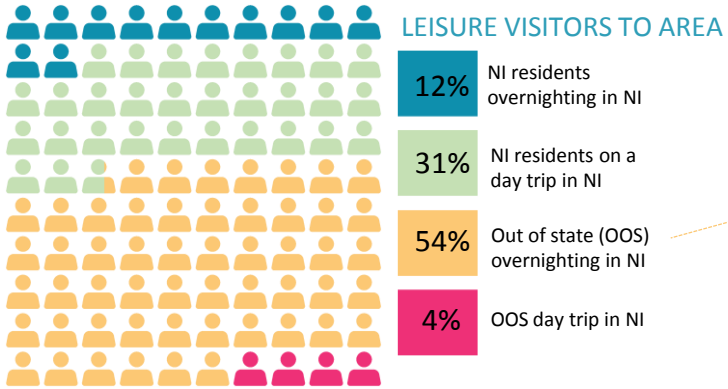


ARDS & NORTH DOWN

TNI's Visitor Attitude Survey (2018)* reports a higher proportion of local leisure visitors to Ards & North Down, particularly Northern Ireland (NI) day trippers, compared with most other areas. As such, the area welcomes a greater proportion of frequent visitors than the NI average. Great Britain is the second largest source market.

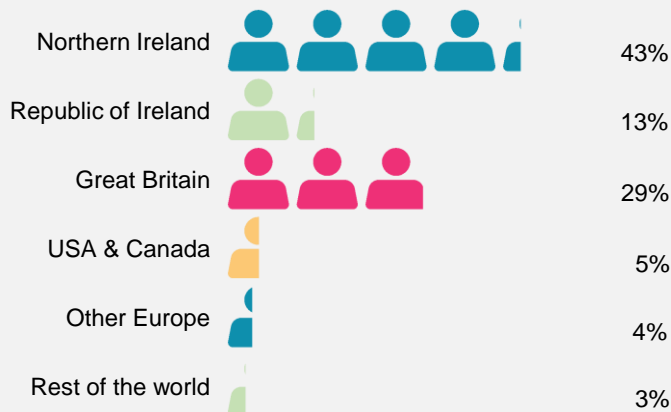
The attractions are a key motivation for visiting Ards & North Down, as well as the beautiful scenery.



58%

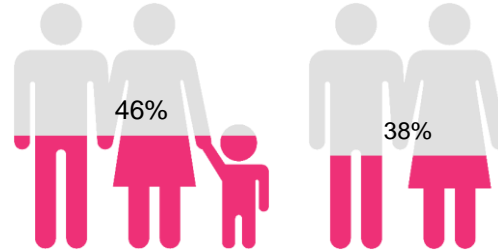
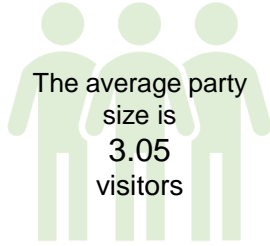
58% of visitors from out of state.

ORIGIN OF THOSE VISITING DESTINATION



PARTY TYPE

Most of the visitors (46%) travelled as a family, whilst 38% of visitors travelled as a couple. 9% travelled as a group of adults, 4% of visitors travelled alone and 3% were on a tour.



Of which 24% overnighted in the area and 30% overnighted elsewhere in NI

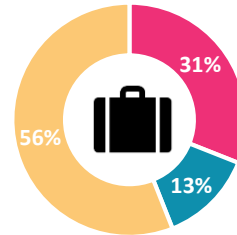
76% of OOS visitors decided to visit Ards & North Down before arriving in NI.

VISITING THE REPUBLIC OF IRELAND

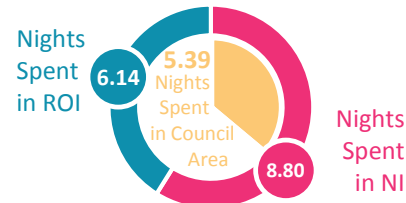
39% of OOS visitors were visiting NI for the first time. A smaller percentage than most areas.



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

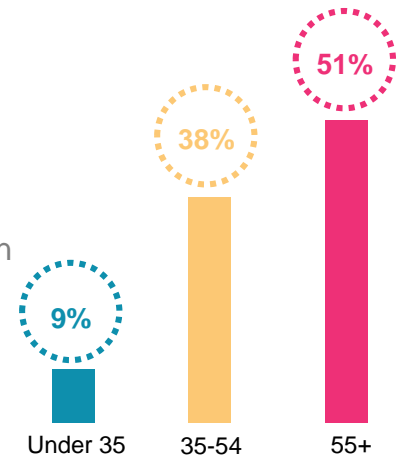


44% of those from outside NI/Republic of Ireland (ROI) who visited this area also visited the ROI.

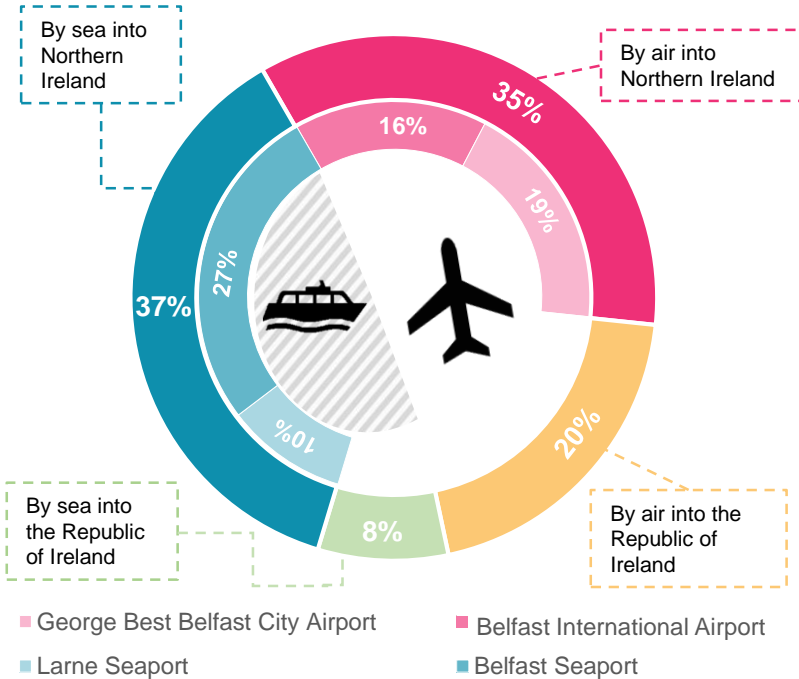


AGE

Ards & North Down attracts an older profile of visitor, with more than half being aged 55 or over and just 9% aged under 35



MEANS OF TRANSPORT INTO THE ISLAND OF IRELAND



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

Total Base: n=267

AREAS AND ATTRACTIONS ALSO VISITED IN NI

Attractions that influenced leisure visitors to come to Northern Ireland

In addition to experiencing the popular Belfast and Causeway Coast & Glens areas, those visiting this area were also more likely to be visiting Newry, Mourne & Down within the same trip (suggesting a tour of the East coast as a key focus of the visitor trip).



45%
Giant's Causeway



37%
Titanic Belfast



38%
Belfast City



11%
Derry-Londonderry

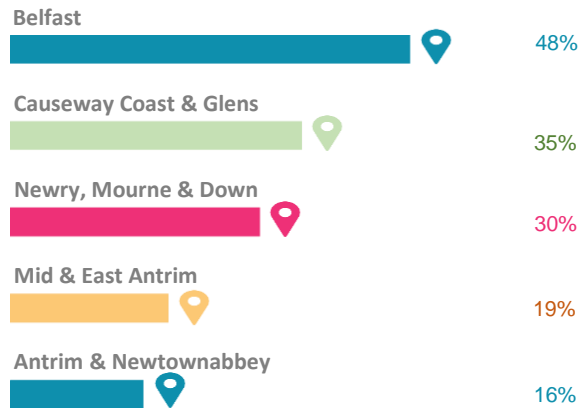


37%
Causeway Coastal Route



11%
Game of Thrones locations

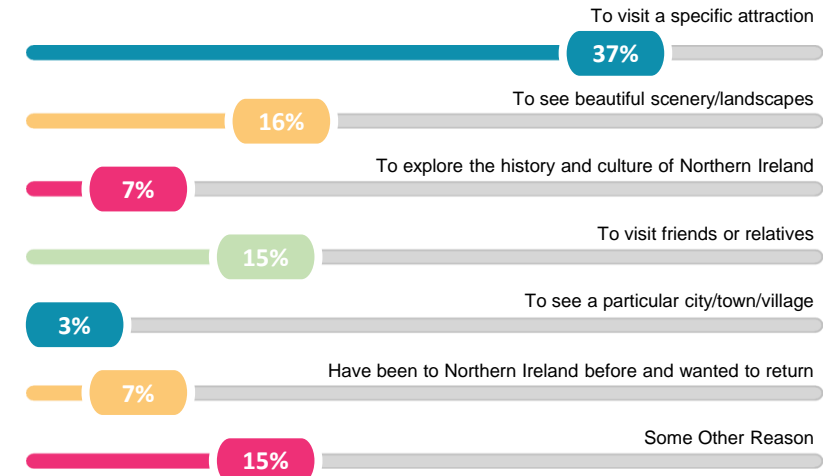
TOP 5 AREAS VISITED



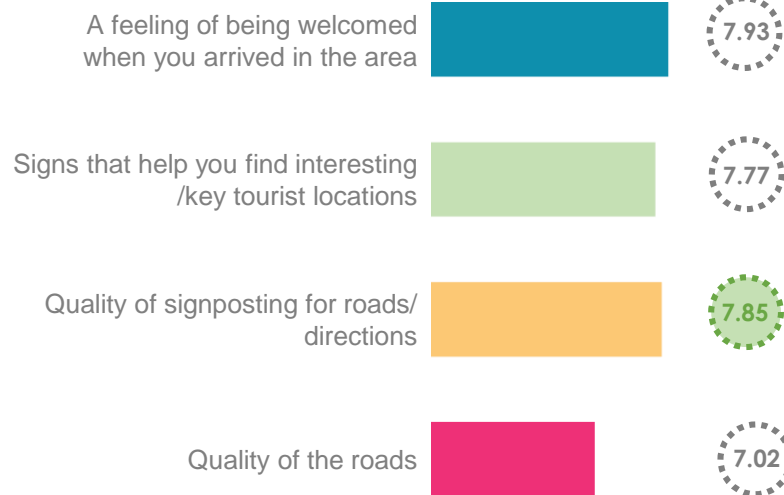
MOST IMPORTANT REASON FOR VISITING THE AREA

The main reason for visiting Ards & North was "To visit a specific attraction" (37%).

The beautiful scenery was another key motivator for visiting the area. Visitors to Ards & North Down were less interested in seeing particular towns or exploring the history & culture of the area.



GETTING AROUND THE AREA



= Significantly lower than the average for all areas

= Significantly higher than the average for all areas

In line with the prevalence of local NI visitors, there is a higher than average proportion of visitors using their own car. Relative to other NI areas, visitors to Ards & North Down were more satisfied with the availability and cost of car parking, but less content with the availability of roadside viewing bays.

(Average score on scale from 0 – 10)



7.33
OVERALL SATISFACTION SCORE

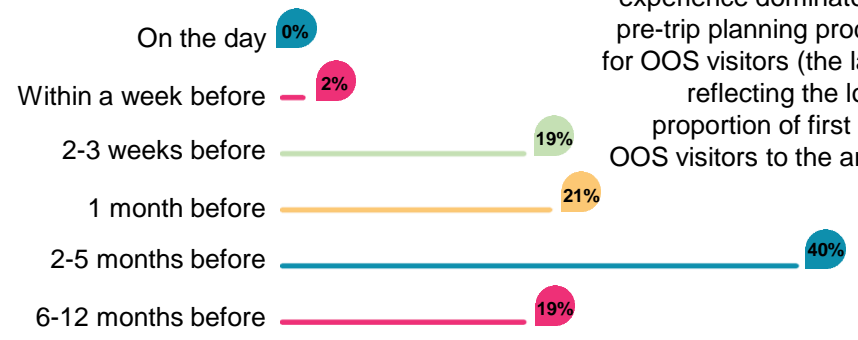
SOURCE: Tourism Northern Ireland: Visitor Attitude Survey 2018, Cognisense Ltd.

Base: n=267

PLANNING & INFORMATION

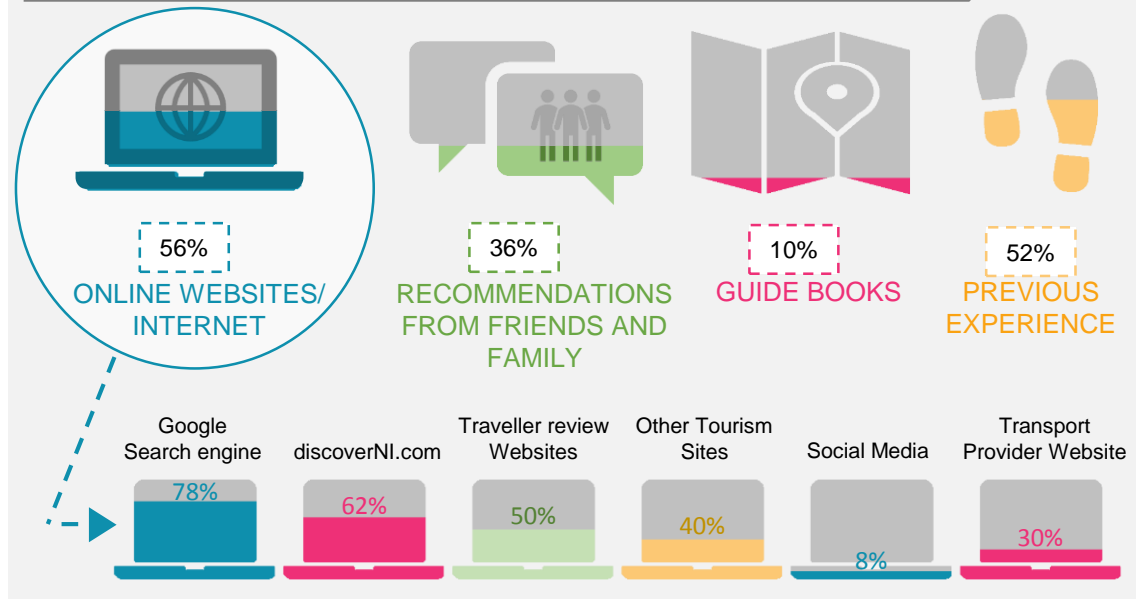
PLANNING TIMESCALE FOR NI

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

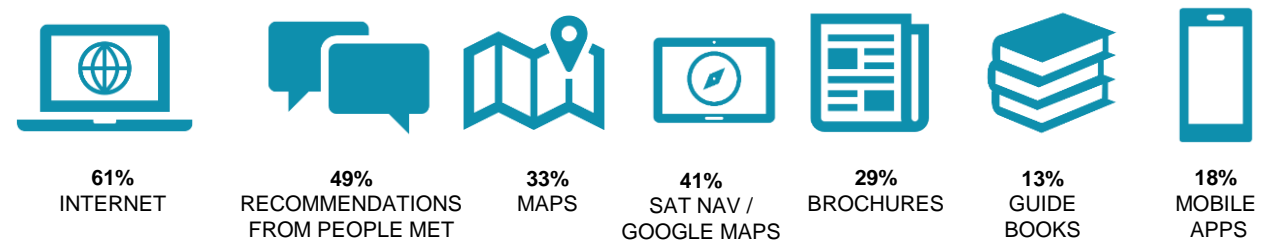


Most OOS leisure visitors planned their trip 2-5 months ahead. Online sources and previous experience dominate the pre-trip planning process for OOS visitors (the latter reflecting the lower proportion of first time OOS visitors to the area).

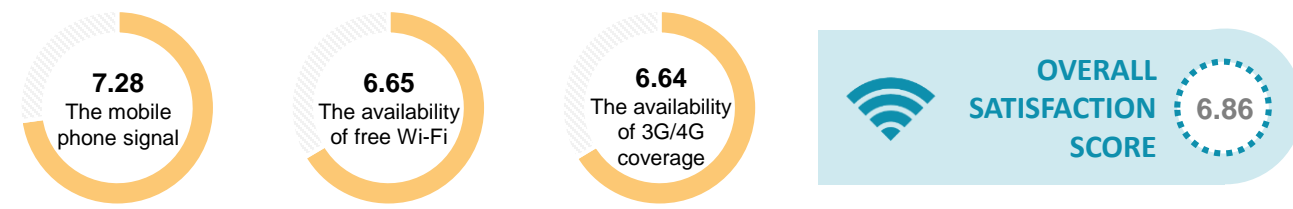
PRE-TRIP PLANNING RESOURCES



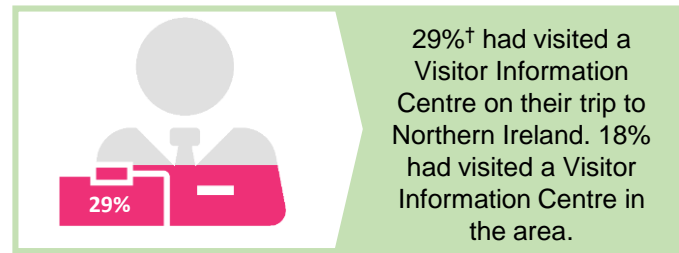
INFORMATION RESOURCES USED WHILST IN NI



DIGITAL CONNECTIVITY



VISITOR INFORMATION CENTRES



As a consequence of the higher than average volume of repeat visitors, there is a lower than average use of Visitor Information Centres and a greater reliance on previous experience.

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

29% 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=267

ACCOMMODATION



29%
Hotel

Relative to other areas of NI, leisure visitors to Ards & North Down were more likely to stay with family/friends. Hotels and self-catering were the most popular types of commercial accommodation used.



26%
Self-Catering

Many aspects of the eating out experience scored above the NI average (e.g. the friendly/efficient staff, value for money and menus that feature local ingredients). Visitors were less impressed than in other areas about the knowledge/signposting of their accommodation staff to interesting things to see and do locally.



9%
Guest House/
B&B



3%
Camping/Static
Caravan



5%
Motorhome/
Touring
Caravan

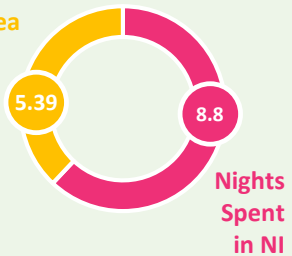


31%
Staying with
Family/Friends
Almost double the
Northern Ireland average

27% of all guest houses, B&Bs and self-catering accommodation was booked through Airbnb.



Nights Spent
in Council
Area



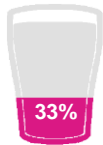
PLACES TO EAT



OVERALL
SATISFACTION SCORE

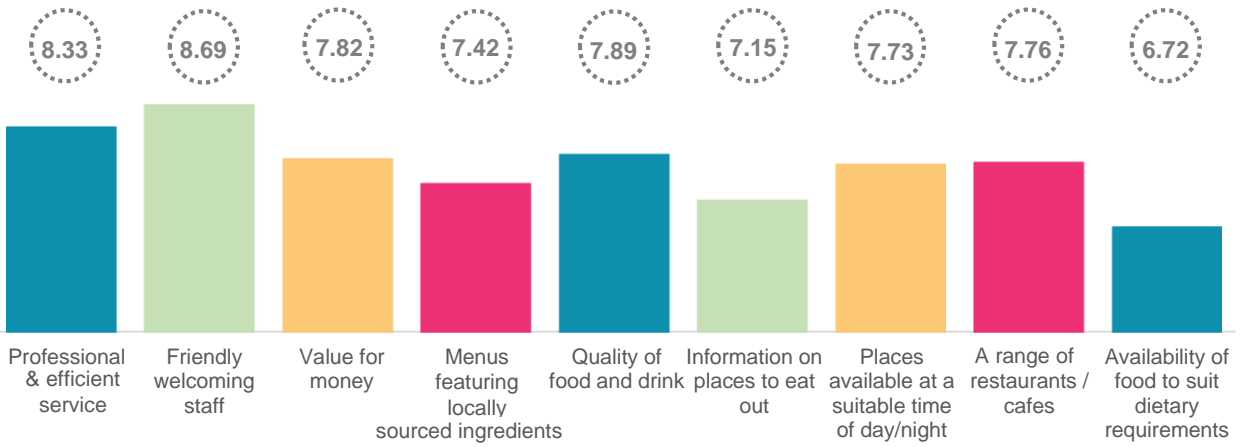


Cafes



Pubs / Bars

Most Popular
types of
places to eat



ACCOMMODATION RATINGS



86% of visitors with children described the accommodation available as "family friendly for children of all ages".



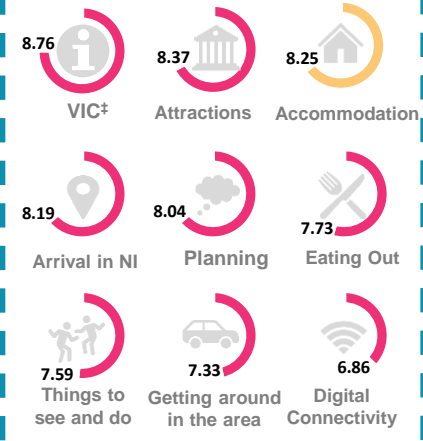
OVERALL SATISFACTION SCORE

88% of visitors with children said that the places to eat are "family friendly for children of all ages".

95% of visitors said that the quality of the accommodation they stayed in exceeded or met their expectations. Expectations were greatly exceeded for 10%.

83% of visitors agreed that they were able to stay in their preferred type of accommodation. Only 2% were not.

Visitor Information Centres were rated highly. The attractions and accommodation experience in Ards & North Down scored well also. Digital connectivity is the area where visitors are least satisfied.



* Visitor Information Centre

SOURCE: Tourism Northern Ireland: Visitor Attitude Survey 2018, Cognisense Ltd.
Base: n=267

ATTRACTIONS & ACTIVITIES

Leisure visitors to this area were more likely than visitors to many other areas to visit historic buildings and forest parks/gardens (notably Mount Stewart House & Gardens); museums (notably the Ulster Folk & Transport Museum) and beaches. They were very positive about the friendliness/professionalism of staff at these attractions but less happy about the cleanliness of the beaches and the area in general.

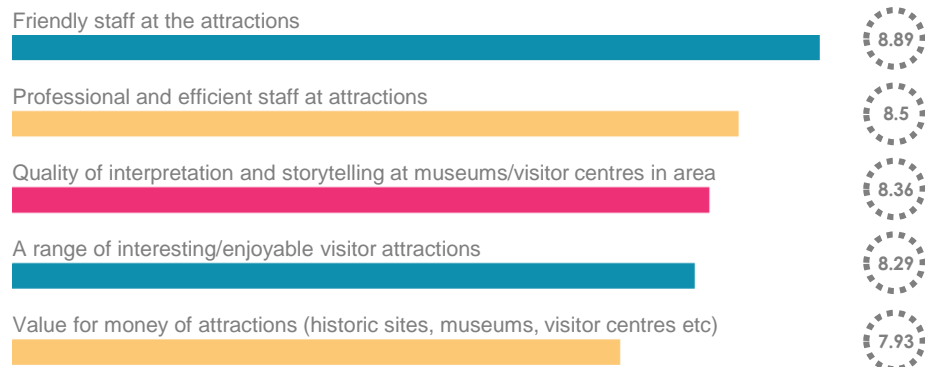
88% of visitors with children said that the attractions are "family friendly for children of all ages"



TOP ATTRACTIONS VISITED IN THE AREA



RATINGS OF ATTRACTIONS IN THE AREA



8.37

OVERALL SATISFACTION SCORE



RATINGS OF THINGS TO SEE & DO IN THE AREA



OVERALL SATISFACTION SCORE

7.59



7.68

Satisfaction with cleanliness in the area

7.20

Cleanliness and availability of public toilets in the area

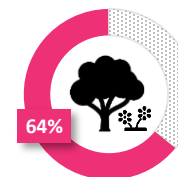
8.50

Satisfaction with safety in the area

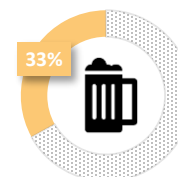
SOURCE: Tourism Northern Ireland: Visitor Attitude Survey 2018, Cognisense Ltd. Base: n=267

THINGS SEEN AND DONE

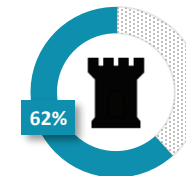
Visited a forest, park or garden



Visited a pub



Visited a castle /other historic monument



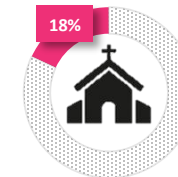
Went shopping



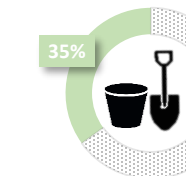
Visited a museum or art gallery



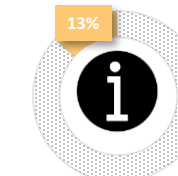
Visited a cathedral or church



Visited a beach



Visited a visitor /interpretation centre



tourism northernireland

BEST EXPERIENCES IN THE AREA

Sightseeing around Strangford Lough and the stunning scenery.

Genuine down to earth friendly people and beautiful scenery.

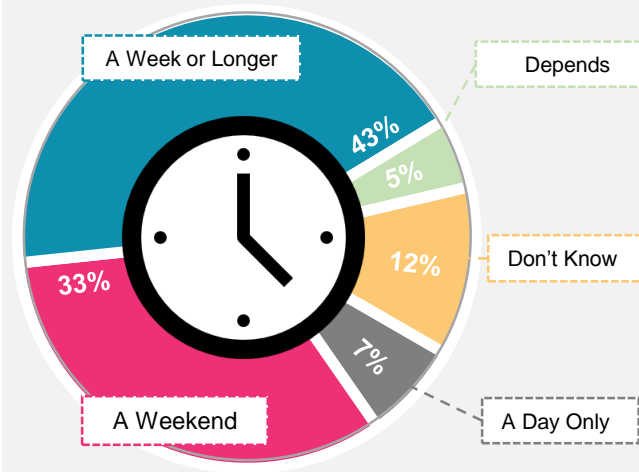
The house and garden at Mount Stewart were really quite amazing - never suspected that there would be so much history and beauty there and the interest and explanations given by the staff in the house and around the grounds was really second to none. Over and beyond expectations and showed much pride and knowledge in what they did and represented and a great reflection of the National Trust at Mount Stewart. All round absolutely fantastic day out!

Really enjoyed the scenery, quiet roads, good food and friendly helpful people.

A wonderful holiday. We should have visited a lot sooner. Great, friendly people. Scenery to die for, just a wonderful place.

IS THERE ENOUGH TO DO IN THE AREA

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



There was enough to do in all weather conditions

7.33

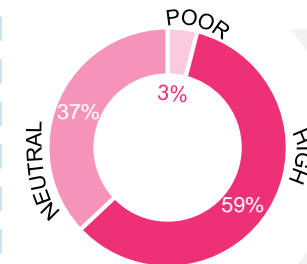
There was enough to do in the evenings

6.88

There was enough to do on Sundays

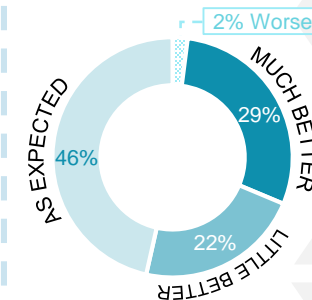
6.94

DESTINATION EXPERIENCE



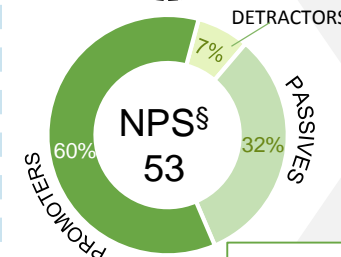
OVERALL EXPERIENCE

59% of visitors rate their experience in this area highly. 37% are more neutral about their experience and only 3% would regard their experience in the area as poor.



EXCEEDING EXPECTATIONS

29% of visitors said the trip to the area was "much better than expected". 68% said it was around the same or slightly better and only 2% said it was "worse than expected".



RECOMMEND AREA TO FAMILY AND FRIENDS

60% of visitors would definitely recommend this area. 32% are more neutral and 7% would not recommend the area.

NPS[§]
53

Average NPS for all NI council areas was 58

Over half of visitors had an experience that was beyond their expectation. Relative to many other areas in NI, leisure visitors are more persuaded that Ards & North Down warranted a week's stay. There is scope to widen the evening offering and things to do on Sundays.

[§](NPS) = Net Promoter Score®

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

Base: n=267

ARDS & NORTH DOWN

		MEASURE	ARDS & NORTH DOWN	NORTHERN IRELAND
PLANNING & BOOKING	8.04	The availability of useful information to help you to plan your trip	8.28	8.14
		The availability/ease of finding information about the different regions within Northern Ireland	8.38	8.11
		Ease of finding information on the area	8.09	8.27
		Ease of finding information on things to see and do in Northern Ireland	8.55	8.43
		Ease of finding suitable accommodation in Northern Ireland	8.19	8.14
		Ease of finding suitable accommodation in the area	---	7.96
		Ease of booking activities and attractions online	8.03	7.75
		Ease of booking accommodation online	8.72	8.49
ARRIVAL	8.19	Ease of booking transport within Northern Ireland	6.76	7.19
		A feeling of being welcomed when you arrived in Northern Ireland	8.45	8.11
		Clear signs to let you know when you have arrived in Northern Ireland	8.30	7.48
GETTING AROUND IN THE AREA	7.33	The availability of tourist information at the air or sea port you arrived at	---	7.45
		Signs that help you find interesting/key tourist locations	7.77	7.69
		Quality of signposting for roads/directions	7.85	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	7.11	7.09
		A feeling of being welcomed when you arrived in the area	7.93	8.08
		Places by the road to stop while driving and view the landscape	6.41	6.74
		Availability and cost of parking	7.52	7.14
VISITOR INFORMATION IN THE AREA	8.76	Signposting for exploring the area by foot	6.88	7.08
		Quality of the roads	7.02	7.15
		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=267



SIGNIFICANTLY HIGHER THAN THE AVERAGE FOR NI

SIGNIFICANTLY LOWER THAN THE AVERAGE FOR NI

EXPERIENCE OF ARDS & NORTH DOWN

---- = INSUFFICIENT BASE

	MEASURE	ARDS & NORTH DOWN	NI	
DIGITAL CONNECTIVITY	6.86	The mobile phone signal	7.28	7.47
		The availability of free Wi-Fi	6.65	6.97
		The availability of 3G/4G coverage	6.64	6.82
EATING OUT	7.73	Professional, efficient service	8.33	8.22
		Friendly, welcoming staff	8.69	8.54
		Value for money	7.82	7.73
		Menus featuring locally sourced ingredients	7.42	7.34
		Quality of food and drink	7.89	7.98
		Information on places to eat and drink out	7.15	7.17
		Places to eat available at the times of day and night that suit you	7.73	7.75
		Range of restaurants/cafes/coffee shops	7.76	7.74
		Availability of food to suit dietary requirements – vegetarian/vegan/gluten free	6.72	7.08
		Availability of free Wi-Fi	7.88	8.12
ACCOMMODATION	8.25	Quality of accommodation	8.52	8.46
		Value for money of accommodation	8.18	8.22
		Professional and efficient customer service	8.46	8.57
		Friendly and welcoming staff/host	8.85	8.87
		Accommodation that is a key part of the holiday experience itself	8.18	8.12
		Staff knowledgeable about interesting things to see and do in local area	7.70	8.07
		Availability of free Wi-Fi	7.88	8.12
ATTRACTIONS	8.37	Value for money of attractions (historic sites, museums, visitor centres etc.)	7.93	7.95
		Information at visitor attractions in your own language	---	5.80
		A range of interesting/enjoyable visitor attractions	8.29	8.34
		Quality of interpretation and storytelling at museums/visitor centres in area	8.36	8.27
		Professional and efficient staff at attractions	8.50	8.56
		Friendly staff at the attractions	8.89	8.80
THINGS TO SEE AND DO	7.59	Unique things to do and see that reflect the area's local culture	7.93	8.12
		The range of outdoor activities	7.69	7.80
		Opportunities to attend local events/festivals	7.03	6.91
		Range of interesting/enjoyable things to see/do in the area	8.21	8.20
		Shopping opportunities	7.22	7.16
Somewhere you could meet and mix with the local people	7.48	7.59		

	MEASURE	ARDS & NORTH DOWN	NI
EXPERIENCE	Cities, towns & villages	7.97	8.15
	Activities	7.77	7.83
	Beautiful scenery/landscapes	8.80	8.90
	Friendly local people	8.33	8.47
	Rich history and culture of area/NI	8.34	8.61
	Ability to trace ancestral links	5.31	6.05
	Availability of special offers e.g. Groupon deal/good deal on accommodation	4.73	5.58
	Screen tourism	6.10	7.14
	Overall experience during this visit, based on the time you spent in area	8.72	8.77
	ENOUGH TO DO	There was enough to do in all weather conditions	7.33
There was enough to do in the evenings		6.88	7.16
There was enough to do on Sundays		6.94	6.90
CLEANLINESS/ SAFETY	Cleanliness and availability of public toilets	7.20	7.21
	Cleanliness of area/litter free	7.68	7.93
	Cleanliness of the beaches	8.05	8.41
	Sense of safety and security while walking around the area	8.50	8.43

The overall score for attractions in Ards & North Down was above the NI average, with the friendliness of staff scoring strongly.

general, and the beaches in particular, would help enhance the visitor experience.

As the beautiful scenery was the second most important reason for visiting the area, improving the cleanliness of the area in

Given the large number of visitors using their own car, improving the provision of roadside viewing bays should be considered.

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=267

INTERPRETING TNI'S 2018 VISITOR ATTITUDE SURVEY



SURVEY BACKGROUND & RATING SCALE

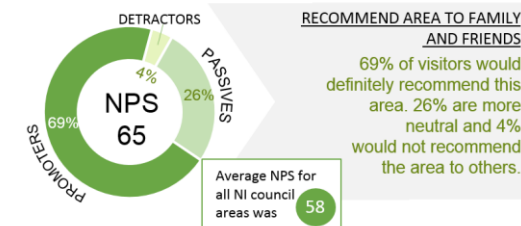
- Tourism Northern Ireland's (TNI) 2018 Visitor Attitude Survey (VAS) was carried out by Cognisense, an experienced market research company. The research was conducted in compliance with the International Standard ISO 20252:2012
- The VAS collected information on a wide range of areas to help TNI better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

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

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

NET PROMOTER SCORES

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



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

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



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

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

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