

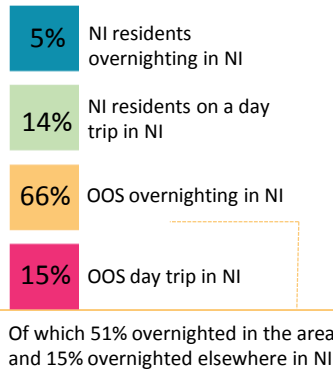
DERRY CITY & STRABANE

TNI's Visitor Attitude Survey (2018)* reports a higher proportion of out of state (OOS) leisure visitors to Derry City & Strabane compared with most other areas of Northern Ireland (NI), with North America, Great Britain and Other Europe the primary OOS markets.

Exploring the history and culture are key reasons for visiting the area and the friendliness of the local people remains a key aspect of the overall experience.



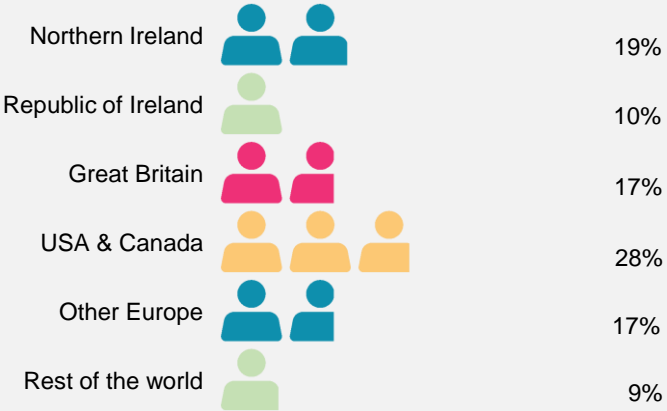
LEISURE VISITORS TO AREA



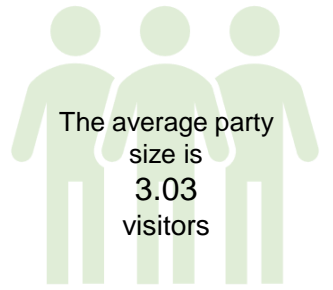
81%

81% of visitors from out of state.

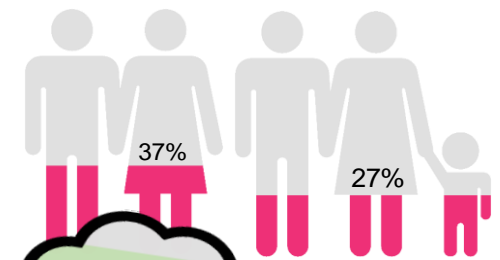
ORIGIN OF THOSE VISITING DESTINATION



PARTY TYPE



25% of those visiting the area were families. The second lowest percentage in Northern Ireland.

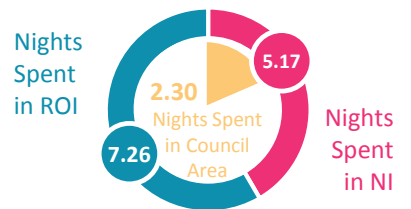


The majority of visitors (37%) travelled as a couple, whilst 27% of visitors travelled as a family. 18% travelled as a group of adults and 10% were on a tour. 7% of visitors travelled alone.

86% of OOS visitors decided to visit Derry City & Strabane before arriving in NI.

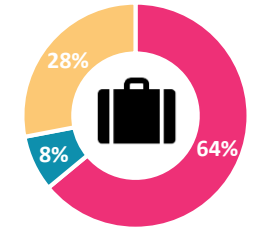
Derry City & Strabane attracts a higher proportion of OOS visitors, particularly OOS visitors staying overnight in the area, albeit for a shorter stay. Visitors to the area are more likely to have flown into the Republic of Ireland (ROI). Encompassing the second major City of NI, Derry City & Strabane attracts a higher level of first time visitors.

78% of OOS visitors were visiting NI for the first time



VISITING THE REPUBLIC OF IRELAND

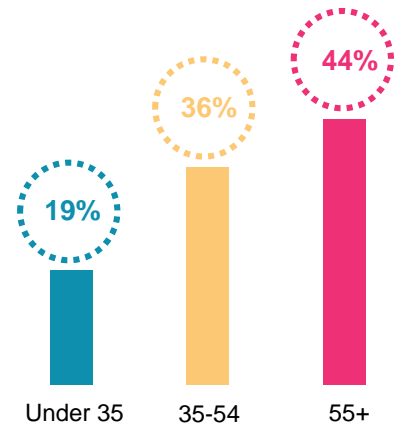
- Overnight Trip to ROI
- Day Trip to ROI
- No Trip to ROI



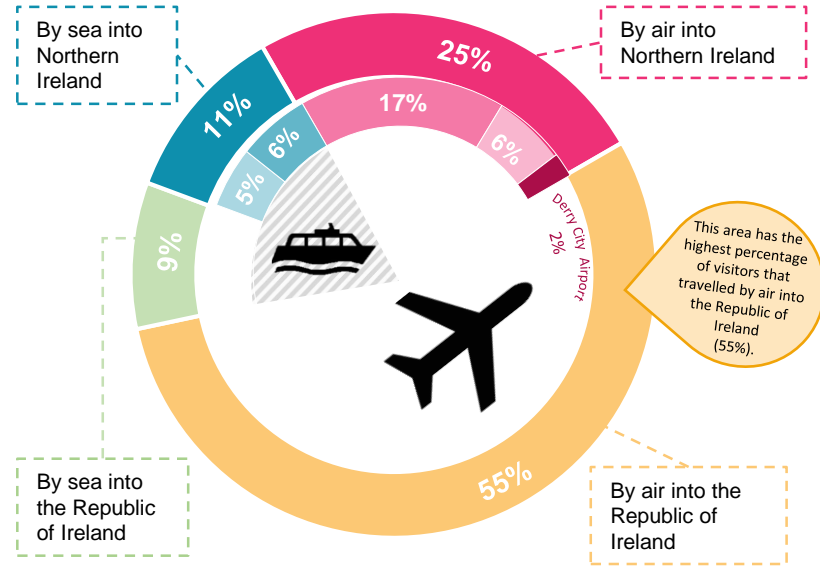
72% of those from outside NI/ROI who visited this area also visited the ROI.

AGE

While the majority of visitors to the area are aged 35 or over, Derry City & Strabane attracts a higher proportion of younger visitors than many other areas.



MEANS OF TRANSPORT INTO THE ISLAND OF IRELAND



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

*SOURCE: Tourism Northern Ireland: Visitor Attitude Survey 2018, Cognisense Ltd. Total Base: n=366, OOS n=295

AREAS AND ATTRACTIONS ALSO VISITED IN NI

Attractions that influenced leisure visitors to come to Northern Ireland



66%
Derry-Londonderry



48%
Belfast City



64%
Giant's Causeway



31%
Titanic Belfast

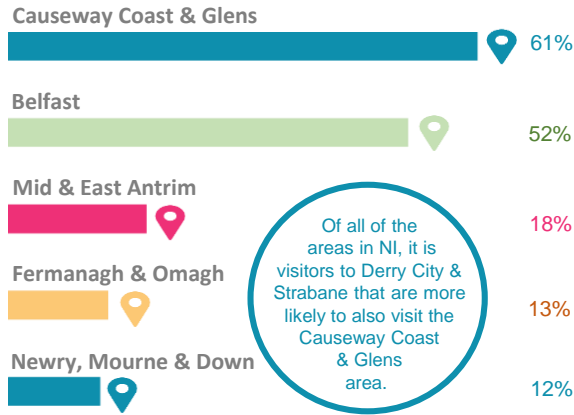


52%
Causeway Coastal Route



19%
Game of Thrones locations

TOP 5 OTHER AREAS VISITED

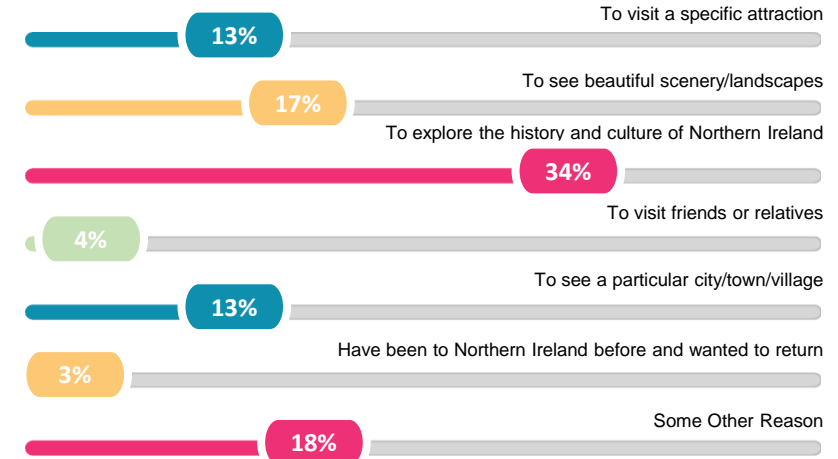


Of all of the areas in NI, it is visitors to Derry City & Strabane that are more likely to also visit the Causeway Coast & Glens area.

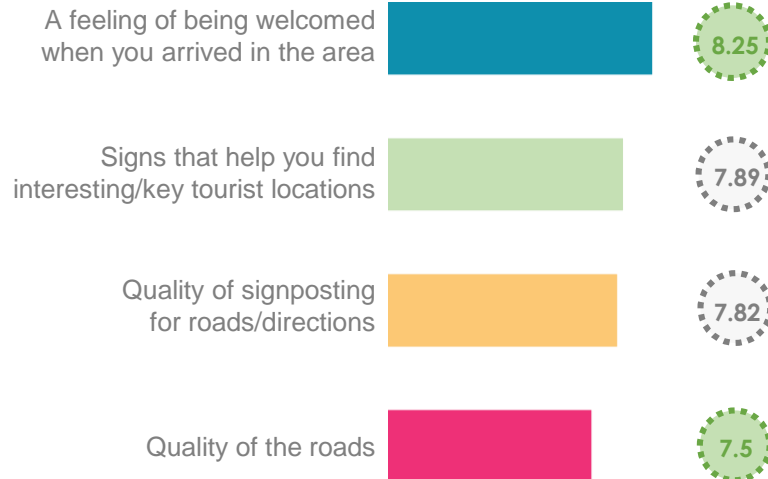
MOST IMPORTANT REASON FOR VISITING THE AREA

The reason for visiting Derry City & Strabane that has the most importance is "explore the history and culture of Northern Ireland" (34%).

Relative to other areas of NI, visitors to Derry City & Strabane place significantly more importance on exploring the history & culture of the area. This is reflected in their activities, with many visiting a museum/art gallery, a pub and/or taking a guided tour



GETTING AROUND THE AREA



= Significantly lower than the average for all areas

= Significantly higher than the average for all areas

Places by the road to stop while driving and view the landscape



Leisure visitors to Derry City & Strabane were more satisfied than visitors to most other areas about the welcome on arrival, the signposting for pedestrians walking around the area and the quality of the roads.

Availability and cost of parking



Signposting for exploring the area by foot



7.65
OVERALL SATISFACTION SCORE

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

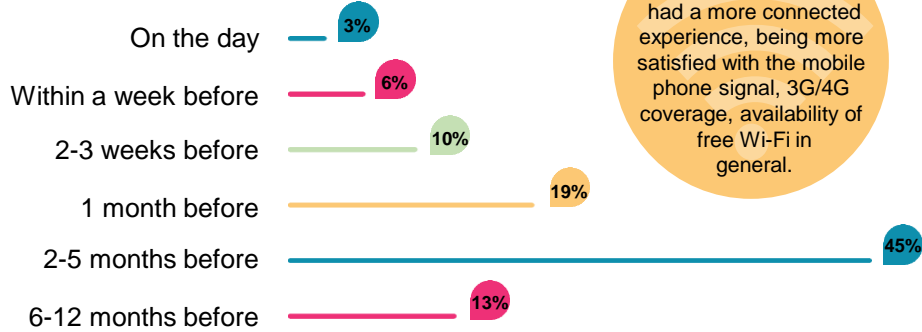
Total Base: n=366, OOS n=295

PLANNING & INFORMATION

Compared to many other areas, Derry City & Strabane leisure visitors found it easier to book their trip and to find information on the City. They made more use of Visitor Information Centres (VICs) and scored their VIC experience higher than most other areas.

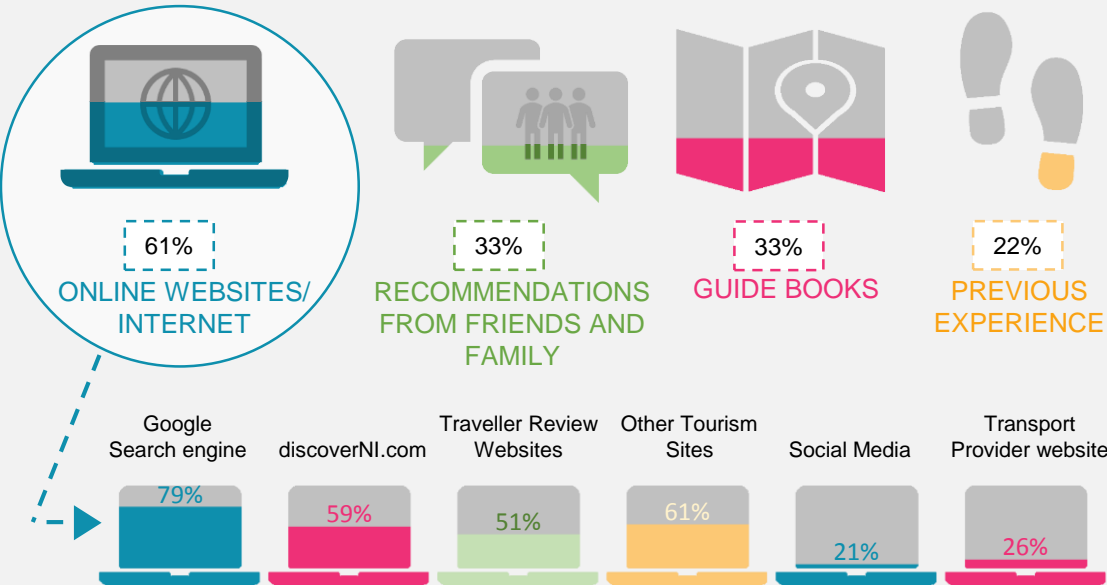
PLANNING TIMESCALE FOR NI

OOS visitors began booking and planning their trip...

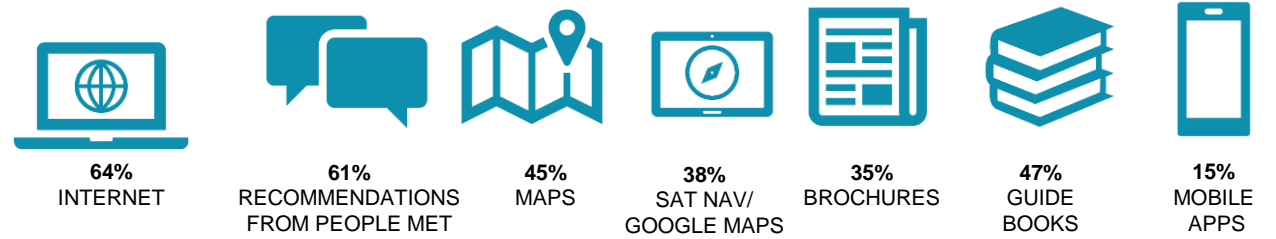


Visitors to Derry City & Strabane had a more connected experience, being more satisfied with the mobile phone signal, 3G/4G coverage, availability of free Wi-Fi in general.

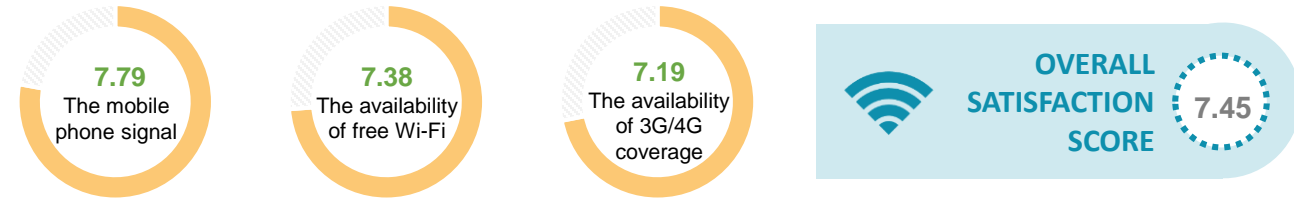
PRE-TRIP PLANNING RESOURCES



INFORMATION RESOURCES USED WHILST IN NI



DIGITAL CONNECTIVITY

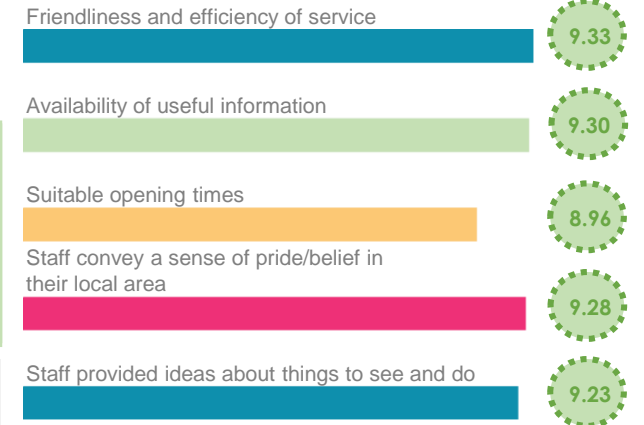


VISITOR INFORMATION CENTRES

49%[†] had visited a Visitor Information Centre on their trip to Northern Ireland. 37% had visited a Visitor Information Centre in the area.

41% 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 the area.



SOURCE: Tourism Northern Ireland: Visitor Attitude Survey 2018, Cognisense Ltd.
Total Base: n=366, OOS n=295

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

ACCOMMODATION



40%
Hotel



16%
Self-Catering



30%
Guest House/
B&B



2%
Camping/Static
Caravan



3%
Motorhome/
Touring
Caravan



8%
Staying with
Family/Friends

While hotels are the most popular choice, leisure visitors to Derry City & Strabane are significantly more likely to stay in guest houses/B&Bs compared to most other areas in NI. They are also generally more satisfied with most aspects of the eating out experience (particularly the friendliness and efficiency of staff, the quality of food, the value for money and the availability of local foods). They are less confident that there is enough information on where to eat or eateries that deal with special dietary needs.

PLACES TO EAT



OVERALL SATISFACTION SCORE

8.07



57%
Cafes



57%
Pubs/Bars

Most Popular
types of
places to eat



ACCOMMODATION RATINGS

Quality of accommodation



8.42

Value for money



8.27

Professional and efficient customer service



8.74

Friendly and welcoming staff/host



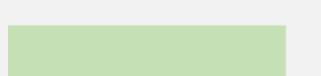
8.97

Accommodation that is a key part of the holiday experience itself



7.94

Staff knowledgeable about interesting things to see and do in local area



8.01

Availability of free Wi-Fi



8.29

8.38

OVERALL SATISFACTION SCORE



100% of visitors with children said that the places to eat are "family friendly for children of all ages".



36%

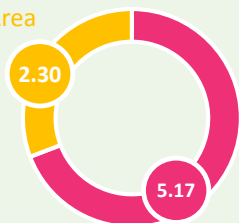


of all guest houses, B&Bs and self-catering accommodation was booked through Airbnb.

65% of visitors with children described the accommodation available as "family friendly for children of all ages".



Nights Spent in Council Area

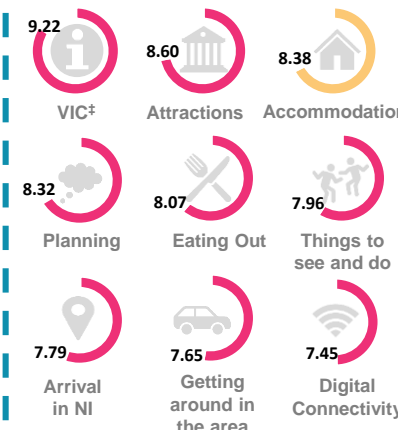


Nights Spent in NI

95% of visitors said that the quality of the accommodation they stayed in exceeded or met their expectations. For 16% expectations were greatly exceeded.

90% of visitors agreed that they were able to stay in their preferred type of accommodation. Only 1% were not.

Visitor Information Centres are rated strongly, as are the visitor attractions and the accommodation experience. Digital connectivity is the area where visitors to Derry City & Strabane are least satisfied.



* Visitor Information Centre

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

Total Base: n=366, OOS n=295

ATTRACTIONS & ACTIVITIES

Leisure visitors to Derry City & Strabane were more likely to see the area as offering a wide range of attractions and things to see and do, particularly those that reflect the area's local culture. The friendliness of staff at attractions and the opportunity to meet and mix with local people were rated more positively than in most other areas of NI.

75% 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

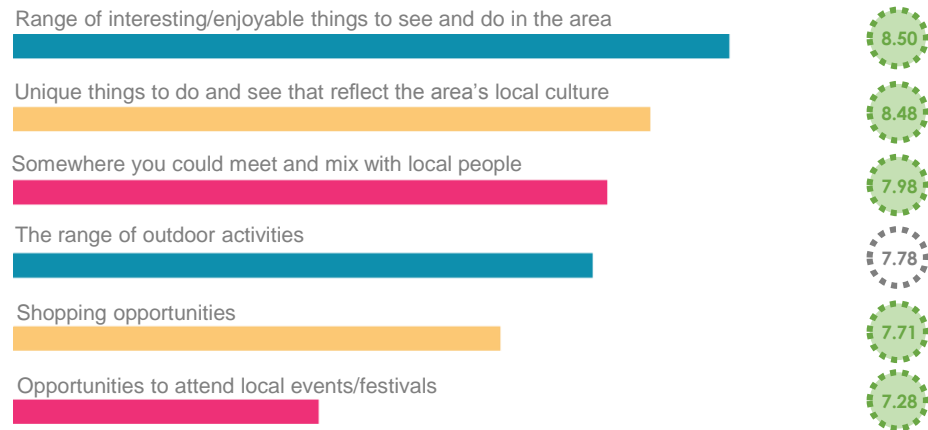


8.60

OVERALL SATISFACTION SCORE



RATINGS OF THINGS TO SEE & DO IN THE AREA



OVERALL SATISFACTION SCORE

7.96



8.26

Satisfaction with cleanliness in the area

7.64

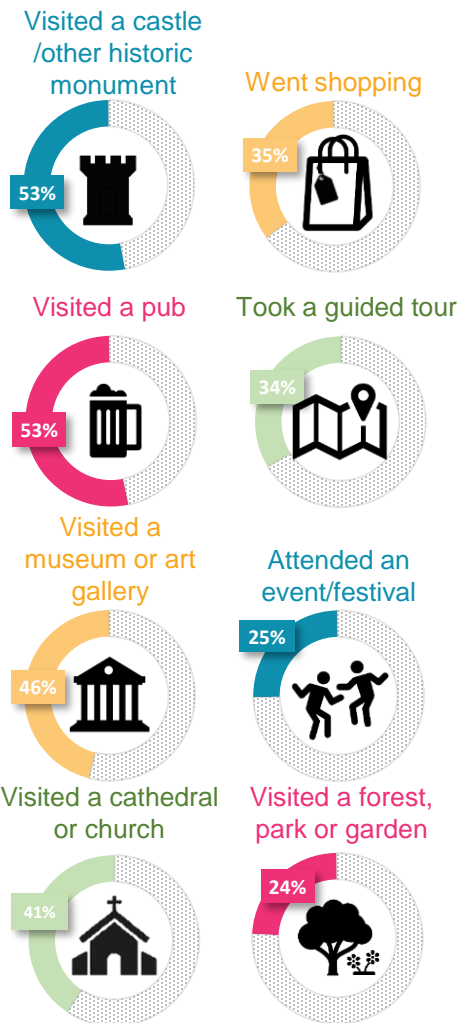
Cleanliness and availability of public toilets in the area

8.59

Satisfaction with safety in the area

SOURCE: Tourism Northern Ireland: Visitor Attitude Survey 2018, Cognisense Ltd.
Total Base: n=366, OOS n=295

THINGS SEEN AND DONE



Only 50% of visitors with children said that the things to do and see in the area are "family friendly for children of all ages".



tourism northernireland

BEST EXPERIENCES IN THE AREA

Walking the city walls in Londonderry and reading the information boards that were provided. Being able to see places that you had heard about in history books and in the news.

Walking the walls and going into the bogside to see all the murals. We enjoyed walking around the beautiful city, you could just tell the city was steeped in history and culture. We loved everything about it!

The tour of Guildhall was fantastic. Our guide was probably the best tour guide ever. [Their] ability to bring history to life with [their] booming voice was an experience I will not forget. Based on this, our next trip to Ireland will be focused on NI for the entire visit.

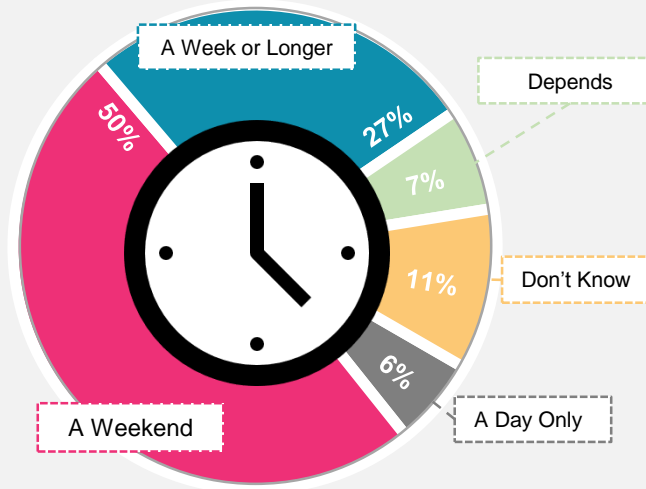
Honesty and kindness of the people. We loved Northern Ireland and would love to visit again soon.

As a geologist, actually walking on the Giant's Causeway has always been on my bucket list; however, 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!!

The friendliness & politeness of people we met in the street when asking for directions and those in shops and cafes.

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

7.95

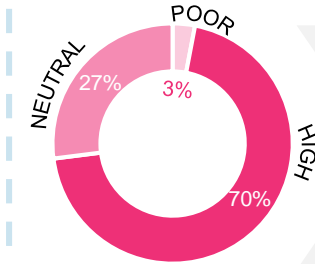
There was enough to do in the evenings

7.74

There was enough to do on Sundays

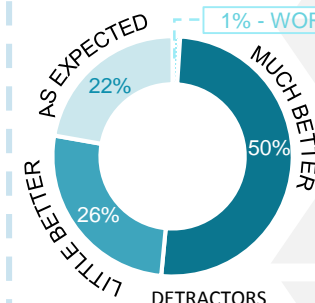
7.22

DESTINATION EXPERIENCE



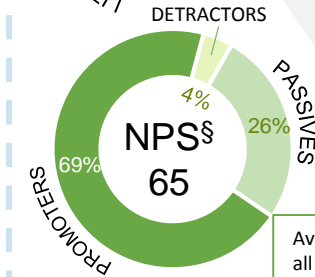
OVERALL EXPERIENCE

70% of visitors rate their experience in this area highly. 27% are more neutral about their experience and only 3% would regard their experience in the area as poor.



EXCEEDING EXPECTATIONS

50% of visitors said the trip to the area was "much better than expected". 48% said it was around the same or slightly better and only 1% said it was "worse than expected".



RECOMMEND AREA TO FAMILY AND FRIENDS

69% of visitors would definitely recommend this area. 26% are more neutral and 4% would not recommend the area to others.

Average NPS for all NI council areas was 58

Leisure visitors viewed Derry City & Strabane as offering a wider range of attractions and things to see and do than most other areas. This area is also more likely to be seen as good for all weather conditions and to offer a better evening experience. For more than three-quarters of visitors (the highest proportion of all the areas) the Derry City & Strabane experience exceeded their expectations.

§(NPS) = Net Promoter Score®

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

Total Base: n=366, OOS n=295

DERRY CITY & STRABANE

		MEASURE	DERRY CITY & STRABANE	NORTHERN IRELAND
PLANNING & BOOKING	8.32	The availability of useful information to help you to plan your trip	8.20	8.14
		The availability/ease of finding information about the different regions within Northern Ireland	8.21	8.11
		Ease of finding information on the area	8.54	8.27
		Ease of finding information on things to see and do in Northern Ireland	8.40	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	7.52	7.75
		Ease of booking accommodation online	8.85	8.49
		Ease of booking transport within Northern Ireland	7.89	7.19
ARRIVAL	7.79	A feeling of being welcomed when you arrived in Northern Ireland	8.39	8.11
		Clear signs to let you know when you have arrived in Northern Ireland	7.11	7.48
		The availability of tourist information at the air or sea port you arrived at	---	7.45
GETTING AROUND IN THE AREA	7.65	Signs that help you find interesting/key tourist locations	7.89	7.69
		Quality of signposting for roads/directions	7.82	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	7.27	7.09
		A feeling of being welcomed when you arrived in the area	8.25	8.08
		Places by the road to stop while driving and view the landscape	7.15	6.74
		Availability and cost of parking	7.05	7.14
		Signposting for exploring the area by foot	7.66	7.08
Quality of the roads	7.50	7.15		
VISITOR INFORMATION IN THE AREA	9.22	Friendliness and efficiency of service	9.33	9.08
		Availability of useful information	9.30	8.95
		Suitable opening times	8.96	8.66
		Staff convey a sense of pride/belief in their local area	9.28	8.93
		Staff provided ideas about things to see and do	9.23	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.

Total Base: n=366, QOS n=295



EXPERIENCE OF DERRY CITY & STRABANE

	MEASURE	DERRY CITY & STRABANE	NI
DIGITAL CONNECTIVITY	7.45 The mobile phone signal	7.79	7.47
	The availability of free Wi-Fi	7.38	6.97
	The availability of 3G/4G coverage	7.19	6.82
EATING OUT	8.07 Professional, efficient service	8.44	8.22
	Friendly, welcoming staff	8.83	8.54
	Value for money of eateries	8.01	7.73
	Menus featuring locally sourced ingredients	7.61	7.34
	Quality of food and drink	8.18	7.98
	Information on places to eat and drink out	7.36	7.17
	Places to eat available at the times of day and night that suit you	8.11	7.75
	Range of restaurants/cafes/coffee shops	8.05	7.74
	Availability of food to suit dietary requirements – vegetarian/vegan/gluten free	7.40	7.08
	ACCOMMODATION	8.38 Quality of accommodation	8.42
Value for money of accommodation	8.27	8.22	
Professional and efficient customer service	8.74	8.57	
Friendly and welcoming staff/host	8.97	8.87	
Accommodation that is a key part of the holiday experience itself	7.94	8.12	
Staff knowledgeable about interesting things to see and do in local area	8.01	8.07	
Availability of free Wi-Fi	8.29	8.12	
ATTRACTIONS	8.60 Value for money of attractions (historic sites, museums, visitor centres etc.)	8.35	7.95
	Information at visitor attractions in your own language	6.43	5.80
	A range of interesting/enjoyable visitor attractions	8.63	8.34
	Quality of interpretation and storytelling at museums/visitor centres in area	8.57	8.27
	Professional and efficient staff at attractions	8.85	8.56
Friendly staff at the attractions	9.06	8.80	
THINGS TO SEE AND DO	7.96 Unique things to do and see that reflect the area's local culture	8.48	8.12
	The range of outdoor activities	7.78	7.80
	Opportunities to attend local events/festivals	7.28	6.91
	Range of interesting/enjoyable things to see/do in the area	8.50	8.20
	Shopping opportunities	7.71	7.16
Somewhere you could meet and mix with the local people	7.98	7.59	

	MEASURE	DERRY CITY & STRABANE	NI
EXPERIENCE	8.50 Cities, towns & villages	8.15	8.15
	7.82 Activities	7.83	7.83
	8.87 Beautiful scenery/landscapes	8.90	8.90
	8.69 Friendly local people	8.47	8.47
	9.01 Rich history and culture of area/NI	8.61	8.61
	6.27 Ability to trace ancestral links	6.05	6.05
	5.61 Availability of special offers e.g. Groupon deal/good deal on accommodation	5.58	5.58
	6.93 Screen tourism	7.14	7.14
	8.99 Overall experience during this visit, based on the time you spent in area	8.77	8.77
	ENOUGH TO DO	7.95 There was enough to do in all weather conditions	7.50
7.74 There was enough to do in the evenings		7.16	7.16
7.22 There was enough to do on Sundays		6.90	6.90
CLEANLINESS/SAFETY	7.64 Cleanliness and availability of public toilets	7.21	7.21
	8.26 Cleanliness of area/litter free	7.93	7.93
	8.76 Cleanliness of the beaches	8.41	8.41
	8.59 Sense of safety and security while walking around the area	8.43	8.43

Derry City & Strabane is seen to offer a wide range of attractions and activities, providing a positive visitor experience that enabled the exploration of local history and culture.

The people that leisure visitors to Derry City & Strabane meet are the stars of the show, with the friendly/efficient staff and opportunities to mix with the locals enhancing the visitor experience.

As a result, this area enjoys the highest ratings for recommendation to friends and family.

Visitors to Derry City & Strabane are more likely than visitors to any of the other NI areas to have had a better experience than they had anticipated.

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](#).

INTERPRETING TNI'S 2018 VISITOR ATTITUDE SURVEY



SURVEY BACKGROUND & RATING SCALE

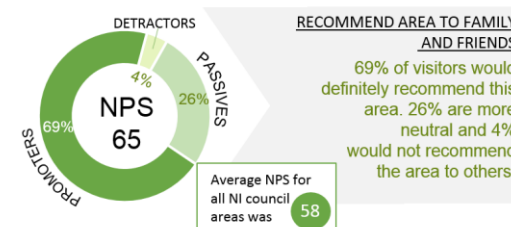
- Tourism Northern Ireland's (TNI) 2018 Visitor Attitude Survey (VAS) was carried out by Cognisense, an experienced market research company. The research was conducted in compliance with the International Standard ISO 20252:2012
- The VAS collected information on a wide range of areas to help TNI better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