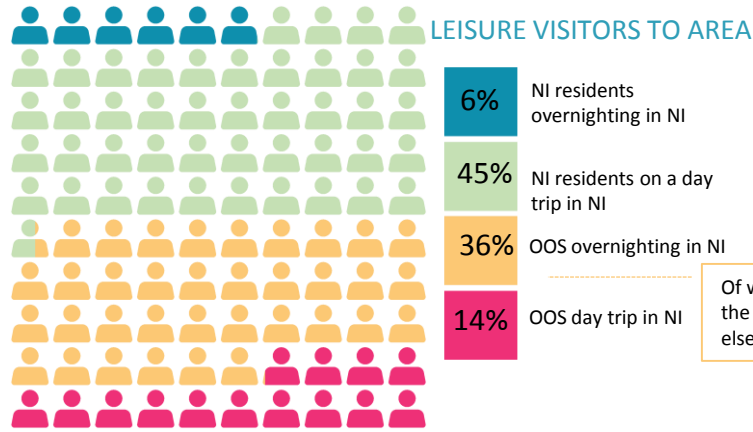


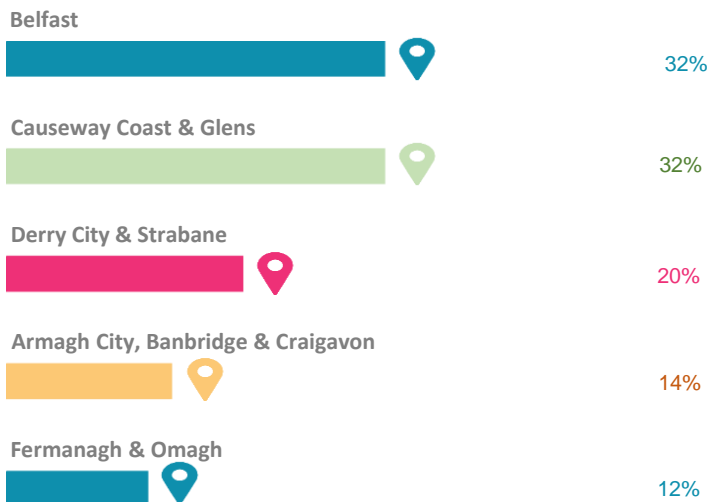
MID ULSTER

TNI's Visitor Attitude Survey (2018)* reports a much higher proportion of leisure visitors from Northern Ireland (NI) to Mid Ulster compared with many other areas, particularly NI day trippers. Great Britain is the area's largest out of state (OOS) source market, followed by North America and the Republic of Ireland.

Visitors to Mid Ulster are more likely to be visiting to see a particular attraction, with historic monuments/sites and forest parks/gardens especially popular.

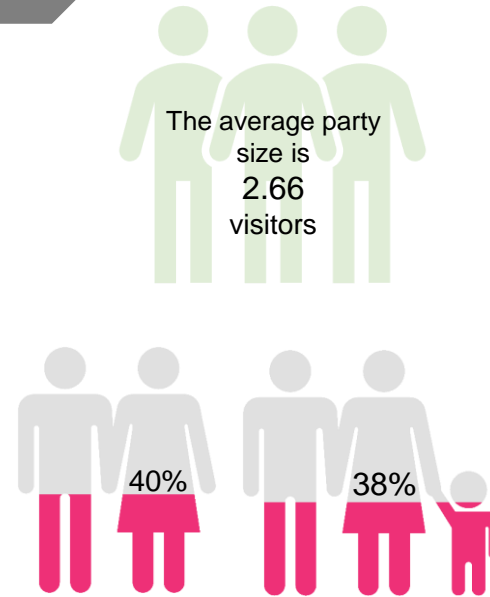


TOP 5 OTHER AREAS VISITED



PARTY TYPE

40% of visitors travelled as a couple, whilst **38%** travelled as a family. **13%** travelled as a group of adults, **6%** of visitors travelled alone and **2%** were on a tour.

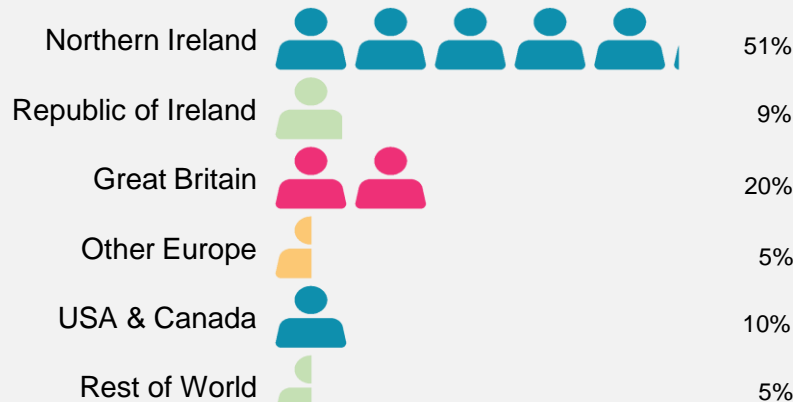


Of which 18% overnighed in the area and 18% overnighed elsewhere in NI

49%

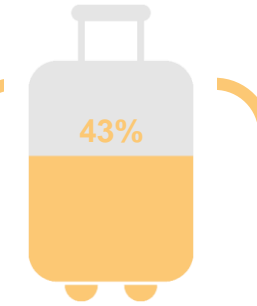
49% of visitors from out of state.

ORIGIN OF THOSE VISITING DESTINATION



AGE

Mid Ulster attracts a largely mature visitor, with less than 1 in 8 visitors aged under 35.



43% of OOS visitors were visiting NI for the first time.



Under 35

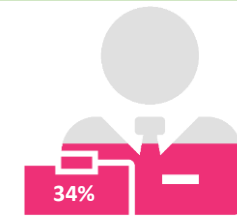


35-55



55+

VISITOR INFORMATION



34%[†] had visited a Visitor Information Centre on their trip to Northern Ireland. 20% had visited a Visitor Information Centre in the area.

47%

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

32%

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=138

PLACES TO EAT

Professional efficient service



8.05

Friendly welcoming staff



8.59

Value for money



7.93

Menus featuring locally sourced ingredients



7.54

Quality of food and drink



7.86

Information on places to eat and drink out



6.83

Places to eat available at the times of day and night that suit you



7.66

Range of restaurants/cafes/coffee shops



7.44

Availability of food to suit dietary requirements – vegetarian/vegan/gluten free



6.56

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 enhance the visitor experience.

Relative to other areas of NI, leisure visitors to Mid Ulster are more likely to be staying with family/friends. Guest houses/B&Bs and self-catering were the most popular types of commercial accommodation used.

Most popular types of places to eat

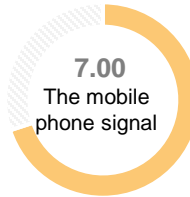


Cafes



Pubs/Bars

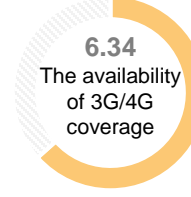
DIGITAL CONNECTIVITY



7.00
The mobile phone signal



6.56
The availability of free Wi-Fi



6.34
The availability of 3G/4G coverage



OVERALL SATISFACTION SCORE

6.63

ACCOMMODATION



19%
Hotel



21%
Self-Catering



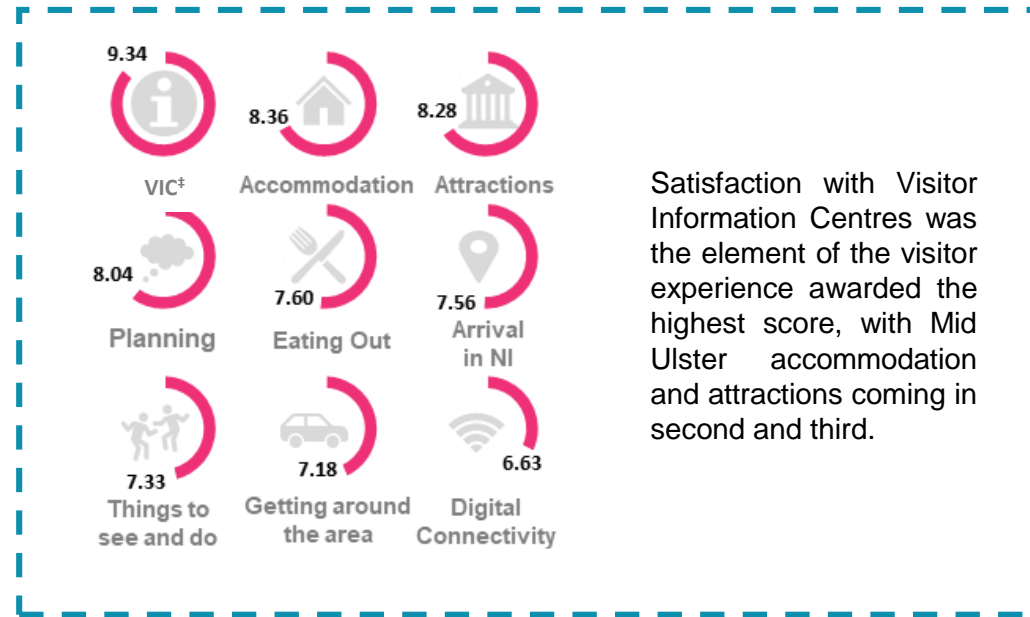
26%
Guest House/B&B



30%
Staying with Family/Friends



4%
Camping/Motorhome



Satisfaction with Visitor Information Centres was the element of the visitor experience awarded the highest score, with Mid Ulster accommodation and attractions coming in second and third.

*Visitor Information Centre



OVERALL SATISFACTION SCORE

7.60

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

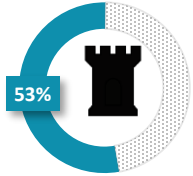
Base: n=138



tourism northernireland

THINGS SEEN AND DONE

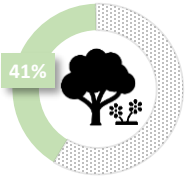
Visited a castle /other historic monument



Visited a museum or art gallery



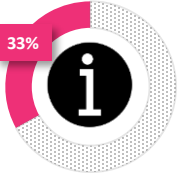
Visited a forest, park or garden



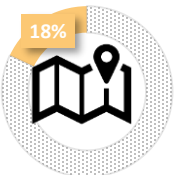
Went shopping



Visited a visitor/interpretation centre



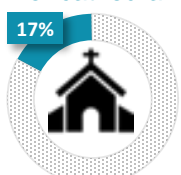
Took a guided tour



Visited a pub



Visited a church or cathedral



ATTRACTIONS VISITED IN THE AREA



41%

The Argory, Dungannon



41%

Seamus Heaney HomePlace



10%

Dungannon Park



8%

Hill of the O'Neill and Ranfurly Arts Centre

The following attractions were each visited by 7% of leisure visitors:

- Springhill House
- Lissan House
- Beaghmore Stone Circle

RATINGS OF ATTRACTIONS IN THE AREA

Friendly staff at the attractions



Professional and efficient staff at attractions



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



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



A range of interesting/enjoyable visitor attractions



8.28

OVERALL SATISFACTION SCORE



RATINGS OF THINGS TO SEE & DO IN THE AREA

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



Somewhere you could meet and mix with the local people



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



The range of outdoor activities



Opportunities to attend local events/festivals



Shopping opportunities



7.33

OVERALL SATISFACTION SCORE



GETTING AROUND THE AREA

A feeling of being welcomed when you arrived in the area



Signs that help you find interesting /key tourist locations



Quality of signposting for roads/directions



Quality of the roads



7.18

OVERALL SATISFACTION SCORE



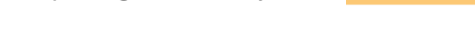
Availability and cost of parking



Car touring routes which point out places along the way



Signposting for exploring the area by foot



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



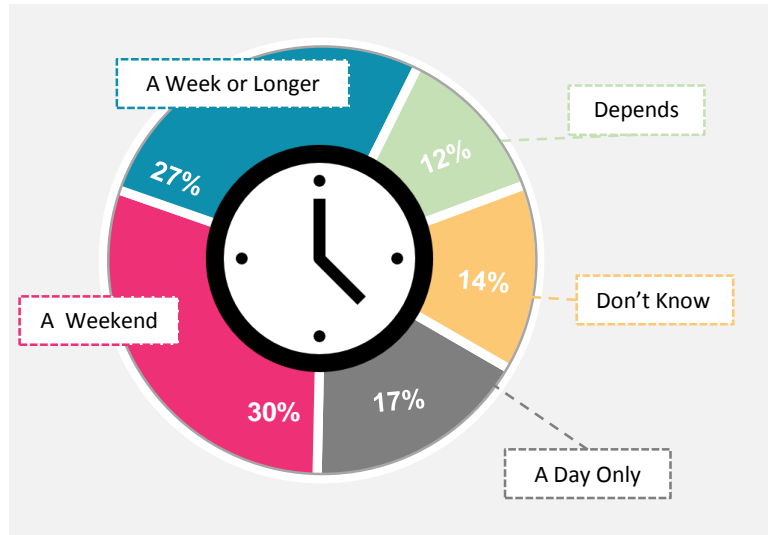
= Significantly lower than the average for all areas

= Significantly higher than the average for all areas

SOURCE: Tourism Northern Ireland: Visitor Attitude Survey 2018, Cognisense Ltd.
Base: n=138

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

7.08

There was enough to do in the evenings

6.63

There was enough to do on Sundays

6.71

7.38

Satisfaction with cleanliness and availability of public toilets

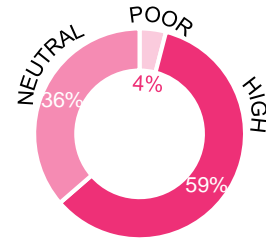
8.05

Satisfaction with cleanliness in the area

8.40

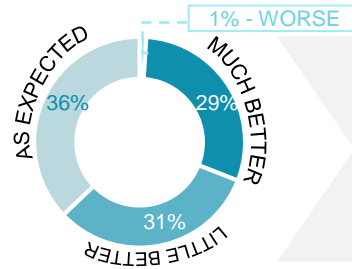
Satisfaction with safety in the area

VISITOR EXPERIENCE



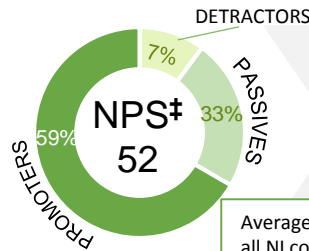
OVERALL EXPERIENCE

59% of leisure visitors would rate their experience in this area as "Excellent". 36% are passive about their experience and only 4% would regard their experience as poor.



EXCEEDING EXPECTATIONS

29% of visitors said the trip to the area was "much better than expected". 67% said it was around the same or slightly better and only 1% said it was "worse than expected".



RECOMMEND AREA TO FAMILY AND FRIENDS

59% of visitors would definitely recommend this area. 33% are fairly likely to recommend the area and 7% would not recommend.

Average NPS for all NI council areas was 58

Visitors to Mid Ulster were almost evenly split as to whether the area would sustain a weekend or a week or longer.

The staff they encountered were among the highlights for leisure visitors to Mid Ulster. Relative to other areas of NI, visitors were more satisfied with the availability and cost of car parking.

Mid Ulster is perceived to lack the same range of interesting things to see and do as many other areas, and signage for exploring the area by foot could improve the visitor experience.

The majority of leisure visitors would recommend the area to family/friends.

BEST EXPERIENCES IN THE AREA

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

Visited a couple of really good historical houses before we attended a friend's wedding in Lurgan. We were warmly welcomed wherever we went including a local pub or two. The country is beautiful, the people super friendly and we are already planning for a return next year.

HomePlace is an outstanding experience. A great day out.

Our local host was the best. He showed us where to go, accompanied us several times, gave us advice about restaurants, shops, locations... He was more like family rather than our host! We found a friend. And your food also surprised us for its quality. We'll go back!

Seamus Heaney HomePlace is a must for anyone interested in exploring the relationship between people and their surroundings.

SOURCE: Tourism Northern Ireland: Visitor Attitude Survey 2018, Cognisense Ltd.
Base: n=138



*(NPS) = Net Promoter Score®

MID ULSTER

		MEASURE	MID ULSTER	NORTHERN IRELAND
PLANNING & BOOKING	8.04	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	8.06	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
ARRIVAL	7.56	Ease of booking transport within Northern Ireland	---	7.19
		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	7.18	Signs that help you find interesting/key tourist locations	7.43	7.69
		Quality of signposting for roads/directions	7.16	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	6.69	7.09
		A feeling of being welcomed when you arrived in the area	8.27	8.08
		Places by the road to stop while driving and view the landscape	6.38	6.74
		Availability and cost of parking	7.86	7.14
Signposting for exploring the area by foot	6.38	7.08		
VISITOR INFORMATION IN THE AREA	9.34	Quality of the roads	6.81	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=138



SIGNIFICANTLY HIGHER THAN THE AVERAGE FOR NI

SIGNIFICANTLY LOWER THAN THE AVERAGE FOR NI

EXPERIENCE OF MID ULSTER

---- = INSUFFICIENT BASE

* = Caution: Limited Base (n=40-59)

		MEASURE	MID ULSTER	NI
DIGITAL CONNECTIVITY	6.63	The mobile phone signal	7.00	7.47
		The availability of free Wi-Fi	6.56	6.97
		The availability of 3G/4G coverage	6.34	6.82
EATING OUT	7.60	Professional, efficient service	8.05	8.22
		Friendly, welcoming staff	8.59	8.54
		Value for money of eateries	7.93	7.73
		Menus featuring locally sourced ingredients	7.54	7.34
		Quality of food and drink	7.86	7.98
		Information on places to eat and drink out	6.83	7.17
		Places to eat available at the times of day and night that suit you	7.66	7.75
		Range of restaurants/cafes/coffee shops	7.44	7.74
		Availability of food to suit dietary requirements – vegetarian/vegan/gluten free	6.56	7.08
		Availability of free Wi-Fi	6.56	7.08
ACCOMMODATION	8.36	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
		Availability of free Wi-Fi	----	8.12
ATTRACTIONS	8.28	Value for money of attractions (historic sites, museums, visitor centres etc.)	8.16	7.95
		Information at visitor attractions in your own language	---	5.80
		A range of interesting/enjoyable visitor attractions	8.12	8.34
		Quality of interpretation and storytelling at museums/visitor centres in area	8.41	8.27
		Professional and efficient staff at attractions	8.84	8.56
THINGS TO DO AND SEE	7.33	Friendly staff at the attractions	9.07	8.80
		Unique things to do and see that reflect the area's local culture	8.05	8.12
		The range of outdoor activities	7.35	7.80
		Opportunities to attend local events/festivals	7.10	6.91
		Range of interesting/enjoyable things to see/do in the area	7.49	8.20
Shopping opportunities	6.35	7.16		
Somewhere you could meet and mix with the local people	7.66	7.59		

		MEASURE	MID ULSTER	NI
EXPERIENCE		Cities, towns & villages	*8.15	8.15
		Activities	*7.50	7.83
		Beautiful scenery/landscapes	*8.58	8.90
		Friendly local people	*8.46	8.47
		Rich history and culture of area/NI	*8.70	8.61
		Ability to trace ancestral links	*6.90	6.05
		Availability of special offers e.g. Groupon deal/good deal on accommodation	*5.21	5.58
		Screen tourism	*7.05	7.14
		Overall experience during this visit, based on the time you spent in area	8.70	8.77
		ENOUGH TO DO		There was enough to do in all weather conditions
There was enough to do in the evenings	6.63			7.16
There was enough to do on Sundays	6.71			6.90
CLEANLINESS/ SAFETY		Cleanliness and availability of public toilets	7.38	7.21
		Cleanliness of area/litter free	8.05	7.93
		Cleanliness of the beaches	----	8.41
		Sense of safety and security while walking around the area	8.40	8.43

Visitors appreciated Mid Ulster's scenic landscapes, although they scored below the NI average. Enriching the breadth of the tourism offering in the area and widening the evening economy would enhance the experience and could attract a greater proportion of OOS visitors.

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=138

INTERPRETING TNI'S 2018 VISITOR ATTITUDE SURVEY



SURVEY BACKGROUND & RATING SCALE

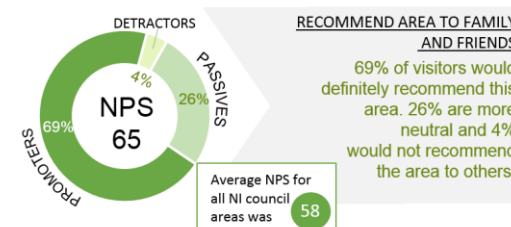
- Tourism Northern Ireland's (TNI) 2018 Visitor Attitude Survey (VAS) was carried out by Cognisense, an experienced market research company. The research was conducted in compliance with the International Standard ISO 20252:2012
- The VAS collected information on a wide range of areas to help TNI better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