

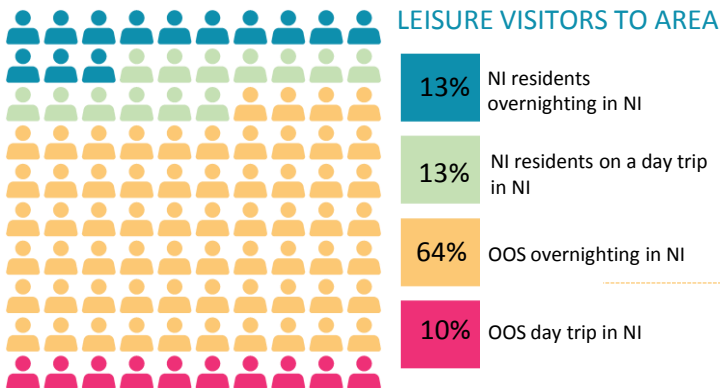
NEWRY, MOURNE & DOWN

PARTY TYPE

AGE

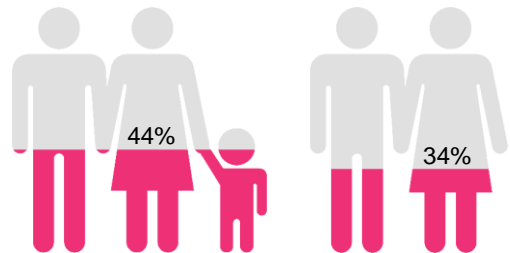
TNI's Visitor Attitude Survey (2018)* reports a higher proportion of out of state (OOS) overnight visitors to this area compared with most other areas of Northern Ireland (NI), with Great Britain and North America the two largest OOS source markets. Republic of Ireland (ROI) visitors accounted for almost 1 in 10 of all leisure visitors.

Enjoying the scenery/landscapes was a key motivating factor for visiting Newry, Mourne & Down. Leisure visitors to this area were more likely to participate in outdoor activities, such as hiking and cycling/mountain biking, relative to other areas of NI.

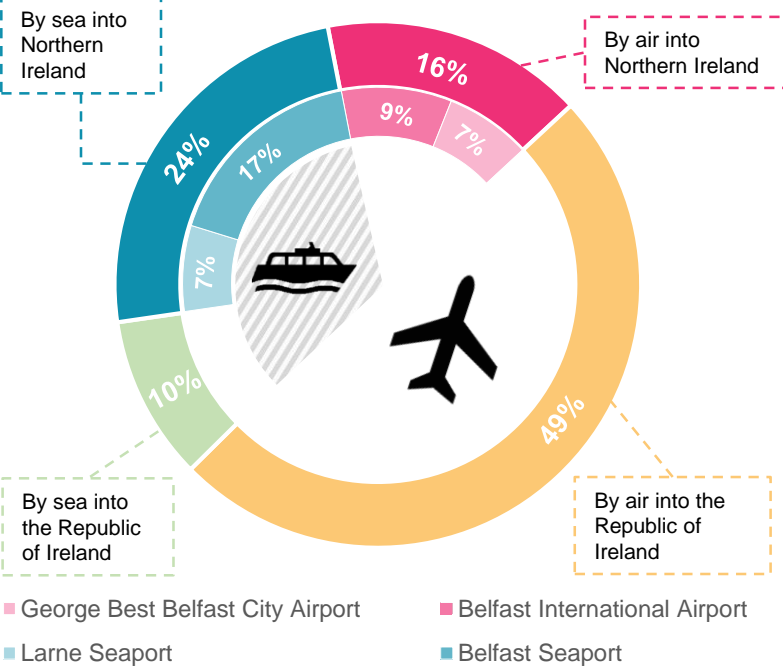


Most of the visitors (44%) travelled as a family, whilst 34% of visitors travelled as a couple. 12% travelled as a group of adults, 7% of visitors travelled alone, and 4% were on a tour.

The average party size is **3.28** visitors

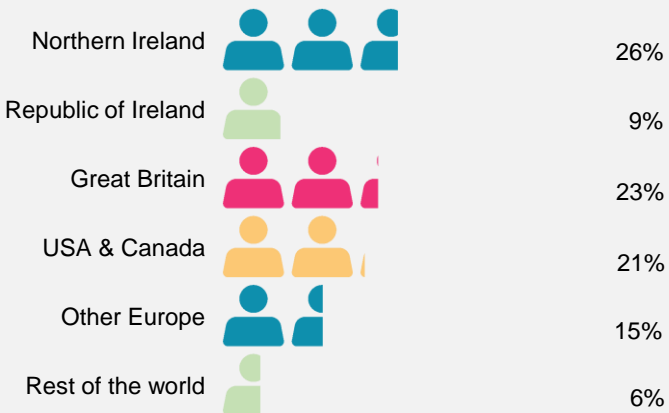


MEANS OF TRANSPORT INTO THE ISLAND OF IRELAND



74% of visitors from out of state.

ORIGIN OF THOSE VISITING DESTINATION



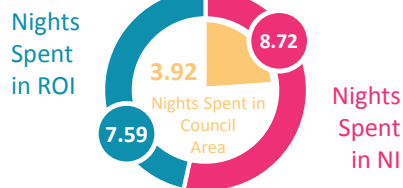
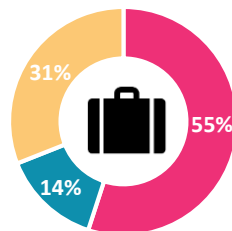
VISITING THE REPUBLIC OF IRELAND

Of which 40% overnighed in the area and 24% overnighed elsewhere in NI

83% of OOS visitors decided to visit Newry, Mourne & Down before arriving in NI.

56% 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



69% of those from outside NI/ROI who visited this area also visited the ROI.

*SOURCE: Tourism Northern Ireland: Visitor Attitude Survey 2018, Cognisense Ltd. Total Base: n=151

AREAS AND ATTRACTIONS ALSO VISITED IN NI

Attractions that influenced leisure visitors to come to Northern Ireland



44%
Belfast City



19%
Titanic Belfast



37%
Giant's Causeway



15%
Derry-Londonderry

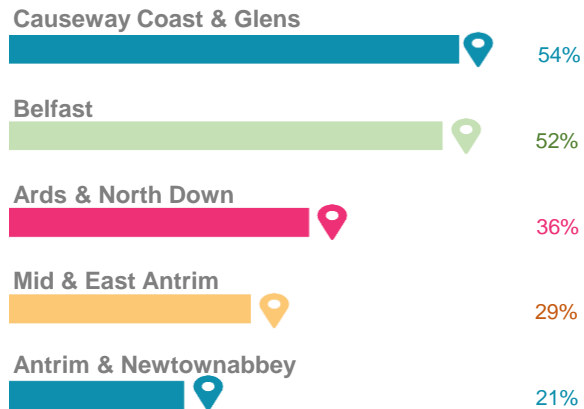


26%
Causeway Coastal Route



7%
Game of Thrones locations

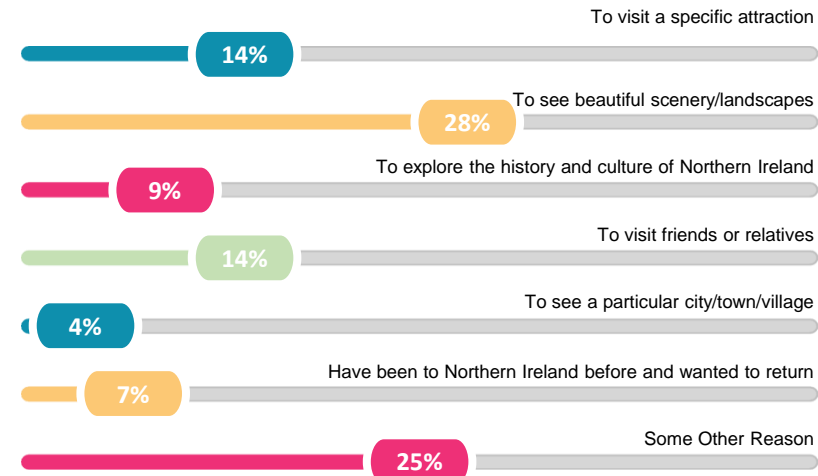
TOP 5 OTHER AREAS VISITED



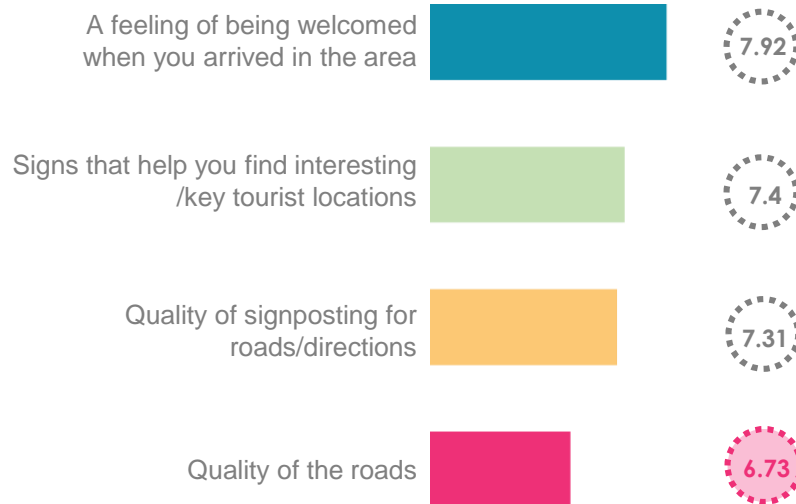
MOST IMPORTANT REASON FOR VISITING THE AREA

The main reason for visiting Newry, Mourne & Down was "To see beautiful scenery/landscapes" (28%).

These visitors are less motivated to visit a specific attraction and less oriented towards exploring history and culture, relative to other areas of NI. Visitors to Newry, Mourne & Down are slightly more interested in participating in a particular activity and attending events compared with other areas.

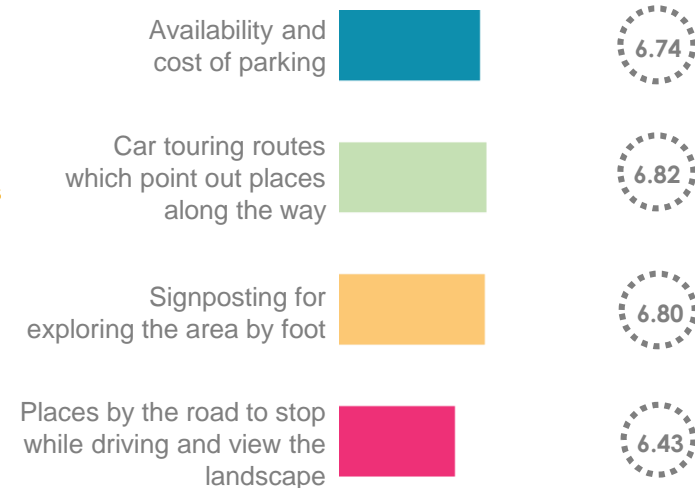


GETTING AROUND THE AREA



Given the importance of enjoying the scenic landscape, the quality of the roads, availability of car touring routes and roadside viewing bays are areas that could be improved.

(Average score on scale from 0-10)



7.14
OVERALL SATISFACTION SCORE

= Significantly lower than the average for all areas

= Significantly higher than the average for all areas

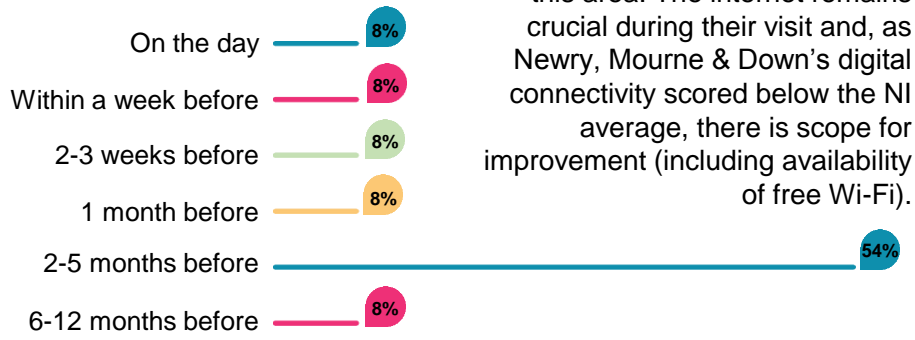
SOURCE: Tourism Northern Ireland: Visitor Attitude Survey 2018, Cognisense Ltd.

Base: n=151

PLANNING & INFORMATION

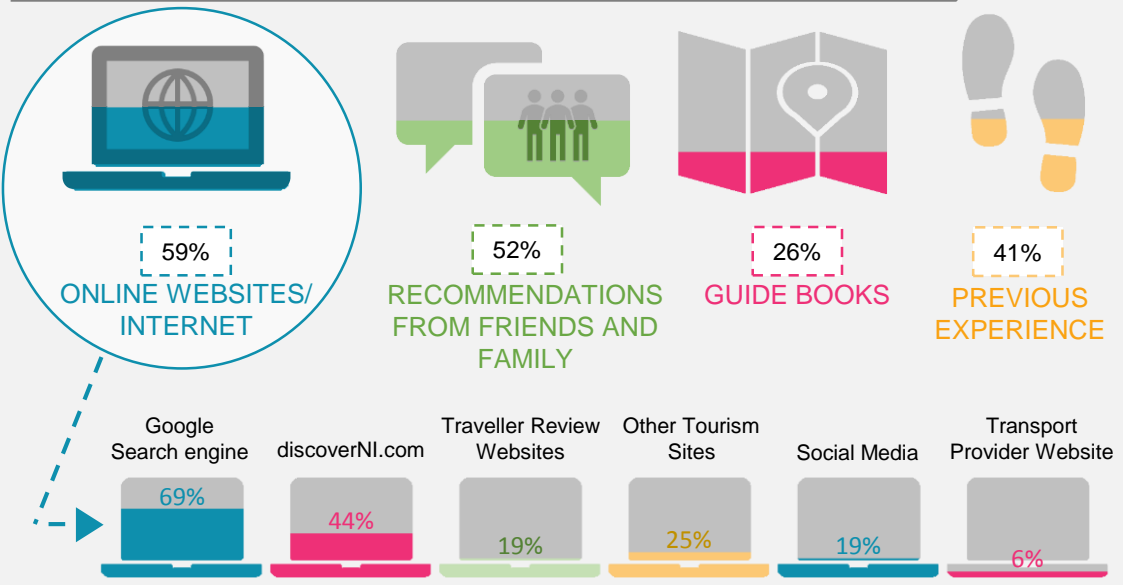
PLANNING TIMESCALE FOR NI

OOS visitors began booking and planning their trip...

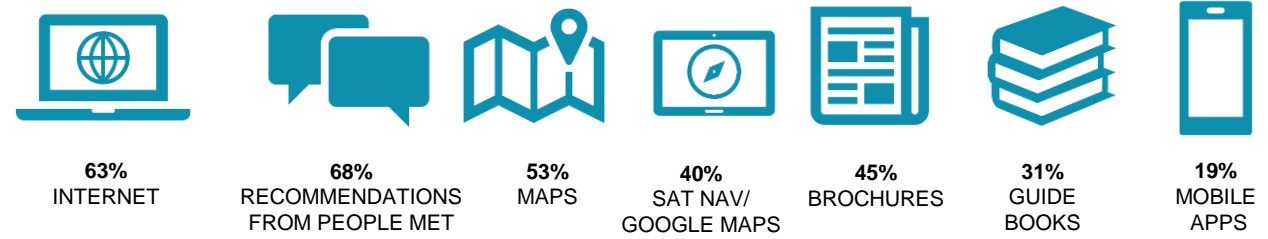


Online sources dominate pre-trip planning, however the importance of advocacy and previous experience is particularly evident for OOS leisure visitors to this area. The internet remains crucial during their visit and, as Newry, Mourne & Down's digital connectivity scored below the NI average, there is scope for improvement (including availability of free Wi-Fi).

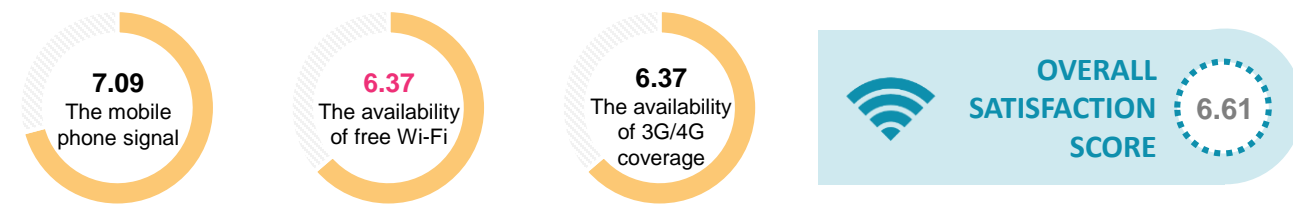
PRE-TRIP PLANNING RESOURCES



INFORMATION RESOURCES USED WHILST IN NI



DIGITAL CONNECTIVITY

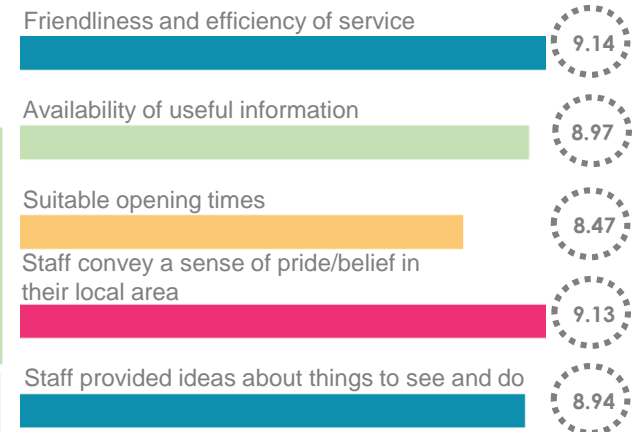


VISITOR INFORMATION CENTRES

64% had visited a Visitor Information Centre on their trip to Northern Ireland. 59% had visited a Visitor Information Centre in the area.

36% received information which encouraged them to visit other areas in Northern Ireland they had not planned to visit.

22% received information which encouraged them to stay longer in the area.



8.93 OVERALL SATISFACTION SCORE

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

Base: n=151

*A proportion of emails were collected at Visitor Information Centres

ACCOMMODATION



27%
Hotel

The majority of overnight leisure visitors to Newry, Mourne & Down stayed in commercial accommodation. They were more likely than visitors to other areas to be camping and caravanning.



20%
Self-Catering

The welcoming staff/host were a highlight of the accommodation experience. The availability of free WI-FI at lodgings was less positively rated.



23%
Guest House/
B&B

21% of all guest houses, B&Bs and self-catering accommodation was booked through Airbnb



7%
Camping/Static
Caravan

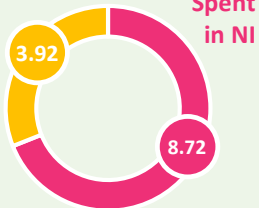


12%
Motorhome/
Touring
Caravan



16%
Staying with
Family/Friends

Nights Spent in Council Area



PLACES TO EAT

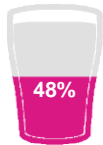


OVERALL SATISFACTION SCORE

7.47

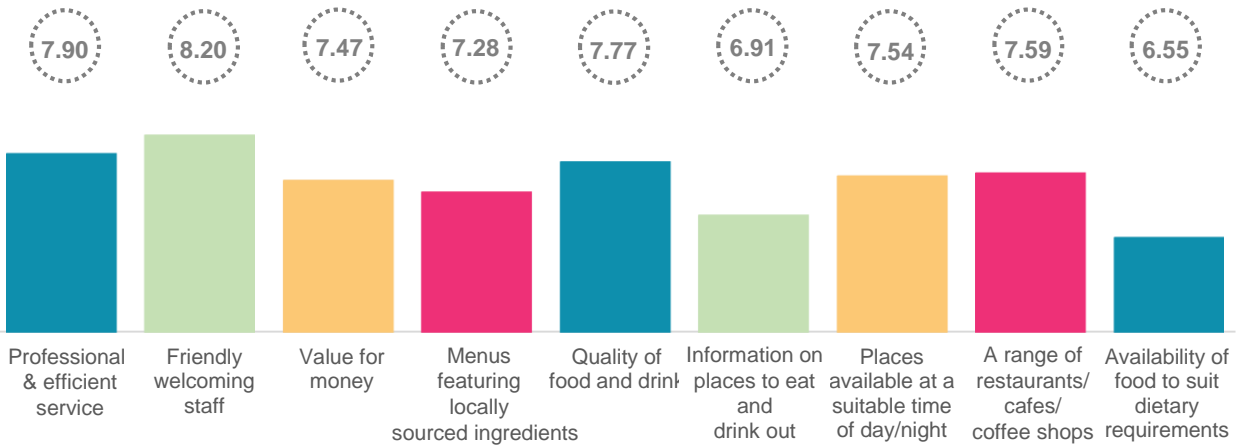


Cafes



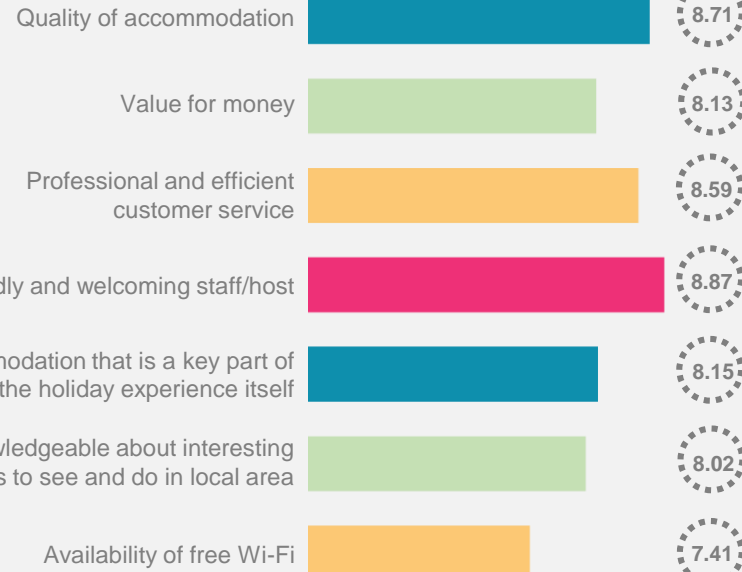
Pubs / Bars

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"



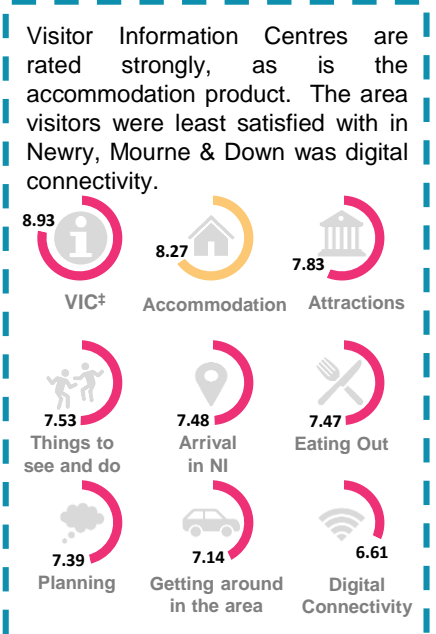
8.27

OVERALL SATISFACTION SCORE

94% of visitors with children said that the places to eat are "family friendly for children of all ages".

97% of visitors said that the quality of the accommodation they stayed in exceeded or met their expectations. For 14% expectations were greatly exceeded.

95% of visitors agreed that they were able to stay in their preferred type of accommodation. Only 1% were not.



SOURCE: Tourism Northern Ireland: Visitor Attitude Survey 2018, Cognisense Ltd.
Base: n=151

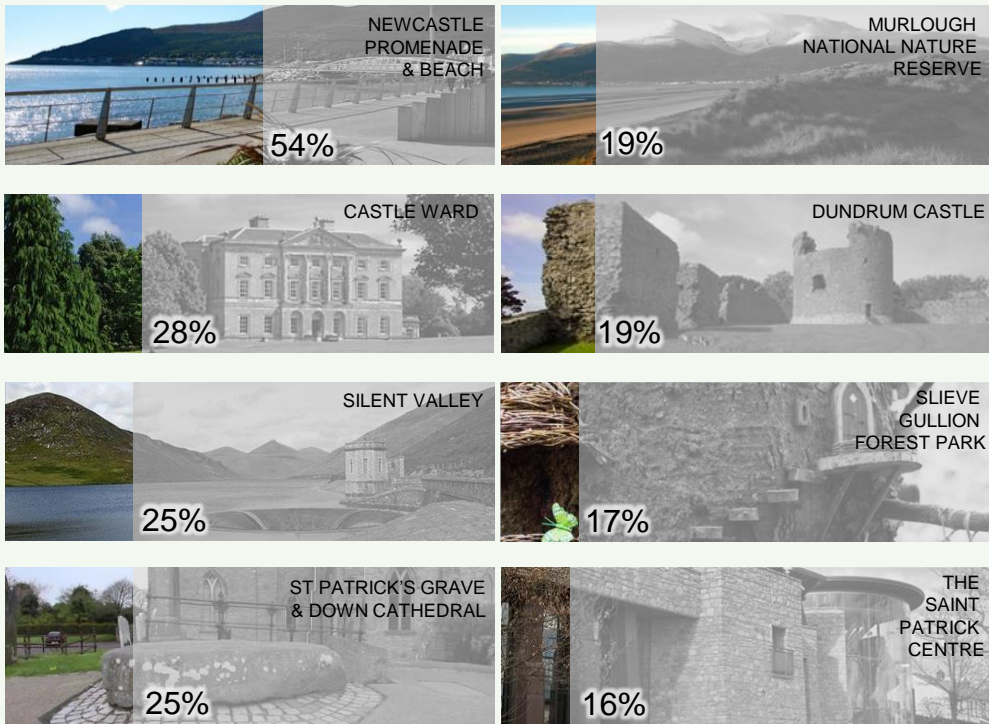
ATTRACTIONS & ACTIVITIES

Leisure visitors to Newry Mourne & Down are more likely to have visited Newcastle. They are also more likely than visitors to other areas to be involved in outdoor activities such as hiking, visiting a forest/garden and a beach. Whilst historic properties (Castle Ward) and Christian heritage sites also feature, the range of 'interesting' visitor attractions scored lower than many other areas. Relative to other NI areas, cleanliness is also an aspect that scored poorly.

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



7.83

OVERALL SATISFACTION SCORE



RATINGS OF THINGS TO SEE & DO IN THE AREA



OVERALL SATISFACTION SCORE

7.53



7.38
Satisfaction with cleanliness in the area

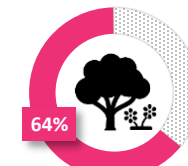
6.71
Cleanliness and availability of public toilets in the area

8.42
Satisfaction with safety in the area

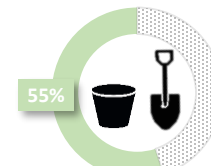
SOURCE: Tourism Northern Ireland: Visitor Attitude Survey 2018, Cognisense Ltd.
Base: n=151

THINGS SEEN AND DONE

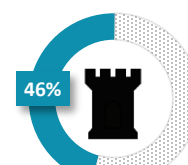
Visited a forest, park or garden



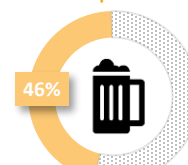
Visited a beach



Visited a castle /other historic monument



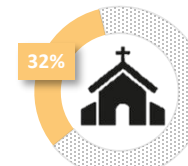
Visited a pub



Went shopping



Visited a cathedral or church



Visited a museum or art gallery



Attended an event or festival



82% of visitors with children said that the things to do and see in the area are "family friendly for children of all ages".



BEST EXPERIENCES IN THE AREA

Seeing the stunning landscape of the Mourne Mountains; I have always wanted to see them and they are truly beautiful.

Walking through the Silent Valley area was beautiful. We also stopped in a town by the sea and experienced the beach and cafes. The journey from Belfast by road was via the coastal route and it was wonderful. It's a pity more people from England do not experience the warmth of the NI people and the beauty of the countryside...

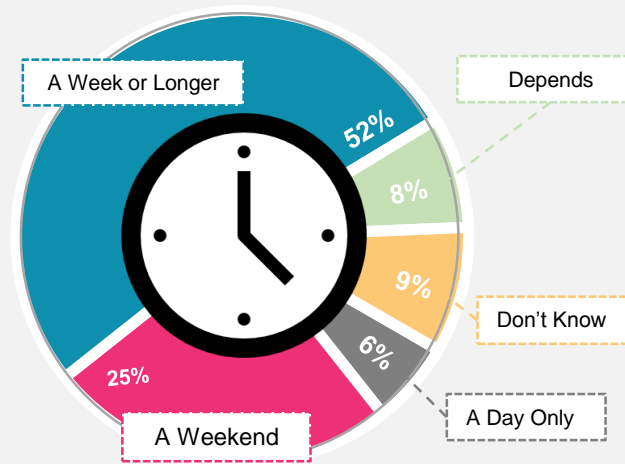
Overall we were highly pleased. NI was surprisingly lively, the people were open, friendly and always willing to help.

The natural beauty and quality of mountain bike trails make me want to return.

Climbing Slieve Donard was amazing; it only took me 4.5 hours to climb the highest peak in Northern Ireland which would never happen in Canadian Rocky Mountains. Along my hike, I met and chatted with more local people than I had my entire time in Ireland. Everyone was so friendly and had advice and stories to tell me. I would love to come back and climb some of the other mountains in that range.

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

7.05

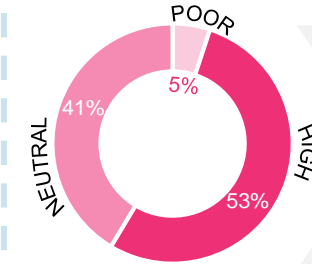
There was enough to do in the evenings

6.67

There was enough to do on Sundays

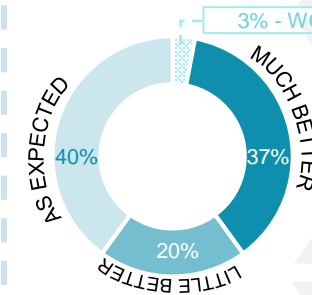
6.99

DESTINATION EXPERIENCE



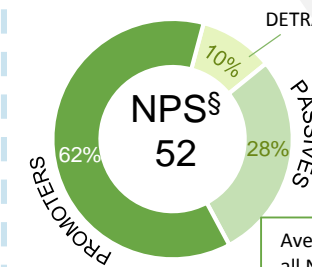
OVERALL EXPERIENCE

53% of visitors rate their experience in this area highly. 41% are more neutral about their experience and only 5% would regard their experience in the area as poor.



EXCEEDING EXPECTATIONS

37% 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 3% said it was "worse than expected".



RECOMMEND AREA TO FAMILY AND FRIENDS

62% of visitors would definitely recommend this area. 28% are more neutral and 10% would not recommend the area.

Average NPS for all NI council areas was 58

Compared with the rest of NI, leisure visitors are more persuaded that Newry, Mourne & Down warranted a week's stay, but less convinced that it offered enough for all weather conditions or in the evening. Overall, visitors enjoyed their experience of Newry, Mourne & Down and it exceeded expectations for almost three fifths of visitors.

§(NPS) = Net Promoter Score®

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

Base: n=151

NEWRY, MOURNE & DOWN

	MEASURE	NEWRY, MOURNE & DOWN	NORTHERN IRELAND	
PLANNING & BOOKING	7.39	The availability of useful information to help you to plan your trip	7.51	8.14
		The availability/ease of finding information about the different regions within Northern Ireland	---	8.11
		Ease of finding information on the area	7.74	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	6.44	7.75
		Ease of booking accommodation online	---	8.49
		Ease of booking transport within Northern Ireland	5.76	7.19
ARRIVAL	7.48	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	7.14	Signs that help you find interesting/key tourist locations	7.40	7.69
		Quality of signposting for roads/directions	7.31	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	6.82	7.09
		A feeling of being welcomed when you arrived in the area	7.92	8.08
		Places by the road to stop while driving and view the landscape	6.43	6.74
		Availability and cost of parking	6.74	7.14
		Signposting for exploring the area by foot	6.80	7.08
Quality of the roads	6.73	7.15		
VISITOR INFORMATION	8.93	Friendliness and efficiency of service	9.14	9.08
		Availability of useful information	8.97	8.95
		Suitable opening times	8.47	8.66
		Staff convey a sense of pride/belief in their local area	9.13	8.93
		Staff provided ideas about things to see and do	8.94	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=151



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

EXPERIENCE OF NEWRY, MOURNE & DOWN

---- = INSUFFICIENT BASE

		MEASURE	NEWRY, MOURNE & DOWN	NI
DIGITAL CONNECTIVITY	6.61	The mobile phone signal	7.09	7.47
		The availability of free Wi-Fi	6.37	6.97
		The availability of 3G/4G coverage	6.37	6.82
EATING OUT	7.47	Professional, efficient service	7.90	8.22
		Friendly, welcoming staff	8.20	8.54
		Value for money of eateries	7.47	7.73
		Menus featuring locally sourced ingredients	7.28	7.34
		Quality of food and drink	7.77	7.98
		Information on places to eat and drink out	6.91	7.17
		Places to eat available at the times of day and night that suit you	7.54	7.75
		Range of restaurants/cafes/coffee shops	7.59	7.74
		Availability of food to suit dietary requirements – vegetarian/vegan/gluten free	6.55	7.08
ACCOMMODATION	8.27	Quality of accommodation	8.71	8.46
		Value for money of accommodation	8.13	8.22
		Professional and efficient customer service	8.59	8.57
		Friendly and welcoming staff/host	---	8.87
		Accommodation that is a key part of the holiday experience itself	8.15	8.12
		Staff knowledgeable about interesting things to see and do in local area	8.02	8.07
ATTRactions	7.83	Availability of free Wi-Fi	7.41	8.12
		Value for money of attractions (historic sites, museums, visitor centres etc.)	7.44	7.95
		Information at visitor attractions in your own language	---	5.80
		A range of interesting/enjoyable visitor attractions	7.98	8.34
		Quality of interpretation and storytelling at museums/visitor centres in area	7.64	8.27
THINGS TO SEE AND DO	7.53	Professional and efficient staff at attractions	8.08	8.56
		Friendly staff at the attractions	8.44	8.80
		Unique things to do and see that reflect the area's local culture	7.75	8.12
		The range of outdoor activities	8.11	7.80
		Opportunities to attend local events/festivals	7.03	6.91
		Range of interesting/enjoyable things to see/do in the area	8.04	8.20
Shopping opportunities	6.81	7.16		
Somewhere you could meet and mix with the local people	7.45	7.59		

		MEASURE	NEWRY, MOURNE & DOWN	NI
EXPERIENCE		Cities, towns & villages	8.05	8.15
		Activities	7.92	7.83
		Beautiful scenery/landscapes	8.94	8.90
		Friendly local people	8.27	8.47
		Rich history and culture of area/NI	8.52	8.61
		Ability to trace ancestral links	6.00	6.05
		Availability of special offers e.g. Groupon deal/good deal on accommodation	5.47	5.58
		Screen tourism	6.72	7.14
		Overall experience during this visit, based on the time you spent in area	8.63	8.77
		ENOUGH TO DO		There was enough to do in all weather conditions
There was enough to do in the evenings	6.67			7.16
There was enough to do on Sundays	6.99			6.90
CLEANLINESS/SAFETY		Cleanliness and availability of public toilets	6.71	7.21
		Cleanliness of area/litter free	7.38	7.93
		Cleanliness of the beaches	7.66	8.41
		Sense of safety and security while walking around the area	8.42	8.43

Newry, Mourne & Down attracts visitors with more active outdoors interests. Over half of leisure visitors thought there was enough to do in the area for a week or longer, the highest for all the areas.

Ensuring visitors know where to eat out and highlighting the local food provenance in menus would improve the food and drink experience.

Given the importance of the landscape for many visitors to this area, the cleanliness of the local environment warrants attention. Digital connectivity could be enhanced. Broadening the tourism product to ensure there is enough to do in all weather conditions and in the evenings/Sundays would also help enhance the visitor experience.

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=151

INTERPRETING TNI'S 2018 VISITOR ATTITUDE SURVEY

SURVEY BACKGROUND & RATING SCALE

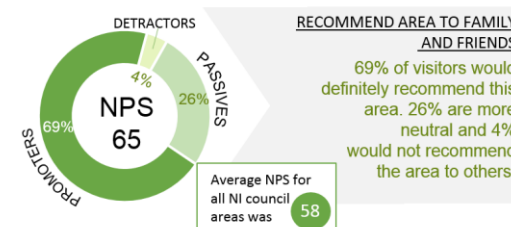
- Tourism Northern Ireland's (TNI) 2018 Visitor Attitude Survey (VAS) was carried out by Cognisense, an experienced market research company. The research was conducted in compliance with the International Standard ISO 20252:2012
- The VAS collected information on a wide range of areas to help TNI better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