

Northern Ireland Tourist Board Visitor Attitude Survey 2013

Experiential Tourism



Overview



Introduction: focus of the 2013 survey

- 1. In the 2013 Visitor Attitude Survey we continued to ask about our visitors' views on NI's tourism products and services to help us understand their needs and monitor how NI is delivering on them**
 - Many aspects of the NI visitor experience are improving. The genuine welcome and friendly, informative staff remain key strengths but we need to continue to work on delivering a better and more joined up experience across NI**

- 2. For the first time ever we also asked about the global phenomenon that is 'experiential tourism.' Firstly, we set about explaining it to our visitors using the following description**

We asked how appealing our visitors found these type of memorable experiences and, if they had had any such experiences during their trip in NI, to tell us about them in their own words. This has allowed us to understand how we are currently delivering on experiential tourism

Experiences that allow you to become really involved in the place you are visiting by bringing to life surroundings, heritage, culture and history. They differ from just a passing tourism experience as they will make you feel connected and engaged with Northern Ireland in a memorable, emotional way, to make you feel that you have really 'experienced' Northern Ireland

- 3. We presented a number of activities and NITB experience themes (e.g. eating out, coasts & lakes, unique outdoors, living legends). To gauge the levels of engagement that visitors want we asked how immersed they would like to get in each activity/theme**

Summary: NI Experiential tourism

1. Visitors to NI find the **concept of experiential tourism appealing** – they are interested in tourism offerings/experiences that bring to life our culture and history and make them feel they have really connected with NI
2. The **theme around which a more immersive experience most appealed was coasts and lakes**. Almost half of visitors to NI preferred to follow a planned route, taking in coastal towns and villages and experiencing local activities and hospitality (compared with less than one fifth who simply wanted to catch a glimpse of the scenery from their vehicle). Visitors were also keen to get immersed in NI's history and heritage. Eating out was the area where visitors were least likely to find a fully immersive experience appealing
3. **Over 80% of those interviewed had one or more experiential or 'memorable moment' during their time in NI**. These varied from large global experiences at Titanic Belfast and the Giant's Causeway to a cluster of activities/events enjoyed in Derry~Londonderry during the UK City of Culture, a fantastic offering at local attractions or beautiful landscapes and memorable encounters with locals. While they varied from fleeting experiences to fully involved day long activities, nearly half felt their memorable experience played a central role in their trip
4. **Encounters with locals and staff were integral to many of the memorable experiences visitors had in NI**. The friendly, genuine welcome that visitors received from locals and staff, their pride in NI and desire to go the 'extra mile' for visitors were very powerful in forming positive, lasting impressions. They also formed a unique and useful way of introducing visitors to 'hidden gems' and other elements of NI that visitors may not have expected or uncovered
5. **Stories that brought NI to life and gave a real sense of the culture as well as beautiful landscapes and activities with a 'wow' factor were all key in delivering memorable experiences**

Summary: the benefits of experiential tourism

1. **The importance of delivering memorable experiences is clear.** Those visitors who had a memorable experience while in NI were more likely to:

- Score their overall NI experience significantly higher
- Recommend NI to friends/relatives
- Rate NI more highly than competitor destinations

2. **Visitors also like to tell others about their memorable experiences**

- Almost 90% of those who had a memorable experience in NI had told their family/friends/colleagues about it
- 60% had already recommended the experience with a further two fifths very/quite likely to do so
- Nearly a third of visitors had already shared their experiences on social media forums, with a further quarter likely to do so

Visitor Attitudes



Survey Objectives

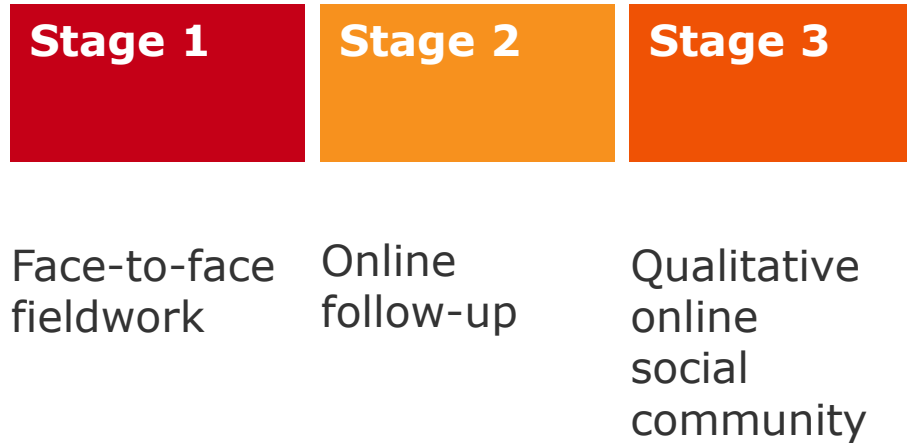
NITB commissions an annual visitor survey asking visitors and domestic holidaymakers about trips taken in Northern Ireland.

To help understand visitors' needs and how NI is currently delivering the 2013 survey comprised 2 key objectives:

- 1. To gather visitors' views on Northern Ireland's tourism products and services from all aspects of the 'consumer journey'**
- 2. To provide an assessment of visitors' desired level of immersion in their holiday experiences and gather examples of visitors' most memorable aspects of their NI trip**

How the survey was conducted

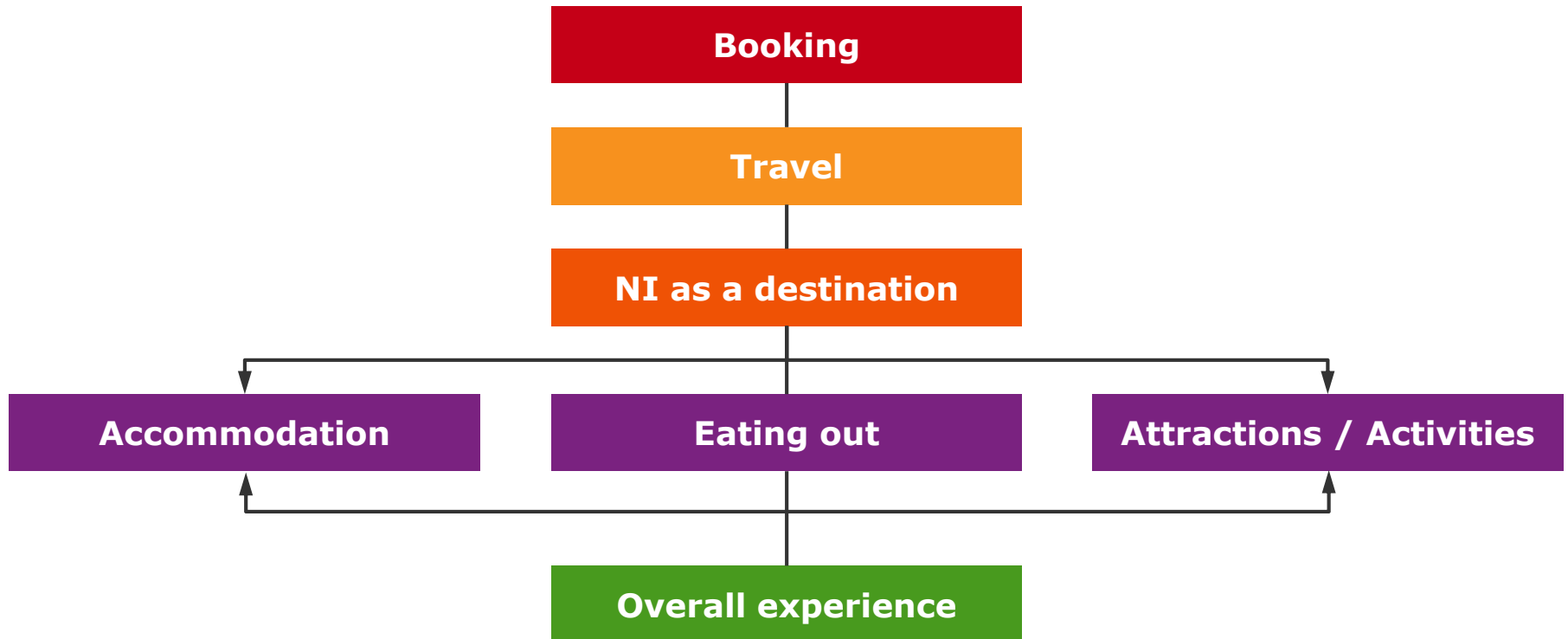
Three stages of research:



- **The 2013 focus was at a NI level - on alternate years these Visitor Attitude Surveys have a regional focus**
- **2013 findings are more comparable with 2009 findings (2011 Survey had a regional focus)**

The Northern Ireland visitor experience

Visitors were asked to provide details of their most recent overnight trip in Northern Ireland. The following sections provide details of this 'visitor journey' including an evaluation of the strengths and weaknesses of the visitor experience identified for each stage as follows:



Booking / Planning – perceptions of increased costs to travel to NI represents a risk

- Ratings for useful information and finding suitable accommodation have remained fairly steady.
- Availability of routes has improved slightly
- Cost of travel to destination ratings have fallen notably however – largely driven by European visitors who were the most likely to rate the cost to travel to Northern Ireland as being only fair or poor. Perhaps reflects the competitive low-cost travel market within Europe.

Mean score out of 5	2009	2011	2013
The availability of useful information to help you plan your trip	3.9	3.9	3.9
Ease of finding suitable accommodation	3.9	3.9	3.9
Availability of convenient air and sea routes to reach the destination	3.7	-	3.9
The cost to travel to your destination	3.4	4.0	3.3

TRI*M Performance/Importance grids

Three elements to each grid:

- Levels of performance
- Levels of stated importance
- Impact on experience

Hygienics

A company's performance in this quadrant should be maintained. These attributes are typically the pre-requisites for a sound customer relationship.

Potentials? Savers?

Maintenance is all that is required here as over performance may represent a waste of valuable resources.



The most important quadrant is Motivators

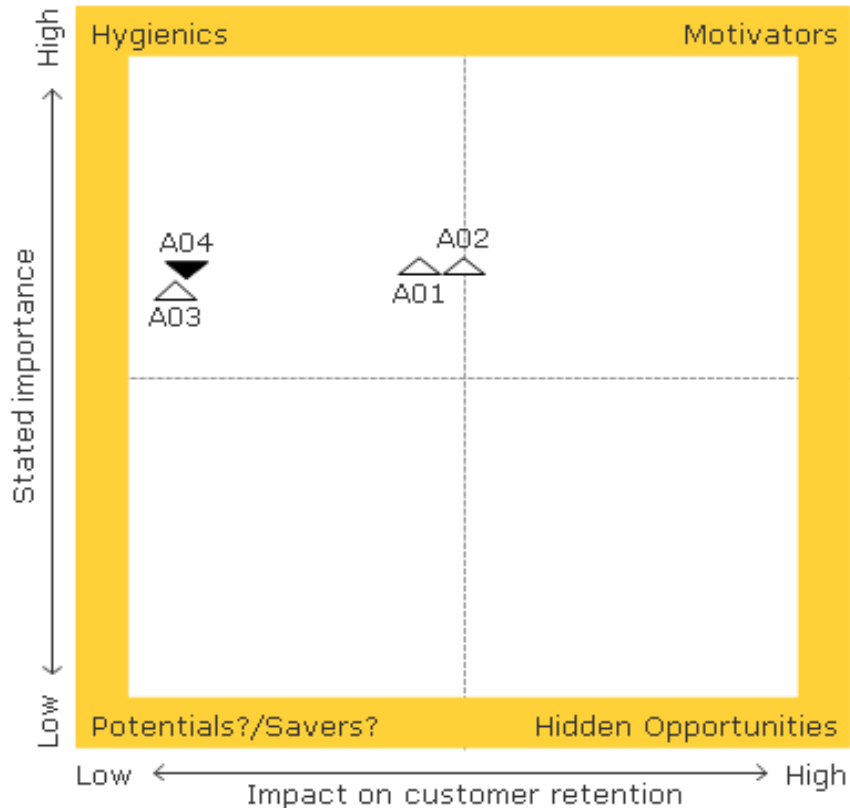
Attributes here are both claimed to be important (stated) and have high impact on the customer experience (driver analysis). Average or below-average performance here is a priority for action.

Hidden Opportunities

Attributes here are claimed to be less important, but have a high impact on relationship strength. These are prime opportunities for a company to gain competitive advantage in the marketplace.

Booking/Planning

Booking attributes remain hygienics – high stated importance but limited impact on overall visitor experience.



- Positive performances for availability of information, ease of finding suitable accommodation and convenient air/sea routes.
- Cost of travel to destination performs significantly below average. Higher dissatisfaction amongst European visitors may reflect higher expectations of cost due the competitive low-cost travel market within Europe.
- Need to promote budget travel options

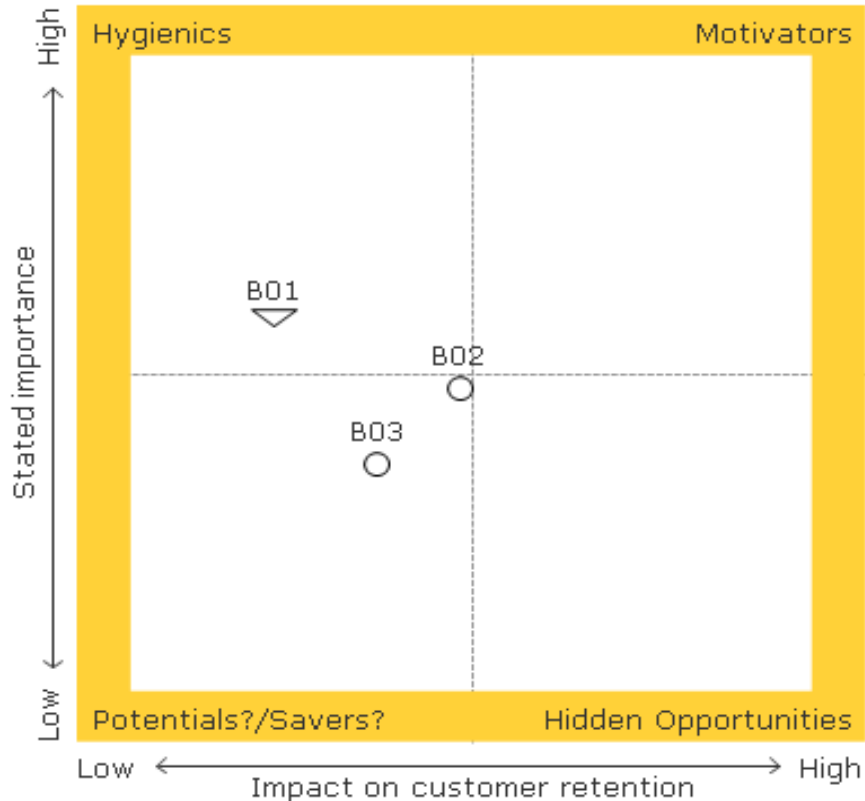
▼ Performance – Far below average ▽ Below average
 ○ Average ▲ Above average ▲ Far above average

Booking

- ▲ A01. The availability of useful information to help you plan your trip
- ▲ A02. Ease of finding suitable accommodation
- ▲ A03. Availability of convenient air and sea routes to reach the destination
- ▼ A04. The cost to travel to your destination

Travel

From the point of view of **those who visited**, travel generally had less impact upon the visitor experience overall – though we know it can be a barrier for non-visitors.



- More than half of overseas visitors arrive via the ROI, most by air, highlighting the importance of travel links from Dublin.
- Availability and pricing of public transport options are areas for improvement, performing below average.
- The car touring routes across Northern Ireland were slightly more positively received and higher than scores recorded in 2009 reflecting investment.

▼ Performance – Far below average ▽ Below average
 ○ Average ▲ Above average ▲ Far above average

- Travel
- ▽ B01. Public transport is available and convenient
 - B02. Having a sense of the place you are visiting when arriving at your destination
 - B03. Car touring routes which point out places to visit along the way

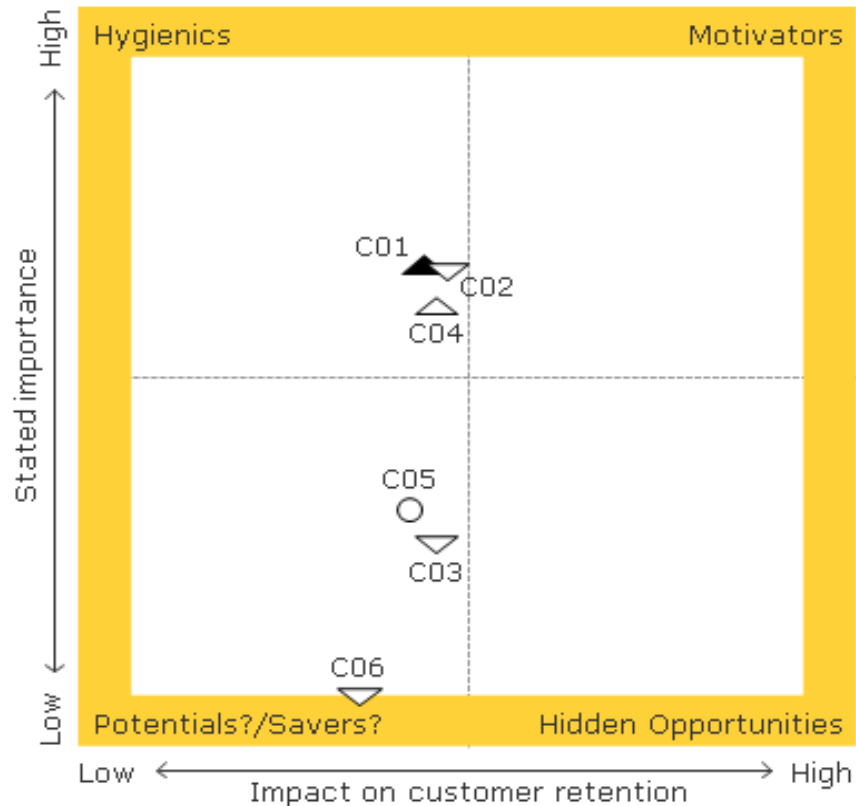
Accommodation – the importance of the staff should not be underestimated

- Attributes relating to staff interactions are the best rated.
- Perceived value for money plays an important role but performing well in this measure has limited ability to change overall visitor experience.
- Interactions with staff can form a lasting memorable experience that will convert into positive word-of-mouth.
- Staff advice and guidance shows signs of improving over the last few years along with friendliness. Generally, positive movements since 2009 with the exception of value for money.

Mean score out of 5	2009	2011	2013
Friendly and informative staff	3.9	4.0	4.1
Efficient customer service	3.7	3.9	3.9
Staff tell you about things to see and do in the local area	-	3.7	3.9
Accommodation that is a key part of the holiday experience itself	3.5	3.8	3.7
Value for money	3.7	3.7	3.6
Accommodation that is distinctive to the destination	3.3	3.6	3.5
That you can use a recognised brand of accommodation (e.g. hotel, company)	3.0	-	3.5

Accommodation

Again, accommodation attributes tended to be 'hygienics', though some metrics had more impact upon the overall TRI*M score than others.



- Interactions with staff had highest ratings and accommodation has greatest impact on the overall visitor experience there are positive encounters with staff and service.
- This can also form a lasting memorable experience that will convert into positive word-of-mouth.
- Value for money plays an important role but improving this measure has limited ability to change overall visitor experience.

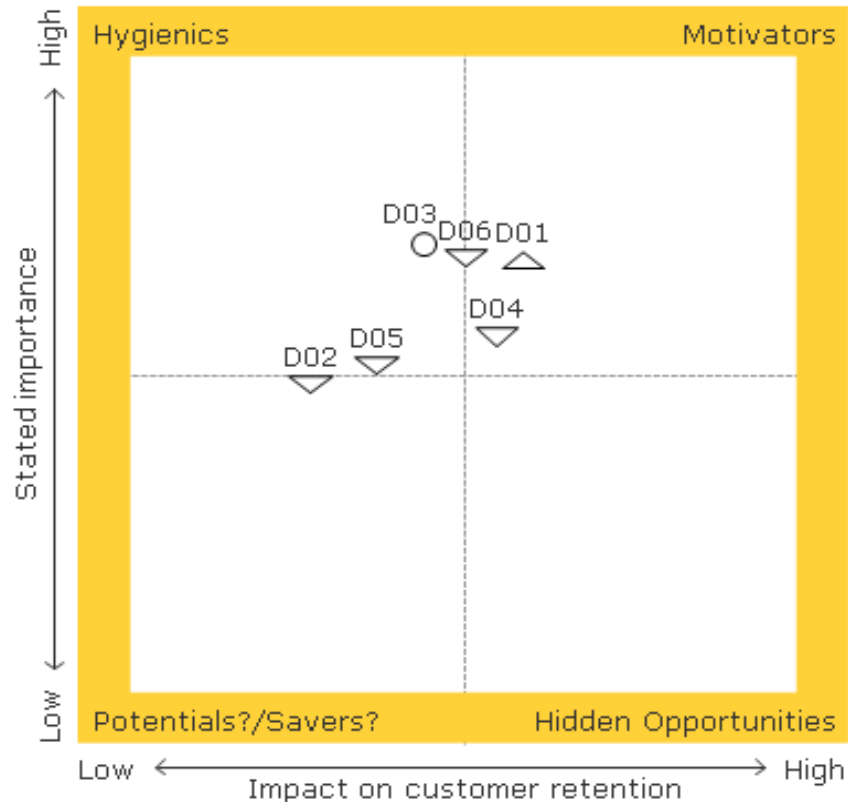
▼ Performance – Far below average ▽ Below average
 ○ Average △ Above average ▲ Far above average

Accommodation

- ▲ C01. Friendly and informative staff
- ▽ C02. Value for money
- ▽ C03. Accommodation that is distinctive to the destination
- △ C04. Efficient customer service
- C05. Accommodation that is a key part of the holiday experience itself
- ▽ C06. That you can use a recognised brand of accommodation (e.g. hotel company)

Eating out

Eating out is generally important to overall perceptions of Northern Ireland but performance is poor – only service is a strength.



- Interactions with local people and staff perform best and have a major impact on the overall experience of visiting NI – they are enhancing the visitor experience.
- Availability of good value for money establishments and information on what’s available are having a negative impact.
- Anecdotal feedback suggests the best experiences had when they received recommendations from locals/staff highlighting the importance of the role of Northern Ireland people in the visitor experience.
- B&Bs were cited frequently for providing positive, memorable experiences

- ▼ Performance – Far below average
- ▽ Below average
- Average
- △ Above average
- ▲ Far above average

Eating out

- ▲ D01. Friendly and efficient service
- ▼ D02. Menus demonstrate the use of locally sourced ingredients
- D03. Opportunities to experience good, local food and drink
- ▼ D04. Information on places to eat and drink out
- ▼ D05. Places to eat available at the times of day and night that suit you
- ▼ D06. Restaurants, cafes and other food outlets that are good value for money

Eating Out – clear improvements in performance – however still below required levels

- There are signs that the experience of eating out in Northern Ireland is improving for visitors
- The importance of the people encountered is echoed again, as the friendliness and efficiency of the service while eating out is the highest rated attribute. Despite having improved, information on where to eat and drink still remains one of the weaker areas.
- Food and drink is a key area where Northern Ireland can promote its culture and enhance the visitor experience, however, ratings for 'menus that demonstrate the use of locally sourced ingredients' were amongst the lowest received for eating out in Northern Ireland.
- In addition to benefitting local business, being able to demonstrate the use of local produce is something that can provide a competitive advantage.

Mean score out of 5	2009	2011	2013
Friendly and efficient service	3.8	3.9	3.9
Opportunities to experience good, local food and drink	3.5	3.6	3.7
Places to eat available at the times of day and night that suit	3.4	3.6	3.6
Restaurants, cafes and other food outlets that are good value for money	3.4	3.4	3.5
Menus demonstrate the use of locally sourced ingredients	3.2	3.4	3.5
Information on places to eat and drink out	3.1	3.3	3.4

Activities undertaken

Historic attractions, castles and houses were most popular among visitors illustrating the potential of the Living Legends experiential pillar. Pubs were enjoyed by three quarters of visitors. Outdoor pursuits such as hiking, walking or visiting gardens were also popular. The diversity reflects the differing needs and interests of priority segments.

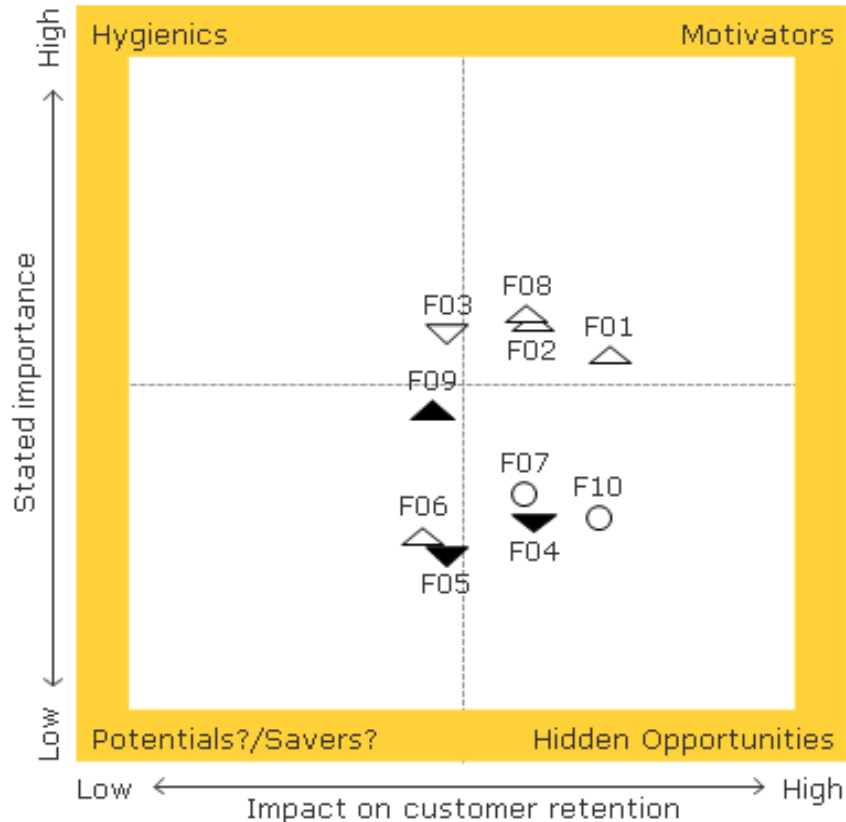


Those from **North America** and **Europe** undertook the greatest number of activities on average (5.4 and 5.0), and more likely to include visits to historic attractions or hiking/walking.

Those from **NI, ROI** and **Europe** were more likely to be heading to a specific event or festival (27%) – they tended to be **slightly younger** than other visitors.

Attractions/Activities

Attractions and activities are of course key to the experience. Some elements are particularly important...



Attractions/activities

- △ F01. Cities, towns and villages that give the destination its own distinctive sense of place
- △ F02. Unique things to do and see that reflect the destination's own local culture
- ▽ F03. Value for money of attractions (historic sites, museums, visitor centres, etc.)
- ▼ F04. Range of things to do in the evenings
- ▼ F05. Range of things to do on Sundays
- △ F06. A range of outdoor activities to do
- F07. Opportunities to attend local events/ festivals
- △ F08. Information to tell you about the places you visit
- ▲ F09. Staff on tours and in attractions tell stories about the local history and places of interest
- F10. The cities/towns you visited had a vibrant feel about them

- ▼ Performance - Far below average
- ▽ Below average
- Average
- △ Above average
- ▲ Far above average

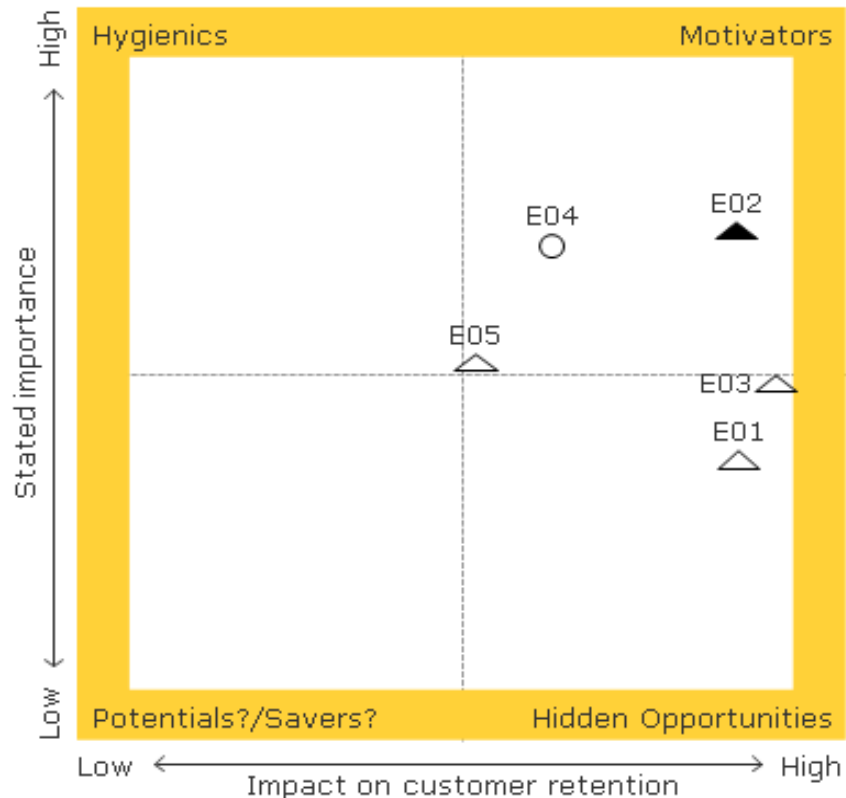
Attractions / Activities – the role of the people in story telling helps generate positive experiences but weekend and evening opening hours continue to frustrate

- Some of the most improved measures relate to being able to connect to the culture, stories and distinctive sense of Northern Ireland through staff, attractions and the places themselves, helping forge memorable experiences that lead to positive impressions and higher likelihood to recommend
- The wide range of opportunities to attend local/events and festivals having also improved reflects the City of Culture and related events in 2013.
- The lowest ratings have consistently been for the range of things to do in the evenings and the range of things to do on Sundays, despite slight improvements in 2013.

Mean score out of 5	2009	2011	2013
Opportunities for sightseeing in the countryside and on the coast	4.2	-	4.3
Staff on tours and in attractions tell stories about local history and places of interest	3.8	3.9	4.1
Visitor attractions which tell the story of the place you're visiting in interesting manner	3.7	3.7	4.0
Cities, towns and villages that give the destination its own distinctive sense of place	3.8	3.7	4.0
Information to tell you about the places you visit	3.8	3.7	4.0
Unique things to do and see that reflect the destination's own local culture	3.8	3.7	3.9
A range of outdoor activities to do	3.6	3.5	3.8
Opportunities to attend local events/ festivals	3.2	3.3	3.6
Value for money of attractions (historic sites, museums, visitor centres, etc.)	3.6	3.6	3.5
Range of things to do in the evenings	3.2	3.2	3.3
Range of things to do on Sundays	3.0	3.0	3.2

Northern Ireland itself

Key brand attributes are delivering for Northern Ireland with the people themselves its best asset



- The top rated attribute 'friendly, genuine welcome' has been improving steadily since 2009. It is central to the whole visitor experience and a key strength for NI.
- Unique and distinctive and stories provide great potential as does somewhere to rest and relax.
- On the other hand there has been a notable decline for 'somewhere you feel safe', which is a key factor for visitors.

▼ Performance – Far below average ▽ Below average
 ○ Average ▲ Above average ▲ Far above average

NI attributes

- ▲ E01. That it is somewhere to rest and relax
- ▲ E02. That it is somewhere with a friendly, genuine welcome
- ▲ E03. A unique and distinctive holiday experience
- E04. That it is somewhere you feel safe
- ▲ E05. That you are able to find out about the stories of the people and place you are visiting

Attractions/Activities

Attractions and activities are of course key to the experience. Some elements are particularly important...



Positives

- **'Cities, towns and villages that give its own distinctive sense of place', 'Unique things to do and see that reflect the local culture' and 'Information about the places you visit'**. These attributes are key to the overall visitor experience and each of these has improved notably compared to 2011.
- The improvement of these metrics may have been helped by the local cultural events in Northern Ireland during the summer of 2013 such as Fleadh Cheoil, Derry~Londonderry City of Culture etc.
- The diverse range of activities undertaken demonstrates there was something to cater to most tastes - families gave favourable ratings for the range of things to do with children.



Negatives

- **'Range of things to do in the evenings' and 'Range of things to do on Sundays'** are amongst the lowest performing attributes.
- They perform significantly below the average and their higher derived importance puts them in the hidden (and currently missed) opportunities segment of attributes.
- Ensuring information on activities during these times is readily available, either through staff in accommodation and TICs, or through websites could help. Ensuring the prioritising of funding for activities on Sundays or evenings is also key to improve the overall experience for visitors. The opportunity should also be taken to enhance promotion of things to do which ARE available on Sundays (museums, parks & gardens etc.)
- Value for money can be partly addressed through joint ticketing, clustering and packaging

Northern Ireland itself – the importance of the people and welcome continues to sit at the heart of the offer

- The top rated attribute 'being somewhere with a friendly, genuine welcome' has been improving steadily since 2009 – and its importance demonstrates how central it is to the visitor experience, and that the people and stories of Northern Ireland are what build the strongest memories for visitors. This is a clear area of competitive advantage.
- Although functional experience drivers are key to maintaining visitor satisfaction, the 'friendly and genuine welcome' is one of the most important factors in visitor experiences and has a positive influence on overall performance scores.
- There have been declines, however, in ratings for 'feeling safe' reflecting negative press coverage of street protests and disturbances in early 2013.

Mean score out of 5	2009	2011	2013
That it is somewhere with a friendly, genuine welcome	4.0	4.1	4.2
A unique and distinctive holiday experience	-	-	4.0
You are able to find out about the stories of the people & place you are visiting	3.8	3.5	4.0
That it is somewhere to rest and relax	3.7	4.2	3.9
That it is somewhere you feel safe	3.7	4.0	3.8

Northern Ireland itself

When asked to describe their visit overall in 3 words, the following emerged as strong themes.

Discovery came across strongly and is a word that visitors associated with exploring the natural sights and surroundings, from trekking the unspoilt peaks of the Mourne Mountains to being able to following coastal routes and challenging themselves at legendary sites such Carrick-a-Rede.

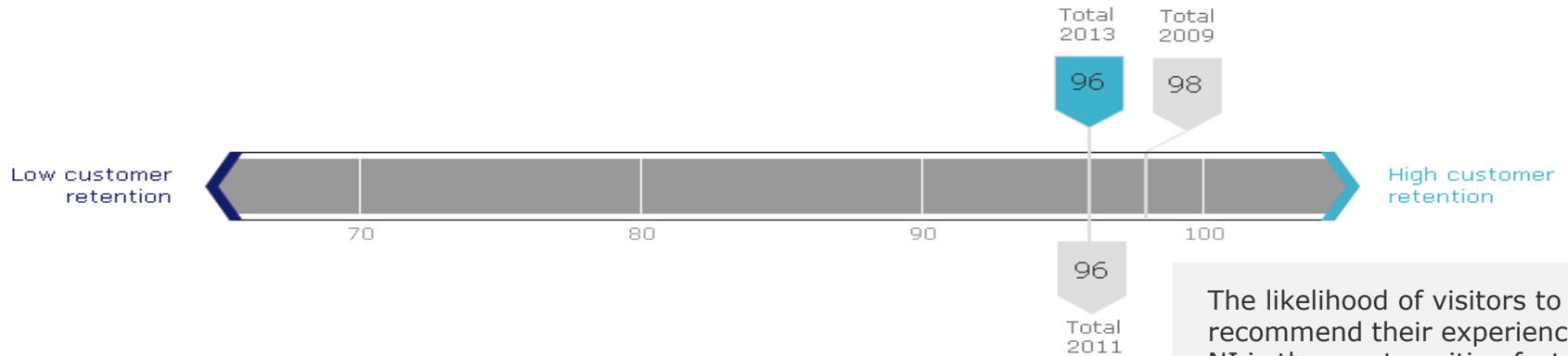


Cultural A developing theme for NI, this encompassed a wide range of experiences and in addition to unique historic attractions, it also included a summer of events, which provided opportunities to tie in activities that connect with local culture (e.g. local attractions and themes). NI still needs to work on promoting the authentic and unique elements that can be brought out in more local or clustered experiences.

The **friendliness and welcome** received during visit is what really characterises Northern Ireland for visitors - interactions with the staff, locals and other people visitors meet are often some of the most rewarding parts of the trip - something that can't be replicated elsewhere and gives Northern Ireland a unique appeal.

An overall index of Northern Ireland's performance

An assessment of the impact of the overall NI experience is represented by the TRI*M score, comprising 4 metrics such as overall satisfaction and advocacy. While this has remained strong, this evidences the opportunity to drive up satisfaction by increasing our competitive advantage.

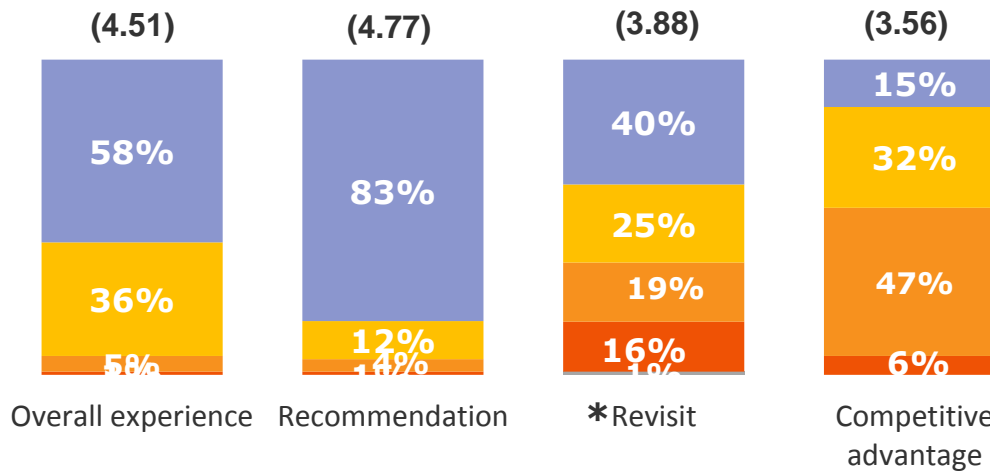


The likelihood of visitors to recommend their experiences of NI is the most positive factor of the TRI*M score, while detractors are the competitive advantage compared to other destinations and the likelihood to revisit. By concentrating on these measures, while maintaining recommendation, NI can improve its overall TRI*M score

*Revisit score is affected by proximity to the visitor's home country, with those from ROI and GB being most likely to return

Mean score :

- 5
- 4
- 3
- 2
- 1



In Summary:

By focussing on the following strengths, you will retain existing levels of satisfaction and active recommendation

High level strengths

That it is somewhere with a friendly, genuine welcome

Medium level strengths

Cities, towns and villages that give the destination its own distinctive sense of place

Friendly and efficient service

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

Information to tell you about the places you visit

That you are able to find out about the stories of the people and place you are visiting

Friendly and informative staff

Low level strengths

A unique and distinctive holiday experience

That it is somewhere to rest and relax

Ease of finding suitable accommodation

The availability of useful information to help you plan your trip

Efficient customer service

Staff on tours and in attractions tell stories about the local history and places of interest

Availability of convenient air and sea routes to reach the destination

Consistently rated as top attribute since 2009 and a real differentiator for NI offering real competitive advantage.

Other strengths relate to other experiential factors. While the practicalities of a visit such as travel and accommodation are important, the most positive impacts are to be made through connecting visitors to what is special about NI.

Competitive advantage ratings were the lowest of the TRI*M metrics, this shows the importance of ensuring that Northern Ireland stands out from other destinations – and this is where experiential tourism focus CAN make a difference.

But to extend and improve your performance, attention must be paid to the following functional weaknesses in the NI product. These are holding back growth

High level weaknesses

None

Medium level weaknesses

Information on places to eat and drink out
Restaurants, cafes and other food outlets that are good value for money
Range of things to do in the evenings
The cost to travel to your destination

Low level weaknesses

That it is somewhere you feel safe
Value for money
Value for money of attractions (historic sites, museums, visitor centres, etc.)
Places to eat available at the times of day and night that suit you
Range of things to do on Sundays
Public transport is available and convenient

Some aspects of **eating out** presented areas of weakness. Information on places to eat and drink out emerged as an area of weakness in 2011, showing that this still needs to be improved upon and that despite great developments in Northern Ireland's food scene, visitors are not benefiting from this just yet. This could provide NI with a competitive advantage – at present it is not at all differentiating.

Another mid-level weakness was the **cost of travel to the destination**, with the highest dissatisfaction amongst European visitors, which may reflect higher expectations of cost due the competitive low-cost travel market within Europe.

Experiential Tourism



Defining experiential tourism

'Experiential tourism' definition has evolved over the last 12 months. In the survey it was introduced as:

"Experiences that allow you to become really involved in the place you are visiting by bringing to life surroundings, heritage, culture and history. They differ from just a passing tourism experience as they will make you feel connected and engaged with Northern Ireland in a memorable, emotional way, to make you feel that you have really 'experienced' Northern Ireland"

Questions were then phrased in such a way to understand general interest in the concept and then their preferred level of immersion from 'toe dipping' through to 'full immersion'.

This was further illustrated by capturing specific examples of memorable experiences – both in the quantitative survey and in the online qualitative discussion.

The pyramid to the right shows the different levels of 'experiential' tourism and how visitors can engage with Northern Ireland in a deeper way.

Global experiences:

- Fewer in number
- Stand out attractions that destinations rely on
- International demand for these sites draws visitors to Northern Ireland

Clustered experiences:

- Smaller in scale but can be an equal draw
- Two or more things to see/do packaged/clustered around a theme or destination (e.g. Causeway)
- Benefits a number of local sights/business

Local experiences:

- More of these experiences to be had but highly individual and unique
- Can be businesses that go the extra mile or accommodation that exhibits local culture/life

We used consumer friendly language to best convey the different experiential themes:

Living Legends – Storytelling and local history – allowing visitors to immerse themselves in the history and heritage of Northern Ireland e.g. from the legends of Giant’s Causeway and St Patrick to the historic City Walls of Derry and Belfast Titanic heritage

Coasts and Lakes– Natural surroundings - Northern Ireland’s lakes and coastal scenery, including scenic drives, beaches, boats/barges, fishing , and enjoying the outdoors

Unique Outdoors – Natural surroundings - Enjoying Northern Ireland’s landscapes through outdoor activities, from climbing or mountain-biking to more passive activities

Culture and Creative Vibe – vibrant cities and creative culture/arts, festivals and events, theatre, poetry, literature, music, shopping, sampling famous pub atmospheres

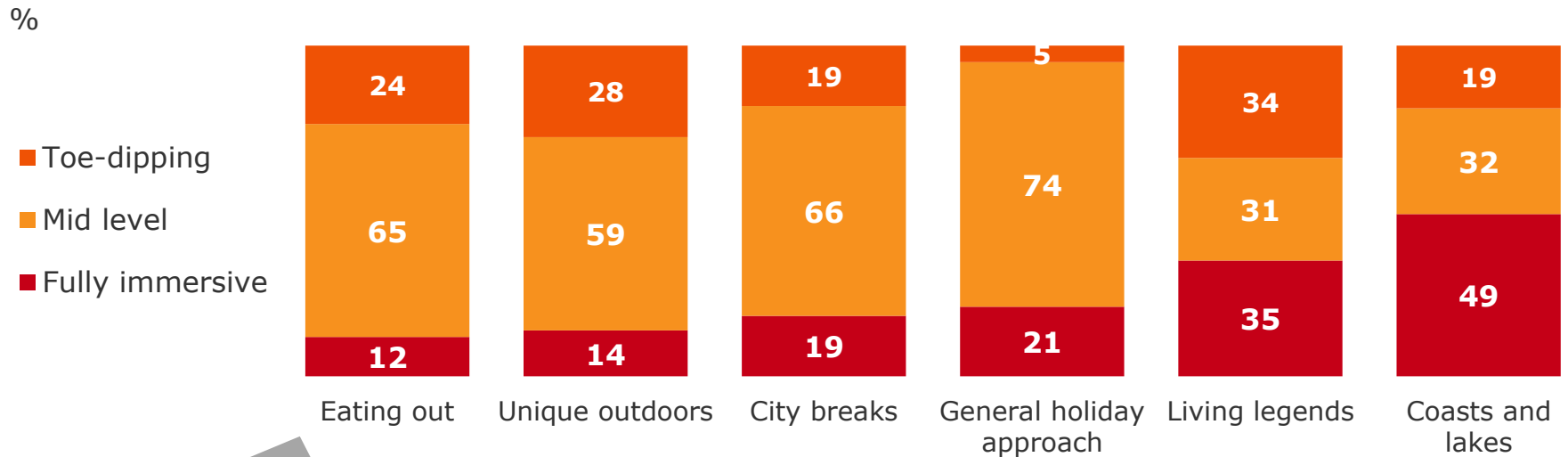
Naturally Northern Ireland – Reflecting the character of Northern Ireland which is reflected in the people, food and culture

Levels of immersion across NI tourism touch points

Visitors were asked to indicate their preferred level of immersion from the following propositions

	Toe-dipping	Mid-level	Fully immersive
Eating out	Eating out in a restaurant, cafés or pubs	Eating out in a restaurant which presents authentic Northern Ireland menus highlighting the use of local produce	Watch demonstrations of local dishes being produced or actually having a go at making local dishes (e.g. in cookery school/restaurant)
Coasts and lakes	Catching a glimpse of the natural scenery such coast or lakes on a scenic drive	Stopping for a picnic or walk in the surroundings	Following a planned touring route which takes in rural/coastal towns and villages, experiencing local hospitality and activities
Unique outdoors	Enjoying the natural outdoors from scenic roadside view-points	Enjoying the natural outdoors through a relaxing walk or cycle	Invigorating yourself by participating in adventure activities that connect you to the natural surroundings e.g. climbing or mountain biking
Living legends	Seeing historical sites and visitor attractions	Going on a guided tour around the sites/attractions	Experience story-telling and/or experiencing re-enactments which bring to life the local history, legends and stories
General holiday approach	A relaxing holiday where I switch-off from everything	Relaxing but also sampling the local sights and culture	An invigorating holiday where I was challenged and got involved in new things
City breaks	City break to shop, visit restaurants/pubs or people-watch	City break exploring local culture by taking in a local performances, shows, music, festivals, or art galleries	City break with action-packed days and fun-filled nights, experiencing everything Northern Ireland's cities/towns have to offer

94% of visitors found the concept of experiential tourism very/quite appealing. Appetite for fully immersive experiences was greatest for the coasts and lakes and living legends experiences.



Fully immersive included being fully involved in watching/making dinner which had more limited appeal - authentic menus and local produce were very popular though

High appetite for immersive experiences amongst NI's iconic themes

Memorable Experiences

Experiences that allow you to become really involved in the place you are visiting by bringing to life surroundings, heritage, culture and history. They differ from just a passing tourism experience as they will make you feel connected and engaged with Northern Ireland in a memorable, emotional way, to make you feel that you have really 'experienced' Northern Ireland

These experiences can take many different forms, from being involved in a one-off activity, to the collection of experiences throughout your stay that gave you a real sense of NI

- After being introduced to experiential tourism using the description on the left, visitors were asked if they had had any memorable, enjoyable experiences like this that connected them to NI during their trip
- Visitors were then asked to tell us about their most memorable NI experiences
- 81% of the visitors interviewed claimed to have had this type of memorable experience (lack of time or being on a planned itinerary were the main reasons given by those who didn't)
- Of the 80% who did have this type of memorable experience, almost half felt that their experience played a central role in their trip

Stories to bring NI to life to get a real sense of the culture, as well as activities with a 'wow factor' and beautiful landscapes, were all key in delivering memorable experiences

Agreement with statements about visitor's personal 'Memorable' experiences in Northern Ireland	% Strongly agree/agree	
It brought Northern Ireland's stories/heritage to life	89%	
Experienced activities and places with a "wow" factor	86%	←
Allowed me to enjoy the beauty of the landscape	86%	
I got a real sense of Northern Ireland's culture	86%	←
Broadened my mind/stimulated my thinking	81%	←
I felt inspired by my experiences	79%	
It allowed me to do something I would not be able to do anywhere else	74%	
Connected with the locals	73%	
Feel connected to nature	67%	
I chilled and enjoyed slowing down to a different pace of life	56%	
Meet and have fun with other tourists	42%	
It allowed me to challenge myself	38%]
I became physically healthier	31%	
I learned a new skill	13%	

High agreement shows the unique 'competitor advantage' NI has

High agreement ties in with themes of learning and discovering

Less agreement with the more niche, 'fully-immersive' elements, shows that many of the experiences were not at this end of the spectrum



1. Living Legends

The stories themselves were unique, but the ways in which they were told, for example, historical re-enactments and staff at attractions in authentic costumes, enhanced their experience and made them memorable. Over a third of visitors are looking for this type of 'fully-immersive' offering from the historical and cultural attractions they visit.

54%

of the memorable experiences related to the 'Living Legends' pillar

(the most popular theme)

When asked to summarise the experience in 3 words...



Tended to include larger historic or cultural attractions such as Titanic Belfast, Giant's Causeway, Derry walking tours, Ulster American Folk Park and Ulster Folk & Transport Museum

The **educational** element of these experiences is something that visitors really value, and done in an engaging, vivid way, can appeal to all types of visitors. **Discovery** meaning the ability to surprise and surpass expectations is also an important element, allowing tourist to uncover new and unexpected parts of NI.

2. Coasts and lakes

Encompassing more relaxing, accessible ways to enjoy coasts and scenery, including walks, coastal drives and exploring more rural areas of NI. Our coastal and Lakeland towns and villages and their attractions also provide a cultural experience, learning about NI's stories and engaging with the friendly locals. There is a high demand for offerings that will fully engage visitors with the towns and culture of the coasts and lakes.

24%

of the memorable experiences related to this theme

When asked to summarise the experience in 3 words...



Tended to include the coastal themed sights such as those along the Causeway Coast, and also nature reserves and Lough Neagh

The **discovery** element is key to this experience, allowing visitors to explore NI at their own pace. Also, the **friendly**/people aspect features quite strongly within this experience. **Unique** also plays a big part with sights along the Causeway Coastal Route being the most obvious example.

3. Unique outdoors

Often with the help of locals, visitors were able to enjoy exploring Northern Ireland's unique coastlands and rugged scenery through engaging in a range of outdoor activities. High activity sports are more niche in terms of their demand, providing an immersive experience and opportunity to challenge themselves.

24%

of the memorable experiences related to Unique Outdoors

When asked to summarise the experience in 3 words...



Varied from leisurely walking through natural sites to more independent pursuits such as hiking the Mourne Mountains or cycling the coastal routes

The freedom to explore was apparent as an important element in these experiences, with many visitors choosing the word **discovery** to describe their experience, as were the personal benefits felt as visitors were **inspired** and **invigorated**.

4. Culture and creative vibe

This was a wide-ranging theme encompassing local events and everyday life. Vibrant nightlife and festivals allowed visitors to join in and learn something new. Less about relaxing but more about exciting and engaging experiences, both **cultural** and **educational** aspects provided the most memorable experiences, with friendly people playing an important part too.

31%

of the memorable experiences related to 'Culture and Creative Vibe'

When asked to summarise the experience in 3 words...



As well as being fun, sociable experiences, visitors relished the opportunity to soak up and get involved in a new culture. Again, the ability to learn something new emerged as a key factor

For visitors, this theme covered a wide range of experiences from nights in traditional pubs to cultural sights/exhibitions (e.g. Navan centre), but the events of Derry-Londonderry UK City of Culture 2013 featured highly amongst experiences mentioned, along with other local events.

5. Naturally Northern Ireland

This theme appeared across all types of visitor experience and the character of Northern Ireland is particularly reflected in the people. The two ways in which the natural culture and character of Northern Ireland underpinned all types of experience were:



Warmth, welcome and character of Northern Ireland people

Facilitating discovery – hidden gems

Going 'off the beaten tracks' and exploring places where there are not many people, but just wild and rough nature. Locals were very helpful in finding such places.

Character/entertainment emerging in unexpected places

Almost literally running into a group of men Road Bowling. Interesting slice of local life. One of my favourite stories to tell about our trip!

Emotional connection – being welcomed by locals

I found the Northern Irish people extremely friendly, even just walking down the street people would say hello. Wherever one went the friendliness was shown. That is the first thing I tell anyone who asks about my trip to Northern Ireland!



The Authentic, Genuine & Proud NI

Being able to see and experience local life and getting a sense of 'real' Northern Ireland was just as memorable to many visitors as big, global level attractions.

It felt like the locals really wanted to get to know you and in turn taught us a lot about the local culture and history.

I love the pride locals have in their country, plus their easy going manner and sincerity.

Although discovery and spontaneity are important, visitors can be encouraged to explore NI through recommendations from locals and staff

5. Naturally Northern Ireland

The character of Northern Ireland is reflected in the people, foods, and culture.

In addition to being warm, welcoming, authentic and proud, the NI people went the 'extra mile'

“

People in the B&Bs would make dinner reservations for us at local places, calling ahead so that we felt very welcomed when we arrived.

The hotel owner is mailing me a bag of souvenirs I forgot in the hotel room.

We were welcomed like family at our accommodation which continued for our entire visit.

The owner of the B&B in Derry took us to the highest peak to take pictures and see their beautiful city from a point I would never have known.

I mentioned to the coach driver that it was my 50th birthday. He liaised with the hotel staff and I got a cake and card signed by everyone. It was lovely.

”

NI food/crafts/culture

“

Sampling soda bread and champ...delicious.

Enjoying a fantastic meal of fresh local food in a modern, funky restaurant in Belfast.

My husband and I loved the Belleek Factory Tour where we were able to watch the pieces actually being hand-crafted and were able to interact with artisans as they were working on the pieces in front of them.

St. George's Market – really got a taste of the local arts and crafts as well as local food and people...My grandmother always took me to local markets so it was a bit of a yesteryear for me.

On our walking tour of Derry we went into a little church where there was weaving going on and we actually got to help out with the weaving.

Lots of local produce at the show. I particularly enjoyed the local cheese. Seeing the schools' art work and the flower, vegetable and bakery competition entries gave a sense of local life. The show was vibrant and wholly enjoyable.

”



1. Living legends – Storytelling and local history

Bringing stories to life through people and interactive experiences, enabling visitors to get an authentic sense of our history



Visiting the Navan Centre. The history of the early people in Ireland was beautifully portrayed by two actors who made the whole experience come alive for us, giving us a feeling of what it was like in the past.

Patterson's Spade Mill – fascinating and wonderful to see the Mill working, the water flowing, the hammers hammering and a spade being made.

It was funny to experience a museum (Ulster American Folk Park) alive with people dressed in the old days...you really understood why people looked for gold in America.

Our tour of Titanic Belfast was so awe inspiring. To walk along where the ship was built was awesome.

The Titanic Experience was the absolute best museum/interactive attraction I have been to EVER.



Our guide at the Giant's Causeway was funny and engaging...I will remember more things because of the entertaining way I learned them.

The audio guides at the Giant's Causeway were fantastic. The kids enjoyed listening to the children's guides and they were captivated by the stories.



2. Coasts and lakes

Visitors were relaxed and inspired by NI's unique outdoors – an experience enhanced by interacting with people and their stories along the way:

Discovery, getting away from it all and connecting with landscapes through people and stories

“

Driving along the Glens of Antrim, down to the beautiful coast, chat with the fishermen and have a drink together in the pub.

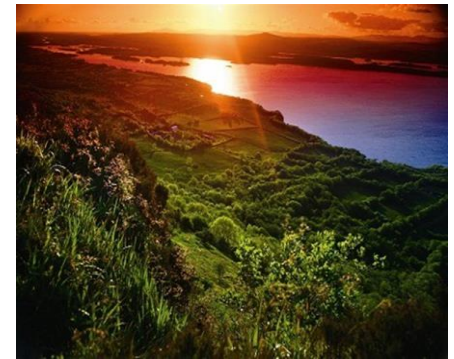
Staying in the National Trust cottage with stunning views of the coast and easy access to the local craic at the village pub with brilliant cuisine and great beer.

Fermanagh has to be one of the most hidden jewels in Northern Ireland. We took a short boat tour to a monastic site on an island...beautiful!

Travelling around the 'Mourne Route' by car helped soak up a special atmosphere and attachment. Crossing Strangford Lough on the ferry with my son as he took us on a day tour...being so close to the sea is so relaxing!!

Eating ice-cream on Portstewart Prom whilst watching the sunset with an amazing red sky as young people jump off the harbor wall into the sea.

”



3. Unique outdoors

Visitors who undertook activities along the coastlines and mountains got to discover Northern Ireland and felt connected to and inspired by our unique landscapes



Each of our games (golf) was different and exciting. The caddies that we engaged with were unique, most informative and made each game fun. We had the opportunity to visit Holywood and met Rory's uncle at the clubhouse. The members were very friendly and welcoming.

Walking through a peat bog in the Sperrin Mountains to discover a wedge tomb not on the tourist map and look over the expansive view.

Surfing lessons at Benone Beach...beautiful white sandy beach.

Mountain biking in Rostrevor, Co. Down – brilliant!

Sperrins – excellent hill walking and cycling.

Cycling around seeing the beauty and remoteness of the land, seeing people cutting peat and asking farmers to camp on their land for the night. Wonderful.

Cycling around Newcastle and Murlough Beach. There are plenty of places to stop and something new to discover around every corner. We stopped at Dundrum and had a meal in the Seafood Bar and headed off to visit Dundrum Castle. The views from the top were incredible and the children loved exploring the buildings within the grounds.



4. Culture and creative vibe

The vibrant and creative side of Northern Ireland was show-cased in local festivals/events and nightlife



“

We spent a night in Derry when the Fleadh was on. We had the best time visiting various pubs, getting really close to the musicians and enjoying the unique charm of traditional Irish music. The people, the events were excellent and the atmosphere was electrifying and stimulating.

Had an amazing weekend in Belfast. The city is so young and buzzing and alive. Great shopping and the Cathedral Quarter had a vast array of coffee and food vendors. Nice to see the 'buzz' of Belfast

Loved the nightlife in Belfast...great atmosphere.

Derry is a very vibrant and young city yet it has so much culture. I loved the history/culture combined with the vibrant buzz of the place. The people were so friendly.

Searching out and finding the Dark Hedges...exciting!
Visiting other locations where Game of Thrones was filmed and along the way finding some beautiful sites and places to wander.

...we heard authentic Irish music coming from down an alley. We went to explore and found a gentleman entertaining the pub crowd singing and playing his guitar. We perched on the only stools we could find. The atmosphere was amazing, it was buzzing and everyone was joining in with the songs. My mum and I both had huge smiles on our faces and then mum joined in too as she knew some of the songs!

”

Northern Ireland's experiential offer – Example of best practice

Titanic Belfast – A Global level experience



What made this unique and memorable for visitors?

Understanding the city you're visiting

The setting

Experiencing the past

Personal connection
e.g. relatives involved with the Titanic

Interactive
e.g. feature allowing visitors to walk full-scale drawing of ship

How did visitors describe the experience?

An important part of the experience for visitors was being able to learn about the city and country they were visiting. The Titanic Belfast experience allowed visitors to see beyond the current surroundings to the cultural and historical influences on the city.

Inspiring
Engaging
Cultural
Discovery
Authentic
Unique
Modern Friendly
Exciting

The Titanic Belfast museum is a successful standalone, global experience for Northern Ireland visitors. It is not currently seen as connected to a wider, clustered Titanic theme. This could be addressed through packaging and joint ticketing opportunities.

Visitors' experiences in their own words

So much local history on how the ship building industry shaped Belfast. Made all the more authentic by the Museum itself being on the precise spot where the ship was built.

An absolutely world class exhibition. The architecture, the interactive parts of the exhibition and indeed the whole complex is something Belfast & NI should be very proud of.

Of particular interest to me as 2 of my great-uncles were crew members on the Titanic and I was able to visualise the conditions of their workplace.

Visit to the Titanic Museum was an amazing interactive experience. A highlight of the trip.

Northern Ireland's experiential offer – Example of best practice

Derry~Londonderry– A clustered experience around a destination

Derry~Londonderry offered a clustered experience across a range of experiential themes demonstrating how it is already functioning as a cultural Destination Experience. Visitors described how they had a fantastic 'end to end' experience encompassing the people, landscape, attractions, B&Bs, history, culture and music.

What made this unique and memorable for visitors?

Encountering the unexpected musical acts and parades

Dramatising the past e.g. costumed re-enactments

Vibrant culture – Fleadh, Tattuo, City of Culture events

Joining in local crafts

Introducing the City – the wall

How did visitors describe the experience?

"Re-enactments on the walls in Londonderry, describing what it was like during the 1600s and the time of the siege. Characters in period costume. **Very interesting and engaging** for adults and teens alike"

"The music sessions were great and I felt the place was steeped in culture. **The city looked great -it was vibrant** and I enjoyed every minute of the Fleadh. Well done Derry"

"We were invited to take part in a tapestry weaving event at St. Augustine Church. **We feel connected to this area now**, since we spent about 20 minutes weaving yarn into the tapestry. It was wonderful"

The 'end to end' experience

"We were bowled over by the city...The people were so friendly and warm, the events were excellent and the atmosphere was electric and stimulating...The city walls are a great attraction...Derry city is a very vibrant and young city yet it has so much culture...I loved the vibrant buzz about the place."

2013 was special given that Derry~Londonderry was the UK City of Culture. The associated City of Culture events, together with the compact nature of the city, helped enhance the visitor experience.

Northern Ireland's experiential offer – Best practice

Ulster American Folk Park / Folk and Transport Museum

Local level experience



What made this unique and memorable for visitors?

Unique ways of learning about the past

An interactive experience that appeals to all ages

Individual stories that make history personal

Allowing visitors to connect with their heritage

Keeping traditions and crafts alive

How did visitors describe the experience?

- Key historic influences on NI that shaped its culture were brought to life in a very real way
- Visitors were invited to uncover the stories & see/experience the way people lived – going beyond passive experiences
- Demonstrations of local crafts made visitors feel that they had connected with locals

Cultural
Unique
Discovery
Educational
Engaging
Authentic
Traditional
Relaxing
Exciting
Vibrant
Friendly

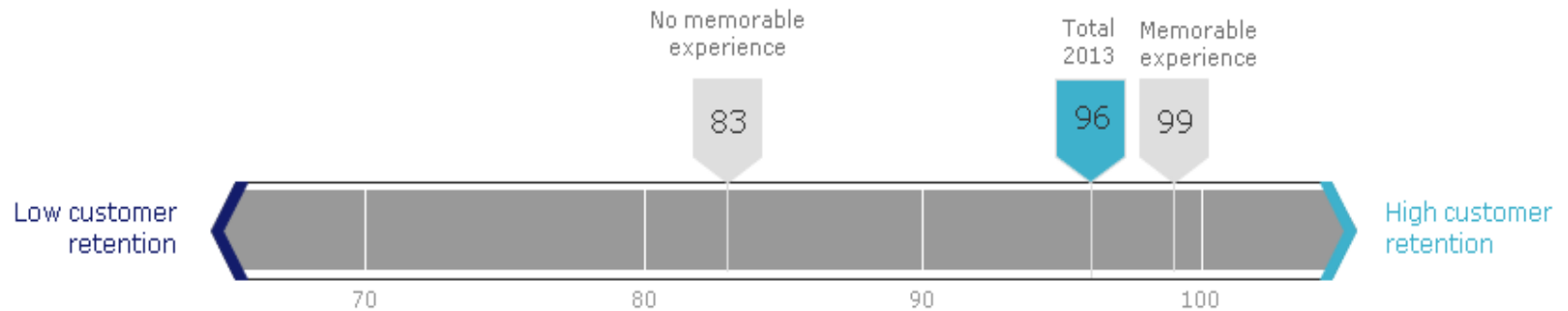
Visitors' experiences in their own words

"Ulster-American Folk. In the buildings there were people dressed authentically and practising authentic crafts/ways of life. We talked to a lady who was spinning yarn and a lady who was making corn bread. They knew a lot about how people would have lived in that era and about their craft. We were able to sit and talk to them and ask them questions about what they were doing."

"Chatting to the blacksmith and the basket weaver at the Ulster Folk & Transport Museum and watching them work. It was a great educational experience with lots of fun and laughter... The staff were amazing, knowledgeable and charming."

The impact of experiential tourism on perceptions of NI

The positive impact of visitors' memorable experiences on their satisfaction and perceptions is clearly displayed below by the significantly higher TRI*M score



Those who had a memorable' experience were more likely to recommend Northern Ireland:

97% vs. 86%
(without memorable experience)
Would definitely/probably recommend NI

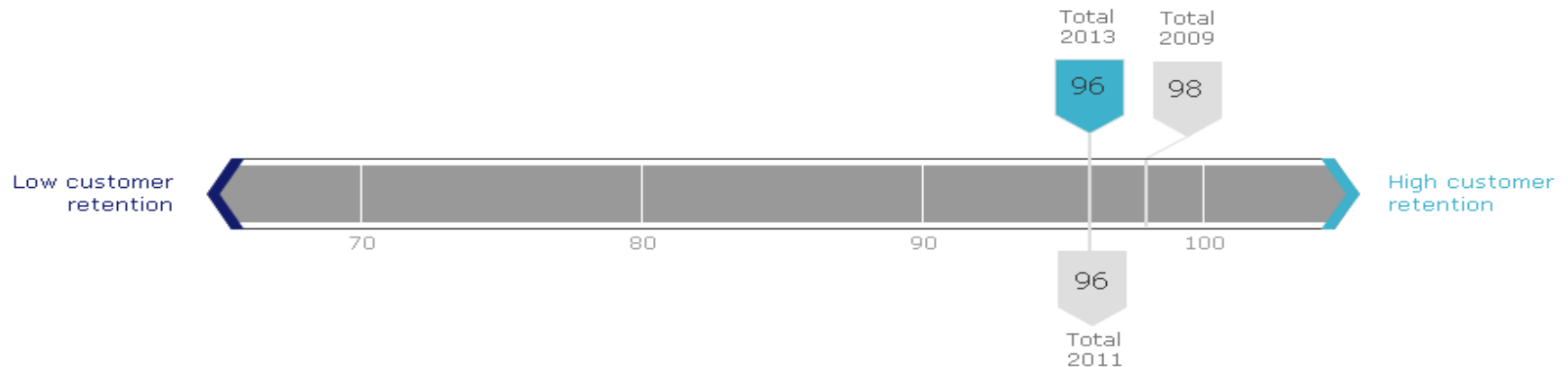
Also more likely to give higher competitor advantage ratings:

51% vs 31%
(without memorable experience)
Rate NI as much/slightly better than other destinations

Therefore, experiential tourism clearly enhances the visitor experience and has the potential to provide NI with a real competitive advantage

An overall index of Northern Ireland's performance

In the previous section we have explored the impact of various aspects of the visitor journey on the overall experience of Northern Ireland, but the background and demographics of visitors also had an impact on experience.



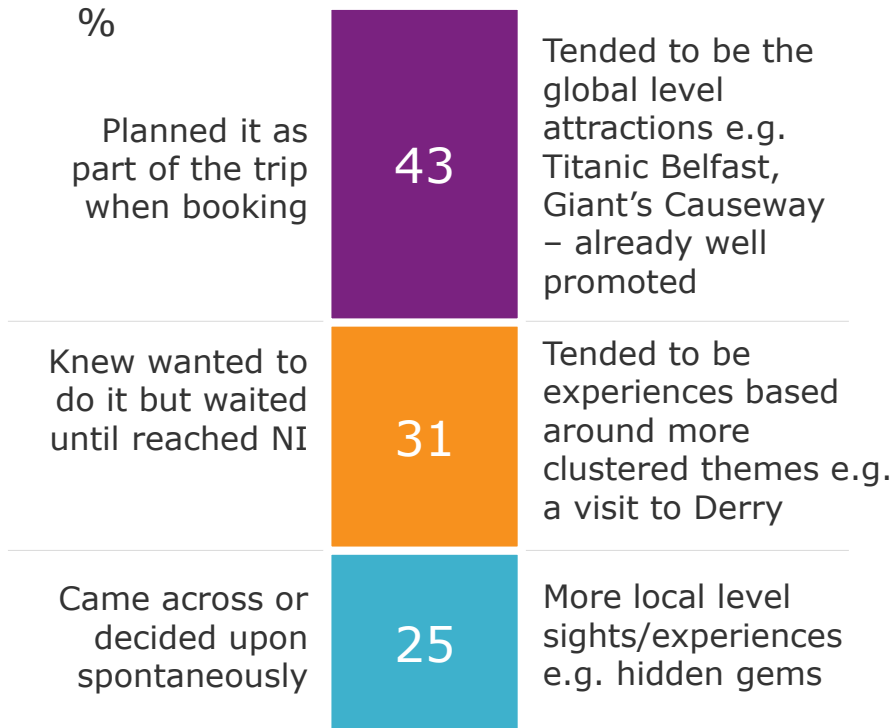
Lower TRI*M scorers

- European visitors gave the lowest TRI*M scores. Tending to score lower on the whole, particularly if or more practical elements such as value for money, information on eating out etc.
- Couples also gave lower TRI*M scores - due to lower ratings for likelihood to revisit and competitive advantage. Couples are more likely to see their trip to NI as a one-off.

High TRI*M scorers

- North American visitors gave the highest TRI*M ratings driven by high performance and recommendation, but lower for likelihood to return.
- Families also gave high TRI*M scores, driven mainly by the likelihood to return – likely to be visiting from closer countries.

Pathways to memorable experiences



Visitors provided examples of global, clustered and local experiences.

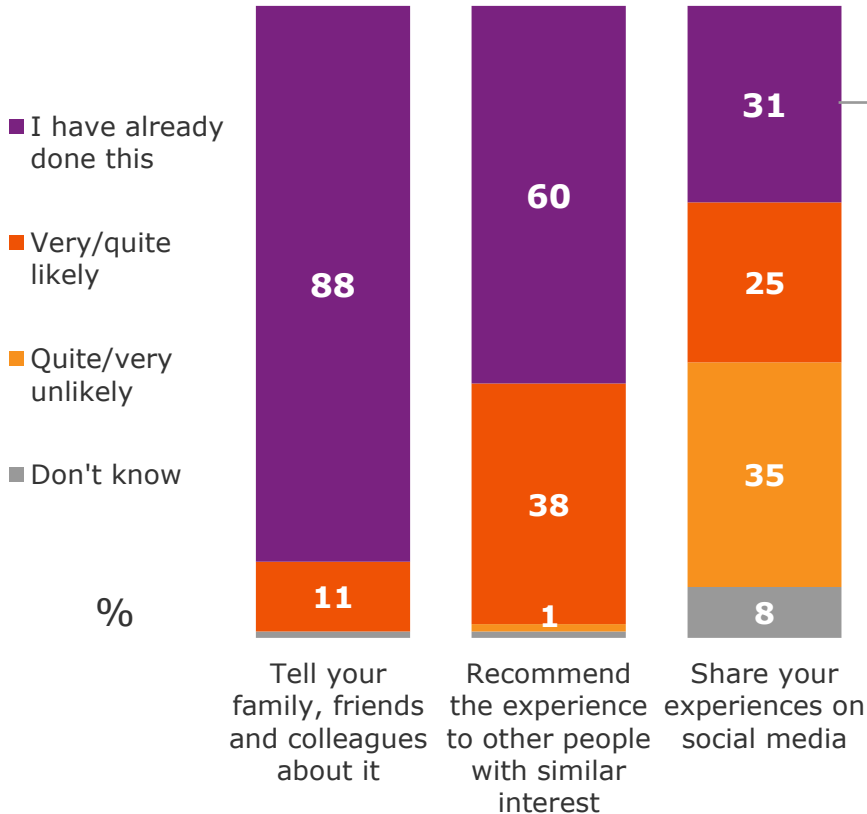
The highest proportion were global experiences, pre-planned, demonstrating their ability to attract visitors.

Clustered and local experiences are important to support the global experiences and their unplanned nature provides opportunities to retain visitors for longer.

Spontaneous hidden gems are none the less memorable and rewarding for visitors.

Sharing and recommending encounters in NI

It is difficult to 'market' spontaneous or more local level experiences but often visitors themselves can be best placed to promote them. A good experience is almost definitely shared.



Visitors are becoming more public about sharing their experiences...

Nearly a third of visitors shared their experiences on social media, rising to 45% amongst 16-34 age group

8% of visitors said they used social media to plan their visit to NI (16% 16-34)

Online review sites such as Trip Advisor are powerful consumer tools and becoming more influential:

“ I shared information about a couple of lovely B&Bs we stayed at on Tripadvisor. I rely on Tripadvisor when I look for accommodation so I thought it fair to share that in return ”

Take away messages



People matter

- The key strengths emerging from the research are not unfamiliar. The NI people (locals and staff) have consistently emerged as what sets us apart as a destination and makes us 'uniquely NI'
- Additional analysis from this research highlights that is not just our welcome that is distinctive, it is our sincerity, pride in NI and desire to go the 'extra mile' for our visitors. This combination was powerful in forming lasting impressions and memorable experiences for visitors to NI

Experiential tourism pays

- This research shows experiential tourism pays – it results in visitors having a better overall experience, spreading the word about the fantastic experience they have had, recommending NI to their family/friends and it gives NI competitive advantage
- Exceptional visitor experiences go beyond the time visitors spend in any single attraction or location. Planning and delivering exceptional visitor experiences requires considering the entire visitor journey from the visitor's perspective, from the moment they think about travelling until they are sharing stories, photos and videos at home or online. This will require the tourism industry to work much more closely together to offer the visitor an end to end or holistic experience that meets the individual needs of each segment

Need to get the basics right

- We still need to ensure we are getting the basics right, e.g. aspects relating to eating out, and strive to improve these. Ultimately NI will be able to enhance its experiential offering by focusing on experiences that play to its strengths: authenticity and the warmth of the people, while ensuring it remains genuine as opposed to managed

Satisfied visitors but not yet 'best in class'

- Overall visitors to Northern Ireland are satisfied but the totality of the Northern Ireland experience could not be described as 'best in class'. Other tourism destinations are delivering a better experience to their visitors. We must deliver a better and more joined up tourism offer across Northern Ireland

“A tourism product is what you buy. A tourism experience is what you remember.”

Canadian Tourism Commission