Titanic Belfast

Visitor experience survey 2013

MillwardBrown

All research conducted in compliance with the International Standard ISO 20252:2012
Aims, Objectives & Methodology
Aims & objectives

The specific aims of the study were to:

• Identify the impact of the new visitor centre in influencing visitors and domestic tourists to come to Belfast and Northern Ireland.

• Provide quantitative measures of satisfaction for the Titanic Belfast visitor attraction.

• Capture aspects of visitors’ experiences beyond the attraction and determining the influence of Titanic Belfast on shaping visitors’ trips.

• Identify the impact of Titanic Belfast on the wider visitor experience.
Methodology

<table>
<thead>
<tr>
<th>Sampling</th>
<th>Data Collection</th>
</tr>
</thead>
<tbody>
<tr>
<td>All adult visitors (aged 16+)</td>
<td>Face-to face</td>
</tr>
<tr>
<td>Interviewing conducted across a range of times and dates (covering both peak and non-peak times)</td>
<td>Utilised Millward Brown specialist HAPI (Handheld Assisted Personal Interviewing) devices</td>
</tr>
<tr>
<td>Random sampling technique – every 3rd person approached for interview and only one person per party (although this ratio was reduced during times of low footfall)</td>
<td>A set of core questions asked of all visitors (approx. 1200) and two sets of variant questions asked alternatively to achieve a half sample (approx. 600) for each variant</td>
</tr>
<tr>
<td>All interviews conducted after respondents had completed their visit</td>
<td>All fieldwork carried out between the 27th February and 31st August 2013</td>
</tr>
</tbody>
</table>

- Fieldwork for this survey was completed in August 2013 and some of the recommendations made based on the findings are already being implemented
Sample profile & demographics
Titanic Belfast attracts a wide range of visitor types from all over the world.

Sample profile
Base: All visitors  (n=1209)

Gender
- Male: 60%
- Female: 40%

Age
- 16-34: 24%
- 35-44: 13%
- 45-59: 31%
- 60+: 32%

Country of Origin
- NI: 22%
- North America: 18%
- GB: 25%
- RoI: 20%
- Europe: 8%
- Rest of World: 7%
Group type & party size

Group type
Base: All visitors (n=1209)

- Couple / with partner: 39%
- Family group: 27%
- With friends: 15%
- Tour/ school group: 11%
- On my own: 5%
- With both family and friends: 5%

Total average party size 4.07
Base: All excluding coach passengers (n=1072)

- Adults: 3.81
- Kids: 0.26

Group type & party size

- Titanic Belfast appeals to a wide range of visitor segments
- Only a small proportion of visitors (13%) brought children with them, which is partly reflective of the large proportion of visitors the attraction gets from outside NI
Awareness & influence
Awareness and influence of Titanic Belfast

Pre-trip awareness
• 80% of out-of-state visitors were aware of Titanic Belfast before planning their trip (awareness highest amongst visitors from RoI at 92%)

Influence of Titanic Belfast in decision to visit
• Three fifths (61%) of out-of-state visitors stated that Titanic Belfast was the main reason or a very important reason for coming to NI
• Almost all (95%) visitors from NI stated that Titanic Belfast was the main reason or a very important reason for visiting Belfast

When decided to visit Titanic Belfast
• 94% of visitors from RoI and 77% of visitors from GB and overseas decided to visit during the planning of the trip before leaving home
• This demonstrates that Titanic Belfast is a must see visitor attraction in NI and draws out-of-state visitors into the country
Type of trip, duration & travel
Visitors staying overnight
Base: [Variant A] All visitors excluding Belfast residents (n=1117)

Visitors staying overnight in Belfast

<table>
<thead>
<tr>
<th></th>
<th>Overnight</th>
<th>Daytrip</th>
</tr>
</thead>
<tbody>
<tr>
<td>All visitors (excluding Belfast)</td>
<td>59%</td>
<td>41%</td>
</tr>
<tr>
<td>NI</td>
<td>10%</td>
<td>90%</td>
</tr>
<tr>
<td>RoI</td>
<td>40%</td>
<td>60%</td>
</tr>
<tr>
<td>GB</td>
<td>69%</td>
<td>31%</td>
</tr>
<tr>
<td>North America</td>
<td>86%</td>
<td>14%</td>
</tr>
<tr>
<td>Other overseas</td>
<td>80%</td>
<td>20%</td>
</tr>
</tbody>
</table>

18% of visitors (excluding Belfast residents) stayed overnight in the rest on NI

- Visitors drawn into NI and Greater Belfast area – Titanic Belfast is a clear demand generator
- Approximately four fifths (77%) of GB and overseas visitors overnighted in Belfast but this drops to just two fifths for RoI. There is an opportunity to work with tour operators, hoteliers, improving combined tickets and promoting the evening economy to encourage more RoI overnights
- Overwhelming majority (81%) of overnight visitors to Belfast were on a short break (1-3 nights)
Influence of Titanic Belfast in encouraging overnight stays

Did Titanic Belfast encourage you to stay overnight in Belfast?
Base: All visitors from GB & overseas staying overnight in Belfast (n=543)

- Yes: 35%
- No: 65%

Did Titanic Belfast encourage you to stay overnight in NI?
Base: All visitors from GB & overseas staying overnight in rest of NI (n=196)

- No: 53%
- Yes: 47%

53% of overnight visitors from RoI

- Titanic Belfast is clearly helping to increase overnight tourism within the city and the rest of the country
- Visitors from GB were most likely to have been influenced to stay overnight by the Titanic Belfast visitor attraction (also much more likely to have arrived directly in NI as opposed to arriving via the ROI)
Travel to the Titanic Belfast

How travelled to Titanic Belfast?
Base: [Variant A] All visitors (n=640)

- Private car: 45%
- Coach: 21%
- Public transport (bus or train): 14%
- Walked: 9%
- Taxi: 9%
- Hop on/off tour bus: 1%
- Other: 1%

Type of coach used
Base: [VarA] All who travelled by coach (n=137)

- Organised coach tour: 77%
- School group: 4%
- Other tour group: 18%
- Tour from cruise ship: 1%
- Other: 1%

With so many visitors arriving by different means of transport it is essential that clear orientation guides and maps signposting other attractions and facilities in the area are readily available.
Titanic Belfast experience
**Type of ticket purchased**

*Base: [VarB] All visitors (n=592)*

**Ticket type purchased**

- Visitors from RoI and GB were most likely to avail of the joint ticketing opportunity.
- Visitors from NI were least likely to avail of the joint ticketing opportunity but this may have been due to previous visits to the Titanic Dock & Pump House.
- Opportunities to offer other joint ticketing to encourage more overnight and repeat visitors (e.g. Nomadic).
Domestic visitors were most likely to make use of the map and listen to the Titanic story as told by staff throughout the different galleries.

The low visitor uptake on the audio guides may be due to the additional £3 charge and the fact that downloading the Titanic Belfast audio guide iPhone app is only half the price.

Notably the audio guide at the Giant’s Causeway is included as part of the entry fee and has a much higher utilisation rate.
Facilities used during visit to Titanic Belfast

Base: [VarB] All visitors (n=592)

Usage of facilities

- Visitors from other overseas countries were most likely to have used the Tourist Information Discovery Point.
- Missed opportunity to utilise Titanic Belfast as a gateway to other Titanic related attractions and other attractions in the Greater Belfast area. A review of the Discovery Point is currently being undertaken.
Extent to which the following aspects enhanced the experience...

<table>
<thead>
<tr>
<th>Aspect</th>
<th>A little</th>
<th>A lot</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>...told the Titanic story in a creative and engaging way</td>
<td></td>
<td>99%</td>
<td></td>
</tr>
<tr>
<td>...the design and architecture added to the overall experience</td>
<td></td>
<td>98%</td>
<td></td>
</tr>
<tr>
<td>...the staff interaction and knowledge added to the enjoyment of the visitor experience</td>
<td></td>
<td>98%</td>
<td></td>
</tr>
<tr>
<td>...gave a sense of what it was like to live, work and travel in the Titanic era</td>
<td></td>
<td>97%</td>
<td></td>
</tr>
<tr>
<td>...the audio guide added to the enjoyment of the visitor experience</td>
<td></td>
<td>95%</td>
<td></td>
</tr>
</tbody>
</table>

Enhancement of overall experience

- A range of different factors from creative interpretation to staff interaction enhanced the overall experience
- Domestic and GB visitors were most likely to state that the stories told by the staff throughout the galleries added a lot to their overall enjoyment of the Titanic Belfast visitor experience
- North American visitors were most likely to state that the audio guides added a lot to their overall enjoyment of the Titanic Belfast visitor experience
Agreement statements regarding Titanic Belfast…

Base: All visitors (n=1209)

<table>
<thead>
<tr>
<th>Statement</th>
<th>Agree</th>
<th>Strongly agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>…staff made visitors fell welcome</td>
<td></td>
<td>96%</td>
</tr>
<tr>
<td>…is a unique must see attraction</td>
<td></td>
<td>95%</td>
</tr>
<tr>
<td>…makes Belfast a more attractive place to visit</td>
<td></td>
<td>94%</td>
</tr>
<tr>
<td>…makes NI a more attractive place to visit</td>
<td></td>
<td>94%</td>
</tr>
<tr>
<td>…is a world class visitor experience</td>
<td></td>
<td>89%</td>
</tr>
<tr>
<td>…easily accessible (prams, elderly, disability)</td>
<td></td>
<td>85%</td>
</tr>
<tr>
<td>…is great value for money</td>
<td></td>
<td>80%</td>
</tr>
<tr>
<td>…galleries would be interesting for young children</td>
<td></td>
<td>46%</td>
</tr>
</tbody>
</table>

Satisfaction with overall experience

- Titanic Belfast is a must see world class visitor experience and makes Belfast a more attractive place to visit
- There is a perception that Titanic Belfast is more suited to an adult market, less than half agreed that the galleries would be interesting for young children. Steps are being taken to make the Ocean Exploration Centre more child friendly and to attract more family events
- Although performing quite strongly overall value for money did not rate as highly as many other attributes in relative terms
Awareness of Tourist Information Discovery Point
Base: [Variant B] All visitors (n=592)

Awareness of Discovery Point
- Need to increase awareness of the Discovery Point. This is currently being addressed through a review of the design of the space in the Discovery Point as well as the content provided.

Satisfaction with Discovery Point
Base: All who visited Discovery Point (n=30)
- The majority of visitors who were aware of the Discovery Point and made use of it were satisfied with the experience.
- More than half of visitors stated a preference for receiving tourist info face to face. Opportunity to have a manned tourist info desk during peak season.
Awareness of other Titanic related attractions
Base: All visitors (n=1209)

- Awareness of other Titanic related attractions was highest amongst visitors from NI and lowest amongst those from North America and other overseas countries.
- Findings emphasise the need to promote and cross-sell the other Titanic attractions.
- Just under a fifth of out-of-state visitors planned to visit additional Titanic or maritime attractions as a result of visiting Titanic Belfast, with almost 1 in 10 planning to visit Titanic’s Dock & Pump House.
Other attractions

Also visiting the Giant’s Causeway as part of this trip
Base: [Variant B] All out-of-state visitors (n=464)

Awareness of other attractions

- Visitors from North America and those aged 60 and over were much more likely to be visiting the Giant’s Causeway as part of their current trip.

- There is a clear opportunity to promote and package Titanic Belfast and the Giant’s Causeway together as two world class visitor experiences.

- Visitors staying overnight in Belfast were much more likely than day trippers to be visiting the Giant’s Causeway as part of their current trip.
Overall experience
**Overall ratings of the Titanic Belfast experience**

*Base: All out-of-state visitors (n=942)*

Within the context of overall trip, would you say Titanic Belfast was...

- **...an important part of the trip** (43%)
- **...one of a number of interesting experiences** (29%)
- **...the highlight** (26%)
- **...not that important to the overall trip** (2%)

### Overall experience ratings

- Visitors from RoI and GB were much more likely to state that Titanic Belfast was the highlight of their trip, although they were more likely to be visiting as part of a day trip.
- Titanic Belfast plays a pivotal part in the trip of visitors from RoI and GB.
- Findings suggest that other attractions and activities also offer a lot in terms of experiential tourism.
Overall ratings of the Titanic Belfast experience
Base: All visitors (n=1209)

Overall the Titanic Belfast experience…

- Exceeded expectations: 47%
- Met expectations: 27%
- Greatly exceeded expectations: 22%
- Fell below expectations: 3%
- Don’t know: 1%

Overall experience ratings

- Visitors from North America and GB were most likely to state that Titanic Belfast exceeded expectations.

- More than 7 in 10 visitors also stated that Titanic Belfast is the type of attraction they would visit again.

- Proximity to the attraction clearly influences the likelihood of revisiting, visitors from North America and other overseas countries were much less likely to agree they would revisit.
Advocacy & social media

Base: All visitors (n=1209)

- Advocacy ratings were very positive with visitors from NI and RoI most likely to be the strongest advocates of Titanic Belfast.
- Younger visitors were much more likely to comment about Titanic Belfast on social media.
- Big opportunity to harness visitors positive experiences at Titanic Belfast on social networking sites and further promote the attraction to a global audience.
Conclusions & recommendations
Conclusions & recommendations

- Titanic Belfast attracts visitors from all over the world and appeals to various visitor segments.

- Only a small proportion of visitors bought children to the attraction which is partly reflective of the high proportion of visitors the attraction welcomes from outside NI.

- A perception exists that the attraction is not suitable for younger children. Titanic Belfast has an Education Team and significant budget has recently been spent on the Ocean Exploration Centre to make it more child friendly and to attract more family events, e.g. the Brick City ‘LEGO’ exhibition.

- The majority of visitors decided to visit before leaving home and cited the Titanic Belfast as the main or very important reason for visiting so it is evident that the attraction is a demand generator bringing out-of-state visitors into NI and domestic tourists into Belfast.
Conclusions & recommendations

- Titanic Belfast also has significant influence in encouraging out-of-state visitors to stay overnight both in Belfast and in the rest on NI (less so for RoI). Opportunity to work with stakeholders to create and promote Titanic Belfast packages incorporating hotel offers, combined tickets for other attractions and promote the ever growing programme of events taking place in the city every year. This could encourage longer stays and also convince potential day trippers to stay overnight.

- Less than two fifths of visitors were aware of the Tourist Information Discovery Point, however the majority of visitors who were aware of the facility and made use of it were satisfied with the experience. There is a clear opportunity to increase awareness and usage of the Tourist Discovery Point which is currently being addressed through a review of the design of the space and content provided.

- Overall awareness of other Titanic related attractions was low and this highlights the need for further promotion of other attractions through joint ticketing opportunities and cluster packaging.
Conclusions & recommendations

• Titanic Belfast is hugely appealing to a wide spectrum of visitor types. Essentially, Titanic Belfast and the other attractions in the Titanic Quarter should be promoted as part of the wider Belfast experience.

• The tour group market is significant for Titanic Belfast so it is essential that all possible opportunities and partnerships are explored with tour operators in RoI and any other countries with tour operators which regularly utilise direct ferry routes onto the island of Ireland.

• Visitors arrive in Titanic Belfast by a range different transport methods so it is essential that clear orientation guides and maps signposting other attractions and facilities in the area are readily available.

• The utilisation of the audio guide is much lower than at the Giant’s Causeway which include it as part of the ticket price. An opportunity exists to raise awareness and further promote audio guides to visitors.
Conclusions & recommendations

- Almost all visitors to Titanic Belfast left as advocates and a significant proportion of visitors also stated that it was likely they would comment about the attraction on social media. It is important to harness these positive visitor experiences.

- Very positively, more than two thirds of visitors stated that Titanic Belfast exceeded their expectations and more than 7 in 10 visitors also stated that Titanic Belfast is the type of attraction they would visit again.