



REPORT

Food & Drink Survey

Tourism Northern Ireland

December 2016

Strategic Research and Insight Ltd
4 Park Court Mews
Park Place
Cardiff, Wales
CF10 3DQ
Tel: +44 (0)29 2030 3100

www.strategic-research.co.uk

1. Executive Summary

Very positive feedback on eating out in Northern Ireland

- 1.1 When asked to rate different aspects of Northern Ireland's food offering out of 5, all aspects rate higher than 4 out of 5 on average.
- 1.2 'Friendly and efficient service' is the highest rated aspect (4.4). The local aspects of the offering are also rated very well, with 'menus demonstrating the use of locally sourced ingredients' and 'opportunities to experience good local food & drink' both averaging 4.3.

The more important the food experience is, the more satisfied visitors are

- 1.3 A further positive finding is that visitors who place more importance on food experience give higher average ratings for Northern Ireland's offering. 'Value for money' is rated 4.5 on average by those for whom the food experience is the key focus of a break, and 4.2 by those who say that food experience is important. This compares to the average rating of 3.9 given by other respondents.
- 1.4 Similarly 'opportunities to experience good local food & drink' is rated 4.6 on average by those for whom the food experience is the key focus of a break, and 4.3 by those who say that food experience is important. This compares to the average rating of 4.0 given by other respondents.

Strong performance of establishments compared to expectations

- 1.5 Food & drink establishments in Northern Ireland are performing well, as in about two thirds (65%) of cases the establishment lives up to visitors' prior expectations.
- 1.6 Establishments are also more likely to live up to the expectations of non-NI residents (67% have answered 'definitely lived up to expectations'), and those for whom the food experience is a key focus of the break (80% have answered 'definitely lived up to expectations').

Quality of food also exceeds expectations

- 1.7 The average respondent has given their prior expectation of Northern Ireland's food a score of 4.0 out of 5 ('very good') but the actual experience 4.3 out of 5 (part way between 'very good' and 'excellent').

Some reviews being left, but opportunities being missed

- 1.8 One in ten (10%) respondents say they have left reviews relating to places they have eaten at in Northern Ireland, but most (90%) say they have not. Satisfaction is not quite as high among those who leave reviews. It seems that opportunities are being missed in that few of the most satisfied visitors are leaving reviews.

Low awareness of food & drink events in Northern Ireland this year

- 1.9 Only eleven non-NI respondents have stated that they were aware of some form of food or drink event this year. Some of these have not been able to answer the name of the event or were even perhaps confusing an official food and drink event with a promotion by a particular bar or restaurant.

Northern Ireland most associated with Ulster Fry

- 1.10 When asked unprompted to name one food or drink most associated with Northern Ireland, 26% of respondents have answered 'Ulster Fry'. 12% of respondents have stated potatoes, 7% Guinness and 5% each for soda bread and Irish stew.

2. Background and Methodology

Why has this research been commissioned?

- 2.1 Tourism Northern Ireland considers the food and drink offer as an important part of the visitor experience in Northern Ireland. 2016 was designated Northern Ireland's 'Year of food and drink'. A calendar of food themes was developed which provided visitors with opportunities to learn about, appreciate and consume food and drink that reflects the local regions, local produce and producers, artisans and their passion and creativity.
- 2.2 This year-long celebration aimed to improve the quality of the visitors' food and drink experiences, increase satisfaction and provide an opportunity to tell stories and build upon NI's reputation. The key objective of this research therefore was to measure visitor satisfaction with Northern Ireland's food & drink offering.

How has this research been conducted?

- 2.3 We have conducted 504 face-to-face interviews with visitors to/in Northern Ireland, with more focus placed on interviewing non-NI residents. Finding non-NI residents has proven to be more of a challenge outside of the tourism hotspots.
- 2.4 The sample breakdown by origin of respondent is as follows:

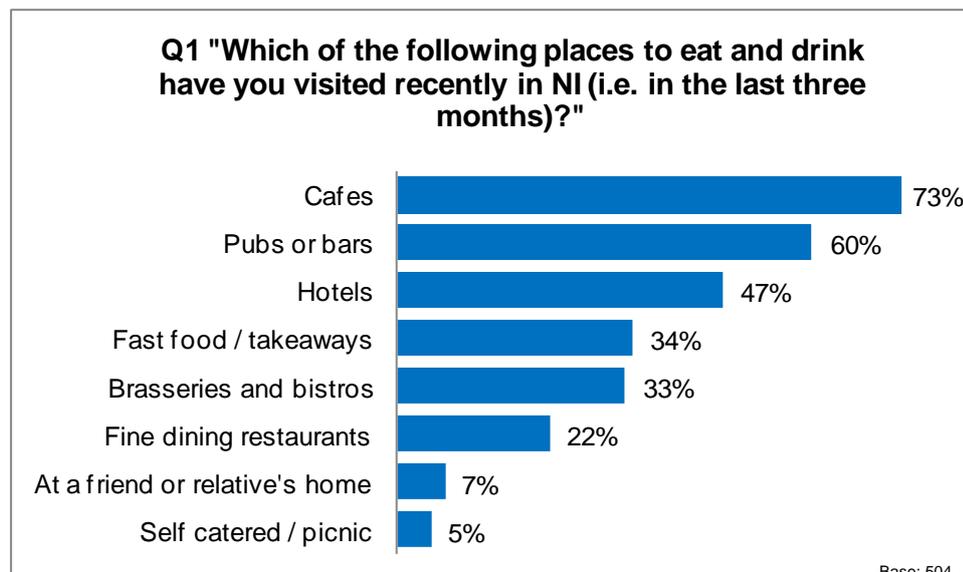
Country of origin	No. of respondents	% of sample
Republic of Ireland	49	10%
England	82	16%
Scotland	38	8%
Wales	4	1%
Northern Ireland	151	30%
Other Europe	57	11%
Rest of world	123	24%
Total	504	100%

- 2.5 Interviews have taken place between 10th October and 6th November 2016 at a range of locations across the country.
- 2.6 Interviews have been conducted using a structured questionnaire designed by SRI and TNI. A copy of the questionnaire is included as an appendix.

3. Research Findings

We have used early questions in the survey to tabulate answers by respondent group. Where answers between respondent groups differ significantly for any question, these differences are detailed in the report.

Types of establishment

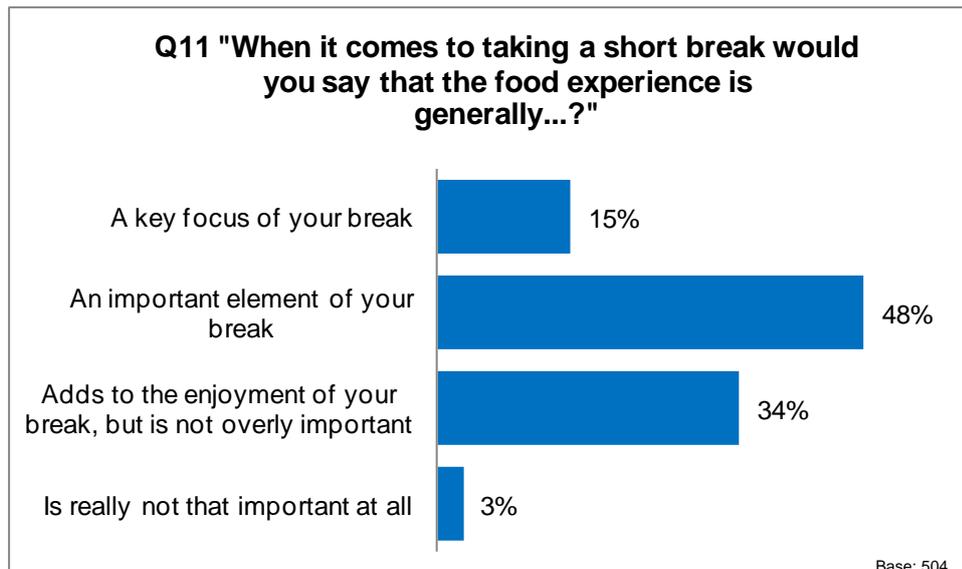


Respondents have been able to give more than one answer to the above question

A wide range of establishments form Northern Ireland's food and drink offering

- 3.1 Q1 has primarily been used as a filter question to ensure that only respondents who have done more than just eating at a friend or relative's home qualify for the full survey.
- 3.2 Nevertheless, the results show that there is a high level of visitor usage across a wide range of establishments contributing to Northern Ireland's food and drink offering. Fine dining is part of NI's offering, but it is far from being the only part.

Food experience as part of a break



The food experience is important to many visitors

- 3.3 The food experience is important to the majority (63%) of respondents when taking a short break. Some (15%) even say that is a 'key focus' of the break, and about a further half (48%) say it is an 'important element' of the break.
- 3.4 Respondent groups more likely to focus their break on the food experience include:
- Northern Ireland residents (20% have answered 'key focus')
 - Over 55s (21%)
 - Couples (19%)
- 3.5 The answers to Q11 are used as a break in the cross-tabulations (provided separately) for subsequent questions. In this report we highlight where answers differ significantly between these different attitudes groups.

Rating of eating out in Northern Ireland



Respondents have been asked to rate each aspect of Northern Ireland's offering out of 5, where '5' is excellent and '1' is poor. The above chart shows the average score for each aspect.

High satisfaction ratings with eating out in Northern Ireland

3.6 All aspects of Northern Ireland's offering tested in the survey rate higher than 4 out of 5 on average, with 'friendly and efficient service' rated highest (4.4). The local aspects of the offering are also rated very well, with 'menus demonstrating the use of locally sourced ingredients' and 'opportunities to experience good local food & drink' both averaging 4.3.

Satisfaction has improved since the previous survey

3.7 The table below shows that all attributes have seen an increase since the previous Tourism NI Visitor Attitude Survey in 2014.

Attribute	2014 Average Rating Score	2016 Average Rating Score	Average Score Increase
Friendly and efficient service	4.0	4.4	+0.4
Menus demonstrate locally sourced ingredients	3.5	4.3	+0.8
Opportunities to experience good local food & drink	3.6	4.3	+0.7
Value for Money	3.5	4.2	+0.7
Places to eat available at the times that suit you	3.6	4.2	+0.6
Information on places to eat and drink out	3.3	4.1	+0.8

*Average Rating Score out of 5, where '5' is excellent and '1' is poor

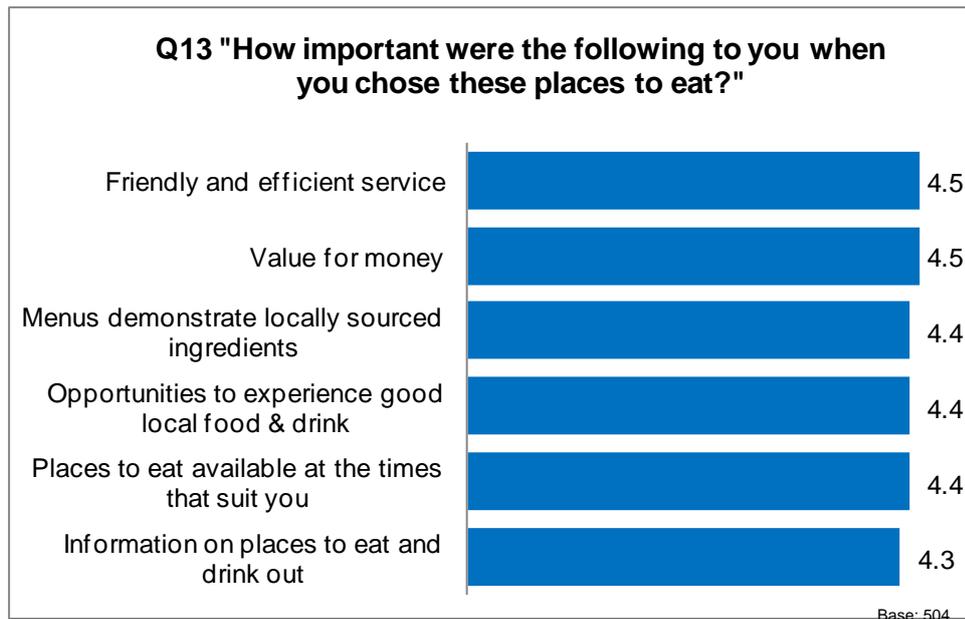
Ratings are higher among visitors outside the Island of Ireland

- 3.8 The average ratings for all six aspects of Northern Ireland's offering are higher among visitors from outside the Island of Ireland (IOI) (differences between NI and ROI respondents do not differ significantly from each other).
- 3.9 The most significant differences in average rating are for:
- Value for money (4.3 average for non-IOI respondents vs 3.9 average for IOI respondents)
 - Places to eat available at the times of day and night that suit you (4.3 vs 3.9)
 - Information on places to eat and drink out (4.2 vs 3.8)

The more important the food experience is, the more satisfied visitors are

- 3.10 A further positive finding here is that visitors who place more importance on food experience give higher average ratings for Northern Ireland's offering.
- 3.11 'Value for money' is rated 4.5 on average by those for whom the food experience is the key focus of a break, and 4.2 by those who say that food experience is important. This compares to the average rating of 3.9 given by other respondents.
- 3.12 Similarly 'opportunities to experience good local food & drink' is rated 4.6 on average by those for whom the food experience is the key focus of a break, and 4.3 by those who say that food experience is important. This compares to the average rating of 4.0 given by other respondents.
- 3.13 'Friendly and efficient service' is rated 4.7 on average by those for whom the food experience is the key focus of a break, and 4.5 by those who say that food experience is important. This compares to the average rating of 4.2 given by other respondents.
- 3.14 'Menus demonstrate the use of locally sourced ingredients' is rated 4.5 on average by those for whom the food experience is the key focus of a break, and 4.4 by those who say that food experience is important. This compares to the average rating of 4.0 given by other respondents.

Choosing a place to eat



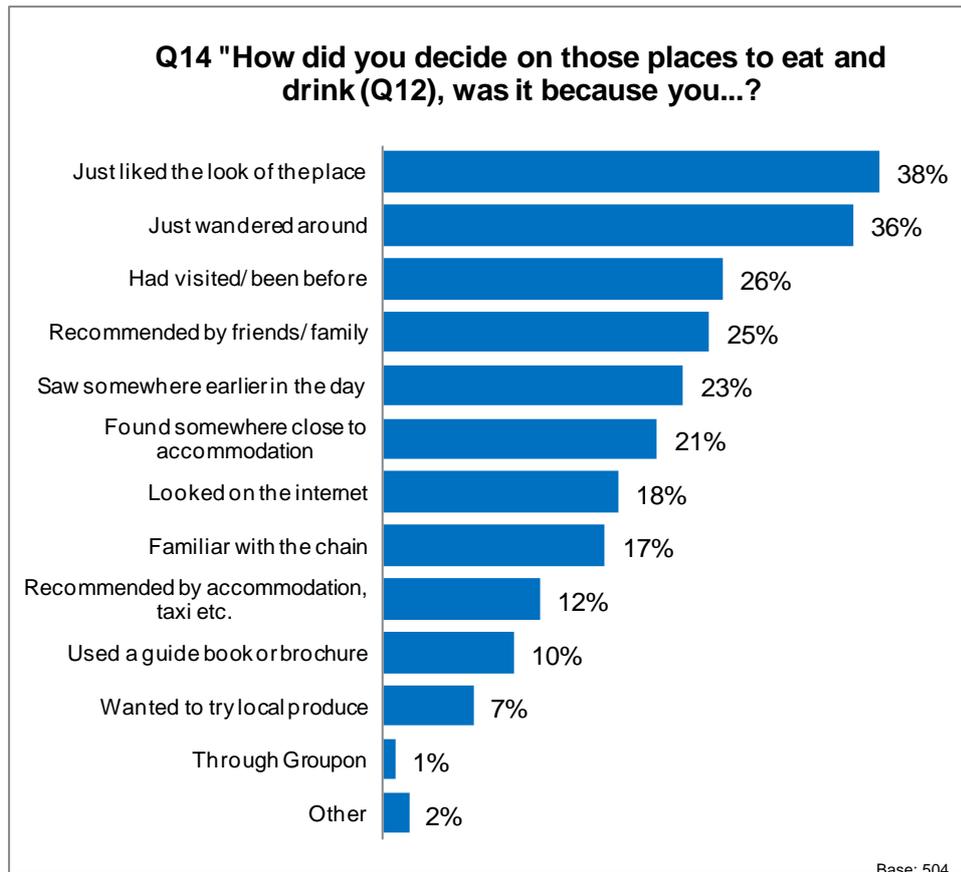
Respondents have been asked to rate each aspect of Northern Ireland's offering out of 5, where '5' is very important and '1' is 'not important'. The above chart shows the average score for each aspect.

Northern Ireland well rated on important factors

- 3.15 All of the following factors in choosing a place to eat are given a high level of importance: friendly and efficient service, value for money, menus demonstrate locally sourced ingredients, opportunities to experience good local food & drink, places to eat available at suitable times, and information on places to eat and drink out.
- 3.16 It is positive therefore that Northern Ireland is well rated on all of these factors (discussed earlier under Q12). Most notably, 'friendly and efficient service' is the joint top highest priority for respondents, and this is the aspect which Northern Ireland rates highest on (4.4).

The more important the food experience is, the more important all the decision-making factors are

- 3.17 Visitors who place more importance on food experience give higher average ratings for every factor in the decision. Those for whom the food experience is the 'key focus' of a break rate every decision-making factor at least 4.7 out of 5 on average, with particular importance placed on 'friendly and efficient service' (4.9).



Many food & drink establishments are just ‘stumbled upon’

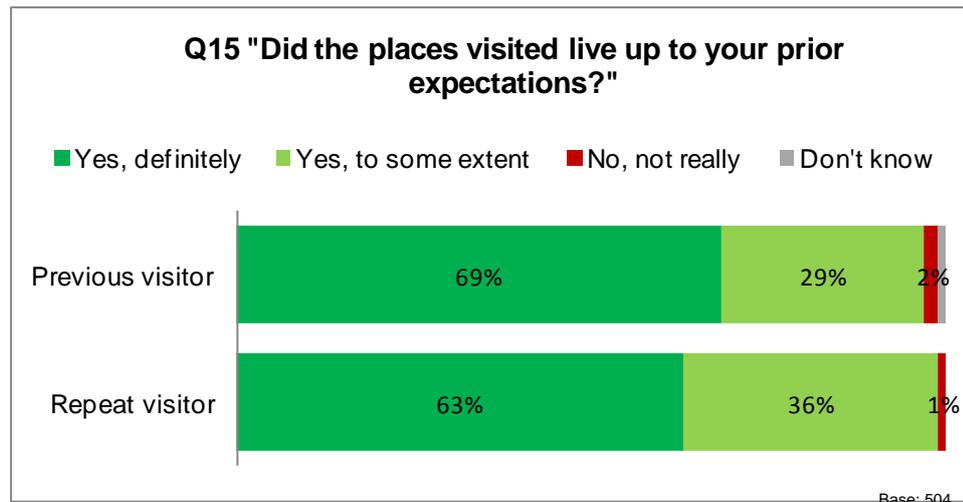
3.18 The decision on where to eat or drink can depend on a variety of reasons, the most frequent ones being ‘just liked the look of the place’ (38%) and ‘just wandered around’ (36%). More purposeful searching such as on the internet (18%) and in a ‘guide book or brochure’ (10%) is less common.

Previous experience is the top answer for NI residents and previous visitors to the area

3.19 ‘Had been before’ is the most frequent answer given by NI residents (62%) and previous visitors to the area of interview (58%). ‘Recommendations by friends / family’ is the second most frequent answer among NI residents (52%) and previous visitors to the area (49%).

3.20 In contrast, new visitors to an area seem to do a lot of wandering around – the most frequent method of finding a place to eat or drink (43%).

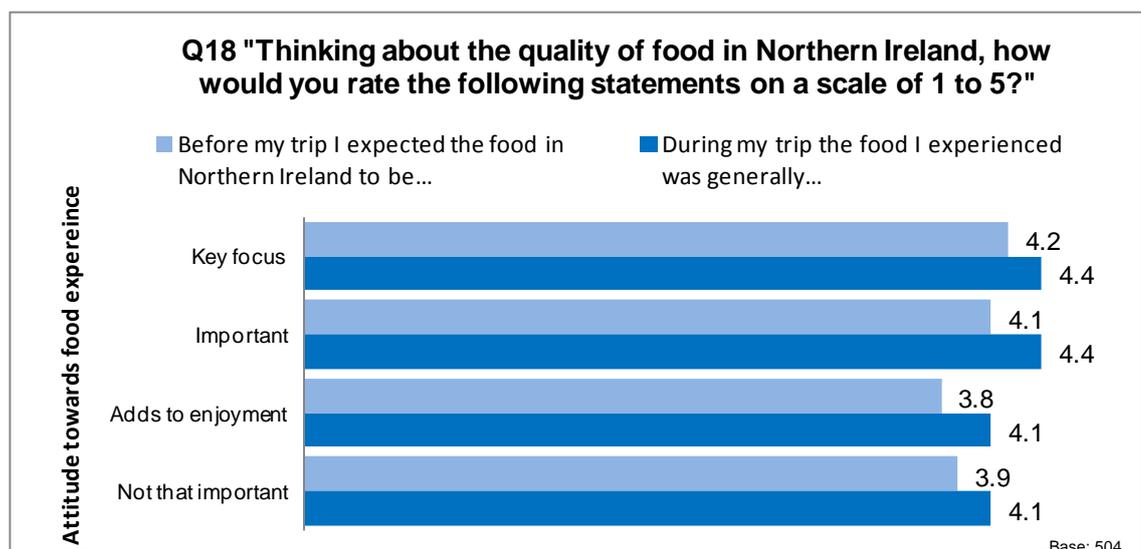
Experience compared to expectations (places)



Strong performance compared to expectations

- 3.21 Food & drink establishments in Northern Ireland are performing well, as in about two thirds (65%) of cases the establishment lives up to visitors' prior expectations. There is some difference in answers by previous / repeat visitors to the area, shown on the above chart.
- 3.22 Establishments are also more likely to live up to the expectations of non-NI residents (67% have answered 'definitely'), and those for whom the food experience is a key focus of the break (80% have answered 'definitely').

Experience compared to expectations (food)



Respondents have been asked to rate their prior expectation and actual experience of food in Northern Ireland offering out of 5, where '5' is excellent and '1' is poor. The above chart shows the average score for each statement by type of respondent.

Quality of food exceeds expectations

- 3.23 The average respondent has given their prior expectation of Northern Ireland's food a score of 4.0 out of 5 ('very good') but the actual experience 4.3 out of 5 (part way between 'very good' and 'excellent').
- 3.24 Prior expectations and actual experiences correlate with respondents' attitudes towards the food experience on a break – the more important food is to a visitor, the higher the expectation and the experience. Those who place food as the 'key focus' of a break make a trip to/in Northern Ireland expecting the food to rate 4.2 but rate their experience 4.4.
- 3.25 There are no significant differences in the answers to this question by origin of visitor or new/repeat visitors to the area.

Comparisons with other destinations

- 3.26 Respondents have been asked an open question, *"How do these places in Northern Ireland compare with other destinations – is there anything unique about Northern Ireland's food and drink offering? If so, what?"*
- 3.27 While the majority of respondents have stated that they don't know, some respondents simply say that the food offering is good or excellent. The next most common answer is that the food and drink offering is as good as other places.
- 3.28 Others have commented on the use of local produce, the food being fresh and the customer service being very good or better than elsewhere.

"Food is fresh and local"

25-34, Male, Northern Ireland

"Good local beers"

45-54, Male, England

"Good use of local produce"

65+, Female, Northern Ireland

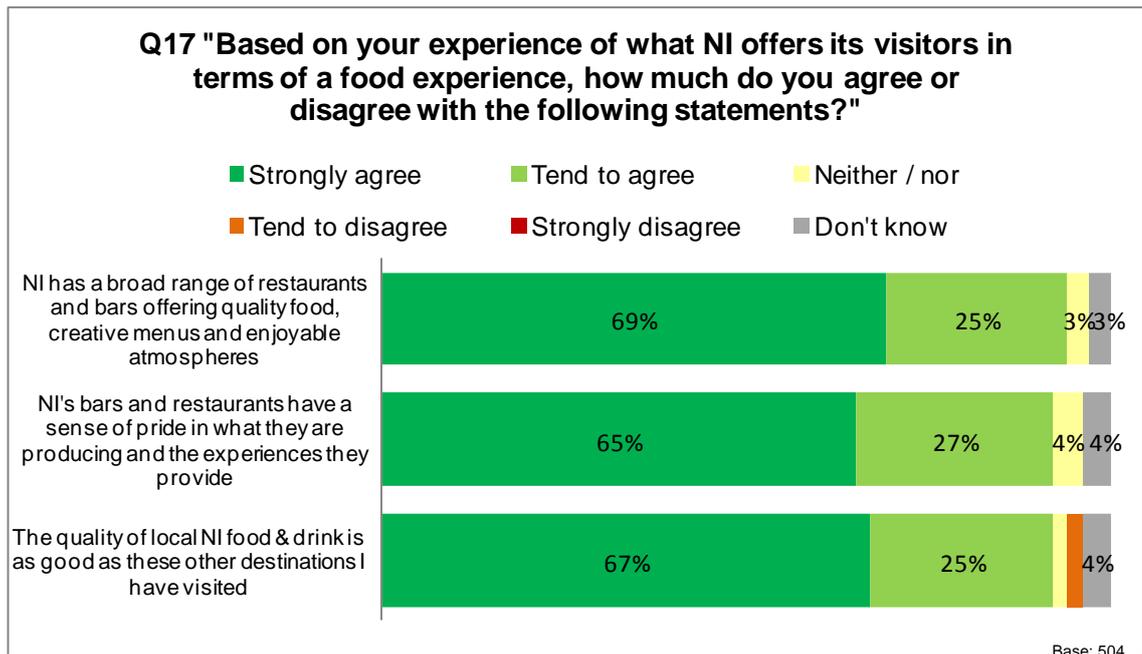
"Better customer service"

45-54, Male, England

"Friendly atmosphere at venues"

45-54, Female, England

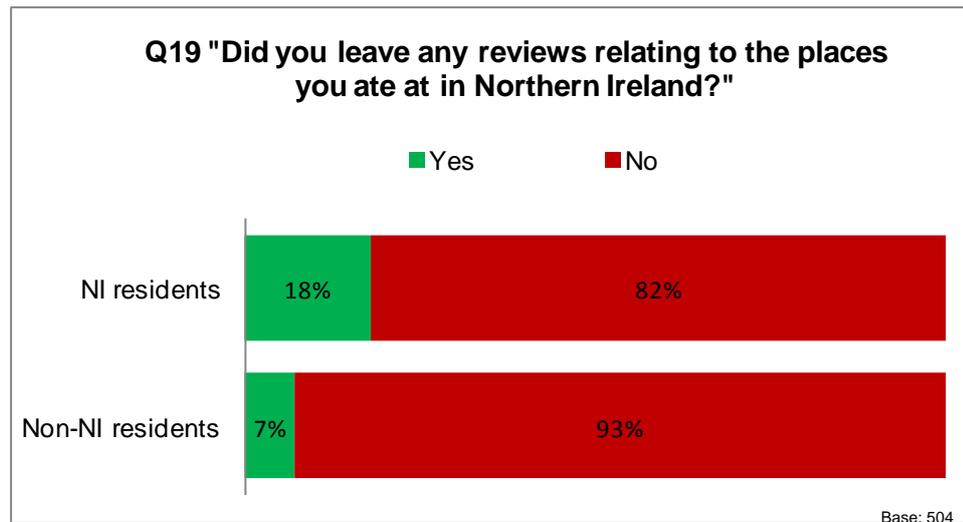
Perceptions of Northern Ireland's offering



Strong perceptions of Northern Ireland's food experience

- 3.29 Perceptions of Northern Ireland's food experience are very positive, with approximately two thirds of visitors strongly agreeing with each of the above statements.
- 3.30 The most significant difference in answers between NI and non-NI residents is in response to the statement '*Northern Ireland has a broad range of restaurants and bars offering quality food, creative menus and enjoyable atmospheres*'. The majority (72%) of non-NI residents strongly agree with this statement, compared to a lower proportion (63%) of NI residents.

Leaving reviews



Some reviews being left, but opportunities being missed

- 3.31 Following very positive results about the food experience in Northern Ireland, it would help if these experiences transferred into reviews on sites such as Trip Advisor.
- 3.32 One in ten (10%) respondents say they have left reviews, but most (90%) say they have not.

Satisfaction not quite as high among those who leave reviews

- 3.33 A slightly concerning break in results to Q19 is that those who have left reviews have generally not been as satisfied with their experience as those who have not left reviews. For example, those leaving reviews have (in Q12) rated the value for money of eating out in Northern Ireland as 3.8 out of 5 on average, compared to 4.2 among those who have not left reviews.

Improving the experience

- 3.34 Respondents have been asked the open question, 'What, if anything, could improve the food and drink experience in Northern Ireland?'. While the majority have not been able to make a constructive suggestion, the remaining respondents have commented on prices, better choice of establishment, more promotions and longer opening times.

"Lower prices"

16-24, Female, Scotland

"Greater choice and variety of venues"

25-34, Male, Argentina

"More child friendly venues"

25-34, Male, England

“More traditionally Irish food/ venues”
35-44, Female, Scotland
“Later opening times”
16-24, Male, USA
“More/better advertising of offers / promotions”
35-44, Female, Scotland

Awareness of food and drink events in Northern Ireland

- 3.35 Respondents have been asked the open question, ‘*Are you aware of any food or drink events in Northern Ireland this year?*’. Two respondents have mentioned the ‘Year of Food and Drink’ specifically:

“Year of Food and Drink”
25-34, Male, England

“Year of Food in Northern Ireland”
25-34, Male, England

- 3.36 The most common response is the Good Food Show in Belfast; however, the majority of these respondents are from Northern Ireland. Indeed only eleven non-NI respondents have stated that they were aware of some form of food or drink event. Furthermore, some of these have not been able to answer the name of the event or were even perhaps confusing an official food and drink event with a promotion by a particular bar or restaurant.

Food associated with the regions of the UK and Ireland

- 3.37 Respondents have been asked the open question, ‘*Can you name one food and/or drink that you would most associate with the following countries: England, Scotland, Wales, Northern Ireland and the Republic of Ireland?*’.

Northern Ireland – Ulster Fry

- 3.38 Respondents most associate Northern Ireland with an Ulster Fry, with 26% stating Ulster Fry or something similar. 12% of respondents have stated potatoes, 7% Guinness and 5% each for soda bread and Irish Stew. A relatively low proportion (14%) of respondents have answered ‘don’t know’ – this is the lowest proportion answering ‘don’t know’ of any of the five countries tested.

Republic of Ireland – Guinness and Irish stew

- 3.39 Respondents most associate the Republic of Ireland with Guinness (21%), with 18% stating an Irish stew and 11% stating potatoes.

England – Fish and chips and roast beef

- 3.40 The top answer for England is ‘fish and chips’ or ‘chips’ or ‘fish’ (22% of respondents), with ‘roast beef’ or ‘roast dinner’ a fairly close second with 15%.

Scotland – Haggis

3.41 Haggis is clearly identified as the food most associated with Scotland, with 56% of respondents giving this answer.

Wales – Leeks

3.42 Wales is most associated with leeks, with 17% of respondents stating this response. The food & drink offering in Wales is not well known, as 60% have answered 'don't know' to Wales.

4. Conclusions from the Research

- 4.1 Here we conclude with the implications for Tourism Northern Ireland and the trade.

Northern Ireland has strong potential to become a recognised food destination

- 4.2 Northern Ireland's food & drink offering is very well rated by visitors. Encouragingly, the more important the food experience is on a break, the more satisfied the visitor is with Northern Ireland's offering. Experiences also consistently exceed expectations, which are already high.
- 4.3 These findings put Northern Ireland in a strong position to continue to develop towards becoming a recognised food destination.

The importance of food & drink on a break means that the trade in this sector have a key role to play in tourism

- 4.4 As food & drink is important to the majority of visitors when on a break, the providers have a key role to play in the visitor experience to Northern Ireland.
- 4.5 This suggests that tourism authorities should continuously communicate with the food & drink trade to remind them of the important role they play in tourism. It also suggests that on-going communication to trade on the importance of meeting visitor expectations for experiencing local food & drink alongside along with a friendly and efficient service should bring rewards in delivering an enriched overall visitor experience.

More reviews needed from the most satisfied visitors however

- 4.6 The high levels of satisfaction could transfer better into reviews being left. Reviews are more likely to be left by visitors whose satisfaction is not as high, and the industry may benefit from more of the highly satisfied visitors leaving reviews. The trade could encourage this.

Friendly & efficient service and local aspects of the offering are key messages to push

- 4.7 Food & drink is clearly a key part of Northern Ireland's tourism offering given the high levels of satisfaction. Within this, the friendly and efficient service visitors are likely to receive is a key promotional message as it is the highest rated aspect of the offering and the joint most important factor when choosing a place to eat.
- 4.8 Similarly, good local sourcing and value of money are also key messages to promote.
- 4.9 It is also important however that ongoing monitoring is in place to ensure that the trade in Northern Ireland continues to deliver highly on these aspects which are important to visitors. Returning visitors may have high expectations on Northern Ireland's food & drink offering, having felt

satisfied in previous visits. Such monitoring could help to ensure that high standards are maintained and strong expectations are met.

Appearance matters a lot

- 4.10 Many visitors to Northern Ireland seem to just 'stumble' across places to eat either through wandering around or simply 'liking the look of a place'. This emphasises the importance of establishments investing in the upkeep of their physical appearance.

A wide range of establishments contribute to Northern Ireland's food and drink offering

- 4.11 Results show that there is a high level of visitor usage across a wide range of establishments contributing to Northern Ireland's food and drink offering. Fine dining is part of NI's offering, but it is far from being the only part. Therefore key industry messages need to be communicated across the full range of food & drink establishment types.

Low awareness of food and drink events this year, but this can be built on

- 4.12 Only a very small proportion of respondents were aware of the Year of Food & Drink or any kind of food event in Northern Ireland this year.
- 4.13 However, the trade are evidently providing a very good service, and visitors are very satisfied with the offering. The 'Year of Food & Drink' initiative might be an underlying factor behind this without visitors necessarily knowing it. What matters most is the experience of the visitors, and on the evidence of this research, that experience is very positive.