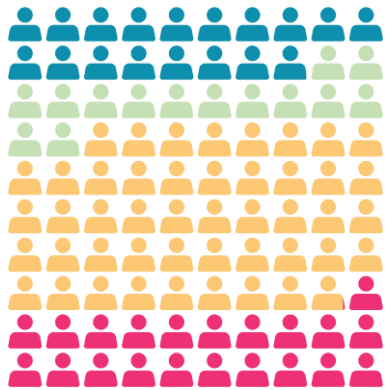


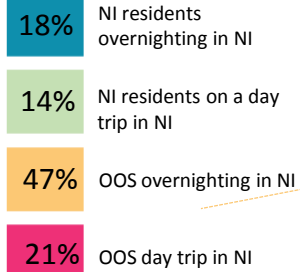
FERMANAGH & OMAGH

TNI's Visitor Attitude Survey (2018)* reports that Fermanagh & Omagh is a popular overnight and day trip destination for both out of state (OOS) and domestic leisure visitors. The area attracts a higher than average proportion of Northern Ireland (NI) overnights, and welcomes the highest proportion of Republic of Ireland (ROI) visitors of all the areas.

The attractions and scenery were key motivations for visiting Fermanagh & Omagh, with participation in water sports and outdoor activities higher relative to many other areas in NI.



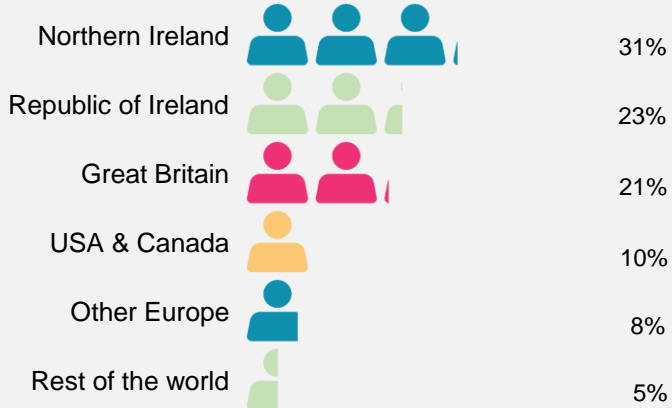
LEISURE VISITORS TO AREA



69%

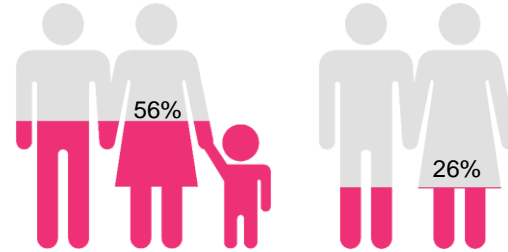
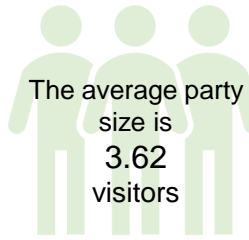
69% of visitors from out of state.

ORIGIN OF THOSE VISITING DESTINATION



PARTY TYPE

The majority of visitors (56%) travelled as a family, whilst 26% of visitors travelled as a couple. 8% travelled as a group of adults, 8% were on a tour, and 2% of visitors travelled alone.



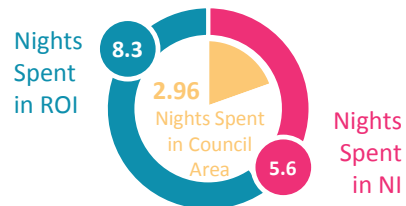
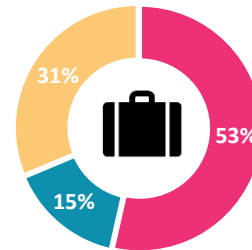
Of which 28% overnights in the area and 19% overnights elsewhere in NI

83% of OOS visitors decided to visit Fermanagh & Omagh before arriving in NI.

53% of OOS visitors were visiting NI for the first time.

VISITING THE REPUBLIC OF IRELAND

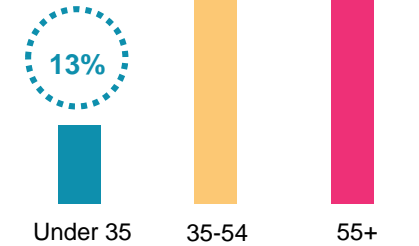
- Overnight Trip to ROI
- Day Trip to ROI
- No Trip to ROI



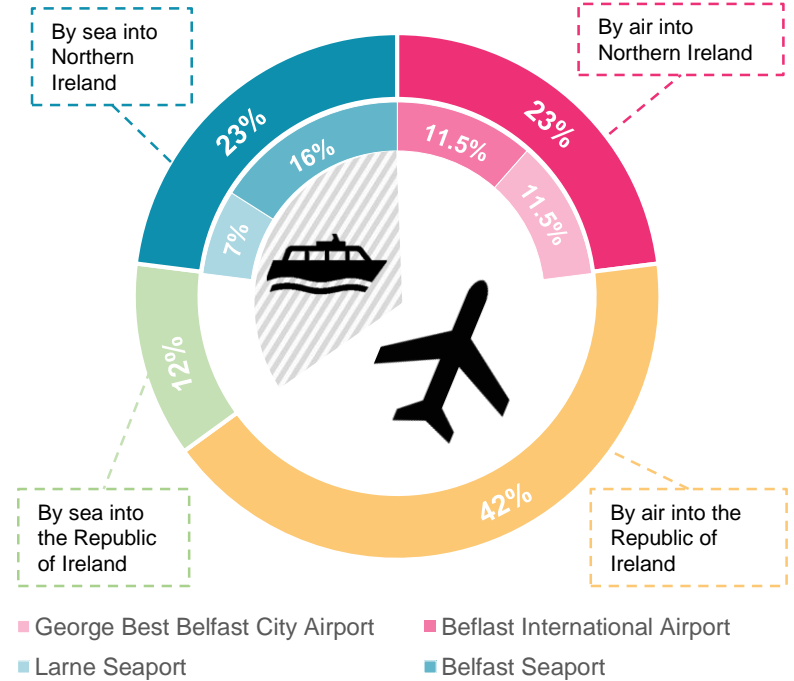
69% of those from outside NI/ROI who visited this area also visited the ROI.

AGE

With a more family oriented visitor profile, Fermanagh & Omagh attracts a slightly larger 35-54 age group than the NI average



MEANS OF TRANSPORT INTO THE ISLAND OF IRELAND



*SOURCE: Tourism Northern Ireland: Visitor Attitude Survey 2018, Cognisense Ltd. Total Base: n=302

AREAS AND ATTRACTIONS ALSO VISITED IN NI

Attractions that influenced leisure visitors to come to Northern Ireland



39%
Giant's Causeway



24%
Derry-Londonderry



29%
Causeway Coastal Route



22%
Belfast City

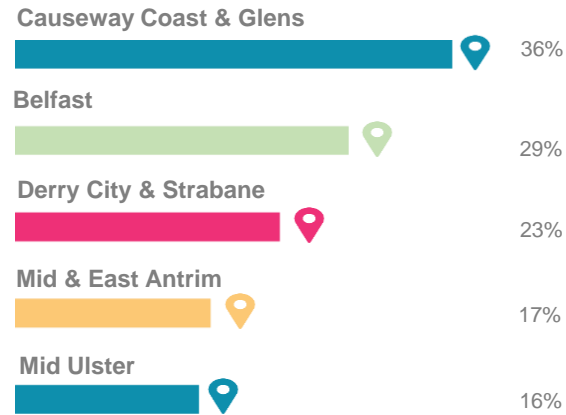


24%
Titanic Belfast



5%
Game of Thrones locations

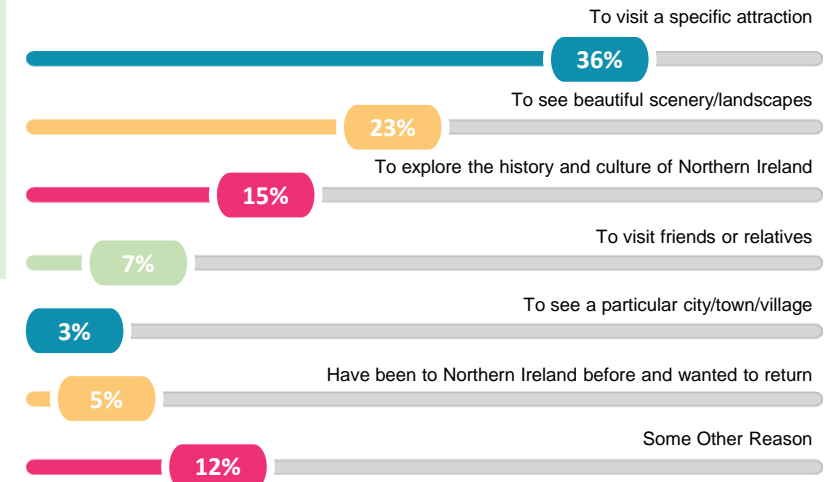
TOP 5 OTHER AREAS VISITED



MOST IMPORTANT REASON FOR VISITING THE AREA

The main reason for visiting Fermanagh & Omagh was "to visit a specific attraction" (36%), with around two fifths of visitors to the area visiting the Ulster American Folk Park and Marble Arch Caves

The scenery/landscapes were another key motivator for visiting this area, as was uncovering the history/culture.



GETTING AROUND THE AREA



= Significantly higher than the average for all areas

= Significantly lower than the average for all areas

7.27
OVERALL SATISFACTION SCORE

(Average score on scale from 0-10)

Signposting for exploring the area by foot 6.68

Places by the road to stop while driving and view the landscape 6.59

The welcome was a highlight for leisure visitors to Fermanagh & Omagh. However they scored the quality of the roads and roadside viewing bays, as well as signposting for discovering the area by foot, below the NI average.

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

Base: n=302

PLANNING & INFORMATION

PLANNING TIMESCALE FOR NI

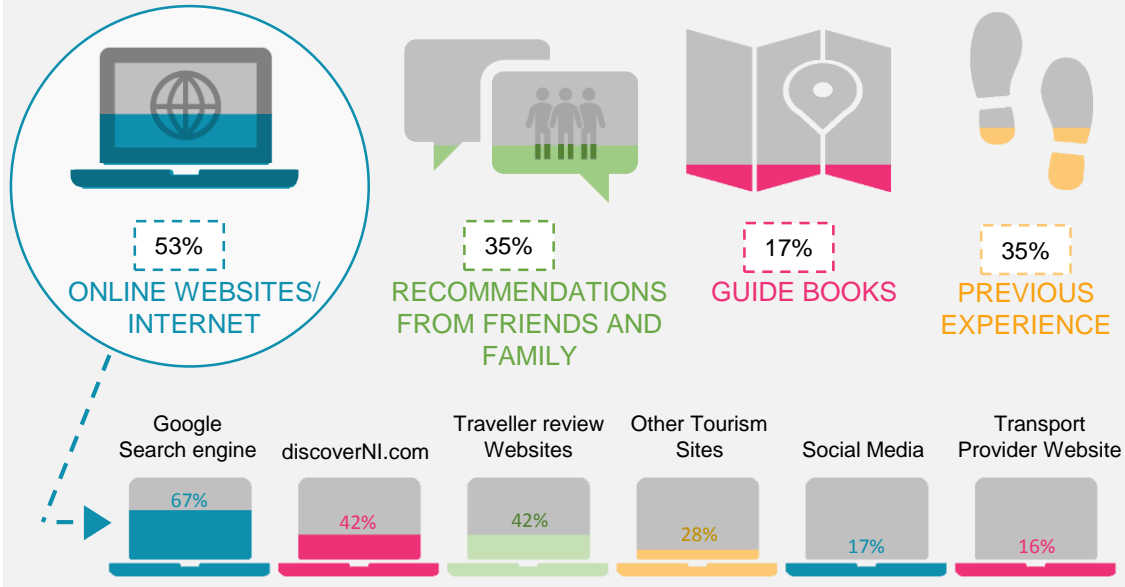
OOS leisure visitors began booking and planning their trip...



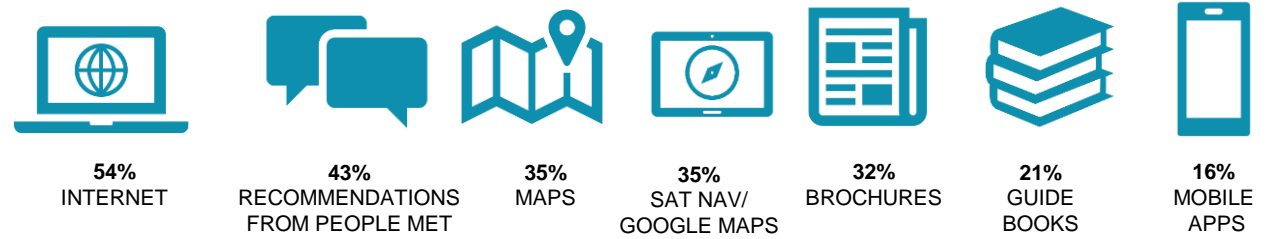
Digital connectivity in this area is poorer than anywhere else in NI.

Visitors found it easy to plan and book their trip overall. The internet is an important information source used when in NI and, as visitors scored Fermanagh and Omagh's digital connectivity at 6.56, this aspect requires attention.

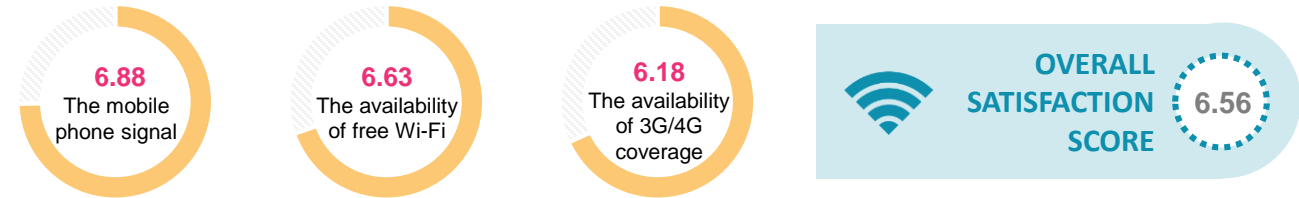
PRE-TRIP PLANNING RESOURCES



INFORMATION RESOURCES USED WHILST IN NI



DIGITAL CONNECTIVITY

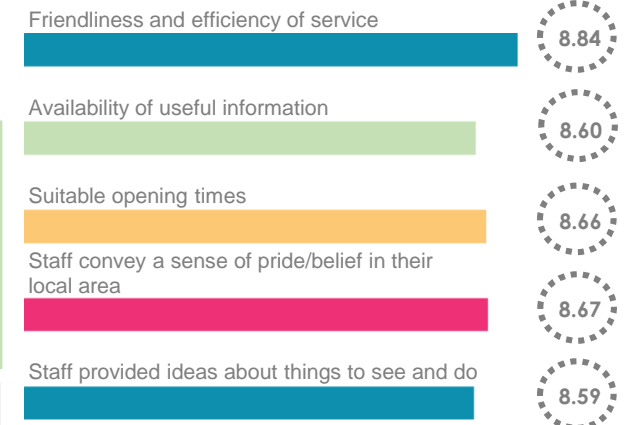


VISITOR INFORMATION CENTRES

30%† had visited a Visitor Information Centre on their trip to Northern Ireland. 21% had visited a Visitor Information Centre in the area.

35% received information which encouraged them to visit other areas in Northern Ireland they had not planned to visit.

11% received information which encouraged them to stay longer in the area.



8.67 OVERALL SATISFACTION SCORE

SOURCE: Tourism Northern Ireland: Visitor Attitude Survey 2018, Cognisense Ltd.
Base: n=302

†A proportion of emails were collected at Visitor Information Centres

ACCOMMODATION



40%
Hotel

Hotels were the most popular choice for leisure visitors to Fermanagh & Omagh. This area had the joint highest proportion of visitors using self-catering accommodation.



25%
Self-Catering

23% of all guest houses, B&Bs and self-catering accommodation was booked through Airbnb.



17% Stay with Family/Friends

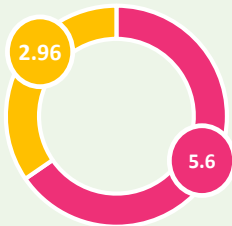


15%
Guest House/
B&B



7%
Camping/
Static
Caravan

Nights Spent in Council Area



Nights Spent in NI

PLACES TO EAT

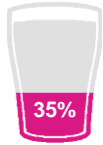


OVERALL SATISFACTION SCORE

7.41



Cafes



Pubs/Bars

Most Popular types of places to eat



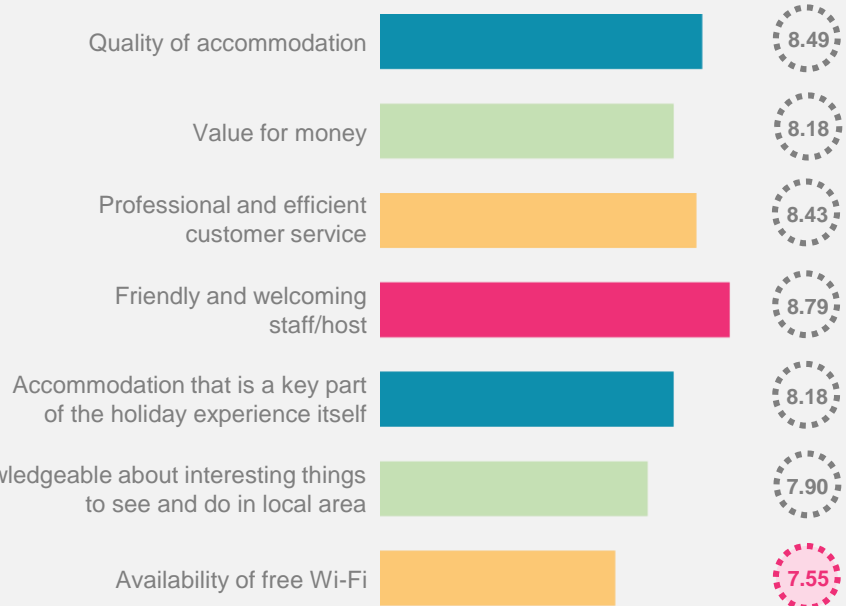
Relative to other areas of NI, visitors to Fermanagh & Omagh were less satisfied with their eating out experiences, e.g. in terms of the information available on places to eat out, menus referencing local ingredients, the range of establishments and opening times.

82% of visitors with children said that the places to eat are "family friendly for children of all ages".



ACCOMMODATION RATINGS

79% of visitors with children described the accommodation available as "family friendly for children of all ages".



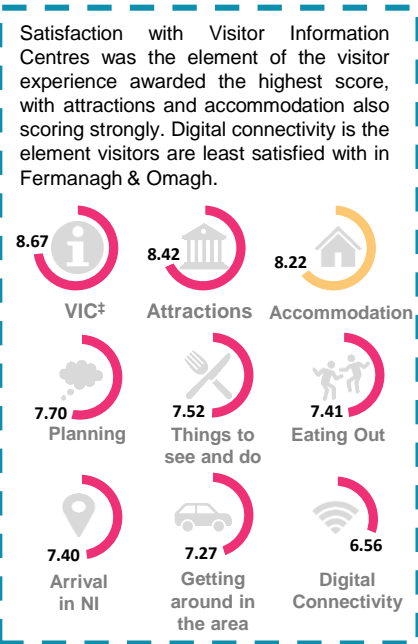
8.22

OVERALL SATISFACTION SCORE



92% of visitors said that the quality of the accommodation they stayed in exceeded or met their expectations. Expectations were greatly exceeded for 16%.

85% of visitors strongly agreed that they were able to stay in their preferred type of accommodation. Only 2% were not.



*Visitor Information Centre

SOURCE: Tourism Northern Ireland: Visitor Attitude Survey 2018, Cognisense Ltd.
Base: n=302

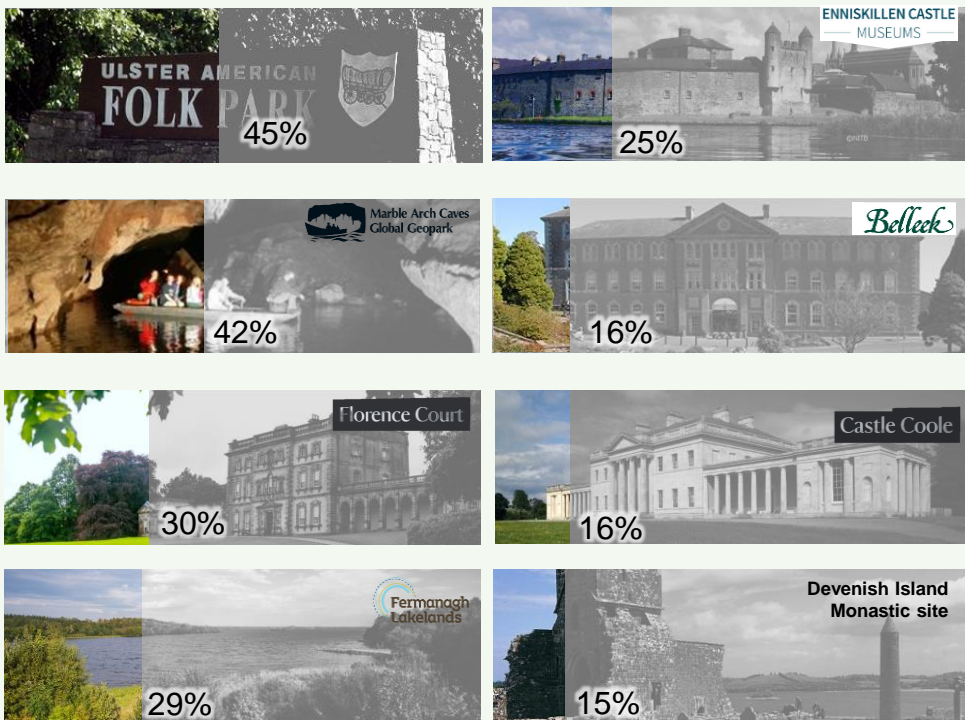
ATTRACTIONS & ACTIVITIES

The attractions are a key motivator for driving visitors to Fermanagh & Omagh. Those visiting the area are most likely to have gone to the Ulster American Folk Park, Marble Arch Caves, the lakes and/or Florence Court. Overall, attractions scored highly, with the interaction with staff a highlight.

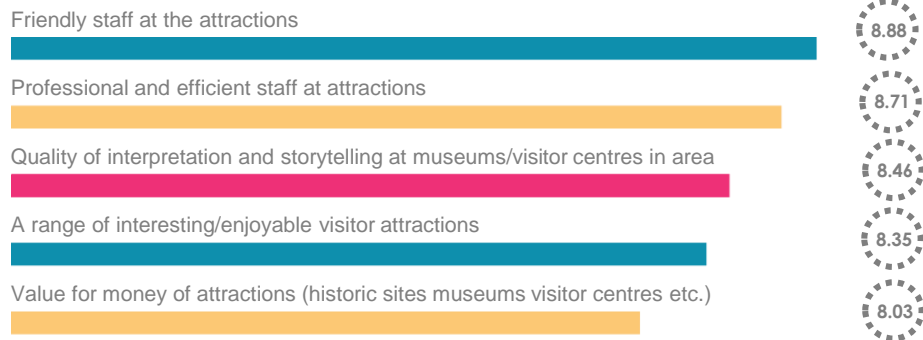
86% of visitors with children said that the attractions are “family friendly for children of all ages”.



TOP ATTRACTIONS VISITED IN THE AREA



RATINGS OF ATTRACTIONS IN THE AREA



8.42

OVERALL SATISFACTION SCORE



RATINGS OF THINGS TO SEE & DO IN THE AREA



OVERALL SATISFACTION SCORE

7.52



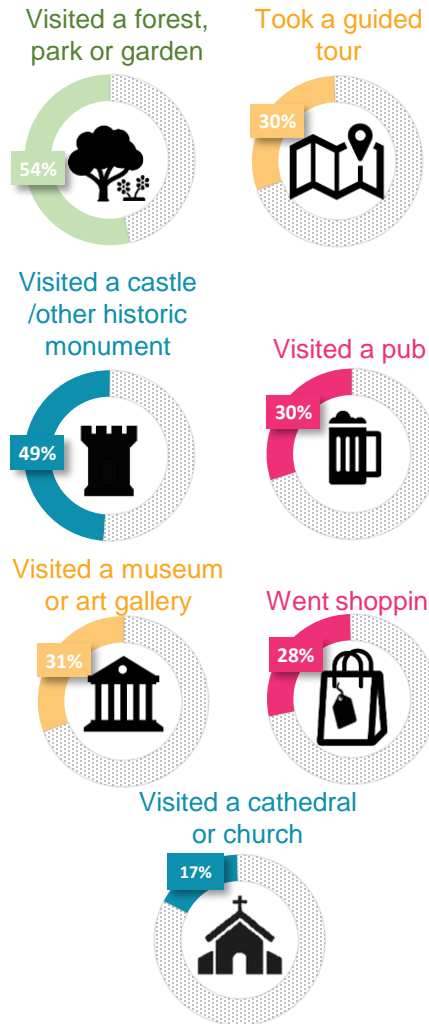
7.40
Satisfaction with cleanliness in the area

7.95
Cleanliness and availability of public toilets in the area

8.41
Satisfaction with safety in the area

SOURCE: Tourism Northern Ireland: Visitor Attitude Survey 2018, Cognisense Ltd.
Base: n=302

THINGS SEEN AND DONE



73% of visitors with children said that the things to do and see in the area are “family friendly for children of all ages”.



BEST EXPERIENCES IN THE AREA

A standout moment amongst some lovely ones: first night we were having a wander waiting for the trad music session in one of the pubs. Looking for an ATM, a local lady stopped her car and asked if we were lost and could she help. Brilliant.

A lot of interaction between the people who were working at the exhibits helped us understand the story of immigration fully.

Staff at [attraction] genuinely care about disabled visitors. They could not have done enough to help us. The staff here are exceptional.

The people - everywhere we went museums, cafes, bars, etc. everyone was very friendly & made you feel welcome, they couldn't do enough for you.

We rated the Marble Arch Caves second to none.

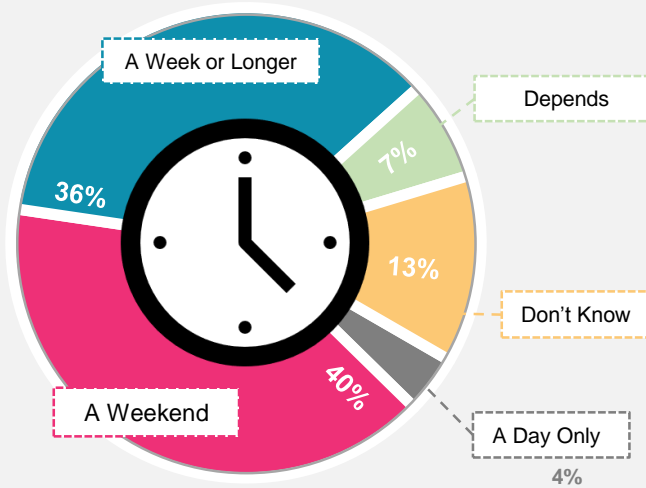
We enjoyed the local scenery and watching for wildlife. There were plenty of walks and cycle rides to complete on quiet roads. It was the beauty and feel of spaciousness that we took home with us.

We had an excellent holiday discovering the border area. The area is full of friendly, wonderful people with lots for everyone.

Very helpful, informative, and friendly staff at [attraction]. Nice walk to waterfall to help pass time as we waited for our trip to commence.

IS THERE ENOUGH TO DO IN THE AREA

Leisure visitors think there is enough to do in the area for...



There was enough to do in all weather conditions

7.22

There was enough to do in the evenings

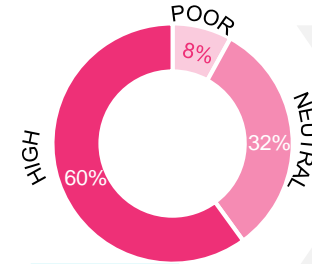
6.64

There was enough to do on Sundays

6.55

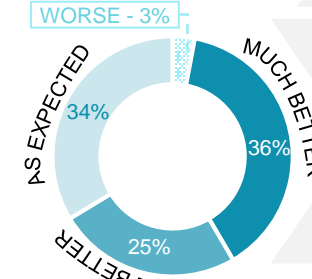
Fermanagh & Omagh's evening and Sunday offering is rated lower than many other NI areas.

DESTINATION EXPERIENCE



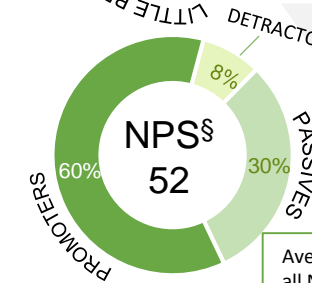
OVERALL EXPERIENCE

60% of visitors rate their experience in this area highly. 32% are more neutral about their experience and only 8% would regard their experience in the area as poor.



EXCEEDING EXPECTATIONS

36% of visitors said the trip to the area was "much better than expected". 59% said it was around the same or slightly better and only 3% said it was "worse than expected".



RECOMMEND AREA TO FAMILY AND FRIENDS

60% of visitors would definitely recommend this area. 30% are more neutral and 8% would not recommend the area.

NPS[§]
52

Average NPS for all NI council areas was 58

Fermanagh & Omagh was most likely to be seen as having enough to do for a weekend. Over one third felt there was enough to do in the area for a week or longer.

Overall, visitors enjoyed their experience of Fermanagh & Omagh and it exceeded expectations for over three fifths of visitors.

[§](NPS) = Net Promoter Score®

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

Base: n=302

FERMANAGH & OMAGH

	MEASURE	FERMANAGH & OMAGH	NORTHERN IRELAND	
PLANNING & BOOKING	7.70	The availability of useful information to help you to plan your trip	8.16	8.14
		The availability/ease of finding information about the different regions within Northern Ireland	8.04	8.11
		Ease of finding information on the area	8.15	8.27
		Ease of finding information on things to see and do in Northern Ireland	8.21	8.43
		Ease of finding suitable accommodation in Northern Ireland	7.58	8.14
		Ease of finding suitable accommodation in the area	8.19*	7.96
		Ease of booking activities and attractions online	7.33	7.75
		Ease of booking accommodation online	7.90	8.49
		Ease of booking transport within Northern Ireland	6.29	7.19
ARRIVAL	7.40	A feeling of being welcomed when you arrived in Northern Ireland	8.04	8.11
		Clear signs to let you know when you have arrived in Northern Ireland	6.95	7.48
		The availability of tourist information at the air or sea port you arrived at	6.77*	7.45
GETTING AROUND IN THE AREA	7.27	Signs that help you find interesting/key tourist locations	7.78	7.69
		Quality of signposting for roads/directions	7.58	7.58
		Availability of trains	---	7.88
		Value for money of trains	---	7.52
		Availability of buses	---	7.93
		Value for money of buses	---	7.75
		Availability of taxis	---	8.02
		Value for money of taxis	---	7.86
		Friendliness and professionalism of taxi drivers	---	8.68
		Friendliness and professionalism of bus drivers	---	8.49
		Car touring routes which point out places along the way	7.10	7.09
		A feeling of being welcomed when you arrived in the area	8.08	8.08
		Places by the road to stop while driving and view the landscape	6.59	6.74
		Availability and cost of parking	7.40	7.14
		Signposting for exploring the area by foot	6.68	7.08
Quality of the roads	6.81	7.15		
VISITOR INFORMATION	8.67	Friendliness and efficiency of service	8.84	9.08
		Availability of useful information	8.60	8.95
		Suitable opening times	8.66	8.66
		Staff convey a sense of pride/belief in their local area	8.67	8.93
		Staff provided ideas about things to see and do	8.59	8.75

SIGNIFICANTLY HIGHER THAN THE AVERAGE FOR NI

SIGNIFICANTLY LOWER THAN THE AVERAGE FOR NI

---- = INSUFFICIENT BASE

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

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

Base: n=302



SIGNIFICANTLY HIGHER THAN THE AVERAGE FOR NI

SIGNIFICANTLY LOWER THAN THE AVERAGE FOR NI

EXPERIENCE OF FERMANAGH & OMAGH

---- = INSUFFICIENT BASE

	MEASURE	FERMANAGH & OMAGH	NORTHERN IRELAND
DIGITAL CONNECTIVITY	6.56 The mobile phone signal	6.88	7.47
	The availability of free Wi-Fi	6.63	6.97
	The availability of 3G/4G coverage	6.18	6.82
EATING OUT	7.41 Professional, efficient service	7.93	8.22
	Friendly, welcoming staff	8.32	8.54
	Value for money of eateries	7.43	7.73
	Menus featuring locally sourced ingredients	6.95	7.34
	Quality of food and drink	7.79	7.98
	Information on places to eat and drink out	6.69	7.17
	Places to eat available at the times of day and night that suit you	7.43	7.75
	Range of restaurants/cafes/coffee shops	7.37	7.74
	Availability of food to suit dietary requirements – vegetarian/vegan/gluten free	6.82	7.08
ACCOMMODATION	8.22 Quality of accommodation	8.49	8.46
	Value for money of accommodation	8.18	8.22
	Professional and efficient customer service	8.43	8.57
	Friendly and welcoming staff/host	8.79	8.87
	Accommodation that is a key part of the holiday experience itself	8.18	8.12
	Staff knowledgeable about interesting things to see and do in local area	7.90	8.07
	Availability of free Wi-Fi	7.55	8.12
ATTRACTIONS	8.42 Value for money of attractions (historic sites, museums, visitor centres etc.)	8.03	7.95
	Information at visitor attractions in your own language	---	5.80
	A range of interesting/enjoyable visitor attractions	8.35	8.34
	Quality of interpretation and storytelling at museums/visitor centres in area	8.46	8.27
	Professional and efficient staff at attractions	8.71	8.56
THINGS TO SEE AND DO	7.52 Friendly staff at the attractions	8.88	8.80
	Unique things to do and see that reflect the area's local culture	8.05	8.12
	The range of outdoor activities	7.90	7.80
	Opportunities to attend local events/festivals	6.74	6.91
	Range of interesting/enjoyable things to see/do in the area	7.93	8.20
	Shopping opportunities	6.94	7.16
Somewhere you could meet and mix with the local people	7.53	7.59	

	MEASURE	FERMANAGH & OMAGH	NI
EXPERIENCE	7.92 Cities, towns & villages	7.92	8.15
	7.56 Activities	7.56	7.83
	8.80 Beautiful scenery/landscapes	8.80	8.90
	8.25 Friendly local people	8.25	8.47
	8.38 Rich history and culture of area/NI	8.38	8.61
	5.12 Ability to trace ancestral links	5.12	6.05
	5.84 Availability of special offers e.g. Groupon deal/good deal on accommodation	5.84	5.58
	6.28 Screen tourism	6.28	7.14
	8.67 Overall experience during this visit, based on the time you spent in area	8.67	8.77
	ENOUGH TO DO	7.22 There was enough to do in all weather conditions	7.22
6.64 There was enough to do in the evenings		6.64	7.16
6.55 There was enough to do on Sundays		6.55	6.90
CLEANLINESS /SAFETY	7.40 Cleanliness and availability of public toilets	7.40	7.21
	7.95 Cleanliness of area/litter free	7.95	7.93
	8.41 Cleanliness of the beaches	----	8.41
	8.43 Sense of safety and security while walking around the area	8.41	8.43

The staff encountered at attractions in the Fermanagh & Omagh area have been a key tourism asset, and the quality of accommodation scored higher than the NI average.

By making information on places to eat in the area more readily available and highlighting the use of local produce, the eating out experience could be enhanced. Digital connectivity requires attention.

For further information please contact the **Insights and Intelligence Service** (insights@tourismni.com)

For access to Tourism NI's Visitor Attitude Survey fact cards for Northern Ireland and for each council area, click [HERE](#).

For Tourism NI's fact cards on the value and volume of tourism in each of the 11 council areas (based on data released by NISRA), click [HERE](#).

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

Base: n=302

INTERPRETING TNI'S 2018 VISITOR ATTITUDE SURVEY



SURVEY BACKGROUND & RATING SCALE

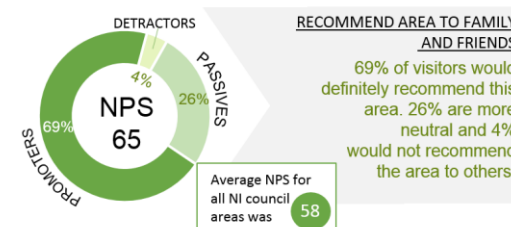
- Tourism Northern Ireland's (TNI) 2018 Visitor Attitude Survey (VAS) was carried out by Cognisense, an experienced market research company. The research was conducted in compliance with the International Standard ISO 20252:2012
- The VAS collected information on a wide range of areas to help TNI better understand visitor profiles, behaviours and attitudes towards tourism products and services
- The **VAS supplements national and local government level data** on tourism which is collected throughout the year by a number of agencies, and is published by the Northern Ireland Statistics and Research Agency (NISRA) – click [HERE](#) for NISRA's Northern Ireland (NI) tourism statistics
- The VAS is undertaken during **high season only** and therefore the findings reflect the views of those taking a trip in NI between June-October 2018 only
- **Participants of the VAS were approached in key tourism locations/attractions** across NI's 11 council areas and invited to take part in a short face-to-face survey, followed by an on-line survey on completion of their trip
- The sample comprised **leisure overnight and day trip visitors** (e.g. visitors on a trip to NI for purely business purposes were excluded)
- **NI and out-of-state (from outside NI) visitors** on a day or overnight leisure trip in NI were eligible to participate

Respondents were asked to rate various experiences on a scale of 0-10.

Generally, satisfaction scores over 8 are excellent, between 7-8 are adequate and less than 7 require attention.

NET PROMOTER SCORES

Net Promoter Scores (NPS®) are presented in the survey findings.



The NPS is determined by subtracting the percentage who are detractors from the percentage who are promoters.

- What is generated is a score between -100 and 100
- At one end of the spectrum, if everyone gave a score lower or equal to 6, this would lead to a NPS of -100
- On the other end of the spectrum, if everyone answered with a 9 or 10, then the total NPS would be 100



$$\text{NPS} = \% \text{ 😊 } - \% \text{ 😞 }$$

- Each council fact card contains the council level NPS (based on the number who would recommend the area), together with the average NPS score for all NI council areas
- The NI fact card contains a NI level NPS score, based on those who would recommend NI
- The council level and NI level NPS scores are not directly comparable as the former relates to the area, while the latter relates to NI. The NI NPS is based only on responses from out of state visitors, while the council level NPS is based on scores from both domestic and out of state visitors

NPS®, Net Promoter® & Net Promoter® Score are registered trademarks of Satmetrix Systems, Inc., Bain & Company and Fred Reichheld.