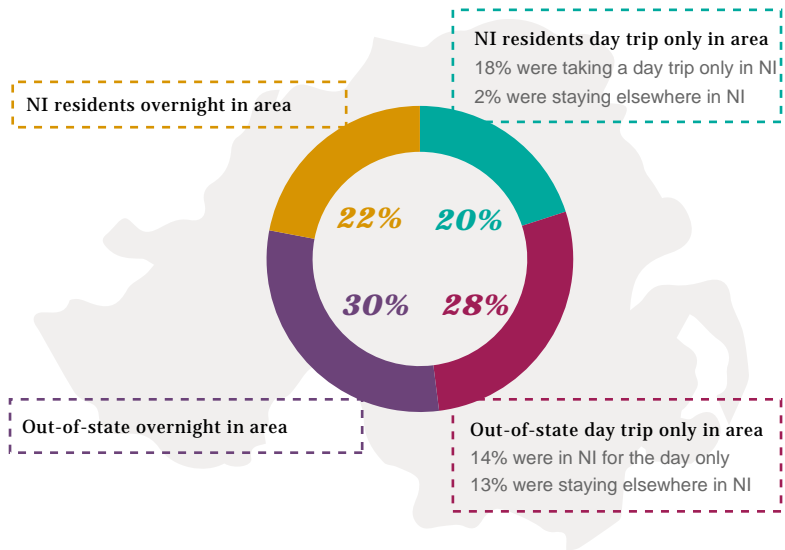


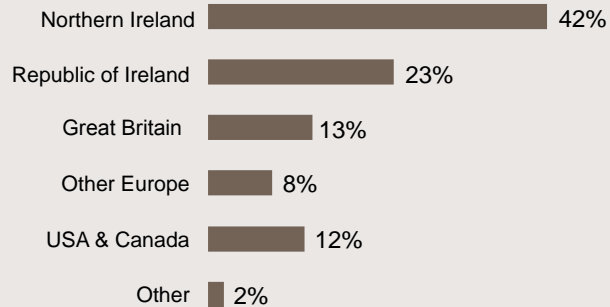
DESTINATION FERMANAGH

Fermanagh attracts the greatest proportion of overnight leisure visitors, with just over half staying in the region. These overnight visitors were fairly evenly split between domestic visitors and those from out-of-state. Visitors to Fermanagh enjoyed an outdoor experience, with many choosing to visit this region specifically to enjoy the lakes. While visitors didn't necessarily come for a specific attraction, the wide range of places to see both new and familiar to some were key reasons to visit

LEISURE VISITORS

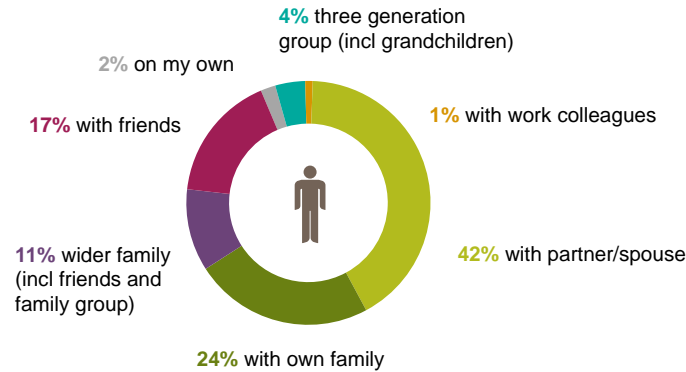


ORIGIN OF THOSE VISITING DESTINATION

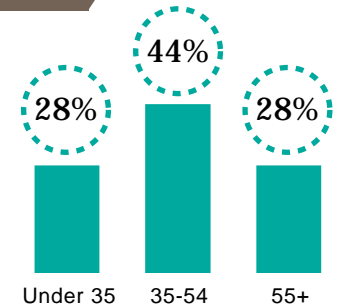


PARTY TYPE

Average number of people in party is 3.51 - slightly smaller than average across all 9 destinations



AGE

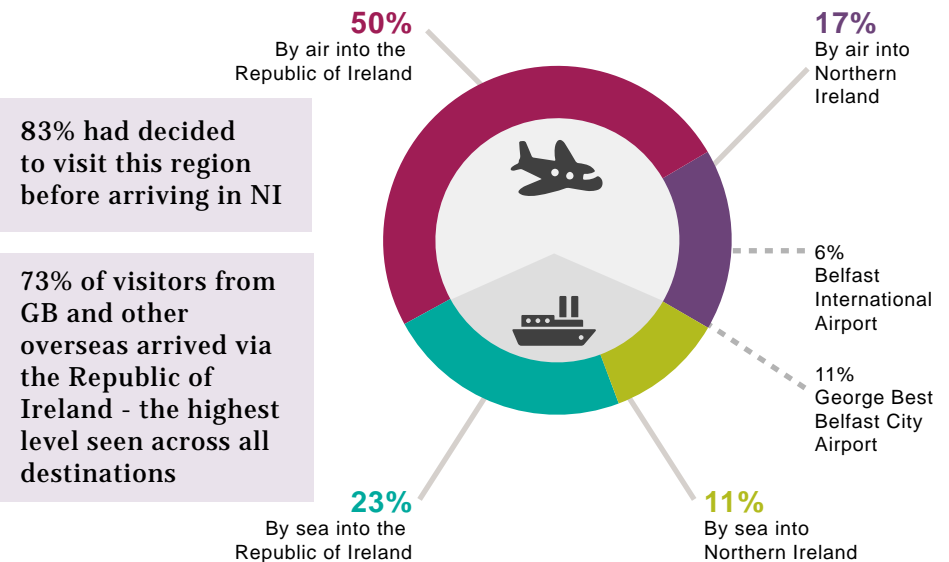


Compared to most other regions, a high number of visitors were travelling with a partner or friends

Visitors were slightly less likely than most other regions to have children in their party (31%), hence wanting lots for children to do was less of a motivation for taking the trip in the first place, compared to many other regions

Overnight visitors stayed for **4.82** nights on average.

MEANS OF TRANSPORT INTO ISLAND OF IRELAND



83% had decided to visit this region before arriving in NI

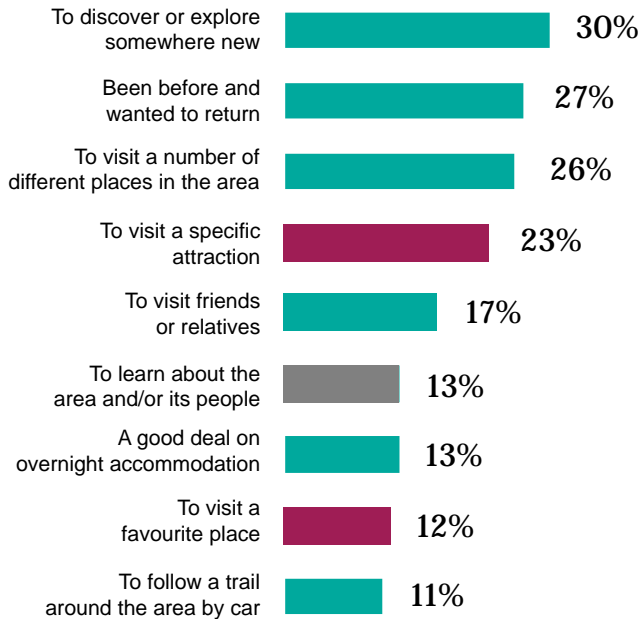
73% of visitors from GB and other overseas arrived via the Republic of Ireland - the highest level seen across all destinations

Source: Tourism Northern Ireland Visitor Attitude Survey 2014 (Millward Brown)



DESTINATION FERMANAGH

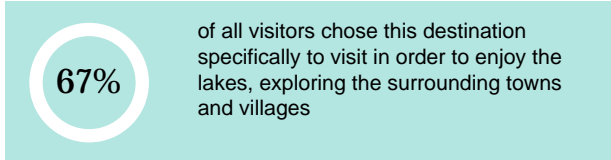
KEY REASONS TO VISIT



■ Higher* than average for all destinations
■ Lower* than average for all destinations
■ Equal to average for all destinations

*Not necessarily significantly higher or lower

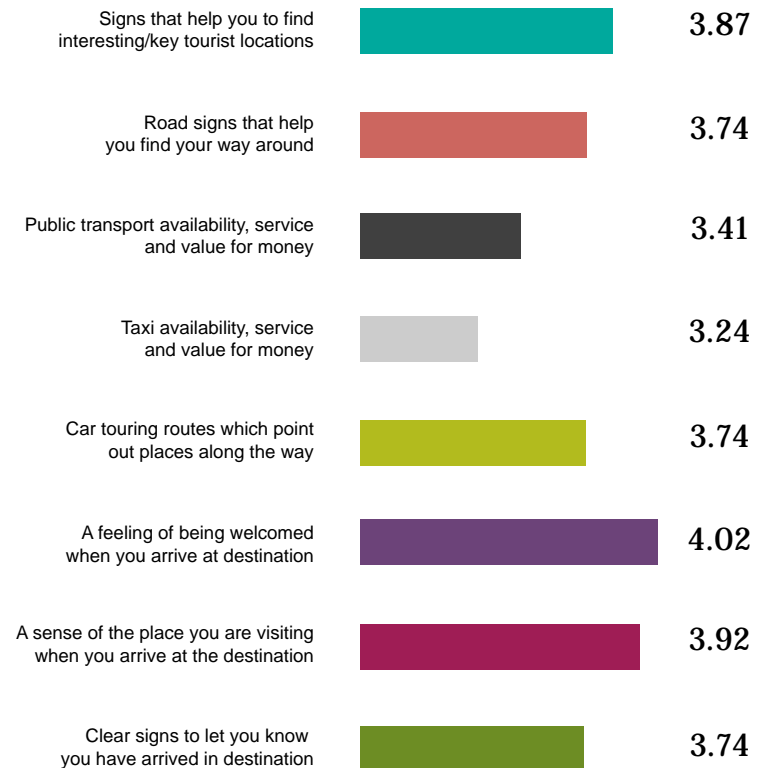
Visitors were less likely, compared to other regions, to be visiting to see a specific attraction. This destination has a broader appeal both for those wanting to discover or explore somewhere new or those who had been before and wanted to return. More so than for most other regions, visitors to Fermanagh wanted to visit a number of different places. Compared to other regions getting a good deal on overnight accommodation was cited as one reason for visiting



Taking a trip as a bit of a treat or change of scenery and wanting a good deal and nice accommodation, while not the most frequently cited, was a much greater motivation for taking a trip in Northern Ireland for visitors to this region than for any other area, for both NI residents and those from further afield

ARRIVAL AND GETTING AROUND

In terms of arriving and getting around the region, ratings for this destination were somewhat mixed. Public transport and taxi service were relatively poorly rated and while some other issues could be improved on including signs that you have arrived in the region, once there, ratings were generally amongst the highest. This is especially true in terms of signs to guide you around and to find interesting things to see and do. And fairly unusually, NI residents were more likely to rate all these aspects better than out-of-state visitors



OTHER KEY DESTINATIONS ALSO VISITED

Out-of-State visitors also visited:



88% of visitors from GB and other overseas (the highest level for all regions) also visited the Republic of Ireland on the same trip and were more likely than most to visit Donegal, Galway, Sligo and Mayo

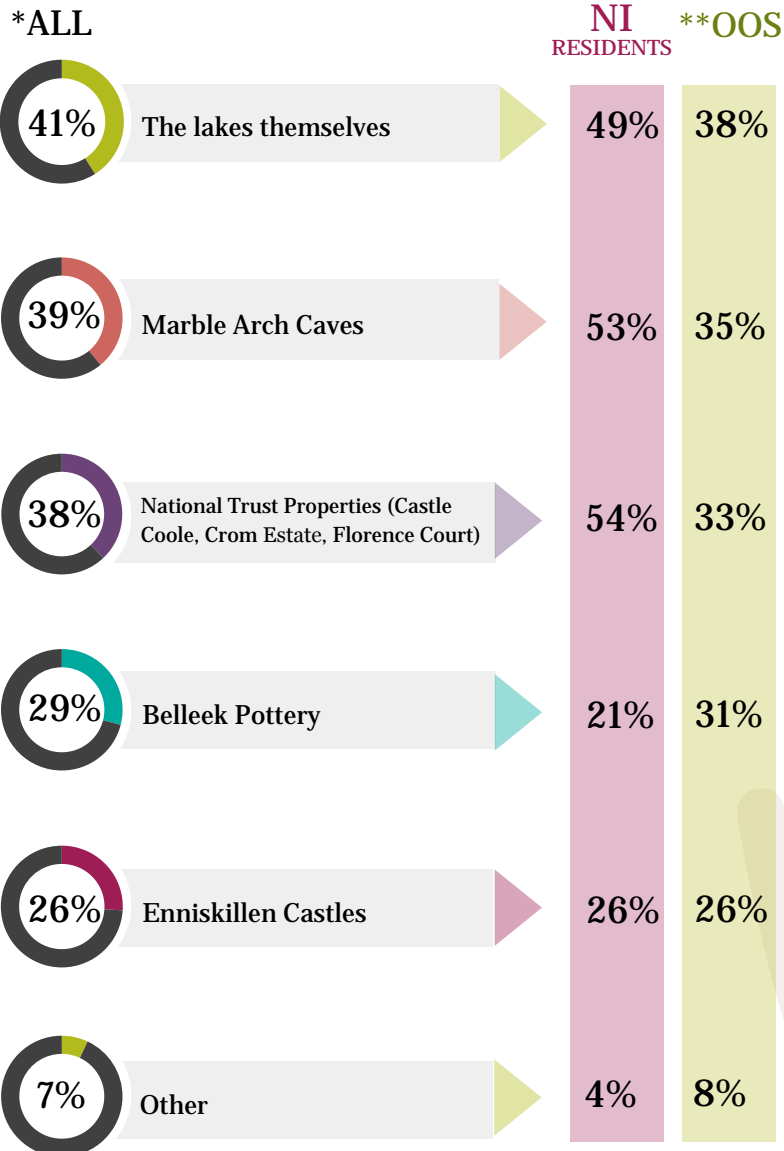
Mean scores 5=Excellent

Source: Tourism Northern Ireland Visitor Attitude Survey 2014 (Millward Brown)



DESTINATION FERMANAGH

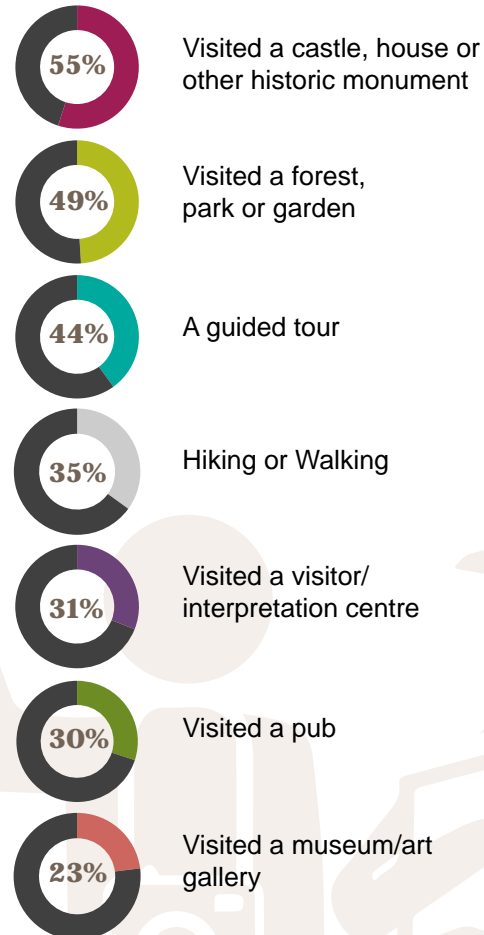
POPULAR PLACES VISITED



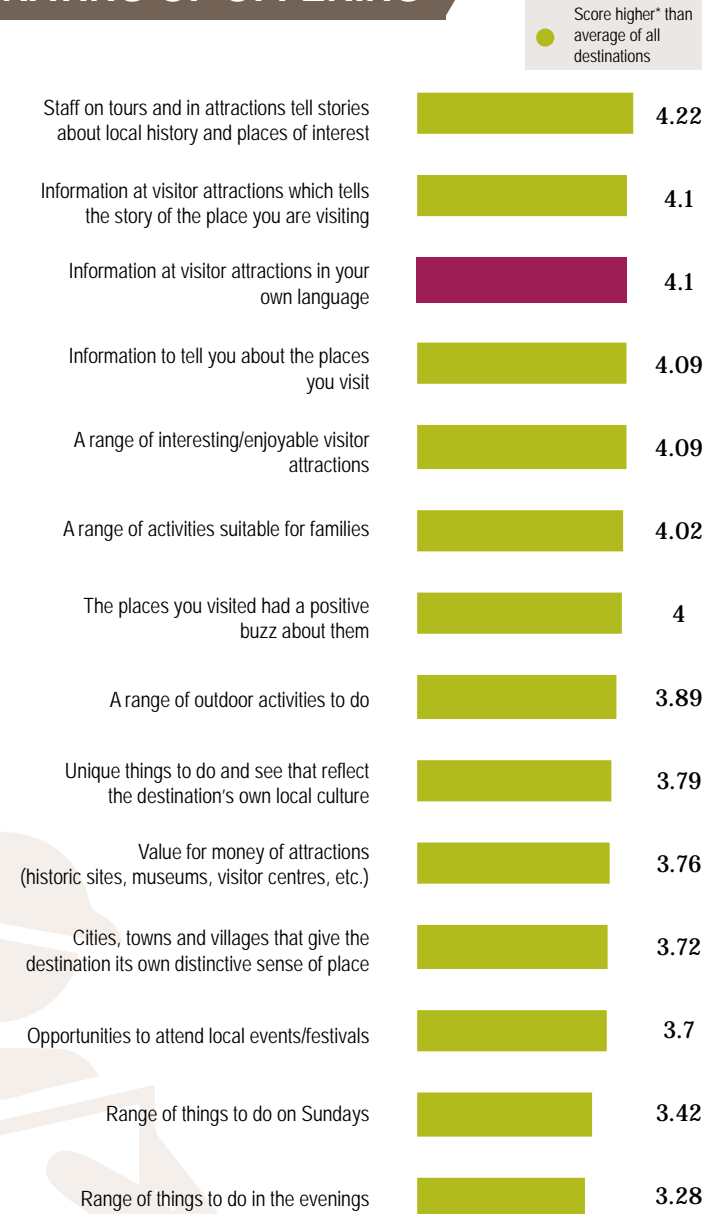
*Based on all visitors to the region
**OOS refers to visitors from outside of NI

Compared to other destinations, visitors to Fermanagh were more likely to visit a castle, house or other historic monument and for most this included a guided tour. The range of attractions (including the lakes and caves) scored highly

ACTIVITIES



RATING OF OFFERING



*Not necessarily significantly higher

Mean scores 5=Excellent

Source: Tourism Northern Ireland Visitor Attitude Survey 2014 (Millward Brown)

DESTINATION FERMANAGH

PLACES TO EAT



CAFES
51%

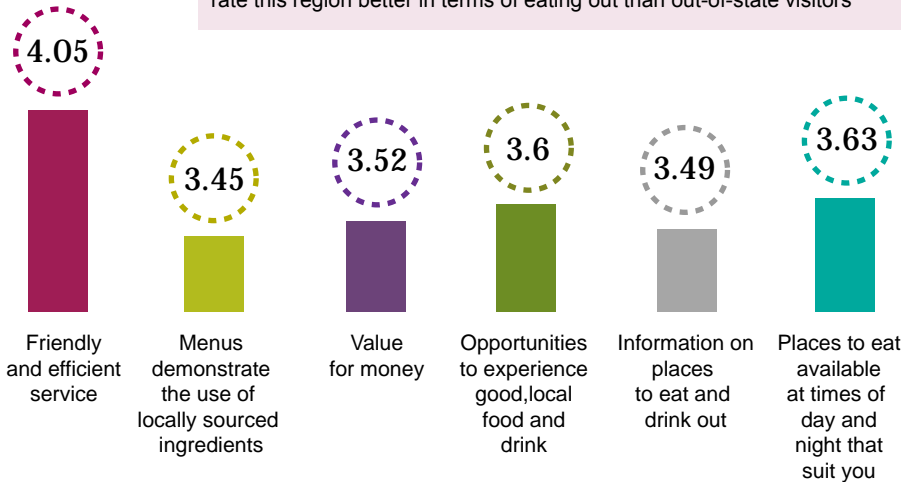


PUBS OR BARS
40%

Most popular types
of places to eat

Mean scores
5=Excellent

Ratings were mixed, generally around average, but highest of all regions for information on places to eat and drink out. Domestic visitors tended to rate this region better in terms of eating out than out-of-state visitors



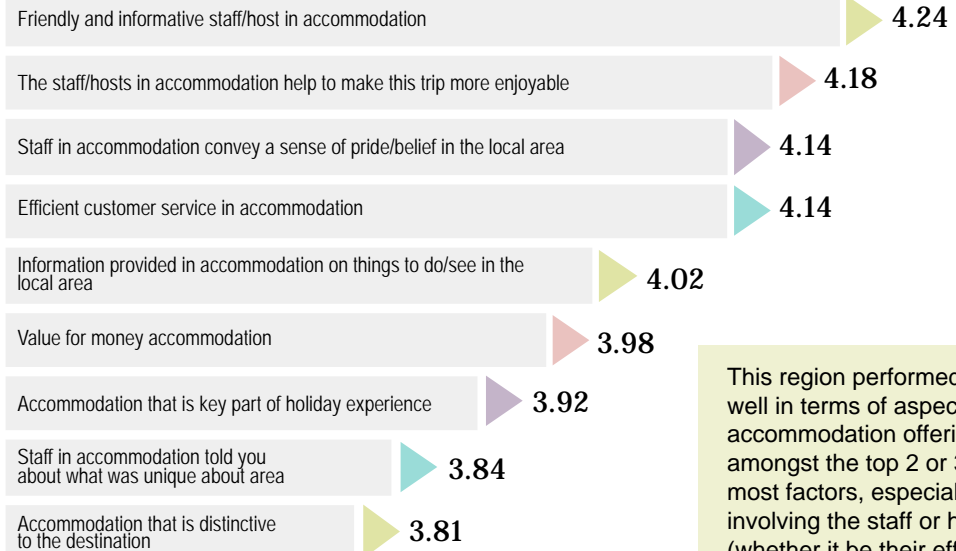
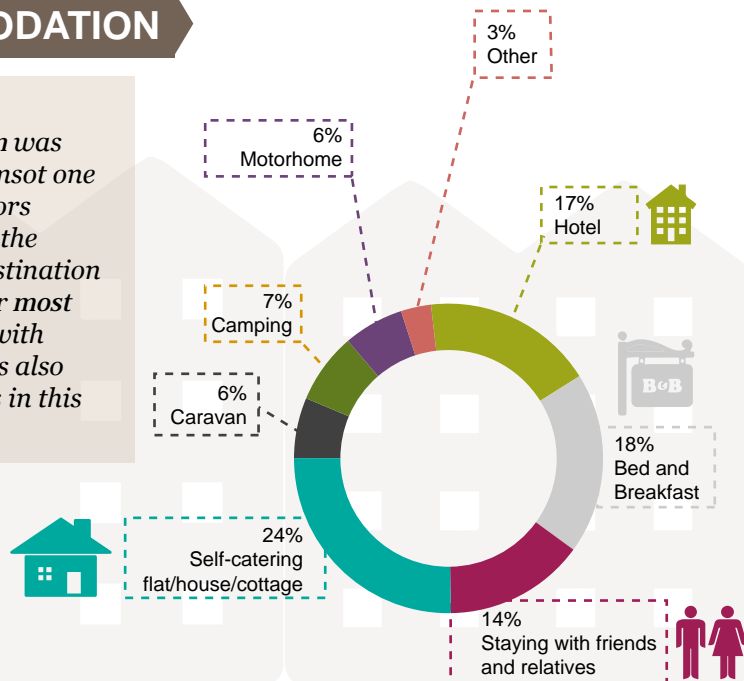
As a rule NI in general is not particularly well rated across most aspects of the eating out experience

VISITOR INFORMATION

Visitor Information Centres were rated very highly across Northern Ireland for all measures, especially seen as having friendly and efficient service and staff that convey a sense of pride or belief in their local area. The rating of the centre in this area was even more positive than the average seen across all regions

ACCOMMODATION

Self-catering accommodation was favoured by almost one quarter of visitors staying over in the Fermanagh Destination (higher than for most other regions) with B&Bs and hotels also popular choices in this destination

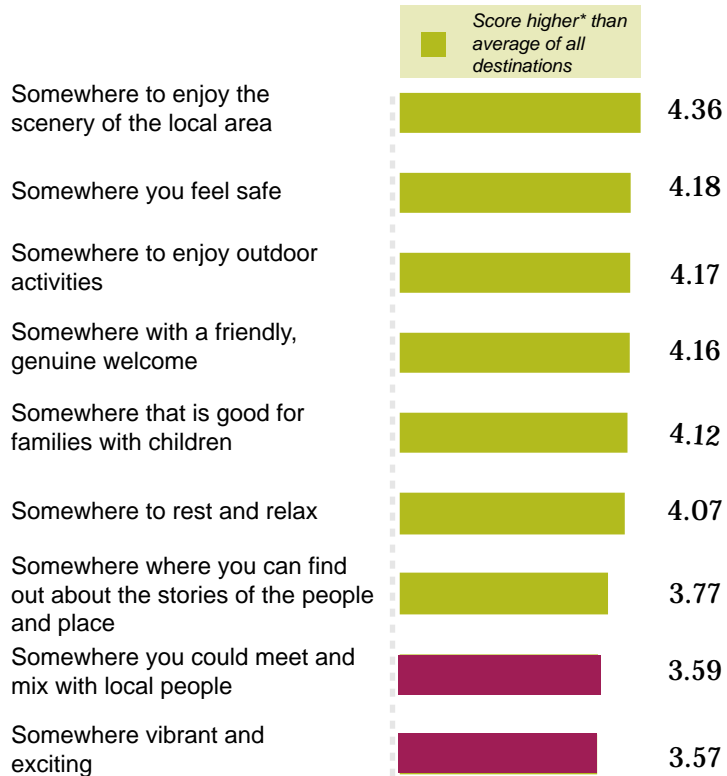


Mean scores
5=Excellent

This region performed relatively well in terms of aspects of the accommodation offering, rated amongst the top 2 or 3 across most factors, especially those involving the staff or hosts (whether it be their efficiency, friendliness, belief in their local area or provision of information about surrounding area)

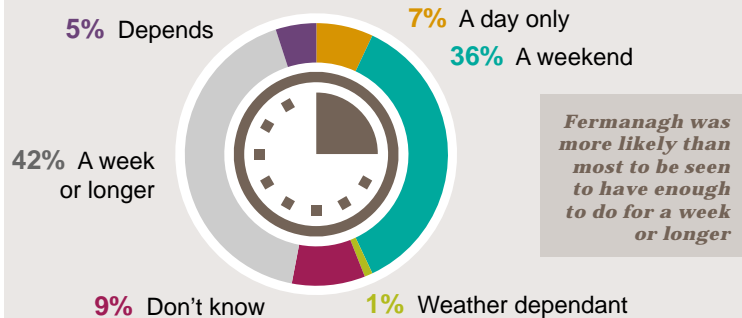
DESTINATION FERMANAGH

DESTINATION EXPERIENCE



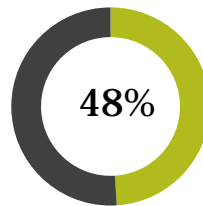
*Not necessarily significantly higher Mean scores 5=Excellent

VISITORS THOUGHT THERE WOULD BE ENOUGH TO DO IN THIS DESTINATION FOR:



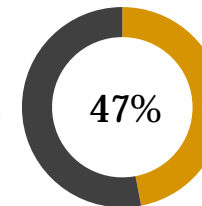
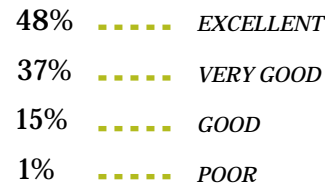
DESTINATION RATINGS

Overall visitors had a good time in this region. For most their visit was better than expected and as such they are highly likely to recommend the area to friends and family. In terms of its competitiveness with other destinations outside NI, it was rated close to the average of all NI regions, more likely to be perceived as the same rather than better. Unlike most other regions, this area was more highly rated by NI residents



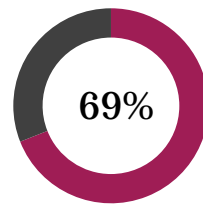
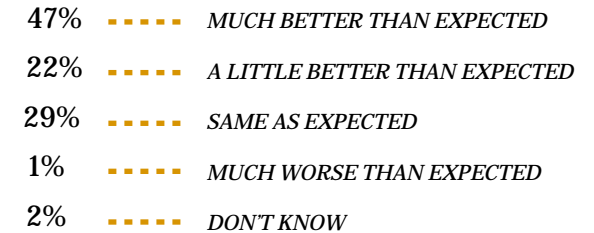
RATING OF TIME SPENT IN DESTINATION AS "EXCELLENT"

Overall rating for Fermanagh was very similar to average of all destinations. NI residents and those staying overnight in Fermanagh rated the region a little better than others



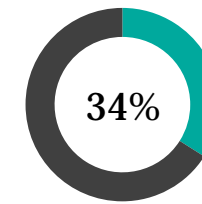
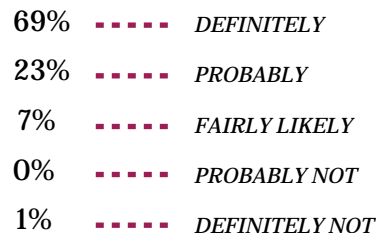
FERMANAGH IS "MUCH BETTER THAN EXPECTED"

Fermanagh was rated marginally better than the average across all areas and as in other destinations, it was rated better by those staying over. However NI residents were slightly more likely to rate the region better than out-of-state visitors



"WOULD DEFINITELY RECOMMEND AREA TO FRIENDS AND FAMILY"

The likelihood of recommending this region to others was similar to the average of all destinations. NI residents were again slightly more likely to do so



"MUCH/SLIGHTLY BETTER THAN OTHER REGIONS OUTSIDE OF NI FOR HOLIDAY"

The Fermanagh area scored slightly lower than average in terms of being favourably compared to other destinations outside NI, with NI residents again more likely to rate this positively compared to out-of-state visitors (the reverse of the pattern seen for most other destinations for this rating)

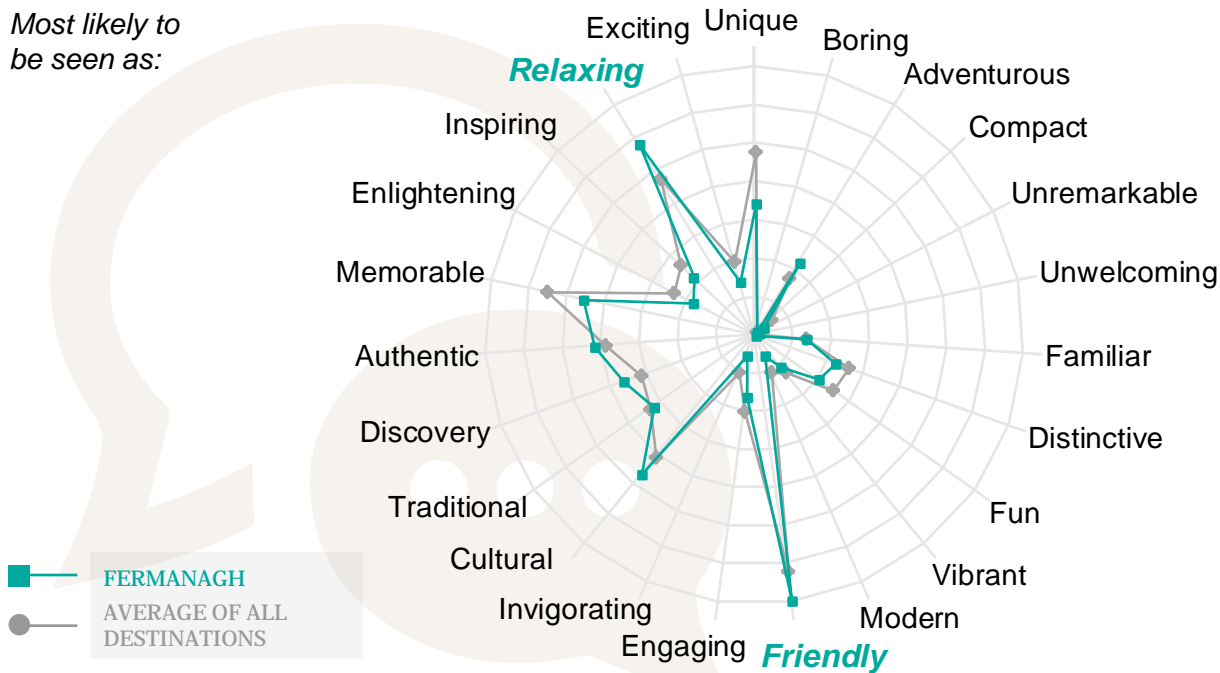


Source: Tourism Northern Ireland Visitor Attitude Survey 2014 (Millward Brown)

DESTINATION FERMANAGH

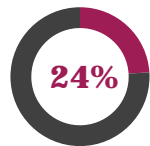
WORDS CHOSEN TO DESCRIBE DESTINATION

Most likely to be seen as:



Of all destinations Fermanagh was one of the regions most likely to be described as Friendly (73%) and for Discovery (38%) and more likely than most other regions to be seen as Relaxing (61%), Authentic (44%), Cultural (49%) and Adventurous (23%). Like some other destinations Fermanagh was not viewed as particularly unique

Visitors to this area were least likely to have shared their experience using social media. They were also less likely than visitors to most other regions to leave online reviews despite the importance those staying overnight in this region place on them (almost 60% said they were very or extremely important)



Uploaded trip photos



Left online reviews

MEMORABLE EXPERIENCES



'A visit to the Marble Arch Caves which is a unique experience made all the more enjoyable with the banter from the guides delivering the factual information with some fun.'



'Beautiful 360 degree scenery'

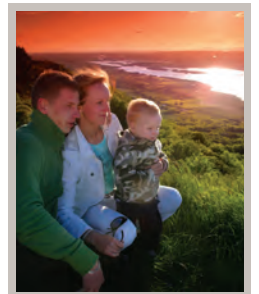


'Fermanagh County Museum has a great mix of historical and artistic displays together with a brilliant military museum all located in a very scenic and historic castle.'

'Meeting the local people...everyone was absolutely lovely and welcoming. We were treated superbly in literally every single restaurant/bar we went into and felt like we were amongst friends.'



'Visited the Belleek Pottery Factory and was able to see how the pottery that my grandmother collected over the years was made. We were able to talk to some of the 'crafts people' who were working and got to see all of the stages. The showroom and the museum were both breathtaking and the 'hosts' were helpful and friendly... It was very memorable'



'Dining at beautiful thatched restaurant on shores of lower Lough Erne.'

DESTINATION FERMANAGH

- Higher than average of all
- Equal to average of all
- Lower than average of all

MEASURE	FERMANAGH	AVERAGE FOR ALL DESTINATIONS
Visitor Information Centre - Friendliness and efficiency of service	4.7	4.49
Visitor Information Centre - Availability of useful information	4.7	4.42
Visitor Information Centre - Staff convey a sense of pride / belief in their local area	4.48	4.4
Visitor Information Centre - Staff provided ideas about things to see and do	4.58	4.38
Somewhere to enjoy the scenery of the local area	4.36	4.22
Visitor Information Centre - Suitable opening times	4.21	4.16
Friendly and informative staff (accommodation)	4.24	4.14
Information at visitor attractions in your own language	4.1	4.1
Transport connections to and from the air or sea port (e.g. buses/car hire/taxis)	4.02	4.09
The availability of useful information to help you to plan your trip	4.11	4.08
That it is somewhere you feel safe	4.18	4.07
Staff convey a sense of pride/belief in the local area (accommodation)	4.14	4.05
The staff / hosts help make this trip a more enjoyable experience (accommodation)	4.18	4.05
That it is somewhere friendly, genuine, welcome	4.16	4.04
Staff on tours and in attractions tell stories about the local history and places of interest	4.22	4.04
That it is somewhere that is good for families with children	4.12	4.03
Ease of finding suitable accommodation	4.08	4.02
That it is somewhere to rest and relax	4.07	4.02
Information to tell you about the places you visit	4.09	4.01
Information at visitor attractions which tells the story of the place you are visiting	4.1	4
Sense of the place when you arrive in NI	3.93	4
Efficient customer service in accommodation	4.14	3.99
A sense of the place you are visiting when you arrive at your destination	3.92	3.99
Feeling of being welcomed when you arrive in NI	3.85	3.97
Friendly and efficient service in places to eat out	4.05	3.96
Availability/ease of finding information about the different regions within NI	4.06	3.95
Somewhere to enjoy outdoor activities	4.17	3.95
The places you visit have a positive buzz about them	4	3.92
A feeling of being welcomed when you arrive in chosen destination	4.02	3.9
Range of interesting/enjoyable visitor attractions	4.09	3.9
A range of activities suitable for families	4.02	3.89
Information on things to do / see in local area (accommodation)	4.02	3.89

The table above and on the next page provides a summary of all ratings used in the survey, presented in order according to the average rating given across all 9 destinations. Scores are based on the scale where 5=excellent, 4=very good, 3=good, 2=fair and 1=poor. Differences between scores for the destination and the average of all 9 destinations are not necessarily significant

DESTINATION FERMANAGH

- Higher than average of all
- Equal to average of all
- Lower than average of all

MEASURE	FERMANAGH	AVERAGE FOR ALL DESTINATIONS
Clear signs to let you know when you have arrived in your destination	3.74	3.88
Accommodation that is a key part of the holiday experience itself	3.92	3.88
Value for money of accommodation	3.98	3.82
Signs that help you find interesting /key tourist locations	3.87	3.8
The availability of tourist information at the air or sea port you arrive at (Excludes NI & ROI residents)	3.77	3.78
Staff tell you about what is unique about the local area (accommodation)	3.84	3.75
That you are able to find out about the stories of the people and place you are visiting	3.77	3.74
A range of outdoor activities to do	3.89	3.73
Unique things to do and see that reflect the destination's own local culture	3.79	3.72
Accommodation that is distinctive to the destination	3.81	3.71
Clear signs to let you know when you have arrived in NI	3.35	3.71
Road signs that help you to find your way around	3.74	3.69
Cities, towns and villages that give the destination its own distinctive sense of place	3.72	3.69
Opportunities to experience good local food and drink	3.6	3.64
That you are able to meet and mix with local people	3.59	3.61
Car touring routes which point out places to visit along the way	3.74	3.61
Taxi availability service and value for money	3.24	3.61
That it is somewhere vibrant and exciting	3.57	3.61
Places to eat available at the times of day and night that suit you	3.63	3.59
Value for money of attractions (historic sites/museums/visitor centres)	3.76	3.58
Opportunities to attend local events/ festivals	3.7	3.55
Public transport availability service and value for money	3.41	3.54
Value for money of places to eat out	3.52	3.51
Menus demonstrate the use of locally sourced ingredients	3.45	3.45
Information on places to eat and drink out	3.49	3.33
Range of things to do in the evenings	3.28	3.16
Range of things to do on Sundays	3.42	3.14

Further information is available on www.tourismni.com

For a full report and to access Tourism NI's fact cards for the other key tourism destinations click the arrow

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For Tourism NI's fact cards on the value and volume of tourism in each of the 9 key tourism destinations and 11 council areas (based on data released by NISRA) click the arrow

For further information please contact Anne-Marie Montgomery at Tourism NI (a.montgomery@tourismni.com)

Source: Tourism Northern Ireland Visitor Attitude Survey 2014 (Millward Brown)

